



PLANNING BOARD

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Calvin Ball, County Executive

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June 10, 2026

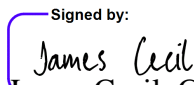
Office of the Secretary
Maryland Department of Planning
Attn: MDP Review
120 E Baltimore Street, Ste 2000
Baltimore, Maryland 21202

RE: Planning Board Recommendation on the Howard County 2025 Development Monitoring System Report

At a Public Hearing held by the Planning Board on June 4th, 2026, the Board heard a presentation by Jeff Bronow, Division Chief, Department of Planning and Zoning, regarding the County's 2025 Development Monitoring System Report. The DMS report tabulates and analyzes recent and current development activity at each stage of the County's land development review and approval process for the current year as well as a five-year history. The report is divided into Residential and Non-Residential sections. A section on Land Preservation is also included. Data is tabulated countywide and by five Planning Areas, which are shown in summary maps.

This report addresses State annual reporting requirements enacted in 2009, known as the Smart, Green and Growing legislation, which require local jurisdictions to report on development activity, comment on consistency with state and local smart growth goals, track defined measures and indicators, and report on APFO restrictions in the County's priority funding area and the resolution of the restrictions, among other measures. A key reporting requirement is an analysis of residential development density that occurred during the last calendar year both inside and outside the County's priority funding area (PFA). Related to this is a discussion on Howard County's growth goals, and how recent development and planning activity is consistent with these goals. In 2024, the Maryland General Assembly enacted a new law requiring local governments with a population over 150,000 to measure and report on residential development plan processing times for all plan types. This information is also reported in Howard County's DMS report.

Sincerely,

Signed by:

James Cecil, Chair
Howard County Planning Board

cc: Opal Jones, Chair
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Director, Planning & Zoning



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

May 2026

Development Monitoring System Report

Date Issued:

May 2026

Reporting Period:

January 1, 2025 to December 31, 2025
With countywide summaries from 2021

Produced by:

Howard County Department of Planning and Zoning
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Executive Summary

Adequate Public Facilities Act

In response to the *1990 General Plan*, the Adequate Public Facilities Act of 1992, expressed “the need to provide a growth management process that will enable the County to provide adequate roads, schools, and other facilities in a timely manner and achieve General Plan growth objectives and to provide information to other agencies of the County and State, as well as to the public, so that they can plan accordingly. This process is designed to provide predictability to all parties and to direct growth to areas where adequate infrastructure exists or will exist.”

Section 16.1108 of the Adequate Facilities Act directs that “The Department of Planning and Zoning shall monitor the growth of housing and employment in Howard County and shall issue reports which indicate:

- a. Subdivision plans and site development plans approved during the last several years, including the number of residences or the number of new employees projected for the approved subdivisions and land developments.
- b. Subdivision plans and site development plans in process at the time of the report, including the number of housing unit allocations or the number of new employees projected for the proposed subdivisions and land developments.
- c. Building permits and certificate of occupancy issued during the last several years, indicating the number of dwelling units and the projected number of new employees for which building permits or certificates of occupancy were issued.”

Adoption of the Adequate Public Facilities Act (commonly known as APFO) in 1992 has allowed the County to effectively manage the amount and distribution of residential growth in accordance with growth policy set by the General Plan. Prior to adoption of APFO, the County was averaging more than 3,000 new houses per year. This rate has been reduced by about half since the adoption of the *2000 General Plan*, which established the annual number of housing unit allocations for new homes that can move through the development process. The allocations chart in the latest adopted General Plan, *HoCo By Design*, continues to manage residential growth in the County at a predictable annual rate.

Also part of APFO is the School Capacity Test, which limits construction in areas of the County facing school overcrowding, and the adequate roads test which determines necessary road improvements. In addition, excise taxes on new construction fund road and school capacity needs to keep pace with new growth.

APFO has been effective in phasing growth, either through “forced phasing” due to restricted numbers of allocations allowed each year, or developer planned phasing prompted in part by APFO allocation limits. Known phasing of subdivisions coupled with growth controls helps in planning for future infrastructure needs and provides for the timely construction of schools, roads, and other public infrastructure.

Development Monitoring System Report (DMS)

As required by APFO, this Development Monitoring System report tabulates and analyzes recent and current development activity at each stage of the County’s land development review and approval process. These stages include subdivision plans, site development plans, building construction permits and use and occupancy permits. Both approved and currently in-process plans are tabulated. Current year as well as a five-year history are discussed. The report is divided into Residential and Non-Residential sections. A section on Land Preservation is also included. Data are tabulated countywide and also by five Planning Areas, which are shown in summary maps.

Development activity in Downtown Columbia is also included in the DMS report given that the implementation of the Downtown Columbia Plan is currently in process.

Additional Reporting Requirements

Amendments to State law enacted in 2009, known collectively as the Smart, Green and Growing legislation, require that local jurisdictions report on development activity, comment on consistency with state and local smart growth goals, track defined measures and indicators, and report on APFO restrictions in priority funding areas and the resolution of the restrictions.

The reports are due in July covering development activity for the previous calendar year. The required information includes smart growth measures and indicators, planning-related regulatory amendments, and new General Plan elements and amendments. Newly built infrastructure is also reported on. This is followed by a discussion on whether these changes are consistent with Howard County’s General Plan and other policies.

Another key reporting requirement is an analysis of residential development density that occurred during the last calendar year both inside and outside the County’s priority funding area (PFA). Related to this is a discussion on Howard County’s growth goals, and how recent development and planning activity is consistent with these goals. This is followed by a discussion on current APFO restrictions in Howard County and recent amendments to APFO. This section concludes with a summary of lot densities for housing units constructed in 2025.

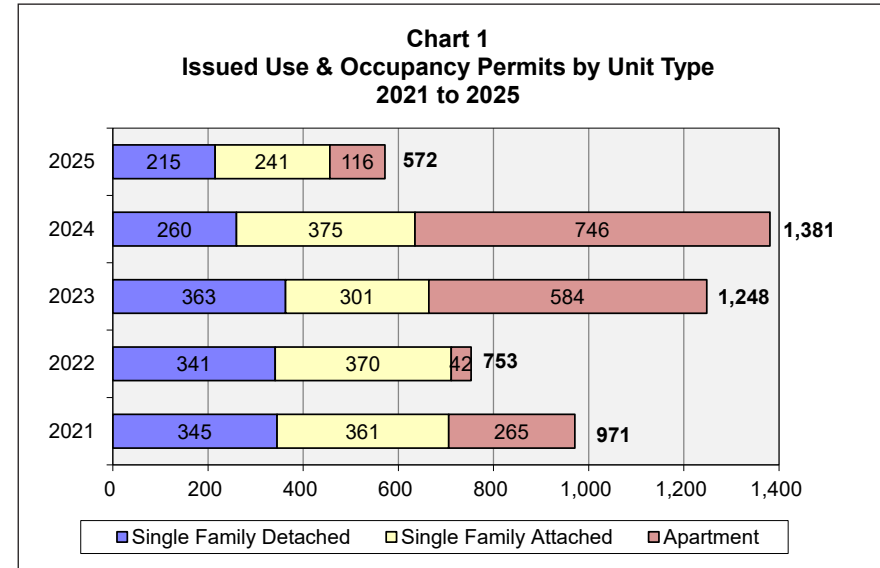
In 2024, the Maryland General Assembly enacted a new law requiring local governments with a population over 150,000 to measure and report on residential development plan processing times for all plan types. This reporting is due by July 1 of each year for the previous calendar year. This is the second time this information is reported in Howard County’s DMS report.

This DMS report includes these additional reporting requirements and serves to satisfy the annual State reporting mandates, enabling a better understanding of Howard County’s land development issues, policies and goals.

Residential Development

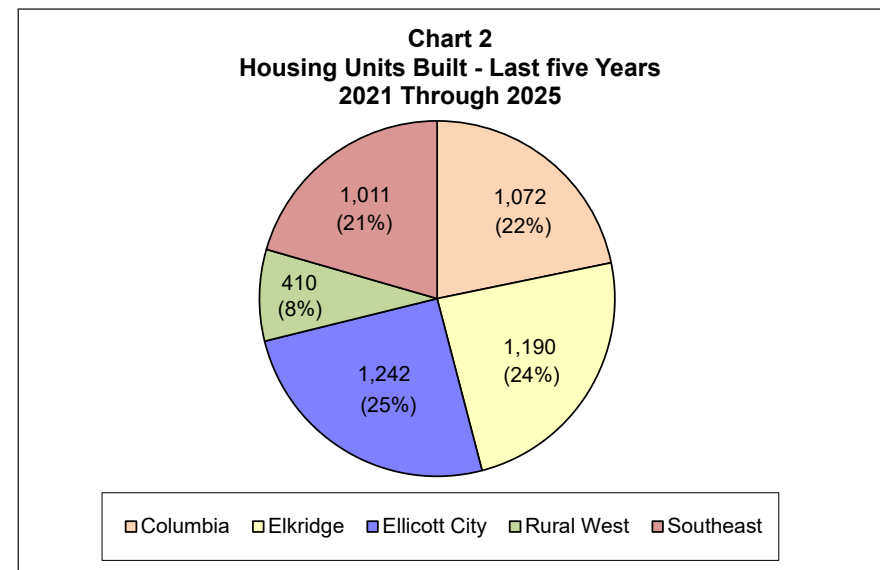
Housing Units Built in 2025

- During the latest reporting period, from January through December 2025, 572 housing units were built. This is a significant decrease from the previous reporting period when 1,381 units were built, and the smallest number built over the last five years (Chart 1).
- Of the 572 completed units last year, 38% were single family detached units, 42% were townhouse units and 20% were apartment units. Greater percentages of apartment units are likely to be built in future years given the zoning of the remaining undeveloped land in the County as well as higher density redevelopment initiatives.
- Last year, 40% of all units were completed in Ellicott City, 33% in the Southeast, 15% in Columbia, 11% in the Rural West, and 1% in Elkridge. Map 1 shows the these Planning Areas of the County and the details of where the new housing units were built in 2025.

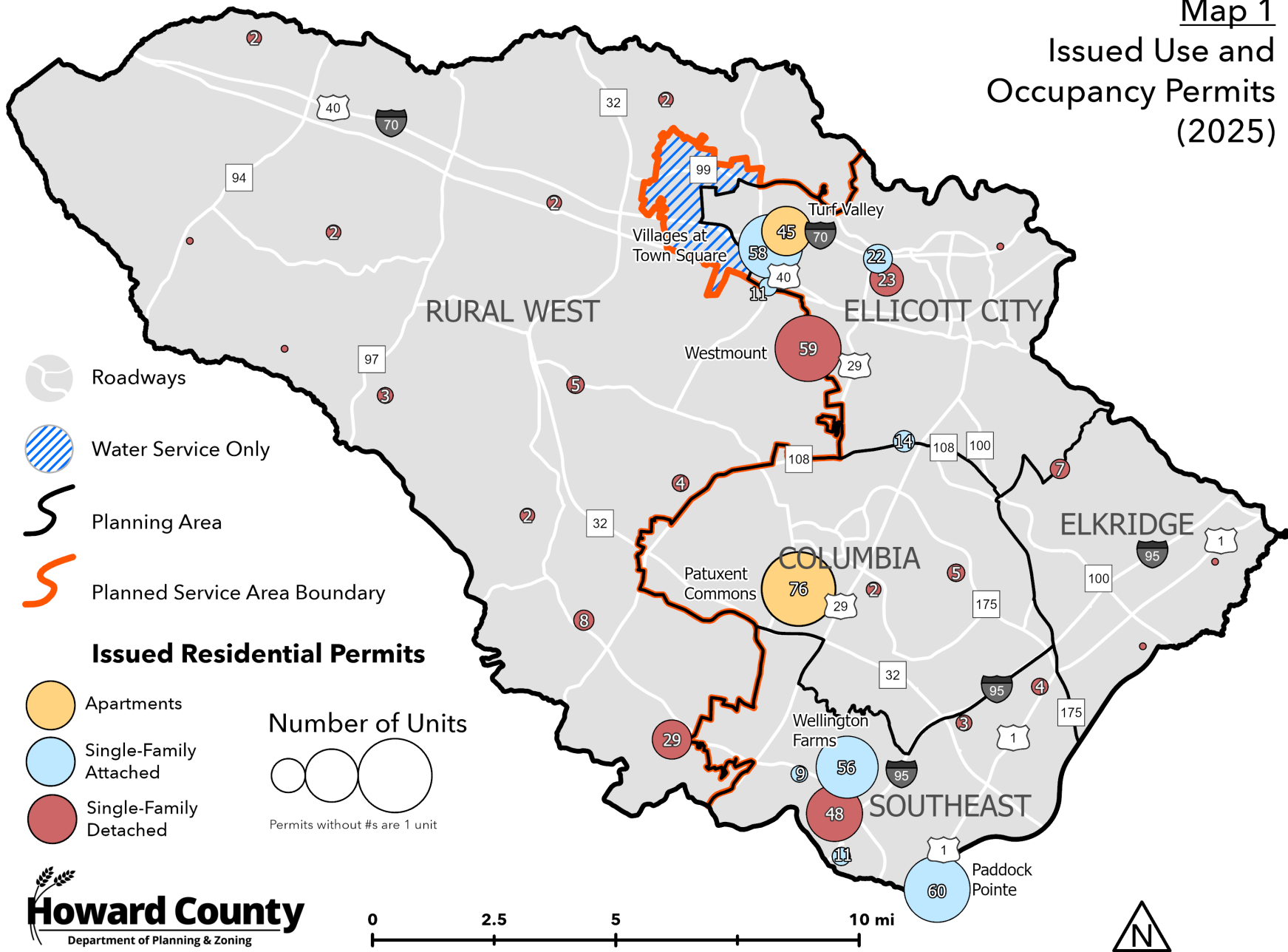


Housing Units Built - Last Five Years

- Over the last five years, a total of 4,925 housing units were built, an average of 985 new units per year. About 31% of these have been single family detached units, 33% single family attached or townhouse units, and 36% apartment units (Chart 1).
- Over the last five years, 25% of all units were completed in Ellicott City, 24% in Columbia, 22% in the Southeast, 21% in the Rural West, and 8% in the Rural West (Chart 2).

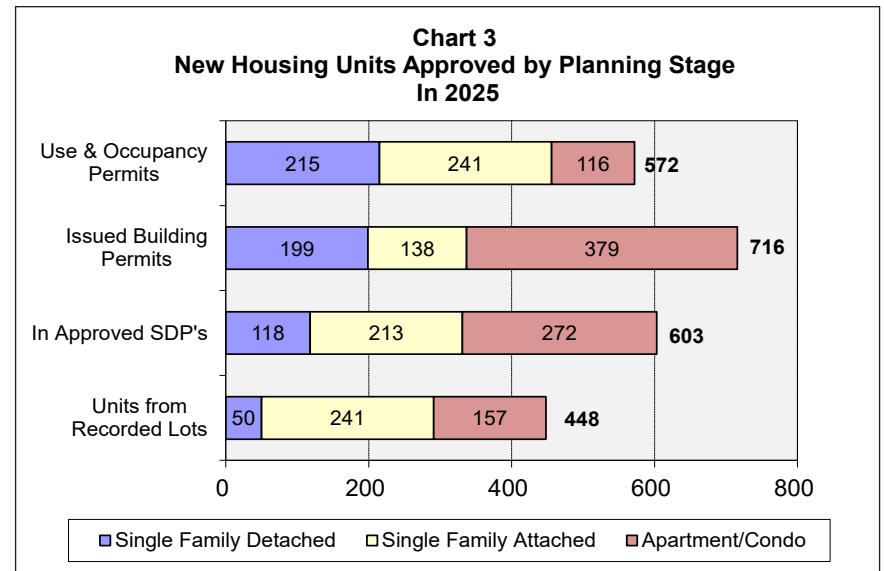


Map 1 Issued Use and Occupancy Permits (2025)



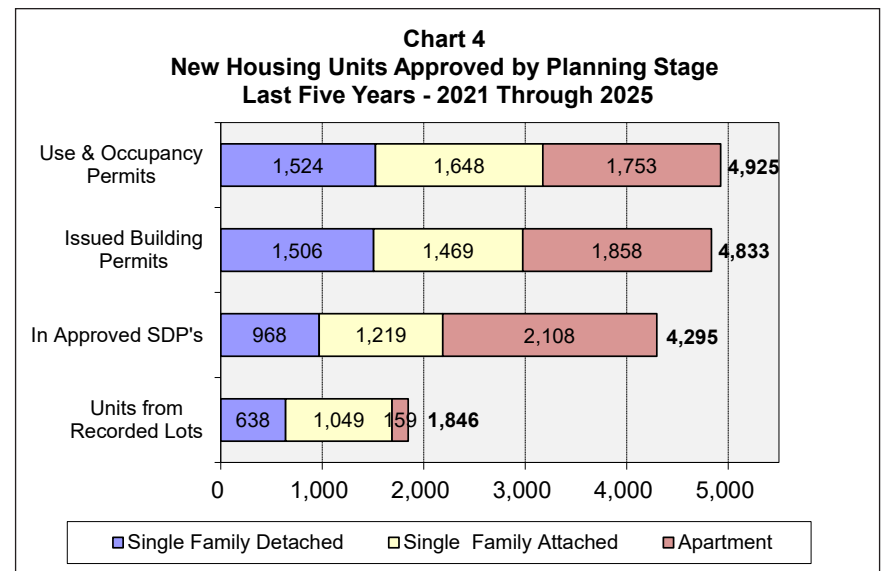
Housing Units Approved in 2025

- There were 716 building permits issued (housing starts) during 2025 (Chart 3). This is 20% less than the 891 permits issued in 2024. It can take anywhere from a few months to more than a year to complete construction after a residential building permit has been issued.
- In 2025, there was potential for 603 units approved in site development plans and 448 housing units from recorded lots and (Chart 3).



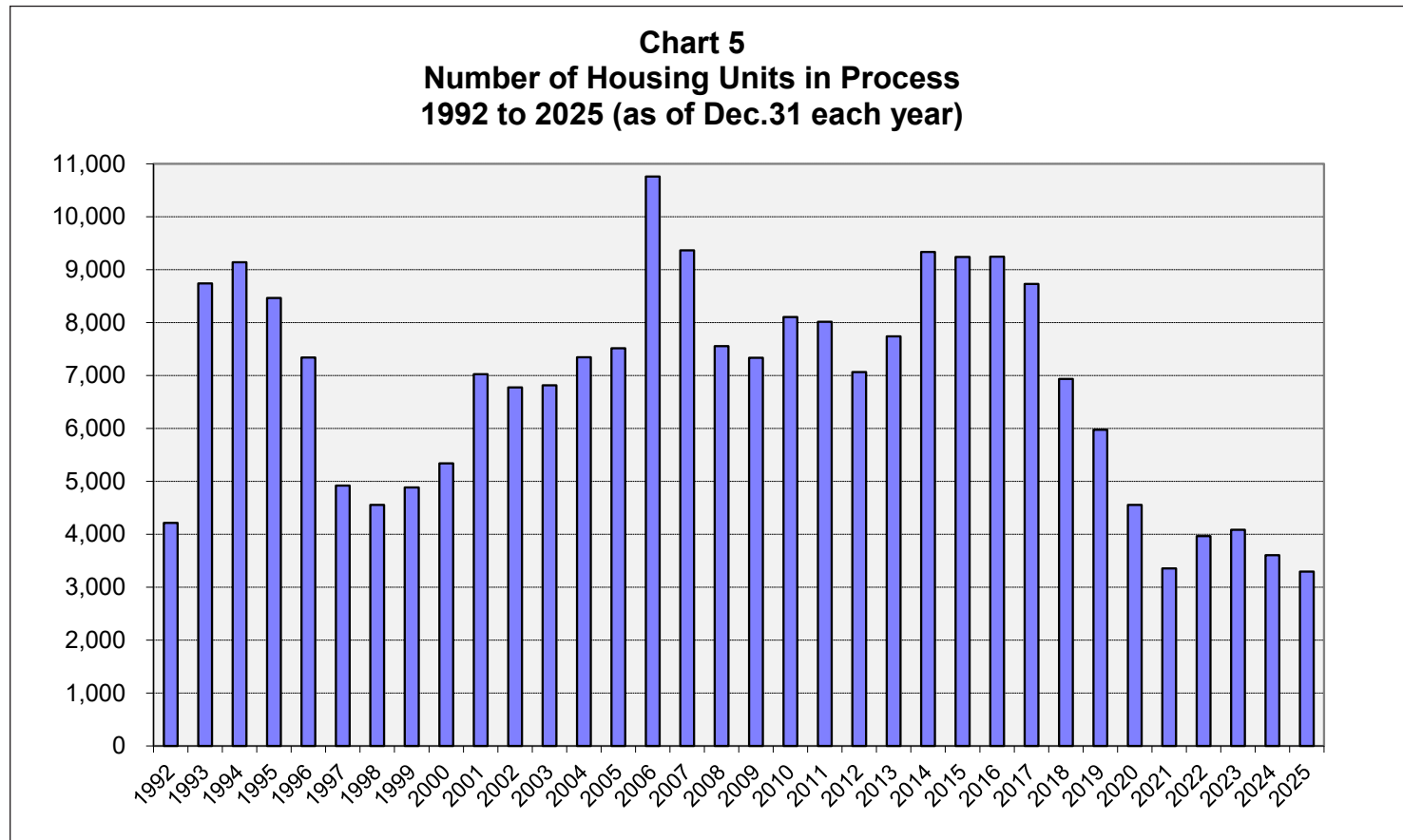
Housing Units Approved - Last Five Years

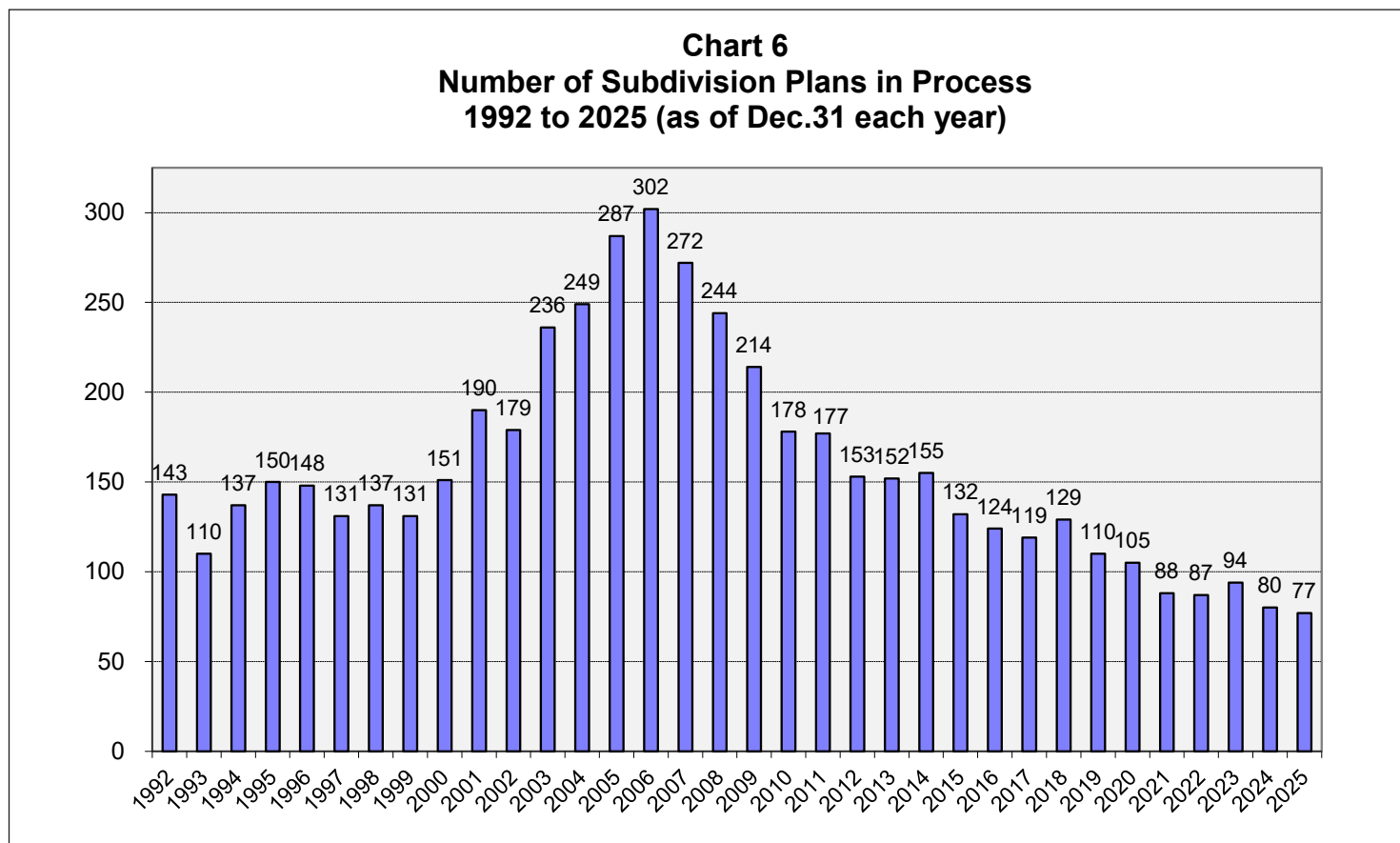
- Over the last five years, a total of 4,833 building permits were issued for new housing units, an average of 967 new units per year. There were 4,833 housing units approved in site development plans and 1,846 units approved in recorded subdivision plans (Chart 4).
- Over the last five years, about 31% of all issued building permits have been for single family detached units, 30% for single family attached or townhouse units, and 38% for new apartment units.
- The number of housing units to be built over the next several years is expected to slow given the reduced number of units approved in site development plans and recorded in subdivisions in recent years (Chart 4).



Housing Units Under Subdivision Review

- As of December 31, 2025, there were 3,297 units in the subdivision process. This represents all units in plans under review prior to being recorded and approved in site development plans. This compares to 3,606 units in process for the prior reporting period (December 31, 2024).
- The number of units in subdivision plans under review has declined over the last ten years as vacant land has become more scarce in the County. Last year, with 3,297 units under review, was the lowest since APFO began in 1992 (Chart 5).
- The number of subdivision plans under review in DPZ has also been declining and is at the lowest level since 1992 with 77 plans under review as of December 31, 2025 (Chart 6).
- A significant number of the in-process units as of the end of last year, 1,418 or 43% of the total 3,297, are included in future phases of phased projects with development planned as far out as 2032. The larger phased plans include Erickson-Oxford Hills in Columbia and Turf Valley in Ellicott City.
- Countywide, 9% of the units in process on December 31, 2025, were single family detached units. About 8% were single family attached units and another 83% were apartment units (including both condo and rental).





