

## **A. INTRODUCTION**

The Proposed Project would result in the development of approximately 957,700 gross square feet of retail, 2,835 parking spaces, a 250-room hotel with a 30,000-square-foot banquet facility, and a public open space and waterfront esplanade totaling approximately two acres.

This chapter examines the potential effects of the Proposed Project on the socioeconomic conditions in the study area, including population and housing characteristics, economic activity, and the commercial real estate market. In accordance with the guidelines presented in the 2001 *City Environmental Quality Review (CEQR) Technical Manual*, this chapter evaluates five specific factors that could create substantial socioeconomic change in a study area: (1) direct displacement of residential population; (2) direct displacement of existing businesses and institutions; (3) indirect displacement of residential population; (4) indirect displacement of businesses and institutions; and (5) adverse effects on specific industries not necessarily tied to the project site or to the study area.

## **B. METHODOLOGY**

This chapter follows the preliminary and detailed assessment methodologies established in the 2001 *CEQR Technical Manual*. The analysis begins with a preliminary assessment that addresses the five principle issues of concern with respect to socioeconomic change outlined in the introduction above. The approach of the preliminary assessment is to learn enough about the effects of the Proposed Project either to rule out the possibility of significant adverse impact, or to determine that more detailed analysis would be required to resolve the question.

The detailed analysis section takes a more comprehensive examination of the effects of direct displacement and the potential for indirect displacement that may occur as a result of the Proposed Project. Each of the detailed analyses is framed in the context of existing conditions and evaluations of the future without the proposed actions and the probable impacts of the proposed actions in 2009 and 2014. In conjunction with the land use task, specific development projects that would occur in the area in the future without the Proposed Project are identified, as well as the likely changes in socioeconomic conditions that would result.

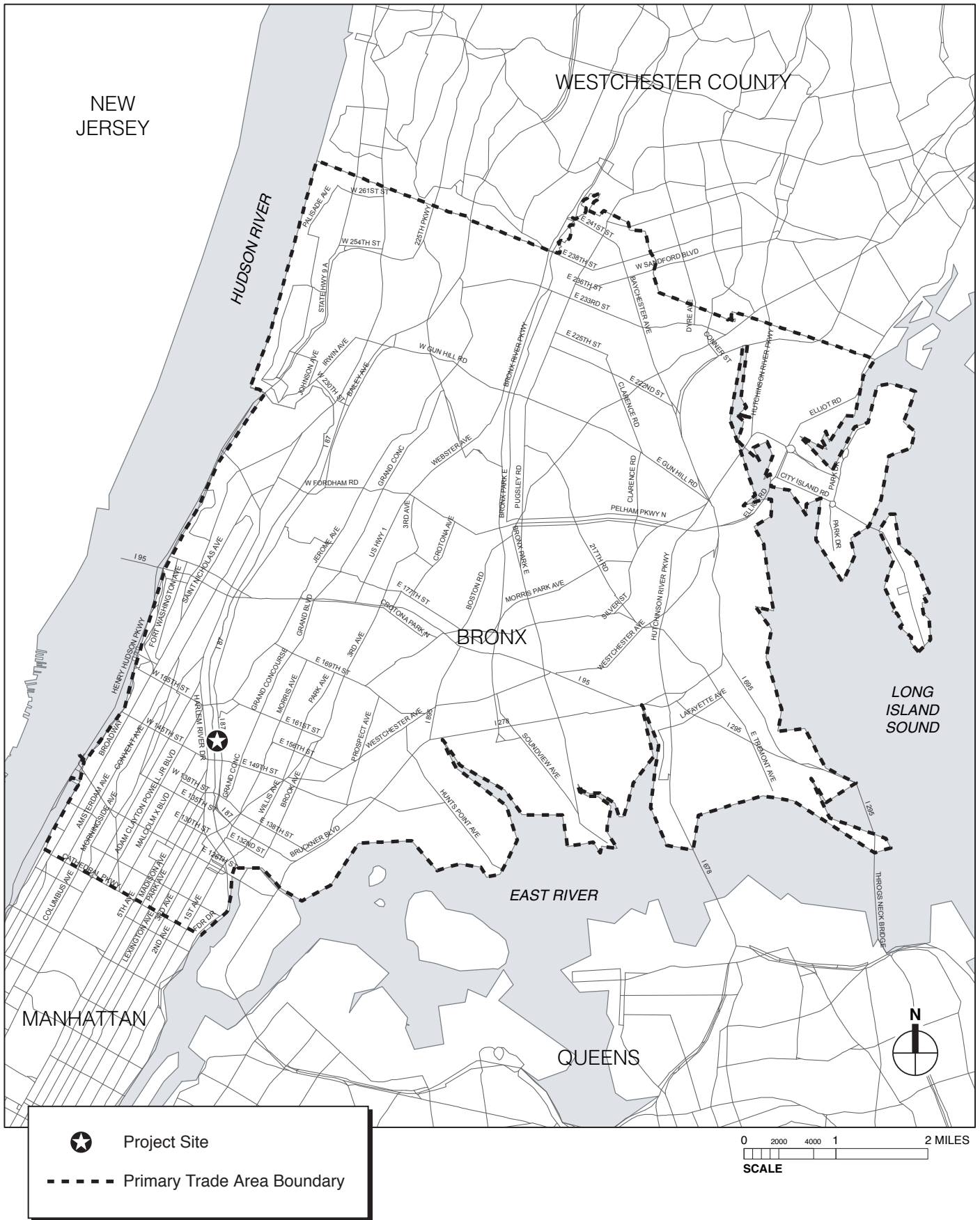
The detailed analyses are based on assumptions derived from the project description provided by the project sponsor. According to the project sponsor, the approximately 957,700 square feet of retail space planned under the proposed actions would include a mix of stores selling a variety of goods such as clothing, furniture, electronics, home improvement supplies, and groceries, as well as several restaurants and fast food places. As currently envisioned, the retail development would house approximately 4 large-scale retail stores totaling 576,137 gross square feet; 5 medium-scale retail stores totaling 324,717 gross square feet; and small-scale retail stores/restaurants totaling 56,857 gross square feet.

While specific tenants have not been identified, for purposes of providing a conservative analysis it is assumed that one of the large-scale stores would be a home improvement store, another large-scale store would be a wholesale club, and a third large-scale store would be a department store, while one of the medium-scale stores would be a supermarket. The home improvement store would sell products such as power tools, hand tools, lumber, electric and plumbing supplies, and outdoor furniture. The wholesale club would offer convenience goods such as food and beverages, paper goods, and personal products, as well as a variety of shopping goods products such as clothing, books, and jewelry. The department store would offer a variety of general merchandise typically including men's, women's and children's apparel, home furnishings, housewares, and small appliances. The selection of comparison goods may also include electronics, such as TV's and audio equipment, toys, and a limited offering of furniture. The supermarket is likely to offer a wide variety of fresh, frozen, and canned foods, including meats, fish, and produce, as well as bakery and dairy items, and housekeeping supplies such as paper products and cleaning aids. Comparing the number of stockkeeping units (SKU's) in a supermarket and a wholesale club indicates a significant difference in the selection of grocery items offered by these types of stores. For example, large supermarkets normally stock between 30,000 and 52,000 SKU's at any one time, while wholesale clubs carry an average of approximately 7,500 active SKU's. All analyses presented in this chapter are based on the assumption that the Proposed Project would include these four stores (a wholesale club, a home improvement store, a department store, and a supermarket totaling a combined 441,681 square feet) and approximately 24,890 square feet of restaurant or fast food space, and that the vast majority of the remaining space would be occupied by businesses selling shopping goods.

The study areas used in this chapter vary depending on the socioeconomic issue of concern. In terms of direct business displacement, the area of focus is the project site and the 23 businesses of the Bronx Terminal Market that would be displaced by the Proposed Project. The analysis describes their operational characteristics and relocation needs as well as their significance to the New York City economy.

In terms of indirect business and indirect residential displacement, one issue of concern is whether the Proposed Project's 957,700 gross square feet of retail could change socioeconomic conditions and property values in the immediate vicinity of the project site. Both of these analyses focus on a ¼-mile study area.

