
Carroll County Economic Development and Land Use Study

**The first step towards Carroll's
next Master Plan**



Who is Involved?

Department of Planning and Land Management:

- Christopher Heyn, PE, Director
- Mary Lane, Bureau Chief
- Andrew Gray, AICP, Planner

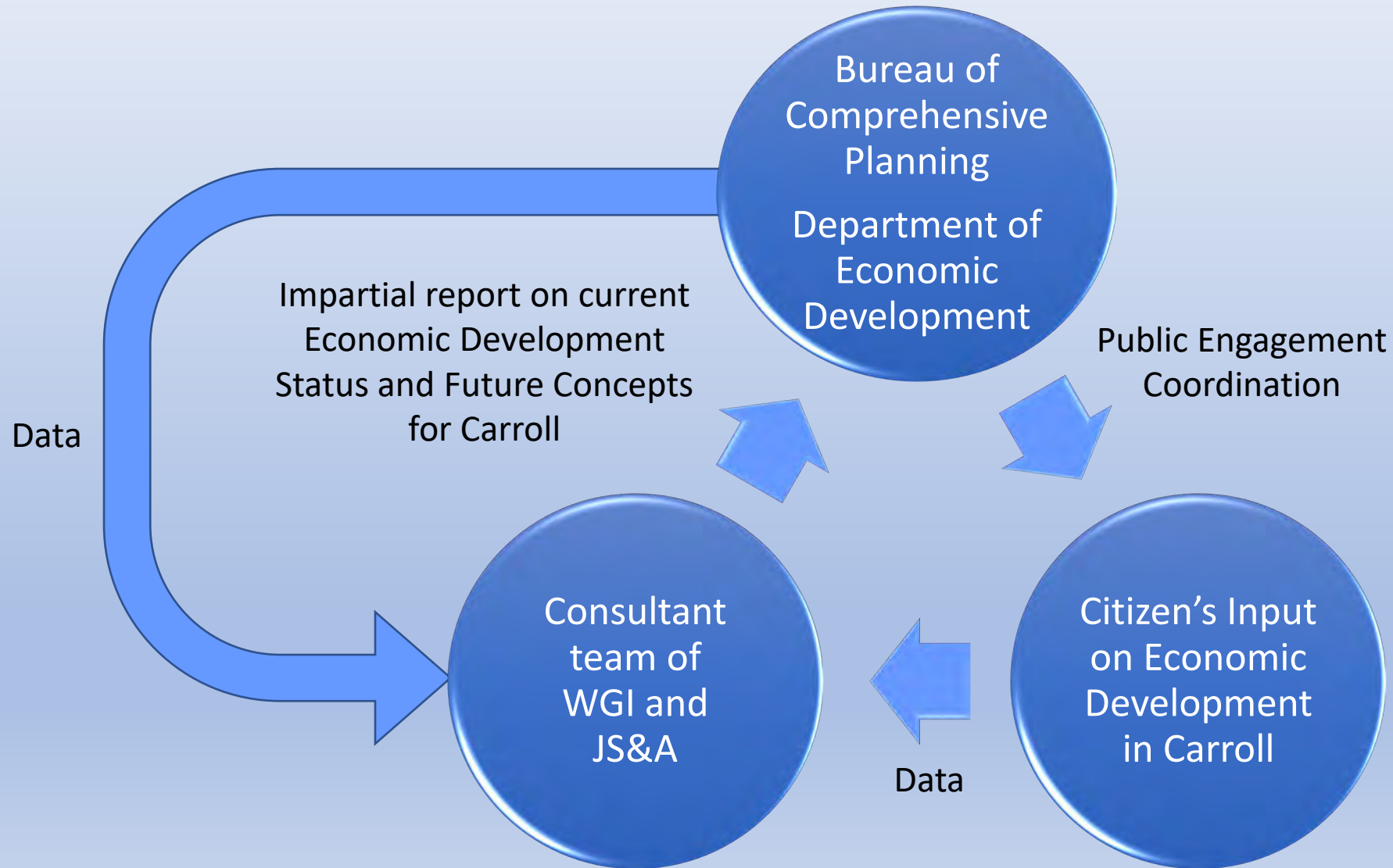
Department of Economic Development:


- Paige Sunderland, Business Development Manager

County Consultants:

- Courtney Powell, AICP, Planning Manager (Wantman Group, Inc. (WGI))
- Jon Stover and Jordan Howard (John Stover and Associates (JS&A))

Joint Effort






PUBLIC OPEN HOUSE

February 16th, 2023
 Exploration Commons at 50 East
 (Carroll County Public Library, Westminster Branch)

The Carroll County Department of Planning, along with consultants WGI and Willdan, are hosting an open house to speak with community members and bring everyone to the table to discuss the future prosperity of Carroll County.

Have a question or concern?
 For more information available on the Study, please contact the Carroll County Department of Planning.
 phone: (410) 386-5145
 email: ccplanning@carrollcountymd.gov



Agenda
 5:00 PM Doors Open




Puertas Abiertas al Público

El 27 de Abril, a las 5:00P.M.

Exploration Commons at 50 East
 (Carroll County Public Library, Westminster Branch)

The Carroll County Department of Planning y los consultores WGI y JS & A, le darán la bienvenida a la segunda reunión del estudio para EDLU. Revisaremos los resultados de la primera reunión y discutiremos cuales oportunidades de crecimiento económico están alineados con la visión de la comunidad.

