

Maryland Aerospace and Technology Commission



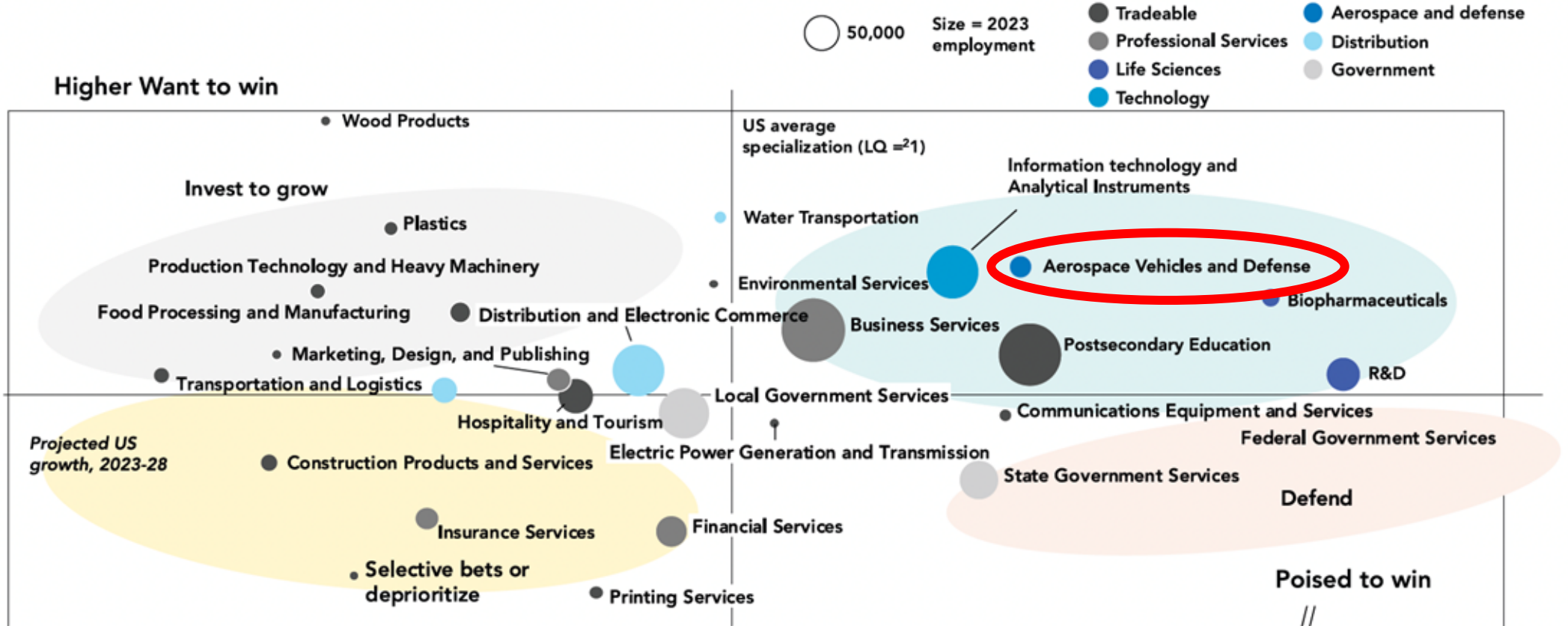
for

Senate Finance Committee in support of SB0867

Dr. Dale L. Moore, Chair MATC

5 March 2026

Sectors in Maryland by growth, specialization and employment¹



1. Customized sector classification system based largely on methodology of Harvard Business School's U.S. Cluster Mapping Project, with some modifications (e.g., separated "Education and Knowledge Creation" into two new sectors: "Postsecondary Education" and "R&D"; moved some 6-digit NAICS sectors from "Business Services" to "Information Technology and Analytical Instruments"); Does not include "local" sectors (except Local Government) or those with fewer than 2000 jobs in Maryland
2. Projected U.S. employment growth, 2023-28
3. Location quotient (LQ) measures how concentrated a sector is in each region compared to the nation; based on 2023 employment.

Source: Lightcast; Harvard Business School's U.S. Cluster Mapping Project

PWC Aerospace Market Analysis

\$1.5 T

Projections for the space industry call for a tripling in annual value in the next decade, to around \$1.5 trillion.

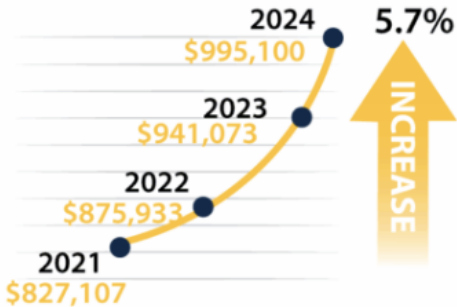


AIA Aerospace Market Analysis



2025 FACTS & FIGURES U.S. AEROSPACE & DEFENSE

\$995 BILLION IN SALES



The U.S. A&D industry generated over \$995 billion in sales in 2024, a 5.7 percent increase from the previous year.

BREAKDOWN OF SALES



Commercial direct sales in 2024 totaled over \$328 billion, while defense sales totaled over \$228 billion. These sales include aircraft, space equipment, cybersecurity, and land and sea systems. The supply chain accounts for another \$438.7 billion in sales output.

