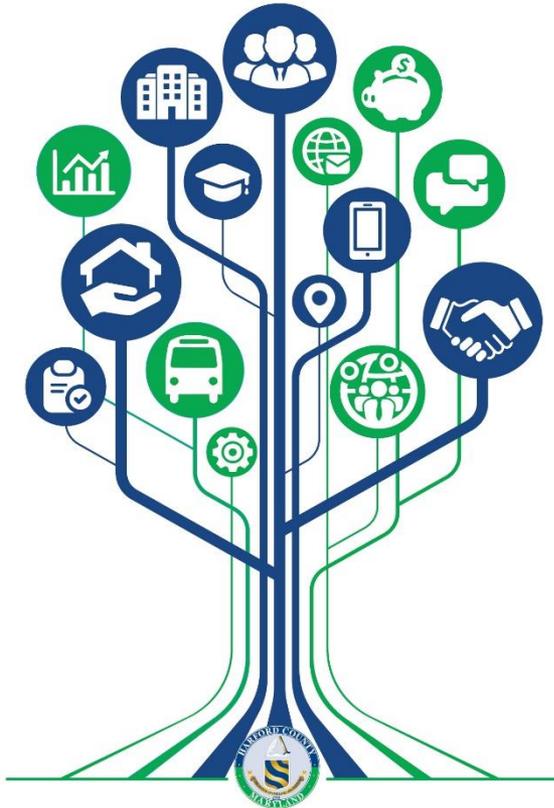




**Barry Glassman**  
Harford County Executive

# NEW DEPARTMENT



**HARFORD**  
COUNTY

COMMUNITY & ECONOMIC DEVELOPMENT

BARRY GLASSMAN, COUNTY EXECUTIVE  
LEN PARRISH, DIRECTOR



*Transit Services*



*Workforce Development*



*Funding Programs*



*Site Incentives*



*Business Services*



*Housing Services*

# TIMELINE



*Ag & Home Building; Land Use Plan/Zoning Established*

1972



*Agricultural, Home Construction & Distribution; APG Expansion*

1995

1917

*Agricultural & Canning; APG Established*



1980

*Agricultural, Home Building Distribution; Riverside Business Park Built*



*Manufacturing, Distribution, Commercial IT, Electronics, APG Transformation*

2005



*Advanced Manufacturing Materials Partnership, Logistics Management, Futures Command*

2019

2000

*Manufacturing, Distribution, Technology; Niche Agriculture*



2017

*Technology Commercialization*

# AMMP

# LOCATION



**Highways:** Interstate 95; MD 24;  
U.S. Rt. 1; U.S. Rt. 40

**Transit:** Harford Transit LINK;  
MTA; Rideshare

**Freight:** CSX Transportation  
Norfolk Southern

**Commuter:** AMTRAK; MARC Train

**32 miles:** Baltimore/Washington  
International Airport

**78 miles:** Philadelphia  
International Airport

**32 miles:** Port of Baltimore

**48 miles:** Port of Wilmington

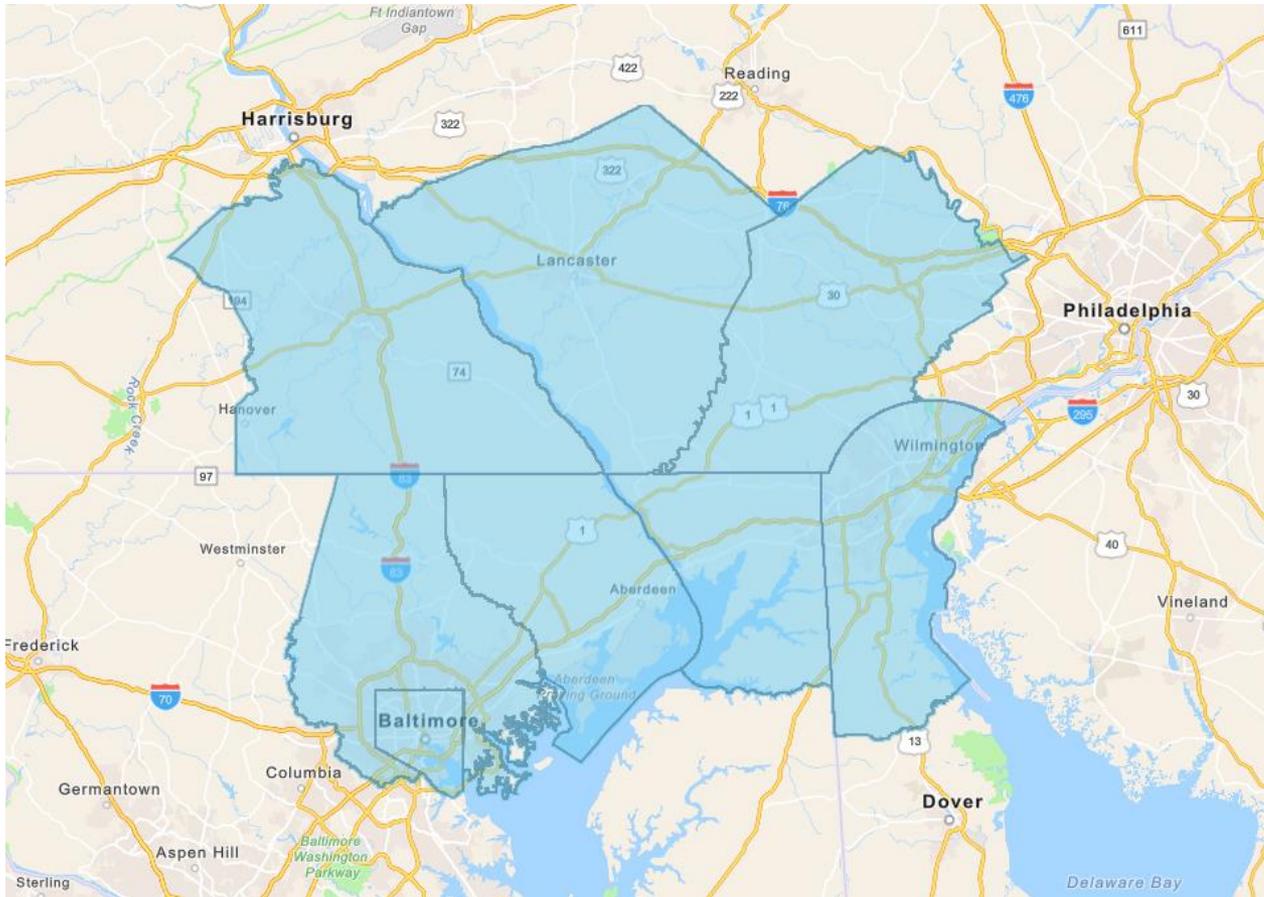
**82 miles:** Port of Philadelphia

**165 miles:** Port of NY & NJ

\* Distances from Bel Air



# REGIONAL WORKFORCE



- 1.7 million+ professionals within 90-minute commute
- Workforce draws from 3 states and 7 counties