¿Tiene Preguntas or Preocupaciones?
 Para más información:
 Llame: (410) 386-5145
 Envíe un correo electrónico: ccplanning@carrollcountymd.gov



Agenda

5:00 PM.	Las puertas abren
5:30 PM.	Presentación
6:00 PM.	Actividades

Puede escanear el código para ver el sitio internet del estudio!



Public Engagement

- First Public Workshop:
 - February 16 at Exploration Commons
- Information Table:
 - March 29 – Coppermine Pantherplex (Former NCHS)
- Second Public Workshop:
 - April 27 at Exploration Commons
 - May 9 at Carroll Community College
 - May 12 at Thunderhead Bowl
- Student and Online Outreach



Today's Objective

- County Consultant will provide an overview of the Study.
- Staff/Consultant would like Commissioner feedback.
- Ample time after the presentation for Q&A.
- **No action is required**, since this Study will be a resource to help inform upcoming discussions for the next County Master Plan.



CARROLL COUNTY • MD

ECONOMIC DEVELOPMENT & LAND USE STUDY



CARROLL COUNTY ECONOMIC DEVELOPMENT & LAND USE STUDY

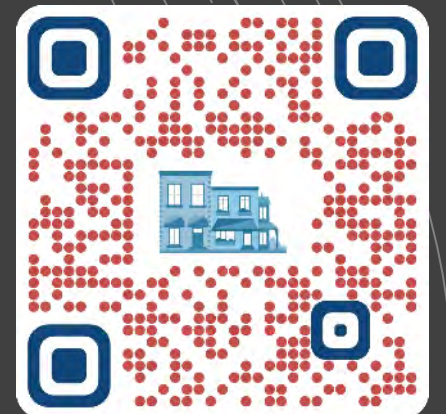


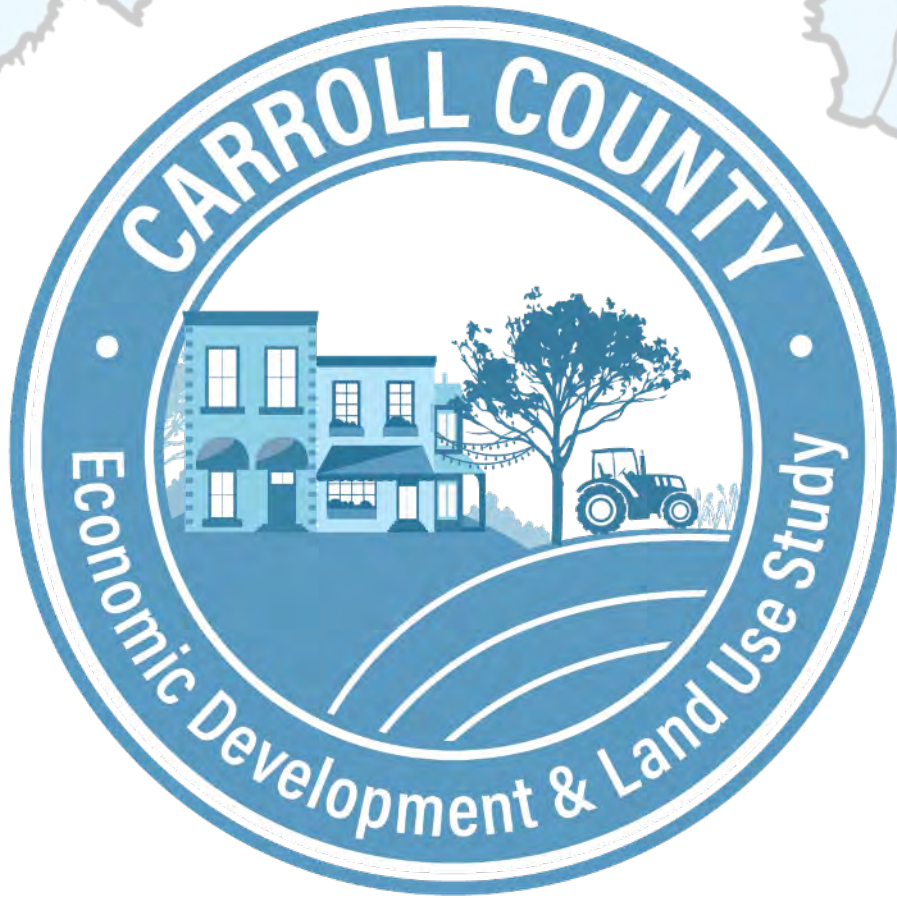
[Click Here Now to Read the Draft Study](#)

More Information

<https://www.carrollcountymd.gov/government/directory/planning/comprehensive-county-plans/county-master-plans/carroll-county-economic-development-land-use-study-new/>

OR





BOARD OF COUNTY COMMISSIONERS

December 21, 2023



*Visit the
project
website:*



WHERE ARE WE ON THE PROJECT TIMELINE?



“ You have a community of people with families that are always looking for opportunities to be a part of something special. ”

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.

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.

6,200 BUSINESSES

54,197 EMPLOYEES IN CARROLL COUNTY

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 a farm that is generally owned and operated by a family under sole proprietorship, partnership or a family corporation.

Carroll County is ranked as the **TOP 10 OF MARYLAND'S COUNTIES BY GDP**.

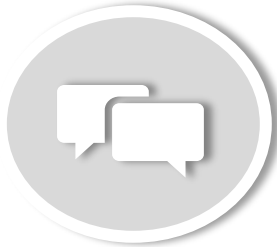
County, retain existing businesses, target support for large corporations and entrepreneurs alike, and enhance workforce development that benefits Carroll County's residents and workers.

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.



WHAT HAS BEEN ACCOMPLISHED?