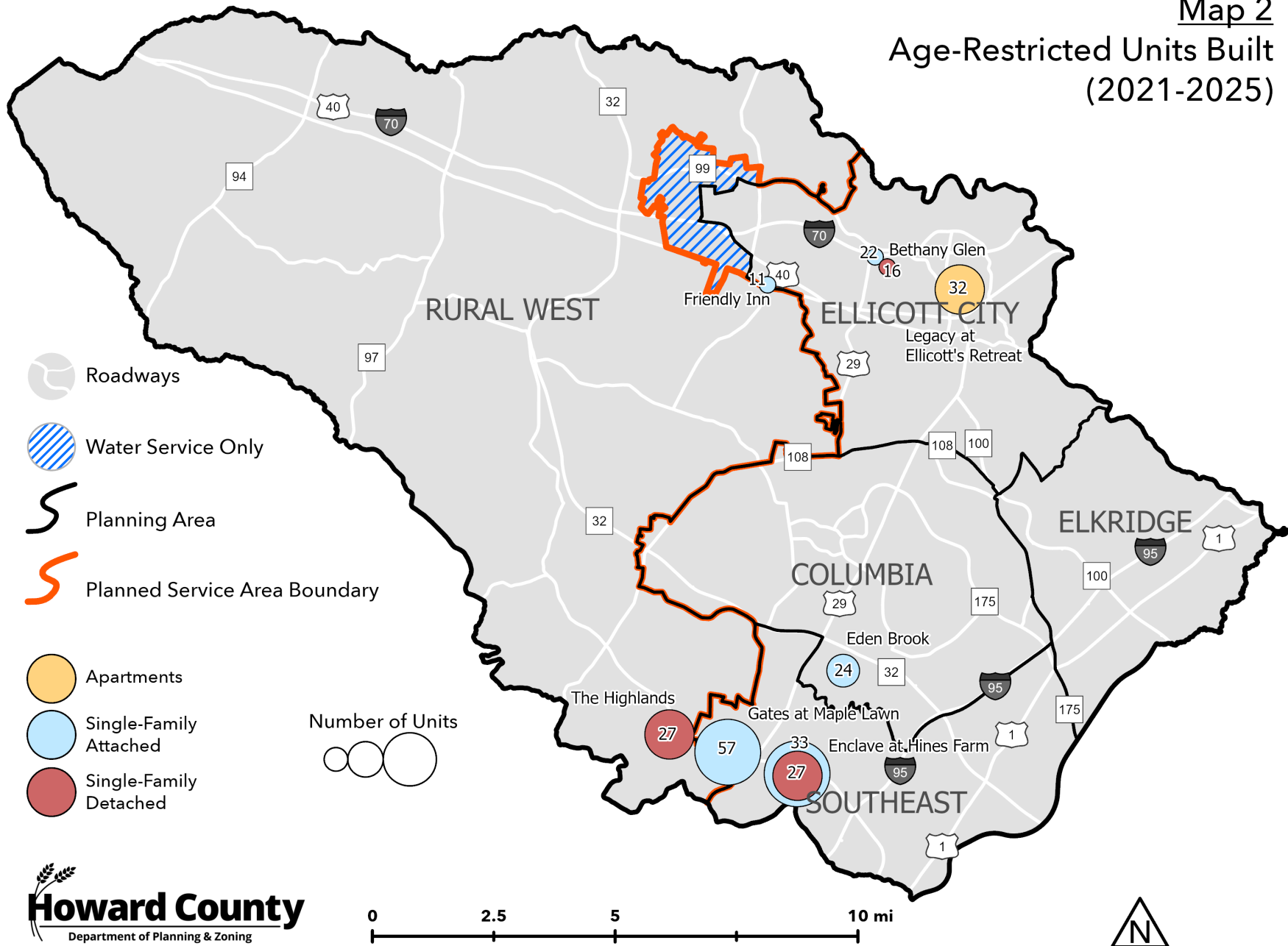
Age-Restricted Units

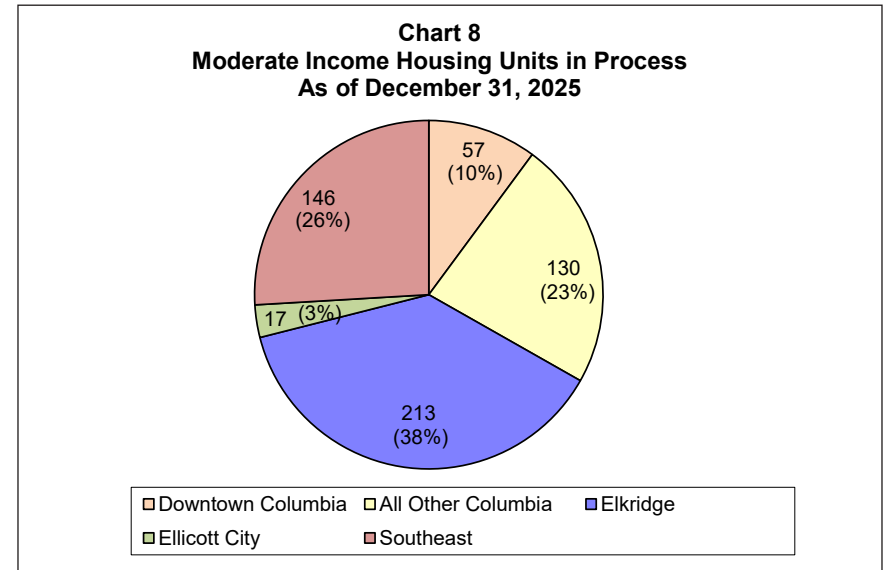
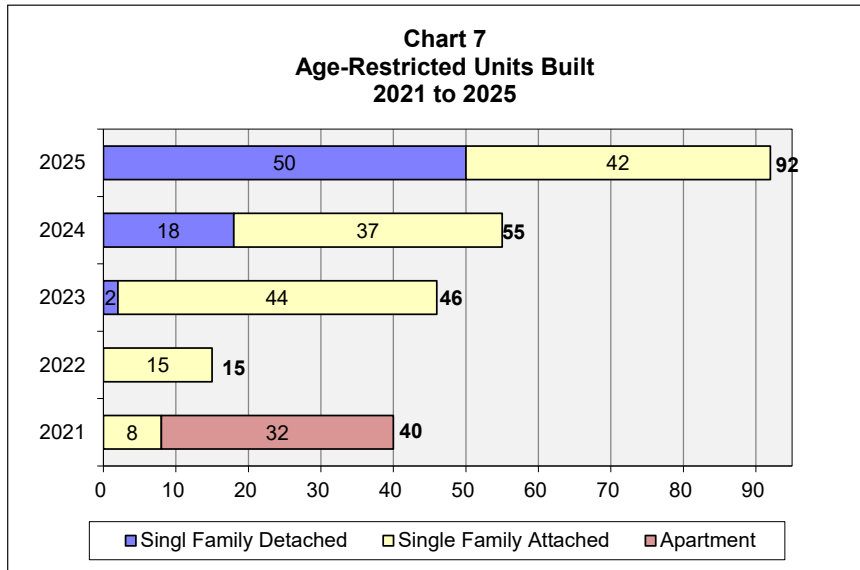
- There were 92 age-restricted housing units built in 2025, 16% of the 572 total housing units built in the County. Fifty of these age-restricted units were single family detached units and 42 were townhomes. For the year prior in 2024, 18 age-restricted single family detached homes and 37 age-restricted townhomes were built (Chart 7).
- As of December 31, 2025, there were 1,589 age-restricted units in the planning process. This includes 1,200 apartment units in the planned Erickson development known as Oxford Hills, 44 apartment units as part of Elms at Elkridge, 161 townhome units in the Halcyon at Taylor Highlands development, 95 apartment units at 5497 Waterloo Road, 13 single family

detached units and 50 townhomes units at Rockland Terrace, and 26 townhomes at Daniels Mill Overlook. For the previous reporting period there were 1,611 age-restricted units in the subdivision process.

- The 2005 DMS was the first time age-restricted units were reported. This was soon after the time the County had adopted regulatory changes enabling more of these types of units. In the last 21 years, 14% of all new homes built in Howard County have been age-restricted. Over the last five years 5% or one out of every 20 homes built have been age-restricted (Chart 7 and Map 2).

Map 2
Age-Restricted Units Built
(2021-2025)



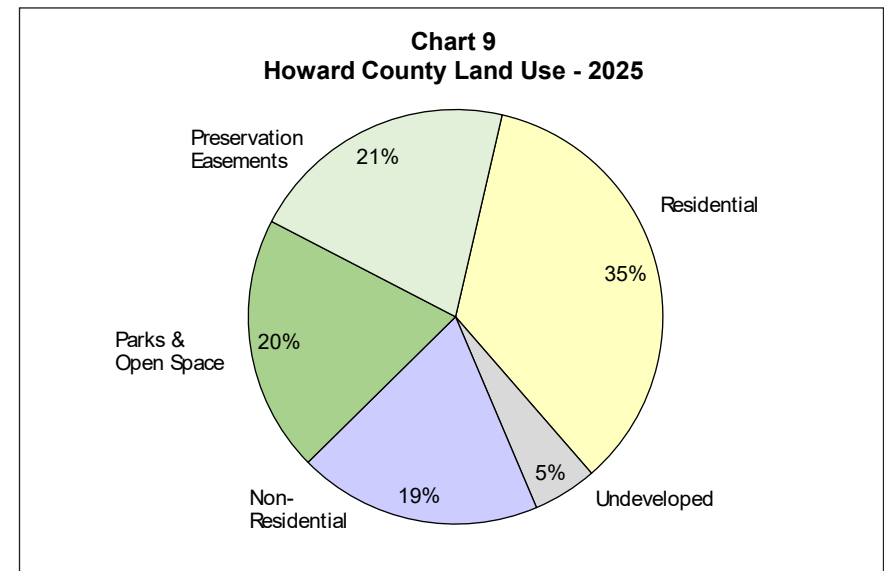


Moderate Income Housing Units (MIHU)

- During 2025 there were 17 MIHU’s in approved plans—4 townhouse units and 13 apartment units. This is less than the 103 approved MIHU’s during the previous reporting period.
- As of December 31, 2025, there were 563 MIHU’s in process—1 single family detached unit, 80 townhomes and 482 apartment units. About 38% of the units are in Elkridge, 26% in the Southeast, 23% in non-Downtown Columbia, 10% in Downtown Columbia, and 3% in Ellicott City. There were 542 MIHU units in process the previous reporting period (Chart 8).

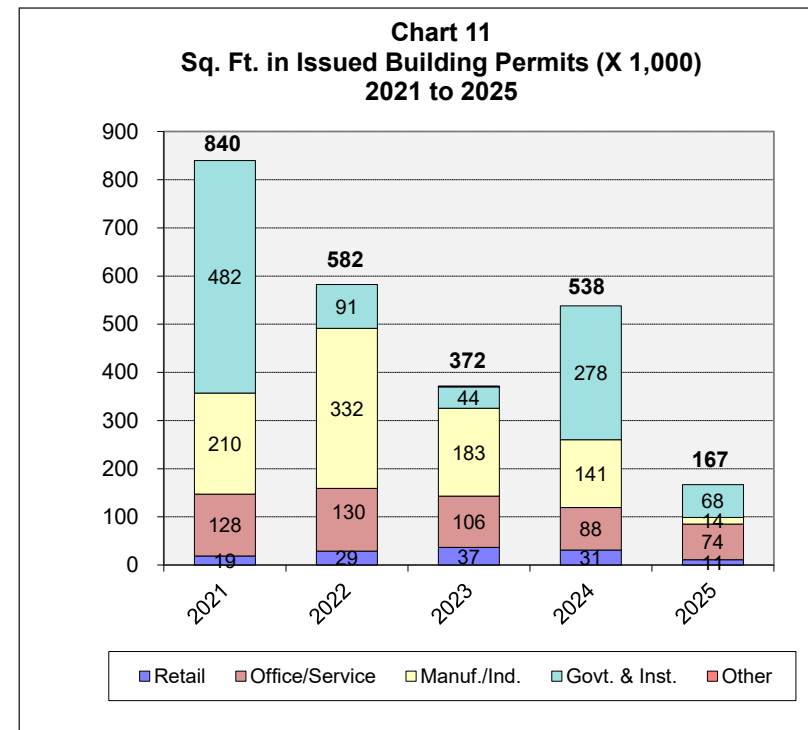
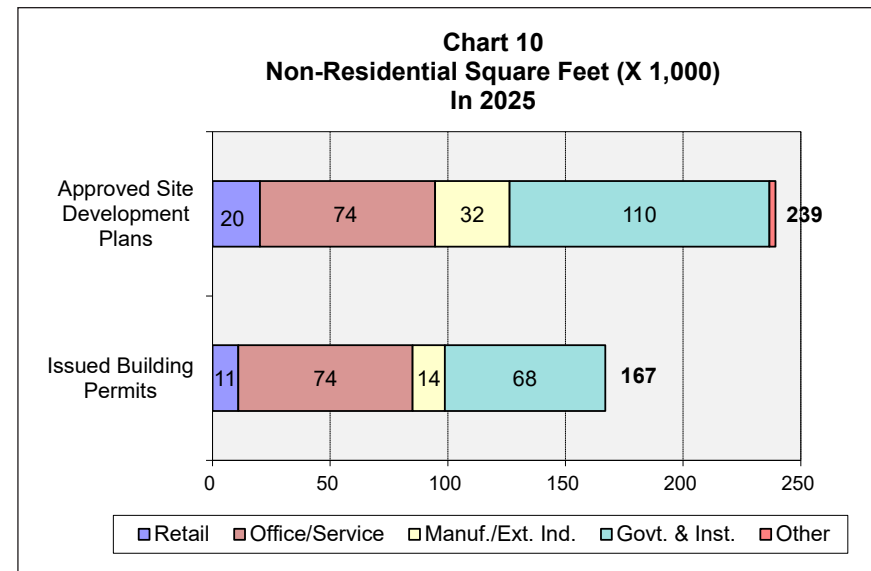
Land Preservation

- In 2025, 46 acres of new parks and open space land were acquired. The greatest amount, 21 acres, was added in Ellicott City as part of the Crested View at Taylor Highlands subdivision. An additional 247 acres of land were permanently preserved as environmental and agricultural easements, most of which in the Rural West.
- Total preserved agricultural and environmental easements and parks and open space land amount to 66,055 acres, about 41% of the total 162,000 acres of land in Howard County (Chart 7).



Non-Residential Development

- In 2025, about 239,000 square feet of building space were approved in site development plans. Building permits were issued for 167,000 square feet. (Chart 10).
- As shown in Chart 11 there was a significant decrease in the square footage of issued building permits last year, from 538,000 square feet issued in 2024 to 167,000 square feet issued in 2025, which was the lowest amount in the last five years.
- About 44% of the new building space constructed last year was located in Columbia, 41% in the Southeast, 9% in the Rural West, 4% in Ellicott City, 2% in Elkridge, and 1% in Downtown Columbia.
- About 49% of the new building space approved in site development plans last year was located in the Southeast, 47% in the Southeast, and 5% in Ellicott City. There was no approved space last year in the Rural West or Elkridge.
- Over the last five years, there was an annual average of about 406,000 square feet in approved non-residential site development plans and 500,000 square feet in issued non-residential building permits.
- Over the last five years, 50% of non-residential construction was built in the Southeast, 33% in Columbia, 11% in Elkridge, 4% in Ellicott City, and 2% in the Rural West.
- Over the last five years, 39% of non-residential construction was for government and institutional space, 35% for manufacturing/extensive industrial space, 21% for office space, and 5% for retail space.
- As of December 31, 2025, there were a little more than 1.7 square feet of building space under plan review in non-residential site development plans. This is significantly more than the 430,000 square feet under review the previous year.
- According to the Maryland Department of Labor, Howard County lost 615 jobs last year (1st quarter 2024 to 1st quarter 2025 estimates). The total number of jobs in Howard County as of the 1st quarter 2025 was 171,013.



Smart Growth Information

Smart, Green and Growing Legislation

This section of the DMS report has been produced to satisfy amendments to State law enacted in 2009 and 2013, known collectively as the Smart, Green and Growing legislation. All jurisdictions in Maryland are required to report on development activity, comment on consistency with state and local smart growth goals, track defined measures and indicators, and report on APFO restrictions in priority funding areas and the resolution of the restrictions. These reports are due in July covering development activity for the previous calendar year.

This section summarizes planning-related regulatory activity including zoning map and text amendments, subdivision and land development regulation amendments, and new General Plan elements and amendments. Newly built infrastructure is also reported on, including new roads and other major transportation facilities, major water and sewer facilities, and new schools and school additions. A discussion on whether these changes are consistent with Howard County's General Plan follows.

Another key reporting requirement is residential development density that occurred during the last calendar year both inside and outside the County's Priority Funding Area (PFA). Related to this is a discussion on Howard County's growth goals and how recent development and planning activity is consistent with these goals.

In 2024, the Maryland General Assembly enacted a new law requiring local governments with a population over 150,000 to measure and report on residential development plan processing times for all plan types. This reporting is due by July 1 of each year for the previous calendar year. This is the second time this information is reported in Howard County's DMS report and is included further below.

Regulatory Activity

General Plan Amendments and Related Legislation in Support of the General Plan

The following highlights General Plan amendments and other adopted legislation in 2025 in support of the General Plan.

CB 3-2025 — U.S. Department of Housing and Urban Development Loan Guarantee Assistance Funding

This bill approves a multi-year Contract and related loan documents between Howard County, Maryland and U.S. Department of Housing and Urban Development for Section 108 Loan Guarantee Assistance funding to support the creation and preservation of affordable housing units in two redevelopment projects with Enterprise Community Development, Inc. in Columbia, Maryland.

CB 44-2025 — Agricultural Land Preservation Reauthorization

This bill authorizes and empowers Howard County to enter into installment purchase agreements to acquire development rights in agricultural lands located within the County for an aggregate purchase price of not more than for \$16,947,400, plus interest, for purposes of agricultural land preservation.

CB 46-2025 — Route 1 Tax Credits

This bill reestablishes a tax credit against the County tax imposed on certain commercial or industrial real property located adjacent to Route 1 that is renovated, upgraded, or rehabilitated, under certain conditions for the purposes of Route 1 revitalization.

CB 53-2025 — Agricultural Land Preservation

This bill provides for a multi-year Installment Purchase Agreement by Howard County to acquire development rights on approximately 66.7 acres of agricultural land located on the west side of Long Corner Road in Woodbine for a maximum purchase price of \$2,307,900.

CB 60-2025 — Property Tax Credit for Seniors

This bill amends the Property Tax Credit for Seniors in order to amend certain eligibility requirements and amends the Credit for seniors and retired military in to increase the duration of the tax credit to 10 years.

CB 66-2025 — Gateway Master Plan

This bill amends HoCo By Design to include the Gateway Master Plan and recognizing that the Plan is a comprehensive, long-range redevelopment vision for the future of Gateway, an area comprising approximately 1,100 acres of commercial and industrial properties.

CR 167-2025 — Payment in Lieu of Taxes for Solar Array

This resolution approves the terms and conditions of a Payment in Lieu of Taxes Agreement by and among Howard County and the facility and property owners for the construction and operation of a solar array located at 3855 Manor Lane in Ellicott City.

CR 169-2025 — Easement for EV Charging at the Elkridge Library

This resolution authorizes the County Executive to grant an easement containing approximately 3,600 square feet to Baltimore Gas and Electric Company so that BGE may extend electric service to new EV charging facilities at the Elkridge Library.

CR 185-2025 — Payment in Lieu of Taxes Agreement for Affordable Housing

This resolution approves the terms and conditions of a Payment in Lieu of Taxes Agreement and extension request by and between the Howard County, Maryland and Orchard Club, LLLP for an existing 196-unit housing community located at 6330 Orchard Club Drive, Elkridge, Maryland, which serves mixed income residents.

Subdivision & Land Development Regulation Amendments (and related)

The following highlights amendments to the Subdivision & Land Development Regulations (and other related land use code amendments) that were approved in Howard County in 2025.

CB 18-2025 — Transit Oriented Development Districts (TOD) Residential Unit Exemptions

This bill amends the definition of Moderate Income Housing Units, establishing the School Surcharge rate at time of submittal of sketch plan,

provides for a Payment in Lieu of Taxes for Disability Income Housing Units within a Transit Oriented Development (TOD), and exempts Transit Oriented Development (TOD) residential units from the Adequate Public Facilities Ordinance School Capacity Test under certain conditions.

CR 113-2025— School Capacity Chart

This resolution adopts the School Capacity Chart for Fiscal Year 2026 pursuant to the Adequate Public Facilities Act of Howard County, designating which school districts are open and which are closed to development and requires a certain joint special work meeting in accordance with Section 16.1103(d) of the Howard County Code.

CR 114-2025 — Housing Unit Allocation Chart

This resolution adopts the Housing Unit Allocation Chart for Fiscal Year 2026 pursuant to the Adequate Public Facilities Act of Howard County.

Zoning Regulation Amendments (and related)

The following highlights all zoning regulation and related amendments that were approved in Howard County in 2025.

CB 55-2025 — Age Restricted Adult Housing and Affordable Housing Amendments

This bill amends the Howard County Zoning Regulations to allow Age Restricted Adult Housing as a permitted use in the Planned Employment Center (PEC) zoning district, with additional requirements and amends the Moderate-Income Housing Unit (MIHU) requirements for Age-Restricted Units in the R-SI, POR, CCT, CEF and PSC zoning districts to require at least 5% Low-Income Housing Units (LIHU) or Disability Income Housing Units (DIHU).

CB 68-2025 — Nursing Homes & Residential Care Facilities

This bill amends the Howard County Zoning Regulations to add additional Conditional Use criteria for Nursing Homes and Residential Care Facilities that allow for reduced setbacks in certain circumstances and generally related to Nursing Homes and Residential Care Facilities.

CB 74-2025 — Amending Agricultural Land Uses in Howard County

This bill amends the Howard County Zoning Regulations in accordance with HoCo By Design to add certain definitions related to agricultural, farming and farm alcohol producer uses, amends requirements for an Agritourism Special Farm Permit and to add a new small-scale Agritourism Use, adds Incidental Outdoor Stays as a Special Farm Permit use, amends Bed and Breakfast Inn use on Agricultural Land Preservation Program properties and allow under Special Farm Permit, amends uses and certain restrictions for Agricultural Land Preservation Program properties, amends Limited Social Assembly use and renamed to Rural Venue Space, amends the Farm Winery and Brewery use to Farm Alcohol Producer, and makes certain technical corrections.

Zoning Map Amendments

There were no zoning map amendments approved in Howard County in 2025.

Major Infrastructure

New Roads and Changes to Roads

In 2025, 5.04 miles of new or extended roadway were constructed in Howard County. These road additions were built in 10 new and existing subdivisions as part of developer's agreements executed with the County and other planned improvements. Detailed information about all roadway construction projects is documented in Howard County's 2025 annual report to the State Highway Administration. The road additions are all shown on Map 1.

School Additions and Renovations

The Howard County Public School System (HCPSS) had several projects underway in 2025. Renovation and expansion efforts continue to be concentrated within the priority funding area. These are described below and also shown in Map 3.

Applications and Research Laboratory (ARL)

The first phase of the ARL renovation project, replacing exterior walls and renovating interior spaces, began in 2025 and is expected to be completed in early 2026. Additional interior renovations will be completed later in 2026, and further exterior work will continue through 2028. Once complete, ARL will have reconfigured classroom spaces to support additional programming and updates to many building systems.

Oakland Mills Middle School Renovation/Addition

This project has received all approvals and will begin construction in early 2026. The full renovation will upgrade building systems and address several educational sufficiency concerns. The phased construction project will continue through 2029, with scheduled completion in September of 2029.

Faulkner Ridge Center

This renovation project will convert the closed elementary school into a regional center for early childhood education. Final approvals have been received and construction will begin in early 2026. Last used as a school facility in the early 1980s, the renewed facility is planned to have 13 classrooms to support program expansions for pre-kindergarten students. Completion is expected in 2027.

Projects in Planning and Design

Planning and design work continued on the Dunloggin Middle School renovation and addition project. Construction is expected to begin in 2027 to replace mechanical systems and modernize classroom spaces. Expected completion is September 2030.

Systemic Renovations

Planning work was underway in 2025 for HVAC replacements at St. John's Lane Elementary School and Lime Kiln Middle School. Construction is expected to begin in summer 2026. A Phased replacement of the HVAC system at Mayfield Woods Middle School is ongoing with the final phase planned for summer 2026. Entrance renovation projects to improve security at schools are ongoing.

Other Major Community Facilities and Infrastructure (valued at \$1 million or more)

In 2025, construction was completed on a new 2.5 million gallon elevated water tank in Guilford at a total cost of approximately \$7.7 million. This tank will provide water storage and service to the southeast area of Howard County (the elevation 400 water zone).

Associated with the new water tank at Guilford, Ridgely's Run Road was completed at a cost of \$3.2 million, including all grading, storm water management and sediment control. This road also serves the recently constructed Guilford High School.

Another capital project for the rehabilitation and replacement of an existing 8" water main on Old Columbia Pike was completed in 2025 at cost of close to \$3.0 million.

A \$2.2 million capital project for a bridge replacement on Daisy Road over Little Cattail Creek was completed in 2025.

An octagonal fishing pier and walkway were replaced at a pond in the Sewell's Orchard subdivision at a total cost of \$1.25 million.

Interior alterations to the County-owned building on Stanford Blvd. were completed for the Health Department at a cost of \$1 million.

A waterway stabilization project on the Little Patuxent River at Woodland Road was completed in 2025 at a cost of \$1 million.

And another \$1 million was spent at the end of Montgomery Run Road for the repair of an existing stormwater management pond.

The locations of these capital improvement projects are shown on Map 3.

Transit Improvements

In 2025, 61 bus stops were improved at a total capital cost of \$129,710. There are currently 457 bus stops throughout Howard County. The bus stop improvements are shown in Map 1.

In addition, 7 new medium-duty Gillig transit buses have been ordered for the County's RTA system at a total cost of \$4,091,766.. It is anticipated these vehicles will be delivered in the fall of 2026. Four more medium-duty Gillig transit buses and one cutaway style bus will be ordered in FY 26 and will be delivered late in FY 27.