# LAND USE MAP



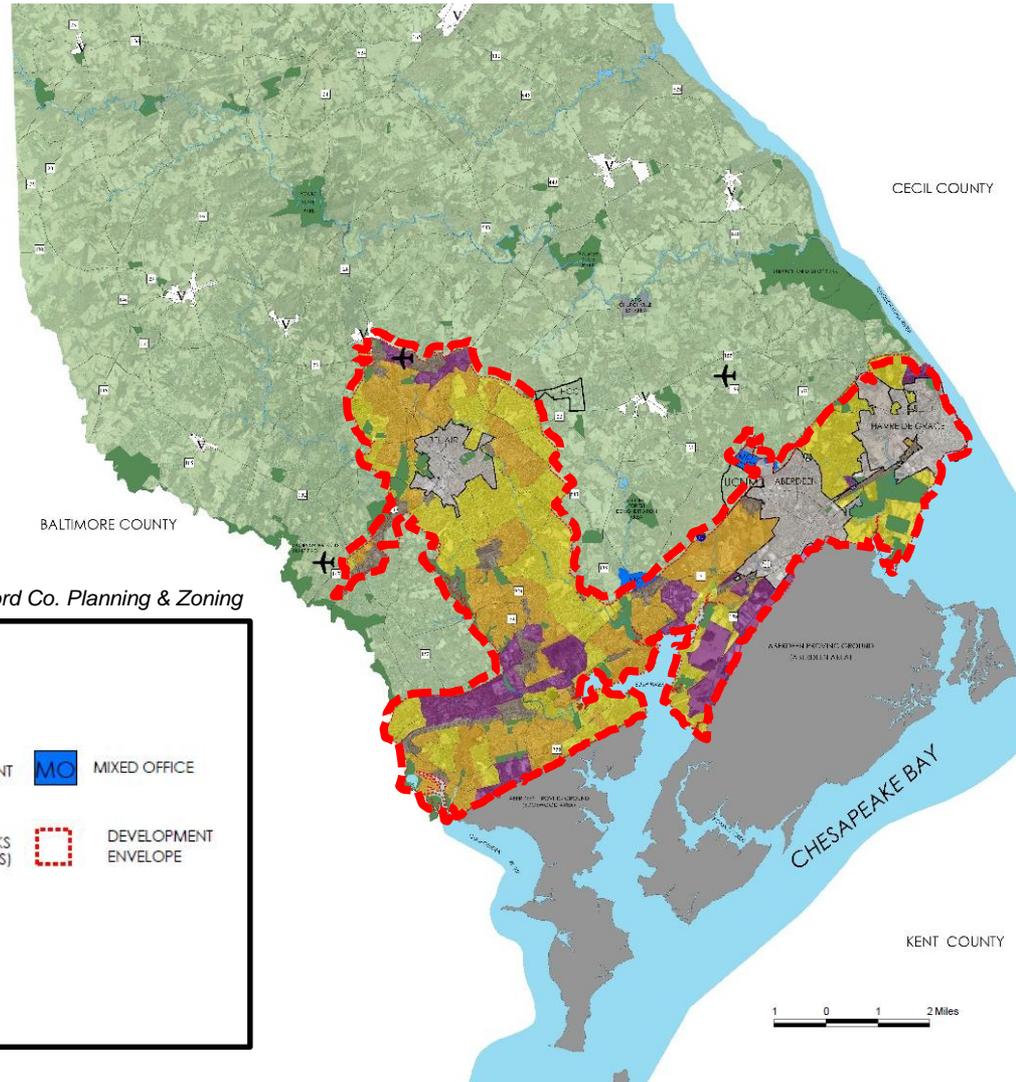
**Total Development Envelope Capacity (EC)**  
**16,953 units**

**Total Unincorporated County Development EC**  
**15,104 units**

**Potential Dwelling Units from Municipalities**  
**2,317 units**

**Population Density of Development Envelope**  
**2,118 persons / square mile (2015)**

**Development Envelope** -----



Source: Harford Co. Planning & Zoning

## LAND USE MAP

### 2016 LAND USE ELEMENT PLAN

AGRICULTURAL	RURAL VILLAGE	INDUSTRIAL / EMPLOYMENT	MIXED OFFICE
LOW INTENSITY	AIRPORT	STATE AND COUNTY PARKS (GREATER THAN 10 ACRES)	DEVELOPMENT ENVELOPE
MEDIUM INTENSITY	HCC HARFORD COMMUNITY COLLEGE	MUNICIPAL	
HIGH INTENSITY	UCNM UNIVERSITY CENTER OF NORTHEASTERN MARYLAND	ABERDEEN PROVING GROUND	



## RESIDENTIAL REAL ESTATE SALES TRENDS

	2012	2013	2014	2015	2016	2017	2018	2019*
<b>Average Days on Market</b>	112	91	93	92	78	64	52	48
<b>% Change</b>	-12.5%	-18.75	2.2%	-1.08%	-15.22%	-17.95%	-14.14%	-4.78%
<b>Average Sold Price</b>	\$255,628	\$259,547	\$258,875	\$260,509	\$264,575	\$274,439	\$305,103	\$351,441
<b>% Change</b>	1.68%	1.53%	-0.26%	0.63%	1.63%	3.66%	2.5%	4.4%

Source: RBI/MRIS MarketStats; 2019 average is to September

- Harford County has been consistently under 5% of the aggregate Maryland Foreclosure totals since Q1 2010
- Total number of foreclosures down 6.5% from the first quarter of 2016

