

# ***Jamaica Brownfield Opportunity Area Nomination Study***

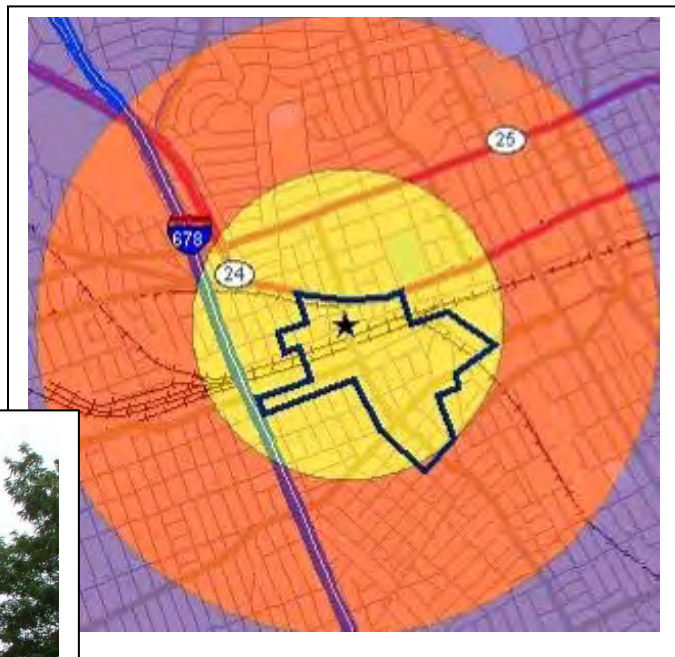
**Community of Jamaica  
Queens County, New York**

**Study Submitted By:**



**Greater Jamaica  
Development  
Corporation**

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Developed in Conjunction with the New York State Department of State and the New York State  
Department of Environmental Conservation

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# Executive Summary

## BOA Sponsorship and Partners and Study Structure

The Jamaica Brownfield Opportunity Area (BOA) Nomination Study began on June 8, 2006, with an introductory meeting with community leaders, elected officials and city and state agencies. An invitation was extended to all of these stakeholders to participate in an Advisory Committee for the Nomination Study, the purpose of which was to provide an in-depth and thorough description and analysis, including an economic and market trend analysis, of existing conditions, opportunities, and reuse potential for properties located in the proposed Brownfield Opportunity Area.

The Advisory Committee provided community-based guidance for reaching the project goal, which was to identify the reuse potential of priority brownfield sites identified through the BOA analysis that could be catalysts for revitalization and to guide redevelopment scenarios for these brownfield sites. A “brownfield” or “brownfield site” is defined in New York State Environmental Conservation Law Article 27, Title 14, as any real property, the redevelopment or reuse of which may be complicated by the presence or potential presence of a contaminant.

Greater Jamaica Development Corporation (GJDC), a community-based organization with a 40-year history of successful economic development efforts in Downtown Jamaica, is the sponsoring organization for the Jamaica BOA Nomination Study.

GJDC has well-established working or contractual ties to several key city agencies that have significant interest in development. These include the Department of Small Business Services, with whom GJDC has several contracts to improve the business environment and contribute to community development; the New York City Economic Development Corporation, with whom we have funding agreements for infrastructure improvements; the Department of City Planning, with whom we consulted when establishing the BOA boundaries, and the Office of Environment Remediation, which provided a letter indicating municipal support for our initial proposal for BOA funding to conduct this Nomination Study. All of these agencies joined Community Board 12, residents, and local business people on our Advisory Committee.

The Nomination Study was conducted with the support of a State Assistance Contract awarded by the New York State Departments of State and Environmental Conservation.

## Study Structure

A significant amount of the funding was used to assemble a team of consultants to provide the critical information needed to inform redevelopment scenarios in alignment with the goals and objectives described below. These consultants would conduct studies in specific aspects for redevelopment:

- A market demand study for office, industrial, residential and retail development;
- An analysis of infrastructure improvements that would be required to support redevelopment;
- An environmental assessment of strategic sites; and
- A feasibility study to estimate costs and the necessary market value required to redevelop the strategic sites.

## Public Participation

The following vision statement and goals and objectives identified as the guiding principles for the Study

at a meeting of the Advisory Committee on June 8, 2006.

### Jamaica Community BOA Vision Statement

To create through the BOA process the opportunity for revitalization, rehabilitation and community oriented redevelopment of underutilized, vacant, blighted and environmentally impaired areas of Jamaica.

### Community Goals and Objectives

- Improve Quality of Life for Residents

Existing land uses in the Study Area, such as automotive junkyards and their associated environmental impacts, as well as vacant lots and abandoned buildings, are generally perceived as negatively impacting quality of life in the community. Redevelopment associated with the BOA initiative will bring more environmentally friendly and visually benign uses, such as modern retail or flex manufacturing space, that will have the additional benefit of making the area more attractive to work, recreate and live in, and simultaneously increase economic activity. This vision includes elements such as improved pedestrian walkways, added green-space or “green corridors” along Archer Avenue, or other amenities associated with redevelopment.

Advisory Committee members sought an improvement in retail variety and quality as part of their vision for an improved quality of life. This included such amenities as a “tablecloth” or “sit-down” restaurant and better quality retail sources for fresh meat and produce.

- Create Economic Growth and Opportunities in the Community

The community has identified creation of high-paying, quality jobs in Jamaica as a primary objective. The vision for redevelopment of under-utilized industrial properties, while retaining those “good actors” currently in place, is an important step towards bringing such jobs to the community. Simultaneously, the removal of junkyards and other noxious uses from these areas is seen as a critical component of both enhancing the use of industrial areas and removing a visual blight that diminishes the value of nearby residential and commercial property and discourages re-development.

- Create Affordable Housing Opportunities Scaled to Community Infrastructure

The recent re-zoning of 368 blocks in Jamaica, led by New York’s Department of City Planning under their “Jamaica Plan,” provided residents with an opportunity to consider many of the issues surrounding housing in areas zoned for residential use. The vast majority of the Jamaica BOA is zoned for commercial and industrial use, but where opportunities for residential redevelopment do exist, that redevelopment should not increase residential density beyond the capacity of local infrastructure, especially schools, to absorb any increase in population. In addition, residential development should be affordable to those that already live here.

The concerns of the community, identified through the BOA Nomination Study public outreach process, centered on issues surrounding development in a general sense. Much of the community’s concerns have been an outgrowth of a recent re-zoning initiative led by the New York City Department of Planning. This rezoning initiative was in response to a need for additional densities in some areas to accommodate the City’s growing population, as well as re-zoning of portions of the BOA from low density industrial uses to higher density commercial uses. Within this context, the community voiced the following objectives:

- Provide adequate parking for residents
- Minimize conflicts between industrial and nearby residential uses

- Increase community input on development projects in Jamaica
- Address public health issues related to environmental contamination
- Relieve overcrowding of schools, especially in relation to any high-density residential development
- Create opportunities for investment in development projects by the local community
- Provide amenities that cater to residents as well as visitors
- Eliminate junkyards and stop illegal dumping
- Avoid the use of eminent domain to achieve objectives: the owner of a property should be the person who decides what should be done with it
- Redevelopment for big box retail use should be viewed with caution and be subject to community approval
- The community should have “first crack” at redevelopment of vacant properties
- Address retail needs that are currently unmet, including development of a sit-down or “tablecloth” restaurant and greater restaurant choice in general, provide better access to fresh meats and produce, and increase personal service businesses, such as dry cleaners
- Increase number of parks and the “greening” of the neighborhood (trees and open spaces); however, these needs must address potential for these spaces to become a setting for crime in the neighborhood

### **The BOA Area and Strategic Approach to the Nomination Study**

The BOA Study Area is within Jamaica, Queens, an urban sub-center in the southeast portion of the county, one of the five boroughs comprising the City of New York. The Study Area is 132 acres (approximately 0.2 square miles), covering 40 blocks and containing 616 properties. It is largely to the south of the Long Island Railroad (LIRR) station in Downtown Jamaica, with the exception of a portion that runs along Archer Avenue and Jamaica Avenue north of the LIRR tracks.

Jamaica was first settled by the Dutch in 1656 and was the county seat of Queens when the county was formed in 1683. Today, it is an urban sub-center that, while having vacant and underutilized properties and brownfields in the BOA, has no remaining natural resources following 300-plus years as a center of commerce and governance.

Land use in the Study Area is predominantly industrial and commercial, including automotive and heavy industrial uses. It also includes some stable residential areas and a substantial amount of transportation-oriented property. The automotive uses are primarily used car parts and auto junkyards; the heavy industrial users are cement plants. Due to the types of uses prevalent in the BOA Study Area, and the fact that prior to re-zoning in 2007 approximately 80% of the total land in the BOA Study Area had been zoned and used for industrial purposes for almost half a century, the majority of non-residential properties are regarded as brownfields.

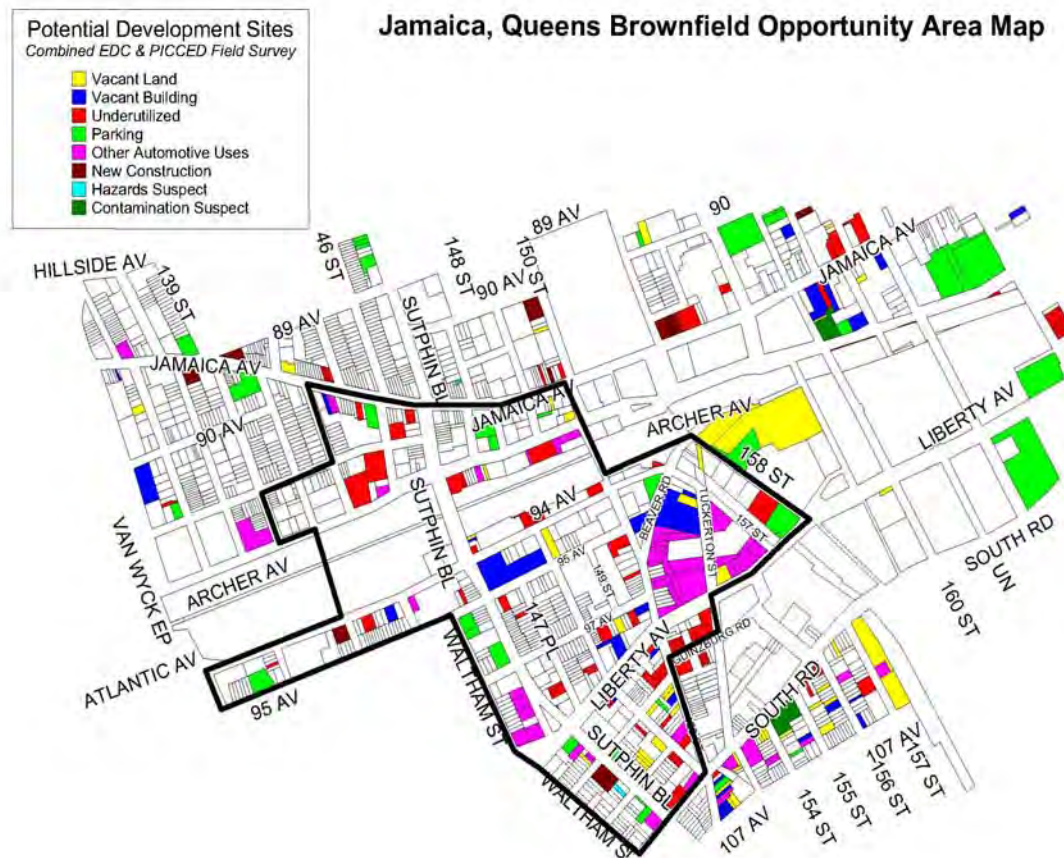
Based on research conducted for the Nomination Study and the results of the City of New York’s environmental assessment for the “Jamaica Plan,” the properties in the Study Area exhibit the following characteristics per 2006 data:

Total Properties	# / % Brownfield Properties	# / % Underutilized Properties	# / % Vacant Properties	# / % Publicly Owned Properties
616	224 / 29.3%	120 / 19.4%	36 / 5.8%	30 / 4.9%

A large majority of the 224 brownfields in the Study Area are in active use. This provides a significant challenge to future redevelopment efforts on these properties. Lots are modestly sized from 2,000 – 65,000 square feet.

The map below illustrates the breakdown of land uses within the Study Area. It is an area largely in transition from a historically industrial to mixed-use (which is called for in the latest visioning exercise by GJDC).

## Land Use Map Showing Underutilized, Vacant or Abandoned Properties in the Jamaica BOA (2006)<sup>1</sup>



Retail and, to a lesser extent, residential and flex manufacturing were found to be market strengths for redevelopment. The market demand study conducted for this Nomination Study by ERA (Economic Research Associates)<sup>2</sup> reported the following conclusions:

- Retail trends suggest that the BOA could support new multi-story main street retail, transit-oriented retail, and large-format retail anchored by national tenants;
- Residential market trends indicate demand for over 7,000 housing units per year; and
- Employment and market trends indicate demand for up to 950,000 square feet of speculative office space and up to 470,000 square feet of speculative industrial/flex space over the next five years.

<sup>1</sup> Underutilized sites are those that fall far short of highest and best use, such as optimal use of allowable FAR (Floor Area Ratio) under zoning constraints. Properties with buildings in sufficient repair for use, but which lie fallow, are considered vacant buildings. Vacant lands are empty lots. Abandoned properties would be those with buildings in utter disrepair and not suitable for use without extensive renovation or clearance. As of 2009, the large site noted as a vacant building on Sutphin Boulevard between 94<sup>th</sup> and 95<sup>th</sup> Avenues has been demolished and the site cleared. It is currently vacant land under the control of a private developer seeking investors for mixed use development of affordable housing, parking and retail. Phase II studies revealed no contamination at the site.

<sup>2</sup> The Market Demand Study was conducted by ERA and submitted in November, 2007. The findings were updated via a Jamaica Market Trends Memorandum submitted by AECOM in December of 2009 (ERA merged with AECOM in November, 2007). The Market Trends Memorandum (2009) is inserted immediately before the initial Market Demand Study (2007) as Appendix B. The updated findings are reflected in the Conclusions and Recommendations of this Executive Summary.



## Summary of Market Demand Findings

Jamaica's primary advantages over other parts of the New York Metropolitan Area are its less intense development pressure, which lowers relative acquisition costs; and its locational advantages in relation to the regional transportation network. These factors position it well for future growth. This development potential is further enhanced by a variety of factors including:

- The presence of several key underutilized properties zoned for industrial use that can be packaged and marketed to developers and/or potential industrial anchor tenants
- Demographic characteristics that demonstrate that Jamaica could easily capture more dollars from consumers if the number and variety of retail opportunities were increased
- Existing development incentive programs including the Empire Zone, overlays the entire BOA, and the Industrial Business Zone program, parts of which are within the Liberty Gateway sub-area of the BOA
- A recent rezoning that has increased the potential development density and profit incentive for residential and commercial developers
- Successful new condominium and apartment residential development projects in downtown Jamaica in recent years that meet a growing demand for greater choice of housing in an area largely dominated by one-family and two-family detached housing. These developments are a five to ten minute walk from the Station Area and include Yorkside Towers (180 rental units, completed 2005); Parsons Windsor apartments, (30 residential units completed in 2009); and the Moda Project (346 units of affordable and market rate rental units and condominiums, plus 50,000 feet of retail and community space, scheduled for completion in the spring of 2010)

## Key Elements of Land Use and Zoning in the BOA Study Area

- As a whole, the Study Area has superior access to transit
- Significant portions of the Study Area saw a substantial increase in density and change of use from industrial to commercial as guided by the rezoning recently approved by the New York City Council
- The Study Area is bordered by four of Jamaica's existing economic development drivers (Jamaica Hospital, Elmhurst Dairy, the Northeast Regional Lab of the US Food and Drug Administration, and York College)
- Properties within the Study Area are generally small and in disparate ownership
- The majority of the key redevelopment sites within the Study Area are in private ownership
- Some lots represent infill opportunities but most require additional land assemblage for larger scale redevelopment
- There are a mix of industrial, auto-related and other uses which often are correlated with environmental conditions on some sites that are likely to complicate redevelopment

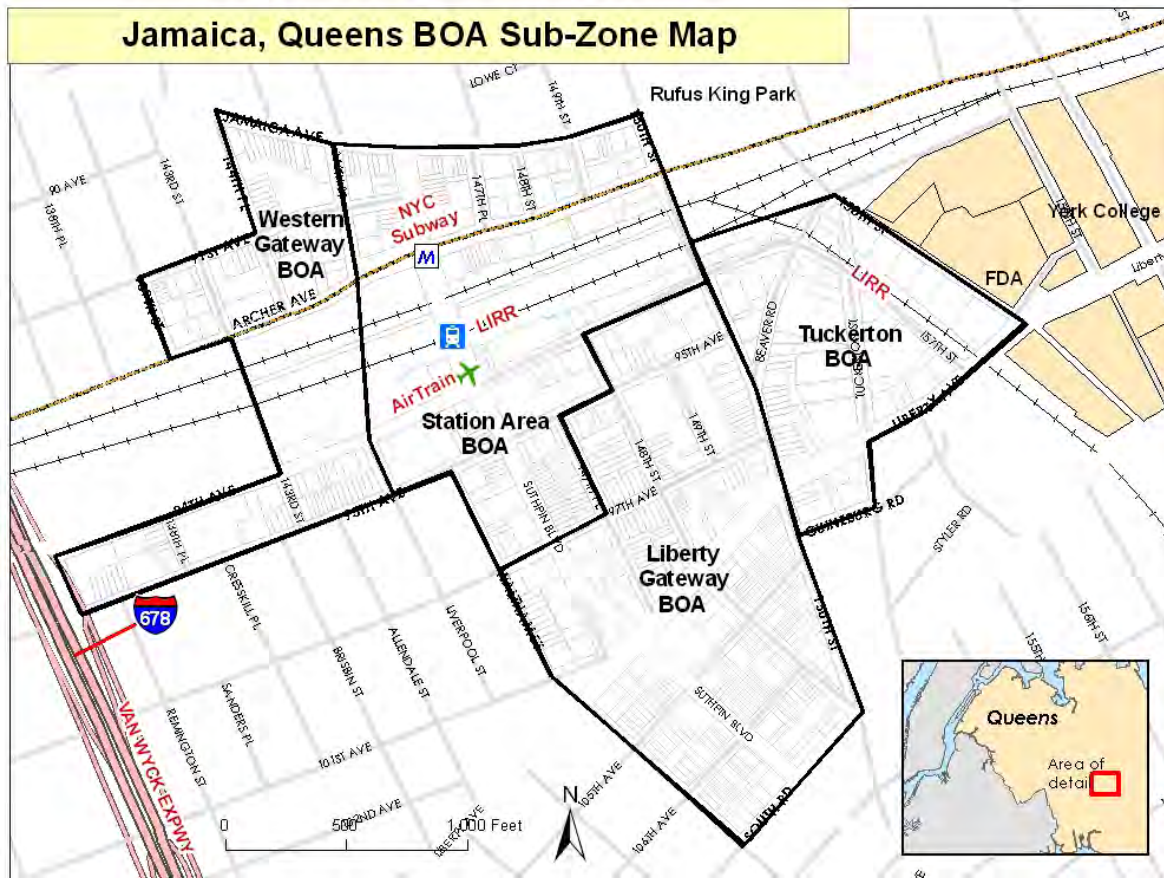
## A Strategic Approach to the Nomination Study

An intensive long-term approach is required to achieve the redevelopment objectives in the Study Area given the location of the brownfield sites, the size of the properties and the large number of property owners. Redevelopment in the Study Area must also accommodate a wide range of uses and functions. This Nomination Study therefore recommends development of strategic sites in **four separate and distinct Brown-field Opportunity Areas**. This will permit redevelopment in staged intervals and the flexibility to target and shift redevelopment efforts based on changing market conditions and opportunities for private investment in the Study Area and to more easily obtain public support.

To better understand and analyze the opportunities in the BOA, the Study Area was divided into **four sub-areas or sub-zones**, each with different land use mixes and each having its own advantages and dis-



advantages based on its relationship to other factors, such as access to transportation, already-planned infrastructure projects, impact of zoning changes as a result of the Department of City Planning's Jamaica Plan, or the location of existing residential development in relation to the sub-sector. Again, this Nomination Study concerns a relatively densely populated, dynamic, urban area, where a ten minute walk can move the observer from a newly built, multi-billion dollar transportation center to old and abandoned industrial sites.



The Station Area, with its existing inter-modal transportation hub; additional infrastructure improvements at various stages of design or implementation; its September 2007 up-zoning from low density industrial use to high density commercial use; and its current level of site assemblage, is currently best-positioned to catalyze development of mixed use, transit oriented development throughout the four sub-areas of the Jamaica BOA. It is therefore discussed below in the greatest detail.

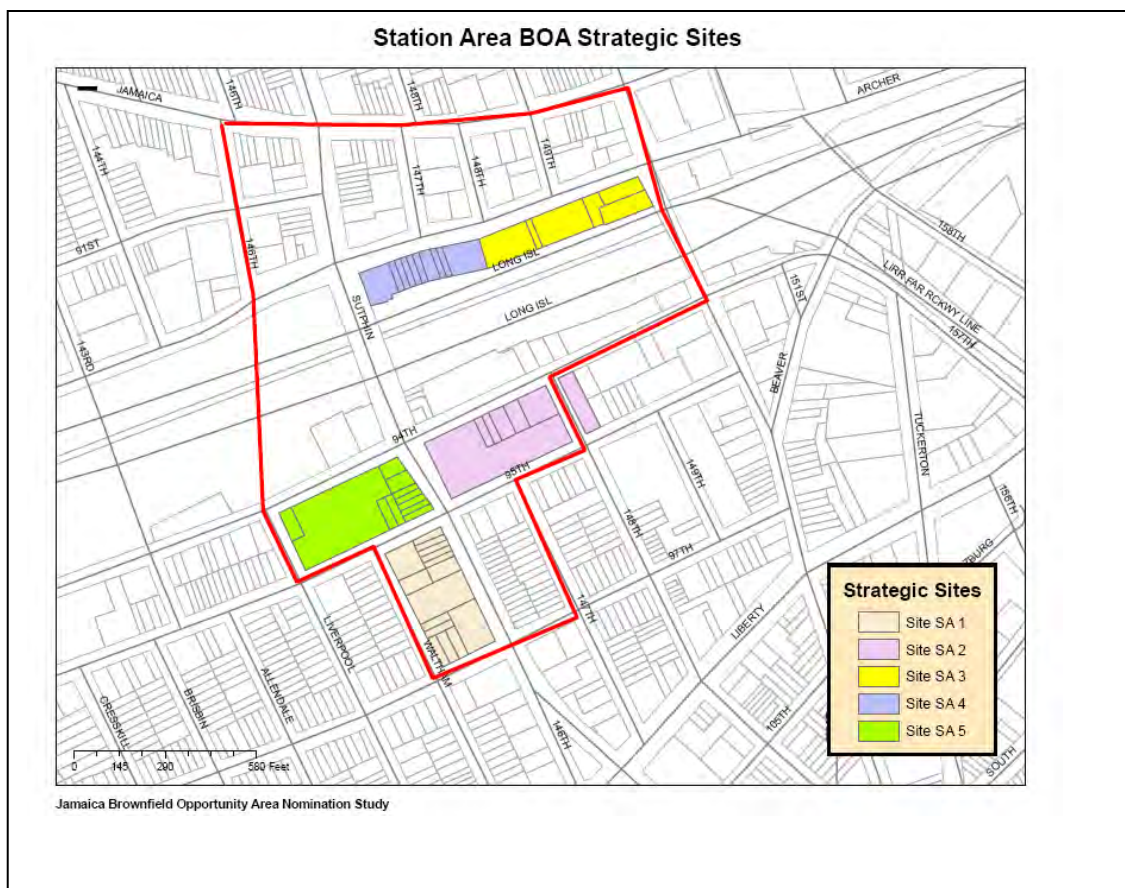
### Snapshot and Existing Conditions in the Station Area Sub-Area

- 40.2 acres; : ~ 11½ blocks
- All Strategic Sites in the Station Area up-zoned from M1-1 to C6 in 2007, allowing commercial redevelopment with floor area ratios of up to 12:1 and maximum building heights of 250 feet
- The area is anchored by mass transit hub comprised of the Jamaica Station of the Long Island Railroad, the primary station of this suburban commuter railroad; the JFK AirTrain Station, linking Jamaica to JFK International Airport, and three lines of the NYC Transit System, the E, J and Z trains

- Infrastructure improvements are in various stages of pre-development or development. Open space (“Signature Park”) has been planned for the portion of Station Area Strategic Site 5 fronting on Sutphin Boulevard; Development for a “Station Plaza” that will ease pedestrian access to the mass transit hub comprised of the LIRR, AirTrain, and three subway lines at Archer Avenue and Sutphin Boulevard have been fully specified, and a project to create new retail spaces on the eastern side of the LIRR underpass at Sutphin Boulevard has been fully specified and funded and work is expected to begin before the end of 2009
- Beautification efforts have begun with new trees and hayracks placed along Sutphin Boulevard in the sub-area
- There remain within the Station Area some active, low-rise uses that are not consistent with higher density, mixed-use, transit-oriented development permitted by the new zoning
- Six sites are assembled for development with private-sector development plans; two are cleared.

On the map below, these are:

- SA (Station Area) Strategic Site 1: assembled by private developer; northern half under contract for hotel development
- SA Site 2: Approximately 70% of total land is assembled; assemblage has been cleared
- SA Site 3: The middle portion has been cleared and is privately held
- SA Site 4: Assembled and controlled by Greater Jamaica Development Corporation
- Two other sites have been assembled; one directly north of SA 2 and parallel to the LIRR; the second immediately east of that site, also parallel to the LIRR
- SA Sites 2, 3, 4 and 5 are within the boundary of a New York City-designated Urban Renewal Area, indicating official City policy in support of redevelopment



## **Redevelopment Overview of the Station Area Sub-Area**

The overall vision of redevelopment in this sub-area is to create an “Airport Village,” taking advantage of the up-zoning of the area to higher density commercial uses in 2007. The Airport Village vision is based on the greener urban planning model of mixed-used, transit-oriented development. Because the mass transportation alternatives available in this one area provide links to both Manhattan and to JFK Airport, the vision includes development of commercial spaces for air industry-related companies, residential development for both JFK workers and those who commute to Manhattan, and retail and hospitality venues that will add 24-hour vitality to the area for both residents and travelers.

Property owners in the Station Area have not fully leveraged the advantages presented by such a key location and its access to a large numbers of commuters. Storefronts have not been upgraded to attract quality retailers and therefore earn higher lease rates. There has been no visible investment by property owners to redevelop sites they control to the higher densities and mixed use now permitted in the area. This is changing, however, with the planning and pre-development of several important development projects including two hotels, possibly on Station Area Sites 3 and 4 and retail and affordable and market-rate housing on SA Site 2. Present market/demand indicators suggest strong long-term demand for higher-density housing in close proximity to the transit hub and both regional and neighborhood retail uses. Efforts continue to fully develop the economic development model of the Station Area as a destination point, not just an inter-modal switching point, the latter being how Downtown Jamaica is currently regarded by too many potential retail operators and developers.

## **Redevelopment Objectives and Activities in the Station Area BOA**

Redevelopment Objective: Capitalize on re-zoning to higher density, commercial use; infrastructure projects in development and pre-development; and the inherent value and efficiency of inter-modal mass transit, to encourage mixed-use, transit-oriented development.

Nascent conditions in the Station Area – private investment for a hotel on one site already committed; additional sites assembled – make it the sub-area with the highest priority, worthy of immediate, additional attention. Activities that would further redevelopment include the following:

- Market Assembled Sites to Private Investors
  - Develop area-wide marketing plan and collateral materials for the Station Area BOA
  - Update existing demand or feasibility studies for overall Station Area development and site-specific redevelopment
  - Identify, understand the needs of, and contact target audiences that are potential sources of equity or tenants for re-development scenarios
  - Develop a marketing program and a series of site-specific collaterals to attract targeted investors and tenants
  - Implement the marketing program
- Create a program for public improvements that directly supports and enables development projects and that build on the infrastructure and beautification projects that are underway or have completed design, specifications, and funding applications.
  - Improve Archer Avenue: Sutphin to 150th Street (along BOA Redevelopment Site 3)
  - Re-design and engineering studies for improved street lighting
  - Re-design and engineering studies for improved sidewalks and curbs

- Landscape design
  - Improve 150th Street Underpass (linking BOA Redevelopment Sites 3 and 4)
  - Cosmetic rehabilitation, parking, lighting
  - Clarification/formation of roles and responsibilities for maintenance: MTA/LIRR, NYC Department of Transportation
  - Create open/green space in Station Area Sub-Area Strategic Site 5 to support hotel development immediately to the south on Station Area Sub-Area Strategic Site 1
- The Program for Public Improvements will catalyze expansion of and enhancement of the Sutphin Boulevard BID (Business Improvement District). The BID currently runs on a north-south axis through the northern half of the Station Area, terminating at 94th Ave.
    - Extend Sutphin Boulevard BID southward along Sutphin Boulevard to Liberty Ave. The extension would bring it down through the entire Station Area and into the northern part of the Liberty Gateway Sub-Area, encouraging BOA-wide development
    - Build area-wide marketing effort around expansion and enhancement of the Sutphin Boulevard BID

Longer-term redevelopment activities in the Station Area would include:

- Add parking to the downtown commercial area as redevelopment progresses
- Develop additional travel-related amenities, such as increased retail outlets that serve a range of income levels and visitor information kiosks
- Expand transit-oriented, mixed use development efforts to other BOA sub-areas within walking distance of the Station Area

### **Snapshot of the Western Gateway Sub-Area**

- 25.6 acres; ~7¼ blocks
- All Strategic Sites in the Western Gateway Sub-Area up-zoned from M1-1 to C4, allowing commercial redevelopment with floor area ratios of up to 4:1 and maximum building heights of up to 125 feet (Strategic Site Map, page 159)
- Western Gateway Strategic Site 3, which is adjacent to the AirTrain, has a number of noxious and inappropriate uses, among them a notorious nightclub, a mattress warehouse, an auto parts store, two auto repair businesses, a live poultry market and a bodega with residential units on the second floor
- Primary vehicular access point linking Station Area to JFK via the Van Wyck Expressway (US 678), which connects Jamaica with JFK Airport
- Specifications completed and funding agreement in place to create a “One-Way Pair” of east-west avenues (94<sup>th</sup> and 95<sup>th</sup> Avenues) running through the Western Gateway to ease traffic flow between the Station Area and US 678 (Van Wyck Expressway), the primary highway serving JFK Airport.
- Proximity to the LIRR Station, the AirTrain Terminal and the future One-Way Pair make it an ideal location for mixed use, transit oriented development for businesses that require immediate access to public transportation or a vehicular transportation network
- Station Plaza infrastructure improvements, which will improve subway entranceways, improve turning radii for vehicles and widen adjacent sidewalks, in addition to the development of open space in the Station Area, will make the Western Gateway an attractive location for residents who would enjoy easy access to mass transit

## **Redevelopment Overview of the Western Gateway Sub-Area**

The overall vision for this sub-area is to leverage its position as the vehicular link between the primary highway serving JFK Airport and the JFK AirTrain Station and downtown Jamaica, as well as its convenient pedestrian access to the Station Area, to encourage private investment on strategic sites in the Western Gateway.

The location of the Western Gateway BOA one block west of the Jamaica Long Island Railroad station, the primary station of the system outside of Manhattan; the JFK AirTrain, a light rail link from the NYC subway system to all JFK passenger terminals; and the creation of the one-way pair of 94<sup>th</sup> and 95<sup>th</sup> Avenues discussed above, make it an ideal location for businesses that require immediate access to either the public rail transportation system or vehicular transportation network. Future redevelopment of the area should leverage these advantages, which would expand the number of choices for live/work environments in Jamaica.

There remains great potential for redevelopment of a character that combines office and residential uses in a manner that better accommodates modern urban design concepts. Future land uses in the area should better reflect the functions and needs of such a transportation-oriented environment and current zoning encourages this.

Redevelopment objectives and activities in the Western Gateway BOA can be found in the body of the Nomination Study beginning on page 159.

## **Snapshot of the Tuckerton Sub-Area**

- 22.5 acres; ~ 4½ blocks
- Entire sub-area re-zoned in 2007 from M1-1 to M1-4, doubling the allowable floor/area ratio for industrial redevelopment from 1:1 to 2:1
- Tuckerton Strategic Sites are severely underutilized and marked by vacant buildings, a high concentration of auto junkyards, and a lack of sidewalks on either side of Tuckerton Street (Strategic Site Map, page 156)
- Tuckerton Strategic Site 1 is composed of two blocks divided by an ill-used, non-through street that could be de-mapped

## **Redevelopment Overview of the Tuckerton Sub-Area**

The Tuckerton sub-area contains the highest concentration of brownfields and industrial uses in the Jamaica BOA Study Area. From the perspective of environmental quality, redevelopment of this area would further the objectives identified by both the Jamaica BOA Advisory Committee and the State of New York through its brownfield redevelopment programs. Junk yards, abandoned vehicles and trash-strewn public streets are commonplace in this area. Pedestrians are discouraged from venturing into Tuckerton when confronted with crumbling sidewalks and a generally dangerous atmosphere.

Tuckerton consists of approximately five tax blocks in the northeast corner of the BOA. It is the most heavily industrialized area in Downtown Jamaica and is adjacent to the US Food & Drug Administration laboratory and York College. These two functions, industrial and academic, are not compatible in their present form, that is, with no buffer between unsightly types of industrial uses and the adjacent intellectual, testing and research uses. Tuckerton's recent rezoning to M1-4, doubling its allowable Floor Area Ratio, combined with these nearby resources, give the Tuckerton BOA unique appeal for industrial/flex uses from a market demand perspective.

There exists strong demand for more retail development in Downtown Jamaica per the market demand study conducted for this report, but while there is community support for small retail, caution was expressed about big-box retail development. At the same time, however, there is a base of existing industrial employment in Tuckerton BOA that is also valued by the community and could be preserved with the proper mix of retail development and industrial uses following assemblage. Whatever industrial uses remain or are added must be operated in a clean manner on properties that are well-maintained and that are compatible with other uses surrounding Tuckerton. There is particular concern about truck traffic, noise and air emissions given the close proximity to York College and the nearby FDA Northeast Regional Laboratory.

The overall vision for development of the Tuckerton sub-area is to de-map Beaver Street, improve infrastructure, especially sidewalks and the streetscape, assemble sites for the development of light industrial, flex, or possibly R&D space linked to the nearby FDA laboratory, and create an environment for retail along the southern edge of the BOA fronting on a through-street, Liberty Avenue.

Redevelopment objectives and activities in the Tuckerton Sub-Area and be found in the body of the Nomination Study beginning on page 156.

### **Snapshot and Existing Conditions of the Liberty Gateway Sub-Area**

- 43.2 acres; 17 blocks
- Smaller average block size than other sub-areas leads to inconsistent “look and feel” of the area
- Only sub-area with significant number of blocks zoned for residential use (3 full blocks and 4 half-blocks); most of these blocks are adjacent to or share blocks zoned for industrial use.
- Strategic Site 1 of the Liberty Gateway sub-area were up-zoned from M1-1 to M1-4 in 2007, doubling industrial redevelopment from a 1:1 to a 2:1 Floor Area Ratio (Strategic Site Map, p. 162)
- An important local through-street and commercial corridor, Sutphin Boulevard, runs through the sub-area north-south and acts as a gateway for vehicular traffic moving from the heavily populated south toward downtown Jamaica in general and the Station Area in particular. The half-blocks facing Sutphin Boulevard within Strategic Site 2 were uniformly re-zoned to medium density residential with a commercial overlay
- The small lot designated as Strategic Site 3 was up-zoned from M1-1 to C6, extending that same zoning use from Strategic Site 2 of the Station Area.
- Liberty Gateway also has an east-west commercial corridor, Liberty Avenue, within its boundaries.

### **Redevelopment Overview of the Liberty Gateway Sub-Area**

The location advantages afforded to properties along the corridors running through Liberty Gateway are a primary market demand consideration. The close proximity to the transportation hub is also an important element to incorporate into future development along the corridors, particularly when contemplating attracting or retaining manufacturing or commercial employment in the northeast corner of the Sub-Area. Neighborhood retail and lower-rise housing will attract the most demand in the southern portion of Liberty Gateway, while industrial and commercial uses, including larger-scale retail, would be supported further north

The design character of the transportation infrastructure in the area is one of the most notable features in the Liberty Gateway. There is substantial need for design improvements to enhance the pedestrian experience along the corridors and decrease the dominance of the automobile through the urban landscape. Unlike other portions of the BOA Study Area where transportation function presents immense challenges



to design, the Liberty Gateway BOA's existing infrastructure can be easily modified to accommodate modern urban design concepts with the proper amount of investment.

The overall vision for Liberty Gateway is to see upgraded retail choices and housing stock. The goal would be to make it a more vibrant environment for residents and to provide a more welcoming and reassuring impression for visitors, workers and shoppers, especially those approaching Jamaica from the resident-dense areas south of the downtown.

Liberty Gateway has not yet been subject to significant pre-development work or been a focus for public resources. It therefore presents only longer term opportunities for redevelopment to be explored at a later date.

## **Conclusions and Recommendations**

Brownfields in the Jamaica BOAs are, for the most part, privately owned and zoned for private use - commercial, residential or industrial. As is typical of an urban environment, there tend to be multiple private property owners within a given block. Site assembly for substantial redevelopment projects is a challenge under these conditions.

Key findings of the 2007 market demand study for redevelopment options conducted for this Nomination include the following:

### **Retail Development**

- Retail trends suggest that the BOA could support new multi-story main street retail, transit-oriented retail, and large-format ("big box") national tenants, in addition to clustered retail along major pedestrian and vehicular corridors.

### **Residential Development**

- Analysis indicated demand for roughly 7,300 units per year, including both new and existing product in development. In light of various changes in the area – rezoning, infrastructure improvements, and new development – CD 12 could capture a greater share of housing demand in the future.

### **Commercial Development**

- Average gross demand for office space in the Jamaica Office Submarket over the last five years suggests that demand for 1.7 million square feet of office space could be realized over the next five years.

### **Industrial/Flex Development**

- Average gross absorption of industrial/flex space in Jamaica suggests that demand for 3.4 million square feet of industrial/flex space could be realized over the next five years.
- Zoning changes throughout New York City have the potential to increase demand for industrial development in Jamaica, as residential development in the urban core pushes industrial uses out.

Much has changed in the development landscape over the last twelve to eighteen months. In response, market demand data was updated in December of 2009. (See Appendix B, Updated Market Demand Study (2009). Key findings of this update were:

- The retail market remained stable in 2007 and 2008. In 2009, the retail market exhibited moderate increases in vacancy rates, declining lease rates, and negative absorption.
- The residential market has experienced a steep decline in sales, increase in foreclosures, and depreciation in pricing. However, recent residential sales data indicate that while prices continue to fall, sales volumes are stabilizing. Rental rates under the New Housing Opportunities Program are up 3% to 6%



from 2007 levels, reflecting an up-tick in Area Median Income; however overall vacancy rates for all residential units, both owner-occupied and rental units in Queens Community District 12 (Jamaica, South Jamaica, and the neighborhoods immediately to the east and south, St. Albans, Hollis, and North Springfield Gardens), were at 8.3% in 2009, compared to 6.5% in CD 12 in 2000 and 5.8% for Queens County overall in 2009.

- The office market has shown stability, with declining vacancy rates and positive net absorption. However, lease rates have declined and recent construction activity has been limited.
- The industrial/flex market has exhibited stability, with declining vacancy rates and positive net absorption. Lease rates have fallen mildly and there has been very little new construction in the market.

The update stated that “(Conclusions) made in the 2007 Jamaica BOA Market Study are generally valid, though the time horizon for development in Jamaica is likely to be considerably longer than previously anticipated.” These 2007 conclusions were:

- Retail trends suggest that the BOA could support new multi-story main street retail, transit-oriented retail, and large-format retail anchored by national tenants.
- Residential market trends indicate demand for over 7,000 housing units per year; and
- Employment and market trends indicate demand for between 950,000 square feet of speculative office space and between 470,000 square feet of speculative industrial/flex space over the next five years.

And although the residential sector, which plays the least critical role on Station Area redevelopment, has been most seriously impacted by current economic conditions, the 2009 update states, “The relatively stable vacancy rates in the office, retail and industrial/flex sector indicate the strength of these markets. It is expected that Jamaica will thrive as the New York City economy rebounds and will be well positioned for market absorption across all sectors.”

Infrastructure and development projects that were on the drawing board prior to 2007-08 continue to move forward or are in construction. These include the redevelopment and revitalization of the Long Island Railroad underpass at Sutphin Boulevard and the development of 50,000 feet of new retail space and over 300 units of housing in the Moda Project mentioned above, and the completion of final design for a limited service hotel at the southern end of the Station Area. However, other Station Area projects that were not as far advanced have been slowed, among them a mixed use office and retail project and a full service hotel project.

That being said, the re-zoning of Jamaica and the ever-increasing recognition of the importance of mass transit and mix-use, transit oriented development, are powerful, long-term drivers for brownfield development in the BOA. Recent private investments, such as newly constructed retail and office space on Jamaica Avenue; new market rate and affordable, high density housing in the downtown; and the planned improvement of vehicular and pedestrian traffic flow in the Station Area, all bode well as table-setters for BOA revitalization as the economy and the real estate market return to a more balanced position.

Up-zoning of the Station Area to high density commercial use allows for multi-story commercial development and makes such projects more efficient and attractive to the private sector as the economic climate improves.

BAE (Bay Area Economics) conducted a highest and best use study of Station Area Strategic Site 2 in June of 2009. Using the traditional definition of highest and best use as one that is legally allowable, physically possible, financially feasible, and maximally productive, they provided the detailed transactional data in the table below.

	<b>Alternative A: Retail</b>	<b>Alternative B: Mixed Use Office/Retail</b>	<b>Alternative C: Mixed Use Residential/Retail</b>
<b>Zoning/FAR</b>	C6-4/12	C6-4/12	C6-4/12
<b>Program Mix</b>			
Residential as % of Total Sq. Ft.	0%	0%	63%
Office as % of Total Sq. Ft.	0%	58%	0%
Retail as % of Total Sq. Ft.	100%	34%	28%
Total Built Square Feet	180,000	530,500	646,955
<b>Total Residual Land Value</b>	<b>\$17,671,405</b>	<b>\$13,081,044</b>	<b>\$6,736,108</b>
<b>Residual Land Value / Sq. Ft. of Land</b>	<b>\$294.52</b>	<b>\$218.02</b>	<b>\$112.27</b>
<b>Permanent Jobs Generated (a)</b>	<b>360</b>	<b>1,600</b>	<b>360</b>

The currently depressed rental housing market noted in the updated market demand study is reflected here in a low revenue stream for market-rate housing. Retail and Mixed-Use Office/Retail show substantial residual land value – “the value ‘to the land’ after development and lease-up/stabilization of the project.” Purely from a financial perspective, Retail showed a superior return, primarily due to the lower development costs of retail space. Mixed-Use Office/Retail, while yielding a residual land value nearly double that of residential, is less economically productive to the land owner than Retail; however it would be more job-intensive, generating approximately 1,600 new jobs at full occupancy. So while Mixed Use Office/Retail represents the most desirable outcome from an economic development perspective, its low residual land value indicates that some form of public support may be necessary to attract a private development sponsor.

Clearly, redevelopment of brownfields in Jamaica will require a cooperative approach that includes the private sector, government and the non-profit sectors, working with the community, to resolve issues where public concerns and private interests must both be addressed.

There is a need to advocate for responsible, community-sensitive development and, at the same time, market the current value and potential return on investment to obtain the private commitments necessary for the redevelopment of Jamaica’s brownfields.

Creative approaches to assemblage and uses, aggressive marketing and investments in infrastructure indicating a public commitment to redevelopment, along with the tools provided through avenues such as the New York State BOA Program, the Brownfield Cleanup Program, the newly created New York City Office of Environmental Remediation, the federal Environmental Protection Agency, and other state, city and federal agencies and programs, will all be required to redevelop brownfields in the Jamaica BOAs.

The Station Area has by far the greatest number of existing qualities among the four BOA sub-zones to attract the investments necessary for brownfield development. It should receive priority attention by aggressively marketing strategic sites for development, implementing the infrastructure improvements that will attract private investment, and creating public-private partnerships to reduce the cost of financing and provide incentives for investors.

## SECTION 1

### PROJECT DESCRIPTION AND BOUNDARY

## SECTION 1: PROJECT DESCRIPTION AND BOUNDARY

### 1.1 Lead Project Sponsors

Greater Jamaica Development Corporation (GJDC) is the sponsoring, community-based organization for this BOA Nomination Study. GJDC has over 40 years of experience in redevelopment and revitalization and creating economic opportunity in Downtown Jamaica and environs. This depth and breadth of experience has created a web of relationships with the City of New York and an array of City agencies and departments.

GJDC is a contractor for the New York City Department of Small Business Services (SBS). We provide community-building services under two City-funded programs – the Industrial Business Solutions Provider program and the Avenue NYC Program. The former program focuses on maintaining the industrial base in the Jamaica Industrial Business Zone; the latter focuses on quality of life and on revitalizing commercial and retail activity in the Downtown. Both programs require regular reports on progress and a formal vouchering process that includes submission of GJDC staff's timesheets to SBS.

Our linkage to the City for the BOA program is multi-faceted. We have well-established working ties with the Department of City Planning as part of our long-term interest in, and mission to support, responsible development. Prior to submitting our proposal for the Jamaica BOA Nomination Study, we consulted with Queens City Planning on the boundaries for the proposed BOA, as well as the timing of our submission for funding. At their request, we delayed our submission to prevent any confusion with an ongoing City Planning effort to re-zone 386 blocks in Jamaica, 30 of which were in the 40-block proposed BOA. That City Planning re-zoning effort, to which we contributed in an advisory capacity, was finalized on September 10, 2007. The deputy director of Queens City Planning was a member of the Jamaica BOA Advisory Committee.

Another key city agency for both GJDC's work and BOA planning is the New York City Economic Development Corporation (EDC), which is responsible for promoting economic growth city-wide through real estate development programs and business incentives. Like the Department of City Planning, we also consulted with EDC regarding the proposed boundaries for the Jamaica BOA. GJDC manages a number of infrastructure and community development projects supported at the City, State and Federal levels and partners with EDC in funding agreements to move the projects forward. EDC's Senior Project Manager for Queens was a member of the Jamaica BOA Advisory Committee.

We gained the city's formal imprimatur of our BOA project at an early stage. The Mayor's Office of Environmental Coordination (now the NYC Office of Environmental Remediation, [OER]) provided a letter of support which was attached to the BOA proposal we submitted to the New York State Departments of State and Environmental Conservation. This relationship with OER continues through one-to-one contacts; meetings and presentations on new city programs in support of brownfield redevelopment; joint presentations to other, less advanced BOA program participants; and consultation on specific brownfield issues affecting businesses in our community. The Senior Environmental Planner for OER was also a member of the Jamaica BOA Advisory Committee.

## 1.2 Project Overview and Description

### Characteristics of the Study Area

The BOA Study Area is located largely to the south of the LIRR in Downtown Jamaica, with the exception of a portion that runs along Archer Avenue and Jamaica Avenue north of the tracks. The Study Area is 0.2 square miles (132 acres) in size, covering 40 blocks and containing 616 properties. The Study Area contains automotive and heavy industrial uses, as well as stable residential areas and a substantial amount of transportation-oriented property.

<b>Jamaica BOA Study Area Properties</b>		
<b>Uses and Characteristics</b>		
	<u>Number of Properties</u>	<u>Percentage</u>
<b><i>Total</i></b>	616	100.0%
<b><i>Vacant</i></b>	37	6.0%
<b><i>Retail</i></b>	32	5.2%
<b><i>Residential</i></b>	213	34.6%
<b><i>Industrial</i></b>	69	11.2%
<b><i>Junk Yard</i></b>	18	2.9%
<b><i>Mixed Use</i></b>	79	12.8%
<b><i>Automotive</i></b>	63	10.2%
<b><i>Other</i></b>	105	17.0%

*Source: 2006 GJDC Property Inventory*

**Table 1 - BOA Uses and Characteristics**

Although 34.6 percent of the properties in the BOA are residential in use, less than 18% of the land is zoned residential. Nearly 50% of the land in the BOA is zoned for industrial use and the remaining third is zoned for commercial use.

### **Figure 1 - Community Context Map**

Relation of the BOA to the Municipality, County and Region (note: the Jamaica BOA is in the center of Downtown Jamaica shown on the map)

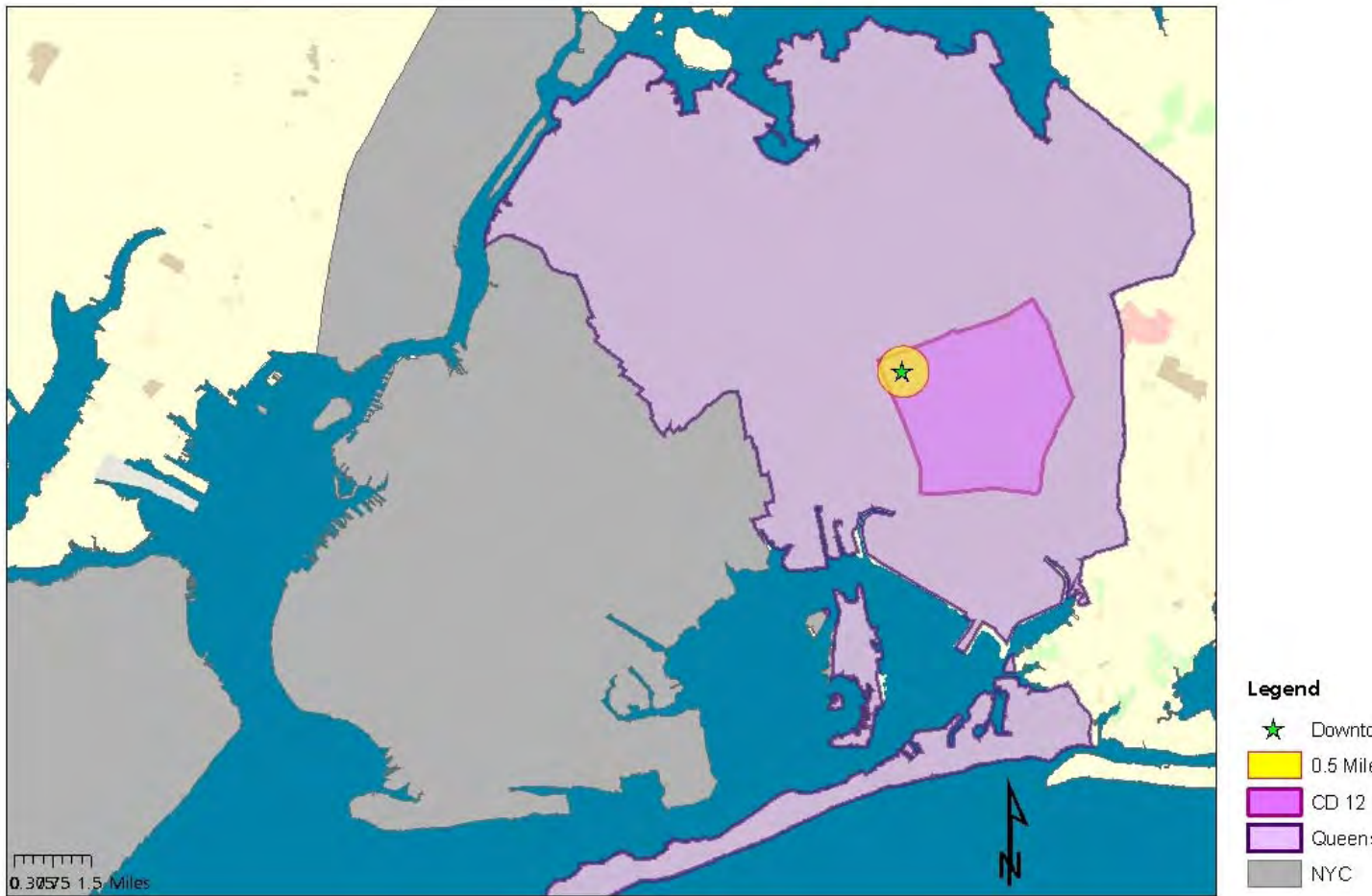
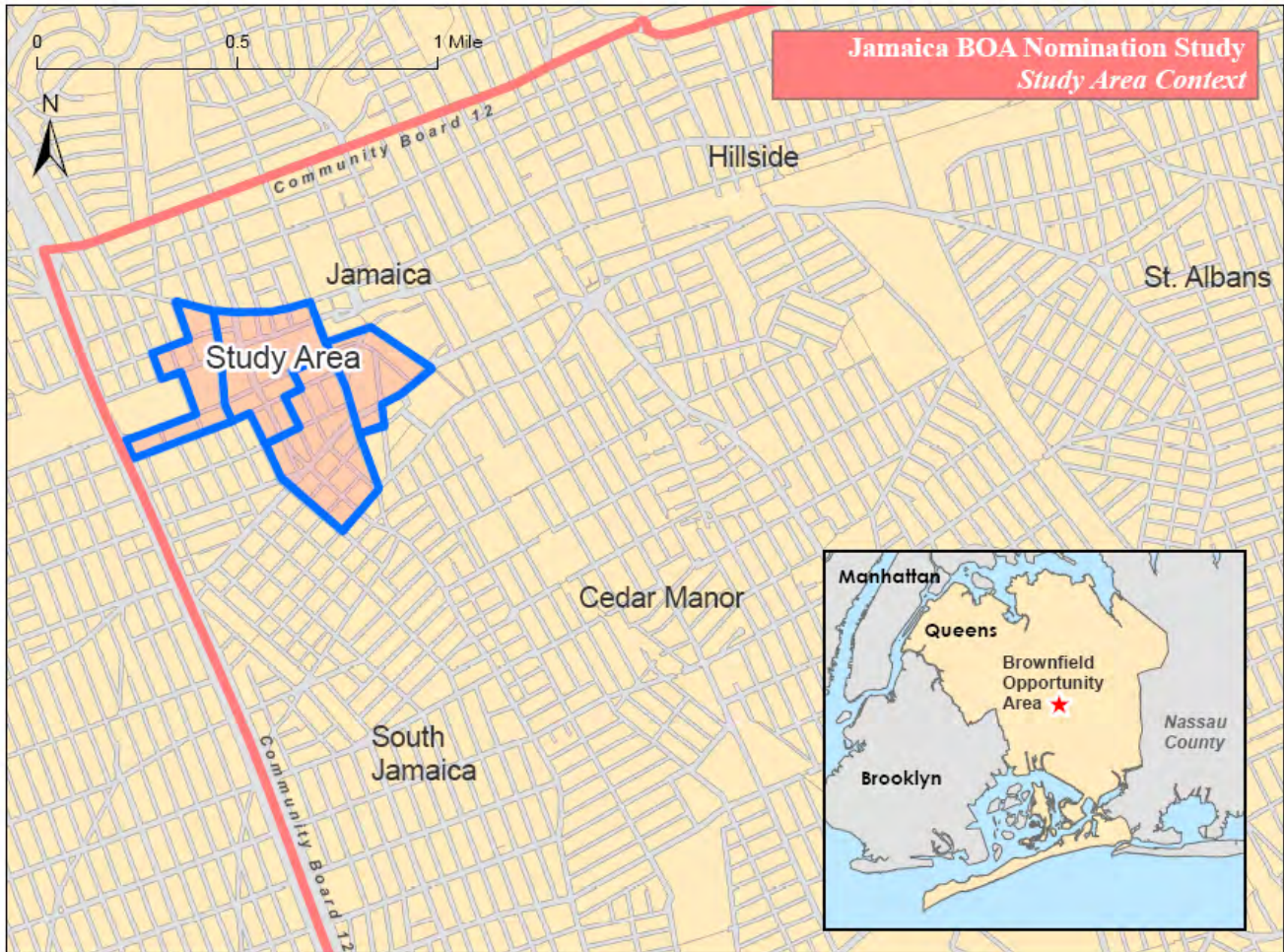


Figure 2 - Study Area Context Map  
Relation of the BOA to the Entire Municipality





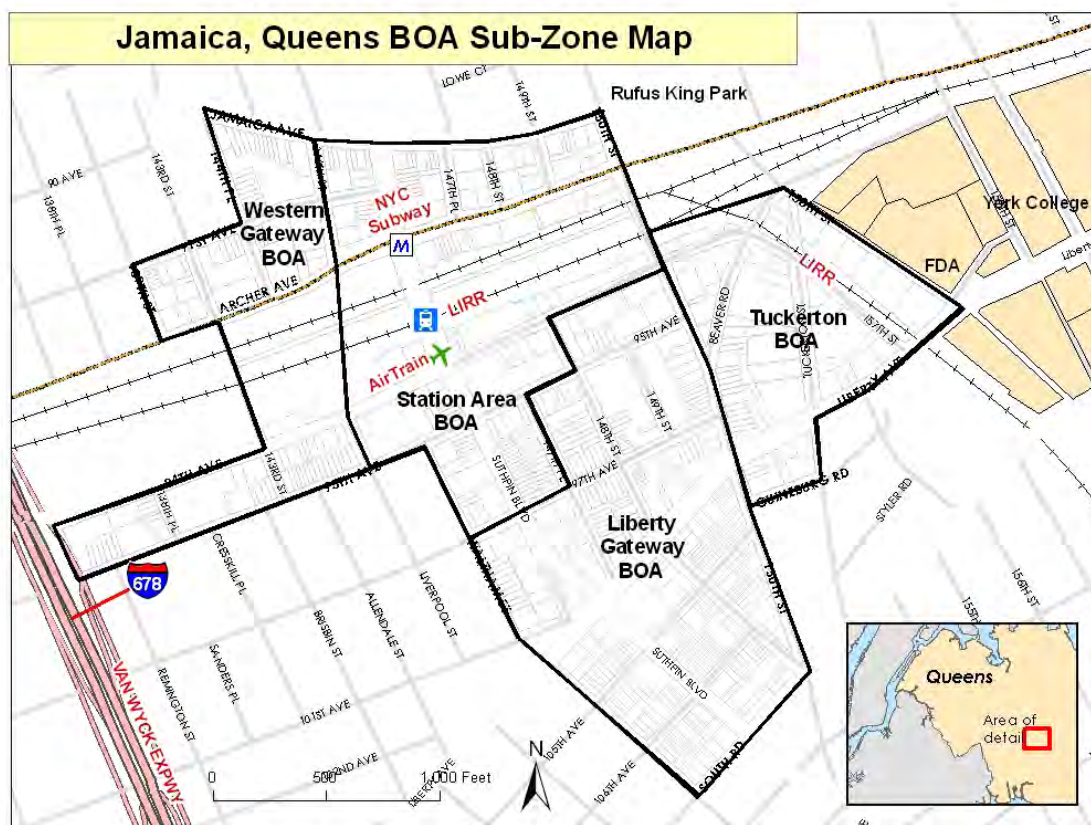
Due to the types of uses prevalent in the BOA Study Area, the majority of the non-residential properties are regarded as brownfields. Based on research conducted for the Nomination Study and the results of the City of New York’s environmental assessment process for the “Jamaica Plan,” a total of 224 of the 616 properties in the Study Area are brownfields. These 224 properties total 38.7 acres in size. This represents 29.3% of the land within the BOA Study Area.

A 2006 property survey concluded that 36 properties (5.8%) in the BOA Study Area are vacant. While many of these vacant properties are brownfields, a large majority of the total of 224 brownfields in the Study Area are in active use. This provides a significant challenge to future redevelopment efforts on these properties.

Redevelopment and quality-of-life enhancement opportunities exist throughout the 40-block Study Area as will be shown below.

The Study Area was initially divided into four sub-areas or sub-zones, each with different land use mixes and each having its own advantages and disadvantages based on its relationship to other factors, such as access to transportation, already-planned infrastructure projects, or the location of existing residential development in relation to the sub-area. These sub-areas were the cornerstone for the strategic approach employed in this Nomination Study. Again, the Nomination Study concerns a relatively densely populated, dynamic, urban area, where a ten minute walk can move the observer from a newly built, multi-billion dollar transportation center to old and abandoned industrial sites.

**Figure 3 - Sub-Zone Map**



## Opportunities

### Station Area Sub-Zone

#### *Improve Urban Design and Streetwalls*

Several projects that are underway or planned for the Station Area will substantially enhance the street-scape surrounding the transportation hub. The Station Plaza project, which will reconfigure the intersection of Sutphin Boulevard and Archer Avenue and create two public plazas, will improve the pedestrian experience near the LIRR. The “Shops at Station Plaza” will transform a dark and dreary underpass of the LIRR into a walkable street with shops and special lighting. While these projects will have a positive impact in this area, much is still to be done. The urban design standards that are displayed in these projects can be employed in the redevelopment of other properties in the Station Area BOA.

#### *Employ Beautification Techniques*

Where Archer Avenue and Sutphin Boulevard branch out from the AirTrain/LIRR hub, the physical appearance of the street erodes quickly. There is a lack of street trees, benches and pedestrian considerations as Sutphin Boulevard turns south and Archer Avenue turns east. Archer Avenue, in particular, is very wide and has uninterrupted expanses of concrete and asphalt. Transportation beautification techniques can be utilized to improve the appearance of these important corridors.

#### *Assemble Redevelopment Sites and Market Sites to Private Investors*

Greater Jamaica Development Corporation has partnered with the City of New York and other stakeholders to pursue redevelopment of several key properties in the Station Area. Some sites have already been assembled. Further site assembly is necessary to ensure the long-term success of the revitalization efforts here. In addition, an aggressive marketing campaign accenting Jamaica’s strengths and assets, as well as the capacity in the neighborhood for developing key economic development partnerships, will accelerate redevelopment.

#### *Address Parking Concerns for Downtown Commercial Area*

There is inadequate parking in Downtown Jamaica to accommodate the large number of people either passing through the area on a daily basis or shopping there. While metered on-street parking is provided in most parts of the Downtown and the City has launched an aggressive effort to reduce parking violations in the area, there is a need for additional off-street spaces. Greater Jamaica Development Corporation, through Jamaica First Parking, has been the driving force for addressing such needs in the past. This effort should continue with the provision of additional off-street spaces, in garages or parking lots, where sites can be assembled and where such development is appropriate given the character of surrounding uses.

#### *Potential Redevelopment Strategies*

#### *Develop Additional Travel-related Amenities*

The opening of AirTrain, added to the existing, heavily used subway lines and LIRR in the Station Area, present a unique opportunity for redevelopment. Existing redevelopment efforts in the Station Area have recognized this and, therefore, projects such as hotels and restaurants have been pursued. This effort to

create a hub of services for travelers to and from Kennedy Airport and other parts of the New York metropolitan area will continue and the focus sharpen to expand the number and variety of service-related development and businesses that are pursued.

#### *Expand Transit-Oriented Development Efforts*

The zoning and land use changes instituted by the City of New York in 2007 around the transit hub at Sutphin Boulevard, Archer Avenue and 94<sup>th</sup> Avenue have re-designated much of the land from industrial to commercial use and increased the maximum floor area ratio for development from 1:1 to as much as 12:1, significantly increasing the valuations of highest and best use for these properties. A more appropriate pattern of higher-density construction based on mixed use, transit oriented development will emerge which will serve the evolving demand for more modern residential, retail and commercial space.

#### **Western Gateway Sub-Zone**

##### *Assist Existing Businesses to Retain Employment*

Several businesses important to the local economic base operate within the Western Gateway BOA and efforts should be made to ensure that these businesses continue to thrive in the neighborhood. Such businesses include Gold Coin Laundry Equipment and the Beck/Arnley warehouse. Various economic development tools are available to assist these businesses and these tools should be utilized. Businesses throughout Downtown Jamaica need this kind of support but businesses in the Western Gateway BOA are more likely to face development pressures due to its close proximity to the Station Area.

##### *Enhance the Pedestrian Experience*

The multi-track, elevated LIRR train tracks that stop at the Jamaica LIRR and JFK AirTrain stations from the west run directly through the Western Gateway BOA. The result is a dreary pedestrian experience along both 94<sup>th</sup> Avenue adjacent to the AirTrain and its associated parking lots and Archer Avenue. To break this up on the ground, more trees should be planted, benches provided and the 143<sup>rd</sup> Street underpass redesigned.

##### *Lessen Visual Impact of Transportation Infrastructure*

The south side of Archer Avenue in this area is essentially a 20-foot tall wall of concrete on top of which the LIRR runs. The wall is drab and lifeless with no decoration or color. The elevated AirTrain tracks that run along 94<sup>th</sup> Avenue have the same effect, though the impact is much lessened by the fact that the supports for the tracks are spaced columns, not a solid wall. The appropriate transportation agencies, MTA and the Port Authority respectively, should partner with local entities to study ways in which this situation can be improved to lessen the stark visual impact of this transportation infrastructure.

##### *Potential Redevelopment Strategies*

##### *Live-Work Redevelopment on Archer Avenue*

While higher-density condominium and apartment construction has occurred over the past five years in Downtown Jamaica, housing choices in the area remain relatively limited. Redevelopment in the areas closest to the transit hub should introduce a live-work option to contrast with the single-family and multi-family detached style that still dominates the neighborhood. The style for this construction will aim at appealing to younger professionals who can also bring additional economic power to the area.

### *Attract Transportation-related Businesses to the future Atlantic Avenue Extension*

The Atlantic Avenue Extension project and the One-Way Pair, which will bring Atlantic Avenue under the Van Wyck Expressway and create two one-way streets at 94<sup>th</sup> and 95<sup>th</sup> Avenues, will significantly improve the flow of vehicular traffic through the Western Gateway BOA. The substantial public investment in this project will be leveraged by focusing redevelopment in the area, particularly the southern portion of the BOA, on uses that have a need for quick and easy access to the regional highway network. Site assembly and marketing will be a component of these efforts.

### **Tuckerton Sub-Zone**

#### *Enhance Environmental Quality*

The Tuckerton Sub-Area holds the highest concentration of brownfields in the Study Area. Aggregately, a redevelopment project in the Tuckerton BOA, with its accompanying remediation, would mark a substantial improvement of environmental quality in the community. The uses in this area are notorious for their penchant for contaminating the soil and this tendency is further reflected in the Executive Summary of the Environmental Assessment in Appendix D.

#### *Improve Visual Appeal*

The Tuckerton BOA is an industrial area and, as such, property owners are apt to place less emphasis on aesthetics than utility. Unfortunately, this has been taken to the extreme in this area with haphazard sheet metal fencing, barbed wire or, in many cases, junk cars and piles of debris not shielded by fencing. An interagency task force that included enforcement of performance standards by the Department of Buildings brought some improvement of this situation in 2007, but the problems tend to reappear and largely remain.

Pedestrians avoid this area because, among other reasons, the visual signals point to danger. Most of the vehicular traffic coming through the area does so on Liberty Avenue and several junk yards and empty lots front on Liberty. Even if the visual quality along Liberty Avenue itself could be improved, the general area is highly visible to passengers on the elevated LIRR, thus harming the overall image of Jamaica to non-residents.

#### *Redevelopment Strategies*

##### *Mall-type Retail and/or Light Industrial Redevelopment*

Retail uses are allowed under the M1-4 zoning classification that covers the area. Also, the market/demand analysis identified a substantial amount of retail spending that could be captured in Downtown Jamaica but is presently exiting the community. More specifically, given that there is a cluster of manufacturers in the area that produce home improvement and construction-related products, a potential was identified for development of a home-improvement themed retail area. Only one big-box home improvement store is operating in Downtown Jamaica presently.

Further big box retail development in Downtown Jamaica lacks the support of residents. Traffic is already regarded as problematic in the Tuckerton area and this type of development is perceived as a contributing factor. Such development has also traditionally lacked appropriate urban design considerations in its construction in Jamaica. Finally, the jobs created by such development are not those that Jamaica residents generally value, as they are typically lower-paying and less stable than other more traditional kinds of economic development.

### *Light Industrial Use*

Overall, light industrial redevelopment was supported at a community-based design charette. There was support for retail in conjunction with this use, but only along the south side of the Tuckerton BOA, which fronts on a four-lane local through-street.

These considerations and the recognition that there are some viable businesses that are contributing to the economic and social fabric of the community in the Tuckerton BOA caused the Project Team to modify its redevelopment recommendation to focus on future industrial development. The City of New York is presently attempting to encourage industrial development in certain areas with its Industrial Business Zone program. Also, industrial and manufacturing employment pays higher wages and has a more wide-spread multiplier effect in the community than do other types of employment.

### *High-Technology Industrial Development or Incubator*

The Tuckerton BOA is situated directly adjacent to York College and the US Food and Drug Administration Regional Laboratory. Strategic couplings of federally-funded laboratories and institutes of higher education can be the foundation for the creation of research and development “centers of excellence” which, with private sector participation generate substantial economic benefits.

An opportunity exists in Jamaica to tap these resources in a manner that creates a sustained supply of higher-wage jobs and a healthy entrepreneurial climate. Several entities, most recently as part of the Vision for Downtown Jamaica, have discussed the economic opportunities present given this combination of institutions. And while the redevelopment recommended for the Tuckerton BOA does not specifically call for institutional uses, spaces developed for light industry could be modified and evolve to accommodate other uses that grow from the innovative partnerships formed by these institutions.

## **Liberty Gateway Sub-Zone**

### *Improve Pedestrian Experience*

The Liberty Gateway BOA is characterized by an automobile-oriented development pattern and infrastructure design. The proliferation of parking lots combined with large numbers of curb cuts makes pedestrians feel uncomfortable and unwelcome. This is perhaps best exemplified at the corner of Archer Avenue and Sutphin Boulevard, where a gas station sits in a median. Redevelopment at this intersection and a redesign of transportation infrastructure are recommended.

### *Reduction of Land Use Conflict*

The Liberty Gateway BOA has a combination of both residential and industrial uses and these uses are in close proximity. This results in heavy truck traffic on predominantly residential streets, large amounts of dust and noise and a generally negative impact on quality-of-life for residents. The demapping of 149<sup>th</sup> Street is contemplated as part of the redevelopment proposed for the northeast portion of the Liberty Gateway BOA.

### *Redevelop Underutilized Properties*

Low-rise one-story commercial and industrial buildings are common within the Liberty Gateway BOA. With the implementation of the Jamaica Plan by the City of New York many of these properties have

been up-zoned for their existing use, particularly with manufacturing uses with the change from M1-1 to M1-4. Redevelopment at these locations, particularly of buildings that front on corridors such as Liberty Avenue and 150<sup>th</sup> Street, should take advantage of the increased density allowed by the rezoning. This will improve the streetwalls in the area, further enhancing the pedestrian experience.

### *Increase Recreational Opportunities*

Downtown Jamaica has little in terms of public recreation opportunities beyond the 11-acre King Park, fronting on Jamaica Avenue north of the BOA. Two factors make the Liberty Gateway BOA the preferred location for new recreational opportunities: large number of underutilized properties and stable residential blocks. The Liberty Gateway BOA has residents that would be able to take advantage of more public recreation opportunities and the kinds of properties that could be redeveloped for such purposes.

### *Potential Redevelopment Strategies*

Redevelopment strategies identified for the Liberty Gateway BOA incorporate the opportunities identified, particularly in enhancing quality-of-life elements for residents. Redevelopment is targeted to properties and corridors where such projects will have the greatest impact. Stable residential areas within the Liberty Gateway BOA will remain under these strategies.

### *Mixed Use Along Liberty Avenue*

Small shops were common along Liberty Avenue many decades ago before the proliferation of auto-oriented uses that line the corridor today. Given the ample public transportation infrastructure in the area and the new emphasis on transit-oriented development (TOD) an opportunity exists to bring more mixed uses back into the area. New mixed use development will be examined in the context of the present and future real estate market to determine the level of demand for the style of housing contemplated.

### *Strengthen Manufacturing Base*

Despite leakage of manufacturing employment to other parts of the New York metropolitan area and other corners of the globe Jamaica continues to maintain a significant industrial base. The close proximity of both an international airport and the regional interstate network has made Jamaica an attractive location for wholesale and warehouse uses as well. In addition to quality-of-life enhancements, redevelopment in the industrial areas of the Liberty Gateway BOA will attempt to strengthen this manufacturing base by supporting the expansion of some of the existing businesses while emphasizing the need for cleaner and greener industrial uses.

### **1.3 Community Vision and Goals and Objectives**

The primary impetus for launching the Jamaica BOA is the large number of brownfields in the community. The community has a long-held and frequently expressed sensitivity to contamination. Over a decade ago, it fought for a change in its source of drinking water from local groundwater, which had become tainted, to the upstate reservoir-fed water used by virtually all other communities in the City. It also has been sensitized by the existence of a New York State superfund site within the downtown area and a disproportionate number of waste transfer stations in the community. There is also a strong desire in Jamaica, an economically disadvantaged area, for quality jobs and economic development that brings opportunities for residents while, at the same time, maintaining the existing character of the residential neighborhoods.

Throughout the formation of the Study, GJDC coordinated a series of public outreach activities, the details of which are presented in Section 2. Among these were a series of meetings of the Jamaica BOA Advisory Committee, formed as an integral part of this Nomination Study. The following Vision Statement and Goals and Objectives identified as the guiding principles for the Study at a meeting of the Advisory Committee on June 8, 2006.

#### **Jamaica Community BOA Vision Statement**

To create through the BOA process the opportunity for revitalization, rehabilitation and community oriented redevelopment of underutilized, vacant, blighted and environmentally impaired area of Jamaica.

#### **Jamaica Community BOA Goals and Objectives**

##### **Improve Quality of Life for Residents**

The BOA effort seeks as its ultimate long-term goal the improvement in quality of life for residents of Jamaica. Existing land uses in the Study Area and the associated environmental impacts are generally perceived as negatively impacting quality of life in the community. Redevelopment associated with the BOA initiative will bring more environmentally friendly and visually benign uses that will have the additional benefit of making the area more attractive to work, play and live in, increasing economic activity. This vision includes elements such as improved pedestrian walkways, added green-space or “green corridors” along Archer Avenue, or other amenities associated with the redevelopment or commercial areas.

Advisory Committee members sought an improvement in retail variety and quality as part of their vision for an improved quality of life. This included such amenities as a “tablecloth” or “sit-down” restaurant and better quality retail sources for fresh meat and produce.

##### **Create Economic Growth and Opportunities in the Community**

The community has identified the need for high-paying, quality jobs in Jamaica as a primary concern. The vision for redevelopment of under-utilized, industrial properties, while retaining those “good actors” currently in place, is an important step towards bringing such jobs to the community. Simultaneously, the removal of junkyards and other noxious uses from these areas is seen as a critical component of both en-



hancing the use of industrial areas and removing a visual blight that diminishes the value of nearby residential and commercial property and discourages re-development.

### **Create Housing Opportunities in the Community**

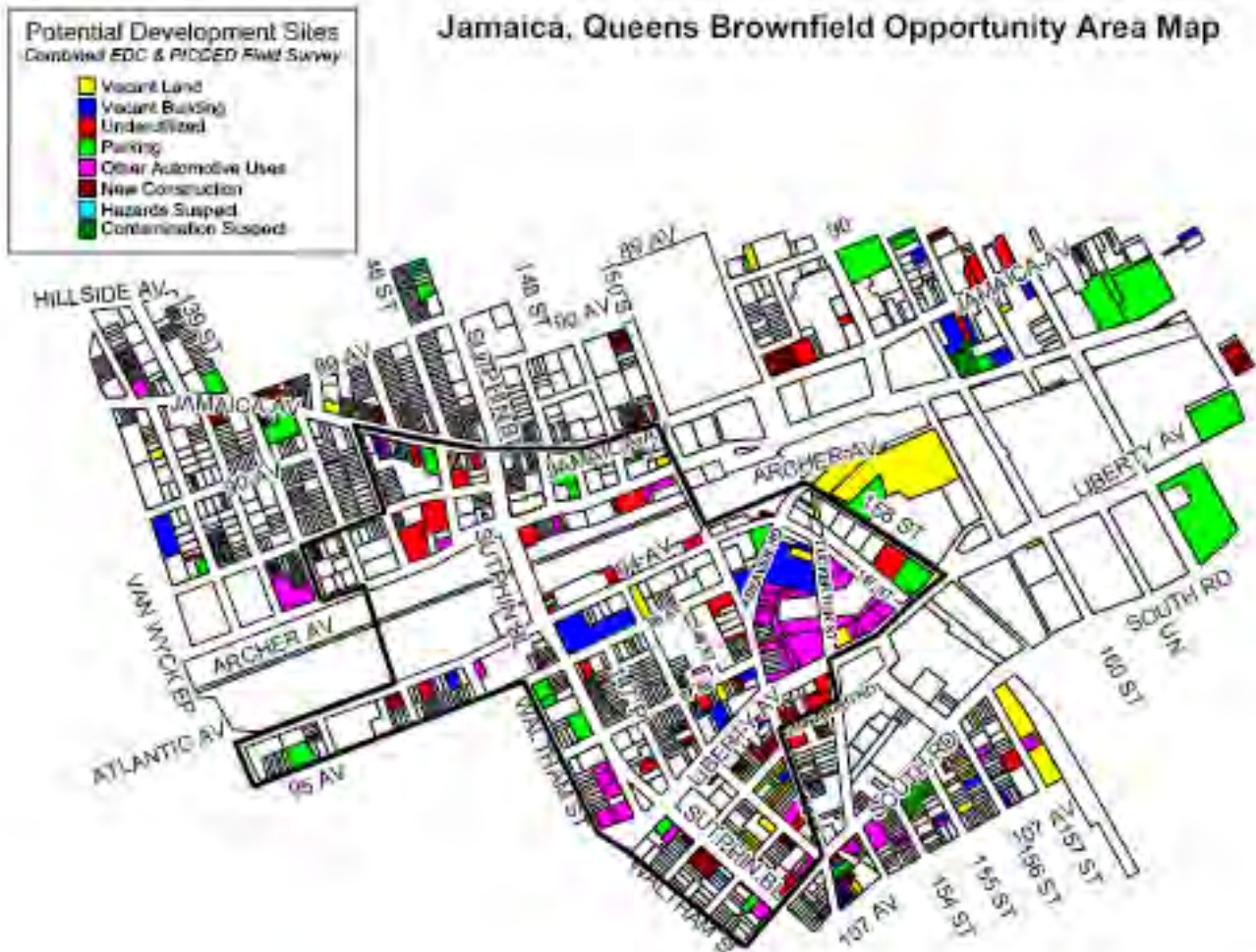
The recent re-zoning of over 380 blocks in Jamaica, led by New York’s Department of City Planning under their “Jamaica Plan,” provided residents with an opportunity to consider many of the issues surrounding housing in areas zoned for residential use. The vast majority of the Jamaica BOA is zoned for commercial and industrial use, but where opportunities for residential redevelopment do exist, it should not increase residential density beyond the capacity of local infrastructure, especially schools, to absorb any increase in population.

