



ANNUAL REPORT 2023-2024

Department of Economic Development & Planning

SUFFOLK COUNTY

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TABLE OF CONTENTS

ANNUAL REPORT TO THE COUNTY LEGISLATURE AND THE COUNTY EXECUTIVE _____ 3

Forward by Jennifer Casey, Chairwoman _____ 3

Suffolk County Planning Commission Overview _____ 5

2023 Accomplishments _____ 5

COUNTY OVERVIEW _____ 8

ECONOMIC INDICATORS _____ 9

Demographics _____ 9

Economic Base _____ 12

ANNUAL REPORT TO THE COUNTY LEGISLATURE AND THE COUNTY EXECUTIVE

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, in collaboration with the Suffolk County Department of Economic Development & Planning, aims to promote the development of livable, inclusive, sustainable, and economically vibrant communities by providing guidance to local municipalities at the county level. This is achieved through active engagement and dialogue with local governments and public agencies to address inter-community and countywide issues related to land use, housing, public space, transportation, environment, water quality, and economic development.

In the context of project reviews, the Commission has processed 1,129 referrals from municipalities in accordance with the Suffolk County Administrative Code A14. These referrals encompassed a variety of projects, including 68 Change of Zone requests, 446 Variances, 55 Subdivisions, 242 Code Amendments, and 157 Site plans.

Suffolk County is a highly sought-after location for living, working, visiting, and shopping in the United States. However, it faces significant decisions that will shape its future, such as addressing wastewater impacts on water quality and coastal resiliency, managing increased congestion, adapting to the shift from traditional retail to online shopping, diversifying housing options for low- and middle-income families, remaking shopping malls and office parks with adaptive reuse tactics, and enhancing civic participation. The county's new leaders and residents need to use creativity and bold leadership by collaborating to address complex issues such as wastewater management, culminating in the adoption of a long-term Subwatersheds Wastewater Plan and securing the necessary funding for the expansion of wastewater treatment capabilities.

The Commission acknowledges and appreciates the expertise, thoroughness, and collaboration of the County's Department of Economic Development & Planning staff. In 2023, the Commission engaged in various comprehensive planning activities, including discussions on environmental justice, inclusive housing, coastal resiliency, and the opportunities presented by the County's Landbank Program and renewable energy projects. Furthermore, the Commission continued its partnership with Touro Law Center's Land Use Institute, with members participating in the Long Island Land Banks and Land Trusts, as well as Water Quality Panel: Suffolk County Clean Water Mission. Looking ahead to 2024, the Suffolk County Planning Commission is committed to continuing its collaborative efforts with local organizations to foster innovation and seize opportunities that will contribute to Suffolk County's promising future.

Thank you to each of the members of Suffolk County Planning Commission for their professional insight, expertise and thoughtful contributions to this body.

2023 SUFFOLK COUNTY PLANNING COMMISSION

Lasheca Lewis
Babylon

John Coverdale
Brookhaven

David B. Doty
East Hampton

Jennifer Casey
Huntington

Timothy McCarthy
Islip

John Condzella
Riverhead

Elizabeth Galle
Shelter Island

John J. Finn
Smithtown

Daniel J. Flynn
Southampton

Thomas McCarthy
Southold

Lisa Perry
Over 5,000 Population

VILLAGES

Michael Kaufman
Under 5,000 Population

Stephanie Baldwin
Kevin Gershowitz

AT LARGE

Errol Kitt

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.

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, and
- There are three at-large representatives

