

Demographic, Economic And Development Trends

November 2008



SUFFOLK COUNTY DEPARTMENT OF PLANNING

Suffolk County ■ New York

DEMOGRAPHIC, ECONOMIC, AND DEVELOPMENT TRENDS

Suffolk County, New York

November 2008

Suffolk County Department of Planning

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Suffolk County Department of Planning
Hauppauge, New York
November 2008

EXECUTIVE SUMMARY

Demographic Trends

- Suffolk County's population in 2007 was 1,504,947. This is an increase of 6% since 2000. Suffolk County is the 23rd most populated county among 3,141 U.S. counties.
- Suffolk County's population is projected to increase by 18% by the year 2035.
- There are 185,000 senior citizens age 65 and over in Suffolk County, representing 13% of the population. This group increased by 11% between 2000 and 2007. The population age 20-24 increased by 23% between 2000 and 2007 and the population age 0-4 decreased by 8% in that period.
- Suffolk County continues to become more racially diverse. Whites make up 75% of the Suffolk County population. Hispanics represent 13%, Blacks are 8%, and Asians are 3% of the population.
- Suffolk County's 2006 median household income was \$76,847, ranking in the top 1% of all counties.
- In 2007 there were 71,000 people living in poverty in Suffolk County, 5% of the population.
- As of 2007, 82% of Suffolk County's occupied housing units were owner-occupied.
- In the past year, Suffolk County housing prices have declined by about 10%, but are still 90% higher than the national median.
- The average rent for a one-bedroom apartment in Suffolk County was \$1,107 in 2008, an increase of only 9% since 2002.

Economic Trends

- The number of new homes constructed in Suffolk County is expected to be lower in 2008 than in any year since 1950.
- The gross metropolitan product of Long Island is \$137 billion, roughly the same size as the economy of Kuwait.
- Employment growth in the Nassau-Suffolk region is flat.
- Suffolk County's unemployment rate of 5.0% was significantly higher than a year earlier but is more favorable than the unemployment rate for New York State and for the U.S. as a whole.
- Suffolk County had more than 47,000 businesses with payroll in 2006, an all-time high in the County.
- There are 37,000 second homes in eastern Suffolk County. The population of eastern Suffolk increases by more than 200,000 in the summer because of these summer homes and 5,800 hotel and motel rooms.
- With 34,000 acres of farmland, the value of agricultural production in Suffolk County is the highest of any county in New York State.

Development Trends

- The Suffolk County office market is stable, with a 15.8% vacancy rate in more than 24 million square feet of buildings.
- The industrial market in Suffolk County is very strong. Its 4.4% vacancy rate is among the lowest in the nation, in 91 million square feet of industrial buildings.
- There are 12,200 hotel and motel rooms in Suffolk County, with more than 1,500 rooms added since 2003. Occupancy rates have remained steady at 74% since 2006.
- Suffolk County has 39 million square foot of space in planned shopping centers, and 8 million square feet of space in its downtowns, many of which continue to emerge as strong dining and entertainment centers.
- More than 5 million square feet of retail space has been added in Suffolk County since 2000.
- Current and future engines of growth in Suffolk County are located in the Pilgrim State Hospital area in Brentwood, Central Islip, Route 58 in Riverhead, Calverton Airport in Riverhead, and Yaphank.
- As of 2007 there were 1.2 million registered vehicles in Suffolk County, 2.44 vehicles for every household.

Demographic, Economic, and Development Trends

Suffolk County, New York

Prepared by the Suffolk County Planning Department
Updated November 2008

The first European settlers arrived in Suffolk County in 1640 and the County was established in 1683 as one of the ten original counties in New York State. Suffolk is a suburban county located on Long Island east of New York City and is bordered on the west by Nassau County. Suffolk County's land area totals 911 square miles, and the County is 86 miles long and 15 miles wide. With shores on both the Atlantic Ocean and the Long Island Sound, Suffolk County's shoreline totals 986 miles.

QUALITY OF LIFE

Sperling's Best Places rates metropolitan areas on various quality of life categories. In 2005, Nassau-Suffolk was ranked the 19th best place to live, of 331 metro areas in the nation. In 2007, Nassau-Suffolk was ranked by *Sperling* as the 33rd most secure (in health, prosperity, safety and security) metropolitan area out of 379 areas nationwide. In addition, Nassau-Suffolk was ranked by *Sperling* as the third least stressful place to live in 2004.

However, a 2006 *Sperling* study of best places for seniors to live indicated that Nassau-Suffolk ranked 48th out of the 50 largest metropolitan areas. Also, *Sperling* reported that Suffolk County's 2007 cost of living was 38% higher than the national average, with housing costs 60% higher than the national average.

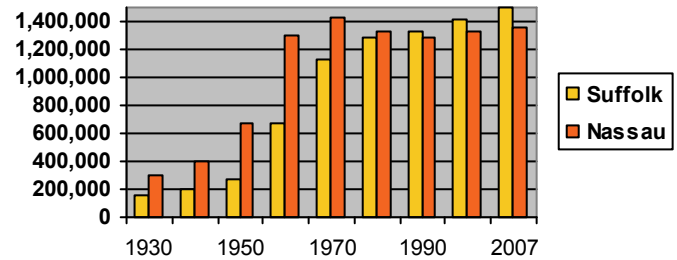
Nassau-Suffolk has the second-lowest overall crime rate in the nation, thanks to extremely low violent and property crime rates. A 2007 study by *Forbes* magazine ranked Long Island 6th best in culture & leisure (out of the 200 largest metropolitan regions), 18th best in colleges, and 32nd in educational attainment. However, the region ranked 194th of 200 in cost of living, 170th in cost of doing business, and 141st in job growth.

POPULATION

Total Population

In 1790, the first U. S. Census showed that Suffolk County had more people than Brooklyn, Queens, the Bronx and Staten Island combined. By 1915, Nassau County surpassed Suffolk County in population. After World War II, Suffolk County developed rapidly, especially in the 20 years between 1950 and 1970. During that time, Suffolk's population quadrupled, increasing by 851,000. In 1986 Suffolk County passed Nassau County in population and remains higher than Nassau in population.

Population



Today, the population of Suffolk County continues to grow slowly. The Long Island Power Authority (LIPA) estimated that Suffolk County's population in 2007 was 1,504,947. This figure represents an increase of 6.0% since 2000, after increases of 7% in the 1990s and 3% in the 1980s. Suffolk County's population is the largest of any county in New York State outside of New York City. Only Brooklyn, Queens and Manhattan have more people. According to the U.S. Census Bureau, Suffolk County ranks 23rd in population out of all 3,141 counties in the United States, and is larger in population than 12 U. S. states. Its slow population growth is expected to continue.