## **1.4 Brownfield Opportunity Area Boundary Description and Justification**

### **Physical Description of the Boundary**

The Study Area for the Jamaica Brownfield Opportunity Area Nomination Study is located in Downtown Jamaica in the Borough of Queens, New York. The Study Area is bounded approximately by the Van Wyck Expressway to the west, York College to the east, Jamaica Avenue to the north and South Road to the south.

**Figure 4 - BOA Land Use Map Showing Underutilized, Vacant or Abandoned Properties<sup>3</sup>**



<sup>3</sup> Underutilized sites are those that fall far short of highest and best use, such as optimal use of allowable FAR (Floor Area Ratio) under zoning constraints. Properties with buildings in sufficient repair for use, but which lie fallow, are considered vacant buildings. Vacant lands are empty lots. Abandoned properties would be those with buildings in utter disrepair and not suitable for use without extensive renovation or clearance. As of 2009, the large site noted as a vacant building on Sutphin Boulevard between 94<sup>th</sup> and 95<sup>th</sup> Avenues has been demolished and the site cleared. It is currently vacant land under the control of a private developer seeking investors for mixed use development of affordable housing, parking and retail. Phase II studies revealed no contamination at the site.

## Summary of Border Justification

In order to properly identify the boundaries for the Jamaica BOA Study Area, the results of several studies and redevelopment efforts, as well as the research of consultants hired specifically for the task of data collection, were examined.

Factors examined in the formulation of the boundaries of the Study Area included:

- Locations of existing infrastructure projects
- Locations of existing transportation nodes, including the Long Island Railroad and the AirTrain
- Location of underutilized properties
- Location of brownfields
- Location of stable commercial and industrial properties unlikely to see redevelopment in the near term
- Vehicular and pedestrian traffic patterns
- Location of properties with a high degree of redevelopment potential from a market demand perspective
- Location of residential neighborhoods unlikely to see redevelopment in the future
- Proposed re-zoning of Downtown Jamaica by the New York City Department of Planning
- Community support for certain types of redevelopment
- Geographic breadth of the impact of redevelopment in Downtown Jamaica

The Study Area includes a large number of properties that have prospects for redevelopment and are potentially contaminated. Properties on which redevelopment would not be supported by the community were excluded from the Study Area. In addition to these factors, the level of demand in the private sector for redevelopment for certain uses within the study area was also a significant consideration.

The Study Area boundaries coincide with several important geographic and development features in Downtown Jamaica. It includes the major infrastructure projects that are either underway or planned for the near future. These projects will act as significant catalysts for future development in close proximity. The Study Area also includes many properties that are not being utilized to their full market potential. The recent rezoning of Downtown Jamaica resulted in significant increases in maximum floor area ratio for several properties in the Study Area, as well as rezoning a significant number of properties in the Station Area from industrial to commercial use.

The market/demand analysis undertaken as part of the Nomination Study process indicates that there is redevelopment potential from a market perspective. We can, therefore, expect private investment to bring about change in Downtown Jamaica which will likely include things such as a shift in the character of vehicular traffic, an increase in pedestrian activity along certain key corridors, land use changes and changes to the market value of some properties. Other sources of information, such as the State's Spills Information Database, indicate the presence of brownfields. As the BOA program is designed largely around the confluence of economic opportunity and environmental neglect, the Study Area appropriately reflects this intent.

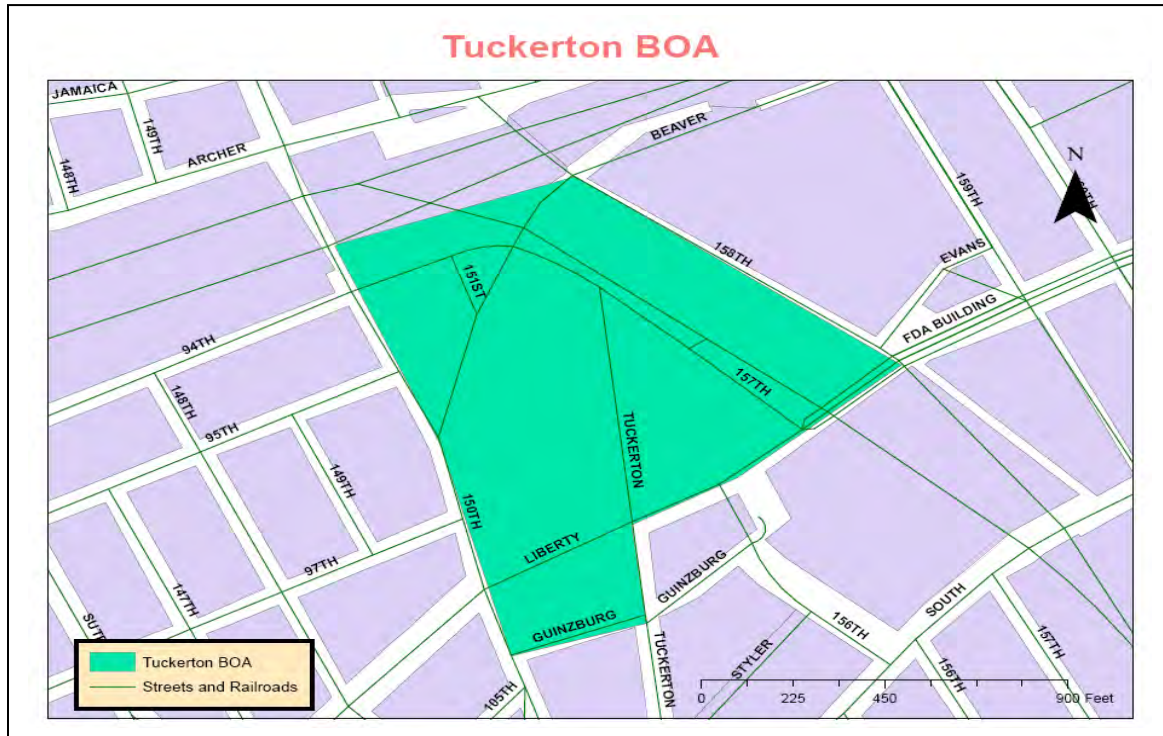
We note here the need for patience, given the downturn in the global economy and uncertain investment climate that occurred after completion of the market/demand analysis conducted for this Nomination Study.

Based upon the Project Team's analysis of the Study Area and consideration for the goals and objectives of the State of New York's Brownfield Opportunity Area program, the Study Area has been further segmented into four separate areas each of which are proposed for designation as a BOA through this Nomination Study. Each of these four BOAs serves a different and distinct function within Downtown Jamaica.

We therefore suggest that the Jamaica BOA take a strategic approach that can maximize the project's impact. The balance of this study provides for your consideration **four separate BOAs** within the wider BOA boundaries already defined in this nomination.

**A Strategic Approach to Maximizing the Impact of the Jamaica BOA:  
Study Area Divided into Four Brownfield Opportunity Areas**

**Tuckerton BOA**

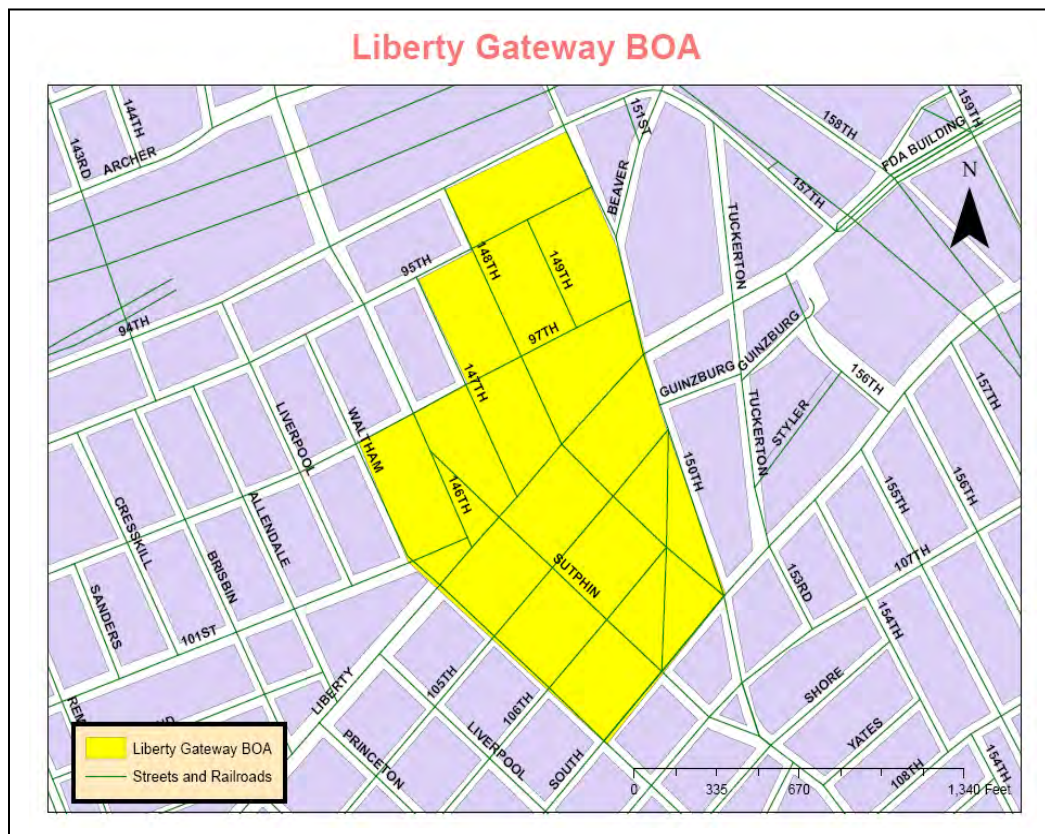


**Physical Description of the Boundary**

The Tuckerton BOA is bounded by the Long Island Rail Road right-of-way to the north, 158<sup>th</sup> Street to the east, 150<sup>th</sup> Street to the west and Guinzburg Road to the south. The Tuckerton BOA can effectively be summarized as the “reuse” district of Downtown Jamaica in that it has a high number of junk yards and other kinds of recycling and re-packaging. The district, which was zoned M1-1 for many decades and has been up-zoned to M1-4 with the 2008 rezoning, has attracted these uses. Residential areas are located nearby and these uses have generally encountered hostility from the community.



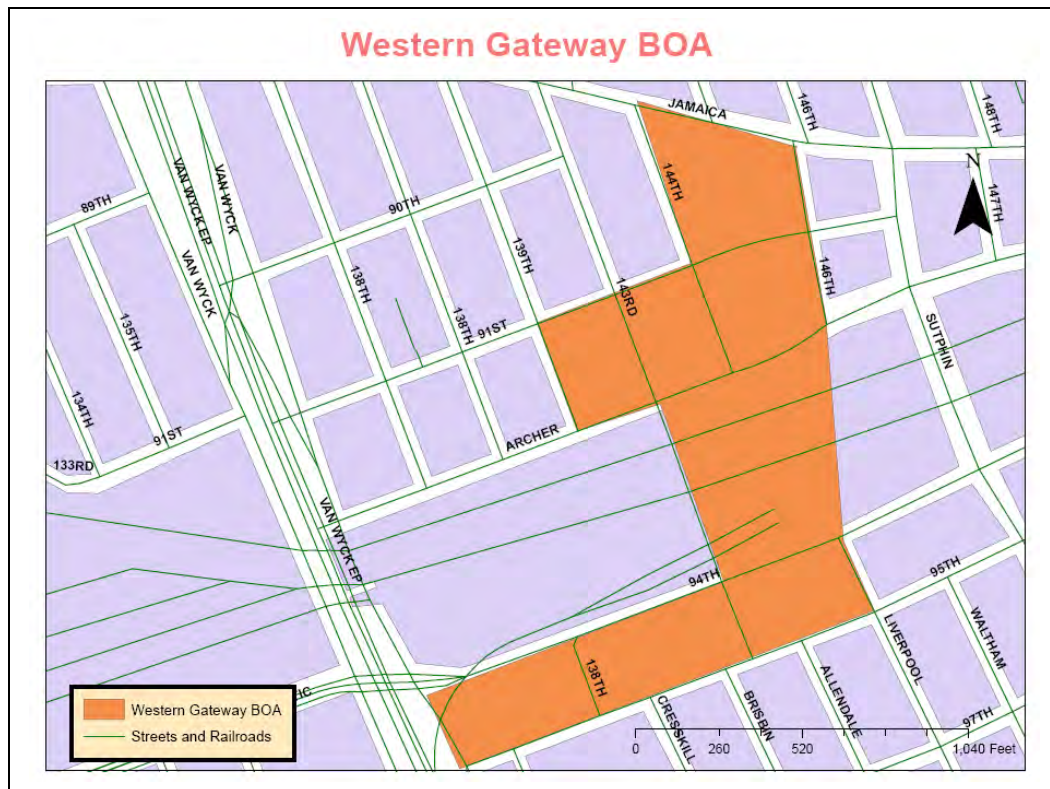
## Liberty Gateway BOA



### Physical Description of the Boundary

The Liberty Gateway BOA is bounded by Waltham Street on the west side; 94<sup>th</sup>, 95<sup>th</sup> and 97<sup>th</sup> Avenues on the north side; South Road to the south; and, 150<sup>th</sup> Street to the east. The Liberty Gateway BOA functions as a key residential area within Downtown Jamaica, though the area is a key transitional district in that several important industrial uses are located here. It serves as the passageway for motorists moving into the downtown area from the Van Wyck Expressway.

## Western Gateway BOA

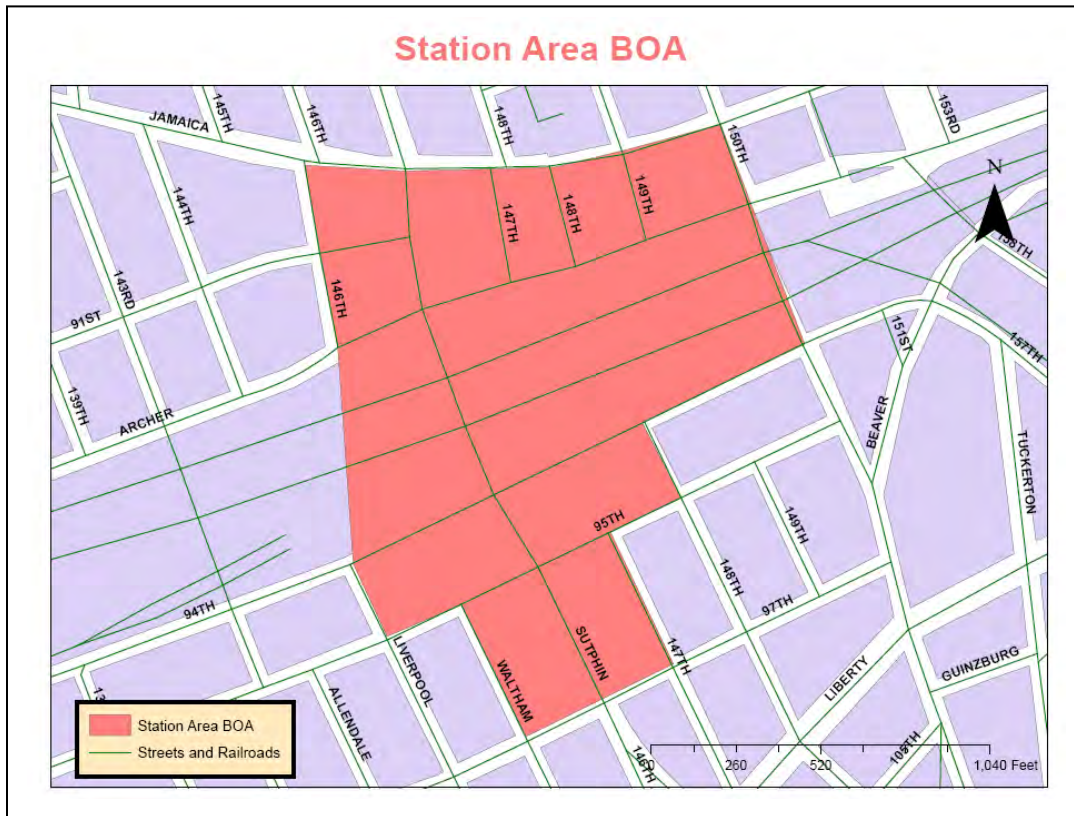


### Physical Description of the Boundary

The Western Gateway BOA is bounded on the west side by the Van Wyck Expressway, the south at 95<sup>th</sup> Avenue and on the east side at 146<sup>th</sup> Street and Liverpool Street. A portion of the LIRR and AirTrain rights-of-way lie within the Western Gateway BOA, whose northern boundary is variously located at Jamaica Avenue, 91<sup>st</sup> Avenue, Archer Avenue and 94<sup>th</sup> Avenue. While the Van Wyck Expressway does not have an interchange at the western boundary, a project is underway that will extend Atlantic Avenue over the Expressway and funnel it into 95<sup>th</sup> Avenue.



## Station Area BOA



### Physical Description of the Boundary

The Station Area BOA is bounded on the east by 150<sup>th</sup> Street, the west by 146<sup>th</sup> Street and Liverpool Street, the north by Jamaica Avenue and the south by a combination of 94<sup>th</sup>, 95<sup>th</sup> and 97<sup>th</sup> Avenues. This area contains the most visible symbol of economic revitalization efforts in Downtown Jamaica: The Air-Train and Long Island Rail Road terminals on Sutphin Boulevard. The Sutphin Boulevard/Archer Avenue station of the New York City subway is also located within this BOA.

**More detailed information on, and justification for, defining four Brownfield Opportunity Areas is in Section 3:  
“Analysis of the Proposed Brownfield Opportunity Areas”**

## SECTION 2

### PUBLIC PARTICIPATION PLAN AND TECHNIQUES TO ENLIST PARTNERS

#### Section 2: Public Participation Plan and Techniques to Enlist Partners

##### 2.1 Public Participation Plan

To ensure that the public's concerns about these and other subjects are properly addressed in the redevelopment accompanying the BOA initiative, GJDC developed a Community Participation Plan for the Nomination Study.

The Community Participation Plan was drafted and released to an Advisory Committee at its second meeting on March 27, 2007. Initial invitees included representatives of public agencies; public officials; the local Community Board (CB 12); and local residents, business people and property owners. The public outreach process was discussed at length in the meeting and the Committee made several recommendations for modification of the process. These modifications were folded into the Plan and the final version was distributed on May 31 and is included below.

Recognizing that community input is a crucial element to the **Jamaica, Queens Brownfield Opportunity Areas Program (BOA)**, a **Community Participation Plan (CPP)** to identify critical stakeholders, define the interfaces between **Greater Jamaica Development Corporation (GJDC)**, the community, governmental agencies and elected officials will be initiated. Most importantly the CPP will define how GJDC will provide an opportunity to compile the public's knowledge regarding the history of a given property or property grouping so that informed decisions may be made regarding the ultimate recommendation.

The CPP details the approach GJDC will utilize to inform stakeholders and to fully involve the community in program implementation. The CCP will be the driving force behind the success

of the BOA program. The following sections will summarize the measures that will be put in place to maintain an effective link between the project and the community.

### **BOA Advisory Committee and Technical Partnership Development**

GJDC will identify and invite important stakeholders to function as an Advisory Committee and create Technical Partnerships to help guide the project. Written invitations, telephone queries, one-on-one contact and stakeholder referrals will be used to enlist membership/partnering for the project. A contact list will be prepared, updated and maintained that includes the names, addresses, telephone numbers, and e-mail addresses of individuals and organizations committed to these efforts.

The function of the Advisory committee will be to directly contribute to the inventory, evaluation, and prioritization of the potential Brownfields sites. The Advisory Committee shall include stakeholders with active linkages within the community, such as neighborhood associations, community groups, realtors, developers, property owners, elected officials, and the local community board. The Advisory Committee will have the opportunity to participate in a series of informational meetings, design charettes, discussion groups, and visioning workshops. This exercise shall help shape the goals, objectives, opportunities and ultimate vision for the BOA.

Technical Partnerships shall be developed to seek assistance from a variety of potential partners. Elected officials, government agencies, property owners, private sector interests involved in current development projects, and local development corporations will be enlisted to help formulate and implement the program. This effort is designed to:

- assist in gaining information on past/current/future investigations that may impact the project
- gain information about funding opportunities available to facilitate future clean-ups, foster redevelopment
- gain support from government agencies for permitting and financing
- coordinate government agency and private sector actions
- improve overall communication

### **Public Hearings and Workshops**

GJDC intends to hold at minimum four public informational/visioning sessions during the course of the project. The advisory committee will be notified in advance of each session and will be urged to attend to share their knowledge and experiences.

As follows are the proposed formats for each session,

**Forum #1(Kick-Off)** Introduction of government agencies. Description of program's intent and scope. Report on existing conditions and current development projects in the BOA. Begin process of defining the community's vision for development of the overall area through stakeholder input.

**Forum #2** Introduction of selected consultants. Description of the boundaries, socio-economic conditions, demographic trends, and projections. Solicit input/comment concerning program

goals, objectives, and community vision relative to alternative approaches to redevelopment and revitalization. Presentation of CCP for community comment.

**Forum #3** Presentation of the inventory and analysis of the entire BOA, including an in-depth and thorough description and analysis of existing conditions, opportunities and reuse potential. Advisory input and comment in preparation for final recommendations.

**Forum #4** Wrap up and presentation of final recommendations prior to submittal.<sup>4</sup>

### **Additional Outreach Efforts**

GJDC will also hold three smaller meetings with key segments of the community to identify their particular needs and concerns as they relate to redevelopment and brownfields in Jamaica. One meeting each will be held with small business owners, residents and members of Community Board 12. In addition, a focus group meeting will be held to discuss the market study findings of the market/demand analysis consultant. GJDC will organize a design workshop within which design issues related to the selected redevelopment scenarios can be identified and discussed.

GJDC will meet and confer with the advisory committee as often as deemed necessary to ensure open communication.

Prior to the final selection of redevelopment scenarios, if deemed appropriate by the Community Board 12's executive committee, GJDC will make a BOA presentation to Community Board 12 at its monthly public hearing.

### **Post Nomination Activities**

Once the BOA is granted nomination, GJDC will ensure continued community participation during the testing and environmental quality review phase of the project. A new meeting schedule will be developed based on anticipated milestones, project schedule and Advisory Committee availability. Advisory Committee membership will be reviewed and expanded to accurately reflect the additional tasks, goals and objectives this phase. Initiatives (outreach, contact lists, workshops, etc.) similar to those utilized during the earlier phases of the project will be put in place. Additionally, technical partnering development will continue as a critical aspect of the process.

## **2.2 Techniques to Enlist Partners**

GJDC used a range of techniques to engage the public in the development of the Nomination Study. As the City of New York was engaged in public outreach for the Jamaica Plan at nearly the same time, this created some unique opportunities and challenges in the outreach process.

### **Mail, Email and Website**

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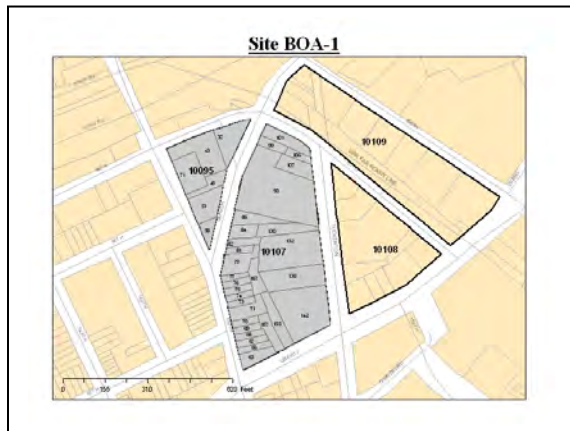
<sup>4</sup> Given the number of intermediate meetings with small groups, in lieu of a fourth meeting GJDC distributed the final draft of the Executive Summary, the Redevelopment Scenarios for Strategic Sites, and Community Comments on Redevelopment Scenarios to the Advisory Committee for comment before submittal to the Department of State.

The Project Team sent mailings regularly to project stakeholders to keep them updated. These mailings focused on the progress of the BOA planning process and the need for information about the goals and objectives of residents, community groups and property owners. Project stakeholders were also emailed regularly and these emails targeted individuals with a particularly high level of familiarity with the development potential of the Study Area and the land use history of the properties. Meeting summaries and other information were posted on a website ([www.gjdc.org](http://www.gjdc.org)) to give both residents and project stakeholders the opportunity to review findings and monitor the BOA process.

## **Design Meeting**

The Project Team held a design meeting in July 2007 that was attended by a wide range of individuals including residents, community planners and property owners. Attendees were divided into small groups each of which examined a portion of the BOA Study Area to identify the suitability and ideal characteristics of redevelopment for strategic sites. Several important objectives and quality-of-life considerations were identified at this meeting, particularly by residents of the Study Area. A summary of these redevelopment scenarios and the comments from the design meeting are below.

## Tuckerton BOA: Strategic Site 1 Development Scenario



**Block:** 10095 (Site 1A)  
10107 (Site 1B)

### Lot Area:

Combined 312,279 square feet before roadway / infrastructure improvements

(Site 1A = 61,060 sf; Site 1B = 251,219 sf)

**Current Zoning:** M1-1

**Proposed Zoning:** M1-4

**Maximum Permitted Floor Area at 2.0 FAR:**

• 624,558 square feet before infrastructure improvements

### Designations

• **Special Downtown Jamaica District Zoning (SDJD)**  
**Environmental/Past Uses**

• **High likelihood of contamination on all blocks** (probable automotive fuels and fluids contamination in soil and groundwater; some land used for waste container storage)

• **Known contamination sites on Site 1A, Lots 43 and 58 and Site 1B, Lot 63**

**Active Uses (as of 1/07):**

• **Site 1A:** Car Service/Liveries (Lot 43); Haifa Seafood (Lot 71)

• **Site 1B:** Live Food Market (centered around Lot 101); Pizza Restaurant (Lot 157); at least 7 auto-related businesses (storage and repair)

**Inactive Uses (as of 1/07):**

• **Site 1A:** 4 vacant lots/buildings (Lots 32, 49, 51, 58)

• **Site 1B:** approximately 20 vacant and underutilized lots/buildings

### Potential for Development

• **Access:** the Atlantic Avenue Extension and the One-way Pair make these combined sites a retail destination from the Van Wyck and create new, vital intersections at 150<sup>th</sup> Street and 94<sup>th</sup>/95<sup>th</sup> Avenues; the center of the downtown commercial retail area is accessible by short tunnels underneath the Long Island Railroad embankment; Liberty Avenue brings commuters to and from eastern Queens and Nassau County



• **Property Size and Adjacent Uses:** existing businesses on adjacent Blocks already resemble a retail/industrial hybrid and mixed-use district (e.g., stucco supply business; iron gate and houseware supply companies) that could be supported or incorporated into larger retail opportunities on BOA 1; two area anchors, York College and FDA, are directly across railroad from this area

• **Availability/Ownership:** Available land and buildings (including City-owned property and sites previously identified in community-based plans as strategic, such as Site 1B, Lot 90); includes automotive junkyards in violation of the zoning resolution (which could result in easier acquisition/assembly)

• **Community Goals and Impact on Jamaica:** Greatest Brownfield challenge in the entire BOA; retail and destination opportunities; support existing industrial businesses

### Proposed Uses:

• **Large-scale retail** (potentially home improvement) and/or industrial (depending on assemblage)

**Actions required to develop this site:**

• **Re-zone Sites 1A and 1B to M1-4**

• **Approach DCP regarding potential de-mapping of Beaver Road between 150<sup>th</sup> and 157<sup>th</sup> St.; prepare zoning application and environmental review of the action (and/or file a ULURP application to build over Beaver Street)**

• **Request permission from both Finance and the Department of Buildings to assemble parcels**

• **Identify anchor tenant and development funds**

• **Acquire Lot 90 on Site 1B and acquire remaining lots**

• **Relocate active businesses**

• **Demolish existing structures**

• **Investigate soil conditions, possible remediation**

• **Obtain approximately 50% public financing for any garage construction related to creation of large-scale retail**

### Related Infrastructure Improvements:

• **Improvements to One-Way Pair terminus at 150<sup>th</sup> Street** (especially streetscape, traffic calming and ped xings).

• **Incorporation of Beaver Road into site plans**

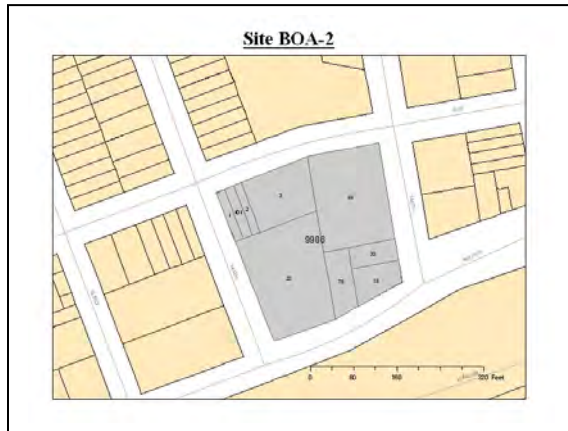
**Tuckerton BOA**  
**Community Design Meeting Comments on the Development Scenario**

*The redevelopment scenario examined for Site 1 recommended large-scale retail development and/or industrial uses on the site.*

- This site should not be expanded to include Block 10109 but it should be expanded to include 10108 because that block has known contamination
- Beaver Street should be de-mapped
- Leverage nearby assets such as the dairy, York College and the FDA to bring development to the site
- Try to expand from within by encouraging growth of existing businesses
- Determine if the site can remain industrial and still be cleaned up
- Seek to eliminate the junkyards and auto-related uses
- There are some major employers and good clean businesses that need to remain and be promoted
- Any reuse plan should seek to mitigate job loss by creating new jobs
- While proceeding with the redevelopment, the enforcement efforts against businesses violating codes needs to be stepped up, including preventing encroachment onto sidewalks, maintaining visual buffers, decreasing the noise from the car crushers and the smell from the burning cars and the livestock market
- The views and visual quality along Liberty Avenue need to be improved because the existing ugliness prevents new businesses from coming into the area
- The currently pending zoning change will positively influence development in the area
- Redevelopment of the site should take advantage of the close access to transit, which is important to the industrial workers presently there
- The redevelopment should have some commercial fronting on Liberty Avenue and a new light industrial park in the back
- Liberty Avenue acts as a gateway to the area and, as a result, streetscape appearance should be an important consideration, especially when examining curb cuts
- 150<sup>th</sup> Street is an important access road for businesses in this area



## Western Gateway BOA: Strategic Site 2 Development Scenario



**Block: 9986**

**Lots: 1, 101, 2, 3, 20 (Site 2A)  
61,70, 73 and 75 (Site 2B)**

**Lot Area:**

**82,567 square feet before roadway/infrastructure improvements**

**(Site 2A=45,165 sf; Site 2B=37,402 sf)**

**Current Zoning: M1-1**

**Proposed Zoning: C4-4A**

**Maximum Permitted Floor Area at 4.6 FAR:**

**• 379,808 square feet before infrastructure improvements**

**Designations**

- **Special Downtown Jamaica District Zoning**
- **Affordable Housing Alternative Eligible (AHA)**

**Environmental/Past Uses**

- **Known Contamination on Lot 2 and Lot 75**
- **Spill report from LIRR (Lot 20)**

**Active Uses (as of 1/07):**

- **Residential (Lots 1, 101, 2)**
- **NYCTA Print Shop/storage yard (Lot 20)**
- **Sunshine Day School (Lot 61)**
- **Auto Repair (Lot 73)**
- **LIRR Human Resources/Employment (Lot 75)**

**Inactive Uses (as of 1/07):**

- **Vacant Building (Lot 3)**
- **Vacant retail building – For Rent (Lot 70)**

**Potential for Development**

- **Access: walking distance to regional public transportation and shopping in Downtown Jamaica; 143<sup>rd</sup> Street cut-through provides access to Van Wyck**
- **Property Size and Adjacent Uses: assembled block creates good potential for scale and residential/office/retail would be in character with surrounding community/uses**



**Potential for Development (Cont.)**

- **Availability/Ownership: two publicly-owned parcels and vacant/underutilized parcels might allow for easier acquisition**

- **Community Goals and Impact on Jamaica: increased residential in the Downtown supporting new and existing retail; opportunity for increased retail options for local shoppers**

**Proposed Uses:**

- **Residential: “Downtown Living” Lofts**
- **Office/Live-Work**
- **Retail serving local residents**

**Actions required to develop this site:**

- **Re-zone Sites 2A and 2B to C4-4A**
  - **Acquire 9 lots**
  - **Relocate (or wait for lease expiration on) active establishments and residents of three attached single-family residences**
  - **Request permission from both Finance and the Department of Buildings to join parcels**
  - **Determine feasibility and necessity of acquiring residential lots (1, 101, 2)**
  - **Check activity/use on Lot 3**
  - **Demolish existing structures**
  - **Investigate soil conditions, possible remediation**
  - **Identify developer for development funds**
  - **Contact Landmarks Preservation Commission / State Historic Preservation Office to determine if certificate of appropriateness is required**
- Related Infrastructure Improvements:**
- **Roadway improvements to Archer Avenue**

**Western Gateway BOA**  
**Community Design Meeting Comments on the Development Scenario**

*The redevelopment scenario examined for Site 2 recommended residential “Downtown Living” lofts, office space to provide for a live/work development and retail serving local residents.*

- Obtain cooperation from property owners
- Several constraints to development on the site, including presence of a landmarked building, an underground MTA facility, the C4-4A zoning designation and some known contamination. The landmarked building should be preserved and reused
- Put in more pedestrian space (e.g. widen the sidewalk)
- Explore several different options for the residential portion, including affordable, rental housing and/or condominiums
- Accommodating parking on the site will be a challenge but it’s necessary and should employ a buffering technique, such as putting a façade in front of it
- The retail development should face the new open air market that is already being developed on the adjacent site
- The area along Archer Avenue should be a “green corridor”
- Use façade techniques to break up the mass of the building and consider having separate entrances to the building for the separate uses
- A small amount of boutique office space should be placed along 146<sup>th</sup> Street
- One design element to consider is an internal courtyard
- The building should conform to “green” standards
- The project may result in increased vehicular congestion in the immediate area, as well as a displacement of a school
- The project will result in job creation, greater residential density adjacent to transit, cleanup of contamination, increased open space and potential for 24-hour activity. The project would also complement existing efforts well

## Station Area BOA: Strategic Site 3 Development Scenario\*



**Block: 9998**

**Lots: 101, 109, 110, 119, 124, 127**

**Lot Area: 52,742 square feet before road-way/infrastructure improvements**

**Current Zoning: M1-1**

**Proposed Zoning: C6-3**

**Maximum Permitted Floor Area at 8.0 FAR:**

• **461,936 square feet before infrastructure improvements**

• **( ) square feet after infrastructure improvements**

**Designations**

- **Jamaica Gateway Urban Renewal Area**
- **Special Downtown Jamaica District Zoning**
- **Affordable Housing Alternative Eligible (AHA)**
- Environmental/Past Uses**
- **High likelihood of contamination on all blocks (due to auto-related uses)**
- **Potential Brownfield on Lot 101 (and adjacent Lot 95)**

**Active Uses (as of 1/07):**

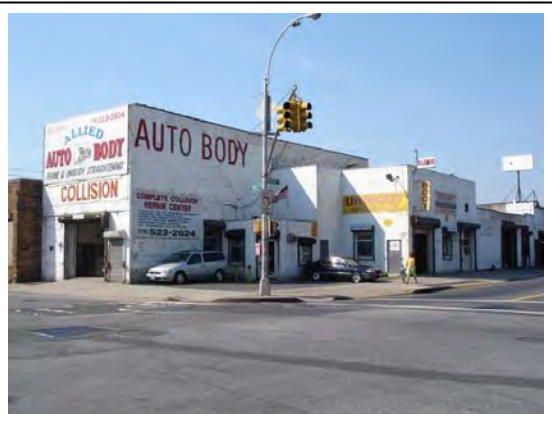
- **Auto Repair (Lot 109)**
- **For Sale Parking Garage/Warehouse (Lot 110)**
- **Auto Repair (Lot 119)**
- **Auto Body/Auto Service (Lot 124)**

**Inactive Uses (as of 1/07):**

- **Former MTA/LIRR info office (Lot 101)**
- **Vacant warehouse (Lot 127)**

**Potential for Development**

- **Access: walking distance to public transportation (Air train/LIRR and bus station); site acts as the northern terminus of a better utilized 150<sup>th</sup> St.**
- **Property Size and Adjacent Uses: assembled block creates potential for scale; supports adjacent development (large-scale residential and retail)**



**Potential for Development (Cont.)**

- **Availability/Ownership: vacant/underutilized parcels might allow for easier acquisition and assemblage**
- **Community Goals and Impact on Jamaica: increase supply of parking for residents; increase retail opportunities in vicinity of bus station to serve both regional and local residents**

**Proposed Uses:**

- **10,000 sf to 50,000 sf of retail (potentially wrapped around parking facility)**
- **Parking garage (600 parking spaces)**

**Actions required to develop this site:**

- **Re-zone to C6-3**
- **Prepare an Environmental Assessment Statement (EAS) for the parking garage**
- **Hire design experts to investigate feasibility/cost of wrapping parking in retail/active uses (and connect with public officials involved in national best practice developments for: Cambridge, MA; Gaithersburg, MD; and Boulder, CO.)**
- **Obtain approximately 50% public financing for garage construction (capital costs) to support the financing of the facility**
- **Request permission from both Finance and the Department of Buildings to join parcels**
- **Acquire 6 lots**
- **Relocate current auto establishments**
- **Demolish existing structures**
- **Investigate soil conditions, possible remediation**
- **Identify development funds**
- Related Infrastructure Improvements:**
- **Possible realignment and related improvements to Archer Avenue**

\*Subsequent to development of the development scenario, the large, centrally located lot within this block was purchased by a private developer. Plans call for a Marriot Residence hotel on this site. The westernmost lot in the strategic site was purchased by a corporation controlled by GJDC, along with the lots immediately to the west of that lot up to the street intersection. Planning for this site is for a mixed use project including hospitality, retail and residential uses.

**Station Area BOA**  
**Community Design Meeting Comments on the Development Scenario**

*The redevelopment scenario examined for Site 3 recommended 10,000 – 50,000 square feet of retail space, with the remainder of the site devoted to a parking garage.*

- Rehabilitate the parking lot across the street and make it public
- Bring in a full service executive health club with a pool and a sauna
- Use the site to add retail and service diversity to the neighborhood, such as high end retail, a tablecloth restaurant, a full service executive health club or a bookstore/café.
- Put in a restaurant on top of the 150th Street parking garage so that it would have a view over King Park
- Put in more taxi stands and shelters near the site
- Improve the bus turnaround at 150th Street
- Improve bus traveler amenities, including building better bus shelters
- All properties considered for redevelopment should include a “right of first refusal” for the community
- Job creation for community residents should be mandated of both developers and businesses that operate on the property
- Relocate the bus area as its taking up prime real estate space

## Liberty Gateway BOA: Strategic Site 4 Development Scenario



**Block/Lot:** 10000/ 24, 31 (Site 4A)  
10002/ 1 (Site 4B)  
10002/ 5 (Site 4C)  
10001/ 1 (Site 4D)

### Lot Area:

Combined 145,679 square feet before road-way/infrastructure improvements  
(Site 4A=32,800 sf; Site 4B=40,077 sf; Site 4C=10,120 sf; Site 4D=62,682 sf)

**Current Zoning:** M1-1

**Proposed Zoning:** M1-4

**Combined Max Permitted Floor Area at 2.0 FAR:**

• 291,358 square feet before infrastructure improvements

### Designations

• Special Downtown Jamaica District Zoning (SDJD)  
Environmental/Past Uses

- High likelihood of contamination on all sites (due to metal and concrete work)
- Potential Brownfield on Site 4A (and smaller Lots 3 & 38 in same Block 10000)

### Active Uses (as of 1/07):

- Site 4A, Lot 24: Queens Industrial Electric; Lot 31: Queens Ready Mix Concrete Plant
- Site 4B: Iron Works/Warehouse
- Site 4C: Concrete Factory/Masonry material storage

### Inactive Uses (as of 1/07):

- Site 4D: Vacant Building (for sale/rent)

### Potential for Development

- Access: the Atlantic Avenue Extension and the One-way Pair make these sites a destination from the Van Wyck and creates a new, vital intersection at 150<sup>th</sup> Street and 95<sup>th</sup> Avenue (Sites 4A and 4C);
- Property Size and Adjacent Uses: larger retail opportunities across 150<sup>th</sup> Street; residential uses to the west precludes large-scale retail that would require major truck access and/or parking (could share parking with development on Strategic Site 1); assemblage opportunities (two lots that comprise Site 4A; Site 4B with Site 4C) create scale, especially if 149<sup>th</sup> Street is considered for “de-mapping”



### Potential for Development (Cont.)

- Availability/Ownership: One building (Site 4D) already on market; remaining lots would need to be acquired
- Community Goals and Impact on Jamaica: remediation of Brownfields in close proximity to residential; new retail opportunities and amenities for local residents; increased revenue sources/support for some existing industrial businesses in surrounding area (especially within the Tuckerton Triangle)

### Proposed Uses:

- Wholesale/retail and possibility of retail/industrial hybrid (depending on assemblage opportunities)

### Actions required to develop this site:

- Re-zone to M1-4
- Approach DCP regarding potential de-mapping of 149<sup>th</sup> Street; prepare zoning application (for an amendment to the City Map) and environmental review of the action (and/or file a ULURP application for a special permit and prepare environmental assessment form to build over 149<sup>th</sup> Street)
- Request permission from both Finance and the Department of Buildings to join parcels
- Identify potential tenant and development funds
- Investigate the acquisition of small residential lots (such as Lot 19 on Block 10001) to combine with Sites 4B and 4C and especially 4D
- Relocate active businesses
- If necessary, demolish existing structures
- Investigate soil conditions, possible remediation

### Related Infrastructure:

- Improvements to One-Way Pair terminus for pedestrian connections across 150<sup>th</sup> Street
- Incorporation of 149<sup>th</sup> Street into site plans

**Liberty Gateway BOA**  
**Community Design Meeting Comments on the Site 4 Development Scenario**

*The redevelopment scenario examined for Site 4 recommended wholesale/retail uses or a retail/industrial hybrid.*

- The streets should be tree-lined but you should use dogwood trees or something similar, as roots grow excessively if you choose the wrong species
- Buffers should be provided for parking areas on the site, such as shrubs
- 149<sup>th</sup> Street should be de-mapped
- Some setbacks, landscaped with grass or other elements, should be employed at the redeveloped site
- All parking should be accommodated on-site, as parking is already a problem in the area
- No further displacement of residential uses in the area should occur
- Any future redevelopment should not include businesses that generate a great deal of traffic, noise or dust, such as big-box retail or more cement plants
- The existing cement plant in the area should be removed
- The redevelopment of the site should include a community use, such as a senior center
- A small hotel or motel would be a nice addition to the redevelopment scenario
- Traffic calming measures should be examined for the area, particularly 150<sup>th</sup> Street
- An analysis should be done to determine if a stop light is appropriate for the intersection of 148<sup>th</sup> Street and 95<sup>th</sup> Street
- The retail included as part of the redevelopment should be personal services in nature, such as a dry cleaner or an eyeglass shop
- Entrance and exit to the site should be on 150<sup>th</sup> Street, as that will reduce the impact of the additional traffic
- The jobs as part of this redevelopment, both the construction and operational jobs, should be for community residents



## Liberty Gateway BOA: Strategic Site 5 Development Scenario



**Block/Lot:** 10058/ 1 (Site 5A)  
 10030/ 25, 28 (Site 5B)  
 10055/ 11, 14, 16, 17, 118, 19, 20, 21 (Site 5C)

**Lot Area:**  
 Combined 65,854 square feet before road-way/infrastructure improvements  
 (Site 5A=32,036 sf; Site 5B=19,839 sf; Site 5C= 22,979 sf )

### Current Zoning:

Site 5A: M1-1  
 Site 5B (Lot 25): M1-1  
 Site 5B (Lot 28): R5  
 Site 5C: R4

### Proposed Zoning:

Site 5A: R6A with C2 Overlay  
 Site 5B (Lot 25): C4-5X  
 Site 5B (Lot 28): C4-5X  
 Site 5C: R6A with C2 Overlay  
 Maximum Permitted Floor Area at 3.0 FAR (Residential on Sites L & Q):

- 165,045 square feet before infrastructure improvements

Maximum Permitted Floor Area at 5.0 FAR (Residential on Site P):

- 99,195 square feet before infrastructure improvements

Combined Maximum Permitted Floor Area (Site LPQ):

- 264,240 square feet before infrastructure improvements

### Designations

- Site 5A & Q: None
- Site 5B: Special Downtown Jamaica District Zoning (SDJD) and Affordable Housing Alternative Eligible (AHA)

### Environmental/Past Uses

- Known Contamination on Site 5B, Lot 25 (Known Spill Site due to Auto Uses)

- Potential Brownfields on Site 5C, Lots 19, 20, 21

### Active Uses (as of 1/07):

- Site 5B (Lot 25): lot with tire repair business (no building); parking/storage of heavy machinery
- Site 5C (Lots 16/17): used tires
- Site 5C (Lots 20, 21): residential

### Inactive Uses (as of 1/07):

- Site 5A: Club Tobago (night club) building for sale / rent and parking in rear
- Site 5B (Lot 28): vacant lot
- Site 5C: former restaurant ("Jamaican Jim") on Lot 11

- Site 5C (Lot 14): vacant lot

- Site 5C (118, 19): vacant lot

### Potential for Development

- Access: Liberty Avenue and Sutphin Boulevard provide major east/west and north/south access into the BOA and connect Jamaica with other locations in Queens and the region; the intersection of Liberty Avenue and Sutphin Boulevard is a "100 percent" corner

- Property Size and Adjacent Uses: assemblage opportunities (two lots that comprise Site 5A; designated lots within Site 5C) create scale; corner locations are desirable; Liberty Avenue auto and pedestrian traffic allows for retail opportunities; Sutphin Boulevard between Jamaica Avenue and Archer Avenue is already one of the most active commercial blocks in downtown Jamaica; adjacent residential blocks require a buffer from more intense commercial/industrial uses

- Availability/Ownership: Inactive uses and vacant lots may make acquisition and assemblage easier; all of Site 5A already on the market

- Community Goals and Impact on Jamaica: effective development of these lots could provide a southern "anchor" to complement, balance and leverage destination retail happening north around Air-train/LIRR station and on Liberty Avenue/Sutphin Boulevard; smart design ensures a buffer for current and future residential population along and to the east of Sutphin Boulevard and on Sutphin Boulevard south of Liberty Avenue; Brownfield and other environmental remediation within close proximity to existing residential; key development sites change perception that the environment is unsafe

### Proposed Uses:

- Retail on ground floor (possibly two stories) along



**Liberty Avenue and residential above**

**Actions required to develop this site:**

- Re-zone Site 5A and 5C to R6A with C2 Overlay and re-zone Site 5B to C4-5X
- Request permission from both Finance and the Department of Buildings to join parcels
- Investigate the feasibility and necessity of acquiring small residential lots on Site 5C (Lots 20, 21)
- Identify potential retail tenants and developers who have track record of successful mixed-use retail/residential projects in high visibility and urban locations
- Relocate active businesses
- If necessary, demolish existing structures
- Investigate soil conditions, possible remediation

**Related Infrastructure Improvements:**

- “Greening” of Sutphin Boulevard south of Liberty Avenue provides clear distinction between residential and mixed-use sections of Sutphin Boulevard
- Streetscape improvements along Liberty Avenue would create a more cohesive and welcoming pedestrian experience and support new retail/residential uses

### **Liberty Gateway BOA Community Design Meeting Comments on the Ste 5 Development Scenario**

*The redevelopment scenario examined for Site 5 recommended retail on the ground floor, possibly for the first two stories, and residential on the upper floors.*

- The focus should be on expanding employment opportunities and providing services that make the area a more attractive place to live
- Design solutions in this area should take into account the existing car wash and the issue of traffic going into the car wash queueing up into the street
- Design solutions should also seek to continue efforts to improve the visual quality along Liberty Avenue and the functionality of the corridor
- We should consider eliminating Block 10058 Lot 1 from the site unless there is reason to believe it is contaminated, especially since the property is not blighted and has a viable business on it.

## Focus Group Meetings

The Project Team assembled four separate focus group meetings during the planning process. These meetings focused on design, market demand, resident concerns and business concerns respectively. The meetings sometimes included breakout sessions and were specifically designed to build consensus among the participants and develop recommendations for the Advisory Committee. These meetings were less structured and more interactive than the Advisory Committee meetings. This interactive approach was critical in ensuring that pointed and specific input was delivered by those most knowledgeable about given topics.

## Advisory Committee Meetings

Three meetings of the Advisory Committee were held throughout the development of the Nomination Study. The expertise of Advisory Committee members was a critical element, particularly in examining the feasibility of redevelopment strategies from the perspective of community and government support. The members of the Advisory Committee advised the Project Team on changes in both the regulatory and economic environment that proved essential in crafting the redevelopment strategies and in the identification of the four Brownfield Opportunity Areas. Summaries of these meetings are included in Appendix E. In lieu of a fourth meeting, the Executive Summary, along with redevelopment scenarios for strategic sites and comments on these scenarios from the design meetings, were distributed to all Advisory Committee members prior to submitting a final draft to the State.

## Community Groups

The degree of community participation in planning and economic revitalization initiatives in Downtown Jamaica is exceptionally high and community residents are knowledgeable of both the concept and process of community development planning. As a result, many community groups exist that are regularly engaged in local, city and regional initiatives. A critical technique to enlist partners was leveraging these community groups to reach certain segments of Jamaica's population.

Through this technique the Project Team was able to increase the breadth and diversity of the stakeholders providing input. Groups engaged included Community Board 12, 148<sup>th</sup> Street Block Association, Sutphin Boulevard Business Improvement District and local real estate associations. The wide range of perspectives brought to the BOA planning process, particularly from residents and business owners, enabled the Project Team to sharpen its focus in crafting and modifying the redevelopment scenarios and in selecting the sites targeted for redevelopment.

The concerns of the community, identified through the BOA Nomination Study public outreach process, centered on issues surrounding development in a general sense. Much of the community's concerns have been an outgrowth of a recent re-zoning initiative led by the New York City Department of Planning. This rezoning initiative is in response to a need for additional densities in some areas to accommodate the City's growing population, as well as some of the antiquated language of the existing zoning code.

### Concerns include:

Lack of adequate parking for residents – the influx of commuters into Jamaica during the day has a negative impact on residents' ability to park near their homes

Conflicts between incompatible uses (e.g. industrial vs. residential) – there are several residential properties in the BOA Study Area that are in close proximity to industrial uses that create noise and emit dust to levels inappropriate for residential areas

Lack of community input on some development projects in Jamaica – there is a need for greater outreach efforts by the City of New York, GJDC and private developers when a development project is being proposed

Public health as related to environmental contamination – redevelopment decisions should be based partly on the public health implications

Overcrowding of schools – any high-density residential development could have a negative impact on local schools that are presently experiencing overcrowding

Lack of investment from the local community in development projects – past efforts to attract investment to the community have not included those that live in the community and, therefore, do not have a personal stake in the outcome, possibly due to a lack of such resources in the hands of local community groups or individual residents in the community. There should be more community-based ownership of property and more community-oriented uses, such as youth centers.

Amenities that cater to visitors instead of residents – past decisions on which uses/projects to pursue are often focused on the needs of visitors or commuters, as opposed to residents

Bringing trade and professional organizations, youth groups, small businesses, residents and commuters into development discussions – the above groups are not presently involved in the redevelopment planning process

Junkyards and illegal dumping – the presence of junk yards and illegal dumping act as a deterrent to investment in the area

Use of eminent domain to achieve objectives – use of eminent domain to achieve redevelopment objectives is opposed by many members of the community and people whose properties will be subject to eminent domain should be informed of their rights

Big box retail – these types of uses are becoming too numerous in Jamaica

Control of vacant property - the community should have “first crack” at who develops vacant properties

Schools – there is a shortage of schools in the area and we need to build more

Restaurants – there is a lack of choice and no sit-down or “tablecloth” restaurants in the area

Property rights – the owner of a property should be the person who decides what should be done with it.

Personal service businesses – there is a need for more personal service businesses such as dry cleaners in the Study Area

Parks – there is a need for more parks, however, there are concerns that parks can provide a setting for crime in the neighborhood. There is community support for more “greening” of the neighborhood (e.g. planning of trees, establishing open space).

Residential development – Any residential development that occurs in the community should be affordable to those that live here

## Partners Providing Input on Boundaries

The BOA Study Area boundaries have been a topic for discussion at several meetings in the Nomination Study process. One meeting was held prior to the awarding of the BOA Nomination Study grant funds to build consensus on the original boundaries. This meeting took place between the New York City Department of City Planning, the New York City Economic Development Corporation and Greater Jamaica Development Corporation.

The remaining meetings included:

BOA Scoping Meeting	10/31/06
Advisory Committee Meeting #1	6/8/07
Advisory Committee Meeting #2	3/27/07
BOA Market/Demand Analysis Meeting	3/13/07
Advisory Committee Meeting #3	11/19/07

The following individuals were present at all or some of these meetings.

Sarah Ashcroft	Greater Jamaica Development Corporation
Jessica Baker	New York City Economic Development Corporation
Debbie Carney	New York City Department of City Planning (Queens office)
Nicole Clare	Economics Research Associates
Donna Clopton	148 <sup>th</sup> Street Block Association
Kate Coburn	Economics Research Associates
Curtis Cravens	New York State Department of State
Susan Deutsch	Consultant
Martine Duphrezin	Representing Property Owner
Peter Englebrecht	Greater Jamaica Development Corporation
Terrell Estesén	New York City Department of Environmental Protection
Louis Evans	Nixon Peabody
Sean Garrigan	Gannett Fleming
Robert Gaskin	Representing Property Owner
Barry Hersh	Consultant
Monica Lewis-Pringle	Office of Senator Shirley Huntley
Ben Margolis	Phillips Preiss Shapiro Associates
Ed McKay	Community Board 12
Melva Miller	Sutphin Avenue BID
Greg Polis	Property Owner
Dan Pollay	Greater Jamaica Development Corporation
Dan Ross	New York City Department of Transportation
Gary Rozmus	Gannett Fleming
Josslyn Shapiro	New York State Department of Environmental Conservation
Tammy Shoham	Economics Research Associates
Ben Sigman	Economics Research Associates
Julie Stern	New York City Department of Environmental Protection
Dan Walsh	New York State Department of Environmental Conservation
Richard Werber	Greater Jamaica Development Corporation
Muriel Williams	Resident
Chris Woods	Consultant

## SECTION 3

### ANALYSIS OF THE PROPOSED BROWNFIELD OPPORTUNITY AREAS

## **Section 3: Analysis of the Proposed Brownfield Opportunity Area**

### **3.1 Community and Regional Setting**

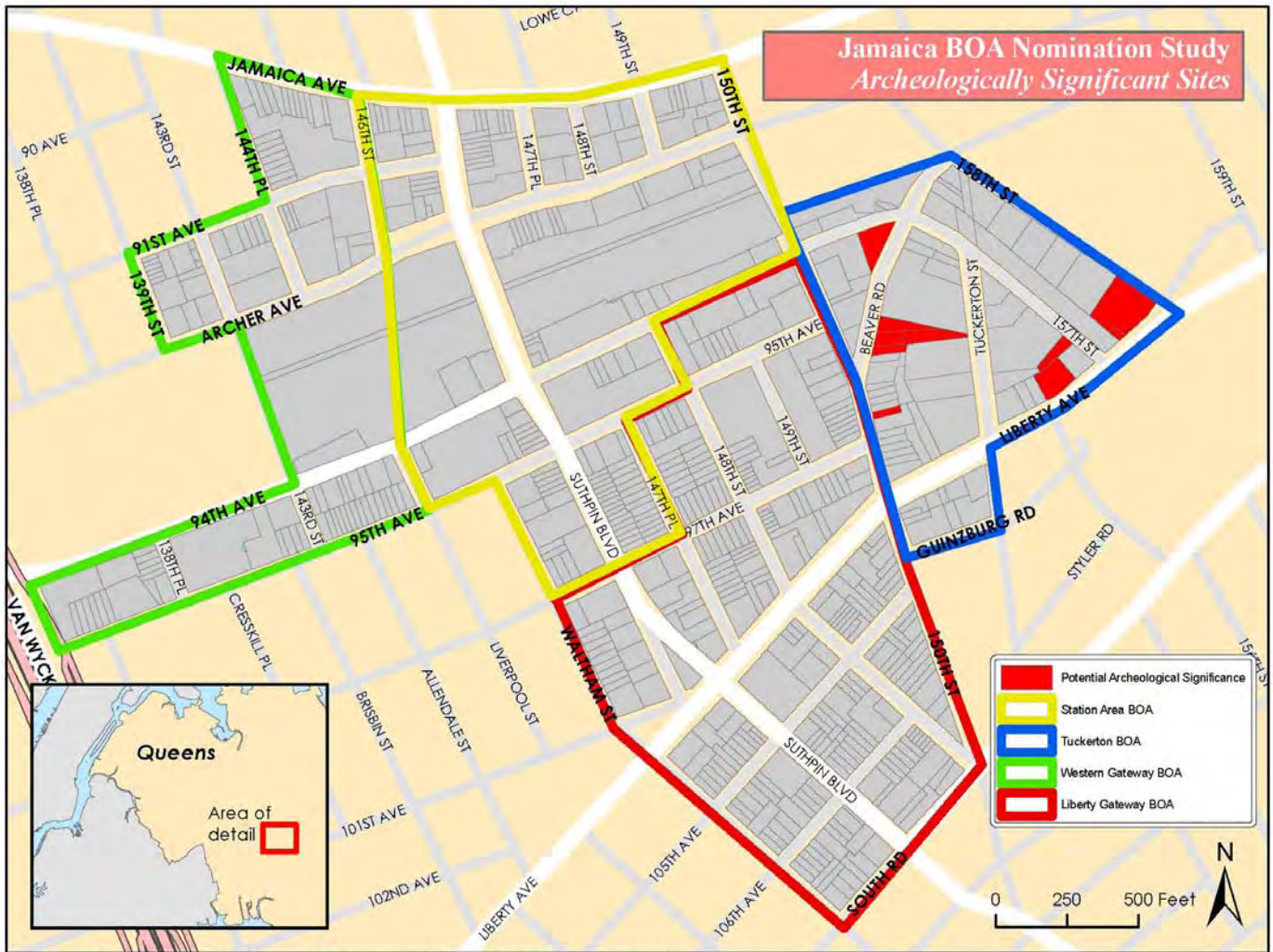
Jamaica is located in the eastern portion of the Borough of Queens in the City of New York. It lies approximately 2.5 miles west of the Queens County border with Nassau County. John F. Kennedy International Airport is approximately four miles to the south of Downtown Jamaica, with Jamaica Bay and the Atlantic Ocean beyond. The remainder of the Borough of Queens extends to the west of Jamaica up to the East River, the body of water that separates the Boroughs of Manhattan and Queens. Long Island Sound, separating New York State from Connecticut, is 7.1 miles north of Jamaica.

Queens is one of the five boroughs of the City of New York, along with the Bronx, Manhattan, Staten Island and Brooklyn, with each Borough also representing a State County (Bronx, New York, Richmond and Kings respectively). Queens is the eastern-most of the five boroughs and sits, geographically, on Long Island. The original Town of Jamaica is the County seat for Queens and, as a result, the major centers of Queens government are located in Downtown Jamaica and neighboring Kew Gardens, both part of the original town.

As Jamaica is a neighborhood in Queens and there exists both a Downtown Jamaica and a South Jamaica, the boundaries are unofficial and loosely defined by both residents and government. Several important boundaries cross Jamaica in an inconsistent manner, delineating things such as the Community Districts and state political districts. Queens County began as a series of towns, Jamaica being one of them, and included portions of Nassau County until 1870.

Jamaica's regional role and significance was originally as a passage for Native Americans moving east and west along modern-day Jamaica Avenue, which was a major east-west trail for the pre-European inhabitants. Jamaica later served as a market place where farmers from Long Island would sell their produce. This role as a regional commercial center would remain until the latter part of the 20<sup>th</sup> century when the trend toward suburban commercial development resulted in an exodus of major retailers from Jamaica.

**Figure 5 - Archeologically Significant Sites**



Source: Jamaica Plan Environmental Impact Statement Archeological Survey Phase 1A

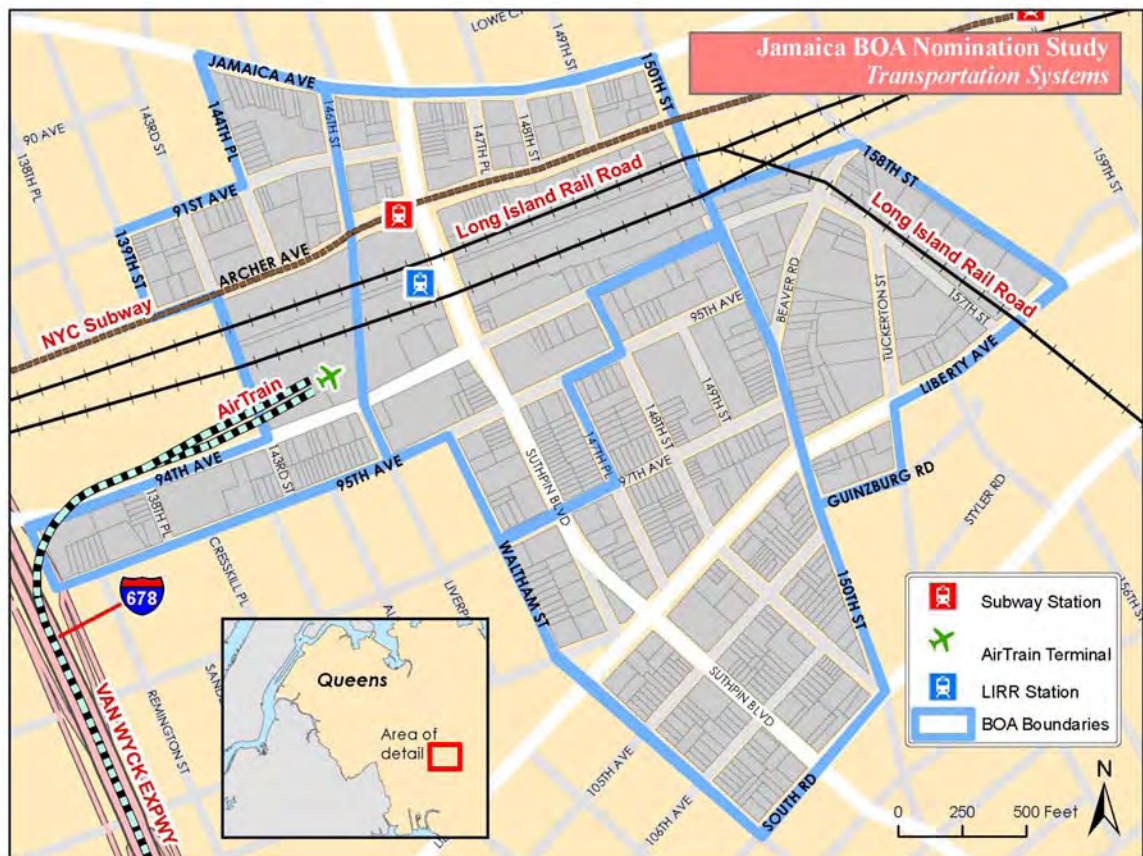
In the environmental impact assessment of the City of New York's rezoning in 2007, the archaeological significance of properties impacted by the rezoning was analyzed. This analysis, articulated in the Environmental Impact Statement for the initiative, revealed that the properties identified above were potentially archaeologically significant. No other properties in the Jamaica BOA Study Area were identified.



Jamaica's most prominent present-day regional role is as a major transportation hub for the region. Jamaica Station, located at the corner of Sutphin Boulevard and Archer Avenue, is the busiest train station on Long Island and the fourth busiest train station in the New York City metropolitan area behind Secaucus, Penn Station and Grand Central. In addition to the Long Island Railroad (LIRR) Station, the Port Authority of New York and New Jersey's AirTrain, which provides a direct rail link between New York's subway system, the LIRR and JFK Airport, has a station on Sutphin Boulevard. Furthermore, the E, J and Z lines of the New York City subway stop below Jamaica Station and continue to Jamaica Center, which is the easternmost stop for each of these subway lines.

The overwhelming abundance of transit and commuter rail options in Downtown Jamaica makes it an ideal location for transit-oriented development. There are ample opportunities for such development given the large number of under-utilized properties in close proximity to this infrastructure. The City of New York recognized these opportunities and sought to enhance them with the rezoning in 2008. Higher-density development is now permitted in the Station Area BOA.

**Figure 6 - Transportation Systems**

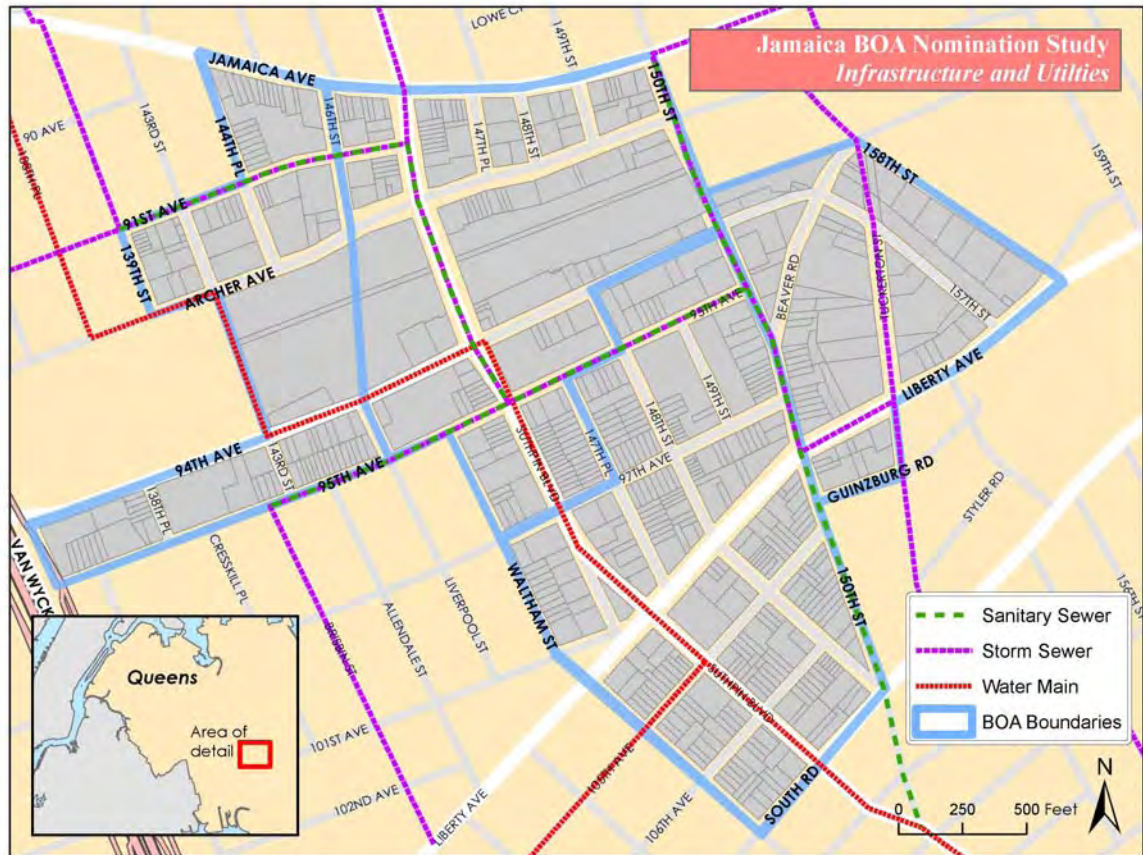


Jamaica is represented on the New York Metropolitan Transportation Council (NYMTC) through the city and state agencies that sit on the Council. These agencies include the New York State Department of Transportation, the New York City Department of City Planning and the New York City Department of Transportation. At least one project within the BOA Study Area, the realignment of the Archer Avenue-Sutphin Boulevard intersection, is presently funded partially through the NYMTC's Transportation Improvement Program (TIP). NYMTC is a regional Met-

ropolitan Planning Organization (MPO) whose primary function is the allocation of federal transportation funds.

Jamaica has a population density of approximately 22,000 per square mile. As such a densely populated urban area with a centuries-long history of settlement, its infrastructure supporting transportation, electric and gas and communication is fully developed. A pervasive infrastructure need at this time, due to the area's low-lying geography, is for increased storm drains to carry rain water to Jamaica Bay.

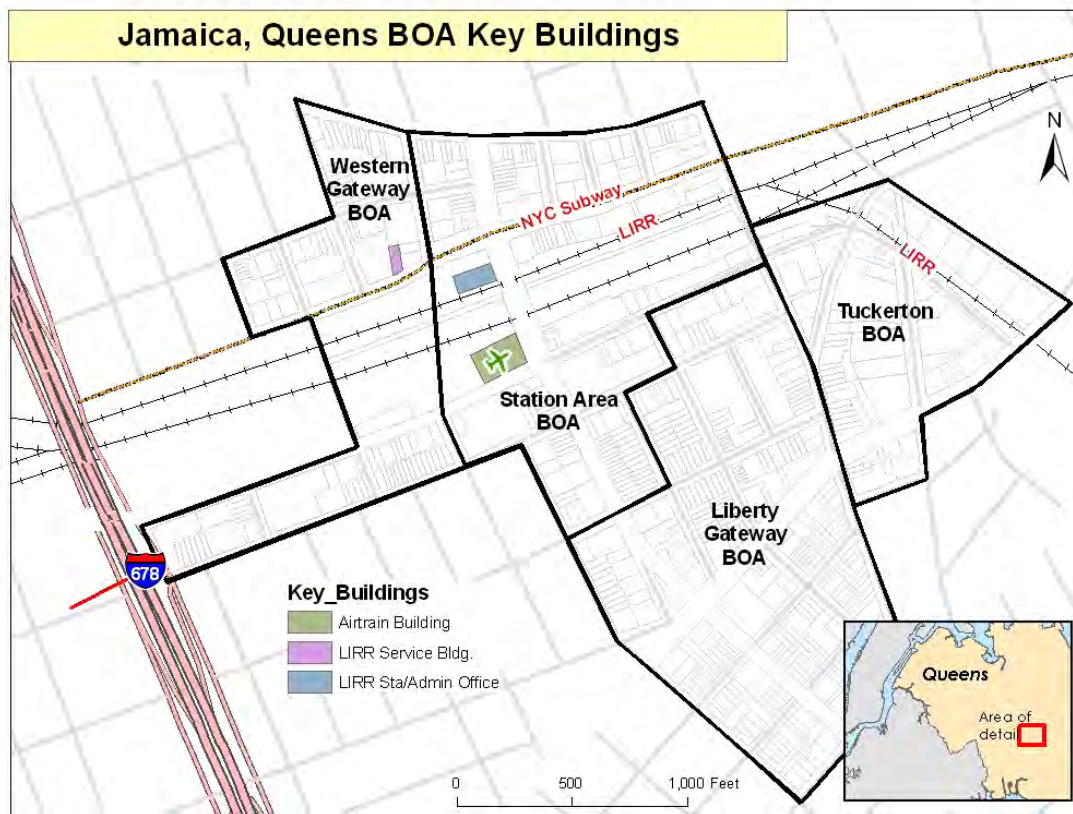
**Figure 7 - Infrastructure**



Again, viewing the BOA as a relatively small slice of an urban area, there is little in the way of natural resources. Of some interest is the Brooklyn-Queens aquifer, which lies under the BOA. However, this groundwater is neither potable nor used for industrial or other purposes in the BOA.



**Figure 8 – Key Buildings**



Key Buildings	Levels	Gross ft <sup>2</sup>	Original Use	Current Use	Condition	Ownership
AirTrain Building	6	300,000	Office/Station	Office/Station	Excellent (new)	PANYNJ
LIRR Service Bldg	2	4,000	LIRR	Office	Good	MTA
LIRR Sta/Admin	4	57,500	LIRR	Office/Station	Good	MTA

The Airtrain Station Building is a \$350 million investment by the Port Authority of New York and New Jersey. It is officially designated as an on-airport terminal at JFK Airport. It completed the establishment of Jamaica as an inter-modal transportation hub and catalyzed improvements to the entryways to the Long Island Railroad platforms and the LIRR platforms themselves, which is owned by the Metropolitan Transportation Authority (MTA). The two lower levels of the AirTrain building are high-ceiling, public spaces. The ground floor serves as an entryway to the AirTrain; the second floor is even with, and provides a pedestrian link to, both the AirTrain to JFK and to the adjacent LIRR train platforms. The upper four floors provide office space, primarily for the Port Authority.

The LIRR Service Building, owned by the Metropolitan Transportation Authority, is eligible for the national register of historic places.

The LIRR Station/Administrative Building is also eligible for the national register of historic places. This substantial building serves as the central office for operating the Long Island Railroad. The ground floor serves as a ticket office and waiting room; the upper three floors are offices for the LIRR/Metropolitan Transportation Authority.

## Demographic Trends

The Jamaica BOA Study Area is located in Community District 12 in Queens County.<sup>5</sup>

The area commonly referred to as “Downtown Jamaica” is made up of 13 census tracts. The area known as “Greater Jamaica” includes these 13 census tracts, as well as 24 additional census tracts. The area known as Downtown Jamaica is known more for its commercial and industrial uses than its residential areas, while Greater Jamaica itself includes surrounding residential areas.

The population of the City of New York has been steadily increasing over the past two decades. Jamaica has also seen an increase. When comparing Census figures from 1990 to 2000, one sees a city-wide population increase of 9.4%. Downtown Jamaica’s population increased 4.3% during this time, while Greater Jamaica’s population increased 10.0%. the table below illustrates this.

Table 2 - Population Change

Area	Population		% Change
	1990	2000	1990 – 2000
Downtown Jamaica	33,713	35,153	4.3%
Greater Jamaica	95,309	104,817	10.0
Queens	1,951,598	2,229,379	14.2
New York City	7,322,564	8,008,278	9.4

Source: 1990 and 2000 US Census of Population and Housing

As with New York City as a whole, immigration is the driving force behind the population increase in Jamaica. From 1990 to 2000, the percentage of Greater Jamaica residents that were foreign-born increased from 39 to 51 percent. The percentage was even higher (57%) for Downtown Jamaica in the 2000 Census.

Incomes in Jamaica were significantly lower than in the City as a whole in 1999. The table below illustrates a comparison of poverty rates and household income, utilizing income figures from 1989 and 1999 as collected by the Census.

Table 3 - Household Income

Area	Average Household Income (HHINC), 1999	HHINC % Change, 1989-1999	Poverty Rate 1999
Downtown Jamaica	\$42,577	-6%	22%
Greater Jamaica	43,199	-6	22
Queens	54,128	-2	15
New York City	58,505	+4	21

Source: 1990 and 2000 US Census of Population and Housing

The above table shows that residents of Jamaica continue to struggle economically. This is also reflected in an examination of the employment figures from the 2000 Census. Downtown Ja-

<sup>5</sup> The City of New York is geographically divided into Community Districts, represented by Community Boards, which are advisory bodies on issues concerning the public at large, such as public safety and zoning.

maica's unemployment rate of 13% was higher than that of both New York City (10%) and Queens (8%). The labor force participation rate for all three areas was 58%.

Employment in Downtown Jamaica is heavily concentrated in the government, health care and retail sectors. A study completed in 2005 that examined employment trends showed that over 77% of employment in Downtown Jamaica was in these three sectors. Industrial employment accounted for 10.5%.<sup>6</sup>

The Jamaica BOA Study Area is spread across five Census tracts, containing approximately 47 Census blocks. An examination of the Census blocks reveals that the Study Area had a population of 1,870 when the Census was taken in 2000. Of these residents, 790 (42.2%) identified themselves as black or African-American, 538 (28.8%) as Hispanic or Latino, and 337 (18.0%) as white.

The 2000 Census population in the Study Area was 50.9% female and 49.1% male. More than 56% of the population was younger than 35 years of age. Only 78 residents, or 4.2%, were 70 years of age or older. Nearly 29% of these 1,870 residents were under the age of 18 in 2000.

In 2000, there were 545 households in the Study Area, which translates to an average household size of 3.43. There were a total of 600 housing units in the Study Area in 2000 and, of these, 55 (9.2%) were vacant. Nearly 60% of these units, or 354, were renter-occupied.

The table below illustrates the differences between the City of New York's population, Queens County, Community Board 12 and the Study Area in the 2000 Census. As the chart shows, the BOA Study Area's population is younger than both the City and Queens. There is also a greater proportion of men in the population in the Study Area than in any of the other three. Clearly, because the vast majority of land within the Study Area is zoned for commercial and industrial use, it has very few residents, representing less than 1% of the population within Community Board 12.

Table 4 - Gender and Age

**Demographic Characteristics of Jamaica BOA Study Area\***

	<i>Total Population</i>	<i>% of City population</i>	<i>% Male</i>	<i>% Female</i>	<i>% under age 18</i>	<i>% 18 to 64 years</i>	<i>% age 65 and up</i>
<b>BOA Study Area</b>	1,870	0.02%	49.1%	50.9%	28.77%	64.81%	6.42%
<b>Community Board 12</b>	223,602	2.81%	45.8%	54.2%	29.30%	59.40%	11.30%
<b>Queens County</b>	2,229,379	28.02%	48.5%	51.5%	22.84%	64.46%	12.70%
<b>City of New York</b>	7,956,113	100.00%	47.5%	52.5%	24.23%	64.06%	11.71%

\*Sources: 2000 US Census of Population and Housing, Community Board 12

Home ownership is exceptionally high in the environs of the BOA. The 2000 Census showed that 51% of housing units were owner-occupied in Community Board 12. This differs substantially from the BOA Study Area, where only 191, or 35.0%, of the 545 housing units are owner-

<sup>6</sup> "Assessing Development Opportunities in the AirTrain Station Area, Jamaica", January 2005, 16.

occupied. This is much more consistent with the city-wide figure of 30.2%. In the entirety of Queens County, 42.8% of occupied housing units were owner-occupied as of the 2000 Census.

