



ANNUAL REPORT 2018-2021

Department of Economic Development & Planning

SUFFOLK COUNTY

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ANNUAL REPORT TO THE COUNTY LEGISLATURE AND THE COUNTY EXECUTIVE

Fall 2021

Forward by Jennifer Casey, Chairwoman

In accordance with Suffolk County Administrative code sec A14-6, the Suffolk County Planning Commission has prepared the following Annual Report which chronicles the activities of the Commission and includes “a survey of conditions in the County.”

The Suffolk County Planning Commission works with the County’s Planning Department on the County’s comprehensive planning and policy direction regarding land use and community development. The Commission seeks to foster places that are livable, inclusive, sustainable, and economically vital by guiding and managing growth at the county level. Through extensive engagement and dialogue with local municipalities, community stakeholders, and other public agencies, we consider issues related to land use, housing, public space, transportation, and economic development.

With respect to reviewed projects, the Commission processed 883 referrals from the municipalities pursuant to the Suffolk County Administrative Code A14. These included 61 Change of Zone; 407 Variances, 47 Subdivisions and 147 Code Amendments, 121 Site plans, just to name a few.

Suffolk County remains one of the most popular places to live, work, and shop in the United States. As a result there are significant challenges to continued growth including the high cost of living, increased congestion on roadways due to a 3.3% growth in population over the last ten years, the Covid-19 crises decreasing public transportation ridership, and the lack of affordable housing for low and middle income families.

In August 2021, the median list price of homes in Suffolk County, NY was \$549K, up 4.6% year-over-year. The median sale price was \$535K up 16.6% year-over-year. County home prices in the 2nd quarter of 2021 were higher than 90% of the rest of the nation. These statistics point to the need for additional affordable transit-oriented development and mixed-use projects in the County.

In order to keep our young people here, allow our older residents the opportunity to stay and attract more residents, we must rethink housing and look for opportunities to expand the type of housing stock available. The traditional one family home with a garage, big yard and a white picket fence is no longer the norm. Today, people are looking for affordability, flexibility and walkability.

The Commission expresses its gratitude to the County Planning Department Staff for their incredible expertise, thoroughness, and collaboration with the Commission.

The Commission engaged in various comprehensive planning activities in 2021 including: pursuing the County's Climate Change Guidelines, development of the Blueway, Lake Ronkonkoma watershed planning, and adoption of model codes for parking stall demand reduction, inclusive housing development, and big box to retail to housing overlay.

Additionally, we continued our partnership with Touro Law Center in conjunction with their Land Use Institute with various members of the Commission participating in The Role of County Planning Commissions in Regional Projects, Inclusive Housing: Successes and Challenges, Long Island Water Policy Overview: History, Current Efforts & Charting the Course Ahead.

In 2022 the Suffolk County Planning Commission plans more remote meetings in the Towns and Villages across Suffolk County as well as continued collaboration with other local organizations to allow the Commission to learn, grow and make Suffolk County a place where people want to live.

Suffolk County Planning Commission Overview

The core role of the Commission under state and county law is to identify and promote countywide land use values and planning priorities.

“Our Core Role...is to identify and promote countywide land use values and planning priorities.”

The Commission is comprised of 15 members who are nominated to four-year terms by the County Executive and are confirmed by the County Legislature.

Of the 15 Commission members:

- One represents each of the ten Towns in Suffolk,
- One represents Villages with population under 5,000
- One represents Villages with populations over 5,000
- There are three at-large representatives

2018-2020 Accomplishments

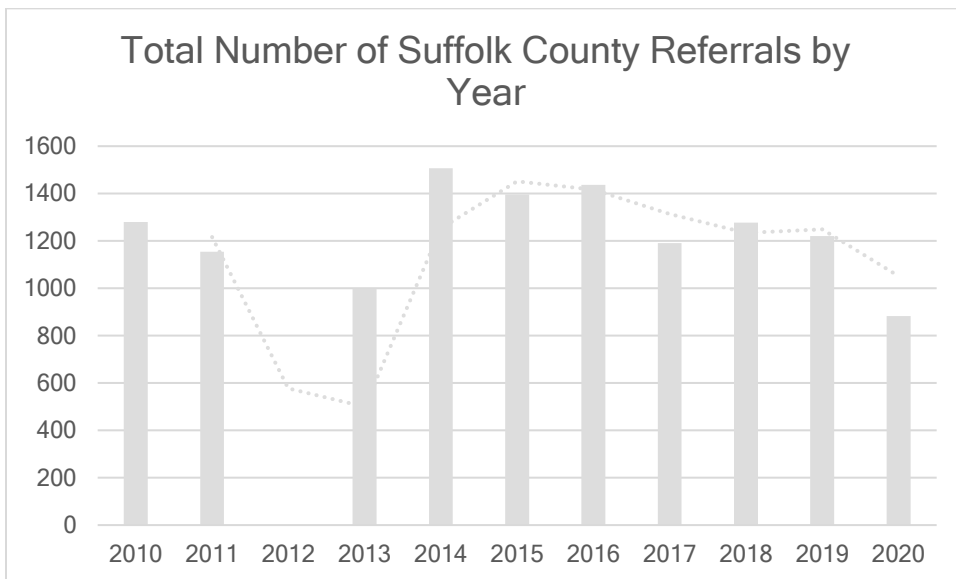
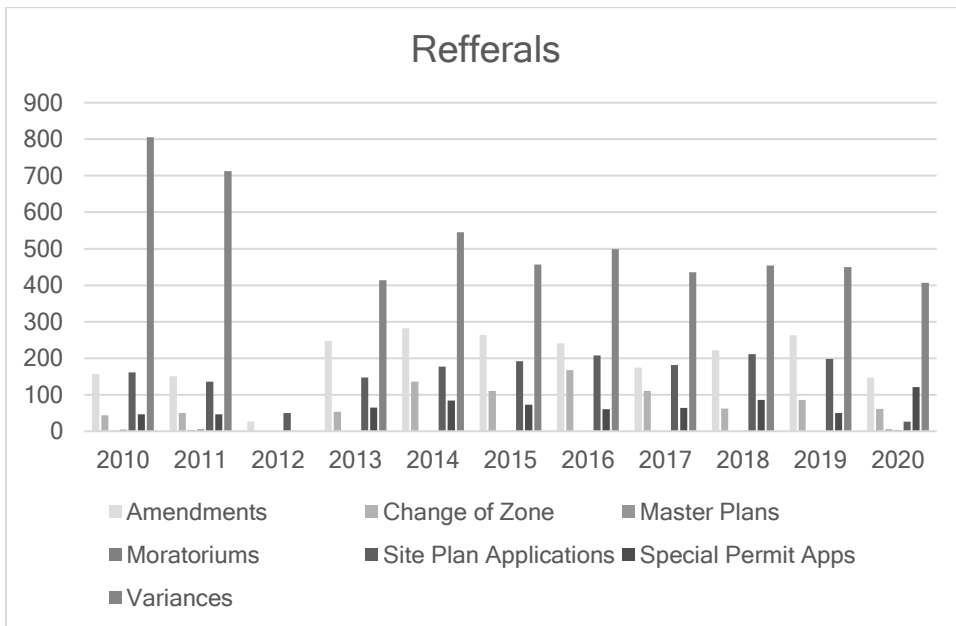
2018-2020 Suffolk County Planning Commission Referrals Processing

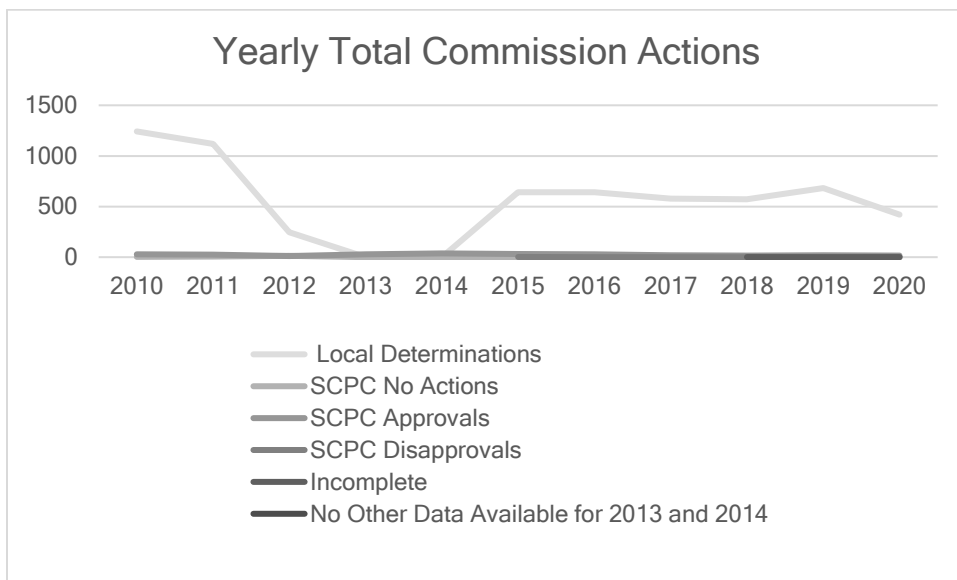
Zoning Referrals	2020**	2019	2018
Amendments	147	263	222
Change of Zone	61	86	62
Master Plans	5	0	0
Moratoriums	3	2	1
Site Plan Applications	121	198	211
Special Permit Apps	26	50	86
Variances	407	450	454
COU	5	9	8
IMA	0	0	0
SEQRA	61	114	122
ER	0		22
		1172	1188
Total Subdivision Referrals	47	51	89
ER			
TOTAL REFERRALS	883	1223	1277
COMMISSION ACTIONS			
SCPC Local Determinations	420	681	572
SCPC No Actions	1	5	1
SCPC Approvals	17	18	16
SCPC Disapprovals	1	0	1
Incomplete	1	0	1
TOTAL PC ACTIONS	440	704	591

**During Covid-19 Pandemic

Source: Suffolk County Department of Planning, Division of Planning & Environment

Below are graphic representations of the Planning Commission referral types and volumes.