Population Density

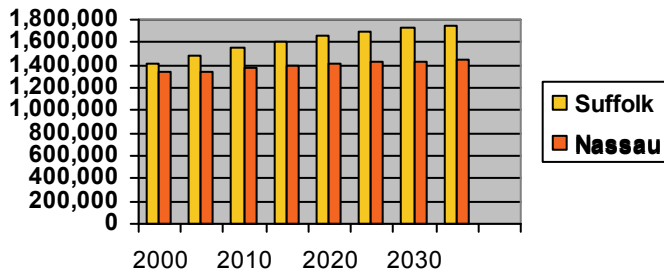
Based on 2007 population estimates prepared by the Long Island Power Authority (LIPA), Suffolk County's population density was 1,652 persons per square mile. Yet Suffolk's ten towns vary greatly in population size and density. The five western towns, Huntington, Babylon, Smithtown, Islip, and Brookhaven, contain 91% of the County's population but just 62% of its land area. The 2007 population density in western Suffolk was 2,417 persons per square mile, while in eastern Suffolk the density was just 405 persons per square mile. Of the ten towns that comprise Suffolk County, the largest in population is Brookhaven at 489,000 and the smallest is Shelter Island with 2,500 residents in 2007.

Although Suffolk has more people than Nassau County, Suffolk is only about one-third as densely populated as Nassau. Population density in Suffolk County (1,652 persons per square mile) is lower than the density in Nassau County (4,725 persons per square mile), Westchester County (2,198), Rockland County (1,702), Queens County (20,783), and Manhattan (70,595).

Population Projections

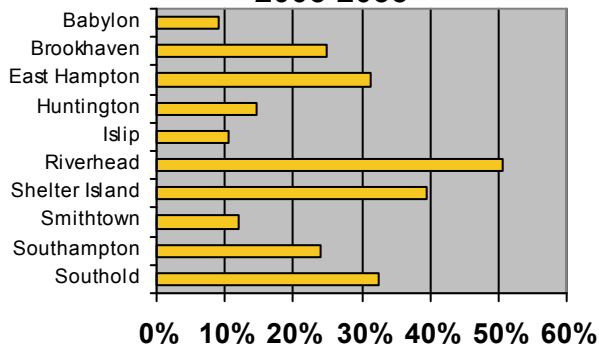
Suffolk County's population is projected to continue to increase slowly for the next 25 years. Between 2005 and 2035, Suffolk County's population is projected to increase by 18%. Of Suffolk's ten towns, the Town of Riverhead is expected to increase by the largest percentage between 2005 and 2035, followed in order by the Towns of Shelter Island, Southold, East Hampton, Brookhaven, and Southampton. The largest numerical increase is expected in the Town of Brookhaven (118,000).

Projected Population



Saturation population is the population which can be expected if all available land were to be developed according to existing zoning. It is estimated that Suffolk County’s saturation population will be 1.8 million persons, and this population figure may be approached at around the year 2040. The saturation population figure represents about a 20% increase over the 2005 population figure for the County.

Projected Population Increase 2005-2035



Suffolk County’s projected saturation population has declined significantly in recent decades. In 1962, the saturation population was projected to be 3.4 million people in Suffolk County. Due to zoning changes, land preservation efforts and lower average household sizes, a much lower saturation population is now expected.

AGE OF THE POPULATION

The median age of the County’s population in 2006 was 38.3 years (up from 36.5 years in 2000). Suffolk County’s population continues to age along with the rest of the country, and has a slightly higher median age compared to the State’s median of 37.4 and the national median of 36.4, but lower than Nassau County’s median age of 40.7. The median age of Suffolk residents was just 33.5 in 1990, 29.9 in 1980 and 26.4 in 1970.

Pre-School and School-Age Population

Because of changing birth rates, the pre-school (age 0-4)

population in Suffolk County continues to change. This population declined by 22% in the 1970s as birth rates declined, and then climbed by 6% in the 1980s and by 8% in the 1990s as birth rates increased from the “baby boom echo.” Since 2000, however, birth rates have declined slightly. The population aged 0-4 in Suffolk County decreased by 8,260 or 8% between 2000 and 2007.

The school-age population in Suffolk County is now declining slowly. The number of children aged 5-17 decreased by 1% or 3,100 between 2000 and 2007. Suffolk County’s public school enrollment declined more than one-third from a peak of 331,000 in 1976 to 214,000 in 1990. These declines led to the closing of over 70 schools in Suffolk County. As the population age 5-17 increased by 36,000 or 15% in the 1990s, public school enrollment in Suffolk County increased every year between 1991 and 2004, but has decreased each year since 2004 and is projected to continue to slowly decrease. Public school enrollment as of 2007 was 254,000 in Suffolk County, far below the 300,000+ levels of the 1970s.

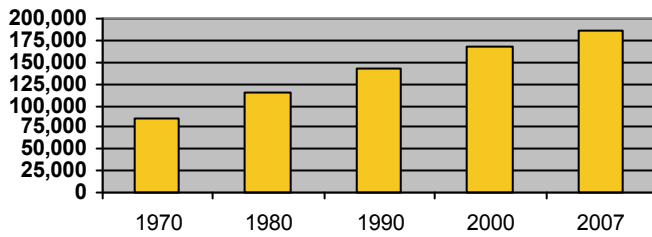
Young Adult Population

The population aged 20-34 is an important group to analyze because this population represents our young workers. The population in this age group in Suffolk County was 249,000 in 2007, a decrease of 7% from the 2000 figure, which was 19% lower than the 1990 figure. It is expected that the population in this age group will begin to increase as the “baby boom echo” population enters this age group. This change has already begun to happen; the population age 20-24 increased by 23% between 2000 and 2007. Many of these age group population shifts are influenced by social factors at the time when these people were born. In this case, many of the people in the age 20-34 group in 1990 were baby boomers who aged out of this group by 2000, replaced in 2000 by baby “busters” who are smaller in number.

Senior Citizen Population

Persons aged 65 and over are a fast-growing segment of Suffolk County’s population. In 2007, there were 185,000 persons aged 65 and over in Suffolk, comprising 13% of the population. In 1990, seniors aged 65 and over represented 11% of the population, up from 9% in 1980 and 8% in 1970. Between 2000 and 2007, the number aged 65 and over increased by 11% after increasing by 18% in the 1990s, by 22% in the 1980s and by 35% in the 1970s.