SUPPORTING WELL-PAYING JOBS



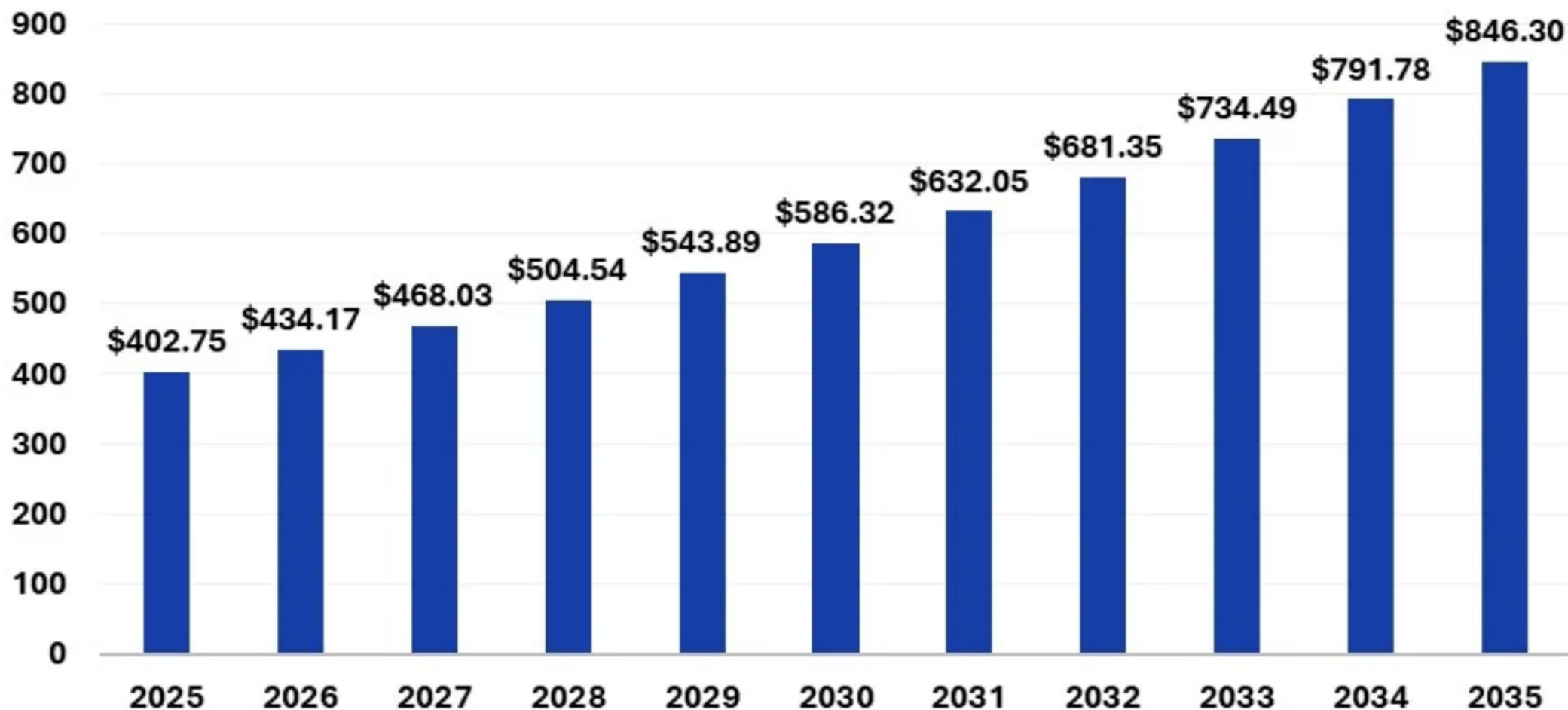
Every million dollars in end-use sales supports four employees across end-use manufacturing and the supply chain.