Consistency

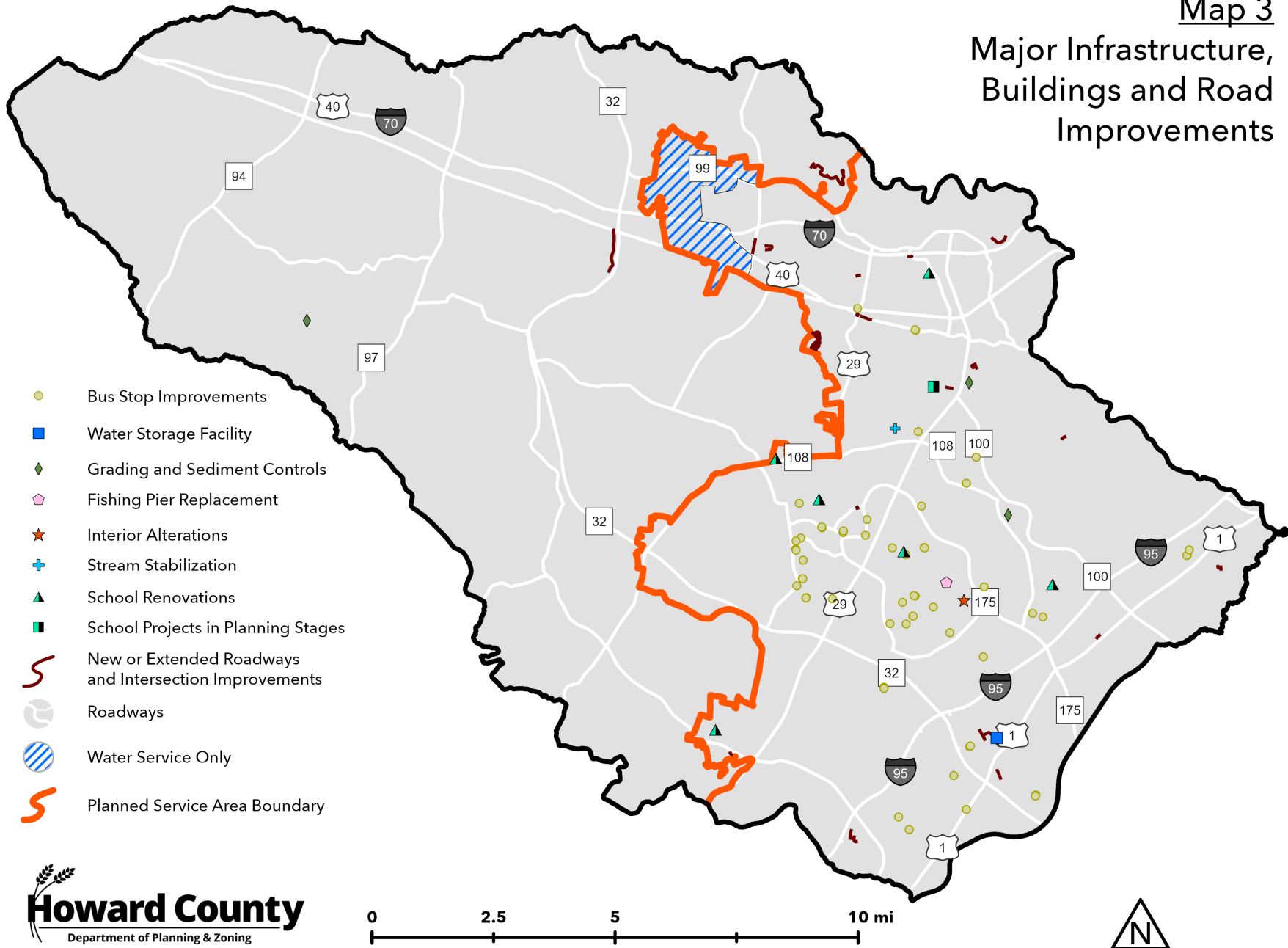
The Smart, Green and Growing Legislation requires that development patterns and infrastructure improvements that have occurred over the last year be evaluated for consistency with adopted local plans. An evaluation of whether these changes are consistent with each other as well as the adopted plans of adjoining jurisdictions is also required.

Overall, private development, new infrastructure and subdivision and zoning regulatory amendments that took place in Howard County last year are consistent with our local plans—most importantly the County's General Plan known as *HoCo By Design*—as well as with each other and the adopted plans of adjoining jurisdictions.

Howard County's growth policy is to concentrate higher density development in the eastern portion of the County while preserving the Rural West. The development patterns and regulatory initiatives summarized in this report continue to support this goal.

For example, most all the major infrastructure and school projects that have been completed in 2025 are located within the Priority Funding Area. Furthermore, many of the bills and resolutions adopted by the Howard County Council support the furtherance of many *HoCo By Design* goals and objectives. This includes the various amendments to the Subdivision and Land Development Regulations, the updates to the Zoning Regulations, the agricultural preservation initiatives, and the various other action items listed on Pages 8 and 9.

Map 3
Major Infrastructure,
Buildings and Road
Improvements



APFO Restrictions

The State of Maryland's Smart, Green and Growing legislation requires that each locality report on their Adequate Public Facilities Ordinance (APFO) restrictions that are within their Priority Funding Area (PFA). Starting July 1, 2010, local jurisdictions' first APFO reports were due to the Maryland Department of Planning, then every two years thereafter. Howard County DPZ first reported on this in 2010 and is currently providing reports annually as part of this DMS report.

The APFO report is to include: 1) the location of the restriction, 2) the type of infrastructure affected by the restriction, 3) the proposed resolution of the restriction, if available, 4) the estimated date for the resolution of the restriction, if available, 5) if a restriction was lifted, the date the restriction was lifted, and 6) the resolution that lifted the restriction.

Overview of Howard County's APFO

The Adequate Public Facilities Act of 1992 addresses "the need to provide a growth management process that will enable the County to provide adequate public roads and schools in a timely manner and achieve General Plan growth objectives. This process is designed to direct growth to areas where an adequate infrastructure exists or will exist."

Adoption of APFO in 1992 has allowed Howard County to effectively manage the amount and distribution of residential growth in accordance with growth policy set by the General Plan. Prior to adoption of APFO, the County was averaging more than 3,000 new houses per year. This rate was reduced by about half since the adoption of the 2000 General Plan, which establishes the annual number of housing unit allocations for new homes that can move through the development process. The General Plan in effect for this DMS reporting period, *HoCo By Design*, maintains this lower pace of growth. Also part of APFO is the school capacity utilization test, which limits construction in areas of the County facing school overcrowding, and the adequate roads test which determines necessary road improvements.

Allocation Restrictions in 2025

The intent of Howard County's allocation system is to phase residential growth over time based on the County's General Plan. In this way, growth

is evenly paced so the County can plan, budget, and construct capital facilities for schools, roads, water and sewer, parks, public safety, and other public infrastructure. An allocation is a single housing unit, regardless of type of housing. As an example, if a subdivision plan has 30 single family detached homes proposed, then that plan would need 30 allocations. Likewise, a plan for a 30 unit apartment building or with 30 townhouse units, would also need 30 allocations.

Under *HoCo By Design*, allocations are distributed by Character Areas. At the end of 2025, there were no residential subdivisions delayed due to allocation limitations. This is the tenth year in a row this has occurred. For all previous years, beginning with the adoption of APFO in 1992, projects have been delayed in some areas of the County due to allocation limitations. The last ten years have been an exception and reflects the recent slowdown of new subdivision projects submitted for review and approval.

The Allocations chart, which must be approved by the County Council, is adopted each July. The most recent chart under *HoCo By Design* adopted on July 1, 2025 and included a total of 1,799 available allocations in the current allocation year distributed among the Activity Centers, Other Character Areas, the Rural West, and the Affordable Housing categories. There were an additional 572 allocations available in Downtown Columbia as defined in the Downtown Columbia Master Plan.

Closed School Restrictions in 2025

After a development project receives allocations, it then takes the School Capacity test. To pass this test the elementary school district, the elementary school region, the middle school district, and the high school district where the project is located must each be under 105%, 105%, 110%, and 115% local-rated capacity, respectively. Howard County has 42 elementary schools, 20 middle schools, and 13 high schools, each in their own district. There are 6 elementary school regions containing anywhere from 5 to 10 contiguous elementary school districts.

At the end of 2025 there were 9 closed elementary school districts, 3 closed middle school districts, and no closed high school districts. This has resulted in a total of 964 housing units in 10 subdivision plans on

hold due to closed school districts. Projects are retested each year after the County Council adoption of a new School Capacity chart and may be held up for up to a maximum of 4 years.

Accommodating Future Needs

To effectively accommodate future school capacity needs, three important elements are necessary: 1) effective growth management, 2) adequate capital funding for school construction, and 3) school attendance area re-districting.

For the first element the County's APFO establish land use and growth management policies and regulations. Regular review and updates to APFO should occur to adapt to changing demographics, market conditions, and land use patterns. As required with the adoption of the County's latest General Plan, *HoCo By Design*, in December 2023, an APFO review committee was formed to review and update the regulations. The review committee's first meeting was held in August 2024, and they completed their work one year later, issuing a report of recommendations. The previous time an APFO review committee convened was in 2015, resulting in significant legislative changes to APFO in 2018. The current recommendations of changes proposed by the most recent APFO review committee are posted on DPZ's website.

Addressing the second element faces on-going challenges, particularly with increased service level expectations such as providing universal pre-K instruction as required under the Blueprint for Maryland's future. Increasing capital needs to replace or renovate older schools that are near the end of their useful life is also a growing funding challenge due to continued competition for limited capital dollars. Furthermore, in recent years school construction costs have been increasing faster than the general rate of inflation.

The third element, school attendance area re-districting, is also a useful way to solve school capacity needs. The Howard County Public School System strives to achieve important policy goals including balancing socio-economic equity among schools, keeping neighborhoods together, having a logical feeder system from elementary to middle school and from middle to high school, implementing a fair and efficient pupil transportation system, and other important factors. However, with limited funding

and land availability for new schools, re-districting is a necessary tool to utilize available systemwide capacity.

Over the last several years, there have been actions to address each of these three elements. APFO has been amended, and the General Plan update, *HoCo By Design*, was adopted and became effective at the end of 2023. As a result another APFO review committee was formed, and they finalized their recommendations in late 2025. Those recommendations will be reviewed by the County Administration and County Council with potential legislative changes to APFO to follow.

Regarding funding, the Maryland General Assembly adopted enabling legislation in the 2019 session to allow the Howard County Council to raise the school surcharge rate on new residential construction. The County Council acted on this, adopting a local bill in November 2019 (effective January 6, 2020) raising the school surcharge from \$1.32 per square foot of new residential construction to \$7.50 per square foot, with the increase phased in over two years, followed by increases based on inflation thereafter. The current rate is \$8.35 per square foot. This increase is bringing in additional revenues for school construction. However, these increased revenues may be limited to the extent that new residential development slows given limited land availability for new development.

Regarding re-districting, the Howard County Board of Education completed a comprehensive re-districting for the 2020/21 school year that included boundary line adjustments at the elementary and middle school levels. Another re-districting was adopted by the Board of Education in November 2022 to accommodate the opening of the 13th high school in the fall of 2023. The latest re-districting effort, adjusting districts for several elementary and middle schools to relieve overcrowding in Columbia, was adopted by the Howard County Board of Education on December 4, 2025. The new districts will be effective with the school year beginning in 2026.

Lot Densities

The information provided in the subsequent sections of this report include details on the amount, type and location of development in Howard County in 2025. The Smart, Green and Growing legislation also requires jurisdictions in Maryland to report on net density of growth both inside and outside priority funding areas (PFA).

The Maryland Department of Planning and Zoning was tasked to come up with a methodology on how to do this to achieve statewide consistency. They decided upon a methodology which is to calculate the number of units built divided by the unit lot size. It should be noted that while this methodology is a general determinant of density, it does not address land preservation through the creation of open space and cluster preservation lots resulting from most residential development. This is not a gross density calculation which would also include open space, roads, stormwater management, and other infrastructure, but a simple net density calculation based on lot size alone. Nonetheless, it is a good general way to report on density, achieving consistency across jurisdictions.

Lot Density by Planning Area

Table 1 shows the lot density of new residential development in Howard County in 2025 based on building permit completions. A weighted average of density is calculated from built dwelling units and their associated lot size.

The greatest average lot density occurred in Columbia at over 16 units per acre. This higher density is due to the recently Patuxent Commons apartment complex with 76 units built on 4.3 acres. The next highest average density for completed housing units is in the Southeast at close to 14 units per acre. This is followed by Ellicott City at about 11 units per acre, and Elkridge at about 2.5 units per acre for the 7 SFD units built there last year. The Rural West, as expected, had the lowest average lot density at 0.6 units per acre. This is shown graphically in Chart 12.

Lot Density Inside Versus Outside the County’s Priority Funding Area (PFA)

Table 2 shows the lot density inside and outside the PFA. Outside the PFA is the combined results of all planning areas excluding the Rural West. Combining all east County planning areas results in a lot density of 12.8 units per acre. This compares to a much smaller lot density of 0.6 units per acre outside the PFA.

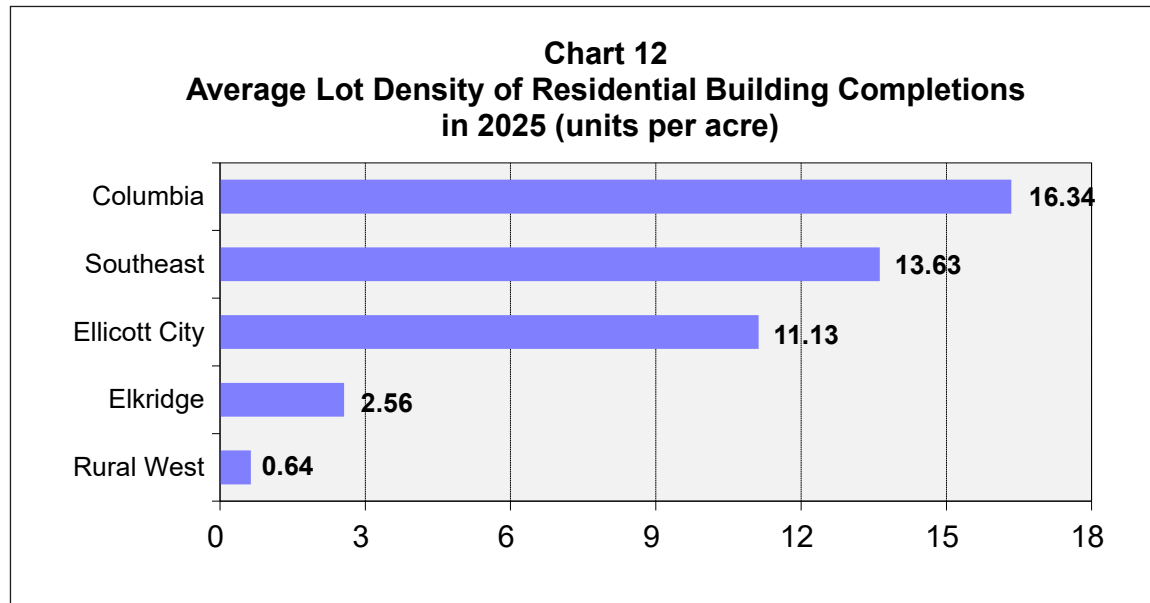
Map 4 shows the location of the completed units and also the relative lot densities. The map includes the PFA line. It is clear from the map that greater lot densities are being achieved inside the PFA.

Table 1
Lot Density of Units Built in 2025 - By Planning Area

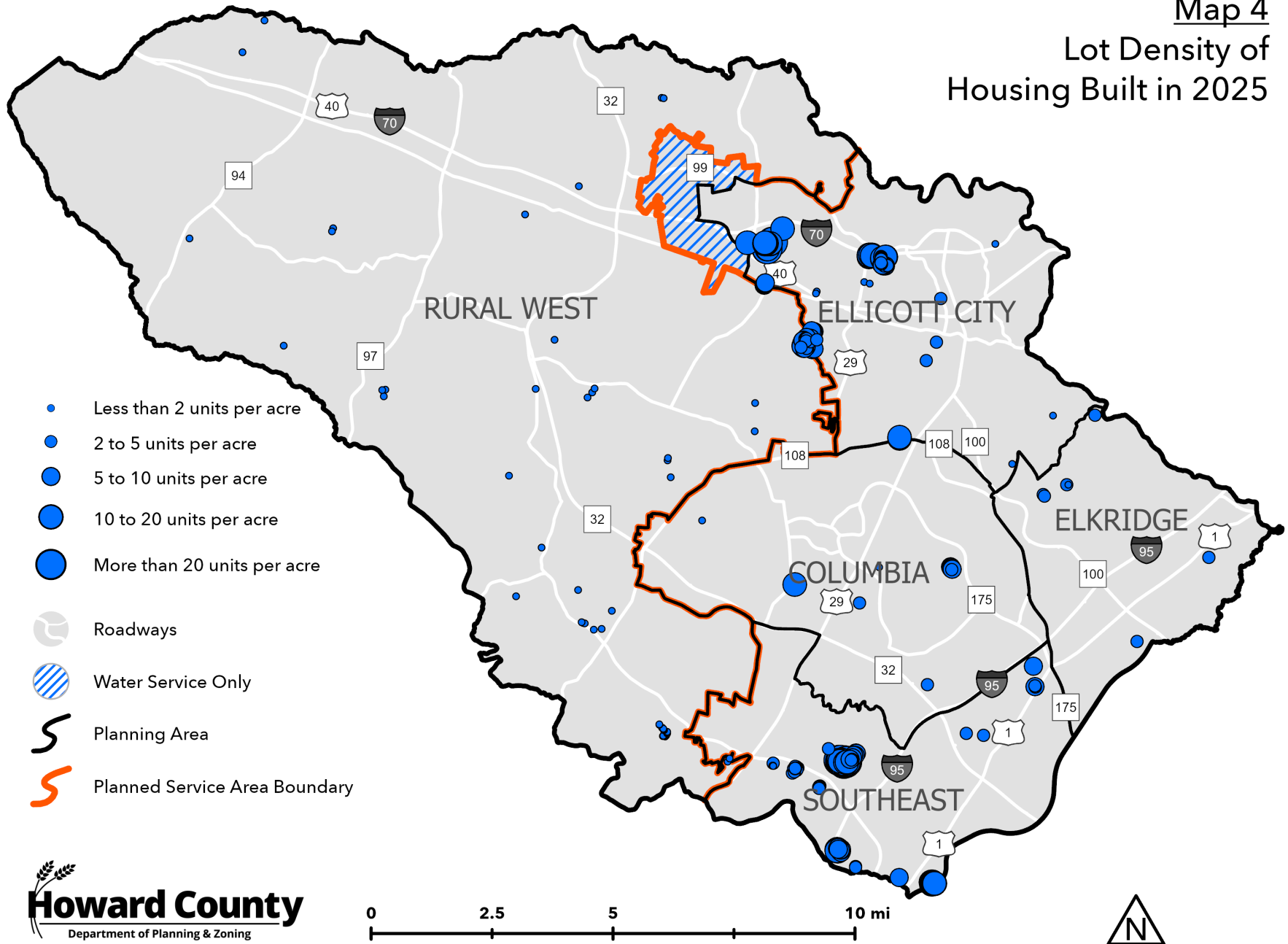
Planning Area	Units		Total Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Columbia	85	15%	7.1	2.3%	16.34
Elkridge	7	1%	2.9	0.9%	2.56
Ellicott City	228	40%	30.4	9.8%	11.13
Rural West	62	11%	245.6	79.6%	0.64
Southeast	190	33%	22.5	7.3%	13.63
TOTAL	572	100%	308.5	100.0%	11.49

Table 2
Lot Density of Total Units Built in 2025 - Inside vs. Outside PFA

Planning Area	Units		Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	510	89%	62.8	20%	12.81
Outside PFA	62	11%	245.6	80%	0.64
TOTAL	572	100%	308.5	100%	11.49



Map 4
Lot Density of
Housing Built in 2025



Local Growth Goal

The Smart, Green and Growing legislation stipulates that the statewide land use goal is to increase the percentage of growth located within the Priority Funding Areas and to decrease the percentage of growth located outside the Priority Funding Areas (PFA). Under the legislation local jurisdictions are required to report on their local goal, the timeframe for achieving the local goal, the resources necessary for infrastructure inside the priority funding area and land preservation outside the priority funding area, and any incremental progress made towards achieving the local goal.

Howard County’s Growth Goal

The basis for Howard County’s growth goal described in this current year DMS report is the general plan effective in 2024, which is *HoCo By Design* adopted in December 2023. This plan indicates how many units are to be built each year, both inside and outside the County’s Priority Funding Area. The County’s Adequate Public Facilities Ordinance (APFO) is the mechanism to ensure this growth is managed to the goal.

HoCo By Design sets the annual number of housing unit allocations outside the Priority Funding Area in the Rural West to 100 per year. It had been 150 per year prior to the adoption of *PlanHoward 2030* in 2012. Prior to that, with the adoption of the *2000 General Plan* in 2000, the number had been 250 per year. The initial reduction from 250 units to 150 units was based on the re-allocation of 100 units to a new “Green Neighborhood” allocation pool for projects that meet environmentally sustainable site and building design criteria. With the adoption of *PlanHoward 2030* an additional 50 units were shifted from the Rural West to the Green Neighborhood allocation pool. This policy change not only reduced the annual number of housing units to be built outside the PFA, but also promotes more sustainable development within the County. *HoCo By Design* maintains the lower level of 100 units per year in the Rural West.

The General Plan was also amended in 2010 to allow additional units to Downtown Columbia as part of the Downtown Master Plan. The APFO housing unit allocation chart, adopted annually by the County Council, reflects this change allowing more units in Downtown Columbia.

Table 3 summarizes future growth projections based on *Hoco By Design* from 2026 to 2040. A total of 1,500 new units are allocated to areas out-

side the PFA, representing only 6.2% of all new units Countywide. The remaining 93.8% of future units are allocated to areas inside the PFA.

Progress Towards Growth Goal

For the current reporting period, based on September 30, 2025, unit counts, 11.8% of all housing units in the County are outside the PFA. The remaining 88.2% are inside the PFA. This is summarized in Table 4.

Comparing this to the *HoCo By Design* policy of allocating only 6.2% of future units to areas outside the PFA, it is clear that progress towards the goal of decreasing the percentage of growth outside the PFA is being met. Table 5 below shows the sum of total units currently built plus those newly allocated by 2040. The percentage of total units outside the PFA will decrease between now and then, from 11.8% currently to 10.9% by 2040.

Table 3
HoCo By Design Growth Projections
2026 to 2040

Inside PFA	22,794	93.8%
Outside PFA	1,500	6.2%
Total	24,294	100.0%

Table 4
Total Built Units in Howard County
September 30, 2025

Inside PFA	112,539	88.2%
Outside PFA	15,082	11.8%
Total	127,621	100.0%

Table 5
Total Units by 2040 based on HoCo By Design

Inside PFA	135,333	89.1%
Outside PFA	16,582	10.9%
Total	151,915	100.0%

Resources to Achieve Goal

In addition to the County’s APFO, described above, which regulates the timing and location of growth, the Agricultural Land Preservation Program also helps reduce development capacity outside of the PFA while preserving land. The County’s rural zoning is an additional mechanism preserving environmental or agricultural easements in place of housing units through a density transfer mechanism. This has been in place since the early 1990s.

Other resources include road and schools excise taxes on new construction. These excise tax revenues are used to fund new major road and school capacity enhancements directly related to new growth. It is the goal to use such revenues for new infrastructure inside the PFA.

The County has also created higher density mixed-use zones along the Route 1 and Route 40 corridors, initially in 2003 and expanded thereafter in 2013, adopted the Downtown Columbia Plan in 2010, created additional higher density Activity Centers in the eastern part of the County with the adoption of *HoCo By Design* in 2023, and recently adopted the Gateway Master Plan in 2025 (the largest Activity Center). All this has created additional capacity in the East concentrating growth there rather than the Rural West part of the County outside the PFA. Please refer to *HoCo By Design* for a discussion on and maps depicting the Activity Centers in Howard County.

Plan Processing Times

In 2025, the Maryland General Assembly enacted a new law requiring local governments with a population over 150,000 to measure and report on residential development plan processing times for all plan types. This reporting is due by July 1 of each year for the previous calendar year. This is the second time this information is reported in Howard County’s DMS report. The mean and median processing times in days as well as the standard deviation from the mean is reported. Table 6 shows these results for 2025.

The results in Table 6 reflect plans by plan type that had signature approval in 2025, and also recorded final plans in 2025. The timeframe is from the initial plan submission until the signature approval date (or recorded date for final plans) including the time for required plan revisions. The mean time ranges from 181 days for Environmental Concept Plans to 574 days for Preliminary Plans (of which there was only one). The median time ranges from 118 days for Environmental Concept Plans to 574 days for the Preliminary Plan. The standard deviations from the mean are also shown. These range from 53 days for Preliminary Equivalent Sketch Plans to 421 days for Final Plan recordations. The greater standard deviation for Final Plans reflects the longer approval time for several of the plans often due to developers pausing their plan processing and requesting an alternative compliance to extend plan submission milestone dates.

Table 6
Plan Review Times by Plan Type for Plans Completed in 2025 - Total Days

Measure	Environ-	Preliminary			Site	
	mental Concept	Sketch	Sketch	Preliminary	Final	Development
Number of Plans	27	3	3	1	36	24
Mean Time in Days	181	289	390	574	367	376
Median Time in Days	118	309	362	574	162	378
Standard Deviation from Mean	139	150	53	0	421	205

Residential Development

Recorded Residential Subdivisions

The residential development process in Howard County usually begins with the subdivision of land. Depending upon the size, type and location of subdivision, the process may include:

- a multi-phase plan review process: environmental concept plan, sketch plan, preliminary plan and final plan;
- a consolidated review: environmental concept plan, preliminary equivalent sketch plan and final plan;
- a minor review (four buildable lots or less) involving only an environmental concept plan and a final plan;

Upon final subdivision plan approval, lots can be recorded. It is important to note that not all new housing units, such as apartment buildings and condominium developments on existing parcels, go through the subdivision process. Furthermore, some lots that have been built on in 2025 were recorded or in existence prior to 2021, the first year of this current DMS analysis period. Therefore, units from recorded lots do not reflect all development activity in the County over the current reporting period.

For this report, the number of residential plans recorded, the number of potential units from recorded lots, and the acreage of plans recorded have been compiled by the planning area plus Downtown Columbia as its own area.