Population Age 65 and Over, Suffolk County



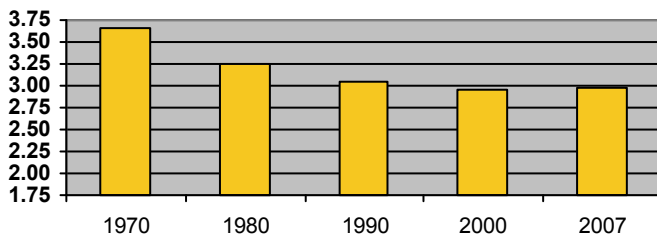
The 2000 census revealed that 35,000 or 22% of the County’s senior citizens live alone, and that 25% of Suffolk County households contain a senior citizen. These figures are even more striking in the five eastern Suffolk towns: 18% of the population is aged 65 or over and 33% of all households contain a senior citizen.

There are 165 multi-family housing complexes dedicated for seniors in Suffolk County. Suffolk contains approximately 25,000 units of senior-dedicated housing units in condos, apartments, and co-ops. There are fewer such units (10,000) in Nassau County.

HOUSEHOLD SIZE

The average household size in Suffolk County has decreased significantly in recent decades. As of 2007, the average household size was 2.97 persons per household. The average household size in Suffolk peaked at 3.74 in 1967. Household sizes declined significantly in the 1970s and averaged 3.04 by 1990. In 2000 the average Suffolk County household size was 2.96 people, and began to very slowly increase earlier this decade. A stable or very slowly increasing household size is expected in the coming years.

Household Size, Suffolk County



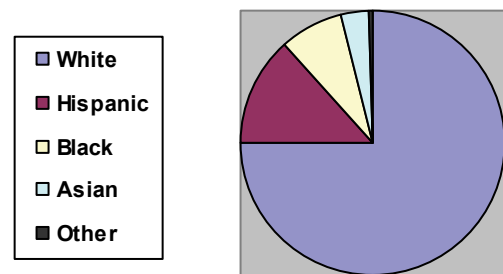
New housing developments tend to contain younger families and larger household sizes. As an area’s residents and housing mature, household sizes tend to decline, causing the total population to decline. This is especially true as development approaches saturation conditions and little new housing is built. Eventually, larger numbers of young households replace the older households and the household size stops declining or increases slightly, which is happening now.

RACE AND ETHNICITY

Suffolk County’s population is mostly White and in 2007, non-Hispanic Whites made up 75% of the population. Hispanics are now the largest minority group in Suffolk and numbered 193,000 or 13% of the population in 2007. Blacks numbered 114,000 or 8% of the total and there were 49,000 Asians comprising 3% of the population. An additional 1% of the population was of two or more races.

Suffolk County continues to become more racially diverse. Between 1990 and 2000, the non-Hispanic White population declined by 1%, while the Black population rose 19%, the Hispanic population increased by 70%, and the Asian population grew by 52%. Between 2000 and 2007, the Hispanic population increased by the largest raw number, but the fastest growing group in percentage terms was Asian, whose population increased by 34% between 2000 and 2007 in Suffolk County. These trends are expected to continue.

Suffolk County Population by Race and Hispanic Origin, 2007



As of the 2000 U. S. census, three ancestry groups dominate Long Island’s population. Suffolk County has more persons of Italian ancestry than any county in the United States. Italians make up 29% of the County’s population, Irish persons comprise 23% and Germans make up 17% of the population. There are more people of Irish and German descent on Long Island than in all of New York City.

Of Suffolk County’s Hispanic population, one-third were Puerto Rican, based on 2000 census data. The next largest Hispanic groups were Salvadoran, followed by Dominican, Colombian, Mexican, and Ecuadorian. Half of Suffolk County residents who spoke Spanish also speak English very well, based on 2000 census data.

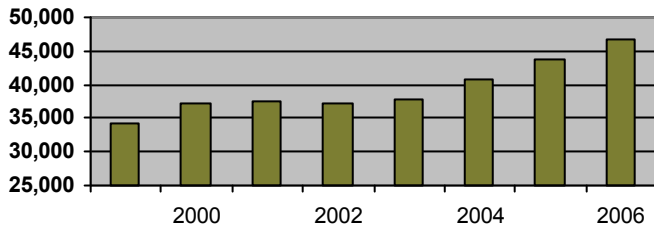
INCOME

Personal and Per Capita Income

Total personal income of Suffolk residents was \$68.2 billion in 2006, ranking 5th of all counties in New York State. The County’s 2006 per capita personal income was \$46,830, ranking 6th in New York State. Suffolk’s per capita income was 28% higher than the national average of \$36,714. Of the 3,141 counties in the United States, Suffolk’s per capita income ranked

83rd highest in 2006, in the top 3% of all counties.

Per Capita Income, Suffolk County



82% of the housing units in Suffolk County are owner-occupied.

Household Income

Suffolk County’s 2006 median household income was \$76,847, ranking in the top 1% of all counties. Suffolk’s median household income figure was 59% higher than the median household income in the nation as a whole. Suffolk’s average wage per job in 2006 of \$45,783 ranked in the top 4% of all counties in the country.

Poverty

Suffolk County’s poverty rate (the percentage of people living under the poverty level) remains low. However, in 2007 there were still 71,000 people in Suffolk County living in poverty, 5% of the population, according to the U. S. Census Bureau. This figure is based on a poverty income threshold which was \$20,650 for a family of four in 2007 and \$10,210 for an individual. This means that a one-person household earning \$11,000 in Suffolk County is considered to be living above the poverty level. In a relatively high cost area such as Suffolk County, poverty can be easily understated because the thresholds are based on a national standard.

In Suffolk County, the poverty rate for children was higher than for all persons. In 2007, more than 20,000 or 5.9% of persons under age 18 in Suffolk County lived in poverty as defined by the Census Bureau.

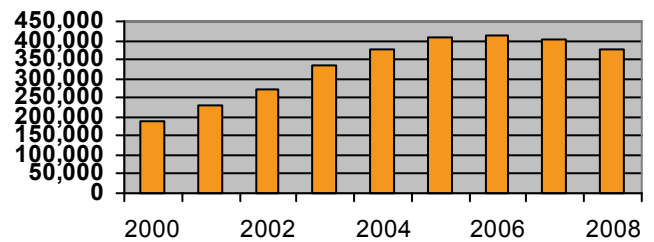
HOUSING

Suffolk County contains more than 500,000 housing units and nearly 500,000 households. Long Island has a very high percentage of owner-occupied housing units. As of 2007, 82% of Suffolk County’s occupied housing units were occupied by their owners, far above the nationwide figure of 67%. Long Island also has one of the lowest housing vacancy rates in the country. The homeowner vacancy rate in Suffolk was 1.2% in 2007, indicating a healthy market, but the vacancy rate in rented housing units was higher, at 6.0%.