# EMPLOYMENT



## EMPLOYMENT (2000-2019)

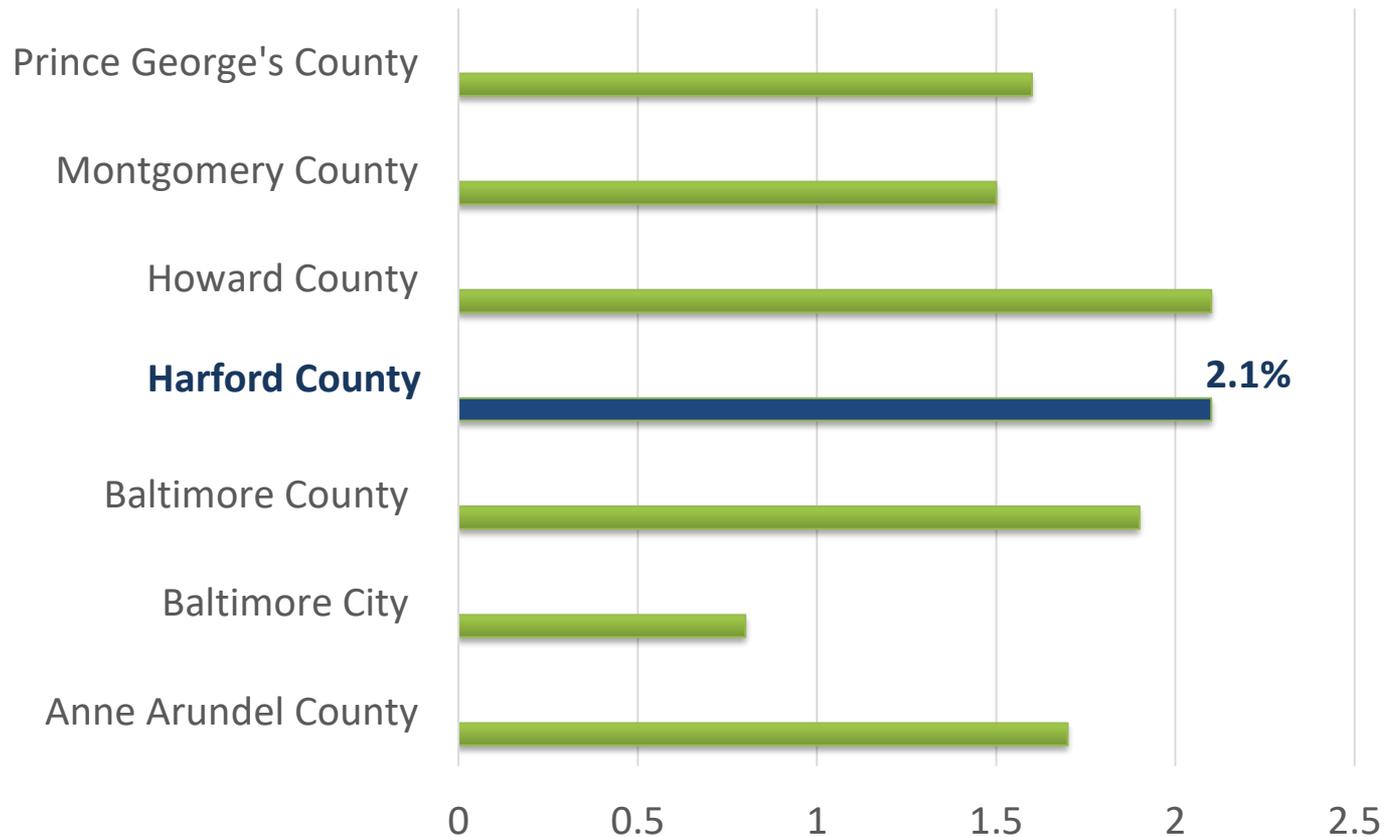
Employment	2000	2016	2017	2018	2019*	% Change '00-'19
Total employment	67,994	91,827	93,443	94,501	93,981	+38.22%
Private Sector	51,960	71,669	73,109	74,115	73,204	+40.89%
Government Sector	16,034	20,646	20,334	20,385	20,778	+29.59%
Wages (Average Weekly Wage)	2000	2016	2017	2018	2019*	% Change '00-'18
Total employment	\$573	\$972	\$988	\$998	\$1,054	+83.94%
Private Sector	\$513	\$839	\$854	\$875	\$890	+73.49%
Government Sector	\$770	\$1,433	\$1,471	\$1445	\$1,631	+111.82%
Household Income (Median Annual)	2000	2010	2015	2016	2019 proj	% Change '00-'19
	\$57,234	\$77,010	\$80,465	\$84,175	\$90,220	+57.60%

Source: MD DLLR – Quarterly Census for Employment and Wages; U.S. Census Bureau 2000-2010; 2019 average through Q1