According to statistics compiled by the New York Department of City Planning in 2005, a significant majority of the land area in Community Board 12 (60.2%) is devoted to one-family and two-family residences. This is consistent with the low-rise suburban character of much of this area of Queens. This also contrasts substantially with the BOA Study Area, where only 11.5% of the land area is in residential use.

## Land Use History

Jamaica was one of several villages that made up the County of Queens prior to its incorporation into the City of New York in 1898. Jamaica was a seasonal home for Native Americans until the arrival of European settlers in the mid-seventeenth century. These settlers began utilizing the lands surrounding present-day Downtown Jamaica for agriculture. Downtown Jamaica became a hub for the exchange of produce and other items primarily for farmers who transported their goods west over what is today Jamaica Avenue.<sup>7</sup> Jamaica had a public market by 1693.

Jamaica grew gradually during the nineteenth century with Downtown Jamaica and Jamaica Avenue taking on more and more commercial significance. The area was attracting large numbers of Polish, Italian and Irish immigrants.<sup>8</sup> Real estate development accelerated rapidly in the 1920s and wider and wider use of the automobile made Jamaica and points further east on Long Island attractive locations for housing, particularly the common post-war single family detached variety. This is reflected in the existing housing stock which, outside of downtown Jamaica, is dominated by one- and two-family detached structures.

The rapid growth in population required increased investment in infrastructure and the Long Island Railroad responded by expanding and improving its operations in the area, constructing a train station on South Road. This was in addition to the existing station built in 1887 which remains today at the corner of Sutphin Boulevard and Archer Avenue. By 1943, 600 trains and 200,000 passengers per day were passing through it.

World War II caused significant change in Jamaica and ushered in a period of industrial development. Many manufacturing businesses sprouted in Jamaica to support the war effort. One example is Fairchild Aircraft Corporation, which built warplanes at a site near the intersection of Jamaica Avenue and Van Wyck Boulevard<sup>9</sup> in Jamaica.

The demographic characteristics of Jamaica were also changing as many African-Americans, formerly employed in agriculture in the Southeast, began immigrating to the area in the 1930s. Commercial activity continued to accelerate in this period with many of the biggest names in retail operating stores in Jamaica. By the mid-twentieth century Jamaica had a strong combination of industrial, commercial and residential land use with industrial development clustered near the railroad and Van Wyck Boulevard (now the Van Wyck Expressway).

Further land use changes resulted from a combination of an increasingly automobile-oriented culture and substantial economic dislocation in the 1960s and 1970s. Many retailers closed their Jamaica locations and moved to suburban communities. Some streets in Downtown Jamaica that

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<sup>7</sup> Jamaica History: The History of Land Development in Jamaica, Queens, Phil Garrett (no date).

<sup>8</sup> "Historic Jamaica: A Downtown Newsletter", July 1979, pp. 1-2.

<sup>9</sup> Long Island Press, September 25, 1941, p. 14.

had been lined with stores, such as Liberty Avenue, became dominated by auto- and transportation-oriented uses such as parking lots, junk yards and waste transfer stations. This problem was exacerbated by excessively permissive zoning in Downtown Jamaica that allowed for uses that had been prohibited in most of the rest of the City, thus making Jamaica a haven for such operations. Disinvestment in Downtown Jamaica continued into the 1980s.

The 1990s and early 2000s saw a shift, particularly with the construction of the AirTrain terminal on Sutphin Boulevard and substantial private investment in new housing in Jamaica. Several higher density residential development projects began in this period. Underutilized or abandoned industrial properties such as the Merkel Meat Packing plant on the corner of Sutphin Boulevard and 94<sup>th</sup> Avenue attracted attention from private developers due to their close proximity to the AirTrain terminal and a robust real estate market in the City.

This latest round of change in Jamaica has pushed brownfield redevelopment to the forefront of considerations for the future of the community. As the local and national economy continue to shift away from manufacturing, particularly in urban areas, more of these properties will be examined for other uses. Fortunately both government and the private sector have made great strides in the past decade to develop a more sophisticated suite of programs and techniques for such projects.

The advantages and challenges of the BOA have been well-documented through the pre-nomination process and previous planning efforts and vision studies, but some are worth summarizing and re-visiting from a land use/market perspective for the purposes of providing a framework for initial strategic site selection.

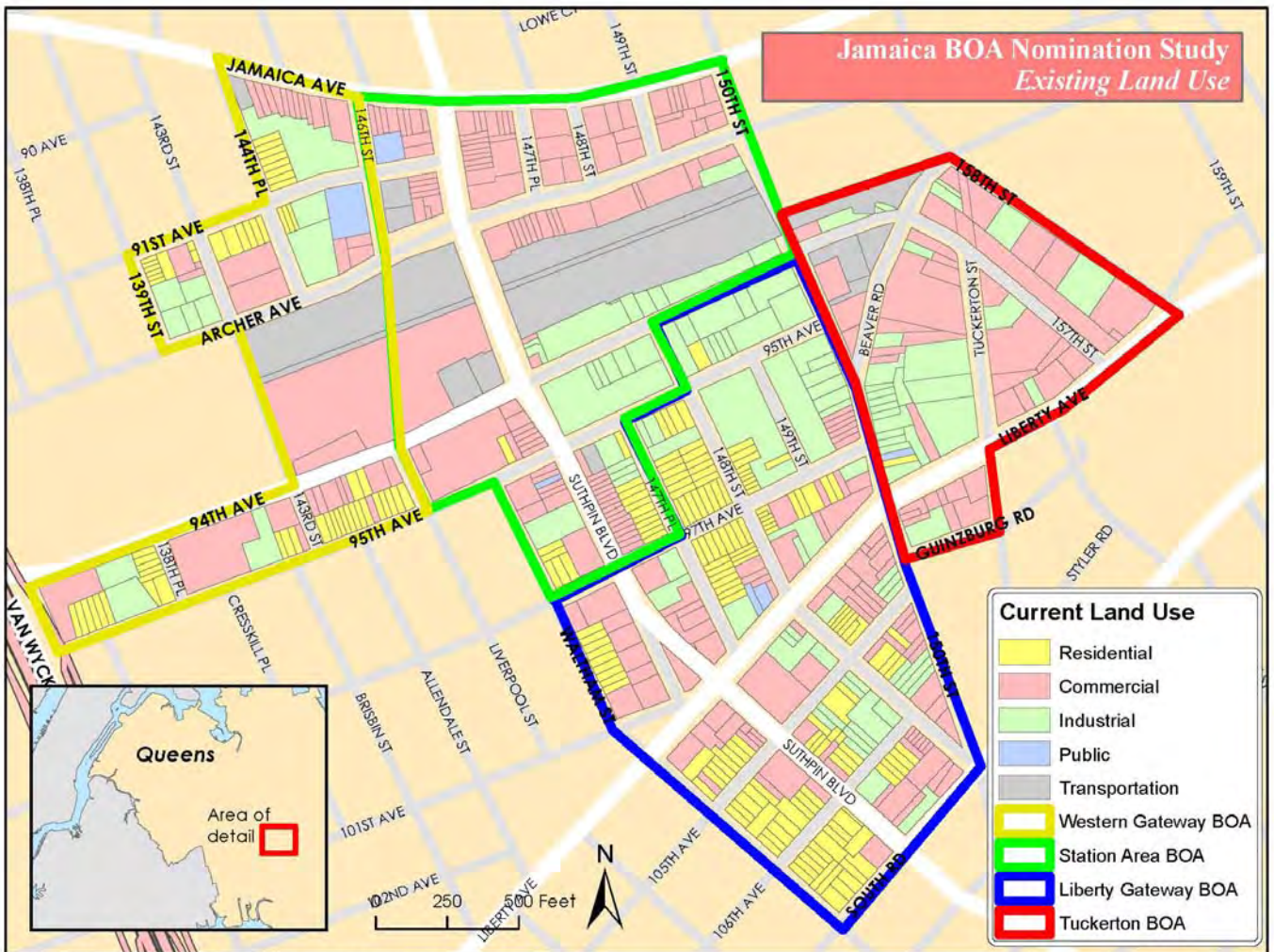
### **Key Elements of Land Use and Zoning in the BOA Study Area**

- As a whole, the Study Area has superior access to transit
- For the majority of the Study Area there will be a significant increase in density
- Substantial areas, particularly in the Station Area, were re-zoned from M (industrial) to C (commercial) and allowed for significant increases in density and building height
- The Study Area is bordered by four existing economic development drivers (Jamaica Hospital, Elmhurst Dairy, FDA, York College)
- Properties within the Study Area are generally small and in disparate ownership
- The majority of the key redevelopment sites within the Study Area are in private ownership
- Some lots represent infill opportunities but most require additional land assemblage for larger scale redevelopment
- There are a mix of industrial, auto-related and other uses which often are correlated with environmental conditions on some sites that are likely to complicate redevelopment

The overall BOA Study Area is 132 acres in size. Land use in the Study Area is predominantly industrial and commercial. The first map below illustrates the breakdown of land uses within the Study Area. It is an area largely in transition from historically industrial to mixed-use (which is called for in the latest visioning exercise by GJDC). Retail and, to a lesser extent, residential is the perceived, current market strength. Within the approximately forty blocks of the BOA Study Area, over 120 tax lots have been flagged as “underutilized” by past surveys. The lots are modestly sized from 2,000 – 65,000 square feet. The second map below illustrates the paucity of open space in the BOA, with only a single green space planned and none extant.



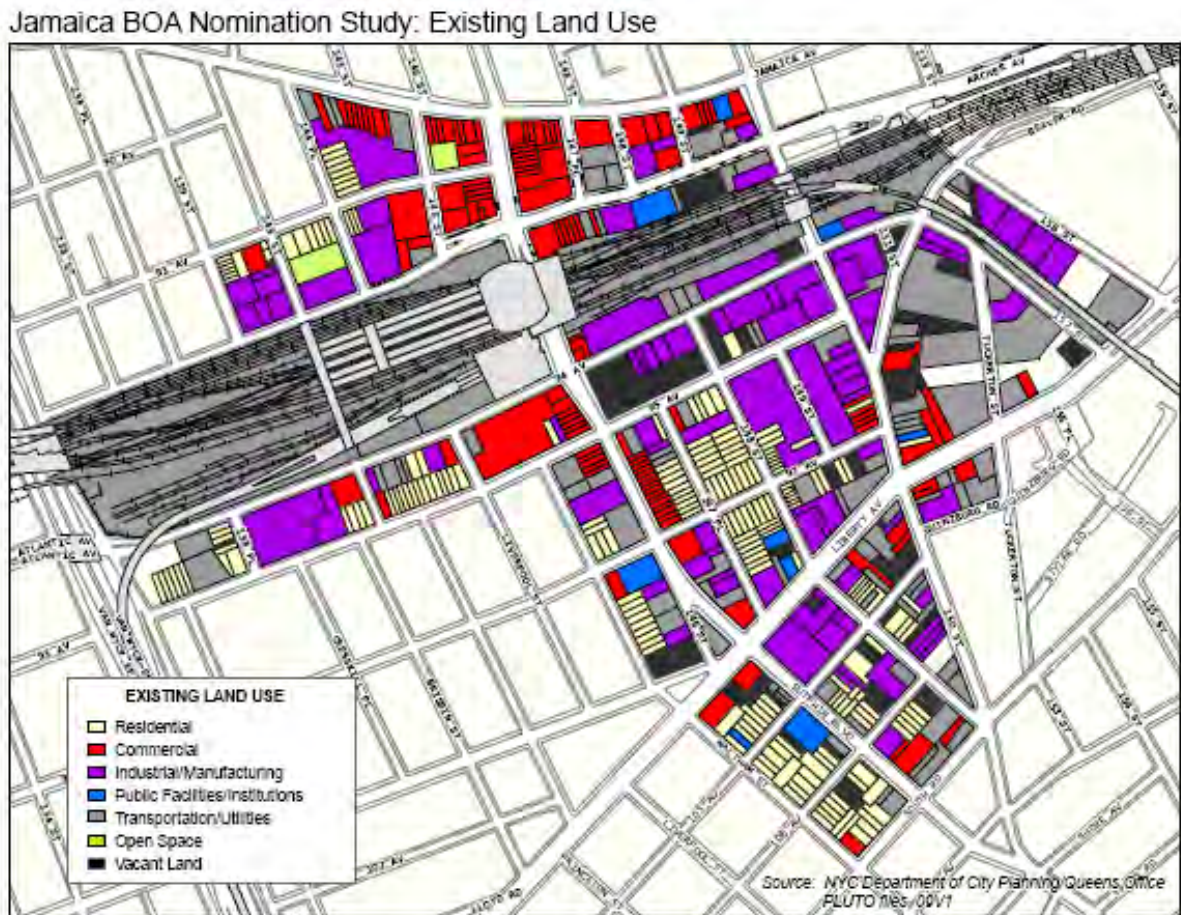
**Figure 9 - Existing Land Use (2006)<sup>10</sup>**



Source: 2006 Greater Jamaica Development Corporation property survey

<sup>10</sup>Map generated through a property-by-property survey performed by Greater Jamaica Development Corporation in 2006. This survey was regarded as generally more accurate than land use data maintained by the City of New York, as the survey is the result of a visual inspection of the properties from the lot line and reflects GJDCs substantial institutional knowledge of historical activities on these properties. However, given elapse of time since its completion, a more recent land use map provided by the NYC Department of City Planning is provided for comparison as Figure 10 on the following page.

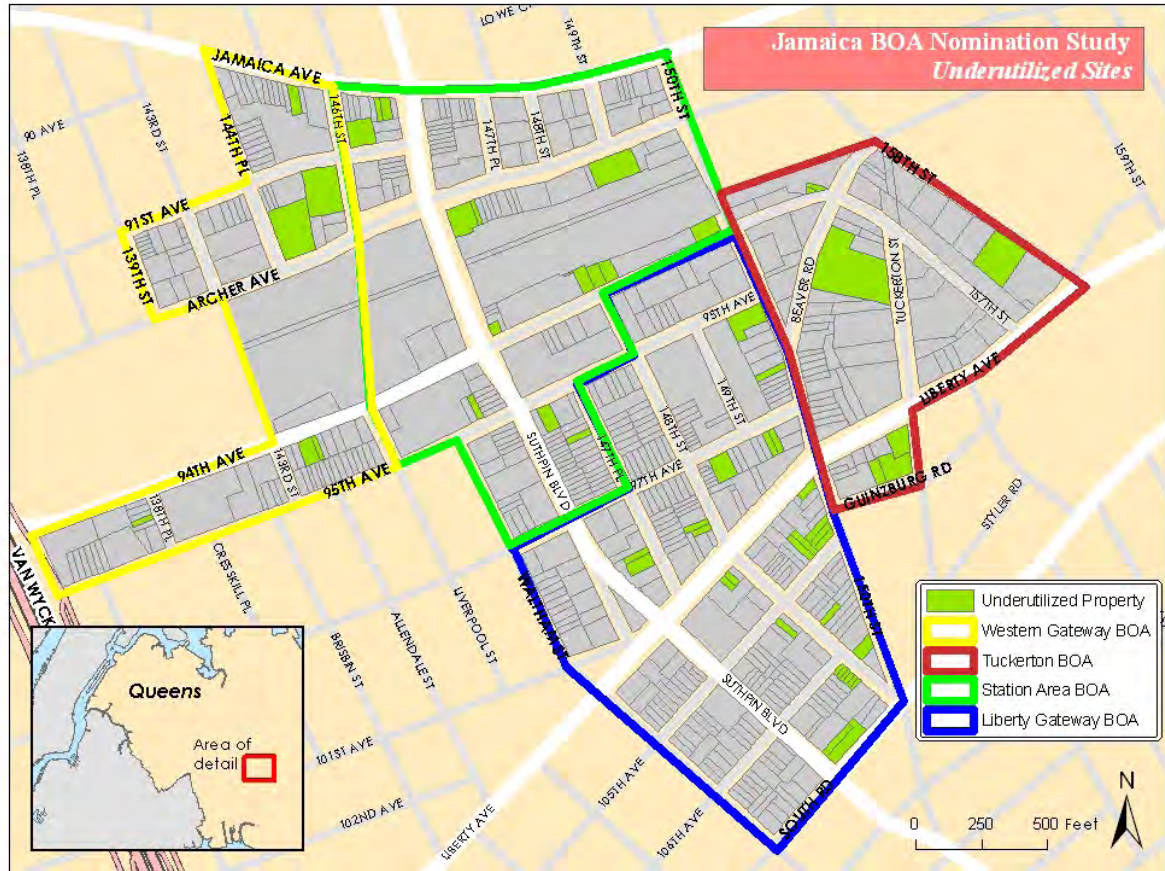
**Figure 10 – Existing Land Use (2009)<sup>11</sup>**



<sup>11</sup>The Department of City Planning generated this map of the Study Area at GJDC’s request in November, 2009. It is nearly identical to the 2006 Land Use map in Figure 9 with the exception of the added categories of “vacant” and “open space.” The former Merkel meatpacking plant at the corner of Sutphin Boulevard and 95<sup>th</sup> Street is accurately identified as vacant as of 2009 in the City map.



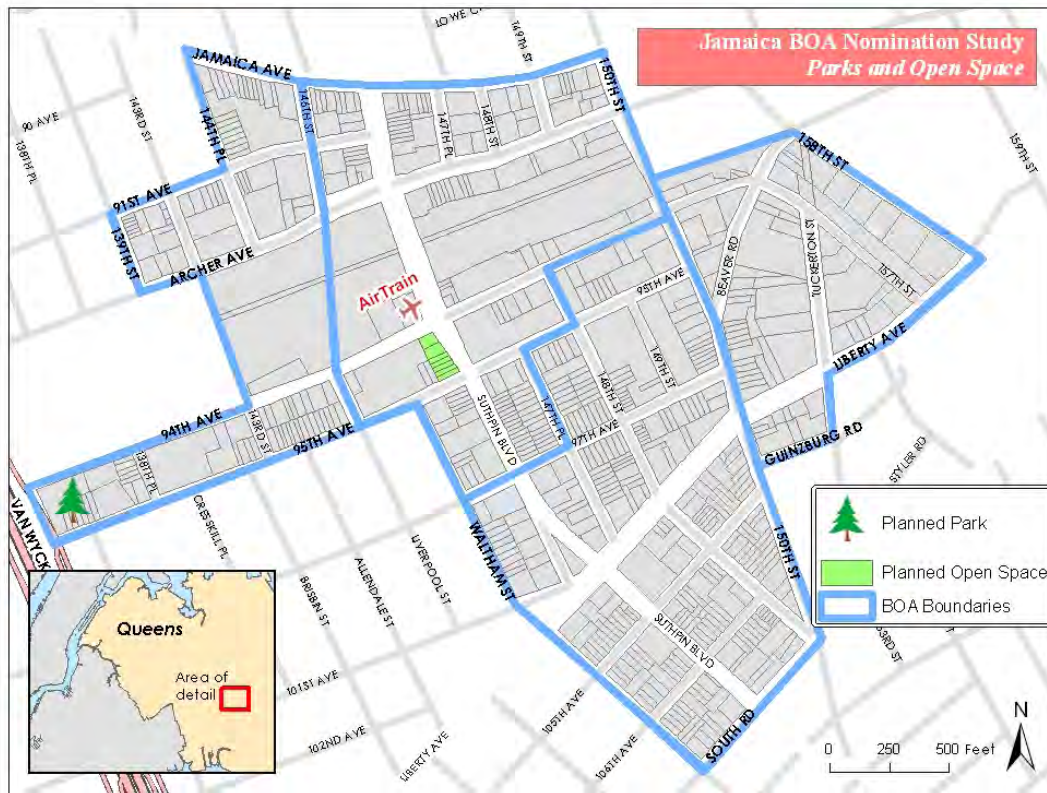
**Figure 11 - Underutilized Sites<sup>12</sup>**



Source: 2006 Greater Jamaica Development Corporation property survey

<sup>12</sup> The Underutilized Sites map was generated from a property-by-property survey of the Jamaica BOA Study Area by Greater Jamaica Development Corporation in 2006. The survey was performed prior to the neighborhood rezoning in 2007 and, therefore, does not include a consideration of the change in maximum permitted floor area ratios for many of these properties. This survey also does not automatically regard brownfields as “underutilized” since the former may refers to environmental conditions while the latter refers to current use. For example, a site on which there was a DEC-registered spill several years ago may not be under-utilized today.

**Figure 12 - Parks and Open Space**



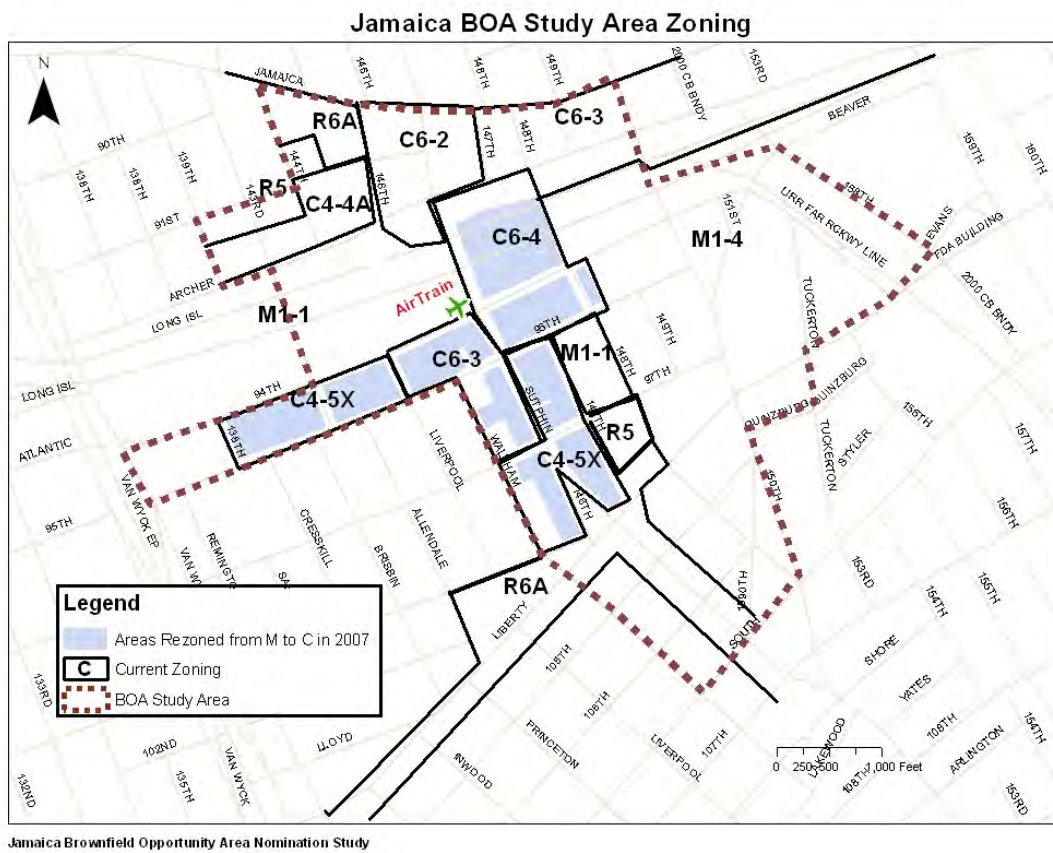
There are no parks or open spaces within the Jamaica BOA Study Area. The community outreach process for the BOA Nomination Study revealed a desire by residents for additional recreational opportunities, but such parks development and its maintenance needed to address the potential for public safety issues. A park is planned for the extreme western edge of the Area as part of the Atlantic Avenue Extension Project. Open space, under the project name of “Signature Park,” is planned for the space fronting on Sutphin Boulevard between 94<sup>th</sup> and 95<sup>th</sup> Avenues to support hospitality and retail redevelopment associated with the JFK AirTrain transportation hub. One of the largest parks in Jamaica, the Rufus King Park, is located adjacent to the Study Area on Jamaica Avenue.

Despite changes in commuting patterns, significant investments in infrastructure and the evolving socio-economic character of Jamaica in the past several decades, the Study Area's zoning remained largely unchanged since 1961. The vast majority of the property within the BOA Study Area was zoned M1-1 during this period. This use category permits light manufacturing, retail commercial and certain recreational uses, but it has the lowest limit of development density of any of the City's designations for industrial use.

In 2006, the City of New York proposed a re-zoning and other land use regulatory changes for a large area of Jamaica and Southeast Queens, which includes the Jamaica BOA Study Area. This proposal is termed the "Jamaica Plan." These changes were approved through the City of New York's Uniform Land Use Review Procedures (ULURP). The rezoning plan was adopted in September of 2007 and took effect in February of 2008.

The Jamaica Plan re-designated approximately 25% of the property within the BOA from industrial to commercial use, primarily in the Station Area. It also increased permitted commercial redevelopment densities from Floor Area Ratios of 1:1 to a minimum of 4:1 and to 12:1 on the blocks opposite the JFK AirTrain station. Clearly, development densities under the pre-existing zoning were low for an area with such abundant access to mass transit and commuter railroad service. The City's rezoning therefore created the opportunity to address the underutilization of properties in Downtown Jamaica, especially the BOA Study Area.

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The new zoning regulations reclassified a significant amount of the per-existing M1-1 zone as commercial or residential. The table below indicates the breakdown of the BOA Study Area by zoning category in the new zoning.

Table 5 - Zoning

<u>Zoning Designation</u>	<u>Number of Lots</u>	<u>Total Area (Sq. Ft.)</u>	<u>Percentage</u>
<u>C6-2</u>	<u>127</u>	<u>510,877</u>	<u>14.6%</u>
<u>C6-3</u>	<u>53</u>	<u>347,963</u>	<u>10.0%</u>
<u>C6-4</u>	<u>25</u>	<u>271,687</u>	<u>7.8%</u>
<u>M1-1</u>	<u>39</u>	<u>252,208</u>	<u>7.2%</u>
<u>M1-4</u>	<u>202</u>	<u>1,494,284</u>	<u>42.7%</u>
<u>R4</u>	<u>32</u>	<u>106,915</u>	<u>3.1%</u>
<u>R5</u>	<u>72</u>	<u>186,830</u>	<u>5.3%</u>
<u>R6A</u>	<u>66</u>	<u>326,035</u>	<u>9.3%</u>

Note: block 9998, lots 52, 65, 70 are three very large lots that fell between the proposed M1-4 and C6-4 zones. For those lots, their total lot areas were divided between the two zones. All other split lots were simply assigned to one of the proposed zones they intersected. Lot area data is from the City of New York's Department of City Planning.

The definition of a brownfield in New York State's Environmental Conservation Law is "any real property, the redevelopment or reuse of which may be complicated by the presence or potential presence of a contaminant."<sup>13</sup> Under this definition, brownfields dominate the Jamaica BOA Study Area. Every property that received an "e" for hazardous materials under the City of New York's Jamaica Plan in 2007 is regarded as a brownfield under this definition.



**Figure 14 – Brownfields in Jamaica BOA<sup>14</sup>**

### **Brownfields in Jamaica BOA Study Area**



<sup>14</sup> A total of 223 properties within the Jamaica BOA Study Area were identified as brownfields during the course of the Study. Properties that displayed one or more of the following characteristics were so identified: assigned an “e” designation by the City of New York, displayed signs of contamination based on field observations, identified as brownfields in previous property surveys including Phase 1 Environmental Site Assessments, site of a DEC-registered spill, use historically associated with contamination.

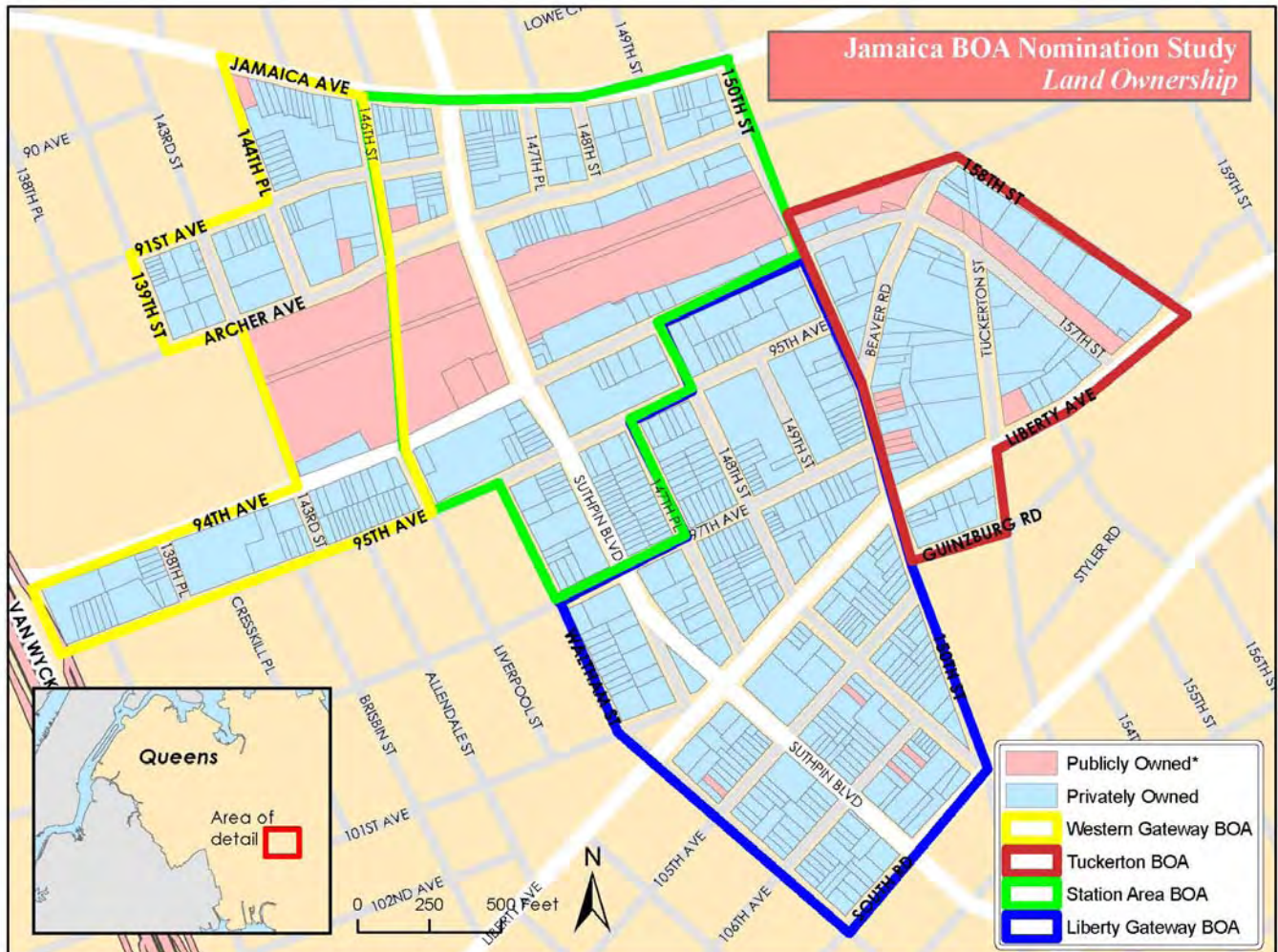
## **Land Ownership Pattern**

A significant number of buildings within the BOA Study Area are publicly owned or owned by public authorities and private utilities. Among the larger property owners in the Study Area are the Port Authority of New York and New Jersey; the Metropolitan Transit Authority, which operates the Long Island Railroad; Consolidated Edison; and the City of New York. Approximately 19.3 acres in the BOA Study Area are publicly owned, which represents 21.5% of the total acreage in the Study Area, excluding the rights-of-way of the streets and sidewalks.

While the total acreage owned by public entities appears high, the actual number of properties that are publicly owned is relatively low. Only 30 of the 617 properties, or 4.9%, are publicly owned in the Study Area. This difference between publicly owned acreage and publicly owned properties is the result of several comparatively large parcels under the control of the Long Island Railroad, primarily the mainline right-of-way and a primary spur right-of-way that run through the Tuckerton and Station Area BOAs.



**Figure 15 - Land Ownership Map**



## **Existing Plans**

### **Jamaica Plan (2006)**

The Jamaica Plan is an initiative spearheaded by the City of New York to enact several changes to the zoning text and zoning map for an area covering 368 blocks of Jamaica, Queens. The Plan includes other elements, such as the disposition of city-owned property and some street demapping. The main objectives of the Plan are to facilitate the redevelopment and increased economic vitality of Downtown Jamaica while protecting residential areas from overdevelopment. The Plan was approved through the City's Uniform Land Use Review Process (ULURP) and was certified in early 2008.

The Jamaica Plan seeks to address two separate but equally difficult issues for Jamaica. The first stems from a discrepancy between the zoning classification for some of the low-rise portions of the neighborhood and the development style. The concern is that the residential development pressures in the City will disrupt the character of these areas.

The City is also interested in facilitating transit-oriented development (TOD) where such opportunities exist and the areas adjacent to the commuter rail and subway stops in Jamaica are perceived to have zoning that does not allow for the full implementation of such TOD initiatives. Therefore, the new zoning will "upzone", or increase allowable floor area ratios (FAR), in the areas adjacent to these transit stops. In addition, the new zoning will seek to encourage mixed use development.

### **Commercial and Industrial**

Beyond the stated objective of encouraging mixed use development in some areas, the Plan seeks generally the expansion of Jamaica's Central Business District (CBD). The Plan also increases the allowable FAR for industrially-zoned areas, such as Tuckerton Triangle. The zoning changes are also expected to result in a more smooth transition between the residential and industrial areas.

### **Brooklyn-Queens Aquifer Feasibility Study (1999)**

The City of New York's Department of Environmental Protection commissioned a study in 1992 that explored the future use of the Brooklyn-Queens Aquifer as a source of potable water to supplement New York City's upstate reservoirs and to provide relief from the flooding caused by rising groundwater levels in the area. The Study calls for the construction of two regional water treatment plants to remove iron, manganese and volatile organic compounds from the groundwater. It surmises that any relief from groundwater flooding provided by the pumping of groundwater to the treatment facilities would only be temporary.

### **Vision for Jamaica Center (2000, updated 2004)**

In 1999 GJDC commissioned a study to develop a planning strategy that would build upon the existing assets in Downtown Jamaica to facilitate an economic and environmental transformation in the community. The study, known as the "Vision for Jamaica Center" brought together a variety of stakeholders on a project steering committee which included state, federal and local elected officials, government agencies, community groups and public authorities.

The development strategy outlined by the study would occur in three phases over the course of approximately 20 years. The first phase would bring infrastructure, open space and urban design improvements to Downtown Jamaica. Phase 1 also identifies priority redevelopment sites on which would be constructed a corporate-commercial center, office building, public parking facility and a retail market. Phase 2 involves construction of an office building on Sutphin Boulevard, as well as streetscape and roadway design improvements. The final phase calls for another parking facility, the redesign of 95<sup>th</sup> Avenue as a boulevard and construction of two more office buildings with ground floor retail east of Sutphin Boulevard between Jamaica Avenue and Archer Avenue.

The “Vision for Jamaica Center” recognizes the out-dated zoning in the area and calls for a re-zoning to encourage the kinds of development outlined. The Study is also brimming with transportation and streetscape design recommendations, as well as design guidelines for buildings to be constructed in the three-phase plan. Most importantly, the “Vision” includes an implementation strategy that identifies the roles of the various stakeholders and sources of funding.

In 2004, GJDC commissioned an update of the “Vision for Jamaica Center.” The events of September 2001 caused a significant shift in the market for some of the community redevelopment activities and projects identified in the original study. The update specifically addresses the negative impacts on the market for commercial office space and airport-related facilities in Jamaica. It also identifies some positive developments, including the recent establishment of the Sutphin Boulevard Business Improvement District (BID) and the opening of the US Food & Drug Administration regional laboratory.

### **New York Metropolitan Transportation Council Regional Transportation Plan (2005)**

By federal statute, each metropolitan area in the United States must be represented by a regional organization to perform transportation planning duties and to make decisions regarding the spending of federal transportation funds. The entity in the New York metropolitan area with these responsibilities is the New York Metropolitan Transportation Council.

The New York Metropolitan Transportation Council Regional Transportation Plan was released in 2005 with a 25-year time horizon and, though it is a transportation plan, its goals and objectives are broad. The Plan seeks improvement of the regional economy, the environment and quality of life in the region, as well as expansion of transportation access. The Plan attempts to further these objectives by addressing issues such as:

- the costs of maintaining the existing transportation system
- populations with special needs such as the elderly
- the necessary coordination between land use and transportation decision-making
- air quality
- safety
- use of emerging technologies to increase efficiency of the system
- modal choice

## **PlaNYC 2030 (2007)**

In response to growing speculation and concern regarding the City of New York's population growth and the potential quality of life and environmental impacts of such growth, Mayor Michael Bloomberg released a long-term plan for the City known as "PLaNYC 2030." The plan is divided into six sections: Land, Water, Transportation, Energy, Air and Climate. Each section proposes a list of long-term goals and recommendations, supported by statistics and policy analysis.

### *Land*

Use sustainable development approaches to reuse brownfields and underutilized properties for housing, open space and mixed use, transit-oriented development

Of particular note is the plan's strategy for expediting the remediation and reuse of brownfields. The plan seeks to create a new city office that would have similar powers as the State of New York regarding oversight of remediation activities. It also proposed the development of a database that would document past uses on properties city-wide. The brownfields portion of the plan, in practice, is heavily reliant on the willingness of the State of New York to deliver the powers sought by the City, as well as to reform existing state brownfields programs in a manner consistent with the City's objectives.

### *Water*

PLaNYC 2030 addresses several long-term water issues that the City of New York has struggled with for decades. The plan proposed continued vigilance in seeking the most appropriate remedies for CSO-related problems and preservation of New York City's Watersheds. The plan also makes many "green" recommendations, including an expansion of the number of "green roofs" in the City and a general greening of parking lots, both of which can have significant positive impacts on the amount of storm water flowing to the sewer system.

### *Transportation*

Recognizing the potential impacts on transportation from the projected increase in the City's population, PLaNYC 2030 calls for numerous upgrades to the existing vehicular and transit network. These include expansion of commuter rail options, continued work on existing projects such as the Second Avenue subway and additional ferry and bus services lines. The plan also seeks to influence modal choice by instituting fees for those who drive into certain parts of Manhattan during the busiest times and by promoting the use of bicycle as a commuting option.

### *Energy*

There is an increased awareness of the City's aging energy delivery system. The plan uses a summary of the 2006 Queens blackout to introduce the energy portion of the plan, which details a series of efforts to reduce the demand on the City's energy infrastructure, increase capacity and upgrade existing infrastructure. Putting City government in the lead, the plan seeks to reduce energy consumption through a variety of measures, including the use of "green building" standards and the launching of an energy awareness campaign.

## *Air*

Much of the air quality initiatives in PLANYC 2030 focus on emissions from vehicles and finding ways to reduce them or make them cleaner. The plan assumes that implementation of its transportation recommendations will have a significant benefit for air quality in the City. It also recommends using incentives, such as toll discounts and reductions in sales taxes, to encourage people to invest in energy efficient vehicles such as hybrids.

## *Climate Change*

One of the more unique elements of PLANYC 2030 is its treatment of climate change issues. Rarely does a municipally-based plan address global climate change concerns and the impacts of such change on the municipality. The plan makes three recommendations regarding global climate change: creation of an interagency task force to protect the City's infrastructure, development of site-specific protection strategies in key neighborhoods, launching of a citywide strategic planning process to address climate change adaptation.

## **Jamaica Bay Watershed Protection Plan (2007)**

The Jamaica Bay Watershed Protection Plan is an outgrowth of a legislative initiative in the New York City Council to examine the feasibility of protection measures for the Bay. The Plan was authored by the New York City Department of Environmental Protection. It calls for several measures aimed at decreasing the flow of untreated storm water directly into the Bay.



**Four Brownfield Opportunity Areas:  
A Strategic Approach to Sections 3.2 Through 3.5**  
**3.2: Inventory and Analysis**  
**3.3: Existing Land Use and Zoning**  
**3.4: Brownfield, Abandoned and Vacant Sites**  
**3.5: Strategic Sites**

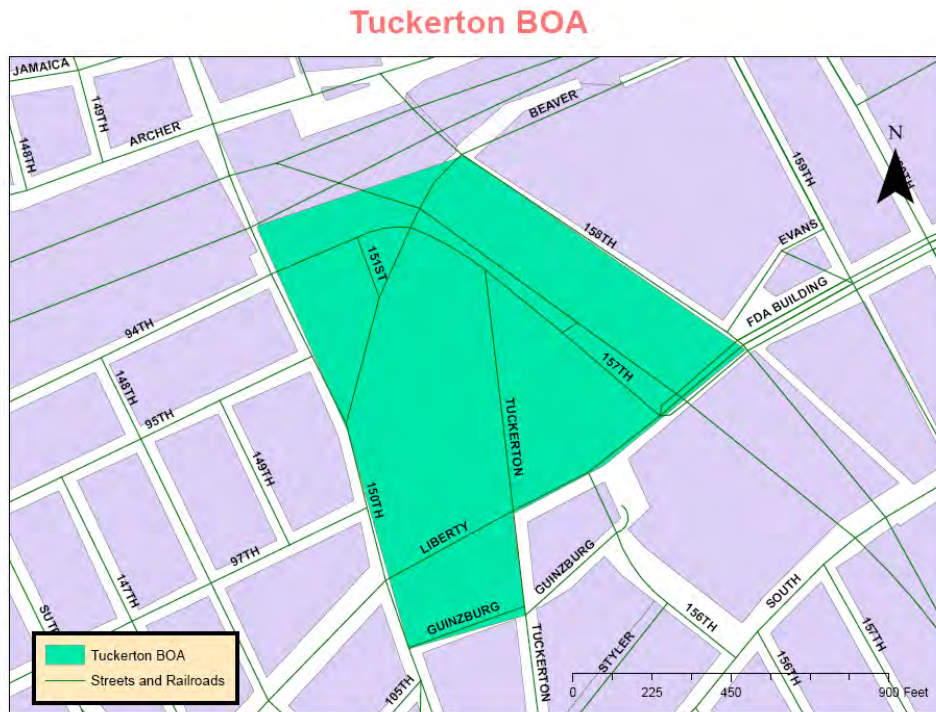
An intensive long-term approach is required to achieve the redevelopment objectives in the Study Area given the locations of the brownfields, the size of the properties and the large number of property owners. Redevelopment in the Study Area must also accommodate a wide range of uses and functions. This Nomination Study will therefore present Sections 3.2 through 3.4 for four separate and distinct Brownfield Opportunity Areas, one after the other. This will permit redevelopment in staged intervals and the flexibility to target and shift redevelopment efforts based on changing market conditions and opportunities for private investment in the Study Area and to more easily obtain public support.

The proposed BOAs discussed below per sections 3.2, 3.3 and 3.4 are, in order:

- 1) Tuckerton BOA**
- 2) Station Area BOA**
- 3) Western Gateway BOA**
- 4) Liberty Gateway BOA**

### 3.2(A) Inventory and Analysis - Tuckerton BOA

The Tuckerton BOA contains the highest concentration of brownfields and industrial uses in the Jamaica BOA Study Area. From the perspective of environmental quality, redevelopment of this area would further the objectives identified by both the Jamaica BOA Advisory Committee and the State of New York through its brownfield redevelopment programs. Junk yards, abandoned vehicles and trash-strewn lots are commonplace in this area. Pedestrians are discouraged from venturing due to the crumbling sidewalks and generally dangerous atmosphere.

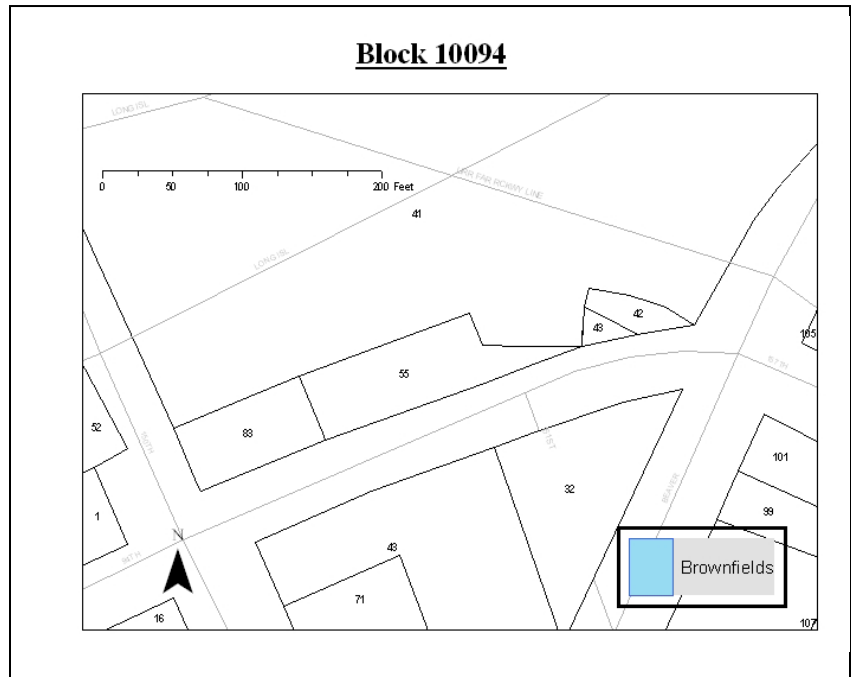


#### Brownfields in Tuckerton BOA

The Tuckerton BOA contains the tax blocks 10095, 10107, 10108, 10109, 10110 and a portion of tax block 10094. What follows is a block-by-block description of the brownfields in the Tuckerton BOA. As the following information demonstrates, the Tuckerton BOA has the highest concentration of brownfields among the four BOAs within the Jamaica Study Area.

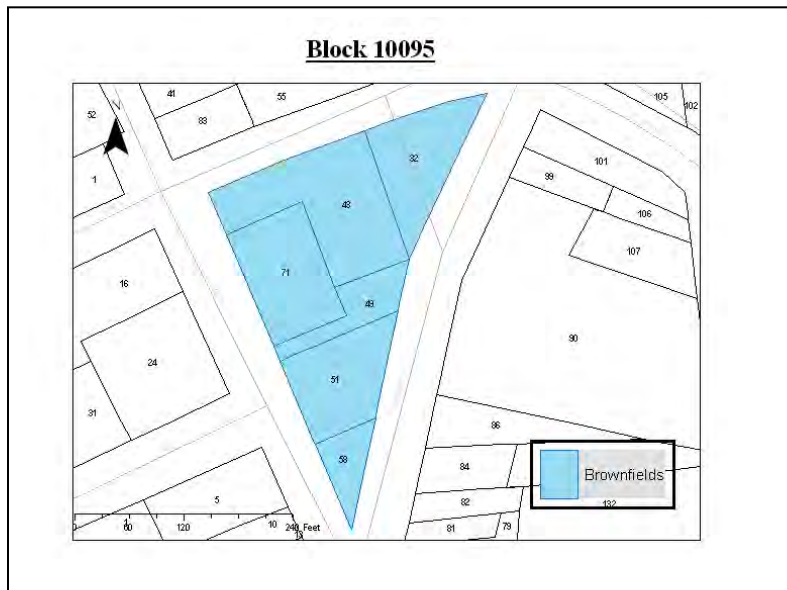
## Block 10094

Lot	Present Use
41	LIRR
42	Manufacturing
43	Manufacturing
55	Manufacturing
83	Office



The portion of Block 10094 that lies within the BOA Study Area has no brownfields.

## Block 10095



Lot	Present Use
32	Parking
43	Offices
49	Warehouse
51	Mixed Use
58	Auto Repair
71	Warehouse

### Lots 32 and 43

Reason for identification as a brownfield: **site of DEC-registered spill.** This property, in addition to the adjacent Lot 43, is used as a parking and operational facility for a bus/transportation company. The properties were acquired by the present owner from an Ohio-based transportation company in 1972.

### Lot 49

Reason for identification as a brownfield: **“e” designation by the City of New York.** The owner of this property acquired it in 1972 from an Ohio-based transportation company. In 2003, the owner obtained a permit to change the use from a factory to an auto repair shop. In 1998, the owner was cited by the City for unsafe conditions on the property, due to a partially collapsed wall and roof. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 51

Reason for identification as a brownfield: **“e” designation by the City of New York.** In 1998 the owner applied for a use change on the property, from a food manufacturing facility to an auto repair shop. No records of spills or enforcement actions by environmental regulatory agencies were found.

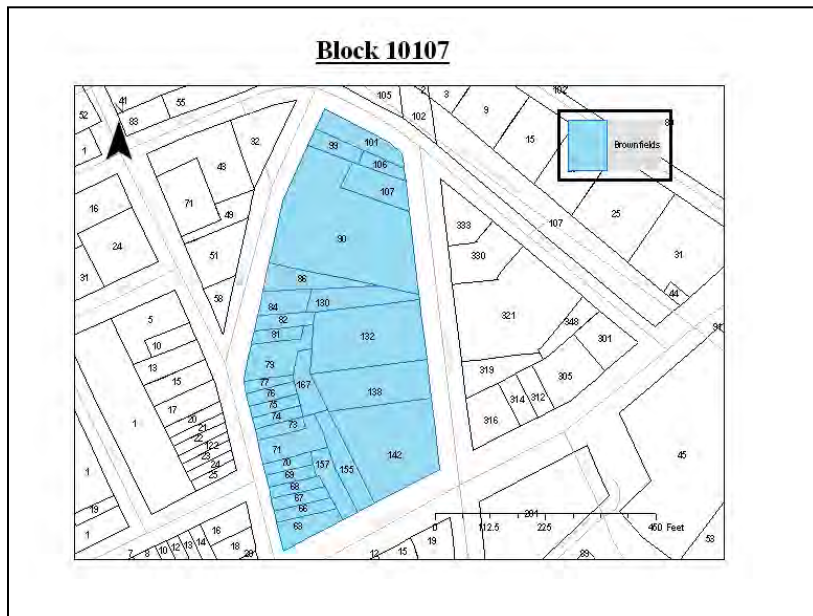
### Lot 58

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is an abandoned former Gulf gas station. While a business called “CC Precision Welding” has a present business address at the location, no business activity is occurring there and the building is advertised for lease by the property owner. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 71

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a food processing facility, producing smoked fish, with an accompanying small retail store. No records of spills or enforcement actions by environmental regulatory agencies were found.

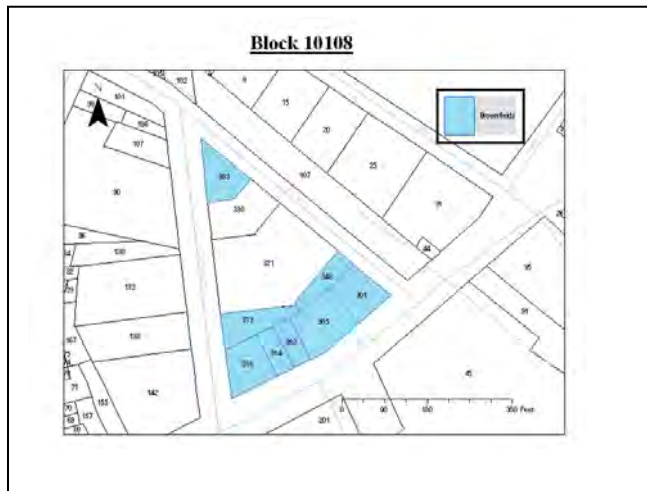
## Block 10107



The entire tax block 10107 has been identified as a brownfield for the purpose of this study due to the character of the uses, the number of DEC-reported spills and field observations. Of the 30 tax parcels on the block, 10 carry “e” designations. Some of the properties appear to be abandoned and rubbish is strewn across some of the lots, along the sidewalks and in the street. It is not uncommon to see abandoned vehicles on Tuckerton Street.

Lot	Present Use
56	Junk Yard
63	Retail
66	2 family detached
67	Church
68	Parking
69	Parking
70	Parking
71	Warehouse
73	Parking
74	Parking
75	Parking
76	Parking
77	Parking
79	Parking
81	Vacant
82	Vacant
84	Junkyard Auto
86	Warehouse
90	Vacant Land
99	Manufacturing
101	Food Processing
106	Parking
107	Vacant
130	Vacant Land
132	Junk Yard
138	Junk Yard
142	Junk Yard
155	Restaurant
157	Auto Repair
167	Junk Yard

## Block 10108



Lot	Present Use
301	Junk Yard
305	Junk Yard
312	Junk Yard
314	Junk Yard
316	Parking
319	Parking
321	Manufacturing
330	Manufacturing
333	Parking
348	Office

### Lots 301, 305 and 348

Reason for identification as a brownfield: **“e” designation by the City of New York.** These three properties contain a junk yard operating under the name of Do-Rite Salvage Auto Glass. It has been operating as such for at least the past 17 years. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 305

Reason for identification as a brownfield: **“e” designation by the City of New York.** It appears that this property is an extension of the junk yard located just to the east, as it has the same owner and the signage is similar. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lots 312, 314 and 319

Reason for identification as a brownfield: **“e” designation by the City of New York.** These three parcels appear to be the home of one junk yard called “Three Sons Auto Glass.” All three properties have the same owner. No records of spills or enforcement actions by environmental regulatory agencies were found.

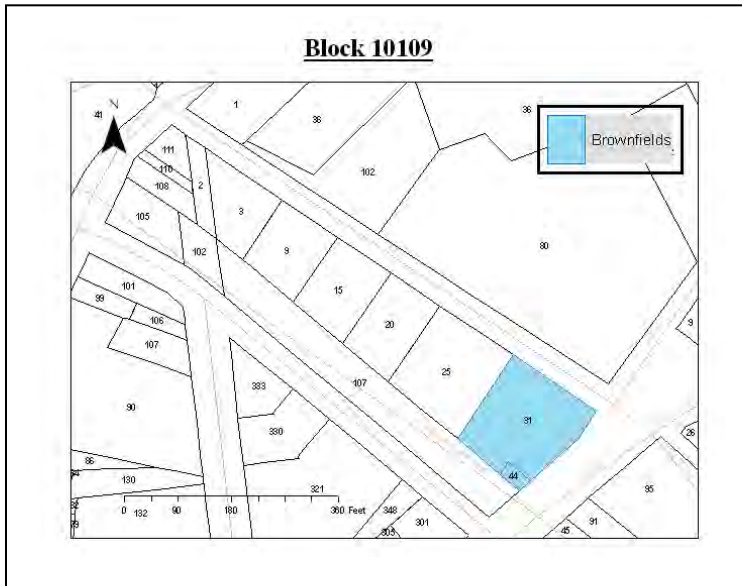
### Lot 316

Reason for identification as a brownfield: **“e” designation by the City of New York and site of DEC-registered spill.** This property was seized by the City of New York through foreclosure proceedings in 1993. It is now a parking lot. A petroleum spill of unknown quantity was reported to NYSDEC on the property in 1999.

### Lot 333

Reason for identification as a brownfield: **site of DEC-registered spill.** A spill of some abandoned drums of waste oil was reported on this property in 2006. It is presently a parking lot.

## Block 10109



### Lot Present Use

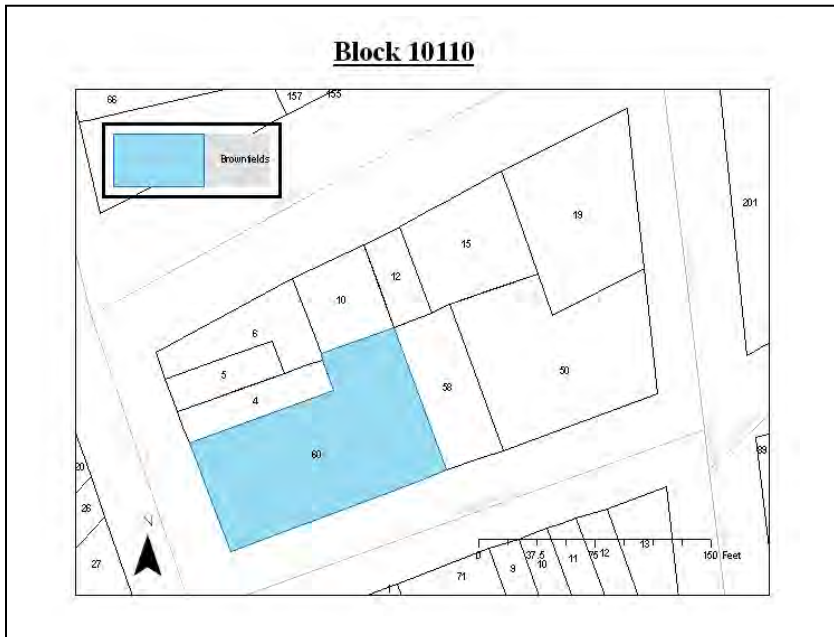
2	Junkyard
3	Warehouse
9	Manufacturing
15	Office/Warehouse
20	Office/Warehouse
25	Manufacturing
31	Parking
44	Parking
102	Parking
105	Parking
107	Parking
108	Manufacturing
110	Manufacturing
111	Junkyard

### Lots 31 and 44

Reason for identification as a brownfield: **“e” designation by the City of New York.** These properties form a commercial parking lot and are owned by DC Realty Group. The New York City Economic Development Corporation (NYCEDC) sold them in 1999 after acquiring them from the City of New York. No records of spills or enforcement actions by environmental regulatory agencies were found.



## Block 10110



Lot	Present Use
4	Auto Repair
5	Auto Repair
6	Retail
10	Auto
12	Outdoor Storage
15	Auto
19	Auto
50	Parking
58	Transportation
60	Waste Removal

### Lot 60

Reason for identification as a brownfield: **site of DEC-registered spill.** This property is used by a trash hauler. A small two-story building on the lot is used for offices. The large adjacent yard is used by the hauler for container storage.

### 3.3(A) Existing Land Use and Zoning – Tuckerton BOA

Land use within the Tuckerton BOA is almost exclusively industrial and commercial. Figures 9 and 10 (Existing Land Use) on pages 62 and 63 respectively demonstrates this. There is only one residential property within the boundaries, which is located on 150<sup>th</sup> Street near its corner with Liberty Avenue. Commercial auto-oriented uses line Liberty Avenue while the industrial uses are mostly located within the block bounded by 150<sup>th</sup> Street, Tuckerton Street, Beaver Road and Liberty Avenue.

The entirety of Tuckerton BOA is located within a M1-4 manufacturing zone and is also within the Downtown Jamaica overlay district. The area was previously zoned M1-1. The difference is substantial in that the maximum FAR is now doubled to 2.0 for manufacturing and commercial uses. Among the impacts of the overlay district on the underlying zoning are as-of-right permitting of parking garages of 150 spaces or fewer, non-commercial art galleries, museums, colleges and universities, libraries, ambulatory health care facilities and a wide array of retail and service establishments.

If one excludes the LIRR property underneath the elevated tracks that run through the Tuckerton BOA there is a total of seven publicly owned properties. Six of these are former residential lots owned by the New York City Department of Housing Preservation and Development. Several properties in the most northerly portion of block 10107 are commonly owned, including the largest parcel. Despite this, the majority of the properties are individually owned and this will further complicate site assembly efforts here.

### **3.4(A) Abandoned, Vacant and Underutilized Properties – Tuckerton BOA**

Despite the neglect in the Tuckerton BOA, there are very few abandoned properties. This is likely the result of a combination of factors. The M-1 zoning permits light industry, such as food processing, assembly and fabrication, and industrial support facilities, such as warehouse and transportation uses. Special “performance standards” promulgated by the Department of City Planning allow some noxious uses, among them a large number of auto junkyards. Tuckerton is surrounded by a low-income residential neighborhood and adjacent to a four year academic institution, York College.

All of the properties within the Tuckerton BOA are now underutilized when one examines the development potential. The industrial area is within easy reach of JFK Airport and major highways and, like Jamaica itself, is mid-way between Long Island and Manhattan, making it an excellent site for transshipping of all kinds. With the recent rezoning, which up-zoned the area from M1-1 to M1-4, permits floor area ratios can increase from 1.0 to 2.0 generally and from 2.4 to 6.5 for community facilities. Virtually none of the existing uses in the Tuckerton BOA approach these new maximum FARs. Even excluding consideration of the increased FARs, seven sites are currently underutilized in the Tuckerton BOA. See Figure 11, Underutilized Sites, on page 64.

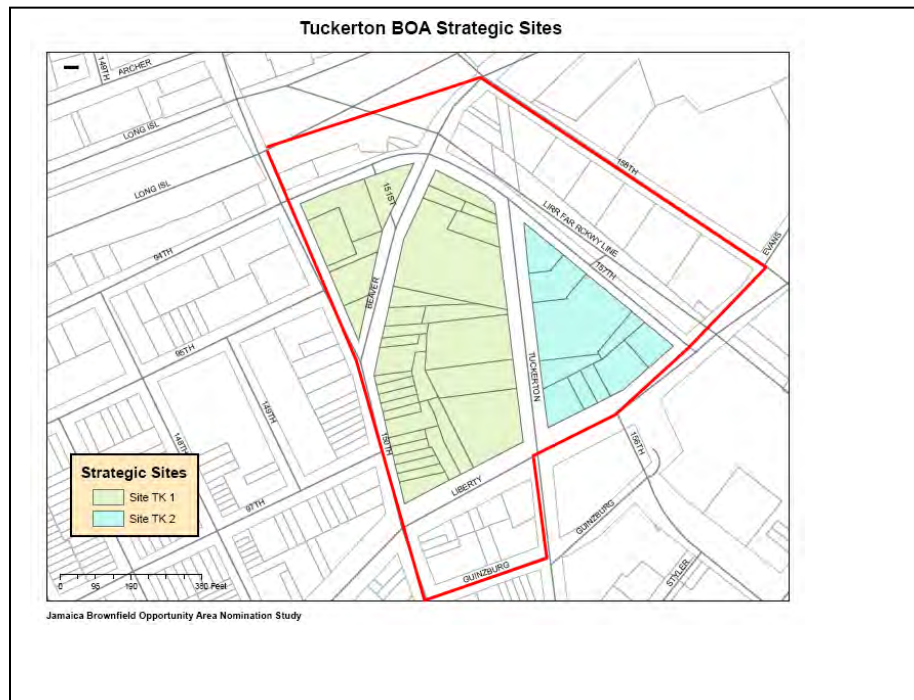
### **3.5(A) Strategic Sites - Tuckerton BOA**

Tuckerton Site 1:        Blocks 10107, 10095

Blocks 10107 and 10095 have been combined to form Site TK 1. In order to redevelop these two blocks as one site, a large number of small properties will need to be assembled. While such assembly would prove very challenging, redevelopment of this site would result in a dramatic improvement to both environmental and visual quality in the area. This site is regarded as the most heavily contaminated in the entire Jamaica BOA Study Area.

Uses on the site range from a poultry slaughterhouse to makeshift parking lots to junk yards. Portions of this site are also potentially archaeologically sensitive, as described in the City’s Environmental Impact Statement for the Jamaica Plan. A redevelopment scenario has been developed for Site TK 1 and is included in Section 2. The recommended reuse is industrial and/or large-scale retail. The characteristics of the reuse will ultimately derive from the demands for these kinds of uses at the time of redevelopment and the degree to which the site is fully assembled.

Infrastructure needs particular to Site 1 of the Tuckerton BOA, which was selected as a “next step” development site under Section 3.7, Summary Analysis, Findings and Recommendations, can be found in Appendix D, Summaries of Consultant Products, Executive Summary 1, Area/Infrastructure Analysis.



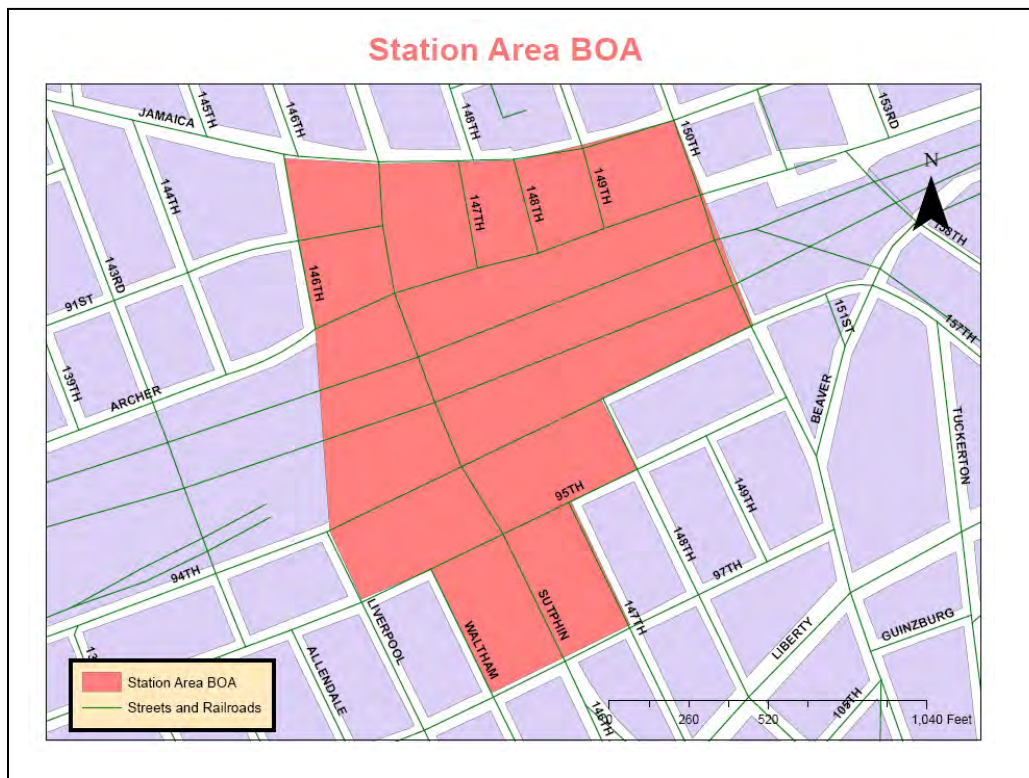
#### Tuckerton Site 2: Block 10108

This site consists of all of the properties on triangular block 10108, which is bounded by Liberty Avenue to the south, Tuckerton Street to the west and 157<sup>th</sup> Street to the east. The elevated LIRR runs along the east side of 157<sup>th</sup> Street, which is used extensively for on-street parking by the businesses on the block.

These businesses include junk yards which front on Liberty Avenue and degrade the visual quality of the area. There is also a gate manufacturing company whose lot spans the entire length of the block with an entrance on both 157<sup>th</sup> Street and Tuckerton Street. Like the adjacent Site Tuckerton 1, some properties on TK 2 were identified as potentially archaeologically sensitive in the City's EIS for the Jamaica Plan. The site is strategic because it is bounded by both the LIRR and Liberty Avenue, two important transportation corridors. There is also a high likelihood of contamination on Tuckerton 2.

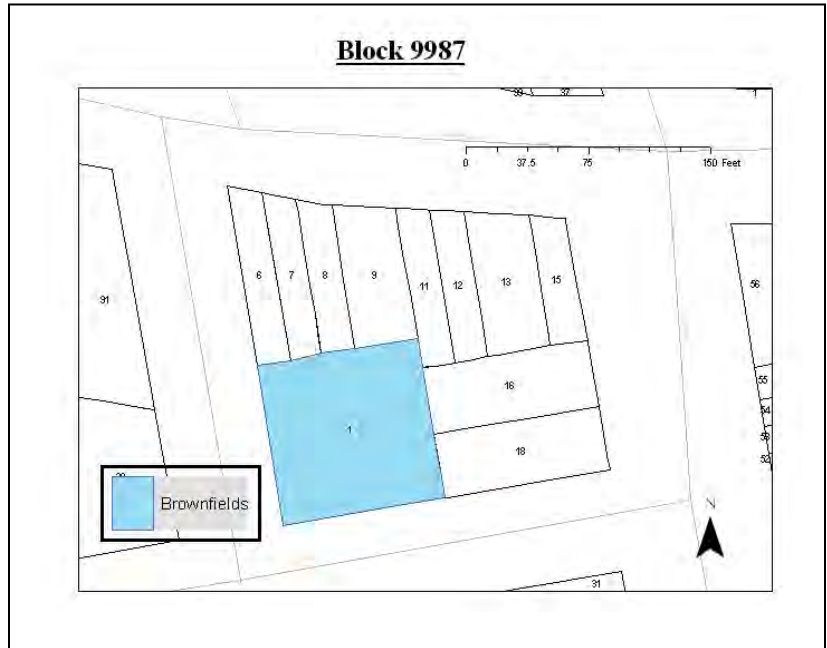
### 3.2(B) Inventory and Analysis – Station Area BOA

Greater Jamaica Development Corporation, the City of New York, the Metropolitan Transportation Authority and other stakeholders have brought many resources to bear over the past decade to make the Station Area the cornerstone of revitalization efforts in Downtown Jamaica. Several millions of dollars in infrastructure improvements have been completed or are in the pipeline and the impacts of these projects, while substantial, remain only a part of the long-term vision for this area. There remain significant environmental, quality-of-life and economic development challenges for the blocks surrounding the transportation hub.



## Block 9987

Lot	Present Use
1	Community Center
6	Retail
7	Retail
8	Retail
9	Residential
11	Retail
12	Retail
13	Retail
13	Retail
15	Retail
15	Retail
16	Retail



16	Retail
18	Retail
18	Retail
18	Retail

### Lot 1

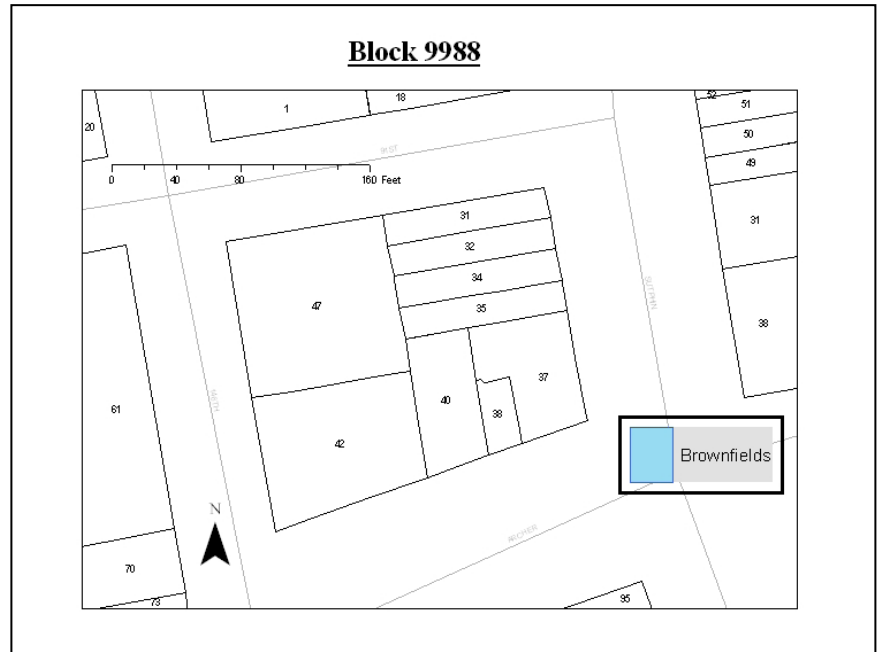
Reason for identification as a brownfield: **“e” designation by the City of New York.**

This is a bingo hall owned by 146-01 91st Avenue Realty Corp. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 9988

Lot      Present Use

31	Retail
32	Retail
34	Retail
35	Retail
37	Retail
37	Retail
37	Retail
37	Retail
38	Retail/Office
40	Retail
42	Office Space
47	Office Space

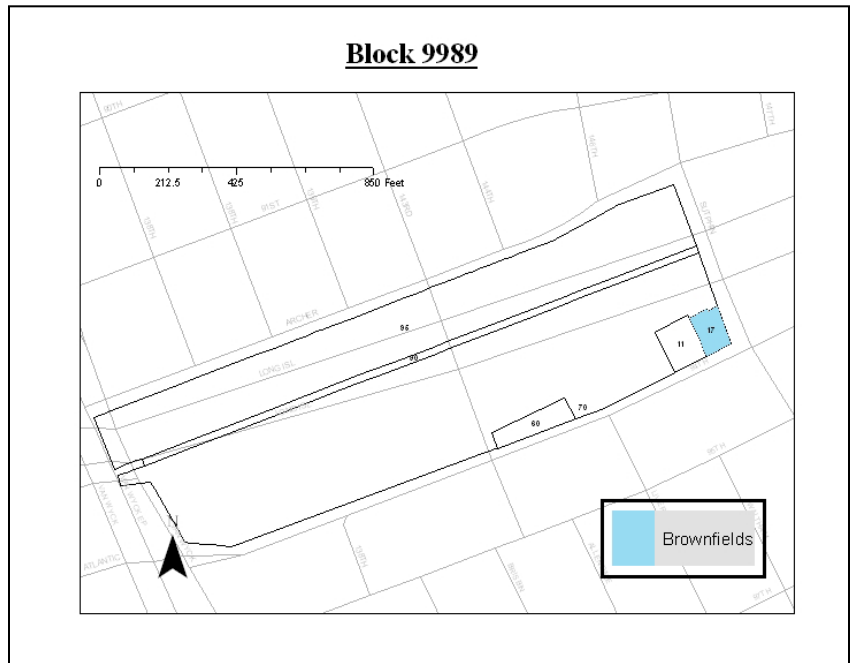


There are no brownfields on Block 9988.



## Block 9989

Lot	Present Use
11	Transportation
17	Transportation
60	Parking
70	Vacant
90	Transportation
95	Transportation



### Lot 17

Reason for identification as a brownfield: **site of DEC-registered spill**

The AirTrain Station, owned and operated by the Port Authority of New York and New Jersey, sits on this and several other parcels on this block.

## Block 9993



### Lot Present Use

1	Auto Repair
3	Office Space
18	Mixed
20	Retail
22	Mixed
23	Mixed
24	Mixed
25	Mixed
27	Retail
28	Retail
29	2 Family Detached

### Lot 1

Reason for identification as a brownfield: **“e” designation by the City of New York.** An auto repair shop operates on this property. The building housed a factory prior to 1990, however, the type of manufacturing that occurred inside the building at that time is unknown. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 3

Reason for identification as a brownfield: **“e” designation by the City of New York.** This property has office space for various operations, including the New York City Department of Finance. A portion of the property was used for previously for meat packing and storage. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 18

Reason for identification as a brownfield: **“e” designation by the City of New York.** A nightclub operates on the first floor of this two-story building. Upstairs are likely one or more residential units. The building was formerly owned by a meat packing company and has also operated as a restaurant. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 20

Reason for identification as a brownfield: **“e” designation by the City of New York.** A store-front legal services provider occupies this one-story building. The building has been used as an auto repair garage in the past. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 22

Reason for identification as a brownfield: **“e” designation by the City of New York.** This three-story building has a butcher equipment store on the first floor and residential units on the two upper floors. The building was formerly owned by a meat packing business. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 23

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a restaurant with residential units on the upper two floors. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 24

Reason for identification as a brownfield: **“e” designation by the City of New York.** The storefront on the first floor of this three-story building has been a locksmith and a laundromat in the past. The upper two floors are residential dwellings. Several housing code violations have been documented in the past for this property, though no records of spills or environmental enforcement actions have been found.

Lot 25

Reason for identification as a brownfield: **“e” designation by the City of New York.** This three-story building has a restaurant on the first floor and residential units on the upper two floors. In the late 1970s and early 1980s it was owned by a meat packing company. The property was leased from 1967 to 1972 by Humble Oil and Refining Company, a successor of Standard Oil. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 27

Reason for identification as a brownfield: **“e” designation by the City of New York.** The first floor of this three-story building is occupied by a bodega, while the two upper floors are residential units. No records of spills or enforcement actions by environmental regulatory agencies were found.