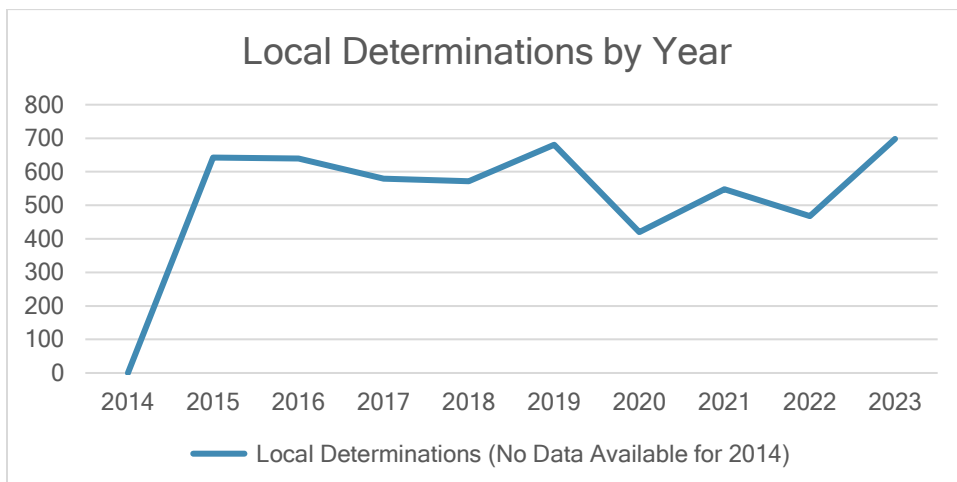
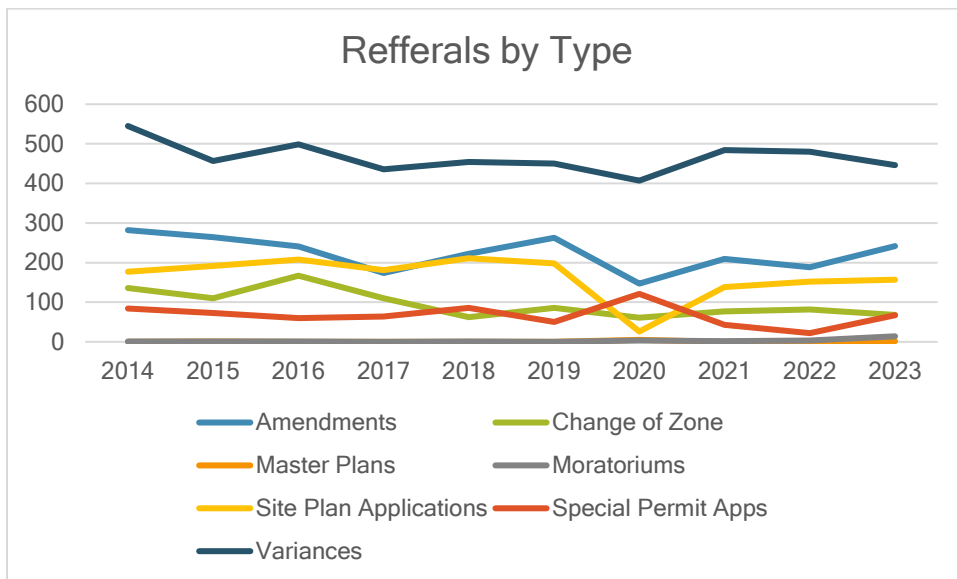
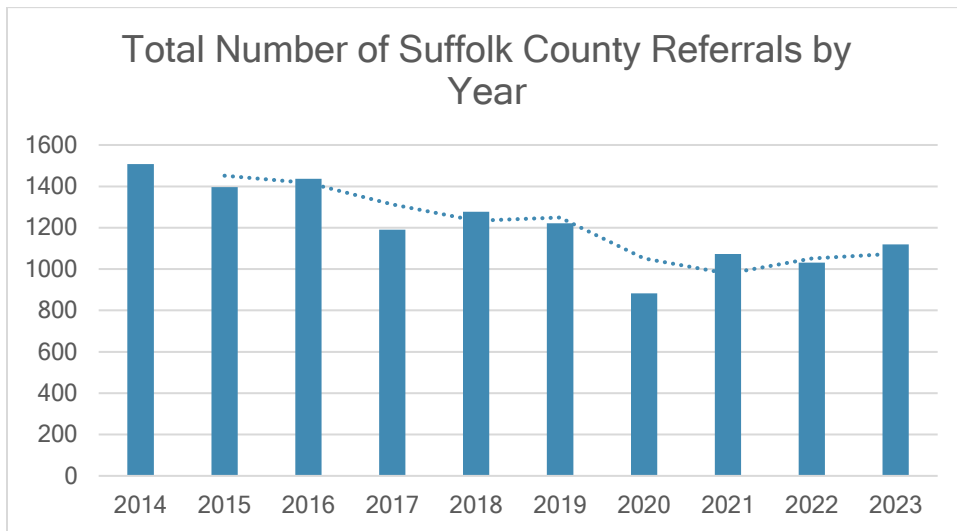
2023 Accomplishments