In addition to the potential effects on nearby property values, the Proposed Project could affect neighborhood shopping patterns in a wider area, which requires an analysis to address the possibility of indirect business displacement due to competition. As described in the *CEQR Technical Manual*, an analysis of the potential effects of competition should encompass a primary trade area from which the bulk of the new stores' sales are likely to be derived. As described in detail in Section D below, for purposes of analysis the "Primary Trade Area" for the Proposed Project is defined as the borough of the Bronx as well as Manhattan north of 110th Street (see Figure 3-1). In addition, there is an expectation that within this Primary Trade Area, the Proposed Project would draw a large portion of its repeat business from residents that live closest to the project site, as a result of more convenient access, shorter travel time and distance, and propensity to take advantage of a major shopping resource close to home. Those living farther from the Proposed Project would likely have a greater selection of large shopping resources in closer proximity to their homes. For this reason, the competition analysis focuses on both the Primary Trade Area and a smaller 3-mile area surrounding the project site, referred to as the "3-Mile Trade Area." The 3-Mile Trade Area includes the portion of Manhattan north of 110th Street and the portion of Bronx County roughly bounded by West and East Fordham Road



to the north, the Harlem River to the west, the East River to the south, and the Bronx River to the east (see Figure 3-2). The 3-Mile Trade Area spans several neighborhoods in Manhattan (Central Harlem, South Harlem, East Harlem, Washington Heights, and Inwood) and the Bronx (South Bronx and Central Bronx). The South Bronx includes neighborhoods south of the Cross Bronx Expressway, including Highbridge, Mount Eden, Concourse Village, Crotona Park East, Claremont, Morrisania, Bathgate, Longwood, Melrose, Mott Haven, Port Morris, and Hunts Point. Central Bronx covers the area north of the Cross Bronx Expressway and south of Gun Hill Road and includes Mount Hope, East Tremont, Bronx Park South, Tremont, Belmont, University Heights, Fordham, Bedford Park, Kingsbridge Heights, Norwood, and Van Cortlandt Village. The 3-Mile Trade Area includes all or portions of Manhattan Community Districts 9 through 12 and Bronx Community Districts 1 through 7. Once these trade areas were delineated, a profile of residents within the trade areas was prepared, including estimates of the current population and number of households and consumer expenditure potential.

Demographic and economic data were collected for the project area, the study areas, the borough, and New York City. Within the project area, field surveys were performed to identify businesses to be displaced. Field interviews and phone surveys of businesses potentially affected by displacement of the Bronx Terminal Market were conducted in May 2005. Within the ¼-mile study area, demographic characteristics such as population, number of households, median household income, median contract rent, and median house value were gathered from the 1990 and 2000 U.S. Census. Data were analyzed at the census tract level, or at the block group level where a census tract was not entirely within the study area boundary. Real Property Assessment Data (RPAD) were used to determine the number of rent-regulated units within the ¼-mile study area.

Profiles of the major retail concentrations within the 3-Mile Trade Area were prepared through detailed field surveys that indicate the number and types of stores in major retail strips and shopping centers. Retail sales and establishments data for the Primary Trade Area were obtained from the 2002 Census of Retail Trade. For the 3-Mile Trade Area, annual retail sales and number of establishments were estimated based on the 2002 Census of Retail Trade data, adjusted using data from Claritas, Inc., a national planning data service. Claritas data were used to determine the proportion of Primary Trade Area sales that occur within the 3-Mile Trade Area, and that proportion was applied to the Primary Trade Area sales figure from the 2002 Census of Retail Trade to derive estimated retail sales for the 3-Mile Trade Area. These sales data were reported for a variety of goods that correspond to the types of retail stores anticipated for the Proposed Project, including shopping goods<sup>1</sup>, convenience goods<sup>2</sup>, eating and drinking places, and building materials.

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<sup>1</sup> Shopping goods is a retail term referring to a variety of goods for which consumers generally travel farther to compare price, quality, and variety of merchandise. The types of goods typically included in the shopping goods category are general merchandise, apparel and accessories, home furnishings, furniture, and equipment, and miscellaneous shopping goods, including sporting goods, books, stationery, jewelry, hobbies, toys, games, cameras and photographic supplies, gifts, novelties, and souvenirs, luggage and leather goods, sewing needlework, piece goods, and optical goods.

<sup>2</sup> Convenience goods is a retail trade term referring to a variety of goods that typically do not require comparison shopping, but rather are more readily purchased in stores more convenient to home or work. Foods for home consumption, both fresh and frozen, as well as dry goods for home use, such as housekeeping supplies, make up the largest portion of convenience goods sales. These products are typically found in supermarkets, grocery stores, meat and fish markets, bakeries, fruit and vegetables markets, and candy and nut stores. The category also includes the sale of prescription and over-the-counter drugs, personal care items, and

These sales data were then compared to household expenditure data to determine current retail capture rates for the Primary and 3-Mile Trade Areas. The household expenditure data was obtained from Claritas, which generates the data using statistical models estimated from the most current Consumer Expenditure Survey (CEX) data from the Bureau of Labor Statistics. As explained in further detail below under the section titled “Indirect Business Displacement: Competition,” capture rates for the future without the Proposed Project were estimated based on retail or mixed-use projects known to be planned for the two trade areas. Annual sales for the planned retail establishments were estimated based on the characteristics of the projects and sales per square foot estimates as reported in the *Dollars & Cents of Shopping Centers: 2004*, Urban Land Institute. Future household expenditures were estimated based on current household spending data and future household growth, which was estimated using 2010 forecasts generated by the New York Metropolitan Transportation Council in 2004. Annual sales at the proposed Gateway Center were added to sales in the future without the Proposed Project to derive retail capture rates for the future with the Proposed Project. These Gateway Center sales were estimated based on per square foot sales data from the Urban Land Institute’s *Dollars & Cents of Shopping Centers: 2004*.

Information on commercial and residential rents within the study area were based on telephone interviews with local real estate brokers, as well as the classified sections of the *New York Times*, the *Daily News*, and the *New York Post*.

## **C. PRELIMINARY ASSESSMENT**

Under *CEQR Technical Manual* guidelines, the first step in a socioeconomic impact analysis is a preliminary assessment. This section examines each of the five areas of socioeconomic concern in relation to the Proposed Project. The goal of a preliminary assessment is to learn enough about the potential effects of Proposed Project either to rule out the possibility of significant impact, or to establish that a more detailed analysis would be required to determine whether the proposed actions would lead to significant adverse impacts.

For three of the five issue areas—direct residential displacement, indirect residential displacement, and adverse effects on specific industries—the preliminary assessment rules out the possibility that the Proposed Project would have a significant adverse impact. For the two remaining areas—direct and indirect business displacement—the preliminary assessment indicates that a more detailed analysis is necessary to adequately address whether the Proposed Project would have a significant adverse impact. The detailed analyses follow this preliminary assessment.

### **DIRECT RESIDENTIAL DISPLACEMENT**

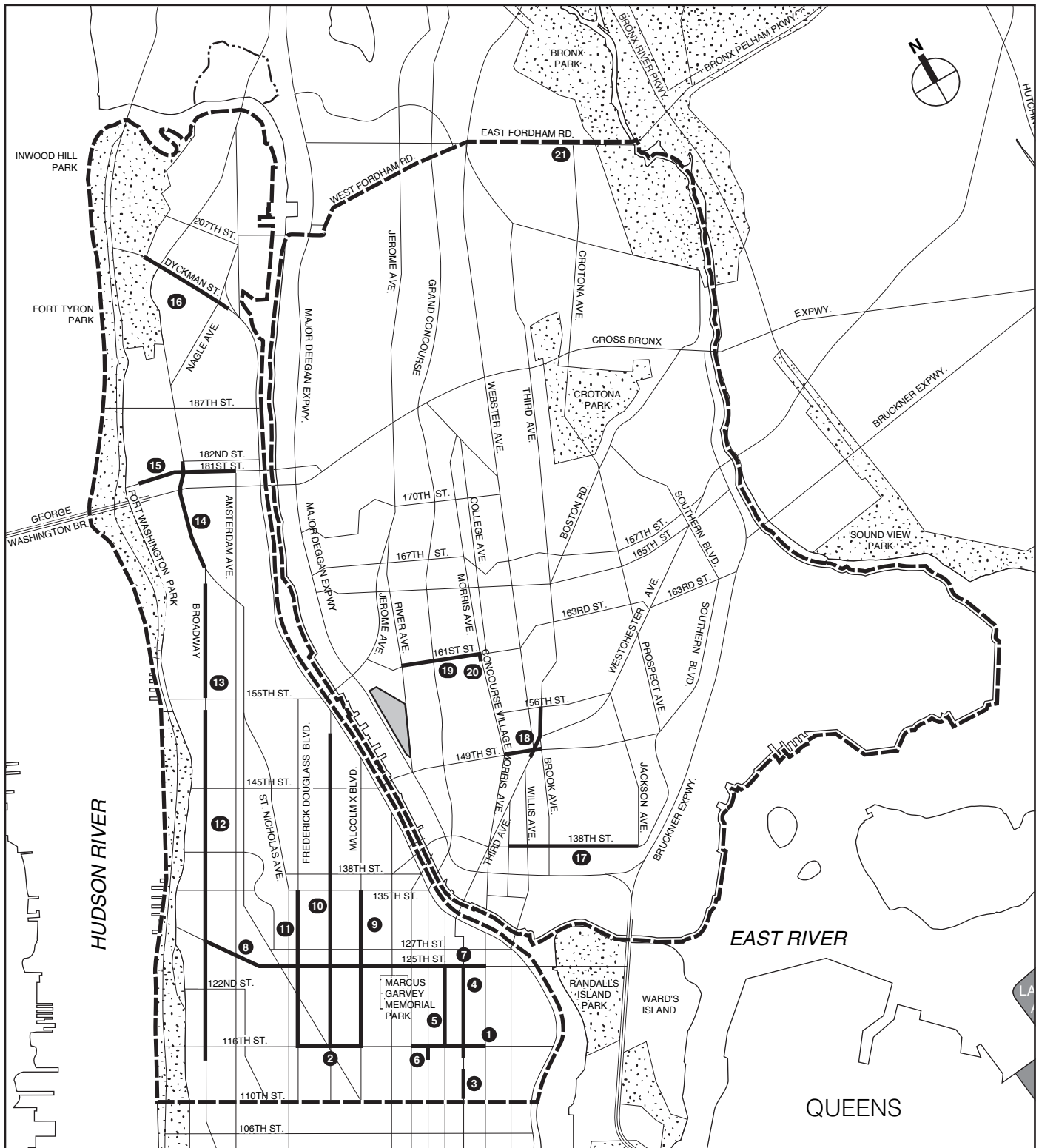
The project site currently contains no residential units. Therefore, the Proposed Project would not directly displace any residential population, and no further analysis of this issue is necessary.