Summary of Latest Reporting Period

For the latest reporting period from January 1, 2025, through December 31, 2025, there was potential for 448 housing units from recorded lots Countywide in 36 subdivision plans totaling 477 acres (Table 7). Ellicott City had the most with 398 units, 89% of the total. Elkrige had potential for 27 units, 6% of the total. There were 18 units in recorded subdivision plans in the Rural West (4%), 5 units in Columbia (1%) and no units in the Southeast. These represent net new unit potential and do not include total

recorded lots from resubdivisions that do not create new unit potential. For example, resubdivisions may combine existing lots to create a smaller number of new lots compared to the original. Or, subdivisions may be recorded to simply adjust lot lines or add easements. If known, condo and apartment units are included in the unit total for large parcel recordations.

Of the total 442 acres recorded, 241 acres, or about 51%, were in the Rural West. It should be noted that recorded acreage is not necessarily a clear indicator of development activity given that these figures include subdivisions and resubdivisions with the sole purpose of revising lot lines or adding easements resulting in no additional units.

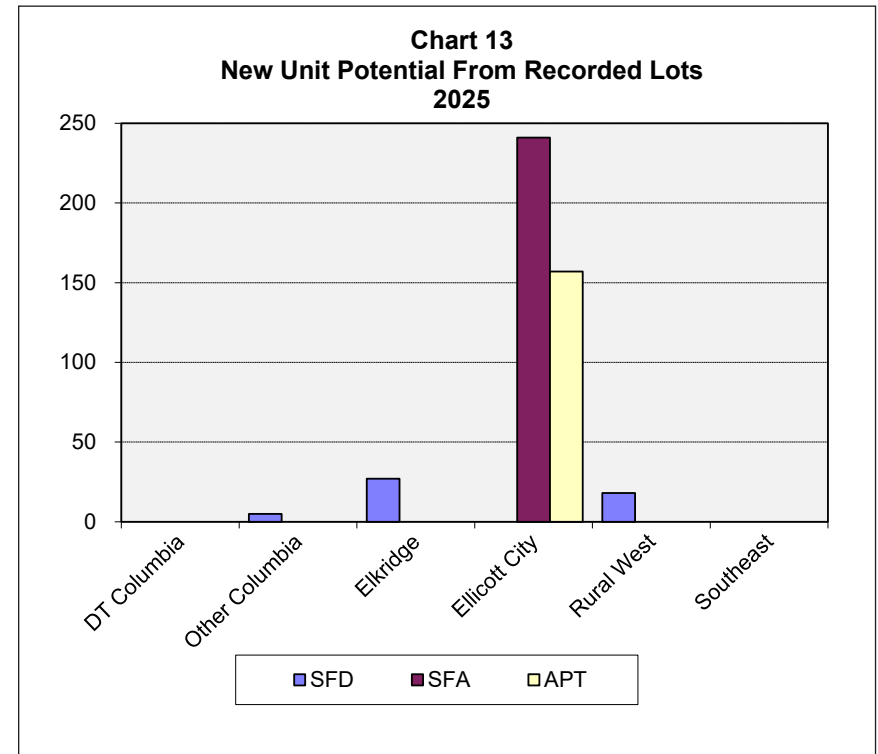
Table 8 shows new units from recorded lots by unit type. Of the 448 units from recorded lots, 50 are for single family detached units (SFD), 241 are for single family attached or townhouse units (SFA), and 157 for apartment units (APT). Chart 13 shows these results graphically by Planning Area.

Table 7
Recorded Residential Subdivisions in 2025

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	5	1%	3	8%	6	1%
Elkridge	27	6%	8	22%	39	8%
Ellicott City	398	89%	10	28%	188	39%
Rural West	18	4%	12	33%	241	51%
Southeast	0	0%	3	8%	3	1%
TOTAL	448	100%	36	100%	478	100%

Table 8
Unit Potential from Recorded Lots by Unit Type in 2025

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	5	0	0	0	5	1%
Elkridge	27	0	0	0	27	6%
Ellicott City	0	241	157	0	398	89%
Rural West	18	0	0	0	18	4%
Southeast	0	0	0	0	0	0%
TOTAL	50	241	157	0	448	100%
PERCENT	11%	54%	35%	0%	100%	



Last Year's Projects - 10 or More Units

Of the total 448 units from lots recorded for the latest reporting period, 413 or about 92% were in subdivisions consisting of 10 units or more. These larger subdivisions, shown in Table 9, are located in two of the five planning areas. The precise locations of these plans are shown on Map 5.

These larger recorded plans include Crested View and Halcyon as part of the Taylor Village development in Ellicott City, and Cascade Ridge in Elkridge.

Map 5
Recorded Residential
Subdivision Plans

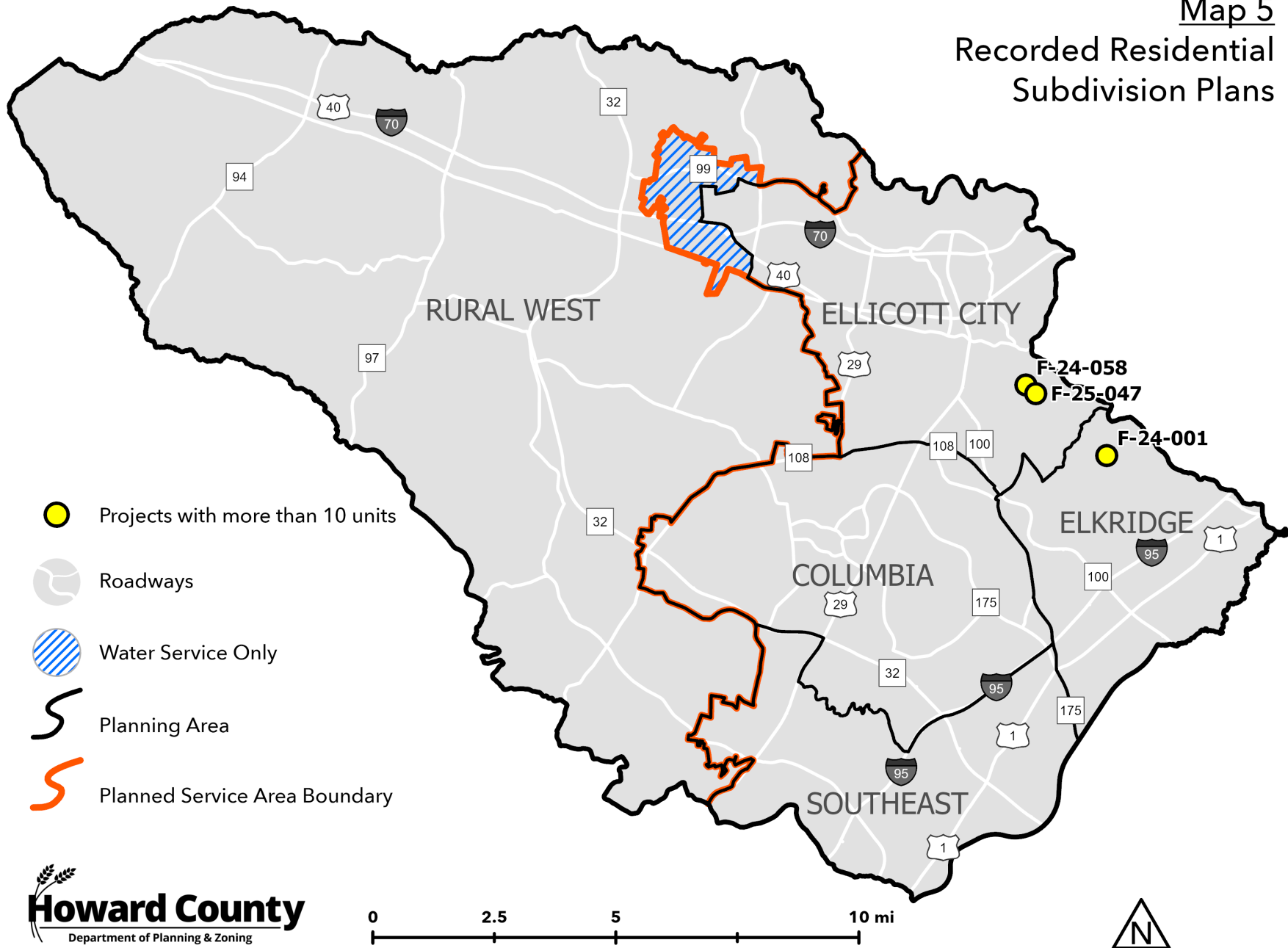


Table 9
Recorded Residential Subdivision Plans, Projects With 10 Units or More in 2025

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Elkridge	F-24-001	Cascade Ridge	SFD	15	15
Ellicott City	F-24-058	Crested View at Taylor	SFD & SFA - 14 MIHU	237	237
	F-25-047	Halcyon at Taylor Properties	SFA - 17 MIHU	161	161
TOTAL					413

Five Year Results

Table 10 shows the recorded subdivisions for the last five years beginning in 2021. Over this time period, lots for 1,846 units countywide in 259 subdivision plans totaling 4,009 acres were recorded. This equates to an annual average of 369 units per year.

Note that the acreage figure represents all acreage on recorded plats including open space and preservation easements, as well as resubdivisions, sending and receiving preservation parcels, and recordations that do not add any new units such as recording for the purpose of adding easements or adjusting parcel lines.

Table 10
Recorded Residential Subdivision, 2021 to 2025

Year	Units	Plans	Acreage
2021	299	79	2,001
2022	677	57	732
2023	194	45	356
2024	228	42	442
2025	448	36	478
TOTAL	1,846	259	4,009
ANNUAL AVG.	369	52	802

Table 11 summarizes the number of units from recorded lots by unit type for each of the last five reporting periods. Over this timeframe, recorded lots created the potential for 638 single family detached units, 35% of the total 1,846. A total of 1,049, 57%, were for single family attached units and the remaining 159, 9%, were for apartments units (rental and condo).

Table 11
Unit Potential from Recorded Lots by Unit Type, 2021 to 2025

Year	SFD	SFA	APT	MH	Total
2021	175	122	2	0	299
2022	222	455	0	0	677
2023	109	85	0	0	194
2024	82	146	0	0	228
2025	50	241	157	0	448
TOTAL	638	1,049	159	0	1,846
PERCENT	35%	57%	9%	0%	100%
ANNUAL AVG.	128	210	32	0	369

In-Process Residential Subdivisions

As indicated in the previous section, the residential development process in Howard County usually begins with the subdivision of land. Depending upon the size, type and location of subdivision, the process may include:

- a multi-phase plan review process: environmental concept plan, sketch plan, preliminary plan and final plan;
- a consolidated review: environmental concept plan, preliminary equivalent sketch plan and final plan;
- a minor review (four buildable lots or less) involving only an environmental concept plan and a final plan;

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in several stages (environmental concept, sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of December 31, 2025, are tabulated and compared with those in process the prior year (as of December 31, 2024).

Number of Plans

There were 2 less residential plans in process as of December 31, 2025, compared to one year earlier – 107 plans in 2025 compared to 109 in 2024 (Table 12).

For the current year, the Rural West had the greatest number of residential plans in process with 32, followed by the Ellicott City with 31, ElkrIDGE with 22, the Southeast with 19, and Columbia with 3.

Of the 107 plans in process on December 31, 2025, 60 were final plans, 29 were environmental concept plans, 9 were sketch plans, 8 were preliminary equivalent sketch plans, and 1 was a preliminary plan.

Number of Potential Units

There were 309 less units in process on December 31, 2025, compared to the previous year – 3,297 units compared to 3,606 units (Table 13).

It is important to note that a significant number of the 3,297 units in process are part of phased projects with building planned for future years.

Table 12
Number of Residential Subdivision Plans in Process, 12/31/25
 (With comparisons to Countywide total as of 12/31/24)

Planning Area	Environmental Concept	Preliminary Equivalent			TOTAL PLANS
		Sketch	Sketch	Preliminary Final	
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	0	1	0	2
ElkrIDGE	4	3	0	0	15
Ellicott City	7	2	4	1	17
Rural West	9	0	3	0	20
Southeast	9	4	0	0	6
TOTAL	29	9	8	1	60
As of 12/31/24	29	11	10	1	58

Phasing is often at a developer’s preference and dictated based on market absorption, and also results from APFO regulations that limit the number of allocations available each year. As shown in Table 14, 1,418 units are part of phased plans, with building planned as far out as 2032. Phased plans represent 43% of the total units in process.

The phased projects include Maple Lawn in the Southeast; Turf Valley in Ellicott City; and Oxford Hills (Erickson) in the Columbia Planning Area.

As reflected in Table 13, 9% of the units in process are single family detached units. About 8% are single family attached units and 83% are apartment units (condo or rental). Table 15 shows details by plan stage and unit type for this year by planning area. Chart 14 graphically illustrates the units in process by unit type for each planning area.

Table 13
Number of Potential Units from Subdivision Plans in Process, 12/31/25
 (With comparisons to Countywide total as of 12/31/24)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	0	0	0
All Other Columbia	27	0	1,200	0	1,227
Elkridge	40	191	722	0	953
Ellicott City	131	73	152	0	356
Rural West	67	0	0	0	67
Southeast	44	0	650	0	694
TOTAL	309	264	2,724	0	3,297
PERCENT	9%	8%	83%	0%	100%
As of 12/31/24	322	363	2,921	0	3,606

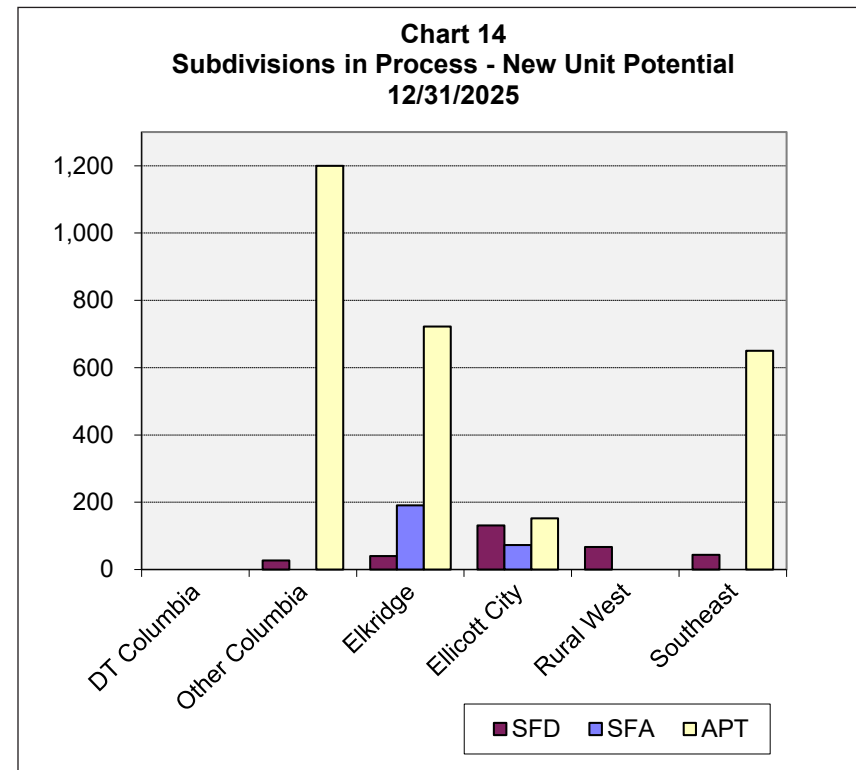


Table 14
Potential Units from Phased Projects in Process, 12/31/25

Planning Area	2026	2027	2028	2029	2030	2031	2032	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0
All Other Columbia	0	200	200	200	200	200	200	1,200
Elkridge	0	0	0	0	0	0	0	0
Ellicott City	0	0	40	40	40	40	26	186
Southeast	0	0	0	0	32	0	0	32
Rural West	0	0	0	0	0	0	0	0
TOTAL	0	200	240	240	272	240	226	1,418

Note: Does not include phased project units on already recorded plats or signed SDP's

Table 15
Number of Potential Units from Subdivision Plans in Process by Unit Type, 12/31/25

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0	0	0
All Other Columbia	0	0	0	0	0	26	0	0	0	26
Elkridge	4	54	451	0	509	0	0	0	0	0
Ellicott City	9	34	152	0	195	65	0	0	0	65
Rural West	0	0	0	0	0	36	0	0	0	36
Southeast	34	0	650	0	684	0	0	0	0	0
TOTAL	47	88	1,253	0	1,388	127	0	0	0	127

Planning Area	Preliminary					Final					TOTAL - 12/31/25				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
All Other Columbia	0	0	0	0	0	1	0	1,200	0	1,201	27	0	1,200	0	1,227
Elkridge	0	0	0	0	0	36	137	271	0	444	40	191	722	0	953
Ellicott City	8	0	0	0	8	49	39	0	0	88	131	73	152	0	356
Rural West	0	0	0	0	0	31	0	0	0	31	67	0	0	0	67
Southeast	0	0	0	0	0	10	0	0	0	10	44	0	650	0	694
TOTAL	8	0	0	0	8	127	176	1,471	0	1,774	309	264	2,724	0	3,297

Number of Acres

As of December 31, 2025, a total of 923 acres of residential land were in the subdivision process. This is 221 less acres compared to the previous year, at which time there were 1,144 acres in process (Table 16).

Major Projects

Table 17 shows a list of potential units from larger projects currently under review with more than 30 units. This list includes comprehensive and phased projects. Map 6 shows the location of these projects. The projects in this list include Erickson-Oxford Hills, the Elms at Elkridge, Weinman Apartments, Dorsey Business Center, Elkridge Crossing Section 4, Crestview at Turf Valley, Miller’s Farm, Poplar Park at Turf Valley, 10010 Junction Drive, and Maple Lawn Farms. These major projects with more than 30 units total 3,062 units which account for about 93% of the total 3,297 units in the subdivision process as of the end of 2025.

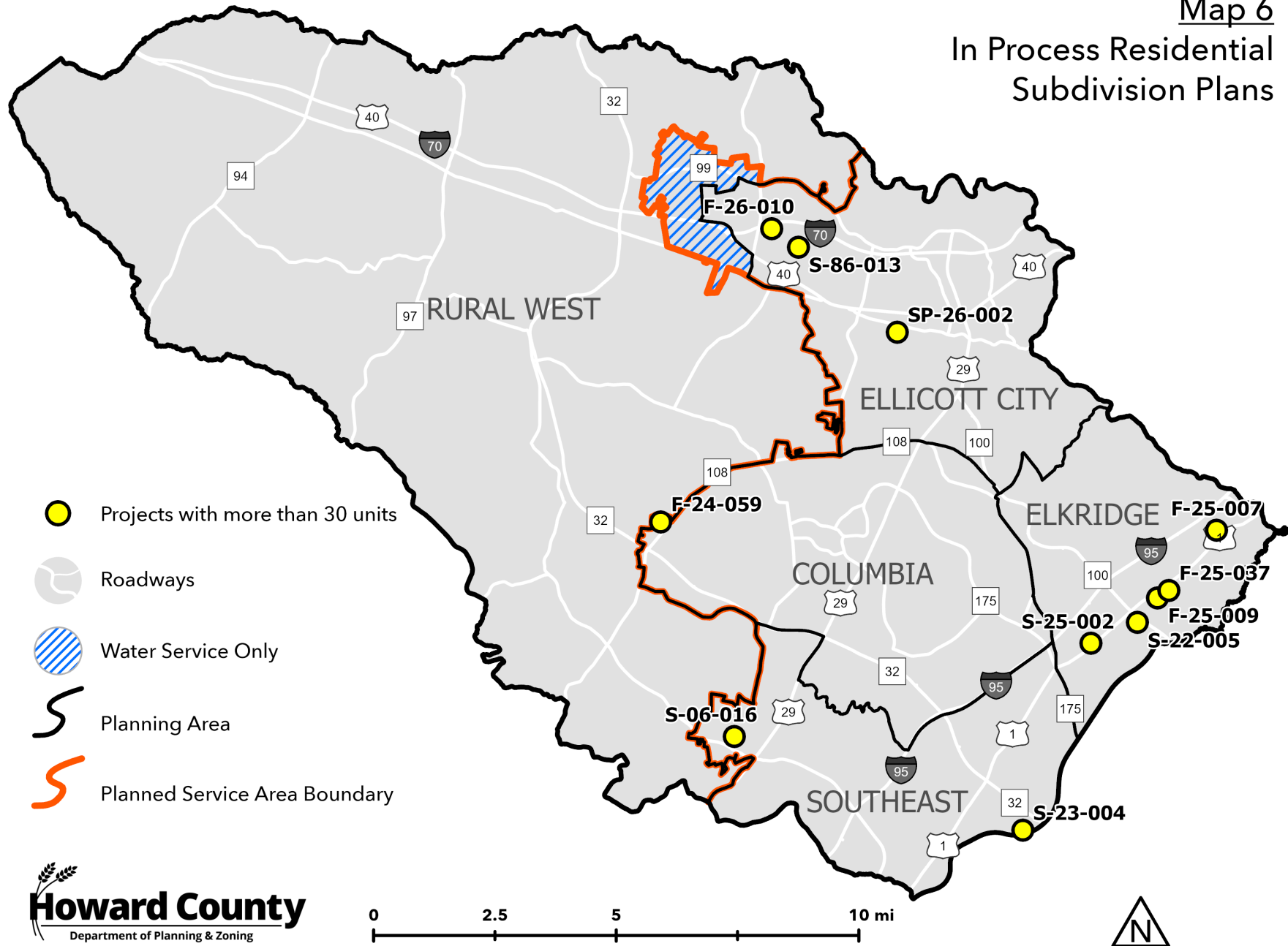
Table 16
Acres of Residential Subdivision Plans in Process, 12/31/25
(With comparisons to Countywide total as of 12/31/24)

Planning Area	Preliminary Equivalent				TOTAL ACRES
	Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	15	0	62	77
Elkridge	15	0	0	81	97
Ellicott City	19	49	6	152	226
Rural West	0	139	0	362	500
Southeast	15	0	0	8	23
TOTAL	49	203	6	665	923
As of 12/31/24	114	259	3	768	1,144

Table 17
In-Process Residential Subdivision Plans, Projects With More than 30 Units, 12/31/25

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	F-24-059	Erickson - Oxford Hills	APT - Age Restricted - 120 MIHU	1,200	1,200
Elkridge	F-25-009, 037	Elms at Elkridge	APT, SFA - 54 MIHU, 44 Age Restricted	360	906
	S-25-002	Weinman Apartments	APT, SFA - 39 MIHU	255	
	S-22-005	Dorsey Business Center	APT - 38 MIHU	250	
	F-25-007	Elkridge Crossing, Section 4	SFA - 3 MIHU	41	
Ellicott City	S-86-013	Turf Valley - Remaining Phases	SFA, APT	186	274
	SP-26-002	Miller's Farm	SFD	49	
	F-26-010	Poplar Park at Turf Valley	SFA	39	
Southeast	S-23-004	10010 Junction Drive	APT -- 98 MIHU	650	682
	S-06-016	Maple Lawn Farms	SFD	32	
TOTAL					3,062

Map 6 In Process Residential Subdivision Plans



Approved Residential Site Development Plans

The site development plan (SDP) process is typically the next development stage after lots are recorded. Once a SDP has received signature approval, building permits can be issued, after which actual land development can begin. SDP signature approval is therefore a good indicator of near-term development activity in the planned service area. However, SDPs are not required for single family detached lots in the Rural West. Consequently, SDPs do not account for all residential growth in the County.

Similar to subdivision activity, site development plan activity has been compiled by the five planning areas. The number of residential site development plans approved, the number of residential lots approved, and the acreage of approved plans have been compiled for each of these areas and are discussed below.

Summary of Latest Reporting Period

In 2025 there were 603 housing units approved in 25 site development plans totaling 94 acres (Table 18). The Ellicott City had 515 approved units, followed by Elkridge with 52 units, Columbia with 32 units, and the Southeast with 4 units. There were no approved units in the Rural West and Downtown Columbia in 2025.

Table 19 shows new units from approved site development plans by unit type. Of the 603 approved units, 20% were for single family detached units, 35% were for single family attached units and 45% for apartment units (rental and condo). Chart 15 shows these results graphically.

Table 19
Approved Units in SDP's by Unit Type in 2025

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	32	0	0	0	32	5%
Elkridge	52	0	0	0	52	9%
Ellicott City	30	213	272	0	515	85%
Rural West	0	0	0	0	0	0%
Southeast	4	0	0	0	4	1%
TOTAL	118	213	272	0	603	100%
PERCENT	20%	35%	45%	0%	100%	

Chart 15
Units in Approved Site Development Plans 2025

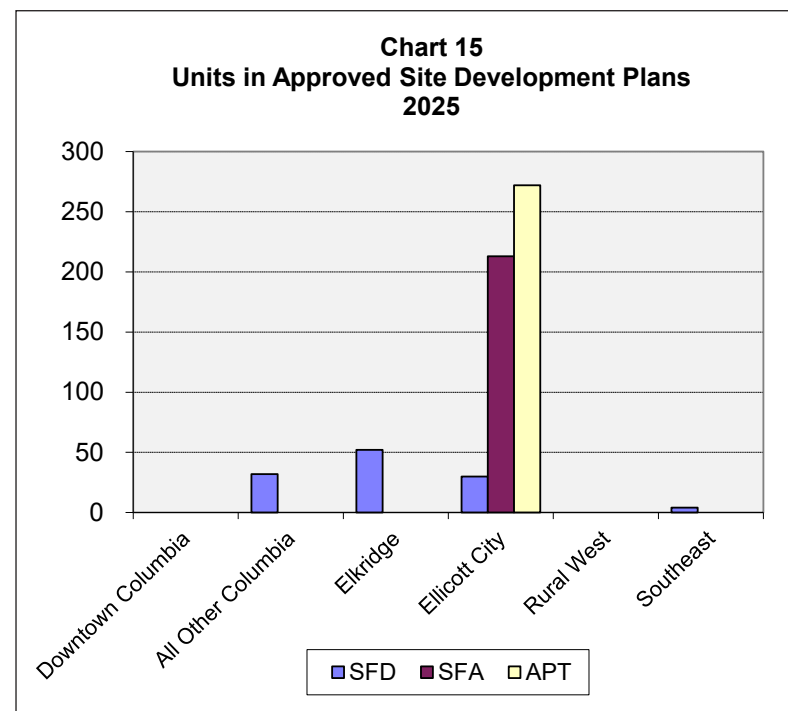


Table 18
Approved Residential Site Development Plans in 2025

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	32	5%	4	16%	13	14%
Elkridge	52	9%	9	36%	15	16%
Ellicott City	515	85%	9	36%	64	68%
Rural West	0	0%	0	0%	0	0%
Southeast	4	1%	3	12%	2	2%
TOTAL	603	100%	25	100%	94	100%

Last Year's Projects - Greater than 20 Units

Of the total 603 units approved in site development plans last year, 551 or about 91% were in part of projects with more than 20 units. These larger projects, shown in Table 20, are located in three planning areas. The location of these plans are shown on Map 7.

