



CARROLL COUNTY • MD

ECONOMIC DEVELOPMENT & LAND USE STUDY

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ACKNOWLEDGMENTS

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TABLE OF CONTENTS

Introduction	1	Industrial Market	45
Executive Summary and Findings	5	Hotel/Hospitality Market	47
Economic Profile	15	Retail/Dining/Entertainment Market	48
Introduction	17	Development Functions	53
Summary of Population Trends	17	Introduction	55
Regional Economic Activity	18	Site Development	55
Businesses and Industries	18	Zoning and Land Use Analysis	59
Concentration of Businesses	19	Countywide	61
Overview of Carroll County's Industries	19	Regional Comparison	64
Key Industry Sectors	20	I-1 and Employment Campus Districts	65
Employment	26	Growth Scenarios	67
Economic Projections	29	Market Demand	69
Workforce Characteristics	31	Market Development	70
Key Economic Development Infrastructure and Resources	35	Land Use	71
Real Estate Market Overview	39	Infrastructure <i>Drinking Water and Wastewater</i>	72
Introduction	41	Infrastructure <i>Transportation</i>	73
Residential Market Overview	41	Fiscal Sustainability	74
Summary of Commercial Trends	43	Public Sentiment	75
Office Market	43		

Opportunities	77	Appendix A	137
Vacant Parcels	79	Appendix B	140
Major Corridors	80	Appendix C	145
Priority Greenfield and Redevelopment Matrix	84	Appendix D	146
Large Sites	95	Appendix E	147
Small Sites	105	Appendix F	149
Relevant Target Industries	111	Appendix G	153
Agritourism and Hospitality	112		
Manufacturing	115		
Small Business Incubation	117		
Economic Development Tools and Incentive Mechanisms	119		
Public Engagement	125		
Introduction	127		
Public Open Houses	127		
Stakeholder Interviews	132		
Focus Groups	133		
Online Surveys	134		
Stakeholder Interviews	136		
Board of County Commissioners Presentations	136		
Planning and Zoning Commission Presentations	136		

LIST OF FIGURES

Figure 1: Real GDP by County (2021)	18	Figure 15: Net Absorption, Net Deliveries and Vacancy (2023, Q1)	44
Figure 2: Concentration of Business in Carroll County (2022)	19	Figure 16: Carroll County Office Market Rent per Square Foot	44
Figure 3: Concentration of Carroll County's Health Care and Social Assistance Businesses (2022)	22	Figure 17: Carroll County Industrial Space Deliveries, Completed and Proposed	46
Figure 4: Concentration of Carroll County's Professional, Scientific, and Technical Services Businesses (2022)	23	Figure 18: Net Absorption, Net Deliveries, and Vacancy	46
Figure 5: Concentration of Employment in Carroll County (2022)	27	Figure 19: Carroll County Industrial Market Rents	47
Figure 6: Private Sector Employment Annual Rate of Change (2018 - 2022)	28	Figure 20: Carroll County Retail Market Rent per Square Foot	50
Figure 7: Annual Average Private Sector Employment (2018 - 2022)	28	Figure 21: Carroll County Retail Vacancy Rate	51
Figure 8: Annual Unemployment Rates (2013 - 2023)	29	Figure 22: Retail Construction - Average, Delivered, and Proposed	51
Figure 9: Carroll County Inflow/Outflow Workflow Patterns	31	Figure 23: Carroll County Development Review Process Responsible Agencies	55
Figure 10: Where Workers in Carroll County Live	32	Figure 24: Site Development Review Process Overview	56
Figure 11: Where Carroll County Residential Travel to Work	32	Figure 25: Industrial and Employment Campus Zones	65
Figure 12: Regional County Comparison of Estimated Telework Eligibility	34	Figure 26: MD 140 Employment Campus Zoning	66
Figure 13: Carroll County Multifamily Vacancy Rate	42	Figure 27: MD 26 Employment Campus Zoning	66
Figure 14: Effective Rent per Square Foot by Number of Bedrooms	42	Figure 28: Baltimore Boulevard (MD 140) at Finksburg Corridor Zoning	81
		Figure 29: Liberty Road (MD 26) Corridor Zoning	83
		Figure 30: Greenfield and Redevelopment Site Key Map	94

Figure 31: February Public Open House Results	129
Figure 32: Countywide Asset Map	130
Figure 33: Small Business Incubation Board	131
Figure 34: Total Number of Votes by Industry	131
Figure 35: Total Dollar Amount of Industry "Investment"	132
Figure 36: Investments that would Improve Business in Carroll County Figure	134
37: Highest Rated Business Challenges in the Next 12 Months	135
Figure 38: Ability to Find Internship or Work Experience Relative to a Course of Study	135
Figure 39: Current Living Arrangement	136

LIST OF TABLES

Table 1: Regional Population Trends	17	Table 17: Industrial Market Summary	45
Table 2: Comparison of Real Gross Domestic Product (GDP) by Peer Counties (2021)	18	Table 18: Carroll County Hotel Market Indicators	47
Table 3: Total Establishments by Industry Sector (2022)	20	Table 19: Carroll County Hotel Supply (2023, Q1)	48
Table 4: Composition of Construction Industry in Carroll County Compared to the State (2022, Q3)	21	Table 20: Retail Market Summary	48
Table 5: Composition of Health Care and Social Assistance Industry in Carroll County Compared to the State (2022, Q3)	22	Table 21: Key Retail Market Indicators	49
Table 6: Composition of Carroll County Retail Industry (2022)	24	Table 22: Retail Market Annual Trends	50
Table 7: Distribution of Carroll County Farms by Acreage (2017)	25	Table 23: Retail Construction - Average, Delivered, and Proposed	51
Table 8: Government and Private Sector Employment (2022, Q3)	26	Table 24: Acreage of Each Zoning Category in Carroll County	63
Table 9: Carroll County Private Sector Employment by Industry (2022, Q3)	26	Table 25: Acreage of Each Future Land Use Category in Carroll County	63
Table 10: Top 10 Employers in Carroll County by Employment Base (2022)	27	Table 26: Regional Zoning Categories Comparison	64
Table 11: Regional 10-Year Employment Change Projections (2020 - 2050)	30	Table 27: Vacant Parcel Matrix	79
Table 12: Key Industry Employment Projections, Carroll County (2018 - 2028)	30	Table 28: Zoning Coverage within Baltimore Boulevard (MD 140) Corridor Area	81
Table 13: Distance Traveled to Work, Carroll County (2020)	31	Table 29: Zoning Coverage within Liberty Road (MD 26) Corridor Area	83
Table 14: Carroll County Labor Force Profile (2022)	33	Table 30: Scores Matrix - Internal Site Factors	85
Table 15: Multifamily Market Summary	41	Table 31: Scores Matrix - External Site Factors	85
Table 16: Commercial Net Absorption Regional Comparison	43	Table 32: Development Opportunity Site Data	86
		Table 33: Agritourism Requirements	112
		Table 34: Farm Alcohol Producer Use: Entitlement Requirements	114

Table 35: Top 10 Manufacturing Companies in Maryland	115
Table 36: Comparison Jurisdiction Building Permit Expedited Review Processes	120
Table 37: Comparison Jurisdiction Impact Fees	120
Table 38: Maryland County Development Impact Fee an Excise Tax Revenues	121

INTRODUCTION

Overview

In preparation for the Carroll County General Development Plan (GDP), the Economic Development and Land Use Study (Study) is designed to provide a holistic, baseline assessment of the County's current economic drivers, as well as land use and zoning patterns that will support recommendations for economic growth in the forthcoming GDP. The Study's main components will be instrumental in providing guidance in the GDP's decision-making process. The following Study sections include:

- Economic Profile
- Real Estate Market Overview
- Development Function
- Zoning and Land Use Analysis
- Growth Scenarios
- Opportunities
- Public Engagement

Many factors influence people's decisions to live, work, or open a business in a given location. Carroll County lies within a region that competes for residents, jobs, and ultimately, tax revenue. The policies and processes of Carroll County can influence potential residents and businesses in deciding whether to locate or grow here versus somewhere else.

Given the County's robust economic development efforts and the magnitude of economic development partners and players, the Study highlights insights into Carroll County's economic development ecosystem.

Analytical insights are supplemented and supported through conversations with key regional economic development stakeholders and an assessment of the County's economic assets centered around economic development.

Information collected from key stakeholder interviews, and public engagement feedback gave context to the community's valued rural character and high quality of life. The feedback received helped to illuminate the County's unique assets and opportunities, desired industries, and the general public perception of growth which helps to sustain a successful future of balanced development in the County.

As the County continues to evolve and compete in the regional market, growth scenario planning can help to understand high-level economic and fiscal tradeoffs. This Study includes analyses of spatial land area that look at the County as a whole, meaning inclusive of unincorporated lands and lands inside of the municipal boundaries. It should also be noted that assumptions were made to establish these scenarios, and further data and analysis are warranted to establish those foundational goals and objectives for Carroll County's economic and developmental growth in the future GDP. For more information on the assumptions made to establish each scenario, refer to the Growth Scenarios section of this Study starting on page 77. The Study also includes a baseline assessment of housing as it pertains to economic development but suggests further analysis through an in-depth study to comprehensively evaluate housing supply and future residential development needs.



Carroll County Welcome Sign
Image Source: Carroll County Economic Development Department

Established Boundaries

The Carroll County legal boundary, as illustrated in the maps within Appendix G, is the maximum extent of land included in the Study. Areas of the Study include regional comparisons which review jurisdictionally similar land areas, e.g., if zoning area is calculated including the incorporated municipalities, then so too do the comparative figures.

Corporate Boundaries

The corporate boundaries are the extents of the eight municipalities of Carroll County; two cities (Westminster and Taneytown) and six towns (Manchester, Mount Airy, New Windsor, Union Bridge, Hampstead, and Sykesville). These eight municipalities oversee their own planning and zoning operations, limiting the County's responsibilities and opportunities in their borders. Because the Study only includes land within Carroll County, the western portion of Mount Airy in Frederick County has been removed.

Background

Understanding the history and regulatory framework of the County's zoning and land use is critical to the success of its economic development outlook.

Land Use Article of the Annotated Code of Maryland

The Land Use Article of the Annotated Code of Maryland (Land Use Article), delegates planning and land use regulatory powers to the State's municipalities, Baltimore City, and non-charter counties. Non-charter counties are required to comply with various sections of the Land Use Article, including but not limited to the approval of a comprehensive

plan (referred to as a General Development Plan in Carroll County and referred to as "General Development Plan" hereafter) by the governing legislative body. In Carroll County, the Planning and Zoning Commission is required to recommend approval of a General Development Plan to the Board of County Commissioners. The General Development Plan serves as a guiding document for public and private planning and land use-related actions and decisions.

Economic Growth, Resource Protection, and Planning Act of 1992

On October 1, 1992, the Maryland Economic Growth, Resource Protection, and Planning Act of 1992 (referred to as "Planning Act" hereafter) was passed, encouraging economic growth, concentrating development in suitable areas, and protecting natural resources through the establishment of eight visions. These visions were expanded to 12 visions in 2009 as part of the Smart, Green, and Growing legislation, a package of three planning bills that included the Planning Visions Act. The Planning Act is premised on the notion that local jurisdictions possess the appropriate and best knowledge of local conditions to establish goals that advance the 12 visions, and that the state is responsible to support localities' priorities through targeted infrastructure investment. Additionally, the Planning Act requires local jurisdictions to review and, if necessary, amend their plans at regular six-year intervals; and as amended most recently with the Sustainable Growth and Agricultural Preservation Act of 2012, every ten-year intervals. This provision ensures that plans are frequently reconsidered in light of changing landscapes, levels/demands of services, and new legislation.

Planning Visions Act

The Planning Visions Act replaced the 8 visions established in the 1992 Planning Act with 12 new visions. The 12 visions relate to:

- Quality of life and sustainability
- Public participation
- Growth areas
- Community design
- Infrastructure
- Transportation
- Housing
- Economic development
- Environmental protection
- Resource conservation
- Stewardship
- Implementation of the visions

The visions establish a state-wide policy towards land use, which are to be reflected in local comprehensive plans and implemented through local regulations. The Planning Visions Act also requires local jurisdictions and the Maryland Department of Planning (MDP) to report to the General Assembly the effect of Adequate Public Facility Ordinances (referred to as Adequate Public Facilities and Concurrency Management in Chapter 156 of the County code) on targeting growth inside Priority Funding Areas (PFAs), which are existing communities where local jurisdictions have identified them as opportune locations to concentrate future growth and state investment.

Smart and Sustainable Growth Act

The Smart and Sustainable Growth Act of 2009 attempts to strengthen comprehensive plans by requiring implementation measures and development-related decisions to be consistent with the plan. In addition to explicitly indicating the legislative intent to overturn the Court of Appeals ruling in *David Trail, et al. v. Terrapin Run, LLC et al.*, 403 Md. 523 (2008), the Act defines actions that are “consistent with” or have “consistency with” a comprehensive plan as those actions that further, and are not contrary to, the plan with respect to:

- Policies
- Timing of implementation of the plan
- Timing of development
- Timing of rezoning
- Development patterns
- Land uses
- Densities or intensities

Local ordinances and regulations, variances, special exceptions, conditional uses, annexations, and water and sewer plan amendments fall under these actions. The need for consistency with land uses and densities or intensities within the PFA does not fall under these actions; thus, allowing mixed-use development and density bonuses in areas where development is meant to be focused. The Act also requires Planning Commission and Board of Zoning Appeals members to complete an education course.

Comprehensive Plans

This Study builds upon prior comprehensive planning efforts to provide valuable insights for the County and inform future planning efforts such as the forthcoming General Development Plan. The plans listed below reflect the most current versions of this category of planning document for all jurisdictions and planning areas within the County.

- Carroll County Master Plan (Adopted, 1964; Revised, 2000) (Adopted, 2014; Revised, 2019)
- Freedom Community Comprehensive Plan (Adopted, 2018)
- Hampstead Community Comprehensive Plan (Adopted, 2010; Revised, 2017)
- Manchester Community Comprehensive Plan (Adopted, 2018)
- Mount Airy Community Comprehensive Plan (Adopted, 2014)
- New Windsor Community Comprehensive Plan (Adopted, 2007; Revised, 2010)
- Sykesville Community Comprehensive Plan (Adopted, 2021)
- Taneytown Community Comprehensive Plan (Adopted, 2010)
- Union Bridge Community Comprehensive Plan (Adopted, 2008; Revised, 2014)
- Westminster Community Comprehensive Plan (Adopted, 2009; Revised, 2019)

EXECUTIVE SUMMARY AND FINDINGS

Zoning and Land Use

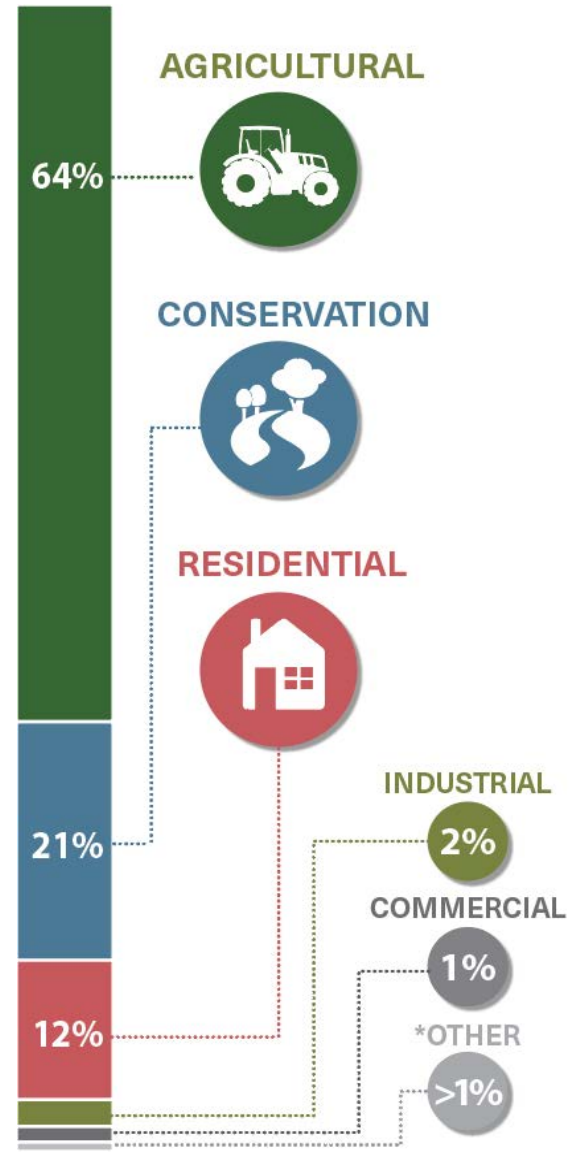
Carroll County's zoning and land use reflects its history, economy, and identity as a rural, agricultural community. Balancing this identity with meeting the future economic development needs of the County will be paramount as the County drafts its next General Development Plan (or Comprehensive Plan).

Carroll County's current land area shows an emphasis on agricultural and residential uses with industrial, commercial, and other land uses accounting for less than 5% of the county's land area.



Farm in Carroll County
Image Source: Carroll County Economic Development Department

USE PERCENTAGE OF COUNTYWIDE LAND AREA

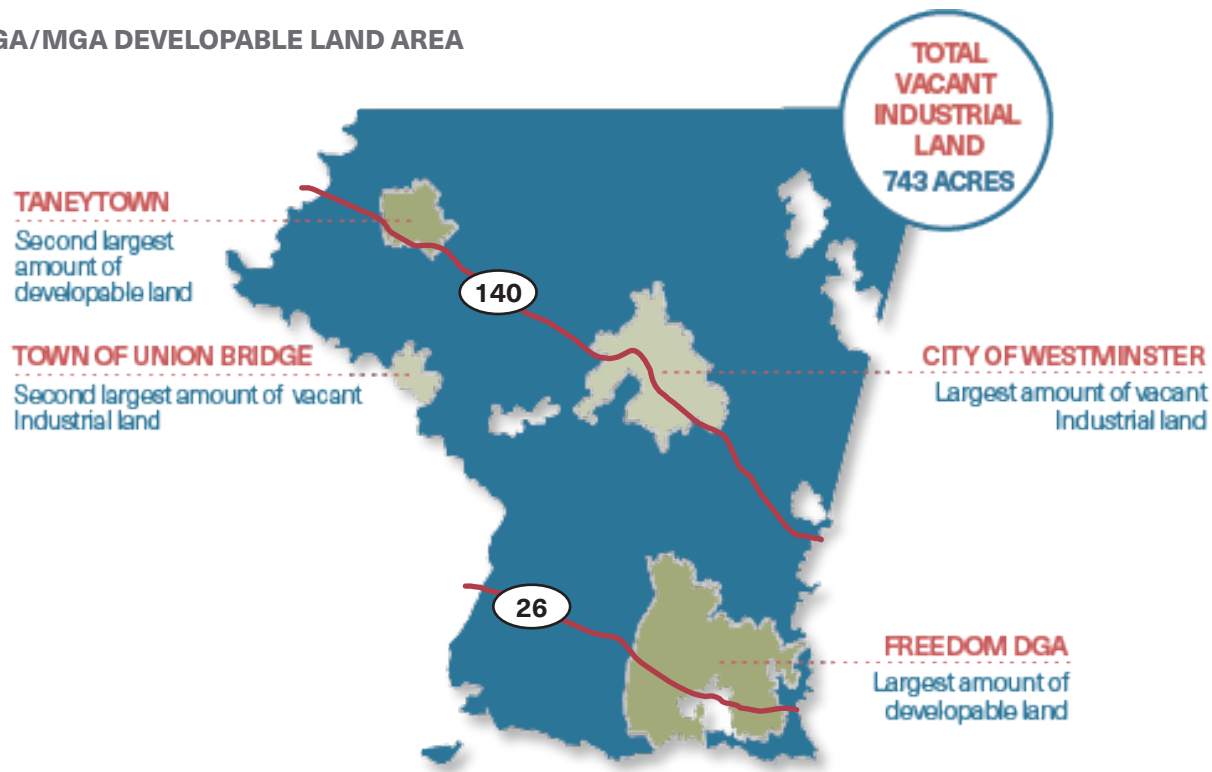


*Contains the Employment Campus, Heritage, Mixed Use, PUD, and Residential Office zoning designations.

In addition to its Agricultural land use, Carroll County's award-winning Agricultural Land Preservation Program (ag. pres) has been highly successful in its mission to support the County's farming community through the purchase of conservation easements. The effect of this on Carroll County's economic development outlook is limited, as very few preserved parcels are in a DGA/MGA.

The Municipal Growth Areas (MGAs), originally referred to by the County as Designated Growth Areas (DGAs), are critical planning areas that can affect the County's long-range economic development potential. Consistency between municipal- and county-designated future use of vacant or underutilized land is most important within these areas. Additionally, major transportation corridors, such as Baltimore Boulevard (MD 140) and Liberty Road (MD 26), present areas for economic opportunity as they are gateways through the county and prime locations to handle an increase in traffic and activity.

DGA/MGA DEVELOPABLE LAND AREA



QUICK NOTES

- Land zoned for Industrial and Commercial uses is mostly located within a quarter mile of state roads, along major transportation corridors.
- The county has a relatively low percentage of both industrial and commercial land in comparison to other counties in the region.
- Over 78K acres of land have been preserved across four ag. pres. programs. Specifically, the Carroll County Easement Purchase Program has preserved over 24K acres at a cost of \$173,326,778.
- The Baltimore Boulevard (MD 140) corridor has water and sewer facility constraints.
- The Liberty Road (MD 26) corridor has public water and sewer availability.

Economic Profile

By many metrics highlighted throughout this analysis, Carroll County reflects a stable economy with a broad economic base of industries, including renowned agricultural production, a steady employment base, high levels of employment, quality economic development resources from small business services to workforce development, and a multitude of economic assets.

By total businesses and employment base, key industries include health care and social assistance; retailers; service-oriented businesses; construction companies; and other professional, scientific, and technical services.



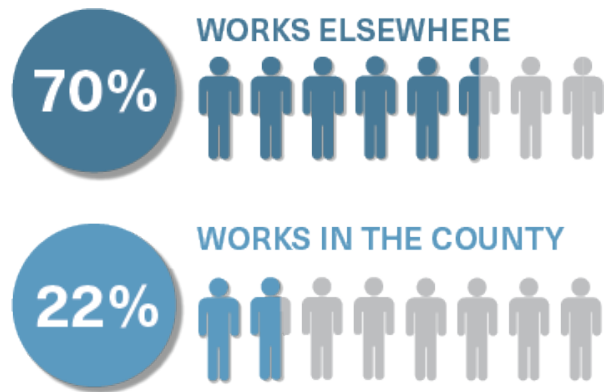
Agriculture remains a considerable part of Carroll County's economy, with 1,174 farms throughout the County, 98% of which are considered family farms, as reported during the last agricultural census conducted by the US Department of Agriculture. It shall be noted that a "family farm," is defined as any farm in which the majority of the business is owned by an operator and any individuals related to them by blood, marriage, or adoption, including relatives who do not live in the operator's household.

Carroll County has a significant network of economic development resources, infrastructure, and assets linking to the County's economic success. Robust partnerships with the Carroll County Department of Economic Development help attract new businesses to Carroll County, retain existing businesses, target support for large corporations and entrepreneurs alike, and enhance workforce development that benefits Carroll County's residents and workers.



The County attracts workers from Baltimore County, Frederick County, Adams County, Howard County, and York County, equating to nearly 40% of Carroll County's workforce. However, almost three-quarters of the working residents in Carroll County leave the County to work elsewhere. Nearly 70% of Carroll County's workforce travels 24 miles or less to work and approximately 41% of workers are estimated to be eligible for telework.

COUNTYWIDE WORKING RESIDENTS



Long-range employment projection forecasts for Carroll County anticipate an 11% increase in the County's employment base over the next 30 years, by 2050. This lags slightly behind the region's overall expected 15% employment increase.

Carroll County offers a strong base of economic development infrastructure and resources for businesses and employers and workforce development resources to support economic development in the County. The County's existing economic development tools prioritize servicing the economic goals of the County, such as expanding the tax base, prioritizing business attraction and retention, preserving agricultural character, and helping to maintain it as a viable community to live and work in.

COMPARISON OF EMPLOYMENT BASE PROJECTIONS (2022 - 2050)

Carroll County

11%

Region

15%

Harford County

23%

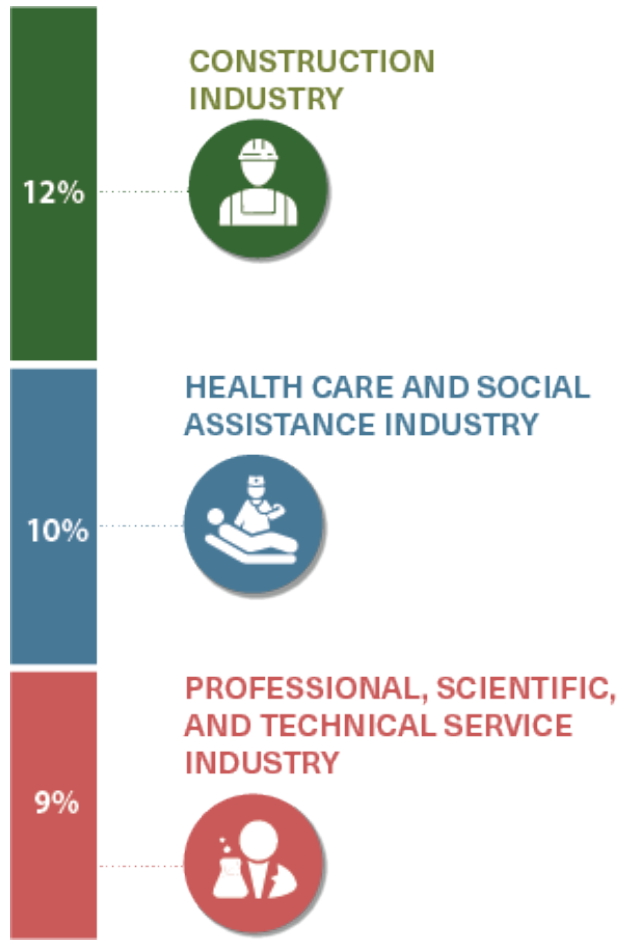
Howard County

35%

Targeting industry sectors for growth in the coming years can help the County strategically position itself for an optimal future that enhances the economy while continuing to celebrate the character and atmosphere that Carroll County and its community prides itself on. As such, achieving a blend of strengthening current industries with relevant emerging industries may help transition Carroll County toward the future.

In addition, stakeholders and business owners who participated in focus groups during the Study process were asked to participate in a business climate survey to further examine the culture, goals and context of the business community and how the County can continue to cultivate a profitable environment for its businesses, refer to the Public Engagement section for the survey results.

KEY INDUSTRY SECTORS IN CARROLL COUNTY



Each of these target industries can benefit Carroll County economically, balancing both currently established industries and regional growth sectors. Enhancing the County's economic base will continue

to be pivotal as the County addresses pressing infrastructure issues and limitations and rising costs of municipal services. Thoroughly understanding the development feasibility, infrastructure necessities, and positioning within these industries can help ensure that targeted investment and resource allocation achieves successful and valuable economic growth in Carroll County.

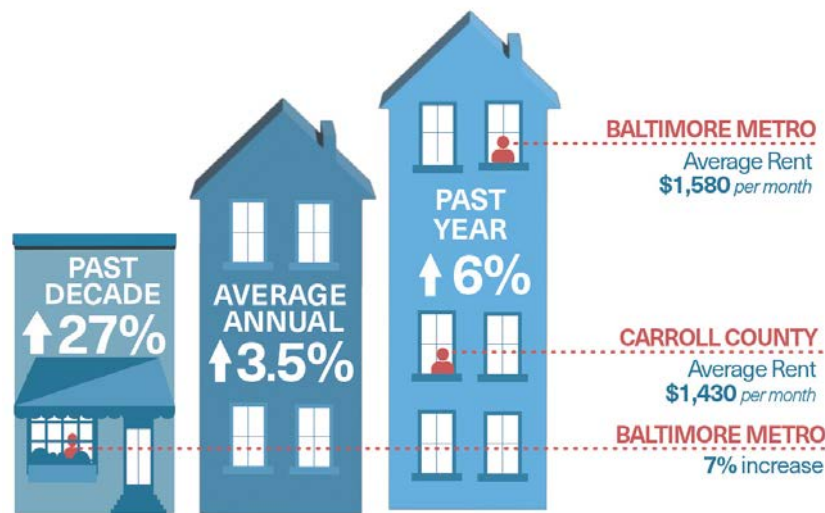
QUICK NOTES

- In 2021, the County's \$5.7 billion GDP constituted nearly 2% of Maryland's GDP.
- While many places, regionally and nationally, faced significant economic upheaval attributable to the COVID-19 pandemic, Carroll County's labor trends over the last five years mirrored or fared better than statewide conditions and areas with high concentrations of office workers.
- Unemployment in the County remains at a 10-year low and below statewide unemployment levels.
- More than 1 out of 10 businesses in Carroll County are within the construction industry.
- 4 of the top 10 employers in the County are within the health care and social assistance industry.
- The professional, scientific, and technical service industry has a strong concentration around Westminster, where several business parks are located (Westminster Technology Park, Carroll County Commerce Center, and Air Business Center).
- Carroll County's top industry sectors by employment mirror the top industries by signifying consistency amongst establishments and employment bases.

Real Estate Market

Carroll County is in the Baltimore-Columbia-Towson MD Metropolitan Statistical Area (MSA), and included in the Washington-Baltimore-Arlington, DC-MD-VA-WV-PA Combined Statistical Area (CSA). It is predominantly rural with a residential character. Its real estate market is small but healthy.

The housing market in the County is currently a seller's market, with higher prices and faster sale times for homes. As for multifamily housing, rents have increased 6% over the past year, significantly exceeding the average annual growth rate of 3.4% over the past decade.



MULTIFAMILY AND RETAIL RENTS

Retail rents in Carroll County have increased 27% over the last decade, far above the 7% average for the Baltimore Metro area, though retail rent prices remain considerably lower than that of the region's average.

Commercial Trends

- Carroll County's **Office Submarket** is midsized and contains around 2.9M square feet of office space. There are no supply-side pressures on vacancy or rent in the near term. There has been no new supply within the submarket in more than five years. The market price, based on the estimated price movement of all office assets in the submarket, sat at \$158 per square foot during the first quarter of 2023. That figure is largely unchanged since last year, and the price itself is below the average for the region. At 8.0%, the market cap rate is within a few basis points of its previous year's levels, and it's similar to the metro average.
- Carroll County's **Industrial Submarket** is midsized and contains around 11.4M square feet of industrial space. The local inventory pool includes square footage for space designed for a specific industrial purpose as well as space designed to suit a variety of industrial uses. Vacancy rates have dipped slightly over the past year. Rents grew by 9.7% over the past 12 months, exceeding the 4.5% average annual change over the past decade. Industrial and logistics space rental prices in Carroll County are moderately below the metro average. These indicators reflect a market with a relatively stable level of demand.
- Carroll County's **Hotel/Hospitality Submarket** is typically seasonal, with occupancy levels peaking during the summer months. The hotel revenue per rented room has largely stabilized to pre-pandemic levels and has experienced minimal year-to-year growth between October 2022 and February 2023. Hotel supply in the County reveals limited hotel product concentrated in DGAs/MGAs, except in Sykesville where there is no available product.

The submarket's hotel inventory has been stagnant over the past three decades with no new large-scale hotels since 1989. There have been two recent projects within the County that market reports indicated were not supported by demand.

- Carroll County's **Retail/Dining/Entertainment Submarket** experienced a year-over-year decline of 23%. Meanwhile, triple-net rents increased 8% year-over-year. Development has been relatively steady over the past few years, adding an average of 31,620 square feet per year between 2020 to 2022. The existing character of Carroll County's downtown core retail spaces will continue to draw inward investment and revitalization as the trend affecting this submarket is to have a smaller footprint than a prototype store. Rents in the submarket grew by 8% over the past 12 months while the Baltimore region experienced a slight decline (-2%) over this same time frame.

QUICK NOTES

- Uses that drive industrial and business economic development are currently allowed in just under 5.25% of county-zoned land.
- Commercial office space in the County is comprised of Class B (49% of the inventory) and Class C (51% of the inventory).
- No new supply of industrial space is currently underway, however, 134K square feet was delivered over the past three years, representing an inventory expansion of 1.1%.
- Hotel supply covers a broad spectrum of classes, with one Economy hotel, one Midscale hotel, one Upper Midscale hotel, and one Luxury hotel. Small bed and breakfast concepts with less than 10 rooms are also provided in the County.
- Nearly 132K square feet of new retail is proposed for delivery within the next eight quarters in Eldersburg, Sykesville, Westminster, and Winfield.
- Business owners cited Carroll County's strong labor force as a major factor in their decision to locate in the County.



Carroll Community College

Image Source: Carroll County Economic Development Department

Growth Scenarios

As Carroll County prepares to draft a new General Development Plan, many decisions will be made about how much and what kind of growth the County will pursue. As a precursor and supporting document to the forthcoming General Development Plan, a series of four growth maps (Scenario A, Scenario B, Scenario C, and Scenario D) provide guidance on the overarching capacity and feasibility of economic growth for years to come.

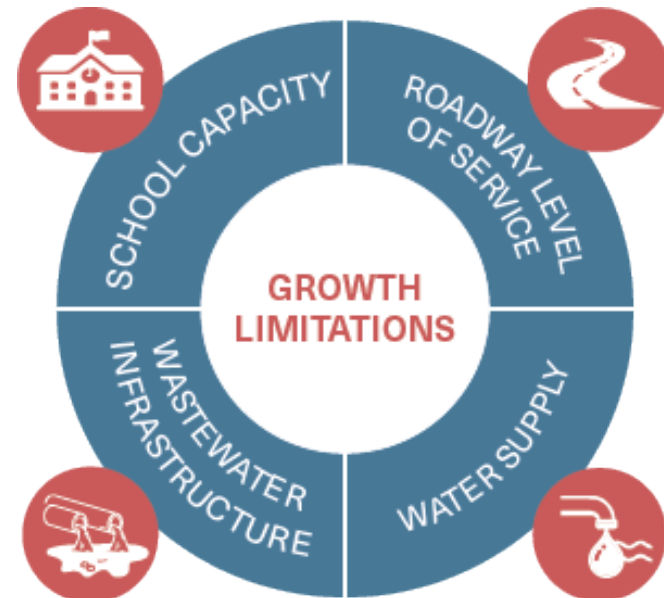
Each growth scenario reflects a level of growth intensity the county could pursue to assess tax revenues, maintain county levels of service, and preserve the high quality of life that residents value. The opportunities and constraints on growth fell into six categories, market demand, market development, land use, infrastructure, fiscal sustainability, and public sentiment.

Overall ideal levels of feasibility for each category fall within a county growth scenario that is aligned most closely to Scenario C. In open house activities and online surveys, the majority of residents and stakeholders stated they would prefer low to moderate growth in Carroll County and appreciate its rural and agricultural setting.



Highlights of Scenario C

- 350K – 550K Average Annual Commercial Absorption (SF)
- 0.8% - 1.2% (approximately 1,360 – 2,000 residents) Population Growth per Year
- Moderately significant changes to existing FLU categories within MGAs/DGAs during updates to the General Development Plan.
- Future expansion of the existing MGAs/DGAs boundaries is likely.
- All MGAs/DGAs will need to be priorities for increased infrastructure capacity.
- The relationship of expenditures to revenues will rise at a more balanced rate, lending towards a low deficit or balanced budget.



Opportunities

As Carroll County looks to the future, proactively targeting key industry sectors can help support expanding the county's industry and employment composition while preserving the attributes and characteristics that have led to Carroll County economic development success.

The County Department of Planning identified vacant parcels that have the potential for future development.

COUNTYWIDE VACANT ZONED LAND FOR ECONOMIC DEVELOPMENT OPPORTUNITIES



Major transportation corridors represent growth opportunities, as these roads are already home to much of the non-residential development in the unincorporated and incorporated portions of the county as well as being prime locations to handle an increase in traffic and activity.

PRIME CORRIDORS FOR GROWTH OPPORTUNITIES



The Priority Greenfield and Redevelopment Matrix, beginning on page 94 of the Study, evaluates relevant, determinant factors to potential development for Industrial and Employment Campus-style development. A total of 31 sites were identified and ranked based on those best suited for those desired development types.

TOP FIVE SITE OPPORTUNITIES

PANK LAND LLC	AVONDALE ROAD	TOWNMALL OF WESTMINSTER	JOHN FROCK SITE	LONG MEADOW FARM (BEATY PROPERTY)
GREENFIELD SITE	GREENFIELD SITE	REDEVELOPMENT SITE	GREENFIELD SITE	GREENFIELD SITE
APPROXIMATELY	APPROXIMATELY	APPROXIMATELY	APPROXIMATELY	APPROXIMATELY
39	82	55	89	118
ACRES	ACRES	ACRES	ACRES	ACRES



Biotechnology

Image Source: Carroll County Economic Development Department

Targeted specific industries for growth can help shift status quo patterns and elicit the types of industries and businesses that continue to make Carroll County a desirable community while ensuring the economic vitality of the County's current businesses and workforce. The following targeted industries may be particularly suitable for expanded growth in Carroll County.

Targeted Industries

- Agricultural Production
- Agricultural Technology (Ag. Tech.)
- Agritourism and Hospitality
- Manufacturing
- Defense Contracting
- Biotechnology
- Research and Development (R&D)
- Small Business Incubation
- Information Technology and Data (IT)
- Drone and Autonomous Logistics

Quick Notes

- The Freedom DGA has the most amount of non-residential developable land, followed by the City of Taneytown.
- The Towns of Hampstead and Manchester contain the most amount of vacant Commercial zoned land.
- The Freedom DGA contains the most amount of vacant Employment Campus zoned land.
- The City of Westminster contains the most amount of vacant Industrial zoned land.
- As of June 2023, a total of 78,281 acres of land have been preserved across four ag.pres programs.
- Farm alcohol producers (FAPs), including wineries, breweries, cideries, and distilleries are seen as a potential economic development driver within the wider Agritourism sector.

Economic Development Toolbox and Resources

- Workforce Development Center
- Small Business Development Center
- Priority and Expedited Reviews
- Impact Fees
- Electronic Review Tracking System
- Community Development Liaison
- Carroll Community College Job Training Certifications
- Maryland Department of Commerce
- Vacant Non-Residential Zoned Land
- Priority Greenfield and Redevelopment Sites
- Targeted Industries

ECONOMIC PROFILE

Given the County's robust economic development efforts and the magnitude of economic development partners and players, this profile highlights insights into Carroll County's economic development ecosystem.

Analytical insights are supplemented and supported through conversations with key regional economic development stakeholders and an assessment of the County's economic assets centered around economic development.

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Introduction

This economic condition analysis of Carroll County provides a baseline understanding of the current conditions, strengths, and opportunities for economic growth in the county. Key economic indicators assessed include an overview of the existing business community and industry composition of the county, employment insights and projections, workforce characteristics and relevant trends, and preliminary industries relevant for the County to consider for targeted sector growth.

Table 1: Regional Population Trends

County	Population 2000	Population 2023	Percent Growth, 2000 – 2023	Average Annual Growth, 2000 - 2023
Carroll County	150,897	175,202	16%	0.68%
Howard County	247,842	342,018	38%	1.40%
Frederick County	195,277	286,449	47%	1.68%
Baltimore County	754,292	859,710	14%	0.57%
Harford County	218,590	266,363	22%	0.85%
Adams County, PA	91,292	104,939	15%	0.62%

Table Source: Jon Stover and Associates, July 2023
 Data Source: Esri Community Analyst

Summary of Population Trends

As shown in Table 1, Carroll County added about 25K residents between 2000 and 2023 for a growth rate of 16% and an average annual growth rate of 0.68%. This rate of growth was similar to, but slightly above Baltimore County and Adams County, PA, two of its immediate geographic neighbors. Three other nearby counties, Howard County, Frederick County, and Harford County, experienced average annual growth rates far above Carroll County at 1.40%, 1.68%, and 0.85%, respectively.

Carroll County has the smallest population of the five neighboring counties within the state of Maryland and is only larger than Adams County, PA, the county north of Carroll County across the Pennsylvania border.

Regional Economic Activity

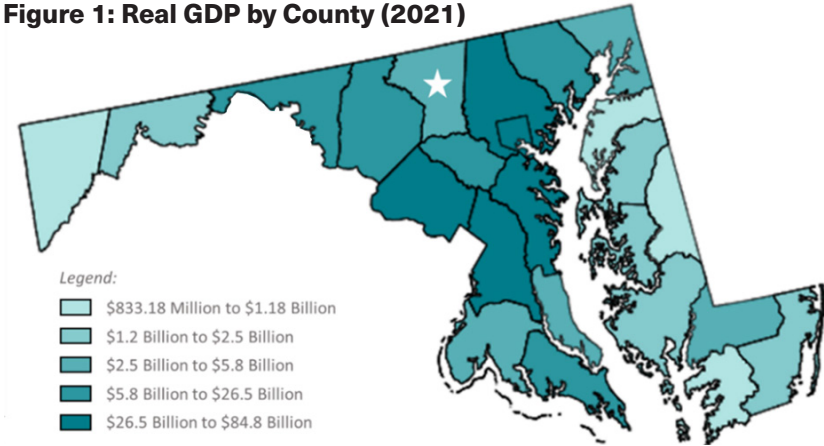
Carroll County is in the top half of the state's counties when comparing overall gross domestic product (GDP), a standard metric for comparing and assessing economic activity. By this metric, Carroll County ranked tenth out of the state's 23 counties. In 2021, the County's \$5.7 billion GDP constituted nearly 2% of Maryland's GDP. Sitting within the western edge of the Baltimore-Columbia-Towson MSA, the County contributes to the broader region while remaining a rural and suburban community contrary to the bustling activity of Frederick, Howard, Harford, and Baltimore Counties.