PHASE 1



Communications Plan



Project Management Plan



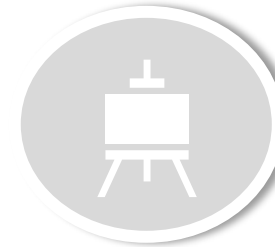
Public Engagement and Outreach Plan



Project Branding



Countywide Site Visit Tour



Public Open House and Survey #1

PHASE 2



Stakeholder Interviews



Focus Groups



Demographic, Zoning, and Land Use Analysis



Legal and Regulatory Assessment



Peer Benchmarking Assessment



Asset Mapping

PHASE 3



Draft Study



Acceptance of Final Study

WHAT PUBLIC ENGAGEMENT OCCURRED DURING THE PROCESS?

350+ Total Participants

Stakeholder Interviews

Focus Groups

In Person Open Houses

Open House Surveys

Business Climate Survey

Student Survey

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 home-grown 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?

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

- 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

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

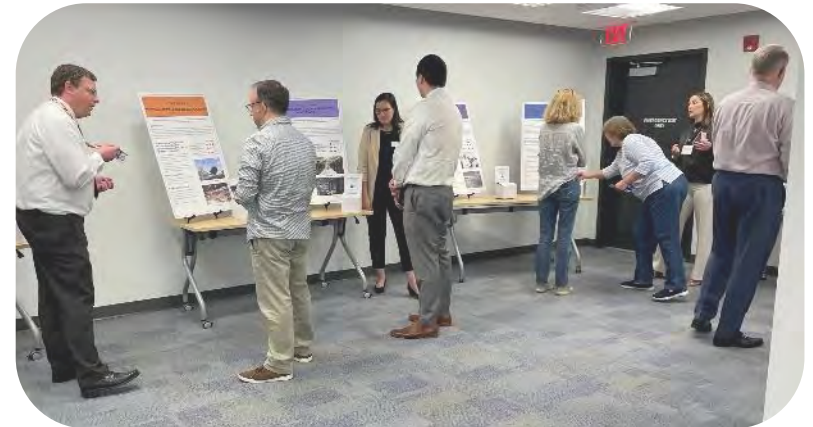
- Operational sustainability may be challenging
- Often contingent on funding for start-ups
- Incubators may rather locate in surrounding counties



Local Small Business



Local Small Business



STUDY SECTIONS

1

ECONOMIC PROFILE

2

REAL ESTATE MARKET OVERVIEW

3

DEVELOPMENT FUNCTIONS

4

ZONING AND LAND USE ANALYSIS

5

GROWTH SCENARIOS

6

OPPORTUNITIES



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.

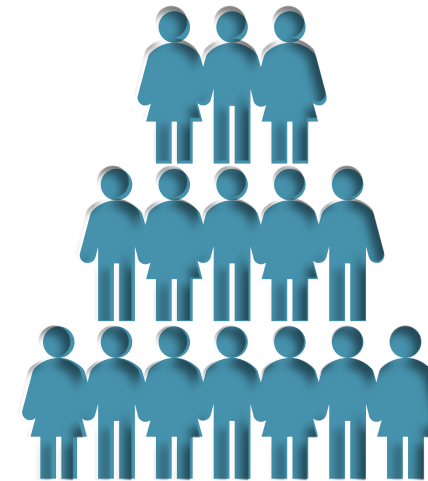
POPULATION TRENDS

County	2000	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%
Adams County, PA	91,292	104,939	15%	0.62%

Regional Population Trends

Table Source: Jon Stover and Associates, July 2023

Data Source: Esri Community Analyst



CARROLL COUNTY

↑ 16%

+ 25K



REGIONAL ECONOMIC ACTIVITY

County	Gross Domestic Product (2021)	Share of MSA ¹	Share of State GDP
Carroll County	\$5,774,373,000	3.1%	1.6%
Baltimore County	\$49,710,537,000	26.8%	13.5%
Baltimore City	\$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	0.5%