Five Year Results

Tables 21 and 22 show the approved residential site development plans from January 1, 2021 to December 31, 2025. Over this five-year period 4,295 units were approved countywide in 146 site development plans totaling 613 acres. This results in an average of 859 approved units per year.

Table 20
Approved Residential SDP's, Projects With More Than 20 Units in 2025

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-24-017	Trotter's Retreat	SFD - Age Restricted	25	25
Elkridge	SDP-24-018	Kerger Pond	SFD - Age Restricted	27	27
Ellicott City	SDP-24-034	Crested View at Taylor	SFD, SFA - 14 MIHU	257	499
	SDP-24-020	Bethany Glen	SFD, SFA - Age Restricted	88	
	SDP-23-039	That Place at Patapsco Park	APT - Age Restricted - 3 LIHU	83	
	SDP-22-021	Bethany Glen	SFD, SFA - Age Restricted	39	
	SDP-25-003	Villages at Turf Valley	APT	32	
TOTAL					551

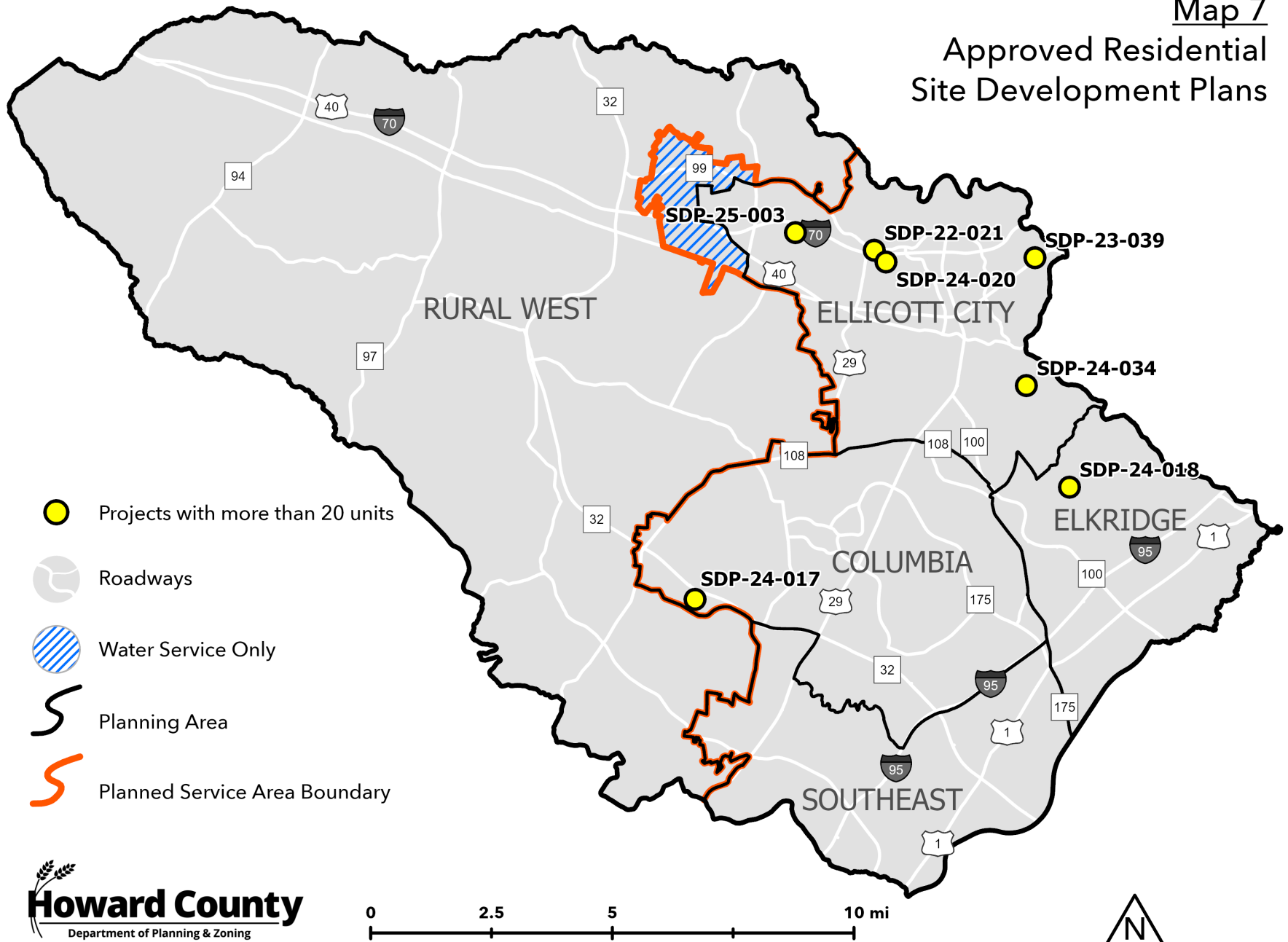
Table 21
Approved Units in Residential Site Development Plans, 2021 to 2025

Year	SFD	SFA	APT	MH	Total
2021	325	87	264	0	676
2022	177	553	229	0	959
2023	224	246	883	0	1,353
2024	124	120	460	0	704
2025	118	213	272	0	603
TOTAL	968	1,219	2,108	0	4,295
PERCENT	23%	28%	49%	0%	100%
ANNUAL AVG.	194	244	422	0	859

Table 22
Approved Residential Site Development Plans, 2021 to 2025

Year	Units	Plans	Acreage
2021	676	38	134
2022	959	28	96
2023	1,353	31	120
2024	704	24	169
2025	603	25	94
TOTAL	4,295	146	613
ANNUAL AVG.	859	29	123

Map 7 Approved Residential Site Development Plans



In-Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of plans, potential units and acreage currently being processed as of December 31, 2025, are tabulated and compared to those in process a year earlier (as of December 31, 2024). SDPs are generally not required for large lots in the Rural West. Consequently, SDPs do not account for all residential growth in the County.

Number of Plans

There was one more residential site development plans in process as of December 31, 2025, compared to the prior reporting period in 2024, 42 in 2025 compared to 40 in 2024 (Table 23).

Table 23
Number of Residential SDP's In Process, 12/31/25 & 12/31/24

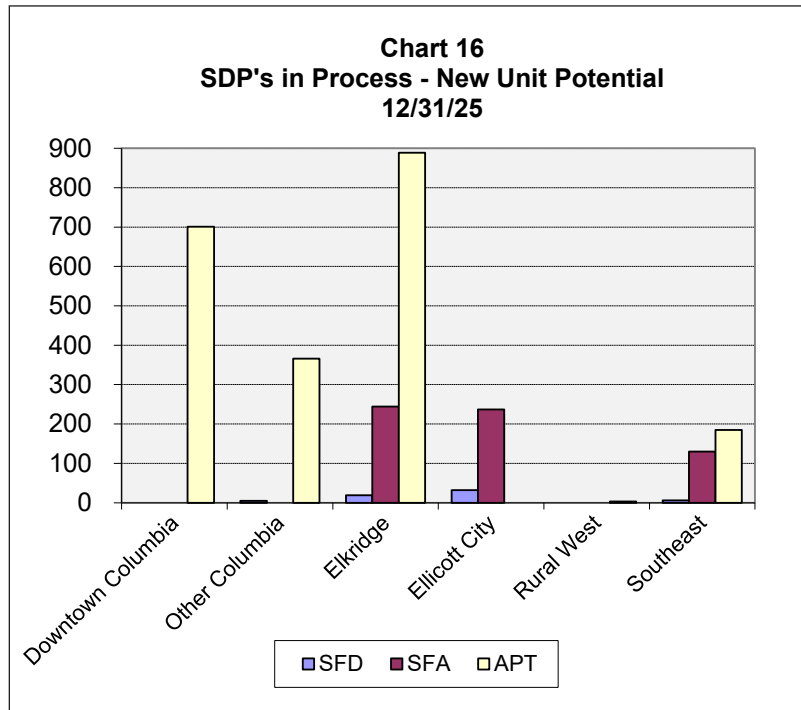
Planning Area	2025	2024
Downtown Columbia	1	1
All Other Columbia	6	5
Elkridge	17	14
Ellicott City	10	13
Rural West	1	0
Southeast	7	7
TOTAL	42	40

Number of Potential Units

There were 533 more units in process as of December 31, 2025, compared to December 31 of the previous year, 2,817 units compared to 2,284 units (Table 24). The greatest number of units in process are for apartments (including rental and condo) with 2,144 proposed units in 2025. This is followed by 611 proposed single family attached or townhouse units and 62 single family detached units. Chart 16 graphically illustrates the units in process by unit type for the current year by planning area.

Table 24
Number of Potential Units from Site Development Plans in Process, 12/31/25
(With comparisons to Countywide total as of 12/31/24)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	701	0	701
All Other Columbia	5	0	366	0	371
Elkridge	19	244	889	0	1,152
Ellicott City	32	237	0	0	269
Rural West	0	0	3	0	3
Southeast	6	130	185	0	321
TOTAL	62	611	2,144	0	2,817
As of 12/31/24	120	368	1,796	0	2,284



Number of Acres

As of December 31, 2025, a total of 229 acres of residential land were in the site development plan process. This is 23 more acres than the previous year when there were 206 acres in process (Table 25).

Major Projects

Table 26 shows a list of potential units from larger projects with 20 or more units. Map 8 shows the location of these projects. Of the 2,817 units in the site development plan process, 2,576 or about 91% were in projects with 20 or more units.

The larger projects include the Lakefront North Phase 1 in Downtown Columbia; Erickson Oxford Hills Phase 1 in Columbia; O'Donnell Properties, Elms at Elkridge, Dorsey Business Center, and Blue Stream Brompton 3 in Elkridge; Halcyon at Taylor Highlands in Ellicott City; and Corridor Road Apartments Station Overlook and Paddock Pointe - Phase 5A in the Southeast.

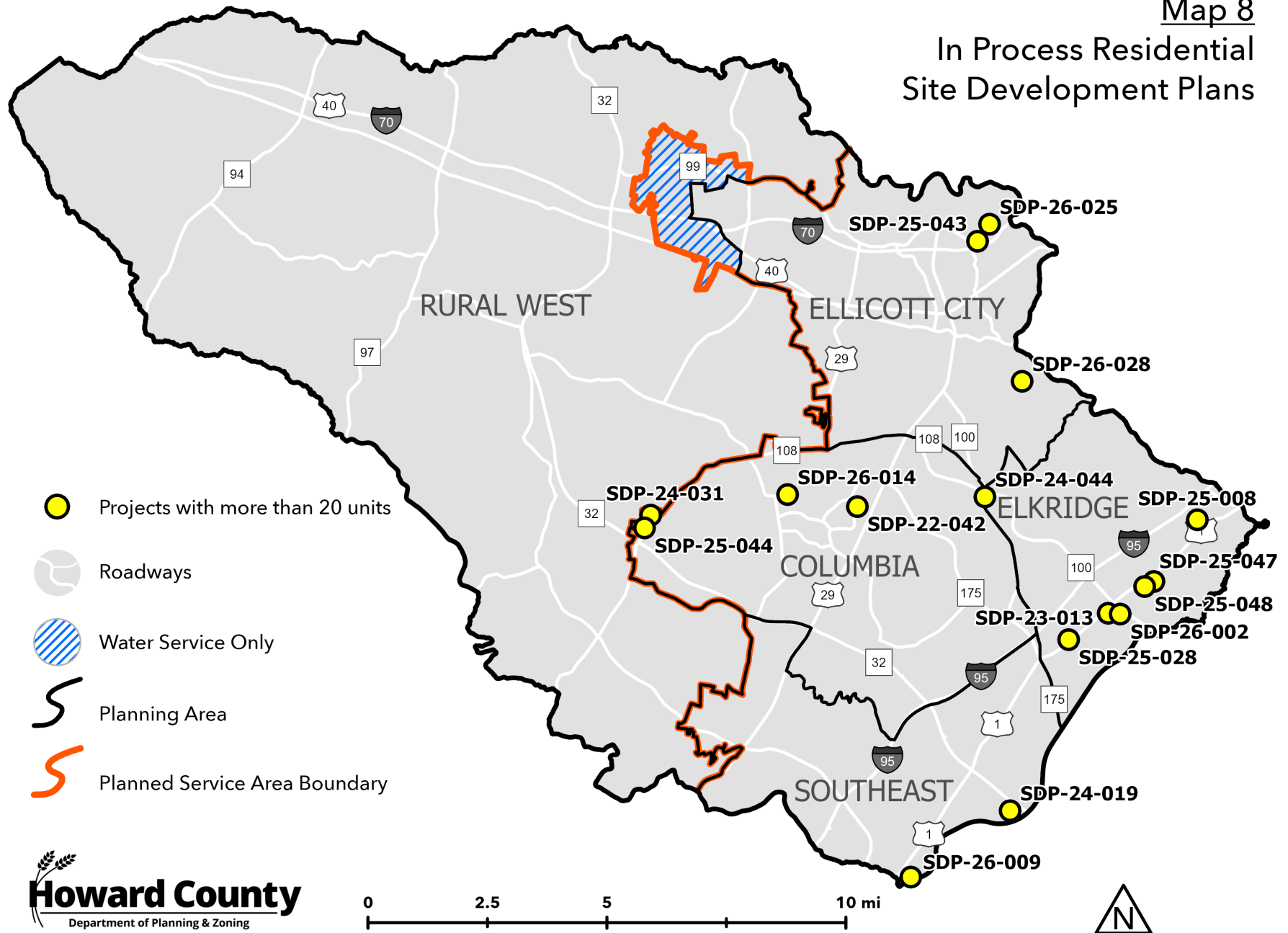
Table 25
Acreeage of Residential SDP's In Process, 12/31/25 & 12/31/24

Planning Area	2025	224
Downtown Columbia	11	11
All Other Columbia	66	75
Elkridge	58	37
Ellicott City	65	66
Rural West	7	0
Southeast	22	17
TOTAL	229	206

Table 26
In Process Residential Site Development Plans, Projects With 20 or More Units, 12/31/25

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-22-042	Downtown Columbia - Lakefront North Phase 1	APT - 57 MIHU	701	701
Columbia	SDP-24-031	Erickson - Oxford Hills - Ph. 1	APT - Age Restricted - 28 MIHU	274	366
	SDP-25-044	Clarksville Commons II	APT	72	
	SDP-26-014	Fall River Terrace Apartments	APT - 10 MIHU	20	
Elkridge	SDP-23-013	O'Donnell Properties	APT - 43 MIHU	285	1,129
	SDP-25-048	Elms at Elkridge	APT, APT - Age Restricted - 41 MIHU	271	
	SDP-26-002	Dorsey Business Center	APT - 36 MIHU	238	
	SDP-25-028	Blue Stream - Brompton 3	SFA - 20 MIHU	107	
	SDP-24-044	5497 Waterloo Road	APT - Age Restricted - 10 MIHU	95	
	SDP-25-047	Elms at Elkridge	SFA - 13 MIHU	89	
	SDP-25-008	Elkridge Crossing II, Section 4, Area 1	SFA - 7 MIHU	44	
Ellicott City	SDP-26-028	Halcyon at Taylor Highlands	SFA - Age Restricted - 17 MIHU	161	250
	SDP-25-043	Rockland Terrace	SFD, SFA - Age Restricted	63	
	SDP-26-025	Daniels Mill Overlook	SFA - Age Restricted	26	
Southeast	SDP-24-019	Corridor Road Apartments Station Overlook	APT - 28 MIHU	182	130
	SDP-26-009	Paddock Pointe - Phase 5A	SFA - 20 MIHU	130	
TOTAL					2,576

Map 8
In Process Residential
Site Development Plans



Residential Building Permits & Use and Occupancy Permits

The final stage of the development process is the issuance of building permits. This section of the report tabulates building permits for all new residential construction. Once construction is complete and prior to residents moving in, use and occupancy permits are required. These are also tabulated and discussed further below. Both building permits and use and occupancy permits have been compiled by planning area.

Issued Building Permits

Summary of Last Year

From January 1, 2025, to December 31, 2025, the County issued 716 residential building permits for new construction (Table 27). Ellicott City had the greatest number issued with 272, followed by Downtown Columbia with 174, other parts of Columbia with 99, the Southeast with 91, the Rural West with 68, and Elkridge with 12. Countywide, 28% of the permits were for single family detached units. About 19% were for single family attached units and 53% for apartment units. Chart 17 shows these results graphically by planning area.

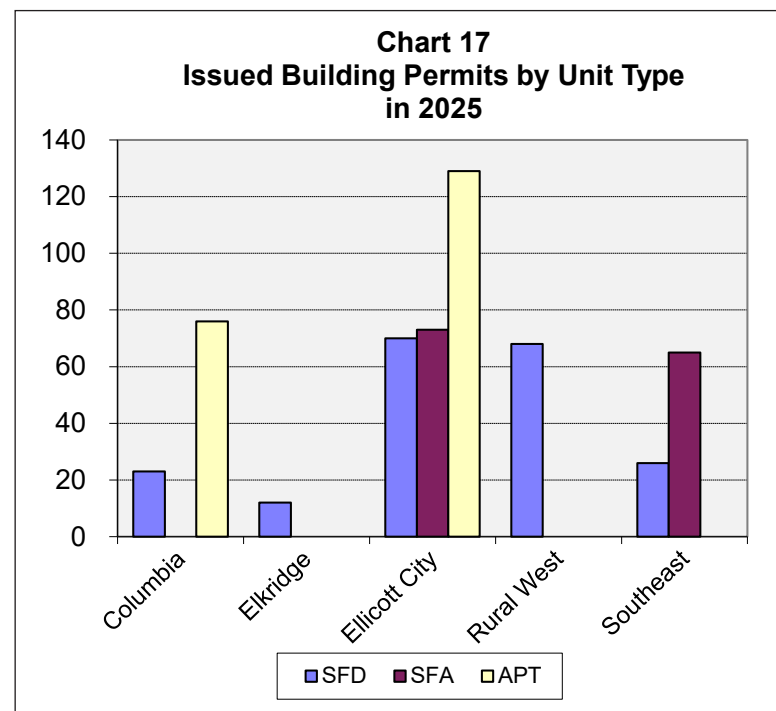


Table 27
Issued Residential Building Permits by Unit Type in 2025

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	174	0	174	24%
All Other Columbia	23	0	76	0	99	14%
Elkridge	12	0	0	0	12	2%
Ellicott City	70	73	129	0	272	38%
Rural West	68	0	0	0	68	9%
Southeast	26	65	0	0	91	13%
TOTAL	199	138	379	0	716	100%
PERCENT	28%	19%	53%	0%	100%	

Last Year's Projects - More Than 20 Units

Table 28 summarizes the issued residential building permits in larger developments with more than 20 units. About 83%, or 593 of the total 716 permits issued last year, fall into this category. Map 9 shows the locations of each of the developments.

Five Year Results

Over five years, from 2021 to 2025, a total of 4,833 residential permits have been issued in Howard County (Table 29). This is an average of 967 permits per year. Last year's 716 issued permits was 20% less than the 891 permits issued the year before and the second smallest amount of the last five years.

Of the 4,833 total permits issued over the five-year time period, 1,506, or 31%, were for single family detached units. There were 1,469 permits (30%) for single family attached units and 1,858 permits (38%) for apartment units (both rental and condo). Chart 18 shows the results by unit type graphically over time.

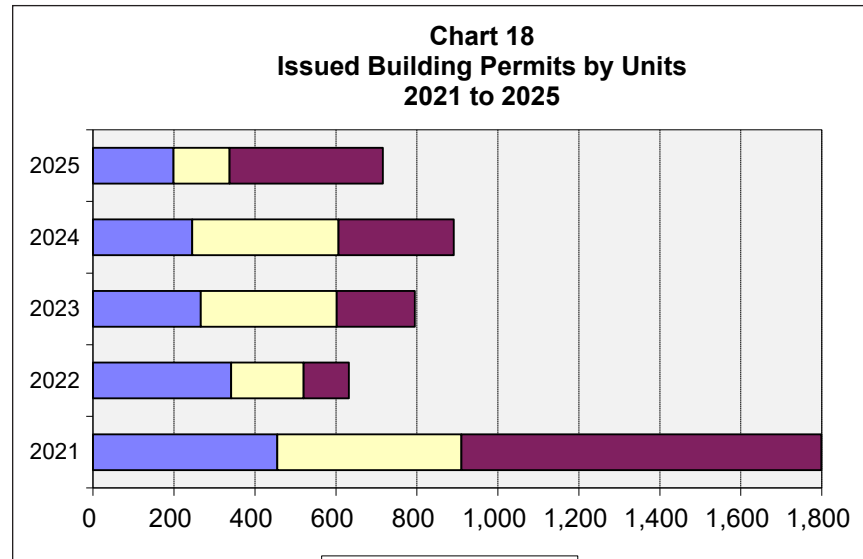
Table 28
Issued Residential Building Permits, Subdivisions With 20 or More Units in 2025

Planning Area	Subdivision	Unit Type	Units	TOTAL
Downtown Columbia	Cultural Arts Center	Apartments	174	174
Columbia	Patuxent Commons	Apartments	76	76
Ellicott City	That Place at Patapsco Park	Age Restricted Apartments	89	253
	Bethany Glen	Age Restricted Single Family Detached & Attached	60	
	Westmount	Single Family Detached	44	
	Villa Apartments at Turf Valley	Apartments	40	
	Villages at Town Square in Turf Valley	Single Family Attached	20	
Southeast	Wellington Farms	Single Family Attached	33	60
	Paddock Pointe	Single Family Attached	27	
Rural West	The Highlands	Age Restricted Single Family Detached	30	30
TOTAL				593

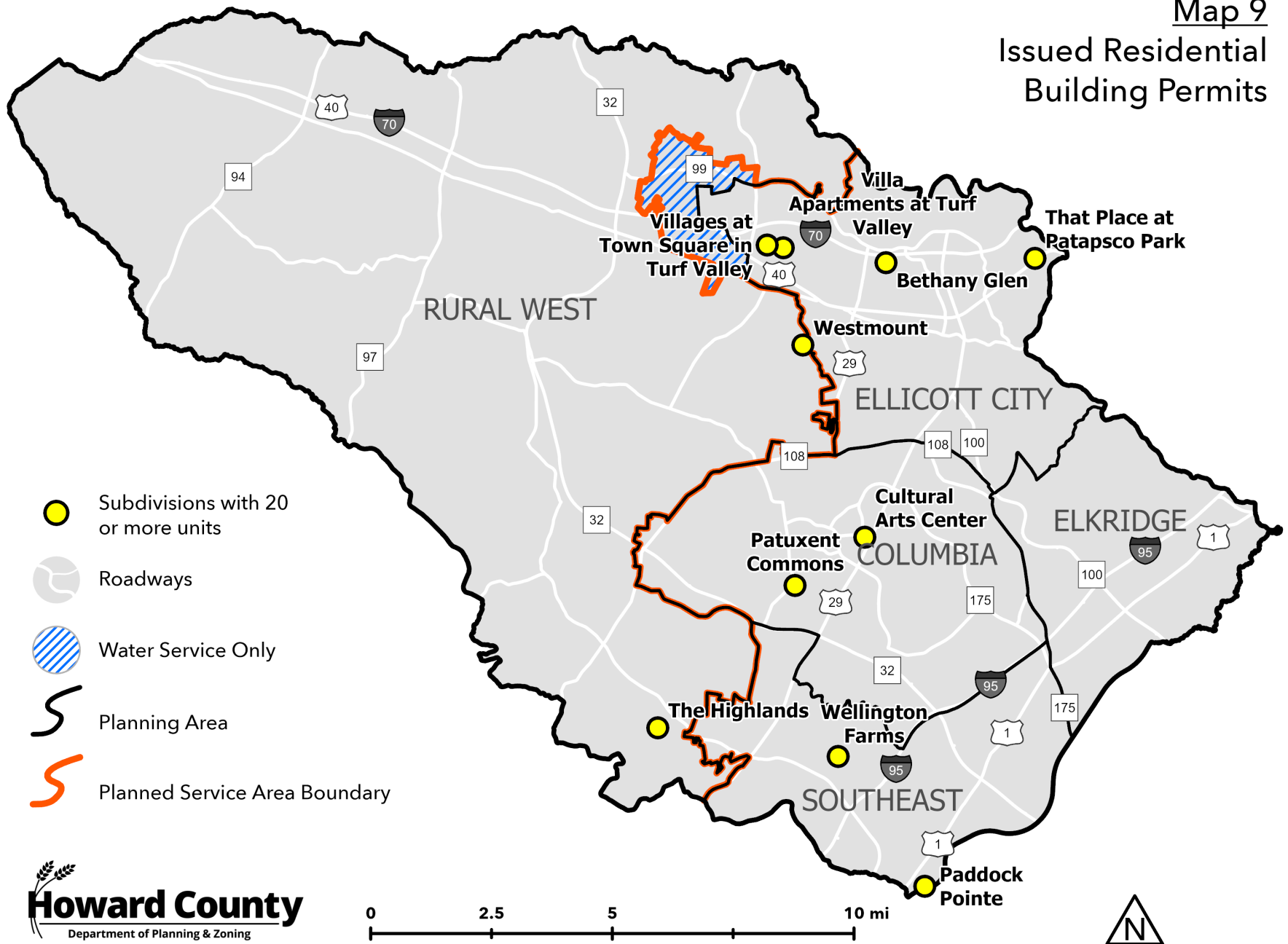
Table 29
Issued Residential Building Permits by Unit Type, 2021 to 2025

Year	SFD	SFA	APT	MH	Total
2021	455	455	889	0	1,799
2022	341	179	112	0	632
2023	266	336	193	0	795
2024	245	361	285	0	891
2025	199	138	379	0	716
TOTAL	1,506	1,469	1,858	0	4,833
PERCENT	31%	30%	38%	0.0%	100%
ANNUAL AVG.	301	294	372	0	967

Chart 18
Issued Building Permits by Units
2021 to 2025



Map 9 Issued Residential Building Permits



Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2025, to December 31, 2025, the County issued 572 use and occupancy permits (Table 30). Of all planning areas, Ellicott City had the most with 228. This is followed by the Southeast with 190, Columbia with 85, and the Rural West with 62, and Elkridge with 7. Countywide, 38% of the occupancy permits were for single family detached units, 42% were for single family attached units and 20% were for apartment units.