CONTRIBUTION TO GDP



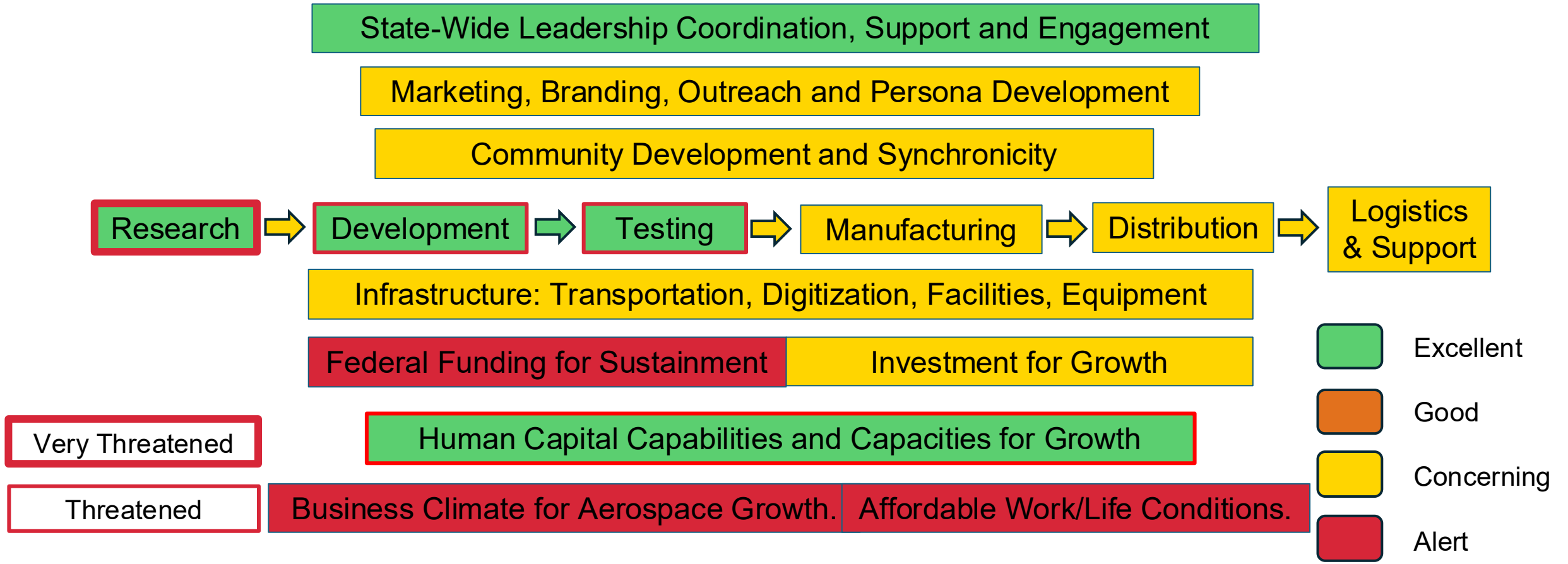
The A&D industry generated \$443 billion in economic value in 2024 – 1.5 percent of the 2024 nominal GDP in the U.S. This total increased by 5.4 percent above 2023 – outpacing the nominal GDP growth across the entire U.S. economy.

Aerospace Market Size 2025 to 2035 (USD Billion)



Source: <https://www.precedenceresearch.com/aerospace-market>

MD Aerospace and Technology Landscape “As-Is” State

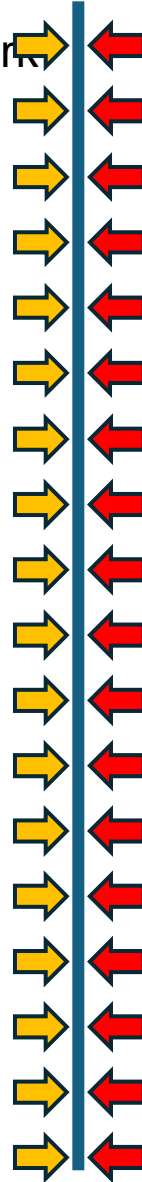


MATC Force Field Diagram

Addressing the **“System Constraints”** with the **“System Enablers”**

Enablers

MD Aerospace Strategic Awareness/Planning Cell & Network
“SMART MD” Technology/Infrastructure Deployment
Growth/Future-Driven Research Investment
K-20 Continuous Education Transformation
Innovation Driven Culture
Aerospace ‘Industry 4.0’ Transformation Strategy & Plan
MD Economic Growth & Efficiency Agenda
Venture and FDI Attraction
Aggressive Business Attraction & “In-House” Support
More Affordable Housing
Business and Workforce Expansion/Growth
Aggressive Worker Attraction (Quality of Life)
eVOTL, UAM, Ferries, Autonomous Vehicles
Digitization/Virtualization/SME Communities/Events
Commercial/Federal Market Synergy
Create Agile & Adaptive Enterprises & Infrastructure
Tech Talent Pool Available – Business Growth
Aggressive Marketing and Branding



Constraints

Lack of Aerospace Strategic Awareness/Engagement
Legacy Infrastructure
Federal Research Atrophy/De-emphasis
Education Constraints
Innovation Challenges
Limited/Constrained Aerospace Manufacturing
Economic/Budgetary Challenges
Investment Constraints
Risk of Business Loss & Stagnation
High Cost of Living
Workforce Attrition/Migration (Mil/Civ)
Very Low Unemployment (Limits Growth)
Limited Transportation Systems
Dispersed Aerospace SME Assets
High Federal Resource Dependency
Mission Changes (NASA, DOD)
Federal and Contracted Workforce Cuts
Limited Aerospace Recognition

Workstream Subcommittees

R&D Funding – Charles Ichoku & Aaron Miscenich

Alison Flatau (Commissioner, UMD)
Aaron Miscenich (Co-lead, BWtech@UMBC)
Joseph Eimer (MD Space Grant)
Vanderlei Martins (UMBC)
Barbara Lam (Aura-Astronomy)
Sarah Horta (MEDCO)
Dennis Lee (Vortex Space Systems)
Thierry Adrien (MEDCO)

Public Private Partnerships / Investments – Georgie Brophy

Alison Flatau (Commissioner, UMD)
Bobby Braun (Commissioner, APL)
Ryan Gerard (Commissioner, GCA and GVT)
John Gilstrap (DOC)
George Davis (York Space Systems)
Charlie Bengston (PTX)
Caroline Massey (PTX)
Dennis Lee (Vortex Space Systems)
Sterling Spengler (AMA)