### **DIRECT BUSINESS DISPLACEMENT**

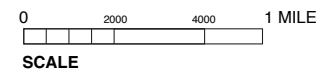
The *CEQR Technical Manual* defines direct business displacement as the involuntary displacement of businesses from the site of (or a site directly affected by) a proposed action. A

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health and beauty aids commonly found in neighborhoods drug stores. Tobacco products, newspapers and magazines, fresh flowers, and pet food supplies make up the remainder of the convenience goods category.



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|---|--|---|
|  <b>Project Site</b>               | <b>1 East 116th Street</b>                   | <b>11 Frederick Douglass Boulevard</b>  |
|  <b>3-Mile Trade Area Boundary</b> | <b>2 West 116th Street</b>                   | <b>12 Broadway (Manhattanville)</b>     |
|  <b>Retail Concentration</b>       | <b>3 Third Avenue South</b>                  | <b>13 Broadway (Hamilton Heights)</b>   |
|   | <b>4 Third Avenue North</b>                  | <b>14 Broadway (Washington Heights)</b> |
|   | <b>5 Lexington Avenue</b>                    | <b>15 West 181st Street</b>             |
|   | <b>6 La Marqueta</b>                         | <b>16 Dyckman Street</b>                |
|   | <b>7 East 125th Street</b>                   | <b>17 East 138th Street, BX</b>         |
|   | <b>8 West 125th Street</b>                   | <b>18 The Hub/149th Street, BX</b>      |
|   | <b>9 Malcolm X Boulevard</b>                 | <b>19 East 161st Street, BX</b>         |
|   | <b>10 Adam Clayton Powell, Jr. Boulevard</b> | <b>20 Concourse Plaza Mall, BX</b>      |
|   |  | <b>21 Fordham Road, BX</b>              |



preliminary assessment of direct business displacement looks at the employment and business value characteristics of the affected businesses to determine the significance of the potential impact. A significant direct displacement impact may occur if the businesses in question have substantial economic value to the City or region, are the subject of regulations or publicly adopted plans to preserve, enhance, or otherwise protect them, or substantially contribute to a defining element of the neighborhood character.

This preliminary assessment concludes that a detailed analysis is required to determine whether the Proposed Project would have a significant direct business displacement impact. Descriptions of the businesses subject to direct displacement, and the Citywide economic context in which those businesses operate, is presented later in this chapter under the detailed analysis.

This preliminary assessment is based on the screening criteria (in italics, below) presented in section 321.2 of the *CEQR Technical Manual*. According to the manual, a proposed action may have a significant direct business displacement impact if it meets the following criteria:

*If the businesses in question have substantial economic value to the City or regional area and can only be relocated with great difficulty or not at all.*

As set forth in the *CEQR Technical Manual*, the consideration of the economic value of a business is based on: (1) its products and services, (2) its location needs (particularly whether those needs can be satisfied at other locations), and (3) the potential effects on business or consumers of losing the displaced business as a product or service.

As shown in Table 3-3 under the detailed analysis, there were 23 businesses operating within the Bronx Terminal Market as of September 2004, 16 of which were located on the project site.<sup>1</sup> Almost all of the Bronx Terminal Market businesses are engaged in food wholesaling or sale of related restaurant or grocery products, such as paper goods and refrigeration equipment. In addition, there is one restaurant on the project site. The restaurant primarily serves employees working at the Bronx Terminal Market and truck drivers making deliveries or pick-ups. It is expected that the Proposed Project would directly displace all of the businesses within the Bronx Terminal Market. These 23 businesses employ approximately 297 workers, who would also be displaced.

The Proposed Project would also displace the Bronx House of Detention and an open air farmers' market. The displacement of the Bronx House of Detention—which is in reserve status, is currently closed, and employs a minimal number of people—would not have a socioeconomic impact on the study area or the City. Non-socioeconomic effects of this displacement are discussed in Chapter 4, “Community Facilities.”

The Proposed Project would also displace a wholesale farmers' market that operates up to six days a week in warmer months, and is used by approximately 20 farm operations. The farmers did not have a lease to operate on the project site and mostly sell plants, fruits, and vegetables to bodega owners, small grocery stores, and local residents as well as Bronx Terminal Market tenants. Because these farmers did not have a lease to operate on the project site, and because the farmers' market relocated in March 2005 to a nearby off-site location managed by the New York City Department of Parks and Recreation (NYCDPR) (i.e., Yankee Stadium parking lots 13A

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<sup>1</sup> As noted elsewhere in the FEIS, as of November 2005 there were 20 businesses operating within the Bronx Terminal Market, of which 13 were located on the project site. However, given that the 3 businesses that vacated did so in anticipation of the Proposed Project, for the purposes of analysis those businesses are included in the assessment of direct business displacement.

and 13B located along the Harlem River) and is now operating under a license agreement with NYCDPR, the impact of their displacement is not evaluated in this analysis.

With less than 0.2 percent of all employment involved in wholesale trade of nondurable goods, the 23 businesses and 297 workers subject to displacement do not represent a sizable proportion of wholesale trade employment in New York City. In addition, the Bronx Terminal Market employees do not represent a considerable proportion of total employment in the wholesale food industry in the City. According to 2004 employment data provided by Claritas, Inc., there are approximately 26,805 jobs in the wholesale food industry in New York City, and 24.2 percent of those (6,488) are located in the Bronx.<sup>1</sup> Excluding jobs at Bronx Terminal Market businesses that do not primarily sell food products (four jobs at A&S Refrigeration Equipment and six jobs at Bronx Tobacco and Candies), the Bronx Terminal Market employs 287 people working in the wholesale food industry. These 287 employees represent approximately 4.4 percent of all wholesale food employees working in the Bronx, and only 1.1 percent of wholesale food employees in New York City.

Individual food wholesalers are located throughout the City, but there are few official wholesale food market locations where clusters of food wholesalers can be found in close proximity to one another. Aside from the Bronx Terminal Market, there are only two other locations where such agglomerations of wholesale food-related businesses can be found: the New York City Terminal Produce Co-operative Market/Hunts Point Cooperative Market located in the Hunts Point In-Place Industrial Park (IPIP), and the Brooklyn Terminal Market. In addition, the Bronx Terminal Market contains several food wholesalers that sell specialty food items not commonly found in New York City. A discussion of those sales and the potential for significant adverse impacts resulting from displacement of these businesses at the Bronx Terminal Market location is provided in Section D, “Detailed Analysis.”

The second set of criteria for determining a business’ economic value is whether its location needs can be satisfied at other locations in the Bronx or New York City. The assessment considers the products sold by the displaced businesses, their locational needs, their customer base, and available properties in the Bronx. The third and final criterion to consider is the Proposed Project’s potential effects on businesses or consumers of losing the displaced business as a product or service. A large segment of the customer base for the Bronx Terminal Market businesses is comprised of restaurant and small grocery store owners in the south Bronx and across the river in Harlem and Washington Heights.