# JOB GROWTH RATE



## Jobs Growth Rate Percentage



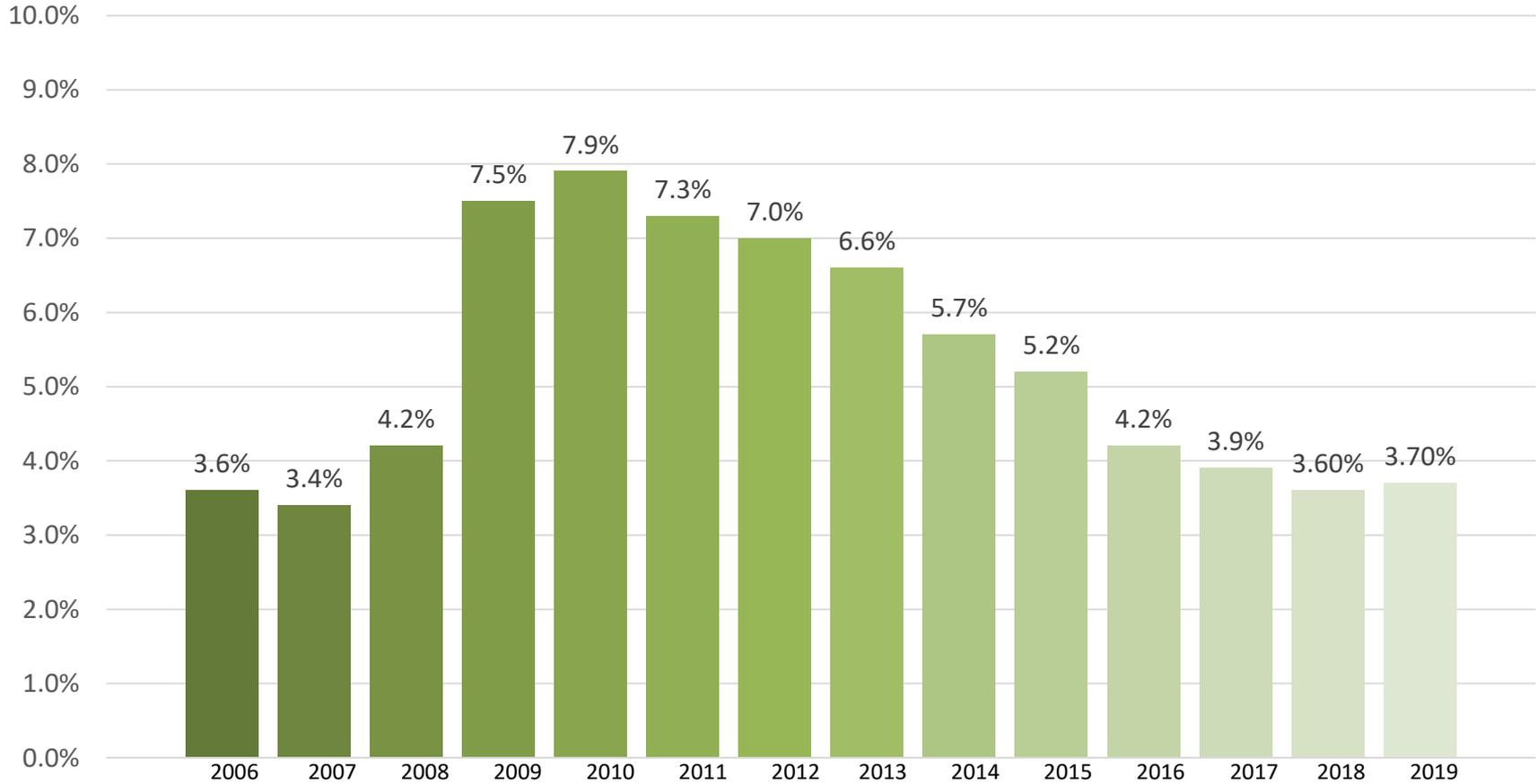
Source: NACo County Explorer 2016

- Harford County had the second highest growth rate in Maryland at 2.1%

# UNEMPLOYMENT



Average Yearly Unemployment 2005 - 2019

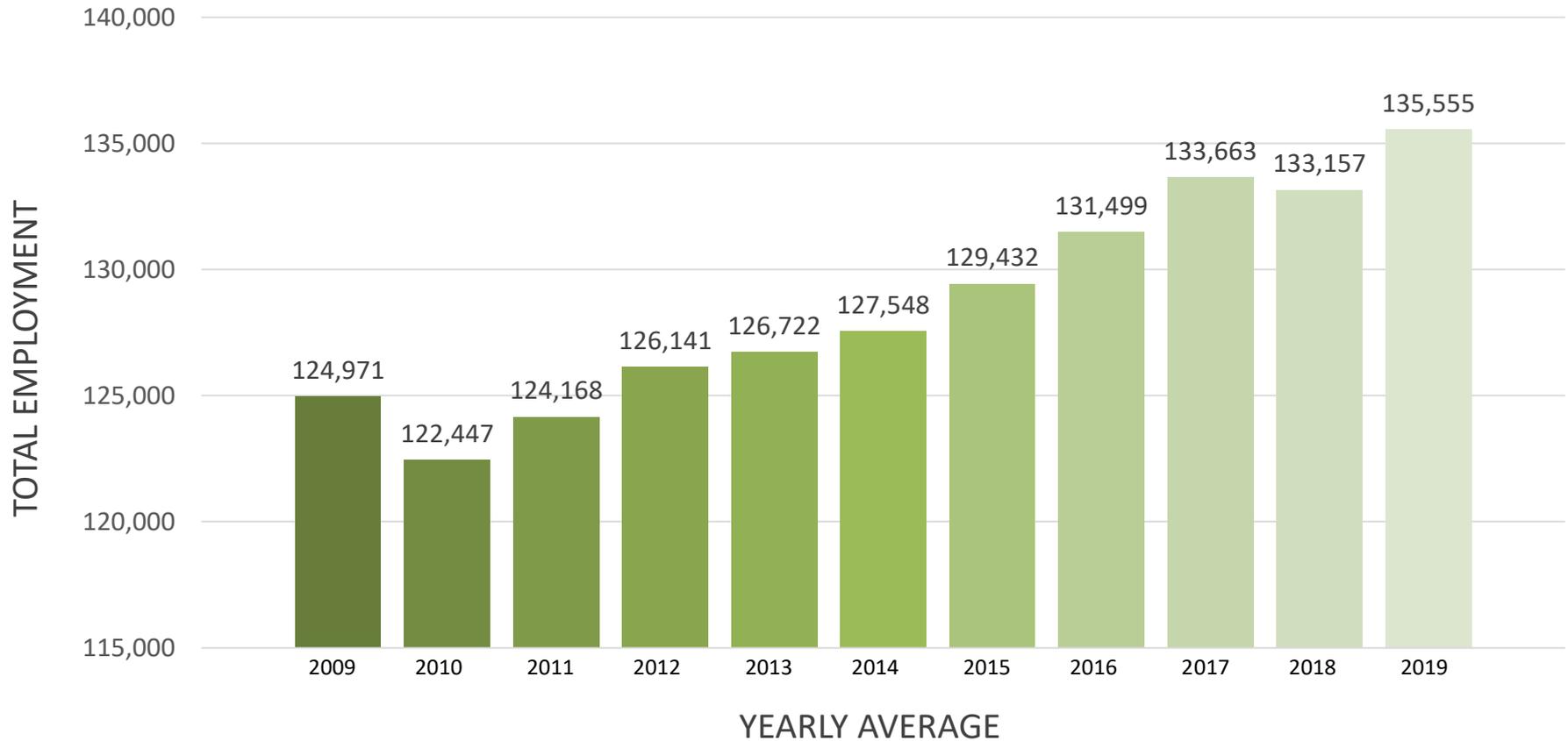


Source: MD DLLR – Local Area Unemployment Statistics ; 2019 average is to September