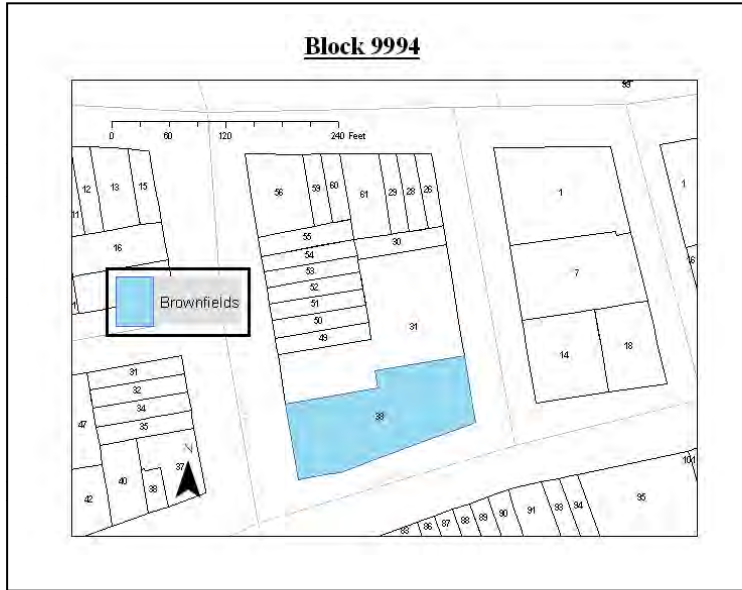
Lot 28

Reason for identification as a brownfield: **“e” designation by the City of New York.** The store in this one-story building sells cash registers and scales. Previous owners include a meat packing business. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 29

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a residential property that has been cited in the past for having more than the allowable number of dwelling units on the property. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 9994



Lot	Present Use
26	Commercial
28	Residential
29	Residential
30	Office Upstairs
31	Commercial Office
38	Office Upstairs
49	Residential
50	Retail Upstairs
51	Office Upstairs
52	Vacant Downstairs
53	Office Space
54	Retail
55	Vacant Upstairs
56	Office Upstairs
59	Residential
60	Residential
61	Retail

### Lot 38

Reason for Identification as a Brownfield: **result of previous GJDC property survey.** A previous (2005) property survey conducted by GJDC identified this site as a brownfield. The property has been home to a wide variety of commercial uses in the past, including auto repair. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 9995

Lot      Present Use

1      Mixed

7      Parking

14      Auto Repair

18      Parking



### Lot 1

Reason for identification as a brownfield: **“e” designation by the City of New York.** The building has two stories, with several retail storefronts on the first floor and offices upstairs. The property is owned by K J L Realty Company. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 7

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a commercial parking lot. The property is owned by K J L Realty Company. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 14

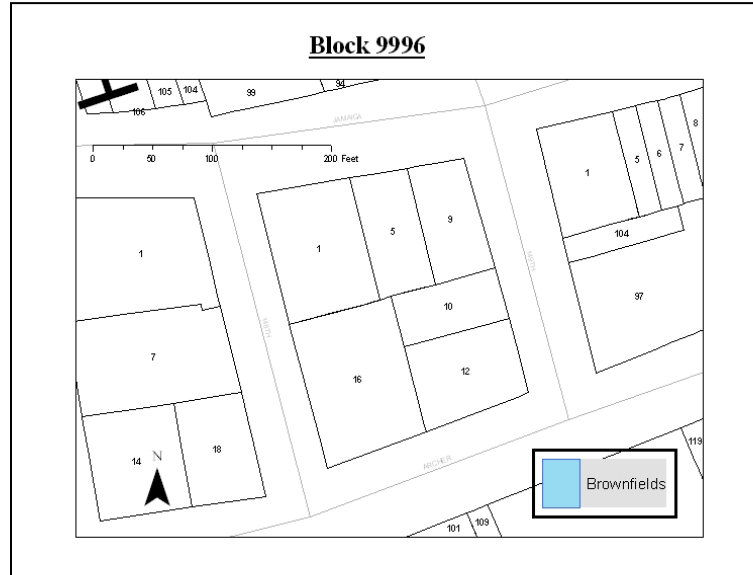
Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a used auto dealership and auto repair shop. The property is owned by K J L Realty Company. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 18

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a commercial parking lot. The property is owned by K J L Realty Company. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 9996

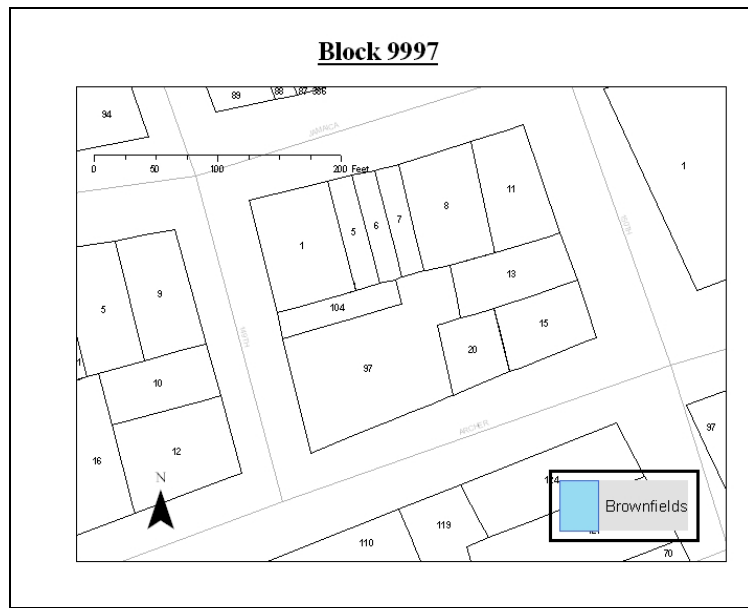
Lot	Present Use
1	Retail
5	Retail
9	Retail
10	Vacant Storefronts
12	Mixed
12	Mixed
16	Retail
16	Storage/Moving



There are no brownfields on Block 9996.

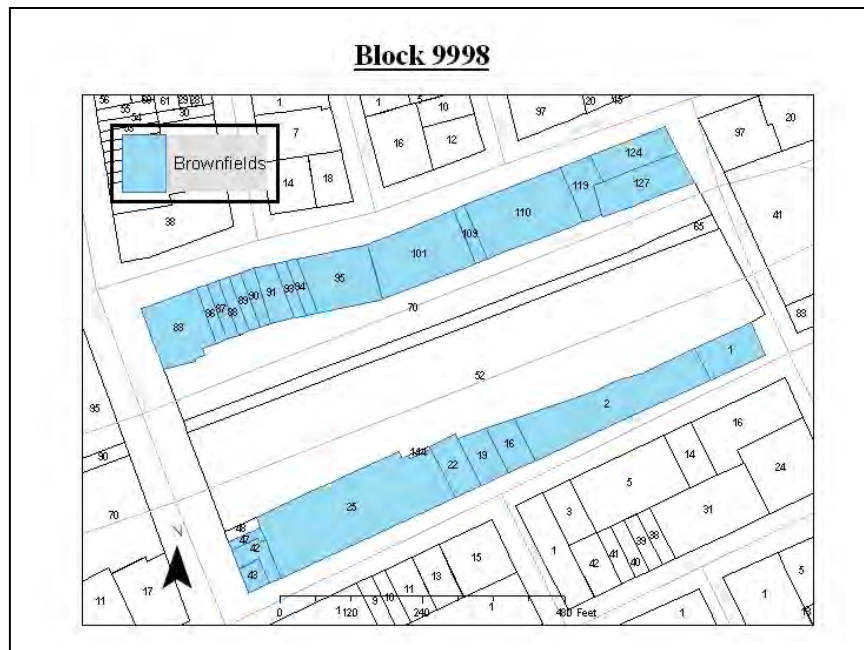


## Block 9997



There are no brownfields on Block 9997.

## Block 9998



### Lot Present Use

1	Outdoor Storage
2	Warehouse
16	Outdoor Storage
19	Outdoor Storage
22	Outdoor Storage
25	Warehouse
42	Warehouse
43	Office Space
47	Warehouse
48	Office Space- Vacant
52	LIRR
65	LIRR
70	LIRR
83	Retail
86	Vacant storefront
87	Retail
88	Retail
89	Office Space
90	Office Space
91	Retail
93	Residential
94	Car Service
95	Auto Repair
101	Vacant office spaces
109	Auto Repair
110	Parking Garage
119	Auto Repair
124	Retail
127	Warehouse

### Lot 1

Reason for identification as a brownfield: **“e” designation by the City of New York.** This property has parked vehicles and equipment behind a masonry wall. It is partly owned by an industrial equipment supplier. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 2

Reason for identification as a brownfield: **“e” designation by the City of New York.** This property is presently occupied by a hardware store. The only past code violation observed was for installation of a drop ceiling without a permit. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 16, 19 and 22

Reason for identification as a brownfield: **“e” designation by the City of New York.** Based on observations from the street, it appears these three lots, who have common ownership, are being used to park equipment or possibly cargo containers behind a masonry wall. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 25

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This property is owned by Land and Sea Development Corp. The building is used as a food distribution warehouse. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 42

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a warehouse that is owned by a subsidiary of Greater Jamaica Development Corporation. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 43

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This was a retail property that is currently being used as the Marketing Center for Greater Jamaica Development Corporation. A subsidiary of the Corporation owns the property. It appears that at least one of the former retail uses was a butcher shop. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 47

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This property is owned by a subsidiary of Greater Jamaica Development Corporation and was formerly occupied by a wholesale meat packing business, possibly a butcher shop. It is currently a small empty lot shielded from the street by a chain-link fence. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 83

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a three-story building with office space on the upper two floors and retail on the ground floor. The property is owned by a subsidiary of Greater Jamaica Development Corporation. Past building code violations, which pre-date the acquisition by the present owner, include failure to maintain the façade and work without a permit. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 86

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a mixed use building with office space on the second floor and retail on the ground floor. The building is owned by a transportation labor union and has been since the late 1960s. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 87

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story mixed use building. No past uses other than retail and office have been documented. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 88

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story mixed use building with office on the top floor and retail on the ground floor. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 89

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story mixed use building occupied by office space. It is owned by a subsidiary of Greater Jamaica Development Corporation. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 90

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This is a two-story building with office space upstairs and retail on the ground floor. It is owned by Emilia Realty Corp. The property was owned in the early 1970s by Sturdy Concrete Company Corporation, which is a

Lot 91

Reason for identification as a brownfield: **“e” designation by the City of New York.** This one-story building is occupied by an office supply and copy shop business. At one point in the past it was occupied

by an auto repair business. As with lots 93 and 94, it is owned by Emilia Realty Corp. No records of spills or enforcement actions by environmental regulatory agencies were found.

#### Lots 93 and 94

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot 93 has a two-story mixed use building constructed on it. The retail storefront on the ground floor is vacant. Lot 94 is an adjacent parking lot that is shielded from the street by a chain-link fence. The two lots are owned by Emilia Realty Corp. No records of spills or enforcement actions by environmental regulatory agencies were found.

#### Lot 95

Reason for identification as a brownfield: **“e” designation by the City of New York.** This property is shared by a garage door company and an auto repair business. It is owned by a subsidiary of Greater Jamaica Development Corporation. No records of spills or enforcement actions by environmental regulatory agencies were found.

#### Lot 101

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a one-story office building with several feet of asphalt frontage that is regularly used for parking. The lot is owned by a subsidiary of Greater Jamaica Development Corporation. No records of spills or enforcement actions by environmental regulatory agencies were found.

#### Lot 109

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a garage used by an auto-repair business. The lot was empty at one point during the 1960s or early 1970s, according to an old photograph. No records of spills or enforcement actions by environmental regulatory agencies were found.

#### Lot 110

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a one-story parking garage and no other previous use has been identified. No records of spills or enforcement actions by environmental regulatory agencies were found.

#### Lot 119

Reason for identification as a brownfield: **“e” designation by the City of New York.** The use on this property is auto repair and likely has been since at least the early 1980s. No records of spills or enforcement actions by environmental regulatory agencies were found.

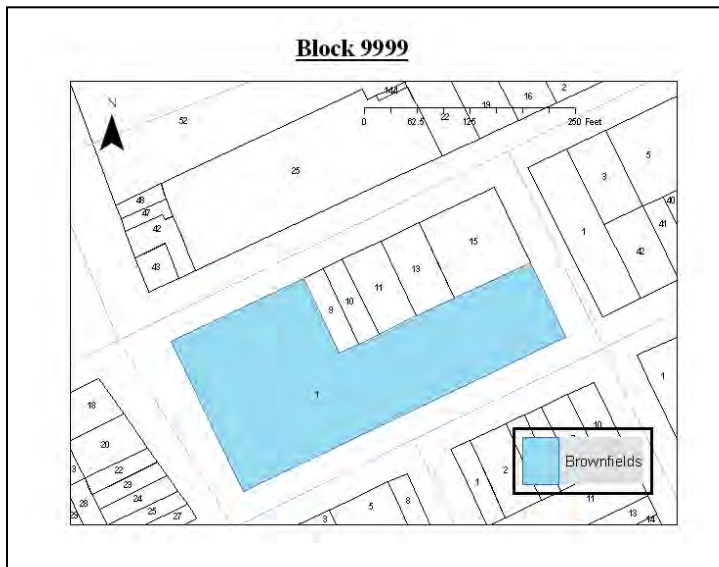
#### Lot 124

Reason for identification as a brownfield: **“e” designation by the City of New York.** This property is occupied by an auto repair business and no other previous use on the property has been identified. No records of spills or enforcement actions by environmental regulatory agencies were found.

#### Lot 127

Reason for identification as a brownfield: **“e” designation by the City of New York.** This property is owned by Bellino Equities and is a garage that may or may not have a tenant. In the mid-1970s, the property was owned by a construction and excavation company. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 9999

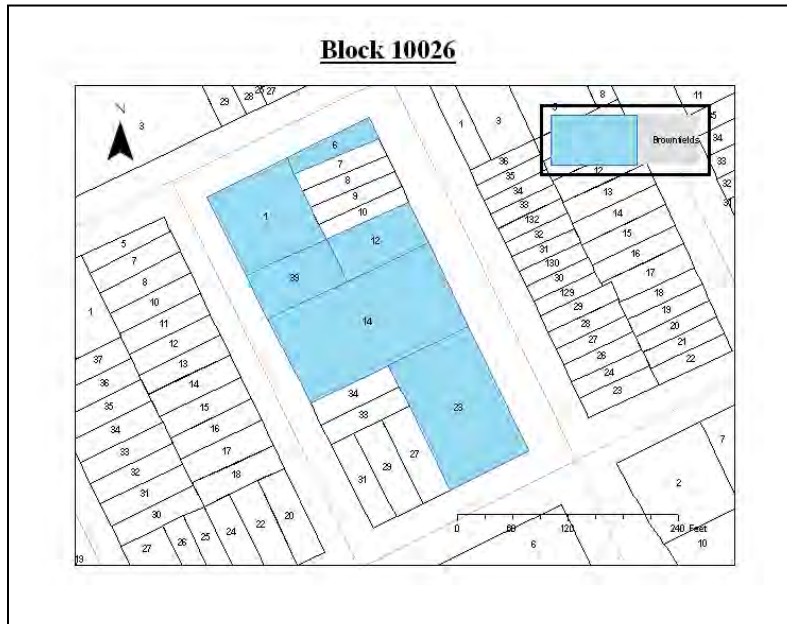


Lot	Present Use
1	Vacant Land
9	Warehouse
10	Warehouse
11	Warehouse
13	Warehouse
15	Warehouse

### Lot 1

Reason for identification as a brownfield: **results of Phase 1 Environmental Site Assessment (ESA).** The entire block is slated for a redevelopment project and the abandoned former meat packing plant on Lot 1 has been demolished. A Phase 1 ESA for the property indicated the presence of some abandoned underground storage tanks and abandoned drums in the building containing unknown substances. However, no contaminants rising to the level of BCP credits were discovered during site preparation. The site was fully cleared in 2008 and is now shovel ready.

## Block 10026



Lot	Present Use
1	Parking Lot
6	Commercial
7	Residential
8	Residential
9	Retail
10	Retail
12	Auto Repair
14	Warehouse
23	Parking Lot
27	Single Family
29	Single Family
31	Single Family
33	Single Family
34	Single Family
39	Parking Lot

### Lot 1

Reason for identification as a brownfield: **“e” designation by the City of New York.**

The lot is paved and used for parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 6

Reason for identification as a brownfield: **“e” designation by the City of New York.**

The lot has a two-story commercial building on it. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 12

Reason for identification as a brownfield: **“e” designation by the City of New York.**

The lot has a one-story commercial building on it. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 14

Reason for identification as a brownfield: **“e” designation by the City of New York.**

Most of the lot is covered by a vacant one-story commercial building. The building was previously used as a warehouse. No records of spills or enforcement actions by environmental regulatory agencies were found.

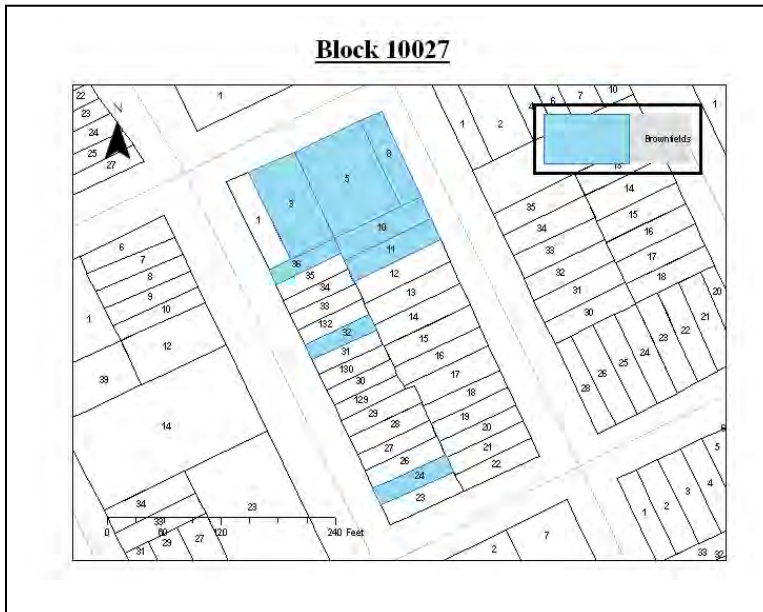
### Lot 23

Reason for identification as a brownfield: **“e” designation by the City of New York.**

The lot is paved and is used for parking. Records indicate that a portion of the lot was used historically as an auto body repair shop. No records of spills or enforcement actions by environmental regulatory agencies were found.



## Block 10027



### Lot 3

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is paved and used for parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 5

Reason for identification as a brownfield: **“e” designation by the City of New York.** This lot is occupied by a one-story industrial warehouse building. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 8

Reason for identification as a brownfield: **“e” designation by the City of New York.** This lot is occupied by a two-and-a-half-story residential house. The house is owned by a nearby concrete manufacturing business. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 10

Reason for identification as a brownfield: **“e” designation by the City of New York.** This lot is occupied by a one-story industrial building. The building is used by a nearby concrete manufacturing facility. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 11

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is paved and used for parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 24

Reason for identification as a brownfield: **site of DEC-registered spill.** This lot is occupied by a two-story mixed use building, with ground floor retail and residential above.

Lot	Present Use
1	Commercial
3	Parking
5	Warehouse
8	Single Family
10	Factory
11	Factory
12	Factory
13	2 Family Detached
14	2 Family Detached
15	2 Family Detached
16	2 Family Detached
17	2 Family Detached
18	2 Family Detached
19	Single Family
20	2 Family Detached
21	Multi Family
22	2 Family Detached
23	Residential
24	Residential
26	Residential
27	Residential
28	Residential
29	Residential
30	Residential
31	Residential
32	Residential
33	Residential
34	Residential
35	Residential
36	Retail
129	Residential
130	Residential
132	Residential

#### Lot 32

Reason for identification as a brownfield: **site of DEC-registered spill.** This lot is occupied by a two-story mixed use building, with ground floor retail and residential above.

#### Lot 36

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This lot is occupied by a two-story mixed use building, with ground floor retail and residential above. The building is owned by a nearby concrete manufacturing business. No records of spills or enforcement actions by environmental regulatory agencies were found.

### **3.3(B) Existing Land Use and Zoning – Station Area BOA**

Commercial uses dominate the Station Area BOA, with four of the twelve blocks in the BOA made up entirely of such uses. A total of 105 properties are commercial, which constitutes 69.5% of the 151 properties in this BOA. With the exception of the block that fronts on 147<sup>th</sup> Place, which is a residential street, there are only six residential properties in the Station Area BOA. The remainder of the properties are either industrial, public or transportation uses.

With the exception of the southeastern corner of block 9998, the entire Station Area BOA is now zoned medium density commercial. Prior to the 2008 rezoning, many properties adjacent to the JFK AirTrain in the Station Area were zoned low density M1.

The Downtown Jamaica overlay district also covers the entire BOA. Likely the greatest significance of the overlay district in the Station Area BOA is that it requires adherence to more specific design standards on buildings fronting on portions of Sutphin Boulevard, Archer Avenue, Jamaica Avenue and some corresponding corners with 94<sup>th</sup> and 95<sup>th</sup> Avenues. Examples include a requirement for a minimum amount of transparent surface on the streetwall and a limitation on the frontage that a building lobby can occupy.

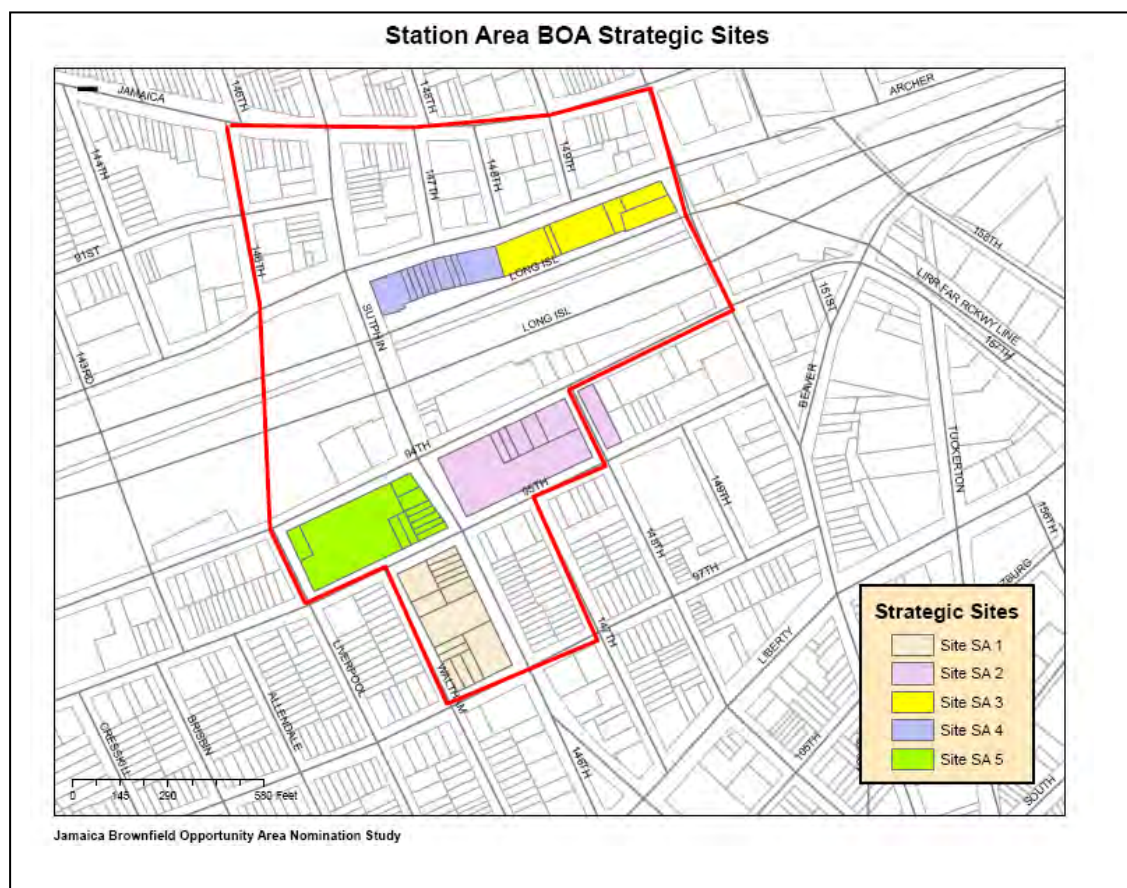
#### **Land Ownership Pattern**

All of the publicly owned properties in the Station Area BOA are devoted either to the MTA or the AirTrain. GJDC, however, has substantial land holdings in the area which will facilitate future redevelopment in this BOA as private investors are identified for the projects. One private developer in particular has assembled an entire block for the purposes of building a hotel. The block bounded by Sutphin Boulevard, 147<sup>th</sup> Place, 97<sup>th</sup> Avenue and 95<sup>th</sup> Avenue has the largest number of different property owners likely because it is predominantly a residential block.

### 3.4(B) Abandoned, Vacant and Underutilized Properties - Station Area BOA

Because the Station Area has undergone significant changes over the past decade and has attracted much attention from the private and public sectors, there are no abandoned properties. There are, however, several underutilized properties that see either sporadic use or have an entire portion, such as upper floors, that goes unused. This is not uncommon in this part of Jamaica given that the vacancy rate for commercial office space remains relatively high as compared to the more established employment centers in Manhattan. Figure 11, page 64 illustrates the underutilized properties in the Station Area BOA.

### 3.5(B) Strategic Sites – Station Area BOA



and more modern hotels are critical to ensuring that the transportation hub provides a full range of services to travelers, as well as serving a need that had been emphasized repeatedly by residents in public and stakeholder meetings both for the BOA and for other planning initiatives in the community.

Station Area Site 2: Block 9999 – Entire Block, Block 10000 Lot 1

SA 2 is the site of the former Merkel meat-packing plant. It is also Site LG 3, as the site straddles the boundary of both the Liberty Gateway BOA and the Station Area BOA. The building has been demolished, however, the project that had been initially planned for the property has been replaced with a new plan from a developer for a mix of uses, which could include low-income housing, retail and possibly parking. A highest and best use study conducted outside the scope of this Nomination Study recommended mixed use retail/office complex for the site. GJDC continues to advocate for that position.

This property is located on the opposite corner of the AirTrain terminal. Its location is exceptionally convenient for anyone exiting either AirTrain or the LIRR. It also lies along the future One-Way Pair and, therefore, will have ample access for deliveries. The current plan for low-income housing on the site is inappropriate given the location of the property. The future use of the property should focus on the retail and commercial components necessary to move revitalization of the Station Area forward.

Station Area Site 3: Block 9998 Lots 101, 109, 110, 119, 124, 127

Site SA 3 consists of six properties along the southern portion of Archer Avenue between 150<sup>th</sup> Street and Sutphin Boulevard. The uses on the site include a one-story office building, two auto body repair shops and a one-story parking garage. The LIRR tracks are elevated and run along the southern boundary of the site. Infrastructure needs particular to this site can be found in Appendix D, Summary of Consultant Products, Executive Summary 1: Area/Infrastructure Analysis.

A redevelopment scenario has been developed for SA 3 and is included in Section 2. The recommended reuse is for a parking garage with neighborhood retail wrapped around the structure on the ground floor. This site is strategic due to the fact that it is largely assembled, has no residential properties and is under-utilized given the change in zoning from M1-1 to C6-3. Providing adequate parking for employees that drive into the area every day and shoppers that flock to the shops on Jamaica Avenue is an on-going struggle and construction of a garage on this property will continue the drive to meet this ever-growing need.

Station Area Site 4: Block 9998 Lots 83, 86, 87, 88, 89, 90, 91, 93, 94, 95

This site is located at the southeast corner of Archer Avenue and Sutphin Boulevard across the street from the LIRR Station. The site is strategic due to its location at one of the most central intersections in Downtown Jamaica. A substantial portion of the site is underutilized and all of the properties comprising the site are brownfields. There is presently a drug store on the corner and the other uses on the site are largely small storefront businesses with vacant space on the upper floors. The site has been assembled by GJDC and New Markets Tax Credits will be utilized to leverage additional investment in the planned project.

The plan for the site is still a 500,000 square-foot project with a hotel (200-300 rooms), conference space (10,000 - 15,000 sf), two floors of retail (70,000 sf), and market and affordable hous-

ing (200-300 units, depending on size of the hotel). The need for the above uses in the Station Area, particularly conference space, has been identified through the BOA Nomination Study's public outreach and visioning process. This is a long-term plan that GJDC has put in place over several years and

#### Station Area Site 5: Block 9993

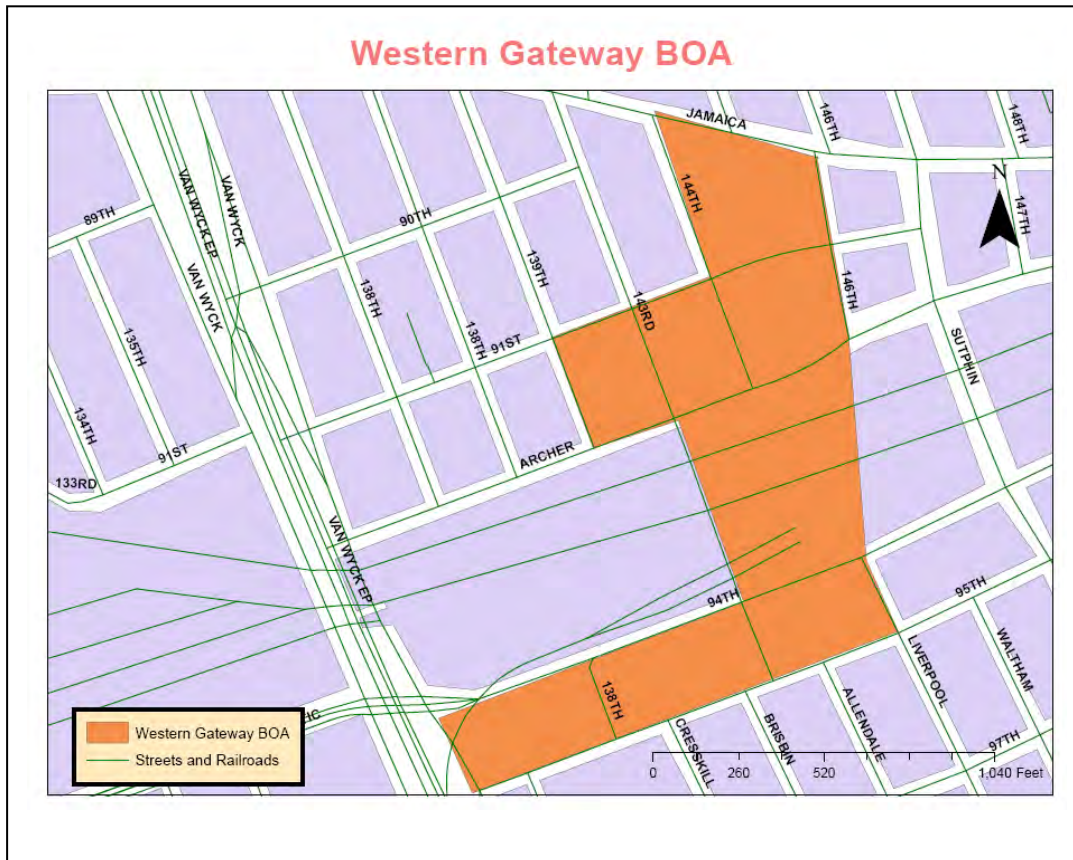
Block 9993 has a large number of small businesses, including a cash register store, a restaurant, a gentleman's club and a grocery store. Most of these operate as storefronts with residential units on the upper floors. The largest lot on the block, lot 3, has an office building occupied by the New York City Department of Finance.

The entire block carries an "e" designation and that potential for contamination, combined with the lot's location directly at the intersection of 94<sup>th</sup> Avenue and Supthin Boulevard, make this a strategic site. This site is largely underutilized due to the increased maximum FAR that was instituted as part of the new zoning in 2008. The lack of greenspace and recreational space, in general, in Downtown Jamaica and the potential for utilization of such space by residents living in nearby housing and by those traveling through the transportation hub make this site an ideal location for a park.



### 3.2(C) Inventory and Analysis - Western Gateway BOA

Western Gateway serves as the entrance to Downtown Jamaica for motorists coming from the Van Wyck Expressway and for those exiting Kennedy Airport on the AirTrain. As a result, transportation infrastructure covers much of the Western Gateway BOA. Despite the high visibility of the blocks to the north and south of the LIRR and AirTrain tracks, only the Atlantic Avenue Extension project has taken steps to improve the visual quality of the area. The redevelopment contemplated in the Western Gateway BOA as part of this nomination study will further this objective and will assist in the overall economic revitalization of the community.

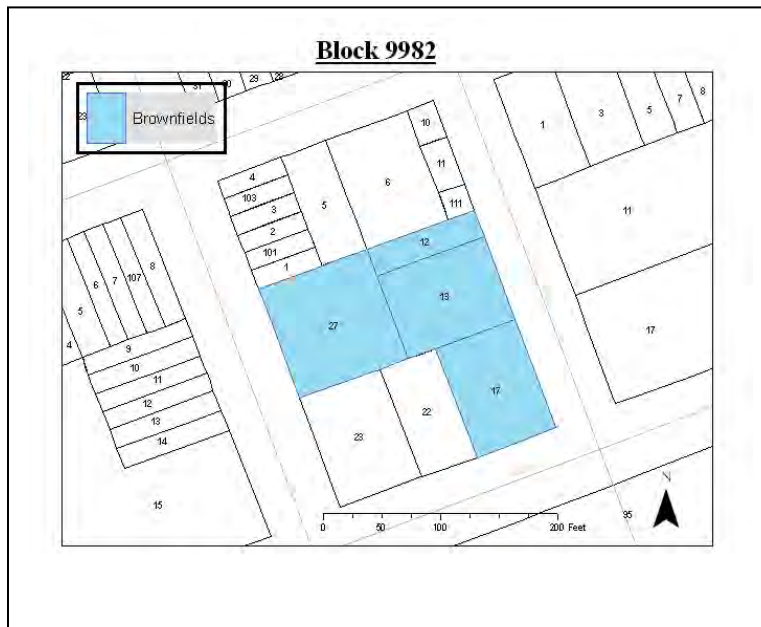


#### Brownfields in the Western Gateway BOA

The Western Gateway BOA is made up of tax blocks 9982, 9984, 9985, 9986, 9990, 9991, 9992 and a portion of tax block 9989. The blocks in the Western Gateway BOA with the greatest redevelopment potential are also largely covered with brownfields. The northern portion of the BOA has fewer brownfields and less redevelopment potential. What follows is a block-by-block description of these brownfields.



## Block 9982



Lot	Present Use
1	Multi Family
2	Multi Family
3	Multi Family
4	Multi Family
5	2 Family De-tached
6	Office
10	Multi Family
11	Multi Family
12	Retail
13	Warehouse
17	Warehouse
22	Vacant
23	Warehouse
27	Warehouse
101	Multi Family
103	Multi Family
111	Office

### Lot 12

Reason for identification as a brownfield: **“e” designation by the City of New York** This property is the present headquarters of the Industrial Bearing and Supply Company and is owned by the Port Merrick Development Corporation in Locust Valley, New York. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 13

Reason for identification as a brownfield: **“e” designation by the City of New York** This property is a warehouse owned by the Port Merrick Development Corporation in Locust Valley, New York. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 17

Reason for identification as a brownfield: **“e” designation by the City of New York** This property is a warehouse that stores laundry equipment. It is owned by the Port Merrick Development Corporation in Locust Valley, New York. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 27

Reason for identification as a brownfield: **“e” designation by the City of New York** This property is a warehouse containing a business called MSAB Enterprises. The property is owned by Moussaieff Yoram. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 9984

Lot	Present Use
1	Single Family Home
3	Multi Family
5	Multi Family
7	Multi Family
8	Multi Family
10	Multi Family
11	Concert Hall
17	Vacant

### Lot 11

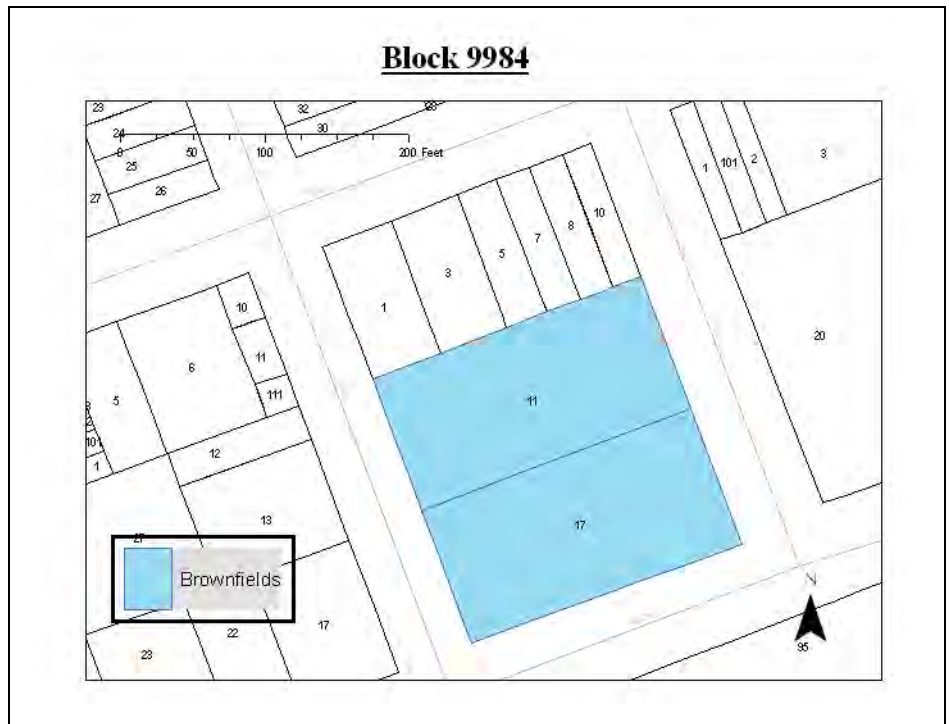
Reason for identification as a brownfield: **“e” designation by the City of New York**

This building is presently an assembly hall and was converted from a warehouse in 1992. It is owned by 144<sup>th</sup> Place Owners Company. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 17

Reason for identification as a brownfield: **“e” designation by the City of New York**

This is a warehouse owned by KJL Realty Company. No records of spills or enforcement actions by environmental regulatory agencies were found.



## Block 9985

There are no brownfields on Block 9985

Lot      Present Use

1    City Transit Grid

4    Retail

5    Retail

6    Retail

7    Church

9    Retail

10   Retail

11   Retail

13   Retail

20   Warehouse

20   Retail

26   Single Family

27   Single Family

28   Single Family

29   Single Family

30   Single Family

32   Single Family

34   Single Family

36   Single Family

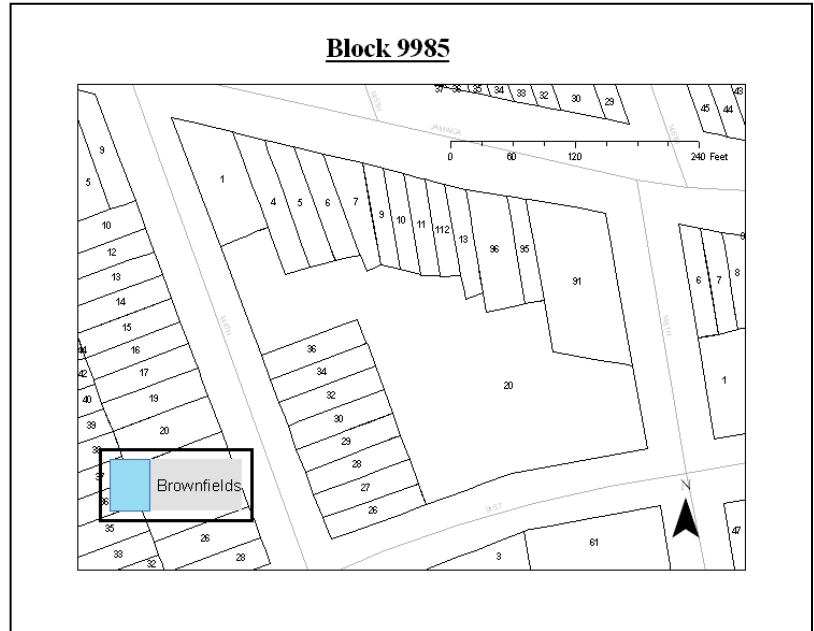
91   Retail

95   Retail

96   Retail

96   Retail

112   Retail



## Block 9986

Lot	Present Uses
1	2-Family Detached
2	2-Family Detached
3	Factory and Offices
20	Factory and Offices
61	School
70	Retail
73	Auto Repair
75	Office Space
101	2-Family Detached



### Lot 2

Reason for identification as a brownfield: **site of DEC-registered spill**

This is a two-story residence that was cited for a code violation in 2000 because it was converted from a one-family residence to a two-family. The property is owned by Dharindra Seoparsan.

### Lot 3

Reason for identification as a brownfield: **“e” designation by the City of New York**

This is an apparel factory housing Modern Age Enterprises, which also owns the building. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 20

Reason for identification as a brownfield: **“e” designation by the City of New York**. The building is a factory with an adjacent parking area. The last documented business in the building was a rubber products manufacturer but the present occupant is unknown. The New York City Transit Authority owns an easement on a portion of the property. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 61

Reason for identification as a brownfield: **“e” designation by the City of New York and site of DEC-registered spill**. This building houses a school for developmentally challenged children. There is a 20-year lease, starting in 2006, from the owner “91-10 146”.

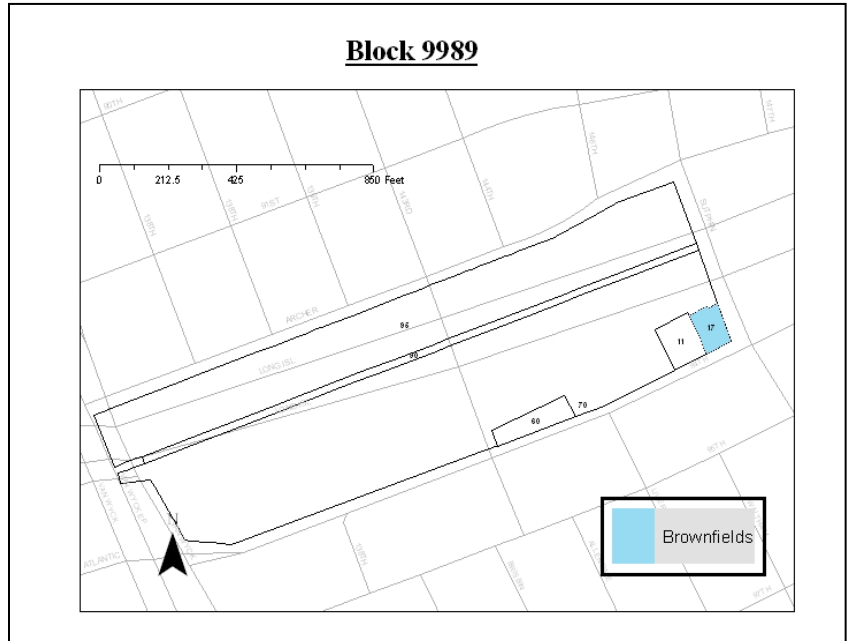
### Lot 75

Reason for identification as a brownfield: **site of DEC-registered spill**

The building on this property has been deemed eligible for listing on the National Register of Historic Places due to its historic transportation use. It is presently an office building used by the Long Island Railroad.

## Block 9989

Lot	Present Use
11	Transportation
17	Transportation
60	Parking
70	Vacant
90	Transportation
95	Transportation



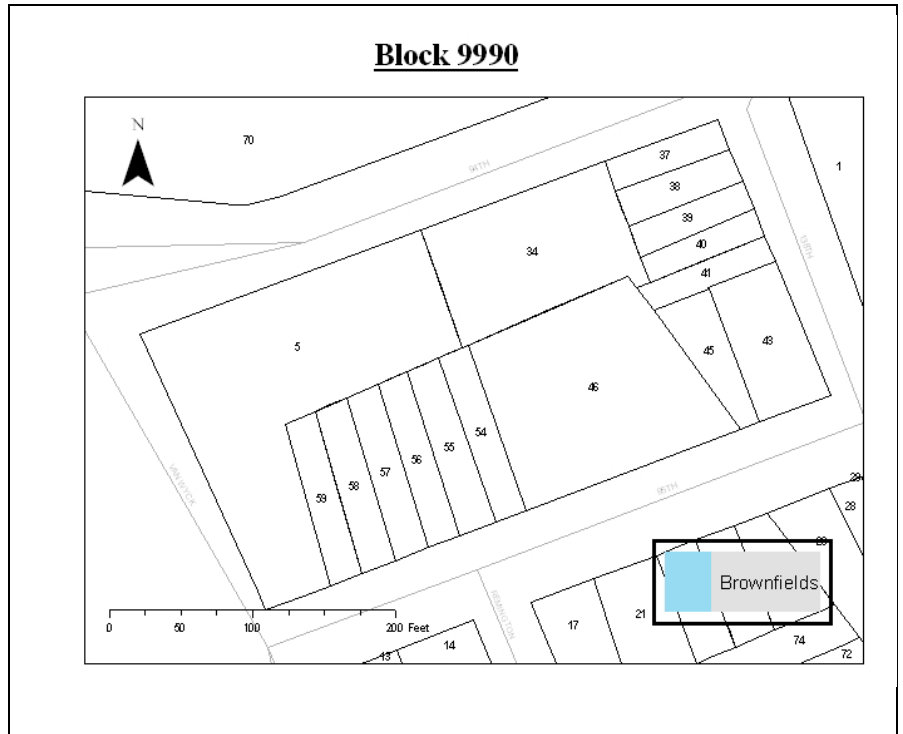
### Lot 17

Reason for identification as a brownfield: **site of DEC-registered spill**

The AirTrain Station, owned and operated by the Port Authority of New York and New Jersey, sits on this and several other parcels on this block.

## Block 9990

Lot	Present Use
5	Vacant Lot
34	Vacant Bldg
37	Single Family
38	Single Family
39	Single Family
40	2 family detached
41	Multi Family
43	Multi Family
45	2 family detached
46	Trucking Terminal
54	Single Family
55	Single Family
56	Single Family
57	Single Family
58	Single Family
59	2 family detached



There are no brownfields on Block 9990.



## Block 9991

Lot	Present Use
1	Self Storage
19	Hotel
61	Office
62	2 family detached
63	3 family detached
64	4 family detached
68	Vacant



### Lot 1

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a three-story building that houses a self-storage business and self storage units. The business began operation approximately in 2002. The property was previously an industrial bakery. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 19

Reason for identification as a brownfield: **“e” designation by the City of New York and site of DEC-registered spill.** This is a one-story auto repair and service station, with cars parked regularly atop the asphalt parking lot that extends to the lot line on 94<sup>th</sup> Avenue.

### Lot 68

Reason for identification as a brownfield: **“e” designation by the City of New York and site of DEC-registered spill.** This is the site of a hotel that began operations approximately in 2005. A service station was located on the property prior to construction of the hotel.

## Block 9992



Lot Present Use  
26 Retail/Warehouse

27 Auto Repair  
29 Auto Repair/Club

32 Auto Repair  
33 Retail  
34 Single Family  
36 2 family detached

38 Auto Repair  
41 Mixed Use  
41 Multi Family  
43 Multi Family

45 Multi Family

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46 Multi Family  
47 2 Family Detached  
48 2 Family Detached  
49 Daycare  
50 Multi Family  
51 Multi Family  
52 Multi Family  
53 2 Family Detached  
54 2 Family Detached  
55 2 Family Detached  
56 2 Family Detached  
57 2 Family Detached  
58 Mixed Use

### Lot 26

Reason for identification as a brownfield: **“e” designation by the City of New York.** This building houses J-C Bedding, Inc., which sells and distributes mattresses. An air cargo/freight shipping company formerly operated at the location. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 27

Reason for identification as a brownfield: **“e” designation by the City of New York.** An auto body repair shop operates on the property. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 29

Reason for identification as a brownfield: **“e” designation by the City of New York.** Club Kalua, a nightclub, currently operates on the property. A business called “Great Wall MFG” was previously located there. Immediately prior to its operation as a nightclub, a used auto dealership and auto repair shop (“Van

Wyck Auto Diagnostic”) operated here. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 38

Reason for identification as a brownfield: **“e” designation by the City of New York.** Hart Auto Works and Auto Repair operates on the property. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 43

Reason for identification as a brownfield: **site of DEC-registered spill.** This property is residential and no evidence of a previous use other than residential was found. The spill that was reported was of approximately 1 gallon of #2 fuel oil.

### **3.3(C) Existing Land Use and Zoning – Western Gateway BOA**

Commercial uses consume the largest portion of the Western Gateway BOA from the perspective of acreage. There is, however, a large number of residential lots in this area. Exactly fifty percent, or 58, of the 106 properties in this BOA are residential. Only two are transportation uses but one is the LIRR tracks that run along Archer Avenue.

Zoning is varied across the Western Gateway BOA with residential covering the northern-most block, commercial covering two of the four blocks between 94<sup>th</sup> and 95<sup>th</sup> Avenues and even some manufacturing on the western-most block abutting Van Wyck Boulevard. The substantial diversity of zoning here is a reflection of the transitional nature of this area between the elevated Air-Train and LIRR tracks, the Van Wyck Expressway and Downtown Jamaica. There are also special design requirements for ground floor development and governing curb cuts in portions of the Western Gateway BOA, particularly along 94<sup>th</sup> and 95<sup>th</sup> Avenues, due to the location of the Downtown Jamaica overlay district here.

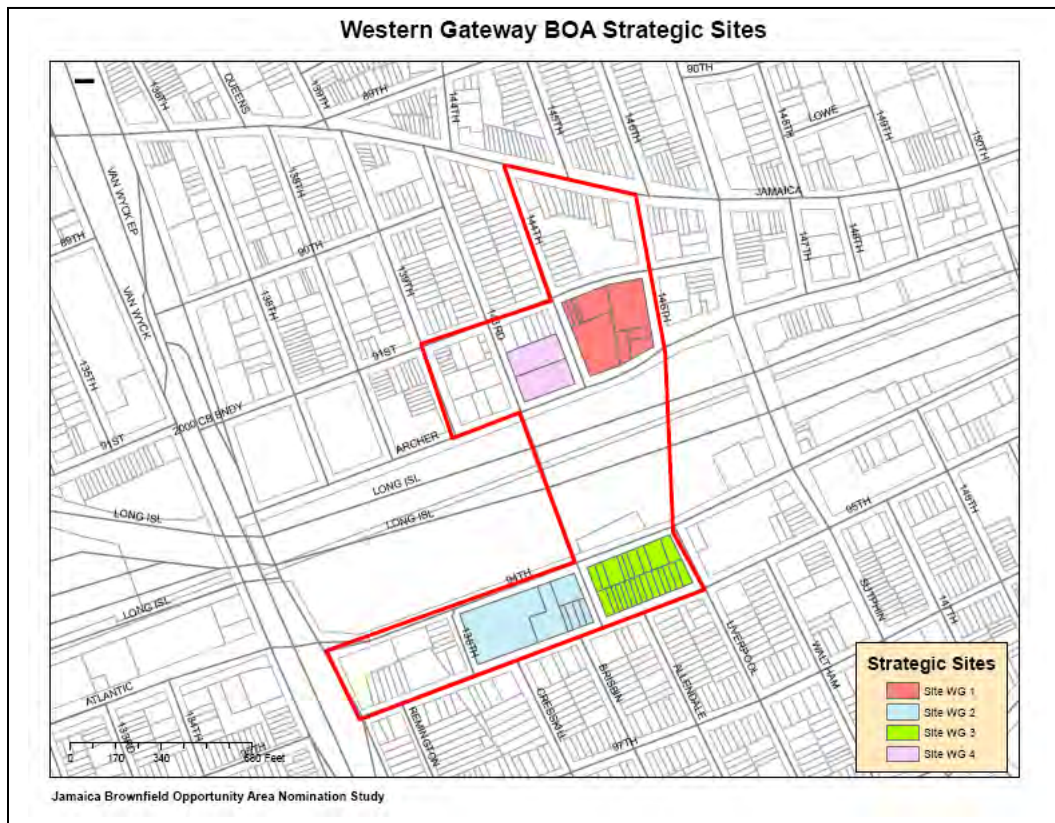
#### **Land Ownership Pattern**

There are four publicly owned properties in the Western Gateway BOA, all of which have transit-related uses. For the purposes of site assembly, there is common ownership on block 9986. Block 9990 is being acquired for the Atlantic Avenue Extension project and will, therefore, have common ownership. The number of privately owned residential properties in the Western Gateway BOA is proportionately high compared to the other three BOAs and there are, therefore, a large number of private owners.

### **3.4(C) Abandoned, Vacant and Underutilized Properties - Western Gateway BOA**

None of the six underutilized properties within the Western Gateway BOA are abandoned. They all, however, have uses inconsistent with both the redevelopment plan for Downtown Jamaica and the vision of this Nomination Study. Of particular concern are lots that are used for parking but are not properly designed or zoned for those purposes. Figure 11 on page 64 indicates the locations of these underutilized properties.

### 3.5(C) Strategic Sites - Western Gateway BOA



Western Gateway Site 1: Block 9986

Block 9986 has three residential properties, a warehouse, a school, a two-story retail/office building, several parking lots and a historic structure currently used as offices by the Long Island Railroad. A redevelopment scenario for a strategic site in this BOA has been developed and is included in Section 2.

The proposed use for the site is a combination of ground-floor neighborhood retail and loft-style live/work space on upper floors. This redevelopment would further the objective of bringing more retail uses in close proximity to Station Plaza and would provide an opportunity for adapted reuse of a historic structure. WG 1 was identified as a strategic site because of its location near the key intersection of Sutphin Boulevard and Archer Avenue and due to the neglect seen on several properties on the block. Infrastructure needs particular to this site can be found in Appendix D, Summary of Consultant Products, Executive Summary 1: Area/Infrastructure Analysis.

Western Gateway Site 2: Block 9991

Site WG 2 consists of the entirety of Block 9991. This block has a self-storage garage that takes up the majority of the block on its west side. It also has a hotel, a garage that may presently be vacant and four residential properties. This site was identified as strategic because of its key location adjacent to the Atlantic Avenue Extension and One-Way Pair and its comparatively large lots.

Any commercial redevelopment on this site should take advantage of the public investments in the surrounding area, particularly the AirTrain and/or the One-Way Pair. Redevelopment of this site would also improve the streetscape and the pedestrian experience if proper design guidelines were followed.

Western Gateway Site 3:           Block 9992

This block has approximately eighteen residences, a notorious nightclub, a mattress warehouse, an auto parts store, two auto repair businesses, a live poultry market and a bodega with residential units upstairs. The block is adjacent to the AirTrain Terminal with the residences clustered along the southern portion of the block fronting on 95<sup>th</sup> Avenue. This was chosen as a strategic site because of its critical location in relation to the Terminal, as well as the One-Way Pair, and the potential for contamination on the properties of the auto-oriented businesses.

Redevelopment of this block should be sensitive to the needs of the residents while at the same time ensuring that businesses that locate here provide services consistent with either the needs of the surrounding neighborhood or the needs of travelers that use the transit hub. Almost any new construction on the northern portion of the block would improve Jamaica's image in the eyes of travelers. Given the fact that the AirTrain looks directly down on this block from its platform, a change in appearance here, not to mention elimination of noxious odors emanating from the live poultry market, is critical to the future of the revitalization effort.

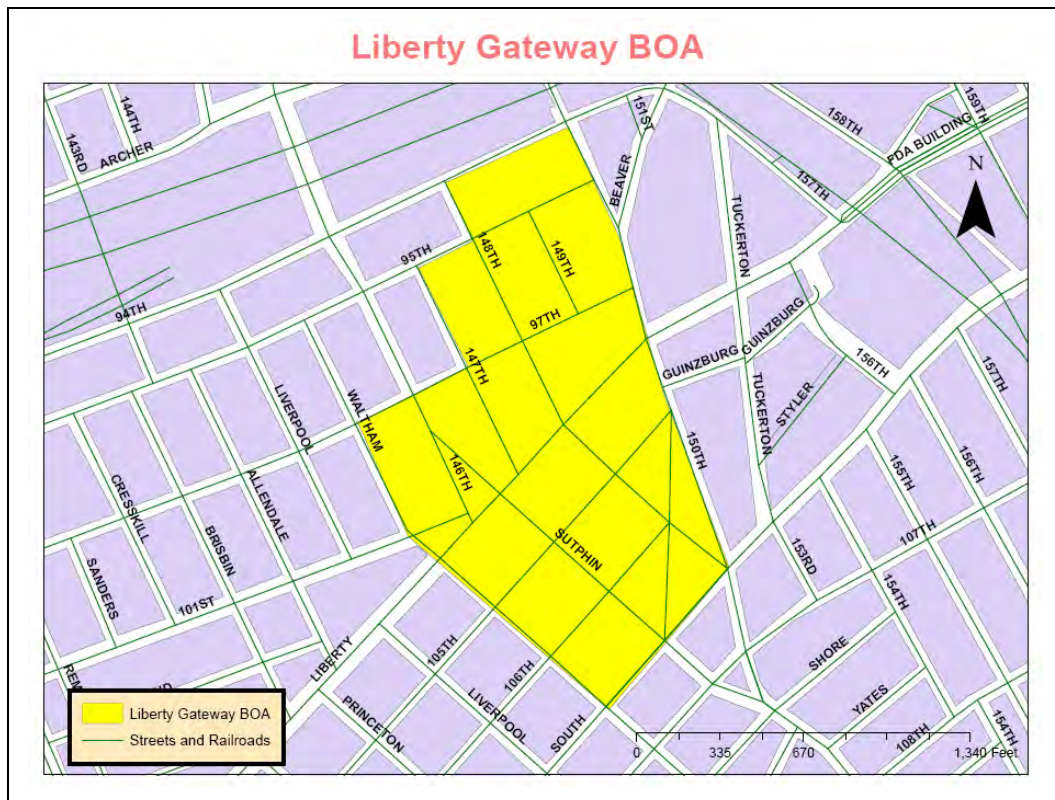
Western Gateway Site 4:           Block 9984 Lots 11, 17

Lots 11 and 17 are the largest and only non-residential lots on block 9984. On lot 11 is an assembly hall/social club that was formerly a warehouse. Lot 17 is a warehouse occupied by an electrical systems contractor. Both properties carry an e-designation and it is this potential for contamination as well as the size of the lots and the site's location across the street from the LIRR tracks that make it strategic.



### 3.2(D) Inventory and Analysis - Liberty Gateway BOA

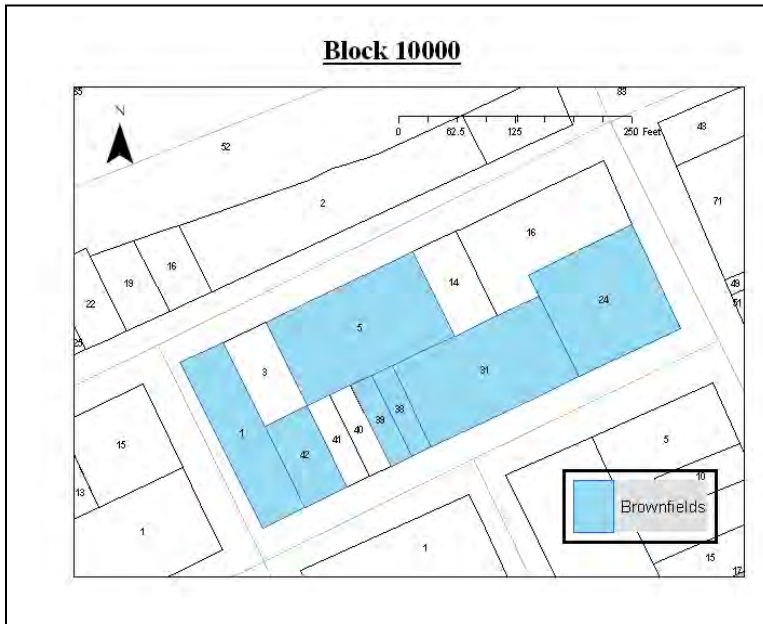
The majority of the Liberty Gateway BOA is a stable neighborhood surrounded by commercial uses serving the needs of local residents. This area is also, however, a significant employment base for Downtown Jamaica. It further serves as an entry point for vehicles exiting the Van Wyck Expressway and proceeding north and east along Liberty Avenue.



#### Brownfields in the Liberty Gateway BOA

There are sixteen tax blocks in the Liberty Gateway BOA: 10000, 10001, 10002, 10028, 10030, 10031, 10032, 10033, 10055, 10056, 10057, 10058, 10059, 10060, and 10061. The Liberty Gateway BOA has a relatively high number of residential properties. At the same time, however, it contains some of the most productive industrial property in Downtown Jamaica and the conflict between these residential and industrial uses makes redevelopment of this area particularly important. What follows is a block-by-block description of brownfields within the Liberty Gateway BOA.

## Block 10000



Lot	Present Use
1	Vacant Lot
3	Vacant Warehouse
5	Vacant Warehouse
14	Warehouse
16	Warehouse
24	Warehouse
31	Cement Plant
38	Cement Plant
39	Cement Plant

### Lot 1

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is an abandoned overgrown lot that is part of the redevelopment planned for Block 9999, which is located across 148<sup>th</sup> Street to the west. No records of spills or enforcement actions by environmental regulatory agencies were found.

40	Cement Plant
41	Vacant Lot

42	2 Family Detached
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### Lot 5

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a warehouse, likely housing some operations related to the adjacent cement plant, as both properties have the same owner. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 24

Reason for identification as a brownfield: **result of previous GJDC property survey.** Queens Industrial Electric operates in this former warehouse. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 31

Reason for identification as a brownfield: **“e” designation by the City of New York.** A cement plant operates on this property. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 38

Reason for identification as a brownfield: **“e” designation by the City of New York.** This appears to be a former residential property that was acquired several years ago by the owner of the

cement plant and is now used for a portion of that business. No records of spills or enforcement actions by environmental regulatory agencies were found.

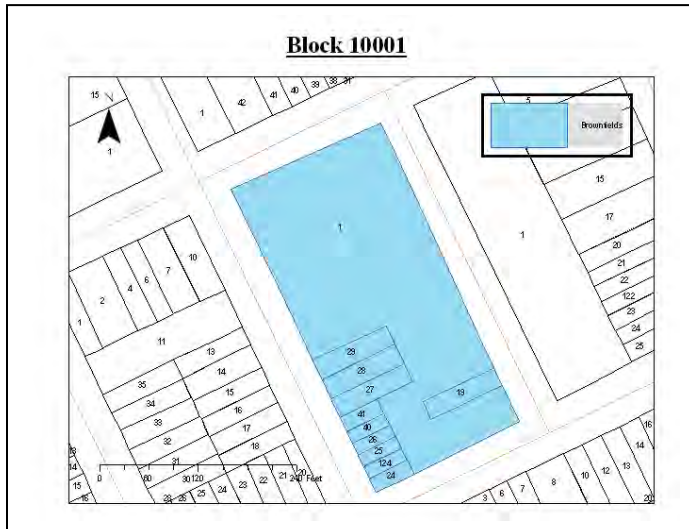
Lot 39

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a former residential property that was purchased by the owners of the adjacent cement plant in 1980. It is now being used as a parking area for the cement business. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 42

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a residential property that was purchased by the owners of the nearby cement plant in 1996. It remains in residential use. Though the owner was recently cited for illegally storing vehicles on the property, no records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10001



Lot	Present Use
1	Factory
19	Single Family
24	Single Family
25	Single Family
26	Single Family
27	Single Family
28	2 Family Detached
29	Single Family
40	Single Family
41	Single Family
124	Single Family

### Lot 1

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a newly remodeled industrial building owned by Abbott Industries. There is also a small parking lot on the property, which is likely a conglomeration of several separate properties that were acquired at various times.

### Lot 19

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story detached residential structure. No documentation has been found to indicate a previous use other than residential. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 24

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story residential structure and no documentation has been found to indicate any previous use other than residential. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 25

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story residential structure and no documentation has been found to indicate any previous use other than residential. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 26

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story residential structure and no documentation has been found to indicate any previous use other than residential. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 27

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story detached residential structure. No documentation has been found to indicate a previous use other than residential. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 28

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story detached residential structure. There have been several residential code violations on this property, however, no records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 29

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story residential structure. No documentation has been found to indicate a previous use other than residential. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 40

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story residential structure. No documentation has been found to indicate a previous use other than residential. A previous owner was cited for allowing larger than the permitted number of families to reside in the building, however, no records of spills or enforcement actions by environmental regulatory agencies were found.

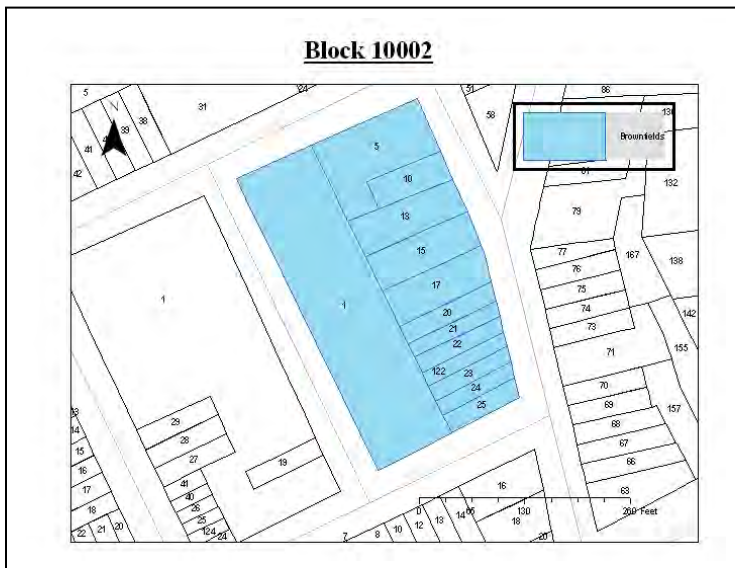
Lot 41

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story residential structure. Several code violations were found in 1987 and the property was later seized through foreclosure proceedings. It was purchased by the present owner in 2007. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 124

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a two-story residential structure. No documentation has been found to indicate a previous use other than residential. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10002



Lot	Present Use
1	Iron Works/Warehouse
5	Concrete Storage
10	Warehouse
13	Warehouse
15	Warehouse
17	Light Manufacturing
20	Warehouse
21	Mixed Use
22	Mixed Use
23	Mixed Use
24	Mixed Use
25	Mixed Use
122	Residential

### Lot 1

Reason for identification as a brownfield: **“e” designation by the City of New York.** This property has both a welding shop on it and a partially abandoned warehouse owned by Abbott Wire Products. The property has been in the hands of Abbott since at least 1974.

No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 5

Reason for identification as a brownfield: **“e” designation by the City of New York.** This property is owned by the owners of the concrete plant located across 95 Avenue. It appears to be used mostly for outdoor storage of stone and concrete products. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 10

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is an abandoned building that has been owned by Abbott Industries since at least 1976. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 13

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a warehouse owned by Abbott Industries. Abbott was cited for unsafe building conditions at the site in 2004, as it had fallen into disrepair and was exhibiting cracks along the exterior wall. It appears the exterior wall was either entirely replaced or rebuilt recently. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 15

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a garage housing some vehicles and equipment. It is owned by Joseph Schinco. JS Ornamental Iron Works operates in the building. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 17



Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a garage that has two different signs on it: “Sigo” and “Ajax Wire Speciality Co., Inc.”. No business activity was observed the day the property inventory was taken. The property is owned by Sigo Reality, which acquired it in 1983. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 20

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a garage that houses equipment and vehicles. It is owned by Clyde Mohan, though a business called “Plaza Homes LLC” applied in 2003 for a permit on the property to, among other things, place a curb cut in front of the building. No records of spills or enforcement actions by environmental regulatory agencies were found.

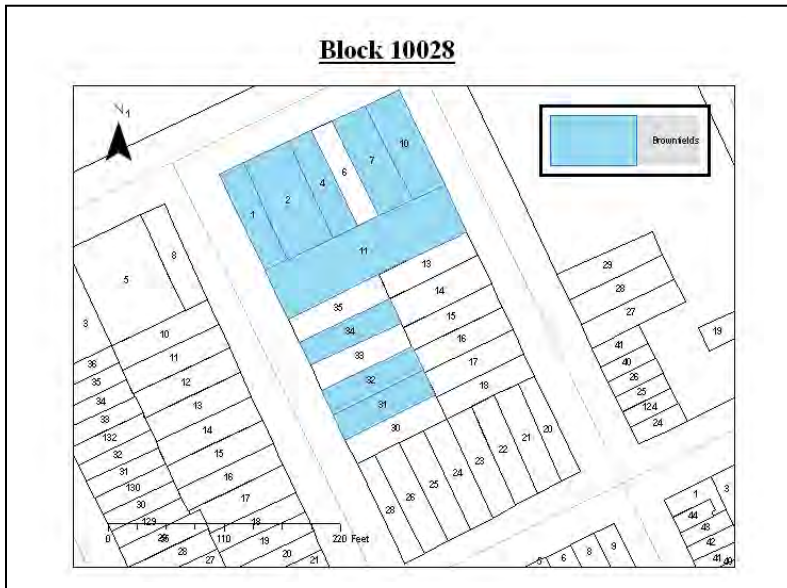
Lots 21, 22, 23, 24 and 122

Reason for identification as a brownfield: **“e” designation by the City of New York.** These five properties are adjacent, share the same owner and are essentially portions of the same building, which is a three-story brick structure with storefronts on the first floor and residential units on the upper floors. There have been several code violations documented at these properties since the 1970s, varying from doing work without a permit to pest problems.

Lot 25

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is the corner lot at the northwest corner of 150<sup>th</sup> Street and 97 Avenue. There is a restaurant on the first floor and residential units above. The owner was cited for improper maintenance of the roofing in 2004. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10028



Lot	Present Use
1	Cement Plant
2	Cement Plant
4	Single Family
6	Multi Family
7	Single Family
10	Single Family
11	Cement Plant
13	Single Family
14	Single Family
15	Single Family
16	Single Family
17	Single Family
18	Single Family
20	Multi Family
21	Multi Family
22	Multi Family
23	Multi Family
24	Multi Family
25	Multi Family
26	Multi Family
28	Multi Family
30	2 Family Detached
31	Single Family
32	2 Family Detached
33	Single Family
34	Single Family
35	Single Family

### Lot 1, 2, 11

Reason for identification as a brownfield: **“e” designation by the City of New York.** A concrete manufacturing facility operates on these three lots. Lot 1 received a building permit in 1999 to install a 400 gallon diesel oil tank. At least one building code violation has been issued for failure to properly maintain the structures. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 4

Reason for identification as a brownfield: **site of DEC-registered spill.** This lot is occupied by a two-story house. It is next door to a concrete manufacturing facility. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 7

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This lot is occupied by a two-and-a-half-story residential house. The house abuts a concrete manufacturing facility. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 10

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This lot is occupied by a two-and-a-half-story residential house. The house abuts a concrete manufacturing facility. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 31

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This lot is occupied by a two-story residential house. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 32

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This lot is occupied by a two-story residential house. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 34

Reason for identification as a brownfield: **“e” designation by the City of New York.**

This lot is occupied by a two-story residential house. A violation was previously issued on this property for failure to obtain proper work permits. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10030



### Lot 6

Reason for identification as a brownfield: **“e” designation by the City of New York.** This lot is currently occupied by a health care clinic. The building is a one-story structure. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 12

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is currently occupied by a wholesale distributor. The building is a one-story structure. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 15

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is currently used as an automotive repair facility. The building is a one-story structure. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 17

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot was historically used as an automotive repair facility. The building is a one-story structure. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 22

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is currently used as an automotive repair facility. The building is a one-story structure. No records of spills or enforcement actions by environmental regulatory agencies were found.

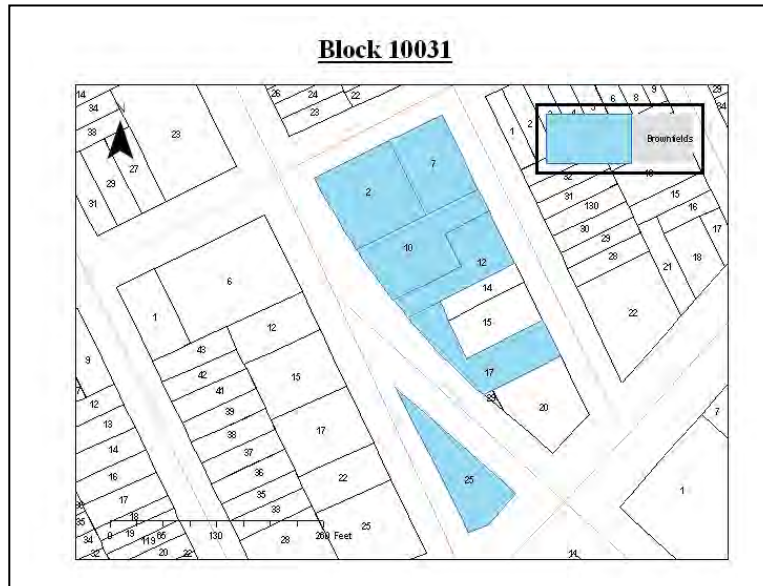
### Lot 25

Reason for identification as a brownfield: **“e” designation by the City of New York.** The site has historically been used as an automotive scrap/junk yard. Currently the lot is used for parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 28

Reason for identification as a brownfield: **“e” designation by the City of New York.** The site has historically been used as an automotive scrap/junk yard. Currently the lot is used for parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10031



Lot	Present Use
2	Warehouse
7	Manufacturing
10	Manufacturing
12	Retail
14	Vacant Warehouse
15	Office Building
17	Retail
20	Retail
25	Retail
29	Retail

### Lot 2

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot was historically used as a freight forwarding facility. The building has recently undergone a total refurbishment and is now a retail and office building. The building is a two-story structure. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 7

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is currently occupied by an industrial building. The building is a two-story structure. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 10

Reason for identification as a brownfield: **“e” designation by the City of New York.** The site is currently being used as an automotive scrap/junk yard with storage building. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 12

Reason for identification as a brownfield: **“e” designation by the City of New York.** The site has historically been used as an automotive scrap/junk retail sales and storage building. The site is currently being used as an automotive scrap/junk retail sales and storage building. No records of spills or enforcement actions by environmental regulatory agencies were found.

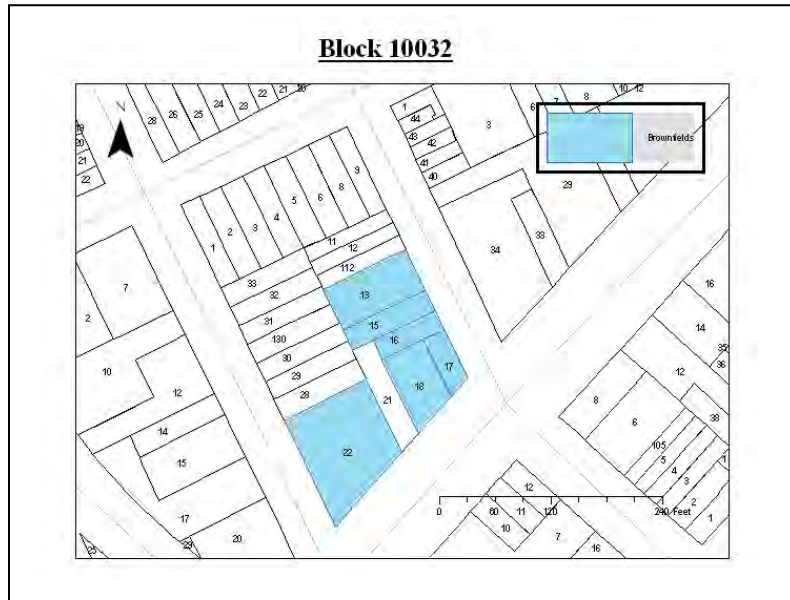
### Lot 17

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is currently occupied by a car wash. The building is a one-story structure. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 25

Reason for identification as a brownfield: **site of DEC-registered spill and “e” designation by the City of New York.** The site is currently a gas station. The owner was recently cited for erecting a fence without a permit.

## Block 10032



Lot	Present Use
1	Multi Family
2	Multi Family
3	Single Family
4	Multi Family
5	Multi Family
6	Multi Family
8	Multi Family
9	Multi Family
11	Parking
12	Multi Family
13	Warehouse
15	Parking
16	Parking
17	Offices
18	Private Club
21	Private Club
22	Manufacturing
28	Multi Family
29	Multi Family
30	Multi Family
31	Multi Family
32	Multi Family
33	2 family detached
112	Multi Family
130	Multi Family

### Lot 13

Reason for identification as a brownfield: **“e” designation by the City of New York.** The building on the property is a one-story garage/warehouse. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 15, 16

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lots are paved and used for parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 16, 17, 18<sup>15</sup>

Reason for identification as a brownfield: **“e” designation by the City of New York.**

The lots have common ownership. A building on the site was demolished some time between 1989 and 1999 and replaced by the one-and-a-half-story commercial building presently on the property. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 22

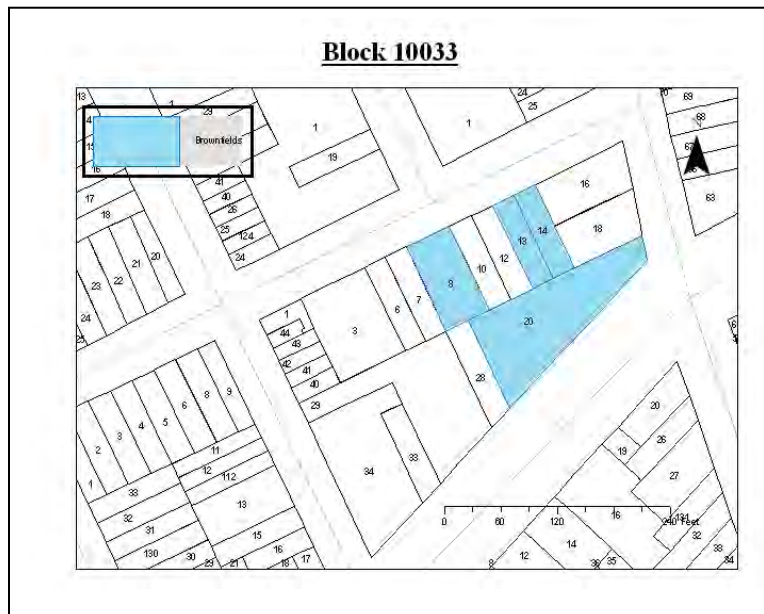
Reason for identification as a brownfield: **“e” designation by the City of New York.**

Among the uses on the lot is a retail/office space for a mason supplier. Outdoor space on the lot is used to store the mason supplies. No records of spills or enforcement actions by environmental regulatory agencies were found.

<sup>15</sup> According the NYC Department of Buildings records lots 16, 17 and 18 have been joined into one lot.



## Block 10033



Lot	Present Use
1	2 Family Detached
3	Garage
6	Multi Family
7	Multi Family
8	Multi Family
10	Parking
12	Multi Family
13	Multi Family
14	Parking
16	Warehouse
18	Auto Repair
20	Retail
28	Auto Repair
29	Vacant
33	Manufacturing
34	Retail
40	2 Family Detached
41	2 Family Detached
42	2 Family Detached
43	2 Family Detached
44	2 Family Detached

### Lot 8

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is paved and used for parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 13, 14

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lots are a contiguous paved parking lot used for truck parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

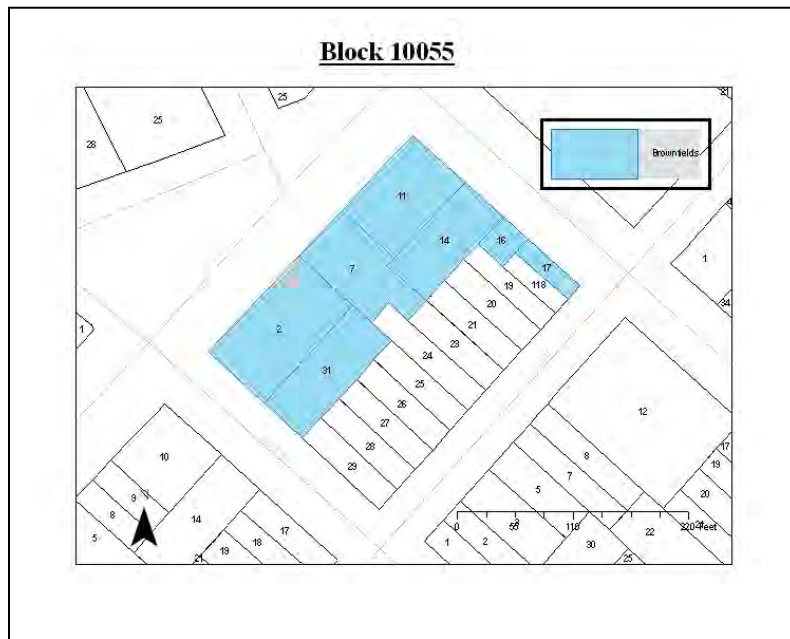
### Lot 20

Reason for identification as a brownfield: **site of DEC-registered spill.** The site is an active gas station. Three spills have been reported at this site.