In conclusion, further detailed analyses are required to determine whether a change in location could have significant adverse impacts on the displaced businesses, or the customers and businesses served by the displaced businesses. See Section D, “Detailed Analysis.”

*If a category of businesses is the subject of other regulations or publicly adopted plans to preserve, enhance, or otherwise protect it.*

The businesses to be directly displaced by the Proposed Project are not subject to regulations or publicly-adopted plans to preserve, enhance, or protect them. The Bronx Waterfront Plan calls for increasing job opportunities for Bronx residents in general, not preserving jobs in the

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<sup>1</sup> Employment data presented for the wholesale food industry is based on data for businesses falling into the Standard Industrial Category for wholesale groceries and related products (SIC 514). This industry group includes establishments primarily engaged in the wholesale distribution of groceries, packaged frozen foods, dairy products, poultry products, fish and seafoods, meats and meat products, and fresh fruits and vegetables.



wholesale industry in particular. The Bronx Waterfront Plan (released by the Bronx Borough President's Office in March 2004) also supports the redevelopment of Bronx Terminal Market, including improved ferry access and a new waterfront open space.

*If the business or institution in question defines or contributes substantially to a defining element of neighborhood character or if a substantial number of businesses or employees would be displaced that collectively define the character of the neighborhood.*

The Bronx Terminal Market does contribute to the character of the neighborhood, but it does not define or substantially contribute to defining the neighborhood. There are many large institutional and entertainment uses within the ¼-mile study area that make as much of an imprint on the character of the neighborhood as does the Bronx Terminal Market. For example, Yankee Stadium, Hostos Community College, the Bronx General Post Office, and Cardinal Hayes High School are all located within a quarter mile of the Bronx Terminal Market.

### **INDIRECT RESIDENTIAL DISPLACEMENT**

Indirect residential displacement is the involuntary displacement of residents that results from a change in socioeconomic conditions created by the Proposed Project. In most cases, the issue for indirect residential displacement is that an action would increase property values, leading to higher rents throughout the study area, making it difficult for some residents to afford their homes. This preliminary assessment is based on the screening criteria outlined in the *CEQR Technical Manual*, which describe circumstances that can generate potentially significant impacts. The criteria are presented (in italics) and responded to below.

*If the Proposed Project would add a substantial new population with different socioeconomic characteristics compared to the size and character of the existing population.*

### **DEMOGRAPHIC PROFILE**

As shown in Table 3-1, the ¼-mile study area experienced a 10 percent decrease in total population between 1990 (11,059 residents) and 2000 (9,950 residents), with much of the population decrease (20 percent) occurring in the Manhattan portion of the study area. In contrast, the population increased in the Bronx (11 percent), New York City (9 percent), and Manhattan (3 percent) between 1990 and 2000. The number of total households within the ¼-mile study area reflects changes similar to the total population. Overall, total households in the study area decreased by almost 10 percent between 1990 and 2000 with the Manhattan portion of the study area experiencing a 17 percent decrease in total households compared to a less than one percent decrease in the Bronx portion. Bronx County had a 9 percent increase in total households, followed by New York City and Manhattan with 7 and 3 percents respectively.

The 1999 median household income in the ¼-mile study area was approximately \$23,277 per year compared to \$27,775 per year in 1989—a decrease of over 16 percent. Within the ¼-mile study area, the Manhattan portion experienced a substantial decline in median household income between 1989 and 1999 with a decrease of almost 28 percent compared to a 1.1 percent increase in median household income in the Bronx portion. The median household income decreased in Bronx County as a whole (-7.2 percent), and New York City (-5.3 percent), but increased in Manhattan (7.6 percent). The 1999 median household income in the ¼-mile study area (\$23,277 per year) was lower than Bronx County (\$27,611 per year), Manhattan (\$47,030 per year) and New York City (\$38,293 per year).

**Table 3-1**  
**Demographic Characteristics of ¼-Mile Study Area**

	Total Population			Total Households			Median Household Income		
	1990	2000	% Change	1990	2000	% Change	1989	1999	% Change
Bronx Portion of Study Area	6,202	6,076	-2.0	2,017	2,001	-0.8	\$23,890	\$24,142	1.1
Manhattan Portion of Study Area	4,857	3,873	-20.3	2,422	2,011	-17.0	\$31,012	\$22,416	-27.7
¼-Mile Study Area	11,059	9,949	-10.0	4,439	4,012	-9.6	\$27,775	\$23,277	-16.2
Bronx County	1,203,789	1,332,650	10.7	424,112	463,212	9.2	\$29,740	\$27,611	-7.2
Manhattan	1,487,536	1,537,195	3.3	716,422	738,644	3.1	\$43,724	\$47,030	7.6
New York City	7,322,564	8,008,278	9.4	2,819,401	3,021,588	7.2	\$40,419	\$38,293	-5.3
<b>Notes:</b> 1989 median household income is presented in constant 1999 dollars.									
<b>Sources:</b> 1990 and 2000 U.S. Census, Summary File 1 and Summary File 3.									

The Proposed Project does not have a residential component. Therefore, the Proposed Project would not add a new residential population with different socioeconomic characteristics.

*It would directly displace uses or properties that have had a “blighting” effect on property values in the area.*

The project site and the existing uses on the project site have not had a blighting effect on residential property values in the area. As shown in Table 3-2, median contract rent in the ¼-mile study area has not changed substantially between 1990 and 2000, with a decrease of only 1.1 percent over the decade. Over the same time period, median contract rent in Bronx County and New York City increased by 2.2 percent and 10.8 percent, respectively. The median contract rent in the ¼-mile study area and Bronx County was almost identical in 2000 while median rent for New York City as a whole was 31.7 percent higher than the median for the study area.

**Table 3-2**  
**Median Contract Rent in the ¼-Mile Study Area**

	1990 Median Contract Rent	2000 Median Contract Rent	Percent Change	2000 Median Housing Value
¼-Mile Study Area	\$568	\$562	-1.1	\$54,325
Bronx County	\$548	\$560	2.2	\$183,800
New York City	\$668	\$740	10.8	\$221,200
<b>Note:</b> 1990 median contract rent is presented in constant 2000 dollars.				
<b>Source:</b> U.S. Census Bureau, 1990 and 2000 Census, Summary File 1 and Summary File 3.				

The 2000 median contract rent in the study area was compared to three other similar neighborhoods surrounding the ¼-mile boundary: Mott Haven, Highbridge, and Concourse. Mott Haven is a neighborhood located southeast of the study area where the median contract rent in 2000 was approximately \$324 per month (\$238 per month less than contract rents in the study area). Just north of the study area is Highbridge where the 2000 median contract rent was \$492 compared to \$562 in the study area, or \$70 per month less than in the study area. Finally, median contract rents in the Concourse neighborhood, which is just northeast of the study area, were slightly higher than the study area (\$569 compared to \$562 per month).

Based on telephone interviews with several local residential brokers in Mott Haven and along the Grand Concourse,<sup>1</sup> current rents within the study area do not differ significantly from the surrounding areas. For example, rents for a one bedroom apartment in the study area, as well as Mott Haven, Highbridge, and Concourse range from \$800 to \$1,000 per month depending on the size. Likewise, a two bedroom apartment in all four neighborhoods rents from \$1,100 to \$1,200 per month, while a three bedroom is \$1,350 and above.

In addition, as described in detail below, physical barriers such as the Metro North Rail Road tracks, Yankee Stadium, and changes in topography isolate the project site from the study area's residential neighborhoods. The isolation makes it unlikely that existing uses on the project site have had a blighting effect on the residential property values within the ¼-mile study area.

Considering that rents in the study area are similar to other neighborhoods bordering the ¼-mile boundary, and that there are physical barriers that separate the project site from residential areas, it appears that the presence of the Bronx Terminal Market has not had a blighting effect on the value of residential properties in the study area, and no further analysis is necessary.

*It would directly displace enough of one or more components of the population to alter the socioeconomic composition of the study area.*

Given that there is no housing on the project site, the Proposed Project would not directly displace any residents, and thus would not alter the socioeconomic composition of the study area.

*It introduces a more costly type of housing compared to existing housing and housing expected to be built in the study area by the time the project is implemented.*

The Proposed Project would not introduce new housing to the area.