Table 2: Comparison of Real Gross Domestic Product (GDP) by Peer Counties (2021)

County	Gross Domestic Product (2021)	Share of MSA ¹	Share of State GDP
Carroll County	\$5,774,373,000	3.1%	1.6%
Howard County	\$49,710,537,000	26.8%	13.5%
Baltimore County	\$42,782,920,000	23.1%	11.6%
Harford County	\$12,254,300,000	6.6%	3.3%
Adams County, PA	\$3,504,068,000	n/a ²	n/a

¹ Share of MSA reflective of the Baltimore-Columbia-Towson, MD Metropolitan Statistical Area.
² Adams County's share of state GDP is based on Pennsylvania's GDP and not included in the comparison MSA.
 Table Source: Jon Stover & Associates
 Data Source: US Bureau of Economic Analysis

Figure 1: Real GDP by County (2021)



Note: Star icon designates Carroll County.
 Figure Source: Jon Stover & Associates
 Data Source: US Bureau of Economic Analysis

Businesses and Industries

Over 6,200 businesses call Carroll County home¹. From the County's beloved farmlands and agricultural production to its small businesses lining downtown Main Streets to leading professional, scientific, and technical service companies, Carroll County's economy is composed of diverse industries that contribute to the County's economic stability. Between businesses that have transpired generations to those celebrating recent ribbon cuttings and grand openings, Carroll County features business efforts that span supporting and retaining existing establishments and targeting specific industry niches that reflect the County's current and opportunistic future. Tucked throughout the County, Carroll County's businesses include entrepreneurs born and raised in Carroll County as well as international companies from Germany, China, and beyond who have opened operations in the county.

¹ Total business count reflects data provided through Data Axle for 2022.

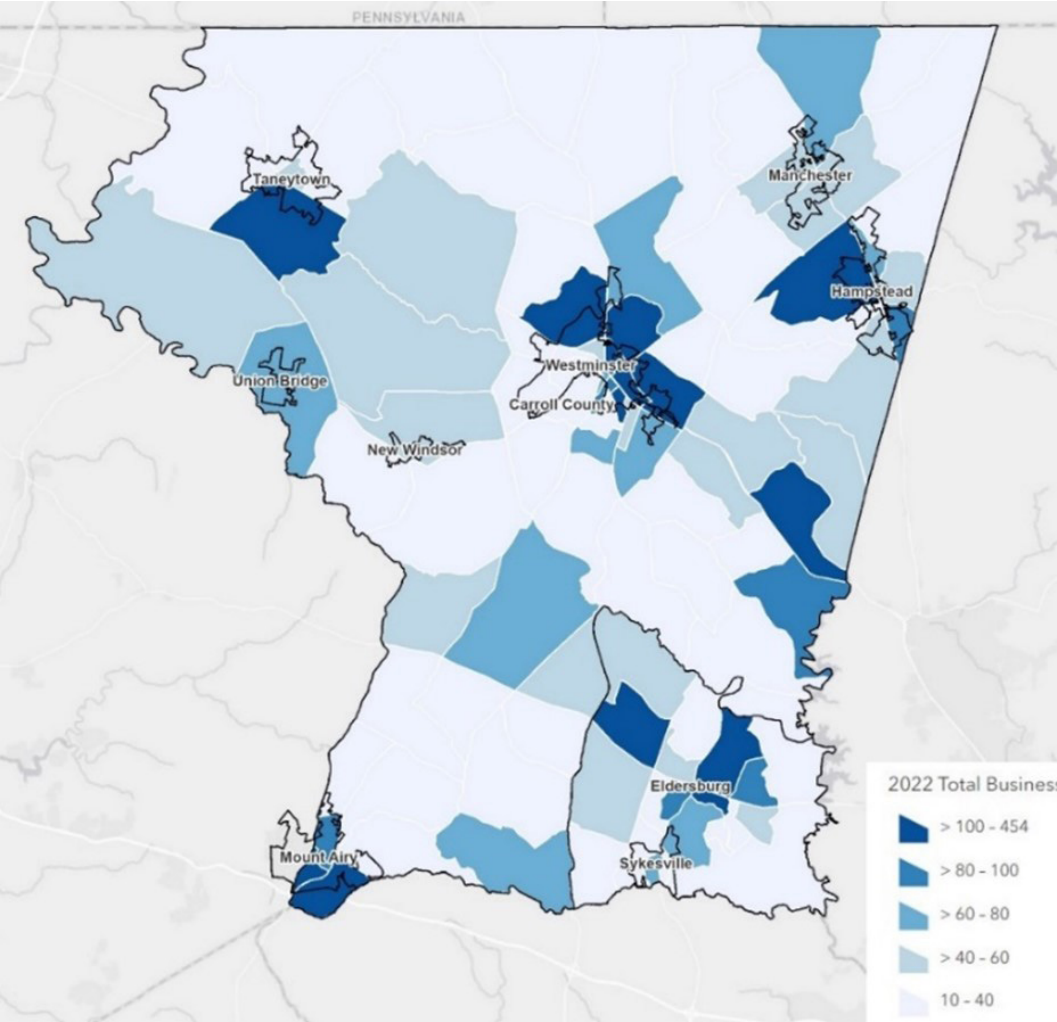
Concentration of Businesses

As shown in Figure 2, Carroll County businesses are primarily located in and near the several municipalities across the County, including Mount Airy, Taneytown, Westminster, and Hampstead, with large swaths of agricultural areas uninhabited by substantial business density.

Overview of Carroll County's Industries

Table 3 lists total establishments by industry sector as classified by the North American Industrial Classification System (NAICS). Carroll County's top five industry sectors, include retailers (13%), service-oriented businesses (13%), construction companies (12%), health care and social assistance establishments (10%), and companies that offer professional, scientific, and technical services (9%).

Figure 2: Concentration of Businesses in Carroll County (2022)



Note: The above map represents business concentration, or the total number of businesses, by Census Block Group.
Figure Source: Jon Stover & Associates
Data Source: ESRI Community Analyst, US Census, Data Axle

Table 3: Total Establishments by Industry Sector (2022)

Industry Sector	Sector Code	Establishments	Industry Share
Retail Trade	NAICS 44-45	784	13%
Other Services Excluding Public Administration ¹	NAICS 81	779	13%
Construction	NAICS 23	731	12%
Health Care and Social Assistance	NAICS 62	608	10%
Professional, Scientific, Technical Service	NAICS 54	567	9%
Unclassified Establishments ²	NAICS 99	525	8%
Accommodation and Food Services	NAICS 72	337	5%
Administration and Support and Waste Management and Remediation	NAICS 56	283	5%
Finance and Insurance	NAICS 52	253	4%
Real Estate and Rental and Leasing	NAICS 53	232	4%
Manufacturing	NAICS 31-33	197	3%
Wholesale Trade	NAICS 42	181	3%
Public Administration	NAICS 92	177	3%
Educational Services	NAICS 61	154	2%
Arts, Entertainment, and Recreation	NAICS 71	131	2%
Information	NAICS 51	98	2%
Transportation/Warehouse	NAICS 48-49	93	1%
Agriculture, Forestry, Fishing, and Hunting ³	NAICS 11	50	1%
Management of Companies and Enterprises	NAICS 55	26	0.4%
Mining	NAICS 21	5	0.1%
Utilities	NAICS 22	3	0.0%

¹Other services include the repair and maintenance industry; personal and laundry services; religious, grantmaking, civic, professional, and similar organizations, and employed workers such as gardeners, caretakers, and other maintenance workers.

²Unclassified establishments defined as businesses yet to report a designated NAICS code, often newer businesses.

³Total agriculture, forestry, fishing, and hunting establishments as recorded by NAICS code through leading data provider Data Axle. USDA's most recently conducted Agricultural Census reported 1,174 farms within Carroll County. Additional data and insights into these agricultural uses are detailed in the below key industry section.

Table Source: Jon Stover & Associates

Data Source: ESRI Community Analyst, Data Axle (2022)

Key Industry Sectors

Carroll County's key industries include historically stable industries, such as health care and social assistance and professional services, and sectors that can be more volatile and responsive to economic swings, like construction and retail industries. Insights into each of the key industries in the County are detailed in the following subsections, offering supplemental information about the current industry composition of Carroll County.

Construction Industry

More than 1 out of every 10 businesses in Carroll County are within the construction industry, and nearly 6,200 people are employed or 12% of the County's total employment, within this industry. The industry has a location quotient of 2.13 within the County, meaning there is a slightly higher concentration of construction businesses compared to the national average. Businesses in the residential building construction sector and building equipment contractors make up more than half (55%) of all construction businesses in the County.



Carroll County Career and Technology Center Construction
Image Source: Brian Krista, Carroll County Times

Table 4: Composition of Construction Industry in Carroll County Compared to the State (2022, Q3)

Construction Industry Sector	Sector Code	Share of Overall Sector in Carroll County	State Sector Composition
Residential Building Construction	NAICS 2361	27%	26%
Nonresidential Building Construction	NAICS 2362	5%	8%
Utility System Construction	NAICS 2371	2%	2%
Land Subdivision	NAICS 2372	n/a ¹	0.5%
Highway, Street, and Bridge Construction	NAICS 2373	2%	1%
Other Heavy and Civil Engineering Construction	NAICS 2379	n/a ¹	1%
Building Foundation and Exterior Contractors	NAICS 2381	12%	10%
Building Equipment Contractors	NAICS 2382	28%	25%
Building Finishing Contractors	NAICS 2383	11%	14%
Other Specialty Trade Contractors	NAICS 2389	12%	11%

¹ The US Bureau of Labor Statistics did not report any establishments in Carroll County for NAICS 2372 and 2379.

Table Source: Jon Stover & Associates

Data Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Health Care and Social Assistance Industry

Approximately 608 establishments and nearly 8,500 employees or 10% of the County's total employment, are within the health care industry. Industry distribution across health care sectors reflects the statewide industry composition. This is further reflected by a location quotient of 1.14, indicating that the industry size reflects national averages. Four of the County's top 10 employers (Carroll Hospital Center, Springfield Hospital Center, Intergrace – Fairhaven, and Carroll Lutheran Village) are within this industry, contributing to the high concentration of health care industry jobs in Westminster and in the Sykesville and Eldersburg areas.

Table 5: Composition of Health Care and Social Assistance Industry in Carroll County Compared to the State (2022, Q3)

Health Care and Social Assistance Industry Sector	Sector Code	Share of Overall Sector in Carroll County	State Sector Composition
Offices of Physicians	NAICS 6211	24%	25%
Offices of Dentists	NAICS 6212	16%	23%
Offices of Other Health Practitioners	NAICS 6213	15%	14%
Outpatient Care Centers	NAICS 6214	7%	7%
Medical and Diagnostic Laboratories	NAICS 6215	6%	5%
Home Health Care Services	NAICS 6216	3%	5%
Other Ambulatory Health Care Services	NAICS 6219	1%	2%
Nursing Care Facilities (Skilled Nursing Facilities)	NAICS 6231	2%	2%
Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	NAICS 6232	5%	4%
Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	NAICS 6233	7%	3%
Other Residential Care Facilities	NAICS 6239	2%	1%
Individual and Family Services	NAICS 6241	6%	9%
Community Food and Housing, and Emergency, and Other Relief Services	NAICS 6242	1%	1%
Child Care Services	NAICS 6244	7%	7%

Table Source: Jon Stover & Associates
 Data Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Figure 3: Concentration of Carroll County’s Health Care and Social Assistance Businesses (2022)

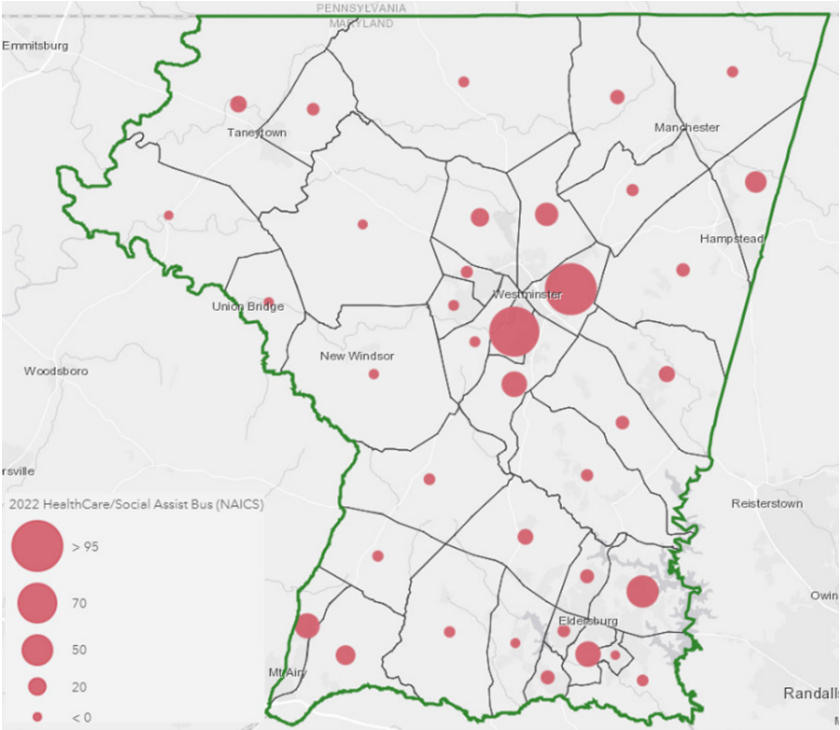


Figure Source: Jon Stover & Associates
 Data Source: ESRI Community Analyst, Data Axle

Professional, Scientific, and Technical Service Industry

The professional, scientific, and technical service industry is one of the largest sectors for employment within Carroll County, with 567 firms operating and employing nearly 3K people within the County. This industry comprises 9% of the County's total employment. The industry has a location quotient of 0.75 within the County, slightly lagging the expected amount of these businesses but unsurprising given the broader regional attraction of this industry to nearby counties. As displayed in Figure 4, professional businesses have a particularly strong concentration around Westminster, the County Seat, where there are several business parks including the Westminster Technology Park, the Carroll County Commerce Center, and the Air Business Center.

Figure 4: Concentration of Carroll County's Professional, Scientific, and Technical Services Businesses (2022)

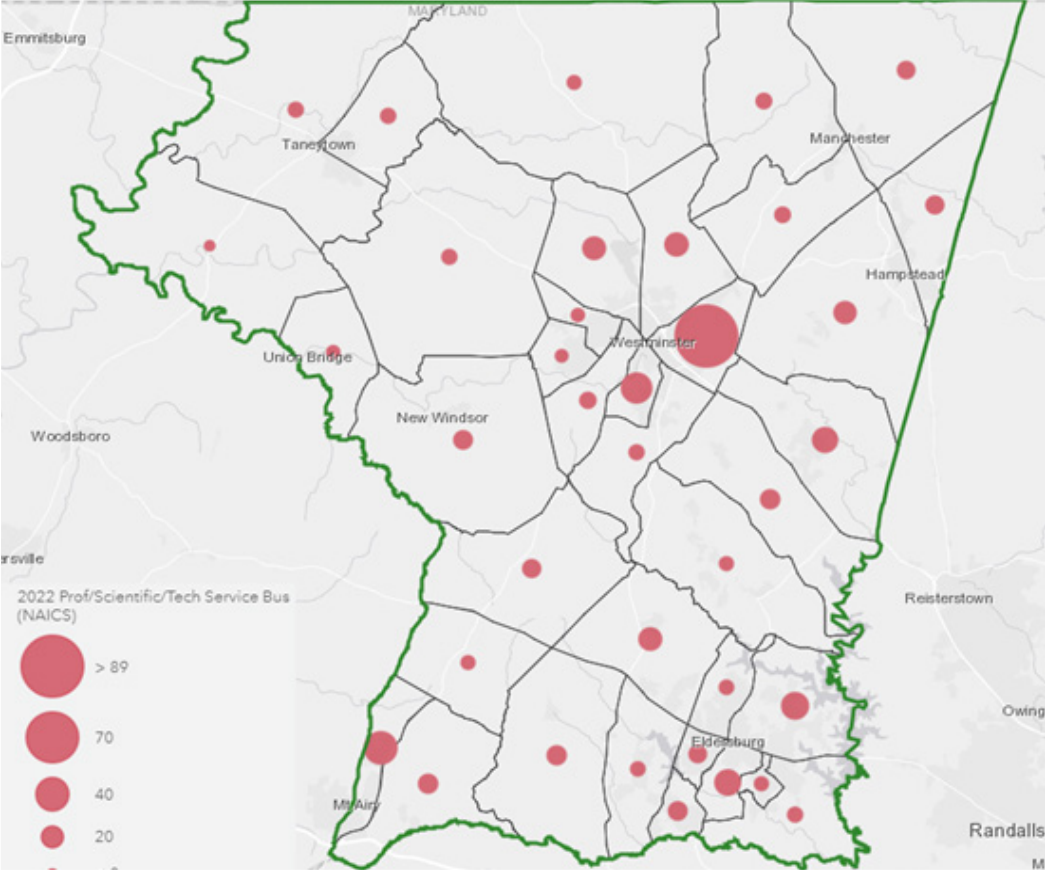


Figure Source: Jon Stover & Associates
Data Source: ESRI Community Analyst, Data Axle

Retail Trade Industry

Carroll County’s retail industry is represented by both small-scale retailers lining the streets of the County’s historic downtowns to traditional mall shopping at the TownMall of Westminster and shopping centers like Eldersburg Commons, Finksburg Shopping Center, Hampstead Marketplace, and Shoppes at Meadow Creek, located throughout the County. The industry has a location quotient of 1.27 within the County, indicating a higher-than-average portion of local retail supply. In 2022, Carroll County’s retail sector accounted for approximately \$2.3 billion of business revenue.

Table 6: Composition of Carroll County Retail Industry (2022)

Retail Sectors	Establishments	Share by Employment	Annual Revenue	Share by Revenue
Motor Vehicle and Parts Dealers (NAICS441)	107	14%	\$473,723,000	21%
Furniture and Home Furnishings (NAICS442)	43	3%	\$52,316,000	2%
Electronics and Appliances (NAICS443)	27	1%	\$14,777,000	1%
Building Material, Garden Equipment, and Supply (NAICS444)	69	13%	\$329,761,000	14%
Food and Beverage Stores (NAICS445)	99	18%	\$380,816,000	16%
Health and Personal Care (NAICS446)	89	8%	\$247,913,000	11%
Gas Stations (NAICS447)	18	2%	\$123,482,000	5%
Clothing and Accessories (NAICS448)	42	16%	\$188,877,000	8%
Sports, Hobby, Books, and Music (NAICS451)	57	3%	\$46,661,000	2%
General Merchandise Stores (NAICS452)	61	17%	\$300,667,000	13%
Misc. Store Retailers (NAIC453)	109	6%	\$133,928,000	6%
Non-store Retailers (NAICS454)¹	63	1%	\$16,131,000	1%

¹ Examples of non-store retailers include direct selling establishments and e-commerce.

Table Source: Jon Stover & Associates
 Data Source: ESRI Community Analyst, Data Axle

Agricultural Industry

In the most recently USDA-conducted Agricultural Census conducted in 2017, 1,174 farms spanned Carroll County generating \$110.4M in agricultural product.^{2,3} Approximately two-thirds (66%) of this revenue resulted from crop sales, and one-third (34%) was from livestock, poultry, and products. Approximately 4% of the total agricultural sales in the state of Maryland were attributable to Carroll County's farms, a slightly higher than the proportional rate of Carroll County's land area within the state. Of the total number of farms in Carroll County, 61% are less than 50 acres, signifying a fabric of agricultural facilities of small-scale production farming mixed with large production facilities and farms.

In 2017, 98% of the farms in Carroll County were considered family farms, a farm that is organized as a sole proprietorship, partnership, or family corporation. Family farms exclude farms organized as nonfamily corporations or cooperatives, as well as farms with hired managers.⁴ This is similar to national agricultural trends.⁵ Approximately 1 out of every 10 farms (12%) sold directly to consumers as part of their operations. The rise in direct-to-consumer (D2C) models in agricultural production have gained popularity and have been noted to support sustainability practices, increase access to fresh food, and support revenue generation for farmers.⁶

² US Department of Agriculture, National Agricultural Statistics Service (2017), a census conducted every five years.

³ This figure reflects the market value of products sold in 2017.

⁴ National Institute of Food and Agriculture, USDA

⁵ USDA reported that family farms constituted 98% of all farms nationally. Source: <https://www.usda.gov/media/blog/2020/01/23/look-americas-family-farms>

⁶ USDA Agricultural Marketing Service Insights

Table 7: Distribution of Carroll County Farms by Acreage (2017)

Carroll County Farms	Establishments	Share of Total Establishments
1 to 9 Acres	260	22%
10 to 49 Acres	456	39%
50 to 179 Acres	284	24%
180 to 499 Acres	112	10%
500 to 999 Acres	37	3%
1,000+ Acres	25	2%

Table Source: Jon Stover & Associates

Data Source: United States Department of Agriculture, National Agricultural Statistics Service



Agriculture Center

Image Source: Carroll County Economic Development Department

Employment

In 2022, a total of 54,197 people were employed within Carroll County. Approximately 86% of the employment in Carroll County is within the private sector, and 14% of the County's jobs are within the government sector, primarily at the local government level, including public schools (11%). The total employment base in Carroll County generated nearly \$768.5M in quarterly wages during the third quarter of 2022.⁷

Table 8: Government and Private Sector Employment (2022, Q3)

Industry Sector	Employment	Share	Total Quarterly Wages
Government	7,843	14%	\$127,130,425
Federal	695	1%	\$18,925,424
State	1,266	2%	\$22,284,643
Local	5,882	11%	\$85,920,358
Private Sector	48,007	86%	\$641,346,049
Total	55,850	100%	\$768,476,474

Note: Employment figures and wages reflective of September 2022.

Table Source: Jon Stover & Associates

Data Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Private Sector Employment by Industry

Carroll County's top industry sectors by employment mirror the top industries by establishments signifying consistency amongst establishments and employment bases. Nearly half (47%) of the private sector employment in Carroll County is within the health care and social assistance, retail trade, and construction industry sectors. Two out of every three private sector jobs in Carroll County are within the county's top five industries by employment base.

⁷ Full annual employment wages unavailable for 2022 at the time of this report.

Table 9: Carroll County Private Sector Employment by Industry (2022, Q3)

Industry Sector	Sector Code	Employment	Total Quarterly Wages
Health Care and Social Assistance	NAICS 62	8,491	\$117,699,753
Retail Trade	NAICS 44-45	7,893	\$70,633,652
Construction	NAICS 23	6,135	\$100,907,327
Accommodation and Food Services	NAICS 72	5,098	\$30,525,349
Manufacturing	NAICS 31-33	3,652	\$65,516,706
Wholesale Trade	NAICS 42	3,159	\$53,851,314
Administrative and Support and Waste Management and Remediation Services	NAICS 56	3,107	\$38,503,832
Professional, Scientific, and Technical Services	NAICS 54	2,797	\$61,925,304
Other Services (Except Public Administration)	NAICS 81	2,081	\$23,644,632
Educational Services	NAICS 61	1,228	\$12,781,989
Arts, Entertainment, and Recreation	NAICS 71	1,022	\$5,010,817
Transportation and Warehousing	NAICS 48-49	990	\$11,544,481
Finance and Insurance	NAICS 62	951	\$28,867,389
Real Estate and Rental and Leasing	NAICS 53	440	\$5,899,734
Information	NAICS 51	231	\$4,471,928
Management of Companies and Enterprises	NAICS 55	123	\$1,364,433
Utilities	NAICS 22	78	\$1,866,853

Note: Employment figures and wages reflective of September 2022.

Table Source: Jon Stover & Associates

Data Source: US Bureau of Labor Statistics

Top Employers in Carroll County

Table 10: Top 10 Employers in Carroll County by Employment Base (2022)

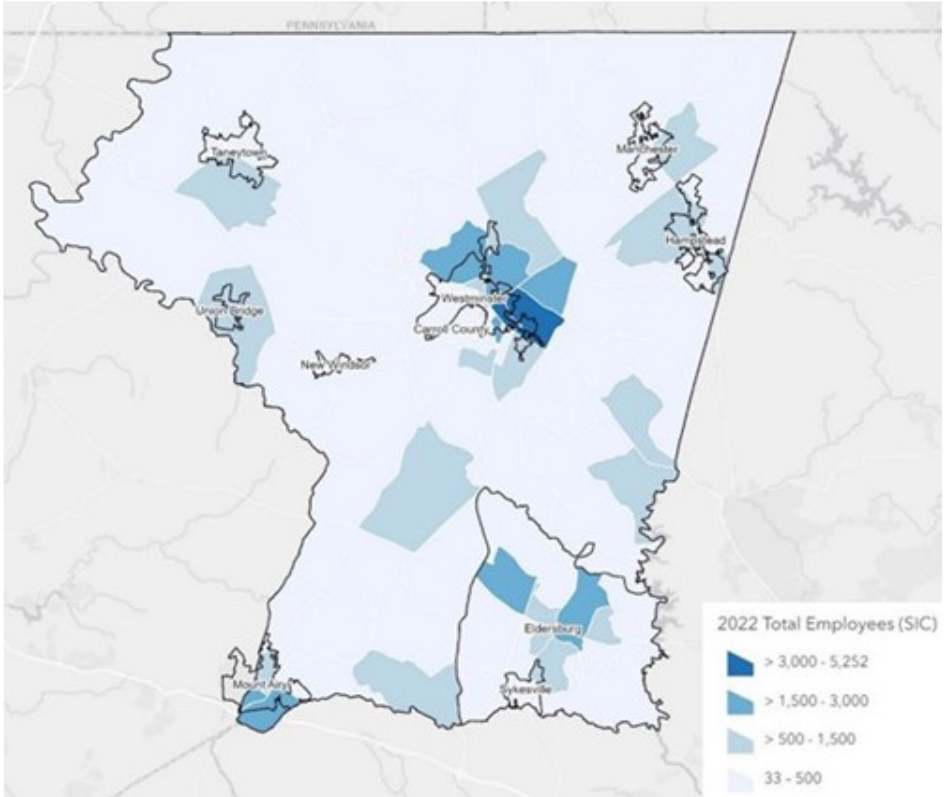
Employer	Industry Sector
Board of Education of Carroll County	Education
Carroll Hospital Center	Health Care
Springfield Hospital Center	Health Care
McDaniel College	Education
Penguin Random House, Inc.	Warehousing
Intergrace – Fairhaven	Retirement Living
Carroll County Government	Government
Carroll Community College	Education
EVAPCO	Manufacturing
Carroll Lutheran Village	Retirement Living

Table Source: Jon Stover & Associates
 Data Source: Carroll County, Maryland Financial Report

Concentration of Employment

While businesses are broadly clustered in and around the municipalities in Carroll County, employment in the County is heavily concentrated east of Westminster, with other concentrations around Mount Airy and in Eldersburg. It should be noted that a portion of this development in Mount Airy is located within Frederick County. Similarly, the County's vast agricultural land distribution contributes to the concentration of employment predominately in select key areas of the County.

Figure 5: Concentration of Employment in Carroll County (2022)



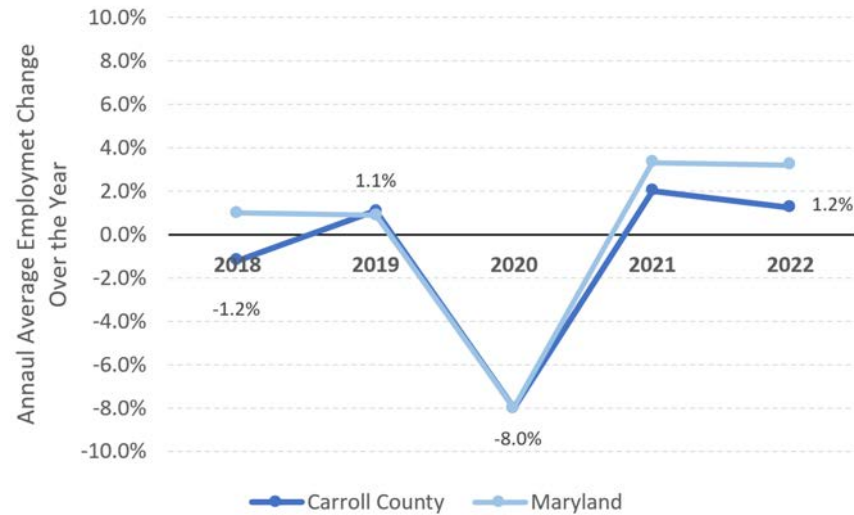
Note: The above map represents employment, or the total number of employees, by Census Block Group.
 Figure Source: Jon Stover & Associates
 Data Source: ESRI Community Analyst, US Census, Data Axle

Annual Employment Trends

Overall, employment in Carroll County remains stable without significant or dramatic swings in the County's cumulative employment base over the past five years. While the total private sector employment did see a slight decline in 2020, this trend mirrored the state. Both Carroll County and the state of Maryland experienced an 8% decline in total private sector employment from 2019 to 2020, as shown in Figure 6, Private Sector Employment Annual Rate of Change and Figure 7, Annual Average Private Sector Employment. This decline is unsurprising given the economic disruptions of the COVID-19 pandemic, yet the county fared better than other areas.



Figure 6: Private Sector Employment Annual Rate of Change (2018 - 2022)

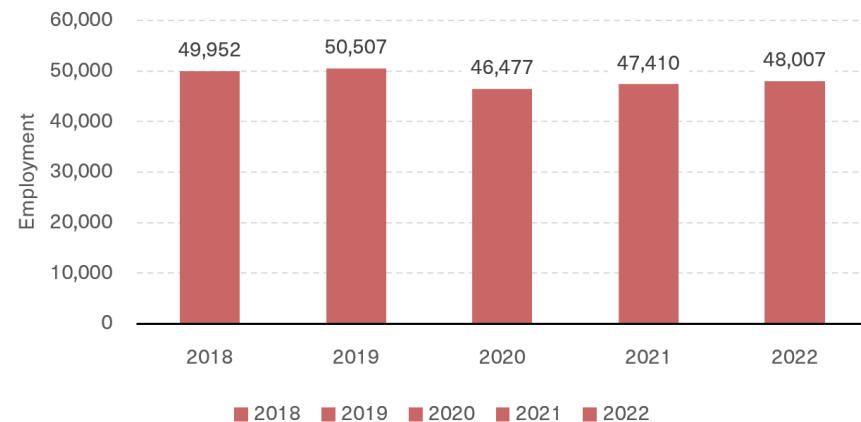


Note: 2022 data reflects BLS provided estimates in September 2022.

Figure Source: Jon Stover & Associates

Data Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Figure 7: Annual Average Private Sector Employment (2018 - 2022)



Note: 2022 data reflects BLS-provided estimates in September 2022. Actual 2022 annual average private sector employment figures may vary.

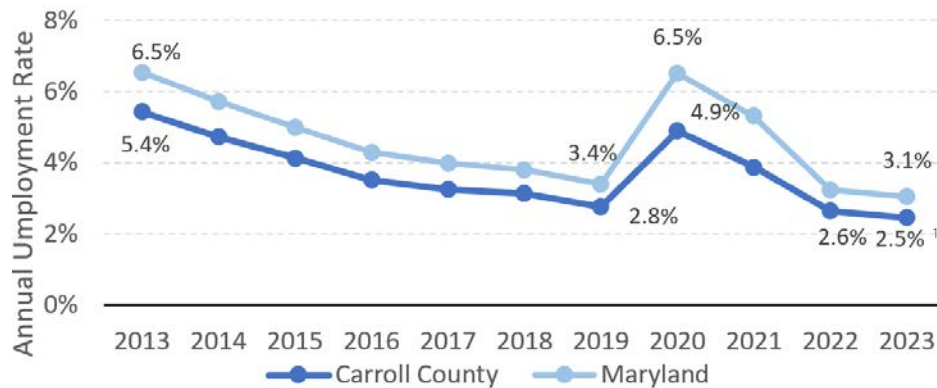
Figure Source: Jon Stover & Associates

Data Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Unemployment in Carroll County

Over the past 10 years, Carroll County's unemployment rate has remained below the statewide average but mirrored trends. Between 2013 and 2019, unemployment rates in Carroll County declined year to year, from 5% to 3%. The COVID-19 pandemic brought an uptick in unemployment in 2020, with a 2% increase in the unemployment rate. However, this rise in unemployment remained below the state increase, signifying that Carroll County fared better than elsewhere in Maryland during the economic turbulence of 2020. Unemployment in 2022 and the early months of 2023 remain at the lowest rate for the County in the past 10 years.

Figure 8: Annual Unemployment Rates (2013 - 2023)



¹ 2023 data reflects January and February only based on data available at the time of this analysis.

Note: The above data is not seasonally adjusted.

Figure Source: Jon Stover & Associates

Data Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics

Economic Projections

Projecting future economic conditions can help stakeholders and the broader community understand how an economy might grow and change based on broader conditions. Communities commonly leverage employment projections to predict how a place may expand its business and workforce opportunities. This type of analysis, often referred to as projection modeling, simulates past events to develop forecasts for the future. Importantly, economic and employment projections are simply estimated predictions should past growth trends continue. Many assumptions and limitations go into projection modeling, and it's critical to use these insights as a guide of how the status quo may continue.

The economic disruptions occurring worldwide since 2020 demonstrates the unpredictability of economic futures. Significant changes in the macro economy will likely continue to impact actual employment and economic growth in future years. However, based on reputable economic models, Carroll County is expected to continue slight economic growth in the coming years.

Employment Projections

Between 2020 and 2050, the employment base of Carroll County is projected to increase by nearly 11%, according to projections conducted by the Baltimore Metropolitan Council. This increase remains below the region's anticipated 15% employment increase, with substantial growth projected for Harford and Howard Counties.

Table 11: Regional 10-Year Employment Change Projections (2020 – 2050)

Regional Jurisdiction	2020-2030	2030-2040	2040-2050	2020-2050
Carroll County	4.0%	3.2%	3.0%	10.6%
Baltimore County	2.6%	3.8%	2.9%	9.5%
Baltimore City	3.6%	1.4%	2.7%	8.0%
Harford County	7.6%	7.2%	6.7%	23.0%
Howard County	12.3%	10.9%	8.0%	34.5%
Baltimore MSA Region	5.5%	4.8%	3.9%	15.0%

Table Source: Jon Stover & Associates, July 2023

Data Source: Baltimore Metropolitan Council, Cooperative Forecasting Group (2022)

In the coming years, employment in Carroll County is expected to grow by an average of 0.5% annually, as articulated in Table 11, for a total projected increase of 3,600 workers between 2018 and 2028, as articulated in Table 12. Carroll County's key industries are expected to remain the same into the future; industries with the highest projected share of employment growth in the country are highlighted in the same table and include health care and social assistance; professional, scientific, and technical services; accommodation and food services; and construction industries. Notably, retail, the largest source of employment in the County, is expected to remain stable through 2028. Carroll County's diverse base of industries and jobs bodes well for its economic future.

Table 12: Key Industry Employment Projections, Carroll County (2018 – 2028)

Industry Sector	Projected Change in Employment	2030-2040
Construction	629	1.0%
Other Services Excluding Public Administration	101	0.3%
Retail Trade	-10	0.0%
Accommodation and Food Services	678	1.0%
Health Care and Social Assistance	753	1.1%
Educational Services	176	0.3%
Administration and Support and Waste Management and Remediation	161	0.5%
Professional, Scientific, and Technical Service	954	1.1%
All Industries	3,601	0.5%
All Industries	3,601	0.5%

Note: Refer to Appendix D Table A1 of this profile for employment projections for all industries in Carroll County.

Table Source: Jon Stover & Associates

Data Source: Maryland Department of Labor

Workforce Characteristics

The Carroll County business community is appreciative of the County's high-quality workforce, with many business stakeholders citing the labor pool as a key reason for locating their business in Carroll County.⁸ Important workforce characteristics include commuting patterns, current trends and gaps in the workforce, particularly post-pandemic.

Journey to Work

Carroll County includes both those who work close to home and those who travel considerable distance to work. Nearly 40% of Carroll County's workers commute less than 10 miles to their jobs. Approximately 55% of workers commute between 10 and 50 miles. A small percentage of workers, 6%, travel more than 50 miles to their workplace. The next largest counties for commuting are Baltimore County and Frederick County, the counties immediately to the east and west, respectively.

Table 13: Distance Traveled to Work, Carroll County (2020)

Distance Travel to Work (miles)	Count	Share of Workforce
Less than 10 Miles	21,532	39.7%
10-24 Miles	19,129	35.3%
25-50 Miles	10,106	18.6%
Over 50 Miles	3,430	6.3%
Howard County	12.3%	10.9%
Baltimore MSA Region	5.5%	4.8%

Table Source: Jon Stover & Associates
 Data Source: US Census, On the Map

⁸ Conversations based on focus groups and conversations with business owners and county representatives as part of this study.

As shown in Figure 9, Carroll County is a net outflow community, meaning more workers leave the county for work than come in. This is otherwise known as a "bedroom community." Of the total workforce in the county, there are 29,347 who are employed in Carroll County but live outside of it. Approximately 24,850 workers live and work in Carroll County, and 58,096 workers live in Carroll County but work outside of it.

Figure 9: Carroll County Inflow/Outflow Workforce Patterns

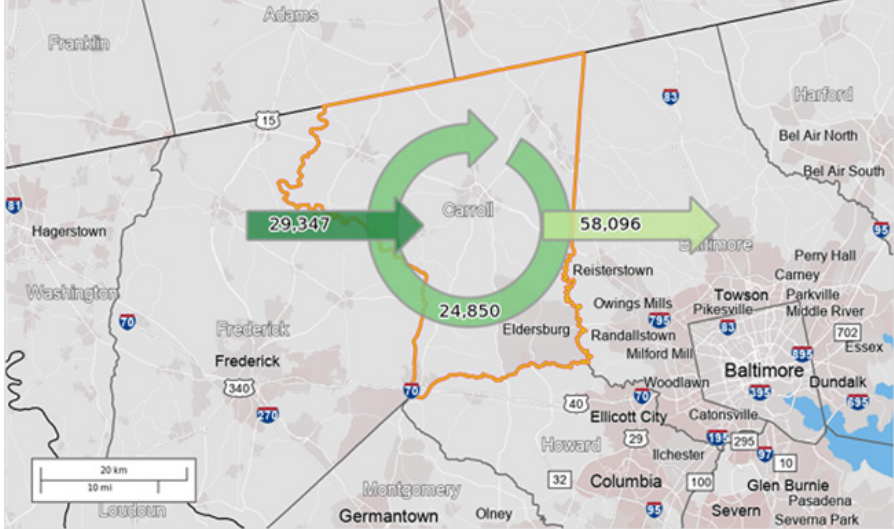


Figure Source: Jon Stover & Associates
 Data Source: US Census, OnTheMap

Figure 10: Where Workers in Carroll County Live

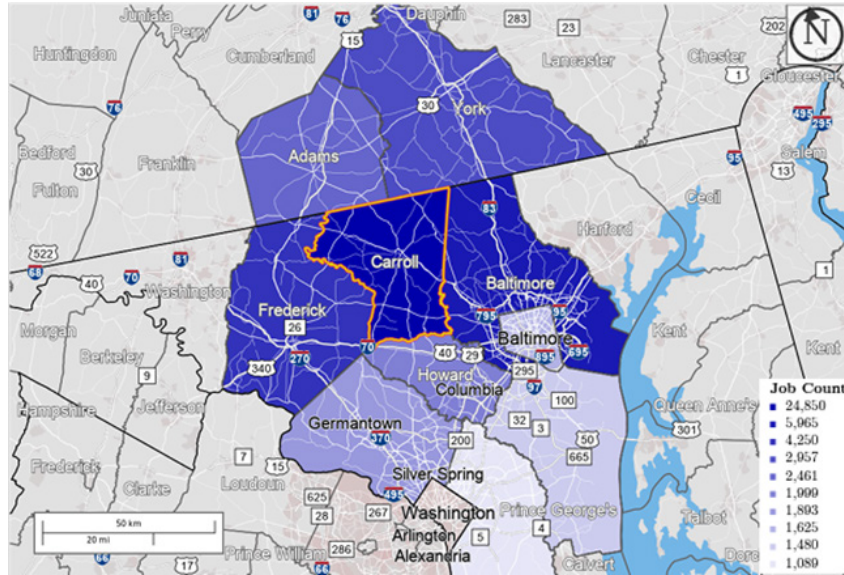


Figure Source: Jon Stover & Associates
Data Source: US Census, OnTheMap

Figure 10 displays the home origin for those who work in Carroll County. A significant number of employees in Carroll County live in neighboring Baltimore and Frederick Counties, while others live across the Pennsylvania border in Adams and York Counties. A small share of workers come from as far as Montgomery and Prince George's Counties and the DC Metro area to work in Carroll County.