### Lot 28

Reason for identification as a brownfield: **site of DEC-registered spill.** This is an active auto body shop occupying a one-story building.

## Block 10055



Lot	Present Use
2	Commercial
7	Parking
11	Retail
14	Retail
16	Junk Yard
17	Junk Yard
19	Vacant Lot
20	Multifamily
21	Multifamily
23	Multifamily
24	Multifamily
25	Multifamily
26	Multifamily
27	Multifamily
28	Office
29	Single Family
31	Single Family
118	Junk Yard

### Lot 2

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot currently has a small commercial building on lot previously used as a diner; the rest of the lot is for parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 7

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is used as a storage and parking yard. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 11

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot currently has a small commercial building on lot previously used as a diner; the rest of the lot is for parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 14

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is used as a storage and parking yard. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 16 and 17

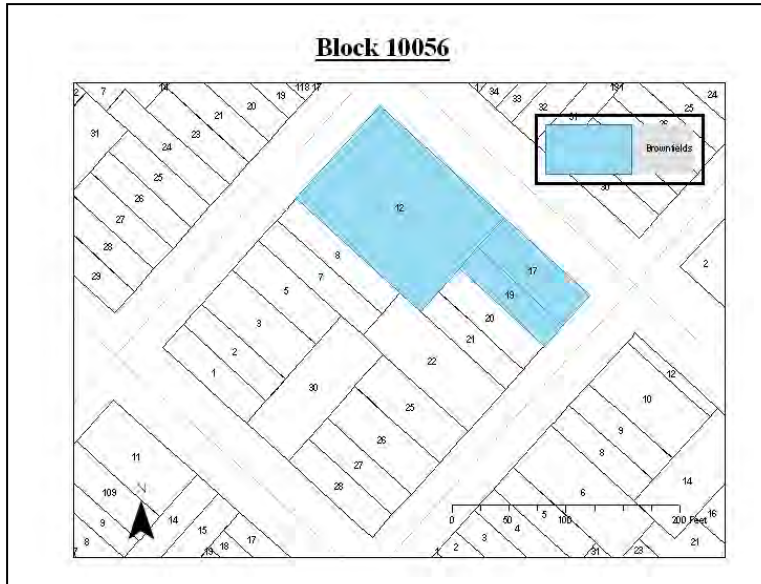
Reason for Identification as a Brownfield: **result of previous GJDC property survey.**

Both of these lots combine to form an auto repair shop and adjacent parking area. They have common ownership. No records of spills or enforcement actions by environmental regulatory agencies were found for either lot.

### Lot 31

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot currently occupied by a residential two-family house. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10056



Lot	Present Use
1	Multifamily
2	Multifamily
3	Multifamily
5	Multifamily
7	2 family detached
8	Parking
12	Offices
17	Parking
19	Multifamily
20	Multifamily
21	Multifamily
22	Parking
25	Multifamily
26	Multifamily
27	Multifamily
28	Multifamily
30	Multifamily

### Lot 12

Reason for identification as a brownfield: **site of DEC-registered spill.** A former auto collision repair shop. The site was sold in 1999 and redeveloped recently as an aids treatment clinic, Project Samaritan Aids Services, Inc.

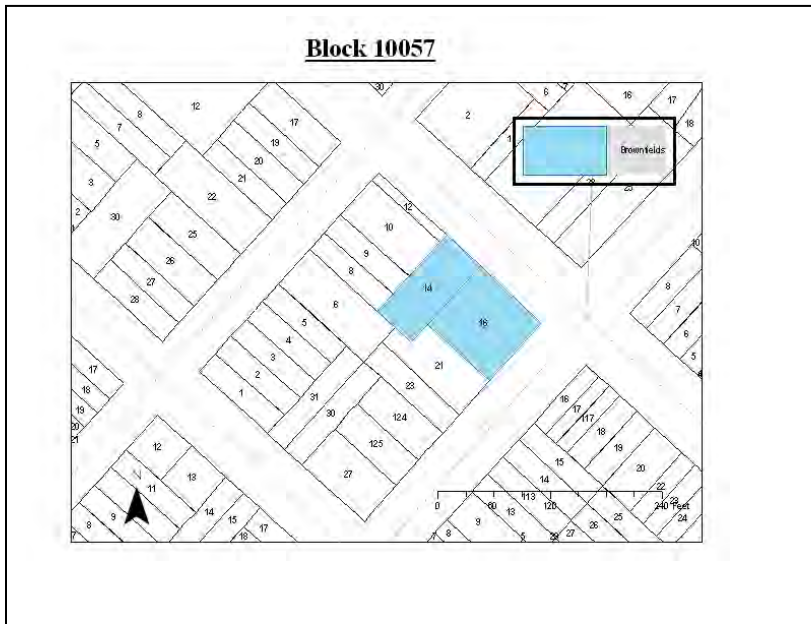
### Lot 17

Reason for identification as a brownfield: **“e” designation by the City of New York.** Currently used as a storage yard. Possible previously used as an auto repair facility. ECB violations include work without a permit and “Failure to maintain: defect is excessive accumulation of debris at time of inspection ie. used oil tanks, 55 gas drums used auto parts. remedy: remove debris clean up premises.” No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 19

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot occupied by residential house. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10057



Lot	Present Use
1	Multifamily
2	Multifamily
3	Multifamily
4	Multifamily
5	Single Family
6	Parking
8	Parking
9	Multifamily
10	Multifamily
12	Multifamily
14	Multifamily
16	Auto Repair
21	Multifamily
23	Multifamily
27	Multifamily
30	2 family detached
31	2 family detached
124	Multifamily
125	Vacant

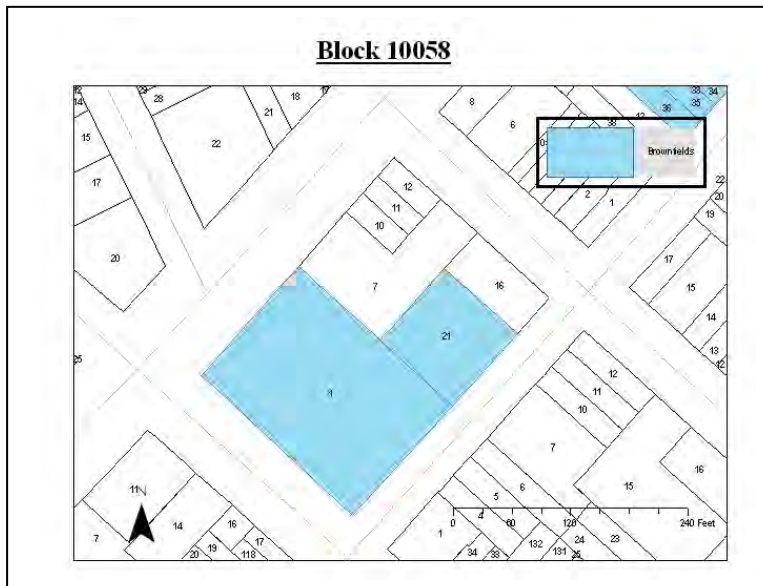
### Lot 14

Reason for identification as a brownfield: **“e” designation by the City of New York.** This is a lot and two-story structure. Previous use: auto junk yard. Current use: auto sales lot. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 16

Reason for identification as a brownfield: **“e” designation by the City of New York.** This property was previously used as an auto junk yard. It is currently a used car lot. The site has two past building code violations, one of which was for occupancy contrary to certificate. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10058



Lot	Present Use
1	Night Club
1	Auto Repair
1	Warehouse
7	Cement Plant
10	Cement Plant
11	Cement Plant
12	Manufacturing
16	Parking
21	Warehouse

### Lot 1

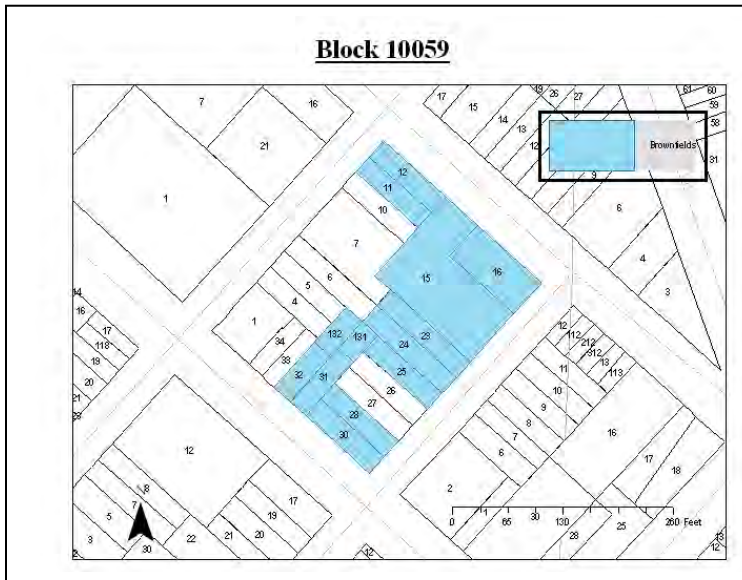
Reason for identification as a brownfield: **“e” designation by the City of New York.** The site has been cited many times for various ECB violations, including occupancy contrary to certificate of occupancy multiple times including operating as a recycling facility. An auto repair facility has also operated illegally on the lot. The site is currently used as nightclub and auto repair shop. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 21

Reason for identification as a brownfield: **“e” designation by the City of New York.** This lot is currently occupied by a one-story industrial building. No records of spills or enforcement actions by environmental regulatory agencies were found.



## Block 10059



Lot	Present Use
1	Retail
4	Single Family
5	Manufacturing
6	Manufacturing
7	Vacant
10	Vacant
11	Cement Plant
12	Cement Plant
15	Cement Plant
16	Cement Plant
23	Cement Plant
24	Cement Plant
25	Cement Plant
26	Multifamily
27	Multifamily
28	Multifamily
30	Auto Repair
31	Vacant storefront
32	Multifamily
33	Multifamily
34	Multifamily
131	2 family detached
132	2 family detached

### Lot 11

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is used for concrete truck parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 12

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lot is used for concrete truck parking. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 15, 16, 23, 24, 25

Reason for identification as a brownfield: **“e” designation by the City of New York.** These lots are used as a concrete manufacturing facility. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 28

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot currently occupied by a residential two-family house. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 30

Reason for identification as a brownfield: **“e” designation by the City of New York.** An auto body repair shop operates on the property. There have been two building code violations in the past on this property, one of which was for work that was performed without the proper permit. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 31

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot currently occupied by a residential two-family house. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 32

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot currently occupied by a residential two-family house. No records of spills or enforcement actions by environmental regulatory agencies were found.

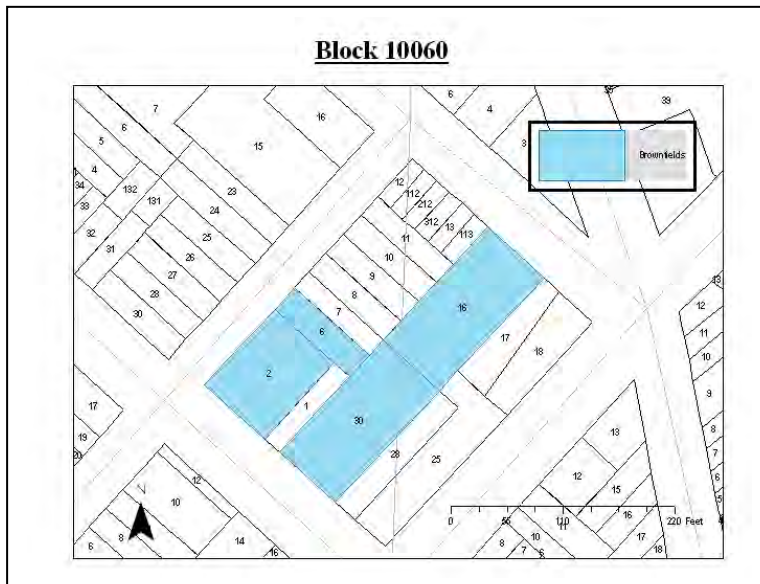
Lot 131

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot currently occupied by a residential two-family house. No records of spills or enforcement actions by environmental regulatory agencies were found.

Lot 132

Reason for identification as a brownfield: **“e” designation by the City of New York.** Lot currently occupied by a residential two-family house. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10060



Lot	Present Use
2	Manufacturing
6	Multifamily
7	Multifamily
8	Multifamily
9	Multifamily
10	Multifamily
11	Parking
12	Vacant
13	Vacant
16	Auto
17	Residential
18	Parking
18	Auto Repair
25	Manufacturing
28	Vacant
30	Vacant
30	Retail
112	Vacant
113	Vacant
212	Vacant
312	Vacant

### Lot 2

Reason for identification as a brownfield: **“e” designation by the City of New York.** Brick one-story distribution warehouse, previous use unknown. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 6

Reason for identification as a brownfield: **“e” designation by the City of New York.** The site is currently occupied by a residential two-family house. No records of spills or enforcement actions by environmental regulatory agencies were found.

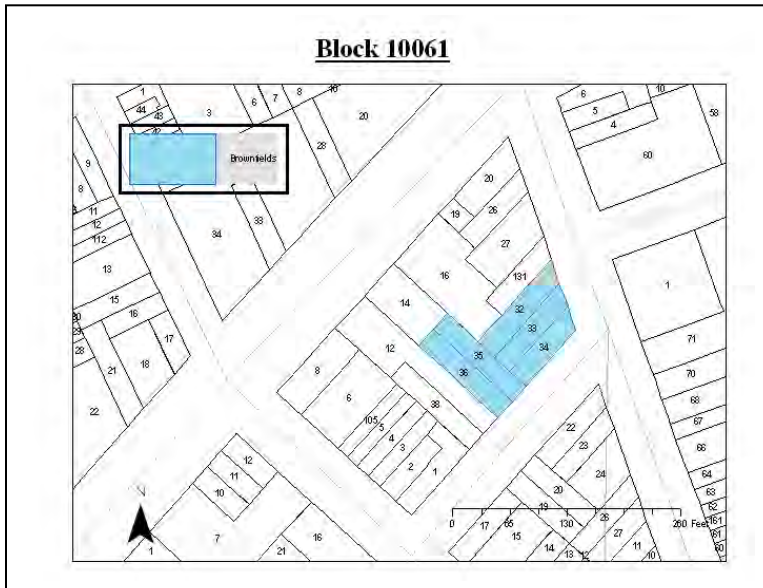
### Lot 16

Reason for identification as a brownfield: **“e” designation by the City of New York.** Currently used as storage yard, historically it was used as an auto junkyard. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 30

Reason for identification as a brownfield: **“e” designation by the City of New York.** A two-story brick building sits on this property, consisting of two commercial units. One is occupied by a small grocery store. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10061

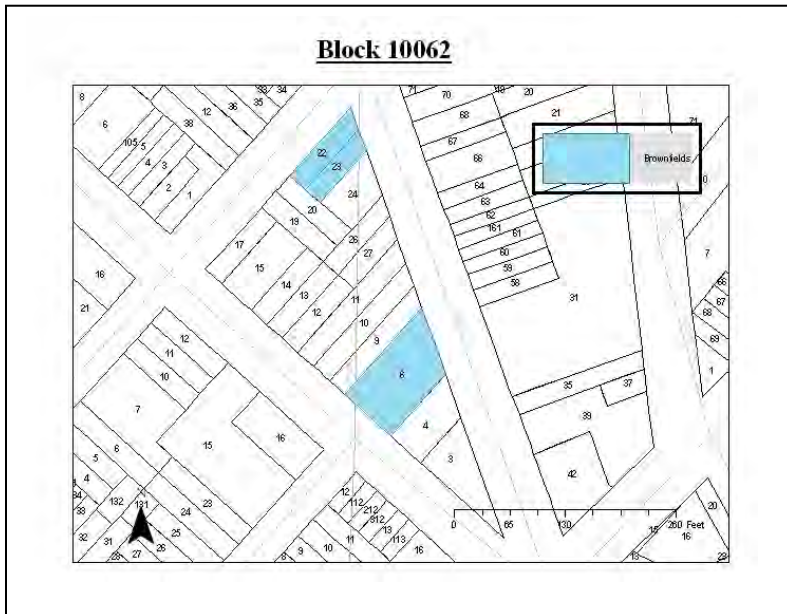


Lot	Present Use
1	Multifamily
2	Parking
3	5 family detached
4	4 family detached
5	3 family detached
6	Truck Repairs
8	Auto Repair
12	Machinery Sales
14	Auto Repair
16	Auto Repair
19	Auto Salvage
20	Auto Salvage
26	Retail
27	Vacant Retail
32	Cement Plant
33	Cement Plant
34	Cement Plant
35	Warehouse
36	Warehouse
38	Auto Repair

### Lots 32, 33, 34, 35, 36

Reason for identification as a brownfield: **“e” designation by the City of New York.** The lots are currently used as a storage yard for a nearby concrete company. Lot 36 has a metal storage structure. No records of spills or enforcement actions by environmental regulatory agencies were found.

## Block 10062



Lot	Present Use
3	Warehouse
4	Warehouse
6	Auto Salvage
9	Manufacturing
10	Manufacturing
11	Manufacturing
12	Manufacturing
13	2 family detached
14	2 family detached
15	2 family detached
17	Parking
19	Parking
20	2 family detached
22	Offices
23	Offices
24	Warehouse
26	Warehouse
27	Warehouse

### Lot 6

Reason for identification as a brownfield: **“e” designation by the City of New York.** This lot is currently occupied by a vacant metal outdoor auto salvage storage structure. It has historically been used as a storage facility for auto salvage parts. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 22

Reason for identification as a brownfield: **“e” designation by the City of New York.** This lot is currently used as a parking lot for a neighboring electrical contractor. No records of spills or enforcement actions by environmental regulatory agencies were found.

### Lot 23

Reason for identification as a brownfield: **“e” designation by the City of New York.** This lot is currently occupied by an electrical contractor. No records of spills or enforcement actions by environmental regulatory agencies were found.

### **3.3(D) Existing Land Use and Zoning – Liberty Gateway BOA**

There are 284 total lots in the Liberty Gateway BOA, 140 of which are residential. Approximately 31% of the total lots are commercial and there are 51 industrial parcels. Unlike the other three BOAs, Liberty Gateway has several blocks that are predominantly residential. These are in the southern and central portions of the BOA. The northeast corner is dominated by industrial uses while the commercial uses line the main traffic corridors of Sutphin Boulevard and Liberty Avenue.

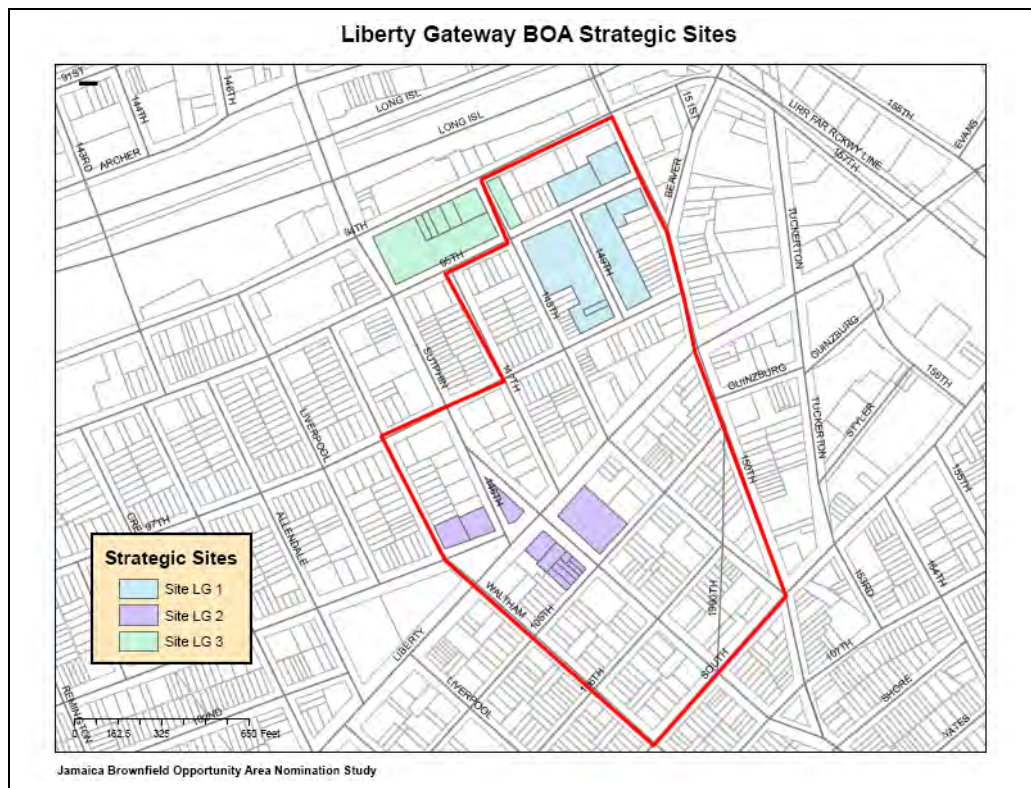
The zoning in the Liberty Gateway BOA is consistent with the existing land use pattern. Residential zones are located in the central and southern portions of the BOA, while M1-4 covers the northeastern portion. Generally the commercially zoned properties are those that front on either Sutphin Boulevard or Liberty Avenue, though there are three blocks that are entirely zoned commercial north of the intersection with Sutphin and Liberty.

### **3.4(D) Abandoned, Vacant and Underutilized Sites – Liberty Gateway BOA**

The Liberty Gateway BOA has a number of vacant properties (see Figure 4, page 28). The greatest concentration of these properties is in the southeast corner. These lots, zoned for residential use, are either wholly abandoned or partially abandoned with trash strewn and/or junked vehicles parked on them. Only a long-term and successful economic revitalization of the entire BOA Study Area and of Downtown Jamaica, in general, will bring reinvestment to this corner of the Liberty Gateway BOA given the challenges here.



### 3.5(D) Strategic Sites – Liberty Gateway BOA



Liberty Gateway Site 1: Block 10000 Lots 24, 31; Block 10001 Lots 1, 19; 10002 Lots 1,5

Site LG 1 contains an electrical supply warehouse and concrete plant on Block 10000. The two properties on Block 10001 are another warehouse and a residence. Block 10002 has a semi-abandoned warehouse and an open fenced lot that is used for outdoor storage of concrete products.

A redevelopment scenario has been developed for LG 1 and is included in Section 2. The recommended reuse is for an industrial warehouse or an industrial/retail hybrid use. It was selected as a strategic site because of the comparatively large parcels, the perceived contamination on the site and the small amount of residential development. Appropriate redevelopment of this site could result in a reduction of truck traffic along 150<sup>th</sup> Street and could improve quality-of-life for residents on surrounding blocks.

Liberty Gateway Site 2: Block 10030 Lots 25, 28; Block 10055 Lots 11, 14, 16, 17, 118, 19, 20, 21; Block 10058 Lot 1; Block 10031

This strategic site surrounds the intersection of Liberty Avenue and Sutphin Boulevard and includes twelve properties surrounding it. The properties on Block 10030 are both parking lots surrounded by unsightly fences and trash is strewn around the exterior of them. Block 10031 is the gas station located in the median. The property on Block 10058 is the Club Tobago night club.

The series of adjacent properties on block 10055 include an auto body repair shop, a small restaurant, parking lots and two residences.

A redevelopment scenario has been developed for LG 2 and is included in Section 2. The recommended reuse is a mixed retail/residential use. It was chosen as a strategic site due to it being a high visibility intersection that is physically unattractive, underutilized and potentially dangerous due to its poor design. Redevelopment of the site will further two important objectives identified in the public outreach process: reduction of traffic conflicts with auto-oriented uses in the area, improve visual quality along Liberty Avenue. . Infrastructure needs particular to this site can be found in Appendix D, Summaries of Consultant Products, Executive Summary 1: Area/Infrastructure Analysis.

#### Liberty Gateway Site 3: Block 9999 – Entire Block, Block 10000 Lot 1

LG 3 is the site of the former Merkel meat-packing plant. It is also Site SA 2, as the site straddles the boundary of both the Liberty Gateway BOA and the Station Area BOA. The building has been demolished, however, the project that had been initially planned for the property has been replaced with a new plan for a mix of uses including low-income housing, retail and possibly parking.

This property is located on the opposite corner of the AirTrain terminal. Its location is exceptionally convenient for anyone exiting either AirTrain or the LIRR. It also lies along the future One-Way Pair and, therefore, will have ample access for deliveries. The current plan for low-income housing on the site is inappropriate given the location of the property. The future use of the property should focus on the retail and commercial components necessary to move revitalization of the Station Area forward.

### Land Ownership Pattern

There are four non-adjacent publicly owned properties scattered across the Liberty Gateway BOA. The owner of the concrete plant along 95<sup>th</sup> Avenue has acquired some adjacent residential properties but this is the only notable effort at site assembly in the entire BOA. Due to site assembly challenges the strategic sites that have been selected are those that have a small number of larger lots. As redevelopment is not proposed nor contemplated for the residential blocks in Liberty Gateway, the large number of private property owners on those blocks is inconsequential.

### **3.6: Economic and Market Trends Analysis**

The Brownfield Opportunity Area program provides communities with a unique opportunity to examine a range of issues in a comprehensive manner in a geographically defined area where environmental concerns are particularly acute. One key component of this comprehensive examination is economic development. While public funding through such programs as New York State's Environmental Restoration Program may be available for projects that involve the remediation of brownfields, a market for the desired end-use of the property must exist in order to attract investment from the private sector. The need to demonstrate such demand is especially acute given the economic stagnation that has occurred in Jamaica in past decades.

Downtown Jamaica has also historically existed as a transportation and retail hub for Southeast Queens. As Jamaica strives to diversify itself economically in the future, it is essential to demonstrate demand for uses in addition to those related to transportation and retail. Recognizing this, GJDC, in conjunction with NYSDOS, commissioned a market demand analysis as part of the BOA Nomination Study process that covered a range of potential uses. The full analysis is attached as Appendix C.

#### **General Demographic Trends**

Jamaica is located within Queens County, which is the most ethnically diverse county in the United States. It is also the largest borough geographically among the five in the City of New York and is the home of both of the City's airports. The City of New York, as part of a study commissioned through PLANYC in 2006, projects that the population of Queens will increase between 0.2 and 0.7 percent annually through 2030, a rate greater than that of the City as a whole.

In addition to an increase in the number of residents in Queens County, the socio-economic characteristics of the population are expected to change. In the vicinity of the BOA Study Area, the number of households earning between \$150,000 and \$200,000 is expected to grow annually by a dramatic 18 percent between 2006 and 2011. At the same time, the number earning less than \$75,000 is expected to decrease at an annual rate of 4% over the same period.

Jamaica is also quite young in comparison to other parts of both the City of New York and Queens County. In and around the BOA Study Area, more than 18% of the population is between the ages of 25 and 34. Over the next five years, those aged 15 to 24 are expected to increase by 10%. Younger populations, beyond their potential for retail spending, also provide a significant pool of labor for employers.

In addition to its large proportion of young residents, Jamaica will experience dramatic growth in its 55- to 64-year-old population over the next five years. This is consistent with a nationwide trend as the "baby boom" cohort continues to age. Much commercial success has been achieved by marketing products and services to this cohort over several decades. There will likely be future opportunities for Jamaica housing development for this generation's changing needs.

#### **Retail Market**

Jamaica has two significant characteristics that make it an attractive location for retail development. Jamaica's population is young and retailers have consistently achieved success by targeting its products to those in their late teens and early 20s. Jamaica is also an established regional retail destination, attracting shoppers from a wide geographic area.

Jamaica's status as a retail hub is returning, following the departure of the major department stores during the urban decline of the 1950s and 1960s. In fact, Jamaica has been experiencing a resurgence over the last several years with many national chains, such as Old Navy and Nine West, opening stores on or near Jamaica Avenue. Vacancy rates remain low and rents high along this retail corridor, further indicating its retail strength.

Despite this robust retail activity, Jamaica remains an "exporter" of retail spending. As demonstrated by the market demand analysis in Appendix C, when considering the income levels in and around Jamaica and the amount of retail space in the same area, residents are spending a substantial amount of their retail dollars elsewhere. Potential to capture additional retail dollars is especially strong in the categories of general merchandise, food/beverage and food service and drinking establishments. Anecdotal evidence supports the data in this circumstance, as Jamaica residents frequently lament a lack of "tablecloth" restaurants in the downtown area.

Retailers remain anxious to tap into this unmet demand in Jamaica. This is evidenced by the character of retail development that has occurred recently in the downtown area. Home Depot completed construction of a store on Merrick Boulevard in 2007 on the site of the former Long Island Press. Marshall's also opened a store in 2007 on Jamaica Avenue.

As with most neighborhoods in New York City, site assembly is a challenge in Jamaica. The 613,000 square-foot Home Depot site, for example, is actually nine tax lots. Retailers have, and will likely continue to, overcome such obstacles when the proper level of demand has been reached and Jamaica's record of success in retail and demographic and geographic advantages will likely make it an attractive location for such retailers in the future.

## **Residential Development**

Jamaica has experienced a modest, but real, "residential renaissance" over the past decade. Market rate residential condominium development has occurred in downtown Jamaica for the first time in over 30 years. At the same time, however, Jamaica has significant exposure to the unfolding sub-prime lending crisis. The long-term potential for residential development in the vicinity of the BOA Study Area remains strong though the immediate impacts of a build-up of inventory will be a reduction in investment in residential properties by the private sector.

The sources of demand for housing in Jamaica include existing residents looking to downsize or move into new housing, those from other parts of the borough moving into Jamaica, and those new to Queens. Regarding those moving within Queens, the 2005 US Census Bureau's American Community Survey estimates that 6.5% of Queens households moved within Queens over the past year. At the same time, the Internal Revenue Service estimates that 38,960 households move into Queens in 2004, the most recent year for which data is available. Nearly 80% of these households moved from another part of the tri-state area. Using a fair share analysis by distributing an estimated total new annual future demand for 81,265 housing units across Queens, Community District 12 can expect a demand for 7,300 housing units annually.

The existing housing stock in Jamaica consists predominantly of single-family and two-family detached homes, with 84% of all lots in Community District 12 devoted to this type of development. As Queens, and the City of New York in general, has become largely built-out since the 1950s, new residential construction is now typically infill development or redevelopment of under-utilized properties and multi-unit. Jamaica is no exception. Several condominium and apartment projects have been launched in or planned for Downtown Jamaica over the past 5 years. They include the Parsons-Windsor Condominium, Yorkside Towers and Briarwood Terrace. Most recently, the Old Family Court Project will turn retain the façade of an historic public building and construct behind it a mixed use project with retail space and rental and condominium housing of over 380 units.

The City of New York also recently re-zoned significant portions of Jamaica to permit higher-density residential development. The Department of City Planning estimates that the BOA Study Area can accommodate an additional 10,755 new residents with the rezoning. Over the long-term, the rezoning will likely make Jamaica a more affordable alternative to other more expensive residential options in Manhattan and the more affluent suburban communities of Long Island.

## Office/Commercial Development

Despite Jamaica's ample transportation infrastructure and key geographic location along the Long Island Railroad and several subway and bus lines, commercial office development has largely bypassed Jamaica. This is reflected in the land use pattern, which has and remains largely residential. This is true of the entire borough, however, as there remain relatively few hubs of commercial office space in Queens. One exception is the Long Island City area of western Queens where Citigroup has begun construction of a 528,000 square foot office tower.

The overall demand for office space has increased in several industries since 1990 in New York City. Among them are health care, education, financial services and information technology. Demand is expected to increase for such space in Queens in future years in these industries and others. An estimated 450,000 square feet of additional office space will be needed in Queens annually. Distributing this demand across the borough over a five year period, Jamaica would see demand for 950,000 additional square feet of office space.

**Table 6 - Projected Annual Employment Growth and Demand for New Office Space in Queens County (2007-2014)**

<b>Occupation</b>	<b>Projected Office-Using Employment</b>	<b>Demand for Office Space <sup>1</sup></b>
Management Occupations	105	26,000
Business and Financial Operations Occupations	205	51,000
Computer and Mathematical Occupations	148	37,000
Architecture and Engineering Occupations	30	7,000
Life, Physical, and Social Science Occupations	8	2,000
Community and Social Services Occupations	336	84,000
Legal Occupations	54	13,000
Arts, Design, Entertainment, Sports, and Media Occupations	74	19,000
Healthcare Practitioners and Technical Occupations	231	58,000
Healthcare Support Occupations	222	56,000
Protective Service Occupations	8	2,000
Sales and Related Occupations	254	64,000
Construction and Extraction Occupations	141	35,000
<b>Total, All Occupations</b>	<b>1,816</b>	<b>454,000</b>

Source: New York State Department of Labor; Economics Research Associates

<sup>1</sup> Assumes 250 square feet per employee.

In addition to this 950,000 square feet of demand, Jamaica is poised to compete with other parts of Queens and the New York metropolitan area. Jamaica enjoys superior access to interstates, parkways, transit and commuter rail. Jamaica also has arguably the strongest not-for-profit development corporation in the City in Greater Jamaica Development Corporation, which has facilitated several important urban revitalization initiatives in Downtown Jamaica over the past 40 years. The City of New York has also advocated for more careful planning of employment centers in the New York metropolitan area in supporting the concept of sustainable development and seeking to stabilize the number of vehicle miles travelled to work.

Jamaica has the resources and assets necessary to substantially increase commercial office development in future years. The geographic advantages coupled with a City and not-for-profit commitment to increasing these opportunities have the potential to lift Jamaica to a position of leadership among the existing commercial office centers in Queens. Such development would also provide employers with the opportunity to tap into an existing and growing pool of young residents entering the workforce.

## Industrial/Flex Development

Jamaica has a long industrial history and a remarkably intact industrial base given the challenges facing such development throughout New York City. The historically strong access to rail transport gave rise to many metal working shops over the course of many years and Jamaica has always had a strong food processing industry. Jamaica also has an Industrial Business Zone, a City-designated area within which industrial businesses enjoy additional incentives and services.

Possibly the greatest challenge facing industrial development in New York City is the high cost of real estate and the continued conversion of industrially-zoned properties to residential uses. This trend has coincided with the population growth that has occurred in the City throughout the 1990s and into the 2000s. As demand for housing has increased over this period residential development has proven more profitable for property owners and developers.



Some trends suggest that this strong residential development pressure will ease in the future, particularly in the outer boroughs. According to the most recent market reports (2<sup>nd</sup> Quarter 2008), the number of residential sales in Brooklyn and Queens have dropped sharply year-over-year. If such weakness continues we will see a substantial build-up in residential inventory, thereby eroding the profit incentive for conversion of industrial properties to residential.

National and international economic forces are also working in favor of American manufacturers. The US dollar is at its weakest point in decades, making American-manufactured goods more affordable in international markets. Communities throughout the United States that were largely crippled by the exodus of manufacturing jobs overseas in the 1970s and 1980s began to experience a resurgence prior to the global downturn in 2007-08.

The market study attached as Appendix C identifies electronic and mechanical technical service providers, wholesale trade companies and warehouse distribution and logistics firms as the types of industrial users most likely to locate to Jamaica. Jamaica also can be regarded as an attractive alternative for existing industrial users in the City that have tried unsuccessfully to expand in areas that have been re-zoned to residential. The market study also posits that larger industrial/flex facilities with an anchor tenant are the most likely type of industrial development that Jamaica will attract and while manufacturing employment has declined there remain several such companies throughout the City.

Jamaica also has superior access to transportation infrastructure as compared to other parts of the New York Metropolitan Area, with the Long Island Expressway and Kennedy Airport in close proximity. The large number of bus and subway lines that run into and through Downtown Jamaica also make it more easily accessible for employees. This shipping and commuting advantage is important consideration for many existing companies in Jamaica, such as warehouse/distribution companies that benefit from a central location convenient to Manhattan, JFK Airport and markets in Long Island and industrial companies with a significant number of employees without access to private automobiles.

## **Summary of Market Demand Findings**

Jamaica's advantages over other parts of the New York Metropolitan Area that have experienced more intense development pressure and its locational advantages in relation to the regional transportation network position it well for future growth. This development potential is further enhanced by a variety of factors including:

- The presence of several key underutilized industrial properties that can be packaged and marketed to developers and/or potential industrial anchor tenants
- Demographic characteristics that demonstrate that Jamaica could easily capture more dollars from consumers if the number and variety of retail opportunities were increased
- Existing development incentive programs in Downtown Jamaica, including the Empire Zone and the Industrial Business Zone
- A recent rezoning that has increased the potential development density and profit incentive for residential and commercial developers

- Successful new condominium and apartment residential development projects in Downtown Jamaica in recent years that meet a growing demand for greater choice of housing in an area largely dominated by one-family and two-family detached housing

### 3.7 Summary Analysis, Findings and Recommendations

The Jamaica BOA Nomination Study, preparation of which began in May 2006, has involved the collaboration of a range of partners and stakeholders pursuing the common objective of achieving neighborhood revitalization while addressing the complexities of brownfield redevelopment in the community. The Study's recommendations encompass consideration of factors such as current conditions in the real estate market, community-wide and site-specific infrastructure needs, availability of public and private funding for redevelopment projects and needs identified through community outreach. During the four years over which the Study has taken shape the City of New York has experienced a substantial shift in the overall state of the economy and the outlook for redevelopment which has necessitated a continuous reexamination of priorities and the feasibility of proposed actions.

At the start of the BOA Nomination Study the City was in the midst of one of the largest expansions in residential real estate development in the City's history. According to the City's Department of Housing Preservation and Development of Buildings, more building permits for privately owned housing in the City were issued in 2007 than in any year since 1972. Jamaica was no exception as evidenced by the level of private investment in housing in Downtown Jamaica, which had not experienced such investment in since the 1960s. What followed was what many regard as the inevitable collapse of the real estate "bubble", as residential development ground to a halt under the weight of a national credit crisis and recession by the end of 2008.<sup>16</sup> Financing for redevelopment of the kind examined in the BOA Nomination Study has stagnated as a result. The process for implementation of the Study and the Action Items identified have been adjusted and re-prioritized to reflect these conditions.

While demand for housing and opportunities for commercial and retail development are expected to return in the future, the catalyst for these opportunities remains the Station Area and its ample transportation infrastructure. This infrastructure, including the AirTrain and LIRR station, are Jamaica's most powerful long-term asset in pursuing economic revitalization. This reality is reflected in GJDC's current applications for additional BOA funding.

GJDC is submitting an application for Step 3 funding for several activities to be conducted in the Station Area BOA. The application reflects the need to redesign key infrastructure in the Station Area BOA, increase the amount of open space in the area, expand and strengthen the business improvement district and facilitate the redevelopment of certain strategic sites by conducting additional studies and marketing efforts. Redevelopment in the Station Area BOA remains the top priority due the significant potential in the area and the need to capitalize on infrastructure investments there. Step 3 applications for the Western Gateway BOA, Tuckerton BOA or Liberty Gateway BOA will not be submitted at this time because of the need to focus existing efforts on the Station Area. Redevelopment of the remaining three BOAs has been identified as a priority in the community and Step 3 activities will be pursued there in the future.

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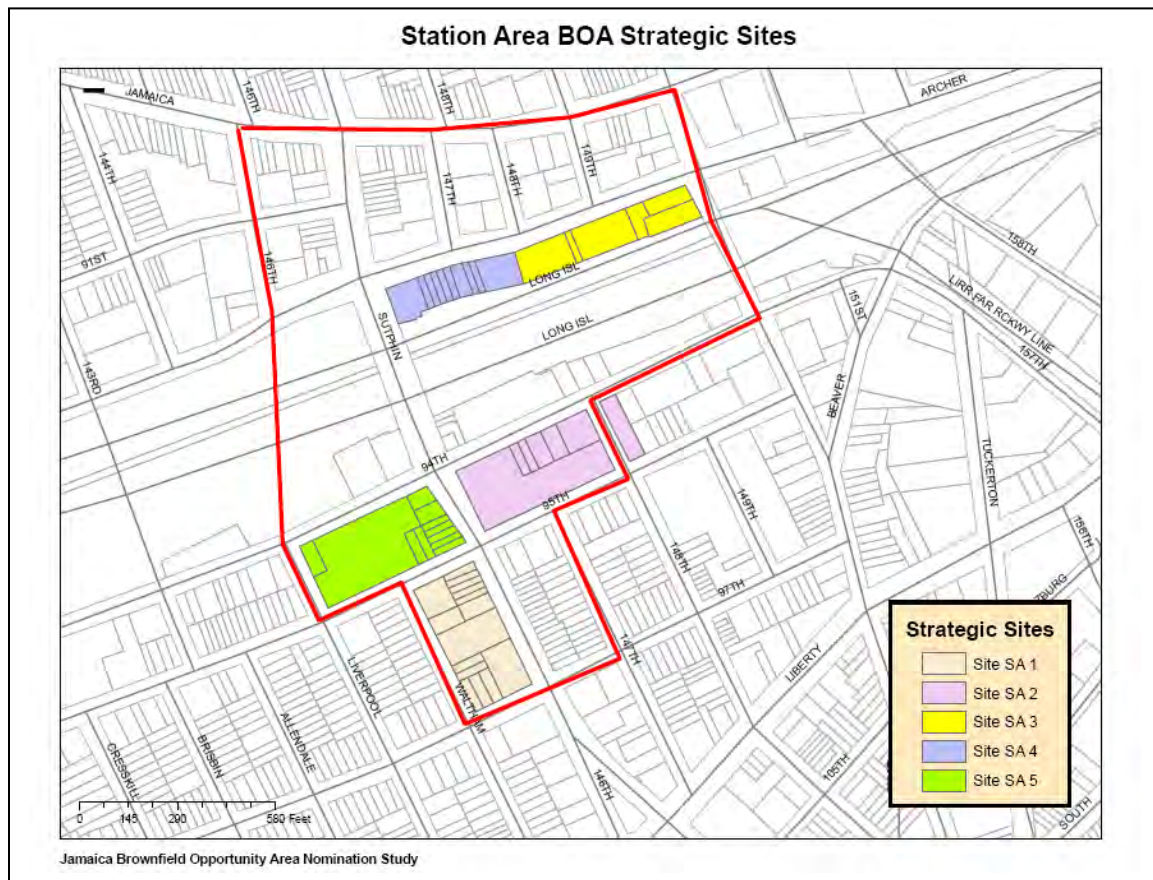
<sup>16</sup> *Craigs, Building Permits Plunge in NYC*, November 26, 2008.

## Station Area BOA

### Priority Action Overview

The Station Area BOA is the transportation center of Jamaica and, due to its high potential both to generate business activity and to transform the neighborhood economically, redevelopment here is the community's highest priority. Property owners in the Station Area have not yet fully leveraged the advantages of access to inter-modal transportation and up-zoning presented by this key location and its access to large numbers of commuters. This is changing, however, with the planning and pre-development of several important development projects including two hotels, retail and affordable and market-rate housing. Current market conditions have documented a softening in demand for housing across the entire City, however, strong long-term demand for higher-density housing in close proximity to the transit hub is expected to return, as well as that for both regional and local retail uses. Efforts continue to fully develop the economic development model of the Station Area as a destination, not merely a transfer point, as Downtown Jamaica is already regarded from a retail perspective.

Redevelopment in the Station Area BOA should focus on improving amenities for neighborhood residents and travelers and enhancing the physical appearance of the area, which will include parks and recreational uses, new service businesses, retail, a variety of new housing styles, beautification efforts and infrastructure improvements. Within the Station Area remain some low-rise uses that do not adhere or contribute to the transit-oriented development concept and future efforts to redevelop additional properties will need to be consistent with this model. The concept of transit-oriented development must progress further in the Station Area.



## Short-Term / High Priority

### Site-specific Marketing Tasks

Four sites in the Station Area are assembled or in negotiation for assemblage and two of these have been cleared. Marketing activities for three of these sites will include promotional campaigns, presentations, tours/visits for prospective users and developers and limited advertising. The fourth site, Station Area Strategic Site 1 is, as noted above, already fully assembled and planned for a private hotel. The market potential for each of these sites varies depending on a range of factors including size and location. For this reason, the marketing tasks will vary from site to site. The sites that require marketing include:

#### *Station Area Strategic Site 4*

A significant marketing effort and supporting studies are required to achieve consensus among key decision-makers for the proposal to build a four-star, full-service hotel directly connected to AirTrain via a foot-bridge and for an office building accommodating airlines and related airline and airport activities. A **hotel demand study** that includes a thorough analysis of the demographics of those traveling in and out of JFK Airport, the development of financial models and market research is required. In addition to this study, a **feasibility study** for this project is also required in order to secure the necessary financing and attract public and private investment. The feasibility study will include an economic impact analysis focusing on short-term impacts such as creation of construction jobs as well as medium-term and long-term impacts on future development and permanent job creation. The study must also address the potential safety and security issues associated with the proposal.

Another essential component of the marketing initiative for this site is the development of design specifications and a design prototype. There are perceived design challenges associated with the foot-bridge proposal and these must also be addressed through the development of design specifications. A prototype design of conference and food and beverage facilities must be generated and shared with food and beverage providers at International Council of Shopping Centers.

Once the above studies are complete, the appropriate marketing materials should be developed and a **marketing initiative** launched. It will target hotel developers, hotel flags, retail tenants, hotel and restaurant operators, venture capital funds and commercial lenders. This initiative must include the creation of partnerships with international trade offices at State and City economic development agencies to support the marketing of the hotel to overseas clients. It must also market the food and beverage opportunities associated with the full service hotel to the restaurant and food service industry.

#### *Western half of Station Area Strategic Site 3 (Block 9998, Lots 110, 109, 101)*

This site has been cleared and is planned for two interconnecting Marriott-brand limited service hotels. Financing is being sought and a supportive **marketing effort** is required to attract developers, hotel flags and travelers. This marketing effort will require a **study of hotel demand** similar to that proposed for Strategic Site 4 which will identify current economic trends and provide a profile of JFK business travel demographics. A **feasibility study** is necessary to support the financing. **Marketing materials** must be created and dis-

seminated to enable effective outreach to the target market, including industry advertising. This includes **web-based** promotion and insertion of hotel features into re-designed **brochures** promoting Downtown Jamaica. To ensure that the marketing effort is appropriately calibrated, a **study of the development incentives** available for this property must be completed with a component that includes **long-term technical assistance** for investors seeking to access the incentives.

#### *Station Area Strategic Site 2*

A basic **marketing** effort will promote this site's attractiveness for airline and airport-supportive facilities including employee services and parking. This marketing effort must target equity investors, developers for build-out, airlines, airline service contractors, contractor training organizations, government agencies associated with airline operations (FAA, TSA), airline support facilities (e.g., daycare and medical clinic), freight forwarders and aviation-related finance. To enable this marketing effort and arm it with the necessary information a **mixed use feasibility study** will be commissioned. A **parking needs study** is necessary to bolster the argument that the existing lack of parking in the area and the needs of new development will require a related parking facility on the site. **Promotional brochures** will feature the convenience of AirTrain to JFK and the rest of the City. The marketing campaign must also be calibrated to bring in international carriers and other tenants.

#### Design and Engineering Study for Archer Avenue between Sutphin Boulevard and 150<sup>th</sup> Street

The section of Archer Avenue between Sutphin Boulevard and 150<sup>th</sup> Street is devoid of street amenities and adequate street lighting. The current design, particularly the curbing and sidewalks, is not suitable for the planned redevelopment on Station Area Strategic Site 3. It is also inconsistent with the design elements included in the Station Plaza Project. A **design and engineering study** is required to provide appropriate designs for new sidewalks, landscaping, curbs and street lighting along this block of Archer Avenue.

#### Rehabilitation of 150<sup>th</sup> Street Underpass

The design of the 150<sup>th</sup> Street Underpass makes it awkward and difficult to navigate for motorists and pedestrians. Inadequate **lighting** and narrow **sidewalks** compound the problems of a curving roadway. Parking, in particular, is problematic because of the angling of the **curbs**. Addressing these issues is complicated by ambiguity of the roles and responsibilities of the Long Island Railroad and the New York City Department of Transportation for the maintenance or improvement of the underpass. Conditions here will be improved by rehabilitating the underpass with new lighting and a redesigned roadway that eliminates the obstructions for pedestrians and motorists. In tandem with the **design study**, the roles of the parties responsible for maintaining different aspects of the underpass must be identified and formally assumed. This process may require execution of an agreement between the parties.

#### Signature Park

The community and the project team have noted a lack of recreational or open space in Downtown Jamaica. An action item is to create a "Signature Park" adjacent to AirTrain along Sutphin Boulevard on the eastern side of Station Area Strategic Site 5. A hotel development is already planned for Strategic Site 1 immediately south of Site 5. This will require a **recreational needs analysis**, a **design study** for the Signature Park, **acquisition** of the property, identification or creation of an entity to maintain the Park, **construction** of the Park and the **purchase and installation of park amenities** such as benches. All of these activities will involve a procurement process to identify and contract with the appropriate parties to complete these steps.



### Sutphin Boulevard Business Improvement District Expansion

The area of Sutphin Boulevard between 95<sup>th</sup> Avenue and Liberty Avenue is in significant need of streetscape improvements such as benches and street trees. The street and its storefronts are poorly maintained and do not present a welcoming corridor for those entering the transportation and commercial hub of the Station Area from the south. Substantial progress will be made by extending the Sutphin Boulevard Business Improvement District (BID) to include the properties on either side of Sutphin Boulevard from 94<sup>th</sup> Avenue to Liberty Avenue.

Extending the Sutphin Boulevard BID will require development of an **action plan**. This action plan will govern the **outreach process** to residents, property owners and merchants. It will also identify the actions necessary for the existing BID to undertake in order to extend its services to this area. Initial additional **operating capital** to extend the services will also be required.

### Area-wide Marketing Plan and Implementation featuring Sutphin Boulevard BID

A new **area-wide marketing plan** for the Station Area is necessary to fully leverage the redevelopment potential of this robust transportation hub and the new services that will be available to businesses that locate here through the extension of the Sutphin Boulevard BID. Once the marketing plan is completed, additional resources will be required to implement the plan. **Implementation** will require marketing materials, advertising the Station Area in relevant publications and hiring staff to coordinate various tasks.

### **Medium-term**

- Pursue alternative sources of financing through grant-writing and other application preparation, including tax-exempt and low-interest government subsidized loans, to carry out infrastructure improvements in the Station Area and redevelopment of the strategic sites
- Carry out due diligence activities such as title searches and property appraisals for the strategic sites
- Perform Phase 1 and subsequent Phase 2 ESAs for each parcel in the strategic sites
- Complete a land assemblage analysis and relocation feasibility analysis that includes a detailed examination/survey of property owners and current uses on the strategic sites

### **Long-term**

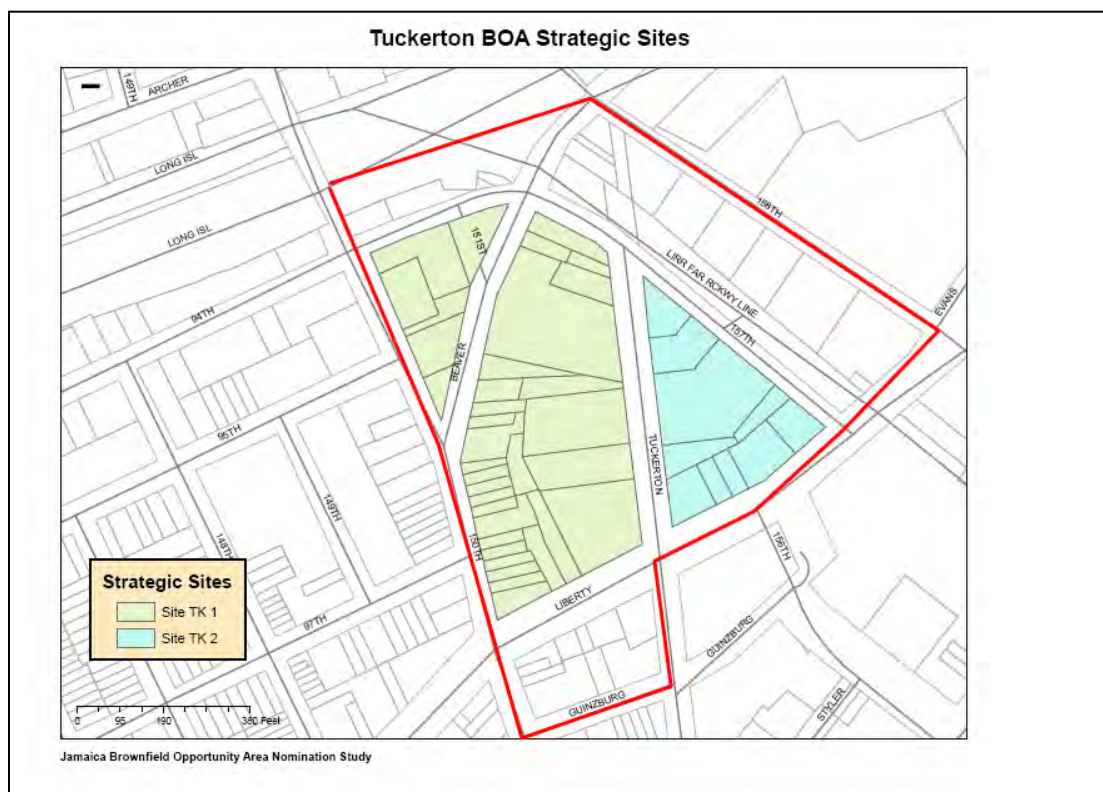
- Prepare new design and engineering specifications for realignment of the 150<sup>th</sup> Street/Archer Avenue bus access-way
- Perform a bicycle access and infrastructure study for the Station Area that incorporates PLANYC concepts and fully integrates any proposed improvements with bicycle amenities in adjacent neighborhoods
- Work to implement currently contemplated, and develop new, solutions to local storm water drainage problems

## Tuckerton BOA

### Action Overview

Tuckerton BOA consists of approximately five tax blocks in the northeast corner of the BOA Study Area. Tuckerton is the most heavily industrialized area in Downtown Jamaica and is adjacent to the US Food & Drug Administration laboratory and York College. These two functions, industrial and academic, are not compatible in their present form and conflicts are evident. The recent up-zone to M1-4 here and the uses in close proximity to Tuckerton give the Tuckerton BOA unique appeal from a market demand perspective.

There exists strong demand for more retail development in Downtown Jamaica. At the same time, however, there is an important base of employment in Tuckerton BOA that must be preserved. This base of employment is especially critical given that a significant portion is in manufacturing, a sector that is faring better than most in the current economic downturn. Therefore, redevelopment must proceed with an eye towards ensuring that whatever industrial uses remain are operated in a clean manner on properties that are well-maintained and that transition appropriately to the other uses surrounding Tuckerton.



### Short-term

#### Perform Site Assembly Study

The properties within the Tuckerton BOA are small and are owned by a large number of individuals whose redevelopment experience varies considerably. Assembling Tuckerton Strategic

Site 1 or Strategic Site 2 will be a complex task requiring involvement of multiple parties and City and State agencies. A **site assembly study** would outline a strategy for site assembly, which will include an analysis of the South Jamaica Urban Renewal Plan as a tool for facilitating assembly.

#### Outreach to Property Owners

The process of assembling Tuckerton Strategic Site 1 and Strategic Site 2 will require sustained **outreach to property owners** to educate them about the value of their property, the redevelopment tools that are available and the process by which redevelopment can be achieved. To ensure the effectiveness of this outreach, a large body of information must be assembled and presented to property owners, some with little or no development experience, on issues such as current valuations, market demand and the opportunities for increased valuations that can be achieved through assemblage and redevelopment programs. A **summary and analysis of redevelopment tools** must be prepared that outlines the limitations of the zoning, the value of the Brownfield Cleanup Program (BCP), laws concerning liability and economic incentives such as New Markets Tax Credits.

#### Phase II Environmental Site Assessments

There are several properties within Tuckerton Strategic Site 1 and Strategic Site 2 that require **Phase II Environmental Site Assessments** (ESA). These sites were identified as part of the BOA Nomination Study. Once the appropriate relationships with property owners are built, the funding secured and/or the properties acquired, the Phase II ESAs must be conducted to determine a more precise estimate of the site preparation costs.

#### De-map Beaver Road

A long and complex process that will involve coordination with City agencies, substantial legal work and owner outreach will be required to **de-map Beaver Road**. This road is rarely used for anything but local traffic and its presence acts as a significant barrier to assembling Tuckerton Strategic Site 1. De-mapping of the street will facilitate further site assemblage activities for the site.

#### Market Study of Parking-to-Redevelopment Concept

There exists significant demand for parking in Downtown Jamaica for both retail businesses and for manufacturing and commercial employers in the area. This demand presents an opportunity for interim use of parts of the Tuckerton BOA for parking as a redevelopment site is assembled. There is also potential for a partnership between state and city agencies such as Empire State Development Corporation and NYC Economic Development Corporation working with private developers with experience in operating parking facilities. GJDC would apply for Step 3 funding to conduct a **market study** that would examine the demand for such a parking facility in the Tuckerton BOA, to outline the steps for achieving such a public-private partnership, and to analyze the market timing and feasibility of transitioning the assemblage from parking to its highest and best use.

#### Architectural, Street and Sidewalk Design Schematics

In order to demonstrate to property owners and potential public and private investors the long-term development potential of Tuckerton BOA, tools such as design schematics will be necessary to provide a visual representation of the concept. There is a need for a design firm that would generate these **design schematics** based on the redevelopment contemplated for the site. These schematics would combine with the other information that will be brought together as part of a Step 3 BOA project to provide a robust base of information for the sites.

## **Medium-term**

- Create a marketing strategy, including print and web-based materials, around Tuckerton that highlights the ample transportation infrastructure in the area, the adjacent institutions, the history of the community and key demographic information to leverage additional financial and strategic support from public and private entities; present as a soft site opportunity to larger scale developers
- Obtain an estimate of the cost of conducting a Phase 2 cultural resources investigation of the properties that have been identified as potentially archaeologically sensitive.
- Develop marketing materials including renderings of the envisioned redevelopment in response to the input and guidance of individual developers and investors.
- Work with existing entities such as New York City Department of Small Business Services to develop an analysis of the characteristics of the workforce in Jamaica and use this information to target individual businesses and industries for relocation to Tuckerton

## **Long-term**

- Access public and private funding to acquire individual properties and to relocate businesses off the sites.
- Begin informal discussions with local developers to gauge interest in redevelopment of the most southern portion of the site.
- Identify sources of funding and apply to secure such funding for all pre-development activities, including remediation and asbestos removal.
- Conduct a design study and develop engineering specifications for enhancements to Liberty Avenue including replacing curbing and sidewalk areas that are in poor condition, consolidating or eliminating curb-cuts, providing improved vehicular lighting and including pedestrian-oriented architectural lighting, planting street trees and landscape buffering of parking and other service-oriented areas.
- Improve pedestrian safety along Liberty Avenue by redesigning the street and upgrading pedestrian signals at key intersections; enhance crossing striping to provide greater warning of pedestrian activity for motorists.



velopment analysis is needed for this site. Such an assessment would determine the level of market support for particular uses and the kinds of development that are possible given floor-area-ratio, historic preservation and other factors on the properties.

Market assessment of development prospects for Western Gateway Strategic Sites 2 and 3  
Infrastructure improvements that will soon take shape in the area of Western Gateway Strategic Sites 2 and 3 will change significantly the development potential of these properties. It is expected that uses that require both direct access to the regional highway system and the JFK Airport area will be most desired. A market-based assessment to improve the understanding and information available about the degree to which these infrastructure changes will enhance the value of adjacent properties and identify which uses will then be most in demand would be a useful tool to attract private funding for redevelopment.

#### BOA-wide Hospitality Industry Market and Feasibility Analysis

As access to properties within the Western Gateway BOA improves with the completion of the Atlantic Avenue Extension and the two-way pair, and ridership on AirTrain grows, new opportunities for hospitality-related uses will emerge. To market properties within the Western Gateway BOA for redevelopment, GJDC must be prepared with data specifically relevant for such uses to inform decisions of developers and investors.

#### Highest and Best Use Study

The properties within the Western Gateway BOA must be examined to determine their suitability for the uses identified in the market analyses that will be conducted. Redevelopment strategies for any sites assembled must be formulated around, or with the knowledge of, the use that will leverage the highest value of the property. GJDC will need this information both to tailor the redevelopment and to attract the necessary investment. Such a highest and best use study will identify these uses and also examine the cost of pre-development activities and the reuse potential of existing buildings within the Western Gateway BOA, such as the Long Island Railroad headquarters, for the uses identified.

#### Property Assemblage Analysis

The ability to assemble tax lots into appropriately sized redevelopment sites is one of the primary considerations in identifying which uses should be pursued on which properties. Deed restrictions, liens, environmental contamination and zoning are all factors that must be analyzed for these properties. A property assemblage analysis that will determine the appropriate assembly strategy based on these factors is recommended.

#### Pedestrian and Traffic Analysis

The completion of Station Plaza and the Atlantic Avenue extension and two-way pair will alter both vehicular and pedestrian traffic in the Western Gateway BOA. Transportation infrastructure in the area must be suitable to accommodate any changes. Gathering information on the flow of pedestrian and vehicular traffic will be necessary to ensure its suitability. This information will also be vital when developing site plans.

### **Medium-term**

- Develop and implement a marketing concept that will attract a strategic mix of service and retail businesses to the areas adjacent to Station Plaza
- Prepare conceptual and schematic designs for projects on the strategic sites



- Conduct Phase 1 ESAs for the individual parcels on the strategic sites and update those that already exist
- Examine existing site history documentation to estimate potential cleanup costs associated with the strategic sites, as well as eligibility for public funding of such cleanup
- Identify sources of public funding or economic development incentive programs to assist in expansion of existing buildings or complete redevelopment of the properties

### **Long-term**

- Perform site acquisition due diligence including title searches and property appraisals and acquire properties based upon findings of the analysis
- Complete a land assemblage analysis and relocation feasibility analysis that includes a detailed examination/survey of property owners and current uses on the sites, including lease status
- Develop Environmental Impact Assessment per the requirements of the State and City Environmental Quality Review Act, including impact studies as needed
- Assess the condition of the structures on the sites to determine suitability for reuse

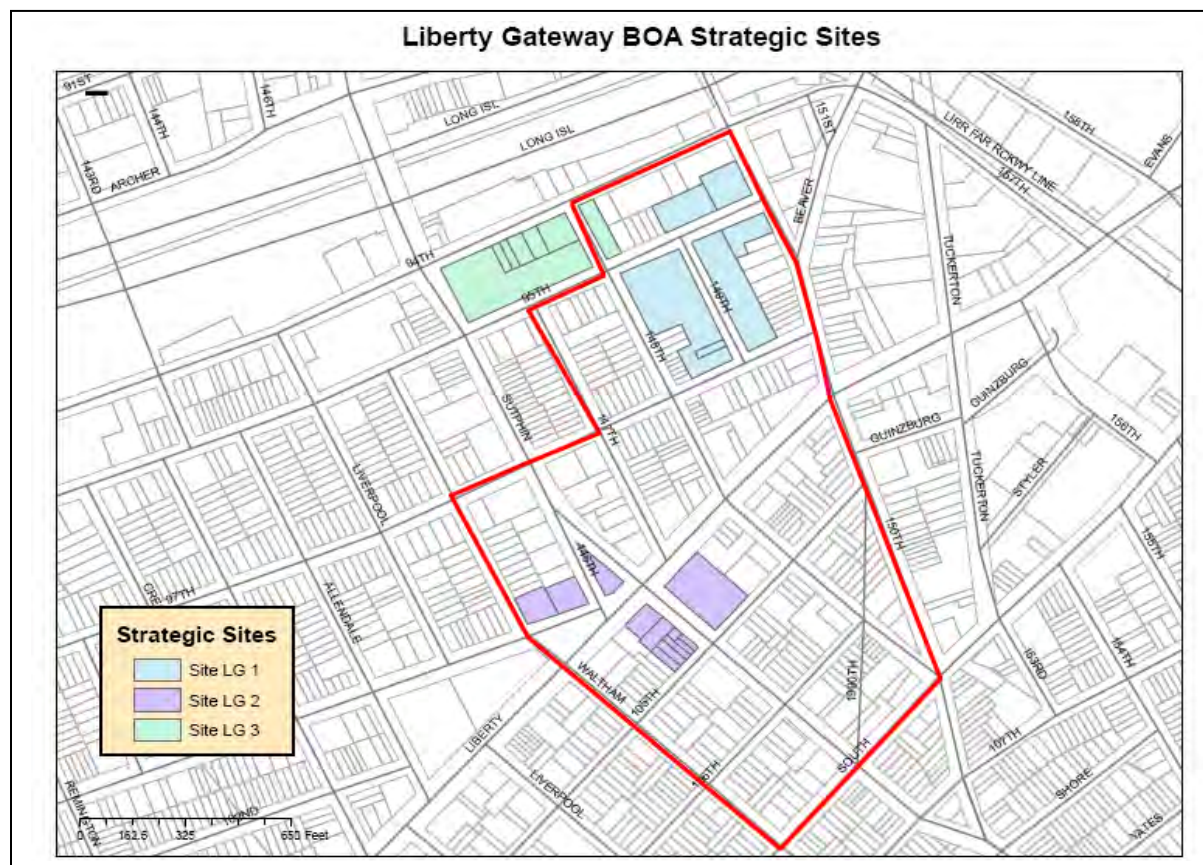
## Liberty Gateway BOA

### Action Overview

At this time no Priority Actions are proposed for the Liberty Gateway BOA. Redevelopment priorities in Downtown Jamaica have shifted mostly to the Station Area and, to a lesser degree, Tuckerton and the Western Gateway. Long-term redevelopment potential, however, remains strong in the Liberty Gateway BOA due to a variety of factors.

The location advantages afforded to properties along the corridors running through the Liberty Gateway BOA are the primary market/demand consideration. The close proximity to the transportation hub is also an important element to incorporate into future development along the corridors, particularly when contemplating attracting or retaining manufacturing or commercial employment in the northeast corner of the BOA. Neighborhood retail and lower-rise housing will attract the most demand in the southern portion of the Liberty Gateway BOA, while industrial and commercial uses, including larger-scale retail, would be supported further north.

The design character of the transportation infrastructure in the area is one of the most notable features in the Liberty Gateway BOA. There is substantial need for design improvements to enhance the pedestrian experience along the corridors and decrease the dominance of the automobile through the urban landscape. Unlike other portions of the BOA Study Area where transportation function presents immense challenges to design, the Liberty Gateway BOA's existing infrastructure can be easily modified to accommodate modern urban design concepts with the proper amount of investment.



## Appendix A – List of Identified Brownfields

A total of 223 properties within the Jamaica BOA Study Area were identified as brownfields during the course of the Study. Properties that displayed one or more of the following were identified as brownfields:

- assigned an “e” designation by the City of New York
- displayed signs of contamination based on field observations
- identified as brownfields in previous property surveys, including Phase 1 Environmental Site Assessments
- site of a DEC-registered spill
- use historically associated with contamination

Brownfields in Jamaica BOA Study Area		
<u>Block</u>	<u>Lot</u>	<u>Address</u>
9986	2	144-06 91 AVENUE
9986	75	144-15 ARCHER AVENUE
9989	17	NONE
9992	43	143-39 95 AVENUE
9994	38	90-79 147 PLACE
10000	24	94-12 150 STREET
10027	24	95-39 SUTPHIN BOULEVARD
10027	32	95-21 SUTPHIN BOULEVARD
10033	20	148-27 LIBERTY AVENUE
10055	16	104-16 SUTPHIN BOULEVARD
10055	17	105 AVENUE
10056	12	105-04 SUTPHIN BOULEVARD
10095	49	150-37 150 STREET
10095	51	94-21 150 STREET
10095	58	95-09 150 STREET
10095	71	94-15 150 STREET
10107	63	97-13 150 STREET
10107	66	97-07 150 STREET
10107	67	97-03 150 STREET
10107	68	97-01 150 STREET
10107	69	95-43 150 STREET
10107	70	95-41 150 STREET
10107	74	95-31 150 STREET
10107	75	150 STREET
10107	76	95-25 150 STREET
10107	79	150-04 BEAVER ROAD
10107	81	BEAVER ROAD
10107	90	150-24 BEAVER ROAD
10107	99	151-16 BEAVER ROAD
10107	101	151-24 BEAVER ROAD
10107	106	95-08 TUCKERTON STREET

10107	132	95-50 TUCKERTON STREET
10107	155	150-19 LIBERTY AVENUE
10107	157	150-17 LIBERTY AVENUE
10110	60	150-11 GUINZBURG ROAD
9982	12	91-12 143 STREET
9982	13	91-16 143 STREET
9982	17	91-26 ARCHER AVENUE
9982	27	91-15 139 STREET
9984	11	91-12 144 PLACE
9984	17	143-11 ARCHER AVENUE
9986	3	144-08 91 AVENUE
9986	20	91-15 144 PLACE
9986	61	91-10 146 STREET
9987	1	146-01 91 AVENUE
9991	1	138-54 94 AVENUE
9991	19	138-68 94 AVENUE
9991	68	139-11 95 AVENUE
9992	26	143-02 94 AVENUE
9992	27	143-06 94 AVENUE
9992	29	143-08 94 AVENUE
9992	38	143-24 94 AVENUE
9993	1	144-02 94 AVENUE
9993	3	144-06 94 AVENUE
9993	18	94-02 SUTPHIN BOULEVARD
9993	20	94-06 SUTPHIN BOULEVARD
9993	22	94-12 SUTPHIN BOULEVARD
9993	23	94-14 SUTPHIN BOULEVARD
9993	24	94-16 SUTPHIN BOULEVARD
9993	25	94-18 SUTPHIN BOULEVARD
9993	27	94-20 SUTPHIN BOULEVARD
9993	28	145-09 95 AVENUE
9993	29	145-07 95 AVENUE
9995	1	147-28 JAMAICA AVENUE
9995	7	92-11 147 PLACE
9995	14	147-27 ARCHER AVENUE
9995	18	ARCHER AVENUE
9998	1	94 AVENUE
9998	2	148-23 94 AVENUE
9998	16	94 AVENUE
9998	19	147-43 94 AVENUE
9998	22	94 AVENUE
9998	25	147-07 94 AVENUE
9998	42	147-05 94 AVENUE
9998	43	93-43 SUTPHIN BOULEVARD
9998	47	93-45 SUTPHIN BOULEVARD
9998	83	93-01 SUTPHIN BOULEVARD
9998	86	147-12 ARCHER AVENUE
9998	87	147-14 ARCHER AVENUE
9998	88	147-16 ARCHER AVENUE
9998	89	147-18 ARCHER AVENUE

9998	90	147-20 ARCHER AVENUE
9998	91	147-22 ARCHER AVENUE
9998	93	147-26 ARCHER AVENUE
9998	94	ARCHER AVENUE
9998	95	147-30 ARCHER AVENUE
9998	101	148-02 ARCHER AVENUE
9998	109	148-12 ARCHER AVENUE
9998	110	148-22 ARCHER AVENUE
9998	119	149-10 ARCHER AVENUE
9998	124	93-02 150 STREET
9998	127	93-08 150 STREET
10000	1	147-16 94 AVENUE
10000	5	148-12 95 AVENUE
10000	31	149-01 95 AVENUE
10000	38	95 AVENUE
10000	39	95 AVENUE
10000	42	148-07 95 AVENUE
10001	1	95-04 149 STREET
10001	19	95-34 149 STREET
10001	24	95-41 148 STREET
10001	25	95-37 148 STREET
10001	26	95-35 148 STREET
10001	27	95-29 148 STREET
10001	28	95-27 148 STREET
10001	29	95-25 148 STREET
10001	40	95-33 148 STREET
10001	41	95-31 148 STREET
10001	124	95-39 148 STREET
10002	1	95-25 149 STREET
10002	5	95-02 150 STREET
10002	10	95-08 150 STREET
10002	13	95-12 150 STREET
10002	15	95-20 150 STREET
10002	17	95-24 150 STREET
10002	20	95-28 150 STREET
10002	21	95-30 150 STREET
10002	22	95-32 150 STREET
10002	23	95-36 150 STREET
10002	24	95-38 150 STREET
10002	25	95-40 150 STREET
10002	122	95-34 150 STREET
10026	1	95 AVENUE
10026	6	95-02 SUTPHIN BOULEVARD
10026	12	95-14 SUTPHIN BOULEVARD
10026	14	95-26 SUTPHIN BOULEVARD
10026	23	95-38 SUTPHIN BOULEVARD
10026	39	95-15 WALTHAM STREET
10027	3	95 AVENUE
10027	5	147-12 95 AVENUE
10027	8	147-18 95 AVENUE

10027	10	95-08 147 PLACE
10027	11	95-10 147 PLACE
10027	36	95-07 SUTPHIN BOULEVARD
10028	1	95-11 147 PLACE
10028	2	147-30 95 AVENUE
10028	4	147-36 95 AVENUE
10028	7	147-40 95 AVENUE
10028	10	147-44 95 AVENUE
10028	11	95-11 148 STREET
10028	31	95-25 147 PLACE
10028	32	95-23 147 PLACE
10028	34	95-19 147 PLACE
10030	6	97-04 SUTPHIN BOULEVARD
10030	12	97-16 SUTPHIN BOULEVARD
10030	15	97-20 SUTPHIN BOULEVARD
10030	17	97-26 SUTPHIN BOULEVARD
10030	22	97-34 SUTPHIN BOULEVARD
10030	25	101 AVENUE
10030	28	97-35 WALTHAM STREET
10031	2	147-20 97 AVENUE
10031	7	147-16 97 AVENUE
10031	10	97-11 SUTPHIN BOULEVARD
10031	12	97-15 SUTPHIN BOULEVARD
10031	17	97-31 147 PLACE
10031	25	97-50 LIBERTY AVENUE
10032	13	97-18 148 STREET
10032	15	148 STREET
10032	16	148 STREET
10032	17	147-27 LIBERTY AVENUE
10032	18	147-25 LIBERTY AVENUE
10032	22	147-17 LIBERTY AVENUE
10033	8	148-16 97 AVENUE
10033	13	149-04 97 AVENUE
10033	14	149-06 97 AVENUE
10055	2	146-46 LIBERTY AVENUE
10055	7	LIBERTY AVENUE
10055	11	146-64 LIBERTY AVENUE
10055	14	SUTPHIN BOULEVARD
10055	31	104-11 WALTHAM STREET
10056	17	105-20 106 AVENUE
10056	19	WALTHAM STREET
10057	14	106-12 SUTPHIN BOULEVARD
10057	16	106-20 SUTPHIN BOULEVARD
10058	1	147-02 LIBERTY AVENUE
10058	21	147-19 105 AVENUE
10059	11	105 AVENUE
10059	12	147-30 105 AVENUE
10059	15	105-24 148 STREET
10059	16	147-31 106 AVENUE
10059	23	106 AVENUE



10059	24	147-17 106 AVENUE
10059	25	147-11 106 AVENUE
10059	28	147-05 106 AVENUE
10059	30	105-17 SUTPHIN BOULEVARD
10059	31	105-15 SUTPHIN BOULEVARD
10059	32	105-11A SUTPHIN BOULEVARD
10059	131	105-13 SUTPHIN BOULEVARD
10059	132	105-11B SUTPHIN BOULEVARD
10060	2	106-03 SUTPHIN BOULEVARD
10060	6	147-12 106 AVENUE
10060	16	106-16 148 STREET
10060	30	106-15 SUTPHIN BOULEVARD
10061	32	104-18 150 STREET
10061	33	150 STREET
10061	34	150 STREET
10061	35	105 AVENUE
10061	36	105 AVENUE
10062	6	105-25 148 STREET
10062	22	150 STREET
10062	23	150 STREET
10095	32	150-05 94 AVENUE
10095	43	94-01 150 STREET
10107	71	95-35 150 STREET
10107	73	95-33 150 STREET
10107	77	150 STREET
10107	82	150-10 BEAVER ROAD
10107	84	150-14 BEAVER ROAD
10107	86	150-20 BEAVER ROAD
10107	107	TUCKERTON STREET
10107	130	TUCKERTON STREET
10107	138	TUCKERTON STREET
10107	142	150-35 LIBERTY AVENUE
10107	167	150 STREET
10108	301	155-19 LIBERTY AVENUE
10108	305	LIBERTY AVENUE
10108	312	LIBERTY AVENUE
10108	314	155-11 LIBERTY AVENUE
10108	316	LIBERTY AVENUE
10108	319	TUCKERTON STREET
10108	348	TUCKERTON STREET
10109	31	LIBERTY AVENUE
10109	44	LIBERTY AVENUE

## Appendix B – Updated Market Demand Study (2009)

### Memorandum

To	Greater Jamaica Development Corporation	Page	1
CC			
Subject	Real Estate Trends Update (No. 18464)		
From	AECOM Economics		
Date	January 8, 2010		

The Greater Jamaica Development Corporation (GJDC) retained AECOM to provide socio-economic and market research in connection with the Jamaica Brownfield Opportunity Area (BOA) Nomination Study. This memorandum provides an overview of socio-economic and market trends, highlighting major shifts that have occurred since the completion of the Jamaica BOA Market Study (2007). Similar to the earlier BOA Market Study, this memorandum focuses on residential, retail, office, and industrial/flex uses, providing detailed market statistics concerning vacancy, rents, new construction, leasing activity, and other factors.

## Key Findings

Demographic and economic forecasts indicate moderate growth for Jamaica and Queens going forward. While the residential real estate market in Queens has been negatively impacted by the current economic recession, there are signs of market stabilization. Compared to residential markets, commercial real estate markets in Queens have exhibited more resiliency to adverse macroeconomic conditions. In downtown Jamaica specifically, real estate markets have exhibited more significant strain.<sup>17</sup> AECOM's trends analysis reveals the following shifts in real estate markets encompassing the Jamaica BOA:

- The residential market in Queens has experienced a steep decline in sales, increase in foreclosures, and depreciation in pricing. However, recent residential sales data indicate that while prices continue to fall, sales volumes are stabilizing. Similar to the overall housing market, the condominium and co-op markets have exhibited steep sales volume declines. However, condominium and co-op pricing has not been as severely impacted as in the residential market overall.
- The retail market in Queens remained stable during 2007 and 2008. In 2009, there were moderate increases in vacancy rates, declining lease rates, and negative net absorption. In downtown Jamaica, vacancies increased and lease rates fell substantially during 2009.
- The office market in Queens has shown stability, with declining vacancy rates and positive net absorption. However, lease rates have fallen and recent construction activity has been limited. In downtown Jamaica, the office market has exhibited increasing vacancy rates and negative net absorption, despite significant reductions in lease rates.
- The industrial/flex market in Queens has exhibited stability, with declining vacancy rates and positive net absorption. Lease rates have declined moderately and there has been very little new construction in the market. In downtown Jamaica, vacancy rates have increased and there has been negative net absorption, even with reductions in lease rates.