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

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

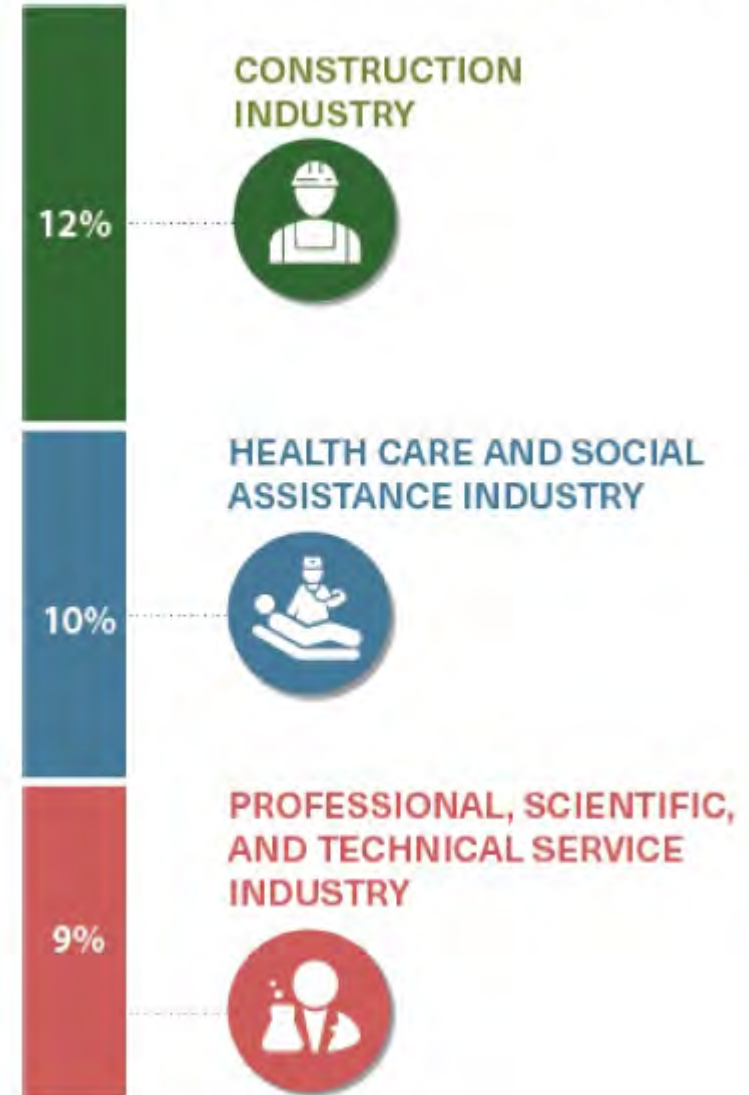


BUSINESSES AND INDUSTRIES

Carroll County reflects a stable economy with a broad economic base of industries.



KEY INDUSTRY SECTORS IN CARROLL COUNTY



EMPLOYMENT TRENDS AND PROJECTIONS

GOVERNMENT AND PRIVATE SECTOR EMPLOYMENT (2022, Q3)

Private Sector: **86%**
Public Sector: **14%**

Note: Employment figures and wages reflective of September 2022.
Data Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Unemployment in the county remains at a 10-year low and below statewide unemployment levels.

COMPARISON OF EMPLOYMENT BASE PROJECTIONS (2022 - 2050)

Carroll County

11%

Region

15%

Harford County

23%

Howard County

35%

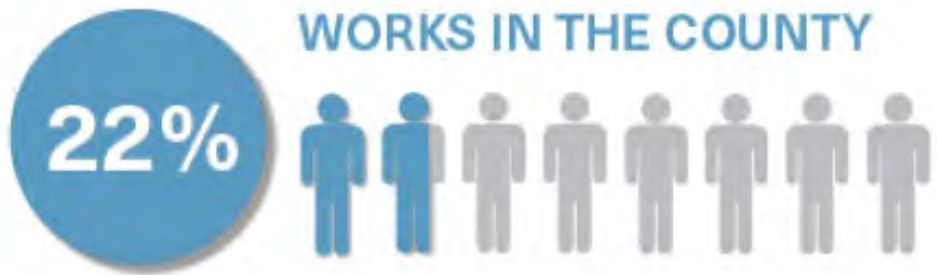
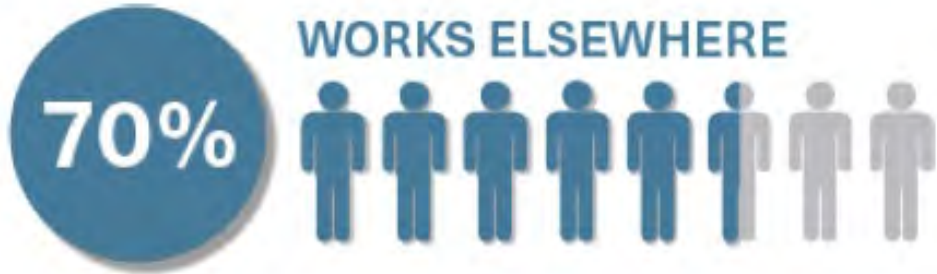
Data Source: Baltimore Metropolitan Council, Cooperative Forecasting Group (2022)

Between 2020 and 2050, the employment base of Carroll County is projected to increase by nearly 11%.



WORKFORCE CHARACTERISTICS

COUNTYWIDE WORKING RESIDENTS & TRAVEL **24** MILES OR LESS TO WORK



Labor force participation rate of:

67% age 16+

86% ages 25-54

(prime-age workers)

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

41% *of workers in the county are eligible for telework*

¹³ Telework eligibility assumed due to employment industry sectors.



KEY ECONOMIC DEVELOPMENT INFRASTRUCTURE AND RESOURCES

Carroll County boasts a robust economic development infrastructure and abundant resources tailored to support businesses, employers, and workforce development initiatives.

- Greater Baltimore Committee
- Small Business Development Center
- Carroll County Office of Tourism
- Carroll County Chamber of Commerce
- Carroll Technology and Innovation Council
- Carroll County Broadband
- Westminster Fiber Optic Network
- Carroll County Workforce Development
- Collegiate Resources and Industry Training



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.