Table 30
Issued Use and Occupancy Permits by Unit Type in 2025

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
Columbia	9	0	76	0	85	15%
Elkridge	7	0	0	0	7	1%
Ellicott City	83	105	40	0	228	40%
Rural West	62	0	0	0	62	11%
Southeast	54	136	0	0	190	33%
TOTAL	215	241	116	0	572	100%
PERCENT	38%	42%	20%	0%	100%	

Five Year Results

From 2021 to 2025, a total of 4,925 use and occupancy permits were issued in Howard County (Table 31). This is an annual average of 985 permits per year.

Of the 4,925 total use and occupancy permits issued over the five-year timeframe, 31% were for single family detached units, 33% for single family attached units, and 36% for apartment units (both rental and condo). There were 59% less units built last year compared to the year before, 572 completions in 2025 compared to 1,381 in 2024. Last year had the smallest number of unit completions of all five years. Chart 19 shows the results by unit type graphically over time.

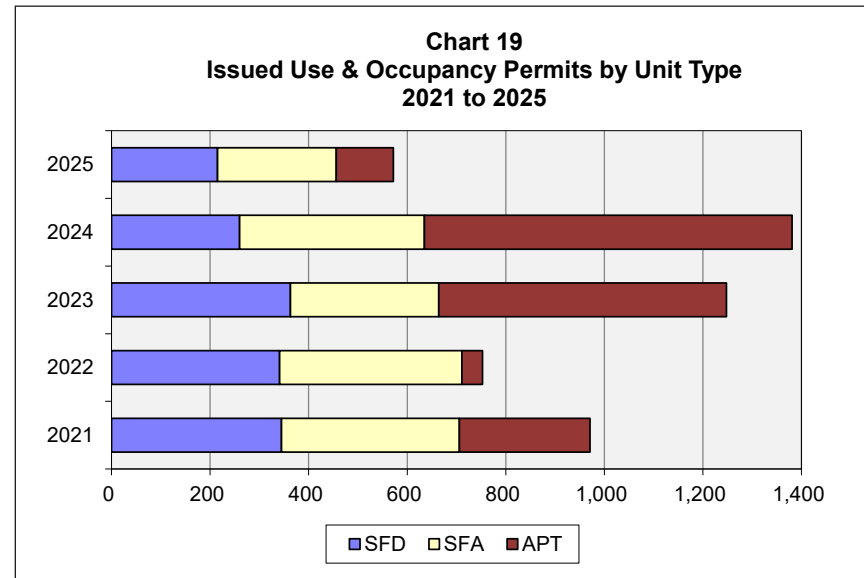


Table 31
Issued Use and Occupancy Permits by Unit Type, 2021 to 2025

Year	SFD	SFA	APT	MH	Total
2021	345	361	265	0	971
2022	341	370	42	0	753
2023	363	301	584	0	1,248
2024	260	375	746	0	1,381
2025	215	241	116	0	572
TOTAL	1,524	1,648	1,753	0	4,925
PERCENT	31%	33%	36%	0%	100%
ANNUAL AVG.	305	330	351	0	985

Age-Restricted and Moderate Income Housing Units

In response to policies initially established with the 2000 General Plan, legislation has been adopted to foster the development of age-restricted and moderate income housing units (MIHU).

Age-restricted housing can be built as a conditional use in residential zoning districts as well as by-right in the Planned Office Research (POR), Planned Senior Community (PSC), Community Center Transition (CCT) and Residential: Senior-Institutional (R-SI) districts.

The 2004 comprehensive rezoning expanded the MIHU regulations to include more zoning districts. New projects in higher density and mixed-use zones as well as all age-restricted projects must build a certain percentage of affordable units, anywhere from 5% to 15%, depending on particular criteria such as the zone, unit type and density.

The 2013 comprehensive zoning further expanded the MIHU regulations requiring a 10% moderate income unit total in the lower density zones including R-20, R-ED, R-12, R-SC, R-SA-8, RR-DEO, RC-DEO, and R-H-ED. A fee in lieu option applies.

The following summarizes recent development activity of age-restricted and MIHU units from January 1, 2025, to December 31, 2025, as well as some comparisons to the previous year reporting period.

In-Process Plans

Table 32 shows the age-restricted units from in-process plans by unit type and by planning area as of December 31, 2025. This includes both subdivision and site development plans. During this latest time period there were 1,589 age-restricted units in process. These units are from six projects—Erickson-Oxford Hills (1,200 apartment units), Elms at Elkridge (44 apartment units), Halcyon at Taylor Highlands (161 single family attached units) 5497 Waterloo Road (95 apartment units), Rockland Terrace (13 single family detached units and 50 single family attached units), and Daniels Mill Overlook (26 single family attached units). In 2024 there were 1,611 age-restricted units in process. Map 10 shows the 2025 projects.

Table 32
Age-Restricted Units from Plans in Process, 12/31/2025
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	1,200	1,200	76%
Elkridge	0	0	139	139	9%
Ellicott City	13	237	0	250	16%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	13	237	1,339	1,589	100%
PERCENT	1%	15%	84%	100%	
As of 12/31/24	65	117	1,429	1,611	

Table 33 shows the total MIHU units in process. These total 563, the greatest number of which are in Elkridge followed by the Southeast. This is about 4% less than the number in the previous year when there were 542 MIHU units in process.

Table 33
MIHU Units from Plans in Process, 12/31/2025
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia *	0	0	57	57	10%
All Other Columbia	0	0	130	130	23%
Elkridge	1	43	169	213	38%
Ellicott City	0	17	0	17	3%
Rural West	0	0	0	0	0%
Southeast	0	20	126	146	26%
TOTAL	1	80	482	563	90%
PERCENT	0%	14%	86%	100%	
As of 12/31/24	2	34	506	542	

* Includes very low and middle income units in accordance with the Downtown Columbia Plan.

Table 34 shows just the age-restricted MIHU units in process. For this year, 153 of the 563 MIHU units are age-restricted. There were 140 age-restricted MIHU units in process for the previous reporting period.

Map 10 shows the particular projects that include MIHU units. Table 38 shows the details of each of these projects.

Table 34
Age-Res. MIHU Units from Plans in Process, 12/31/2025
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	120	120	0%
Elkridge	0	0	16	16	0%
Ellicott City	0	17	0	17	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	17	136	153	0%
PERCENT	0%	0%	0%	0%	
As of 12/31/24	0	0	140	140	

Approved Site Development Plans

Table 35 shows the age-restricted units in site development plans that were approved between January 1, 2025, and December 31, 2025, with comparisons to the previous year. There were 258 approved age-restricted units in 2025 and 141 approved the previous year in 2024.

Table 36 shows the MIHU units in approved site development plans. A total of 17 units were approved in 2025, all in Ellicott City. This compares to 103 MIHU units approved in 2024. As shown in Table 37, three of the 17 in 2025 were for age restricted units. Map 11 shows the approved projects with MIHU units, and Table 39 shows the plan details.

Table 35
Age-Restricted Units from Approved Plans in 2025
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	25	0	0	25	10%
Elkridge	24	0	0	24	9%
Ellicott City	13	113	83	209	81%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	62	113	83	258	100%
PERCENT	24%	44%	32%	100%	
Year 2024	64	34	43	141	

Table 36
MIHU Units from Approved Plans in 2025
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	4	13	17	100%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	4	13	17	100%
PERCENT	0%	24%	76%	100%	
Year 2024	0	4	99	103	

Table 37
Age-Res. MIHU Units from Approved Plans in 2025
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City *	0	0	3	3	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	0	3	3	0%
PERCENT	0%	0%	0%	0%	
Year 2024	0	0	0	0	

* This is a LIHU at That Place at Patapsco Park

Table 38
In Process Plans With MIHU and Age-Restricted Units On December 31, 2025

Plan Name	File Number	Zoning	MIHU Units												Market Rate Age-Restricted Units			
			Not Age-Restricted				Age-Restricted				Total MIHU				Age-Restricted Units			
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
10010 Junction Drive	S-23-004	TOD	0	0	98	98	0	0	0	0	0	0	98	98	0	0	0	0
Erickson - Oxford Hills	F-24-059	CEF	0	0	0	0	0	0	92	92	0	0	92	92	0	0	834	834
Lakefront North - DT Columbia *	SDP-22-042	NT	0	0	57	57	0	0	0	0	0	0	57	57	0	0	0	0
O'Donnell Properties	SDP-23-013	TOD	0	0	43	43	0	0	0	0	0	0	43	43	0	0	0	0
Elms at Elkridge	SDP-25-048	CEF	0	0	35	35	0	0	6	6	0	0	41	41	0	0	38	38
Weinman Apartments	S-25-002	CAC-CLI	0	0	39	39	0	0	0	0	0	0	39	39	0	0	0	0
Dorsey Business Center Parcel A	SDP-26-002	TOD	0	0	36	36	0	0	0	0	0	0	36	36	0	0	0	0
Erickson - Oxford Hills	SDP-24-031	CEF	0	0	0	0	0	0	28	28	0	0	28	28	0	0	246	246
Corridor Road Apartments Station Overlook	SDP-24-019	TOD	0	0	28	28	0	0	0	0	0	0	28	28	0	0	0	0
Brompton 3 (Blue Stream)	SDP-25-028	CAC	0	20	0	20	0	0	0	0	0	20	0	20	0	0	0	0
Paddock Pointe - Phase 5A	SDP-26-009	TOD	0	20	0	20	0	0	0	0	0	20	0	20	0	0	0	0
Halcyon at Taylor Highlands	SDP-26-028	POR	0	0	0	0	0	17	0	17	0	17	0	17	0	144	0	144
Elms at Elkridge	SDP-25-047	CEF	0	13	0	13	0	0	0	0	0	13	0	13	0	0	0	0
5497 Waterloo Road	SDP-24-044	POR	0	0	0	0	0	0	10	10	0	0	10	10	0	0	85	85
Fall River Terrace Apartments	SDP-26-014	NT	0	0	10	10	0	0	0	0	0	0	10	10	0	0	0	0
Elkridge Crossing 2, Section 4, Area 1	SDP-25-008	CAC-CLI	0	7	0	7	0	0	0	0	0	7	0	7	0	0	0	0
Elkridge Crossing 2, Section 4, Area 2	SDP-25-014	CAC-CLI	0	3	0	3	0	0	0	0	0	3	0	3	0	0	0	0
Harwood Park	SDP-24-016	R-12	1	0	0	1	0	0	0	0	1	0	0	1	0	0	0	0
Rockland Terrace	SDP-25-043	R-20	0	0	0	0	0	0	0	0	0	0	0	0	13	50	0	63
Daniels Mill Overlook	SDP-26-025	R-20	0	0	0	0	0	0	0	0	0	0	0	0	0	26	0	26
TOTAL			1	63	346	410	0	17	136	153	1	80	482	563	13	220	1,203	1,436

* Includes very low and middle income units in accordance to the Downtown Columbia Plan.

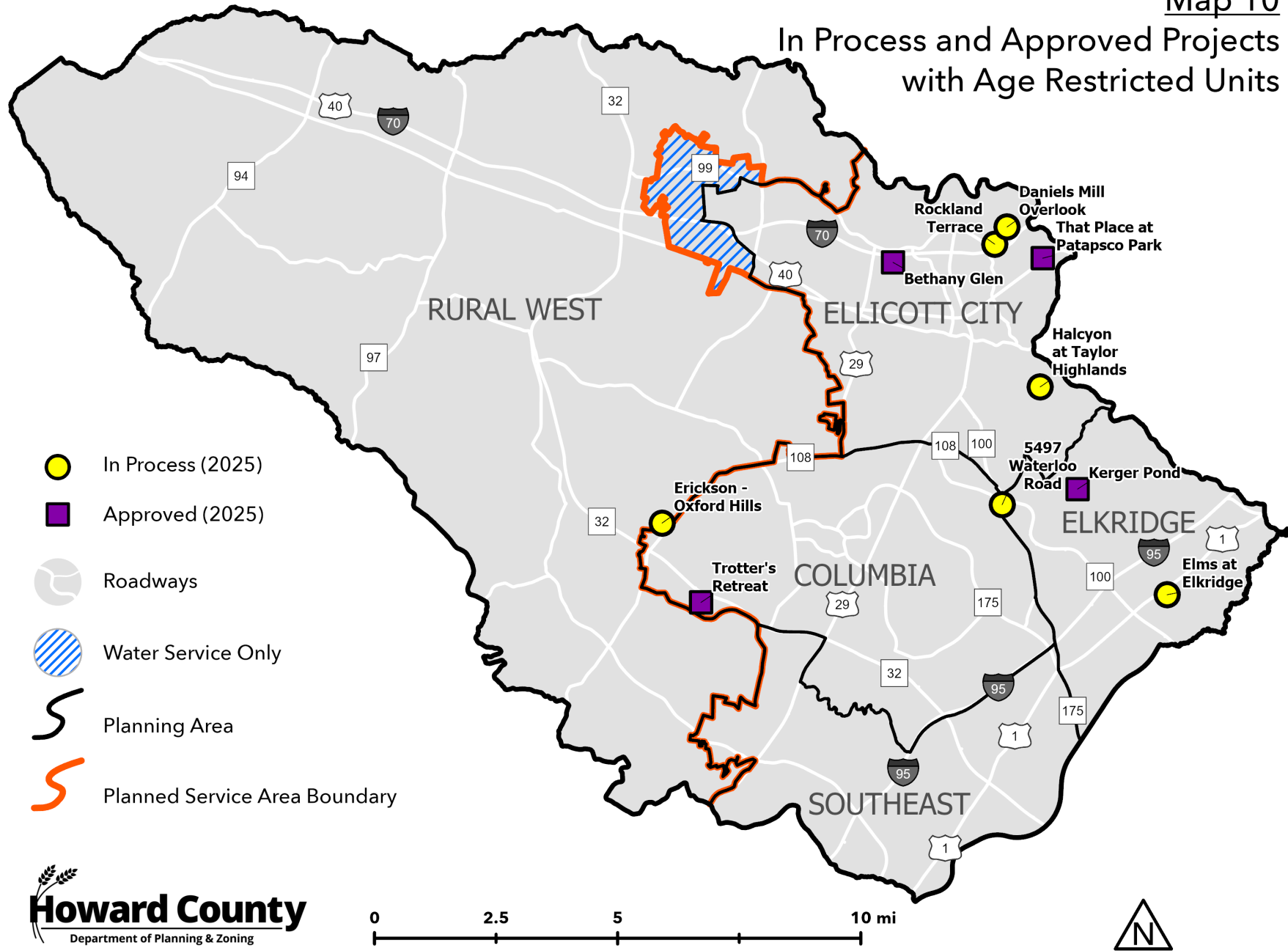
Table 39
Approved Site Development Plans with MIHU and Age-Restricted Units in 2025

Plan Name	File Number	Zoning	MIHU Units												Market Rate Age-Restricted Units			
			Not Age-Restricted				Age-Restricted				Total MIHU				Age-Restricted Units			
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
Crestview at Taylor Highlands	SDP-24-034	R-A-15	0	4	10	14	0	0	0	0	0	4	10	14	0	0	0	0
That Place at Patapsco Park *	SDP-23-039	POR	0	0	0	0	0	0	3	3	0	0	3	3	0	0	80	80
Bethany Glen	SDP-24-020	R-20	0	0	0	0	0	0	0	0	0	0	0	0	13	75	0	88
Bethany Glen	SDP-22-021	R-20	0	0	0	0	0	0	0	0	0	0	0	0	0	38	0	38
Trotter's Retreat	SDP-24-017	R-20	0	0	0	0	0	0	0	0	0	0	0	0	25	0	0	25
Kerger Pond	SDP-24-018	R-20	0	0	0	0	0	0	0	0	0	0	0	0	24	0	0	24
TOTAL			0	4	10	14	0	0	3	3	0	4	13	17	62	113	80	255

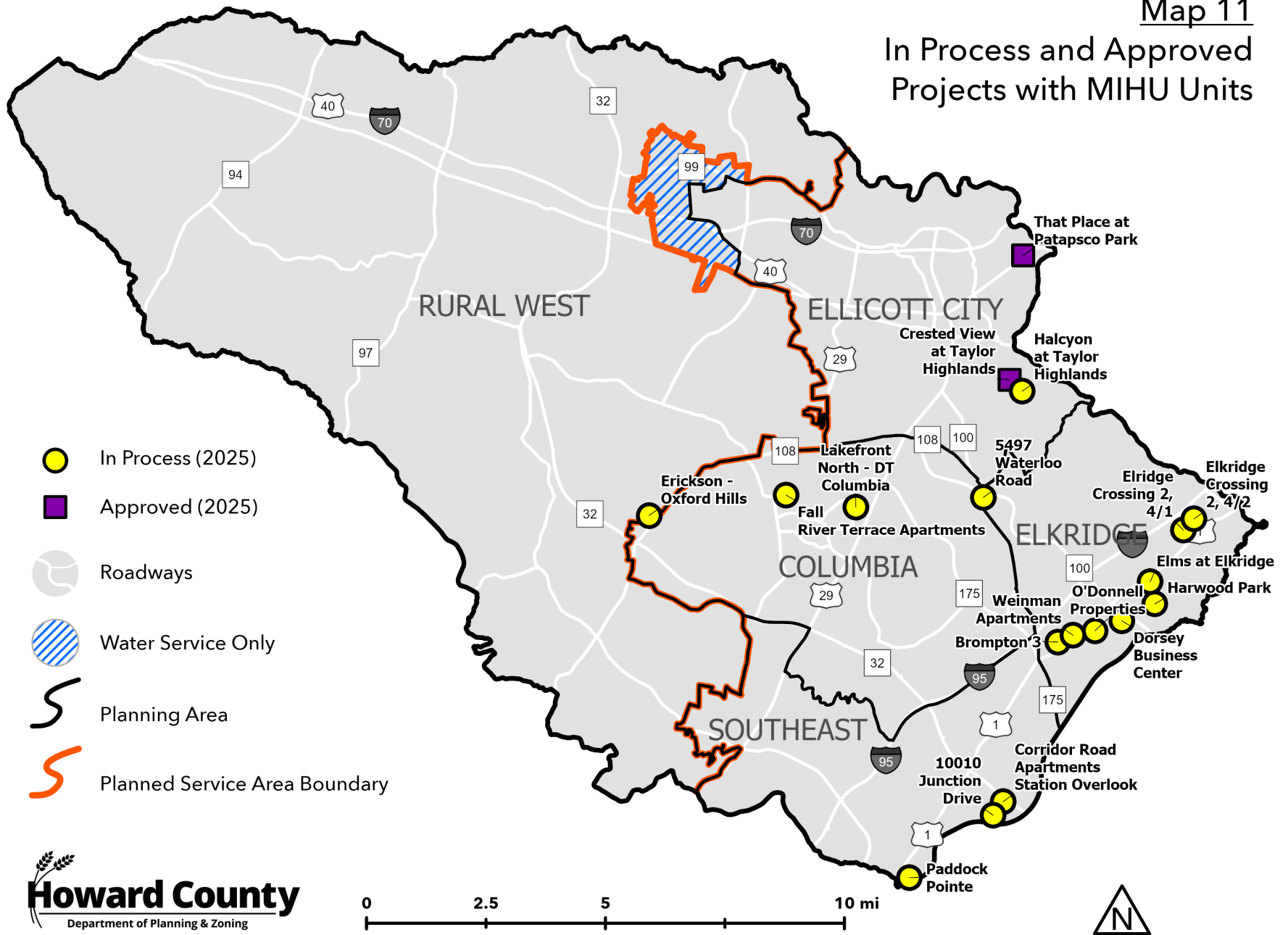
* Low Income Housing Units (LIHU)

Map 10

In Process and Approved Projects with Age Restricted Units



Map 11 In Process and Approved Projects with MIHU Units



Use & Occupancy Permits

Table 40 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2025, and December 31, 2025, 92 age-restricted units were built, 16% of the total 572 housing units built in the County over this latest reporting period.

There were 37 more age-restricted units built in the current reporting period compared to the previous period when there were 55 units built. The 2025 annual amount of 92 units built is the eighth smallest number built since 2004, the time when legislation was adopted enabling increased opportunities to build age-restricted units.

The 2005 DMS was the first time age-restricted units were reported. This was soon after the time the County had adopted regulatory changes enabling more of these types of units. In the last 20 years, 14% of all new homes built in Howard County have been age-restricted. This is summarized in Table 41.

Table 40
Age-Restricted Units Built in 2025
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	16	33	0	49	53%
Rural West	27	0	0	27	29%
Southeast	7	9	0	16	17%
TOTAL	50	42	0	92	100%
PERCENT	54%	46%	0%	100%	
Year 2024	18	37	0	55	

Table 41
Age-Restricted Units Built Compared to Total Units, 10/01/04 to 12/31/25

Planning Area	SFD	SFA	APT	TOTAL	Total All Units Built	Age-Restricted % of Total
10/04 to 9/05	22	171	291	484	1,650	29%
10/05 to 9/06	35	233	369	637	1,877	34%
10/06 to 9/07	10	168	196	374	1,202	31%
10/07 to 9/08	7	105	130	242	1,602	15%
10/08 to 9/09	0	75	171	246	1,132	22%
10/09 to 12/10 *	0	132	118	250	1,427	18%
01/11 to 12/11	6	46	182	234	1,647	14%
01/12 to 12/12	34	62	115	211	1,220	17%
01/13 to 12/13	37	36	48	121	1,545	8%
01/14 to 12/14	41	56	113	210	1,829	11%
01/15 to 12/15	48	72	48	168	1,798	9%
01/16 to 12/16	89	64	181	334	1,263	26%
01/17 to 12/17	29	47	48	124	2,147	6%
01/18 to 12/18	0	35	48	83	1,612	5%
01/19 to 12/19	1	21	48	70	1,131	6%
1/20 to 12/20	0	0	32	32	1,812	2%
1/21 to 12/21	0	8	32	40	971	4%
1/22 to 12/22	0	15	0	15	753	2%
1/23 to 12/23	2	44	0	46	1,248	4%
1/24 to 12/24	18	37	0	55	1,381	4%
1/25 to 12/25	50	42	0	92	572	16%
TOTAL	429	1,469	2,170	4,068	29,819	14%
PERCENT	11%	36%	53%	100%		

* Extra quarter included due to change in analysis timeframe.

Non-Residential Development

Non-Residential Subdivisions

For this report, non-residential development is also tabulated by Planning Area. The number of non-residential plans, lots created, and acres of plans recorded and in-process have been compiled for each of these areas and are discussed below. The analysis includes last year’s subdivision activity as well as total activity including the previous five years.

Recorded Plans

For the latest reporting period there was a net consolidation of one lot in 4 non-residential subdivision plans were recorded totaling 68 acres (Table 42). It should be noted that these may be resubdivisions that do not create new lots, but simply create new easements. Also, some may be parcel consolidations where the net number of lots get reduced.

Table 42
Recorded Non-Residential Subdivisions in 2025

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	0	0%	2	50%	51	75%
Elkridge	0	0%	0	0%	0	0%
Ellicott City	0	0%	0	0%	0	0%
Rural West	(1)	0%	0	0%	0	0%
Southeast	0	0%	2	50%	17	25%
TOTAL	(1)	0%	4	100%	68	100%

Table 43 shows the recorded non-residential subdivisions from January 1, 2021 to December 31, 2025. Over this five-year period there were 58 non-residential lots recorded Countywide in 46 subdivision plans totaling 508 acres. This amounts to an annual average over the five-year analysis time period of 12 lots in 9 plans encompassing 102 acres.

Table 43
Recorded Non-Residential Subdivisions, 2021 to 2025

Countywide	Lots	Plans	Acreage
2021	19	13	170
2022	22	13	182
2023	14	12	78
2024	4	4	10
2025	(1)	4	68
TOTAL	58	46	508
ANNUAL AVG.	12	9	102

In-Process Plans

Countywide, there were 22 non-residential subdivision plans in process as of December 31, 2025. This compares to 25 plans in process for the previous reporting period (Table 44). Six plans were in Ellicott City, 5 plans each in Columbia and the Rural West, 3 plans in the Southeast, 2 plans in Elkridge, and no plans in Downtown Columbia. All of the plans were in either the final plan or environmental concept plan stage.

Table 45 shows the number of potential non-residential lots in process. As of December 31, 2025, there were 12 lots in process, compared to 6 in process on December 31, 2024. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There was a total of 98 non-residential acres in the subdivision process as of December 31, 2025 (Table 46). This compares to 28 acres in process one year earlier. For the current year the greatest acreage amount is in Columbia (64 acres). This is followed by 13 acres in Ellicott City, 11 acres in Downtown Columbia, and 4 acres in the Southeast. There were no non-residential subdivisions in process in Elkridge and the Rural West.

Table 44
Number of Non-Residential Plans in Process, 12/31/25
with Comparisons to 12/31/2024 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Downtown Columbia	0	0	0	0	1	1
All Other Columbia	2	0	0	0	3	5
Elkridge	2	0	0	0	0	2
Ellicott City	5	0	0	0	1	6
Rural West	5	0	0	0	0	5
Southeast	2	0	0	0	1	3
TOTAL	16	0	0	0	6	22
12/31/24 Total	22	0	0	0	3	25

Table 45
Non-Residential Lots from Subdivision Plans in Process, 12/31/2025
with Comparisons to 12/31/2024 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Downtown Columbia	0	0	0	3	3
All Other Columbia	0	0	0	6	6
Elkridge	0	0	0	0	0
Ellicott City	0	0	0	1	1
Rural West	0	0	0	0	0
Southeast	0	0	0	2	2
TOTAL	0	0	0	12	12
12/31/24 Total	0	0	0	6	6

Table 46
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2025
with Comparisons to 12/31/2024 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Downtown Columbia	0	0	0	11	11
All Other Columbia	0	0	0	64	64
Elkridge	0	0	0	0	0
Ellicott City	0	0	0	13	13
Rural West	0	0	0	0	0
Southeast	0	0	0	4	4
TOTAL	0	0	0	92	92
12/31/24 Total	0	0	0	28	28

Approved Non-Residential Site Development Plans

The site development plan (SDP) process follows lot creation and is a better gauge of non-residential development activity than subdivision. Once a SDP is approved, construction permits can be issued after which actual land development can begin. Similar to subdivision activity, non-residential site development activity is tabulated by Planning Area. The number of non-residential site development plans approved, the building square footage, and the acreage of approved plans have been compiled for each Planning Area. The analysis includes last year's site development plan activity as well as activity for the previous four reporting periods.