Figure 11: Where Carroll County Residents Travel to Work

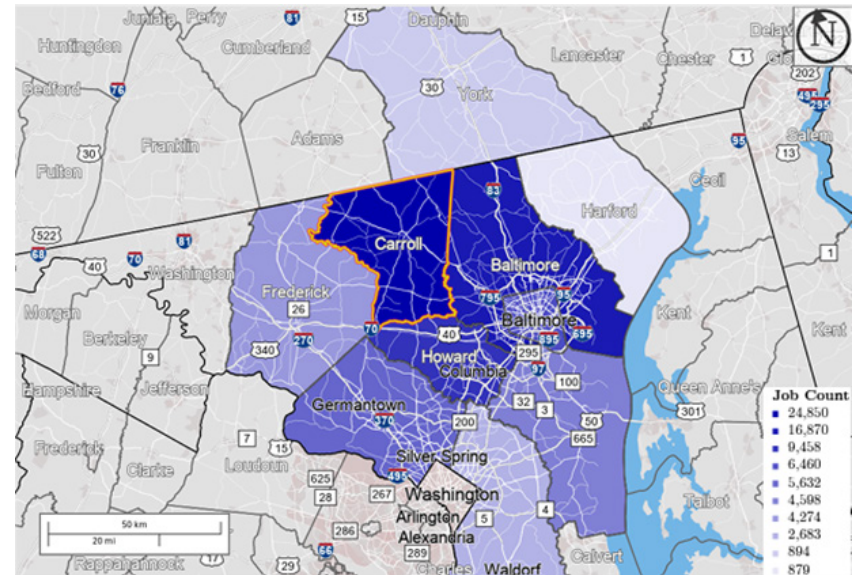


Figure Source: Jon Stover & Associates
Data Source: US Census, OnTheMap

Figure 11 displays the destinations for the Carroll County residents and where they work. A significant number of Carroll County residents work in neighboring Baltimore and Howard Counties, while others work in Frederick County or across the Pennsylvania border in York County. A limited number of Carroll County residents work in Montgomery and Prince George's Counties within the DC Metro Area, as well as Anne Arundel County.

Relevant Workforce Trends and Gaps

Among Carroll County's age 16 and over population of 141,848, approximately 92,395 are employed for a labor force participation rate of 67% and an employment-to-population ratio of 65. Among prime-age workers (ages 25 to 54), the labor force participation rate is 86%, and the employment-to-population ratio is 84. Carroll County's labor force participation rate slightly exceeds the Baltimore-Columbia-Towson MSA in all age cohorts.⁹

Table 14: Carroll County Labor Force Profile (2022)

Age Cohort	Population	Employed	Unemployed	Unemployment Rate	Labor Force	Employment – Population Ratio
16+	141,848	92,395	2,861	3.0%	67.2%	65
16-24	18,175	10,400	1,139	9.9%	63.5%	57
25-54	64,990	54,631	1,422	2.5%	86.2%	84
55-64	26,054	19,443	224	1.1%	75.5%	75
65+	32,629	7,921	76	1.0%	24.5%	24

Note: The labor force data reflects Carroll County residents of workforce age. Labor force includes those who work in Carroll County as well as those who travel outside of the county for work.
 Source: Jon Stover & Associates
 Data Source: ESRI Community Analyst, Civilian Labor Force Profile

Relevant National Workforce Trends and the Workforce Gap

Spurred by the COVID-19 pandemic, the so-called "Great Resignation" significantly impacted the American workforce over the past several years. In October 2022 alone, nationally, more than 4M Americans quit their jobs, leaving over 10M positions open. This is particularly acute in lower-paying jobs and industries.¹⁰

The national labor market is experiencing sizable challenges in workforce recruitment and hiring. Nationally, companies in industries such as retail and construction, two predominant industry sectors in Carroll County, are having difficulty finding applicants. As such, a new trend is emerging where employers focus more on employees' specific skills rather than previous employment history. In response to hiring challenges, companies are shifting focus on upskilling employees to close skills gaps, requiring a new set of tools and resources to implement. The importance of soft skills, such as critical thinking, creativity, and problem-solving, that waned during the pandemic's peak is now again highly sought after and in demand.

Notably, the workforce impacts of the COVID-19 pandemic were particularly acute to women. Nationally, nearly 1.8M women dropped out of the labor force, with only 2 out of every 3 women planning to return to the workforce post-pandemic.¹¹ Shifting roles to the home and challenges with and the affordability of childcare are commonly cited as the leading rationale for this lack of return.

⁹ Labor force participation rate in the Baltimore-Columbia-Towson, MD MSA includes 65% for ages 16+, 61% for ages 16-24, 84% for ages 25-54, 70% for ages 55-64, and 23% for ages 65+. Source: ESRI Community Analyst; Civilian Labor Force Profile
¹⁰ Source: <https://emeritus.org/blog/the-future-of-work-workplace-trends/>
¹¹ Source <https://chronus.com/blog/workplace-trends-on-post-pandemic-rise>

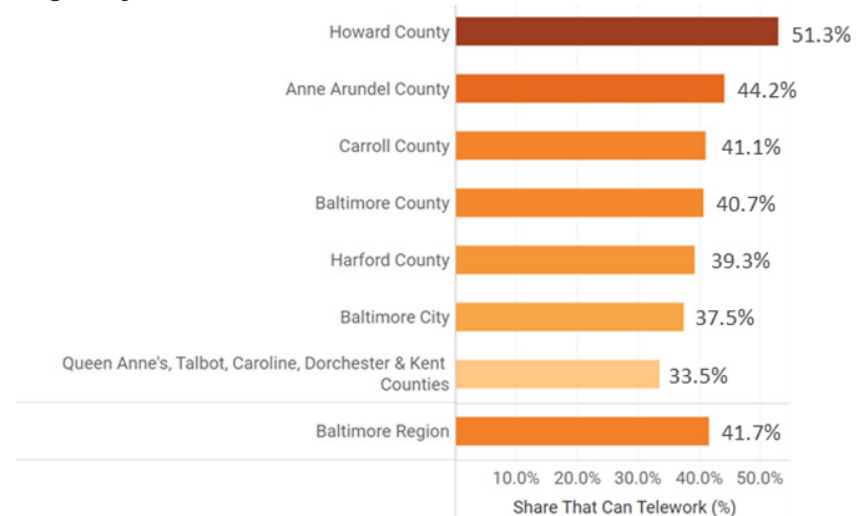
Remote Work Trends

Since 2020, the rise of remote work that occurred nationally and within the broader region affected businesses and workers in Carroll County. According to the American Community Survey, as of 2019, there were 5,933 remote workers in Carroll County. By 2021, there were 19,769 remote workers, an increase of 233%. This substantial increase in remote workers will continue to broadly affect the County's economy as now 21.3% of workers are remote, particularly in industries oriented towards traditional office environments. National early industry projections speculate a decline in office square footage per worker should remote work and hybrid work structures continue as anticipated. However, while remote workers will require less traditional office space, they will have the same demands for housing and infrastructure, such as broadband access, as residents.

Additionally, as people work from home rather than at their offices, the geographic distribution of where people spend money also shifts with increases in spending closer to home for remote workers. Post-pandemic, the national workforce continues to prioritize the option to work remotely at least one day per week or fully remotely. Recent studies show evidence of higher job satisfaction with this enhanced flexibility. With remote work much more commonplace, companies are investing in systems their workers need for these new flexible work environments.¹² Carroll County has invested in broadband infrastructure in support of this.

Approximately 41% of workers in Carroll County are estimated to be eligible for telework.¹³ This mirrors the overall Baltimore region and exceeds counties more reliant on in-person service industries.

Figure 12: Regional County Comparison of Estimated Telework Eligibility



Note: Standard Occupational Classification (SOC) telework eligibility estimates are based on research published through the University of Chicago.¹⁴

Figure Source: Jon Stover & Associates

Data Source: Baltimore Metropolitan Council, Telework Eligibility County Comparison

¹² Source: <https://www.businessnewsdaily.com/8156-future-of-remote-work.html>

¹³ Telework eligibility assumed due to employment industry sectors.

¹⁴ Estimates based on "How Many Jobs Can be Done at Home?" Jonathan I. Dingle and Brent Neiman April 2020. https://bi.uchicago.edu/wp-content/uploads/BFL_White-Paper_Dingle_Neiman_3.2020.pdf

Key Economic Development Infrastructure and Resources

Carroll County offers a strong base of economic development infrastructure and resources for businesses and employers and workforce development resources to support economic development in the County. The longstanding and well-regarded Carroll County Department of Economic Development has actively enhanced the County's economic base through tangible actions and robust partnerships, such as in high tech manufacturing. Notably, the County does not offer payment in lieu of taxes (pilot) programs or tax breaks to incentivize business locations in the county. The County's existing economic development tools prioritize serving the economic goals of Carroll County, such as expanding the tax base, prioritizing business attraction and retention, preserving agricultural character, and helping to maintain Carroll County as a viable community to live and work in. The information following highlights just a few of the key economic development infrastructure and resources in the County, articulating some of the many programs and resources contributing to the economic development success in Carroll County.

Key Economic Development Resources in Carroll County

Greater Baltimore Committee

The Greater Baltimore Committee (GBC) is a regional marketing arm representing over 500 businesses, nonprofits, foundations, and leading education and civic institutions. The GBC markets the region's economic assets and opportunities while promoting the Greater Baltimore area. It should be noted that the GBC and Economic Alliance recently merged and the role of this group in the region is being revisited.

Small Business Development Center

The Small Business Development Center (SBDC) is an economic development agency that provides resources to help small businesses within Carroll County as part of a statewide and national network of small business support. The SBDC offers free and low-cost guidance for entrepreneurs and small businesses in Carroll County through one-on-one support, technical assistance, workshops, and training programs.

Carroll County Office of Tourism

Carroll County Office of Tourism (Carroll County Tourism) focuses on regional tourism efforts, marketing Carroll County and its experiences to visitors. Key assets include the County's 10 historic districts, Main Streets, Carroll Arts Center, Civil War Driving Tour, Maryland Wine Trail, Carroll County Barn Quilt Trail, outdoor recreation opportunities, Maryland Wine Festival, Carroll County Farm Museum, and much more. Tourism to Carroll County brings visitor spending to the local business community.

Carroll County Chamber of Commerce

Since 1924, the Carroll County Chamber of Commerce has worked to improve the County's economic vitality and business community. With over 500 members, the chamber provides business-to-business networking, resources, and marketing and promotion opportunities for businesses. Recently, the Chamber of Commerce expanded its programming to offer specific events for women-owned businesses in Carroll County.

Carroll Technology and Innovation Council

The Carroll Technology and Innovation Council (CTIC), formed in 2001, focuses on advancing technology and business innovation within the County. CTIC works on helping increase access to higher-paying tech jobs in the County while also advocating for increased technology access in households throughout the County. CTIC collaborates with strategic partners, including the Carroll Community College; Mid-Atlantic Gigabit Innovation Collaboratory, Inc. (MAGIC); Carroll County's Department of Economic Development; and CCTechHire.

Carroll County Broadband

Carroll County has continued to prioritize major investments in broadband infrastructure to underserved areas and since 2007, has invested \$15.6M to complete needed infrastructure targeted for 2025. As of April 2023, an additional \$22.5 million has been granted to county Internet Service Providers (ISPs) in cooperation with the State of Maryland and private ISPs. The County's end goal is to provide reliable coverage and close the "Digital Divide" to all areas with respect to

natural limitations. To champion these efforts, the County has appointed a Broadband Project Manager to coordinate future expansion efforts to residents.

Westminster Fiber Optic Network

As the Mid-Atlantic's first community-wide gigabit fiber network, the City of Westminster has been installing and expanding its fiber optic network throughout the community in a multi-phased effort since the original pilot effort launched in 2015.¹⁵ This fiber optic network advances internet speeds in Westminster, an infrastructure investment particularly valuable as shifts in remote trends accelerated over the past few years. MAGIC, a nonprofit organization based in downtown Westminster, dedicates efforts to expanding economic development in Westminster due to the area's fiber optic network, demonstrating the compounding value of this network, and capitalizing on this asset.

Carroll County Workforce Development

Carroll County Workforce Development (CCWD), a division of the County's Department of Economic Development and an office of the Carroll Workforce Development Board, works to expand access to workforce development tools for both employers and potential employees.

Key priorities include helping Carroll County businesses identify hiring needs and matching companies with job seekers, helping Carroll County residents' best market themselves for potential jobs, and providing resources as a one-stop community workforce development center. CCWD's extensive resources and partnerships directly support the County's reputation as an attractive market to do business.

¹⁵ Source: <https://www.westminstermd.gov/419/Westminster-Fiber-Network>

Collegiate Resources and Industry Training

Carroll County Community College and McDaniel College in Westminster are valued community resources that can enhance opportunities for economic development through educational tools and industry training. The County has continued to prioritize these institutions as business partners to expand training and career programming that is responsive to the employment needs of the community. County departments help to provide support to the colleges facilities and utilities management, insurance and health benefits and to provide funding that will ensure these programs and resources are well maintained.



Leveraging Success



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REAL ESTATE MARKET OVERVIEW

The following high-level real estate market overview provides a regional assessment of market conditions based on interviews with local developers and brokers as well as market data provided by private third-party data sources.

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Introduction

The primary market research includes trends data related to residential, retail, hospitality, industrial, and office uses for a range of business sectors. Data collected includes inventory, vacancy rates; sales/lease prices per square foot; emerging/declining sector trends, and pipeline projects (planned/under construction).

The market analysis relies on CoStar data and other primary market research with input from local stakeholders and others via the stakeholder engagement process and real estate interviews.

Residential Market Overview

Home Sales

According to Rocket Homes,¹⁶ Carroll County is a sellers housing market, which means prices tend to be higher and homes sell faster. Homes in Carroll County have sold for 4.9% more than they did a year ago.

Compared to nearby counties, Carroll County's median home prices increased from \$391.5K to \$410.7K (4.9% increase from February 2022 to February 2023), now ranked in the middle of home prices in Frederick, Adams, and Baltimore Counties. There are currently 420 homes for sale in Carroll County, down 4.8% from one year ago (441 homes) with an average sale time of 28 days on the market.

¹⁶ <https://www.rockethomes.com/real-estate-trends/md/carroll-county>

Multifamily Housing

According to CoStar, the vacancy rate in the Carroll County Submarket has slightly risen over the past year, but at 3.2%, is slightly below the long-term average. This statistic is showcased in Table 15 and Figure 13.

There has been a recent new delivery in the county, Westminster Way Apartments. One other property, Abby Place, is under construction. Rents have increased by 6.0% over the past year, which significantly exceeds the average annual growth of 3.4% over the past decade.

Investors have been active in the Carroll County Submarket over the past three years. The market price, which is an estimated price of all properties in the submarket, has risen over that time period and now stands at \$159,453 per unit.

Table 15: Multifamily Market Summary

Real Estate Market Indicators	Carroll County
Total Inventory (Units)	2,510
4 & 5 Star (Class A)	0
3 Star (Class B)	1,919
1 & 2 Star (Class C)	1,319
Units Under Construction	35
12 Mo Net Absorption Units	(34)
Vacancy Rate	3.2%
Effective Market Rent per Unit	\$1,424
12 Mo. Asking Rent Growth	6%

Table Source: Willdan, March 2023
Data Source: CoStar

Figure 13: Carroll County Multifamily Vacancy Rate

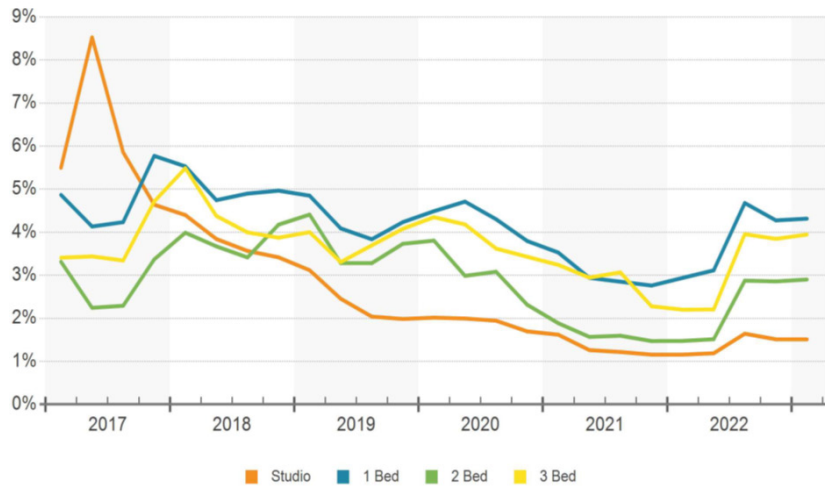


Table Source: Willdan, March 2023
Data Source: CoStar

The Carroll County Submarket has an average rent of \$1,430 per month for a two-bedroom unit, lower than the \$1,580 per month average in the Baltimore Metro.

Rents grew by 6.0% over the past 12 months, below the rate of inflation, but similar to the annualized rate over the past three years, as well.

The Carroll County Submarket has been a rent growth winner over a longer timespan. The average apartment unit rents for 40.5% more today than it did a decade ago, beating out the 33.9% ten-year increase observed in the Baltimore Metro at large.

Figure 14: Effective Rent per Square Foot by Number of Bedrooms

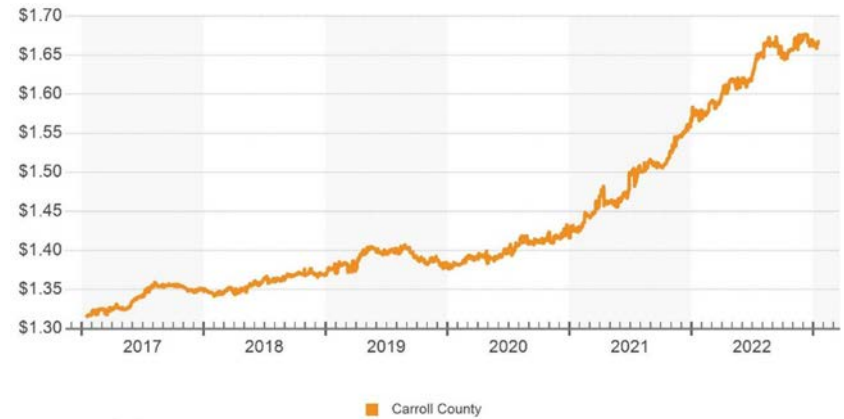


Figure Source: Willdan, March 2023
Data Source: CoStar



Abbey Place Multifamily Complex
Image Source: <https://www.apartments.com/abbey-place-westminster-md/7x5582y/>

Summary of Commercial Trends

Commercial net absorption, as shown in Table 16, encompasses office, retail, industrial, and flex space sectors. Between 2000 and 2023, Carroll County had a net absorption of over 2.8M square feet of commercial real estate space for an average annual net absorption of 220,846 square feet. This rate of growth was below Howard, Frederick, and Baltimore Counties. These counties have larger populations than Carroll County and have experienced more development activity since 2000. Carroll County's net absorption was far above Adams County, PA.

Table 16: Commercial Net Absorption Regional Comparison

	Total Net Absorption, 2010 – 2023 (square feet)	Average Annual Net Absorption, 2010 – 2023 (square feet)
Carroll County	2,871,000	220,846
Howard County	9,009,000	693,000
Frederick County	8,164,000	628,000
Baltimore County	14,498,000	1,115,231
Adams County, PA	971,000	74,692

Figure Source: Willdan, March 2023
Data Source: CoStar

Office Market

The Carroll County Submarket is a midsized submarket that contains around 2.9M square feet of office space. As shown in Figure 15, the vacancy rate has been unchanged over the past year, but at 5.5%, the rate was below the 10-year average as of 2023, Q1.

Net absorption came in at 12K square feet over the past year, slightly above the five-year average. Rents grew by 1.2% over the past year, a modest increase, though below the 10-year average. There are no supply-side pressures on vacancy or rent in the near term, as no new supply is under construction.

There has been no new supply within the submarket in more than five years, including medical offices, but there is a new medical pavilion proposed within the county.

Supply Characteristics

Commercial office space in Carroll County is comprised of Class B and C spaces. Class A is defined within the industry as an extremely desirable investment-grade property with the highest quality construction and workmanship, materials and systems, significant architectural features, and is usually occupied by prestigious tenants. Class B buildings offer more utilitarian space without special attractions and amenities. Class C buildings are typically older, disinvested properties lacking competitive amenities.

Class B space represents 49% of the county's office inventory, with Class C making up the remainder of inventory at 51%.

Demand Drivers

The Carroll County Submarket annual sales volume has averaged \$4.8M over the past five years, and the 12-month high in investment volume hit \$11.5M over that stretch. In the past 12 months, \$4.0M worth of assets were sold.

The market price, based on the estimated price movement of all office assets in the submarket, sat at \$158 per square foot during the first quarter of 2023. That figure is largely unchanged since last year, and the price itself is below the average for the region. At 8.0%, the market cap rate is within a few basis points of its previous year's levels, and it's similar to the metro average. The present rate in the submarket matches the five-year average.

Figure 15: Net Absorption, Net Deliveries and Vacancy (2023, Q1)

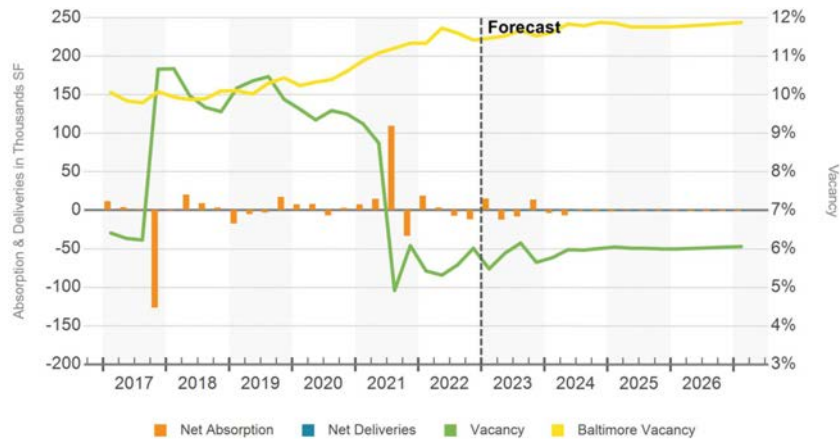


Figure Source: Willdan, March 2023
Data Source: CoStar

As shown in Figure 16, office rents in Carroll County are about \$19.70 per square foot gross, below the metro average. Office space rated 1- and 2-Star costs about \$19.00 per square foot, a bit below the \$21.00 per square foot rate in the metro. Rents grew moderately at 1.2% year-over-year, which while positive, was not much higher than the weakest rate of annual rent growth observed over the past three years.

Figure 16: Carroll County Office Market Rent per Square Foot

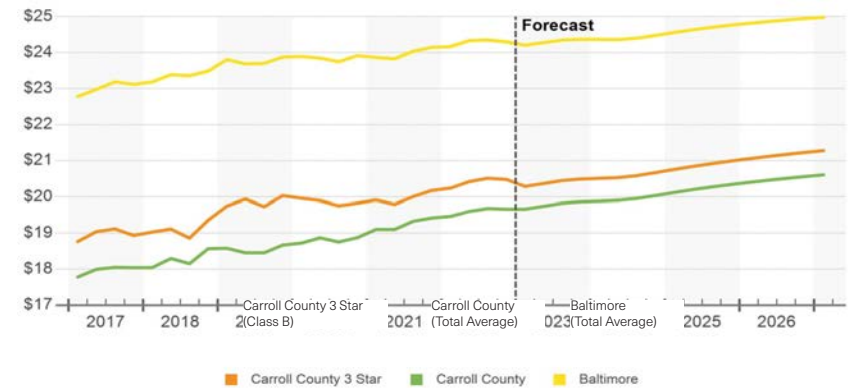


Figure Source: Willdan, March 2023
Data Source: CoStar

Industrial Market

The Carroll County Submarket is classified as mid-sized, containing around 11.4M square feet of industrial space. Similar to the metro, logistics facilities account for the largest proportion of local supply, and these properties contain around 8.2M square feet. The local inventory pool has 1.3M square feet of specialized space, or space designed for a specific industrial purpose, and 2.0M square feet of flex space, or space designed to suit a variety of industrial uses.

Table 17: Industrial Market Summary

Real Estate Market Indicators	Carroll County
Inventory (Square Feet)	11.4M
4 & 5 Star (Class A)	1.8M
3 Star (Class B)	5.9M
1 & 2 Star (Class C)	3.7M
12 Mo Net Absorption (Square Feet)	93.1K
Vacancy Rate	2.1%
Market Rent per Square Foot	\$9.21
12 Mo Rent Growth	9.7%

Table Source: Willdan, 2023, Q1
 Data Source: CoStar

Vacancy rates have dipped slightly over the past year. Net absorption over the past year was about 140K square feet, slightly below the five-year annual average of 160K square feet.

There is no new supply currently underway. Though the pipeline is empty, the submarket has seen recent development. 134K square feet has been delivered over the past three years, representing an inventory expansion of 1.1%.

Supply Characteristics

The Carroll County Submarket annual sales volume has averaged \$22.8M over the past five years, and the annual high in investment volume hit \$28.1M in 2019. In 2022, \$23.0M worth of assets were sold.

The market pricing, based on the estimated price movement of all facilities in the submarket, was \$96 per square foot during the first quarter of 2023. That price has increased since last year, growing by more than 10% (slightly exceeding inflation in that timeframe), although the level is still less than the average price for the region. The market cap rate has contracted over the past year, but it's still higher than the region's average yield.



Strouse Facility
 Image Source: Carroll County Economic Development Department

Figure 17: Carroll County Industrial Space Deliveries, Completed and Proposed

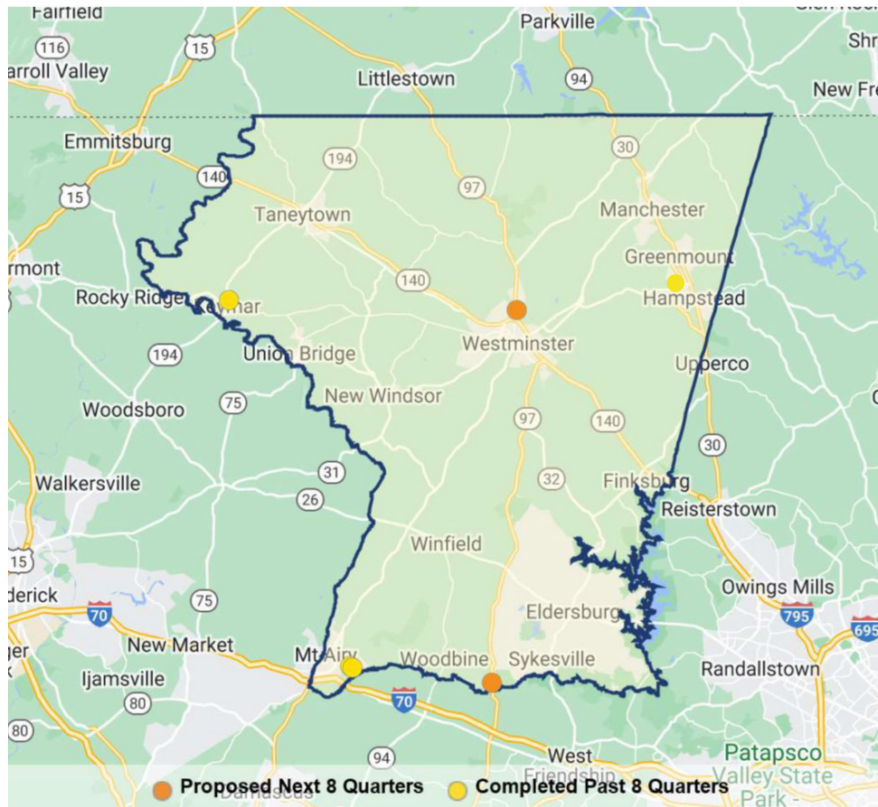


Figure Source: Willdan, March 2023
Data Source: CoStar

Figure 18: Net Absorption, Net Deliveries, and Vacancy

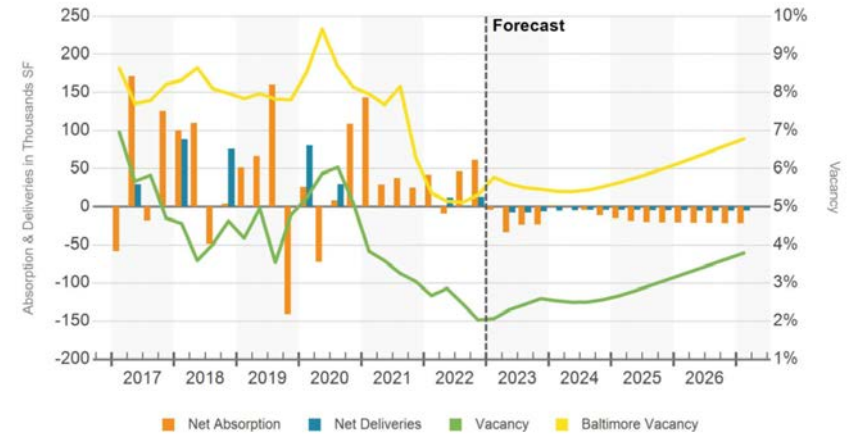


Figure Source: Willdan, March 2023
Data Source: CoStar

Demand Drivers

Industrial rents in Carroll County are about \$9.00 per square foot, below the metro average. A similar pattern holds for logistics space, which at \$8.70 per square foot, rents for less than the \$9.00 per square foot metro average for that subtype. Rents in the submarket posted a gain of 10% over the past 12 months, outpacing the 7.5% annualized average over the past 3 years and slightly above inflation in that timeframe. Industrial rents today are 57.4% higher than they were 10 years ago. Thus, greater than the long-term performance in the metro, where rents cumulatively increased by 54.2% over the past decade. These indicators reflect a market with a relatively stable level of demand.

Figure 19: Carroll County Industrial Market Rents

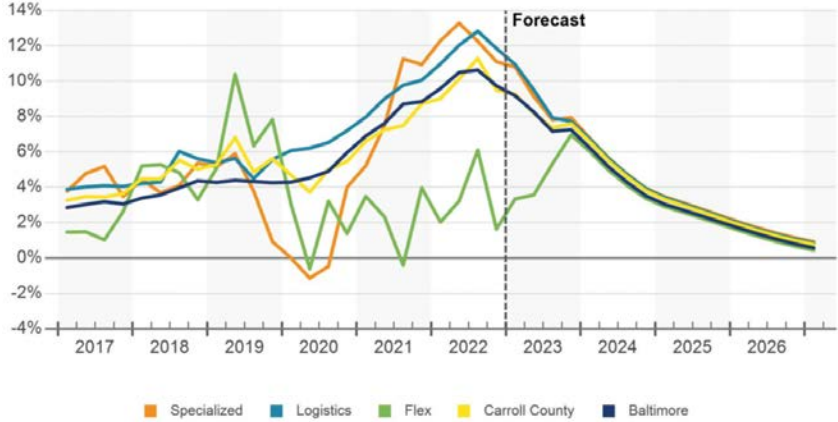


Figure Source: Willdan, March 2023
Data Source: CoStar

Hotel/Hospitality Market

The Carroll County Submarket contains 369 hotel rooms across seven properties. The submarket is typically seasonal, with occupancy levels peaking during the summer months.

The COVID-19 pandemic had a profound impact on the entire U.S. hospitality sector, and the Carroll County Submarket was no exception to this trend. In April 2020, occupancy dropped to 37% and revenue dropped 43.9% compared to April 2019. By February 2021, year-to-year occupancy was still down 22.3%.

However, the county’s hospitality sector experienced strong growth in the first half of 2022, as travel began returning to pre-pandemic levels. RevPAR, or hotel revenue per rented room, experienced consistent growth year-to-year growth throughout 2022, reaching a high of \$65 per room in May 2022. RevPAR in the submarket has largely stabilized

since 2022, Q3 and has experienced minimal year-to-year growth between October 2022 and February 2023.

Supply Characteristics

There are only two franchise hotels (Days Inn and Best Western). Three of the county’s hotels are small bed and breakfast concepts with less than 10 rooms. The remaining supply of traditional hotels concepts cover a broad spectrum of hotel classes, with one Economy hotel, one Midscale hotel, one Upper Midscale hotel, and one Luxury hotel.

Table 18: Carroll County Hotel Market Indicators

Market Indicator	Performance
12 Mo Occupancy	63.5%
12 Mo ADR	\$99.55
12 Mo RevPAR	\$63.24
12 Mo Supply (Rooms Available)	10,024
12 Mo Demand (Rooms Sold)	5,480

Table Source: Willdan, March 2023
Data Source: CoStar

Demand Drivers

While hotel demand is challenged by the ongoing recovery from the COVID-19 pandemic, desktop review of hotel supply in Carroll County reveals limited hotel product concentrated in DGAs/MGAs except in Sykesville where there is no available product. The submarket’s hotel inventory has been stagnant over the past three decades with no new large-scale hotels since 1989. There have been two recent projects within the county that market reports indicated were not supported by demand.

Table 19: Carroll County Hotel Supply (2023, Q1)

Class	Rooms	12 Mo Occ	12 Mo ADR	12 Mo RevPAR	12 Mo Delivered	Under Construction
Luxury and Upper Upscale	49	54.0%	\$211	\$114	0	0
Upscale and Upper Midscale	115	63.1%	\$113	\$71	0	0
Midscale and Economy	205	65.9%	\$72	\$47	0	0
Total	369	-	\$396	\$232	0	0

Average Trend	Current	3 Mo	YTD	12 Mo	Historical Average
Occupancy	54.7%	52.4%	52.7%	63.5%	62.7%
Occupancy Change (YOY)	-4.0%	-2.5%	-2.6%	1.3%	-0.03%
ADR	\$89.53	\$88.46	\$87.95	\$99.55	\$71.42
ADR Change (YOY)	11.8%	13.3%	13.2%	-1.6%	2.2%
RevPAR	\$48.95	\$46.34	\$46.37	\$63.24	\$44.56
RevPAR Change (YOY)	7.3%	10.4%	10.3%	-0.3%	2.4%
RevPAR Change (YOY)	7.3%	10.4%	10.3%	-0.3%	2.4%

Table Source: Willdan, March 2023
Data Source: CoStar

Retail/Dining/Entertainment Market

Vacancies for retail properties in Carroll County were under the five-year average during 2023, Q1 and the county's overall retail vacancy rate experienced a year-over-year decline of 23%. Meanwhile, triple-net rents, or rents where the tenant pays all expenses of the property, increased 8% year-over-year.

Development has been relatively steady over the past few years in Carroll County, adding an average of 31,620 square feet per year between 2020 to 2022. An additional 20K square feet of retail space was delivered in 2023, Q1.

Table 20: Retail Market Summary

Real Estate Market Indicators	Carroll County
Inventory (Square Feet)	8.6M
12 Mo Deliveries (Square Feet)	33.7K
12 Mo Net Absorption (Square Feet)	83K
Vacancy Rate	2.8%
12 Mo Rent Growth	1.33%
Market Rent per Square Foot	\$19.81

Table Source: Willdan, March 2023
Data Source: CoStar

Over the past decade, retail rents in the Carroll County Submarket increased by 27%, above the corresponding 10-year increase in the Baltimore Metro Area (7%). At \$180 per square foot, market pricing is considerably lower than the region's average price of \$212 per square foot.

Supply Characteristics

Retail space with a small footprint, or smaller square footage, is a trend that is affecting supply, with more retailers reducing the footprint of their prototype store. The existing character of Carroll County's

downtown core retail spaces will continue to draw inward investment and revitalization.

Retail tenants should be able to find space in the Carroll County Submarket at somewhat of a discount compared to other parts of the Baltimore Metro Area. Retail space commands \$20 per square foot triple net on average in the submarket, moderately below the \$23 per square foot metro-wide average.

Rents in the submarket grew by 8% over the past 12 months. The Baltimore region experienced a slight decline (-2%) over this same time frame.

Table 21: Key Retail Market Indicators

Current Quarter	RBA	Vacancy Rate	Market Rent	Availability Rate	Net Absorption (Square Feet)	Deliveries (Square Feet)	Under Construction
Power Center ¹⁷	763,731	0.9%	\$27.89	2.5%	0	0	0
Neighborhood Center	2,615,175	4.2%	\$21.97	7.1%	18,612	0	0
Strip Center	373,947	6.6%	\$19.99	15.4%	(1,722)	0	36,925
General Retail	4,286,749	1.6%	\$17.82	2.2%	21,007	20,000	3,000
Other	0	-	-	-	0	0	0
Submarket	8,039,602	3.4%	\$21.91	6.8%	37,897	20,000	39,925

Table Source: Willdan, March 2023
Data Source: CoStar

¹⁷ A Power Center can be referred to as a series of big-box retailers, small-scale retailers, restaurants, and other businesses as part of an outdoor retail center.

Table 22: Retail Market Annual Trends

Annual Trend	12 Mo	Historical Average	Forecast Average	Peak	When (Year)	Trough	When (Year)
Vacancy Change (YOY)	-0.2%	5.3%	0%	68%	2009	-33%	2022
Net Absorption (Square Feet)	86K	33K	34K	156,325	2015	-307,944	2014
Deliveries (Square Feet)	36.7K	62K	52K	339,601	2015	0	2017, 2019
Rent Growth	8%	1.4%	1.5%	3.6%	2022	-0.4%	2016
Sales Volume	\$32.9M	\$356M	N/A	\$80.6M	2021	\$7.9M	2009
Submarket	8,039,602	3.4%	\$21.91	6.8%	37,897	20,000	39,925

Table Source: Willdan, March 2023
 Data Source: CoStar

Figure 20: Carroll County Retail Market Rent per Square Foot

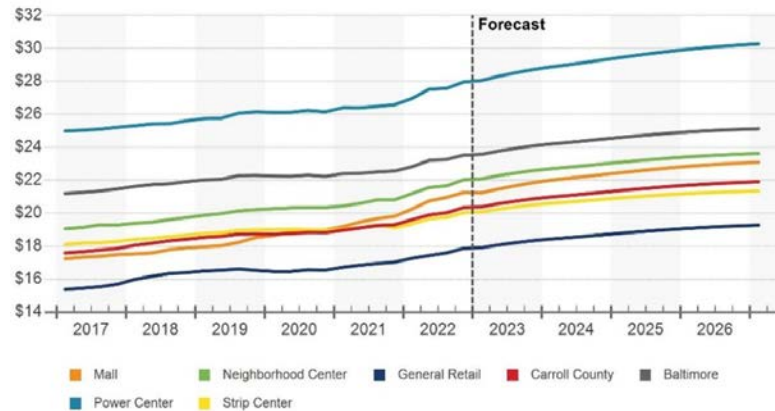


Figure Source: Willdan, March 2023
 Data Source: CoStar

Sales, Vacancy, and Lease Rates

Investors have been especially active in the capital markets in Carroll County, making it one of the most heavily traded submarkets in the region over the past several years. Annual sales volume averaged \$42.8M between 2018 and 2022, including an annual high of \$80.6M in 2021. The recorded transaction volume in the submarket reached \$27.1M in 2022. The general retail sector drove that volume.

Figure 21: Carroll County Retail Vacancy Rate

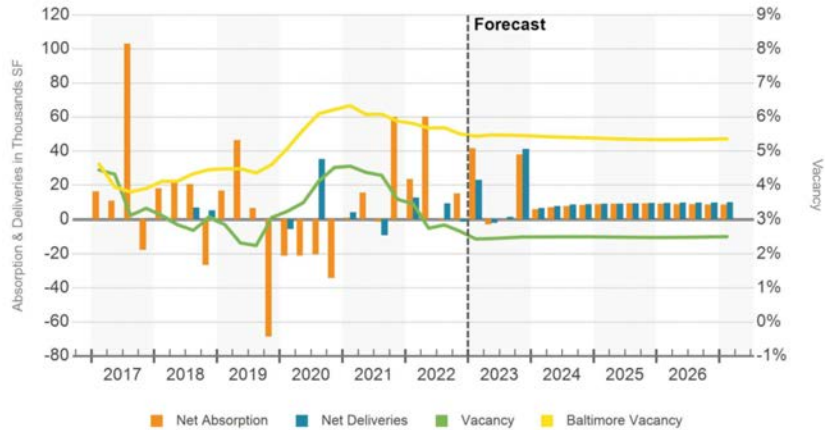


Figure Source: Willdan, March 2023
Data Source: CoStar

Market pricing, based on the estimated price movement of all properties in the submarket, sat at \$180 per square foot in 2023, Q1. That market price is up compared to the first quarter of last year, but the level still falls far short of the average for the region. The market cap rate has contracted over the past year to 6.9%, closely aligned with the regional average (6.8%).

Construction

Retail construction in the past eight quarters is slightly lagging the all-time annual average construction at 50,356 square feet versus 53,900 square feet. Within the next four quarters, 39,925 square feet is expected for delivery. Notably, 131,587 square feet of new retail is proposed for delivery within the next eight quarters in Eldersburg, Sykesville, Westminster, and Winfield.

Table 23: Retail Construction - Average, Delivered, and Proposed

All-Time Annual Avg. Square Feet	Delivered Square Feet Past 8 Qtrs	Delivered Square Feet Next 8 Qtrs	Proposed Square Feet Next 8 Qtrs
53,900	50,356	39,925	131,587

Table Source: Willdan, March 2023
Data Source: CoStar

Figure 22: Retail Construction - Average, Delivered, and Proposed

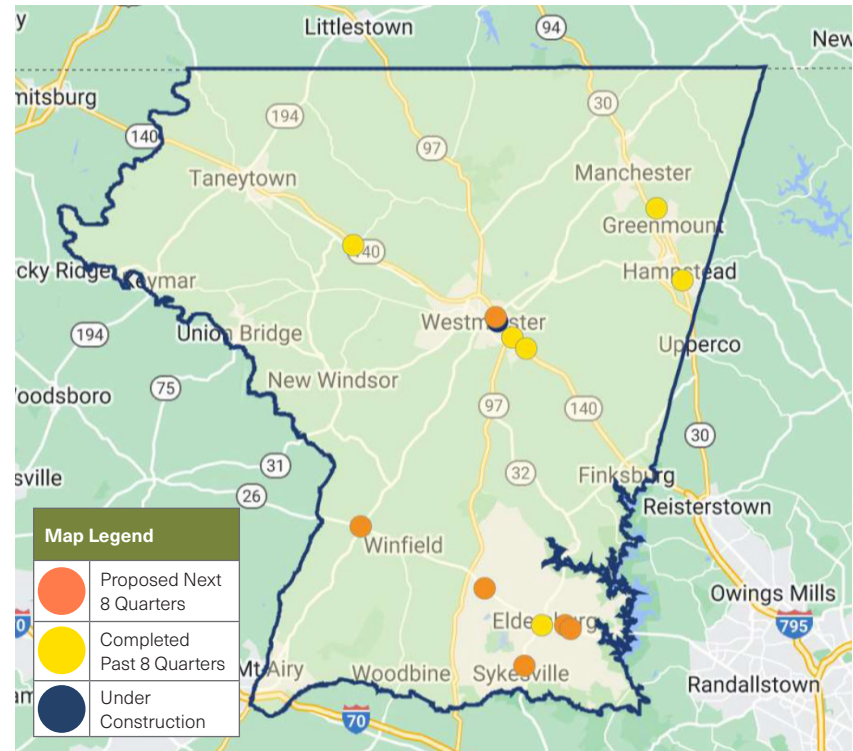


Figure Source: Willdan, March 2023
Data Source: CoStar, Google Maps

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DEVELOPMENT FUNCTIONS

Many factors influence people's decisions to live, work, or open a business in a given location. Carroll County exists in a region that competes for residents, jobs, and ultimately, tax revenue. The policies and process of Carroll County can influence potential residents and businesses deciding whether to locate or grow here versus somewhere else.