*It would introduce a "critical mass" of non residential uses such that the surrounding area becomes more attractive as a residential neighborhood complex.*

The Proposed Project would introduce a critical mass of non-residential uses to the study area, including retail stores and a hotel. Such a new use could potentially make a neighborhood more attractive, thereby increasing existing rents for current residents or creating a climate for new higher-income residential development which could indirectly displace existing residents. However, the Proposed Project is not expected to make the surrounding neighborhood (within the ¼-mile study area) more attractive for residential use. First, the project site is relatively isolated from the residential areas within the study area. Existing residential buildings located north of the project site are separated from the project site by the Metro North Rail Road tracks and Yankee Stadium. Residential concentrations to the east of the project site along Walton Avenue are separated from the project site by an approximately 29-foot change in grade between Exterior Street and River Avenue. The above-mentioned physical and natural barriers together help to create a residential environment that is separate and distinct from the project site.

Second, the ¼-mile study area is fully developed with no vacant land available for redevelopment, and zoning regulations in the manufacturing areas restrict as-of-right residential development or conversions without a discretionary action from the New York City Department of City Planning (NYCDCP). Finally, many of the residential units within the study area are

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<sup>1</sup> Real estate brokers were all located in the South Bronx with much of their residential real estate business focusing on Mott Haven, Highbridge, and the Concourse.

owner-occupied, rent-regulated, public housing, or publicly assisted housing, which means their tenants would not be affected by potential increases in market rate rents. For example, according to data collected from 2003 Real Property Assessment Data (RPAD), of the 6,210 residential units in the ¼-mile study area, approximately 42 percent (2,607 units) are owner-occupied cooperative units, which are not subject to rental increases, and approximately 47 percent (2,902 units) are rent-stabilized units, which mean they are protected from any significant rental increases. Another 9 percent (576 units) are under the control of the New York City Housing Authority (NYCHA), which means residents are protected against real estate market pressures and potential increases in property values and rents. In total, approximately 98 percent of the residential units found in the ¼-mile study area are protected against any unregulated or market-driven rental increases.

The residential real estate market in neighborhoods outside of the ¼-mile study area would not be affected by the Proposed Project. The closest residential concentration outside of the ¼-mile study area is to the north of the project site—an area bounded by Grand Concourse to the east, East 161st Street to the south, the Harlem River to the west, and East 166th Street to the north. That area is separated from the project area by Macombs Dam Park and John Mullaly Park as well as physical boundaries such as a rising slope that begins at Jerome Avenue and becomes increasingly steeper as you go further northwest from the ¼-mile study area. In addition, similar to residential conditions in the ¼-mile study area, many of the residential units to the north of the study area are rent-regulated, which affords those units protection from potential rent increases. According to RPAD, approximately 85 percent (5,760 units) of the 6,786 residential units are rent-stabilized and another 8 percent (535 units) are owner-occupied cooperative units. In addition to the rent stabilized and owner-occupied units, approximately 2 percent (or 134 units) of the total residential units are NYCHA properties. With almost 95 percent of the total residential units protected from any significant rental increases, the residential concentration to the north would not be subject to indirect residential displacement.

The approximately 250,000 gsf hotel with 250 rooms, a 30,000 gsf banquet facility, and approximately 225 parking spaces would also introduce a critical mass of a non-residential use to the study area. However, the existence of a hotel would not increase current residential rents, nor would it influence other new higher-income residential developments to occur in the study area.

*It would introduce a land use that could have a similar indirect effect if it is large enough or prominent enough or combines with other like uses to create a critical mass large enough to offset positive trends in the study area, to impede efforts to attract investment to the area, or to create a climate for disinvestment.*

In the future without the Proposed Project, there are a number of projects planned for the area surrounding the project site. The New York Yankees recently announced plans to invest approximately \$700 million to build a new Yankee Stadium within Macombs Dam Park, directly north of the current Yankee Stadium. As mentioned in Chapter 2, “Land Use, Zoning, and Public Policy,” there are several infrastructure projects planned that will improve access to the study area, including the widening of the Major Deegan Expressway, reconstruction of 149th Street between Griffin Place and Exterior Street, the connection of East 153rd Street between Grand Concourse and Park Avenue by a bridge over the Metro North Rail Road tracks, and the potential creation of a Metro North Rail Road station in the project area. The New York City Department of Homeless Services (NYCDHS) has plans for a new Emergency Assistance Unit at 151st Street and Walton Avenue to replace the existing facility at this location. Just southeast

of the project site, Hostos Community College is currently renovating a 125,000 gross square foot academic building over the next four to five years. In addition, the school has future capital improvement projects that are pending budget allocation. Lincoln Hospital has several capital improvement projects that are currently in construction, including a \$6 million labor and delivery center (30,000 sf) and a \$2 million MRI unit (2,000 sf). Other improvements that are in the planning and/or design phase include a \$10 million redesign of the emergency room, a new \$1 million women's option center (2,000 sf), and a \$1 million upgrade of the existing 650-space parking garage facility. Finally, the New York City School Construction Authority (SCA) has proposed the construction of an approximately 275,000 gross square foot, 2,300-seat school complex on the northeast corner of Concourse Village West and East 153rd Street, just north of the planned East 153rd Street Bridge. The proposed school complex would house four school organizations, including a charter school serving grades 5 through 8, an intermediate school/high school (I.S./H.S.) serving grades 6 through 12, and two high schools serving grades 9 through 12. It is expected that the school complex would be ready for occupancy by September 2009. All of these projects indicate ongoing investment in the study area that will occur independent of the Proposed Project.

The Proposed Project would not impede efforts to attract investments to the area or create a climate for disinvestment. To the contrary, the Proposed Project would add to the ongoing improvements described above by replacing underutilized and dilapidated buildings with a major retail center, new waterfront public open space, and the only hotel in this area of this city. The Proposed Project would create new employment opportunities for local residents, and would provide convenient shopping and dining opportunities. In addition, it is anticipated that the City, with contributions from the project sponsor, would develop a portion of the area west of Exterior Street with a 2-acre public open space, which would serve the surrounding neighborhood and create public recreational access to the Harlem River. The City is committed to developing the off-site public open space by the Proposed Project's 2009 Build year. The programming of this open space and the actions required for its development are yet to be determined.

### **INDIRECT BUSINESS AND INSTITUTIONAL DISPLACEMENT**

Indirect business and institutional displacement is the involuntary displacement of businesses or institutions that results from a change in socioeconomic conditions created by a proposed action. Similar to indirect residential displacement, the issue for indirect business displacement is that an action would increase property values and, indirectly, rents in the study area, making it difficult for some categories of business or institutions to remain at their current locations. The preliminary assessment is based on the screening criteria outlined in the *CEQR Technical Manual*. These criteria are presented (in italics) and responded to below.

*It introduces enough of a new economic activity to alter existing economic patterns.*

As described above, the Proposed Project is expected to introduce approximately 957,700 gross square feet of new retail development into a ¼-mile study area that is predominately industrial in character. The Proposed Project would introduce enough of a new economic activity (retail) and would be large enough in size to potentially alter existing economic patterns. The potential issue is that the Proposed Project could indirectly displace existing businesses or institutions within the ¼-mile study area by increasing rents and possibly creating a trend towards conversion to retail uses in the area. Therefore, a detailed analysis is required to examine any potential impacts.

*Adds to the concentration of a particular sector of the local economy enough to alter or accelerate an ongoing trend to alter existing economic patterns.*

Because the Proposed Project is expected to add approximately 957,700 square feet of new retail uses on the project site, it could potentially alter existing economic patterns, specifically existing concentrations of retail shopping in a 3-mile study area, which includes 116th Street and 125th Street in Manhattan and 138th Street, Fordham Road, The Hub, and Concourse Plaza in the Bronx. Therefore, a detailed analysis is required.

*Displaces uses or properties that have had a “blighting” effect on commercial property values in the area, leading to rises in commercial rents.*

Although the Bronx Terminal Market contains some vacant structures and is at times unsightly because of trash generated by its operations, it has not had a “blighting” effect on commercial property values in the ¼-mile study area. Retail businesses along 149th Street and the Grand Concourse include a mix of convenience retail stores and neighborhood services such as groceries, dry cleaners, and restaurants that cater to local residents as well as students and employees from Hostos Community College and the post office. According to CB Richard Ellis, a commercial real estate company, commercial rents in the study area along the Grand Concourse and 149th Street range from \$25 to \$45 per square feet for ground floor retail space, and are comparable to other retail locations outside the ¼-mile study area such as the 138th Street and 149th Street retail corridors.

Similarly, Newmark Real Estate Services estimates commercial rents in the ¼-mile study area to be about \$25 per square foot for ground floor space less than 5,000 square feet, and \$20 per square feet for commercial space between 5,000 to 10,000 square feet. According to Newmark, the commercial rents cited above are similar to other commercial rents outside the ¼-mile study area such as 138th Street.