# EMPLOYMENT



## Total Harford County Employment



Source: MD DLLR – Local Area Unemployment Statistics ; 2019 average is to September

# NEW AND EXPANDING



## 2017-2019 SELECT NEW AND EXPANDING COMPANIES

YEAR	COMPANY	NEW OR EXPANSION	CAPITAL INVESTMENT	JOBS CREATED	SQUARE FOOTAGE
2019	The Container Store	New	\$14,000,000	100	600,000
2019	La Quinta	New	\$6,800,000	30	39,000
2019	Sprouts Farmers Market	New	\$2,500,000	50	33,000
2019	Lorien Health Systems	Expansion	\$7,700,000	50	66,000
2019	Harford Crisis Center	New	\$3,000,000	15	15,900
2018	Kuehne & Nagel	New	\$24,000,000	225	656,800
2018	Miller's Ale House	New	\$3,000,000	20	6,310
2018	Canton Carwash	New	\$5,000,000	20	8,537
2017	BSC America	Expansion	\$20,000,000	90	125,000
2017	Dunlop Industrial & Protective Footwear, Inc	Expansion	\$5,800,000	15	--
2017	Kaiser Permanente	New	\$2,500,000	23	20,383
2017	Tic Gums	Expansion	\$4,000,000	4	--
2017	United Foods International USA	New	\$5,000,000	25	40,600

# VACANCY RATES



	Square Footage	Current Vacancy Rate	Average Rental Rate
Total Office Space	5,955,779	14.0%	\$21.82
Total Industrial Space	24,601,694	8.0%	\$5.36
Total Retail Space	12,450,683	4.3%	\$19.60



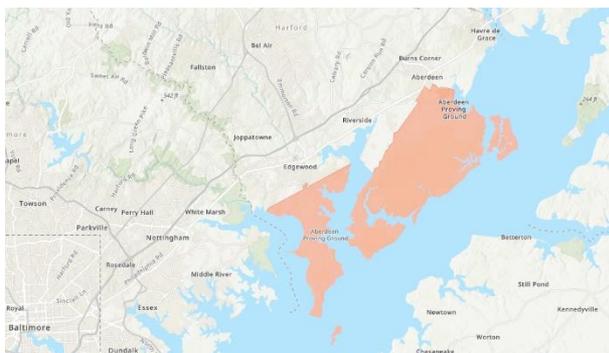
Source: CoStar Q3, 2019

# ABERDEEN PROVING GROUND



## By the Numbers:

- \$5.1B IN ANNUAL ECONOMIC IMPACT
- FY 2019 contracts
  - \$9.6b total contracts awarded
  - \$1.2b contracts awarded to Maryland small businesses; \$236m awarded to Harford county businesses
- 4000 PhDs, engineers, & other advanced degrees
- Average employee age is 48
- 2 Airfields
- Army's Largest Enhanced Use Leasing (EUL) Site (415 acres)
- Army's premier Chem/Bio Surety Mission
- Growing MD National Guard Presence
- Unique facilities for National Research and Development
  - Sample Receipt Facility (SRF)
  - Underwater Explosives Pond (UNDEX)



### MISSION

## Aberdeen Proving Ground AT A GLANCE

APG's contribution to the Nation: Army's premier home of innovation in support of joint warfighter readiness.



### CORE MISSIONS: 6 Centers of Excellence

- ➔ Command, Control, Communications, Computers, Cyber, Intelligence, Surveillance, Reconnaissance (C5ISR)
- ➔ Chemical & Biological
- ➔ Personnel Security Investigations
- ➔ Public Health Sciences
- ➔ Research & Development
- ➔ Test & Evaluation

**6<sup>th</sup>** Largest Employer in the State of Maryland

The Largest Employer in Harford County & Iconic Landmark of the Local Area

**39,289+** Jobs Supported by APG

**\$2.1 Billion** in Wages

**90+** Tenant Organizations

**11** Major Commands

**TOTAL WORKFORCE:** 21,000+



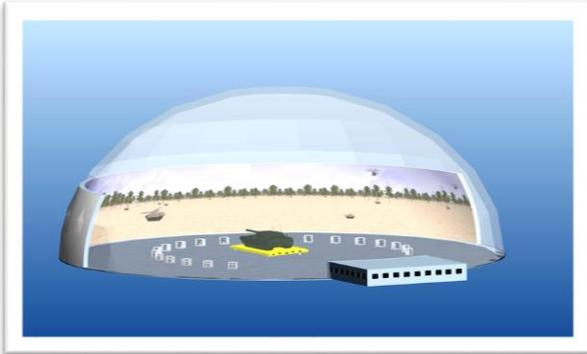
6% Military  
47% Civilian  
47% Contractor

### APG LABORATORIES

5.7 Million Square Feet (1 Million Applicable to Cyber)

66,000-Acre Range and Test Facility

19 Million Square Feet of Building Space



## Aberdeen Test Center (ATC)

- Moving Target Simulator
- \$14.6 MIL
- 31,000 square feet
- State-of-the-Art combat systems simulation lab
- Currently in FY25 Program Objective

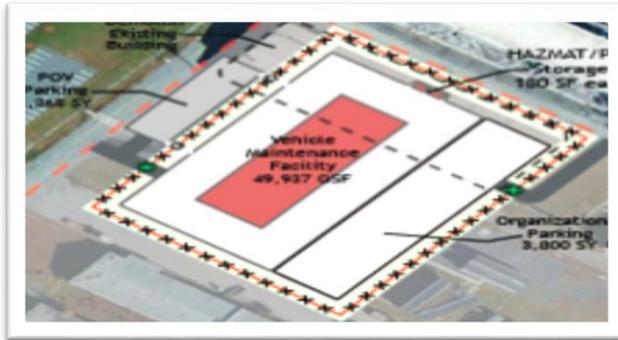
Memorandum

## Army Research Laboratory (ARL)

- Artificial Intelligence (A2I2) High-Performance Supercomputing Complex
- \$35.0 MIL
- 115,000 square feet
- State-of-the-Art artificial intelligence labs and administrative space
- 2<sup>nd</sup> Phase Funded at \$12.0 MIL