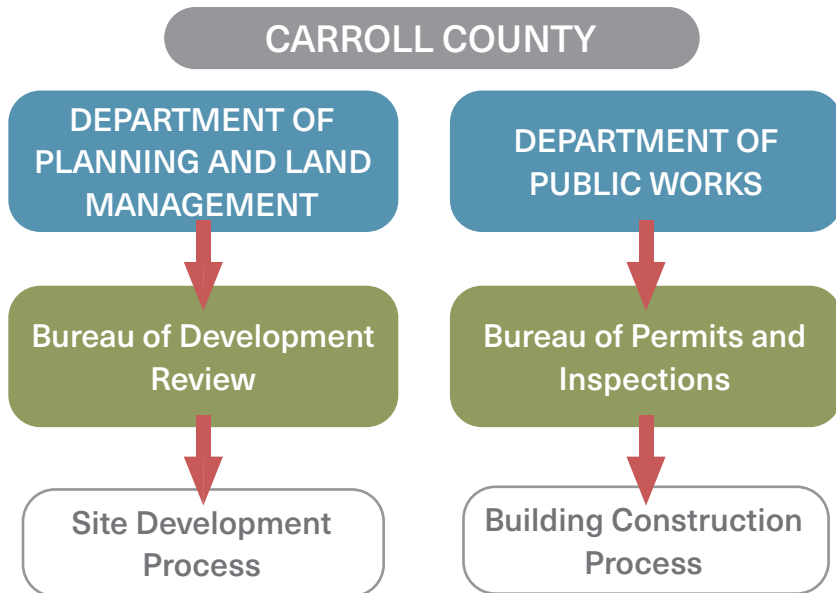
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Introduction

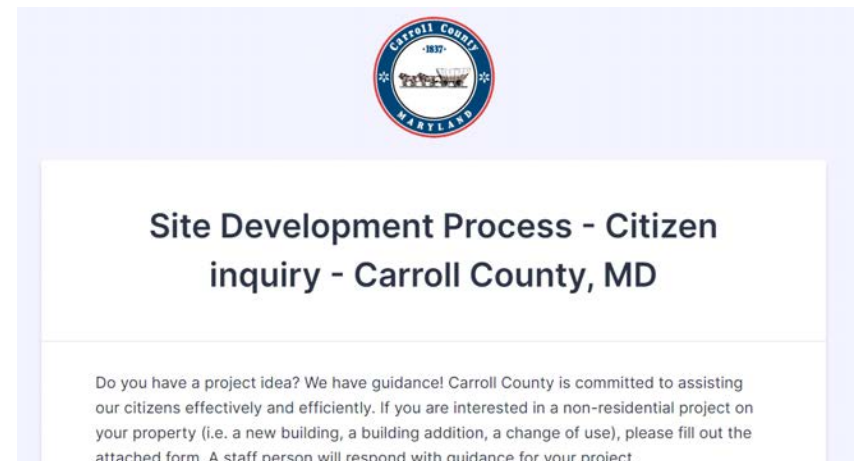
Carroll County, like most local governments, is responsible for managing a permitting process to ensure that development occurs in a manner that protects the health, safety, and welfare of the public. Meeting these requirements in an efficient manner is of benefit to the development community and County resources.

Development projects within Carroll County have two primary review components, site development and building construction, that are managed by different agencies, per Figure 23.

Figure 23: Carroll County Development Review Process Responsible Agencies



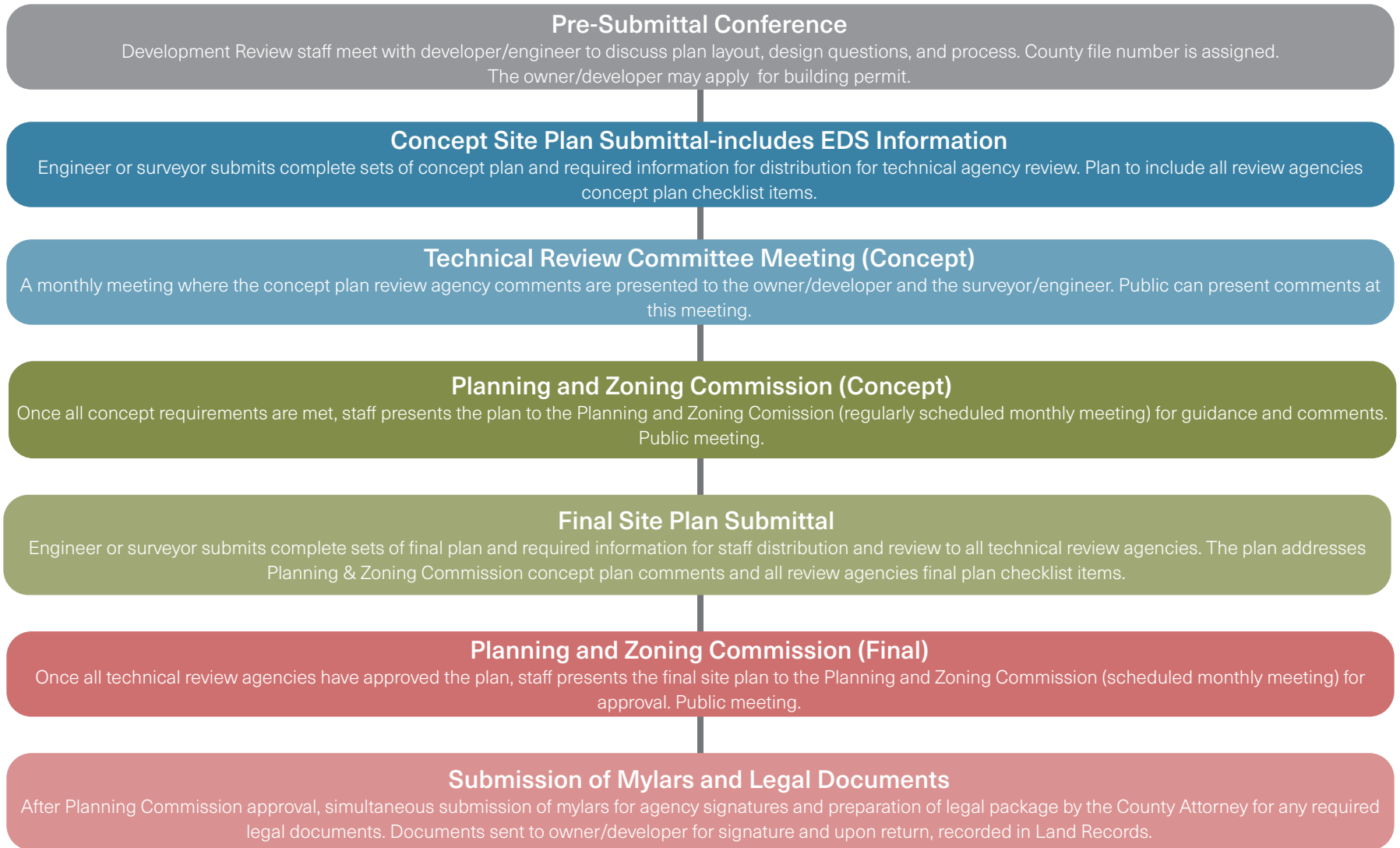
The scope of a project determines which of the agencies a developer will work with and when. To facilitate the process for the development community, a simple form linked from the County webpage collects developer information and forwards it to the County Zoning Administrator to assess and provide guidance.



Site Development

Development Review Coordinators manage the process required by Chapter 155 of the County Code to ensure that all applicable agencies responsible for reviewing development projects do so in an orderly and efficient manner. In general, the Development process is explained in Figure 24.

Figure 24: Site Development Review Process Overview



Types of Agency Reviews

The following are the technical agencies to which plans are submitted.

Development Review - In addition to coordinating the process and reviews by other agencies, Development Review Coordinators review plans for conformance with Chapter 155 of the County Code, "Development and Subdivision of Land." The Development Review Coordinator also coordinates the evaluation of projects related to Chapter 156 of the County Code, "Adequate Public Facilities and Concurrency Management." This code ensures that public facilities such as transportation, fire and emergency services, police, schools, and utilities are adequate to support the proposed development.

Water Resource Management - Conducted by the Bureau of Resource Management in the Department of Planning and Land Management, review staff ensure that projects will not have a detrimental impact to the quality of water in the County as per Chapter 154 of the County Code, "Water Resource Management." County staff also review for all municipalities except for the Town of Union Bridge.

Stormwater Management - Conducted by the Bureau of Resource Management, staff review to ensure that projects meet federal, state, and local laws pertaining to the quantity and quality of stormwater runoff from properties. The stormwater management approval process in Carroll County was identified by some stakeholders as being notably burdensome during their dealings with the County. As part of this study, a review was performed of the Carroll County regulations in Chapter 151 of the County code in comparison with Baltimore County, Howard County, and Adams County, PA. The comparison looked at permit administration, securities, inspections, maintenance, and enforcement.

It was found that Carroll County's regulations are generally in line with these Counties and are reasonable and comprehensive. The County in recent years has recognized the complexities of stormwater management, the limitations of stormwater review staff, and the effect that this has on the development process. Over the past two years, the County has increased the number of stormwater review positions from one to three engineers. The impact of the two additional reviewers on the timeliness of reviews still needs to be assessed over time. County staff also review for all municipalities except for the City of Taneytown.

Floodplain - Conducted by the Bureau of Resource Management, staff review to ensure compliance of projects with Federal and local floodplain requirements for both FEMA regulated and non-FEMA floodplains as required by Chapter 153 of the County Code, "Floodplain Management." County staff also review for all municipalities except the City of Westminster.

Landscape - Conducted by the Bureau of Resource Management, staff ensure proposed development conforms with Chapter 157 of the Carroll County code, "Landscape Enhancement of Development." County staff also reviews for all municipalities except for the Town of Union Bridge and the City of Westminster.

Forest Conservation - Conducted by the Bureau of Resource Management, staff ensure proposed development meets state and local laws regarding the preservation, reforestation, and afforestation requirements on development sites. County requirements are documented in Chapter 150 of the County Code, "Forest Conservation." The County also reviews for all municipalities.

Grading - Conducted by the Bureau of Resource Management, staff ensure that all proposed development is designed in accordance with Chapter 152 of the County Code, "Grading and Sediment Control." County staff also review for all municipalities.

Engineering Review - Conducted by the Bureau of Development Review, engineering review represents the interests of the Department of Public Works, Bureau of Engineering to ensure that all development meets Carroll County standards related to roadway and storm drain infrastructure design. These reviews are required for all projects within the County. County staff also review for Hampstead, Manchester, and New Windsor.

Utilities - Conducted by the Bureau of Utilities in the Department of Public Works, the agency reviews development plans served by County public water and sewer. These are in select areas of the County.

Road Operations - Conducted by the Bureau of Roads Operations in the Department of Public Works, the agency conveys any known infrastructure or functionality concerns known about County roadways that may adversely affect the subject development.

Zoning Administration - Conducted by the Bureau of Zoning Administration for projects in the County, outside local municipalities. The Zoning Administrator verifies the proposed use is allowable in the subject zoning district and that what is proposed conforms to Chapter 158 of the County Code, "Zoning Regulations."

Comprehensive Planning - Conducted by the Bureau of Comprehensive Planning in the Department of Planning and Land Management, projects are reviewed to ensure that they are in compliance with the County Master Plan and all applicable plans and policies.

Site Compliance Inspector - Conducted by the Bureau of Permits and Inspections, projects are reviewed for building code compliance, including the Americans with Disabilities Act.

Fire Protection Engineer - Conducted by the Department of Fire and Emergency Medical Services to ensure that the site development complies with all applicable fire codes.

Soil Conservation - Conducted by the Carroll Soil Conservation District on all projects that disturb more than 30,000 square feet. The SCD ensures that a suitable erosion and sediment control plan is included with the construction plans and that it is in conformance with Maryland State Law.

Health Department - Conducted by the Carroll County Health Department to ensure proper environmental and safety considerations surrounding water, wastewater, and any other applicable issues are addressed.

State Highway Administration - Projects that impact State roadways are reviewed and approved by the Maryland State Highway Administration.

City or Town - Projects located within the jurisdictions of local municipalities are reviewed and approved through those municipal processes. Development is still coordinated through the County, but for these projects, the County is assisting the process and final approval is through the municipalities. Projects within one mile of the municipal corporate limits are provided for the municipalities to comment on per the County/Town agreements.

Fire Chief - The chief of the local fire district is provided a set of plans for review and comment.

BGE/Allegheny Power - The private power utilities are provided plans for informational purposes.

Verizon - The private telephone utility is provided plans for informational purposes.

An aerial photograph of a suburban landscape. In the center, there is a large, long, single-story building with a light-colored roof and a large parking lot filled with cars. The building is surrounded by green lawns and trees. In the background, there are rolling hills, more residential buildings, and a clear blue sky. The overall scene is a mix of developed and natural areas.

ZONING AND LAND USE ANALYSIS

The Zoning and Land Use Analysis is a key component of the Study as it inventories the current physical and regulatory conditions of the County, forming the base for the entire Study. It outlines the County's land use makeup and identifies notable patterns, opportunities, and outliers.

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Countywide

The zoning and land use coverage analysis is a depiction of how land is currently allocated for specific purposes within Carroll County. It includes a calculation of acreage devoted to specific zoning and future land use (FLU) designations within the County as displayed in Tables 25 and 26. The 10 zoning categories are Agricultural, Commercial, Conservation, Employment Campus, Heritage, Industrial, Mixed Use, Planned Unit Development (PUD), Residential Office, and Residential. As listed in Appendix A, there are 11 FLU categories. These categories are groupings of zoning districts and land uses that share similar uses and intents, separated by varying intensities of use and density. The overlay districts were not included in this analysis because all areas with an overlay district also have a base zone, and the extent of the overlay districts did not meaningfully impact the results.

Agricultural

The Agricultural Category accounts for 68.86% of zoned land within Carroll County, making it the largest type of zoned land area. The Agricultural FLU designation accounts for 58.38%. The Agricultural (A) District intends to provide for continued farming activities, conserve agricultural land, and reaffirm agricultural activities, and operations as the preferred dominant use of the land within the district. The district also permits a limited number of single-family residences with a minimum lot size of 1 dwelling unit per acre, as is allowed in all zoning districts.

Conservation

The Conservation Category is the second-largest type of land area within Carroll County. The Conservation FLU designation accounts for 21.79%. The purpose of the Conservation (C) District is to provide a zoning category for those areas where, because of natural geographic factors and existing land uses, it is considered feasible and desirable to conserve open spaces, water supply sources, woodland areas, wildlife, and other natural resources. Large contiguous areas of C zoned parcels in the southwest corner of the County, as well as in the north, centered on Union Mills, are conserved for future planned public drinking water reservoirs.

Residential

The Residential Category accounts for 9.17% of zoned land within Carroll County. The Residential FLU designation accounts for 12.09%. The districts in this category intend to allocate land for residential development of various densities. Residentially zoned land is spread throughout the County, with the largest amounts in the Westminster MGA and Freedom DGA, with significant pockets outside of the MGA/DGAs located along MD 32 and MD 140. The R-40,000 zone comprises the most land area of Residentially zoned land while the R-20,000 zone contains the most number of lots.

Industrial

The Industrial Category accounts for 1.24% of zoned land within Carroll County. The Industrial FLU designation accounts for 2.16%. The districts in this category provide land for the development of industrial and business parks in locations where impacts can be minimized. The Industrial zoned lands in the County are located near state roads, with 84% of the 522 parcels zoned Industrial located within a quarter mile of a state road. I-1 parcels comprise 53% of the Industrial zoned land with the rest zoned I-2. There is a notable group of undeveloped parcels zoned Light Industrial (I-1) which are part of and adjacent to the Carroll County Regional Airport property, the only such group not contiguous to parcels within the quarter-mile parameter.

Commercial

The Commercial Category accounts for 0.49% of zoned land within Carroll County. The Commercial FLU designation accounts for 1.03%. The districts in this category allocate land for the provision of goods and services, medical facilities, eating establishments, and recreation, across a range of intensities. More than half of the Commercial land is zoned C-2. The most notable Commercially zoned parcels are located along major transportation corridors such as Baltimore Boulevard (MD 140), Hanover Pike (MD 30), and Liberty Road (MD 26).

Heritage

The Heritage Category accounts for 0.05% of the land within Carroll County. The Heritage FLU designation accounts for 0.00%. There is only one group of parcels zoned Heritage in the county, located in Uniontown.

Employment Campus

The Employment Campus Category accounts for 0.05% of the land within Carroll County. The Employment Campus FLU designation accounts for 0.54%. The Employment Campus (EC) District is intended to foster a mix of residential, commercial, office, and light industrial uses. A total of five parcels are zoned EC, divided into two sites. EC Site 1 consists of a single parcel located near the Northern Landfill on MD 140, and is bordered by Industrial land to the west, Agricultural to the north and east, and Residential to the south. EC Site 2 consists of four parcels located to the northeast of the intersection of MD 26 and MD 97. Locations of the EC zoned parcels are shown in Figures 21 - 23. This site is interspersed among Agricultural land, with Conservation to the north and a collection of Industrial parcels to the west. Both sites are currently undeveloped.

Agriculture, Preservation, and Agritourism

Carroll County's award-winning agricultural preservation (ag. pres.) program has been highly successful in its mission to support the County's farming community through the purchase of conservation easements. The goal is for at least 100K acres of land in the County to be preserved as agricultural, with the number representing the minimum amount of land necessary to maintain a viable agricultural base. As of June 2023, a total of 78,281 acres of land have been preserved across four programs.

The Carroll County Easement Purchase Program, directly administered by the County, has preserved 24,072 acres of land at a cost of \$173,326,778. The rest of the land has been preserved through programs of the Maryland Agricultural Land Preservation Foundation, Maryland's Rural Legacy program, and through land trusts, in which the County has varying levels of involvement.

Table 24: Acreage of Each Zoning Category in Carroll County

	Agricultural	Commercial	Conservation	Employment Campus	Heritage	Industrial	Mixed Use	PUD	Res Office	Residential	Total
Hampstead	-	157	718	-	56	397	-	-	46	771	2,145
Manchester	-	118	359	-	-	-	-	-	-	1,045	1,522
Mount Airy	-	170	-	94	-	204	31	-	6	1,153	1,658
New Windsor	-	5	102	28	-	81	48	-	-	206	470
Sykesville	-	94	303	94	-	-	-	-	-	526	1,017
Taneytown	-	321	254	-	-	224	-	-	-	1,344	2,143
Union Bridge	-	44	131	-	-	140	-	-	-	412	727
Westminster	-	625	466	-	-	514	25	297	47	2,155	4,129
Unincorporated	185,332	1,677	57,730	131	156	3,767	-	-	-	26,846	275,639
Full County	185,332	3,211	60,063	347	212	5,327	104	297	99	34,458	289,450¹

Table Source: WGI, July 2023

Data Source: Hampstead, Manchester, Mount Airy, New Windsor, Sykesville, Taneytown, Union Bridge, Westminster, Carroll County Departments of Planning

Table 25: Acreage of Each Future Land Use Category in Carroll County

	Agricultural	Commercial	Conservation	Employment Campus/ Mixed Use	Heritage	Industrial	Institutional	Mining/ Resources Extraction	PUD	Residential	Total
Finksburg	-	131	73	-	-	283	-	-	-	92	579
Freedom	1,954	511	6,996	128	-	420	1,436	-	-	6,778	18,223
Hampstead	-	202	1,006	44	7	557	-	-	-	925	2,734
Manchester	-	150	417	-	-	-	-	-	-	1,307	1,874
Mount Airy	-	239	643	265	-	224	-	-	-	960	2,331
New Windsor	-	17	149	135	-	167	-	-	-	404	872
Sykesville	-	32	1,482	123	-	68	-	-	-	592	2,297
Taneytown	-	409	384	17	-	658	-	-	-	1,883	3,351
Union Bridge	-	42	444	-	-	561	-	-	-	600	1,647
Westminster	32	831	2,247	547	-	1,349	-	-	-	5,427	10,433
Unincorporated	166,594	398	49,086	299	-	1,940	7,637	2,514	-	15,956	244,424
Full County	168,580	2,962	62,927	1,558	-	6,227	9,073	2,514	-	34,924	288,765¹

Table Source: WGI, July 2023

Data Source: Hampstead, Manchester, Mount Airy, New Windsor, Sykesville, Taneytown, Union Bridge, Westminster, Carroll County Departments of Planning

¹ The spatial data provides minor inconsistencies as certain data has been rounded to make the data analysis more efficient.

Regional Comparison

The Study team compared the percentage of land allocated to the various zoning categories in Carroll County to its regional peer counties to assess similarities and differences. Carroll County is located within larger metropolitan areas and markets that compete for residents, jobs, and companies. Allocation of land can be a major factor in enabling or limiting growth.

Table 26 highlights each peer county and shows zoning as a percentage of the total county land area, respectively. For all listed counties, their incorporated and unincorporated areas were included in the total land area, and zoning districts were classified into the zoning categories established in Table 24. The exact districts included within each category vary by exact nomenclature, intent, and permitted uses established by each jurisdiction but are generally comparable.

Harford County has the highest percentage of its land zoned for Agricultural. However, the County does not have a Conservation Zone or District with similar intent. When looking at these two categories together, Carroll County has the highest percentage of land with 84.8% of the county’s total land zoned Agricultural and Conservation. Carroll County has the second lowest percentage of land zoned Commercial behind Frederick County. However, Frederick County also has Mixed Use zoned land, which typically includes commercial development. Carroll County also has a low percentage of Industrial land compared to its peers. Harford County has a lower percentage of Industrial zoned land, but the large and economically significant Aberdeen Proving Ground, operated by the U.S. Army, is not zoned for any purpose. Carroll County’s share of land dedicated to Residential uses is in line with its

neighbor, Frederick County which also has a high amount of Agricultural and Conservation land. Overall, these findings are in line with the other qualitative and quantitative findings of this Study. The emphasis placed on agricultural and rural residential development is reflected in the table, and the infrastructural constraints associated with further commercial and industrial development.

Table 26: Regional Zoning Categories Comparison

Zoning Category	County			
	Frederick	Baltimore	Carroll	Harford
Agricultural	58.3%	36.8%	64.0%	72.0%
Commercial	0.9%	3.2%	1.1%	4.4%
Conservation	24.4%	30.4%	20.8%	
Employment Campus	0.2%		0.1%	0.3%
Heritage	0.0%		0.1%	
Industrial	2.3%	5.2%	1.8%	1.3%
Institutional	0.4%			
Mining	0.9%			
Mixed Use	1.0%		0.0%	0.5%
PUD	1.9%		0.1%	
Res Office	0.0%	0.1%	0.0%	0.1%
Residential	9.8%	24.3%	11.9%	21.4%

Table Source: WGI, July 2023
 Data Source: Frederick County, Baltimore County, Carroll County, Harford County Departments of Planning

I-1 and Employment Campus Districts

Carroll County, MD Code of Ordinances: Sec. 158.079 I-1 Light Industrial District

(A) Purpose and intent. [...] Industrial Parks are encouraged in this district to provide for clustering of similar industrial uses with common access and infrastructure, as well as the provision of open spaces, stormwater management, and adequate buffering.

The clustering of I-1 zoned parcels together to create industrial and business parks resembles the intent of the Employment Campus Zoning District. This is underscored by the location of the large Employment Campus designation located next to a collection of adjacent I-1 zoned parcels. There is some overlap in the permitted uses of the two zoning districts, but differences based on their intents are clear. Both districts permit General Professional and Business Office uses, as well as Light Manufacturing, among others. The I-1 District permits more intense land uses such as Agricultural Supplies and Sales, Vehicle Sales and Service, and Manufacturing uses for building supplies and other goods. The Employment Campus District does not permit these intense Industrial uses but does permit Single-Family and Multifamily residences in addition to more resident- and consumer-focused Commercial uses such as General Retail, Restaurants, and Medical and Dentist Offices. Appendix B highlights the differences in permitted uses between the two zoning districts. Figures 26 and 27 show the two areas zoned Employment Center Campus, in the Freedom DGA and to the east of Westminster, respectively.

Figure 25: Industrial and Employment Campus Zones

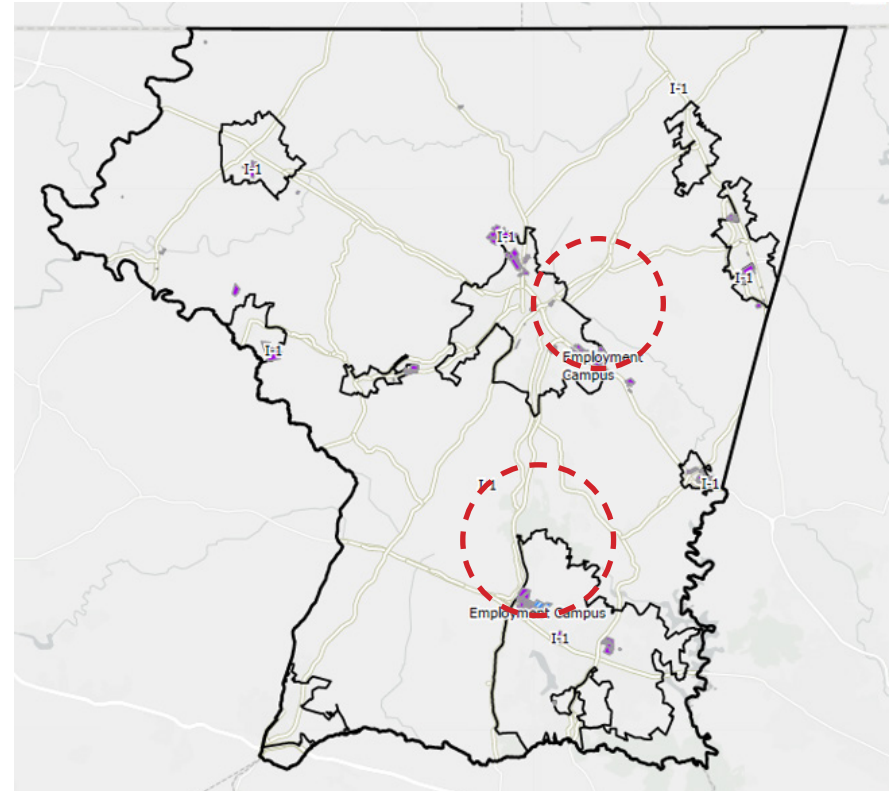


Figure Source: WGI, July 2023

Data Source: Carroll County Department of Planning

LEGEND

Future Land Use Category

- Employment Campus
- Industrial

- Designated Growth Areas
- Corporate Limits

- Emphasis Area

Figure 26: MD 140 Employment Campus Zoning

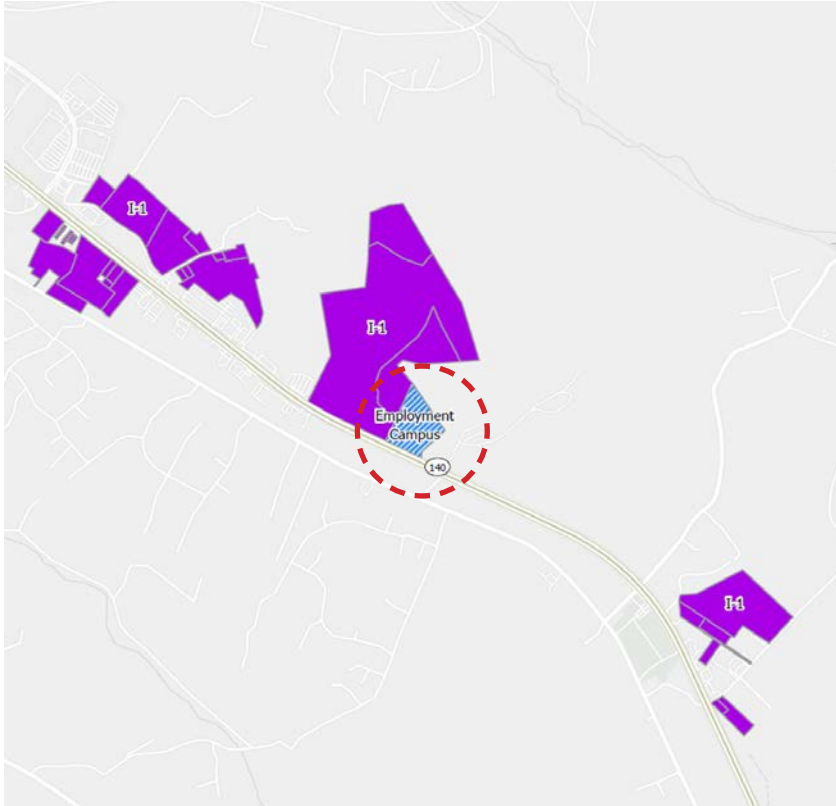


Figure Source: WGI, July 2023
Data Source: Carroll County Department of Planning

LEGEND






- | | |
|---|---|
| Future Land Use Category | |
|  Employment Campus |  Designated Growth Areas |
|  Industrial |  Corporate Limits |
| |  Emphasis Area |

Figure 27: MD 26 Employment Campus Zoning

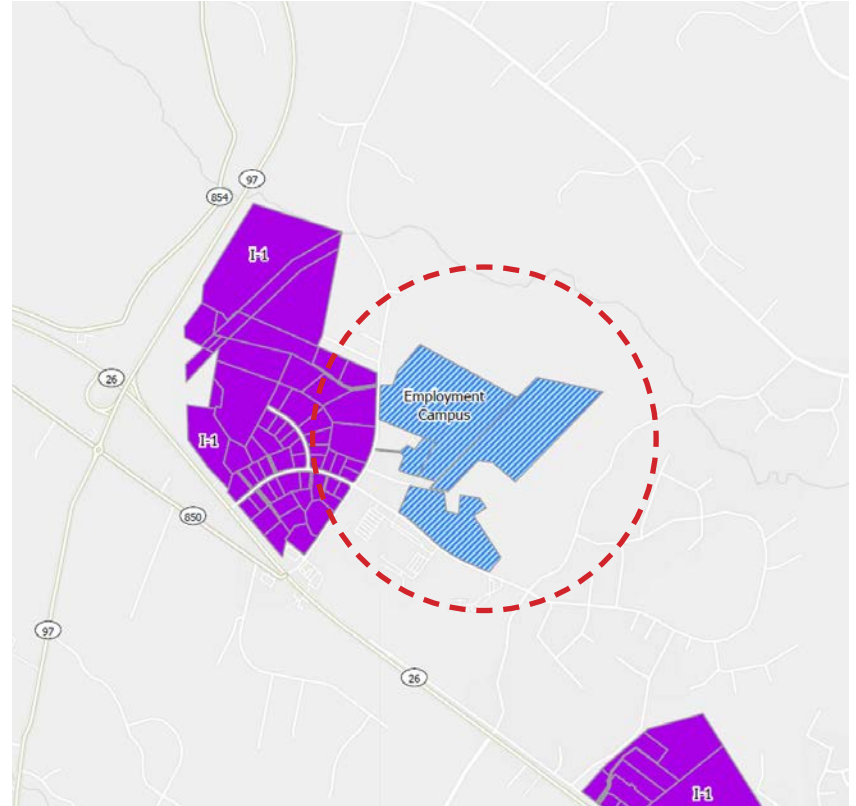







Figure Source: WGI, July 2023
Data Source: Carroll County Department of Planning

LEGEND

- | | |
|---|---|
| Future Land Use Category | |
|  Employment Campus |  Designated Growth Areas |
|  Industrial |  Corporate Limits |
| |  Emphasis Area |

GROWTH SCENARIOS

As Carroll County prepares to draft a new General Development Plan, many decisions will be made about how much and what kind of growth the county will pursue. As a precursor and supporting document to the forthcoming General Development Plan, this section seeks to provide guidance on the overarching capacity and feasibility of economic growth for years to come.

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Market Demand

Feasibility Scale



Sectors to Pursue	Scenario A	Scenario B	Scenario C	Scenario D
Average Annual Commercial Absorption (SF)	Negative – 150K	150K – 350K	350K – 550K	550K +
Industry Sector				
Retail Trade	√	√	√	√
Construction	√	√	√	√
Health Care and Social Assistance	√	√	√	√
Professional, Scientific, Technical Service	√	√	√	√
Accommodation and Food Services		√	√	√
Manufacturing		√	√	√
Wholesale Trade		√	√	√
Agriculture, Forestry, Fishing, and Hunting	√	√	√	√
Economic Development Driver				
Agricultural Production	√	√	√	√
Agricultural Technology				√
Agritourism and Hospitality				√
Manufacturing	√			√
Distribution and Warehousing	√			√
Defense Contracting				√
Biotechnology				√
Research and Development			√	√
Small Business Incubation	√	√	√	√
Information Technology and Data			√	√
Drone and Autonomous Logistics				√

Scenario A

The Construction industry may shift with the lack of residential growth towards more custom construction rather than larger developments.

The Healthcare industry would likely expand to care for the County's aging population.

The gradual buildout of existing Industrial and other flex space would be realized and contribute to the net absorption.

Scenario B

The industry sectors in this scenario would follow those described in Scenario A, while also projecting growth in Retail Trade; Manufacturing; and Wholesale Trade. These sectors reflect existing clusters and demand.

The Accommodation and Food Services industry would be pursued commensurate with demand.

The Professional, Scientific, Technical Service industry could mildly grow.

Scenario C

A mixture of sectors needs to be targeted and prioritized to achieve this level of growth within this scenario.

The sectors identified in Scenarios A and B would be followed by a more pronounced focus on Manufacturing and Wholesale Trade, which encompass many of the economic development drivers uses identified in the Study.

As this scenario seeks to address the County's budgetary needs by minimizing or removing the need to increase tax rates, financially impactful Industrial and Employment Campus uses would be necessary to attract.

Scenario D

A mixture of sectors needs to be targeted and prioritized to achieve this level of growth within this scenario.

The sectors identified in Scenario C would be followed by a more pronounced change within the Construction industry.

While present in all scenarios, the level of residential and commercial growth under this scenario would correlate to a more noticeable presence in the Construction industry.

The full range of economic development driver uses would be considered contributors to meeting this goal.

Market Development

Feasibility Scale




Workforce and Housing	Scenario A	Scenario B	Scenario C	Scenario D
Population Growth per Year	0% or less (No change or decline in residents)	0% - 0.8% (Approx. 0 - 1,360 residents)	0.8% - 1.2% (Approx. 1,360 – 2,000 residents)	1.2% + (Approx. 2,000 + residents)
Additional Commuter Internal Capture	Very low	Very low – Low	Low – Moderate	Moderate

All Scenarios

In all cases, the county's forthcoming housing study should make recommendations with its analysis of needs and opportunities. However, the county's ability to attract new employers and maximize its tax revenue is tied to its workforce. Both county residents who commute out of the county and workers who commute into the county for jobs reduce tax revenue captured from sources such as property, income, and sales taxes, whereas residents who live and work in the county tend to contribute more of their taxes solely to Carroll County. The level of in- and out-commuters able to be captured within the county will scale alongside the growth of the scenario.

Land Use

Feasibility Scale



Future Land Use and Zoning	Scenario A	Scenario B	Scenario C	Scenario D
Agricultural	Further measures to meet the County’s agricultural production and preservation goals will advance independently of the economic development needs of the County. Under all scenarios, actionable strategies for establishing future goals of the ag. pres. program beyond 100K acres and further development of agritourism in Carroll County would be independently studied.			
Significance of Change to Existing FLU Categories during Updates to the General Development Plan				
Outside of MGAs/DGAs	Insignificant	Insignificant	Mildly Significant	Moderately Significant
Inside of MGAs/DGAs	Insignificant	Mildly Significant	Moderately Significant	Highly Significant
Expansion of Existing MGAs/DGAs Boundaries				
Yes			√	√
No	√	√		
Priority Greenfield and Redevelopment Areas	Please refer to the Priority Greenfield and Redevelopment Matrix on page 94 for further information on specific sites.			

Scenario A

Prioritization of low-density Residential, Agricultural, and Conservation land uses would occur under this scenario. Insignificant to no FLU or zoning changes are anticipated for this growth scenario.

Scenario B

In addition to the land uses prioritized under Scenario A, this scenario could see limited areas rezoned to Commercial, Industrial, and/or Residential districts. However, the County’s current land use designations are sufficient to meet the targets of this scenario. Any FLU or zoning changes would be limited to areas where

current infrastructure could support growth, such as along current major roads, within existing and priority water and sewer service areas, and priority green and redevelopment sites, as identified on page 94.

Scenario C

Under this scenario, the FLU would need to be reevaluated during the drafting of the General Development Plan.

In areas outside of the MGAs/DGAs, there may be limited opportunities for small updates to the FLU and zoning based on factors such as proximity to major transportation corridors, existing industry clusters, and availability of public infrastructure to service development.

The areas inside of the MGAs/DGAs would likely have moderate changes to the FLU and zoning designations as these are the areas identified to capture new growth and development. New potential areas for Commercial and Industrial uses would be identified to meet the growth rates of this scenario.

The need to expand any of the MGA/DGA boundaries will need to be evaluated to see if additional areas are needed to capture the new growth.

Scenario D

Under this scenario, the FLU and zoning would need to adapt significantly to effectively meet the projected growth.

The County would need to shift its land use allocations to resemble its higher-growth peers by allocating more land to Commercial, Employment Campus, and Industrial uses. This would result in changes to the FLU and zoning of parcels located both outside and inside of the MGAs/DGAs.

Although these changes would primarily occur within the MGAs/DGAs, expansion of the existing boundaries would need to occur to capture the new growth.

Feasibility Scale



Infrastructure Capacity	Scenario A	Scenario B	Scenario C	Scenario D
Drinking Water and Wastewater				
Significance of Impact on Existing Water Supply	Insignificant	Mildly Significant	Moderately Significant	Highly Significant
Areas of Priority	-	Targeted MGAs/DGAs	All MGAs/DGAs	Expanded MGAs/DGAs
Programs and/or Projects to Address Projected Infrastructure Needs	-	Incremental Measure(s): Water Reuse Larger Scale Measure(s): None	Incremental Measure(s): Water Reuse Larger Scale Measure(s): Piney Run Reservoir Use Union Mills Reservoir Expansion	Incremental Measure(s): Water Reuse Larger Scale Measure(s): Piney Run Reservoir Use Union Mills Reservoir Expansion

Scenario A

With the low level of growth that characterizes this scenario, drinking water and wastewater systems would not experience additional strain on capacity from commercial and residential growth.

Resources would be dedicated to meeting existing needs, including current deficiencies.

Future maintenance and regulatory obligations could constrain systems and require costly projects that would not have additional revenues from a larger tax base to help with the finances.

Scenario B

Under this scenario, continued targeted measures to maintain and increase the quantity and quality of water supply would occur.

Resources would be dedicated to targeted MGAs/DGAs where the most vacant land, especially those areas zoned Industrial, Commercial, or Employment Campus, are located, such as Westminster, Freedom, Taneytown, and Mount Airy.

Prioritization of economic development driver uses over residential development would be a strategic course of action for the County to pursue to assist with maintenance and upgrades. See the County’s Water Resources Element for further information about project opportunities and constraints.

Scenario C

Under this scenario, increasing the drinking water supply and overall water infrastructure needs would be necessary to meet the projected growth under this scenario.

Resources would be dedicated in a similar way in Scenario B; however, all MGAs/DGAs would be taken into consideration. The level of development and population growth projected in this scenario would likely require more significant investment in drinking water and wastewater infrastructure.

Prioritization of projects ranked highly in the Water Resources Element which should be investigated more thoroughly to address infrastructure needs to meet the projected growth under this scenario.

Scenario D

Under this scenario, a significant impact on the County’s existing water and wastewater systems would occur.

Resources would be dedicated in a similar way to Scenario C but with greater intensity. Expansion of MGAs/DGAs boundaries would also be taken into consideration. The population and net absorption increases would create the need for additional areas within and outside of the MGAs/DGAs to adapt accordingly to the infrastructure demands.

Prioritization of projects would require an exploration of the full range of supply options explored in the Water Resources Element to meet the high growth conditions.