Education & Workforce – Willie Brown

Senator Alonzo Washington (Commissioner, MGA)
Dale Moore (Commissioner, SoMNA)
Jen Lotz (Commissioner, STScl)
Joseph Eimer (MD Space Grant)
Community Colleges

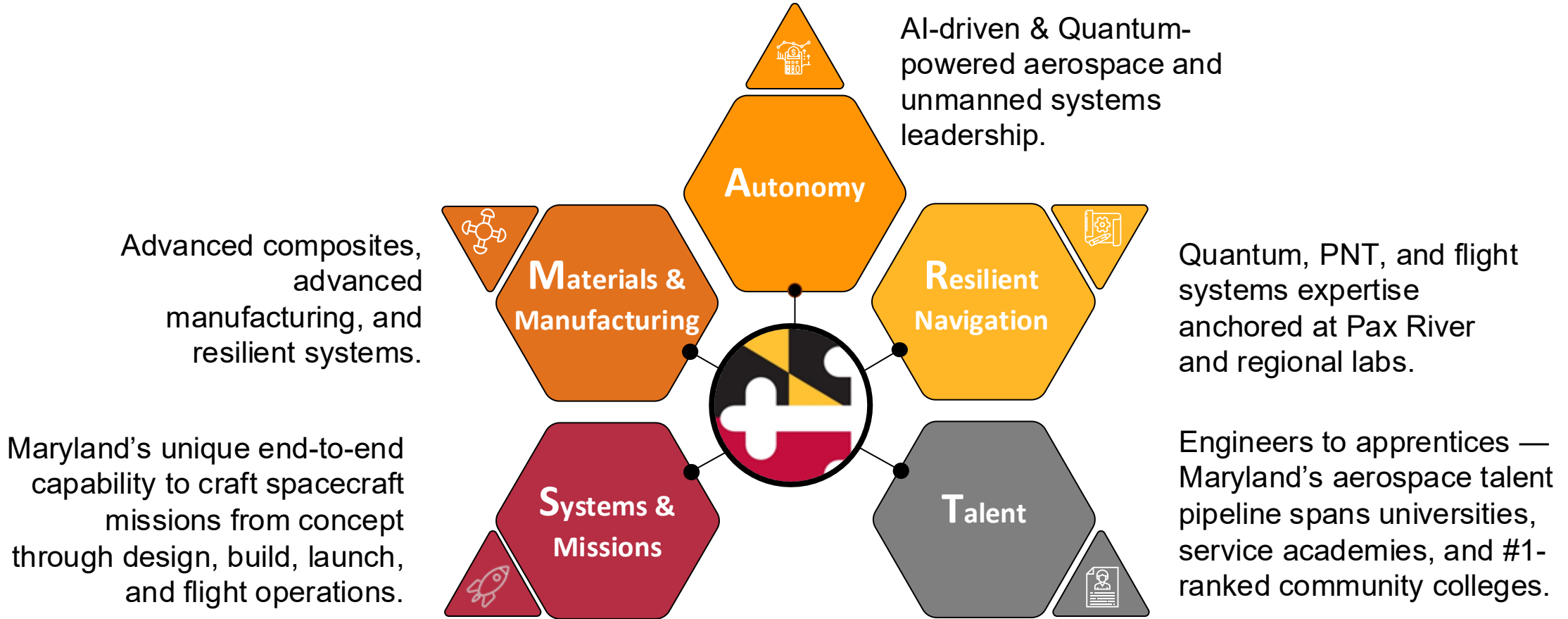
Aerospace Zones – Dale Moore

Delegate Mark Chang (Commissioner, MGA)
Bobby Braun (Commissioner, APL)
County EDCs
Colter Menke (DOC)