With the advent of COVID - 19 Pandemic Protocol, in early 2020, Suffolk County Planning Commission's regularly scheduled meetings continued remotely as the County Department of Economic Development and Planning and Commission staff shifted to remote and hybrid workday and meeting processes.

Effective March 18, 2020, Commission staff quickly amended the Suffolk County Planning Commission Guidebook

<https://www.suffolkcountyny.gov/portals/0/formsdocs/planning/Publications/SCPCguidebk12r%206-30-20.pdf>

and utilized internal software to pivot to an electronic referral process for municipalities and instructed municipalities on the new referral process. In accordance with an amended section 3.2 (Form of Delivery) of the Guidebook, all municipalities are required to submit referrals made in accordance with General Municipal Law Section 239 and the Suffolk County Administrative Code Article XIV to the Suffolk County Planning Commission electronically. Commission staff now generally reviews referrals in a paperless environment and for the time being, conducts the Suffolk County Planning Commission meetings virtually.

The Suffolk County Planning Commission, within this time period, has also adopted a Model Code applicable to Transit Oriented Design with regard to Parking Stall Demand Reduction (PSDR) techniques. The Model Code is recommended to be employed to assist in the reduction of motor vehicle trip generation and parking demand. The Suffolk County Planning Commission "model code" and report on such PSDR techniques recommends that no building or structure should be constructed, used or occupied without the adoption of Parking Stall Demand Reduction (PSDR) techniques conditioned, through covenants and restrictions, on land use and development approvals issued by municipal planning boards. For convenience a link to the model code is provided below:

<https://www.suffolkcountyny.gov/portals/0/formsdocs/planning/SCPlanningCommission/2019/PSDR%20Final%20Draft%20103019.pdf>

Area created may provide additional land for stormwater treatment via natural methodologies. (see Suffolk County Planning Commission publication Managing Stormwater- Natural Vegetation and Green methodologies)

<https://www.suffolkcountyny.gov/portals/0/formsdocs/planning/SCPlanningCommission/2015/Managing%20Stormwater.pdf>

The Suffolk County Planning Commission's most recent undertaking was to amend the Suffolk County Planning Commission Guidebook to add a new section (4.10) on Site Specific policies for Climate Change:

<https://www.suffolkcountyny.gov/portals/0/formsdocs/planning/SCPlanningCommission/2021/SC%20Climate%20Change%20Guidance%20August%202021.pdf>

Rising sea level, more frequent coastal flooding, including sunny day flooding, increased coastal erosion, drought and wildfires, more frequent hurricanes and extreme rain events with local street flooding, severe winter storms, surface water eutrophication, harmful algae blooms and ocean acidification are some climate issues presenting itself on Long Island. The model guidelines by the Commission bring regional considerations to individual projects through recommendations for best management practices on a site by site basis.

Please see Suffolk County Department of Economic Development and Planning - Arthur Kunz Library, for all Publications, the Division of Planning and Environment webpage, and the Suffolk County Planning Commission webpage for additional recent reports.

COUNTY OVERVIEW

According to the U.S. Census Bureau, the County had a population of 1,525,920 in 2020, an increase of 2.1% since the 2010 Census figure. Between 2000 and 2010, the County's population increased by 5.2%. A slow rate of population growth is expected in the near future. The County's population is the largest of any county in New York State outside of New York City. According to the U.S. Census Bureau, the County ranks 26th in population out of all 3,142 counties in the United States, and has a larger population than 12 states.

According to the U.S. Bureau of Economic Analysis, total personal income of all County residents amounted to \$106.1 billion in 2019, an increase of 4.1% over the 2018 figure. The County's 2019 per capita personal income was \$71,911, ranking 5th highest out of the 62 counties in New York State and 109th (in the top 4%) out of all counties in the nation.

As the table below shows, the median household income in the County was \$106,228 in 2019, placing it 62% higher than the median household income in the nation as a whole and ranking it in the top 1% out of all counties in the nation. In addition, the percent of persons living in poverty in the County was 6.5% in 2019, significantly lower than the State and the United States.

Median Household Income and Poverty Rate in the County, with Comparisons

Area	2014		2019	
	Median Household Income	Persons Below Poverty (%)	Median Household Income	Persons Below Poverty (%)
Suffolk County	\$86,266	7.4%	\$106,228	6.5%
Nassau County	99,035	6.4	118,453	5.4
New York State	58,818	15.9	72,108	13.0
United States	53,657	15.5	65,712	12.3

Source: U. S. Census Bureau (American Community Survey)

According to the U.S. Bureau of Labor Statistics, the average weekly wage for County residents in the fourth quarter of 2020 was \$1,454. Per the NYS Department of Labor Quarterly Census of Employment and Wages, the County's average wage for 2019 amounted to \$61,948, an increase of 10.2% in the five years since 2016. This increase was greater than the rate of inflation over the same period, which was 7.3%.

According to the U. S. Census Bureau, the County has a relatively well-educated population. Among residents age 25 and over in 2019, 91% were high school graduates and 36% held a bachelor's degree or higher. These figures compare to 88% and 32%, respectively, for the nation as a whole.

ECONOMIC INDICATORS

Demographics

- According to the U. S. Bureau of Economic Analysis, the County had a gross domestic product of \$97 billion in 2019. Its gross domestic product increased by 17.3% in the five-year period from 2013 to 2018. In real inflation adjusted terms, the five-year increase was 5.0% in that period.
- According to the New York State Department of Labor, as of April 2021, there were 1,228,000 jobs in the region, an increase of 197, 100 or 19.1% since April 2020, a dramatic increase.
- While stabilizing, growth continues, as between June 2021 and June of 2020 jobs have increased at the rate of 9.1%.

The following table shows employment for the region by industry sector:

Non-Farm Employment in the Nassau-Suffolk Region, by Industry, in Thousands

Industry	June 2021	June 2020	% Change
Goods Producing			
Natural Resources, Mining & Construction	73.1	73.4	-0.4%
Manufacturing	67.4	64.4	+4.7%
Service Providing			
Wholesale Trade	60.9	59.9	+1.7%
Retail Trade	143.4	126.2	+13.6%
Transportation, Warehousing & Utilities	39.9	34.3	+16.3%
Information	14.3	14.0	+2.1%
Financial Activities	68.5	66.8	+2.5%
Professional & Business Services	167.4	151.9	+10.2%
Education & Health Services	260.4	244.4	+6.5%
Leisure & Hospitality	111.4	81.0	+37.5%
Other Services	49.8	42.6	+16.9%
Government	<u>197.5</u>	<u>190.5</u>	<u>+3.7%</u>
TOTAL	1,254.0	1,149.4	+9.1%

Source: New York State Department of Labor

- As of June 2021, the County employment rate was 5.0%, reflecting a decrease from 5.4% in April of 2021. This was lower than the 6.1% figure recorded in March 2021, and substantially lower than the peak of 17.5% in April of 2020.
- The County unemployment rate in April 2021 was lower than the rate in the State (8.2%) and in New York City (10.8%). As of April 2021, there were 710,700 employed residents in the County. This figure was 20.2% higher than the April 2020 figure (591,200).
- While stabilizing, growth continues, as between June 2021 and June of 2020 jobs have increased at the rate of 9.1%.

In its annual review the New York State Comptroller confirmed **Suffolk County Industrial Development Agency** is a leader in job creation, per 2018 data. The Suffolk IDA's 137 active projects resulted in the creation of the second largest number of new jobs in the State, 12,881 jobs and state-wide is second only to NYC. SCIDA's average tax assistance per job created was also significantly lower, \$90 compared to NYS's \$4,378, and the lowest in the State. The following table chronicles the successes of the Suffolk County Industrial Development Agency (SCIDA):

SCIDA Case Highlights: Companies in Suffolk County

Grace Industries LLC	In August 2017, Grace Industries announced a corporate consolidation and SCIDA issued preliminary approval for a transaction to help the company establish a national corporate office. This \$17 million company investment consolidates several of the civil engineering firm's existing offices into a new Melville headquarters and adds 75 new jobs. In 2019, the project expanded at an additional \$3,700,000. Construction was completed in 2020.
Contract Pharmacal	Back in 2010 the company had 450 employees, and IDA assistance kept them from a move to Florida and encouraged the commitment to add 150 jobs. With a capital investment of over \$40 million to date, they now have 1383 employees in 10 buildings in Suffolk County.
Bactolac/Sciegen	Currently has 712 employees, plans to add 108 in the next two years. Current capital investments are \$15.5 million. 244 jobs were added in the last five years, and employment has increased by 94 over projection: in 2015, \$17.5 million investment was determined necessary to add 150 new employees to their existing workforce of 468.
The Estee Lauder Companies	Assisted Estée Lauder in expanding its 12 acre footprint in Suffolk County with the opening of a 51,576 square-foot technical engineering facility, a capital investment of nearly \$15 million. Retained more than 2500 jobs and added 31 new jobs, keeping an annual payroll of more than \$309 million in Suffolk County. Has been a major employer in Suffolk County for the past 50 years.
Hartz Mountain	Acquired 53-acre site in Melville on the 110 corridor to develop two industrial warehouses totaling close to one million square feet. Capital investment of close to \$190,500,000.

Source: Suffolk County Industrial Development Agency, 2021

The following table lists noteworthy larger-scale firms in the County and employment. Many of have made multiple “Best of” Employers lists.