Feasibility Scale



Infrastructure Capacity	Scenario A	Scenario B	Scenario C	Scenario D
Transportation				
Significance of Impact on Existing Capacity	Insignificant	Insignificant	Significant	Significant
Areas of Priority	Project Specific	Project Specific	Project Specific MGAs/DGAs	Project Specific County-Wide
Programs and/or Projects to Address Projected Infrastructure Needs	Improvements proportionally based on specific development projects.	Improvements proportionally based on specific development projects.	Improvements proportionally based on specific development projects as well as within MGAs/DGAs experiencing growth pressures and increased congestion.	Improvements proportionally based on specific development projects as well as within county-wide areas experiencing growth pressures and increased congestion.
Alternative Modes of Transportation	Greater emphasis on alternative ways to travel throughout the County, such as bicycling, could be pursued under any of the scenarios. Part of these efforts could include the implementation of the Patapsco Regional Greenway, which would improve opportunities for alternative transportation, recreation, and economic development for communities along the route.			
Other County Services	Schools, emergency services, and other services would be maintained at levels commensurate with the size and needs of the County. Certain projects and expenses will be required regardless of growth level and will need to be budgeted for.			

Scenario A

Transportation infrastructure would likely remain characteristically as-is. Road expansions and widening would likely not be pursued.

Scenario B

Transportation infrastructure improvements and priorities would not significantly change from that of Scenario A.

Scenario C


Transportation infrastructure would be more burdened under this scenario. While the zoning and housing policies would seek to capture trips internally and encourage alternative modes of transportation, the County's roads, specifically within and near MGAs/DGAs, would likely see an increase in traffic associated with residential and commercial growth.

Scenario D

Transportation infrastructure improvements and priorities would not significantly change from that of Scenario C. Roads county-wide would likely see a noticeable increase in traffic associated with the high rate of residential and commercial growth associated with this scenario.

Fiscal Sustainability

Feasibility Scale



Financial Impacts	Scenario A	Scenario B	Scenario C	Scenario D
Relationship of Expenditures to Revenues	Expenditures rise at a rate significantly faster than revenues.	Expenditures rise at a rate moderately faster than revenues.	Expenditures and revenues rise at a more balanced rate.	Expenditures rise at a rate slower than revenues.
Budgetary Impact	High Deficit	Low Deficit	Low Deficit – Balanced	Balanced – Surplus
County Revenue Generation	For a top-level assessment on general projected revenue generation for a sample of non-residential use types, refer to the Property-Specific County Revenue Generation table under Appendix E.			

Scenario A

Residential tax revenue would increase along with assessed property values; however, gains would be realized from the existing housing stock.

The lack of commercial or industrial growth under this scenario leads to a limited increase in the non-residential tax base.

Overall, county expenditures will continue to rise both due to inflation and meeting the new needs of its residents. Therefore, an increase in the budget scenario would continue.

Scenario B

Residential tax revenue would increase moderately compared to Scenario A but associated costs would also rise proportional to the level of development.

The limited commercial or industrial growth under this scenario leads to a moderate increase in the non-residential tax base.

The growth rates of this scenario do not guarantee that it will fully account for the necessary funds to meet the rise in inflation and growth demands. Therefore, it would be likely that a slight deficit in the budget scenario would remain.

Scenario C

Residential tax revenue would increase similarly to that of Scenario B.

Under this scenario, the focus would be on the expansion of the non-residential tax base. In Carroll County, non-residential uses tend to be net contributors to County funds while residential uses tend to be net recipients.

The economic activity generated by new workforce uses, as well as increased retail and restaurant spending would boost county revenue, resulting in a more balanced rise in expenditures and revenues, closing the deficit gap to become more of a balanced budget scenario.

Scenario D

Residential tax revenue would increase similarly to that of Scenarios B, and C.

As this scenario projects the highest growth rates, the non-residential tax base would likely provide the largest increase to its revenues proportional to additional costs.

While significant growth is projected under this scenario, it is likely that the most and largest capital improvement projects would be necessary to facilitate and manage the growth. These types of expenditures would require diligent planning and forecasting. If appropriately taken into consideration, then a surplus budget scenario may be attainable.

Public Sentiment

Feasibility Scale

Scenario A

County residents and stakeholders expressed a lack of support for this scenario based on a few reasons.

While many residents and stakeholders are firmly in support of maintaining the County's rural and agricultural heritage, the extent to which it is executed in this scenario was scrutinized.

Comments received at four public open houses and online surveys expressed that while growth needs to be managed, a singular focus on agriculture would also miss the mark. A lack of proactive rezoning and accommodation of economic development drivers would not be unpopular, but the implications of this scenario would be. Cuts to county services and increases to the tax rate were noted as being highly controversial.

Scenario B

County residents and stakeholders expressed moderate support for this scenario based on a few reasons.

This scenario was found to be generally in alignment with the written comments and verbal feedback gathered at the four public open houses and online surveys, many of which reflected agreement with the goals of this scenario. However, based on its definition as the "status quo" scenario, potentially unpopular budgetary tradeoffs and tax rate changes may be necessary depending on the County's budget process.

Scenario C

County residents and stakeholders expressed favorable support for this scenario based on a few reasons.

This scenario was the most in alignment with balancing growth and maintaining county services and rural character. Based on the responses from the four public open houses and online surveys, there was a general understanding that growth is necessary to continue providing the quality of county services that are expected.

Although this would be the preferred growth scenario based on those who participated in the public outreach, there is a need to fully investigate appropriate economic development driver uses that balance sentiment with economic returns.

Public sentiment was less favorable on more intense uses, such as Industrial, Manufacturing, Warehousing, Biotechnology, and Defense Contracting, although they would likely provide a greater impact on the County's budgetary needs.

Alternatively, public sentiment was more favorable on less intense uses, such as Small Business Incubation and Agritourism although they would likely provide a lesser impact on the County's budgetary needs.

Scenario D

County residents and stakeholders expressed a lack of support for this scenario based on a few reasons.

Residents and stakeholders found this projected growth scenario to be in misalignment with appropriately balancing quality of life with economic opportunities. Sentiments from the four public open houses and online surveys were consistent regarding increased residential density and the associated traffic and stress on services at the defined levels.

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OPPORTUNITIES

The County's existing economic development tools prioritize servicing the economic goals of the County, such as expanding the tax base, prioritizing business attraction and retention, preserving agricultural character, and helping to maintain it as a viable community to live and work in. Targeting industry sectors for growth in the coming years can help the county strategically position itself for an optimal future that enhances the economy while continuing to celebrate the character and atmosphere that Carroll County and its community prides itself on.



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Vacant Parcels

The County Department of Planning identified vacant Industrial and Commercial parcels that have the potential for future development. This data was filtered to only include vacant non-residential parcels within MGA/DGAs and processed to sort the parcels into totals by zoning category. The Freedom DGA has the most amount of developable land, followed by the City of Taneytown. Out of all the categories, the most vacant land is zoned for Industrial purposes, with 743 acres. The most amount of vacant Industrial land is located in the City of Westminster, followed by the Town of Union Bridge.

These two MGA/DGAs have a combined total of 405 acres of vacant Industrial land. The vacant Industrial land in Westminster is spread across 19 parcels with a mean size of 13.8 acres, spatially distributed relatively equally across the city without a significant concentration in the north. The category with the next highest area is Residential with 467 acres. The Freedom DGA and Mount Airy MGA have the largest amount of vacant Residential land. Freedom's vacant Residential land is mostly contained within a single, 116-acre parcel adjacent to the Eldersburg Business Center. See Table 27 for further breakdown.

Table 27: Vacant Parcel Matrix

Zoning Category	Finksburg	Freedom	Hampstead	Manchester	Mount Airy	New Windsor	Sykesville	Taneytown	Union Bridge	Westminster	Total
Agricultural				2.37				371.50		34.91	408.78
Commercial	12.18	48.03	54.67	54.57						16.06	185.51
Conservation		131.13		8.01		6.48			8.56	32.66	186.84
Employment Campus		113.69					41.5				113.69
Heritage											0.00
Industrial	128.25	55.10			49.42	26.41		78.60	144.15	261.46	743.39
Residential		146.99	96.12	0.36	109.04			30.51		84.22	467.24
Total	140.43	494.94	150.79	65.31	158.46	32.89	41.5	480.61	152.71	429.31	-

Table Source: WGI, February 2023
 Data Source: Carroll County Department of Planning

Major Corridors

Major transportation corridors represent growth opportunities, as these roads are already home to much of the non-residential development in the unincorporated and incorporated portions of the county as well as being prime locations to handle an increase in traffic and activity.

Baltimore Boulevard (MD 140)

One of the County's major corridors is Baltimore Boulevard (MD 140). MD 140 through the Finksburg DGA is a primary arterial route between central Carroll County, northwestern portions of Baltimore County, and Baltimore City (see Figure 28) as it contains numerous commercial and retail developments. The Study area is a 2.5-mile area centered on the intersection of MD 140 and MD 91, containing parcels up to a quarter mile back from both roads. This corridor includes several business centers and a number of vacant or underutilized parcels. As seen in Table 28, the area contains a mix of zoning districts which includes Residential, Commercial (primarily C-2), Industrial, and Conservation.

A major constraint to the further development of the corridor is its lack of water and sewer facilities. While it is in a DGA, there are no planned water or sewer systems for the area, meaning that the properties rely on wells and septic systems.



Baltimore Boulevard, MD 140

Image Source: https://commons.wikimedia.org/wiki/File:2016-08-20_14_36_35_View_west_along_Maryland_State_Route_140_%28Taneytown_Pike%29_at_Maryland_State_Route_31_%28New_Windsor_Road%29_in_Westminister,_Carroll_County,_Maryland.jpg

Figure 28: Baltimore Boulevard (MD 140) at Finksburg Corridor Zoning

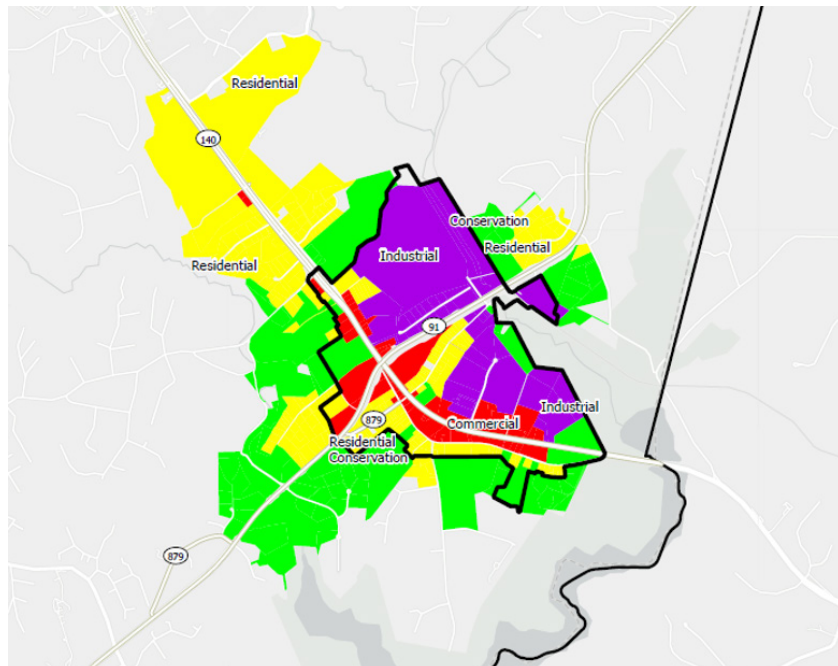


Figure Source: WGI, July 2023
Data Source: Carroll County Department of Planning

LEGEND

Future Land Use Category

- Commercial
- Conservation
- Industrial
- Residential
- County Boundary
- State Roads
- Designated Growth Area

Table 28: Zoning Coverage within Baltimore Boulevard (MD 140) Corridor Area

Zoning	Acreage	Percent
Conservation	536.4	37.1
R-10,000	82.4	5.7
R-20,000	140.6	9.7
R-40,000	278.9	19.3
I-1	84.3	5.8
I-2	213.8	14.8
C-2	110.9	7.7

Table Source: WGI, July 2023
Data Source: Carroll County Department of Planning

Liberty Road (MD 26)

The Liberty Road (MD 26) corridor gathers its importance from being a main southern access from Carroll County to Frederick in the west and to Baltimore in the east. Unlike the Finksburg corridor, public water and sewer are available at this location. The Liberty Road Corridor is the center of a major DGA. This analysis focuses on the segment of the road around Eldersburg, with the study area being a 4-mile stretch centered on the Sykesville Road (MD 32) and MD 26 intersection, with the width being a quarter mile from each side of the road (see Figure 29). As seen in Table 29, the area contains a mix of zoning districts which includes Commercial (primarily C-2 and C-3), Residential (primarily R-10,000 and R-20,00), and Industrial (primarily I-1).



Liberty Road, MD 26

Image Source: https://commons.wikimedia.org/wiki/File:2016-08-21_14_14_11_View_west_along_Maryland_State_Route_26_%28Liberty_Road%29_at_Buffalo_Road_in_Covers_Corner_Carroll_County_Maryland.jpg

Figure 29: Liberty Road (MD 26) Corridor Zoning

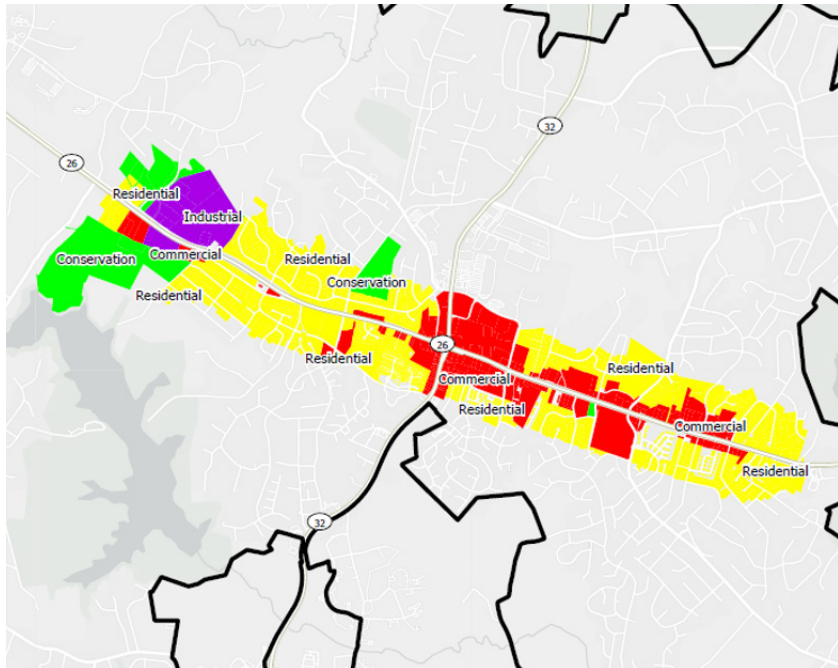


Figure Source: WGI, July 2023
Data Source: Carroll County Department of Planning

LEGEND

Future Land Use Category

- Commercial
- Conservation
- Industrial
- Residential
- County Boundary
- State Roads
- Designated Growth Area

Table 29: Zoning Coverage within Liberty Road (MD 26) Corridor Area

Zoning	Acreage	Percent
Conservation	189.2	14.9
R-7,500	0.9	0.1
R-10,000	126.5	10.0
R-20,000	495.8	39.2
R-40,000	50.0	4.0
I-1	96.2	7.6
C-1	11.5	0.9
C-2	177.9	14.1
C-3	117.7	9.3

Table Source: WGI, July 2023
Data Source: Carroll County Department of Planning



Hampstead Marketplace

Image Source: Carroll County Economic Development Department

Priority Greenfield and Redevelopment Matrix

Methodology Statement

The Priority Greenfield and Redevelopment Matrix evaluates relevant, determinant factors to potential development for Industrial and Employment Campus-style development. Each factor is assigned a value, 1 being the lowest and 3 being the highest, to gauge which sites are best suited for those desired development types. Sites were sourced from County data, the CarrollBiz website, and the team's review of county zoning conditions during the Study process. Certain factors, such as zoning designation and planned water service, are weighted double (denoted by **) because of their outsized importance to developing a site. Factors such as concentration of employment or zoning overlays are less critical to a potential project's feasibility, and are weighted normally to reflect this. Refer to the overall scores used to sort the sites by priority based on the weighted averages of all of the numbers provided in Tables 30 and 31. It shall be noted that Table 32 is listed in order starting from the top, the sites most feasible to develop according to the methodology provided.

Table 30: Scores Matrix - Internal Site Factors

Internal Site Factors	Score
Zoning** and FLU	
Industrial, Employment Campus	3
Mixed-Use, Business, Commercial	2
Residential, Conservation, Agricultural, and Other	1
Designated Growth Area**	
Yes	3
No	1
Priority Funding Area	
Yes	3
No	1
Additional Constraints**	
No Constraint	3
Minor Constraint	2
Major Constraint	1

Table 31: Scores Matrix - External Site Factors

External Site Factors	Score	
Infrastructure Capacity	Water Service Area**	
	Existing/Final Planning	3
	Priority (0-6 years)	3
	Future (7-10 years)	2
	Long Range (10+ years)	1
	No Planned Service (Well Water)	1
	Sewer Service Area	
	Existing/Final Planning	3
	Priority (0-6 years)	3
	Future (7-10 years)	2
	Long Range (10+ years)	1
	No Planned Service (Septic Tank)	1
	Transportation**: Within ¼ mile of:	
	Interstates, Freeways, Expressways, and Other Principal Arterials (1 and 2 classifications)	3
	Minor Arterials and Major Collectors (3 and 4 classifications)	2
Not within ¼ mile of the above	1	
Concentration of Employment¹		
High – 3,000-5,252	3	
Medium – 1,500-3,000	2	
Low – 500-1,500	1	

¹References CoStar and DataAxle data on the number of employees on a census tract level

Table 24: Acreage of Each Zoning Category in Carroll County

Table 32: Development Opportunity Site Data

SITE IDENTIFICATION							EVALUATED FACTORS								
Site ID Number	Site Name	Parcel Arrangement	Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres	Infrastructure Capacity				Concentration of Employment	Zoning Compatibility of Adjacent Sites/Uses**	Specific Zoning or FLU Overlays	Other Transportation Considerations	Notes:
							Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification ¹					
1	Pank Land LLC	Single (1)	Mount Airy	0133	Greenfield	39	Priority (0-6yr)	Priority (0-6yr)	I-70	1U	Medium	North: Community Commercial (Outdoor athletic fields, Mt. Airy Fire Company carnival grounds and banquet hall) South: Conservation Land (I-70) East: Industrial (Partially vacant, and a junkyard) West: Industrial (Repair shops, and towing company)	N/A	Access to I-70 is approx. 1 mile away from site. Closest access is along MD 27, classified 2U.	The current owner is soliciting proposals for development for industrial uses.
2	Avondale Road Property	Single (1)	Unincorporated County (Westminster)	46	Greenfield	82	Priority (0-6yr)	Existing	MD 31	2U	Low	North: I-G, I-2 (wastewater treatment plant) South: Agricultural, I-2 East: Conservation, I-2 West: I-2	N/A	Existing site access on Avondale Road.	
3	TownMall of Westminster	Multiple (2)	Westminster	2743	Redevelopment	53	Existing	Existing	MD 140	2U	High	North: Business, Restricted Industrial (Self storage, USPS, Walmart, and Goodwill) South: Planned Regional Shopping Center (Cranberry Square Shopping Plaza) East: Planned Development, Residential (Vacant) West: Business (Fast food restaurants, and CVS), Conservation (Vacant)	N/A	There are three existing points of ingress/egress surrounding the site.	Some of the anchors such as Sears, Belk, etc. own their building footprint. This will have an impact on redevelopment.
				2743	Redevelopment	2	Existing	Existing							
4	John Frock Site	Single (1)	Unincorporated County (Westminster)	0312	Greenfield	90 (approx. 17 ac. are zoned I-1)	Existing	Existing	MD 97	3U	Medium	North: I-1, I-R (Finch Services), R-10,000 (Single-family homes) South: I-1 (Vacant), R-40,000 (Agriculture) East: R-40,000 (Single-family homes) West: I-1 Light Industrial (Warehouse, commercial)	N/A	Existing site access on Old Bachmans Valley Road	
5	Long Meadow Farm (Beaty Property)	Single (1) (Multiple Zoning Designations on one parcel - calculated only on the Industrial-zoned portion)	Unincorporated County (Freedom)	0247	Greenfield	118 (49.7 ac. zoned for Industrial use)	Existing	Existing	Bennett Road	4U	Medium	North: Residential R-20,000 (vacant) South: Residential R-20,000 (vacant) East: Residential R-20,000 (vacant) West: Light Industrial (Manufacturing, large concentration of commercial and industrial uses)	N/A	Multiple potential access points exist, all in proximity to MD 32 and MD 26.	Fair amount of transportation improvement would be necessary to develop the parcel
							Existing	Existing							
							Existing	Existing							

¹ <https://www.carrollcountymd.gov/media/1675/fclass-list.pdf>

Table 32: Development Opportunity Site Data (Continued)

SITE IDENTIFICATION							EVALUATED FACTORS								
Site ID Number	Site Name	Parcel Arrangement	Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres	Infrastructure Capacity				Concentration of Employment	Zoning Compatibility of Adjacent Sites/Uses**	Specific Zoning or FLU Overlays	Other Transportation Considerations	Notes:
							Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification ¹					
6	West Branch 1	Single (1)	Westminster	4836	Greenfield	20.5	Existing	Existing	MD 97	3U	Low	North: Restricted Industrial (Vacant Maples property) South: Restricted Industrial (Tri-County Roofing & Sheet Metal company) East: Agriculture (Vacant AG Preservation) West: Planned Industrial (Knorr Brake)	N/A	Fronting Magna Way with existing infrastructure in place to access all parcels.	
7	North Carroll Business Park (Owned by the Industrial Development Authority)	Multiple (5)	Hampstead	0762	Greenfield	34.8	Priority (0-6yr)	Priority (0-6yr)	MD 30	2U	Low	North : Light Industrial (Public storage facility, concrete, plumping and auto service company), Residential (Vacant) South: Restricted Industrial (Fuchs, and Ridge Engineering), Public Conservation (North Carroll High School) East: General Business (Concentration of industrial and commercial uses), Residential (Single and multi-family development) West: Public Conservation (Vacant)	N/A	Large trucks are restricted from turning right (south) out of the site and are encouraged to use the bypass route.	
	0059			Greenfield	39.2	Priority (0-6yr)	Priority (0-6yr)	N/A							
	0806			Greenfield	0.91	Priority (0-6yr)	Future (7-10yr)	N/A							
	0807			Greenfield	0.91	Priority (0-6yr)	Future (7-10yr)	N/A							
	0807			Greenfield	0.34	Priority (0-6yr)	Future (7-10yr)	N/A							

¹ <https://www.carrollcountymd.gov/media/1675/fclass-list.pdf>

Table 32: Development Opportunity Site Data (Continued)

SITE IDENTIFICATION							EVALUATED FACTORS									
Site ID Number	Site Name	Parcel Arrangement	Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres	Infrastructure Capacity				Concentration of Employment	Zoning Compatibility of Adjacent Sites/Uses**	Specific Zoning or FLU Overlays	Other Transportation Considerations	Notes:	
							Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification ¹						
8	Warfield at Historic Sykesville	Multiple (23)	Sykesville	1356-4-1 and all 0689 parcels	Redevelopment	17.7	Existing	Existing	MD 32	2U	Low	<p>North: Agriculture (Maryland Police and Correctional Training facility, Springfield Hospital Center and supporting facilities)</p> <p>South: Heavy Industrial (Northrop Grumman , Sykesville Middle School, and Central Maryland Correctional Facility)</p> <p>East: Agriculture (Office and Maintenance facilities)</p> <p>West: Planned Employment Campus (Vacant)</p>	Historic District	Warfield Ave is a collector road that cuts through the site.		
				1356-4-1	Greenfield	6.9	Existing	Existing					Historic District			
				1356-4-1	Greenfield	3.4	Existing	Existing					Historic District			
				1356-4-1	Greenfield	2.5	Existing	Existing					Historic District			
				1356-4-1	Greenfield	1.8	Existing	Existing					Historic District			
9	Intergrace INC	Single (1)	Sykesville	0688	Greenfield	22.7	Existing	Priority (0-6yr)	MD 32	2U	Low	<p>North: Conservation (One single family residence, otherwise mostly vacant)</p> <p>South: Residential (Vacant)</p> <p>East: Planned Employment Campus (Parkside Condominium Complex)</p> <p>West: Conservation, Residential (Fairhaven Retirement Community)</p>	N/A	Along MD 32 with one existing ingress/egress.		
10	Dulaney Property	Multiple (3)	Unincorporated County (Eldersburg)	0016	Greenfield	50	Priority (0-6yr)	Priority (0-6yr)	Klee Mill Road	5U	Medium	<p>North: Agricultural (Single-family homes), Conservation</p> <p>South: Agricultural (Century High School, Linton Springs Elementary School)</p> <p>East: Agricultural</p> <p>West: Agricultural (Homestead-Sun Valley Assisted Living Facility), Light Industrial (Industrial Park)</p>	N/A	Ronsdale road separates the two largest connected parcels from the smaller 23 acre parcel and may create more site access.		
				0484	Greenfield	39	Priority (0-6yr)	Priority (0-6yr)					N/A			
				0490	Greenfield	29	Priority (0-6yr)	Priority (0-6yr)					N/A		Within close proximity to MD 26.	

¹ <https://www.carrollcountymd.gov/media/1675/fclass-list.pdf>

Table 32: Development Opportunity Site Data (Continued)

SITE IDENTIFICATION							EVALUATED FACTORS									
Site ID Number	Site Name	Parcel Arrangement	Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres	Infrastructure Capacity				Concentration of Employment	Zoning Compatibility of Adjacent Sites/Uses**	Specific Zoning or FLU Overlays	Other Transportation Considerations	Notes:	
							Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification ¹						
11	Wakefield Valley Road LLC	Single (1)	Unincorporated County (New Windsor)	0016	Greenfield	25	Long Range (10+)	Long Range (10+)	MD 31	2R	Very Low	North: Agricultural South: Light Industrial (Vacant) East: Agricultural West: Light Industrial (Solar farm)	Employment Campus	No existing ingress/egress. The site could provide access from MD 31 along the southern edge or Wakefield Valley Road along the western edge of the site.		
12	K & P Resource Recovery LLC	Multiple (3)	Unincorporated County (Westminster)	0527	Greenfield	85	No Planned Service (Well Water)	No Planned Service (Septic Tank)	MD 140	2U	High	North: Agriculture (Vacant) South: Commercial Medium (Automotive businesses), Residential (Single family residential) East: Agriculture (Landfill) West: Commercial Medium (Public storage), Agriculture (Vacant)	N/A	Indication of two existing points of ingress/egress off of MD 140.		
				1643	Greenfield	17	No Planned Service (Well Water)	No Planned Service (Septic Tank)					N/A			
				1642	Greenfield	13	No Planned Service (Well Water)	No Planned Service (Septic Tank)					N/A			
13	Maples Property	Multiple (2)	Westminster	7179	Greenfield	29.6	Priority (0-6yr)	Priority (0-6yr)	MD 97	3U	Low	North: Agricultural (Church) South: Planned Industrial (Knorr Brake), Restricted Industrial (Vacant) East: Agriculture (Agricultural preservation land) West: R-40,000 (Single family development)	N/A			
				7176	Greenfield	15.0	Priority (0-6yr) Existing	Priority (0-6yr) Existing					N/A			

¹ <https://www.carrollcountymd.gov/media/1675/fclass-list.pdf>

Table 32: Development Opportunity Site Data (Continued)

SITE IDENTIFICATION							EVALUATED FACTORS								
Site ID Number	Site Name	Parcel Arrangement	Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres	Infrastructure Capacity				Concentration of Employment	Zoning Compatibility of Adjacent Sites/Uses**	Specific Zoning or FLU Overlays	Other Transportation Considerations	Notes:
							Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification ¹					
14	David Luther Beck 2	Single (1)	Mount Airy	0004	Greenfield	39	Mix of Existing, Priority, and Long Range	Mix of Existing, Priority, and Long Range	Ridge Road	2U	Very Low	North: R2 Residential (Medical offices, church, park) South: R3 Residential (Swim club, single-family homes) East: MD 27, MXD (Vacant land), R7 Residential (Church) West: Commercial (Concentration of flex and warehouse uses), R3 Residential (Single-family homes)	N/A	Center Street runs partially through the middle of the parcel providing access from the east and west edge of the site.	
15	David Luther Beck 1	Single (1)	Mount Airy	0004	Greenfield	37	Long Range (10+)	Long Range (10+)	MD 27	2U	Very Low	North: R-40,000 (Mostly Vacant) Industrial (Self Storage) East: MD 27, MXD (Vacant), R3 Residential (Swim Club) West: Industrial (Self Storage), R7 Residential (Multi-family homes)	N/A	The site topography may not allow access from MD 27.	A proposed development is currently going through the entitlement process.
					Greenfield	17	Priority (0-6yr)	Priority (0-6yr)	Ridge Road	2U	Very Low		N/A	Mount Airy Waste Water Plant has a private road that runs along the northern edge of the site.	
16	Hoffman Emily F Trustee ETAL	Single (1)	Taneytown	0833	Greenfield	22 (zoned GBD, 94 ac. in total)	Long Range (10+)	Long Range (10+)	MD 140	2U	Very Low	North: Agricultural Northeast/Northwest: R-10,000 (Single-family homes) South: Agricultural Southwest: General Business East: Agricultural	N/A	Located at the round-about intersection of MD 140 and MD 832. There is indication of two unpaved points of existing ingress/egress off of Sells Mill Road.	
17	Larry D Ohler	Single (1)	Unincorporated County (Taneytown)	0067	Greenfield	66	Long Range (10+)	Long Range (10+)	MD 194	2U	Low	North: Downtown Business (Antrim 1844 4-Star Hotel) South: Agriculture (Vacant) East: Residential (Single family development, partly vacant) West: Restricted Industrial (Vacant)	N/A	Unpaved site access off of Trevanion road.	

¹ <https://www.carrollcountymd.gov/media/1675/fclass-list.pdf>

Table 32: Development Opportunity Site Data (Continued)

SITE IDENTIFICATION							EVALUATED FACTORS									
Site ID Number	Site Name	Parcel Arrangement	Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres	Infrastructure Capacity				Concentration of Employment	Zoning Compatibility of Adjacent Sites/Uses**	Specific Zoning or FLU Overlays	Other Transportation Considerations	Notes:	
							Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification ¹						
18	Harrison Leishear Property	Multiple (4)	Unincorporated County (Mount Airy)	0230	Greenfield	153	Priority (0-6yr)	Priority (0-6yr)	MD 27	2U	Low	North: Conservation, R-40,000 (forest, agriculture) South: R-20,000, R-40,000 East: Conservation (single-family homes) West: CC Commercial, R2 Residential, R-40,000	N/A	Existing access on Leishear Road. Existing informal access on Boteler Road. Potential access on MD 27.		
				0026	Greenfield	10	Priority (0-6yr)	Priority (0-6yr)					N/A			
				0046	Greenfield	83	Priority (0-6yr)	Priority (0-6yr)					N/A			
				1487-1	Greenfield	8	Priority (0-6yr)	Priority (0-6yr)					N/A			
19	Deer Haven LLC	Single (1)	Unincorporated (Westminster)	0003	Greenfield	44	No Planned Service (Well Water)	No Planned Service (Septic)	N Center Street	4U	High	North: Conservation (Forested), PUD (Townhomes) South: R-10,000 (Cranberry Station Elementary School) East: Conservation (Forested) West: R-10,000 (Single-family homes)	N/A	Access along Cranberry Road on the west side of parcel		
20	Joan Smith and Mary Lou Bullock Co Trustees	Single (1)	Unincorporated (Taneytown)	0104	Greenfield	53 (only includes parcel area north of Old Taneytown Road)	Mix of Long Range and No Planned Service	Mix of Long Range and No Planned Service	MD-140	2R	Low	North: R-10,000, General Business (Vacant) South: Agricultural East: Agricultural West: Agricultural, C-2 (Bank, restaurant)	N/A	Potential access from Old Taneytown Road		
21	Carroll County Commerce Center 1	Single (1)	Westminster	4966	Greenfield	5.1	Existing	Existing	MD 140	2U	Medium	North: Planned Industrial (Royal Farms) South: Planned Industrial (Commerce Center) East: Planned Industrial (Commerce Center) West: R-10,000 (Single-family residential)	N/A	There is existing infrastructure in place to support site access.		
22	Carroll County Commerce Center 2	Single (1)	Westminster	4966	Greenfield	3.4	Existing	Existing	MD 97	3U	Medium	North: Light Industrial (Vacant) South: Planned Industrial (Industrial use) East: Residential (Single family development) West: Planned Industrial (Royal Farms)	N/A	There is existing infrastructure in place to support site access.		

¹ <https://www.carrollcountymd.gov/media/1675/fclass-list.pdf>

Table 32: Development Opportunity Site Data (Continued)

SITE IDENTIFICATION							EVALUATED FACTORS									
Site ID Number	Site Name	Parcel Arrangement	Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres	Infrastructure Capacity				Concentration of Employment	Zoning Compatibility of Adjacent Sites/Uses**	Specific Zoning or FLU Overlays	Other Transportation Considerations	Notes:	
							Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification ¹						
23	Carroll County Commerce Center 3 and Commerce Center-Adjacent (County-owned)	Multiple (2)	Unincorporated County (Westminster)	4966	Greenfield	12.7	Existing	Existing	MD 97	3U	Medium	North: Light Industrial (Agriculture), R-40,000 (Agriculture) South: Planned Industrial Royal Farms, Commerce Center East: R-10,000 (Single-family homes and agriculture) West: Restricted Industrial (MD 97 and vacant), Business	N/A	No current access, but may be available along Corporate Center Ct or MD 97		
				4966	Greenfield	6.2	Existing	Existing			Medium		N/A	No current access, but may be available along Corporate Center Ct or MD 97		
24	Meadow Branch 2	Multiple (2)	Westminster	6784	Greenfield	4.1	Existing	Existing	Meadow Branch Road	4U	Medium	North: Restricted Industrial (vacant) South: R-20,000 East: Restricted Industrial (vacant), Conservation (church and cemetery) West: Restricted Industrial (Shelter Systems)	N/A			
25	Meadow Branch 1	Single (1)	Westminster	0806	Greenfield	16.1	Existing	Existing	Meadow Branch Road	4U	Medium	North/West: Conservation, R-20,000 South: Residential (Single family), Restricted Industrial (Shelter Systems) East: Restricted Industrial (vacant)	N/A	Along Meadow Branch Road.		
26	West Branch 2	Multiple (3)	Westminster	4836-12-14	Greenfield	2.0	Existing	Existing	MD 97	3U	Low	North: Restricted Industrial (West Branch) South: Restricted Industrial (Vacant and Industrial) East: Restricted Industrial (Industrial) West: Light Industrial (Industrial), Commercial (Vacant)	N/A			
				4836-12-14	Greenfield	2.0	Existing	Existing					N/A			

¹ <https://www.carrollcountymd.gov/media/1675/fclass-list.pdf>

Table 32: Development Opportunity Site Data (Continued)

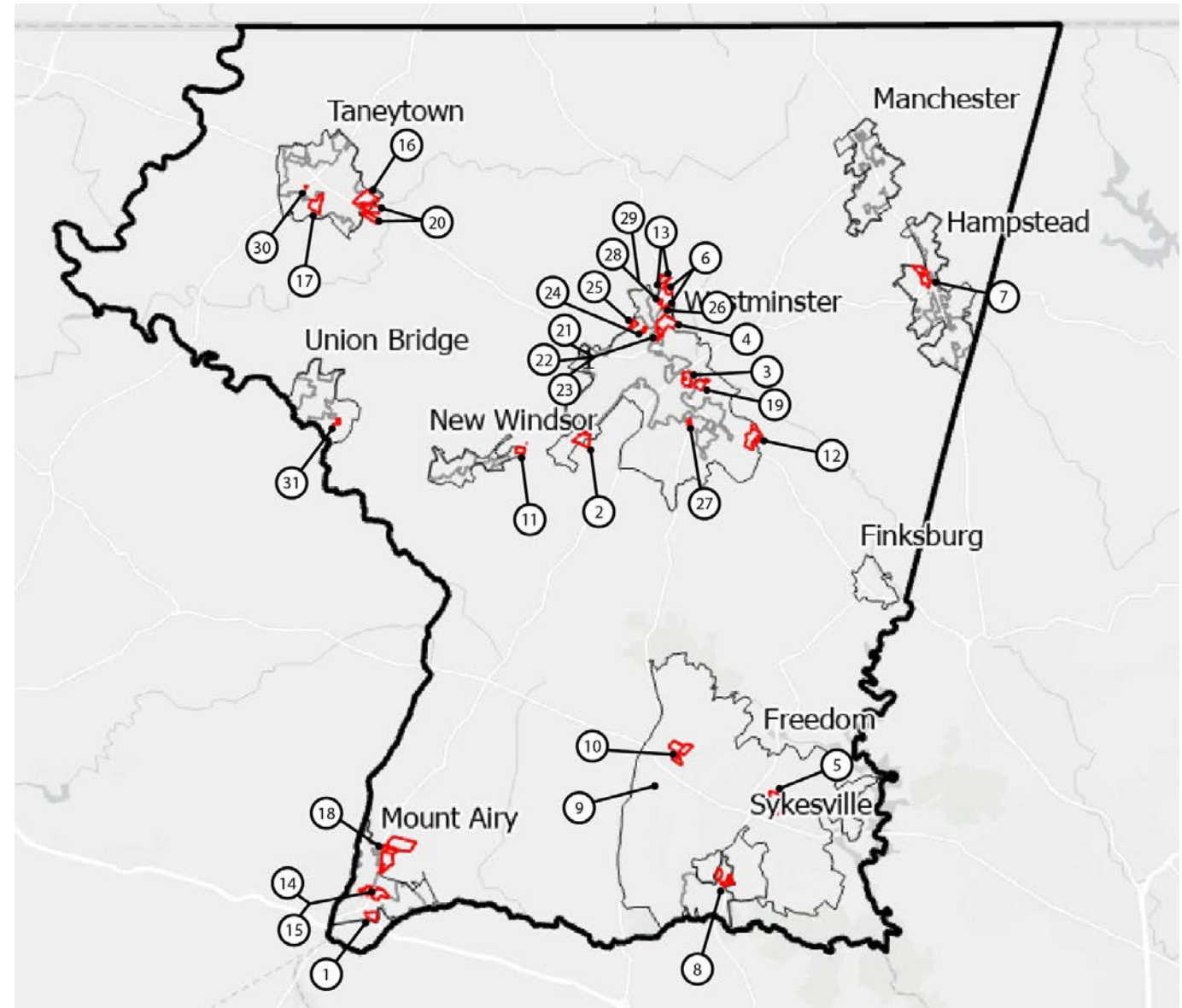
SITE IDENTIFICATION							EVALUATED FACTORS									
Site ID Number	Site Name	Parcel Arrangement	Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres	Infrastructure Capacity				Concentration of Employment	Zoning Compatibility of Adjacent Sites/Uses**	Specific Zoning or FLU Overlays	Other Transportation Considerations	Notes:	
							Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification ¹						
27	Cathie-Sue Partnership	Multiple (2)	Unincorporated County (Westminster)	0595	Redevelopment	7	Existing	Existing	MD 97	3U	High	North: C-2 (Restaurant, medical offices) South: R-10,000 (Single-family homes) East: C-2 (Carroll Fuel Services) West: R-10,000 (Single-family homes), R-7,500 (Westbrooke Apartments)	N/A	Access along north portion of parcel along E Main Street, access along Poole Road on west side of site		
				1507	Greenfield	2	Existing	Existing					N/A	No access along MD 97, connected to main parcel with access along Poole Road		
28	Westminster Tech Park 1	Single (1)	Westminster	4858	Greenfield	7.1	Existing	Existing	MD 97	3U	Low	North: Restricted Industrial (Vacant Maples property) South: Light Industrial (Carwash facility) West: Restricted Industrial (Large concentration of commercial and industrial facilities) East: Planned Industrial (West Branch Technology Park), Business	N/A	There is existing infrastructure in place with access to all parcels.		
29	Westminster Tech Park 2	Single (1)	Westminster	4858-3	Greenfield	2.3	Existing	Existing	MD 97	3U	Low	North: Planned Industrial (Tech Park) South: Light Industrial (Vacant) East: Restricted Industrial (West Branch) West: Planned Industrial (Westminster Tech Park)	N/A	There is existing infrastructure in place with access to all parcels.		
30	Taneytown Industrial Park	Single (1)	Taneytown	0716	Greenfield	2	Long Range (10+)	Long Range (10+)	MD 194	3U	Low	North: General Business (EVAPCO) South: Restricted Industrial (EVAPCO) East: General Business (EVAPCO) West: Restricted Industrial (Taney Corporation)	N/A		Treated as Industrial because parcels are functionally industrial	
31	Board of County Commissioners	Single (1)	Unincorporated County (Union Bridge)	0350	Greenfield	10.4	Long Range (10+)	Long Range (10+)	Shepherds Mill Road	5R	Low	North: Conservation (Vacant) South: Light Industrial (Vacant) East: Light Industrial (Solar Farm) West: Light Industrial (Heidelberg Materials Cement facility)	N/A	No existing site access. Within close proximity to Quaker Hill Rd.		