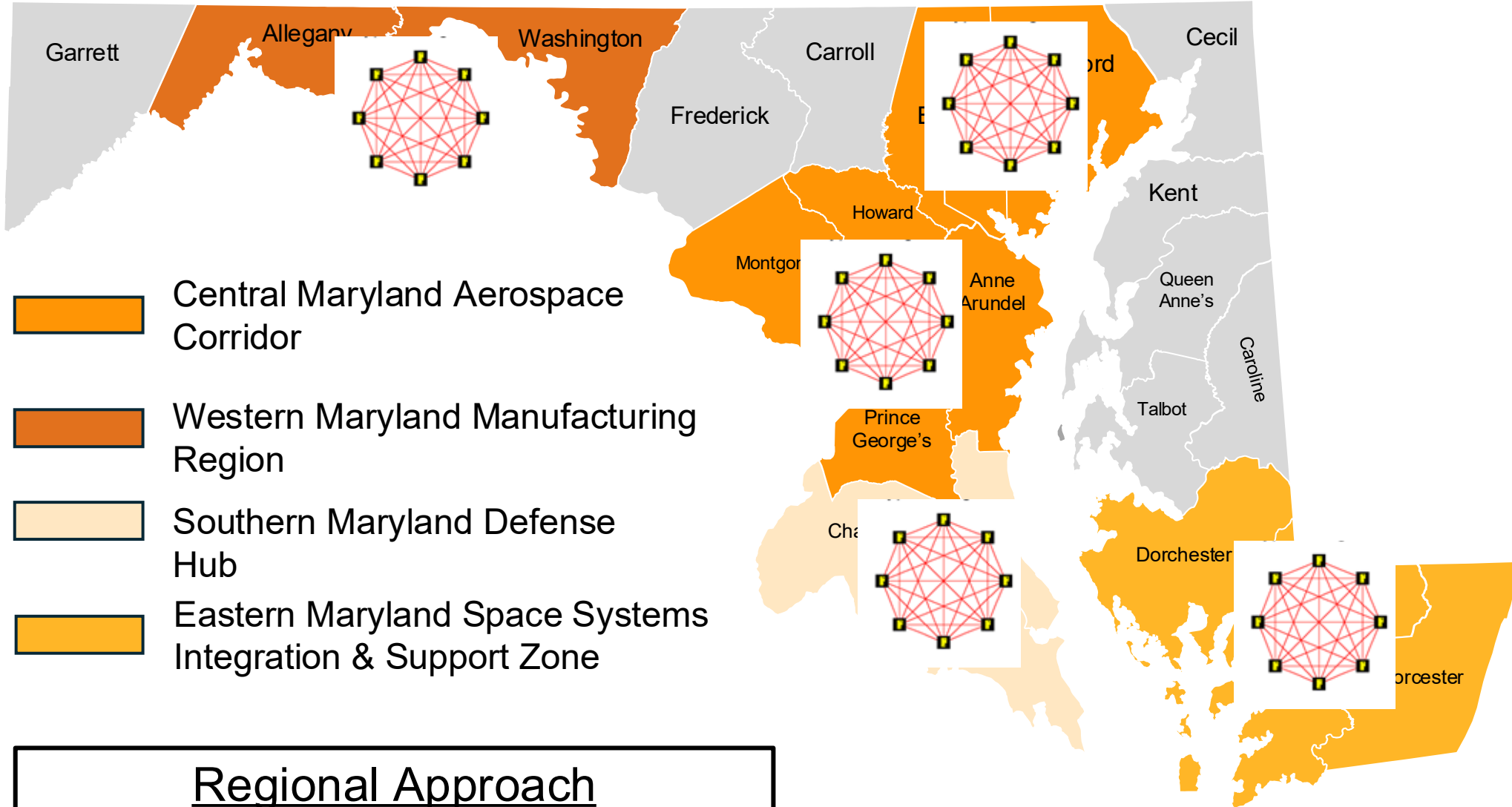
Marketing – Ulyana Desiderio & Janeen Uzzell

Georgie Brophy (Vice-Chair & Commissioner, MSBR)
Colter Menke (DOC)