According to real estate firm Kalmon Dolgin, industrial rents in the ¼-mile study area have increased over the past few years and currently stand at approximately \$10-\$12 per square foot for ground floor space with 18 foot ceilings. Industrial rents in the ¼-mile study area tend to be slightly higher than similar industrial space in Mott Haven or Hunts Point due to their proximity to Manhattan.

Based on discussions with industrial and retail brokers familiar with properties within the study area, the Bronx Terminal Market has not had a blighting effect on existing industrial and commercial properties. While the Proposed Project would improve the aesthetics of the area and create a more attractive physical environment, it is unlikely to result in significant increases in industrial rents in the area which, as noted above, are already at the top of the market and higher than rents in nearby industrial districts. Therefore, a detailed analysis of this issue is not required.

*Directly displaces uses of any type that directly support businesses in the area or bring people to the area that form a customer base for local businesses.*

The Proposed Project would not directly displace uses that directly support local businesses. The study area is predominately industrial with many of the existing manufacturing businesses involved in work that is unrelated to uses found in the Bronx Terminal Market. The Proposed Project also would not directly displace uses that bring people to the area that form the customer base for local area businesses. The businesses on the project site typically attract customers that operate restaurants, grocery stores, and other food-related businesses, as well as truck drivers

delivering food and food-related products to the wholesale merchants. Most of the customers and truckers do not remain in the study area long enough to form a customer base for other local businesses. In addition, the Proposed Project would create a new customer base of employees and visitors that could potentially benefit the existing retail businesses in the study area. Therefore, a detailed analysis of this issue is not required.

*Directly or indirectly displaces residents, workers, or visitors who form the customer base of existing businesses in the area.*

As discussed in the direct displacement analysis, the Proposed Project is expected to directly displace 297 employees from the Bronx Terminal Market. However, the Proposed Project is expected to add 1,921 jobs to the study area. Accounting for the 297 jobs that would be directly displaced, the Proposed Project would add approximately 1,469 more jobs in 2009 and 1,624 in 2014 to the study area, compared to the future without the Proposed Project. As a result, the Proposed Project is not expected to have any significant adverse impact on the customer base of the study area. In fact, the Proposed Project could potentially have positive impacts by increasing the customer base for local businesses.

*Introduces a land use that could have a similar indirect effect, through the lowering of property values if it is large enough to create a critical mass large enough to offset positive trends in the study area, to impede efforts to attract investment to the area, or to create a climate for disinvestment.*

Although the Proposed Project is large enough to create critical mass, it would not offset positive trends in the study area, impede any efforts to attract investment, or create a climate for disinvestment. As previously mentioned in the preliminary assessment on indirect residential displacement, the study area is currently attracting potential new investment by the New York Yankees to build an estimated \$700 million new stadium and recreational facility as well as infrastructure improvements that will upgrade existing streets, sidewalks, and curbs for better vehicular and pedestrian access. NYCDHS has plans for a new Emergency Assistance Unit at 151st Street and Walton Avenue to replace the existing facility at this location. Hostos Community College is currently renovating a 125,000 gross square foot academic building over the next four to five years, and the school has future capital improvement projects that are pending budget allocation. The New York City School Construction Authority (SCA) has proposed the construction of an approximately 275,000 gross square foot, 2,300-seat school complex on the northeast corner of Concourse Village West and East 153rd Street. Finally, outside of the study area, Lincoln Hospital has several capital improvement projects that are currently in construction such as a \$6 million labor and delivery center (30,000 sf) and a \$2 million MRI unit (2,000 sf). Other improvements that are in the planning and/or design phase include a \$10 million redesign of the emergency room, a new \$1 million women's option center (2,000 sf), and a \$1 million upgrade of the existing 650-space parking garage facility.

Along with the projects described above, the development planned under the Proposed Project would contribute to supporting the economic revitalization of the West Haven neighborhood of the Bronx. The Proposed Project would replace underutilized and dilapidated buildings with a major retail center and the only hotel in this area of this city. The Proposed Project would create new employment opportunities, convenient shopping and dining opportunities, and create economic and fiscal benefits to the City in the form of economic revitalization and tax revenue.

## **ADVERSE EFFECTS ON SPECIFIC INDUSTRIES**

According to the *CEQR Technical Manual*, a significant adverse impact may occur if an action affects the operation and viability of a specific industry that has substantial economic value to the City's economy.

*Would the action significantly affect business conditions, reduce employment or impair the economic viability in any industry or any category of businesses within or outside the study area.*

The Proposed Project would not substantially reduce employment in the wholesale food industry. Although the businesses on the project site would be displaced, they could relocate to other locations within the Bronx or New York City without significantly reducing total employment in the wholesale food industry (see the section below for further detail on available industrial properties in the Bronx).

The Proposed Project also would not impair the economic viability of the wholesale food industry in the Bronx or New York City as a whole. As mentioned in the preliminary analysis of direct business displacement, the businesses to be displaced currently employ approximately 287 wholesale food industry workers, who represent only 4 percent of all wholesale food employees in the Bronx and roughly 1 percent of wholesale food employees in New York City. All of the products sold at the Bronx Terminal Market, including West African specialty food items, are available through other wholesale distributors and retailers in New York City that do not depend solely on the Bronx Terminal Market for their supply, as well as through two major wholesalers in New Jersey (one of which supplies the Bronx Terminal Market). More important, the Hunts Point IPIP is home to the Hunts Point Cooperative Market (wholesale meat), the Hunts Point Terminal Market (wholesale produce) and the recently-opened Hunts Point Fish Market. Together, they make up the Hunts Point Food Distribution Center, which currently supplies approximately 90 percent of New York City's food supply. The wholesale produce market alone supplies 55 percent of the New York City's produce needs.<sup>1</sup>

Annual sales generated by the Hunts Point Food Distribution Center is approximately \$3 billion—\$1 billion per year from the meat market and \$2 billion from the produce market. The \$3 billion in annual sales at Hunts Point represents approximately 65.2 percent of the \$4.6 billion in wholesale food industry sales for New York City. The addition of the fish market will generate another \$1 billion per year in sales, increasing the Hunts Point Food Distribution Center's share of New York City total wholesale food industry sales to 87 percent.

With approximately 65 percent of New York City's food supply coming through the Hunts Point Food Distribution Center, the loss of the Bronx Terminal Market as a wholesale food market center would not significantly impact business conditions or the economic viability of the wholesale food industry in New York City. Therefore, a detailed analysis is not required.

## **D. DETAILED ANALYSIS**

The possibility that the Proposed Project could cause significant impacts through direct or indirect business displacement could not be ruled out through the preliminary assessment presented above in Section C. Therefore, a detailed analysis for those areas of concern is

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<sup>1</sup> Information based on telephone conversation with Myra Gordon, Executive Administrative Director for the New York City Terminal Produce Cooperative Market on March 22, 2005.



presented below. In accordance with CEQR guidelines, the detailed analyses are divided into three sections: existing conditions, the future without the proposed actions, and the probable impacts of the proposed actions, which includes a determination about whether the Proposed Project would cause significant adverse impacts.

### **DIRECT BUSINESS DISPLACEMENT**

For the Proposed Project, a detailed analysis of direct business displacement was deemed necessary because the preliminary analysis did not rule out the possibility that the businesses to be displaced are of substantial economic value to the city or the regional area and they could only be relocated with great difficulty or not at all. Existing conditions at the Bronx Terminal Market and in the study area are described below, followed by a description of the area in the future without the proposed actions. This scenario is then compared to the future with the proposed actions to determine how the displaced businesses and broader business community would be affected, and whether their displacement would constitute a significant adverse impact.

#### *EXISTING CONDITIONS*

##### *Businesses at Bronx Terminal Market*

As indicated in the preliminary analysis, there were 23 businesses currently operating within the Bronx Terminal Market as of September 2004, and almost all of them are engaged in food wholesaling or the sale of related restaurant or grocery products, such as paper goods or refrigeration equipment. In addition to selling wholesale food products, some of the Bronx Terminal Market merchants also engage in retail operations, selling food products to residents primarily from northern Manhattan and the South Bronx. There is also one restaurant on the project site that primarily serves Bronx Terminal Market employees and truck drivers making deliveries or pick-ups. As shown in Table 3-3, these businesses employed approximately 297 workers and leased approximately 396,930 square feet of space.