¹ <https://www.carrollcountymd.gov/media/1675/fclass-list.pdf>

Figure 30: Greenfield and Redevelopment Site Key Map



Industrial Office Space
Image Source: Carroll County Economic Development Department



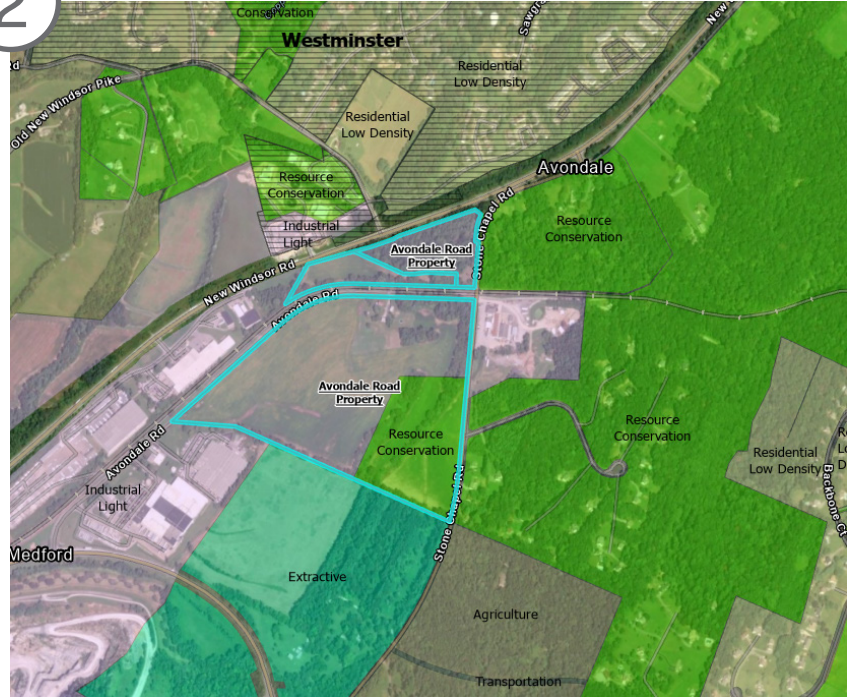
Large Sites

1 Pank Land LLC



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Mount Airy	0133	Greenfield	33
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Priority (0-6yr)	Priority (0-6yr)	I-70	1U

2 Avondale Road Property



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Westminister)	46	Greenfield	82
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Priority (0-6yr)	Existing	MD 31	2U

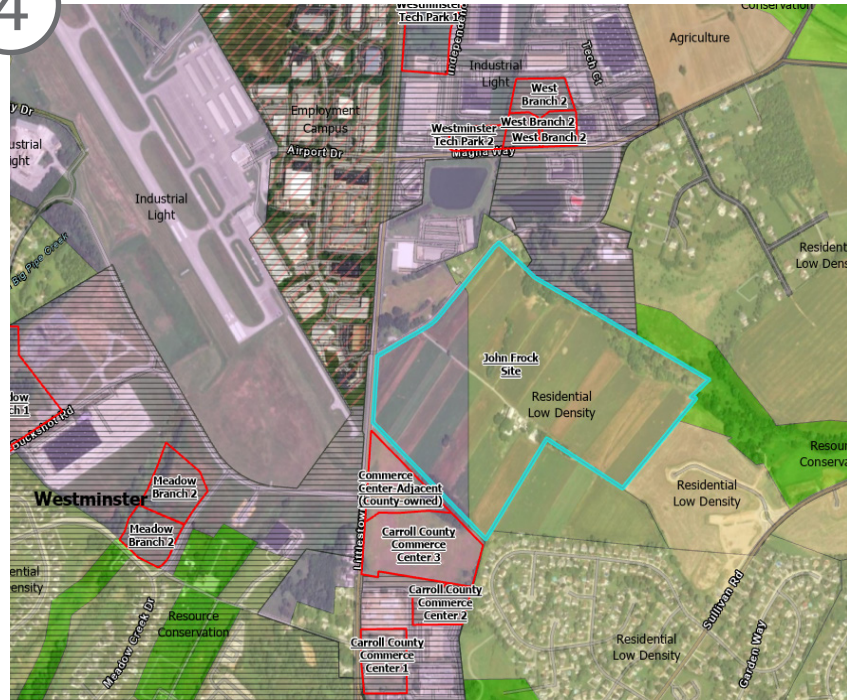
Large Sites

3 TownMall of Westminster



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminster	2743	Redevelopment	52.8
	2743	Redevelopment	2.1
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 140-	2U
Existing	Existing		

4 John Frock Site



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated (Westminster)	0312	Greenfield	89 (approx. 17 ac. are zoned I-1)
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 97	3U

Large Sites

5 Long Meadow Farm (Beaty Property)



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Freedom)	Unincorporated County (Freedom)	Greenfield	118 (49.7 ac. zoned for industrial use)
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	Bennett Road	4U
Existing	Existing		
Existing	Existing		

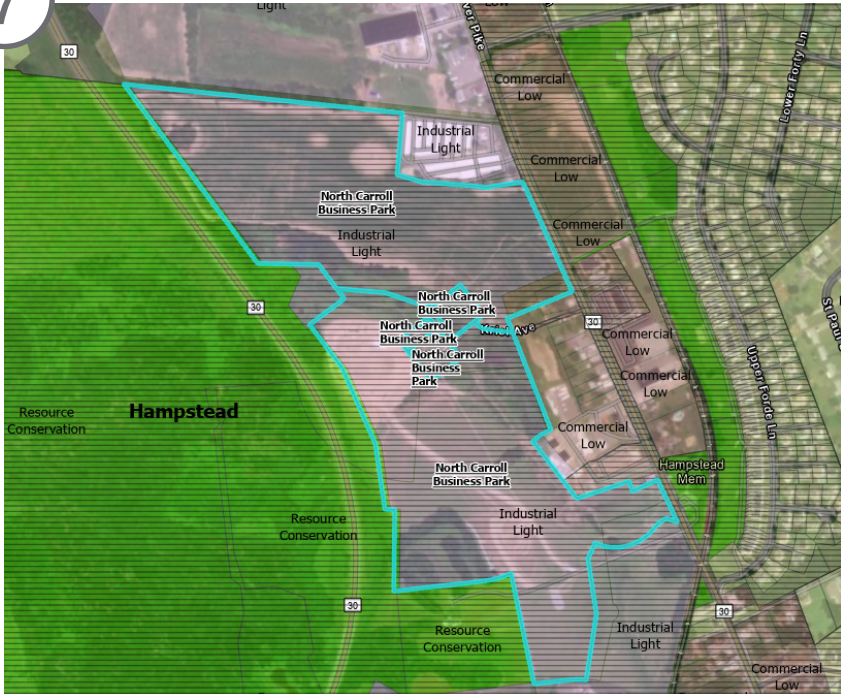
6 West Branch 1



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminster	4836	Greenfield	20.5
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 97	3U

Large Sites

7 North Carroll Business Park



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Hampstead	0762	Greenfield	34.8
	0059	Greenfield	39.2
	0806	Greenfield	0.91
	0807	Greenfield	0.91
	0807	Greenfield	0.34
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Priority (0-6yr)	Priority (0-6yr)	MD 30	2U
Priority (0-6yr)	Priority (0-6yr)		
Priority (0-6yr)	Future (7-10yr)		
Priority (0-6yr)	Future (7-10yr)		
Priority (0-6yr)	Future (7-10yr)		

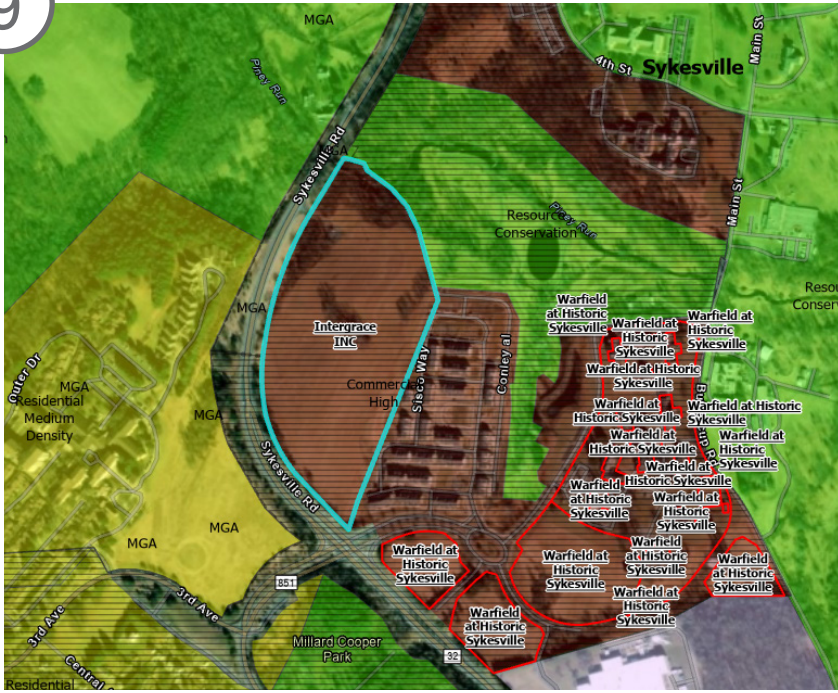
8 Warfield at Historic Sykesville



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Sykesville	"1356-4-1 and all 0689 parcels"	Redevelopment	17.7
	1356-4-1	Greenfield	6.9
	1356-4-1	Greenfield	3.4
	1356-4-1	Greenfield	2.5
	1356-4-1	Greenfield	1.8
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 32	2U
Existing	Existing		
Existing	Existing		
Existing	Existing		
Existing	Existing		

Large Sites

9 Intergrace INC



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Sykesville	0688	Greenfield	22.7
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Priority (0-6yr)	MD 32	2U

10 Dulaney Property



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Eldersburg)	0016	Greenfield	50
	0484	Greenfield	39
	0490	Greenfield	29
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Priority (0-6yr)	Priority (0-6yr)	Klee Mill Road	5U
Priority (0-6yr)	Priority (0-6yr)		
Priority (0-6yr)	Priority (0-6yr)		

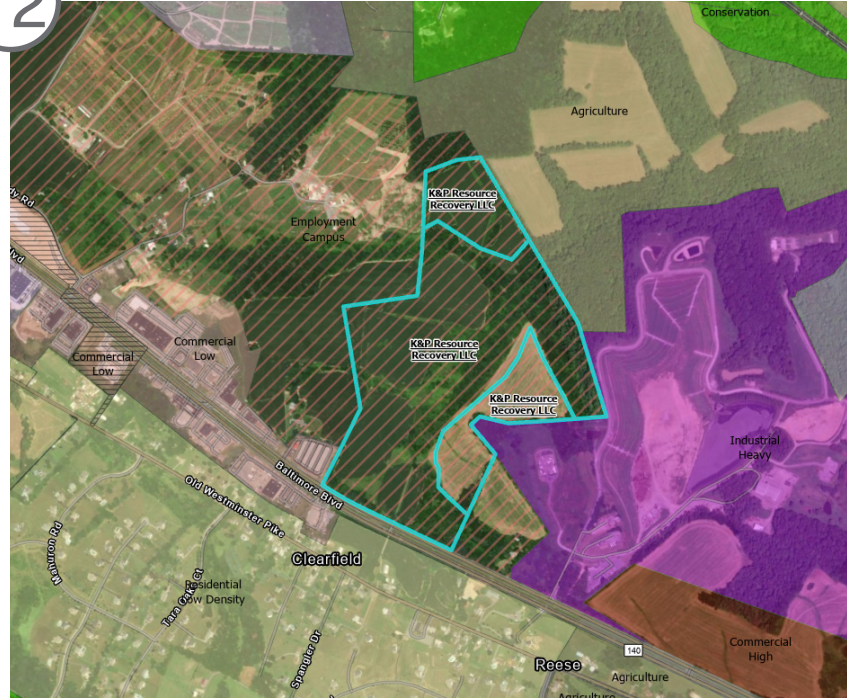
Large Sites

11 Wakefield Valley Road LLC



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (New Windsor)	0016	Greenfield	25
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Long Range (10+)	Long Range (10+)	MD 31	2R

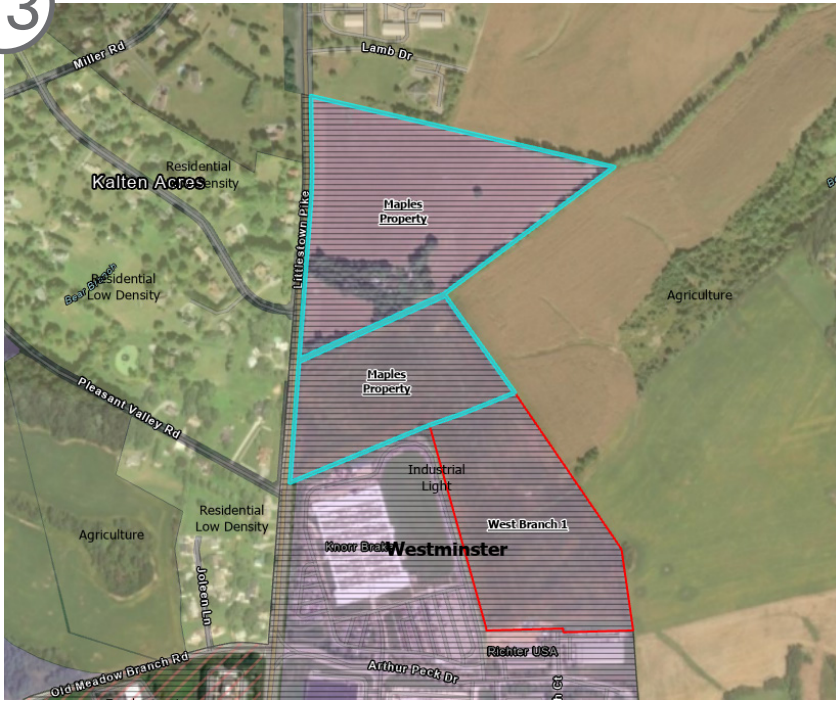
12 K&P Resource Recovery LLC



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Westminster)	0527	Greenfield	85
	1643	Greenfield	17
	1642	Greenfield	13
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
No Planned Service (Well Water)	No Planned Service (Septic Tank)	MD 140	2U
No Planned Service (Well Water)	No Planned Service (Septic Tank)		
No Planned Service (Well Water)	No Planned Service (Septic Tank)		

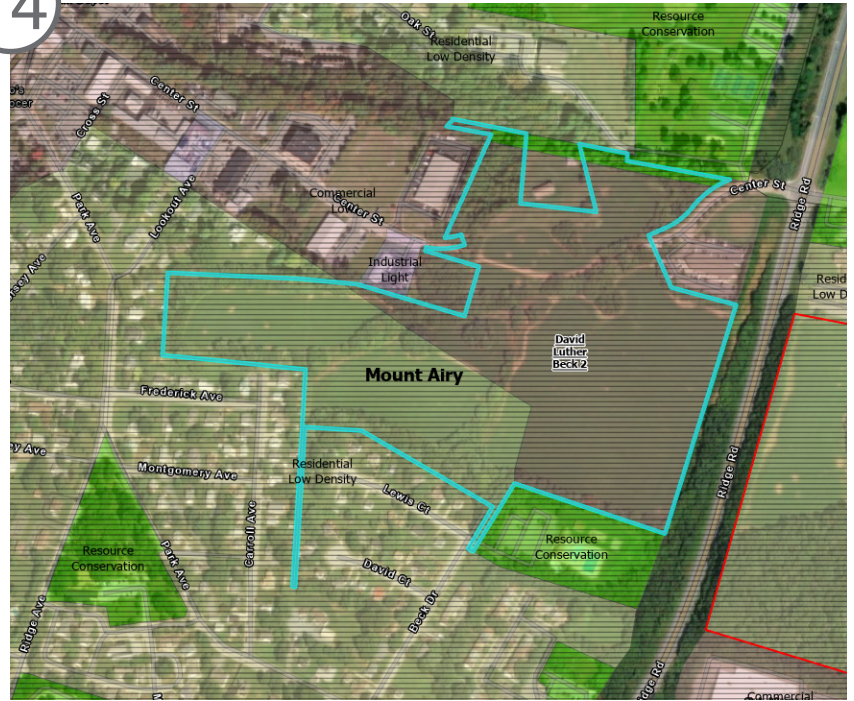
Large Sites

13 Maples Property



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminister	7179	Greenfield	29.6
	7176	Greenfield	15.0
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Priority (0-6yr)	Priority (0-6yr)	MD 97	3U
"Priority (0-6yr) Existing"	"Priority (0-6yr) Existing"		

14 David Luther Beck 2



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Mount Airy	0004	Greenfield	39
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Mix of Existing, Priority, and Long Range	Mix of Existing, Priority, and Long Range	Ridge Road	2U

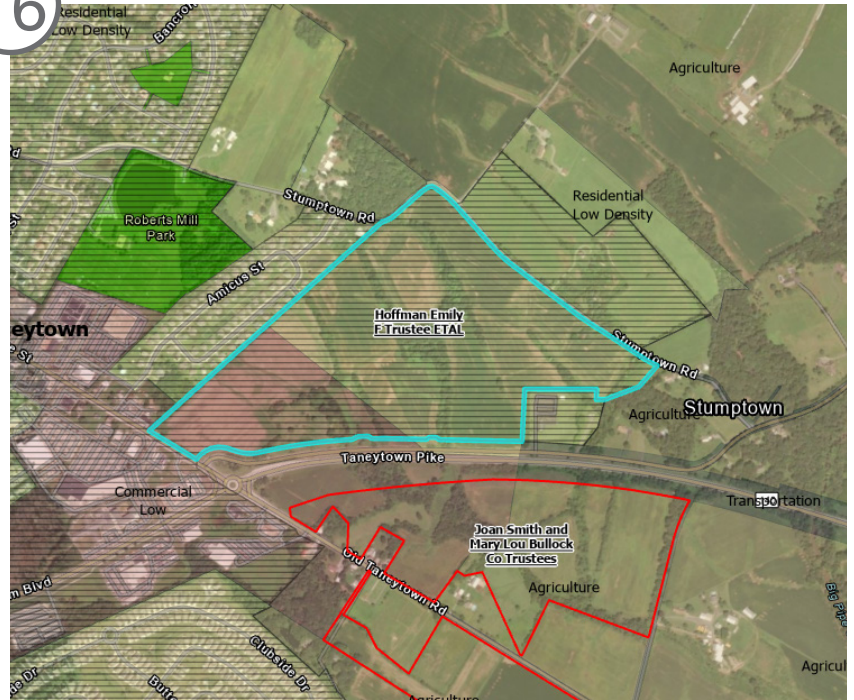
Large Sites

15 David Luther Beck 1



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Mount Airy	0004	Greenfield	37
		Greenfield	17
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Long Range (10+)	Long Range (10+)	MD 27	2U
Priority (0-6yr)	Priority (0-6yr)	Ridge Road	2U

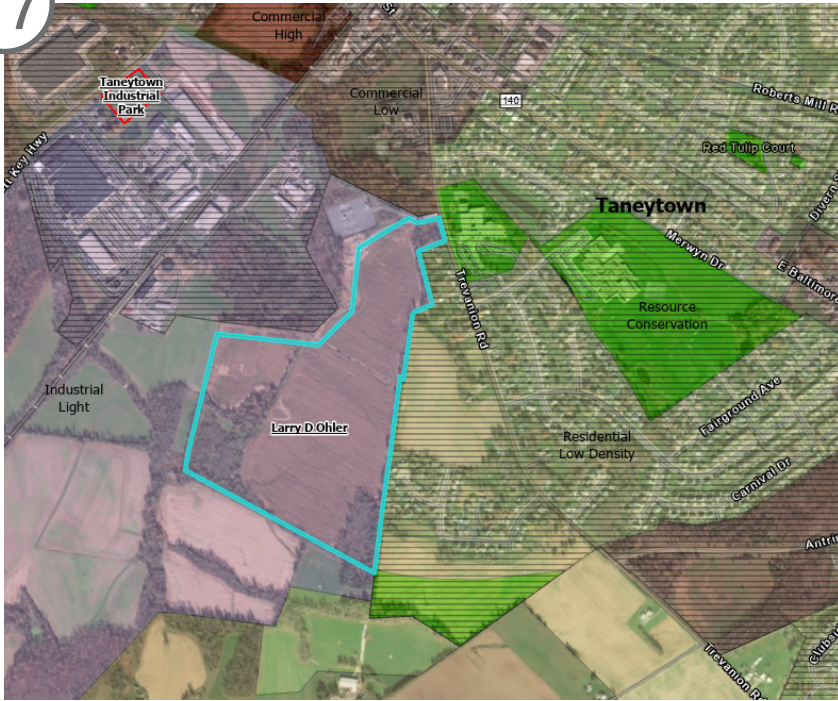
16 Hoffman Emily F Trustee ETAL



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Taneytown	0833	Greenfield	22 (zoned GBD, 94 ac. in total)
Long Range (10+)	Long Range (10+)	MD 140	2U

Large Sites

17 Larry D Ohler



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Taneytown)	0067	Greenfield	66
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Long Range (10+)	Long Range (10+)	MD 194	2U

18 Harrison Leishear Property



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Mount Airy)	0230	Greenfield	153
	0026	Greenfield	10
	0046	Greenfield	83
	1487-1	Greenfield	8
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Priority (0-6yr)	Priority (0-6yr)	MD 27	2U
Priority (0-6yr)	Priority (0-6yr)		
Priority (0-6yr)	Priority (0-6yr)		
Priority (0-6yr)	Priority (0-6yr)		

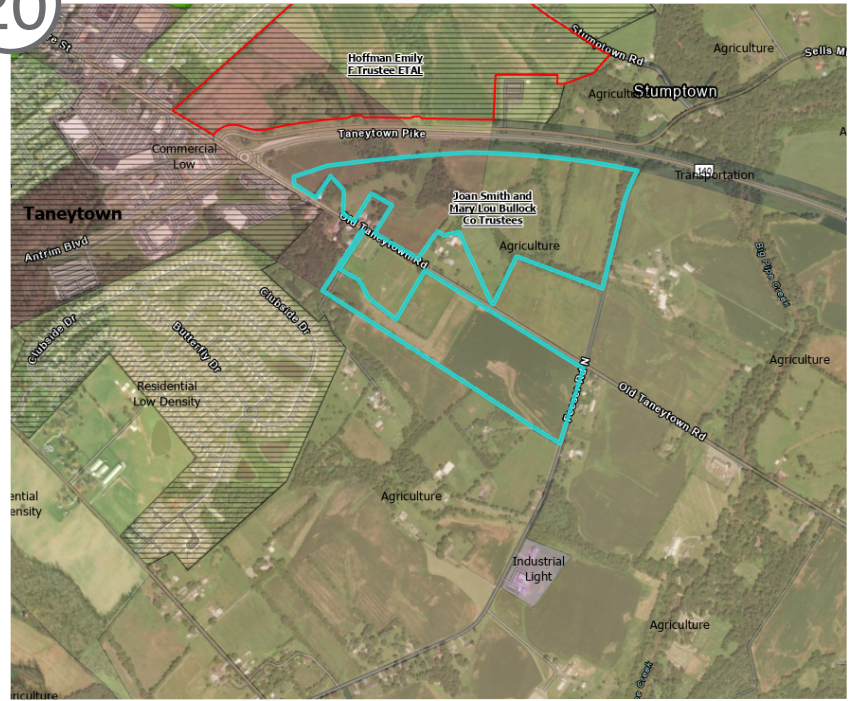
Large Sites

19 Deer Haven LLC



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Westminster)	0003	Greenfield	44
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
No Planned Service (Well Water)	No Planned Service (Septic)	N Center Street	4U

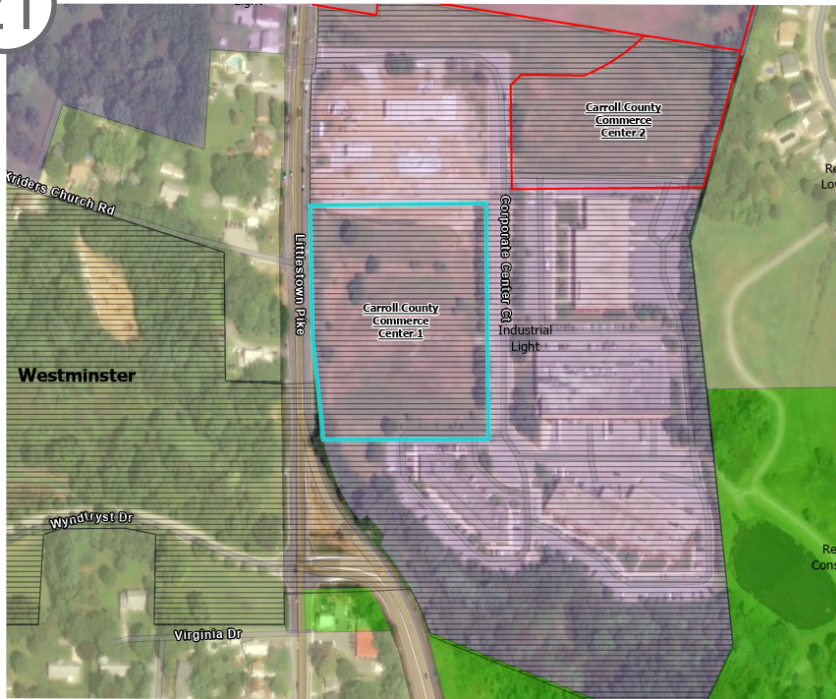
20 Joan Smith and Mary Lou Bullock Co Trustees



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Taneytown)	0104	Greenfield	53 (only includes parcel area north of Old Taneytown Road)
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Mix of Long Range and No Planned Service	Mix of Long Range and No Planned Service	MD-140	2R

Small Sites

21 Carroll County Commerce Center 1



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminster	4966	Greenfield	5.1
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 140	2U

22 Carroll County Commerce Center 2



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminster	4966	Greenfield	3.4
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 97	3U

Small Sites

23 Carroll County Commerce Center 3



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Westminster)	4966	Greenfield	12.7
	4966	Greenfield	6.2
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 97	3U
Existing	Existing		

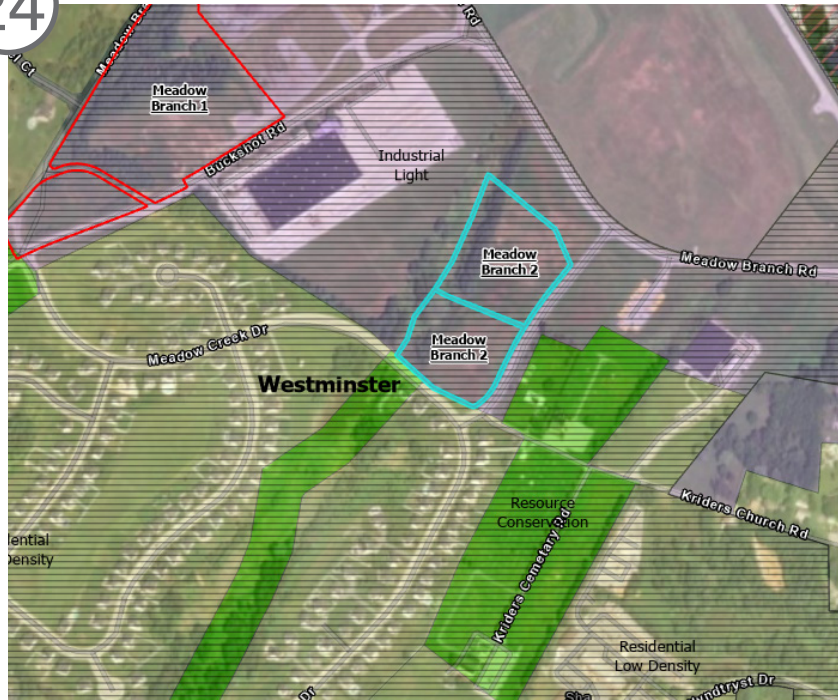
23a Carroll County Commerce Center 3 - Adjacent



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminster	6784	Greenfield	4.1
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	Meadow Branch Road	4U

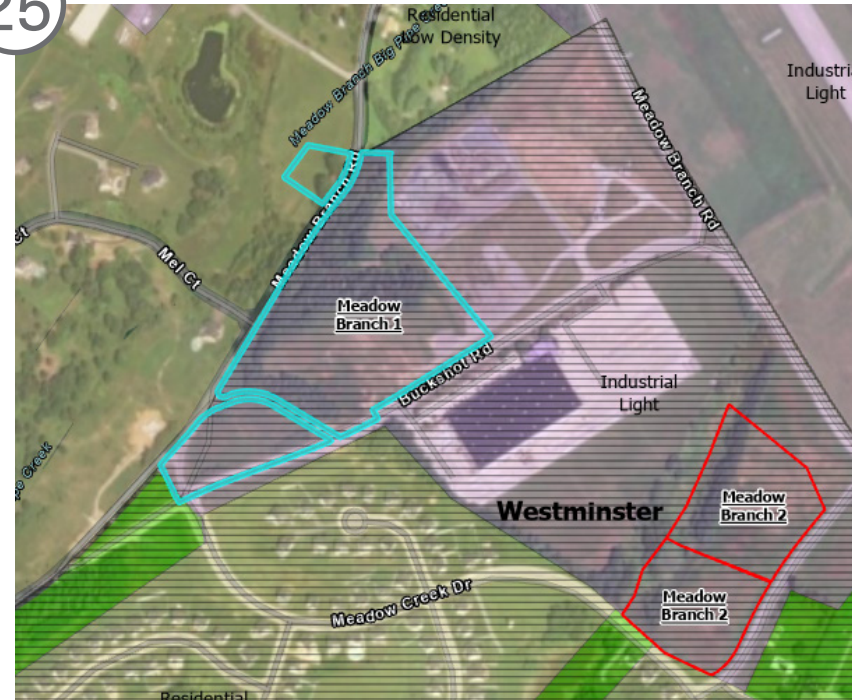
Small Sites

24 Meadow Branch 2



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminister	6784	Greenfield	4.1
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	Meadow Branch Road	4U

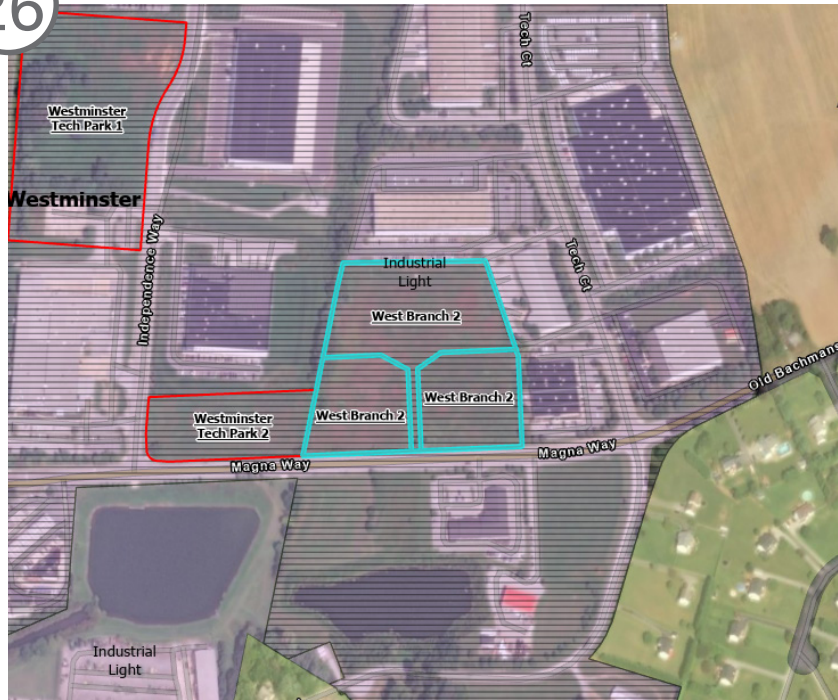
25 Meadow Branch 1



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminister	0806	Greenfield	16.1
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	Meadow Branch Road	4U

Small Sites

26 West Branch 2



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminster	4836-12-14	Greenfield	2.0
	4836-12-14	Greenfield	2.0
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 97	3U
Existing	Existing		

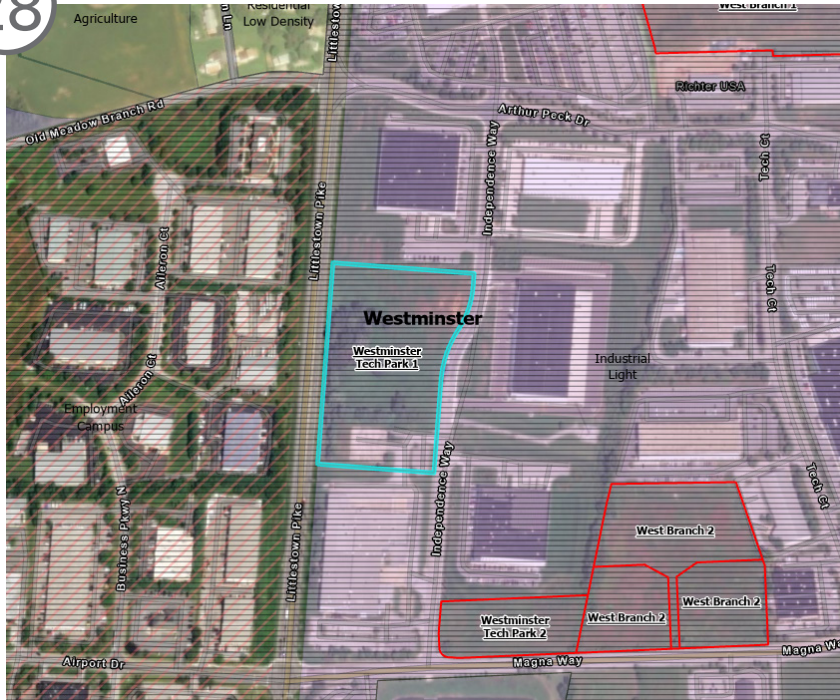
27 Cathie-Sue Partnership



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Westminister)	0595	Redevelopment	7
	1507	Greenfield	2
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 97	3U
Existing	Existing		

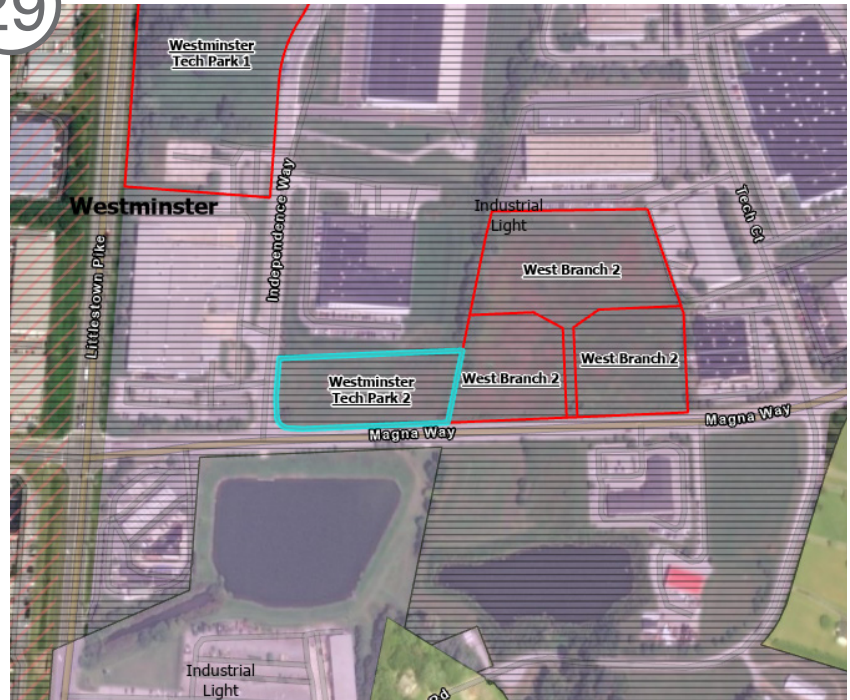
Small Sites

28 Westminster Tech Park 1



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminster	4858	Greenfield	7.1
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 97	3U
Existing	Existing		

29 Westminster Tech Park 2



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Westminster	4858-3	Greenfield	2.3
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Existing	Existing	MD 97	3U

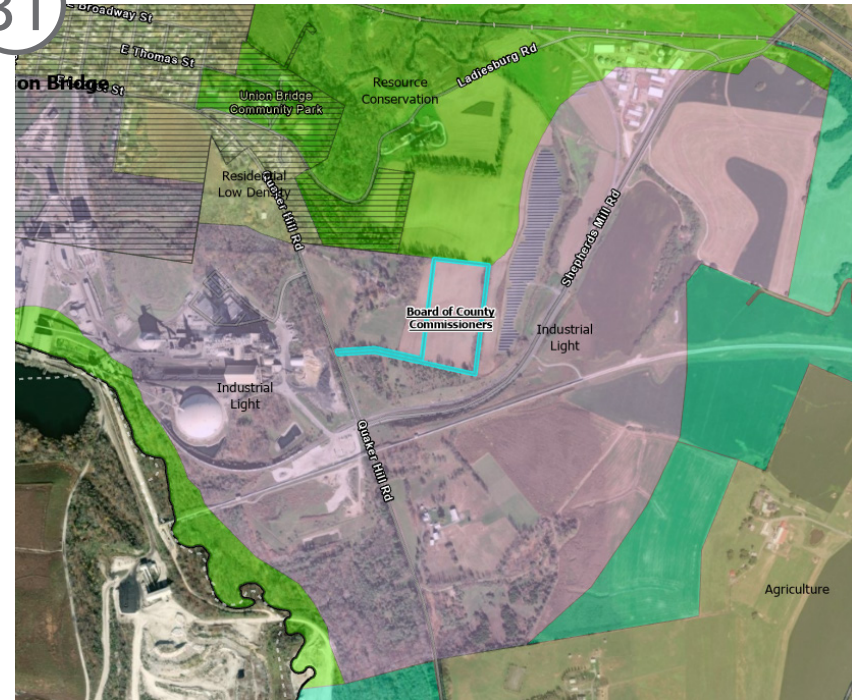
Small Sites

30 Taneytown Industrial Park



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Taneytown	0716	Greenfield	2
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Long Range (10+)	Long Range (10+)	MD 194	3U

31 Board of County Commissioners



Municipal Limits	Parcel ID	Site Type (Greenfield or Redevelopment)	Acres
Unincorporated County (Union Bridge)	0350	Greenfield	10.4
Water Service Area**	Sewer Service Area	Highest Classification Road Within 1/4 Mile	Road Classification
Long Range (10+)	Long Range (10+)	Shepherds Mill Road	5R

Relevant Target Industries

As Carroll County looks to the future, proactively targeting key industry sectors can help support expanding the county's industry and employment composition while preserving the attributes and characteristics that have led to Carroll County's economic development success. Targeted specific industries for growth can help shift status quo patterns and elicit the types of industries and businesses that continue to make Carroll County a desirable community while ensuring the economic vitality of the county's current businesses and workforce.

Economic Development Drivers

The following industries may be particularly suitable for expanded growth in Carroll County. This list of relevant target industries was developed based on the findings in this economic profile, conversations with key stakeholders, and the broader economic development community, leveraging the county's current assets and resources and regional targeted industry growth. At the April 27, 2023 public open house, the public had the opportunity to learn about what the future of all of these industries could look like in Carroll County and provide feedback on which ones they felt would be best suited to pursue.

- Agricultural Production
- Agricultural Technology (Ag. Tech.)
- Agritourism and Hospitality
- Manufacturing
- Defense Contracting
- Biotechnology
- Research and Development (R&D)
- Small Business Incubation
- Information Technology and Data (IT)
- Drone and Autonomous Logistics

Each of these target industries can benefit Carroll County economically, balancing both currently established industries and regional growth sectors. Thoroughly understanding the development feasibility, infrastructure necessities, and positioning within these industries can help ensure that targeted investment and resource allocation achieves successful and valuable economic growth in Carroll County.

Expanded information on the following target industries is provided in the next subsections.

- Agritourism and Hospitality
- Manufacturing
- Small Business Incubation

Agritourism and Hospitality

Industry Overview

The uses that fall under Agritourism in Carroll County and Frederick County are both derived from Maryland state definition for Agritourism which sought to standardize and expand the opportunities offered under the auspices of the use. It is an advisory definition that may be adopted by jurisdictions but it is not mandatory to do so. For example, Harford County's definition does not follow the State's template and diverges more significantly from the other two.



Agritourism
Image Source: Carroll County Economic Development Department

Table 33: Agritourism Requirements

	Carroll County, MD	Frederick County, MD	Harford County, MD
Entitlement	Permitted by right in the Agricultural and Conservation Districts	Permitted by right in all zoning districts	Defined as "Agricultural Public Event" and permitted by right in the Agricultural District
Uses Included in Definition	<ul style="list-style-type: none"> • Farm tours • Hayrides • Corn mazes • Seasonal petting farms • Farm museums • Pumpkin patches • "Pick your own" or "cut your own" produce • Camping and incidental stays provided that they are limited to no more than one campsite • Classes related to agricultural products or skills 	<ul style="list-style-type: none"> • Farm tours • Hayrides • Corn mazes • Seasonal petting farms • Farm museums • Guest farm¹ • Pumpkin patches • "Pick your own" or "cut your own" produce • Classes related to agricultural products or skills • Picnic and party facilities offered in conjunction with the above 	<ul style="list-style-type: none"> • Events related to agricultural vocations, other than temporary uses already permitted in this article², including: • Farm tours • Animal rodeos • Corn mazes • Fee fishing and hunting • Cross country skiing, sledding, pond ice skating • Equestrian trail rentals

Table Source: WGI, July 2023

Data Source: Carroll County, Frederick County, and Harford County Departments of Planning

¹ Defined as "a farm used for temporary rental accommodations of no more than 4 guest rooms, which may include meals for guests only, for the purpose of experiencing farm or ranch activities including horseback riding."

² Uses such as "pick your own" produce and camping and incidental stays are also permitted on farms subject to the corresponding approvals based on intensity, but not explicitly mentioned under the use definition.

Farm Alcohol Producers

Farm alcohol producers (FAPs), including wineries, breweries and cideries, and distilleries were brought up as a potential economic development driver within the wider Agritourism sector. Regional peers, such as Frederick County, have found success in cultivating a wine industry. The National Association of American Wineries estimated the Maryland wine industry's economic impact on the state, finds that Maryland's 77 wine producers are responsible for 22,455 jobs and \$149M in state and local taxes. Additionally, the industry is a tourism draw, creating 157,881 visitor trips and \$53.6M in spending in the state. Vineyards, alongside farm breweries, cideries, and distilleries can contribute to the county's economy while maintaining working farmland.