REAL ESTATE MARKET SNAPSHOT

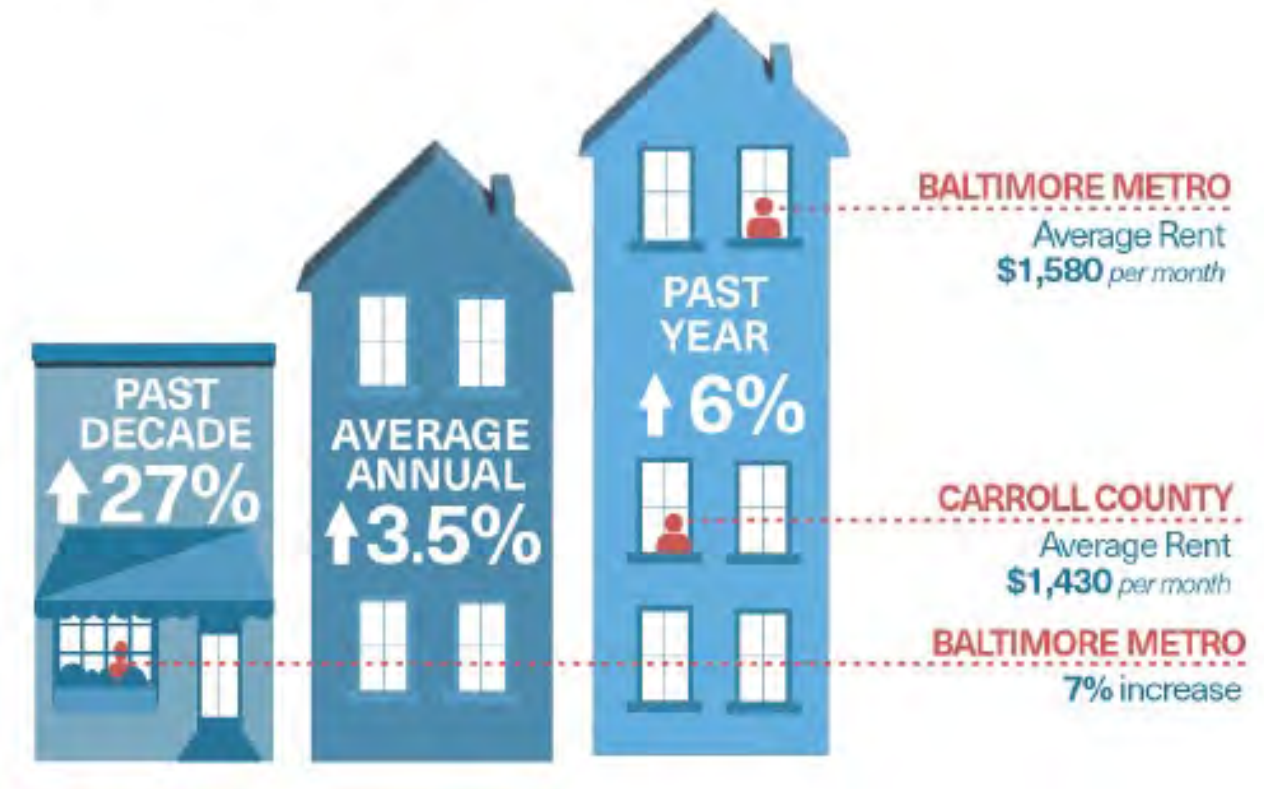
SINGLE FAMILY

★ Sellers housing market

↑ **4.9%** up on median home prices sold more than a year ago

↓ **4.8%** down on the number of homes sold a year ago

MULTIFAMILY AND RETAIL RENTS



COMMERCIAL TRENDS

Office Submarket

2.9M square feet (midsized)

0 square feet of new supply within the last 5 years

8% market cap rate

Hotel/Hospitality Submarket

1989 last time any new large-scale hotels were developed

1 Economy, Midscale, Upper Midscale, and Luxury hotels

Per rented room Revenue largely stabilized to pre-pandemic levels

Industrial Submarket

11.4M square feet (midsized)

134K square feet of new supply within the last 3 years

9.7% rent growth over the past year

Retail/Dining/Entertainment Submarket

132K square feet of new supply within the next 8 quarters

31K+ square feet per year of new supply over the last 2 years

8% rent growth over the past year

Carroll County, between 2008-2023, had a commercial net absorption of over 2.8M square feet

(comparatively lower than that of Howard, Frederick, and Baltimore Counties)

Net Absorption means the total new square footage leased by tenants minus the square footage no longer occupied over a specific period.

Market Cap Rate is a means to assess the strength of an investment by measuring the profitability and return potential over a specific period.

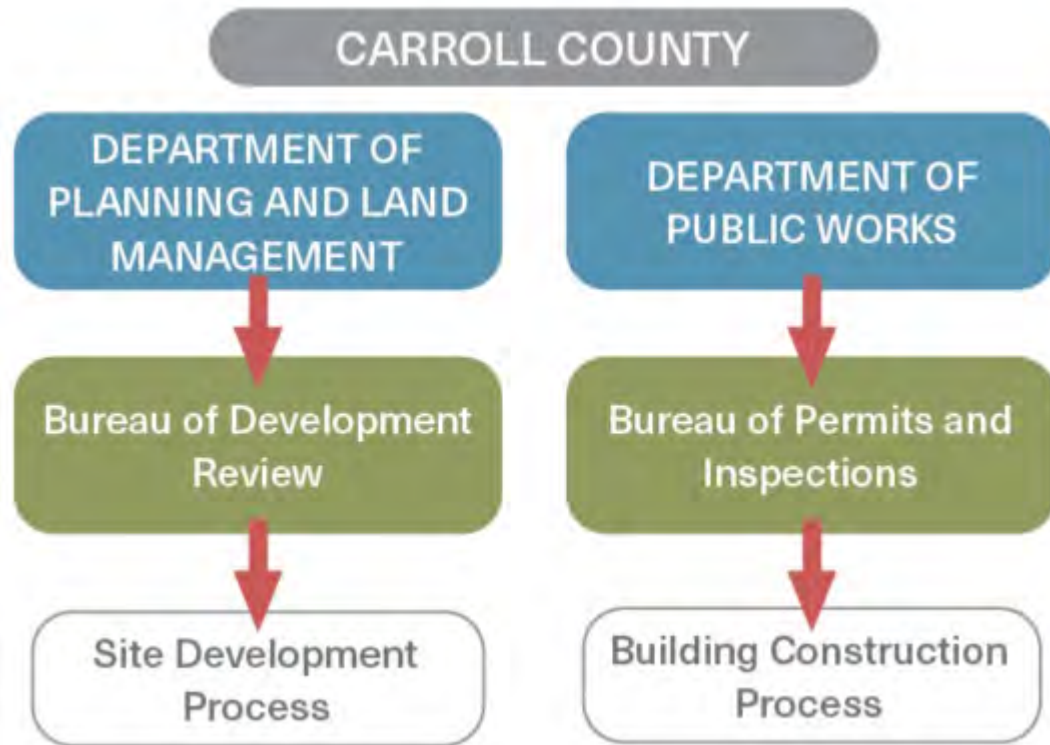
Data Source: CoStar



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.