Maryland's SMART Aerospace Hub Strategic Thrust Areas

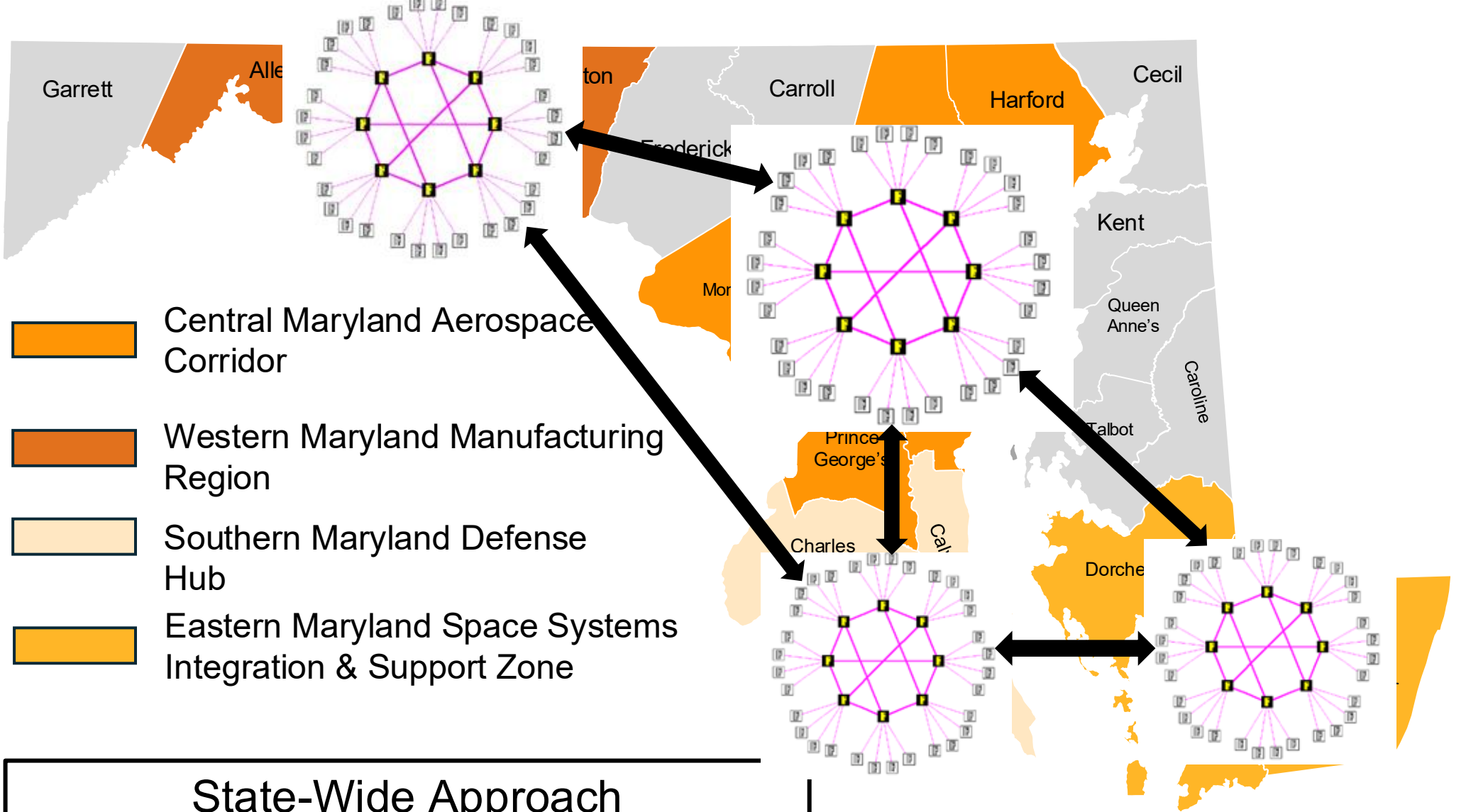


Stage 1
 Regional
 Synergy



Regional Approach
 Transforms regional strengths into
 statewide competitive advantage





Stage 2
State-Wide
Synergy

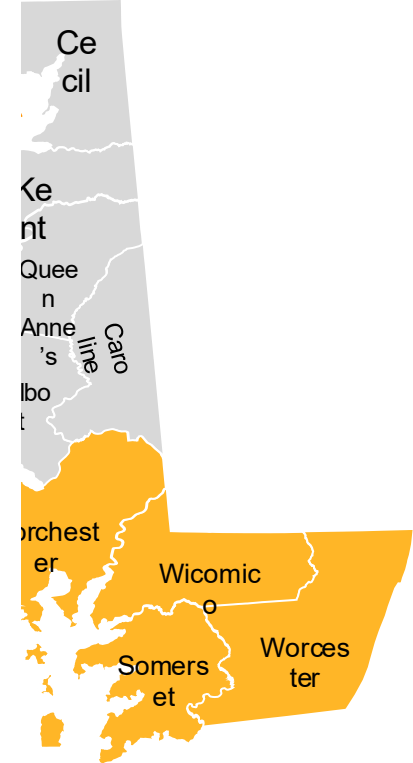
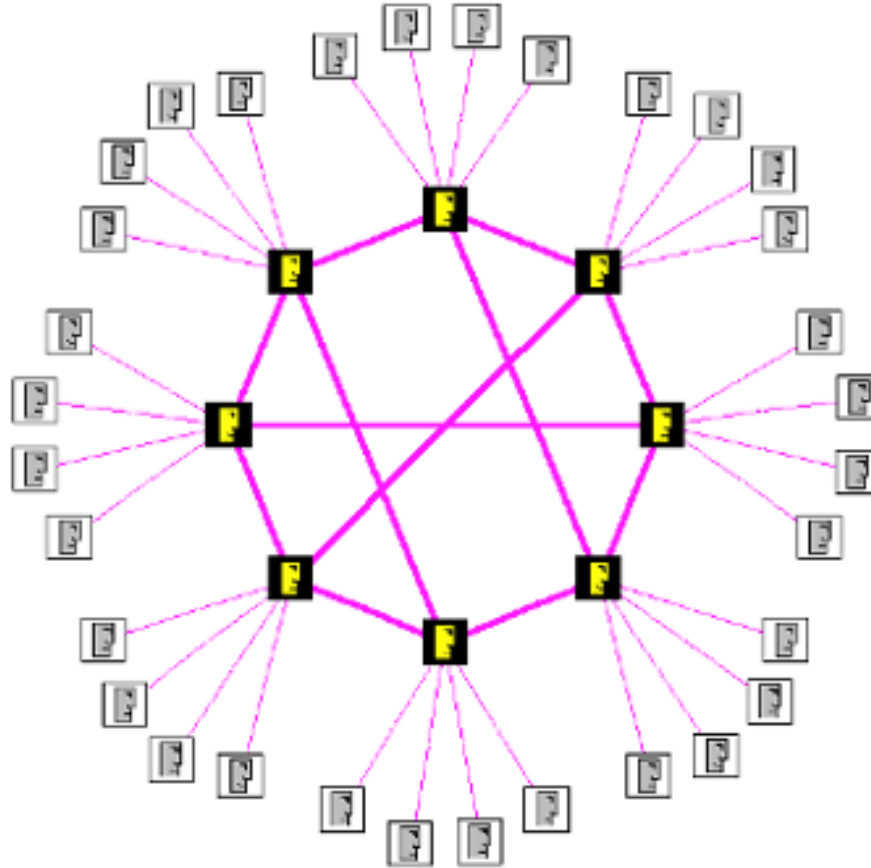


State-Wide Approach
 Transforms regional strengths into
 statewide competitive advantage