Overall, commercial vacancy rates have remained relatively low, indicating that Queens is positioned for an economic recovery. While market activity has been limited and near-term growth prospects are moderate, there are opportunities for future development. In downtown Jamaica, despite relatively severe recessionary effects, the area's competitive advantages position it for growth. Accordingly, recommendations made in the 2007 Jamaica BOA Market Study remain generally valid, though the time horizon for redevelopment in Jamaica is likely to be considerably longer than previously anticipated. To counteract recent economic trends, the GJDC must continue to facilitate real estate projects and actively market opportunities for redevelopment in Jamaica.

## Demographic and Economic Trends

The rate of population growth in Community District 412 (Jamaica/Hollis) in Queens (CD 412)<sup>18</sup> was similar to Queens overall between 1990 and 2009. Population within both geographies grew by about

<sup>17</sup> Downtown Jamaica is defined here as the area identified by the NYC Rezoning and Redevelopment Plan for Downtown Jamaica (September 2007).

<sup>18</sup> AECOM uses 2009 demographic data from ESRI. To collect data for CD 412, AECOM uses a collection of 173 Census block groups that extend slightly beyond the CD 412 boundaries.

one percent annually from 1990 to 2000 and 0.3 percent annually from 2000 to 2009. Similarly, average household income grew nearly three percent annually in CD 412 and Queens from 1990 to 2009. Forecasts indicate moderate population, household, and average household income growth in CD 412 and Queens going forward.

The unemployment rate in Queens has paralleled the unemployment rate in New York City, but has consistently been lower by about 0.7 percentage points. Unemployment peaked in 1993 at 11 percent in Queens and 12 percent in New York City. After reaching low points from 2006 through 2008, unemployment grew to nine percent in Queens and ten percent in New York City in 2009.

The level of employment in Queens grew at an average rate of 0.4 percent annually from 1990 to 2009. Forecasts indicate one percent annual employment growth through 2014, with significant gains in education/health services, leisure/hospitality, government, wholesale trade, and construction jobs.

## **Residential**

The residential market in the Jamaica area has experienced steep declines since 2007. Greatly reduced sales volumes and pricing have been accompanied by increases in foreclosures and vacancy. However, transaction data from the third quarter of 2009 indicate market stabilization, including steadying sales activity and decreased foreclosure notices.

### **Housing Stock**

The number of housing units in CD 412 grew at a similar rate to Queens overall between 2000 and 2009, about 0.3 percent annually, adding 3,220 housing units and 22,976 over that time period, respectively. In recent years, CD 412 has attracted an increasing share of residential development in Queens. In 2000, the NYC Department of Buildings issued permit for 218 units in CD 412, or seven percent of the total permitted units in Queens overall. By 2007, the number of units permitted had grown to 910, 18 percent of the total permitted units in Queens. According to HUD data, residential permitting in Queens remained strong in 2008 but fell precipitously in 2009.

### **Occupancy**

The share of housing units occupied by owners has remained unchanged in Jamaica and Queens since 2000. In 2009, owner-occupied units represented about 47 percent and 41 percent of all units in CD 412 and Queens, respectively. The percentage of housing units considered vacant grew from 6.5 percent to 8.3 percent in CD 412 and from 4.2 to 5.8 percent in Queens.

### **Rental Residential Market**

*New multifamily residential developments in Jamaica have been limited to Yorkside Towers, built in 2005, and the Moda, expected to be delivered in 2010. Both properties are mixed-use, with ground-floor retail and housing above. Yorkside Towers includes 179 middle-income units, developed under the New Housing Opportunities Program (New HOP). These units are reserved for households earning up to 175 percent of the Area Median Income (AMI). The Moda project will include 346 units, including market-rate, middle-income (New HOP), low-income, and very low-income apartments.*

*Yorkside Towers, located on 161st Street north of Jamaica Avenue, was the first multifamily project built in downtown Jamaica in over 30 years. The project, developed by The Ciampa Organization consists of two buildings connected by a private courtyard in the back. The New HOP unit rents range from \$1,060 per month for studios to \$1,650 per month for two-bedroom apartments. These lease rates reflect a slight increase from rates observed in 2007, when lease rates ranged from \$1,000 for studios and \$1,600 for two-bedroom apartments.*

The Dermot Company is completing the Moda project at the site of the former Queens Family Courthouse at 89<sup>th</sup> Avenue and Parsons Boulevard. The project includes 110 New HOP apartments with rents ranging from \$1,338 for studios to \$2,019 for two-bedroom apartments.

***For-Sale Residential Market***

The sharp residential market decline can be attributed in part to the foreclosure crisis in the Jamaica area. CD 412 exhibited the fifth highest foreclosure rate in New York City in 2007, with 52 foreclosures per 1,000 (in 1- to 4-family properties). This foreclosure rate was significantly lower in Queens overall, where there were 21 foreclosures per 1,000. However, it appears that the crisis has subsided, as evidenced by decreasing foreclosure rates in 2009 compared to 2008.<sup>19</sup>

Median sales prices have consistently declined in both South Queens and Queens overall through 2008 and 2009. There were 12 percent and 11 percent declines in South Queens and Queens, respectively, from the third quarter of 2007 to the third quarter of 2008. Similarly, price declines were about 12 percent and 10 percent in South Queens and Queens, respectively, from the third quarter 2008 through the third quarter of 2009.

The condominium and co-op market exhibited greater price stability than the overall housing market in Queens between 2008 and 2009. The median condominium and co-op sales price climbed moderately from the third quarter of 2007 to the third quarter of 2008, by four percent and three percent respectively. By the third quarter of 2009, however, the median sales price for condominiums and co-ops had declined 14 percent and eight percent, respectively, from the same period one year ago.

The bright spot in the market is that residential sales volumes have begun to stabilize. There were 655 residential sales in South Queens during the third quarter of 2009, only a three percent decline from the same period one year ago. Total sales in South Queens had previously fallen from 1,080 to 675 between the third quarter of 2007 and the third quarter of 2008, a dramatic decrease of 38 percent.

Condominium sales volumes have begun to stabilize while co-op sales volumes continue to drop in Queens. Specifically, Condominium and co-op sales volumes declined 42 percent and 23 percent, respectively, from the third quarter of 2007 to the third quarter of 2008. This decline tapered off for the condominium market, which exhibited a relatively moderate 12 percent drop between the third quarter of 2009 and the same period one year ago. However, co-op sales declined by 24 percent over the same period.

**Retail**

The retail market in Queens proved resilient during 2007 and 2008 but has shown signs of strain in 2009, with rising vacancy rates, declining average lease rates, and negative net absorption. Though market fundamentals have weakened somewhat, the limited delivery of new retail space has buoyed market performance and improved future prospects in Queens. In general, market indicators reveal a relatively healthy retail market, though there are recent signs of market deterioration.

Throughout the outer boroughs (excluding Staten Island) the retail real estate market performed well from 2007 through the first half of 2009. After six straight quarters of vacancy rate declines, vacancy increased to 5.4 percent in the third quarter. In Queens, the retail market followed a similar pattern, with vacancy rates moving slightly higher in the second quarter of 2009 due to negative net absorption. Average retail lease rates in the outer boroughs (excluding Staten Island) and Queens grew through 2008 but declined slightly in 2009. In downtown Jamaica, vacancy rates moved to 9.7 percent in the second quarter of 2009 from the 4.6 to 5.5 percent range observed between 2007 and early 2009. The average lease rates in downtown Jamaica declined from about \$70 to \$43 per square foot by the third quarter of 2009.

With mixed market performance, there has been very limited new retail development in Queens and downtown Jamaica during 2008 and 2009. With only 183,000 square feet delivered in 2008 and 81,000 square feet delivered through the third quarter of 2009, the Queens market has weathered the economic downturn without a generating a significant oversupply of space. Overall, vacancy and lease rates remain healthy in Queens, despite challenging retail conditions.

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<sup>19</sup> Home groan in Queens: Borough leads city rise in foreclosure crisis. *New York Daily News*. April 22, 2009.

## **Office**

The office market has performed relatively well through the recession. Vacancy rates in the outer boroughs (excluding Staten Island) and in Queens remained stable during 2007 and 2008 and have declined slightly in 2009. Overall, net absorption of office space was positive from 2007 to 2009. Since the delivery of some large office developments in 2007, new construction has been limited. While the indicators suggest a relatively healthy office market, recent declines in lease rates and low levels of leasing activity highlight the fragility of the market.

The class A and B office market in the outer boroughs (excluding Staten Island) exhibited vacancy rates ranging between 8.7 and 9.2 percent during 2007 and 2008. The vacancy rate declined to 8.3 percent in the third quarter of 2009. In Queens, vacancy rates have been healthier, ranging between 5.4 and 5.9 percent in 2007 and 2008. The vacancy rate declined to 4.8 percent in the first quarter of 2009 and stood at 5.0 percent in the third quarter. Decreasing vacancy has been driven by net positive absorption of office space. Average lease rates in the outer boroughs (except Staten Island) and Queens trended upward through 2008, but have declined slightly in 2009. In downtown Jamaica, negative absorption caused the vacancy rate to increase from 8.8 percent in 2008 to its current 11.7 percent. Lease rates have declined to \$20 per square foot, from the \$24 to \$25 range observed during 2007 and 2008. Fortunately, the lack of new office construction in downtown Jamaica has prevented a severe oversupply of space from developing, thereby preventing greater losses of value.

## **Industrial/Flex**

The industrial/flex market has exhibited stability in terms of vacancy rates, net absorption, and new deliveries in the outer boroughs. With stable market performance and limited new development, the economic downturn appears to have had a relatively limited impact on industrial/flex market conditions, though lease rates have fallen in the face of reduced demand.

Vacancy rates in the outer boroughs (excluding Staten Island) and in Queens have declined since 2007. In the outer boroughs, vacancy rates ranged between 3.9 and 4.1 percent from 2007 through 2009. After dropping to a 3.4 percent in the third quarter of 2006, the vacancy rate in Queens grew to 4.7 percent in 2008 but has recently declined to 4.2 percent. Decreasing vacancy has been driven by positive net absorption of space. Average lease rates have grown steadily in the outer boroughs (except Staten Island) since 2007. In Queens, lease rates peaked in 2007 but have since declined by about 30 percent. In downtown Jamaica, vacancy rates climbed from 2007 into 2009 but have fallen in recent months.

There has only been 7,500 square feet added to the industrial/flex market in the outer boroughs (excluding Staten Island) in 2009. The downtown Jamaica industrial/flex market has exhibited declining lease rates, negative net absorption, and increased vacancy rates since 2007. There were no industrial space deliveries from 2007 to date in downtown Jamaica. The limited supply of additional space has helped keep the industrial/flex market relatively healthy, even in light of economic challenges.

## **Conclusions**

With the exception of the residential sector, real estate markets in Queens and other outer boroughs have remained relatively resilient, the result of a diverse market (including industrial, office, and retail), a healthy balance of supply and demand, moderate levels of new construction during the real estate boom, planning efforts, and aggressive marketing. Relatively stable vacancy rates in the office, retail, and industrial/flex sectors indicate the strength of these markets. While the downtown Jamaica markets have exhibited more significant recessionary impacts in recent months, this area's competitive positioning is expected to attract growth as the New York City economy rebounds.

## Appendix A: Demographic and Economic Trends

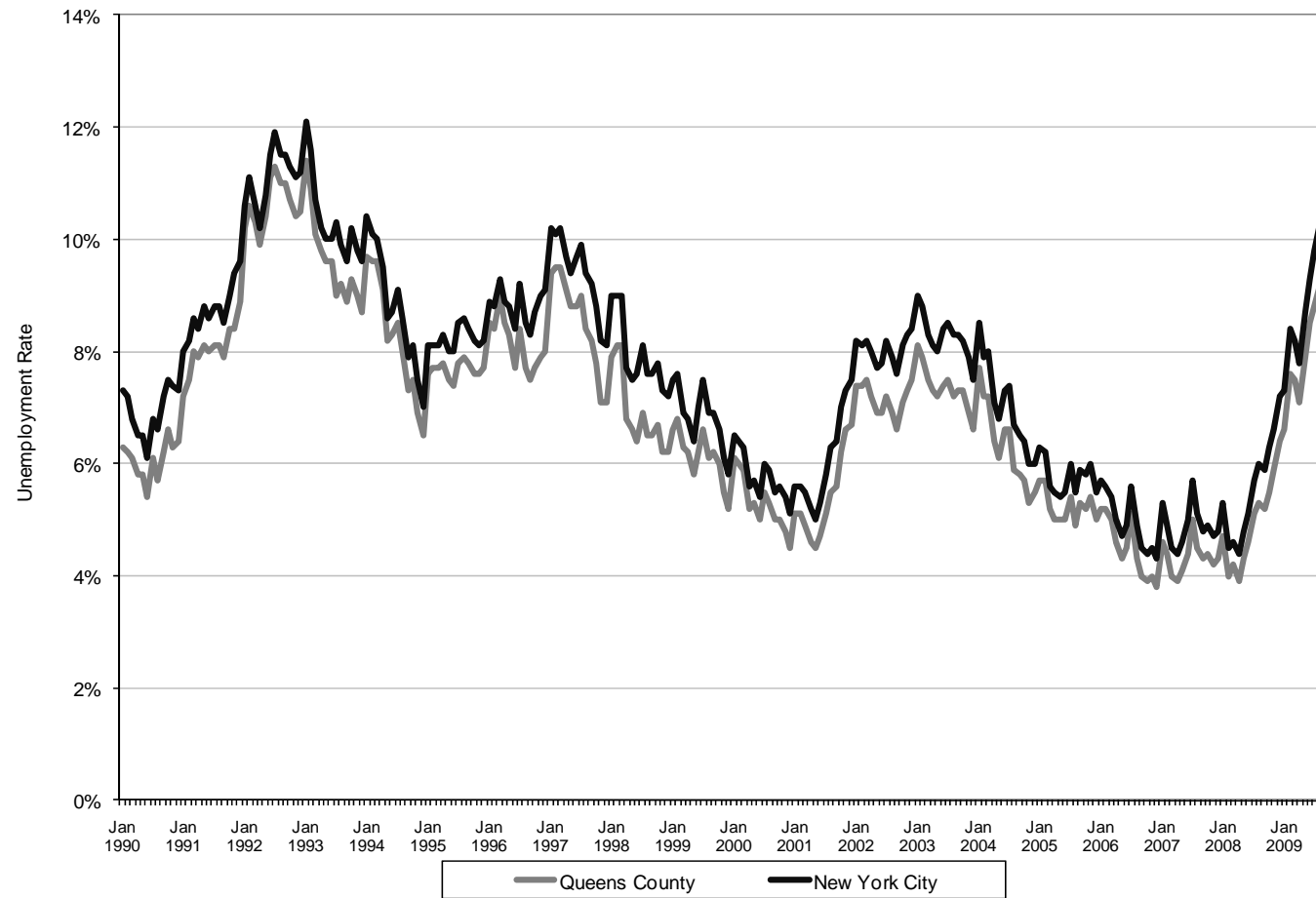
**Figure 1: Demographic Trends and Projections**

					Annualized Growth		
	1990	2000	2009	2014	1990-2000	2000-2009	2009-2014
CD 12							
Population	203,642	227,635	233,478	237,141	1.1%	0.3%	0.3%
Households	62,795	71,515	73,118	73,955	1.3%	0.2%	0.2%
Average Household Income	\$38,874	\$50,478	\$64,458	\$67,834	2.6%	2.8%	1.0%
Queens							
Population	1,951,598	2,229,379	2,285,503	2,315,229	1.3%	0.3%	0.3%
Households	720,149	782,664	791,513	797,530	0.8%	0.1%	0.2%
Average Household Income	\$41,193	\$54,128	\$69,903	\$73,599	2.8%	2.9%	1.0%
New York City							
Population	7,322,564	8,008,278	8,342,726	8,502,331	0.9%	0.5%	0.4%
Households	2,819,401	3,021,588	3,118,110	3,172,730	0.7%	0.3%	0.3%
Average Household Income	\$41,734	\$58,501	\$74,924	\$79,975	3.4%	2.8%	1.3%

Source: ESRI; US Census Bureau; AECOM



**Figure 2: Unemployment Trends**



**Source: Bureau of Labor Statistics; AECOM**

**Figure 3: Employment Trends, Queens**

Industry	1990	2000	2009	2014	Growth 2009 - 2014	Annualized Growth	
						1990 - 2009	2009 - 2014
Natural Resources & Mining	19	15	23	23	0	1.0%	0.1%
Construction	36,417	41,069	44,590	46,332	1,742	1.1%	0.8%
Manufacturing	61,439	47,580	25,307	24,014	(1,293)	-4.6%	-1.0%
Wholesale Trade	28,407	25,390	23,563	24,821	1,258	-1.0%	1.0%
Retail Trade	50,722	52,191	53,839	52,902	(937)	0.3%	-0.4%
Transportation, Warehousing, & Utilities	71,623	65,818	52,874	49,998	(2,876)	-1.6%	-1.1%
Information	7,767	10,398	9,389	9,119	(269)	1.0%	-0.6%
Financial Activities	27,366	28,177	31,207	28,741	(2,465)	0.7%	-1.6%
Professional & Business Services	29,106	36,791	38,460	40,442	1,982	1.5%	1.0%
Education & Health Services	76,904	101,750	130,072	148,950	18,879	2.8%	2.7%
Leisure & Hospitality	30,601	31,869	38,002	42,927	4,924	1.1%	2.5%
Other Services (except Public Administration)	19,571	23,961	25,388	28,966	3,578	1.4%	2.7%
Government	34,547	32,375	37,981	41,356	3,375	0.5%	1.7%
<b>Total</b>	<b>474,490</b>	<b>497,384</b>	<b>510,694</b>	<b>538,592</b>	<b>27,898</b>	<b>0.4%</b>	<b>1.1%</b>

Source: Economy.com; National Association of Realtors; AECOM

## Appendix B: Residential Trends

**Figure 4: Housing Stock**

Location	2000				2009			
	Housing Units	Owner-	Rental Units	Vacant Units	Housing Units	Owner-	Rental Units	Vacant Units
		Occupied Units				Occupied Units		
CD 12	76,492	47.4%	46.1%	6.5%	79,712	47.0%	44.8%	8.3%
Queens County	817,250	41.0%	54.8%	4.2%	840,126	41.0%	53.2%	5.8%
New York City	3,200,912	28.5%	65.9%	5.6%	3,366,530	29.2%	63.4%	7.4%

Source: ESR; US Census Bureau; AECOM

**Figure 5: Residential Sales and Price Trends**

	3Q08	4Q08	1Q09	2Q09	3Q09
<b>South Queens<sup>1</sup></b>					
Sales	675	596	462	554	655
Year over Year Change	-38%	-36%	-45%	-36%	-3%
Median Sales Price	\$396,550	\$386,900	\$374,500	\$360,000	\$350,000
Year over Year Change	-12%	-14%	-13%	-12%	-12%
<b>Queens</b>					
Sales	3,240	2,737	1,801	2,129	2,789
Year over Year Change	-35%	-39%	-52%	-45%	-14%
Median Sales Price	\$400,000	\$400,001	\$393,000	\$362,000	\$362,000
Year over Year Change	-11%	-7%	-5%	-14%	-10%
<b>Condominium (Queens)</b>					
Sales	311	253	188	201	275
Year over Year Change	-42%	-60%	-64%	-47%	-12%
Median Sales Price	\$415,000	\$380,000	\$454,860	\$386,437	\$354,900
Year over Year Change	4%	-3%	28%	-1%	-14%
<b>Co-op (Queens)</b>					
Sales	1,107	937	476	615	841
Year over Year Change	-23%	-28%	-56%	-46%	-24%
Median Sales Price	\$215,000	\$210,000	\$203,854	\$203,809	\$196,971
Year over Year Change	3%	1%	-1%	-2%	-8%

Source: Miller Samuel; AECOM

<sup>1</sup> South Queens includes the airport, Cambria Heights, Hollis, Jamaica, Jamaica Bay, Laurelton, Ozone Park, Richmond Hill, Rosedale, South Jamaica Bay, South Jamaica, South Ozone Park, Springfield Gardens, St. Albans, and Woodhaven.

## Appendix C: Retail Trends

**Figure 6: Retail Market Snapshot, 2009 Q3**

Market/ Submarket	Existing Square Feet	Vacancy (Square Feet)	Vacancy Rate
Queens	28,416,174	1,243,927	4.4%
QBB	74,857,519	4,013,117	5.4%

Source: CoStar Group; AECOM

<sup>1</sup> Includes only properties greater than 12,000 square feet.

**Figure 7: Retail Trends (Queens, Brooklyn, and Bronx)**

	2007 1Q	2007 2Q	2007 3Q	2007 4Q	2008 1Q	2008 2Q	2008 3Q	2008 4Q	2009 1Q	2009 2Q	2009 3Q
<b>Inventory</b>											
Buildings	1,808	1,812	1,820	1,824	1,831	1,834	1,842	1,844	1,847	1,849	1,855
Square Feet	71,955,671	72,054,352	72,462,504	72,837,468	73,265,968	73,646,180	74,056,164	74,110,164	74,150,964	74,177,464	74,857,519
Change in Inventory	187,044	98,681	408,152	374,964	428,500	380,212	409,984	54,000	40,800	26,500	680,055
<b>Vacancy</b>											
Square Feet	4,691,704	4,349,451	4,069,227	4,021,226	4,096,038	3,933,472	3,874,055	3,427,020	3,586,760	3,591,727	4,013,117
Vacancy Rate	6.5%	6.0%	5.6%	5.5%	5.6%	5.3%	5.2%	4.6%	4.8%	4.8%	5.4%
<b>Net Absorption</b>	(134,541)	440,934	688,376	431,605	353,688	542,778	469,401	501,035	(118,940)	21,533	258,665
<b>Average Lease Rate</b>	\$30.68/nnn	\$38.03/nnn	\$36.80/nnn	\$37.84/nnn	\$35.86/nnn	\$37.54/nnn	\$39.42/nnn	\$39.17/nnn	\$39.69/nnn	\$36.62/nnn	\$33.90/nnn

Source: CoStar Group; AECOM

<sup>1</sup> Includes only properties greater than 12,000 square feet.

**Figure 8: Retail Trends (Queens)**

	2007 1Q	2007 2Q	2007 3Q	2007 4Q	2008 1Q	2008 2Q	2008 3Q	2008 4Q	2009 1Q	2009 2Q	2009 3Q
<b>Inventory</b>											
Buildings	687	691	692	692	694	695	698	699	702	702	703
Square Feet	28,037,884	28,136,565	28,151,565	28,151,565	28,206,565	28,228,777	28,305,374	28,335,374	28,376,174	28,376,174	28,416,174
Change in Inventory	118,633	98,681	15,000	-	55,000	22,212	76,597	30,000	40,800	-	40,000
<b>Vacancy</b>											
Square Feet	1,761,049	1,612,136	1,324,607	1,267,961	1,361,023	1,222,519	1,235,285	1,153,714	1,196,149	1,341,913	1,243,927
Vacancy Rate	6.3%	5.7%	4.7%	4.5%	4.8%	4.3%	4.4%	4.1%	4.2%	4.7%	4.4%
<b>Net Absorption</b>	(37,422)	247,594	302,529	56,646	(38,062)	160,716	63,831	111,571	(1,635)	(145,764)	137,986
<b>Average Lease Rate</b>	\$26.84/nnn	\$27.21/nnn	\$27.65/nnn	\$32.69/nnn	\$29.96/nnn	\$33.82/nnn	\$37.36/nnn	\$37.62/nnn	\$37.23/nnn	\$34.23/nnn	\$32.91/nnn

Source: CoStar Group; AECOM

<sup>1</sup> Includes only properties greater than 12,000 square feet.

**Figure 9: Retail Trends (Downtown Jamaica)**

	2007 1Q	2007 2Q	2007 3Q	2007 4Q	2008 1Q	2008 2Q	2008 3Q	2008 4Q	2009 1Q	2009 2Q	2009 3Q
<b>Inventory</b>											
Buildings	60	60	60	60	60	60	60	60	60	60	60
Square Feet	2,634,534	2,634,534	2,634,534	2,634,534	2,634,534	2,634,534	2,634,534	2,634,534	2,634,534	2,634,534	2,634,534
Change in Inventory	59,408	-	-	-	-	-	-	-	-	-	-
<b>Vacancy</b>											
Square Feet	199,837	200,137	139,447	144,410	124,876	130,276	137,101	129,538	122,438	252,510	205,144
Vacancy Rate	7.6%	7.6%	5.3%	5.5%	4.7%	4.9%	5.2%	4.9%	4.6%	9.6%	7.8%
<b>Net Absorption</b>	77,036	(300)	60,690	(4,963)	19,534	(5,400)	(6,825)	7,563	7,100	(130,072)	47,366
<b>Average Lease Rate</b>	-	-	-	\$73.73/nnn	\$75.56/nnn	\$75.56/nnn	\$79.10/nnn	\$90.27/nnn	\$70.38/nnn	\$43.24/nnn	\$43.24/nnn

Source: CoStar Group; AECOM

<sup>1</sup> Includes only properties greater than 12,000 square feet.

## Appendix D: Office Trends

**Figure 10: Office Market Snapshot, 2009 Q3**

Market/ Submarket	Existing Square Feet	Vacancy (Square Feet)	Vacancy Rate
Queens	19,676,446	990,581	5.0%
QBB	47,916,224	3,973,442	8.3%

Source: CoStar Group; AECOM

<sup>1</sup> Includes only Class A and Class B properties.



**Figure 11: Office Trends (Queens, Brooklyn, and Bronx)**

	2007 1Q	2007 2Q	2007 3Q	2007 4Q	2008 1Q	2008 2Q	2008 3Q	2008 4Q	2009 1Q	2009 2Q	2009 3Q
<b>Inventory</b>											
Buildings	1,065	1,066	1,075	1,081	1,087	1,091	1,098	1,103	1,103	1,108	1,112
Square Feet	45,903,783	45,920,060	46,765,625	46,939,567	46,991,999	47,497,661	47,623,619	47,717,348	47,717,348	47,816,711	47,916,224
Change in Inventory	221,963	16,277	845,565	173,942	52,432	505,662	125,958	93,729	-	99,363	99,513
<b>Vacancy</b>											
Square Feet	4,038,102	3,876,595	4,291,778	4,092,469	4,112,752	4,380,000	4,304,600	4,310,437	4,079,913	4,134,412	3,973,442
Vacancy Rate	8.8%	8.4%	9.2%	8.7%	8.8%	9.2%	9.0%	9.0%	8.6%	8.6%	8.3%
<b>Net Absorption</b>	(68,096)	177,784	430,382	373,251	32,149	239,614	202,578	87,892	230,524	44,864	246,342
<b>Average Lease Rate</b>	\$26.46/fs	\$25.97/fs	\$26.28/fs	\$26.58/fs	\$27.54/fs	\$28.01/fs	\$28.74/fs	\$28.63/fs	\$28.37/fs	\$27.81/fs	\$26.92/fs

Source: CoStar Group; AECOM

<sup>1</sup> Includes only Class A and Class B properties.**Figure 12: Office Trends (Queens)**

	2007 1Q	2007 2Q	2007 3Q	2007 4Q	2008 1Q	2008 2Q	2008 3Q	2008 4Q	2009 1Q	2009 2Q	2009 3Q
<b>Inventory</b>											
Buildings	607	608	610	614	617	619	623	623	623	625	627
Square Feet	18,776,995	18,793,272	19,278,269	19,416,531	19,434,763	19,497,086	19,557,912	19,557,912	19,557,912	19,629,912	19,676,446
Change in Inventory	113,423	16,277	484,997	138,262	18,232	62,323	60,826	-	-	72,000	46,534
<b>Vacancy</b>											
Square Feet	1,100,631	1,099,432	1,044,573	1,064,450	1,042,800	1,140,449	1,085,747	1,134,597	938,178	1,025,068	990,581
Vacancy Rate	5.9%	5.9%	5.4%	5.5%	5.4%	5.8%	5.6%	5.8%	4.8%	5.2%	5.0%
<b>Net Absorption</b>	109,854	17,476	539,856	118,385	39,882	(35,326)	116,968	(48,850)	196,419	(14,890)	81,021
<b>Average Lease Rate</b>	\$28.66/fs	\$28.73/fs	\$28.43/fs	\$28.50/fs	\$28.64/fs	\$29.09/fs	\$29.16/fs	\$28.91/fs	\$28.32/fs	\$27.44/fs	\$26.80/fs

Source: CoStar Group; AECOM

<sup>1</sup> Includes only Class A and Class B properties.

**Figure 13: Office Trends (Downtown Jamaica)**

	2007 1Q	2007 2Q	2007 3Q	2007 4Q	2008 1Q	2008 2Q	2008 3Q	2008 4Q	2009 1Q	2009 2Q	2009 3Q
<b>Inventory</b>											
Buildings	31	31	31	31	31	31	31	31	31	31	31
Square Feet	1,642,159	1,642,159	1,642,159	1,642,159	1,642,159	1,642,159	1,642,159	1,642,159	1,642,159	1,642,159	1,642,159
Change in Inventory	-	-	-	-	-	-	-	-	-	-	-
<b>Vacancy</b>											
Square Feet	159,572	163,172	158,788	146,718	144,726	145,595	159,647	169,743	172,241	195,041	192,199
Vacancy Rate	9.7%	9.9%	9.7%	8.9%	8.8%	8.9%	9.7%	10.3%	10.5%	11.9%	11.7%
<b>Net Absorption</b>	(9,300)	(3,600)	4,384	12,070	1,992	(869)	(14,052)	(10,096)	(2,498)	(22,800)	2,842
<b>Average Lease Rate</b>	\$24.71/fs	\$25.15/fs	\$25.13/fs	\$25.07/fs	\$24.92/fs	\$24.48/fs	\$25.16/fs	\$25.16/fs	\$25.16/fs	\$22.41/fs	\$20.44/fs

Source: CoStar Group; AECOM

<sup>1</sup> Includes only Class A and Class B properties.

## Appendix E: Industrial/Flex Trends

**Figure 14: Industrial/Flex Market Snapshot, 2009 Q3**

Market/ Submarket	Existing Square Feet	Vacancy (Square Feet)	Vacancy Rate
Queens	78,630,956	3,326,598	4.2%
QBB	188,046,510	7,105,291	3.8%

Source: CoStar Group; AECOM

**Figure 15: Industrial/Flex Trends (Queens, Brooklyn, and Bronx)**

	2007 1Q	2007 2Q	2007 3Q	2007 4Q	2008 1Q	2008 2Q	2008 3Q	2008 4Q	2009 1Q	2009 2Q	2009 3Q
<b>Inventory</b>											
Buildings	6,413	6,414	6,415	6,416	6,416	6,419	6,424	6,426	6,427	6,427	6,427
Square Feet	187,808,970	187,815,570	187,824,110	187,846,610	187,846,610	187,956,510	188,027,210	188,039,010	188,046,510	188,046,510	188,046,510
Change in Inventory	151,200	6,600	8,540	22,500	-	109,900	70,700	11,800	7,500	-	-
<b>Vacancy</b>											
Square Feet	8,055,765	7,242,799	7,480,500	7,585,518	7,259,943	7,758,904	7,328,602	7,388,266	7,520,059	7,196,601	7,105,291
Vacancy Rate	4.3%	3.9%	4.0%	4.0%	3.9%	4.1%	3.9%	3.9%	4.0%	3.8%	3.8%
<b>Net Absorption</b>	(915,714)	819,566	(229,161)	(82,518)	325,575	(389,061)	501,002	(47,864)	(124,293)	323,458	91,310
<b>Average Lease Rate</b>	\$10.31/nnn	\$11.05/nnn	\$11.44/nnn	\$12.46/nnn	\$12.35/nnn	\$12.04/nnn	\$13.33/nnn	\$12.31/nnn	\$12.18/nnn	\$13.63/nnn	\$13.51/nnn

Source: CoStar Group; AECOM

**Figure 16: Industrial/Flex Trends (Queens)**

	2007 1Q	2007 2Q	2007 3Q	2007 4Q	2008 1Q	2008 2Q	2008 3Q	2008 4Q	2009 1Q	2009 2Q	2009 3Q
<b>Inventory</b>											
Buildings	2,643	2,643	2,644	2,644	2,644	2,646	2,648	2,648	2,648	2,648	2,648
Square Feet	78,462,116	78,462,116	78,470,656	78,470,656	78,470,656	78,574,156	78,630,956	78,630,956	78,630,956	78,630,956	78,630,956
Change in Inventory	76,200	-	8,540	-	-	103,500	56,800	-	-	-	-
<b>Vacancy</b>											
Square Feet	3,478,095	3,202,034	3,309,101	3,524,642	3,444,936	3,661,344	3,351,714	3,362,419	3,535,759	3,470,756	3,326,598
Vacancy Rate	4.4%	4.1%	4.2%	4.5%	4.4%	4.7%	4.3%	4.3%	4.5%	4.4%	4.2%
<b>Net Absorption</b>	(347,036)	276,061	(98,527)	(215,541)	79,706	(112,908)	366,430	(10,705)	(173,340)	65,003	144,158
<b>Average Lease Rate</b>	\$13.60/nnn	\$18.12/nnn	\$16.29/nnn	\$16.76/nnn	\$12.44/nnn	\$11.96/nnn	\$13.24/nnn	\$12.38/nnn	\$12.49/nnn	\$12.62/nnn	\$12.68/nnn

Source: CoStar Group; AECOM

**Figure 17: Industrial/Flex Trends (Downtown Jamaica)**

	2007 1Q	2007 2Q	2007 3Q	2007 4Q	2008 1Q	2008 2Q	2008 3Q	2008 4Q	2009 1Q	2009 2Q	2009 3Q
<b>Inventory</b>											
Buildings	143	143	143	143	143	143	143	143	143	143	143
Square Feet	3,588,461	3,588,461	3,588,461	3,588,461	3,588,461	3,588,461	3,588,461	3,588,461	3,588,461	3,588,461	3,588,461
Change in Inventory	-	-	-	-	-	-	-	-	-	-	-
<b>Vacancy</b>											
Square Feet	185,100	225,100	227,700	303,000	324,464	339,300	351,700	361,000	412,780	375,980	384,980
Vacancy Rate	5.2%	6.3%	6.3%	8.4%	9.0%	9.5%	9.8%	10.1%	11.5%	10.5%	10.7%
<b>Net Absorption</b>	(9,700)	(40,000)	(2,600)	(75,300)	(21,464)	(14,836)	(12,400)	(9,300)	(51,780)	36,800	(9,000)
<b>Average Lease Rate</b>	-	-	-	\$24.00/nnn	\$20.00/nnn	\$20.00/nnn	\$20.00/nnn	\$20.00/nnn	\$20.18/nnn	\$16.45/nnn	\$16.45/nnn

Source: CoStar Group; AECOM

## Appendix C – Market Demand Study (2007)

Project Report

**Jamaica BOA Nomination Study:  
Market Assessment/Demand Analysis**

Prepared for

**Greater Jamaica Development Corp.  
Jamaica, New York**

Submitted by

**Economics Research Associates**

**November 27, 2007**

**ERA Project No. 16740**

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## General & Limiting Conditions

Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible. These data are believed to be reliable. This study is based on estimates, assumptions and other information developed by Economics Research Associates from its independent research effort, general knowledge of the market and the industry, and consultations with the client and its representatives. No responsibility is assumed for inaccuracies in reporting by the client, its agent and representatives or any other data source used in preparing or presenting this study. No warranty or representation is made by Economics Research Associates that any of the projected values or results contained in this study will actually be achieved.

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This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.



## I. Introduction

Prior to the 1960s, the Jamaica section of Queens was New York City's fourth largest business district. Over the last 40 years, several factors have diminished the area's significance within the region. New regional shopping malls have drawn retail activity outside of Downtown Jamaica. The relocation of two banks' headquarters and the newspaper industry resulted in the loss of jobs and economic activity in the area. Regional economic trends and urban disinvestment inhibited growth. However, recent efforts to regenerate the area have been successful. The development of significant cultural, institutional, and retail properties (e.g., York College and Jamaica Avenue Business Improvement District) and investment in local businesses (e.g., the Elmhurst Dairy) are signs of positive change in the area. In addition, the AirTrain terminal connecting to Kennedy Airport, which opened in 2003, has helped to spark new development in Downtown Jamaica.

Greater Jamaica Development Corporation (GJDC) is seeking funding from New York State under the Brownfield Opportunity Areas (BOA) Program to revitalize underutilized, vacant, blighted, and environmentally impaired properties in its focus area of Jamaica. GJDC retained Economics Research Associates (ERA) to assist in the creation of a Nomination Study required for State designation of the Jamaica BOA. The Nomination Study will help GJDC analyze market potential and identify strategic redevelopment sites within the BOA to attract and leverage developer interest.

In an earlier task of this study (Task I), ERA – in conjunction with planning consultant Phillips Preiss Shapiro Associates and brownfields consultant Barry F. Hersh – preliminarily identified strategic sites that warranted further study as part of this analysis. This report represents the culmination of Task II, which assesses market demand for a number of uses in the BOA, including retail, residential, office, and industrial/flex. The next and final task, Task III, will be to formulate strategic site and development recommendations and determine which strategic sites might be best suited for particular uses.

## II. Executive Summary

Greater Jamaica Development Corporation (GJDC) retained Economics Research Associates (ERA) to conduct a market study for the purpose of obtaining funding from New York State under the Brownfield Opportunity Areas (BOA) Program. GJDC is seeking to revitalize underutilized, vacant, blighted, and environmentally impaired properties in the proposed BOA, which encompasses approximately 40 blocks in Jamaica, Queens.

With regional accessibility and visibility, the BOA has significant development potential. To date, development of the area has been hindered by small parcel sizes, outdated zoning, and urban disinvestment, among other factors. In response, the City of New York has proposed transportation/infrastructure enhancements and rezoning. Infrastructure improvements would include street realignments and new one-way streets intended to improve vehicular access and circulation. The rezoning would create new opportunities for transit-oriented growth, with increased densities allowing for 3,400 new housing units and nearly three million square feet of new commercial space within the Jamaica Plan area. With these changes at hand, the BOA is poised to experience an increased rate of growth. However, while improvements – implemented or planned – have created opportunities, existing conditions still reflect the area’s development challenges.

GJDC tasked ERA with analysis of market demand for retail, residential, office, and industrial/flex uses within the BOA. ERA’s analysis utilizes the most current data available to generate quantitative projections of demand. However, in the case of an emerging market, even the most current data may understate future potential. To address this, ERA qualitatively assesses a variety of factors influencing development potential that may not be reflected in the available data.

### *Retail Analysis*

#### **Key Findings**

- The BOA Vicinity is a retail destination that attracts residents from surrounding neighborhoods, the New York Metropolitan region, and other areas in the Northeast.
- The retail market in the BOA Vicinity is vibrant. The area enjoys strong market fundamentals, including low vacancy rates, high rents, and expanding retail offerings.
- Several important retail clusters are located in the BOA Vicinity and shape the character of this important shopping node. Dominant clusters include discount retail, discount apparel, personal care, and food service. Future retail should build upon the retail clusters already present in the area.

- Demand within the Trade Area for new retail development is strong.<sup>1</sup> Retail categories with largest unmet spending potential include general merchandise, food and beverage, restaurants and bars, and clothing/clothing accessories.
- Total retail spending potential of households within the overall Trade Area exceeds \$13 billion annually. Residents of the Primary Trade Area have the potential to spend \$132 million on retail goods and services; Secondary Trade Area residents have the potential to spend \$516 million on retail goods and services; and Tertiary Trade Area residents have the potential to spend \$12.4 billion on retail goods and services, annually.
- Each year, nearly \$5 billion in retail expenditure potential is “leaked” to retailers located outside of the Trade Area. This unmet demand could support more than 14 million square feet of new retail space. As one of the strongest retail nodes in the region, the BOA is a logical and viable area in which to develop new retail that satisfies unmet demand.
- Proposed zoning changes would allow for nearly three million square feet of new commercial space within the Jamaica Plan area.
- Retail trends suggest that the BOA could support new multi-story main street retail, transit-oriented retail, and large-format national tenants, in addition to clustered retail along major pedestrian and vehicular corridors.

## Methodology

ERA’s analysis of the retail market begins with an evaluation of existing retail offerings in the BOA and surrounding neighborhoods. To estimate retail demand, ERA analyzes consumer spending potential and existing retail sales within five-miles of the BOA. The analysis categorizes spending potential and retail sales data by retail format to determine retail potential by store type. ERA relies on consumer spending and retail sales data provided by Claritas, Inc., a nationally-recognized data provider.

## Market Data

The BOA encompasses a lively pedestrian retail district that attracts shoppers from surrounding neighborhoods, the New York City metropolitan region, and other areas in the Northeast. The retail epicenter of Jamaica, the Jamaica Avenue Business Improvement District (BID), is a regional destination for discount and hip-hop style urban clothing. This pedestrian-oriented retail district enjoys low vacancy rates (currently about three percent) and strong retail rents (\$75 to \$90 per square foot).

A retail inventory completed by GJDC in 2007 identified 663 retailers within the BOA Vicinity.<sup>2</sup> The majority of the retailers (63 percent) are Clothing/Clothing Accessories stores,

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<sup>1</sup> The Trade Area is defined as the area encompassed by a five-mile radius centered within the BOA, at the intersection of Archer Avenue and Sutphin Boulevard.

Health and Personal Care stores, or Food Service and Drinking Places. The retail mix in the BOA Vicinity is characteristic of other pedestrian-oriented shopping districts in New York City that are regional shopping destinations, such as the Fulton Street Mall in downtown Brooklyn and Fordham Road in the Bronx.

The character of retail in the BOA Vicinity has recently expanded to include several national retailers. Within the past decade, Old Navy, Zales, the Gap, Children's Place, Radio Shack, and Home Depot have opened branches in the BOA Vicinity. The growing presence of national retailers signals confidence in the retail market and creates opportunities for complementary retailers in the area.

There are approximately 196 retail centers larger than 12,000 square feet totaling about 10.9 million square feet of retail space within five miles of the BOA. Within this group, there are 22 large-format retail centers (between 100,000 and 500,000 square feet) that account for 11 percent of the stores and 44 percent of the retail space. There are marked concentrations of retail west of the Van Wyck Expressway, in Flushing, as well as in Jamaica. Queens Boulevard in Rego Park also has a high concentration of large-scale regional malls. Queens Center and Queens Place Mall, which collectively offer 1.4 million square feet of retail space, are located one block apart on Queens Boulevard, with multiple retail centers surrounding them.

## Demand Projections

ERA conducted a retail demand analysis to determine how much and what types of new retail could be supported within the BOA. The analysis relies on a traditional "retail gap analysis" methodology. The approach compares retail spending potential to existing retail sales within a defined trade area to determine whether retailers in that trade area are fulfilling potential demand. When spending potential exceeds existing sales there is a retail gap, an indication that there is potential for new retail development in the trade area.

The retail gap analysis begins by defining the Trade Area – the area from which the majority of sales (and customers) will come. For this analysis, ERA assumes that the majority of retail sales within the BOA will come from households living within five miles of the BOA. The spending patterns of these households drive the retail market analysis. ERA subdivides the Trade Area as follows:

- *The Primary and Secondary Trade Areas encompass the majority of the client base for retail establishments in the BOA. The Primary Trade Area includes households within ½-mile of the Sutphin/Archer intersection and the Secondary Trade Area includes households between ½- mile and one mile of the Sutphin/Archer intersection.*
- *The Tertiary Trade Area represents the outer ring of customers who will travel to the BOA for retail offerings, and includes households between one mile and five miles from the Sutphin/Archer intersection.*

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<sup>2</sup> BOA Vicinity refers to a ½-mile radius (centered at the intersection of Archer Avenue and Sutphin Boulevard) that encompasses the entire BOA.

Within the Primary Trade Area, retail sales exceed local expenditure potential by over \$187 million, indicating that households within the Primary Trade Area are well served (i.e., no retail gap exists). The BOA is a retail destination that attracts consumers who live outside of the Primary Trade Area. General Merchandise Stores, Health and Personal Care Stores, Building Material and Garden Equipment Stores, and Food and Beverage Stores represent the largest sources of retail sales inflow (i.e., sales in excess of expenditure potential) within the Primary Trade Area.

Within the Secondary Trade Area, the retail gap (i.e., expenditure potential in excess of retail sales) is greater than \$100 million, which indicates that residents are leaving the Secondary Trade Area in order to purchase some retail goods and services. Retail store types with the greatest sales leakage include General Merchandise Stores, Food and Beverage Stores, and Foodservice and Drinking Places.

Within the Tertiary Trade Area, over \$4.1 billion in expenditure potential is spent on retail purchases outside of the trade area. Retail potential (a retail gap) exists in every merchandise category.

ERA relies on retail spending statistics compiled in the *Urban Land Institute Dollars and Cents of Shopping Centers* publication to quantify how much additional retail development could be supported by unmet spending potential of residents within the Primary, Secondary and Tertiary Trade Areas. ERA estimates that the nearly \$5 billion in leaked expenditure potential could support roughly 14 million square feet of new development within the five-mile ring surrounding the BOA.

Of the 14 million square feet of supportable new retail space, almost half is projected to be General Merchandise stores. However, as one of the major retail centers within the Trade Area, the BOA is a promising location for a variety of new retail store types. Retail analysis and trends suggest that the BOA could support new multi-story main street retail, transit-oriented retail, and large-format national tenants, in addition to clustered retail along major pedestrian and vehicular corridors.

## Residential Analysis

### Key Findings

- Community District 12 (CD 12), which includes the BOA, has a relatively high rate of homeownership and greater proportions of school-age residents and middle-income households, as compared with Queens. While households with children are a target market, new residential development within the BOA should provide a mix of homeownership and rental opportunities available to the diversity of people that are likely to relocate within or to the area.
- The median price for single family homes in CD 12 nearly doubled from 1995 to 2005 and is currently about \$350,000. While rising prices are attracting developers to the area, sale prices and rents are lower than Queens overall, making Jamaica an affordable alternative to other areas of Queens.

- CD 12 is largely comprised of one- and two-family residential properties. However, the proposed rezoning of Jamaica will increase density in the area proximate to Jamaica's transportation infrastructure. In addition, the down-zoning of other neighborhoods to preserve low density could channel new development toward the BOA, which includes Jamaica's transportation center.
- The number of housing units in CD 12 increased at a relatively brisk pace between 1999 and 2005, with greater growth (in percentage terms) than Queens overall, Manhattan, and Brooklyn during this period. IRS data indicate that of the nearly 39,000 households that moved into Queens in 2004, the greatest percentages came from Brooklyn, Manhattan, and Nassau County. With housing prices rising significantly in these three markets, the residents of these areas are an important target market for new residential development in CD 12.
- Roughly 30 percent of residences are approximately 70 years old or older. As housing ages, consumers will likely seek new housing alternatives.
- ERA conducted a fair-share analysis to determine the number of new residential units that could be absorbed in CD 12 annually. The analysis indicates demand for roughly 7,300 units per year, including both new and existing product. However, in light of various changes in the area – rezoning, infrastructure improvements, and new development – CD 12 could capture a greater share of housing demand in the future.
- Proposed zoning changes would allow for 3,400 new residential units within the Jamaica Plan area.
- New residential projects are being built in response to current market demand. Known projects in various stages of planning and construction will add 692 units in the next two to three years. Planned development includes mixed-use, mixed-income, and mixed-tenure projects.

## Methodology

ERA's residential market analysis focuses on housing demand within CD 12 and Queens. The analysis closely examines household migration patterns and the demographic composition of each area as well as current residential market conditions, including vacancy and pricing. ERA relies on a fair-share approach to determine the number of new residential units that could be absorbed in CD 12 annually. In addition, ERA researched recent residential developments proximate to the BOA.

## Market Data

According to the New York City Housing and Vacancy Survey, the number of housing units in CD 12 grew at a faster rate than Queens overall, Manhattan, and Brooklyn between 1999 and 2005. The rate of new development in CD 12 is at least partially attributable to the age of the existing housing stock (roughly 30 percent of residences in CD 12 are 70 years old or older).

Rising housing prices in CD 12 are attracting developers to the area. The median prices for single family homes in CD 12 nearly doubled from 1995 to 2005. However, home prices in CD 12 remain lower than Queens overall, making the location an affordable alternative to other neighborhoods in Queens. Furthermore, there is a healthy rental market in CD 12, as evidenced by the low vacancy rate of 2.7 percent (reported in 2005) and relatively affordable rents.

## **Demand Projections**

ERA relies on a fair share analysis to determine the number of new residential units that could be absorbed in CD 12 annually. In 2005, approximately 10.3 percent of Queens households reported having moved within or to the borough during the previous year. Applying this proportion to the estimated 786,798 Queens households in 2006, ERA estimates that annual demand for housing is 81,265 units. This estimate of demand reflects the number of households that made housing decisions in 2006 (i.e., home purchases or rental leases).

ERA calculates the fair share of residential demand in CD 12 based on the proportion of Queens households located within the Community District, which is roughly nine percent. The fair share calculation indicates demand for roughly 7,300 units per year in CD 12, including both new and existing for-sale and rental product. However, in light of positive improvements to the area – rezoning, infrastructure improvements, and new development – CD 12 could capture a greater share of housing demand in the future.

## **Potential Markets**

Consumers of new residential units in CD 12 would likely include existing area households interested in expanding, downsizing, or moving into new housing. ERA research indicates that the majority of demand for new housing in CD 12 would come from within the Community District, adjacent neighborhoods, and other parts of Queens. In addition, households currently living outside of Queens could be attracted by Jamaica’s transit hub, which offers subway, bus, regional rail, airport, and highway access.

Family households, young professionals, and empty nesters are likely to seek housing in CD 12. Demographic data show that households with children that are common in CD 12. National and regional trends indicate a movement by young professionals from expensive urban cores such as Manhattan to more affordable locations that are within walking distance of commuter transit lines and near retail shops and services. This trend is apparent in cities such as White Plains, Jersey City, and Long Island City. Additionally, ERA anticipates housing demand from households comprised of empty nesters. ERA’s analysis of demographics in the CD 12 neighborhoods of Hollis and St. Albans shows high homeownership rates and a significant share of households age 55 and older, which suggests good potential for an “age-in-place” housing product tailored to empty nesters. National housing trends support this, indicating that aging baby boomers are selling their homes and downsizing to apartments within the same or nearby communities.



## Development Projects

Several residential development projects have been completed or are planned in response to market demand. In 2005, Yorkside Towers, the first multi-family residential property built in Downtown Jamaica in over 30 years, was completed. It features rental apartments at middle-income price points.

In addition, approximately 692 units will be added to the area in the next two or three years. They include mixed-use, mixed-income and mixed-tenure projects. For instance, the Dermott Company is planning to build 350 units in the building that formerly housed the Queens Family Courthouse. The units will include affordable co-ops and rental apartments at market-rate, middle-income, low-income rent levels. If the rezoning is approved, the Bluestone Organization will build two residential buildings (fronting 161st Street) containing 87 affordable and market-rate co-ops and middle-income rental apartments.

## Office Analysis

### Key Findings

#### Employment Trends, Projections, and Demand for Office Space

- Office-using industry sectors including education and health services, professional business services, finance, and information added about 45,000 jobs in Queens between 1990 and 2005.
- Detailed analysis of occupational employment projections indicates that Queens will add about 1,800 office-using positions annually through 2014.
- ERA estimates that net new office-using jobs in Queens will support development of roughly 450,000 square feet of office space annually.
- If the Jamaica Office Submarket Area captures its fair share of demand, the Area will attract development of 950,000 square feet of new office space over the next five years.

#### Office Market Trends

- Queens, Brooklyn, and the Bronx (the QBB Office Market Area) constitute an office market area with over 50 million square feet of office space.
- There are approximately 21 million square feet of office space in Queens, roughly 40 percent of the QBB Office Market Area total.
- Vacancy in Queens is healthy at 6.7 percent of inventory, lower than the 8.7 percent vacancy reported in the QBB Office Market Area.
- Annual gross absorption of office space averaged nearly 2.9 million square feet in the QBB Office Market Area and 1.1 million square feet in Queens between 2002 and 2006.
- The Jamaica Office Submarket Area contains approximately 352 buildings with over 8.9 million square feet of office space.

- Annual gross absorption in the Jamaica Office Submarket Area averaged about 340,000 square feet annually 2002 through 2006.
- Average gross demand for office space in the Jamaica Office Submarket over the last five years suggests that demand for 1.7 million square feet of office space could be realized over the next five years.

#### **Potential for Accelerated Office Development**

- Increasingly high lease rates and low vacancy rates in Manhattan have the potential to increase demand for office space in Queens.
- Proposed zoning changes would allow for nearly three million square feet of new commercial space within the Jamaica Plan area.
- A targeted campaign to attract businesses seeking build-to-suit sites for office space could stimulate demand for office space in the BOA.
- Assembling shovel-ready sites for development will increase the attractiveness of the BOA to potential developers.

#### **Methodology**

ERA's analysis of market demand for office space provides a qualitative assessment of development potential. In addition, the analysis relies on historical employment trends and projected employment growth to quantify demand. ERA also closely examined real estate market conditions and trends to inform projections of future demand for office space.

#### **Qualitative Assessment of Development Potential**

The potential for the BOA to attract office development in the future will benefit from existing transit opportunities, proximity to Kennedy Airport, the proposed rezoning, an increasingly well-educated workforce, and rising office lease rates in Manhattan. While speculative office development is unlikely, a targeted campaign to attract businesses seeking build-to-suit sites could stimulate demand for office space in the BOA. Potential tenants include:

- Regional firms looking for new space (wired, large, and amenitized spaces are desired);
- Airlines, airline vendors, logistics companies;
- Health care firms and related supporting services;
- Community groups (not-for-profit organizations);
- Manhattan firms looking for economical back office space with proximity to transportation; and
- Firms with employees living in nearby areas (e.g., Queens and Nassau Counties).

Additionally, assembling larger, shovel-ready sites for development will increase the attractiveness of the BOA to potential developers interested in constructing competitive and efficient large-floorplate office buildings.

## Development Projects

Examination of current office development projects and proposals in Queens supports the notion of build-to-suit office development. The following office projects generally support the concept that larger office spaces with a predetermined anchor tenants are most likely to succeed in the BOA:

- A ground lease was recently signed with JFK Center Associates to develop a 900,000 square foot building on Sutphin Boulevard, of which approximately 550,000 is in negotiation for use as a merchandise mart.
- Court Square Place (completed 2006) in Long Island City is a 16-story, 275,000-square-foot building owned, operated, and partially occupied by the United Nations Federal Credit Union.
- Citigroup is constructing a 15-story, 528,000 square foot, office tower in Long Island City. When completed, Citigroup will occupy two million square feet in Long Island City.
- The Pistilli Realty Group is constructing a 10-story, 70,000 square foot office building in Astoria to be anchored by a local government agency.

In addition, mixed-use projects offer an opportunity to develop smaller office spaces. For example, the Bluestone Organization is planning 20,000 square feet of office space in a four-story building with retail on the ground level, to be located on 160<sup>th</sup> Street in Jamaica. Bluestone will occupy half of the office space. The Pistilli Realty Group has also discussed converting the historic Jamaica Savings Bank to office space.

## Market Data

ERA's office market analysis considers the QBB Office Market Area, which encompasses 50 million square feet of office space, including nearly 5 million square feet that were added over the past nine years. Currently, there are approximately 21 million square feet of office space in Queens, approximately 40 percent of the total QBB Office Market Area. Net absorption of space (leased space minus vacated space) in the QBB Office Market Area has been erratic as the Area experienced sporadic positive net absorption in the late 1990s and early 2000s. In total, there was net absorption of approximately two million square feet in the nine years from 1997 through 2006, with approximately 1.3 million square feet absorbed between 2001 and 2006. Office vacancy is currently under nine percent in the QBB Office Market Area.

The Jamaica Office Submarket Area contains approximately 352 buildings with roughly 8.9 million square feet of office space. According to the CoStar Group, about 330,000 square feet of new office space has been added to the Jamaica Office Submarket Area over the last nine years (net of demolitions).

## Demand Projections

Office-using industry sectors in Queens, including education and health services, professional business services, finance, and information, added roughly 45,000 jobs between 1990 and 2005. The New York State Department of Labor projects that Queens will add about 1,800 office-using positions annually through 2014. ERA estimates that these new jobs will support the development of 450,000 square feet of office space annually in Queens. If the Jamaica Office Submarket Area captures its fair share of demand (i.e., the proportion of office development that the Area has achieved historically), the Area will realize development of 950,000 square feet of new office space over the next five years.

Examining demand from another perspective, ERA reviewed gross absorption patterns. Annual gross absorption in the Jamaica Office Submarket Area averaged about 340,000 square feet annually between 2002 and 2006 (by comparison, Queens achieved average annual gross absorption of nearly 1.1 million square feet of office). The average gross absorption of office space in the Jamaica Office Submarket Area over the last five years suggests that gross demand for 1.7 million square feet of office space is realistic for the period 2007 through 2011.

## Industrial Analysis

### Key Findings

#### Employment Trends, Projections, and Demand for Industrial/Flex Space

- Overall, the industrial/flex-using industry sectors have eliminated jobs in recent years. However, a number of industrial/flex-using industry sub-sectors, including merchant wholesalers, warehouse and storage, and electronics markets agents/brokers, have added jobs since 2000.
- Occupational employment projections indicate that Queens will add about 900 industrial/flex-using positions annually through 2014.
- ERA estimates that new industrial/flex-using jobs in Queens will require roughly 360,000 square feet of industrial/flex space annually.
- If the Jamaica Industrial/Flex Submarket Area captures its fair share of demand, the area will attract development of 470,000 square feet of new industrial/flex space over the next five years.

#### Industrial/Flex Market Trends

- Queens, Brooklyn, and the Bronx (the QBB Industrial/Flex Market Area) constitute an industrial/flex market area with roughly 166 million square feet of space.
- There are approximately 70 million square feet of industrial/flex space in Queens, roughly 40 percent of the QBB Industrial/Flex Market Area total.
- Vacancy in Queens is healthy at 4.4 percent of inventory, though higher than the 4.1 percent vacancy in the QBB Industrial/Flex Market Area.

- Gross absorption of industrial/flex space averaged 5.5 million square feet in the QBB Industrial/Flex Market Area and 2.6 million square feet in Queens between 2002 and 2006.
- The Jamaica Industrial/Flex Submarket Area contains approximately 689 buildings with nearly 18 million square feet of space.
- Gross absorption in the Jamaica Industrial/Flex Submarket averaged about 671,000 square feet annually 2002 through 2006.
- Average gross absorption of industrial/flex space in Jamaica suggests that gross demand for 3.4 million square feet of industrial/flex space could be realized over the next five years.

#### **Potential for Accelerated Industrial Development**

- Zoning changes throughout New York City have the potential to increase demand for industrial development in Jamaica, as residential development in many neighborhoods replaces industrial uses.
- Proposed zoning changes in Jamaica would allow for nearly three million square feet of new commercial space within the Jamaica Plan area.
- A targeted campaign to attract businesses seeking sites for build-to-suit industrial/flex development could stimulate demand for space in the BOA.
- Assembling shovel-ready sites for development will increase the attractiveness of the BOA to potential developers.

#### **Methodology**

ERA's analysis of market demand for industrial/flex space involves a qualitative evaluation of development potential. In addition, the analysis relies on historical employment trends and projected employment growth to quantify demand. ERA also closely examines real estate market conditions and trends to inform projections of future demand for industrial/flex space.

#### **Qualitative Assessment of Market Potential**

The potential for the BOA to attract industrial/flex development in the future will benefit from existing highway infrastructure, proximity to Kennedy Airport, the proposed rezoning, and proximity to a diverse workforce. Additionally, zoning changes throughout New York City, and particularly in Long Island City, have the potential to increase demand for industrial development in Jamaica as residential development displaces industrial uses.

As with office development, ERA does not anticipate that the BOA will undergo a wholly organic development boom in the near future. Developers are unlikely to build industrial/flex space without first establishing an agreement with an anchor tenant. Thus, a targeted campaign to identify and incentivize businesses seeking build-to-suit sites could stimulate demand for industrial/flex space in BOA. Potential tenants include:

- Industrial uses relocating from other areas within New York City (e.g., food manufacturing);
- Technical service providers (electronic and mechanical);
- Wholesale trade companies; and
- Warehousing, distribution, and logistics firms.

Assembling shovel-ready sites will increase the attractiveness of the BOA to potential industrial/flex developers/users. This would resolve the issue of disparate property ownership in the area, and create the large tracts needed to construct desirable industrial/flex buildings.

## Development Projects

ERA examined current industrial/flex development projects in Queens to gather insights applicable to the BOA. The following projects generally support the concept that larger industrial/flex facilities with a predetermined anchor tenant are most likely to succeed in the BOA:

- FedEx affiliate Steel Equities is building a new 225,265-square-foot facility in Astoria, Queens. The new location will serve as Fed Ex's eighth overnight transfer center in the US.
- Three businesses are building two facilities at the College Point Industrial Park. ARES Printing & Packaging will move its headquarters to College Point from Brooklyn after constructing a 75,000-square-foot facility. New York Sign City of Flushing, Queens, and Inland Paper Products of Brooklyn will share a building of similar size.

## Market Data

Queens, Brooklyn, and the Bronx comprise an industrial/flex market area (referred to as the QBB Industrial/Flex Market Area) with roughly 166 million square feet of space. Over the past nine years, the QBB Industrial/Flex Market Area has added over 2.3 million square feet of space. Currently, there are approximately 70 million square feet of industrial/flex space in Queens, roughly 40 percent of the QBB Industrial/Flex Market Area. The Market Area experienced significant net absorption of industrial/flex space during the late 1990s and early 2000s. From 1997 through 2006, net absorption in the Market Area totaled 1.2 million square feet with significant positive absorption occurring from 2001 to 2006. The vacancy rate in the Market Area is currently about 4.1 percent.

The Jamaica Industrial/Flex Submarket Area contains approximately 689 buildings with nearly 18 million square feet of industrial/flex space. According to CoStar Group, the Jamaica Industrial/Flex Submarket Area has added 531,000 square feet of industrial/flex space over the last nine years.

## Demand Projections

New York State Department of Labor employment statistics indicate that overall there has been a decrease in the number of manufacturing, wholesale trade, transportation and warehousing, and other service jobs in Queens in recent years. However, detailed data indicate that a number of industrial/flex-using industry sub-sectors, including merchant wholesalers, warehouse and storage, and electronics markets agents/brokers, have added jobs since 2000. Detailed analysis of occupational employment projections indicates that Queens will add about 900 industrial/flex-using positions annually through 2014.

ERA estimates that the projected growth in industrial/flex-using jobs in Queens will require development of roughly 360,000 square feet of new industrial/flex space annually. If the Jamaica Industrial/Flex Submarket Area captures its fair share of demand (i.e., the proportion of development that the Area has achieved historically), the Area will attract development of 470,000 square feet of new industrial/flex space over the next five years.

Estimating demand from another perspective, ERA reviewed gross absorption patterns. Gross absorption in the Jamaica Industrial/Flex Submarket Area averaged about 670,000 square feet annually between 2002 through 2006 (by comparison, Queens achieved average annual gross absorption of 2.6 million square feet of industrial/flex space). Average gross absorption of industrial/flex space in Jamaica Industrial/Flex Submarket Area suggests that gross demand for 3.4 million square feet is realistic for the period 2007 through 2011.

## Market Study Conclusions

ERA's analysis concludes, based on the most recent and comprehensive data available, that:

- Retail trends suggest that the BOA could support new multi-story main street retail, transit-oriented retail, and large-format retail anchored by national tenants.
- Residential market trends indicate demand for over 7,000 housing units per year; and
- Employment and market trends indicate demand for between 950,000 square feet of speculative office space and between 470,000 square feet of speculative industrial/flex space over the next five years.

There are a number of factors including access to transportation infrastructure, zoning changes, and market pressures that suggest significant additional potential for development of these uses. For instance, residential demand could be enhanced by growing regional interest in mixed-income, mixed-use housing near transit and retail or industrial demand might increase as residential development displaces industrial uses in other areas of the City.

There are a number of steps that can be taken to further cultivate demand for office and industrial/flex uses in the BOA. For example, assembling suitable development sites, targeting potential tenants for build-to-suit development, and incentivising development and business activities have the potential to promote development. By matching an appropriate



site to the right developer/tenant and properly encouraging the project, the BOA is likely to successfully capture demand from the competitive market area.

### III. Study Area Overview

The proposed BOA encompasses approximately 40 blocks in Jamaica, Queens. The BOA is generally bounded by Jamaica Avenue to the north, South Road to the south, 158<sup>th</sup> Street to the east, and Waltham Street and the Van Wyck Expressway to the west (see Figure 1 below). The BOA area traverses the Long Island Rail Road (LIRR) tracks, with the majority located south of the tracks.

**Figure 1 : Brownfield Opportunity Area**



Source: Phillips Preiss Shapiro Associates

Redevelopment in the BOA may be affected by numerous factors, several of which were identified during the pre-nomination process and by previous planning efforts and vision studies.

The area has a number of strengths that may aid the process of redevelopment. As a whole, the BOA has superior access to transit, including multiple subway and bus lines, Long Island Railroad (LIRR), and AirTrain access to the Kennedy Airport. In addition, the area offers direct connections to the Van Wyck Expressway and major arterial streets within Queens.

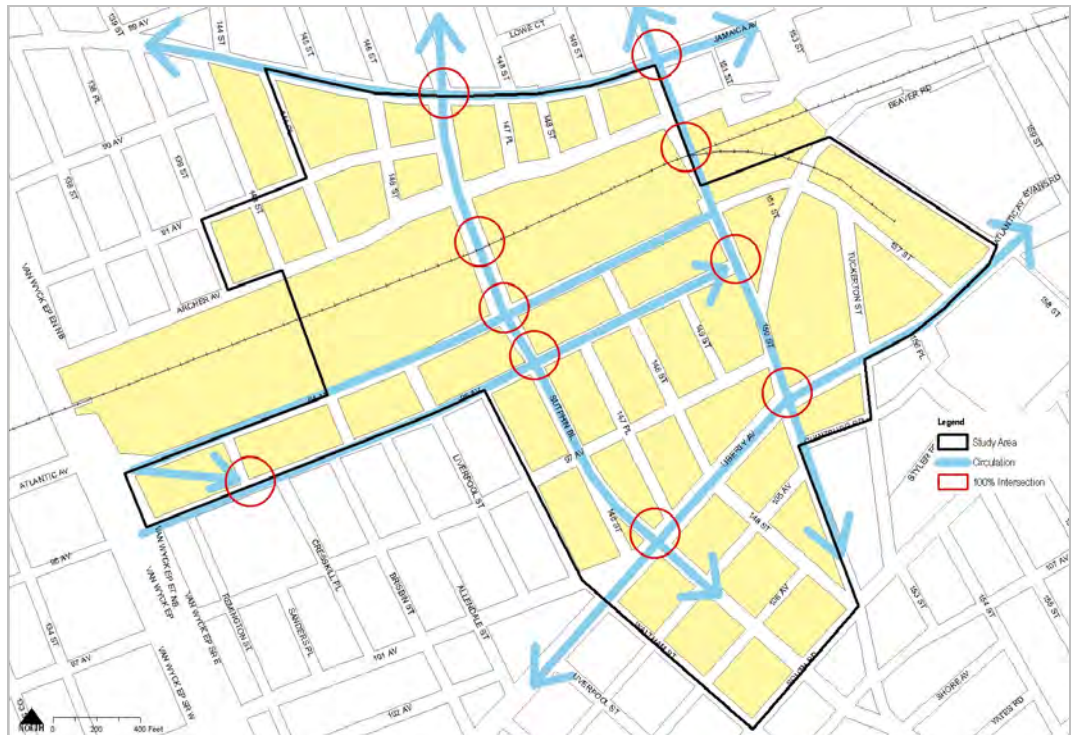
The area is bordered to the east by three of Jamaica's major economic development drivers: York College, the Food and Drug Administration Laboratory, and the Elmhurst Dairy processing plant. The BOA also falls in or near several State and local economic development zones, including the South Jamaica Empire Zone and the Jamaica Industrial Business Zone.

Despite the numerous advantages of the area, there may also be a number of challenges to redevelopment. Within the 40 blocks of the BOA, over 120 tax lots have been flagged as “underutilized” by past surveys. The majority of land parcels in the BOA are small, ranging in size from 2,000 to 65,000 square feet, with disparate, private ownership. Larger scale redevelopment will require land assemblage, which is often an expensive, risky, and time-consuming process. Redevelopment may be further complicated by the environmental condition of individual sites as assessment and remediation can be challenging.

### **Infrastructure Improvements**

Several infrastructure initiatives planned for the BOA are likely to provide new opportunities for revitalization and growth. The planned enhancements, illustrated in Figure 2, will improve vehicular access to the area and traffic flow within the area. Plans call for expanding and realigning Atlantic Avenue, improving access from the Van Wyck Expressway, and making 94th and 95th Avenues a pair of one-way streets. These improvements will increase the visibility at some intersections, making them more attractive for commercial development, particularly retail uses. Another important transportation project will realign Archer Avenue to ease traffic congestion and improve pedestrian circulation. In general, the east/west access improvements, coupled with the existing north/south corridors (Sutphin Boulevard and 150th Street), will better connect the BOA with the rest of Jamaica, New York City, and the region.

GJDC is also planning to rehabilitate the Sutphin Boulevard Underpass at the Jamaica Transportation Center. The proposed project will improve pedestrian conditions under the Sutphin Boulevard Underpass by providing increased lighting; reconfiguring and consolidating the loading dock operations to the southernmost part of the project site, where the pedestrian volumes are lower; and by removing the parking that currently exists on the project site. In addition, about one-third of the space at this location (approximately 5,500 square feet) will be configured to create retail space that will serve the transit hub users.

**Figure 2: BOA Access and Circulation**

Source: Phillips Preiss Shapiro Associates

## The Jamaica Plan for Rezoning

New York City officials recognize that Jamaica has substantial growth potential but inadequate and outdated zoning. Recent developments have required individual lot rezoning. In response, the New York City Department of City Planning (DCP) has proposed a comprehensive rezoning of approximately 368 blocks in Downtown Jamaica (see Figure 3; the BOA is outlined in red). The City's goals, which are articulated in the Jamaica Plan EIS, are to strengthen economic opportunities in the downtown, curb over-development in low density areas and foster more orderly, well-planned growth.

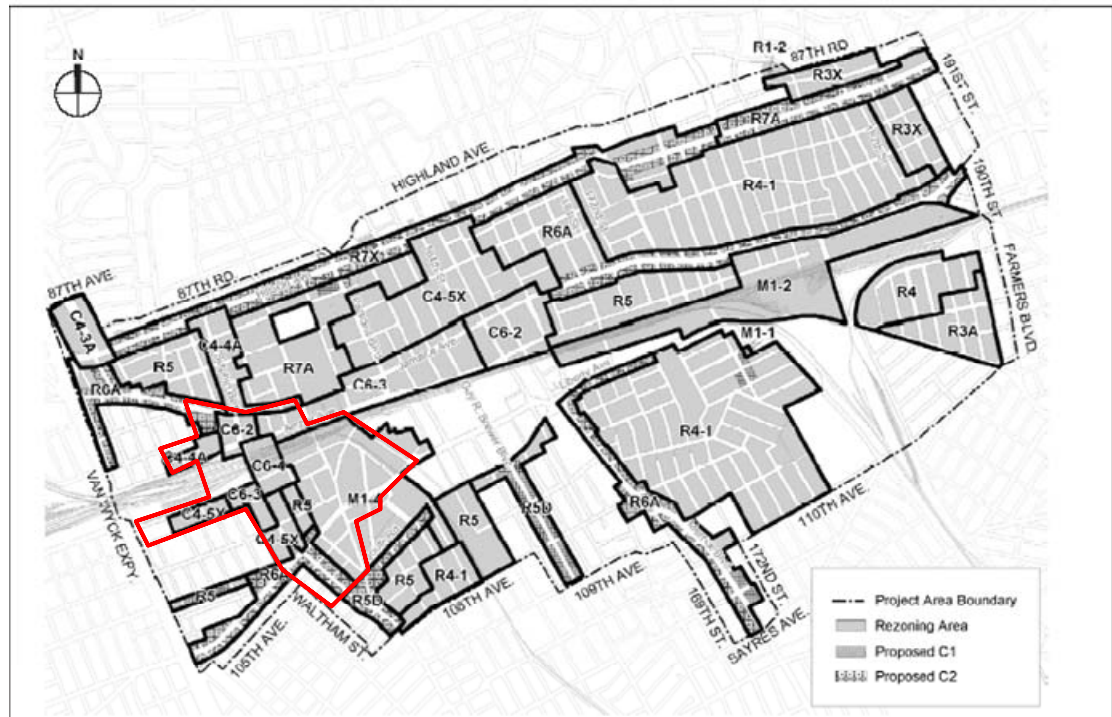
In February 2007, the DCP issued a Draft Environmental Impact Statement (DEIS) proposing zoning changes designed to foster the continued growth of Downtown Jamaica as a central business district and take advantage of the area's excellent mass transit opportunities to create new transit-oriented growth. The proposed action would create new opportunities for retail, office, and residential development. According to DCP:

*Current zoning in much of Downtown is outdated and unduly limits reasonable economic growth and expansion of the downtown. With the exception of a small number of sites in the existing urban renewal areas that are now developed, zoning densities are relatively low for an area with exceptional transportation infrastructure. (Jamaica Plan EIS)*

In total, the rezoning could add up to 3,400 new housing units and nearly 3 million new square feet of commercial space. DCP is also considering including mixed-income housing requirements to the rezoning plan.

The zoning would increase density in the majority of the BOA area, allowing for more mixed-use commercial/residential development opportunities, particularly along Jamaica Avenue, Sutphin Boulevard and 95<sup>th</sup> Avenue. The core of the BOA area would contain the highest density zone, with proposed Floor Area Ratios (FAR) of 6, 8, 10, and 12. The new zoning would also support industrial growth in the eastern portion of the BOA. At the same time, DCP proposes to lower density in portions of the rezoning area, which would make the BOA the designated location to absorb growth. Similarly, as the City's designated regional center for southeast Queens, Downtown Jamaica also has the potential to capture additional development pressure displaced by rezoning in other parts of the City.

**Figure 3: Jamaica Plan Rezoning**

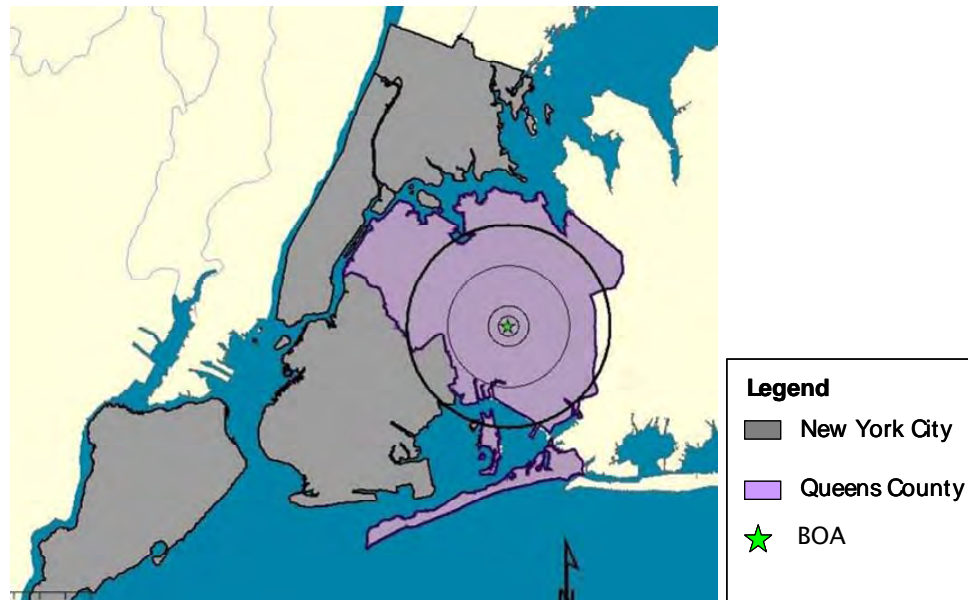




#### IV. Demographic Overview

Located in the heart of Queens, Jamaica is an important transportation, cultural, and retail hub for New York City. To provide context and a foundation for market analysis, this section provides analysis of the demographic and socioeconomic trends in BOA Vicinity, Queens County, and the City of New York. The geographic areas considered in the demographic analysis are mapped in Figure 1 and described below:

**Figure 4: Demographic Study Areas**



Source: ESRI; Economics Research Associates

- Brownfield Opportunity Area (BOA) Vicinity:* Due to the irregular shape of the BOA, ERA analyzes the area located within a half-mile radius of Jamaica's transportation hub (using the intersection of Sutphin Boulevard and Archer Avenue as the center point). This area, referred to throughout this report as the BOA Vicinity, contains approximately 6,500 housing units, significant retail amenities (e.g., the Jamaica Avenue Business Improvement District), public and private sector office uses, industrial uses, and open space (e.g., Rufus King Park).
- Queens County:* Queens is geographically the largest of the five New York City boroughs and the second most populous. According to the 2000 Census, Queens had a resident population of 2.2 million and is the most ethnically diverse county in the United States. According the Quarterly Census of Earnings and Wages, there are nearly 500,000 jobs based in Queens. Both La Guardia and Kennedy Airports are located in Queens.
- New York City:* New York City is the most populous city in the United States and is an international center for business, finance, law, media, diplomacy, arts, and culture. The city is composed of five boroughs: The Bronx, Brooklyn, Manhattan, Queens, and Staten Island. Approximately 8.3 million residents currently live in New York City.

ERA's demographic study includes the analysis of population, income, and age characteristics within the Borough of Queens and New York City. The following pages highlight the key socioeconomic trends that inform the market analysis and redevelopment recommendations.

## Population

New York City has added nearly one million residents since 1990, roughly 686,000 between 1990 and 2000 and approximately 263,000 2000 through 2006. The current population of the City is roughly 8.3 million. Between 1990 and 2006, Queens added over 300,000 residents, almost entirely during the 1990s. The current population of Queens is approximately 2.3 million, about 27 percent of the City population.