Housing Prices

After several years of dramatic price increases, Suffolk County housing prices began to decrease in 2007. Home prices in Suffolk County increased by about 10-20% each year between 2000 and 2005. In 2006, the market began to soften and home prices rose by about 3%. Home prices were flat overall through most of 2007.

Median Home Selling Price, Suffolk County



As of September 2008, the median selling price of a home in Suffolk County was \$376,000, a 7% decline from September 2007. The overall decline has been about 10% from the peak prices of 2006. Home prices will likely continue to be reduced modestly for the next several months as the new reality of credit availability and more realistic housing prices become the norm. Suffolk County’s home values are expected to remain high relative to national figures. Suffolk County home prices in 2008 remain about 90% higher than the national median.

Housing Sales and Construction

Housing sales have slowed considerably in Suffolk County. In 2007, there were 9,638 homes sold in Suffolk County, a level last seen in the mid-1990s after the last housing slump. In comparison, in 2005, 13,201 homes were sold in Suffolk County, a record high number. The number of homes sold in Suffolk County in 2008 is running 19% below the number sold in the same period in 2007.

The number of building permits issued for new housing in

Suffolk County has also declined significantly. In 2007, there were 2,126 new housing units authorized by building permit in Suffolk County, the fewest number in any year since records began in 1950. The 2007 figure was 17% lower than the 2006 figure and 52% lower than in 2002. Through September 2008, the number of new housing unit permits is down another 19% from this point in 2007. Not only is the housing market slumping, but the amount of vacant land available for future development is becoming more limited.



In 2007 more than 2,000 new homes were built in Suffolk County.

The value of new residential construction in Suffolk hit an all-time high of \$1.15 billion in 2005, but declined by 37% in 2006 and by another 12% in 2007 to \$640 million, similar to the level in 1998 before the housing market started heating up. The value of construction of new homes between January and September 2008 is 14% lower than it was in the same period in 2007.

Rental Housing

Housing rents have remained fairly steady in recent years. A Suffolk County Planning Department analysis of apartments for rent in *Newsday* showed that in early 2008 in Suffolk County the average rent for a one-bedroom apartment was \$1,107, a slight increase of 9% over the 2002 figure (as home sale prices increased 59% in that period) but 42% higher than the 1999 figure. An average two bedroom apartment rented for \$1,469 in 2008, up 11% since 2002. In a 2000 U.S. census ranking of median gross rent paid, Suffolk County ranked 11th highest among all counties in the nation.

After relatively little rental apartment construction in the 1980s, construction of apartment complexes for seniors and non-seniors has increased substantially in recent years. In the 1980s, nearly 1,700 units of market rate senior apartments were constructed in Suffolk County, and 2,800 units were constructed in the 1990s. Already since 2000, more than 3,800 senior citizen apartment units have been built. Non-senior apartment construction has increased just as dramatically. In the 1980s in Suffolk, 885 market rate apartment units were built, followed by 2,500 units in the 1990s and 3,200 units already since 2000. Many of these new complexes charge rents in excess of \$1,500 for a one-bedroom apartment.



A rental apartment complex in Suffolk County.

ECONOMY

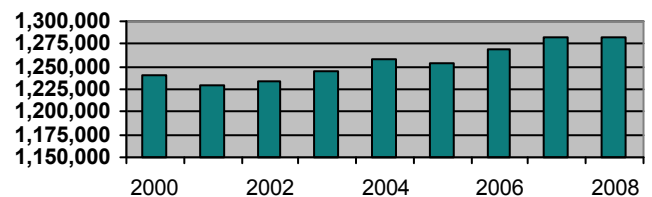
Long Island has a large and diverse economy. Its gross metropolitan product, the total output of goods and services produced, was estimated to be \$137 billion in 2007. This figure would place Nassau-Suffolk in the top 20 metropolitan areas in the U.S., and is approximately the same size as the economies of Algeria, Kuwait, and Ukraine.

Employment

Suffolk County continues to experience stable economic conditions. In October 2008, Suffolk County had 756,400 employed residents. This is a decrease of 1,200 (0.2%) from October 2007, which was the highest figure for any October. The County’s labor force growth has remained flat for the past several months.

Employment growth in the Nassau-Suffolk region has turned slightly negative in an unfavorable national economic climate. Total non-farm employment in October 2008 was 1.283 million, an increase of just 300 jobs since October 2007. Non-government employment declined by 2,800 in the period.

Employment in the Nassau-Suffolk Region



There was employment growth in a few categories. The largest employment growth in the past year occurred in educational and health services (an increase of 3,600 jobs, or 1.7%) and government (an increase of 3,100 or 1.5%, primarily in local school districts). The largest job losses occurred in manufacturing (-2,200 or -2.6%) and financial activities (-1,900 or -2.4%).

Between 1993 and 2000, 168,900 jobs were added on Long Island. In 2001 and 2002, employment growth turned slightly negative. Modest job growth took place in 2003 through 2007 when a total of 48,000 jobs were added in Nassau-Suffolk.

After significant manufacturing job losses in the late 1980s and early 1990s, employment in Nassau-Suffolk's manufacturing sector stabilized somewhat in the late 1990s, and then began to decline moderately in 2001. Employment in durable goods manufacturing declined 21% between 1998 and 2003 from 67,200 to 53,100 jobs, and the figure was another 7% lower (49,100) by October 2008.

Since 2003, employment in defense-related industries has increased on Long Island due to higher military spending. Defense contract awards to Suffolk firms in 2006 totaled \$570 million, up 44% over the 2001 figure but still lower than the 1990 figure.



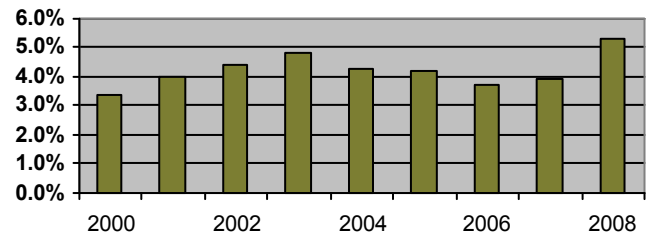
Symbol Technologies is a large local employer.

The employment base on Long Island has become more diversified in the past ten years. The loss of defense jobs in the 1980s and 1990s hurt the Long Island economy but allowed the economy to become less dependent on one industry. Long Island can now depend on several growth sectors, including health, educational and social services, tourism, the arts, and several emerging technologies, notably bioscience technology. Long Island's bioscience research community is expected to continue to expand, and the major players are Cold Spring Harbor Laboratory, SUNY Stony Brook, Brookhaven National Lab, and the North Shore Health System.