DEVELOPMENT REVIEW PROCESS RESPONSIBLE AGENCIES



*Carroll County implemented a new improvement to the entitlement process:
Priority Process Review*

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 along with additional assistance from Economic Development.



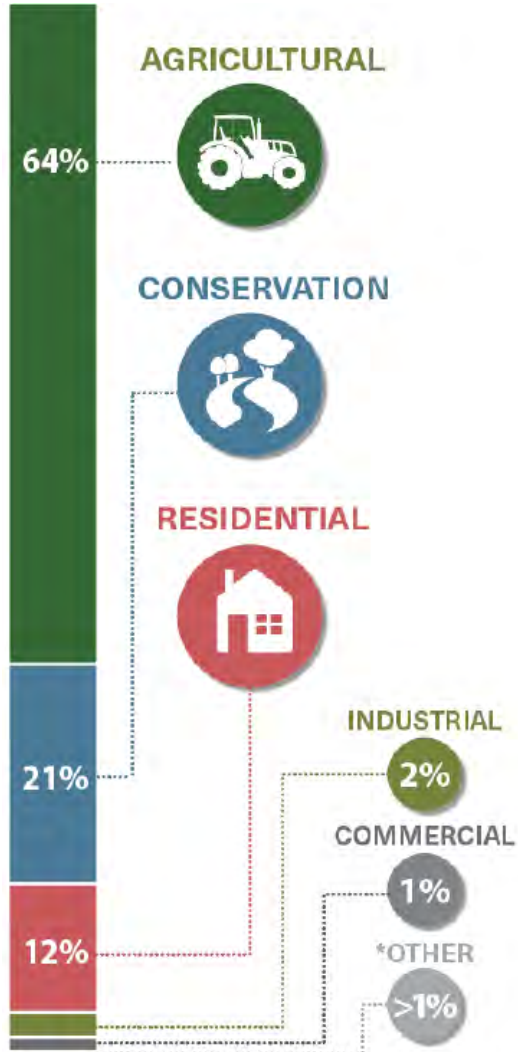
An aerial photograph of a suburban landscape. In the foreground, there is a large, long, tan-colored building with a flat roof, surrounded by a parking lot filled with cars. The building is situated on a slight rise. To the right of the building, there is a winding road and a small pond. The background shows a mix of green fields, trees, and residential houses with white roofs. The sky is clear and blue.

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.

USE PERCENTAGE OF LAND AREA

USE PERCENTAGE OF COUNTYWIDE LAND AREA (Unincorporated and Incorporated Carroll County)



Carroll County has the second lowest of land zoned Commercial and has a low percentage of Industrial land compared to its peers.

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

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



DESIGNATED GROWTH AREAS (DGAs) / MUNICIPAL GROWTH AREAS (MGAs)

DGA/MGA DEVELOPABLE LAND AREA

TANEYTOWN

Second largest amount of developable land

TOWN OF UNION BRIDGE

Second largest amount of vacant Industrial land

**Heidelberg Materials North America (Lehigh) owns much of the vacant land for its purposes.*

**TOTAL VACANT INDUSTRIAL LAND
743 ACRES**

CITY OF WESTMINSTER

Largest amount of vacant Industrial land

FREEDOM DGA

Largest amount of developable land

Consistency between municipal and county-designated future use of vacant or underutilized land is most important within these areas.

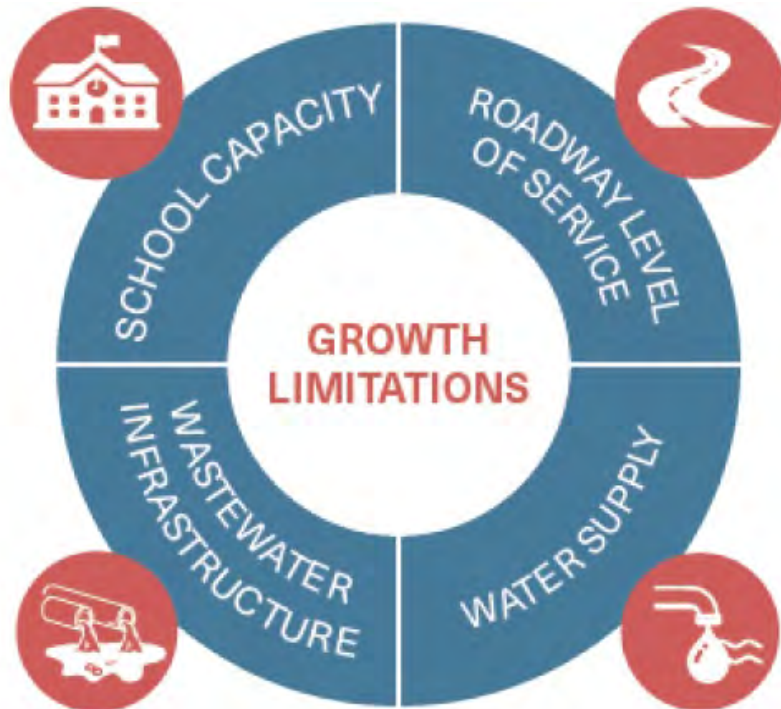
Major transportation corridors present areas for economic opportunity.