## Public Health Command, Headquarters

- \$52.0 MIL
- 123,000 square feet
- In Planning Phase



## HIGH TECH INFRASTRUCTURE

**\$665 million  
post-BRAC  
investment**

### Logistics Readiness Center (LRC)

- General Maintenance Complex
- \$24.0 MIL
- 51,000 SF
- Currently in FY24 Program Objective Memorandum

### Aberdeen Test Center (ATC)

- Test Maintenance & Fabrication Facility
- \$73.0 MIL
- 114,000 SF
- Procurement: Design-Bid-Build
- Award Date: Projected 2020
- Scheduled Completion: JUL 2023

### Chemical Biological Center (CBC)

Chemical – Biological Innovation Hub

- \$76.0 MIL, 120,000 SF
- Emerging Threat Center
- \$94.0 MIL, Size: 155,000 SF
  - In Planning Phase

# DEFENSE



## 151 DEFENSE CONTRACTORS ESTABLISHED IN HARFORD COUNTY

AASKI Technology, Inc.	City Light & Power, Inc.	General Dynamics Information Technology (GDIT)	Melvin May Associates	Sabre Systems, Inc.
ACE Electronics	CMIT Solutions	General Dynamics Mission Systems	Millennium Corporation	Safenet Assured Technologies
ACET	Coherent Technical Services (CTS)	Georgia Tech Research Institute	Millennium Systems International	SAIC
ACSyeS, Inc.	Collins Aerospace	GIO Technologies	Mission 1st Group	SciTech Services, Inc.
Ad hoc Research Associates	Comtech TCS, Inc.	GP Strategies	MITRE Corporation	Shonborn-Becker Systems
Advanced Systems Development	Concurrent Technologies Corp.(CTC)	GSI Family of Companies	Modern Mission Systems	Sigmatech
AECOM	D. Wheatley Enterprises, Inc.	Harris Corporation	Modus Operandi, Inc.	Smiths Detection
Alion Science & Technology	Dalcom	Hi-Tec Systems, Inc.	Man-Machine Sys. Assessment (MSA)	Sierra Nevada Corporation (SNC)
Altus Engineering	DAS Services, LLC	HP White Laboratory	National Technical Systems, Inc.	Scientific Research Corp. (SRC)
ANSER	Data Intelligence	Huntington Ingalls Industries (HII)	Netcentric Technologies, Inc.	SOTERA Defense Solutions
Arinc	Data Matrix Solutions, Inc.	Hythe Research	Netorian	SRI International
ARTI	Data Systems Analysts, Inc. (DSA)	IAP IT & Engineering Solutions	Nexagen Networks, Inc.	SURVICE Engineering
ASRC Federal Holdings Co.	DataPath	IEM	Noblis	Symbolic
Avon Protection Systems, Inc.	DCI Solutions	IncrediTek	Northrop Grumman	Systemk
BAE Systems	DCS Corp.	ITekFed	NTS Chesapeake	T2S Solutions
BANC3	Decisive Data Systems	ITM4G	Optec, Inc.	Technatomy Corp.
Battelle Eastern Science & Technology Center	DHPC Technologies, Inc.	Janus Research Group, Inc.	ORSA Corporation	Tecolote Research
Beacon Associates, Inc.	DRS Technology	JRAD, Inc.	Perspecta	Telcordia Technologies, Inc.
Beacon Environmental Services, Inc.	Elbit	Kord Technologies	Polaris Alpha	Teledyne Brown Engineering, Inc.
Blue Eye Technology	Engility Corporation	L2 Defense	Potomac Fusion	Telos
Boeing Co.	Engineering Solutions Products, LLC (ESP)	L3 Technologies	Praxis Engineering Technologies, LLC	TENAX Technologies
Booz Allen Hamilton	Enviroics USA, Inc.	Leidos	PreTalen	Thales
Bravura IT Systems, Inc.	Envision Innovative Solutions	Link Solutions, Inc.	QED Systems	Torch Technologies
Broadleaf	EPS Corp.	LinQuest	Quantum Research	TRAX
Burrow's Management	Excet Incorporated	LMI	Quviant	Trideum
CACI	Exeter Government Services	Lockheed Martin	Raytheon	UIC Government Svcs. (Bowhead)
CAS Severn, Inc.	Fastenal	Lockwood Group, LLC	RDA Technical Services	Universal Solutions International, Inc.
CAS-tek	Federal Radio (TASC Systems)	Lufburrow & Co, Inc.	RoundTable Defense	Ventronix Corporation
CCL Biomedical, Inc.	Future Skies, LLC	ManTech International Corp.	RTR Technologies, Inc.	Vidovich Engineering Solutions, LLC (VES)
CGI Federal	Gemalto	Manufacturers Services Associates, Inc. (MSA)		Vistrionix Intel & Tech Solutions VRC Corporation



## FUTURE DEFENSE GROWTH

- Harford County and State of Maryland continue planning coordination for future BRAC or BRAC-like activity
- Expand DefTech Commercialization Office- promote patent opportunities out of APG (now includes Ft Detrick & Ft Meade; headquartered operation in APG community)
- Launch of Advanced Manufacturing, Materials, and Processes (AMMP) Consortium bringing breakthrough science in advanced manufacturing
- Army Futures Command brings Network CFT to APG, a two-star command
- Joint Land Use Study – continued coordination, implementation – Phase II completed August 2019
- Aligned, tech-based mission growth continues outside of BRAC
  - Army Futures Command fed by many aspects of APG
  - Autonomous Vehicle Proving Ground Designation
  - Additive Manufacturing & Materials Processing
  - High Performance Computing/Big Data Analytics
  - Bio, Chemical and Medical mission growth
- Funding for demolition, modernization
- Emerging Threat Center, Innovation Hub, Bio Engineering, and 3D Printing & Prototyping

**“APG is the Army’s  
Home of Innovation”**



# GROWING A KNOWLEDGE ECONOMY



# AMMP

# RAMPMD

THE  
GROUND FLOOR  
AT HARFORD



DEF:::TECH  
MARYLAND  
Defense Technology Commercialization Center



# LOGISTICS MANAGEMENT



- 2.7 million square feet of industrial space currently under construction
- Planned growth – Abingdon Business Park
- Traffic enhancements completed and planned



# HEALTHCARE



- University of Maryland Upper Chesapeake Health's new medical center in Aberdeen is currently under construction. The new free standing medical facility will encompass 240,000 square feet, employ 500 people, and introduce \$75 million in capital investment into the county.
- The Harford Crisis Center is fully operational as of spring 2019 and provides 24-hour behavioral, mental, and addiction health services.
- Lorien Health Services, invested \$7.7 million into expanding their Bel Air location in 2019. The expansion included 34 new assisted living apartments, 48 new beds, and a state-of-the-art rehabilitation facility.