Summary of Last Year

For the latest reporting period, a total of 239,220 square feet were approved in 17 site development plans on 115 acres (Table 47). The greatest amount of square footage approved was in the Southeast, followed by Columbia, and a small amount in Ellicott City. There was no approved square footage in Downtown Columbia, Elkridge, and the Rural West.

Table 48 shows the approved square footage by building type. A total of 110,414 square feet, about 46% of the total, are for government and institutional uses located in the Southeast and Columbia. About 74,433 square feet, 31% of the total, is for office/service space, most of which is in the Southeast. Manufacturing/extensive industrial uses total 31,712 square feet, all located in the Southeast. Total retail uses amount to 20,136 square feet, about 8% of the total. Chart 20 shows this graphically.

Table 48
Building Square Feet in Approved Non-Residential Site Development Plans in 2025

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	0	0	0	0	0	0
All Other Columbia	15,443	0	0	95,914	0	111,357
Elkridge	0	0	0	0	0	0
Ellicott City	4,693	6,273	0	0	0	10,966
Rural West	0	0	0	0	0	0
Southeast	0	68,160	31,712	14,500	2,525	116,897
TOTAL	20,136	74,433	31,712	110,414	2,525	239,220
PERCENT	8.4%	31.1%	13.3%	46.2%	1.1%	100.0%

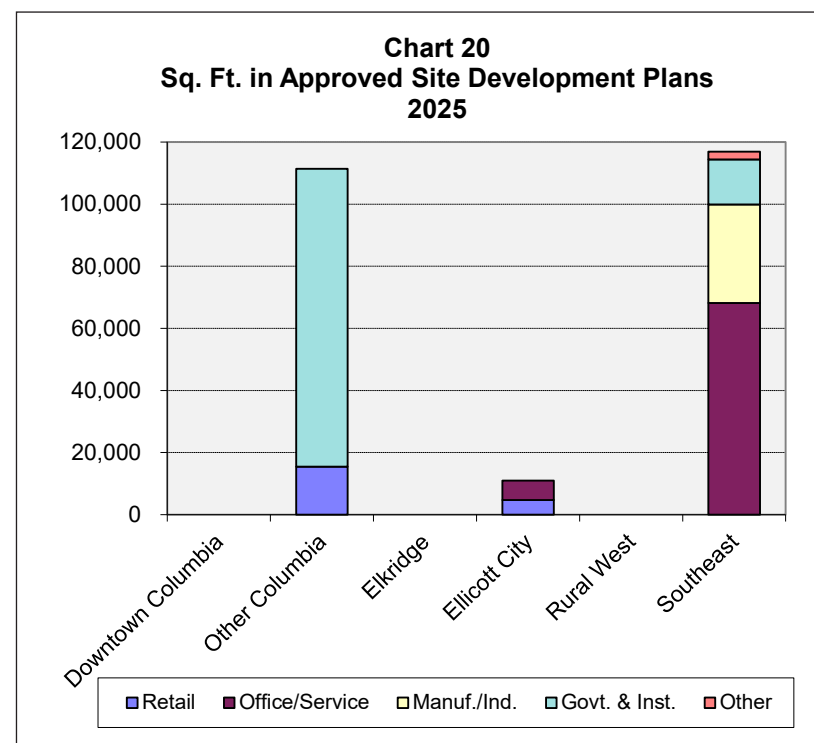


Table 47
Approved Non-Residential Site Development Plans in 2025

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	111,357	47%	7	41%	68	59%
Elkridge	0	0%	0	0%	0	0%
Ellicott City	10,966	5%	4	24%	8	7%
Rural West	0	0%	1	6%	17	14%
Southeast	116,897	49%	5	29%	23	20%
TOTAL	239,220	100%	17	100%	115	100%

Last Year’s Projects - Greater than 20,000 Square Feet

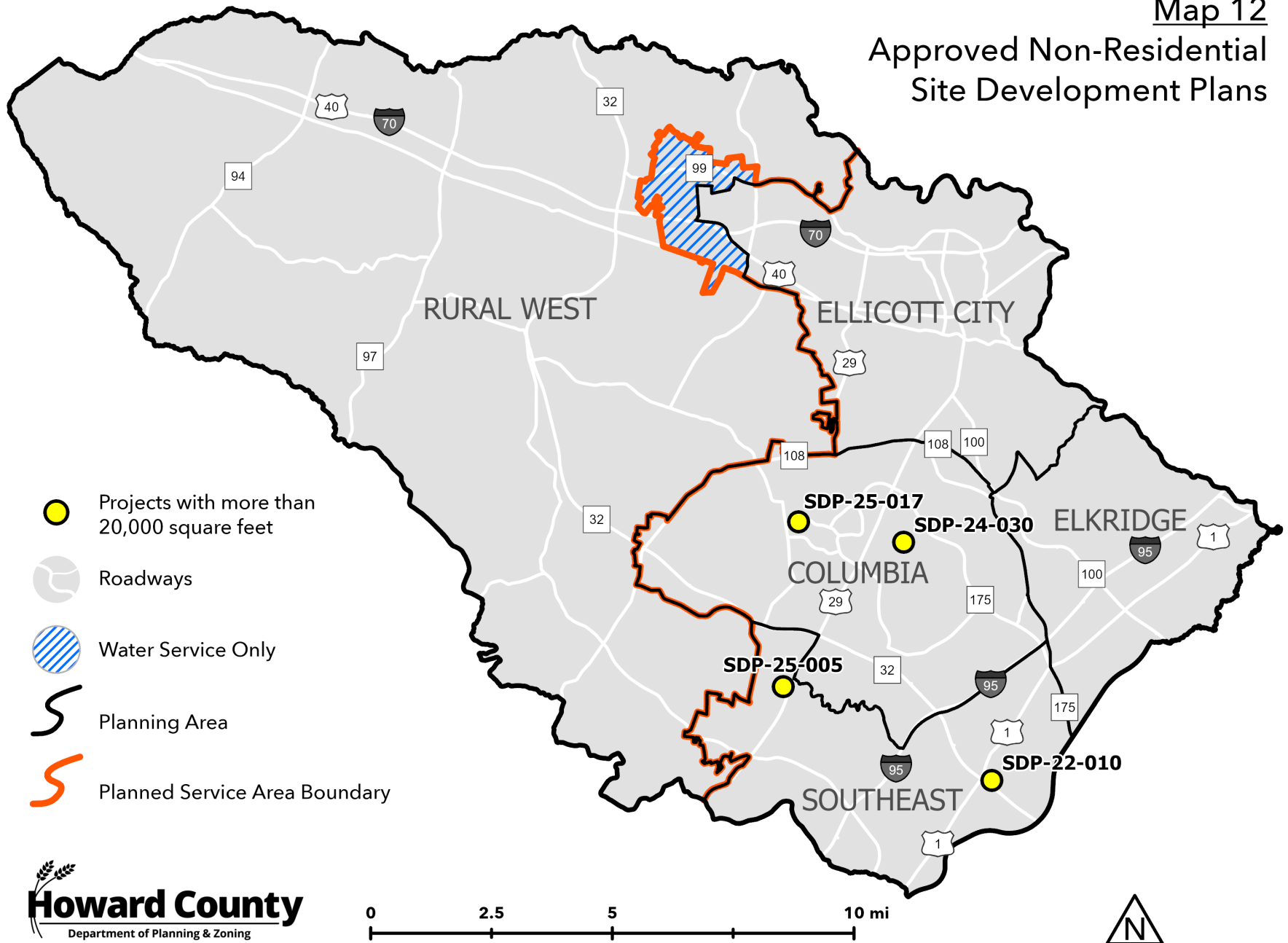
Of the 239,220 square feet of non-residential building space approved in site development plans last year, 4 plans had more than 20,000 square feet. These larger plans, shown in Table 49, account for 74% of the total square footage approved last year. The locations of this plan are shown on Map 12.

These larger plans include a new 51,000 square foot Workforce Development and Trade Center at the Howard Community College, a new 37,700 addition as part of the renovation of Oakland Mills Middle School, a new 68,200 square foot office building in the Montpelier Research Park, and a new 20,000 square foot warehouse for use at Denner Concrete.

Table 49
Projects With More than 20,000 Square Feet in Approved Non-Residential Site Development Plans in 2025

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-25-017	HCC Workforce Development & Trade Center	HCC Building	51,000	88,718
	SDP-24-030	Oakland Mills Middle School	School Addition	37,718	
Southeast	SDP-25-005	Montpelier Research Park	Office Building	68,160	88,160
	SDP-22-010	Drenner Concrete	Warehouse	20,000	
TOTAL					176,878

Map 12
Approved Non-Residential
Site Development Plans



Five Year Results

Table 50 shows the Countywide approved non-residential site development plans for the last five reporting periods from January 1, 2021 to December 31, 2025. Over this five year timeframe there were 83 plans approved on 1,384 acres including about 2 million square feet of building space. This equates to an annual average of about 406,000 square feet of new building space approved per year.

Last year, with about 239,220 square feet of approved space, was less than the 330,615 square feet approved the year before, and is the smallest of all five years. Chart 21 depicts these annual amounts.

Table 51 shows the five-year history by building type. Over the five years, about 34% of the total 2 million square feet was for government and institutional uses and 32% for manufacturing/extensive industrial uses. About 29% was for office/service uses, 4% for retail uses and less than 1% for other uses.

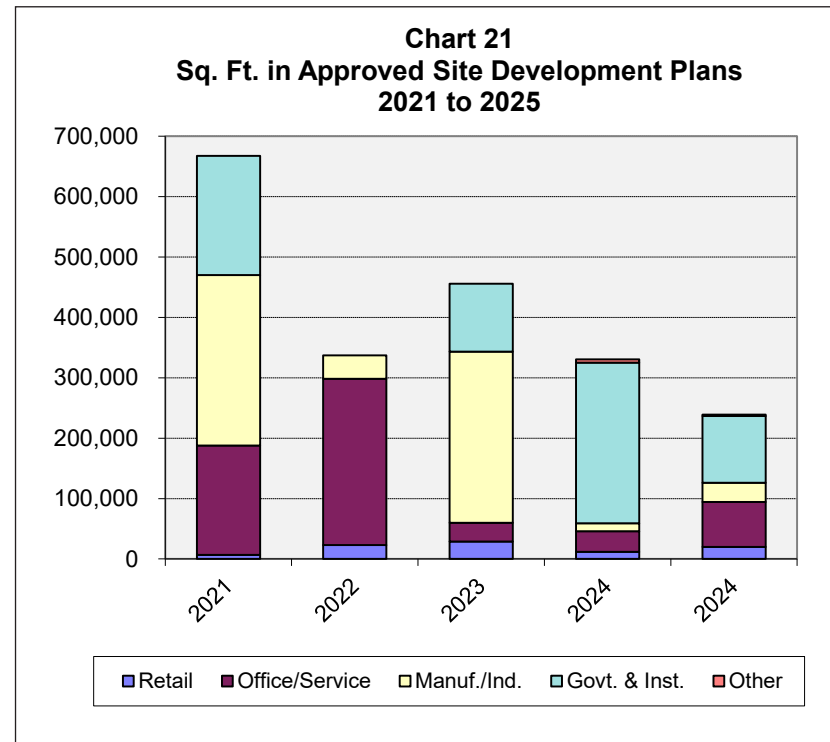


Table 50
Approved Non-Residential Site Development Plans
2021 to 2025

Year	Square Feet	Number or Plans	Acreage
2021	667,779	18	375
2022	337,135	17	256
2023	455,749	14	335
2024	330,615	17	303
2025	239,220	17	115
TOTAL	2,030,498	83	1,384
ANNUAL AVG.	406,100	17	277

Table 51
Building Square Feet in Approved Non-Residential Site Development Plans
2021 to 2025

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
2021	6,756	180,973	282,364	197,686	0	667,779
2022	23,135	275,400	38,600	0	0	337,135
2023	28,988	30,784	283,497	112,480	0	455,749
2024	11,735	34,110	13,270	266,000	5,500	330,615
2024	20,136	74,433	31,712	110,414	2,525	239,220
TOTAL	90,750	595,700	649,443	686,580	8,025	2,030,498
PERCENT	4.5%	29.3%	32.0%	33.8%	0.4%	100.0%

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of December 31, 2025, are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 38 non-residential site development plans in process as of December 31, 2025. These plans include about 1.7 million square feet of building space covering 629 acres. This compares to about 430,000 square feet in 36 plans on 348 acres that were in process the previous year (on December 31, 2024).

As shown in Table 52, the Southeast had the most square footage in process, followed by Columbia and then Elkridge. Table 53 shows a more detailed breakdown of square footage by building type. About 1.4 million square feet are for manufacturing/extensive industrial uses, 238,000 square feet for government and institutional uses, 65,000 square feet for office/service uses, and 50,000 square feet for retail uses.

Projects 20,000 Square Feet or More

Table 54 shows site development plans with buildings 20,000 square feet or more. Map 13 shows the locations of these projects. These projects account for about 92% of the total 1.7 million square feet in process.

Table 52
In-Process Non-Residential Site Development Plans, 12/31/25
with Comparisons to Countywide In-Process on 12/31/24

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	19,013	1%	1	3%	11	2%
All Other Columbia	549,366	32%	10	26%	132	21%
Elkridge	386,967	23%	7	18%	194	31%
Ellicott City	140,735	8%	2	5%	3	0%
Rural West	66,167	4%	14	37%	235	37%
Southeast	554,420	32%	4	11%	53	9%
TOTAL	1,716,668	100%	38	100%	629	100%
12/31/2024	430,460		36		348	

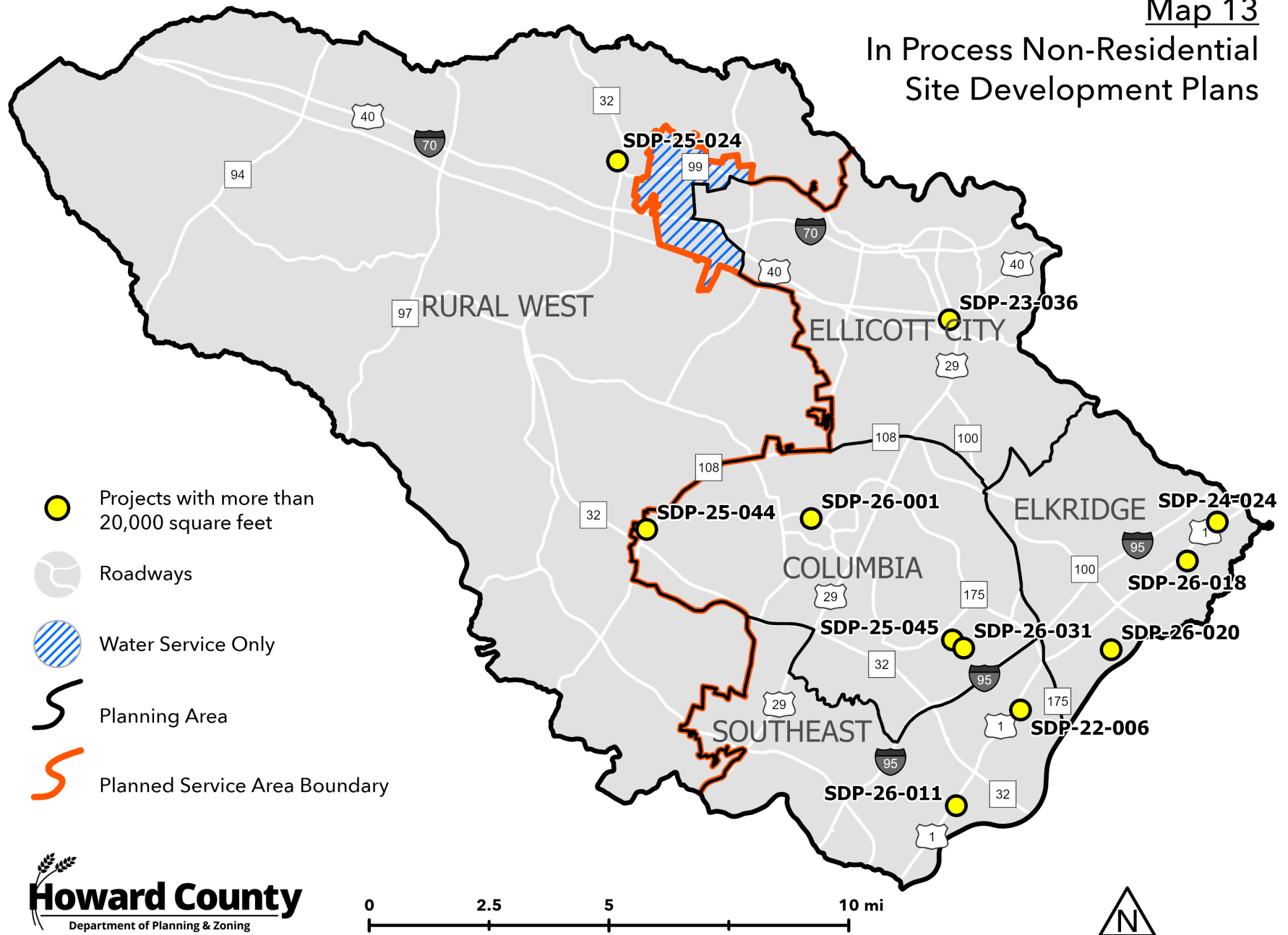
Table 53
Building Square Feet in In-Process Site Development Plans, 12/31/25
with Comparisons to Countywide In-Process on 12/31/24

Region	Retail	Office/		Govt.		TOTAL
		Service	Manuf./ Ext. Ind.	& Inst.	Other	
Downtown Columbia	19,013	0	0	0	0	19,013
All Other Columbia	16,917	24,676	421,796	85,977	0	549,366
Elkridge	0	7,320	257,900	121,747	0	386,967
Ellicott City	5,015	0	135,720	0	0	140,735
Rural West	9,337	21,218	0	30,712	4,900	66,167
Southeast	0	11,955	542,465	0	0	554,420
TOTAL	50,282	65,169	1,357,881	238,436	4,900	1,716,668
PERCENT	2.9%	3.8%	79.1%	13.9%	0.3%	100.0%
12/31/2024	44,931	46,458	179,022	152,624	7,425	430,460

Table 54
Projects With More Than 20,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/25

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-26-031	Gateway Commerce Center Parcel A-10	Warehouse/Office	232,557	516,538
	SDP-25-045	Commerce Center Drive	Warehouse	189,239	
	SDP-26-001	The Source Community Center	Community Center	60,180	
	SDP-25-044	Clarksville Commons II	Retail/Day Care/Office	34,562	
Elkridge	SDP-26-020	Maryland 95 Logistics Park Building 1	Warehouse	243,600	356,427
	SDP-24-024	Maryland International School	School Addition	64,485	
	SDP-26-018	Elkridge Community Center and 50 Plus Center	Community and Senior Center	48,342	
Ellicott City	SDP-23-036	Public Storage	Self-Storage Building	135,720	135,720
Rural West	SDP-25-024	Holy Korean Martyrs Catholic Church	Church	23,266	23,266
Southeast	SDP-26-011	Tradepoint Atlantic	Warehouse	519,163	542,465
	SDP-22-006	Life Storage	Self-Storage Building	23,302	
TOTAL					1,574,416

Map 13 In Process Non-Residential Site Development Plans



Non-Residential Building Permits

The final stage of the development process is the issuance of building permits. As indicated earlier, in Howard County building permits are required for all new construction. This section of the report tabulates building permits for all new non-residential construction. The number of permits issued as well as the associated square footage by building type have been compiled by planning area. This data comes from the Howard County Department of Inspections, Licenses and Permits.

Summary of Last Year

For the latest reporting period, from January 1, 2025, to December 31, 2025, 22 permits were issued for about 167,000 square feet in non-residential building space (Table 55). The greatest amount of square footage was in the Columbia, followed by the Southeast, and then the Rural West.

Table 55
Issued Non-Residential Building Permits in 2025

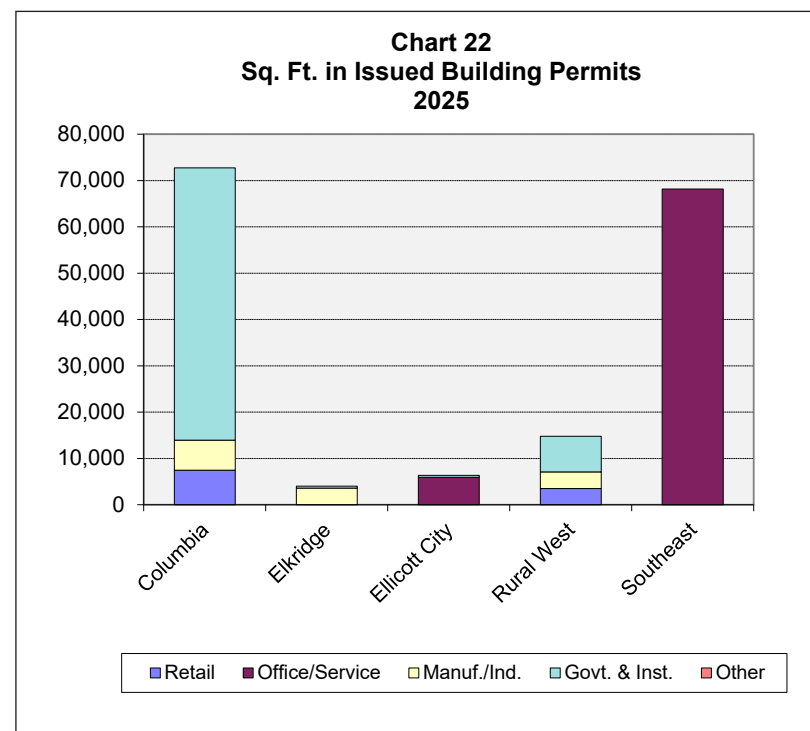
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Downtown Columbia	900	1%	1	5%
Columbia	72,725	44%	9	41%
Elkridge	4,000	2%	5	23%
Ellicott City	6,333	4%	2	9%
Rural West	14,785	9%	3	14%
Southeast	68,160	41%	2	9%
TOTAL	166,903	100%	22	100%

Table 56 shows the approved square footage by building type. About 68,000 square feet, 41% of the total, are for government and institutional uses, most all of which is in Columbia. Another 44%, about 74,000 square feet, are for office/service uses. About 8% of the total, or 14,000 square feet, are for manufacturing/extensive industrial uses, and close to 11,000 square feet, 7%, are for retail uses. Chart 15 shows this breakdown graphically by Planning Area.

Table 56
Building Square Feet in Issued Non-Residential Building Permits in 2025

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	0	0	0	900	0	900
Columbia	7,472	0	6,500	58,753	0	72,725
Elkridge	0	0	3,600	400	0	4,000
Ellicott City	0	5,933	0	400	0	6,333
Rural West	3,501	0	3,600	7,684	0	14,785
Southeast	0	68,160	0	0	0	68,160
TOTAL	10,973	74,093	13,700	68,137	0	166,903
PERCENT	6.6%	44.4%	8.2%	40.8%	0.0%	100.0%

Chart 22
Sq. Ft. in Issued Building Permits 2025



Last Year's Projects - Greater than 10,000 Square Feet

Of the 167,000 total square feet of non-residential building space in issued permits over the current reporting period, a little over 148,000 square feet, 89% of the total, were in projects larger than 5,000 square feet. These projects are shown in Table 57. The locations of these buildings are shown on Map 14.

The largest non-residential construction project last year was for a new 51,100 square foot workforce development and trade center building at Howard Community College in Columbia. Also in Columbia, is a new Chick-Fil-A restaurant, and small storage building at the Chesapeake Seventh Day Adventist Church and a new classroom building at Atholton Adventist.

In Ellicott City, a permit was issued for a new 6,000 square foot carwash, Auto Spa Express.

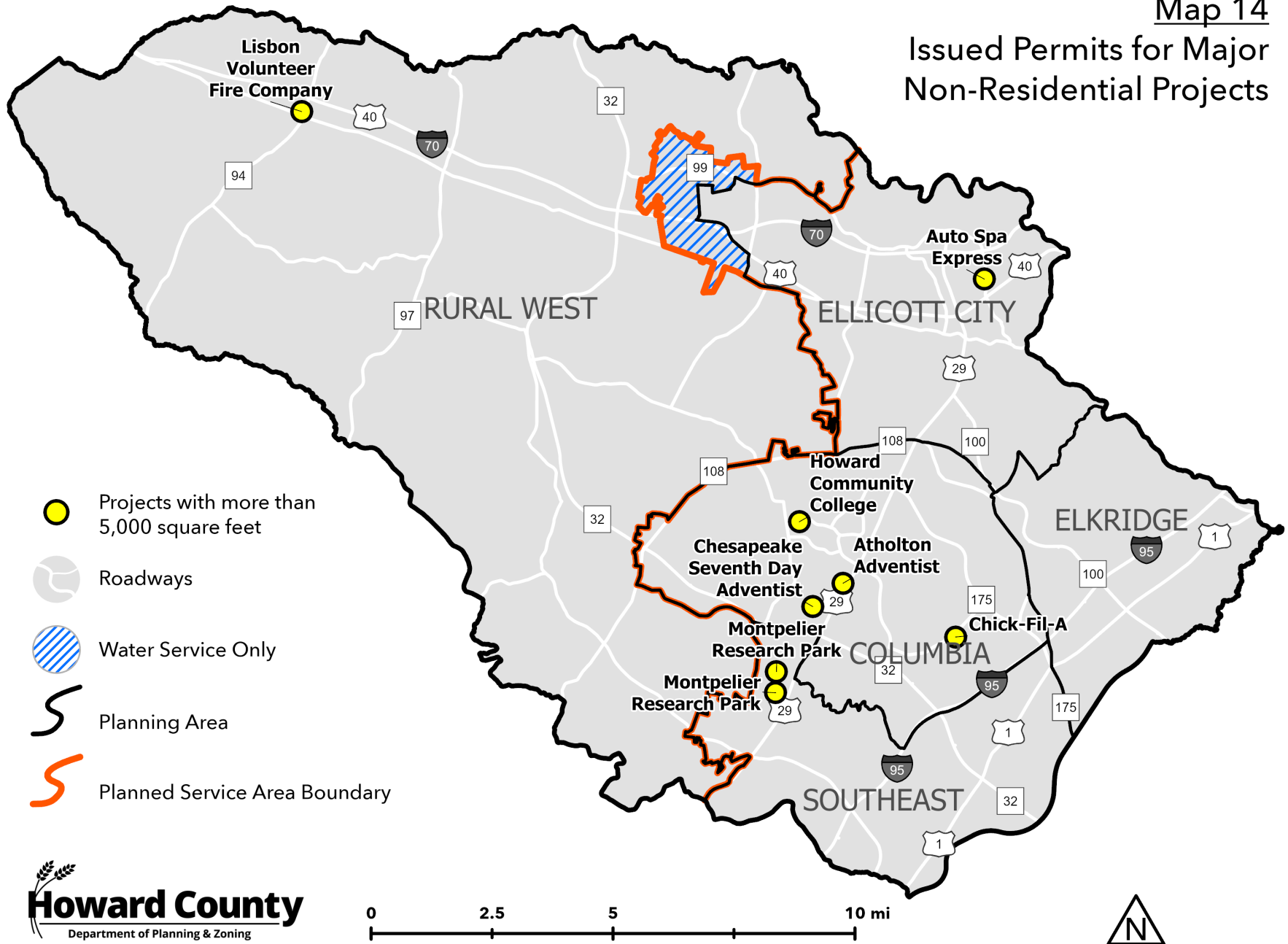
A new 7,700 square foot banquet hall was permitted for construction at the Lisbon Fire Station in the Rural West.