Mid-size to Large Employers in Suffolk County

Firm Name	Industry	Location	Regional Significance	Total Number of Employees
Canon	Optical, Imaging and Industrial Products Medical Products and Services	Melville	US Headquarters	182,000 (US)
Northwell Health	Health Care System	Melville	Dedicated Ambulatory Surgery Center, 500+ employees	70,000
Henry Schein	Telecommunications, Medical Products and Services	Melville	Global Headquarter Campus, 1,200+ local employees	20,000
Zebra Technologies	Marking, Tracking & Printing Technologies	Holtsville	Top Workplaces 2020 honor by Newsday for the third consecutive year	7,400
Leviton	Electrical Products & Services	Melville	Global Headquarters	6,000
MSC Industrial Direct	Metalworking Products and Services	Melville	Customer Support Center and Headquarters	6,000
The Bountiful Company (Nature's Bounty)	Vitamins and Nutritional Products	Ronkonkoma	Corporate Headquarters	4,500
Verint	Customer Analytics Software & Hardware products	Melville	Global Headquarters	4,300 +
Geico	Insurance	Woodbury	Location of 2,800 local employees	40,000 +
American Portfolio Group	Financial Services	Holbrook	Five years ranked Best Companies to Work for in New York	1,000+
Bohler Engineering	Civil Engineering Consulting	Hauppauge	Six years ranked Best Companies to Work for in New York	1,000+
Kurt Weiss Greenhouses	Growing & Affiliate Delivery	Center Moriches	US headquarters, fourth-largest grower in the U.S.	1,000
Dime Community Bank	Business Banking & Commercial Lending	Hauppauge	Merger expanded BNB bank from East End origins	800+
SupplyHouse	Plumbing/HVAC Products Supplier	Melville	US Headquarters, ranked Best Companies to Work for in New York	500+

- According to the U.S. Bureau of Labor Statistics, there were 52,824 private business establishments located in the County in the first quarter of 2020, an increase of 4% since the first quarter of 2016 (50,596).
- The County has a mix of large and small employers. According to the U.S. Census Bureau, as of 2019, there were 25 businesses in the County that employed 1,000 or more persons yet a majority are small businesses, as 62% have 5 or fewer employees and 78% employed fewer than 9 persons. In addition, according to the U.S. Census Bureau, in 2018, the County had 137,044 “non-employer” firms, mostly self-employed individuals. The number of these businesses increased by 11% in the five years between 2013 and 2018.

County Growth Initiatives (post Covid-19)

The County is experiencing continued economic recovery from the COVID-19 pandemic lockdowns. The number of unemployed residents peaked in April 2020 at the height of the pandemic at 123,300, however, the number of unemployed dropped precipitously by 76,400 to 46,400 by September 2020, to 40,600 in April of 2021. The unemployment rate in the County dropped commensurately, from an April 2020 peak of 16.5% to 6.2% in September 2020, to 5.4% for April 2021.

In July 2020, the Nassau County Industrial Development Agency and Suffolk County Industrial Development Agency released a study, conducted by HR&A Advisors (the “HR&A Study”), on the economic impact of the COVID-19 pandemic in the Long Island region. The region's hospitality sector experienced the greatest decline during initial months of the crisis, with employment down two-thirds. Since the initial impact of the COVID-19 pandemic, the hospitality industry has performed well in comparison to regional counterparts with regards to room and occupancy rates.

- In March 2020, the County launched a **Business Recovery Unit** to address concerns and questions that arose for businesses amidst the outbreak. Suffolk County Department of Labor, Licensing and Consumer Affairs employees were allocated to answer questions and track data and information as provided by local businesses.
- A call line (Suffolk 311), dedicated email (Business.Recovery@suffolkcountyny.gov), and web presence (suffolkcountyny.gov/bru) were established to offer guidance on reopening, provide guidelines set forth by the State, and consolidate available resources for employers and their workforce.
- In May 2020, the County and Stony Brook University launched **Suffolk Forward**. The initiative consists of several differing programs designed to support small businesses during the COVID-19 pandemic. Businesses can receive assistance in implementing new technology into their business, speak with professors on a range of business topics, sell gift cards to local residents, participate in business response and recovery webinars and utilize the Suffolk Forward Job Board to find a job, post a job or access career resources.
- The **Technology Enhancement Assistance Program** was launched in partnership with the Stony Brook Small Business Development Center (“SBDC”) and Stony Brook University College of Business and College of Engineering & Applied Sciences (“CEAS”) to help small business owners in the County enhance online technology capabilities to compete in a rapidly increasing e-commerce environment.

- Through the County's first round of its **COVID-19 Small Business Assistance Program**, 67 small businesses located across the County have received a total of nearly \$500,000 in grant funding. Awardees include gyms, salons, restaurants, and bars. A second round of funding was opened in April 2021 and the County hopes to award close to another \$500,000 in grants in round two.
- The County received \$7 million in funding through the **Federal Emergency Rental Program**. In addition, the County allocated \$575,000 from Community Development funds for Emergency Rental Assistance.



Source: Offshore Wind, UK. Photo by Nicholas Doherty, Unsplash

Innovation & Technology

The County is well positioned to foster innovation as the home of multiple key science and research institutions. Cold Spring Harbor Laboratory is shaping contemporary biomedical research and education with programs in cancer, neuroscience, plant biology and quantitative biology. The private, not-for-profit laboratory employs 1,000 people including 600 scientists, students and technicians, hosts more than 12,000 scientists from around the world each year and has won eight Nobel Prizes. Brookhaven National Laboratory (“BNL”) is a multidisciplinary laboratory with seven Nobel Prize-winning discoveries, 37 R&D 100 Awards, and more than 70 years of pioneering research. BNL employs more than 2,500 people, attracts more than 5,000 guest researchers annually, and regularly welcomes more than 30,000 students and teachers for education and workforce development programs each

year. Stony Brook University (“SBU”) became a partner in managing BNL for the U.S. Department of Energy (“DoE”) in 1998, and encourages cooperative initiatives that delivers discovery science and transformative technology to power and secure the nation’s future.

In January 2020 the DoE announced that a \$1.6 billion electron-ion collider will be constructed at BNL. The facility is expected to employ 1,000 people and attract nuclear research scientists from around the world to help them learn about the inner workings of the atomic nucleus. Construction of the facility is expected to take 10 years. NYS committed \$165 million in grants to support BNL’s bid for the collider, \$100 million of which will support targeted upgrades of existing infrastructure, including roads and utilities essential for the collider facility. This engineering and construction activity is anticipated to be performed by New York-area firms and subcontractors, drawing on local suppliers of labor and material.

Suffolk County is the site of two of New York State’s five off-shore wind projects in development, Sunrise Wind and South Fork Wind Farm. Through a partnership between SUNY’s Farmingdale State College and Stony Brook University, skilled workers will be trained as part of the largest public investment in offshore wind workforce development by any state in the U.S. Sunrise Wind, estimated operational as of 2024, will connect to New York’s electricity grid at the Holbrook Substation at an 880-megawatt capacity. The South Fork Wind Farm, an Ørsted and Eversource commercial partnership, is expected to be New York State’s first operational offshore wind farm, operational by the end of 2023. With 15 turbines and a state-of-the-art transmission system, it will generate enough clean energy to power 70,000 average homes and offset tons of emissions each year, helping to meet the Town of East Hampton’s 100% renewable energy goal.

In July 2020, the DoE committed \$115 million to BNL to establish one of five National Quantum Information Science Research Centers. BNL will lead a team of researchers from SBU, IBM and MIT to help resolve performance issues with today’s quantum computers where quantum computers outperform classical computers. Previously, the DoE selected BNL for construction of the \$912 million National Synchrotron Light Source II (“NSLS II”) facility, which opened in 2015.

Researchers at SBU and BNL are also working on the building blocks of a “quantum internet,” which, still decades away from fruition, would be capable of sending enormous amounts of data faster than the speed of light. Qconnect LLC – a three-year-old spinoff company from the Quantum Information Technology group at SBU – is licensing quantum networking technology developed at SBU. The company plans to market a quantum memory device that can operate at room temperature. In October 2020, BNL also announced they are making progress on several fronts in the battle against COVID-19, the global pandemic sparked by the emergence of a novel coronavirus late last year. This work is part of a worldwide effort to understand the virus and the factors that affect its spread with the aim of devising treatments and other mitigation strategies.

Accelerate Long Island, an initiative created by the Long Island Association (“LIA”), connects the region’s research institutions with businesses to aid local technology startups. Broad Hollow Bioscience Park at Farmingdale State College, a 102,000 square foot incubator for biotech companies and Stony Brook University’s 62,000 square foot Long Island High Technology Incubator are START-UP NY state tax-free zones. Stony Brook’s incubator provides new technologically-innovative companies with support services and resources to foster their growth.

The Suffolk County Economic Development Corporation, in partnership with the Suffolk County Department of Labor, is advancing plans for a Technology Workforce Incubator in Wyandanch. This facility will provide economic empowerment to local residents while developing a local workforce for

Long Island's tech industry, and it is supported by \$210,000 in Empire State Development funding and an additional \$250,000 in funding from the Dormitory Authority of the State of New York.