2022-2023 Suffolk County Planning Commission Referrals Processing

Zoning Referrals	2023	2022
Amendments	242	188
Change of Zone	68	82
Master Plans	2	1
Moratoriums	14	3
Site Plan Applications	157	152
Special Permit Apps	67	22
Variances	446	480
COU	1	3
IMA	2	0
SEQRA	65	40
ER	0	1
Total Subdivision Referrals	55	59
ER		
TOTAL REFERRALS	1119	1031
COMMISSION ACTIONS		
SCPC Local Determinations	698	468
SCPC No Actions	0	1
SCPC Approvals	30	23
SCPC Disapprovals	1	0
Incomplete	8	1
Adjourned	1	1
TOTAL PC ACTIONS	40	26

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

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



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 \$128.4 billion in 2022, an increase of 1.8% over the 2021 figure. The County's 2022 per capita personal income was \$84,201, ranking 4th highest out of the 62 counties in New York State and in the top 4.5% out of all counties in the nation.

As the table below shows, the median household income in the County was \$119,838 in 2022, placing it 60% higher than the median household income in the nation as a whole and 50.6% higher than in New York State. In addition, the percent of persons living in poverty in the County was 6.5% in 2022, significantly lower than the State and the United States.

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

Area	2017		2022	
	Median Household Income	Persons Below Poverty (%)	Median Household Income	Persons Below Poverty (%)
Suffolk County	\$94,750	6.8 %	\$119,838	6.5%
New York State	64,894	14.1	79,557	14.3
United States	60,366	13.4	74,755	12.6

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

According to the U.S. Bureau of Labor Statistics, the average annual pay on Long Island in 2022 amounted to \$78,560, an increase of 35.82% in the five years since 2017. This increase was greater than the rate of inflation over the same period, which was 19.4%.

According to the U. S. Census Bureau, the County has a relatively well-educated population. Among residents age 25 and over in 2022, 91% were high school graduates and 40% held a bachelor's degree or higher. These figures compare to 90% and 36%, 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 \$105.05 billion in 2022. Its gross domestic product increased by 4% since 2019.
- According to the New York State Department of Labor, as of August 2023, there were 1,341,100 jobs in the region, an increase of 11,800 or 0.12% since August 2022.

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

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

Industry	August 2022	August 2023	% Change
Goods Producing			
Mining, Logging & Construction	84.8	79.6	-6.13%
Manufacturing	69.9	70.5	+0.86%
Service Providing			
Wholesale Trade	64.6	62.5	-3.25%
Retail Trade	148.5	142.9	-3.92%
Transportation, Warehousing & Utilities	42.1	41.4	-1.66%
Information	15	14.4	-4.00%
Financial Activities	73	72.3	-0.41%
Professional & Business Services	182.6	186.1	+1.92%
Private Education & Health Services	274.9	278.2	-1.20%
Leisure & Hospitality	145.9	148.4	+1.71%
Other Services	56.2	58	+3.20%
Government	<u>181.1</u>	<u>186</u>	<u>+2.7%</u>
TOTAL NON-FARM	1,338.6	1,340.3	+0.12%

Industry	August 2022	August 2023	% Change
Goods Producing			
Mining, Logging & Construction	84.8	79.6	-6.13%
Manufacturing	69.9	70.5	+0.86%

Service Providing			
Wholesale Trade	64.6	62.5	-3.25%
Retail Trade	148.5	142.9	-3.92%
Transportation, Warehousing & Utilities	42.1	41.4	-1.66%
Information	15	14.4	-4.00%
Financial Activities	73	72.3	-0.41%
Professional & Business Services	182.6	186.1	+1.92%
Private Education & Health Services	274.9	278.2	-1.20%
Leisure & Hospitality	145.9	148.4	+1.71%
Other Services	56.2	58	+3.20%
Government	181.1	186	+2.7%
TOTAL NON-FARM	1,338.6	1,340.3	+0.12%

Source: New York State Department of Labor

- As of August 2023, the County's unemployment rate was 3.5%, the same as the figure recorded in August 2022, and lower than the 4.5% recorded in August 2021.
- The County unemployment rate in August 2023 was lower than the rate in the Nation (3.9%), the State (4.4%) and in New York City (5%). As of August 2023, there were 797,300 employed residents in the County. This figure was 1.2% higher than the August 2022 figure (787,800).