Serpent Ridge

Image Source: Carroll County Economic Development Department

Table 34: Farm Alcohol Producer Use: Entitlement Requirements

	Carroll County, MD	Frederick County, MD	Harford County, MD
Uses permitted	Brewery, Cidery, and Distillery all covered under the FAP use	Brewery, Cidery, and Distillery all permitted under their own use names	Brewery and Cidery permitted under the “Farm Brewery” use name; No specific use name for Farm Distilleries
Entitlement, production	<p>Conditional</p> <ul style="list-style-type: none"> • Must have a valid Maryland alcohol manufacturer license • Must use an ingredient from a Carroll County agricultural product produced on the licensed farm • May use up to 25 percent of a purchased bulk beverage to blend with the beverage produced on-site 	<p>Permitted, zoning certificate required</p> <ul style="list-style-type: none"> • Breweries must have at least the majority of the hops or one of the primary grains used must be produced on the farm • Wineries must have a minimum of 10 acres and grow 1 acre of fruit for every 2K gallons of wine or juice produced • Distilleries must grow at least one of the grains/fruits used in the distilled product 	<p>Permitted, subject to special-development regulations</p> <ul style="list-style-type: none"> • Must be approved by the Director of Planning • Must show 3 consecutive years of at least \$15,000 in gross ag. income prior to application • Must be owner or tenant operated • Minimum parcel size of 25 acres • Minimum of 2 acres of cultivation area of brewing ingredients
Entitlement, tours and tasting	<p>Included in entitlement for main use, temporary/seasonal uses are subject to the below</p> <ul style="list-style-type: none"> • The floor area for beverage tasting, sales, and food service may not exceed that being used for production and storage of the beverage • No more than 25 percent of the retail sales floor area shall consist of non-agricultural products 	<p>Permitted, subject to site development plan (Planning Commission) approval</p> <ul style="list-style-type: none"> • FAPs may have one accessory structure with no more than 1,500 SF of customer service area for the purpose of conducting tastings 	<p>Included in entitlement for main use</p> <ul style="list-style-type: none"> • Associated structures permitted up to 2,500 SF
Entitlement, special events	<p>Tours and tasting events which exceed site plan approval: temporary zoning certificate Banquet and meeting facilities (incl. weddings): Conditional, BZA and site plan approval required</p>	<p>Not permitted under a FAP use, uses may seek co-approval for a “Facility for Functions” or “Country Inn” use which are only permitted in historic structures</p>	<p>Not permitted under a FAP use, uses may seek co-approval for a “Private parties and receptions” use which are permitted subject to special development regulations exclusively in the Agricultural District</p> <ul style="list-style-type: none"> • Minimum parcel size of 10 acres • Must be approved by the Director of Planning • Must show 3 consecutive years of at least \$15,000 in gross ag. income prior to application • Must be owner or tenant operated

Table Source: WGI, July 2023

Data Source: Carroll County, Frederick County, and Harford County Departments of Planning

When comparing standards across jurisdictions, the processes are relatively similar. FAPs in all three counties require approval from either the Planning Commission or the Director of Planning for production. Carroll County and Harford County have more leniency for tours and tastings on FAPs, with these activities being included in the overall entitlement for the site, whereas Frederick County separates them into two separate uses. Similarly, Carroll County entitles banquet and meeting facilities more

leniently than its peers. Carroll County permits them conditionally on any FAP use, whereas Frederick County permits them independently of FAPs but requires them to be in existing historic structures in the case of Facility for Functions uses. This points to other factors being responsible for Carroll County’s lower amount of FAPs and associated event uses. These include number and quality of hotels and larger local population for an employment and visitor base.

Manufacturing

Industry Overview

The manufacturing industry encompasses the creation of various goods through processes like assembly, fabrication, and the transformation of raw materials. It comprises diverse subsectors, spanning aerospace, electronics, food processing, and machinery production. Carroll County's private sector industries contribute significantly to its economic output, generating a substantial \$6.3 billion. Key players in manufacturing and distribution within the county include well-established firms such as Northrop Grumman, Penguin Random House, Flowserve, EVAPCO, and Fuchs North America. Notably, recent developments in the county have witnessed the expansion or relocation of companies like Ridge Engineering, Hexagon Purus, and Penguin Random House. Table 35 lists the top 10 manufacturing companies in the state of Maryland.

Table 35. Top 10 Manufacturing Companies in Maryland

Company	Employees	City	State
Northrop Grumman Corp.	8,000	Linthicum	MD
Ciena Corp.	4,500	Hanover	MD
AstraZeneca Pharmaceuticals LP	3,500	Gaithersburg	MD
Becton, Dickinson & Co.	3,000	Hunt Valley	MD
BD Diagnostic Systems	2,000	Sparks	MD
Under Armour, Inc.	2,000	Baltimore	MD
Emergent BioSolutions, Inc.	1,800	Gaithersburg	MD
Volvo Group North America, LLC	1,750	Hagerstown	MD
Textron Systems Corp.	1,400	Hunt Valley	MD
Hughes Network Systems, LLC	1,210	Germantown	MD

Table Source: WGI, July 2023
Data Source: industryselect.com

Carroll County can be a suitable location for manufacturing expansion due to the following reasons, the county has a well-educated and skilled workforce, making it attractive to manufacturers requiring specialized labor, it is strategically located near major markets like Baltimore and Washington, D.C., facilitating distribution and access to consumers, and Carroll County offers good transportation infrastructure, including highways and railroads, which can facilitate the movement of goods.

Entitlement Requirements

Establishing or expanding a manufacturing facility in Carroll County, like in many jurisdictions, involves complying with use and entitlement requirements.

Zoning and Land Use - Manufacturers must select sites that are appropriately zoned for industrial use, ensuring that their intended manufacturing activities align with local zoning regulations.

Building Permits - Manufacturing facilities usually require building permits to ensure that they meet safety and construction code standards.

Environmental Regulations - Manufacturers may need to adhere to environmental regulations related to emissions, waste management, and water usage. Compliance often involves obtaining permits from relevant agencies.

Infrastructure Access - Ensuring access to essential infrastructure like utilities (water, electricity, gas), transportation, and broadband internet is crucial for smooth manufacturing operations.

Economic Development Opportunities and Industry-Specific Challenges

Several factors can drive economic development in the manufacturing industry. Workforce development- investing in workforce development programs can enhance the skills of the local labor force and make it more attractive for manufacturers. Incentives and Tax Benefits providing tax incentives, grants, or subsidies to manufacturers can encourage growth and job creation. Innovation and Technology promoting innovation and technology adoption within the manufacturing sector can lead to more advanced and competitive operations. Public-private partnerships between local government, educational institutions, and private manufacturers can foster a supportive

ecosystem for the industry's growth. Challenges in manufacturing include supply chain disruptions, workforce recruitment, and compliance with evolving environmental regulations. For successful growth opportunities in the manufacturing industry in Carroll County, businesses should engage with local authorities, like the Carroll County Economic Development Department, to navigate regulations, identify suitable locations, and access available incentives. A comprehensive market analysis and tailored business plan for specific manufacturing niches are essential for long-term success in this industry. Additionally, fostering a supportive ecosystem for innovation and entrepreneurship can be a significant driver of growth.



Manufacturing Industry
Image Source: Carroll County Economic Development Department

Small Business Incubation

Industry Overview

Small Business Incubation involves providing support and resources to startup and early-stage companies, helping them grow and succeed. This support may include shared office spaces, mentorship, access to funding, networking opportunities, and educational programs. Small Business Incubation can be suitable for growth opportunities in Carroll County due to the following reasons, entrepreneurial ecosystems, the state of Maryland has a robust entrepreneurial ecosystem, with access to venture capital, research institutions, and a skilled workforce. This environment is conducive to nurturing startups. Continuous access to major markets, and the proximity to major markets like Washington, D.C., Baltimore, and surrounding counties provide startups with valuable market opportunities and access to potential customers and investors. Lastly, Carroll County should support initiatives that offer various supportive initiatives, including grants, tax incentives, and mentoring programs, which can be advantageous for small businesses.

Entitlement Requirements

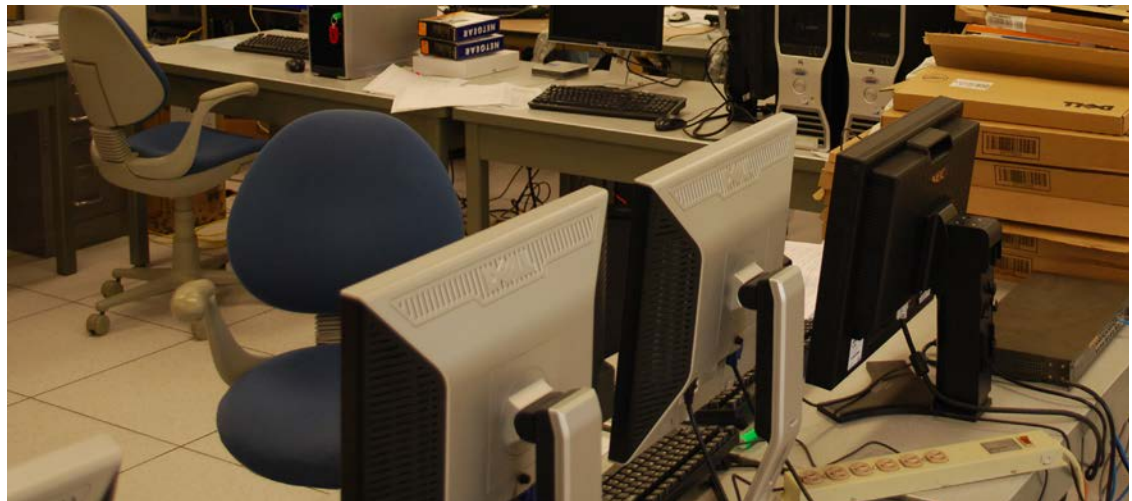
Establishing and expanding small business incubation centers in Carroll County involves the following entitlement requirements.

Zoning and Land Use - Ensuring that the chosen location is appropriately zoned for office or commercial use. Zoning regulations determine the types of businesses allowed in specific areas.

Building Permits - Manufacturing facilities usually require building permits to ensure that they meet safety and construction code standards.

Infrastructure Access - Securing access to essential infrastructure such as utilities (electricity, water, internet), transportation, and communication services.

Licensing and Compliance - Ensuring that the incubation center complies with all local, state, and federal business licensing and regulatory requirements.



Shared Work Stations
Image Source: Carroll County Economic Development Department

Economic Development Opportunities and Industry-Specific Challenges

Economic development drivers for the Small Business Incubation industry in Carroll County include access to capital ensuring startups have access to venture capital, grants, and low-interest loans to facilitate their growth. Offering educational programs, mentorship, and training for entrepreneurs to develop their skills and knowledge. Creating platforms for startups to connect with mentors, investors, and potential partners. Collaborating with local government, educational institutions, and private enterprises to provide resources and support for small businesses and provide tax incentives for businesses that invest in and support small business incubation initiatives. Lastly, some challenges in small business incubation can include securing funding for startups, attracting entrepreneurs to the area, and providing adequate resources, mentorship, and networking opportunities. To successfully drive the Small Business Incubation industry in Carroll County, a collaborative approach involving local government, educational institutions, and private enterprises is crucial. Creating an environment that supports innovation, entrepreneurship, and access to capital is vital for the growth of startups and early-stage companies. Additionally, promoting the success of Carroll County's location and existing business ecosystem can attract entrepreneurs and encourage them to establish and grow their businesses in the region.



Mount Airy
Image Source: Carroll County Economic Development Department

Economic Development Tools and Incentive Mechanisms

Business Attraction and Development

According to the Carroll County Department of Economic Development, the County has several incentives and tools for business attraction and development. There are business retention efforts and visits as well as a customer relationship management database (CRM). The County also offers services of the Workforce Development Center and Small Business Development Center. These efforts attempt to encourage both workers and entrepreneurs to start and grow their businesses within the county. The Department of Economic Development cited a need for a community liaison within the County.

At a regional level, the Economic Alliance of Greater Baltimore provides marketing support for the County as it helps to advertise the county to prospective employers and workers.

Priority and Expedited Reviews

Site Development Process

In researching practices performed in comparison jurisdictions, there are no instances of priority or expedited reviews for the site development process. However, Anne Arundel County offers an expedited review program, at the expense of the applicant, where a County-approved Certified Reviewer is selected to conduct the plan review of applicable engineered plans for any subdivision or site development application in lieu of County staff. The results of this review are verified by County staff on an expedited basis prior to final approval.

Carroll County has recently implemented a process by which the Board of County Commissioners may identify a priority project. That project is given special consideration by staff including advancement to the front of review queues in County agencies. Due to the special considerations afforded priority projects, resources are only available to accommodate a

couple of priority projects at any one time. This process is relatively new, and the benefits have not yet been determined.

Building Construction Process

Carroll County does not have an expedited review process for building permits; thus, a review was conducted of comparison jurisdictions to determine if there is an expedited review process that should be considered by Carroll County. See Table 36 for further information.

Through the review of comparison jurisdictions, Carroll County may want to consider that building permits associated with the development review priority process be prioritized through the building permit process as well as these projects that have been identified by the Board of County Commissioners as being critically important to the citizens of the County.

Table 36. Comparison Jurisdiction Building Permit Expedited Review Processes

County	Is a Priority or Expedited Review Process offered?	Program Name	Permit Type
Hartford County	Yes ¹	FAST TRACK	Building Permits
Baltimore County	Yes	Third-Party Developer's Plan Review ²	Restricted to Engineered Plans
Baltimore City	Yes	FAST TRACK	Commercial Tenant Building Permits - Minor Alternation ³
Adams County, PA	No	N/A	N/A

¹ The site page for additional information about the process is no longer available.

² Program is like the Anne Arundel County Certified Reviewer program. Applicants may hire a qualified third-party reviewer at their own cost in lieu of County staff to expedite the review process. The results of this review are verified by County staff on an expedited basis prior to final approval.

³ When permit application only requires Fire agency review and no other agencies.

Table 37. Comparison Jurisdiction Impact Fees

Type of Impact Fee	Development Type Levy	Carroll County		Harford County		Baltimore County		Baltimore City		Adams County, PA ¹	
		New Residential	New Non-Residential	New Residential	New Non-Residential	New Residential	New Non-Residential	New Residential	New Non-Residential	New Residential	New Non-Residential
School		✓		✓		✓	✓				
Transitional						✓	✓		✓	✓	✓
Parks		✓								✓	✓

¹ Impact fees in Pennsylvania differ significantly from those in Maryland due to state law. Pennsylvania's municipal enabling legislation only allows impact fees to be collected for funding transportation and recreation facilities. Additionally, impact fees are not collected on the County level. Rather, boroughs and townships are responsible for levying impact fees. Schools are funded through independent school districts rather than by the County itself.

Impact Fees

Impact fees can be imposed on new developments at the time of construction as a means to finance the cost of upgraded public facilities to meet demand from new growth. Counties in Maryland are authorized to levy impact fees in different ways based on their county structure. Maryland has two types of home-rule counties, (1) charter and code, and (2) non-charter commissioner, like Carroll County. Commissioner counties must be explicitly enabled to levy impact fees by the State – 5 out of the 11 commissioner counties have this ability. § 20-702 of the Maryland Local Government Article permits the Carroll County Commissioners to “impose development impact fees to finance any of the capital costs of additional or expanded public works, improvements, and facilities required to accommodate new construction or development.” The fees may not be used for addressing current needs or for operating expenses. Additionally, impact fees set by counties must pass what is called the “rational nexus test”, essentially stating that the fee rates/amount must be based on needs attributable to new development and reflect the cost of offsetting their impact.

Impact fees are an important tool in a county's toolbox for managing growth. As such, 15 out of 24 counties in Maryland use this method. Impact fees for Carroll County and its peer jurisdictions have been reviewed to establish a comparative baseline of the types of fees collected. See Table 37 for further information.

Impact Fee Revenues Review

The Maryland Department of Legislative Services collects and publishes data regarding impact fee and excise tax revenue for all counties in the State that have such policies. The data from a 2021 report provides fee rates and revenues from FY 19 – 21 for the 15 counties that have either impact fees or excise taxes.

Table 38 shows that revenues have declined overall statewide and revenues in Carroll County have decreased steeper than average. It also shows that total revenues lag Harford County significantly. Carroll County has an opportunity to assess other development sources of funding for transportation and other non-residential needs.

Table 38. Maryland County Development Impact Fee and Excise Tax Revenues

County				FY 19-20		FY 20-21	
	FY 19	FY 20	FY 21	Difference	% Difference	Difference	% Difference
Anne Arundel	\$32,733,712	\$19,050,000	\$21,775,600	-\$13,683,712	-41.8%	\$2,725,600	14.3%
Baltimore ¹	\$0	\$0	0	0	0.0%	0	0.0%
Calvert	\$2,866,973	\$3,101,213	3,214,150	234,240	8.2%	112,937	3.6%
Caroline	\$165,805	\$194,818	150,000	29,013	17.5%	-44,818	-23.0%
Carroll	\$255,993	\$175,862	158,276	-80,131	-31.3%	-17,586	-10.0%
Charles	\$10,991,958	\$10,482,700	10,818,900	-509,258	-4.6%	336,200	3.2%
Dorchester ²	\$0	\$0	0	0	0.0%	0	0.0%
Frederick	\$30,033,584	\$19,559,856	18,940,714	-10,473,728	-34.9%	-619,142	-3.2%
Harford	\$3,438,000	\$3,500,000	1,750,000	62,000	1.8%	-1,750,000	-50.0%
Howard	\$12,979,439	\$11,467,128	13,108,700	-1,512,311	-11.7%	1,641,572	14.3%
Montgomery	\$52,595,000	\$37,000,000	29,970,000	-15,595,000	-29.7%	-7,030,000	-19.0%
Prince George's	\$47,560,230	\$45,581,794	45,600,000	-1,978,436	-4.2%	18,206	0.0%
Queen Anne's	\$2,004,178	\$1,640,900	2,274,880	-363,278	-18.1%	633,980	38.6%

¹ Baltimore County imposes a development impact surcharge on new nonresidential construction and a development impact fee on new residential construction that has been initiated on or after July 1, 2020. Due to the timing of collections, substantial revenues are not expected in fiscal 2021.

² The county development excise tax is suspended. In June 2020, Dorchester County adopted an extension of the excise tax suspension through June 2022, Bill No. 2020-3.

Table and Data Source: Maryland Department of Legislative Services

Transportation Impact Fee Case Studies

Transportation impact fees are charges imposed by local governments on developers or property owners when new development projects are proposed or permitted. These fees are intended to help offset the costs associated with the increased demand for transportation infrastructure and services resulting from the new development. Typically, the fees are calculated based on factors such as the type of development, its size, and its expected impact on the transportation network. Below are a few Maryland entities that assess a transportation impact fee that could be a guide for Carroll County.

Montgomery County, MD

Montgomery County, through its adoption of the Capital Improvements Program, indicates its commitment to providing transportation infrastructure. The County recognizes that addressing the transportation challenges posed by growth in the County will require a multifaceted approach. Consequently, the County is proposing to finance a transportation improvement program using development impact taxes to facilitate and support new growth within its boundaries. The development review process is regarded as a component of the master plan staging. Both land development and transportation projects, as well as the goals and objectives outlined in local Master Plans and Sector Plans, have a long-term horizon of more than 25 years. In 2012, the County restructured its biennial "Growth Policy" as a quadrennial "Subdivision Staging Policy." Montgomery County uses a three-tiered approach to development exactions.

- 1. A transportation impact tax** covers the basic "access" costs to the transportation system.
- 2. A Local Area Transportation Review** process identifies transportation deficiencies based on conditions proximate to the development site.
- 3. A Transportation Policy Area Review** process identifies transportation deficiencies based on conditions throughout the Policy Area in which the site is located.

Baltimore, MD

The City of Baltimore Department of Transportation is responsible for overseeing the transportation impact analysis process. Baltimore employs two complementary approaches to address transportation impacts arising from development.

- 1. Inside a Traffic Mitigation Zone**, developers are required to make a fee payment.
- 2. Outside a Traffic Mitigation Zone**, developers must conduct a Traffic Impact Study.

According to Ordinance 06-0345, as later amended by Ordinance 11-529, development projects of a certain scale undergo a review by the Department of Transportation. This review determines whether a traffic impact study and/or mitigation measures are necessary. The primary objective of traffic mitigation is to ensure that specific development projects take steps to alleviate their impacts on the City's intermodal transportation network. These mitigation impacts are assessed in one of two ways: for projects situated within a Traffic Mitigation Zone, mitigation is achieved through a fee payment, while projects outside of this zone may necessitate a Traffic Impact Study to assess their impact.

Gaithersburg, MD

The City of Gaithersburg is in Montgomery County, but it holds autonomous planning and zoning authority separate from the unincorporated county areas. The City of Gaithersburg Planning Commission serves as the entity responsible for granting development approvals. As previously established, Maryland operates as a "home rule" state, granting significant local planning and zoning autonomy. The City of Gaithersburg's Planning and Code Administration Department is tasked with supervising the development procedures. All development or redevelopment projects are obligated to adhere to the City's Adequate Public Facilities Standards, which are outlined in Section 24-257 of the Zoning Ordinance.

The City of Gaithersburg uses a two-tiered approach to development exactions.

- 1. A transportation impact tax** covers the basic "access" costs to the transportation system; the tax is the same as Montgomery County's transportation impact tax .
- 2. A Traffic Impact Study (TIS)** process identifies transportation deficiencies based on conditions proximate to the development site.

Transportation Impact Fee Considerations

Transportation impact fees provide a dedicated source of revenue to fund transportation infrastructure improvements, such as road expansions, public transit enhancements, and intersection upgrades. Whether transportation impact fees would be a significant enough source of revenue to allow for proactive projects depends on various factors, including the scale of development, fee rates, and the specific transportation needs of the area. Impact fees alone may not always cover the full cost of transportation infrastructure improvements.

Local governments often use a combination of funding sources, including taxes, grants, bonds, and public-private partnerships, to fund transportation projects comprehensively. The sufficiency of revenue from impact fees will vary from one jurisdiction to another and should be carefully assessed as part of the planning process.

There several aspects for the County to consider when evaluating the value of implementing this type of impact fee.

Fairness - These fees allocate the financial responsibility for increased transportation demands caused by new developments to the developers or property owners who benefit from them, rather than burdening existing residents.

Proactive Planning - By collecting fees upfront, the county can plan and execute transportation projects more proactively, addressing potential traffic congestion and safety concerns in advance.

An Enhanced Quality of Life - Improved transportation infrastructure, including efficient public transit systems, well-maintained roads, and safe pedestrian and cycling options, contributes to a higher quality of life for residents. Reduced congestion and shorter commute times can lead to less stress and more time for leisure and family activities.

- **Economic Growth** and well-planned transportation systems can attract businesses and investors. Accessible locations with robust transportation options are often more appealing to companies, which can lead to job creation and economic growth in the area. Additionally, increased economic activity can result in higher property values.
- **Reduced Environmental Impact**, proactive transportation planning can include measures to reduce greenhouse gas emissions, air pollution, and traffic-related environmental degradation. Investments in public transit, electric vehicle infrastructure, and sustainable urban planning can contribute to a greener and more sustainable future.
- **Safety Improvement** and addressing transportation issues can lead to safer roads and transportation networks. Upgrades to road infrastructure, better signage, and improved traffic management can reduce the number of accidents and injuries, making communities safer for residents and visitors.
- **Community Connectivity**, effective transportation planning can enhance connectivity within communities. Safe pedestrian and cycling options, along with improved public transit, can reduce reliance on private vehicles and promote social interactions and a sense of community.
- **Reduced Commute Times**, well-planned transportation systems can significantly reduce commute times, allowing people to spend less time in traffic and more time with their families or pursuing other activities. This can improve work-life balance and overall well-being.
- **Attraction for Investment and Talent**, attractive transportation options make an area more appealing to both businesses and a talented workforce. Cities and regions with efficient transportation systems are more likely to attract skilled professionals and entrepreneurs.

- **Increased Property Values** and improved transportation infrastructure often lead to increased property values. Homes and commercial properties in areas with better transportation access tend to be more valuable and attractive to buyers and investors.
- **Sustainability and Resilience**, proactive transportation planning can incorporate sustainability and resilience principles, making communities better prepared to face challenges like climate change and natural disasters. Green transportation options, such as electric vehicles and low-emission public transit, can contribute to a more sustainable future.
- **Reduced Congestion**, addressing transportation issues can help reduce traffic congestion, which not only saves time for commuters but also reduces fuel consumption and air pollution associated with stop-and-go traffic.

Attractive Development - Well-planned transportation systems can make an area more attractive for development, benefiting both the community and developers. Improved infrastructure can enhance property values and encourage economic growth.

Costs Passed to Consumers - Developers may pass the cost of impact fees onto consumers in the form of higher home prices or rents, potentially making housing less affordable.

Complexity - Implementing and administering impact fee programs can be administratively complex and may require significant resources.

Impact on Development - Higher fees could discourage certain types of development, potentially slowing economic growth or reducing the availability of housing.

Equity Concerns - Critics argue that impact fees may not always accurately reflect the actual transportation impact of a development, potentially leading to inequities.

PUBLIC ENGAGEMENT

Through multiple engagement activities, Carroll County created a participatory environment where the voices of its residents and stakeholders were heard, valued, and incorporated into overall decision-making processes.



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Introduction

This section aims to provide a comprehensive overview of the public engagement initiatives conducted during this Study's planning process. It highlights the key outcomes and feedback received for future community-driven efforts and recommendations. Specific groups and demographics targeted during these outreach events included the business community, students, and industry and business leaders. Various public engagement initiatives were undertaken, including public open houses, stakeholder interviews, online surveys, project website, and outreach advertisements in both English and Spanish. These initiatives offered opportunities for individuals and groups to engage throughout the project process and express their thoughts and concerns around the present and future of the county.

Public Open Houses

February 16, 2023

In February, the Study team and members of the county staff kicked off the community engagement with a public open house event held at Exploration Commons, 50 East Main Street (Carroll County Public Library, Westminster Branch). The event was held to introduce members of the community to the Study and its objectives, and to begin the process of listening to citizens and collecting their thoughts and opinions. During this event, three break out stations were set up for participants to give their input with the goals of collecting feedback on Carroll County's economic, cultural, and natural assets; geographic focus areas; and perceived constraints and gaps to growth. One station consisted of voting boards listing different critical assets within the community that were utilized by participants to rate which assets were the most important to them.

The categories included:

- Associations: The groups within the community united by a common interest or goal: private, non-profit, political, and others
- Institutions: Provided by the government and are used to serve the needs and interests of the public
- Priority Redevelopment Areas: Assessed to identify which areas can be redeveloped or are currently underutilized
- Local economy includes local driven economic activity such as small businesses within the area.
- Physical spaces refer to spaces that residents can use to engage and have social interactions.

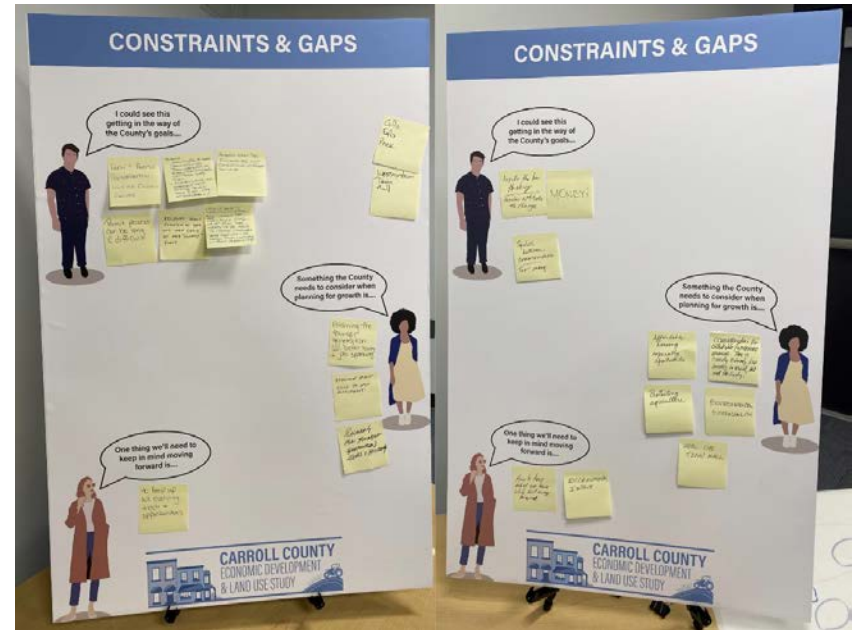


Countywide Asset Ranking Board Results
Image Source: WGI, Inc.



Participants Ranking Countywide Assets
Image Source: WGI, Inc.

Another station included an opportunity for participants to give their opinions on what they consider to be constraints and gaps by writing down their feedback and sticking them on a board to discuss with the project team and fellow attendees. The team also led an asset mapping exercise at which participants had the chance to identify the areas of the county they perceived to be the county's strongest areas today, and where the county's greatest opportunities are.



Example Countywide Constraints and Gaps Comment Board
Image Source: WGI, Inc.

In conjunction with the in-person event, an online survey presenting the same asset rating system was available for those who could not attend. These activities were used to identify the specific areas in the county suitable for development and factors limiting potential economic growth. In total, data was gathered from 90 virtual and in-person participants including residents, local business owners, and key stakeholders.

Results

Figure 31: February Public Open House Results

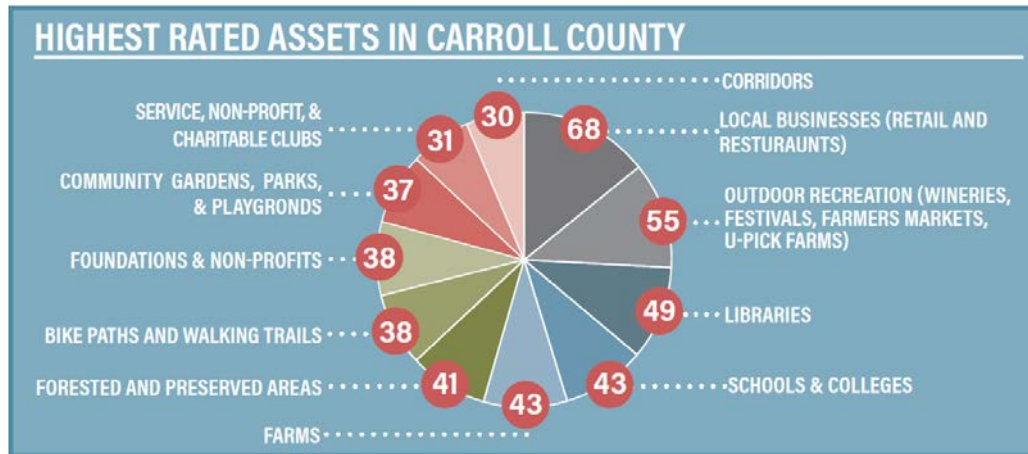


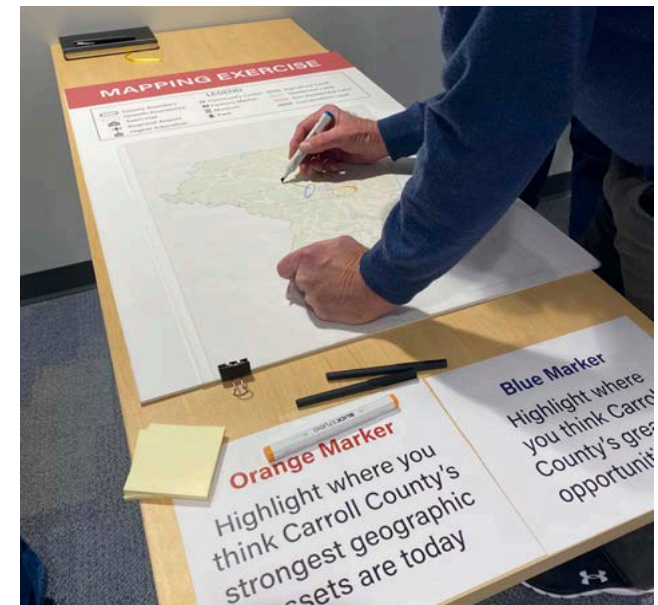
Figure Source: WGI, Inc.

Figure 31 summarizes the results collected during the in-person and online engagement exercises. The results showed a fairly even distribution of ranked assets in the county with local businesses, such as retail and restaurant establishments, rated highest at 68 votes, followed by outdoor recreation activities, such as wineries, festivals and farmers markets at 58 votes, and libraries at 49 votes. Lower ranked assets, such as corridors, non-profit or charitable clubs, community gardens, and parks and playgrounds, are 42% less favorable than those higher ranked assets in the county.

A second outcome of the open house was the creation of a countywide asset map which synthesizes resident perception, distilled from the open house feedback, with data sourced from Esri Community Analyst and Data Axle to visualize concentrations of amenities, cultural landmarks, and businesses. These factors influence residents', businesses', and visitors' perceptions of Carroll County and can inform geographic, place-based policymaking related to future investment and development of economic opportunity. It complements the map created by attendees which identifies the areas

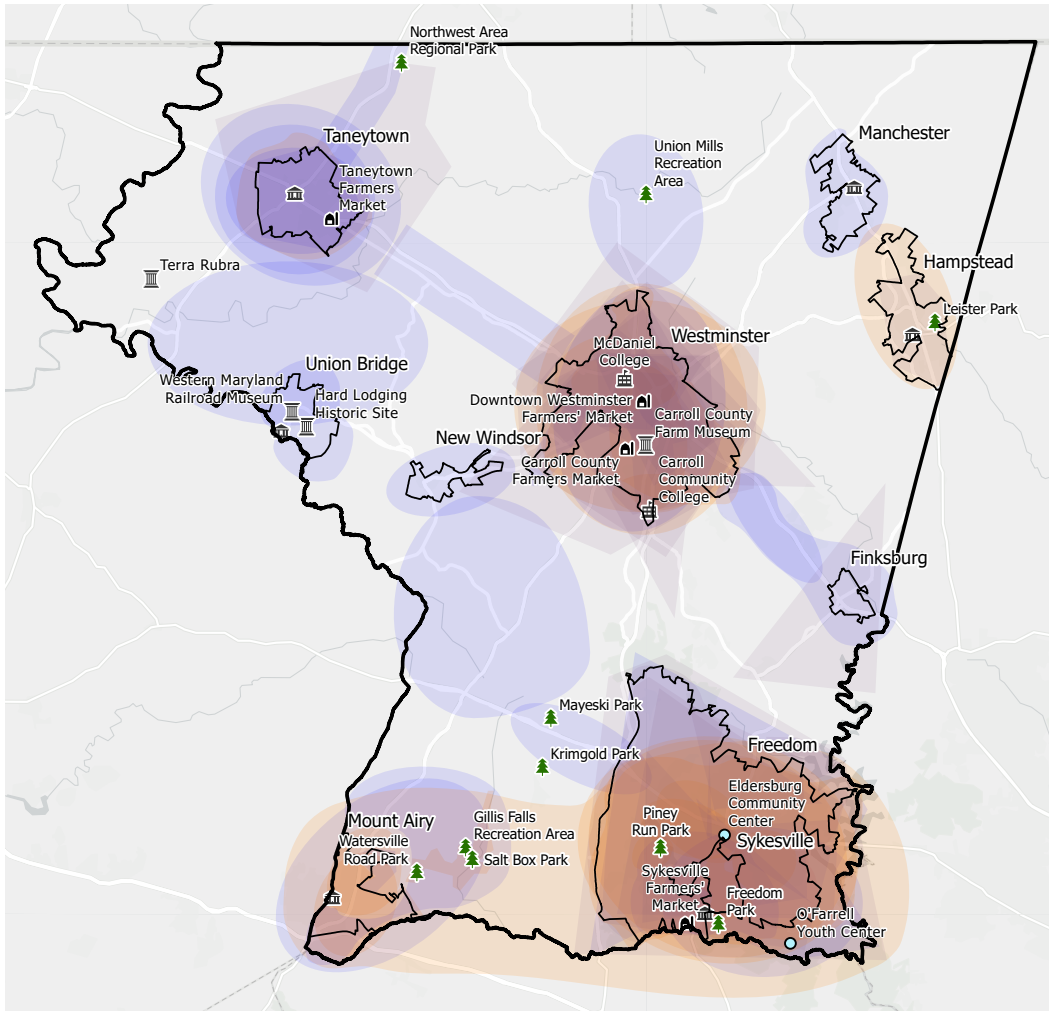
of the county they perceive as the strongest today and those areas which they believe have the most opportunity in the future.

The open house map, as shown on the next page in Figure 32 shows concentrations of perceived opportunities in Freedom, Mount Airy, Westminster, and to a lesser extent, Taneytown and Hampstead. The asset map shows existing concentrations of businesses in these areas, which together mark them as ideal locations to further develop clusters of economic development drivers.



Participants Mapping County Assets and Opportunities
Image Sources: WGI, Inc.

Figure 32: Countywide Asset Map



LEGEND

<ul style="list-style-type: none"> County Boundary MGAs/DGAs 	<p>FEATURES</p> <ul style="list-style-type: none"> City or Town Hall College Community Center Farmers Market Museum Parks and Recreation Areas 	<p>SURVEY RESPONSES</p> <ul style="list-style-type: none"> WORKSHOP: Where are the County's strongest assets today? WORKSHOP: Where are the County's biggest opportunities? ONLINE: Where is the County's greatest asset?
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Figure Source: WGI, Inc.

April 27, 2023

The second open house event took place on April 27, 2023. Like the first meeting, this open house was led by WGI and county staff and presented break out stations for participants to provide feedback. The theme of this open house was economic development sectors and centered around educating attendees about potential economic development drivers for the county and gauging the public interest in attracting or further developing the respective sectors. The evening began with a presentation that provided feedback from the first open house, updates to the Study timeline, and introduced the evening’s activity.

After the presentation, participants began the activity. Eleven boards that each focused on a sector chosen by the study team were created and displayed.

Figure 33 shows the small business incubation board, which was the typical layout for all of the boards. Participants had the chance to learn about each sector and were distributed a bank of play money to “invest” in their desired industries. Team members and County staff were available to answer questions about the sectors and gather feedback from dialogues with participants.

Figure 33: Small Business Incubation Board

TITLE DEED

SMALL BUSINESS INCUBATION

Focusing on development of local enterprises, either sole proprietorships or with small numbers of employees, across industries

SUMMARY
 Carroll County could look inward, drawing on its network of educated residents with experience getting the job done to cultivate homegrown companies. The County could work with entrepreneurs living in the county and businesses that would be a good fit for the county to set up shop and grow in its cities and towns.

WHAT COULD THE FUTURE OF SMALL BUSINESS INCUBATION LOOK LIKE IN CARROLL COUNTY?

- More focus placed on the local chambers of commerce, Economic Development departments, and other local institutions
- Proactively reducing barriers to entry for businesses looking to start in Carroll County
- Providing opportunities for residents to start small businesses and expand while staying in Carroll County
- May look like office space rather than industrial buildings

	LOW - HIGH		
LAND COVER	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CONCENTRATION OF NEW JOBS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ECONOMIC IMPACT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

OPPORTUNITIES

- Elected official support of cottage industries and small business
- Support from the Carroll County Business Services Partnership
- Support from Carroll County Small Business Administration lending institutions
- Focus on business growth and development

CONSIDERATIONS

- Operational sustainability may be challenging
- Often contingent on funding for start-ups
- Incubators may rather locate in surrounding counties



Local Small-Business



Local Small-Business

Figure Source: WGI, Inc.

Results

Figure 34: Total Number of Votes by Industry

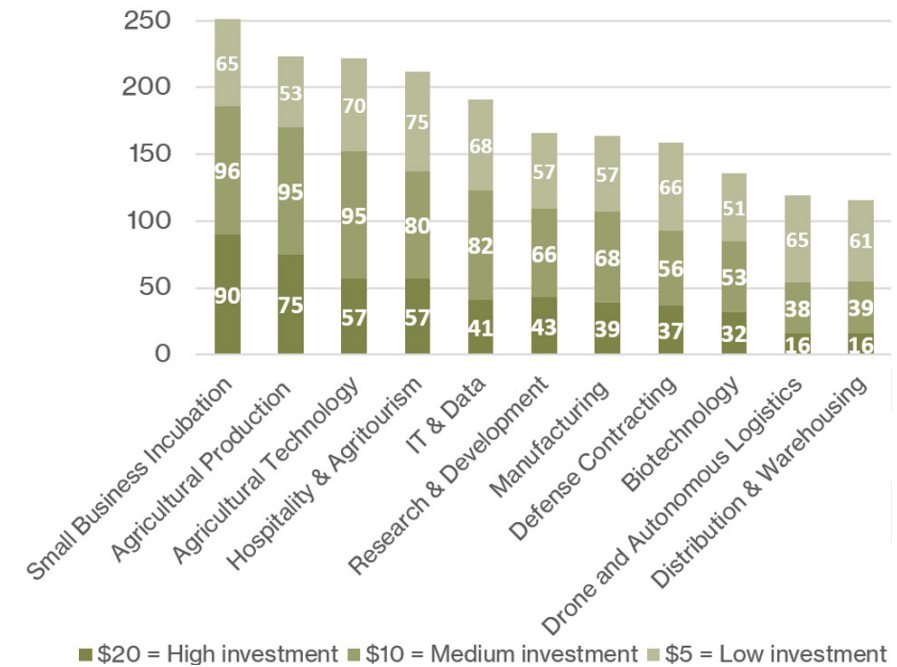


Figure Source: WGI, July 2023

Figure 34 displays the total number of votes by range of investment and is further categorized by industry. A medium investment option of \$10 dollars per industry was the most common choice at 33% of respondents. Another 30% chose a low investment option of \$5, and only 22% of voters elected for the highest possible investment of \$20. The engagement exercise also included an option for no investment where the remaining 15% of responses landed.