Major Development Projects

- Ronkonkoma Hub.** Multiple major construction and redevelopment projects are currently taking place in the County. The 54-acre area adjacent to the Ronkonkoma LIRR station is currently being redeveloped as a \$700 million mixed-use transit oriented development known as the Ronkonkoma Hub. As of 2021 Ronkonkoma Hub has entered its second phase, comprising an additional 544 residential units, 16,000 SF of office space, and 104,000 SF of retail space. Upon completion, this development will contain 2.2 million square feet of mixed-use development and create more than 1,000 temporary and permanent jobs. An extension of sewer service to the area has been approved and \$50 million in State funding has been earmarked for infrastructure at the site. At full completion in 2027, the Ronkonkoma Hub is expected to include 1,450 apartments, 20% will be affordable, 195,000 square feet of retail space and 360,000 square feet of office space, and 60,000 sf of flex space. Significant progress has been made, with the first 489 of the projected 1,450 residential units completed in the past two years.
- Midway Crossing** is a transformative \$2 billion, 2.4 million square foot transit-oriented public/private partnership development that will generate over \$1 billion in private investment, 9,300 permanent jobs and over 13,000 construction jobs. Strategically located between the Ronkonkoma Train Station - one of the Long Island Rail Road's busiest stations - MacArthur Airport, the Nicolls Road I-Zone Corridor and the Long Island Expressway, Midway Crossing will not only connect major regional transportation assets, but educational and research assets in Stony Brook University, Brookhaven National Lab, and the expanding life sciences industry. Served by an Electric Microgrid powered by Renewable Energy sources, the project will be anchored by a Convention Center with a 120,000 sf meeting space, a STEM (Science, Technology, Engineering & Math) Center, sports and entertainment venues, and specialty retail, all generating over \$2.7 billion in annual economic impact. Midway Crossing is perfectly positioned to take advantage of the LIRR's multi-billion dollar investment in Second Track, Third Track (LIRR Expansion Project) and East Side Access, all of which will put this site less than an hour away from Grand Central Terminal with further connections to Metro North and the New York City Subway. It will also serve as a catalyst for MacArthur Airport to greatly expand air service to the Long Island and greater New York region.
- Downtown Wyandanch.** For the redevelopment of downtown Wyandanch in the Town of Babylon, the Town assembled 48 properties and a \$500 million mixed-use transit-oriented redevelopment project adjacent to the LIRR station, with sewer service extended to the downtown area. The new LIRR train station and pedestrian overpass were completed in 2018, and the development's \$137 million first phase was completed in 2015, including a multi-level parking facility, a one-acre public park as central pedestrian plaza and two multi-story mixed use buildings with a combined 177 rental units, 121 of which are affordable housing and 35,000 square feet of retail space. The residential units throughout the development have consistently experienced very low vacancy rates. In 2020, a 119-unit apartment building north of the plaza was completed. Also in 2020, construction began on a 94-unit affordable independent living development with in-house social-service and programs. This facility is operated by Selfhelp, Inc., one of New York's oldest and most respected not-for-profit senior service agencies. Future development at the site includes the Wyandanch Healthy Living Center, a joint collaboration between the YMCA of Long Island and Hudson River Health to provide a new community YMCA and health center that represents a new holistic approach to health care

and healthy lifestyles, and brings much needed health and child care resources to the Wyandanch community. This project is supported with State and County grants totaling more than \$32 million.

- **Hamptons Business District.** In Westhampton, the County has leased approximately 53 acres at Gabreski Airport to Rechler at Gabreski, LLC for the construction of the Hamptons Business District, for light industrial and research & development office space at the Hampton Business District, a complex of at least 6 buildings totaling 470,000 square feet. To date, three buildings in the development have been completed, totaling nearly 200,000 square feet of space. Construction is expected to begin on a fourth building in the summer of 2021 totaling 91,000 square feet. At completion, this eight building business park will total approximately 500,000 square feet and is expected to employ 1,100 people. The District is expected to house approximately 650 employees. Total capital investment in the project is expected to exceed \$30 million. In 2017, the Suffolk County IDA closed on the second of the Business District's buildings, a 67,000 square foot facility that is anticipated to employ approximately 40 individuals. Total private capital investment in said building is estimated to be \$9.6 million. Additional lease activity within the district is also underway.
- **Smithtown Business District.** New York State is investing \$20 million in the Smithtown Business District Sewer Improvement Area to install sanitary infrastructure in the business district, as well as \$20 million in the Kings Park Wastewater Treatment Facility, to be located in their central business district, adjacent to the LIRR station. Lack of sewer infrastructure has severely limited redevelopment and business growth, leading to numerous vacant storefronts in a once vibrant business district. The design for the Smithtown Sewer Project is underway and the design report is 75% complete. Land acquisition is required for treated effluent disposal and a suitable site is being evaluated. Once land suitability is confirmed, site acquisition, final design and sewer district extension processes can be completed, including a vote by the resident electors. The County Legislature approved extension for Sewer District 6 for Kings Park. If approved by referendum, the construction contract should be let in 2022. The County and stakeholders are finding an appropriate site for recharge beds for the Smithtown Sewer Project.
- **Huntington Station Neighborhood Revitalization.** In Huntington Station, revitalization continues on New York Avenue near the LIRR station. Northridge, a three-story, mixed-use building of 16 residential units and 6,000 square feet of ground floor retail space was completed in 2018 and Columbia Terrace (14 affordable condominiums for Veterans) was recently completed. Gateway Plaza, a three-story mixed-use building with 66 residential units and 16,500 square feet of ground floor commercial space was completed in 2020. Other proposals in the area include 49 affordable artists' lofts, a proposed hotel and a 100,000 square foot medical office building.
- **Heartland Town Square.** A \$4 billion mixed-use development, Heartland Town Square, has been proposed on 452 acres of a surplus portion of the former Pilgrim State Psychiatric Center in Brentwood, located at the intersection of the Long Island Expressway and the Sagtikos Parkway. Proposed to be constructed in phases, at completion the development is to include 1,030,000 square feet of lifestyle retail space, 9,130 units of mid-rise rental housing, 3,239,000 square feet of office space, a hotel, and an aquarium. The change of zoning for a 116 acre portion of the site was approved by the Town of Islip in 2017, but the developer has not yet begun construction. In 2020, the Suffolk County Sewer Agency granted a one-year extension for County Legislature approval of the sewer connection agreement, which it will look to extend again in 2021.
- **Central Islip Psychiatric Center Redevelopment.** The long-term redevelopment of the former Central Islip Psychiatric Center is continuing. Projects built on this site include the Long Island Ducks baseball team ballpark and a federal courthouse; the Touro Law School building; the renovation of

a former hospital building into a 175,000 square foot office building; and more than 1,500 units of rental and owner-occupied attached housing. A 268-unit apartment complex, Hudson Place, completed in 2021 and does include former Psychiatric Center buildings. On former Psychiatric Center property, a new Courtyard by Marriott opened in 2018, and Ascent Pharmaceuticals and AlphaMed Bottles built a \$47 million manufacturing facility in two adjacent buildings in 2018. Also in Central Islip, Steel Equities plans to develop a new 90-acre industrial park at the former New York Institute of Technology site.

- **Redevelopment in Yaphank.** In Yaphank, a \$100 million, 400,000 square foot expansion to Amneal Pharmaceuticals' industrial building in Yaphank was completed in 2015. The Boulevard at Yaphank, a large development consisting of retail, office, and 850 residential units is currently under construction near the intersection of the Long Island Expressway and William Floyd Parkway near Brookhaven National Laboratory. In Shirley, the Triple Five Group purchased the 105-acre former Dowling College campus in 2018, located adjacent to the Brookhaven Town-owned airport. Triple Five plans to renovate and upgrade an existing 65,000-square-foot building on the campus to create an industry-university research and development center for advanced transportation technology.
- **Brentwood Community Center.** The State will provide \$15 million to help Suffolk County build a new community center in the hamlet of Brentwood. This community center will combine several community service functions including: workforce development and training, social services, labor services, after-school programs and a recreation component. The County is conducting stakeholder outreach and evaluating potential site alternatives in the hamlet.
- **Downtown Central Islip.** Central Islip in the Town of Islip was named the recipient of New York State's 2018 Downtown Revitalization Initiative award. As part of this award, Central Islip received \$10 million in funding to enhance its Carleton Avenue central business corridor with sewers, new mixed-use buildings and a historic walking trail, bringing much needed investment into this distressed corridor. The Suffolk County Landbank is facilitating the disposition of a Superfund property adjacent to this project to facilitate a larger site assemblage for redevelopment.



Source: Patchogue Village, Photo by Samantha Kennedy, Unsplash

Economic Base

The County has a substantial commercial office building market. According to CBRE, a multinational real estate firm, the office vacancy rate in the County was 14.3% in the 1st quarter of 2021, yet rental rates have consistently increased at 8% since 2016, to \$25.09 in the 1st quarter of 2021. The County's office vacancy rate continues to outperform the Northern New Jersey, Westchester County (NY), and Fairfield County (CT) markets. The average office space rental rate in the County was \$25.75 per square foot in the 3rd quarter of 2020, an increase of 1.5% over the 3rd quarter 2019 figure. According to the County's Department of Economic Development & Planning, there are 22.4 million square feet of commercial office buildings located in the County. This figure includes more than 900,000 square feet of new office space constructed in the five years since 2015. An additional 2.6 million square feet of office space has been proposed for future construction.

The County has significant industrial space totaling 107.8 million sq. ft., according to the commercial real estate advisory firm Newmark Knight Frank. The industrial market fundamentals remained very strong in the County through the 3rd quarter of 2020. According to Newmark, the County's 3.9% industrial vacancy rate in the 3rd quarter of 2020 was among the lowest in the nation and the industrial asking rent was \$12.02 per sq. ft., an increase of 5.9% in the past year. The largest concentration of industrial space in the County is located in Hauppauge, with more than 13 million square feet of space. Additionally, significant light industrial space is located in the area around Long Island MacArthur Airport in Ronkonkoma and Bohemia and further east in the Yaphank area.