##### *Operational Characteristics and Location Needs*

Stores in the Bronx Terminal Market range in size from 985 square feet to 52,250 square feet. Only six of the businesses occupy over 20,000 square feet of space. According to property lease information provided by BTM Development Partners, rental rates in the market range from \$6.00 per square foot (psf) to \$9.75 psf and the average rental rate is \$7.60 psf. However, some businesses are occupying space in addition to what is specified in their leases (generally second floor space used for storage), lowering effective per square foot rental rates. Per square foot rental rates based on actual amount of space occupied, as opposed to leased space, range from \$4.00 psf to \$9.50 psf and average about \$6.50 psf. These rental rates are lower than the averages for other industrial space in the Bronx and other boroughs. For example, rents at the Hunts Point and Bathgate IPIPs in the Bronx range from \$7 to \$10 psf and \$7 to \$11 psf, respectively, and rents at the Jamaica IPIP in eastern Queens range from \$8 to \$15 psf.

The Bronx Terminal Market tenants operate either without leases, on month-to-month leases, or leases with termination clauses in the event of redevelopment of the market. As shown in Table 3-3, approximately 14 out of the 23 businesses (61 percent) occupy space that is greater than 10,000 square feet. Some of the larger employers such as NY Produce, Cuba Tropical, Siegmund Strauss Inc., and C. Kenneth Imports occupy space that is more than 30,000 square feet.

**Table 3-3**

**Businesses Subject to Direct Displacement Under Proposed Project**

<b>Name of Business</b>	<b>Type of Business</b>	<b>Number of Employees</b>	<b>Square Feet of Space Leased</b>
A&S Refrigeration Equipment	Refrigeration equipment	4	6,000
African Market	African & Caribbean Food Products	10	11,960
Bronx Tobacco & Candies Company, Inc.	Wholesale Tobacco	6	8,400
C. Kenneth Imports	Food Distributor	30	52,250
7 Ounce, Inc. (aka Caribbean Produce)	Tropical produce & grocery	6	18,000
Cuba Tropical	Produce	40	50,000
Falcon Crest Food Distribution	Food Distributor	10	30,000
Gold Coast Trading Company	Wholesale African, American & West Indian foods	5	6,000
International Market	African, Caribbean, American Products	6	6,000
K&K African Market	African & Caribbean food products	3	6,000
L&S Fruit & Produce	Fruit & Produce	3	12,000
La Ruche Imports, Inc.	Importer & wholesaler of African foods	2	6,000
Latin 17 Meat & Provisions Corp.	Meat & Groceries	42 (combined with Latin Tropicales)	11,200
Latin Tropicales, Inc.	Wholesale fruits, vegetable & groceries	42 (combined with Latin 17)	12,000
Nasem African Market	Wholesale African & Caribbean market	6	12,000
NY Produce*	Import and Distribute fruits & vegetables	50	49,265
PJ's Warehouse, Inc.	Paper goods, produce & frozen foods	12	9,600
Pronto Produce Inc. (aka New Renacer Produce)	Fruits, vegetables & tropical products	7	6,000
Sal's Wholesale Produce	Fruits, vegetables	2	985
Siegmund Strauss Inc.	Wholesale meats	25	30,000
Trombetta & Sons Inc.	Produce	6	18,000
V&S Products (aka MS Products Co.)	Tropical fruits, vegetables & groceries	12	12,000
Victory Food Service Distribution Corp.	Food distributor	10	<u>23,270</u>
<b>Total</b>		<b>297</b>	<b><u>396,930</u></b>
<b>Note:</b> * Tropical Café Restaurant also operated by NY Produce.			
<b>Source:</b> Information provided by BTM Development Partners survey conducted in September 2004.			

The customer base for the businesses located in the Bronx Terminal Market largely consists of restaurants and small grocery stores in Harlem, Washington Heights, and the South Bronx, as well as West African, Caribbean, and Hispanic residents who live within the 1/4-mile study area and the larger metropolitan area. These restaurants and stores cater to the ethnically diverse populations of Harlem, Washington Heights, and the Bronx that purchase African, Caribbean, and Latin American meats, fish, and vegetables offered at the market. For example, Bronx Terminal Market merchants specializing in African food products cater to the Ghanain, Senegalese, and Nigerian restaurants located along West 116th and 125th Streets in Harlem with traditional food items such as fufu mix, palm oil, kola nuts, and cassava. Similarly, Hispanic merchants carry food products that supply the Caribbean and Hispanic population throughout northern Manhattan and the Bronx. The one-stop-shopping convenience provided by the

clustering of wholesale food businesses is part of what continues to draw customers to the Bronx Terminal Market.

Another operating characteristic of businesses in the Bronx Terminal Market is convenient vehicular access from both the Bronx and Manhattan. Customers coming from northern Manhattan can cross the Harlem River using one of the six bridges between 125th and 181st Streets, joining local streets or the Major Deegan Expressway to access the market. Customers from the Bronx also have convenient access to the market via local streets or from the Expressway ramps at the northern and southern ends of the market. Once customers enter into the market area, they can drive their trucks or cars directly to the loading docks or into parking areas without entrance fees or security checks.

#### *Effect on New York City's Economy*

As previously discussed in the preliminary assessment for direct business displacement, total wholesale food industry employment in the Bronx Terminal Market represent approximately 4 percent of all wholesale food employees in the Bronx and only 1 percent of wholesale food employees in New York City. Therefore, in terms of the number of jobs and related payroll, the businesses to be displaced do not have a substantial economic value to the City.

#### *Relocation Options*

All of the businesses within the Bronx Terminal Market occupy ground floor space that allows them to load and unload their goods. (They also utilize second floor space, generally for storage.) Therefore, any comparable alternatives would also need to include ground-floor space. As shown in Table 3-4, as of March 2005 there was approximately 472,500 sf of ground-floor industrial space available throughout the Bronx.<sup>1</sup> The monthly rents for the available properties range between \$5 and \$16 per square foot (psf) for buildings that are between 6,000 and 90,000 square feet in size. Of the 472,500 sf available, slightly more than half was located in or near the Bronx Empowerment Zone and/or the New York State Economic Development Zone (see Figure 3-3).

Approximately 100,000 sf of the industrial space listed in Table 3-4 is within the Hunts Point In-Place Industrial Park (IPIP). The Hunts Point IPIP, which is located in the Hunts Point section of the Bronx, is an industrial park that includes roughly 800 businesses and approximately 25,000 employees. Although some of the monthly rents listed are negotiable, they range from \$6.75 to \$8.59 per square foot.

The Port Morris In-Place Industrial Park (IPIP) is located south of 138th Street and north of the East River. Approximately two miles southeast of the Bronx Terminal Market, the Port Morris IPIP is easily accessible from the Major Deegan Expressway and the Bruckner Expressway. Of the available industrial properties listed in Table 3-4, almost 150,000 square feet is located within the boundaries of the Port Morris IPIP. Monthly rents for ground-floor space range from \$5 to \$16 per square foot.

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<sup>1</sup> Additional data on available industrial space in the Bronx was provided by another source, CoStar, in November 2005. According to CoStar, as of November 2005 there was approximately 851,000 square feet of industrial space available in the Bronx, of which approximately 331,000 square feet was vacant ground-floor space. Increases or declines in the availability of space are typical with revolving occupancy.

**Table 3-4**  
**Available Ground-Floor Industrial Space**  
**in the Bronx in March 2005**

Property	Floor	Available Space (sf)	Rent/sf
Property A*	1st	6,000	\$12-\$16
Property B*	1st	22,000	\$5-\$8
Property C*	1st	40,000	\$10
Property D*	1st	10,000	Negotiable
Property E*	1st	13,000	Negotiable
Property F	1st	7,100	\$16
Property G <sup>1</sup>	1st	90,000	\$8.50
Property H* <sup>1</sup>	1st	6,000	\$10
Property I*	1st	10,000	Negotiable
Property J	1st	50,000	Negotiable
Property K*	1st	10,000	\$7.20
Property L*	1st	14,500	\$7.50
Property M**	1st	40,000	\$6.75
Property N*	1st	15,000	Negotiable
Property O*	1st	20,000	Negotiable
Property P*	1st	15,000	Negotiable
Property Q*	1st	40,000	Negotiable
Property R**	1st	27,950	\$8.59
Property S**	1st	16,000	\$8.50
Property T	1st	20,000	\$7
<b>TOTAL</b>		<b>472,550 sf</b>	
<b>Notes:</b> * Properties located in or near the Bronx Empowerment Zone and the New York State Economic Development Zone. ** Properties located just in the New York State Economic Development Zone. 1 <u>As of November 2005 Properties G and H are no longer available for lease, according to the New York City Department of City Planning, Bronx Office.</u> <b>Source:</b> CB Richard Ellis, March 2005.			