**Figure 5: Population Estimates (1990-2006)**

	1990	2000	2006	Population Growth		
				'90-'00	'00-'06	'90-'06
Queens	1,951,598	2,229,379	2,262,603	277,781	33,224	311,005
NYC	7,322,564	8,008,278	8,270,881	685,714	262,603	948,317

Source: ESRI Business Analyst; Economics Research Associates

In 2006, the City of New York commissioned a special study to project population growth by age and gender for each borough covering the years 2000 to 2030. This information was the basis for PlaNYC, Mayor Bloomberg's plan to enhance New York City by 2030, issued in April 2007.

According to PlaNYC, New York City is projecting steady population growth, in the range of 0.3 to 0.5 percent annually, through 2030. The City projects that the rate of population growth in Queens will range from 0.2 to 0.7 percent annually over that period. Between 2010 and 2030, the rate of growth in Queens is projected to exceed the rate of growth in New York City overall. The projections indicate that New York City's population will grow to about 9.1 million, with Queens accounting for 2.6 million, by 2030. Figure 6 summarizes the City's projections for growth in Queens and New York City.



Figure 6: Population Growth Projections (2000-2030)

	2000	2010	2020	2030	Annual Growth Rate		
					'00-'10	'10-'20	'20-'30
Queens	2,229,379	2,279,674	2,396,949	2,565,352	0.2%	0.5%	0.7%
NYC	8,008,278	8,402,213	8,692,564	9,119,811	0.5%	0.3%	0.5%

Source: New York City Population Projections by Age/Sex & Borough 2000-2030;  
Economics Research Associates

## The Jamaica Plan – Allowing for Additional Population Growth

The New York City Department of City Planning (DCP) has proposed a zoning change in Jamaica to allow for additional population growth there. The Jamaica Plan Project Area consists of roughly 368 blocks, including the Downtown Jamaica and the adjacent and nearby residential communities of Jamaica, South Jamaica, Hollis, and St. Albans.

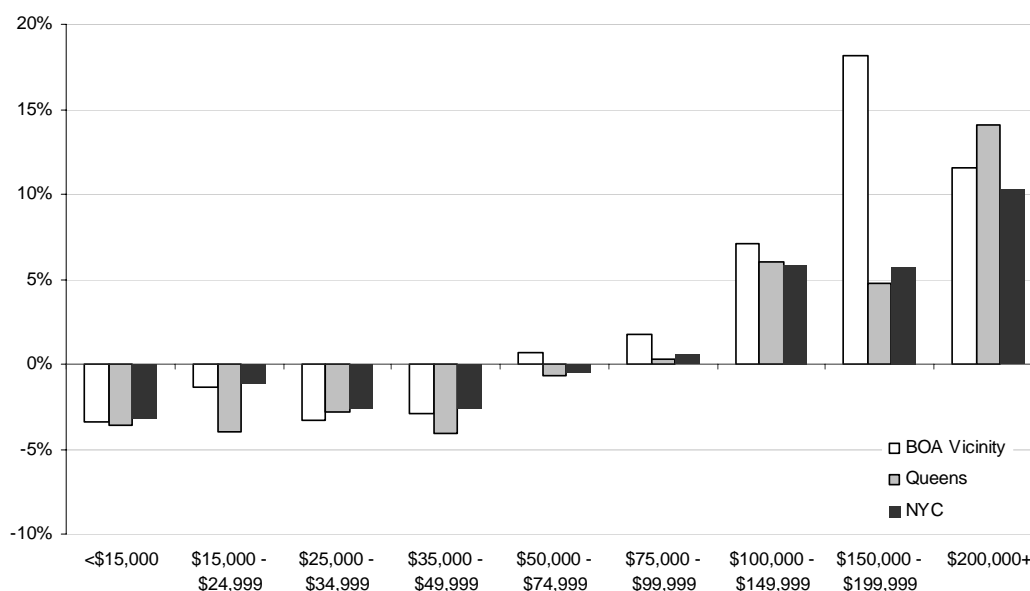
The proposed Jamaica Plan would encourage residential development in areas with excellent subway, bus, and train access, including the BOA Vicinity. According to the EIS, without the Jamaica Plan the Project Area would add 1,816 residential units, versus 5,198 residential units with the zoning change, a difference of 3,382 units. Based on average household size, DCP expects the zoning change to allow the Project Area to accommodate 10,755 additional residents, above current zoning.

While it is unclear exactly how many additional residential units the Jamaica Plan would allow within the BOA, an examination of zoning sub-areas that overlap with the BOA indicates that the zoning change would increase opportunities for residential development there. Specifically, the BOA overlaps with zoning sub-areas JC1, LC, B, O, S, and Y (See the Jamaica Plan DEIS for additional detail). The Jamaica Plan would allow a total of 1,125 new residential units within these zoning sub-areas, 908 more residential units than are allowable under current zoning. Based on average household size, the zoning change would allow the BOA-intersecting zoning sub-areas to accommodate 2,887 additional residents, above current zoning.

## Income Distribution

According to ESRI, a nationally-recognized provider of demographic information, 41 percent of the BOA Vicinity population earned below \$35,000 and 23 percent earned above \$75,000 in 2006. However, Figure 7 indicates that income distribution in the BOA Vicinity is poised to shift. The number of households earning between \$150,000 and \$200,000 is expected to grow annually by a dramatic 18 percent between 2006 and 2011. At the same time, the number of households in the BOA Vicinity earning below \$75,000 is expected to decrease annually by four percent.

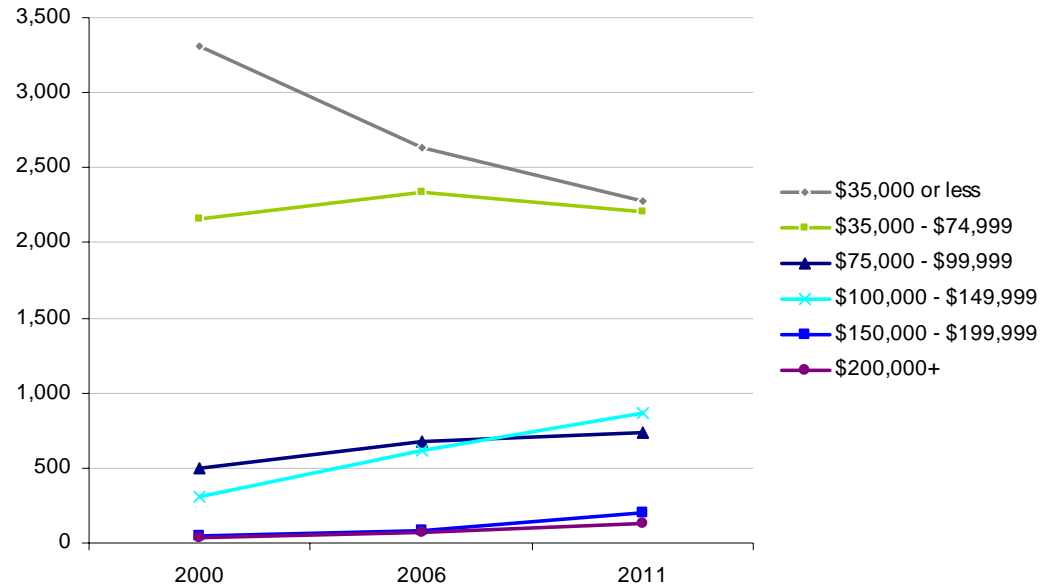
**Figure 7: Annual Household Income Growth (2006-2011)**



Although the greatest growth is projected for households earning over \$100,000 annually, more affluent households make up the smallest income group in the BOA Vicinity. Figure 8 illustrates growth trends and projections for each income bracket in BOA Vicinity. Although the number of households earning below \$75,000 annually is projected to decline, as shown in Figure 7, lower-income households will continue to comprise the largest share of the local population, as demonstrated in Figure 8.

Figure 7 and Figure 8 also indicate that, while households which earn over \$150,000 annually are projected to experience the largest percentage growth, these income groups will continue to represent the minority of households in the BOA Vicinity. According to ESRI, 70 percent of households in the BOA are projected to earn below \$75,000 annually and five percent are projected to earn above \$150,000 annually in 2011.

**Figure 8: BOA Vicinity Income Brackets (2000-2011)**

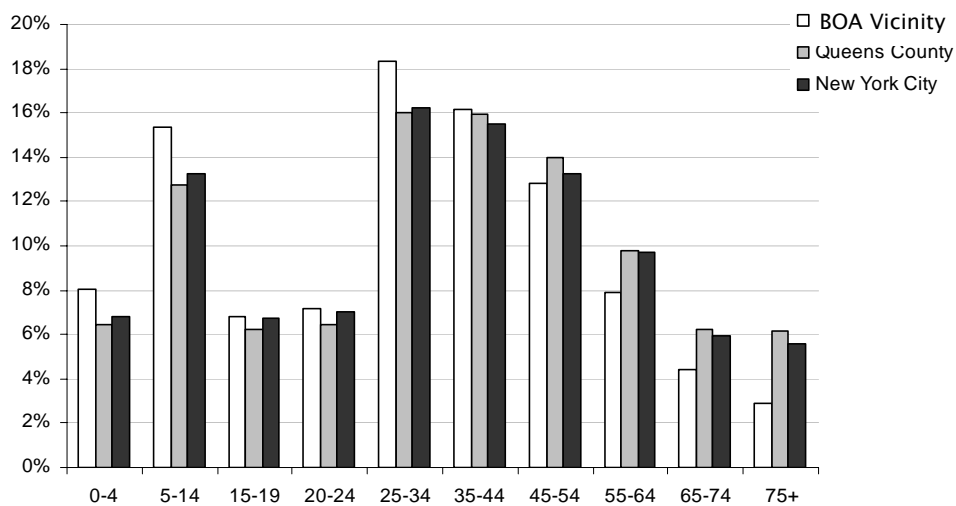


Source: ESRI Business Analyst, Economics Research Associates

## Age Distribution

A larger percentage of the population of the BOA Vicinity is below 35 years old, as compared to Queens and New York City, as shown in Figure 9. The BOA Vicinity benefits from the high proportion of younger residents (below age 35), a demographic that is an important source of retail spending.

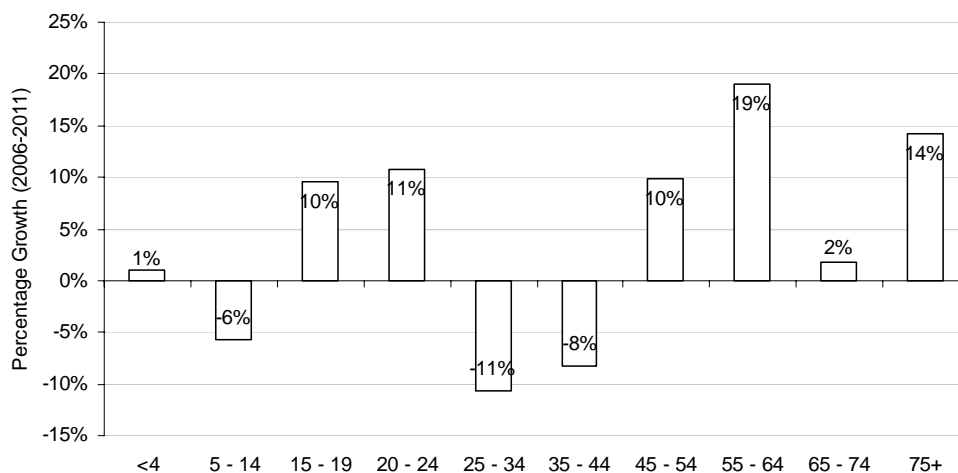
**Figure 9: Age Distribution in the BOA Vicinity, Queens, and NYC (2006)**



Source: ESRI Business Analyst, Economics Research Associates

Over the next five years, the young adult population (ages 15 to 24) in the BOA Vicinity is anticipated to grow by about ten percent, adding to the entry-level labor pool there. Projections also indicate significant growth in the number of residents over the age of 45, with the most dramatic growth (19 percent) anticipated for residents between the ages of 55 to 64, suggesting strong potential for active adult and senior housing. Figure 10 illustrates projected population changes in the BOA by age bracket between 2006 and 2011.

**Figure 10: Projected Age Distribution Change In the BOA Vicinity (2006–2011)**



Source: ESRI Business Analyst, Economics Research Associates

## V. Retail Market Analysis

### Overview

The BOA Vicinity has become one of the most vibrant and successful retail destinations in New York City. The retail epicenter of the BOA Vicinity, the Jamaica Avenue Business Improvement District (BID), runs along Jamaica Avenue from Sutphin Boulevard to 170<sup>th</sup> Street. This pedestrian-oriented retail district enjoys strong real estate market fundamentals – low vacancy rates (currently about three percent) and high retail rents (\$75 to \$90 per square foot).

The Jamaica Avenue BID is a regional destination for discount and hip hop urban clothing, and attracts shoppers from throughout the New York City region and other parts of the Northeast. On weekends, holidays, and during back-to-school season, the street swells with shoppers searching for bargains and the latest urban clothing. In January 2004, the New York Times reported that charter buses arrive regularly from far-reaching destinations including Rochester, Boston, Pittsburgh, and Buffalo with busloads of eager and curious shoppers.<sup>3</sup> The Jamaica Center Improvement Association estimated that 10,000 shoppers arrived in Jamaica via long-haul bus trip in 1994.

The character of retail offerings in the BOA Vicinity is expanding, as evidenced by the recent openings of several national and large-format retailers in the district. Within the past decade, Old Navy, Zales, the Gap, Children's Place, and Radio Shack have expanded their presence in Jamaica, while Home Depot recently opened in the area. The increasing presence of national retailers signals confidence in the retail market and an opportunity to create strategic retail niches.

While the Jamaica Avenue BID is a retail success story, there is still room for growth. Long-term plans for the neighborhood include creating stronger linkages between new retail around the AirTrain. New retail can also build upon existing retail clusters in the district.

### Methodology

The retail market study examined current market conditions in order to measure local demand and gauge the level of support for the scale and type of new retail that could be brought to the area. As part of the retail analysis, ERA reviewed current shopping patterns in and around the BOA Vicinity and studied the potential to capture unmet retail demand. ERA analyzed the local context for retail, in terms of what currently exists in the area and recent real estate trends related to retail.

ERA also conducted a retail demand analysis, measuring demand for various retail types against existing retail offerings, in order to determine how much and what types of new retail could be supported at the BOA Vicinity. ERA's retail model relies on estimates of consumer spending potential and existing retail sales to project retail potential by store type. For this study, ERA considered demand within three trade areas – the Primary and Secondary Trade Areas, comprised of residents closest to the site; and the Tertiary Trade

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<sup>3</sup> O'Grady, Jim. "So Many Stores, So Little Time", New York Times. January 11, 2004.

Area, which includes residents of more distant neighborhoods in Queens, who will also support retail within the BOA Vicinity, assuming the retail offerings are unique.

## Local Retail Context

### Retail Offerings within Five Miles of the BOA

ERA began its analysis of the local retail market by evaluating the existing supply of retail stores. In April 2007, there were 196 retail centers larger than 12,000 square feet located within five miles of the BOA. Collectively, these retail centers offer 10.9 million square feet of retail space. There are 22 retail centers that are between 100,000 and 500,000 square feet, comprising 11 percent of the retail stores and 44 percent of the retail space. Figure 11 illustrates the distribution in size of retail centers located within five miles of the BOA.

**Figure 11: Existing Retail Centers within five miles of the BOA (2007)**

Size (SF)	Number of Retail Centers	Rentable Building Area (SF)
500K-1M	1	963K
250K-500K	7	2.5M
100K-250K	15	2.3M
50K-100K	27	2.0M
12K-50K	146	3.2M
Total	196	10.9M

Source: CoStar Group; Economics Research Associates

Figure 12 presents the geographic distribution of the retail centers located within five miles of the BOA. The map illustrates several prominent retail zones within the five mile ring. There are marked concentrations of retail west of the Van Wyck Expressway, in Flushing, as well as in Jamaica. Queens Boulevard in Rego Park has a concentration of large-scale regional malls, including Queens Center and Queens Place Mall, which collectively offer 1.4 million square feet of retail space on Queens Boulevard. Other important retail sites in the area include the Shops at Atlas Park, a lifestyle center located four miles west of the BOA, which has been extremely successful since opening in 2006.

The location and composition of the ten largest retailers within five miles of the BOA are mapped in Figure 12. As shown, large-format national-brand retailers have a significant presence in Brooklyn and Queens. There is a concentration of these retailers west of the Van Wyck Expressway and a noticeable gap closer to the BOA and east of the Van Wyck.

**Figure 12: Retail Centers within five miles of the BOA (2007)**



## Retail Offerings within the BOA Vicinity

A retail inventory completed by GJDC in 2007 identified 663 retailers within the BOA. The majority (63 percent), were identified as Clothing/Clothing Accessories, Health and Personal Care, or Food Service and Drinking Places. The retail mix is characteristic of other regional shopping destinations in New York City, such as Fulton Mall in Brooklyn and the Hub in the Bronx, which offers a merchandise mix dominated by apparel and other fashion-oriented goods such as shoes, jewelry, and accessories; personal care stores (drug stores and pharmacies); and fast food. Figure 13 presents a summary of the retail inventory that categorizes the retail stores by store format.



**Figure 13: Retail Mix in the BOA Vicinity (2007)**

<b>Retail Category by NAICS</b>	<b>Number of Retailers</b>	<b>Distribution</b>
Building Material/Garden Equipment	14	2%
Clothing/Clothing Accessories	156	24%
Electronics and Appliance	39	6%
Food and Beverage	72	11%
Food Service and Drinking Places	121	18%
Furniture and Home Furnishings	37	6%
General Merchandise	53	8%
Health and Personal Care	142	21%
Miscellaneous	20	3%
<u>Sporting Goods, Hobby, Book, Music</u>	<u>9</u>	<u>1%</u>
<b>TOTAL</b>	<b>663</b>	<b>100%</b>

Source: GJDC; Economics Research Associates

## Retail Demand Analysis

### Methodology

This section presents ERA's analysis of the potential to develop additional retail space in the BOA Vicinity. ERA considers current spending patterns, the projected leakage of retail spending, and planned future retail development projects.

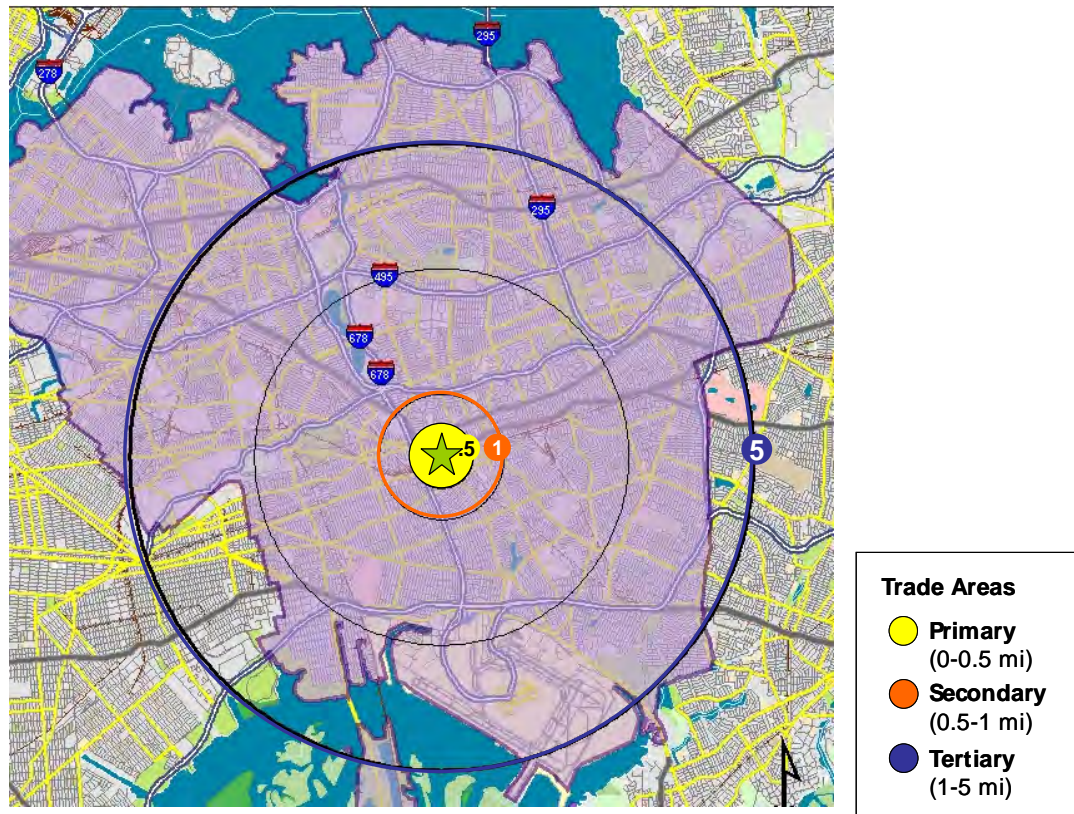
The primary analytical tool used for the retail market study is a gap analysis – which helps to quantify the opportunity for new retail in an area. The retail gap analysis begins by defining a Trade Area – the area from which the majority of retail sales will be generated. The demographic characteristics and consumer behavior of residents within the trade areas are then assessed in order to understand the expenditure potential of residents within the trade area.

The gap analysis compares projected expenditure potential with existing retail sales in the Trade Area. The gap analysis compares the demand for retail (measured by expenditure potential) to current retail sales. If expenditure potential exceeds sales, there is a spending leakage (i.e., residents are leaving the trade area to purchase goods and services). The estimate of sales leakage provides the basis for estimating unmet demand for retail goods and services within the Trade Area. ERA translates estimates of sales leakage into supportable square feet of retail space using the anticipated level of sales per square foot, by store type.

## Retail Trade Areas

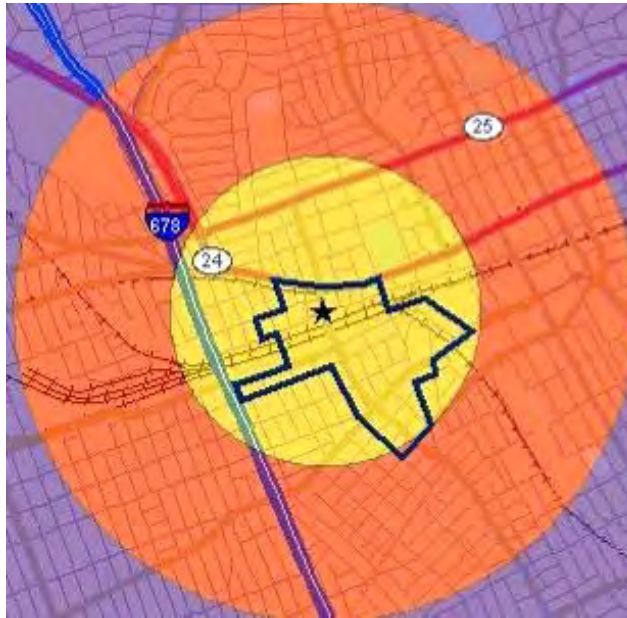
The Trade Area considered by this analysis is based on radii from the BOA. ERA subdivides the Trade Area into Primary, Secondary, and Tertiary Trade Areas. The boundaries of the Trade Area are shown in Figure 14.

**Figure 14: Retail Trade Areas**



The Primary Trade Area is comprised of residents living within the BOA Vicinity. Residents of the Primary Trade Area are within easy walking distance of the retail core of the area. The Secondary Trade Area is located between 0.5 and one mile from the center point of the BOA Vicinity. Residents of the Secondary Trade Area live between a 10- and 20-minute walk from the BOA. Figure 15 shows the Primary and Secondary Trade Areas in relation to the BOA.

**Figure 15: Primary and Secondary Trade Areas**



Source: ESRI; Economics Research Associates

The Tertiary Trade Area is located between one and five miles from the center point of the BOA Vicinity. The Tertiary Trade Area represents the largest trade area, both in area and population. However, residents of the Tertiary Trade Area are not within walking distance of the BOA and would need to drive or take public transportation to the BOA, and are likely to spend the majority of their retail dollars closer to home. Nonetheless, Tertiary Trade Area households will increase their spending in the BOA Vicinity if the retail offerings are compelling and unique.

### Trade Area Demographics

Retail spending potential is tied directly to the population and income levels within the Trade Area. This section examines demographic and socioeconomic trends within the Trade Area in order to establish a context for the retail gap analysis.

As shown in Figure 16, over 500,000 households comprise the potential consumer market for goods and services in the BOA Vicinity. As expected, the Tertiary Trade Area, which is the largest geographic area, is also the largest in terms of number of households.

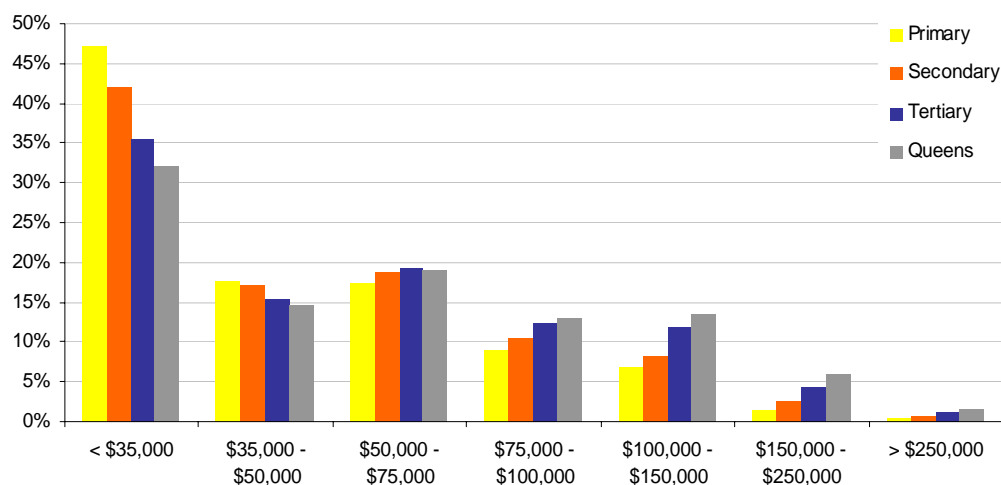
**Figure 16: Households within Project Trade Area (1990-2006)**

	1990	2000	2006
Primary (0 to 0.5 mi)	6,170	6,627	6,213
Secondary (0.5 to 1 mi)	21,823	23,765	23,228
Tertiary (1 to 5 mi)	465,786	510,675	503,475

Source: Claritas, Economics Research Associates

Figure 17 profiles current income levels within the Trade Area. As shown, the Primary Trade Area, which has the fewest households, has the highest proportion of households earning below \$35,000, while the Secondary and Tertiary Trade Areas have the largest percentage of high-income earners.

**Figure 17: Household Income Distribution within the Trade Area and Queens (2006)**



Source: Claritas, ESRI GIS, Economics Research

Figure 18 illustrates the average expenditure potential for households within each trade area. Households in the Primary Trade Area have the potential to spend \$21,000 annually on retail goods and services. Within the Secondary Trade Area, households have the potential to spend just over \$22,000 annually. Within the Tertiary Trade Area, each household has the potential to spend \$25,000 annually. Although income levels in the Primary and Secondary Trade Areas are lower, these households remain active and important consumers for the BOA Vicinity.

Households in all three trade areas spend roughly equivalent amounts on restaurants and drinking places, and as income levels rise, the amount spent per household on general retail rises accordingly.

**Figure 18: Household Expenditure Potential by Trade Area (2006)**

	Primary Trade Area	Secondary Trade Area	Tertiary Trade Area
General Retail	\$17,782	\$18,748	\$20,790
<u>Restaurant and Drinking Place</u>	<u>\$3,385</u>	<u>\$3,462</u>	<u>\$3,832</u>
<i>Total</i>	<i>\$21,167</i>	<i>\$22,209</i>	<i>\$24,622</i>

Source: Claritas, Economics Research Associates

## Retail Gap Analysis

The retail gap analysis measures potential consumer expenditures within the Trade Area against existing sales within the same area, to determine the potential for new retail there. Expenditure potential measures the projected total amount of money that could be spent on retail goods, based on current consumer spending patterns and population projections. Existing sales reflect the total sales of the retail stores that are located within each trade area. The difference between total potential expenditures and existing sales is the retail gap, which represents purchases that residents make outside the Trade Area. The retail gap is used to gauge demand for various retail types and to estimate the supportable square footage of new retail space within the Trade Area.

The retail gap, which can be negative or positive, indicates a leakage or an inflow of potential retail spending. Leakage (expenditure potential exceeding sales) indicates that potential spending dollars are flowing from the trade area to outside areas. Inflow (sales exceeding expenditure potential) indicates that retailers within the trade area are attracting consumers who reside outside of the Trade Area.

Retail businesses are grouped according to the categorization system of the North American Industry Classification System (NAICS). This retail gap analysis focuses on nine NAICS business categories that are classified as Retail Trade (NAICS Sectors 44-45) and Foodservice and Drinking Places (NAICS Sector 722). The selected retail categories represent the spectrum of store types with market potential in the Trade Area. ERA considers the following store categories:

- Furniture and Home Furnishing Stores;
- Electronics and Appliance Stores;
- Building Material and Garden Equipment Stores;

- Food and Beverage Stores;
- Health and Personal Care Stores;
- Clothing and Accessories Stores;
- Sporting Goods, Hobby, Book, and Music Stores;
- General Merchandise Stores;
- Miscellaneous Store Retailers; and
- Foodservice and Drinking Places.

ERA excludes Motor Vehicle and Parts Dealers, Gasoline Stations, and Non-Store Retailers from the analysis. For each of the included retail categories, ERA compares projected expenditure potential with existing retail sales in the Trade Area.

Figure 19 quantifies the retail expenditure potential, existing sales, and retail gap for each of the three trade areas. Within the Primary Trade Area, retail sales exceed local expenditure potential by nearly \$188 million. This signifies that BOA Vicinity is a shopping destination that attracts consumers from outside the Primary Trade Area. It is a destination for both general retail goods and food service and drinking places.

General Merchandise Stores; Health and Personal Care Stores; Building Material, Garden Equipment Stores; and Foodservice and Drinking Places generate the largest inflows of retail spending in the Primary Trade Area (i.e., retail sales above the spending potential of the resident population). According to the 2007 GJDC retail inventory, of the 663 stores in identified within the BOA Vicinity, 42 percent (281 stores) fall into one of the above classifications. Stores located in the Primary Trade Area that represent the retail categories responsible for the largest retail inflow (as shown in Figure 20) include the following:

- General Merchandise – The \$45 million inflow in General Merchandise stores can be attributed to the numerous discount retail stores in the BOA, including Cookies Department Store and Conway.
- Health and Personal Care – The \$41 million inflow in Health and Personal Care stores can be attributed to the numerous nail, hair, and beauty salons in the BOA.
- Building Materials – The \$28 million inflow in Building Material stores can be attributed to the three largest building material stores in the Primary Trade Area: L&B Building Supplies, Angelo's Home Center; and Barneys Hardware. The Home Depot, which recently opened, will further increase the inflow in the Building Material category, and will solidify the cluster of building material stores located within the BOA Vicinity.



- Foodservice and Drinking Places – The \$24 million inflow in Food Service and Drinking Places category can be attributed to the over seventy independent restaurants and bars in the BOA Vicinity.

Although the Clothing and Clothing Accessory category does not represent the largest inflow of retail spending, this retail store type is critically important to the retail market within the BOA. Discount clothing stores help define the retail character of the area and represent an important cluster within the Primary Trade Area. Discount clothing stores account for 24 percent of the retail sites within the BOA Vicinity and account for inflow of almost \$20 million in retail spending.

Within the Primary Trade Area, the only retail category with a leakage of retail spending potential is Miscellaneous Store Retailers, indicating that there is unmet demand for this store type from Primary Trade Area households. Florists, office supply stores, stationary stores, gift shops, novelty shops, souvenir stores, used merchandise stores, pet stores, art dealers, bicycle shops, and tobacco stores all fall into the Miscellaneous Store Retailer category.

**Figure 19: Retail Gap Analysis (2011, in '000s of 2006\$)**

Resident Trade Area	Expenditure Potential	Existing Sales	(Inflow) / Leakage
<b>Primary Trade Area (1/2 Mile Ring)</b>			
General Retail	\$110,481	\$293,864	(\$183,383)
<u>Restaurant and Drinking Place</u>	<u>\$21,033</u>	<u>\$25,477</u>	<u>(\$4,444)</u>
<i>Total</i>	<i>\$131,514</i>	<i>\$319,341</i>	<i>(\$187,827)</i>
<b>Secondary Trade Area (1 Mile Ring)</b>			
General Retail	\$435,473	\$372,920	\$62,553
<u>Restaurant and Drinking Place</u>	<u>\$80,406</u>	<u>\$35,712</u>	<u>\$44,694</u>
<i>Total</i>	<i>\$515,879</i>	<i>\$408,632</i>	<i>\$107,247</i>
<b>Tertiary Trade Area (5 Mile Ring)</b>			
General Retail	\$10,467,090	\$7,075,895	\$3,391,195
<u>Restaurant and Drinking Place</u>	<u>\$1,929,398</u>	<u>\$1,219,199</u>	<u>\$710,199</u>
<i>Total</i>	<i>\$12,396,488</i>	<i>\$8,295,094</i>	<i>\$4,101,394</i>

*All dollar values represent \$1000's*

Source: Claritas, Economics Research Associates

Figure 19 also indicates that there is a leakage of potential retail spending from the Secondary and Tertiary Trade Areas, suggesting that residents are leaving these trade areas in order to purchase some retail goods and services. It is reasonable to assume that much of the expenditure potential of residents in the Secondary Trade Area, and some of the expenditure potential of residents in the Tertiary Trade Area, is currently spent or could be spent within the BOA Vicinity. It is also reasonable to assume that if additional retail goods and



services were available in the BOA, a greater percentage of spending by Secondary and Tertiary Trade Area residents could occur in the BOA Vicinity.

Figure 20 provides an indication of merchandise categories that are experiencing the greatest amount of leakage from residents of the Secondary and Tertiary Trade Areas and, therefore, have the greatest potential in the BOA Vicinity.

**Figure 20: Retail Expenditure Potential In the Trade Area (2011, In '000s of 2006\$)**

Retail Category	Primary Trade Area	Secondary Trade Area	Tertiary Trade Area	Trade Area Total
General Retail				
General Merchandise Stores	(\$44,969)	\$45,713	\$1,673,266	\$1,674,010
Building Material, Garden Equip Stores	(\$28,317)	\$25,853	\$353,550	\$351,086
Food and Beverage Stores	(\$24,466)	\$40,693	\$812,797	\$829,024
Clothing and Clothing Accessories Stores	(\$19,799)	(\$28,868)	\$455,848	\$407,180
Health and Personal Care Stores	(\$40,856)	(\$25,034)	(\$596,089)	\$0
Electronics and Appliance Stores	(\$1,983)	\$2,515	\$87,768	\$88,300
Sporting Goods, Hobby, Book, Music Stores	(\$9,423)	(\$5,043)	\$124,710	\$110,244
Miscellaneous Store Retailers	\$163	\$9,987	\$274,312	\$284,461
Furniture and Home Furnishings Stores	(\$13,732)	(\$3,263)	\$205,034	\$188,038
Foodservice and Drinking Places	(\$4,444)	\$44,694	\$710,199	\$750,449
<b>Total</b>	<b>(\$187,827)</b>	<b>\$107,247</b>	<b>\$4,101,394</b>	<b>\$4,682,793</b>

Source: Claritas, Economics Research Associates

Note: All dollar values represent \$1000's

### Development Potential within the BOA Vicinity

Figure 21 aggregates the unmet spending potential within the Trade Area and estimates the level of supportable retail development. ERA relies on average sales productivity levels (i.e., sales per square foot) for each retail store type reported in the Urban Land Institute's publication *Dollars and Cents of Shopping Centers (2006)*. According to these estimates, the \$4.7 billion in leaked expenditure potential could support over 14 million square feet of new development within the Trade Area.

**Figure 21: Development Potential within the Trade Area (2011, 2006\$)**

Retail Category	Unmet Expenditure Potential <sup>1</sup>	Sales Productivity <sup>2</sup>	Retail Potential (Square Feet)
General Retail	\$ 3,932,343,000	\$309	12,706,000
Foodservice and Drinking Places	750,449,000	\$466	1,610,000
<b>Total</b>	<b>\$4,682,793,000</b>		<b>14,316,000</b>

Source: ULI Dollars & Cents of Shopping Centers; Economics Research Associates

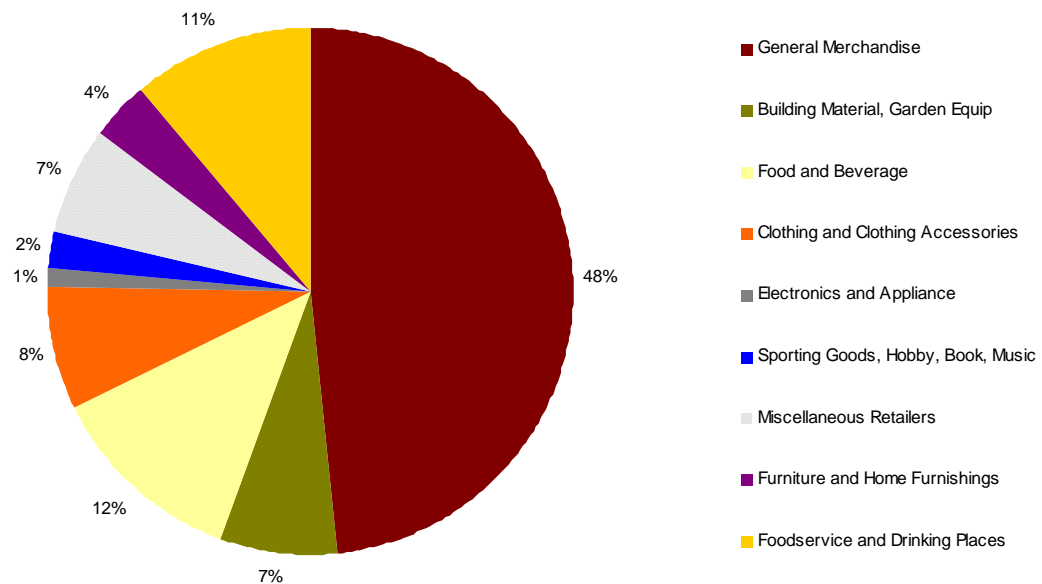
<sup>1</sup> Includes only those retail sub-categories for which positive unmet expenditure potential exists.

<sup>2</sup> Sales productivity is reported as gross revenue per square foot (2006\$). The figure presented here is the weighted average sales productivity for all retail categories.

Figure 22 illustrates development potential within the Trade Area by retail category, based on square footage. Of the 14.3 million square feet of supportable new development in the Trade Area, almost half of the supportable retail space is classified as General Merchandise.

dise. The defining characteristic of a General Merchandise store is the sale of a large variety of goods from a single location. This retail category is comprised primarily of large-format retailers, such as department stores, discount department stores, warehouse clubs, and super-centers. The retail gap analysis also suggests that the BOA Vicinity could support several other retail categories, which bodes well for a new multi-story main street retail and transit-oriented retail anchored by national tenants, and for clustered, ground-floor retail along major pedestrian and vehicular corridors.

**Figure 22: Development Potential by Retail Format (2011)**



Source: Economics Research Associates

## Key Retail Findings

- The BOA Vicinity is a retail destination that attracts residents from its surrounding neighborhoods, the New York Metropolitan region, and throughout the Northeast.
- The retail market in the BOA Vicinity is vibrant. The area enjoys strong market fundamentals, including low vacancy rates, high rents, and expanding retail offerings.
- Several important retail clusters are located in the BOA Vicinity and shape the character of this important shopping node. Dominant clusters include discount retail, discount apparel, personal care, and building materials. Future retail should build upon the retail clusters already present in the area.
- Demand within the Trade Area for new retail development is strong. Retail categories with largest unmet spending potential include general merchandise, food and beverage, restaurants and bars, and clothing and clothing accessories.
- Total retail spending potential within the Trade Area exceeds \$13 billion annually. Residents of the Primary Trade Area have the potential to spend \$132 million on retail goods and services; Secondary Trade Area residents have the potential to spend \$516 million on retail goods and services; and Tertiary Trade Area residents have the potential to spend \$12.4 billion on retail goods and services annually.
- Each year, nearly \$5 billion in retail expenditure potential is “leaked” to retail shops outside of the Trade Area. This unmet demand could support over 14 million square feet of new retail space. As one of the strongest retail nodes in the region, the BOA is a logical and viable area in which to develop new retail that satisfies unmet demand.
- Retail trends suggest that the BOA could support new multi-story main street retail, transit-oriented retail, and large-format national tenants, in addition to clustered retail along major pedestrian and vehicular corridors.

## VI. Residential Market Analysis

### Overview

To determine the market potential for new residential units in the BOA, ERA began by identifying sources of demand. Potential sources of demand include local households interested in expanding, downsizing, or moving into a new housing product; other Queens households that move within the borough; and households that move to Queens each year from outside the borough.

ERA's residential study considers the Greater Jamaica area, defined for the purpose of this analysis as Community District 12, as well as Queens as a whole. In addition to identifying potential markets, ERA examines several new residential development projects in the study area.

### Methodology

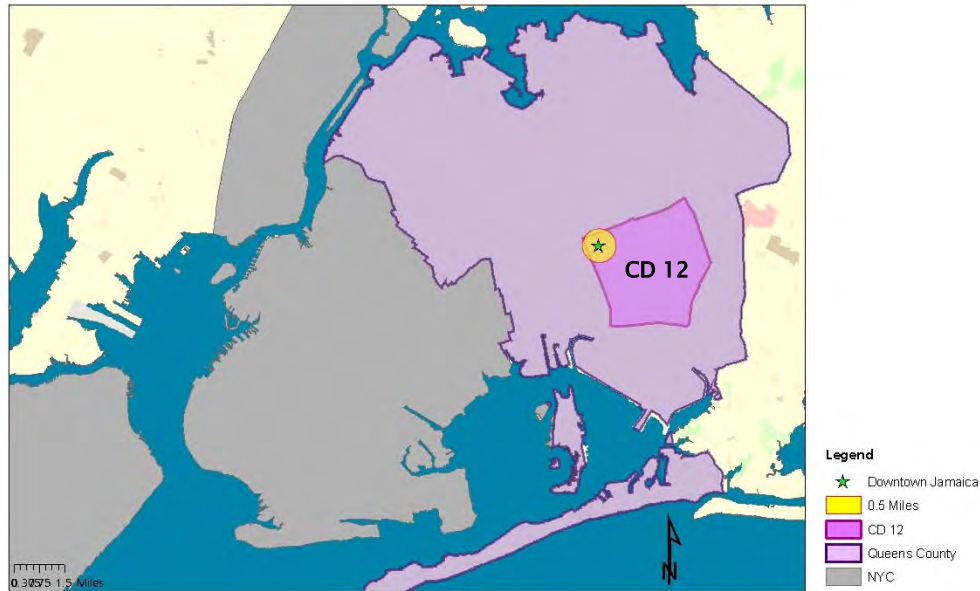
As part of the residential analysis, ERA performed the following tasks:

- Analyzed socioeconomic and demographic data for Community District 12 and Queens;
- Surveyed the existing condition of the residential market;
- Evaluated migration patterns to determine the origin of households moving to Queens County;
- Conducted a fair-share analysis to determine how many new residential units could be supported in CD 12;
- Reviewed current trends and patterns in residential development that could indicate additional demand for housing the BOA; and
- Collected information on residential development projects are planned, under construction, or recently completed.

## Study Area Context

Figure 23 illustrates the geographic areas considered by ERA's residential market analysis. The focus of the residential study is Community District 12.

**Figure 23: Residential Study Area**



Source: ESRI; New York City Department of City Planning; Economics Research Associates

The boundaries of Community District 12 (CD 12) are presented in Figure 24. The Van Wyck Expressway serves as a physical barrier to the west. CD 12 includes the neighborhoods of Jamaica, South Jamaica, Hollis, St. Albans, and Springfield Gardens. The BOA lies entirely within CD 12, in the area's northwestern quadrant.

**Figure 24: Map of Community District 12**



Source: New York City Department of City Planning

## Demographics

### Market Size

According to the US Census, CD 12 contained 223,602 persons and 70,225 households in 2000. The average household size was 3.13 persons. PlaNYC (Mayor Bloomberg's plan to enhance New York City by 2030) projects that the population of CD 12 will be approximately 233,100 in 2010, an increase of about four percent over 2000. The study estimates that the population will subsequently increase by roughly 10 percent, to 255,300, by 2030.

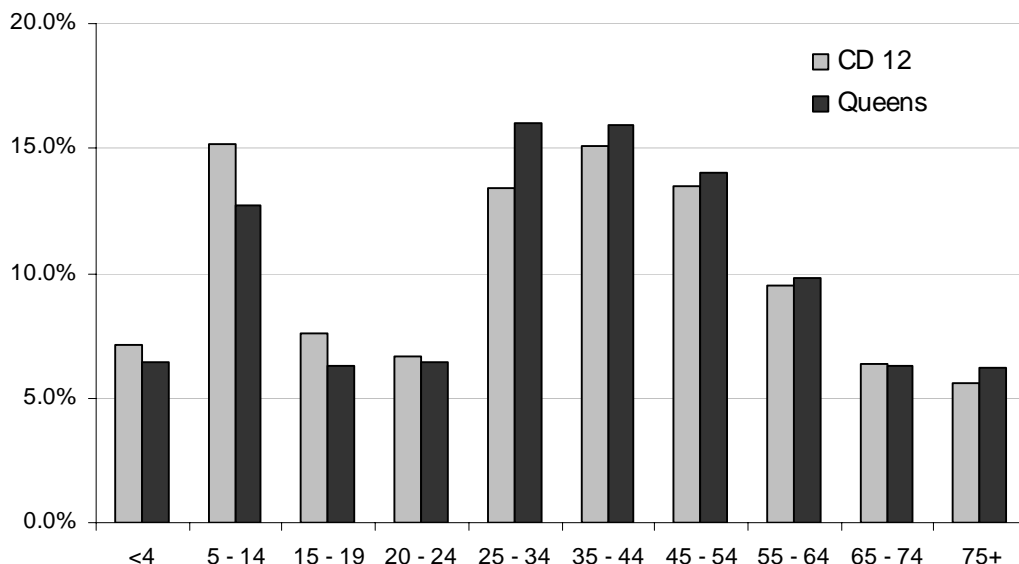
### Tenure (Home Ownership)

According to the New York City Housing and Vacancy Survey (NYCHVS), there was a 59 percent home-ownership rate in CD 12 in 2005, compared to the rate of 54 percent in Queens.

### Age Distribution

As compared with Queens, a greater share of the population of CD 12 is comprised of children and young adults ages 24 and younger. A smaller proportion of the population in CD 12 is over the age of 25.

**Figure 25: Age Distribution (2006)**

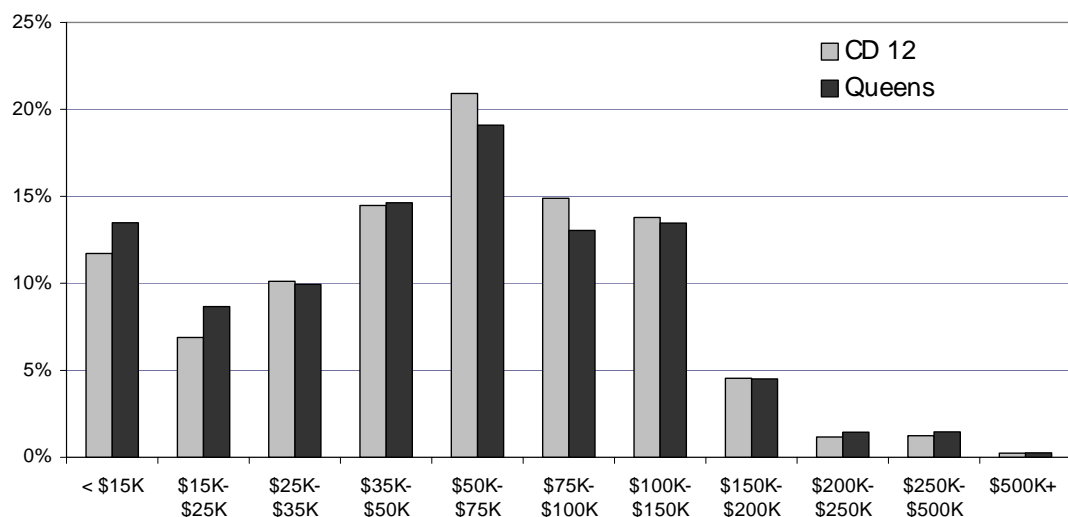


Source: ESRI Business Analyst; Economics Research Associates

### Income Distribution

Households in CD 12 are proportionally more concentrated in middle-income income brackets than households in Queens; 57 percent of households earned more than \$50,000 with the greatest percentage of households earning between \$50,000 and \$75,000. A lower percentage of CD 12 households earn less \$25,000 and more than \$200,000 annually, as compared with Queens overall.

**Figure 26: Household Income Distribution (2006)**



Source: ESRI Business Analyst; Economics Research Associates



## Existing Conditions

### Land Use and Zoning

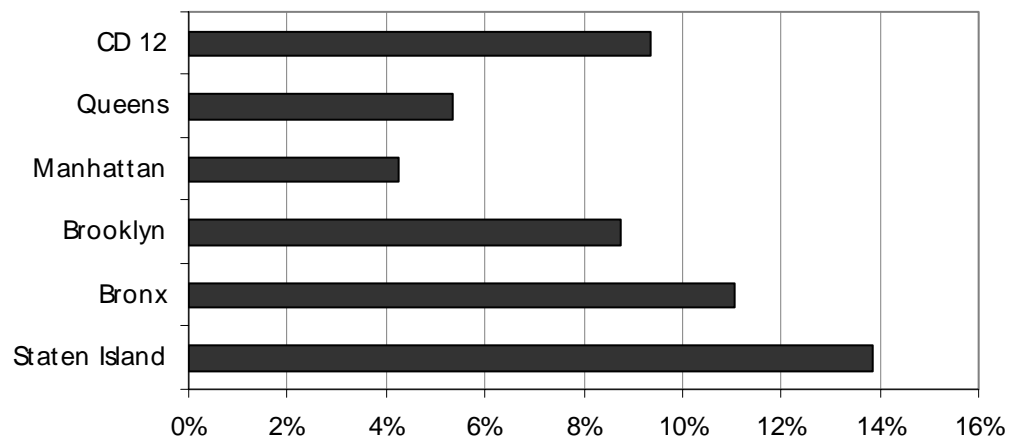
According to the New York City Department of City Planning, the predominant land use in CD 12 in 2005 was one- and two-family residential, with 84 percent of lots and 61 percent of total lot area devoted to this housing type. Multi-family residential represented 2.5 percent of lots and 7.2 percent of total lot area and Mixed Residential/Commercial represented three percent of lots and 1.7 percent of total lot area in the Community District.

The Department of City Planning has taken steps to change zoning within CD 12 to allow for more density at the transportation core and preserve neighborhood character in outlying areas. The proposed Jamaica rezoning, which seeks increased density in Downtown Jamaica, would primarily affect the northern-most portion of CD 12. The zoning change would allow for increased density along some of the major streets in the area, including Hillside Avenue, Jamaica Avenue, Merrick Boulevard, Guy Brewer Boulevard and Liberty Avenue. Specifically, the zoning change would allow for more multi-family residential and mixed-use (i.e., residential/commercial) projects. In addition, in 2005, the neighborhood of Springfield Gardens in the southeastern portion of CD 12 was re-zoned to lower residential density, limiting new development to one- and two-family detached and semi-detached residences. The proposed Jamaica rezoning, coupled with down-zoning in other parts of CD 12, would serve to channel new residential development toward the BOA by allowing the necessary density to absorb projected population growth.

### Changes in Housing Stock

The number of housing units in CD 12 increased at a relatively brisk pace between 1999 and 2005. As shown in Figure 27, the housing stock in CD 12 grew at a faster pace than Queens overall, Manhattan, and Brooklyn during this period.

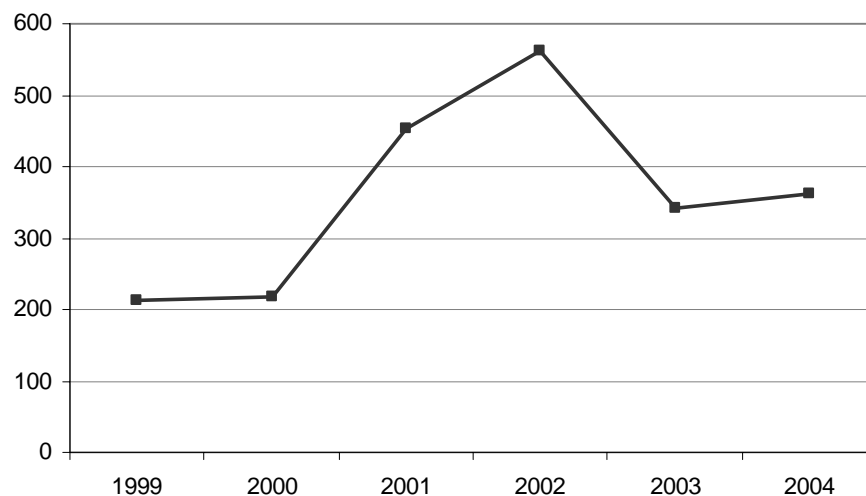
**Figure 27: Change In Housing Units (1999-2005)**



Source: New York City Housing and Vacancy Survey; Economics Research Associates

Figure 28 displays units authorized by residential building permits from 1999 to 2004 in Queens, according to the New York City Department of Buildings. The graph reveals a sharp decline in residential permits after 2002.

**Figure 28: Units authorized by Residential New Building Permits (1999-2004)**



Source: New York City Department of Buildings; Economics Research Associates

### Age of Housing Stock

Figure 30 compares the age of housing stock in Queens and CD 12. As shown, CD 12 is comprised of slightly newer housing. The share of housing that is less than 48 years old is about 36 percent in CD 12, versus 29 percent in Queens. However, in CD 12 and Queens, 26 percent and 29 percent of housing is 68 years or older, respectively. The large share of older housing indicates that there may be potential to offer new residential product to households living in outdated residential units.

**Figure 29: Age of Housing Stock (2005)**

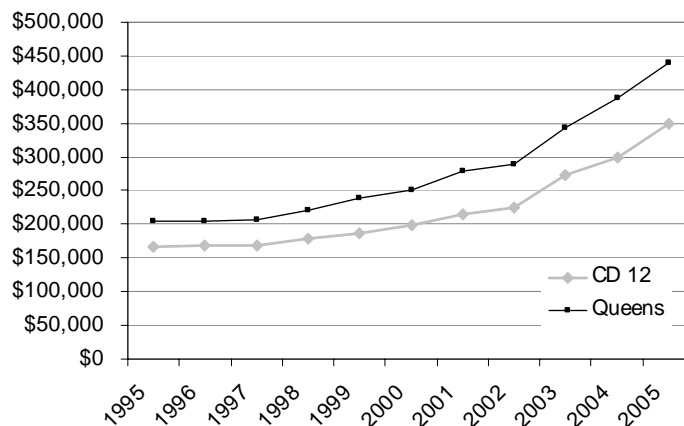
Age of Housing Stock	Queens	CD 12
Less than 27 years	6%	8%
28 to 47 years	23%	28%
48 to 67 years	41%	38%
68 years or older	29%	26%
<b>Total</b>	<b>100%</b>	<b>100%</b>

Source: New York City Housing and Vacancy Survey; Economics Research Associates

### Housing Prices

The median price for single family homes in CD 12 nearly doubled from 1995 to 2005, from \$167,000 to \$350,000, according to the New York City Department of Finance. As shown in Figure 30, housing prices in CD 12 have historically been lower than in Queens and the gap has widened over time. New York residential real estate appraisal firm Miller Samuel reported that the median sales price for residential property in Queens was \$492,900 in the first quarter of 2007. This represented a four percent increase from the first quarter of 2006, compared to the one percent increase experienced in Manhattan.

**Figure 30: Median Price for Single Family Home (1995-2005)**

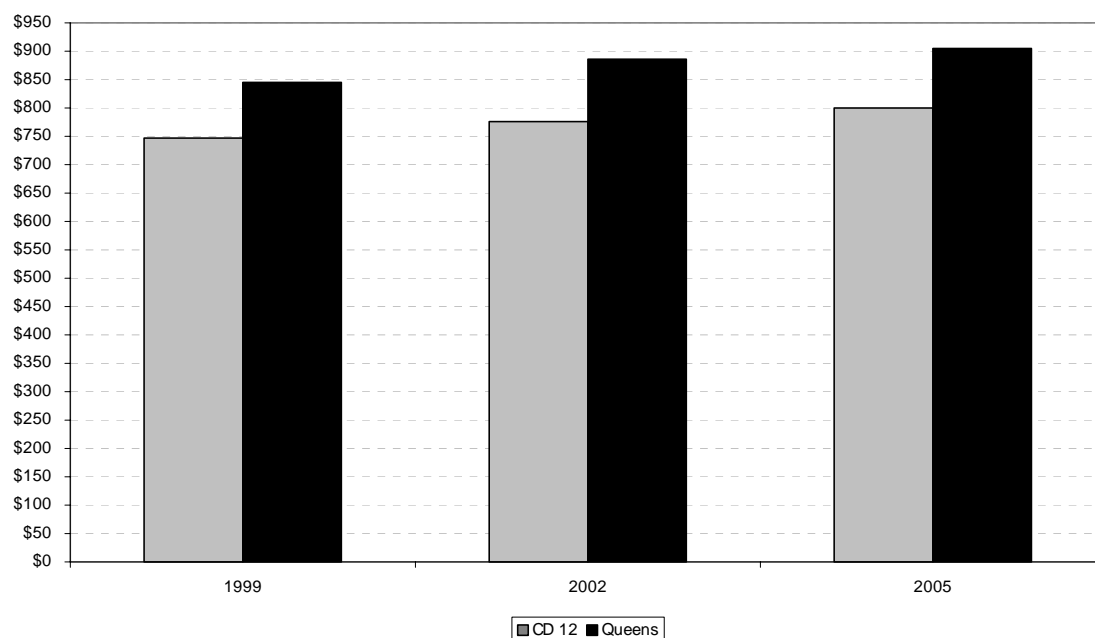


Source: New York City Department of Finance; Economics Research Associates

### Rents

Figure 31 shows the progression of median contract rents in CD 12 and Queens from 1999 to 2005, including subsidized units. Rents in CD 12 increased from below \$750 per month to \$800 per month during that period, yet were still lower than Queens as a whole where 2005 rents exceeded \$900 a month, making CD 12 attractive from a cost perspective. Excluding subsidized units, the 2005 median contract rent was \$850 per month in CD 12 and \$950 per month in Queens.

**Figure 31: Median Contract Rents In CD12 & Queens (1999 – 2005)**



Source: New York City Housing and Vacancy Survey; Economics Research Associates

Note: Includes subsidized units.

### Household Mobility

The U.S. Census Bureau's 2005 American Community Survey (ACS) provides data concerning household mobility in the borough of Queens, shown in Figure 32. While nearly ninety percent of households surveyed had not moved within the previous year, seven percent had moved within the county and four percent moved into the county. According to the ACS, the majority of households moving into Queens moved from somewhere in New York State.

**Figure 32: Queens Household Mobility (2005)**

Category	Percentage of Households
Same house 1 year ago	89.7%
Moved within same county	6.5%
Moved from different county or abroad	3.8%
<b>Total</b>	<b>100.0%</b>

Source: U.S. Census Bureau, American Community Survey, 2005

### Migration to Queens

ERA examined county-level migration patterns using information provided by the Internal Revenue Service (IRS). According to those data, 38,960 households moved into Queens during 2004. Nearly 80 percent of households migrating to Queens County came from the Tri-State region (i.e., New York, New Jersey, and Connecticut), with approximately 70 percent from other parts of New York State and 50 percent from within New York City. Brooklyn (27 percent), Manhattan (14 percent), and Nassau County (10 percent) were the top three counties of origin. With housing prices rising significantly in these three markets, the residents of these areas are an important target market for new residential development in CD 12. Figure 33 provides additional detail regarding in-migration to Queens in 2004.

**Figure 33: Migration to Queens (2004)**

<b>Source Markets</b>	<b>Percent of Total</b>
<b>Tri-State Area</b>	
<i>State of New York</i>	
Brooklyn	27%
Manhattan	14%
Bronx and Staten Island	8%
Long Island	15%
Northern Suburbs of NYC	3%
Other New York State Counties	2%
<i>Subtotal: State of New York</i>	<i>69%</i>
<i>State of New Jersey</i>	
Northern New Jersey	5%
Other New Jersey Counties	1%
<i>Subtotal: State of New Jersey</i>	<i>5%</i>
<i>State of Connecticut</i>	
South/West Connecticut	1%
Other Connecticut Counties	1%
<i>Subtotal: State of Connecticut</i>	<i>2%</i>
<b>Tri-State Subtotal</b>	<b>76%</b>
<b>Other Areas</b>	<b>24%</b>
<b>TOTAL IN-MIGRATION</b>	<b>100%</b>

Source: Internal Revenue Service; Economics Research Associates

## Projected Housing Demand

ERA relies on a fair-share analysis to determine the number of new residential units that could be absorbed in CD 12 annually. In 2005, approximately 10.3 percent of Queens households reported having moved within or to the borough during the previous year. Applying this proportion to the estimated 786,798 Queens households in 2006, ERA estimates that annual demand for housing is 81,265 units. This estimate of demand reflects the number of households that made housing decisions in 2006 (i.e., home purchases or rental leases).

ERA calculates the fair share of residential demand in CD 12 based on the proportion of Queens households located within the Community District, which is roughly nine percent. The fair share calculation indicates demand for roughly 7,300 units per year in CD 12, including both new and existing for-sale and rental product. However, in light of the issues discussed in previous sections – rezoning, infrastructure improvements, and new development – CD 12 could capture a greater share of housing demand than the fair share calculation suggests.

## Potential Markets

Consumers of new residential units in CD 12 would likely include existing area households interested in expanding, downsizing, or moving into new housing. Based on the experience of recent housing developments in Queens – including The Opal in Kew Gardens, where an estimated 80 percent of residents came from Queens – ERA surmises that the majority of demand for new housing in CD 12 would come from within the Community District, adjacent neighborhoods, and other parts of Queens. Additionally, households currently living outside of Queens could be attracted by Jamaica’s transit hub, which offers subway, bus, regional rail, airport, and highway access.

In addition to the households with children (which are well-represented in CD 12), ERA anticipates housing demand from households comprised of young professionals. National and regional trends indicate a movement by young professionals from expensive urban cores such as Manhattan to more affordable locations that are within walking distance of commuter transit lines and are near retail shops and services. This trend is apparent in cities such as White Plains, Jersey City, and Long Island City, where transit-oriented development has resulted in new for-sale and rental multifamily housing.

ERA also anticipates housing demand from households comprised of empty nesters. ERA examined the demographics in the CD 12 neighborhoods of Hollis and St. Albans. As shown in Figure 36, there are high homeownership rates and a significant share of households age 55 and older, which suggests potential for an “age-in-place” housing product tailored to empty nesters. This is consistent with national housing trends which indicate that aging baby boomers are selling their homes and downsizing to apartments within the same or nearby communities.



**Figure 34: Empty Nester Market Comparison**

	CD12	Hollis	St. Albans
Owner-Occupied Share	62%	73%	80%
55+ Households with Income \$50K+	21%	25%	30%

Source: ESRI

Given the range of potential target consumers, ERA anticipates sufficient demand to develop residential project at a wide range of price points that satisfies a diversity of housing needs. Several recent and planned residential development projects have supported this model.

## Residential Development Projects

This section describes several development projects underway or planned for within and near CD 12, as listed in Figure 35. As shown Figure 36, one project has been completed and four projects are planned (in bold) within the BOA Vicinity. It is anticipated that identified pipeline projects will add 692 units in the next two or three years.

**Figure 35: Selected Residential Development Projects**

Project	Developer	Units	Type	Status
Yorkside Towers	The Ciampa Organization	180	Market-rate rental	Completed
Briarwood Terrace	Jackson Realty Development	35	Market-rate condominium	Under Construction
Jamaica Estates Windsor	New City Builders	24	Market-rate condominium	Under Construction
Merrick Blvd Apartments	Allen AME Housing Corp.	58	Affordable rental	Planned
Queens Family Courthouse	The Dermot Company	350	Affordable coops; Affordable & Market-rate	Planned
Parsons-Windsor Condominium	New City Builders	58	Market-rate condominium	Planned
161st Street Mid-Block	Bluestone Organization	87	Affordable & Market-rate coops;	Planned
88-34 161st Street	84-34 161st Street Property, LLC	80	Unkown	Planned
<b>Total</b>		<b>872</b>		

Source: Economics Research Associates

**Figure 36: Map of Residential Development Projects**



Source: ESRI; Economics Research Associates

## Selected Residential Development Project Profiles

### ***Yorkside Towers – The Ciampa Organization***

Yorkside Towers, a 180-unit rental property located on 161<sup>st</sup> Street north of Jamaica Avenue, was completed in 2005. Yorkside was the first multi-family project built in the BOA Vicinity in over 30 years. It consists of two 90-unit buildings connected by a private courtyard in the back, with commercial space on the ground floors. Developed by The Ciampa Organization, the project was financed by the New York City Housing Development Corporation (HDC) as part of their New Housing Opportunities Program (New HOP) to meet middle-income housing needs. New HOP subsidizes housing development for households earning up to 175 percent of Area Median Income (AMI). Yorkside apartments include studios, one-bedroom, and two-bedroom apartments with average rents ranging from approximately \$1,000 per month for studios to \$1,600 for two-bedroom apartments.

**Figure 37: Yorkside Towers**



### ***Queens Family Courthouse – The Dermot Company***

In 2005, the Dermot Company was selected by the New York City Economic Development Corporation (EDC) to acquire and develop the two-acre site of the former Queens Family Courthouse at 89th Avenue and Parsons Boulevard. Dermot will restore the four-story Italian Renaissance-style façade of the courthouse building, retaining some interior spaces, and incorporate a modern addition that will contain roughly 350 housing units.

The unit mix will be 30 percent studios, 50 percent one-bedrooms, and 20 percent two-bedrooms. The buildings will be comprised of 20 percent for-sale units and 80 percent rental units. The developer will use HDC financing to offer the for-sale units as middle-income cooperative apartments for households earning up to 175 percent of AMI. Of the rental units, 40 percent will be market-rate, 40 percent will be middle-income (below 130 percent of AMI), and 20 percent will be low-income (below 40 percent and 50 percent of AMI). The project will also include retail, parking, and space for community and cultural uses. Construction is scheduled to begin in summer 2007 for completion in 2009.

**Figure 38: Queens Family Courthouse**



***161<sup>st</sup> Street Mid-Block Buildings – Bluestone Organization***

A Queens-based developer, the Bluestone Organization, is planning to build two residential buildings fronting 161<sup>st</sup> Street north of Jamaica Avenue. In total, these buildings will contain 87 residential units. One building will provide 28 middle-income rental apartments, including one- and two-bedroom units. The other will offer 59 affordable co-ops and market-rate condominiums with roof terraces, including two- and three-bedroom units. The residential buildings will be joined by a commercial building fronting 160<sup>th</sup> Street, with office space and ground-floor retail. Construction of the residential buildings is contingent on rezoning.

**Summary of Findings from Selected Development Project Profiles**

The examples of current development projects provide an observable gauge on developer interest in CD 12. Clearly, there are developers who recognize the market potential of the area. Importantly, developers are responding to market demand with mixed-tenure and mixed-income products that provide market-rate and affordable housing options. Apartment sizes serve a variety of needs, ranging from studios to three-bedrooms.

## Key Residential Findings

- CD 12 has a relatively high rate of homeownership and greater proportions of school-age residents and middle-income households, as compared with Queens. New residential development within the BOA should provide a mix of homeownership and rental opportunities available to the range of people that are likely to live in or relocate to the area, including households with children.
- The median price for single family homes in CD 12 nearly doubled from 1995 to 2005. Rising prices are attracting developers to the area. At the same time, prices and rents are lower than Queens as a whole, making Jamaica an affordable alternative to other areas of Queens.
- CD 12 is largely comprised of one- and two-family residential properties. The proposed rezoning of Jamaica will increase density in the area proximate to Jamaica's transportation infrastructure. Other neighborhoods have been down-zoned to preserve low density. These zoning changes are likely to channel new development toward the BOA, which includes Jamaica's transportation center.
- The number of housing units in CD 12 increased at a relatively brisk pace between 1999 and 2005, with greater growth (in percentage terms) than Queens overall, Manhattan, and Brooklyn during this period. IRS data indicating that of the nearly 39,000 households that moved into Queens in 2004, the greatest percentages came from Brooklyn, Manhattan, and Nassau County. With housing prices rising significantly in these three markets, the residents of these areas are an important target market for new residential development in CD 12.
- Roughly 30 percent of residences are approximately 70 years old or older. As housing ages, consumers are likely to seek new housing alternatives.
- The rental vacancy rate in CD 12 was 2.7 percent in 2005. While this represented an increase from 2002, the increase was moderate relative to other neighborhoods in Queens, an indication of stability in the rental market.
- ERA conducted a fair-share analysis to determine the number of new residential units that could be absorbed in CD 12 annually. The analysis indicated demand for roughly 7,300 units per year, including both new and existing product. In light of various changes in the area – rezoning, infrastructure improvements, and new development – CD 12 could capture a greater share of housing demand in the future.
- New projects are being built to respond to demand. Known projects in various stages of planning and construction will add 692 units in the next two to three years. Planned development includes mixed-use, mixed-income, and mixed-tenure projects.

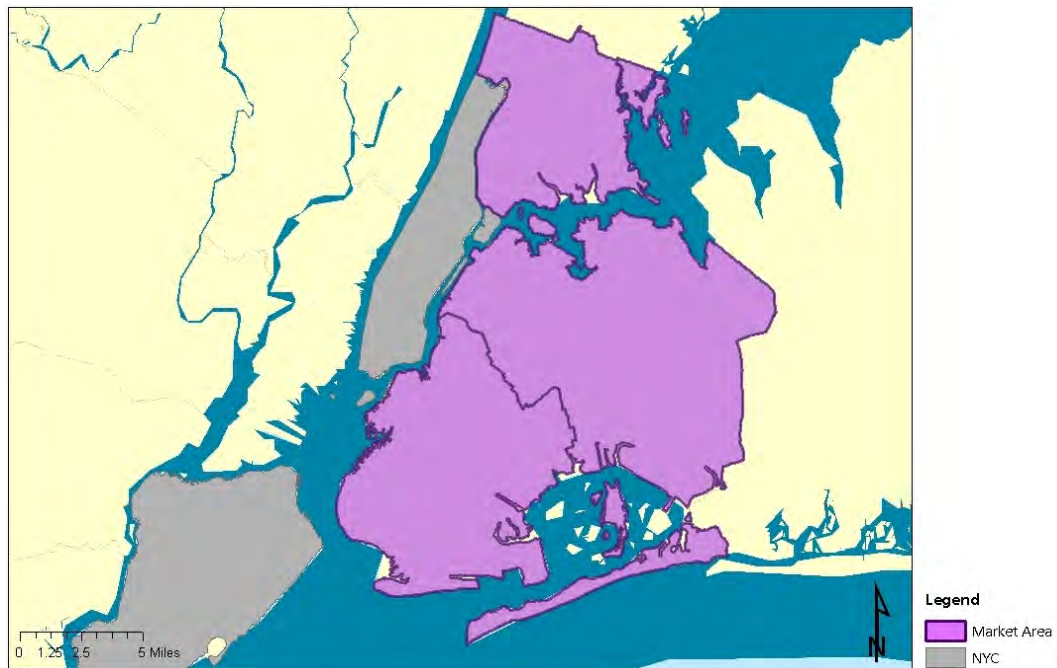


## VII. Office Market Analysis

### Overview and Methodology

This section provides analysis of the market for commercial office space in Queens and the Jamaica Office Submarket Area.<sup>4</sup> To evaluate the potential for office development, ERA provides a qualitative assessment of market demand that considers the potential for build-to-suit tenants who would pre-lease space. In addition, the analysis relies on occupational employment projections to quantify job growth and associated demand for new office space. ERA also analyzes office market trends in Queens, Brooklyn, and the Bronx (referred to as the QBB Office Market Area) as well as the Jamaica Submarket Area to evaluate potential demand for office space in the future. Figure 39 presents a map of the QBB Office Market Area.

**Figure 39: Market Area for Office and Industrial Markets**



*Source: ESRI; Economics Research Associates*

<sup>4</sup> The Jamaica Office Submarket Area is defined as those Queens zip codes encompassed by a five-mile ring centered at the intersection of Archer Avenue and Sutphin Boulevard.

## Qualitative Factors Influencing Development Potential

There are a number of factors that support the notion that the Jamaica Office Submarket Area has the potential to support significant new office development in the future:

- Superior access to the New York City subway and bus system, the Long Island Railroad, and Kennedy Airport;
- Proximity to a diverse workforce;
- Increasingly high lease rates and low vacancy rates in Manhattan; and
- Zoning changes in Jamaica.

Despite the potential for development in the Jamaica Office Submarket Area, it is unlikely though that the BOA will undergo an office development boom in the near future without public-sector intervention. Disparate property ownership in the area is a significant issue as larger parcels are needed to construct competitive and efficient large-floorplate office buildings. Assembling shovel-ready sites for development will increase the attractiveness of the BOA to potential developers. In addition, as seen in most office markets in New York City, developers are unlikely to build office space on speculation. However, a targeted campaign to attract businesses seeking build-to-suit sites for office space could stimulate demand for office space in the BOA. Potential tenants include:

- Regional firms looking for new space (wired, large, and amenitized spaces are desired);
- Airlines, airline vendors, logistics companies;
- Health care and related supporting services;
- Community groups (not-for-profit organizations);
- Manhattan firms looking for economical back office with proximity to transportation; and
- Firms with employees living in nearby areas (Queens and Nassau Counties).

Examination of current office development projects and proposals in Queens provides useful data to inform the development strategy for the BOA. The following office projects generally support the concept of larger office spaces with a predetermined tenant:

- A ground lease was recently signed with JFK Center Associates to develop a 900,000 square foot building on Sutphin Boulevard of which approximately 550,000 is in negotiation for merchandise mart use.
- Court Square Place (completed 2006) in Long Island City is a 16-story, 275,000-square-foot building owned, operated, and partially occupied by the United Nations Federal Credit Union.
- Citigroup is constructing a 15-story, 528,000-square-foot office tower in Long Island City. When completed, Citigroup will occupy two million square feet in Long Island City.



- The Pistilli Realty Group is constructing a 10-story, 70,000-square-foot office building in Astoria, to be anchored by a local government agency.

In addition, mixed-use projects offer an opportunity to develop smaller Class A office spaces. For example, the Bluestone Organization is planning 20,000 square feet of office space in a four-story building with retail on the ground level, to be located on 160<sup>th</sup> Street in Jamaica. Bluestone will occupy half of the office space. Also, the Pistilli Realty Group has discussed converting the historic Jamaica Savings Bank to office space.

## Employment Trends

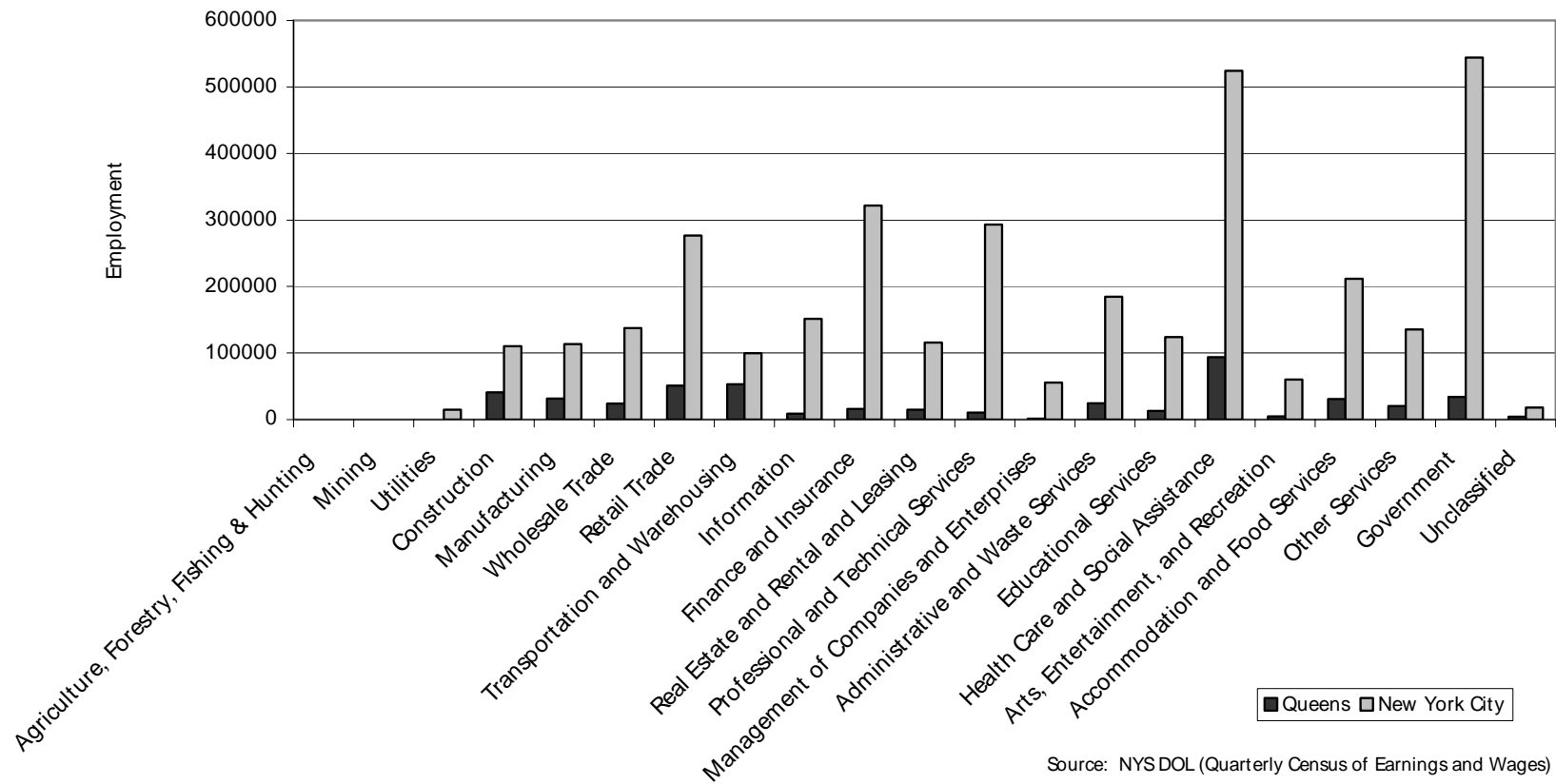
The job base in Queens represents a relatively small share of employment in New York City. Data from the New York State Department of Labor indicates that approximately 14 percent of New York City jobs were based in Queens County in 2005. Figure 40 presents employment by industry in Queens and New York City.