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.

GROWTH SCENARIOS

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.



NO GROWTH

LOW GROWTH

MODERATE GROWTH

HIGH GROWTH

78%

A series of **4** growth scenarios (A, B, C, and D) provide guidance on the overarching capacity and feasibility of economic growth.

Opportunities and Constraints fell into **6** categories:

- Market Demand
- Market Development
- Land Use
- Infrastructure
- Fiscal Sustainability
- Public Sentiment

PREFERRED SCENARIO: C

Feasibility Scale

Scenario A

Scenario B

Scenario C

Scenario D

- **350-550K** Average Annual Commercial Absorption (SF)
- **0.8-1.2%** (approx. 1,360 – 2,000 residents)
Population Growth per Year
- **Moderately significant** changes to **existing Future Land Use categories** within MDAs/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

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.

DEVELOPMENT OPPORTUNITIES

COUNTYWIDE VACANT ZONED LAND FOR ECONOMIC DEVELOPMENT OPPORTUNITIES



COMMERCIAL

185
TOTAL ACRES



EMPLOYMENT CENTER

113
TOTAL ACRES



INDUSTRIAL

743
TOTAL ACRES

PRIME CORRIDORS FOR GROWTH OPPORTUNITIES



BALTIMORE BOULEVARD
MD 140

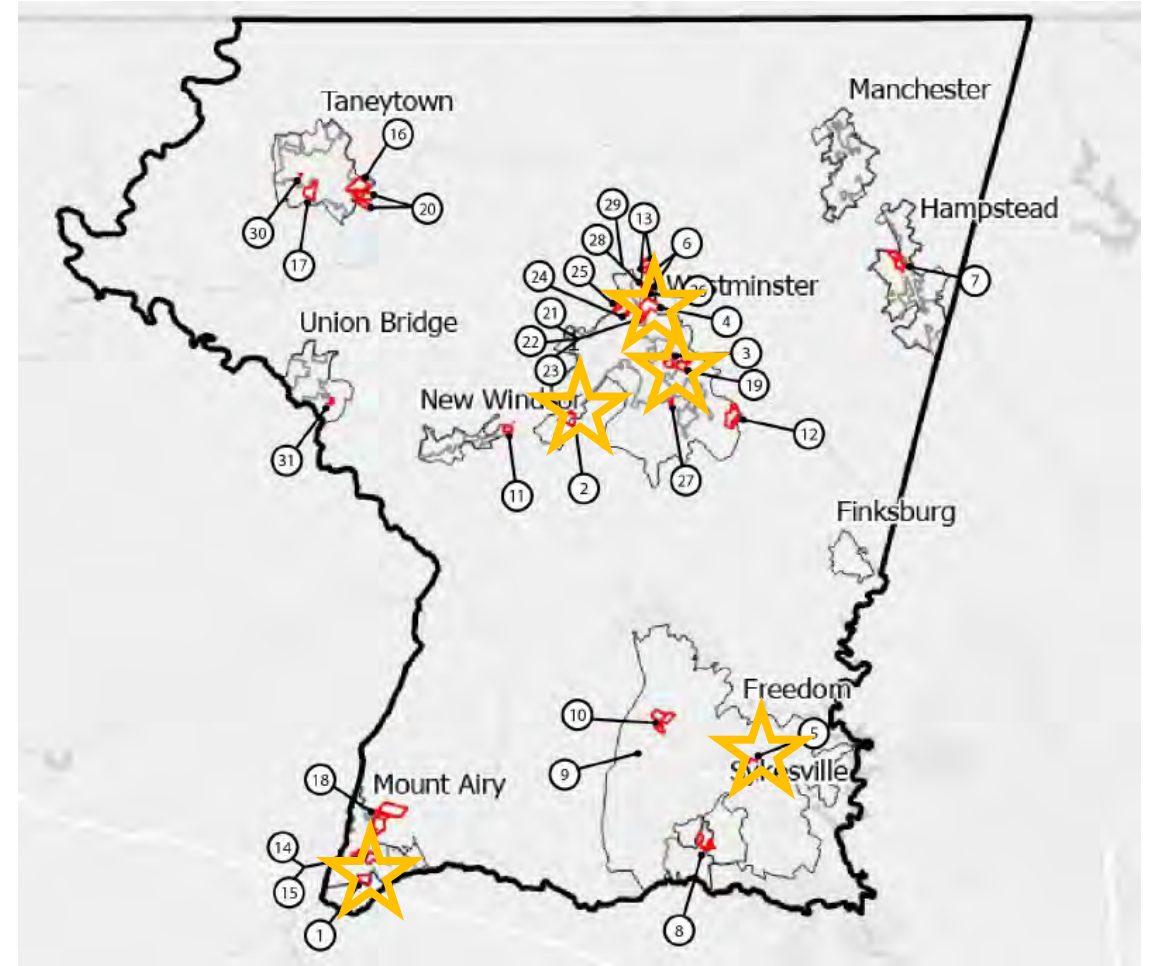


LIBERTY ROAD
MD 26

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 its economic development success.