Unemployment and Inflation

The unemployment rate in the County was 5.0% in October 2008, remaining lower than the rate in New York State as a whole and the United States, but significantly higher than it was a year earlier (3.6%). Suffolk County's unemployment rate has been rising since mid-2007. In October 2008 there were 40,100 unemployed Suffolk residents, 12,000 more than the number unemployed in October 2007 and the highest number of unemployed residents in September since 1993. Suffolk's 5.0% unemployment rate in September 2008 was higher than any September unemployment rate since 1995. Yet Suffolk County's unemployment rate remains lower than the rate in New York State (5.5%) and the United States (6.5%) but higher than in Nassau County (4.8%).

Suffolk Unemployment Rate (October of each year)



Inflation remains moderate in the region, but it has increased slightly. The consumer price index for the New York metropolitan area increased by less than 4% in each of years 1992 through 2007. Inflation for 2007 was 2.8%, and inflation has been running at 4.3% in 2008 through October.

Major Employers

In 2007, 36 private employers each had more than 2,000 workers on Long Island. These employers cover a wide range of industries, including health care, telecommunications, banking, educational institutions, and department stores. The North Shore Health System, a network of 14 hospitals and other health care centers, is Nassau-Suffolk's largest employer, has 31,000 employees. Catholic Health Services employs 14,000 in Nassau-Suffolk. The Winthrop Health System (hospitals), Stop & Shop supermarkets, the Long Island Railroad, and Cablevision (telecommunications) each employ more than 6,000 on Long Island. The next largest employers are Adecco (staffing services), Verizon (telecommunications), Waldbaums supermarkets, Pathmark supermarkets, the Diocese of Rockville Centre, King Kullen supermarkets, Home Depot, Federated Department Stores, KeySpan (utility), and CVS, each of which employ between 4,000 and 6,000 in Nassau-Suffolk. Other companies employing at least 2,000 in Nassau-Suffolk include Long Island University, UPS, *Newsday*, JPMorgan Chase, Citigroup, NBTY (manufacturer of vitamins and supplements) Estee Lauder (manufacturer of cosmetics) and Northrop Grumman (defense contractor).

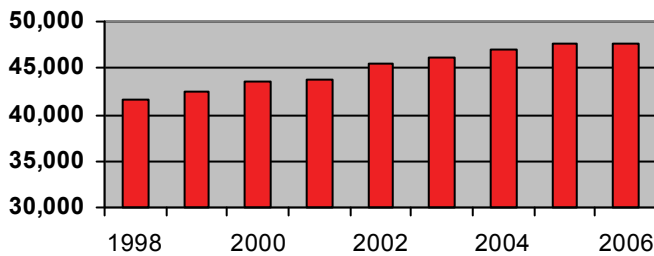
Large government employers in Nassau-Suffolk include 127 school districts which together employ 85,000 people (as of July 2008), state government which employs 25,000, and federal government which employs 18,000 (including 9,000 postal workers). Suffolk County government employs 11,000 people.



Suffolk County has over 47,000 businesses.

The number of businesses located in Suffolk County continues to rise. Of all counties in the U. S., Suffolk County ranked 13th in the number of business establishments in 2006. There were more than 47,000 business establishments with payroll in 2006 in Suffolk, an all-time high and a 9% increase since 2001. The largest numbers of businesses are in the retail trade category; followed by “professional, scientific & technical services,” and construction. Sixty-three percent of Suffolk’s businesses employ fewer than 5 persons, and 78% of businesses in Suffolk employ fewer than 10 persons. In addition, in 2006 Suffolk County had more than 118,000 “non-employer” firms, mostly self-employed individuals operating very small unincorporated businesses. The number of these businesses has grown 13% since 2002.

**Number of Businesses With Payroll
Suffolk County**



Suffolk County contains 17 communities which each contained more than 10,000 private sector jobs in 2006, according to the U. S. Census Bureau. Employment in these areas is high because of concentrations of office, industrial, or institutional development. The largest employment centers in Suffolk County are Melville, Hauppauge, and Farmingdale, which each contain more than 30,000 jobs. Melville alone has 63,000 jobs.

Tourism and Recreation

Suffolk County is a large tourist market. Eastern Suffolk County is a major tourist and second-home destination, with one of the largest concentrations of second homes of any county in the United States. There are approximately 37,000 second homes in eastern Suffolk, which draw approximately 150,000 part-time residents with large purchasing power to the area during summer and on weekends. Eastern Suffolk County also contains 5,800 lodging rooms, ranging from traditional motels to luxurious

boutique hotels and bed & breakfast inns. These lodging properties draw thousands of tourists to Suffolk County’s east end throughout the year, but primarily in the summer months. The population in eastern Suffolk increases by more than 200,000 persons during peak summer times due to tourism, more than doubling the year-round population.



The Montauk Lighthouse.

Suffolk County has a long golfing tradition. The County now has 84 golf courses, including 15 courses constructed since 2000. The 2004 U. S. Open was held at the Shinnecock Hills Golf Club in Southampton. In 2002 the U. S. Open was played at Bethpage State Park Golf Club in Nassau County near the border with Suffolk County and will return there again in 2009, bringing tourism-related commerce.

Suffolk County’s 6,000 seat ballpark, home to the Long Island Ducks independent league baseball team, opened in 2000 in Central Islip. Attendance at Ducks games at the park has been very high. In 2000 a new 42,000 square foot aquarium opened in Suffolk County, the Atlantis Marine World aquarium in downtown Riverhead. The aquarium attracts hundreds of thousands of visitors each year. A hotel adjacent to the aquarium is planned. Another aquarium has been proposed as part of the redevelopment of the Pilgrim Psychiatric Hospital property in Brentwood. In 2002 SUNY Stony Brook completed its new \$25 million stadium, the largest outdoor sports arena in Suffolk County, an 8,254 seat venue that will be used for concerts and other events.

Farming

The value of agricultural production in Suffolk County is the highest of any county in New York State. As of 2002 there were 34,000 acres of farmland in the County, primarily in eastern Suffolk County. Farmland acreage in the County declined for decades after World War II as farmland was sold to residential developers. By the 1990s, farmland acreage remained fairly steady. Some farms have converted to the low labor, high value production of sod, ornamental and nursery plants, and grapes. Once famous for oysters, potatoes, and ducks, Suffolk County is becoming well-known for its quality wines.