The Route 110 Corridor in western Suffolk County is a hub of the Long Island business community. According to the County's Department of Economic Development & Planning, the hamlet of Melville,

located on Route 110, has 9.7 million square feet of office space and 1,485 acres in Melville and East Farmingdale are developed with light industrial uses. Sandoz Pharmaceuticals, formerly known as Fougera, spent \$88 million through 2021 to consolidate Melville and Hicksville manufacturing facilities in Melville, retaining all 400 employees. They were also recognized as a Top Global Employer in 2019 by the Top Employer's Institute, a global authority on corporate excellence. Melville is also home to large corporate headquarters, such as Henry Schein Inc., a Fortune 500 distributor of healthcare products and services. Melville is the U.S. headquarters for Canon and Nikon and a regional headquarters for Fortune 500 cosmetics producer Estee Lauder and large banks including Capital One and TD Bank. After Melville, the next largest concentrations of private office space in the County are located in Hauppauge (3.8 million square feet), Islandia (1.8 million square feet), Bohemia (900,000 square feet), and Ronkonkoma (900,000 square feet).

There are 11 full service hospitals located in the County. Several of these hospitals have spent or are spending hundreds of millions of dollars on major construction projects to expand and modernize their facilities. For example, Good Samaritan Hospital in West Islip has announced plans to invest \$525 million for a major expansion. Stony Brook University Hospital ("SBUH") is undergoing a \$450 million expansion of its hospital campus, including a new cancer center, the expansion of its emergency, surgical, and obstetrics departments, and a major expansion to its Children's Hospital that opened in 2019. In 2020, Peconic Bay Medical Center in Riverhead completed a \$67 million expansion. A \$60 million cardiac care center at Long Island Community Hospital in Patchogue opened in 2016 and a \$53 million expansion of Huntington Hospital's emergency room opened in 2017. A completely new \$305 million Stony Brook Southampton Hospital is proposed for completion in 2025, replacing the existing Southampton facility.



Source: Amagansett, Photo by Tommy Kwak, Unsplash

According to the County's Department of Economic Development & Planning, there are 282 hotels, motels and inns located in the County. Together these lodging properties have 12,106 rooms. Approximately 20% of these rooms are seasonal (open for half the year in the warmer months) and these seasonal rooms are located primarily in the eastern end of the County. In the five years since 2015, more than 400 lodging rooms have been added in the County. A 131 room Marriott Residence Inn in Riverhead opened in 2017, a 125-room Courtyard by Marriott opened in Central Islip in 2018, a

128-room Homewood Suites opened in Lake Ronkonkoma in 2019 and a 146-room Home2Suites by Hilton opened in Yaphank in 2019. Proposals have been made for several additional new hotels in the County, which could result in an increase of more than 2,000 hotel rooms in the County.

The County is a major retail market, with a total annual retail demand of \$27.3 billion in sales reported in 2020, according to Gale Business Insights. Retail sales per household in the County amounted to \$53,845 in 2020, 8.9% higher than the nation as a whole and ranking it among the highest markets in the country. Between 2012 and 2017, per capita retail sales in the County increased by 20.8%, compared to 13.9% for the nation as a whole. Three regional malls and two regional outlet centers serve the County. According to the County Department of Economic Development & Planning, shopping center space in the County totals 41.0 million square feet and an additional 2.8 million square feet of new retail space is proposed for construction, including a new Walmart supercenter planned in Yaphank. Many of the County's downtown business districts have emerged as attractive and vibrant centers for dining and entertainment. Ground floor retail space in the County's downtown centers totals approximately 9 million square feet.

The following table lists the major retail centers in the County:

Major Retail Centers in the County

Retail Center	Location	Anchor Stores
Smith Haven Mall	Lake Grove	Macy's, Dick's, H&M, Barnes & Noble.
Walt Whitman Shops	South Huntington	Macy's, Bloomingdales, Saks, Pottery Barn
Westfield South Shore	Bay Shore	Macy's, Dick's, Forever 21, Footlocker
Tanger Outlets at the Arches	Deer Park	Saks Off 5 th , BJ's, Regal Cinema, Christmas Tree Shops
Tanger Outlet Center	Riverhead	Saks Off 5 th , Pottery Barn, Nike, Polo, Banana Republic
Huntington Business District	Huntington	Wild by Nature, Stop & Shop, Rite Aid, Value Drugs
Southampton Business District	Southampton	Hildreth's, Stop & Shop, CVS, Rite Aid, Citarella
Great South Bay Shopping Center	West Babylon	Old Navy, Bed Bath & Beyond, Marshalls, JoAnn
Airport Plaza	East Farmingdale	Home Depot, Staples, Stew Leonard's, PetSmart
Riverhead Centre	Riverhead	Home Depot, Best Buy, Michael's, ShopRite, Petco
Bay Shore Business District	Bay Shore	Boulton Center for the Performing Arts, Bridal Suite
Veterans Memorial Plaza	Commack	Target, Whole Foods, LA Fitness, Hobby Lobby
Babylon Business District	Babylon	Village Pharmacy, Sole Provisions, Plesser's Appliance
Centereach Square	Centereach	Walmart, JoAnn, Big Lots, Party City, Planet Fitness
Crooked Hill Commons	Commack	Home Depot, Walmart, Kohl's
Sayville Plaza	Bohemia	Old Navy, Bed Bath & Beyond, Jennifer Furniture
Islandia Center	Islandia	Walmart, TJ Maxx, Stop & Shop, Dave & Buster's
Gardiner Manor	West Bay Shore	Target, King Kullen, Staples, HomeGoods, Old Navy
Patchogue Business District	Patchogue	Patchogue Theatre for the Performing Arts, Burlington
Gateway Plaza I and II	North Patchogue	Marshalls, Best Buy, Michael's, HomeGoods, Dick's
Riverhead Business District	Riverhead	Long Island Aquarium, Music & Arts

Town Center at Central Islip	Central Islip	Home Depot, Target, Davis Visionworks
Big H Shopping Center	Huntington Station	Home Depot, Marshalls, Old Navy
South Port	Shirley	Kohl's, Stop & Shop, Michael's, Marshalls
Port Jefferson Business District	Port Jefferson	Theatre Three, Ecolin Jewelers, LI Explorium
Nicolls Plaza II	Centereach	Target, Home Depot, Best Buy, Guitar Center
Bridgehampton Commons	Bridgehampton	K Mart, TJ Maxx, King Kullen, Staples, Marders

Source: Suffolk County Department of Economic Development & Planning, Division of Planning & Environment.



Source: North Fork, Photo by Juliana Malta, Unsplash

Tourism is a multi-billion dollar industry in the County. The County represents 54% of the region's tourism sales, with \$3.4 billion in direct tourism spending, as of 2019, according to the consulting firm Tourism Economics. Tourism supports 43,000 local jobs in the County and generates \$394 million in local and state tax revenues annually and has consistently increased at a growth rate of 3.1% since 2017. Before the COVID-19 pandemic hit the Long Island region in the spring of 2020, the County's hotel businesses were enjoying strong and steady growth. According to Smith Travel Research, the occupancy rate of the County's hotels was 68.7% in 2019, slightly higher than the 67.7% figure in 2018 and average daily room rates in 2019 increased in the same period by 7.4% to \$163. While the pandemic had a substantially negative effect on this industry on Long Island, growth signs are emerging. As of Q1 2021, Long Island's RevPAR is above the natural average at 64% compared to 60.3%, of 2021 RevPAR (revenue per available room) as a percent of 2019, according to CBRE's U.S. Hotels' 2021 Lodging Forecast.



Source: North Fork, Photo by Neil Daftary, Unsplash

Suffolk County is home to two out of three of Long Island’s wine growing AVAs, with a significant number of wineries located on the North Fork. It is planted nearly exclusively with *vitis vinifera* grapes, classical varietals as per the Bordeaux region of France. Given technological and growing improvements, Long Island is increasingly acknowledged and awarded for quality production while establishing presence amidst the global wine market. “Over the last 20 years, we have seen a strong commitment by several winery owners to give their teams everything they need to succeed,” says Paumanok Vineyards’ Kareem Massoud, Long Island’s first second-generation winemaker.

49 wine grape varieties have been evaluated in the research vineyard at the Long Island Horticultural Research and Extension Center in Riverhead. Long Island Sustainable Winegrowing is the first certified sustainable viticulture program on the east coast, using international standards of sustainable practices in quality wine-grape production that have been refined for the northeast. According to the County Department of Economic Development & Planning, the County has 71 wineries, 38 craft breweries (the most of any county in the State), 6 cideries and 6 distilleries. Long Island is the youngest and fastest-growing wine region in New York State, and NYS is the third largest wine growing region in America, only behind California and Washington. At the 2021 New York Wine Classic, Long Island winery Pindar took best-of-show Governor’s Cup, and Paumanok was presented with the Winery of the Year award. According to the New York Wine & Grape Foundation the County’s wine and grape industry generates \$686.65 million in direct economic activity and draws 763,700 tourist visits annually.

The County has a significant agricultural sector. According to the most recent U.S. Census of Agriculture, the County has more than 30,000 acres of active farmland and agricultural production which was valued at \$226 million in 2017, ranking fourth highest out of 62 counties in the State. In 2017, farms in the County averaged \$7,511 in agricultural sales per acre of farmland, approximately ten times the State average. Between 2012 and 2017, direct food sales at farm stands and farmers markets increased 209% to \$27.7 million. In 2015, the County updated its *Agricultural and Farmland Protection Plan*, which

aims to support public policy to protect, encourage and sustain agriculture in the County. The County also participates in the New York State Department of Agriculture and Markets' Agricultural District Program. This program is based on a combination of landowner incentives and protections designed to encourage the continued use of farmland for agricultural production and forestall the conversion of farmland to non-agricultural uses.