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
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+
Canon	Optical, Imaging and Industrial Products Medical Products and Services	Melville	Corporate Headquarters	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+

Source: Suffolk County Planning Department

- According to the U.S. Bureau of Labor Statistics, there were 54,239 private business establishments located in the County in the fourth quarter of 2022, an increase of 4.1% since the fourth quarter of 2017 (52,095).
- The County has a mix of large and small employers. According to the U.S. Census Bureau, as of 2020, there were 26 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 9 or fewer. In addition, according to the U.S. Census Bureau, in 2020, the County had 142,492 “non-employer” firms, mostly self-employed individuals. The number of these businesses increased by 12% in the five years between 2015 and 2020.



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

Economic Base

The County has a substantial commercial office building market. According to CBRE, a multinational real estate firm, the office availability rate on Long Island was 15% in the 4th quarter of 2023, higher than the 13.4% availability rate in the 4th quarter of 2022. The average office space rental rate was \$30.19 per square foot in the 4th quarter of 2022, an increase of 3.1% over the 4th quarter 2022 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 200,000

square feet of new office space constructed in the five years since 2017. An additional 2.7 million square feet of office space has been proposed for future construction.

The County has significant industrial space totaling 110.6 million sq. ft., according to the commercial real estate advisory firm Newmark Knight Frank. The industrial market fundamentals remained very strong through the 4th quarter of 2023. According to Newmark, Long Island's industrial vacancy rate in the 4th quarter of 2023 was 4.5% and the industrial asking rent was \$16.95 per sq. ft., an increase of 2.9% over 2022 measures. 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. Northwell's South Shore Hospital in Bay Shore is currently undergoing a planned \$500 million, five year campus transformation that includes a \$71 million, 34,450 square-foot Women and Infants Center.



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 12,015 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 2018, more than 450 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 an annual retail demand of \$20.3 billion in sales estimated in 2023, according to Esri Business Analyst. According to Gale Business Center, 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 50.3 million square feet and an additional 2.5 million square feet of new retail space is proposed for construction. 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.



Source: Patchogue Village, Photo by Samantha Kennedy, Unsplash

Tourism is a multi-billion dollar industry in the County. The County represents 56% of the region's tourism sales, with \$3.7 billion in direct tourism spending, as of 2022, according to the consulting firm Tourism Economics. Tourism supports 66,250 local jobs in the County and generates \$459 million in local and state tax revenues annually. 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 Discover Long Island, the occupancy rate of the County's hotels was 67.3% in 2023, slightly higher than the 65.7% figure in 2022. Average daily room rates (ADR) in 2023 decreased in the same period by 1.6% to \$204.80. However, the County's September 2023 ADR was \$222.47, a 36% increase since 2019. RevPAR in 2023 increased by 0.9% to \$137.84, significantly higher than that of New York State (\$158.94) and the Nation (\$100.16).



Source: North Fork, Photo by Juliana Malta, Unsplash

Suffolk County is home to two out of three of Long Island’s wine growing American Viticultural Areas (AVAs), with a significant number of wineries located on the North Fork. It is planted nearly exclusively with *vitis vinifera* grapes, classical varieties 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 70 wineries, 40 craft breweries (the most of any county in the State), 6 cideries and 5 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.



Source: North Fork, Photo by Neil Daftary, Unsplash

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, in 2022 commercial fishing establishments in New York's coastal waters landed more than 27 million pounds of fish, valued at nearly \$40 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 October 2023, there are 42 shellfish aquaculture leases in place, which cover 560 acres of County-owned underwater lands.