Farming and tourism in Suffolk County are interrelated. Farmland provides an open and rural character that offers a change from the congested areas in and around New York City.

Eastern Suffolk's numerous farm stands offer fresh local produce to local residents and visitors. Several downtown areas in western Suffolk have green market programs where local produce is sold.



Agriculture is an important industry in Suffolk County.

In the 1970s, Suffolk County implemented the nation's first Farmland Preservation Program, whereby the County purchases the development rights to agricultural land for the purpose of preserving open space and working farms. Suffolk County now owns the development rights to more than 9,100 acres of farmland.

DEVELOPMENT TRENDS

Office Market

Suffolk County has a substantial office market. It contains more than 24 million square feet of non-government office buildings. This figure includes 3.8 million square feet of new office space built since 2000. An additional 2.7 million square feet of office space has been proposed but is not yet built. The office market in Suffolk County remains fairly healthy and stable. According to CB Richard Ellis, the office vacancy rate in Suffolk County was 15.8% in the 3rd quarter of 2008, one point higher than the rate in the 3rd quarter of 2007. Yet this vacancy rate remains lower than the national suburban office vacancy rate. Average office rental rates have increased modestly over the past year, \$25.40 in the 3rd quarter of 2008, a 2.0% increase over the same quarter in 2007.



An office building in Melville.

The Route 110 Corridor in western Suffolk County has become the center of Long Island's business community. Melville alone has 8.7 million square feet of major office space and there are

over 1,500 acres of industrial development in Melville and East Farmingdale. In addition to being the headquarters of Newsday, the 19th largest newspaper in the United States in circulation, Melville is also home to other large corporate headquarters. These include OSI Pharmaceuticals, Sbarro, Arrow Electronics and Henry Schein, a distributor of health care products and services. Rubie's Costume is currently constructing a new 103,000 square foot headquarters office building on Route 110 at the intersection with the Long Island Expressway. Canon USA is planning to move its headquarters from Nassau County to Melville in Suffolk County. The company plans to construct a 690,000 square foot office building by 2010, where more than 1,100 employees will work.

After Melville's 8.9 million square feet of office space, the largest concentrations of private office space in Suffolk County are located in Hauppauge (3.5 million square feet), Islandia (1.9 million), Bohemia (900,000 square feet) and Ronkonkoma (800,000 square feet).

Land costs for office development have become very expensive in some areas of the County, such as Melville and Hauppauge. Some new office space has been created in these high value areas by the conversion of older industrial buildings to higher office uses. However, with the upheaval in the national banking system and financial markets in 2008, the performance of the office market into 2009 is expected to suffer.

Industrial Market

Suffolk County contains significant industrial space. According to Grubb & Ellis, there is 91 million square feet of industrial square footage in Suffolk County, nearly two-thirds of the industrial space on Long Island. Most of the space is general industrial space, but a large portion is warehouse and distribution space and a significant smaller portion is R&D/flex space. East Farmingdale contains a large amount of older industrial space. The largest concentration of industrial space in Suffolk County is located in Hauppauge. A significant industrial corridor has emerged in the Veterans Highway area near MacArthur Airport in Ronkonkoma and Bohemia. Further east, significant new industrial space continues to be developed in the Yaphank area.

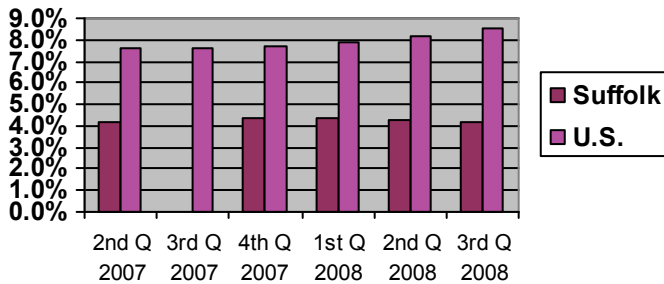


Suffolk County Contains 91 million square feet of industrial space.

The industrial market in Suffolk County remains very strong. The average asking rental rate in Suffolk County for industrial space was \$7.78 in the 3rd quarter of 2008, among the highest in the nation but significantly lower than Nassau County's rate of \$10.75. As of the 3rd quarter of 2008, the industrial vacancy rate on Long Island was 4th best in the nation and is expected to remain strong. According to Grubb & Ellis, Suffolk County's

industrial vacancy rate was 4.2% in the 3rd quarter of 2008, lower than in the third quarter of 2007. In some areas, industrial buildings have been converted to office buildings (fetching higher rents), contributing to the improving industrial vacancy rate. There is also pressure for some industrially zoned land to be developed for housing.

Industrial Vacancy Rate, Suffolk County vs. U.S.



Continued demand for industrial space has spawned significant new industrial construction in central Suffolk County, especially in the Yaphank area, where there is a New York State Empire Zone. Global Tissue plans to construct a new 175,000 square foot headquarters on 23 acres in Yaphank. Sysco Corp., the nation’s largest supplier of food for restaurants and food service facilities, plans to build a 375,000 square foot regional headquarters in Yaphank on the site of the Parr Meadows racetrack. Quality King, a distributor of pharmaceutical, health and beauty products, opened a new 580,000 square foot warehouse in Yaphank in late 2007. In addition, a \$450 million 350 megawatt gas-powered electric power plant is under construction in Yaphank and expected to come online in 2009.

The 300 acre Heartland Business Center industrial park in Brentwood opened in 1990 and is now home to 3.5 million square feet of industrial space and 3,000 workers. An adjacent 87 acre parcel has recently been opened for development and will add 1.3 million square feet of space and 1,000 jobs to the industrial park. Alcan Packaging, a company that considered moving its operation off Long Island, recently built a new 200,000 square foot building in the Heartland Business Center. The area around Long Island MacArthur Airport also continues to receive new office and light industrial construction, adding more than one million square feet of industrial space in the past few years. A 230,000 square foot building was completed at 545 Johnson Avenue in Bohemia in 2008.

A commercial and industrial real estate developer, Rechler Equity Partners, has been selected by Suffolk County to build the Hampton Business and Technology Park. This commercial and industrial center will be located at the County-owned Gabreski Airport in Westhampton and will eventually total 485,000 square foot of development on 53 acres, including a 145 room hotel.