The fishing and shellfish industries are important sources of employment and income in the east end of the County. Commercial fishing is a heritage industry in the County that provides quality of life benefits, economic benefits and tourism revenue. According to the Atlantic Coastal Cooperative Statistics Program, from December 2019-2020, there were 479 commercial fishing establishments in the County landing more than 21 million pounds of fish, valued at nearly \$26 million. The County's shellfish industry (primarily bay scallops, oysters and hard clams) has been enhanced through the establishment and implementation of the Suffolk County Shellfish Aquaculture Lease Program in Peconic Bay and Gardiners Bay. As of May 2021, there are 56 shellfish aquaculture leases in place, which cover 800 acres of County-owned underwater lands.

CIVIC LANDSCAPE

Housing

According to the U. S. Census Bureau, as of 2019, there were 577,512 housing units situated in the County. Single family homes dominate the housing stock, comprising 81% of all units. The County has 489,301 households and 81% of the County's occupied housing is owner-occupied. This rate of owner-occupied housing is significantly higher than the 64% of owner-occupied housing in the nation as a whole. The County's owner-occupied housing percentage has remained at around 80% for more than 40 years.

Multi-family housing construction is robust in the County. According to the Suffolk County Department of Economic Development & Planning, in the five years since 2015, a total of 64 multi-family housing complexes containing a total of 4,500 units have been built in the County and another 4,400 units are currently under construction. About half of the new units are in rental apartment complexes, and half are in ownership complexes. In addition, 113 multi-family housing complexes are currently proposed for construction in the County, which could add more than 14,000 housing units. Since 2015, ten assisted living facilities opened in the County and two facilities are currently under construction. Another 19 assisted living facilities have been proposed for construction in the County.

The table below shows the number of new housing units authorized and the value of construction. In 2019, building permits for 772 housing units were issued in the County, down 23% from the 2018 figure, yet residential construction in 2019 was still valued at more than \$500 million in the County. Through August 2020, figures appear to be tracking to 2019, with 357 housing units authorized by building permit.

Number and Value of New Housing Units Authorized by Building Permit in the County

Year	Housing Units	Value of New Residential Construction (in millions)
2020 (through August)	357	N/A
2019	772	\$544.1
2018	1,002	585.4
2017	1,112	637.0
2016	1,067	648.3
2015	1,218	690.8
2014	1,217	750.6

Source: U. S. Census Bureau, Construction Statistics Division

The housing market in the County remains strong. County home prices in September 2020 were about 69.1% higher than the national median as reported by the National Association of Realtors for the first quarter of 2020. As reported by the New York State Association of Realtors, and indicated in the table below, in September 2020, the median selling price of a home in the County was \$464,375, an increase of 13.3% compared to the median price in September 2019.

Existing Home Sales in the County, September of Each Year

Year	Median Sales Price	Percentage Change From Previous Year	Number of Homes Sold
2020	\$464,375	13.3%	1,770
2019	410,000	7.2%	1,425
2018	382,500	6.3%	1,477
2017	360,000	3.2%	1,593
2016	349,000	5.1%	1,445
2015	332,000	0.6%	1,294

Source: New York State Association of Realtors

According to data provided by RealtyTrac, in October 2020, 0.02% of homes in the County were in some stage of foreclosure, slightly higher than the national percentage of 0.01%.

The County is home to one of the largest concentrations of seasonal homes of any county in the nation. According to the U. S. Census Bureau, in 2019 there were 52,000 seasonal homes in the County (primarily in the eastern part of the County and on Fire Island), which draw part-time residents to the area during the summer months and on weekends. Only nine counties nationwide have more seasonal homes. Seasonal second homes on Long Island generated significant economic activity in 2019, \$439 million, according to Tourism Economics. As of 2018, the County Department of Economic Development & Planning estimates that the resident population in eastern Suffolk increases by more than 213,000 people during peak summer times due to tourism, which more than doubles the year-round population.

Transportation

The County's highway network includes the Northern and Southern State Parkways, which are located in the western portion of the County, and the Long Island Expressway (I-495) which extends eastward from New York City to the eastern portion of the County. Other major highways include Sunrise Highway, which connects the County's western border to its eastern town of Southampton, and the Sunken Meadow/Sagtikos Parkway which connects the north and south shores in the western part of the County.

According to the U. S. Census Bureau, as of 2019, 82.5% of employed County residents drove alone to work. The major employment centers and residential areas in the County are widely dispersed, making it difficult to effectively provide mass transit service. The County operates a public bus system, Suffolk County Transit, with 43 bus routes and 14,000 daily riders, and the Town of Huntington operates its own 4 route bus system in the County. The Long Island Rail Road (LIRR) provides public transportation between the County and New York City through access via 41 LIRR stations and is used by both commuters and leisure travelers.

Managed by the Metropolitan Transportation Authority ("MTA"), the MTA plans to spend \$5.7 billion in the coming years on LIRR infrastructure including funds to modernize switch and signal systems and purchase 160 new train cars, subject to any possible change based on pandemic-related MTA fiscal

challenges. The LIRR is also evaluating proposals for studying the potential electrification of the LIRR Port Jefferson Branch.

The completion of the Long Island Rail Road Second Track in September 2018 expanded capacity and reduced delays on the Main Line of the Long Island Rail Road for thousands of riders. The expanded rail service will help facilitate transit-oriented development planned near the Republic, Wyandanch, and Ronkonkoma LIRR stations in the County. The full potential of this investment will be realized with the completion of the LIRR Expansion Project from Floral Park to Hicksville, and East Side Access into Grand Central Terminal. The combined impact of these investment will greatly expand service and capacity on the Long Island Rail Road into Manhattan and reduce commute times by up to 40 minutes, making Suffolk County more attractive and accessible for residents and businesses.

There are nine public airports located in the County. At Republic Airport in East Farmingdale, Sheltair Aviation is currently constructing a \$55 million, 210,000 square foot aircraft hangar and terminal. The vast majority of the County's air passenger traffic occurs at Islip MacArthur Airport in Ronkonkoma, because it is the County's only airport with regularly scheduled carrier service. In 2018, the airport had 811,535 passenger enplanements, a 21.5% increase since 2012. In addition to numerous scheduled flights provided by Southwest Airlines, the airport offers scheduled flights to and from Philadelphia by American Airlines. In 2017, Frontier Airlines began serving Islip MacArthur Airport and offers nonstop flights to eight cities. According to the New York State Department of Transportation, Islip MacArthur Airport is the 8th busiest airport in the State, based on passenger volume. Accordingly, ground has broken at Islip MacArthur for a new \$8.4 million intermodal ground transportation facility, improving traveler access to the airport, expected to be completed by fall 2021. Funded through grants from the NYS DOT and Empire State Development, it is an investment as will enhance the region's competitiveness.

The State is providing \$1,250,000 to support the planning and design of a Customs and Border Protection (CBP) facility at MacArthur Airport. Once constructed, it will allow flights from Europe and the Western Hemisphere to land at the airport without preflight immigration screening. This facility will allow up to 400 passengers to be processed per hour and will pave the way for significant economic growth resulting from an estimated 1,200 new jobs located at the airport from airlines and the federal government as well as additional regional tourism. The final location of the CBP facility will be determined by the review of the Terminal Narrative Report prepared by the Town, and may be outside of the existing footprint of the terminal building. The Terminal Narrative Report is expected to be complete in 2021.

Ferry service to Connecticut is available from two ferry terminals located in the County, one in Port Jefferson and one in Orient Point. High-speed ferry service is also available between Orient Point and New London, Connecticut. In addition, each summer thousands of visitors are transported by ferries to several Fire Island communities.

With the discussion of a proposed multi-trillion dollar federal infrastructure bill in recent months, local efforts have focused on securing federal funding to advance high speed rail in the New England and North Atlantic region. The proposed North Atlantic Rail plan would connect New York to Boston in 100 minutes with a 200+ mph high speed rail line via Long Island and Ronkonkoma. This estimated \$100 billion project would be transformational on climate change, environmental justice, job creation and regional mobility, and would more directly integrate Long Island into the regional geography and create the world's largest innovation economy.



Source: East Moriches, Photo by Jake Lorefice, Unsplash

County Initiatives: Transportation

- **Reimagine Transit.** Addresses obstacles of declining ridership, escalating operating costs, and lack of diverse transit options, Reimagine Transit is the follow up program to the County's 2018 Countywide Mobility Study. This initiative will redesign Suffolk County's fixed-route bus network and identify opportunities for the use of new mobility tools, like on-demand transit services. In process it will rethink the entire network of routes and ensure that the County is making the best use of its resources, and aligning its transit investments with community goals and priorities. Community engagement on proposed design alternatives is underway, with a new transit system map to be unveiled in 2022.
- **MacArthur Hub.** The County continues to work with regional partners on the planning of a direct plane-to-train connection between Long Island MacArthur Airport and Ronkonkoma Train Station, the busiest train station in Suffolk County. It will be integrated as part of the larger redevelopment of the south side of Ronkonkoma Train Station into a mixed-use destination hub. Currently a Terminal Narrative Study is underway, evaluating potential new terminal locations that would provide a modern terminal and possible future expansion.
- **Yaphank Station.** Suffolk County is actively working with Brookhaven National Laboratory, the LIRR, and other local stakeholders on the planned relocation of the Yaphank station. Moving the little used Yaphank Train Station one mile east onto the campus of Brookhaven National Laboratory (BNL) would fully integrate this global research center into the region's transportation network. This project will make it possible for visiting scientists and researchers to more easily move about the New York State and County, facilitating the development of a regional innovation economy.