Industry sectors driving the market for office space include education and health services, professional business services, finance, and information. Figure 41 presents job growth in Queens by industry sector for the period 1990 through 2005.

Figure 42 highlights employment trends that influenced the market for office space in Queens, including the following:

- The Education and health services sector has grown steadily since 1990;
- The professional and technical services industry expanded in the late 1990s but has not increased employment since then;
- The financial services industry shed jobs in the late 1990s but has added jobs in recent years; and
- The information industry has added a small number of jobs since 1990.

**Figure 40: Employment by Industry In Queens County and New York City (2005)**

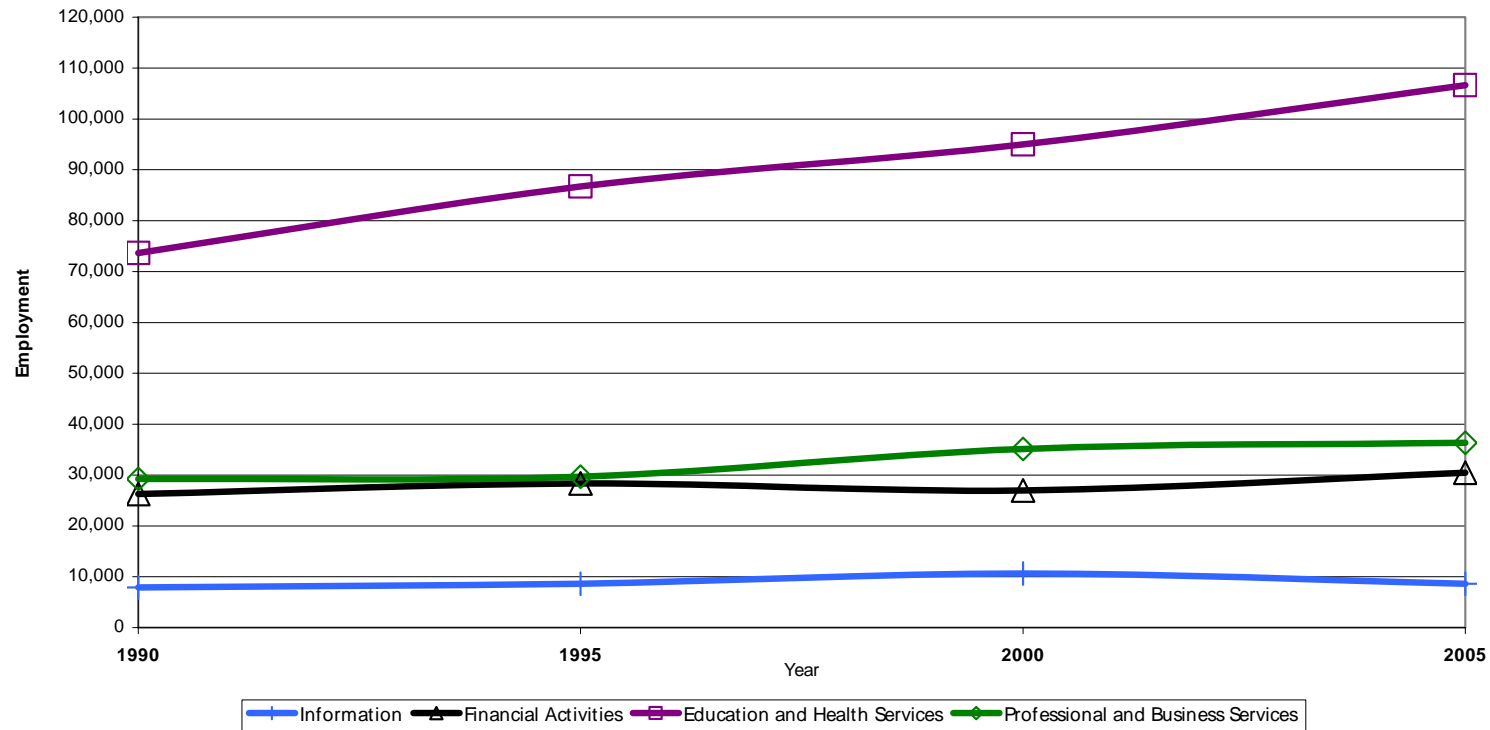


**Figure 41: Historical Employment In Queens County (1990–2005)**

	Employment				Employment Growth			
	1990	1995	2000	2005	1990-2005		2000-2005	
					Cum.	Annualized	Cum.	Annualized
<i>Total Employment</i>	462,031	442,513	479,969	478,739	3.6%	0.2%	-0.3%	-0.1%
<i>Total Government Employment</i>	33,643	33,962	30,906	34,194	1.6%	0.1%	10.6%	2.0%
<i>Total Private Employment</i>	428,388	408,551	449,062	444,546	3.8%	0.2%	-1.0%	-0.2%
<b>Private Sector Breakdown by Industry Group</b>								
Natural Resources and Mining	0	0	0	33	-	-	-	-
Construction	36,822	29,081	39,806	40,626	10.3%	0.7%	2.1%	0.4%
Manufacturing	0	0	46,504	31,764	-	-	-31.7%	-7.3%
Trade, Transportation, and Utilities	146,863	129,778	141,533	130,164	-11.4%	-0.8%	-8.0%	-1.7%
Information	7,869	8,661	10,659	8,647	9.9%	0.6%	-18.9%	-4.1%
Financial Activities	26,286	28,342	26,960	30,477	15.9%	1.0%	13.0%	2.5%
Professional and Business Services	29,238	29,690	35,115	36,353	24.3%	1.5%	3.5%	0.7%
Education and Health Services	73,665	86,713	95,016	106,629	44.7%	2.5%	12.2%	2.3%
Leisure and Hospitality	29,274	27,556	30,695	35,080	19.8%	1.2%	14.3%	2.7%
Other Services	18,394	17,827	21,044	20,294	10.3%	0.7%	-3.6%	-0.7%
Unclassified	0	0	0	4,482	-	-	-	-

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages; Economics Research Associates

**Figure 42: Office-Using Industry Trends In Queens County (1990–2005)**



Source: Bureau of Labor Statistics, Quarterly Census of Earnings and Wages; Economics Research Associates

## Employment-Based Estimate of Demand for Office Space

To generate an estimate of future demand for office space in Queens, ERA relies on occupational employment projections provided by the New York State Department of Labor. ERA allocates projected annual employment growth in New York City to Queens County using the County's current share of New York City employment, by industry sector. ERA then identifies the projected number of new office-using jobs in Queens and estimates the amount of office space that would be required by those jobs. To estimate demand in the Jamaica Office Submarket Area, ERA applies a fair-share capture rate to the estimate of supportable office space in Queens.

Figure 43 presents annual office-using employment growth and annual demand for new office space within Queens County. As shown, ERA expects annual employment growth in office-using occupations will be about 1,800 per year in Queens. Assuming 250 square feet per office employee, ERA estimates annual demand for approximately 450,000 square feet of office space within the Borough.

Approximately 42 percent of Queens County office space is in the Jamaica Office Submarket Area. To estimate demand for office space, ERA assumes that this proportion (i.e., the fair share) of future office product deliveries in Queens will occur in the Jamaica Office Submarket Area. Based on employment projections and the Submarket's fair-share capture of office space, ERA estimates that the Jamaica Office Submarket Area will attract demand for roughly 950,000 square feet of office over the next five years.

**Figure 43: Projected Annual Employment Growth and Demand for New Office Space In Queens County (2007-2014)**

Occupation	Projected Office-Using Employment	Demand for Office Space <sup>1</sup>
Management Occupations	105	26,000
Business and Financial Operations Occupations	205	51,000
Computer and Mathematical Occupations	148	37,000
Architecture and Engineering Occupations	30	7,000
Life, Physical, and Social Science Occupations	8	2,000
Community and Social Services Occupations	336	84,000
Legal Occupations	54	13,000
Arts, Design, Entertainment, Sports, and Media Occupations	74	19,000
Healthcare Practitioners and Technical Occupations	231	58,000
Healthcare Support Occupations	222	56,000
Protective Service Occupations	8	2,000
Sales and Related Occupations	254	64,000
<u>Construction and Extraction Occupations</u>	<u>141</u>	<u>35,000</u>
<b>Total, All Occupations</b>	<b>1,816</b>	<b>454,000</b>

Source: New York State Department of Labor; Economics Research Associates

<sup>1</sup> Assumes 250 square feet per employee.

## Office Market Trends

In the QBB Office Market Area, the office vacancy rate was 8.7 percent as of the fourth quarter of 2006. There is currently about 50 million square feet of office space, of which roughly 4.4 million square feet of space is vacant.

**Figure 44: QBB Office Market Area Overview (Fourth Quarter 2006)**

Market/Submarket	Existing Square Feet	Number of Buildings	Vacancy (Square Feet)	Vacancy Rate
Queens	20,907,068	637	1,404,796	6.7%
Bronx	5,581,129	207	530,615	9.5%
Brooklyn	23,956,280	560	2,443,571	10.2%
<b>Total</b>	<b>50,444,477</b>	<b>1,404</b>	<b>4,378,982</b>	<b>8.7%</b>

Source: CoStar Group; Economics Research Associates

Over the past nine years, the QBB Office Market Area has added about 4.9 million square feet of office space. Net absorption of office space has been uneven with significant net absorption occurring in 1997, 1999, 2003, 2004, and 2005. There was significant negative net absorption in 2002. Vacancy has ranged from about 2.1 million square feet in 1997 to almost 5.2 million square feet in 2003. Figure 45 presents detailed market data covering the period from 1997 through 2006.

Figure 46 illustrates trends in office space inventory, absorption, and vacancy in the QBB Office Market Area from 2002 through 2006. During this period, the office vacancy rate peaked in 2003 at 10.5 percent. Vacancy rates declined in 2004 and 2005 due to net absorption in excess of new deliveries. The vacancy rate reached a low point of 8.2 percent in 2005 then increased to 8.7 percent in 2006, as office product deliveries increased and net absorption dropped off.

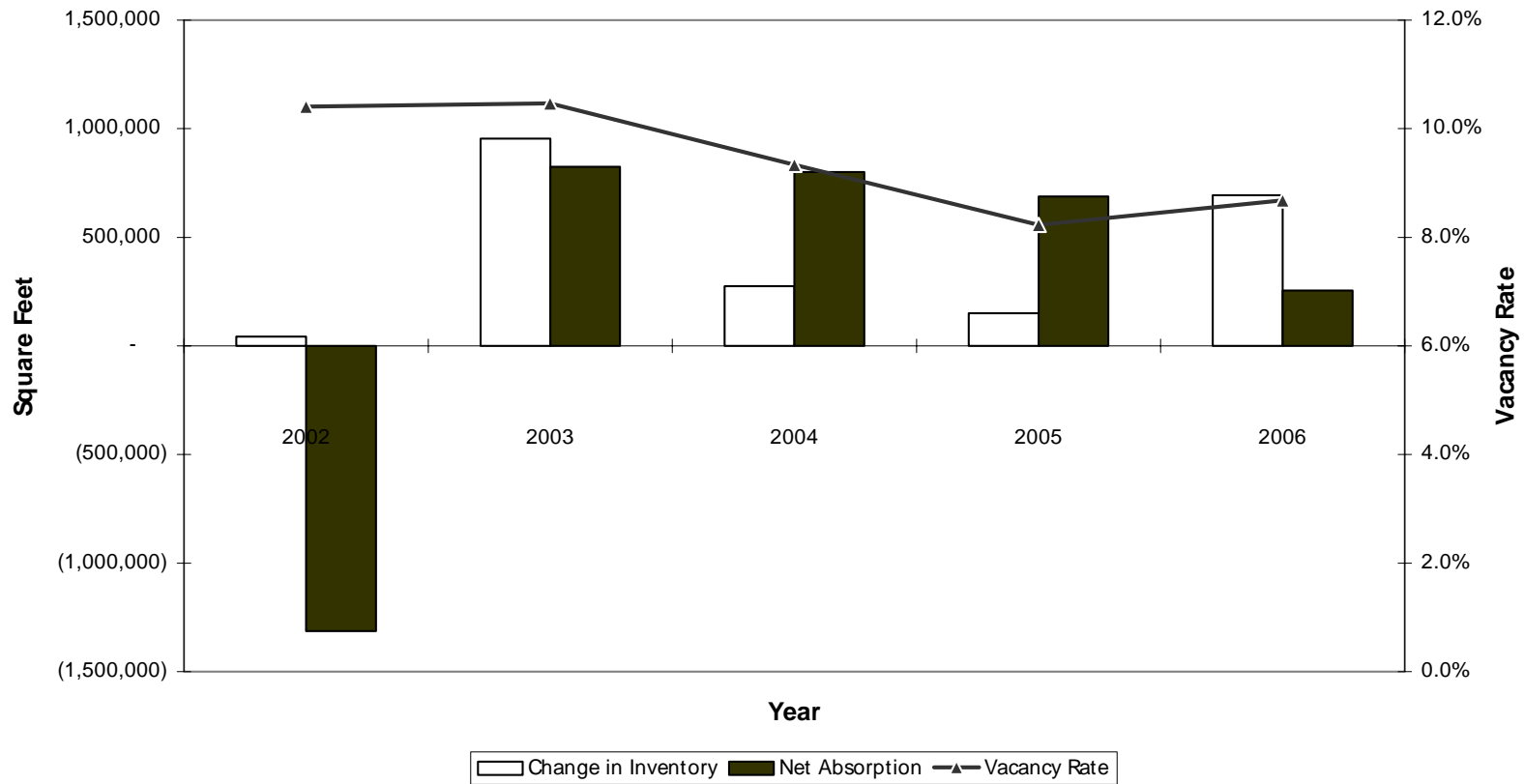


**Figure 45: QBB Office Market Area Trends (1997-2006)**

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
<b>Inventory</b>										
Buildings	1,329	1,334	1,345	1,354	1,361	1,365	1,370	1,379	1,388	1,404
Square Feet	46,543,765	47,674,240	47,840,760	48,106,902	48,328,795	48,371,815	49,326,296	49,601,073	49,751,575	50,444,477
Change in Inventory		1,130,475	166,520	266,142	221,893	43,020	954,481	274,777	150,502	692,902
<b>Vacancy</b>										
Square Feet	2,127,648	3,631,274	3,065,373	3,545,945	3,677,306	5,033,326	5,162,242	4,630,854	4,093,268	4,378,982
Vacancy Rate	4.6%	7.6%	6.4%	7.4%	7.6%	10.4%	10.5%	9.3%	8.2%	8.7%
<b>Net Absorption</b>	519,390	(373,151)	732,421	(214,430)	90,532	(1,313,000)	825,565	800,307	688,088	255,536

Source: CoStar Group; Economics Research Associates

**Figure 46: QBB Office Market Area Inventory, Absorption, and Vacancy (2002–2006)**



*Source: CoStar Group; Economics Research Associates*

The QBB Office Market Area absorbed an average of roughly 2.9 million square feet of office space annually 2002 through 2006, with Queens representing approximately 1.1 million square feet on average. In Figure 47, ERA presents the average gross absorption of office products located in the QBB Office Market Area over the last five years.

**Figure 47: QBB Office Market Area Gross Absorption (2002-2006)**

<b>Market/Submarket</b>	<b>Average Annual Gross Absorption (2002-2006)</b>	<b>Annual Gross Absorption (2006)</b>
Queens	1,112,267	1,087,346
Bronx	361,800	314,924
<u>Brooklyn</u>	<u>1,382,054</u>	<u>1,016,115</u>
<b>Total</b>	<b>2,856,121</b>	<b>2,418,385</b>

Source: CoStar Group; Economics Research Associates

### Jamaica Office Submarket Area Trends

The Jamaica Office Submarket Area contains approximately 352 buildings with roughly 8.9 million square feet of space. There are approximately 471,000 square feet of vacant office space in the Submarket, about five percent of the office inventory. As shown in Figure 48, CoStar reports that about 329,000 square feet of office space was added to the Jamaica Office Submarket Area (net of demolitions) between 1997 and 2006.

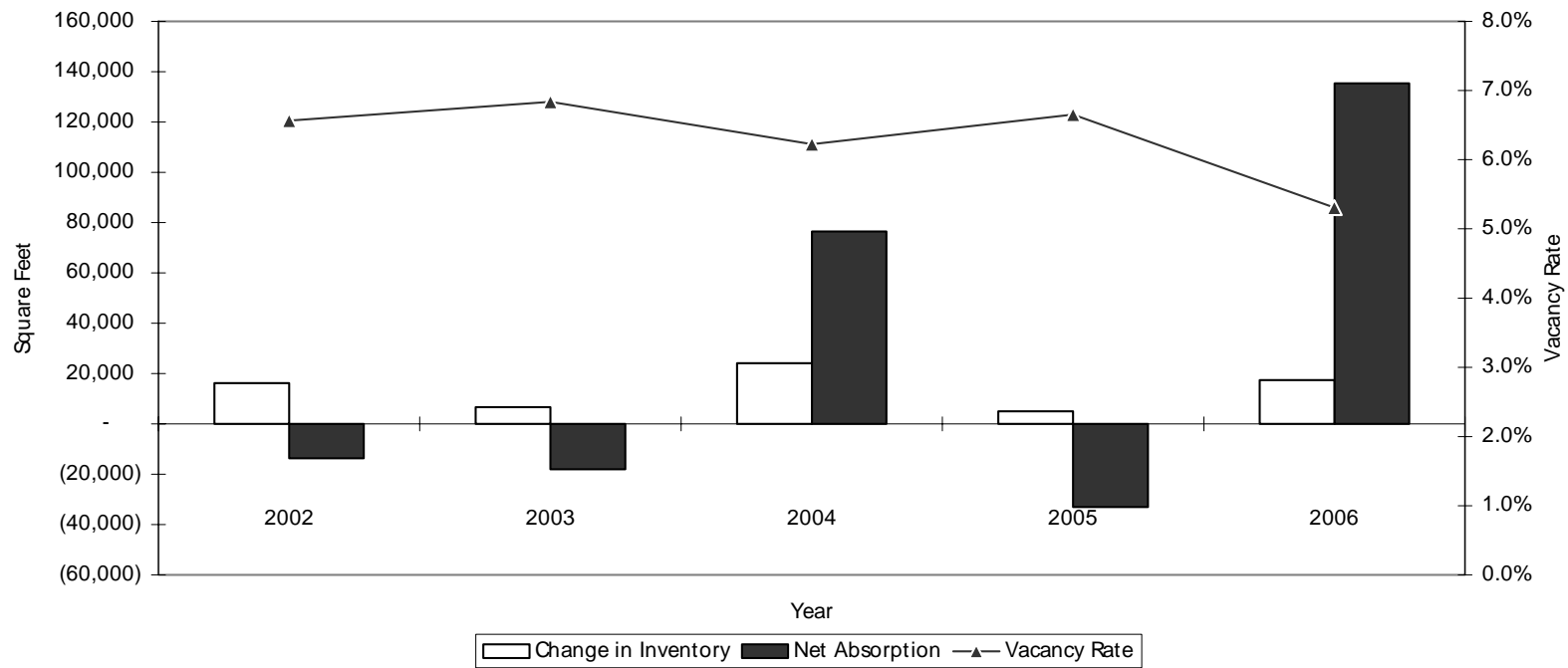
Similar to the QBB Office Market Area, net absorption within the Jamaica Office Submarket Area has also been somewhat uneven. Absorption ranged from negative 241,000 square feet in 1998 to 135,000 square feet in 2006. Vacancy rates have ranged from about 3.4 percent in 1997 to 8.0 percent the following year. Figures 48 and 49 present trends in absorption, inventory, and vacancy in the Jamaica Office Submarket Area.

**Figure 48: Jamaica Office Submarket Area Trends (1997–2006)**

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
<b>Inventory</b>										
Buildings	342	344	345	345	346	347	348	349	350	352
Square Feet	8,536,037	8,699,037	8,703,837	8,703,837	8,795,330	8,811,542	8,818,243	8,842,335	8,847,319	8,864,758
Change in Inventory		163,000	4,800	-	91,493	16,212	6,701	24,092	4,984	17,439
<b>Vacancy</b>										
Square Feet	290,772	694,530	650,784	386,597	548,418	578,255	602,997	550,557	588,537	470,595
Vacancy Rate	3.4%	8.0%	7.5%	4.4%	6.2%	6.6%	6.8%	6.2%	6.7%	5.3%
<b>Net Absorption</b>	34,632	(240,758)	48,546	264,187	(70,328)	(13,625)	(18,041)	76,532	(32,996)	135,381

Source: CoStar Group; Economics Research Associates

**Figure 49: Jamaica Office Submarket Area Absorption, Inventory, and Vacancy (2002–2006)**



*Source: CoStar Group; Economics Research Associates*

The Jamaica Office Submarket Area absorbed an average of about 340,000 square feet of office space, annually, in 2002 through 2006. In Figure 50, ERA presents average gross absorption in 2002 through 2006 and 2006 alone. If similar average gross absorption is achieved over the next five years, Jamaica Office Submarket will experience demand for 1.7 million square feet of office space.

**Figure 50: Jamaica Office Submarket Area Gross Absorption (2002-2006)**

<b>Market/Submarket</b>	<b>Average Annual Gross Absorption (2002-2006)</b>	<b>Annual Gross Absorption (2006)</b>
Jamaica Submarket	338,896	502,318
Queens	1,112,267	1,087,346

Source: CoStar Group; Economics Research Associates

## Key Office Findings

### Employment Trends, Projections, and Demand for Office Space

- Office-using industry sectors including education and health services, professional business services, finance, and information added about 45,000 jobs in Queens between 1990 and 2005.
- Detailed analysis of occupational employment projections indicates that Queens will add about 1,800 office-using positions annually through 2014.
- ERA estimates that net new office-using jobs in Queens will support development of roughly 450,000 square feet of office space annually.
- If the Jamaica Office Submarket Area captures its fair share of demand, the area will attract development of 950,000 square feet of new office space over the next five years.

### Office Market Trends

- Queens, Brooklyn, and the Bronx constitute an office market area with over 50 million square feet of office space.
- There are approximately 21 million square feet of office space in Queens, roughly 40 percent of the QBB Office Market Area total.
- Vacancy in Queens is healthy at 6.7 percent of inventory, lower than the 8.7 percent vacancy reported in the QBB Office Market area.
- Annual gross absorption of office space averaged nearly 2.9 million square feet in the QBB Office Market Area and 1.1 million square feet in Queens between 2002 and 2006.
- The Jamaica Office Submarket Area contains approximately 352 buildings with over 8.9 million square feet of office space.
- Annual gross absorption in the Jamaica Office Submarket averaged about 340,000 square feet annually 2002 through 2006.
- Average gross demand for office space in the Jamaica Office Submarket over the last five years suggests that demand for 1.7 million square feet of office space could be realized over the next five years.

### Potential for Accelerated Office Development

- Increasingly high lease rates and low vacancy rates in Manhattan have the potential to increase demand for office space in Queens.
- Zoning changes have the potential to encourage office development.
- A targeted campaign to attract businesses seeking build-to-suit sites for office space could stimulate demand for office space in the BOA.



- Assembling shovel-ready sites for development will increase the attractiveness of the BOA to potential developers.

## VIII. Industrial/Flex Market Analysis

### Overview and Methodology

This section provides analysis of the market for industrial/flex space in Queens and the Jamaica Industrial/Flex Submarket Area.<sup>24</sup> To evaluate the potential for the area to support industrial/flex development, ERA provides a qualitative assessment of market potential, with a focus on the potential to identify build-to-suit tenants and pre-lease space. In addition, the analysis relies on occupational employment projections to quantify job growth and demand for new industrial/flex space. ERA also analyzes market trends in Queens, Brooklyn, and the Bronx as well as the Jamaica Industrial/Flex Submarket to evaluate potential demand for industrial/flex space in the future.

### Qualitative Factors Influencing Development Potential

While the analysis relies on labor projections and past market trends to quantify demand for future speculative industrial/flex space in the Jamaica Industrial/Flex Submarket Area, in the case of an emerging market, even the most current data may understate future potential. Similar to the market for office space, the performance of the industrial/flex market within the BOA has been influenced by the lack of options available to developers and businesses interested in the area. The BOA does not currently offer shovel-ready development sites or industrial/flex space that meets the needs of today's industrial users. While a variety of constraints have prevented the BOA from achieving its potential, there are a number of factors that support the idea that the Area has the potential to support significant industrial/flex development in the future:

- Superior access to major highways, Kennedy Airport, the New York City subway and bus system, and the Long Island Railroad;
- Proximity to a diverse workforce;
- Zoning changes throughout New York City have the potential to increase demand for industrial development in Jamaica as residential development displaces industrial uses in other areas; and
- Zoning changes have the potential to encourage industrial/flex development;

As with office development, it is unlikely that the BOA will undergo an organic industrial/flex development boom in the near future. Disparate property ownership in the area is problematic as large tracts are needed to construct desirable industrial/flex buildings. Assembling shovel-ready sites will increase the attractiveness of the BOA to potential developers. In addition, potential anchor tenants must be identified as developers are unlikely to build industrial/flex space without first establishing an agreement with an anchor tenant. A targeted campaign to identify and incentivize businesses seeking build-to-suit sites for industrial/flex space could increase demand for space in the BOA. Potential tenants include:

- Industrial uses relocating from other areas within New York City (e.g., food manufacturing);
- Technical service providers (e.g., electronic and mechanical);

<sup>24</sup> The Jamaica industrial/flex submarket includes Queens zip codes within a 5-mile radius of the intersection of Archer Avenue and Sutphin Boulevard.

- Wholesale trade companies; and
- Warehousing, distribution, and logistics firms.

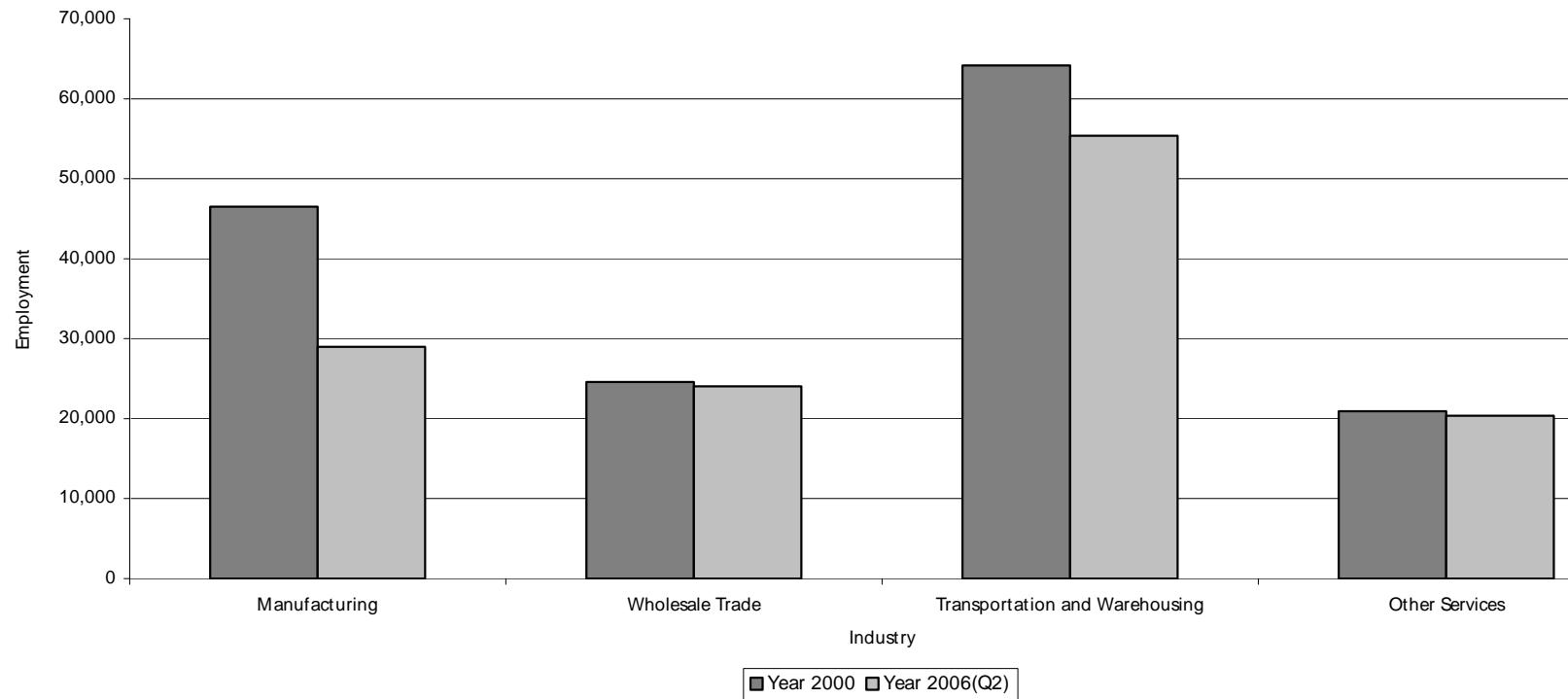
Examination of current industrial/flex development projects in Queens provides insights applicable to Jamaica. The following projects generally support the concept that larger industrial/flex facilities with a predetermined anchor tenant are most likely to succeed in the BOA:

- Regional headquarters for the Food and Drug Administration (FDA), completed in 1999, includes 275,000 square feet of office/laboratory space, classified as flex space.
- FedEx affiliate Steel Equities is building a new 225,265-square-foot facility in Astoria, Queens. The new location will serve as Fed Ex's eighth overnight transfer center in the US.
- Three businesses are building two facilities at the College Point Industrial Park. ARES Printing & Packaging will move its headquarters to College Point from Brooklyn after constructing a 75,000-square-foot facility. New York Sign City of Flushing, Queens, and Inland Paper Products of Brooklyn will share a building of similar size.

## Employment Trends

Industry sectors driving the market for industrial/flex spaces include manufacturing, wholesale trade, transportation and warehousing, and other services. As shown in Figure 51, trends in Queens indicate that employment in these industries has declined. However, there are a number of industrial/flex-using industry sub-sectors that have added jobs since 2000. Figure 52 highlights those sub-sectors that have added net new jobs in Queens since 2000, including merchant wholesalers (858 jobs), warehouse and storage (393 jobs), personal and laundry services (243 jobs), electronics markets agents/brokers (118 jobs), truck transportation (49 jobs), and petroleum and coal products manufacturing (33 jobs).

**Figure 51: Industrial/Flex-Using Employment In Queens County (2000 and 2006)**



Source: New York State Department of Labor (Quarterly Census of Employment and Wages); Economics Research Associates

**Figure 52: Industrial/Flex-Using Industry Trends In Queens County (2000–2006)**

Industry	Average Employment 2000	Average Employment Q2,2006	Change	Annualized Change
<b>Manufacturing</b>	<b>46,504</b>	<b>28,982</b>	<b>-17,522</b>	<b>-7.6%</b>
Food Manufacturing	4,506	3,983	-523	-2.0%
Textile Mills	1,200	278	-922	-21.6%
Textile Product Mills	568	415	-153	-5.1%
Apparel Manufacturing	10,675	4,370	-6,305	-13.8%
Leather and Allied Product Manufacturing	131	108	-23	-3.2%
Wood Product Manufacturing	403	286	-117	-5.6%
Paper Manufacturing	1,730	1,235	-495	-5.5%
Printing and Related Support Activities	3,182	2,187	-995	-6.1%
Petroleum & Coal Products Manufacturing	47	80	33	9.3%
Chemical Manufacturing	1,323	1,078	-245	-3.4%
Plastics & Rubber Products Manufacturing	1,194	378	-816	-17.4%
Nonmetallic Mineral Product Mfg	1,020	948	-72	-1.2%
Primary Metal Manufacturing	127	58	-69	-12.2%
Fabricated Metal Product Manufacturing	3,371	2,620	-751	-4.1%
Machinery Manufacturing	1,655	999	-656	-8.1%
Computer and Electronic Product Mfg	1,922	1,666	-256	-2.4%
Electrical Equipment and Appliances	2,972	1,435	-1,537	-11.4%
Transportation Equipment Manufacturing	1,543	1,425	-118	-1.3%
Furniture and Related Product Mfg	1,962	1,547	-415	-3.9%
Miscellaneous Manufacturing	6,231	3,708	-2,523	-8.3%
<b>Wholesale Trade</b>	<b>24,580</b>	<b>24,056</b>	<b>-524</b>	<b>-0.4%</b>
Merchant Wholesalers, Durable Goods	12,537	11,037	-1,500	-2.1%
Merchant Wholesalers, Nondurable Goods	10,942	11,800	858	1.3%
Electronic Markets and Agents/Brokers	1,101	1,219	118	1.7%
<b>Transportation and Warehousing</b>	<b>64,174</b>	<b>55,383</b>	<b>-8,791</b>	<b>-2.4%</b>
Air Transportation	29,080	23,431	-5,649	-3.5%
Water Transportation	23	23	0	0.0%
Truck Transportation	3,259	3,308	49	0.2%
Transit and Ground Passenger Transport	11,258	9,997	-1,261	-2.0%
Scenic and Sightseeing Transportation	180	159	-21	-2.0%
Support Activities for Transportation	12,784	11,738	-1,046	-1.4%
Couriers and Messengers	6,459	5,205	-1,254	-3.5%
Warehousing and Storage	1,111	1,504	393	5.2%
<b>Information</b>	<b>10,663</b>	<b>8,713</b>	<b>-1,950</b>	<b>-3.3%</b>
Publishing Industries	1,544	1,118	-426	-5.2%
Motion Picture & Sound Recording	656	626	-30	-0.8%
Broadcasting (except Internet)	2,157	2,108	-49	-0.4%
Internet Publishing and Broadcasting	-	6	-	-
Telecommunications	3,998	2,802	-1,196	-5.8%
ISPs, Search Portals, & Data Processing	513	331	-182	-7.0%
Other Information Services	1,776	1,722	-54	-0.5%
<b>Other Services</b>	<b>20,937</b>	<b>20,368</b>	<b>-569</b>	<b>-0.5%</b>
Repair and Maintenance	5,460	4,708	-752	-2.4%
Personal and Laundry Services	7,284	7,527	243	0.5%
Membership Organizations & Associations	7,450	7,529	79	0.2%
Private Households	743	604	-139	-3.4%

Source: New York State Department of Labor; Economics Research Associates

## **Employment-Based Estimate of Demand for Industrial/Flex Space**

To generate an estimate of future demand for industrial/flex space in the Jamaica Industrial/Flex Submarket Area, ERA relies on occupational employment projections provided by New York State Department of Labor. Similar to the office analysis, ERA estimates industrial/flex-using employment growth in Queens by allocating projected job growth in New York City to Queens based on the current share of employment there, by industry sector. The analysis relies on projected growth in industrial/flex-using jobs in Queens to estimate market-supportable development. ERA relies on the Submarket's fair share of industrial/flex inventory to allocate supportable industrial/flex space in Queens County to the Jamaica Industrial/Flex Submarket Area.

Figure 53 presents annual industrial/flex-using employment growth and annual demand for new space within Queens County. As shown, ERA expects annual employment growth in industrial/flex-using occupations to be about 900 jobs per year in Queens. Assuming 400 square feet per employee, ERA estimates annual demand for approximately 360,000 square feet of industrial/flex space in Queens.

Approximately 26 percent of Queens' industrial/flex space is in the Jamaica Industrial/Flex Submarket Area. For this analysis, ERA assumes that this proportion of future industrial/flex product deliveries will occur in the Jamaica Industrial/Flex Submarket Area. Based on employment projections and the Submarket's fair share of industrial/flex space, ERA estimates that the Jamaica Industrial/Flex Submarket will attract demand for roughly 470,000 square feet of new industrial/flex space over the next five years.

**Figure 53: Projected Annual Employment Growth and Demand for Industrial/Flex Space in Queens County (2007-2014)**

Occupation	Projected Industrial/Flex-Using Employment	Demand for Industrial/Flex Space <sup>1</sup>
Life, Physical, and Social Science Occupations	13	5,000
Arts, Design, Entertainment, Sports, and Media Occupations	74	30,000
Sales and Related Occupations	169	68,000
Installation, Maintenance, and Repair Occupations	367	147,000
Transportation and Material Moving Occupations	<u>282</u>	<u>113,000</u>
<b>Total, All Occupations</b>	<b>906</b>	<b>363,000</b>

Source: New York State Department of Labor; Economics Research Associates

<sup>1</sup> Assumes 400 square feet per employee.



## Industrial/Flex Market Trends

Queens, Brooklyn, and the Bronx (referred to as the QBB Industrial/Flex Market Area) constitute an industrial/flex market area with roughly 166 million square feet of space. There are approximately 70 million square feet of industrial/flex space in Queens, roughly 40 percent of the market area total. The vacancy rate in the industrial/flex market area is 4.1 percent. Though higher than in the industrial/flex market area, vacancy in Queens is healthy at 4.4 percent of inventory.

**Figure 54: QBB Industrial/Flex Market Area Overview (Fourth Quarter 2006)**

Market/Submarket	Existing Square Feet	Number of Buildings	Vacancy (Square Feet)	Vacancy Rate
Queens	70,362,493	2,132	3,066,693	4.4%
Bronx	19,411,582	638	721,800	3.7%
Brooklyn	75,801,421	2,276	2,971,555	3.9%
<b>Total</b>	<b>165,575,496</b>	<b>5,046</b>	<b>6,760,048</b>	<b>4.1%</b>

Source: CoStar Group; Economics Research Associates

Over the past nine years, the QBB Industrial/Flex Market Area has added more than 2.3 million square feet of space. There was significant net absorption occurring in the 1998, 1999, 2002, and 2005 and significant negative net absorption in 2000 and 2001. Vacancy has ranged from about 4.0 million square feet in 1999 to over 7.7 million square feet in 2004. The vacancy rate peaked in 2004 at 4.7 percent and has fallen to 4.1 percent since then.

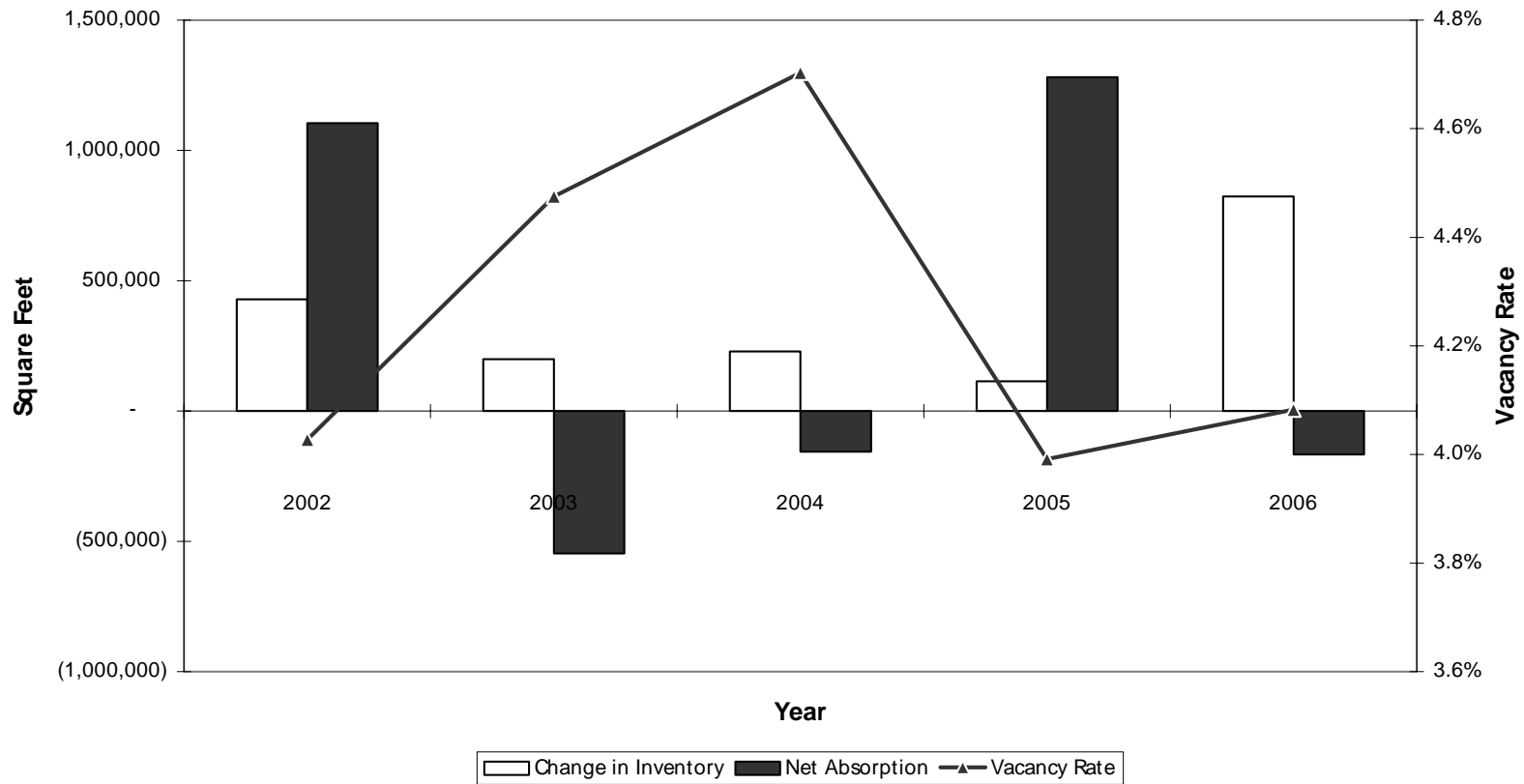
Figure 55 and Figure 56 graphically present trending in industrial/flex space inventory, absorption, and vacancy in the QBB Industrial/Flex Market Area from 2002 through 2006. As shown, vacancy rates were driven to a high of 4.7 percent in 2004 due to negative net absorption. Positive net absorption of nearly 1.3 million square feet the following year reduced the vacancy rate to 4.0 percent. Increased supply and negative net absorption in 2006 increased the vacancy rate slightly, to 4.1 percent.

**Figure 55: QBB Industrial/Flex Market Area Trends (1997–2006)**

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
<b>Inventory</b>										
Buildings	4,946	4,947	4,957	4,964	4,969	4,978	4,981	4,988	4,991	5,046
Square Feet	163,252,888	163,264,888	163,431,066	163,749,817	163,780,917	164,209,740	164,408,610	164,637,804	164,751,954	165,575,496
Change in Inventory		12,000	166,178	318,751	31,100	428,823	198,870	229,194	114,150	823,542
<b>Vacancy</b>										
Square Feet	6,480,528	4,901,858	4,009,649	5,745,999	7,288,983	6,613,051	7,357,655	7,742,830	6,575,873	6,760,048
Vacancy Rate	4.0%	3.0%	2.5%	3.5%	4.5%	4.0%	4.5%	4.7%	4.0%	4.1%
<b>Net Absorption</b>	(1,829,746)	1,590,670	1,058,387	(1,417,599)	(1,511,884)	1,104,755	(545,734)	(155,981)	1,281,107	(166,575)

Source: CoStar Group; Economics Research Associates

**Figure 56: QBB Industrial/Flex Market Area Inventory, Absorption, and Vacancy (2002–2006)**



*Source: CoStar Group; Economics Research Associates*

The QBB Industrial/Flex Market Area absorbed an average of roughly 5.5 million square feet annually 2002 through 2006. Of this, Queens absorbed an average of about 2.6 million square feet per year, more than Brooklyn or the Bronx. Figure 57 presents the average gross absorption of industrial/flex space located in the industrial/flex market area over the last five years.

**Figure 57: QBB Industrial/Flex Market Area Gross Absorption (2002-2006)**

<b>Market/Submarket</b>	<b>Average Annual Net Absorption (2002-2006)</b>	<b>Annual Net Absorption (2006)</b>
Queens	2,628,434	1,805,724
Bronx	998,261	390,898
<u>Brooklyn</u>	<u>1,887,719</u>	<u>1,808,863</u>
<b>Total</b>	<b>5,514,414</b>	<b>4,005,485</b>

Source: CoStar Group; Economics Research Associates

### Jamaica Industrial/Flex Submarket Area Trends

The Jamaica Industrial/Flex Submarket Area contains approximately 689 buildings containing nearly 18 million square feet, of which 510,000 square feet (i.e., 2.8 percent) are vacant. As shown in Figure 58, CoStar reports that five industrial/flex buildings were added to the Jamaica Industrial/Flex Submarket Area (net of demolitions) between 1997 and 2006.

Absorption of industrial/flex space in Jamaica Submarket has been irregular over the past decade. Net absorption hit a high of nearly 400,000 square feet in 2004 and a low of negative 158,000 in 2000. Vacancy rates have ranged from about 2.4 percent in 1997 to nearly 4.3 percent in 2003.

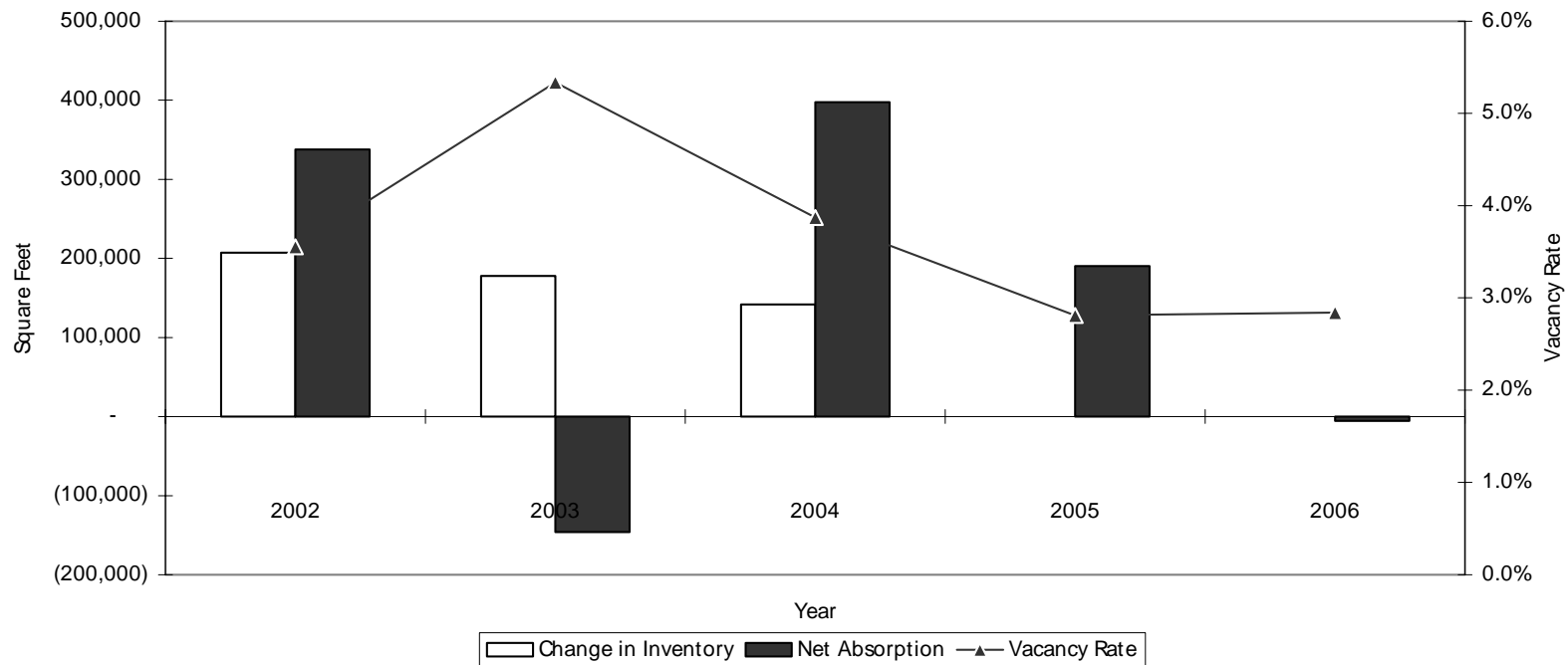
Figure 60 graphically displays trends in the Jamaica Industrial/Flex Submarket absorption, inventory, and vacancy between 2002 and 2006. As shown, vacancy rates have generally trended downward since 2003 due to positive net absorption.

**Figure 58: Jamaica Industrial/Flex Submarket Area Trends (1997-2006)**

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
<b>Inventory</b>										
Buildings	684	684	685	685	685	687	688	689	689	689
Square Feet	17,430,592	17,430,592	17,434,592	17,434,592	17,434,592	17,641,895	17,819,765	17,961,547	17,961,547	17,961,547
Change in Inventory		-	4,000	-	-	207,303	177,870	141,782	-	-
<b>Vacancy</b>										
Square Feet	420,479	441,035	520,537	678,521	757,483	627,121	951,055	695,252	504,788	510,281
Vacancy Rate	2.4%	2.5%	3.0%	3.9%	4.3%	3.6%	5.3%	3.9%	2.8%	2.8%
<b>Net Absorption</b>	96,636	(20,556)	(75,502)	(157,984)	(78,962)	337,665	(146,064)	397,585	190,464	(5,493)

Source: CoStar Group; Economics Research Associates

**Figure 59: Jamaica Industrial/Flex Submarket Absorption, Inventory, and Vacancy (2002-2006)**



*Source: CoStar Group; Economics Research Associates*



The Jamaica Industrial/Flex Submarket Area absorbed an average of about 671,000 square feet of space annually 2002 through 2006. In Figure 60, ERA presents average gross absorption 2002 through 2006.

**Figure 60: Jamaica Industrial/Flex Submarket Area Gross Absorption (2002-2006)**

<b>Market/Submarket</b>	<b>Average Annual Gross Absorption (2002-2006)</b>	<b>Annual Gross Absorption (2006)</b>
Jamaica Submarket	670,983	370,617
Queens	2,628,434	1,805,724

Source: CoStar Group; Economics Research Associates



## Key Industrial/Flex Findings

### Employment Trends, Projections, and Demand for Industrial/Flex Space

- Overall, industrial/flex-using industry sectors have eliminated jobs in recent years. However, a number of industrial/flex-using industry sub-sectors, including merchant wholesalers, warehouse and storage, and electronics markets agents/brokers, have added jobs since 2000.
- Occupational employment projections indicate that Queens will add about 900 industrial/flex-using positions annually through 2014.
- ERA estimates that new industrial/flex-using jobs in Queens will require roughly 360,000 square feet of industrial/flex space annually.
- If the Jamaica Industrial/Flex Submarket Area captures its fair share of demand, the area will attract development of 470,000 square feet of new industrial/flex space over the next five years.

## Industrial/Flex Market Trends

- Queens, Brooklyn, and the Bronx constitute an industrial/flex market area with over 165 million square feet of space.
- There are approximately 70 million square feet of industrial/flex space in Queens, roughly 40 percent of the QBB Industrial/Flex Market Area total.
- Vacancy in Queens is healthy at 4.4 percent of inventory, though higher than the 4.1 percent vacancy in the QBB Industrial/Flex Market Area.
- Gross absorption of industrial/flex space averaged 5.5 million square feet in the QBB Industrial/Flex Market Area and 2.6 million square feet in Queens between 2002 and 2006.
- The Jamaica Industrial/Flex Submarket Area contains approximately 689 buildings with nearly 18 million square feet of space.
- Gross absorption in the Jamaica Industrial/Flex Submarket averaged about 671,000 square feet annually 2002 through 2006.
- Average gross absorption of industrial/flex space in Jamaica suggests that demand for 3.4 million square feet of industrial/flex space could be realized over the next five years.

## Potential for Accelerated Industrial Development

- Zoning changes throughout New York City have the potential to increase demand for industrial development in Jamaica, as residential development in the urban core pushes industrial uses out.
- A targeted campaign to attract businesses seeking sites for build-to-suit industrial/flex development could stimulate demand for space in the BOA.
- Assembling shovel-ready sites for development will increase the attractiveness of the BOA to potential developers.

## Appendix D – Summaries of Consultant Products

### Executive Summary 1: Area/Infrastructure Analysis

Prepared by Gannett Fleming Engineers and Architects, P.C.  
For  
Greater Jamaica Development Corporation  
February 15, 2008

#### Vehicular, Bicycle, Pedestrian and Public Transportation Technical Memorandum

This study assesses the current transportation infrastructure conditions and capacity of the BOA area and serves as a basis for developing a preliminary 10-year capital improvement program. The goal of this program is to address current safety and functional deficiencies, improve transportation modal options and provide the needed system capacity to meet the requirements of the long term development goals established for the BOA areas.

This transportation infrastructure assessment draws primarily from two transportation studies completed within the last few years. The first study was done in May of 2006 by Taub & Associates to evaluate a proposed redesign of the Sutphin Boulevard/Archer Avenue intersection as well as the extension of Atlantic Avenue and conversion of 94th and 95th Streets to a one-way pair configuration. In February 2007 the New York City Department of City Planning completed an Environmental Impact Statement for the Jamaica Plan Rezoning which included the BOA area. The two studies together provide comprehensive coverage of the existing traffic, pedestrian and transit conditions in the BOA area.

#### **Recommended Improvements for BOA Sites**

A series of transportation improvements were identified to support both general deficiencies identified through the existing infrastructure assessments, and to support potential development activities. In most cases, the recommendations described should be implemented independently of whether or not new development occurs.

##### *a. Strategic Site-1 (Tuckerton BOA)*

- Liberty Avenue Roadway Upgrade and Streetscaping from the Van Wyck Expressway to the Liberty Avenue underpass of LIRR at 157<sup>th</sup> Street
- Improve Pedestrian Safety Along Liberty Avenue
- Pursue Beaver Road Abandonment
- Reconstruction of 150<sup>th</sup> Street from Archer Avenue to Liberty Avenue
- 150<sup>th</sup> Street Underpass of LIRR Safety Improvements
- Intersection Improvements at 94<sup>th</sup> Avenue, Beaver Street and 157<sup>th</sup> Street Intersection
- 158<sup>th</sup> Street Underpass of LIRR Safety Improvements

##### *b. Strategic Site-2(Western Gateway BOA)*

- Due to the size and location of this site, there were no specific recommendations identi-

fied.

*c. Strategic Site 3 (Station Area BOA)*

- Reconstruction of Archer Avenue from the Jamaica Station Plaza Project to 152<sup>th</sup> Street
- Realign the 150<sup>th</sup> Street/Archer Avenue/Bus Station Access-way Intersection Improve the Off Street Parking Area Along the South Side of Archer Avenue east of 150<sup>th</sup> Street

*d. Strategic Site 4 (Liberty Gateway)*

- Reconstruction of 150<sup>th</sup> Street from Archer Avenue to Liberty Avenue (Linked to Tuckerton BOA Improvements)
- Reconstruction of 148<sup>th</sup> Street from 94<sup>th</sup> Avenue to 97<sup>th</sup> Avenue
- 150<sup>th</sup> Street LIRR Underpass Safety Improvements (Linked to Tuckerton BOA Improvements)

*e. Strategic Site 5 (Liberty Gateway)*

- Liberty Avenue Roadway Upgrade and Streetscaping from the Van Wyck Expressway to the LIRR overpass at 157<sup>th</sup> Street (Linked to Tuckerton BOA Improvements)
- Upgrade and Streetscaping of Sutphin Boulevard from 94<sup>th</sup> Avenue to Liberty Avenue
- Improve Pedestrian Safety Along Sutphin Avenue south of the 94<sup>th</sup> Avenue
- Realign the Sutphin Boulevard/Liberty Avenue/146<sup>th</sup> Street Intersection
- Implement Special Gateway/Urban Design Improvements at the Sutphin Boulevard/Liberty Avenue Intersection

## Executive Summary 2: Environmental Assessment

Modified Environmental Site Assessments Within Proposed Brownfield Opportunity Areas  
Prepared by Gannett Fleming Engineers, P.C.  
For  
Greater Jamaica Development Corporation  
January 26, 2008

Prepared By:  
Michael Wagner  
Project Engineer

Reviewed By:  
Vincent Frisina, P.E.  
Director of Environmental Services

Greater Jamaica Development Corporation (GJDC) retained Gannett Fleming Engineers, P.C. (GF) to perform Environmental Site Assessments (ESAs) for four areas identified within a Brownfields Opportunity Area; these sites are designated as BOA-1, BOA-2, BOA-4 and BOA 5. A third site (BOA-3) was not included in this Study as the site was already slated to be the subject of a series of Phase I ESAs for a separate initiative. These four areas are comprised of sixty-one (61) individual properties located in Jamaica Queens, New York. These ESAs were performed to assess the potential for environmental impacts on the subject properties associated with historical land use and to estimate the level of future effort required to comply with New York State Department of Environmental Conservation (NYSDEC) investigation and remediation requirements.

The scope of work for these ESAs consisted of complying and evaluating available information to identify environmental issues of concern that could hinder the redevelopment of these sites. Each ESA consisted of three main components: A street level site reconnaissance, an environmental database review and an historical land use review. Based upon the assessments' findings, GF estimated the level of further investigatory effort required for each individual lot/property and prepared cost estimates to conduct future Phase I and II ESAs.

The results of these ESAs indicate that environmental impacts may have occurred across each site. However, GF has identified several properties in each of the sites which do not appear to have any indications of Environmental Conditions (ECs). 16 properties of a total of 61 properties assessed have been identified as potentially not requiring Phase I ESAs. While these properties could potentially be developed without any further investigation, GF recommends that a formal Phase I ESA be completed for all properties within the sites prior to acquisition. Each Phase I ESA should cost approximately \$3,000 to complete, therefore the total cost for conducting these assessments for BOA-1 should be \$105,000, for BOA-2 should be \$27,000, for BOA-4 should be \$18,000, and for BOA-5 should be \$33,000.

GF also recommends that a number of Phase II ESAs be performed across the sites. Based upon the information gathered during this investigation, gross estimates were made regarding soil and groundwater sampling efforts in order to estimate the cost of conducting each of the noted Phase II ESAs. The total estimated cost for conducting 27 Phase II investigations for BOA-1 would be approximately \$1,000,000; for conducting 6 Phase II investigations for BOA-2 would be approximately \$300,000; for conducting 6 Phase II investigations for BOA-4 would be approximately \$300,000; and for conducting 6 Phase II investigations for BOA-5 would be approximately \$150,000.

## Executive Summary 3: Feasibility Study

Preface: HR&A Advisors, in their Development Feasibility Analysis, determined that the four redevelopment scenarios originally identified in the BOA Nomination Study were not feasible based on an examination of the development costs and the gap financing needed for the projects. Since this analysis was completed in 2008 the availability of gap financing has decreased significantly. While the change in the real estate market since that time may change the degree to which any of these projects are deemed “feasible”, the analysis remains valuable in its estimate of the development cost and the gap financing needed. An updated development feasibility study would reexamine the program mix in light of the recent changes in the real estate market, which include a substantial decline in demand for residential development.

Prepared by HR&A Advisors, Inc.  
For  
Greater Jamaica Development Corporation  
May 27, 2009

GJDC retained HR&A to analyze four sites within designated Brownfield Opportunity Areas (BOAs) in Jamaica, Queens to assess their potential for feasible redevelopment. This analysis contributes to Phase II of the New York State Brownfield Opportunity Area program for Jamaica, and supports the nomination of these sites for additional implementation support under the BOA program.

HR&A’s assignment focused on:

1. Development of an appropriate **program mix** for each BOA site based on site conditions, local real estate market and projected capital market conditions,
2. An **order-of-magnitude feasibility analysis** for each area, identifying the overall financial gap as a basis for prioritizing redevelopment, and
3. An analysis illustrating the **types of individual uses** that are likely to be the most successful on each site. As individual parcels within each site are prioritized for redevelopment, financial feasibility conclusions for these projects will differ from that of the site as a whole.

### **Program Mix Analysis**

HR&A worked with GJDC staff and the BOA consulting team to create redevelopment programs for each of the four sites based on the maximum zoning envelope for each site, current site conditions, and a series of market considerations. The preferred program mix resulting from this analysis is summarized as follows:

SUMMARY	BOA-1	BOA-2	BOA-4	BOA-5
<b>DEVELOPMENT PROGRAM</b>				
BOA Area	Tuckerton	W. Gateway	Liberty Gateway	Liberty Gateway
<b>Current Use</b>				
Primary Use	Industrial	Utility	Industrial	Residential
Secondary Uses	Commercial	Residential, Industrial	Commercial	Retail, Industrial
<b>Proposed Uses (Net Square Feet)</b>				
Market Rentals	-	138,713	-	182,451
Affordable Rentals	-	34,678	-	45,613
Office	23,430	163,391	65,600	-
Industrial	156,200	-	93,666	-
Retail	43,800	10,000	-	49,383
Total Area	223,430	346,781	159,266	277,446

### Site Feasibility Analysis

To assess feasibility, HR&A worked with GJDC and its team to develop and confirm the reasonableness of a set of assumptions regarding potential acquisition costs, achievable net rents, construction cost and capital markets assumptions. Research included outreach to property owners, developers and operators, and use of secondary real estate market data sources. HR&A developed a pro forma financial model for each site to estimate overall financial outcomes for each of the four areas, assuming full redevelopment of each site.

The analysis below yields the following findings, with alternative options explored in the following section.

SUMMARY	BOA-1	BOA-2	BOA-4	BOA-5
<b>Development Costs</b>				
Acquisition/Remediation Costs	\$13.7 M	\$16.7 M	\$8.3 M	\$27.7 M
Development Costs	\$41.3 M	\$114.0 M	\$28.0 M	\$99.0 M
Total Costs	\$54.9 M	\$130.8 M	\$36.3 M	\$126.8 M
<b>Development Feasibility</b>				
Gap Financing Needs	\$11.9 M	\$19.2 M	\$8.9 M	\$35.4 M
Less: Brownfield Tax Credits	\$3.1 M	\$14.3 M	\$4.6 M	\$31.8 M
Feasibility Conclusion	Infeasible	Infeasible	Infeasible	Infeasible

Taken as large-scale development plans, it is apparent that development feasibility for each site is very limited. Even accounting for potential Brownfield Redevelopment Tax Credits (BRTC), significant amounts of public subsidy would still be required to redevelop each BOA site in its entirety with the program developed under this analysis. These initial findings suggest that a large-scale redevelopment of any BOA site is likely not the preferred approach to future implementation.

### Partial Site Development Potential

To develop a framework and approach for feasible development options, HR&A analyzed each potential product type to determine which uses are most likely to be feasible under future redevelopment scenarios. Our initial findings should be explored in greater detail with site specific development study, but should serve to guide future implementation strategies. Our findings are as follows:

*Mixed income residential housing may be feasible with additional financing sources or alternative construction types.* Given current construction costs, market residential rents (approximately 130% of area median income) appear to be insufficient to provide a reasonable return on investment when combined with 20% affordable units at 50% AMI. However, the BOA-2 and BOA-5 sites would appear to be favorable sites for construction of residential housing, and therefore alternative construction or financing structures should be examined, including potentially:

- Partnership with non-profit developers such as Habitat for Humanity or local Community Development Corporations,
- Physical typologies other than dense multi-story development,
- Funding from affordable housing programs, including New York State Housing Finance Agency, New York City Housing Development Corporation, New York City Department of Housing Preservation and Development or other appropriate agencies, and
- HOME, CDBG or other federal, state and local grant programs.

*Commercial uses adjacent to JFK Airport transit connections have high potential for feasibility.* Office rents in BOA-2, which is adjacent to the Jamaica LIRR and AirTrain Station, would support office development on that site due to access to the regional transportation network and JFK Airport. The prospect of an airport-related hotel should also be examined for this site.

*Industrial rehabilitation projects should be considered within existing industrial sites.* Although industrial rents do not appear to support construction of new flex industrial facilities in the near future, lower-cost rehabilitation projects for existing buildings in BOA-1 and BOA-4 may be feasible in the shorter-term and could lead to significant increases in industrial activity as well as remediation of portions of sites.

*Retail development may be possible where significant local pedestrian traffic occurs, though high site remediation costs may limit the potential of retail on its own.* Parcels within BOA-5 are likely to produce feasible retail development projects given the proximity to Liberty Avenue and nearby residential communities. Parcels within BOA-2 could support ground floor retail on the major local thoroughfare of Archer Avenue, though it will be important to test whether achievable retail rents will be sufficient if the uses are not integrated into a larger mixed-use plan for a portion of the site.

*In summary, HR&A found that retail uses in BOA-5 and BOA-2 and commercial development (office and/or hotel) in BOA-2 present the best opportunity for near-term re-development. Specific redevelopment opportunities should be researched within these two sites for implementation purposes.*



## Appendix E – Advisory Committee Meeting Summaries

### MEETING SUMMARY – Meeting #1

**Location:** Harvest Room

90-40 160<sup>th</sup> Street  
Jamaica, NY 11432

**Date:** June 8, 2006

**Attendees:**

Honorable Leroy Comrie, NYC Council  
Honorable Vivian E. Cook, NY State Assembly  
Sarah Ashcroft, GJDC  
Gloria Black, Community Board 12  
Tom Campagna, Queens Borough President's Office  
Donna Clopton, 148<sup>th</sup> Street Block Association  
Sonya Connigtani, Forest City Ratner  
Curtis Cravens, NYS DOS  
Peter Engelbrecht, GJDC  
Terrell Esteson, NYC DEP  
Jonathan Gouveia, NYC EDC  
James Heyliger, AMENY  
Robert Holbrook, NYC DCP  
Lee Ilan, NYC Office of Environmental Remediation  
Jim MacMorris (for Ron Romeo), Web Capital & Development Corp.  
John McLaughlin, NYC DEP  
Melva Miller, Sutphin Boulevard BID  
Yvonne Reddick, CB 12  
Josslyn Shapiro, NYS DEC  
Peter Xelas, NYC DOT, Queens Borough Office

**Distribution:** All attendees/invitees/file

The purpose of the meeting was to introduce the Brownfield Opportunity Area (BOA) project and discuss the roles and responsibilities of the project team and the advisory committee. Assemblywoman Vivian E. Cook and Carlisle Towery gave brief introductory comments for the meeting, which included a summary of the projects and efforts that have occurred in Jamaica and those that will continue into the future. Curtis Cravens, representing the New York State Department of State, gave some brief comments summarizing his agency's role in the BOA Nomination Study and the BOA Program's emphasis on public participation. Dan Pollay gave a summary of the contents of the Study and the process through which it will be developed. Chris Woods provided an overview of the public outreach process. The following is a summary of pertinent issues and queries.

**• How does the advisory committee access the Project Team?**

Christopher Woods, Community Outreach Consultant, will be the main point of contact for the Greater Jamaica Development Corporation (GJDC) to address all community concerns. Additionally, Mr. Woods will be responsible for implementing the Community Outreach Program. He will work in the areas of program development and dissemination of information. Mr. Woods will be readily accessible throughout the process to ensure an open flow of communication.

- **Have sites been identified for re-development?**

The boundaries of the BOA have been defined per the grant agreement with New York State Department of State, however, no sites have yet been identified for redevelopment within the BOA Program. Currently, the BOA Project Team and consultants will be gathering information and analyzing it with the intent to make recommendations for individual sites.

- **Has the Project Team identified the types of businesses it believes would be appropriate for redeveloped properties?**

The Project Team has not made such a determination. The eventual recommendations for redevelopment, including land use, will be based upon analysis of the data gathered by GJDC, the consultants, and the advisory committee.

- **Has there been community notification prior to this meeting?**

Per GJDC's agreement with NYS Department of State (DOS), this meeting begins the public participation and community outreach process. GJDC has informed a number of community stakeholders about the BOA Program. The BOA Program, and its potential impact on redevelopment efforts near the AirTrain facility were discussed at a recent GJDC membership meeting.

- **Is the BOA process part of the overall redevelopment plan for Jamaica?**

Although the BOA Program operates independent of other redevelopment plans, the impact of these initiatives will be carefully analyzed and incorporated into the Nomination Study.

- **Will state agencies be involved in the redevelopment of the properties?**

The state agencies represented on the advisory committee will be involved in the redevelopment planning process in collaboration with other members. The agencies will be involved only to the extent that any project qualifies for a particular State program, such as the Brownfield Cleanup Program (BCP).

- **There appears to be an imbalance of government agencies and elected officials on the advisory committee. Can additional community groups and block associations be added?**

Yes.

- **Should economic development be the top priority for the BOA process as opposed to public health implications associated with possible contamination?**

The Project Team does not currently possess the data that would be required to assess the public health issues associated with any brownfields in the Study Area. Public agencies such as the New York State Department of Environmental Conservation, an agency represented on the advisory committee, often consider public health issues as they relate to brownfields and have taken action to address them in the past.

- **What impact will the discovery of other brownfields outside of the Study Area have on the selected boundaries?**

There is nothing to prevent the community from preparing an application for more funding to work towards the designation of another area of the community as a Brownfield Opportunity Area (BOA).

- **Is this project a duplication of previous studies and initiatives commissioned in Jamaica?**

Yes, other development studies have been completed for a part, but not all, of the Study Area. However, the BOA Program is a new initiative by NYS Department of State and this Nomination Study is the first known attempt in Jamaica at examining brownfield redevelopment, in particular, on an area-wide basis. A major component of the process will be to gather information, where available, from prior studies.

- **Can data compiled from previous studies be incorporated into the BOA Nomination Study?**

Yes.

• **Is the aquifer work/remediation part of the process?**

Data that is available from other studies and initiatives, including any investigations of the aquifer, will be incorporated into the Study where appropriate and relevant.

• **Why is it necessary to employ additional consultants to analyze previously identified properties within the boundaries of the BOA and will the community be able to interface with the consultants?**

Some of the consultants involved in the drafting of the Nomination Study will have direct experience in brownfield redevelopment and the development of such strategies for brownfields requires a form of expertise not before utilized for other redevelopment planning initiatives. The need to avoid duplication of previous efforts has been acknowledged by both DOS and GJDC. The consultants will be communicating with the community and presenting their findings at the advisory committee meetings.

• **Will additional funds be requested from NYC to complete the Study?**

No, but additional State funds may be requested for the next phase of the project if our work on this Nomination results in the State approving our Study Area as a Brownfield Opportunity Area.

• **Will NYC agencies be involved with the redevelopment process?**

NYC agencies invited as members of the advisory committee will be involved in the planning process. After BOA designation has been granted, agencies will assume their traditional roles in the redevelopment process.

• **Are there lists of brownfield sites identified in NYC?**

Currently, there is no complete list of brownfield sites, as there are many undocumented brownfields throughout the City. There is a list of potential sites that are participating in New York State brownfield programs.

• **Is the West Side site an example of a BOA?**

The West Side site is an example of a brownfield that is in the process of being remediated. Such remediation may occur, much later in this process, if and when brownfields are identified for redevelopment in this BOA Study Area. The West Side site is located outside of the boundaries of our Study Area and, as a site currently being remediated with committed State funding, it is not necessary to apply for additional State funding for that project under BOA.

## **MEETING SUMMARY - Meeting #2**

**Location:** Harvest Room  
90-40 160<sup>th</sup> Street  
Jamaica, NY 11432

**Date:** March 27, 2007

**Attendees:**

Jessica Baker	NYCEDC
Debbie Carney	DCP – Queens Office
Nicole Clare	ERA
Donna Clopton	148 <sup>th</sup> Street Block Association
Curtis Cravens	NYSDOS
Louis Evans	Nixon Peabody
Terrell Estem	NYCDEP
Sean Garrigan	Gannett Fleming
Monica Lewis-Pringle	Office of Sen. Shirley Huntley
Ben Margolis	Phillips Preiss Shapiro
Rev. Ed McKay	Community Board 12

Melva Miller	Sutphin Blvd. BID
Daniel Pollay	GJDC
Dan Ross	NYCDOT
Gary Rozmus	Gannett Fleming
Josslyn Shapiro	NYSDEC
Tammy Shoshan	ERA
Ben Sigman	ERA
Julie Stern	NYCDEP
Richard Werber	GJDC
Muriel Williams	Resident
Chris Woods	Consultant

The meeting focused on several issues related to the redevelopment of brownfields and the utilization of the BOA Program to bring about desired changes in Jamaica.

The meeting focused on two main components.

1. The community participation portion of the BOA Nomination Study process.
2. The profile of the Study Area as researched by the consultants whose services GJDC has secured for the project.

What follows is a summary of the presentations by each speaker.

#### Daniel Pollay (Project Manager - GJDC)

- Introduction of the team of consultants
  - Economics Research Associates
  - Gannett Fleming
  - Nixon Peabody
  - Chris Woods
- Summary of the BOA process in Jamaica to date
- Identification of short-term project management goals
  - Formalize a Vision Statement for the Nomination Study
  - Identify Goals and Objectives
  - Examine redevelopment opportunities through consultants' research and advisory committee guidance

Richard Werber (Director of Industrial Development – GJDC) gave a brief overview of the 3-step BOA process prescribed by New York State's brownfields legislation.

*Step 1: Pre-Nomination Study – preliminary description and analysis of the area.*

*Step 2: Nomination – thorough description of existing conditions, issues and opportunities (Jamaica BOA is in Step 2)*

*Step 3: Implementation Strategy and/or Site Assessments – descriptions of the techniques and actions to implement the plan, as well as site assessments*

#### Chris Woods (Community Outreach Consultant)

- Summary of the draft community participation plan
  - Advisory Committee and Technical Partnership Development
  - Hearings and Workshops
  - Additional Outreach Efforts

- Post-nomination Activities
- Presentation of vision statement, goals and objectives for the Study
  - Vision Statement: *To create through the BOA process the opportunity for revitalization, rehabilitation and community oriented redevelopment of a long underutilized, vacant, blighted and environmentally impaired area of Jamaica.*
  - Goals and objectives
    - Nomination
    - Share findings
    - Jointly explore additional funding
    - Improve quality of life
    - Create economic opportunities/growth
    - Create Housing opportunities

#### Community participation recommendations by the Advisory Committee

- Encourage new efforts to reach out to additional groups not presently involved in the BOA process such as real estate organizations, small business owners along Jamaica Avenue, people who commute into the neighborhood and youth organizations.
- Hold a design charrette to better outline the vision for the redevelopment projects.

Chris Woods indicated that he would implement the above recommendations.

#### Market/Demand Analysis Presentation

The consulting team, led by ERA, gave the results of its demographic and market data analysis. Ben Margolis from Phillips Preiss Shapiro Associates presented the results of his research into the land use history, zoning and brownfield status of properties throughout the Study Area. He also shared with the advisory committee some general observations of development and design characteristics of the area and how those characteristics could be leveraged to bring about new redevelopment successes.

Some of the conclusions put forth by the research are:

- The street pattern in the area and the recent and future infrastructure improvements substantially improve the marketability of certain properties in the Study Area.
- Traditional demand forecasting models indicate a strong market for additional retail and residential development in Downtown Jamaica
- Commercial office and industrial demand are likely to increase due to emerging markets in Jamaica and the pending zoning changes
- From a brownfield remediation perspective, there are many redevelopment opportunities in the Study Area, though site assembly will be challenging

The remaining discussion focused on strategic elements of the BOA, speculation on how it would be used in the future in both Jamaica and at the State level and factors to be considered when selecting the redevelopment scenarios. The possibility of segmenting the existing BOA Study Area into smaller pieces for the purpose of expediting the project's progression to the implementation phase was raised by Curtis Cravens.

Factors discussed for the selection of the redevelopment scenarios included:

- the presence of junk yards
- location of illegal dumping
- potential for job creation

Donna Clopton suggested that the capacity of the school system and the availability of parking be considered in the design of any project.

### **MEETING SUMMARY - Meeting #3**

**Location:** Harvest Room  
90-40 160<sup>th</sup> Street  
Jamaica, NY 11432  
**Date:** November 19, 2007

**Attendees:**

Peter Engelbrecht	Greater Jamaica Development Corporation
Sean Garrigan	Consultant
Eliberty Jimenez	New York City Economic Development Corporation
Dana Kaplan	New York State Department of Environmental Conservation
Jim O'Neill	Real Estate Broker
Dan Pollay	Greater Jamaica Development Corporation
Yvonne Reddick	Community Board #12
Ben Sigman	Consultant
Dan Walsh	New York State Department of Environmental Conservation
Richard Werber	Greater Jamaica Development Corporation
Chris Woods	Consultant

Greater Jamaica Development Corporation hosted the third meeting of the Jamaica Brownfield Opportunity Area (BOA) Advisory Committee on November 19, 2007. The meeting served as both an update on the progress of the development of the BOA Nomination Study and as a question-and-answer session regarding the implementation of the Study's recommendations. A package of materials containing summaries of the previous two advisory committee meetings, a summary of the design workshop held in July 2007 and information on the BOA redevelopment strategies was distributed to meeting attendees.

Dan Pollay opened the discussion by summarizing the process of developing the Nomination Study from the kick-off of the project in May 2006. Mr. Pollay gave some background information on the results of the Study to date. He also laid out some of the pieces of information that were assembled and examined in formulating the redevelopment scenarios.

Ben Sigman, of Economics Research Associates and a member of the consulting team that produced the redevelopment scenarios, gave a brief summary of the characteristics of each of the five redevelopment sites chosen and his team's reasons for making the selected reuse recommendations. Sean Garrigan (Gannett Fleming) has been conducting the area/infrastructure analysis portion of the Nomination Study and described the

infrastructure recommendations that his firm is putting forward in conjunction with the redevelopment strategies.

Mr. Pollay concluded the discussion with a brief summary of the remaining elements of the Nomination Study, including the development feasibility analysis, the economic impact analysis and the Phase 1 Environmental Site Assessments (ESA). Regarding the ESAs, Dan Walsh reiterated the State's need to see both a strategy and a significant amount of information to review and approve applications for Phase 2 site assessment funding.

Mr. Walsh emphasized that the Project Team should narrow down the areas that have been identified through the planning process to a handful of sites where there are environmental issues. He strongly recommended that the BOA study area be segmented and that one portion of the study area be put forward for nomination first. He stated that the amount of State funding available for site assessment could be maximized with this approach, as several BOAs would result and could be put through the implementation phase of the BOA process simultaneously.

Mr. Pollay suggested that a separate meeting be organized with NYSDEC once the Phase 1 ESAs were completed. He indicated that he thought this would satisfy the requirement of developing a framework for selecting the sites that require Phase 2 funding. Mr. Walsh agreed that he thought such a meeting would be productive.