Suffolk County plans to triple the sewage treatment capacity in the Hauppauge Industrial Park, the second largest industrial park

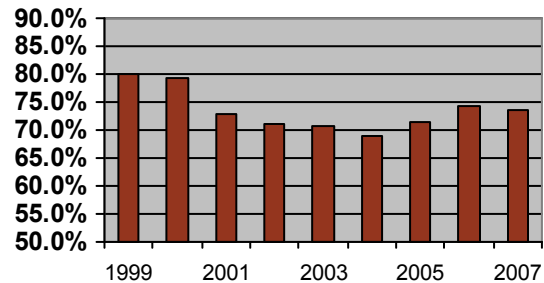
in the country. This sewage system upgrade will allow more businesses to hook up to the new system, which will have environmental advantages and will reduce costs to businesses already connected to the existing system. The upgrade also will accommodate the trend toward converting industrial space to office space.

Hotels and Motels

Suffolk County’s extensive industrial, office, and tourist markets support a large number of hotels, motels, and bed & breakfast inns. Suffolk County contains 319 hotels, motels, and inns. These lodging properties have approximately 12,200 rooms. Of those, about one-quarter are open only seasonally, half the year in the warmer months. Suffolk County’s seasonal hotels are located primarily in eastern Suffolk County, mostly in the Hamptons.

Since 2003, more than 1,500 lodging rooms have been added in Suffolk County, primarily in western Suffolk, increasing the total number of rooms by 15% in the past five years. Correspondingly, the hotel occupancy rate in western Suffolk County declined in 2002 through 2004, but occupancy rebounded to 74.3% in 2006 and held relatively steady at 73.6% in 2007, according to Island Publications.

Hotel Occupancy Rate, Western Suffolk County



Since 2007, two large Marriott-brand hotels opened in Farmingdale near Republic Airport, and a Hilton Garden Inn opened in Melville/Plainview and also in Riverhead. There are at least 10 additional hotels proposed to be built in Suffolk County, which would contain several hundred rooms. In addition, the Riverhead Resorts proposal alone would eventually add 2,000 new hotel rooms.

Retail Market

Suffolk County is a major retail market, with \$30 billion in retail sales in 2007. According to *Trade Dimensions International*, Suffolk County had retail sales per household of \$60,588, ranking among the highest in the country. According to the Suffolk County Department of Planning, Suffolk County’s shopping center space totals 39.2 million square feet. This includes more than 5.3 million square feet of new shopping center space added in Suffolk County just since 2000. In

addition, Suffolk County’s traditional downtown centers contain 8 million square feet of store space.

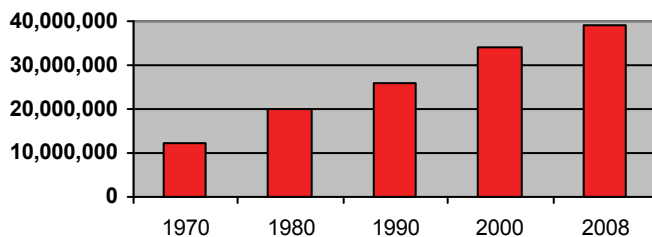
Suffolk County has three regional malls and two regional outlet shopping centers. The Tanger Outlet Center in Riverhead expanded in 1997 to become the nation’s fifth largest manufacturer’s outlet center at 777,000 square feet. The other outlet shopping center opened in 2008 in Deer Park: the 805,000 square foot Tanger Outlet Center at The Arches.

An additional 5.8 million square feet of new shopping center space is presently proposed in Suffolk County. The largest proposed shopping center on the drawing board is the 850,000 square foot Brookhaven Walk lifestyle shopping center in Yaphank.

Shopping center redevelopment and major store expansions have continued in Suffolk County. In 2006 the Smith Haven Mall in Lake Grove redeveloped a vacant department store as a \$75 million lifestyle center, an open air shopping center. A vacant portion of the Bellport Outlet Stores shopping center that was built in the 1990s was demolished and a new Home Depot was built there in 2007.

In addition to the new store in North Bellport, Home Depot built a new store in Commack in 2006. Target built new stores in Medford in 2005 and Farmingdale in 2004. Wal-Mart built new stores in Farmingdale in 2007 and Commack in 2006. Additional Wal-Mart stores have been proposed in Rocky Point, Patchogue and Riverhead. New Lowe’s stores opened in Farmingdale and Bay Shore in 2006 and in Stony Brook in 2007 and three additional new stores have been proposed. Since 2005, Stop & Shop supermarket has built three new stores, each about 70,000 square feet.

**Shopping Center Space (Sq. Ft.)
Suffolk County**



A 2005 study by the Suffolk County Department of Planning found significant improvement in the percentage of vacant stores in shopping centers and downtown business districts. In shopping centers, the percentage of stores that were vacant improved from 19% in 1996 to 12% in 2000 and 7.8% in 2005. In downtown areas, the vacancy rate improved from 11% in 1996 to 8% in 2000 and 7.6% in 2005. Many of the shopping centers in Suffolk County have been constructed or renovated in recent years. In downtown areas, revitalization efforts have contributed to the emergence of many of the County’s downtowns as vibrant centers of entertainment and dining.

Institutional Development

Suffolk County is served by 70 public school districts. The combined budget for Suffolk’s school districts for the 2008-09 school year is \$6.5 billion dollars. Public school enrollment was 254,000 in the 2007-08 school year, a 3% decline since 2004. Enrollment is now 19% higher than the low point of 1990 but 23% lower than in 1976. In recent years, major school additions have been completed in many local school districts. However, enrollment is now projected to continue to slowly decrease in the next few years.

In Suffolk County there are eight four-year colleges having a total undergraduate enrollment of approximately 33,000 students and a graduate enrollment of about 11,500 in 2006-07. Farmingdale State College has expanded in recent years and additional development is planned for the campus. In 2005 a 400-bed dormitory opened at the college and a new five year \$55 million improvement program includes a new \$29 million School of Business building. Dowling College is planning a \$16 million 87,000 square foot Student Center including a gymnasium and a new \$12.5 million outdoor athletic complex opened in early 2008. Suffolk County Community College, with more than 21,000 students and three campuses, continues to expand its facilities. In 2008 Suffolk Community College opened its 28,000 square foot Culinary Arts School building in downtown Riverhead.

The State University at Stony Brook is the largest college in Suffolk County, with 14,800 undergraduate and 7,600 graduate students in 2006. The University enrollment continues to increase and the University continues to expand its facilities. In 2005 Stony Brook University purchased the 110 acre campus of Southampton College. The University also acquired 246 acres of property in St. James in 2005 to eventually develop 10 buildings totaling 830,000 square feet, known as the Stony Brook Research and Technology Park. The first building, the 100,000 square foot Center For Excellence in Wireless Information Technology, is to be completed December 2008. Construction is underway for the next building, the Advanced Energy Research and Technology Center. The third building is expected to focus on biotechnology. In addition, \$45 million was included in New York State’s adopted 2008 budget for Stony Brook University to establish a law school.