- **Nichols Road Rapid Transit.** The Nicolls Road Bus Rapid Transit is a proposed north-south transit connection and hiking biking network between the major assets along the corridor, including SBU, SBUH, Suffolk County Community College (SCCC), the Ronkonkoma Hub, Long Island MacArthur Airport, Patchogue Village and all three lines of the LIRR. The project is currently in the Preliminary Engineering & Design phase. The County's Innovation Zone ("I-Zone") initiative began in 2015 with an aim to create a multi-modal corridor along Nicolls Road that will connect some of the County's key assets including: Downtown Patchogue, the Ronkonkoma HUB and Long Island Islip MacArthur Airport, Stony Brook University and Brookhaven National Lab.
- **Route 110 Rapid Transit.** Project development and 30% design on the Route 110 BRT is underway and scheduled to be completed by the end of 2021. The Route 110 Bus Rapid Transit system will connect all of the major assets along the corridor, the Village of Amityville, the Amityville LIRR Station the Future Republic LIRR Train Station and East Farmingdale TOD, Farmingdale State University, the Walt Whitman Shops, Huntington Station, downtown Huntington, and high-tech and other employers in the corridor between the Southern and Northern State Parkways. Plans currently call for 21 bus rapid stations between Amityville and Huntington, with exclusive shoulder-running bus lanes for the majority of the corridor.
- **Hike-Bike Master Plan.** As part of its effort to transform Suffolk into a bike-friendly community, the County completed a regional Hike-Bike Master Plan in March 2020. This plan proposed over 1,200 miles of bike and pedestrian facilities throughout the County that, upon completion, would put over 84% of Suffolk residents within ½-mile of a hike or bike facility. The County has selected top corridors from the plan to advance into Conceptual Design with an eye towards implementation over the next three years. In September 2019, Suffolk County launched a regional bike-share program with the support of Bethpage Federal Credit Union. This system features over two hundred bikes at forty stations located throughout Suffolk's downtowns, parks, and major destinations, and provides a new, healthy and enjoyable transportation alternative for residents and visitors.

Parks, Recreation & Conservation

The County is home to 26 State parks attracting more than 16 million attendees annually according to the New York State Department of Parks and Recreation. The State parks in the County that were most frequently visited in 2019 were Robert Moses State Park (with 4.3 million visitors), Sunken Meadow State Park (with 3.6 million visitors), Captree State Park (with 1.4 million visitors), Heckscher Park (with 1.1 million visitors) and Montauk State Park (with 1.1 million visitors).

The County has the largest County-owned parks system in the U.S. with 78 County parks and still hundreds more town and village parks and open space. More than 60,000 acres of trails, gardens, farmlands, woodlands, waterways, day camps, ball fields, and playgrounds provide County residents with recreation, relaxation and beauty. With 986 miles of shoreline, industries such as recreational boating, boat sales and service, marinas, and charter boat fishing are prominent in the County. Moreover, the beaches in the County are top ranked. Coopers Beach in Southampton has again been ranked fourth among the top ten beaches in the United States in 2019 by Florida International University.

There are 68 golf courses located in the County. In 2018, the U.S. Open Golf Championship was held at the Shinnecock Hills Golf Club in Southampton and will return again in 2026. In 2019, the PGA Championship was held at the Black Course at Bethpage State Park and the Ryder Cup is scheduled to be played there in 2024. These major sporting events bring tremendous economic benefit to the County and the Long Island region. The 2018 U.S. Open Golf Championship had an estimated regional

economic impact of \$120 million, with over 8,000 hotel rooms booked and 200,000 attendees throughout the course of the week-long event.

The County is home to numerous cultural and entertainment facilities. The County's 6,000-seat ballpark in Central Islip is home to the Long Island Ducks independent league baseball team. Hundreds of thousands of patrons attend games there every year. Other recreational attractions in the County include Atlantis Marine World aquarium in Riverhead, Splish Splash, a large water park also located in Riverhead and Adventureland, a traditional amusement park located in Farmingdale. The County boasts several performing arts theaters in its downtowns, including the Paramount Theater in Huntington, the Engeman Theater in Northport, and the Argyle Theatre in Babylon, the Boulton Center in Bay Shore, the Patchogue Theatre for the Performing Arts and the Suffolk Theater in downtown Riverhead.

According to the County Department of Economic Development & Planning, there are more than 5,300 lodging rooms located in eastern Suffolk, ranging from luxurious boutique hotels and bed & breakfast inns to traditional motels. These lodging properties draw thousands of tourists to the County's east end throughout the year, but primarily in the summer months. The department estimates that the resident population in eastern Suffolk increases by more than 213,000 people during peak summer times due to tourism, which more than doubles the year-round population. Due to its proximity to New York City, the County is well situated to serve the vacation needs of New York City residents.

County Initiatives: Environment

- **Awards.** The County has received awards for environmental stewardship practices. Awarded with the 2021 NYS DEC Environmental Excellence Award for the Septic Improvement Program for leaders in innovation and sustainability, the County was also recognized by NACO for leadership in Federal wastewater infrastructure requests.
- **System Upgrades.** To date, nearly 1,000 Innovative/Alternative Onsite Wastewater Treatment Systems (I/A OWTS) have been installed throughout the County. Phase II, the first 30 years of the SWP, targets 172,211 wastewater upgrades located in all near-shore areas with a 2-year groundwater travel time, Drinking Water Priority Rank 1 areas, and Surface Water Area Priority Rank 1 areas throughout Suffolk County. Assuming that an average grant per installation is \$15,000 with a target of approximately 60,000 wastewater upgrades in the first decade under Phase II, the request is for \$225M representing a 25% Federal cost share.
- **HABs Detection.** In Suffolk County, approximately 74 percent of homes are unsewered and discharge sanitary wastewater containing elevated nitrogen levels to the underlying groundwater that provides the sole source of potable supply for County residents and groundwater base flow to the County's surface waters. Nitrogen in coastal receiving waters has been linked to decreased water clarity due to excessive algal growth, hypoxic episodes, as a contributing factor to the presence of harmful algal blooms ("HABs"), and the loss of eelgrass along shorelines. HABs have also been identified as a primary contributor to the destruction of the once great shell fishing industry including a devastating reduction in the annual harvest of hard clams and scallops.
- **Subwatersheds Wastewater Plan.** The impacts to the coastal communities of Suffolk County from Superstorm Sandy in 2012 underscored the connection between excess nitrogen and associated loss of submerged aquatic and coastal vegetation that provides a critical role in reducing wave energy from coastal storms. Connecting to or installing sewers is not a practical or cost-effective

option for the entire county. Suffolk County's Subwatersheds Wastewater Plan is the product of years of intensive scientific research, documentation, modeling, and evaluation of all of Suffolk County's water resources and provides a parcel-specific roadmap on how to address the nitrogen crisis through wastewater upgrades and other nitrogen pollution mitigation strategies. The plan seeks to arrest and reverse the existing trend of degrading water quality over a 10-year period.



Source: Shinnecock Bay, Photo by Clay Leconey, Unsplash

- **Wastewater Management District.** In 2021, the County released the Countywide Wastewater Management District Feasibility Study. The Wastewater Management District would facilitate the expansion of advanced wastewater infrastructure to replace 380,000 failing cesspools and septic systems, as recommended in the County's Subwatersheds Wastewater Plan. The Countywide Wastewater Management District will, in a phased approach: Create the administrative structure required to implement the County's new long term water quality plan (Subwatersheds Wastewater Plan). Provide new benefits for homeowners through expanded financial assistance, better program management, and periodic inspection of septic systems. Serve as vehicle for new investments in water quality infrastructure to make system upgrades and sewer connections affordable for homeowners. Spur local job growth to help fuel the post-COVID economic recovery through establishment of a stable and recurring revenue stream to fund advanced wastewater treatment. Provide prescriptive advantages of a district for on-site installations comparable to those extended to sewer connections. Provide for greater equity in sewer charges by equalizing rates among individual sewer districts.
- **Open Space Acquisition and Farmland Preservation.** The County has an ongoing open space acquisition and farmland preservation program, whereby a portion of the County's sales tax is devoted to the acquisition of open space lands within the County. The County also has an ongoing Purchase of Development Rights program to preserve and protect working farmland. As of May 2021, the County has purchased the development rights to 11,165 acres of farmland under the program.