Stage 3 Expansive National & Global Networking

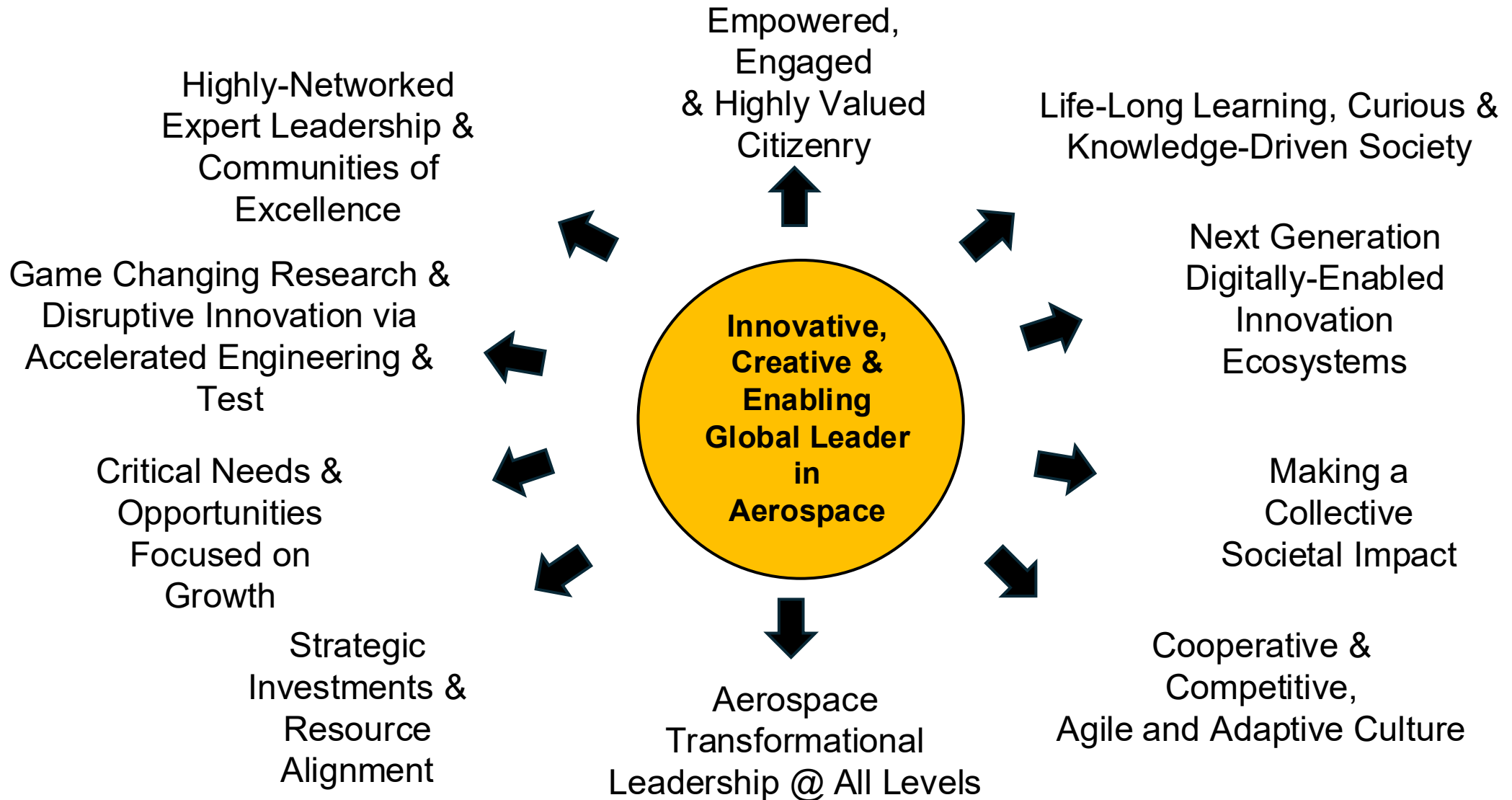


-  Central Corridor
-  Western Shore
-  Southern Shore
-  Eastern Shore



Regional/State/National/Global Approach
Transforms regional strengths into statewide
competitive advantage

Maryland Innovation Strategic Vision – Enabling Unlimited Possibilities



A Culture of Excellence and Innovation Leadership Leading to Prosperity & Global Competitiveness

MATC ATZ 'Exemplary' Characteristics Checklist

ATZ Regional & Customer Support

- Engaged Economic Development Organizations/Commissions
- Engaged Planning and Zoning Organizations
- Supportive County Commissioners/Local Leadership
- Federal/State/Local Government Anchor Clients
- For-Profit Anchor Clients & Non-Profit Enablers

ATZ Attraction and Accessibility

- Marketing and Local Event Awareness
- Clear Designating Signage
- Transportation Access

ATZ Readiness for Growth

- Airfield & Hangers – Site Ready/Shovel Ready
- Visitor/Tenet Ready Housing
- Socialization & Collaboration Locations & Events Hosting
- Innovation/Entrepreneurship Support/Programs

ATZ Innovation Pipeline

- Scientific Research & Engineering Labs
- Prototype and Manufacturing Capabilities
- Innovation Maker/Incubation Center Spaces
- Test & Evaluation Capabilities

ATZ Workforce Development

- Education and Training Facilities
- Apprenticeship and Internship Programs

**Trigger
Community
Dialogue**

**Identify
Others?**

**Build Portfolio of
Initiatives**

MATC Status Review

First Year (What we have achieved by December 2025):