There are 12 hospitals in Suffolk County. According to the New York State Health Department, Long Island hospitals are spending hundreds of millions of dollars on major construction projects to expand and modernize their facilities. In 2008, Stony Brook University Hospital completed a six year \$300 million hospital revitalization project, including a 150,000 square foot expansion and the renovation and expansion of its emergency, surgical and obstetrics departments. Peconic Bay Medical Center in Riverhead is undergoing a \$35 million expansion and renovation. In 2008 it completed an expansion of its emergency department and construction of a new 40,000 square foot surgical pavilion is underway, scheduled to open in 2009.

In 2007 Brookhaven National Laboratory, an atomic energy

research facility that employs 2,600 people, completed an \$81 million 94,000 square foot building funded by the U. S. Department of Energy, the Center for Functional Nanomaterials. Funding for major new additional research buildings at Brookhaven National Lab is being sought. Brookhaven National Laboratory was chosen by the U. S. Department of Energy as a potential site for the National Synchrotron Light Source II. \$65 million was allocated to the project with a projected construction cost of \$925 million. \$162.1 million was also allocated for the continuing operation of the Lab's Relativistic Heavy Ion Collider.

Other Major Development Activity

Suffolk County contains several areas that are current and future engines of growth and development. In 2002, a 460 acre surplus portion of the Pilgrim State Psychiatric Center in Brentwood was sold by New York State to a developer, and a \$4 billion mixed-use community has been proposed for the site at the intersection of the Long Island Expressway and the Sagtikos Parkway. As proposed, the site will eventually be developed in stages, with 1,000,000 square feet of upscale lifestyle retail, 9,000 units of multi-story rental housing, 3,000,000 square feet of office space, a hotel, a cultural center and an aquarium. Environmental impact studies prepared for this major development proposal are currently under review by the Town of Islip.

The area which formerly contained the Central Islip Psychiatric Center continues to undergo major redevelopment. Suffolk County's 500,000 square foot Cohalan County Court Complex was completed in 1996 and the \$212 million 822,000 square foot federal courthouse opened in 2000. In 2006 Touro Law School completed a new \$35 million 200,000 square foot law school building adjacent to the courthouses. In 2000 a \$16 million ballpark opened in Central Islip on the site, home to the Long Island Ducks baseball team. An old hospital building was renovated into a 175,000 square foot office building, and more than 1,000 units of rental and owner-occupied housing have been built on the former psychiatric hospital property, and more units are under construction and planned. A new hotel and new restaurants are also proposed.

The Route 58 corridor in Riverhead continues to be developed into a major commercial center. The Tanger Outlet Center on Route 58 was built in 1994 and expanded in 1997 to approximately 800,000 square feet, making it one of the nation's largest outlet shopping centers. The 395,000 square foot Riverhead Centre shopping center opened in 2002 on Route 58. In total there is more than 2 million square feet of retail space on Route 58 in Riverhead, and an additional 1.1 million square feet of retail has been proposed there. An 89 room Holiday Inn Express opened on Route 58 in 2005, a 114 room Hilton Garden Inn opened in 2008, and a 140 room Marriott Residence Inn is proposed.

Calverton Airport in the Town of Riverhead, formerly owned by the U. S. Navy and used by Grumman Corporation to test aircraft, continues to be redeveloped. Many of the former Grumman buildings are being reused for various commercial and light industrial purposes. In addition, substantial new development has been proposed for the area immediately

surrounding the runways, known as Enterprise Park at Calverton (EPCAL). There is a proposal for 3.8 million square feet of new office and industrial space on 550 available acres. On another 755 acres zoned for recreation uses, developers have proposed a \$2.1 billion project called Riverhead Resorts, with 2,000 hotel rooms and 2,200 time share units in eight hotel properties featuring various forms of outdoor and indoor recreation and entertainment.

In Yaphank, in addition to the power plant and industrial construction underway, proposals have been received to develop County-owned land in Yaphank, including substantial affordable housing units on 110 acres and industrial development on 80 acres. It is expected that the selection of a developer will be announced shortly.

TRANSPORTATION

Roads

Traffic congestion is a problem in Suffolk County that has increasingly worsened during the last 25 years. The number of registered vehicles continues to increase faster than population. As of 2007 there were 1.2 million registered vehicles and 1.1 million licensed drivers in Suffolk County. There are now 2.44 vehicles for every household in Suffolk County.

New York State had planned to begin reconstruction in 2009 of portions of three arterial highways to improve safety and traffic flow: Route 110, Route 112, and Route 347. However, state budget shortfalls may delay some of these improvements. The New York State Department of Transportation also plans to construct an \$85 million inter-modal truck/rail depot on 105 acres on the former grounds of Pilgrim State Hospital in Brentwood. This facility would receive freight by rail and then transfer the goods to trucks for local transport. The aim is to transport more goods by freight and less by truck, since presently only 1% of the goods delivered to Long Island arrive by rail, compared to the national average of 15%. Another inter-modal site is already under construction in Yaphank south of the Long Island Expressway.

Mass Transit

Suffolk County is served by an extensive commuter rail system, the Long Island Railroad (LIRR), which is controlled by the Metropolitan Transportation Authority. The LIRR is the largest commuter rail system in the country. There are 41 Long Island Railroad stations in Suffolk County. The Long Island Railroad received \$2.6 billion in funding from the U. S. Department of Transportation for its East Side Access project. The overall \$6.3 billion project will connect the Long Island Railroad's main line to Grand Central Station in Manhattan. The project has begun construction and will provide a direct and faster trip between Long Island and east Midtown Manhattan. The expected completion date is 2013.

The Long Island Railroad plans to study the prospect of re-opening the Republic train station near Route 110 in East Farmingdale, which could lead to a 1.2 million square feet of additional development in the area.

Because the population and major employment centers in Suffolk County are dispersed, it is difficult to effectively serve the population with mass transit. Consequently, as of 2007, 80% of employed Suffolk residents drove alone to work. However, Suffolk County has a bus system and bus ridership has increased in recent years.

Airports

Suffolk County has five active airports. The vast majority of Suffolk County's passenger traffic takes place at Long Island MacArthur Airport in Ronkonkoma, Long Island's only airport with scheduled service. MacArthur, owned and operated by the Town of Islip, serves 2.3 million passengers annually. MacArthur airport is served by Southwest Airlines and US Airways. Southwest recently completed a \$55 million terminal project at MacArthur that added four new gates. Construction has begun on a new \$25 million air traffic control tower that will replace the original tower that was built when the airport opened in 1962. The new tower will be fully operational in 2010.

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