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



TARGETED INDUSTRIES

TITLE DEED HOSPITALITY AND AGRITOURISM

Businesses and attractions which draw people to Carroll County for vacations, events, and recreation, both in cities and towns and the countryside

SUMMARY

Carroll County's charming cities, towns, and countryside could be better utilized for scenic getaways, excursions into nature, and farm-to-table experiences and dining. While the county's diverse attractions are very well known to residents, better promotion could extend the range of people coming to Carroll County for special events, recreation, and eating and drinking. More tourism would benefit local businesses, create jobs, and give residents access to more amenities.

WHAT COULD THE FUTURE OF HOSPITALITY AND AGRITOURISM LOOK LIKE IN CARROLL COUNTY?

- More unique farm-to-table restaurants, wineries, microbreweries, and distilleries for locals and out-of-towners alike to enjoy
- Working with farmers to create visitor experiences on their land, such as u-picks, farm education programs, and overnight farm stays
- Developing infrastructure and facilities for hosting events

OPPORTUNITIES

- Focuses on the preservation and utilization of the cultural, natural, and economic assets of the county
- Leverages and expands the county's high quality of life
- May increase hotel tax revenue for the county

CONSIDERATIONS

- Likely supplements existing agricultural industry rather than create dedicated new industry sectors
- Growth would be located both in already developed areas and in the agricultural countryside
- Change in traffic patterns with new uses and events
- New job creation likely service industry workers and may not require skilled labor

	LOW - HIGH		
LAND COVER	●	●	○
CONCENTRATION OF NEW JOBS	●	●	○
ECONOMIC IMPACT	●	●	○



Wagon Ride



Animal Education for All Ages

TITLE DEED MANUFACTURING

Companies and shops which create products small and large for businesses and consumers

SUMMARY

Carroll County could benefit economically from inviting manufacturing industries to locate here. Creating and producing finished products from raw materials using a trained labor force, machines, tools, and other equipment could further Carroll County's position as a regional manufacturing leader. Attracting the right manufacturing companies could produce high paying jobs for Carroll County residents.

WHAT COULD THE FUTURE OF MANUFACTURING LOOK LIKE IN CARROLL COUNTY?

- Steady, reliable careers for residents in manufacturing such as auto industry, medical equipment, and electronics
- Expanding existing business and industrial parks and prioritizing the opening of new ones
- Permitting workforce housing allowing more employees to live near their jobs

OPPORTUNITIES

- Carroll Community College incentivizes skills training program enrollment
- Further growth and development of Carroll County Career and Technology Center programs
- Roofs could double as solar arrays

CONSIDERATIONS

- Increasing industrial assessable tax base
- Increase in large truck traffic associated with uses

	LOW - HIGH		
LAND COVER	●	●	●
CONCENTRATION OF NEW JOBS	●	●	○
ECONOMIC IMPACT	●	●	○



Welding Products



Manufacturing Equipment and Assembly

TITLE DEED SMALL BUSINESS INCUBATION

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

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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


	LOW - HIGH		
LAND COVER	●	○	○
CONCENTRATION OF NEW JOBS	●	●	○
ECONOMIC IMPACT	●	●	○



Local Small-Business



Local Small-Business



"I would love to see the county attract new jobs while maintaining our agricultural heritage."

The County already utilizes some tools and incentive mechanisms and can expand upon those efforts.

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

The factors with the **greatest impact** on fiscal revenue generation for Carroll County, in order:

1. **Number of net new jobs**
2. **Average salary of those jobs**
3. **The assessed property value**

Revenues have **declined** overall statewide and revenues in Carroll County have decreased steeper than average. Carroll County has an **opportunity** to assess other development sources of funding for transportation and other non-residential needs.

County fiscal revenues mostly come

42% from income tax

- Largely generated by **commercial** properties including **office**, **industrial**, **flex**, **retail**, and agricultural land uses

or

44% from property tax

- Largely generated from **residential** properties

Transportation Impact Fee Considerations

Provide a dedicated source of revenue to fund transportation infrastructure improvements

- Fairness
- Proactive Planning
- An Enhanced Quality of Life
- Attractive Development
- Costs Passed to Consumers
- Complexity
- Impact on Development
- Equity Concerns

Case Studies

Montgomery County, MD
Baltimore, MD
Gaithersburg, MD

Property Specific County Revenue Generation

A top-level assessment of the expected fiscal impact of different types of businesses was conducted for conceptual purposes.

9 illustrative business examples assessed that fall within the following Industry Sectors:

- **Tourism and Hospitality**
- **Manufacturing**
- **Office**
- **Industrial**

Illustrative Revenue Generation

*Between
\$12K - \$2.5M
in yearly tax
revenue*

Top Factors

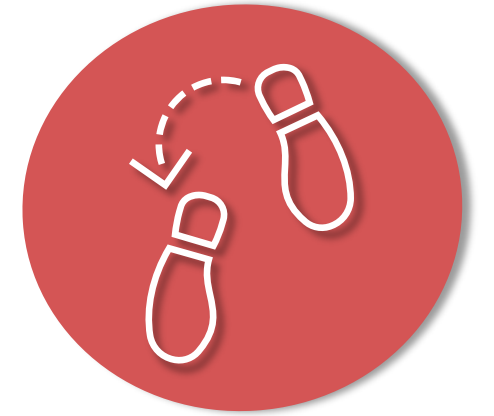
- 1. Number of new net jobs*
- 2. Average salary of these jobs*
- 3. Assessed property value*

WHAT ARE OUR NEXT STEPS?

Acceptance of Final Study



Project Closeout



QUESTIONS

SUBMIT COMMENTS TO
THE CARROLL COUNTY
DEPARTMENT OF PLANNING AND
LAND MANAGEMENT

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Visit the project website:



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