# RETAIL GROWTH

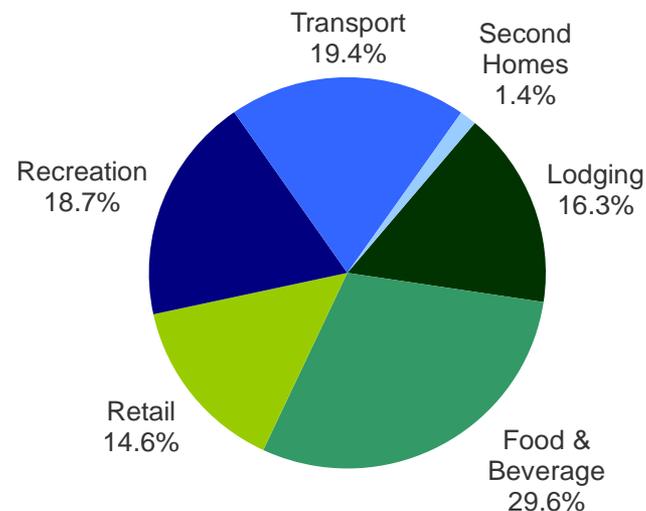


# TOURISM IMPACTS

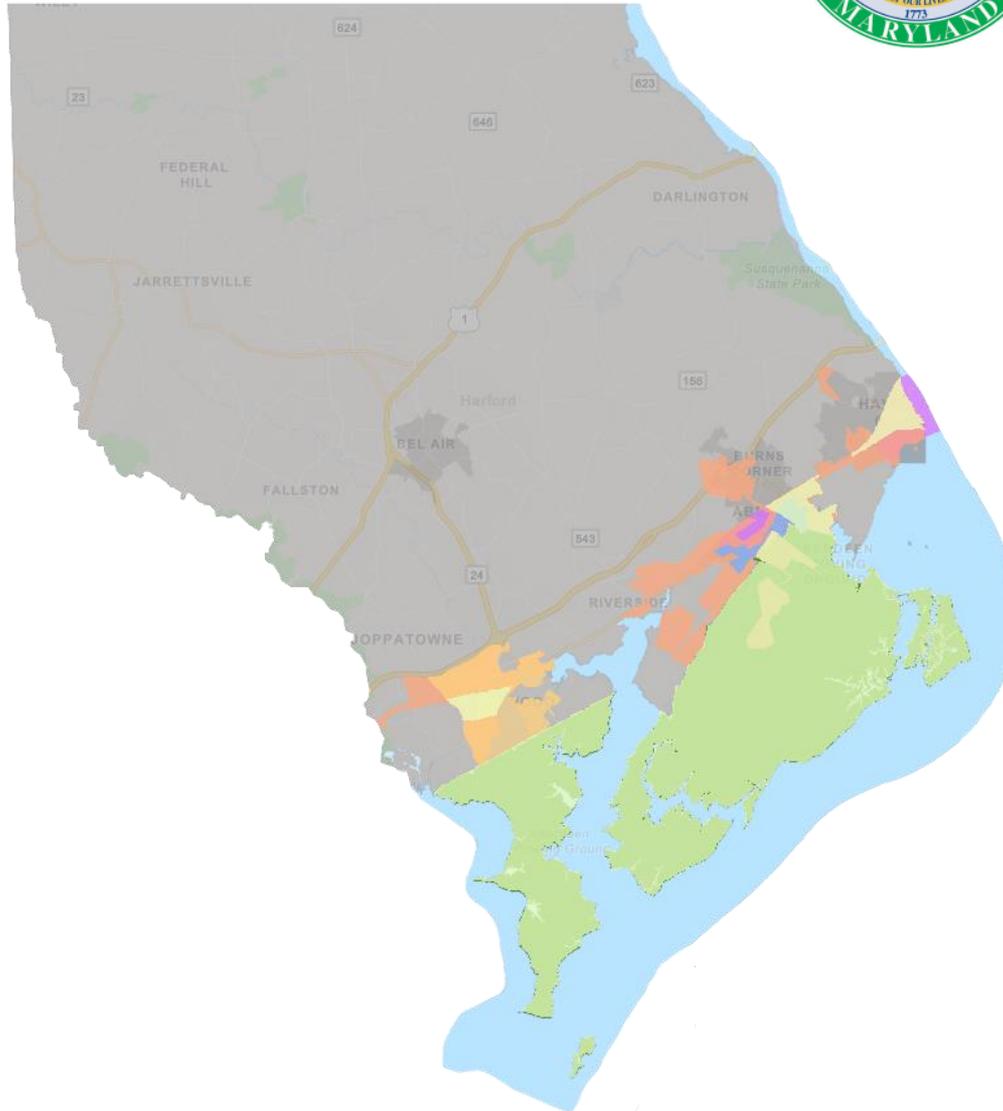


Harford County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2018	\$64.2	\$116.7	\$57.7	\$73.9	\$76.5	\$5.5	\$394.4	5.5%
2017	\$62.7	\$110.0	\$56.0	\$71.3	\$69.0	\$5.0	\$373.9	-0.5%
2016	\$64.7	\$107.1	\$58.5	\$71.1	\$69.5	\$5.0	\$375.9	0.1%
2015	\$62.5	\$104.8	\$60.2	\$67.9	\$75.8	\$4.4	\$375.6	2.3%
2014	\$60.8	\$98.4	\$61.5	\$65.5	\$76.5	\$4.5	\$367.3	12.0%