Two new moderately sized office buildings, 37,200 square feet and 27,200 square feet, received building permits in the Montpelier Research Park in the Southeast.

Table 57
Building Permits Issued for Major Non-Residential Projects With More Than 5,000 Square Feet in 2025

Region	Name	Proposed Use	Square Feet	TOTAL
Columbia	Howard Community College	Workforce Development & Trade Center	51,089	70,165
	Chick-Fil-A	Restaurant	7,472	
	Chesapeake Seventh Day Adventist	Storage Building	6,300	
	Atholton Adventist	Classroom Building	5,304	
Ellicott City	Auto Spa Express	Car Wash	5,933	5,933
Rural West	Lisbon Volunteer Fire Company	Banquet Hall	7,684	7,684
Southeast	Montpelier Research Park	Office Building	37,212	64,456
	Montpelier Research Park	Office Building	27,244	
TOTAL				148,238

Map 14
Issued Permits for Major
Non-Residential Projects



Five Year Results

Table 58 shows issued non-residential building permits countywide for the last five reporting periods from 2021 to 2025. Over this five-year time-frame there were 145 permits issued for about 2.5 million square feet of building space. This equates to an annual average of about 500,000 square feet per year.

As summarized in Table 58, the latest reporting period for 2025, with 167,000 square feet in issued permits, is the smallest amount permitted in the last five years and significantly less than the 538,000 square feet permitted the year before in 2024.

Table 59 shows the five-year history by building type. Over the five years, 39% of the total 2.5 million square feet was for government and institutional uses. Another 35% was for manufacturing/extensive industrial uses, 21% for office/service space, 5% for retail space, and less than 1% for other uses. Chart 23 shows this five-year history graphically.

Table 58
Issued Non-Residential Building Permits
2021 to 2025

Year	Square Feet	Number of Permits
2021	839,613	35
2022	582,244	35
2023	371,739	32
2024	537,996	21
2025	166,903	22
TOTAL	2,498,495	145
ANNUAL AVG.	499,699	29

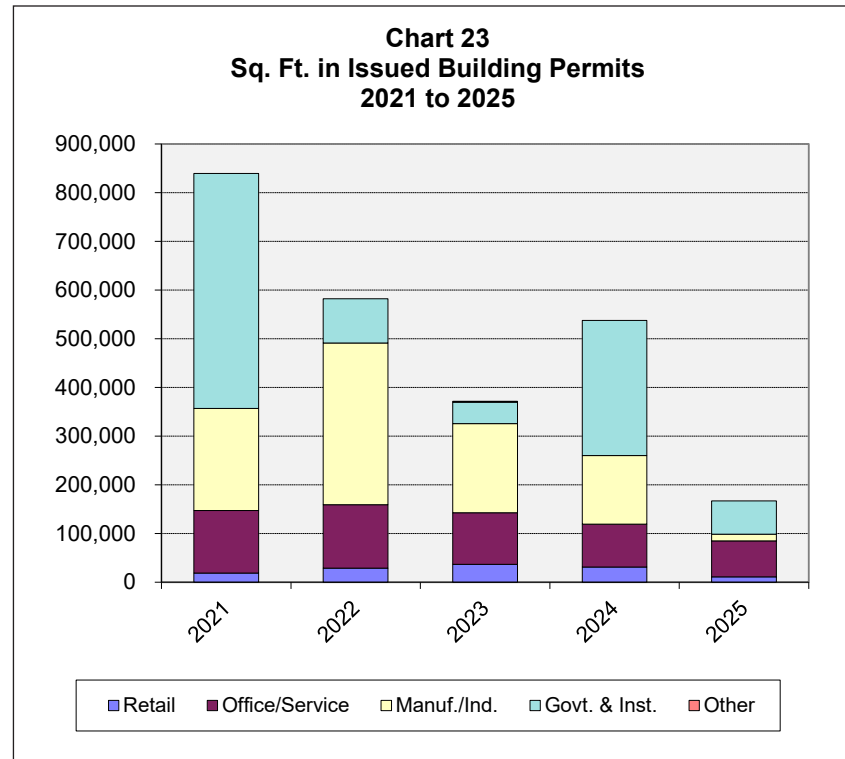


Table 59
Building Square Feet in Issued Non-Residential Building Permits
2021 to 2025

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
2021	18,991	128,199	209,931	482,492	0	839,613
2022	28,889	130,381	332,308	90,666	0	582,244
2023	36,634	106,383	182,594	44,328	1,800	371,739
2024	31,264	88,175	140,756	277,801	0	537,996
2025	10,973	74,093	13,700	68,137	0	166,903
TOTAL	126,751	527,231	879,289	963,424	1,800	2,498,495
PERCENT	5.1%	21.1%	35.2%	38.6%	0.1%	100.0%

Employment Estimates

New job potential has been estimated based on the standard square feet per employee factors shown in Table 60. These factors are multiplied by the square footage of planned building space which is included on approved site development plans and building permits.

Table 60
Square Feet per Employee Standard Factors

Type of Space	SF/Emp.
Retail	400
Office/Service	250
Manufacturing/Extensive Industrial	1,000
Government & Institutional	500

The first section below estimates future employment potential from site development plans. This is followed by an estimate from building permits. The last section discusses estimated actual employment changes as reported by the State Department of Labor.

Job Potential from Site Development Plans

Based on the above factors, building space in site development plans approved last year from January 1, 2025, to December 31, 2025, could accommodate an estimated 601 employees (Table 61). About 56% of the potential jobs are located in the Southeast. About 38% of the potential jobs are located in Columbia, and about 6% of the total Countywide potential jobs are located in Ellicott City.

Countywide, 298 potential jobs, about 50% of the total 601 jobs associated with approved site development plans, are office/service jobs. Another 221 are government & institutional jobs (37%), 50 are retail jobs (8%) and 32 are manufacturing/extensive industrial jobs (5%).

Table 61
Potential Employment from Approved Non-Residential SDP's in 2025
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Columbia	39	0	0	192	230	38%
Elkridge	0	0	0	0	0	0%
Ellicott City	12	25	0	0	37	6%
Rural West	0	0	0	0	0	0%
Southeast	0	273	32	29	333	56%
TOTAL	50	298	32	221	601	100%
PERCENT	8.4%	49.6%	5.3%	36.8%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 62 below, there is a potential for 474 new jobs that could be accommodated based on issued building permits. About 63% of the total are potential office/service jobs, most all in the Southeast, and another 29% are government and institutional jobs. This is followed by 6% retail jobs and 3% manufacturing/extensive industrial jobs.

Table 62
Potential Employment from Issued Building Permits in 2025
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Columbia	19	0	7	119	144	30%
Elkridge	0	0	4	1	4	1%
Ellicott City	0	24	0	1	25	5%
Rural West	9	0	4	15	28	6%
Southeast	0	273	0	0	273	58%
TOTAL	27	296	14	136	474	100%
PERCENT	5.8%	62.6%	2.9%	28.8%	100.0%	

MD Department of Labor Employment Estimates

The previous sections estimate potential employment from new development. This section provides an overview of estimated employment changes as reported by the Maryland Department of Labor. This would include an increase in employment from new development as well as from any change in the number of jobs in existing building space. The latter would generally be impacted by changes in vacancy rates associated with the economy. It could also be a result of the re-configuration of existing building space resulting in more (or less) jobs per square foot. An example of this is the re-configuration of a warehouse to office use.

The Maryland Department of Labor reports statistics produced by the ES-202 Program. The data are generated and published on a quarterly basis and include all workers covered by the Unemployment Insurance Law of Maryland and the unemployment compensation for federal employees program. Together these two account for approximately 98% of all wage and salary civilian employment.

Table 63 shows the jobs for the most recent reporting period compared to the previous year. From 2024 to 2025 the State reports a decrease of 615 jobs in Howard County, from 171,628 jobs in 2024 to 171,013 jobs in 2025 (1st quarter data). It is anticipated that job totals in Howard County will continue to recover from the significant job losses during the recent pandemic, although it is unclear when the job total will be back at the pre-pandemic level of close to 174,400 at the beginning of 2020.

Table 63 also shows the average weekly wages by job type as reported by the Maryland Department of Labor for the 1st quarter 2025. In the 1st quarter of 2025, the Department of Labor reported that the 171,13 wage and salary jobs in Howard County had an average weekly wage of \$1,757. This is a 2.03% increase compared to the previous year when weekly wages averaged \$1,722.

Table 63
Jobs and Weekly Wages by Industry, 2024 and 2025

Job Type	2024		2025	
	Jobs	Wages	Jobs	Wages
Government Sector				
Federal Government	2,116	\$2,604	2,175	\$2,753
State Government	1,800	ND	1,637	\$1,700
Local Government	15,020	ND	15,381	\$1,506
Subtotal/Average	18,936	\$1,630	19,193	\$1,664
Goods Producing				
Natural Resources and Mining	286	\$869	225	\$775
Construction	11,220	\$1,724	10,911	\$1,836
Manufacturing	6,880	\$1,907	6,775	\$1,748
Subtotal/Average	18,386	\$1,779	17,911	\$1,798
Service Providing				
Trade, Transportation, and Utilities	34,079	\$1,441	34,015	\$1,434
Information	3,173	\$4,501	2,394	\$5,585
Financial Activities	8,045	\$2,620	8,389	\$2,533
Professional and Business Services	47,727	\$2,276	47,171	\$2,412
Education and Health Services	21,914	\$1,172	21,930	\$1,162
Leisure and Hospitality	14,824	\$551	15,402	\$561
Other Services	4,544	\$1,089	4,608	\$1,113
Subtotal/Average	134,306	\$1,727	133,909	\$1,766
TOTAL	171,628	\$1,722	171,013	\$1,757

Source: State Department of Labor (1st quarter). Weekly wages. ND: Not Disclosable

Land Preservation

The County's General Plan, *HoCo By Design*, adopted in October 2023, calls for the annual tracking of open space and preservation easements in Howard County. This section summarizes all parks and open space land and preservation easements acquired in 2025 by type. The cumulative total of all acres preserved by type countywide is also summarized.

Open space land is generally recorded as part of subdivision activity in the County. This includes Homeowners Association (HOA) and Recreation and Parks open space land acquired by the County as required under the Zoning and Subdivision and Land Development regulations. Open space and parkland may also be acquired directly by deed when subdivision of land does not occur. The County purchases park land for active and passive uses and for land preservation to fulfill goals outlined in *HoCo By Design* and the *Land Preservation Parks and Recreation Plan*.

Dedicated preservation easements are recorded as part of subdivision activity in the County, particularly in the Rural West where the RR and RC zoning incentivises the preservation of land through density and cluster exchange options (DEO/CEO). Preservations easements allow the original land owner to maintain ownership of the land while preventing future development to take place. There are generally two main types of dedicated preservation easements, agricultural and environmental. Both types are created through the subdivision process, and like open space, can also be created when the subdivision of land does not occur, for example, when a private conservation group acquires an easement for the purposes of land preservation. Agricultural preservation easements are also preserved through the County's Agricultural Land Preservation Program (ALPP) purchase program, where the County acquires future development rights of farmland in the Rural West. The State of Maryland may also purchase easements for land preservation purpose through various programs.

Open Space & Parkland Acquired

Table 64 shows the recorded and deeded parks and open space land in 2025 by Planning Area. A total of 46 acres of new parks and open space land were acquired. The greatest amount, 21 acres, was added as HOA and County open space in Ellicott City as part of the Crested View at Taylor Highlands subdivision. About 12 acres of County open space was acquired in the Rural West as part of the Brickell Property subdivision. Close to 8 acres of HOA and County open space land was added in two subdivisions in Elkridge. In the Southeast there were 4 acres of park land recorded for the High Ridge Neighborhood Park, and a small amount (1 acre) of open space was recorded in Columbia as part of the Trotter Estates subdivision.

Table 64
Recorded and Deeded Parks and Open Space in 2025

Region	Date	Name	Type	Tax Map	Parcel	Zone	Acres	Total
Elkridge	3/25/2025	The Aerie at Elkridge	HOA Open Space	38	232	R-12	1.94	7.75
	3/25/2025	The Aerie at Elkridge	HOA Open Space	38	232	R-12	0.67	
	7/15/2025	Cascade Ridge	HOA Open Space	31	474	R-ED	1.16	
	7/15/2025	Cascade Ridge	County Park & Open Space	31	474	R-ED	1.69	
	7/15/2025	Cascade Ridge	County Park & Open Space	31	474	R-ED	2.29	
Ellicott City	10/31/2025	Crested View at Taylor Highlands	HOA Open Space	25	73	R-A-15	2.87	21.24
	10/31/2025	Crested View at Taylor Highlands	HOA Open Space	25	73	R-A-15	0.03	
	10/31/2025	Crested View at Taylor Highlands	HOA Open Space	25	73	R-A-15	0.01	
	10/31/2025	Crested View at Taylor Highlands	HOA Open Space	25	73	R-A-15	0.01	
	10/31/2025	Crested View at Taylor Highlands	HOA Open Space	25	73	R-A-15	4.55	
	10/31/2025	Crested View at Taylor Highlands	HOA Open Space	25	73	R-A-15	0.22	
	10/31/2025	Crested View at Taylor Highlands	County Park & Open Space	25	73	R-A-15	13.55	
Columbia	3/14/2025	Trotter Estates	County Park & Open Space	35	10	R-20	1.18	1.18
Rural West	4/17/2025	Brickell Property	County Park & Open Space	10	274	RR-DEO	11.86	11.86
Southeast	11/6/2025	High Ridge Neighborhood Park	County Park & Open Space	50	463	R-20	4.00	4.00
TOTAL								46.02

Preservation Easements

Agricultural Land Preservation

Howard County’s Agricultural Land Preservation Program (ALPP) has been the primary tool for preserving farmland. Most of the preserved farmland in this program is from the purchase of easements where a farmer can choose to sell a perpetual easement to the County while holding fee simple title to the land and continuing to farm. The easement restricts development on the land and remains with the land even when it is sold.

Agricultural land preservation in the County first began in 1979 using the State’s easement purchase program, known as the Maryland Agricultural Land Preservation Foundation (MALPF). The County instituted its own easement purchase program, indicated above, in 1984 and until 1988 both the State and County programs were active in preserving farmland. In

1989 the County initiated the innovative Installment Purchase Agreement (IPA) program to purchase easements. The IPA program has been very successful attracting many new farmers to the County program.

Farmland may also be preserved in the ALPP through the dedication of preservation parcels as part of the development process in the RC and RR zoning districts, either as the dedication of sending parcels using the Density/Cluster Exchange Options (DEO/ CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992.

Environmental Land Preservation

Parcels may also be preserved in the Rural West through the development process as environmental preservation parcels using the Density/Cluster Exchange Options (DEO/CEO) or the dedication of preservation parcels within cluster subdivisions. There must be two easement holders for environmental preservation parcels. The majority of the total dedicated preservation easements, are jointly held by Howard County and various homeowner’s associations. Other joint easement holders on environmental land include the Howard County Conservancy and other conservancy organizations.

The Howard County Zoning regulation also allow for neighborhood preservation parcels in eastern Howard County. Similar to preservation in the Rural West, neighborhood preservation parcels are created in the east by transferring density rights from a sending parcel, which is permanently preserved, to a receiving parcel to allow additional density above what the by right zoning there allows. For each transaction, sending and receiving parcels must be within the same planning area or within a two-mile radius regardless of the planning area. Additionally, sending parcels that contain a historic structure may exchange density with a receiving parcel in any planning area. Properties must be zoned R-ED, R-20, R-12 or R-SC.

Environmental land can also be preserved by land conservation organizations such as the Howard County Conservancy, the Maryland Environmental Trust, and other land trust organizations. Easements are placed on the land by these organizations for the purposes of environmental preservations.

Preservation Easements Acquired in 2025

Table 65 shows all agricultural and environmental land preservation easements acquired in 2025 by Planning Area. A total of about 247 acres were acquired, most of which was in the Rural West. This includes two acquisitions totaling 153 acres added to the ALPP purchased easement program and a 24.6 acre dedicated agricultural preservation easement acquired through the subdivision process. There were also several environmental preservation easements added in three subdivisions the Rural West as part of the subdivision process totaling 54 acres. A 10 acre environmental conservation easement was acquired in Elkridge at the Watermont Swim Club, and three neighborhood preservation easements were acquired in two subdivisions in Ellicott City totaling 5.8 acres.

Table 65
Recorded and Deeded Preservation Easements in 2025

Region	Date	Name	Type	Tax Map	Parcel	Zone	Acres	Total
Ellicott City	10/31/2025	Taylor Property Par 46	Neighborhood Preservation Easement	25	46	R-ED	2.78	5.8
	10/31/2025	Taylor Property Par 40	Neighborhood Preservation Easement	25	40	R-ED	2.01	
	10/31/2025	Journey's End	Neighborhood Preservation Easement	25	72	R-ED	1.00	
Rural West	2/6/2025	Day Property	Howard County Purchased Easements	6	119	RC-DEO	86.16	231.5
	7/29/2025	Harrison	Howard County Purchased Easements	6	253	RC-DEO	66.60	
	4/8/2025	Chelsea Knolls	Environmental Preservation Parcel	12	78	RC-DEO	29.37	
	6/16/2025	Blooms Lane Property	Howard County Agricultural Preservation Parcels	2	26	RC-DEO	24.62	
	4/8/2025	Brickell Property	Environmental Preservation Parcel	10	274	RR-DEO	11.86	
	4/8/2025	Brickell Property	Environmental Preservation Parcel	10	274	RR-DEO	4.86	
	4/8/2025	Brickell Property	Environmental Preservation Parcel	10	274	RR-DEO	4.29	
	6/16/2025	Baldwin Estates	Environmental Preservation Parcel	14	78	RC-DEO	1.75	
	4/8/2025	Brickell Property	Environmental Preservation Parcel	10	274	RR-DEO	1.16	
	4/8/2025	Brickell Property	Environmental Preservation Parcel	10	274	RR-DEO	0.84	
Elkridge	6/27/2025	Watermont Swim Club	Conservation Easement	37	528	R-20	10.00	10.0
TOTAL								247.3

Aggregate Open Space & Preservation

Table 66 summarizes the total acreage of preservation easements and parks and open space land in Howard County as of December 31, 2025.

A total of 16,309 acres of purchased easements have been preserved in the County’s Agricultural Land Preservation Program (ALPP). An additional 3,068 acres have been dedicated to the ALPP through the subdivision process. MALPF easements total 4,036 acres and the MD Rural Legacy Program has 81.3 acres in Howard County. This results in a total of close to 23,495 acres of agricultural land preserved in Howard County.

About 9,219 acres of land are held as environmental easements acquired through the subdivision process. An additional 1,843 acres are held by the Maryland Environmental Land Trust and other private land trusts. About 80 acres are held in neighborhood preservation easements acquired through the subdivision process in eastern Howard County. The resulting total agricultural and environmental easements held in the County is 34,638 acres.

The parks and open space land shown in Table 66 include 10,271 acres of County parks and open space, 9,291 acres of State parkland as part of the Patapsco State Park, and 3,213 acres owned by the Washington Suburban Sanitary Commission along the Putuxent River. An additional 8,642 acres of Columbia and HOA open space is also permanently preserved. This results in a total of 31,417 acres of parks and open space land preserved in Howard County.

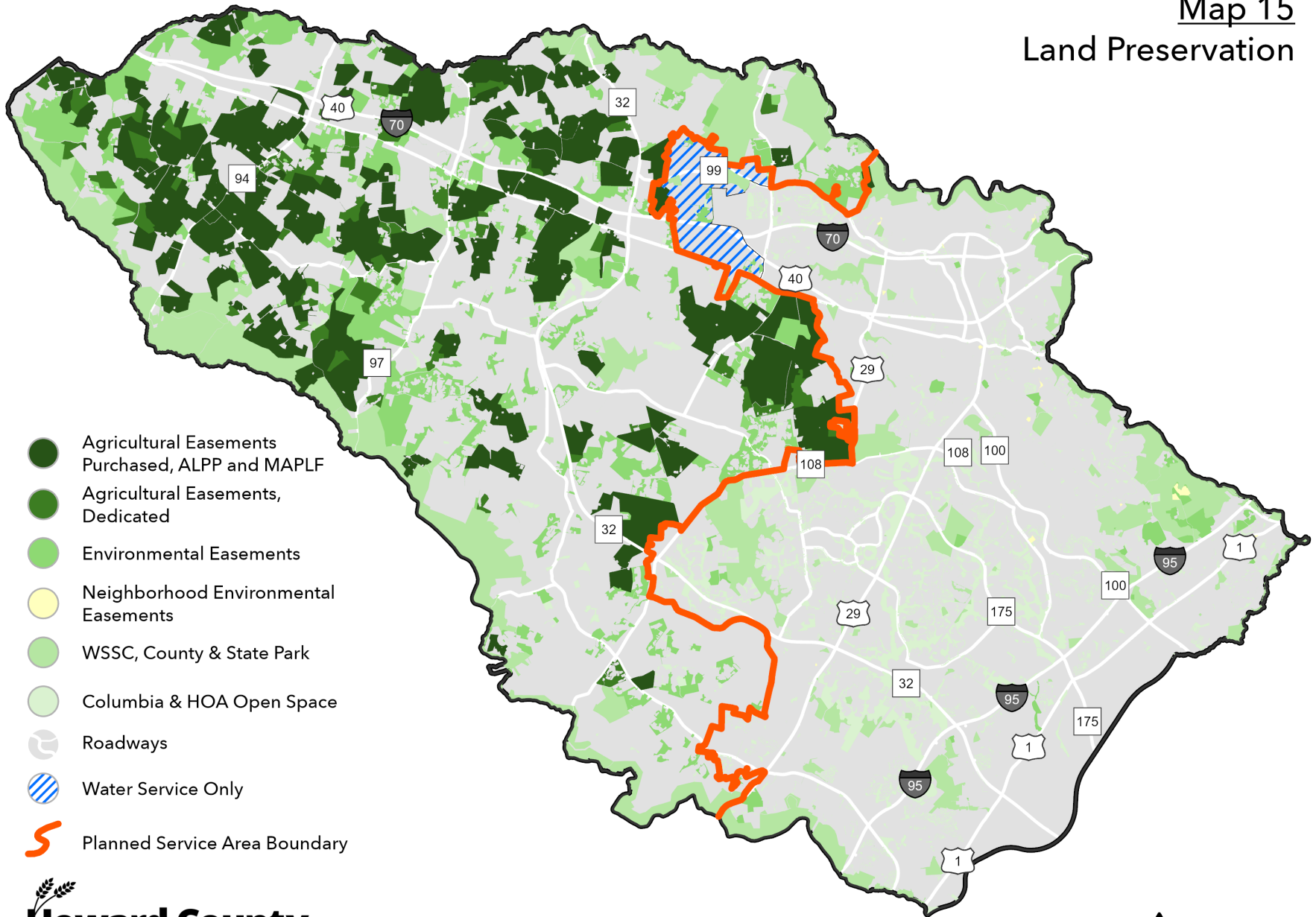
Total preserved agricultural and environmental easements and parks and open space land amount to 66,055 acres, about 41% of the total 162,000 acres of land in Howard County. Preserved land by category is shown Map 15.

Land is also preserved in forest conservation easements as required as part of the subdivision process by State and County law. Many of the forest conservation easements are within parks, open space, and environmental and agricultural preserved land. For further details on forest conservation, please refer to the Department of Planning and Zoning’s Forest Conservation report.

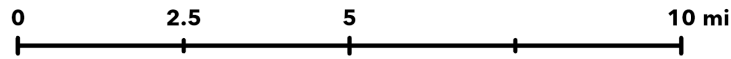
Table 66
Preservation Easements and Parks & Open Space
as of December 31, 2025

PRESERVATION EASEMENTS	Acres
Agricultural Preservation Easements	
Howard County Agricultural Land Preservation Program (ALPP), Purchased Easements	16,308.8
Howard County Agricultural Land Preservation Program (ALPP), Dedicated Easements	3,068.5
MD Agricultural Land Preservation Program (MALPF)	4,036.4
Total ALPP and MALPF	23,413.7
MD Rural Legacy Program	81.3
Total Agricultural Preservation Easements	23,495.0
Environmental Preservation Easements	
Environmental Preservation, Dedicated Easements	9,219.4
MD Environmental Trust & Other *	1,842.9
Neighborhood Preservation Easements	80.3
Total Environmental Easements	11,142.6
TOTAL PRESERVATION EASEMENTS	34,637.6
PARKS AND OPEN SPACE	
County Parks & Open Space	10,271.4
State Parks	9,290.9
Washington Suburban Sanitary Commission	3,213.1
Columbia & HOA Open Space	8,642.1
TOTAL PARKS & OPEN SPACE	31,417.5
GRAND TOTAL PRESERVATION EASEMENTS AND PARKS & OPEN SPACE	66,055.1
* Includes HCC Purchased conservation easement pilot program	
TOTAL COUNTY ACRES	162,000
PERCENT PRESERVED	40.8%

Map 15 Land Preservation



- Agricultural Easements Purchased, ALPP and MAPLF
- Agricultural Easements, Dedicated
- Environmental Easements
- Neighborhood Environmental Easements
- WSSC, County & State Park
- Columbia & HOA Open Space
- Roadways
- Water Service Only
- Planned Service Area Boundary



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