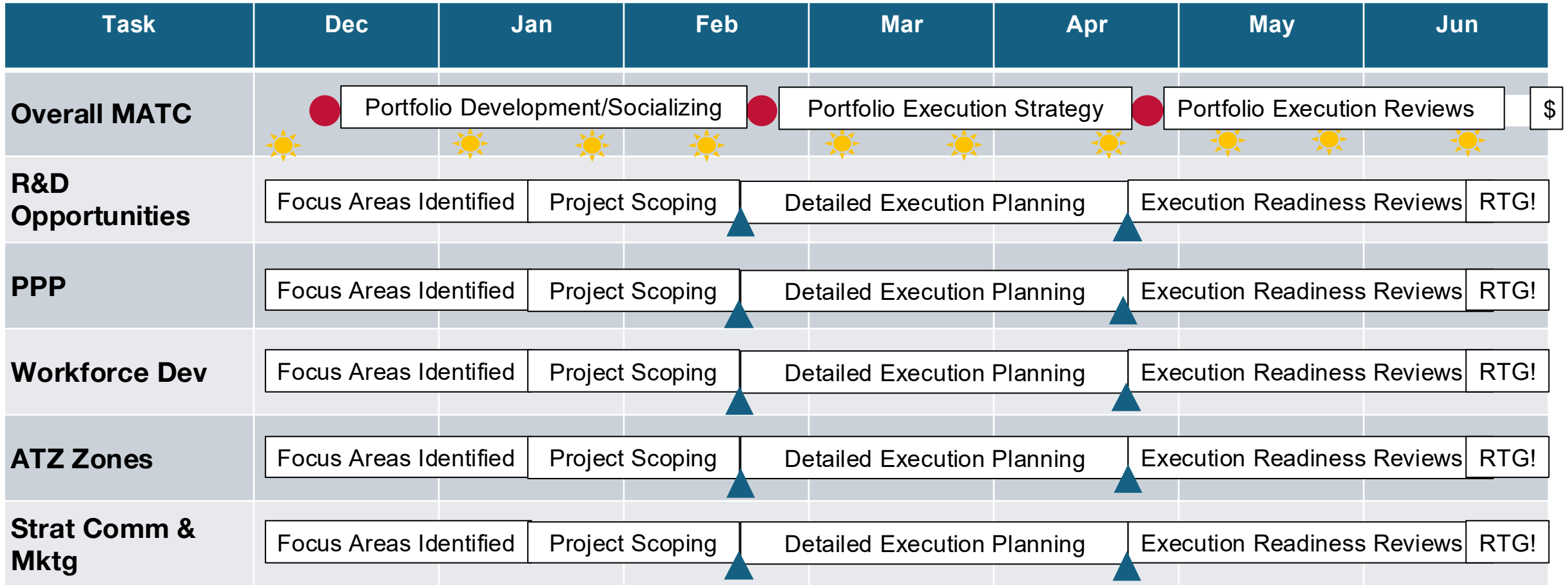
- **MATC Strategic Plan 2025 Delivered 1 October***
- MATC Industry/Government/Academia Internal/External Benchmarking Well Underway
- MATC Teams Formed, Chartered and Operating to Develop/Deliver Continuous Improvement Results
- Strategic As-Is & To-Be, Force Field and SWOT Analyses Complete
- Key MATC Opportunities, Initiatives, and Projects Identified
- Initial Strategies Formulated & Consolidated
- Aerospace and Technology Zones Identified
- Strategic Communications and Marketing Plans under Development

Key Second Year Focus Areas – the Follow-Through with Key Resources:

- Build End-to-End Pipelines & Forums for Integrated RDTE, Innovation and Technology
- Identify Best Strategies/Programs for Accelerating End-to-End K-20 Workforce Development
- Benchmark FDI Needs and Opportunities
- Implement Public Private Partnership & External Investment and Marketing Initiatives
- Empower, Enable and Support ATZ Emergence, Development and Connections
- “Tell our Exemplary Aerospace Story” Communications & Marketing Plan

Vision: Maryland is Advancing in Space, Aerospace, Innovation and Technology – the Future is Here!

MATC Workstream Planning Through Budget Release



MATC Team Mtgs



Stakeholder Engagements Work



Milestones/Achievements Status Delivered

MATC Legislative Request



- MATC Grant Program for Aerospace & ATZ Economic Development = FY27 (\$22.5M), FY28 (\$30M)
- DoC Executive Director to support MATC Operations = \$175k (inhouse)
- R&D Opportunity Scanning/Dissemination and Strategic Analysis = \$250K (contracted)
- MATC Hosting of Events Budget (ex. Venture, Conference(s), Meetings etc.) = \$250K (contracted)
- Economic Impact Study for National-level Competitive Aerospace Sector Analysis = \$250K (contracted)
- Workforce Development (internships/Apprenticeships/Community College Programs = \$5M (inhouse/contracted)
- Aerospace-specific Marketing & Communications = \$1.5M (in-house/contracted)
- Total FY27 Request = \$30,000,000
- Total FY28 Request = \$37,500,000



We Need Your Support & Engagement

to Make the

Maryland Aerospace and Technology Sector Thrive!