Tourism industry sales



# BUSINESS INCENTIVE ZONES



- HUBZone
- Sustainable Community Zone
- BRAC Zone
- Enterprise Zones
- Opportunity Zones
- Aberdeen Proving Ground
- County & Municipalities

# BUSINESS DEVELOPMENT TOOLS



## Workforce Development

- FY 2019 – \$100,000 distributed in workforce technical training funds

## Revamped Finance Programs

- Tech Attraction; Entrepreneurial Growth; Revitalization / Façade; Traditional

## Enterprise Zones

- Edgewood/Joppa Enterprise Zone
  - 4,284 acres; \$130 million in capital investment since 2006
- Greater Aberdeen/Havre de Grace Enterprise Zone
  - 9,720 acres; \$300 million capital investment

## BRAC Zones

- New zone in Edgewood, supplements the cost of infrastructure improvements



## Opportunity Zones

- National initiative provides federal tax incentives for underprivileged communities. Harford has four: Edgewood, Aberdeen, (2) Havre de Grace.

## Magnolia Neighborhood Overlay District

- (MNOD) Aids development efforts along Route 40

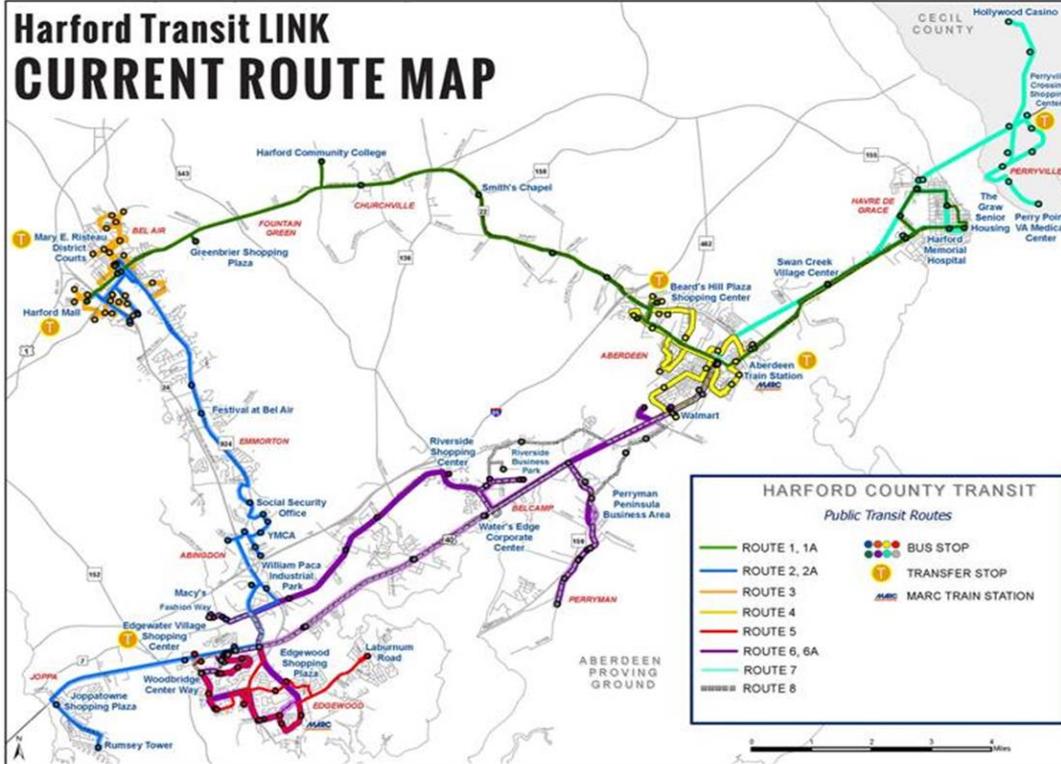
## PACE & SEED Programs

- Financial incentives for clean energy

## Hub Zone Expansion

- Three designated in the county with the addition of Havre de Grace

# HARFORD TRANSIT



## NEW ROUTING, EXTENDED HOURS

Operate 12 fixed route buses Monday – Friday 5:00 AM – 9:00 PM  
 Operate 12 – 14 demand response vehicles for employment, persons w/disabilities and seniors - Monday – Friday 3:30 AM – 9:00 PM

# Buy **LINK**

# Bus Passes On Your Phone

Get the Token Transit App

**Sign Up Now!**

Text "Token" to 41411  
for a download link.

Available on the iPhone

App and the App logo are trademarks of Apple Inc., registered in the U.S. and other countries. Get Link & receive more about Apple Inc., registered in the U.S. and other countries. Google Play logo are trademarks of Google Inc.

BARRY GLASSMAN  
County Executive

## TECHNOLOGY UPGRADES

Token Transit  
 Cameras on all buses  
 Route Shout 2.0

# ACCOLADES



- ❖ The National Association of Counties (NACo) awarded Harford County Government NACo Achievement Awards in 2019:
  - “Best in Category” for **The Sensory Trail at Schucks Regional Park**
  - Community Education Series – **Harford County Mental Health + Safety**
  - **Second Chance Job Fair**
- ❖ Chesapeake Science & Security Corridor named 2018 American Defense Community of the Year
- ❖ Two Harford County companies were named the Regional Manufacturing Institute of Maryland’s (RMI’s) 2018 Champions of Manufacturing: RAMPMD and Worthington Armstrong Venture



*Harford Transit LINK receives 2017 Outstanding Transit System award.*

- ❖ Harford Transit LINK named 2019 Outstanding Transit System by the Transportation Association of Maryland
- ❖ Harford County opened a 24-hour crisis center for behavioral, mental, and addiction health services.

# FAST FACTS



- Harford County has the second highest job growth rate in the state at 2.1%.
- Household median income was \$88,603 in 2018 and expected to be \$90,220 in 2019.
- Unemployment has decreased to 3.1% for September 2019 and is below the state of Maryland (3.4%).

**Since December 2014, more than \$480 million in capital investment, 3,800 jobs, and 5.9 million sq. ft. of industrial, office and commercial space have been added to the Harford County economy.**