- **Coastal Resiliency.** The County continues to work to advance its Coastal Resiliency Initiative, which will utilize \$390 million in federal and state financial aid to connect nearly 6,500 parcels along river corridors on the County's south shore to sewers as part of the State's Post-Sandy Coastal Resiliency initiatives. The projects represent the largest investment in sewer infrastructure in the County in more than 40 years and will eliminate nearly 6,500 cesspools and septic systems in these areas, a primary source of nitrogen pollution that has degraded water quality in local bays. Construction had been expected to begin in early 2021, but the COVID-19 pandemic has delayed the project timetable and increased project cost estimates. In April 2021, the County announced it had secured \$70 million necessary to cover the increased project costs. \$46 million will come from the County's allocation under the American Rescue Plan ("ARP") and \$24 million from the County sewer reserve fund. The County is working to address those issues and anticipates letting of construction contracts in early 2021.
- **Reclaim Our Water.** The County's Reclaim Our Water initiative continues to advance the use of Innovative and Alternative Onsite Wastewater Treatment Systems as an alternative to cesspools and septic systems in areas where sewerage is not a practical or cost-effective alternative. Along with the Center for Clean Water Technology at Stony Brook University, the County has piloted three versions of an experimental non-proprietary Nitrogen Reducing Biofilter on County-owned Park properties. In 2017, the County Legislature approved the Septic Improvement Program, which provides grants and loans to homeowners to make voluntary replacement of cesspools and septic systems with provisionally approved nitrogen reducing technologies more affordable for homeowners. As of May 1, 2021, 2,337 property owners have applied and 782 advanced nitrogen reducing systems have been installed as part of the Septic Improvement Program. Another 250 installations are currently pending. In addition, more than 700 state-of-the-art nitrogen reducing septic systems have been installed outside of the grant program throughout the County. In early 2018, the State awarded the County \$10 million in Septic System Replacement Funds toward this grant program. As of May 1, 2021, over \$7.8 million in County funds and almost \$7 million in State funds have been expended as part of the program. Due to the overwhelming success of the County grant program, the State awarded the County an additional \$10 million in SSRP funds in 2021. In 2017, the County Legislature approved changes to the Suffolk County Sanitary Code to ban the in-kind replacement of cesspools effective July 1, 2019. In 2020, the County Legislature approved changes to the Suffolk County Sanitary Code to require the installation of advanced septic systems for new residential construction effective July 1, 2021 and to permit wastewater treatment systems to double the sanitary flow up to 30,000 gallons per day, allowing for greater flexibility of small wastewater plants in downtown areas.
- **The Suffolk County 1/4% Sales Tax Drinking Water Protection Program for Environmental Protection** was created by Resolution 659-2002; amended by Resolution 770-2007 and by voter approval this program has been extended 17 years (until 2030). The program provides funding for the Water Quality Protection and Restoration Program ("WQPRP") and Land Stewardship Initiatives. Through the WQPRP, the County has funded more than \$45 million in projects to reduce stormwater runoff, mitigate and prevent pollution of groundwater and surface waters, and to restore natural water habitats and wetlands. The WQPRP currently supervises more than 71 on-going water quality improvement projects including the East End's Peconic Estuary Project, the Living Shorelines, the Wetlands Restorations and the Habitat Restorations. Also included in the program, construction began in 2018 on the Mud Creek Watershed Aquatic Ecosystem Restoration - a 45.8 acre freshwater wet land restoration site in the County, which is estimated to be completed in May 2022.
- **County Landbank.** In close coordination with the County Comptroller's Office and Department of Health Services, the County Landbank has facilitated the sale, remediation and redevelopment of

15 tax delinquent brownfields, generating over \$2.5 million dollars in sales revenue and over \$350,000 in annual taxes. Additionally, since the creation of the Landbank in 2013, over \$7 million in back taxes have been collected from 96 formerly tax delinquent property owners. To further this goal, the Landbank has conducted 70 Limited Phase I Environmental Site Assessments and 40 Phase II Environmental Site Assessments in an effort to provide prospective purchasers with information regarding environmental contamination and associated remediation costs.



Source: East Hampton, Photo by Clay Leconey, Unsplash

County Initiatives: Housing & Economic Development

- In the Town of Southampton, the 2015 *Riverside Revitalization Action Plan* calls for the re-zoning of 468 acres in Riverside that could result in 2,267 new housing units, 133,517 square feet of retail space and 62,000 square feet of professional offices. New wastewater treatment infrastructure would be needed to facilitate this development. The County-funded reconstruction of the Riverside traffic circle was completed in 2018. At the traffic circle, a blighted, long vacant diner was bulldozed in 2018 and a mixed workforce housing and office building opened in 2019 at the site. In the Town of Southampton, two rental workforce housing developments totaling 66 units were completed in 2019: Speonk Commons and Sandy Hollow Cove. On the formerly blighted site of the Canoe Place Inn in Hampton Bays, a \$60 million, 25 room hotel, restaurant, and 37-unit townhouse development began construction in 2018. Completion is expected in the summer of 2021. In 2018, the Village of Westhampton Beach was awarded a \$5 million grant from the State Department of Environmental Conservation toward the construction of a new sewer district project to allow for new apartments and expanded dining options in the downtown village. Construction on the new sewer project began in April 2021.

- In other locations in the County, a number of additional significant development and redevelopment projects have recently been constructed or are proposed. The proposals include Islip Pines in Holbrook, a 136 acre, \$300 million development including apartments, retail space, office space, a movie theater and a hotel that was approved for construction. In Greenport, a 50 unit affordable apartment complex, Vineyard View, completed construction in 2020, having received \$5.7 million in financing from the State in partnership with the Community Development Corporation of Long Island. In Lindenhurst, construction of Tritec's "The Wel," a 260-unit residential development immediately across from the Lindenhurst Train Station and a block away from Lindenhurst's downtown, is nearing completion estimated August 2021 with some rentals available. In addition, several new restaurants, bars and cafes have opened in Lindenhurst in recent years. A recent code change in Smithtown will now permit residential construction on some parcels in the Long Island Innovation Park at Hauppauge, representing a major opportunity for the future of what is one of the largest industrial parks in the northeast and employs more than 55,000 people across Long Island.
- As part of project Jumpstart, in 2019 Suffolk County awarded \$3.075 million in economic development funds to local municipal partners for transformative transit-oriented and downtown redevelopment projects. Among these awards were \$100,000 to the Village of Babylon for restoration of the historic Argyle Falls Park in downtown Babylon. \$350,000 to the Village of Lindenhurst for implementation of the Village's Downtown Walkability Improvement Plan. \$400,000 to the Town of Riverhead to support pedestrian and bicycle infrastructure as part of its Town Square downtown revitalization project. Through its Jumpstart program, the County has supported the Ronkonkoma Hub project with \$3.8M in funding to the Town of Brookhaven for critical infrastructure related to the project. The Suffolk County Legislature also approved \$25M in Sewer District Serial Bonds to be used for improvements to the Southwest Sewer District for the Ronkonkoma Hub, which includes construction of a sanitary pumping station and a seven-mile-long force main and gravity line piping system to convey wastewater from the Hub to the Sewer District, and ultimately to the existing Bergen Point Sewage Treatment Plant.
- Since 2017, Suffolk County has awarded over \$1.5 million in funding through the Downtown Revitalization Grant Program to help communities enhance their downtowns and generate economic activity. Awards included funding for streetscape enhancements, pedestrian improvements in business districts, improved municipal parking, comfort stations in public facilities, and restoration of historic downtown structures. These investments have leveraged an additional \$1.3 million in local funding and facilitated increased resident and visitor experiences in our downtown corridors.
- Suffolk County Executive Steve Bellone announced \$10 million in funding to develop new **inclusive housing** opportunities for individuals with intellectual and developmental disabilities. The funding, which will be included as part of the County Executive's proposed capital budget, will provide \$2.5 million in funding a year for four years. According to the New York Housing Resource Center, there are more than 25,000 adults in Suffolk County with intellectual or developmental disabilities and 63% of them live with family caregivers and of those, 25% of the caregivers over the age of 60. The program seeks to address the predicament for many families who are concerned with what happens to their child once they are deceased. This announcement builds upon the Sewer Infrastructure Pilot program, providing \$2 million in wastewater infrastructure funding for projects designed to meet the regional need to develop new housing opportunities for people with intellectual and developmental disabilities. To date, the program has funded the creation of 18 units of inclusive housing with \$900k of the initial \$2 million appropriated, with 10 units filled in Riverhead.

- Through the County's Housing Opportunities Program, the County has committed more than \$30 million since 2012 to assist in the construction of 2,091 housing units, 1,603 of which are affordable to families earning at or below 120% of the area median income, and more than half of these affordable units are reserved for families earning at or below 60% of the area median income.
- The County Landbank has invested over \$3.5 million in local communities through its Acquire and Renovate Bank Owned Residences program for zombie properties and generated \$4.1 million in sales revenue to be reinvested into the program. To date, 18 affordable homes have been sold to income qualified first time homebuyers, 2 homes have been donated to the Town of Brookhaven for wetlands restoration and 5 properties have been donated to Habitat for Humanity for the construction of new homes built by the community and future homeowners. In addition to the homes sold and donated, 4 homes are currently under construction and/or pending sale.

QUALITY OF LIVING

Educational Facilities

According to the NYS Department of Education, there are 69 public school districts located in the County and the combined spending budget of these public school districts amounted to \$6.7 billion for the 2018-2019 school year. According to Western Suffolk BOCES, in the 2018-2019 school year, public school enrollment in school districts in the County was 229,988, a 5.8% decrease in the five years since 2013-2014. Birth rates have slowly decreased in the County in the past two decades, which has led to slowly declining school enrollments. Public school enrollment is expected to continue to slowly decrease by 1.3% per year during the next three years.

There are four four-year colleges and one law school, Touro Law Center, located in the County. Farmingdale State College continues to expand, with a new \$19 million School of Business building that opened in 2015. Suffolk County Community College has an enrollment of 26,000 students on three campuses and continues to expand its facilities. Numerous other professional and technical schools are also located in the County.

Stony Brook University is the largest university located in the County with a Fall 2019 enrollment of 17,100 undergraduate and 8,400 graduate students. The University continues to expand its facilities. The University's new \$41 million, 70,000 square foot computer science building opened in 2015. A new \$63 million student services building currently under construction is expected to open by 2021 and two new residence halls with a total of 759 dorm rooms were completed in 2017. The University's Research and Development Park continues to expand with two additional buildings: the University's \$60 million Innovation and Discovery Center, base building completed in 2020 and construction of additional research and chemistry labs commenced spring 2021. The \$75 million Institute for Discovery and Innovation in Medicine & Engineering is expected to open in December 2021. Stony Brook University also operates two New York State Centers for Advanced Technology: one in Medical Biotechnology and another in Sensor Technologies. The University's Stony Brook Research and Development Park includes its Advanced Energy Research and Technology Center, the Center for Excellence in Wireless Information Technology and the Innovation and Discovery Center at the Research and Development Park, and the Institute for Discovery and Innovation in Medicine & Engineering expected to open in December 2021.