Figure 35: Total Dollar Amount of Industry “Investment”

Small Business Incubation	\$	3,085
Agricultural Production	\$	2,715
Agricultural Technology	\$	2,440
Hospitality & Agritourism	\$	2,315
IT & Data	\$	1,980
Research & Development	\$	1,805
Manufacturing	\$	1,745
Defense Contracting	\$	1,630
Biotechnology	\$	1,425
Drone and Autonomous Logistics	\$	1,025
Distribution & Warehousing	\$	1,015

Figure Source: WGI, July 2023

Figure 35, the highest ranked industries were small business incubation at a total of \$3,085, agricultural production at \$2,715 and close by at \$2,440 was agricultural technology. Industries such as distribution & warehousing, drone and autonomous logistics and biotechnology, ranked the lowest out of all the industries shown during the exercise. Out of the \$21,180 total amount of investment, 26% chose IT & data, research & development and lastly, manufacturing.

Stakeholder Interviews

At the beginning of the Study period, the project team met to determine the list of key stakeholders. The Department of Planning prepared a matrix of potential stakeholders across the groups County Leaders and Elected Officials, Municipal Leaders, and Other. This was narrowed to a final list of interviewees based on availability.

- County Leaders and Elected Officials
 - Tom Gordon, Carroll County Commissioner
 - Ed Rothstein, Carroll County Commissioner
 - Jack Lyburn, Director, Department of Economic Development
 - Chris Heyn, Director, Department of Land and Resource Management
 - Ted Zaleski, Director, Department of Management and Budget
 - Heidi Pepin, Chief, Bureau of Budget
- Municipal Leaders
 - Stacy Link, Mayor, Sykesville
 - Christopher Nevin, Mayor, Hampstead
 - Sara Imhulse, City Administrator, Westminster
 - Joe Cosentini, Town Manager, Sykesville
 - Larry Hushour, Mayor, Mount Airy

- Other County Stakeholders
 - Darren Peyton, Assistant Regional Director, Maryland Small Business Development Center
 - Sue Chambers, Chair, Industrial Development Authority of Carroll County
 - Mike McMullin, CEO, Carroll County Chamber of Commerce
 - Matthew Hoff, Owner, Cold Springs Farm; Planning and Zoning Commissioner
 - Steven McCleaf, Principal, Langley Realty Partners
 - Eric Simon, VP for Administration and Finance, McDaniel College

While each interview was tailored to the stakeholders' specific knowledge and expertise, the Study team used a standardized list of questions to get the ball rolling. These questions were a jumping-off point for the interviews but were not extensive. Interviews were conducted with the understanding that interviewees would not be quoted and that answers would be kept confidential and only used to inform the Study in general. Therefore, specific questions and answers beyond the standard list cannot be made public.

1. What would you consider to be a useful analysis as part of this Land Use and Economic Development Study?
2. Can you recommend any zoning and land use regulations to improve Carroll County's competitive market position?
3. What are the obstacles (if any) in the way of economic growth in Carroll County?

4. What are the most obvious opportunities for economic growth in Carroll County? What are the least obvious and why?
5. Have there been any specific developments, projects or industries that are signaling opportunity (i.e., biotech)?
6. What can Carroll County do to better support your organization/ industry? This could include new economic development policies, funding sources, and strengthening regional and state strategic partnerships.

Focus Groups

The Study team convened three focus groups with the purpose of gathering feedback through open conversation and dialogue between identified stakeholders whose experience and positions complement each other's. All three focus groups were conducted in person at the Carroll County Office Building.

Focus Group 1: Key Industry Sectors and Carroll Technology and Innovation Council February 16, 2023

Participants:

- Christopher Abell – Executive Director, Carroll Technology and Innovation Council
- Darren Peyton – Assistant Regional Director, Maryland Small Business Development Center
- Larry Hajnos – Facilities Manager, Northrop Grumman, Sykesville Plant
- Amy Yingling – Regional Director, Maryland Small Business Development Center

Focus Group 2: Property and Land Owners March 13, 2023

Participants:

- Bruce D’Anthony – Commercial Team Leader, The D’Anthony Group
- Graham Dodge – Executive Director, Mid-Atlantic Gigabit Innovation Collaboratory
- Dixon Harvey – Owner/Partner, Black Oak Associates

Focus Group 3: Business Owners and Investors April 27, 2023

Participants:

- Andrew Boone – VP, Sales and Business Development, Maryland Print House
- Brian Ditto – Director of Real Estate Leasing and Development, NI Business Park Leasing
- Josh Kohn – Owner, KōHN Creative
- Joshua Rosen – President/CEO, NI Business Park Leasing

Online Surveys

In addition to the open house companion surveys, the study team developed two tailored surveys to gather more in-depth information from target groups; the business community and students. They were both deployed online and were distributed directly to recipients using email lists from the Department of Economic Development and Carroll Community College respectively. The surveys included questions asking respondents’ experiences living, working, and studying in the county and how the county’s culture and business environment influence their decision-making.

Business Climate Survey

In addition, stakeholders and business owners who participated in focus groups during the Study process were asked to participate in a business climate survey to further examine the culture, goals and context of the business community and how the County can continue to cultivate a profitable environment for its businesses.

Results

Figure 36: Investments that would Improve Business in Carroll County

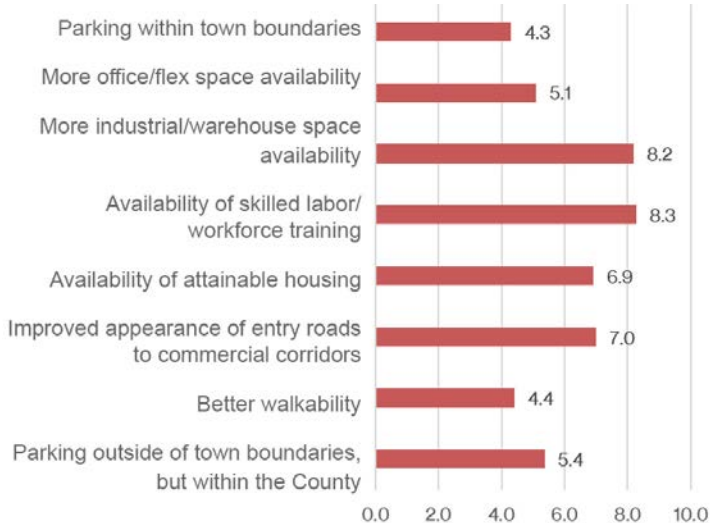


Image Source: WGI, Inc.

Figure 36 is a breakdown of potential investment options business owners could make to improve the health of their companies in Carroll County. Responses showed interest in the availability of skilled labor/workforce training, and a larger supply of available industrial/warehouse space.

Other notable mentions include the improved appearance of entry roads to commercial corridors and availability of attainable housing. Of the options given, business owners felt that parking within town boundaries and having a walkable urban environment did not impact the growth and development of their business in the County.

The Department of Economic Development distributed the business climate survey to their email lists and received 12 responses from a broad range of perspectives.

As shown in Figure 37, business owners were asked to rate the largest threats or challenges to their business in the next upcoming 12 months. The results show concern for the rising cost of goods/inflation, County or State regulations, and the available workforce. Only 6% of business owners expressed COVID-19 as a potential challenge to their business in the next 12 months.

Figure 37: Highest Rated Business Challenges in the Next 12 Months

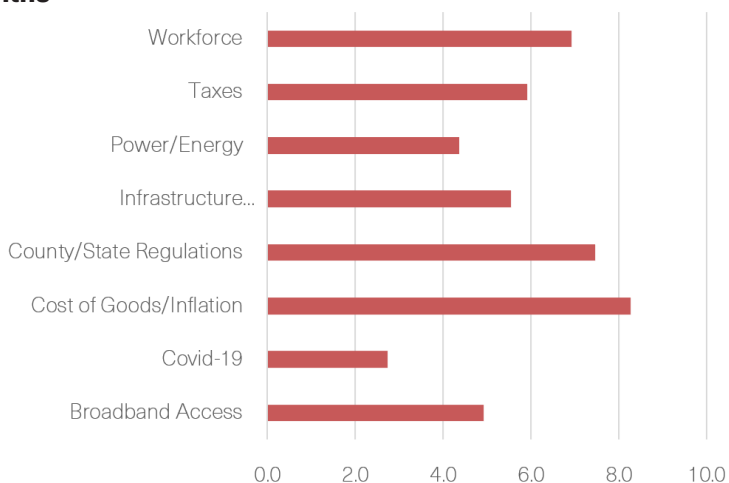


Figure Source: WGI, Inc.

Student Survey

The project team developed a survey to target students from McDaniel College and Carroll Community College in response to feedback from the County and stakeholders to learn more about young peoples' past experiences and future plans in Carroll County. The survey was distributed to Carroll Community College students via school's email newsletter and received 10 responses.

Results

Figure 38: Ability to Find Internships or Work Experience Relative to a Course of Study

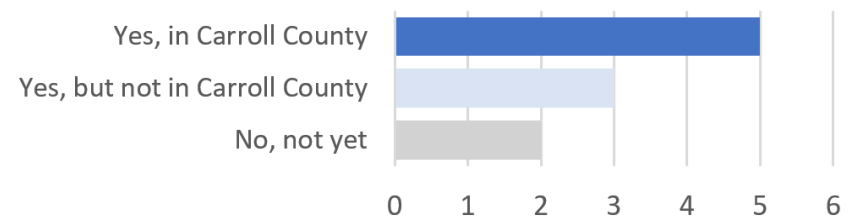


Figure Source: WGI, Inc.

In Figure 38, students were asked if internships or work experience relative to their course of study could be found in the county. Out of the 10 responses, half were able to find relatable work experience in the county. Three students found related jobs or internship outside of the county. Of the students able to locate related work experience in the county, their course of study is one of the following:

- Business Administration
- Early Childhood Education
- Continuing Education
- Nursing
- Communications

Figure 39: Current Living Arrangement

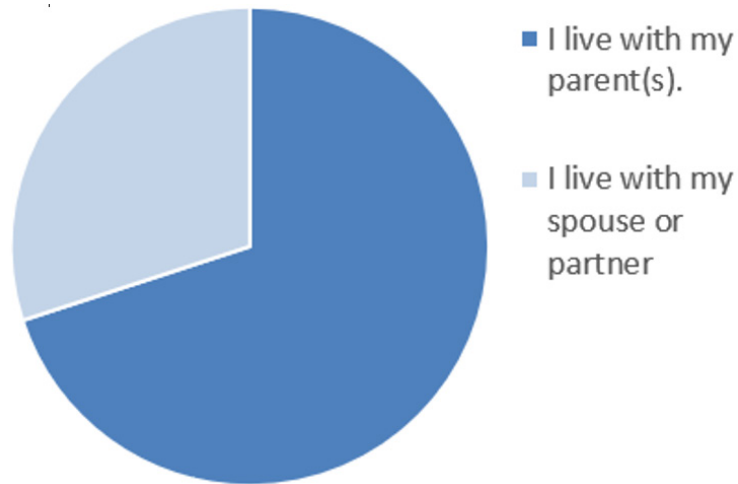


Figure Source: WGI, Inc.

In Figure 39, students were asked what the status of their current living arrangement is. 70% of students reside at home with their parent(s) with the remaining 30% living with a spouse or partner.

Stakeholder Interviews

At the beginning of the Study period, the project team met to determine the list of key stakeholders. The Department of Planning prepared a matrix of potential stakeholders across the groups County Leaders and Elected Officials, Municipal Leaders, and Other. This was narrowed to a final list of interviewees based on availability,

- County Leaders and Elected Officials

Board of County Commissioners Presentations

The Study team made multiple presentations to the Board of County Commissioners over the course of the Study period to introduce the project, provide progress updates, and gather valuable feedback from the commissioners.

- January 26, 2023
- April 27, 2023

Planning and Zoning Commission Presentations

The Study team also met with the Planning and Zoning Commission to discuss the Study and dialogue with the commissioners about their perspective on the county's opportunities and concerns in the future.

- March 1, 2023
- June 7, 2023
- November 14, 2023
- November 29, 2023

APPENDIX A

Zoning district purpose statements, sourced from the zoning district ordinance

Abbreviation	District	Purpose
A	Agricultural District	The purpose of the A District is to provide for continued farming activities, conserve agricultural land, and reaffirm agricultural use, activities, and operations as the preferred dominant use of the land within the district.
C	Conservation District	The purpose of the C District is to prescribe a zoning category for those areas where, because of natural geographic factors and existing land uses, it is considered feasible and desirable to conserve open spaces, water supply sources, woodland areas, wildlife, and other natural resources. This district may include extensive steeply sloped areas, stream valleys, water supply sources, and wooded areas adjacent thereto.
C-1	Commercial Low Intensity District	The purpose of the C-1 District is to provide locations for small-scale, low intensity retail and service commercial uses which are intended to provide goods and services primarily serving the residents of the surrounding neighborhoods with a minimum of consumer travel and convenient auto access. Uses allowed in the C-1 District include but are not limited to retail sales and services, personal services, medical facilities, eating establishments, recreation and entertainment, and small professional office uses.
C-2	Commercial Medium Intensity District	The purpose of the C-2 District is to provide locations for a diverse range of medium-intensity retail, service and professional office uses needed by a larger population than those provided for in the C-1 District. This district is also intended to provide locations for compatible institutional and recreational uses, limited residential uses, and some of the general neighborhood uses associated with the C-1 District. Bicycle and pedestrian access are encouraged where possible to ensure compatibility with nearby neighborhoods.
C-3	Commercial High Intensity District	The purpose of the C-3 District is to provide locations for high-intensity, large-scale retail businesses and destinations of a regional nature, planned business parks, clusters of commercial development, wholesale businesses, offices, and certain light processing operations. This district is also intended to provide locations for compatible institutional and recreational uses and some of the medium-intensity uses associated with the C-2 District. Uses in this district should be located in proximity to transportation infrastructure and major corridors. Developments in the C-3 District should, where possible and appropriate, facilitate pedestrian circulation.

APPENDIX A

Zoning district purpose statements, sourced from the zoning district ordinance

Abbreviation	District	Purpose
EC	Employment Campus District	The purpose of the EC District is to provide for and foster comprehensively planned employment centers in campus-like settings to attract employers of highly skilled workers and primarily higher paying jobs, including but not limited to research and development, institutional, office, flex space, and other light and limited industrial uses, while also providing a more flexible approach to design and development. In this district, the integration of trails, sidewalks, communal plazas, and share amenities is encouraged.
H	Heritage District	The Heritage District permits agriculture; religious establishments; single- and two-family dwellings; buildings and properties of a cultural, civic, educational, social or community service type; and conversion of buildings existing prior to August 17, 1965, to accommodate two families by right. Additional small-scale commercial uses are permitted conditionally.
I-1	Light Industrial District	The purpose of the I-1 District is to provide locations for certain types of nonagricultural, nonresidential, and generally nonretail commercial activities characterized by light manufacturing, assembling, fabricating, warehousing, wholesale distribution, and limited office and commercial uses which are supportive or directly related to industrial uses, which may not be as intense as those provided for in the I-2 District and which, with proper landscaping, separation, setback, and buffering, will not significantly detract from adjoining residential or commercial properties.
I-2	Heavy Industrial District	The purpose of the I-2 District is to provide locations for certain types of nonagricultural, nonresidential, and noncommercial activities characterized by heavy manufacturing, refining, processing, or compounding of materials or products predominantly from raw materials. This district may also accommodate some of the light manufacturing uses permitted in the I-1 (Light Industrial) District
MHP	Mobile Home Park District	The purpose of the MHP District is to prescribe a zoning category wherein mobile home parks meeting minimum development standards established by the County may be authorized in limited locations deemed appropriate and compatible within the existing neighborhood.

APPENDIX A

Zoning district purpose statements, sourced from the zoning district ordinance

Abbreviation	District	Purpose
MRO	Mineral Resource Overlay District	Within the County, there is hereby established an area designated an MRO. This MRO includes areas identified as containing a MR, a VRA, and those areas surrounding the resource, identified as MRN. This overlay shall exist only in the A District, I-2 or I-1 on the Zoning Maps as adopted or amended. There shall be no new Agricultural Land Preservation Districts created pursuant to the Maryland Agricultural Land Preservation Program on any portion of a parcel assigned an MR or a VRA designation.
R-7,500	Residence, Multi-Family District	The purpose of the R-7,500 Residence District is primarily to provide a location within the designated growth areas for smaller lot sizes, a minimum of 7,500 square feet, and a greater number of dwellings per acre than the other residential districts. It is intended for single-family and two-family dwellings, and multi-family dwellings when included in a planned unit development. The area should be served with public water and public sewerage facilities. The district would coincide with areas designated for high-density residential development in the Master Plan.
R-10,000	Residence, Urban District	The purpose of the R-10,000 District is primarily to provide a location within the designated growth areas for smaller lot sizes, generally a minimum of 10,000 square feet for single and two-family dwellings, and multi-family dwellings when included in a planned unit development. The area should be served with public water and public sewerage facilities. The district would generally coincide with areas designated for high-density residential development in the Master Plan.
R-20,000	Residence, Suburban District	The purpose of the R-20,000 District is primarily to provide a location for single-family residential development, the individual lots of which generally contain a minimum of 20,000 square feet. The area should be served with public water and/or public sewerage facilities. The district would generally coincide with areas designated for medium-density residential development on the Master Plan.
R-40,000	Residence District	The purpose of the R-40,000 Residence District is primarily to provide a location for single-family residential development, the individual lots of which generally contain a minimum of 40,000 square feet. This district is generally not intended to be served with public water or sewerage facilities although in special situations, it may be.

APPENDIX B

I-1 District and Employment Campus District Permitted Uses Comparative Analysis

Land Use Category Description	I-1	EC
Agricultural		
Agriculture	P	P
Agricultural research laboratories and facilities	C	P
Feed or grain sales, may include storage	P	X
Flour or grain milling, drying, storage	P	X
Shop for the service, repair, or sale of farm equipment	P	X
Communications		
Communications tower	P	C
Communications tower complex	P	C
Radio or television studio	C	C
Commercial		
Vehicle sales/service		
Automobile service center	C	X
Vehicle repair shop	P	X
Vehicle sales lot (under 10,000 lbs. gross vehicle weight) ¹	C	X
Vehicle sales lot (10,000 lbs. or more gross vehicle weight) ²	C	X
1. A variance may not be granted to the weight or acreage requirements for this use. 2. A variance may not be granted to the weight or acreage requirements for this use.		
Catering establishment	X	P
Banquet/event facility	X	P
Restaurant	X	P
Tavern/bar	X	P
Lodging		

APPENDIX B

I-1 District and Employment Campus District Permitted Uses Comparative Analysis

Hotel or motel	X	P
Hotel or motel, as part of an Industrial Park or a Business/Industrial Park	P	NA
Office/Health Care		
Contractor's Office	P	P
Facility for dispensing of medical cannabis, in conjunction with a medical cannabis growing and/or processing facility	P	X
Medical or dental center	X	P
Professional or business office	P	P
Recreational/Entertainment		
Conference center	X	P
Conference center as part of an Industrial Park or a Business/Industrial Park	P	NA
Golf course	X	P
Indoor recreational facility	P	P
Indoor trap, skeet, rifle, or archery ranges, including gun clubs	P	X
Outdoor recreational area	C	P
Land Use Category Description	I-1	EC
Retail/Service		
Building or landscaping supplies sales and storage yard	P	X
General retail or general service, less than 10,000 square feet	X	P
General retail or general service, between 10,000 and 60,000 square feet	X	C
Rental of vehicles and goods with primarily outdoor equipment storage	P	X
Residential		
Household Living		
Single-family or two-family dwelling in a Rural Village	P	NA
Multi-family dwelling	X	P

APPENDIX B

I-1 District and Employment Campus District Permitted Uses Comparative Analysis

Retirement home	X	P
Retirement village	X	P
Single-family dwelling constructed after November 1, 2019	X	P
Townhouse	X	P
Townhouse in a retirement village	NA	P
Two-family dwelling	X	P
Two-family dwelling in a retirement village	NA	P
Institutional/Community Service		
Art, business, dance, music or similar school	X	P
Day care center	X	P
Nursery school	X	P
Museum	X	P
Private school	X	P
Trade school or professional training center	P	P
Industrial		
Manufacturing/Production		
Artisan manufacturing	P	P
Bituminous concrete mixing plant	C	X
Manufacturing/Production		
Brewery	P	X
Concrete and ceramic products manufacturing	C	X
Concrete or asphalt recycling	C	X
Distillery	P	X

APPENDIX B

I-1 District and Employment Campus District Permitted Uses Comparative Analysis

Food processing and packing plant	P	X
Indoor processing of medical cannabis	P	X
Light manufacturing	P	C
Limited distillery	P	P
Micro-brewery	P	P
Sawmill, commercial	C	X
Manufacturing/Production		
Winery	P	X
Land Use Category Description	I-1	EC
Trades		
Bottling (may include distribution) of soft drinks, alcoholic beverages, or milk	P	X
Printing shop	P	P
Welding, sheet metal, machine, carpentry, or similar shop	P	X
Transportation/Utilities		
Airport	C	X
Coal yard	X	X
Heliport	C	X
Solar energy conversion facility, ground-mounted	P	X
Towing service	P	X
Truck or motor freight terminal	C	X
Utility equipment building, yard, above-ground station or substation, or telephone exchange	C	C
Utility equipment, all others	P	P
Warehouse/Storage/Distribution		
Above ground petroleum products storage (2,000 gallons or greater)	C	X

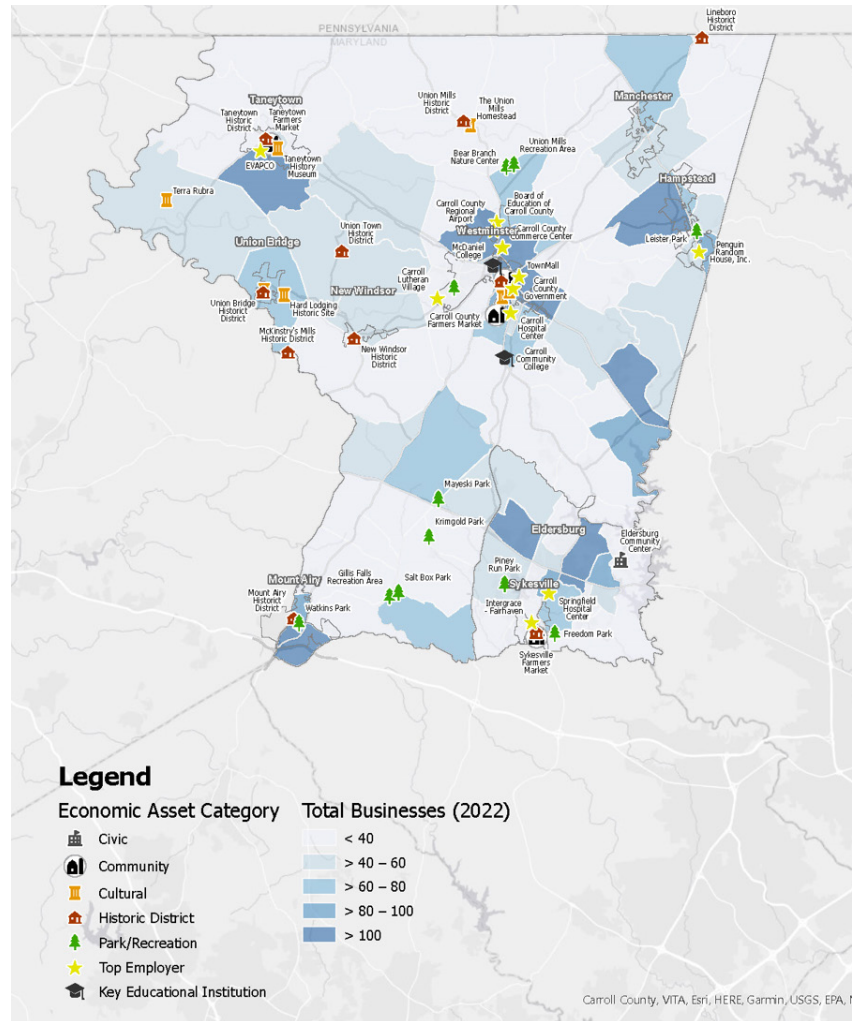
APPENDIX B

I-1 District and Employment Campus District Permitted Uses Comparative Analysis

Contractor's equipment storage facility	P	X
Self-service storage facility	X	X
Self-service storage facility in a sustainable community	C	X
Storage of pelletized or granular dried sewage sludge	P	X
Underground petroleum products storage	P	X
Warehouse or distribution facility	P	X
Waste-Related		
Oil-contaminated soil facility	C	X
Solid waste acceptance facility, as defined in Chapter 50 of the Carroll County Code	C	X
Miscellaneous		
Business/Industrial Park	P	X
Carpet and rug cleaning plant, industrial laundry or dry cleaning	P	X
Conveyor system	P	X
Extractive operation, with a MRO designation	P	X
Indoor growing of medical cannabis	P	X
Industrial Park	P	X
Laboratory (chemical, physical, or biological), not including agricultural	P	P
Use-off-the premises signs	P	X
Public		
Public facility	P	P

APPENDIX C

Countywide Economic Development Asset Map



APPENDIX D

Table A1. Carroll County Employment Projections by Industry Sector

Industry	Employment			Ann Grow
	2018	2028	Change	
Total All Industries	66,078	69,679	3,601	0.
Self-Employed Workers, All Jobs	3,895	4,090	195	0
Total Wage and Salary Employment	62,183	65,589	3,406	0.
Agriculture, forestry, and fishing and hunting	420	437	17	0.
111 Crop Production	204	213	9	0
112 Animal Production	136	135	-1	-0
115 Support Activities for Agriculture and Forestry	80	89	9	1
Mining, quarrying, and oil and gas extraction	57	64	7	1.
Construction	5,795	6,424	629	1.
236 Construction of Buildings	889	984	95	1
237 Heavy and Civil Engineering Construction	469	535	66	1
238 Specialty Trade Contractors	4,437	4,905	468	1
Manufacturing	3,778	3,503	-275	-0.
311 Food Manufacturing	308	309	1	0
315 Apparel Manufacturing	413	280	-133	-3
321 Wood Product Manufacturing	478	456	-22	-0
322 Paper Manufacturing	70	62	-8	-1
325 Chemical Manufacturing	88	85	-3	-0
327 Nonmetallic Mineral Product Manufacturing	240	224	-16	-0
332 Fabricated Metal Product Manufacturing	424	413	-11	-0
333 Machinery Manufacturing	935	883	-52	-0
334 Computer and Electronic Product Manufacturing	116	103	-13	-1
336 Transportation Equipment Manufacturing	453	450	-3	-0
339 Miscellaneous Manufacturing	118	117	-1	-0
Wholesale trade	2,762	2,706	-56	-0.
423 Merchant Wholesalers, Durable Goods	834	813	-21	-0
424 Merchant Wholesalers, Nondurable Goods	1,854	1,815	-39	-0
425 Wholesale Electronic Markets and Agents and Brokers	74	78	4	0
Retail trade	8,505	8,495	-10	0.
441 Motor Vehicle and Parts Dealers	1,061	1,079	18	0
442 Furniture and Home Furnishings Stores	482	500	18	0
443 Electronics and Appliance Stores	79	70	-9	-1
444 Building Material and Garden Equipment and Supplies Dealers	668	690	22	0
445 Food and Beverage Stores	2,051	2,031	-20	-0
446 Health and Personal Care Stores	472	482	10	0
447 Gasoline Stations	420	433	13	0
448 Clothing and Clothing Accessories Stores	325	272	-53	-1
451 Sporting Goods, Hobby, Book, and Music Stores	273	249	-24	-0
452 General Merchandise Stores	2,032	1,986	-46	-0
453 Miscellaneous Store Retailers	373	359	-14	-0
454 Nonstore Retailers	269	344	75	2

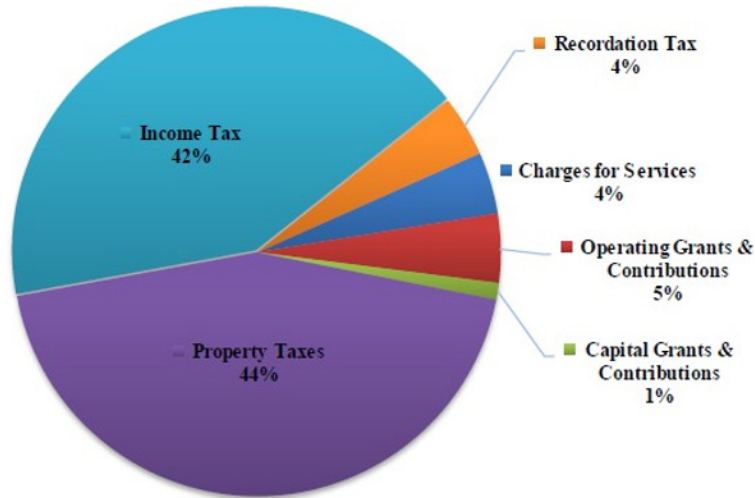
	Transportation and warehousing	1,405	1,480	75	0.5%
484	Truck Transportation	351	364	13	0.4%
485	Transit and Ground Passenger Transportation	412	431	19	0.5%
488	Support Activities for Transportation	111	117	6	0.5%
491	Postal Service	276	284	8	0.3%
493	Warehousing and Storage	178	204	26	1.4%
	Information	261	243	-18	-0.7%
511	Publishing Industries (except Internet)	55	55	0	0.0%
517	Telecommunications	125	100	-25	-2.2%
	Finance and insurance	1,067	1,094	27	0.3%
522	Credit Intermediation and Related Activities	588	592	4	0.1%
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	154	160	6	0.4%
524	Insurance Carriers and Related Activities	308	321	13	0.4%
	Real estate and rental and leasing	578	606	28	0.5%
531	Real Estate	395	419	24	0.6%
532	Rental and Leasing Services	183	187	4	0.2%
	Professional, Scientific, and Technical Services	8,184	9,138	954	1.1%
	Management of Companies and Enterprises	125	131	6	0.5%
561	Administrative and Support Services	2,448	2,567	119	0.5%
562	Waste Management and Remediation Service	521	563	42	0.8%
	Educational services	6,064	6,240	176	0.3%
611	Local Education Employment	4,849	4,990	141	0.3%
611	Private Education Employment	1,215	1,250	35	0.3%
	Health care and social assistance	6,400	7,153	753	1.1%
622	Hospitals	2,037	2,151	114	0.5%
623	Nursing and Residential Care Facilities	2,630	2,893	263	1.0%
624	Social Assistance	1,733	2,109	376	2.0%
	Arts, entertainment, and recreation	959	1,023	64	0.6%
713	Amusement, Gambling, and Recreation Industries	917	979	62	0.7%
	Accommodation and food services	6,182	6,860	678	1.0%
721	Accommodation, including Hotels and Motels	376	378	2	0.1%
722	Food Services and Drinking Places	5,806	6,482	676	1.1%
	Other services, except public administration	3,637	3,738	101	0.3%
811	Repair and Maintenance	877	902	25	0.3%
812	Personal and Laundry Services	955	1,017	62	0.6%
813	Religious, Grantmaking, Civic, & Professional	1,745	1,765	20	0.1%
814	Private Households	60	54	-6	-1.0%
	Government	3,030	3,119	89	0.3%
9991	Federal Government, Excluding Post Office	61	63	2	0.3%
9992	State Government, Excluding Education and Hospitals	1,266	1,303	37	0.3%
9993	Local Government, Excluding Education and Hospitals	1,703	1,753	50	0.3%

APPENDIX E

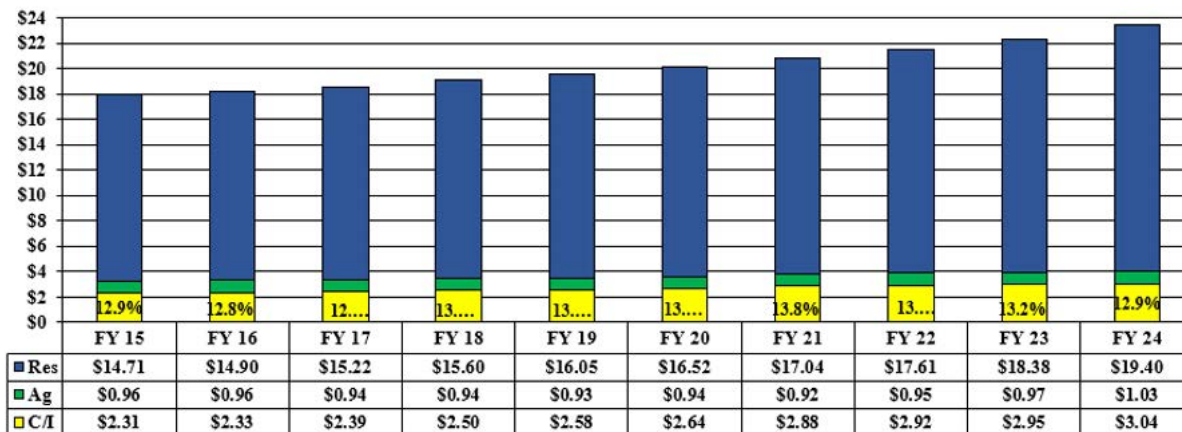
Property-Specific County Revenue Generation

Most fiscal revenues in Carroll County come from income tax (42%) or property tax (44%). A majority of property tax revenues come from residential properties while most income tax revenues are generated by commercial properties including office, industrial, flex, retail, and agricultural land uses.

Revenues by Source

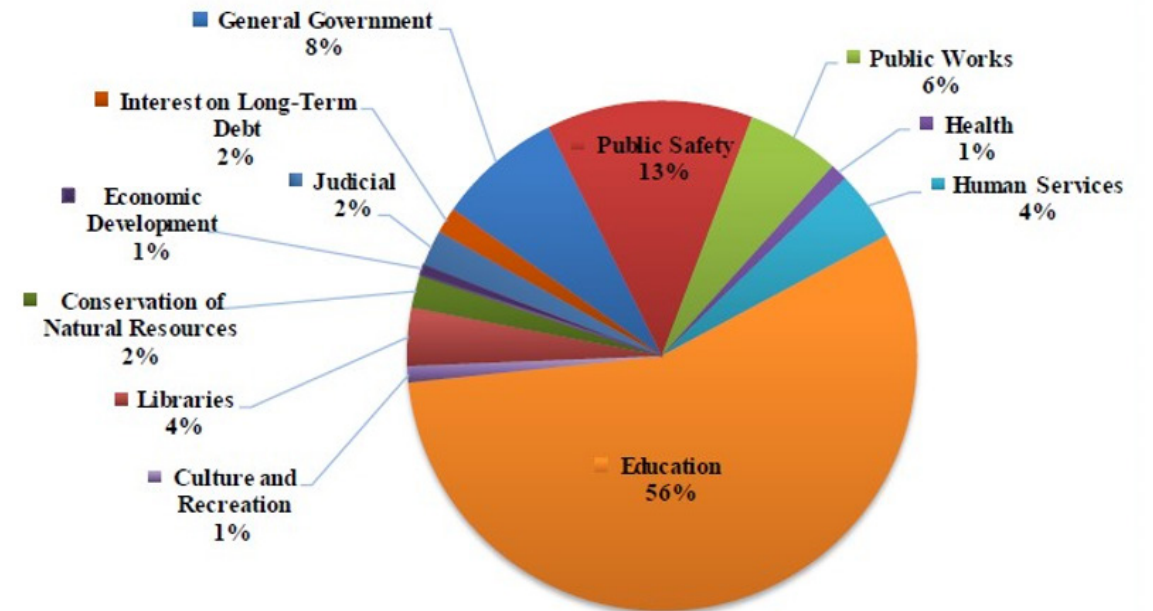


Residential, Commercial/Industrial and Agricultural Base (Billions)



In all, commercial uses generate slightly more income than residential uses while residential uses garner a far larger share of County expenses than commercial uses. Correspondingly, most commercial uses generate a net fiscal surplus to the County general fund.

Expenses - Services



APPENDIX E

Property-Specific County Revenue Generation

	Industry Type	Parcel Size (Acres)	Tot. Assessed Value*	No. of Onsite Employees	Est. County Property Tax	Est. County Personal Income Tax	Est. County Corporate Income Tax	Total Annual Estimated Tax Revenue
1	Vineyard	17.8	\$906,000	15	\$9,223	\$18,300	\$4,749	\$32,272
2	Vineyard	5.1	\$522,800	10	\$5,322	\$12,200	\$845	\$18,367
3	Manufacturing / Office	38.1	\$7,356,000	175	\$74,884	\$341,600	\$228,750	\$645,234
4	Manufacturing / Office	12.3	\$9,969,300	60	\$101,487	\$131,760	\$33,956	\$267,203
5	Technology / Defense	35.1	\$5,970,100	500	\$60,776	\$1,525,000	\$77,070	\$1,662,846
6	Distribution	18.5	\$5,285,800	1,000	\$53,809	\$1,586,000	\$762,500	\$2,402,309
7	Agriculture / Industrial	21.2	\$20,298,800	160	\$206,642	\$312,320	\$226,161	\$745,122
8	Distillery	0.4	\$347,900	5	\$3,542	\$7,320	\$1,525	\$12,387
9	Agriculture	10.3	\$396,500	30	\$4,036	\$32,940	\$7,768	\$44,745

* Land and improvements

Data Sources: Carroll County Annual Comprehensive Financial Report (2022); Carroll County Tax Assessor's Office (2023); ESRI Business Analyst (2023); and InfoGroup (2023).

Top-level assessment of the expected fiscal impact of different types of businesses was conducted for conceptual purposes. It is estimated that nearly all individual commercial properties generate less than \$1 million in annual tax revenues for the County. The nine illustrative business examples assessed above generate between \$12,000 and \$2.5 million in tax revenue each year in combined property taxes, corporate income tax, and personal income tax. The factors with the greatest impact on fiscal revenue generation are, in order: (a) number of net new jobs located in the County; (b) average salary of those jobs; and (c) the assessed property value. These align with the factors the County's Economic Development Department currently uses to prioritize potential businesses to attract and to evaluate the types of incentive packages they can offer to new employers.

APPENDIX F

FLU Categorization by Municipality

		Agricultural	Commercial	Conservation	Employment Campus/Mixed Use	Industrial	Institutional	Mining/Resource Extraction	Residential
Finksburg	Commercial		X						
	Conservation			X					
	Industrial General					X			
	Industrial Restricted					X			
	Low Density Residential								X
	Suburban Residential								X
Freedom	Agricultural	X							
	Commercial-High		X						
	Commercial-Low		X						
	Commercial-Medium		X						
	Reservoir			X					
	Resource Conservation			X					
	Employment Campus				X				
	Industrial-Light					X			
	School						X		
	Transportation						X		
	Residential-High								X
	Residential-Low								X
	Residential-Medium								X
	Hampstead	General Business		X					
Local Business			X						
Groundwater Recharge				X					
Private Conservation				X					
Public Conservation				X					
Residential Business					X				
Residential Office					X				
Restricted Industrial						X			
R-10000									X
R-40000									X
R-7500									X
Historic									

APPENDIX F

FLU Categorization by Municipality

		Agricultural	Commercial	Conservation	Employment Campus/Mixed Use	Industrial	Institutional	Mining/Resource Extraction	Residential
Manchester	General Business		X						
	Local Business		X						
	Conservation			X					
	Community Residential								X
	Low Density Residential								X
	Medium Density Residential								X
	Suburban Residential								X
	Urban Residential								X
Mt Airy	General Commercial		X						
	Transitional Comm		X						
	Open Space			X					
	Office Park Employment				X				
	Industrial					X			
	High Density Residential								X
	Low Density Residential								X
Medium Density Residential								X	
New Windsor	Neighborhood Business		X						
	Conservation Public Use			X					
	Employment Campus				X				
	Village Center				X				
	Light Industrial					X			
	R-1								X
	R-10								X
	R-2								X
	R-3								X
R-5								X	

APPENDIX F

FLU Categorization by Municipality

		Agricultural	Commercial	Conservation	Employment Campus/Mixed Use	Industrial	Institutional	Mining/Resource Extraction	Residential
Sykesville	Downtown		X						
	Conservation			X					
	Mixed Use				X				
	General Industrial					X			
	High Density Residential								X
	Low Density Residential								X
	Medium Density Residential								X
Taneytown	Downtown Business		X						
	General Business		X						
	Conservation			X					
	Urban Mixed				X				
	Industrial					X			
	High Density Residential								X
	Low Density Residential								X
	Medium Density Residential								X
	Suburban Residential								X
Urban Residential								X	
Union Bridge	General Business		X						
	Local Business		X						
	Conservation			X					
	Industrial General					X			
	Industrial Restricted					X			
	Suburban Residential								X
	Urban Residential								X

APPENDIX F

FLU Categorization by Municipality

		Agricultural	Commercial	Conservation	Employment Campus/Mixed Use	Industrial	Institutional	Mining/Resource Extraction	Residential
Westminster	Business		X						
	Central Business		X						
	Commercial		X						
	Downtown Business		X						
	Neighborhood Commercial		X						
	Conservation			X					
	Employment Campus				X				
	Mixed Use Infill				X				
	Industrial					X			
	Housing For Older Persons								X
	Low Density Residential								X
	Planned/Residential								X
Suburban Residential								X	
Urban Residential								X	

APPENDIX G

Countywide Vacant Parcel Map