In addition to the available properties in the Bronx, there is roughly 8.5 million square feet of available industrial space in Brooklyn and Queens combined, and another 4.5 million square feet in Manhattan. With more than ample industrial space (13.5 million square feet) the businesses current located within the Bronx Terminal Market would not have any difficulty in finding alternate industrial space within the Bronx or New York City.

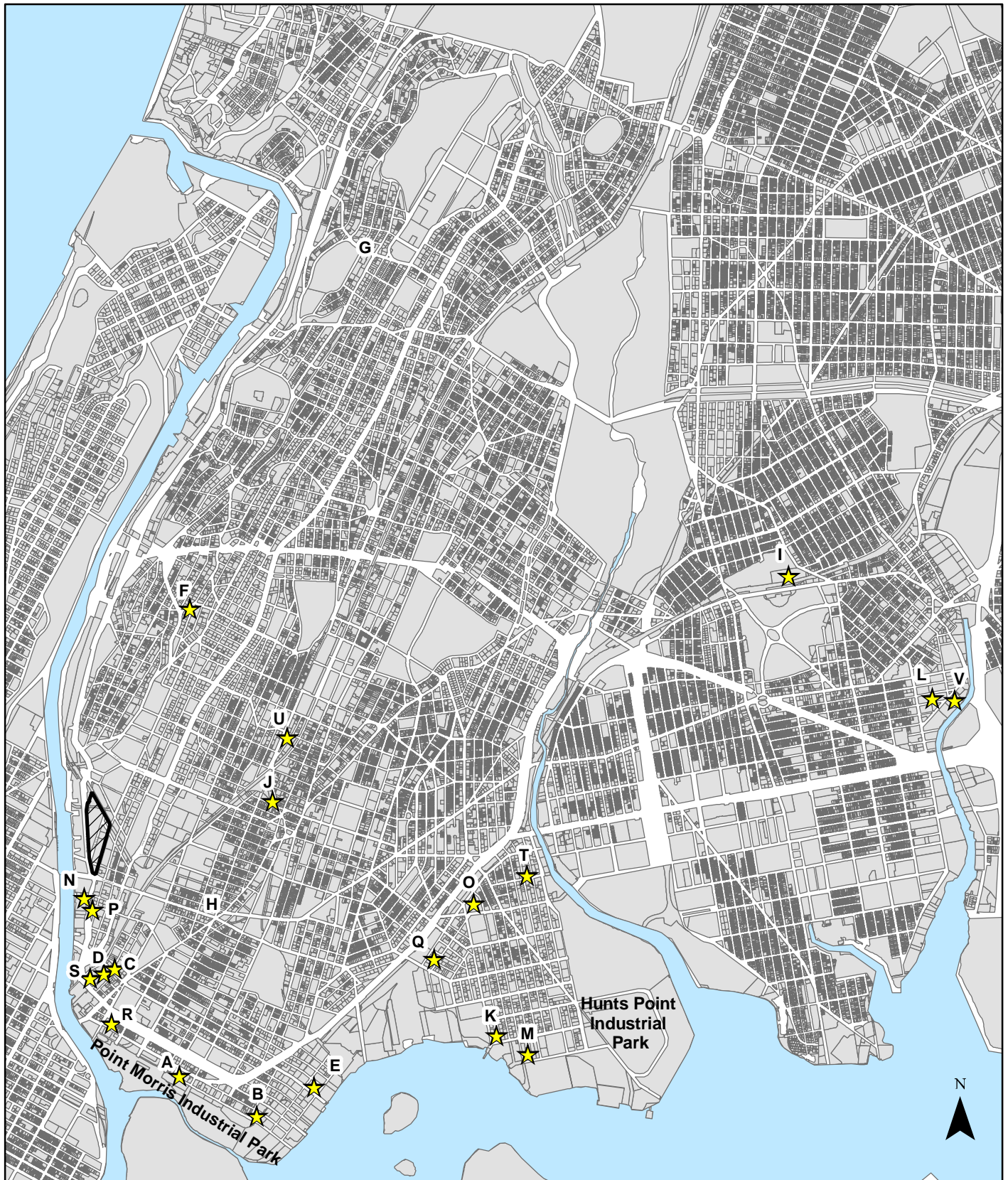
#### *FUTURE WITHOUT THE PROPOSED ACTIONS*

##### *Project Site*

In the future without the proposed actions, it is assumed that in both 2009 and 2014 the Bronx Terminal Market would remain as a wholesale food distribution facility and the existing businesses would remain on the Bronx Terminal Market site.

##### *Trade Area*

There are no major residential or commercial construction projects planned in the study area in the future without the proposed actions by the 2009 Build year. However, 149th Street between Griffin Place and Exterior Street would be reconstructed. Improvements would include better traffic lighting, sidewalks, and curbs, thereby improving both vehicular and pedestrian access to the area. The reconstruction work is expected to be completed prior to 2009.



0 2,500 5,000 Feet

Industrial Properties with Available Ground-Floor Space as of March 2005  
Figure 3-3



Three institutional projects are planned for the study area by 2009: NYCDHS has plans for a new Emergency Assistance Unit at 151st Street and Walton Avenue to replace its existing facility at this location; Hostos Community College has plans to renovate a 125,000 gsf academic building; and the SCA has proposed the construction of an approximately 275,000 gross square foot, 2,300-seat school complex on the northeast corner of Concourse Village West and East 153rd Street. Outside of the study area, Lincoln Hospital is in the process of constructing several new facilities, including a labor and delivery center and an MRI unit. The hospital also has plans for a renovated emergency room, women's option center, and upgrade of an existing parking garage.

One major project proposed within the study area by 2009 is the construction of a new stadium for the New York Yankees on the north side of 161st Street between River Avenue and Jerome Avenue within Macombs Dam Park, directly north of the current Yankee Stadium. The potential socioeconomic impacts of that project are discussed in Chapter 22, "Future Conditions with a Relocated Yankee Stadium."

A widening of the Major Deegan Expressway viaduct is planned for completion by 2011-2012. This reconstruction would improve access to the area, including the project site. In addition, the Metro North Rail Road has been studying the possibility of establishing a station in the study area at least since the mid-1980s. If this station were created, it would improve transit access to the area. An East 153rd Street Bridge over the Metro North Railroad tracks between Grand Concourse and Park Avenue is also planned.

Also by 2014, across the Harlem River in East Harlem, the East River Plaza development is planned on portions of blocks located between East 116th and East 119th Streets. The large scale retail center includes approximately 475,000 gross square feet (gsf) of retail space on four levels as well as a parking facility for 1,248 vehicles.

#### ***PROBABLE IMPACTS OF THE PROPOSED ACTIONS***

One of the key issues for the direct business displacement analysis is to determine if the businesses currently located on the project site are of significant economic value to the City or regional area and whether they can be relocated within the Bronx or New York City without great difficulty. The wholesale food industry businesses to be displaced represent about 4 percent of the wholesale food employment in the Bronx and 1 percent of the wholesale food employment in New York City. In addition, the businesses on the project site employ less than 1 percent of all wholesale employees in the city. Because the businesses currently located within the Bronx Terminal Market represent a relatively small portion of wholesale food employment and all wholesale employment in New York City, these businesses do not have a substantial economic value to the city or regional area.

Although the existing businesses within the Bronx Terminal Market would be directly displaced as a result of the Proposed Project, there is sufficient industrial space located within the Bronx and New York City to accommodate them. As of November 2005, there was approximately 851,416 square feet of available industrial space in the Bronx (of which approximately 331,300 was vacant ground-floor space), and another 13 million square feet of industrial properties in the remaining boroughs. This is more than the approximately 400,000 square feet that is being occupied by the existing Bronx Terminal Market businesses. It is expected that the more established businesses in the Bronx Terminal Market such as Cuba Tropical, Latin 17 Meat and Provisions, and NY Produce—which combined employ about 132 (or 44 percent) of the 297

workers—would not have any difficulty in reestablishing themselves elsewhere within the Bronx. In fact, NY Produce has another location within the Hunts Point Produce Market.

Another issue in assessing the economic value of the Bronx Terminal Market businesses is the potential effects on businesses or consumers of losing the product or service offered by the businesses to be displaced. As already mentioned above, the Bronx Terminal Market businesses sell typical/everyday food items such as fruits and vegetables as well as a variety of meat and fish products that can be found elsewhere within the Bronx. Wholesale merchants at the Hunts Point Produce Market, the Hunts Point Cooperative Market (wholesale meat and meat products), and the recently-opened Hunts Point Fish Market provide almost all of the basic fruits, vegetables, meat and seafood that are currently sold at the Bronx Terminal Market. The Hunts Point Produce Market has over 50 merchants that sell a variety of fruits and vegetables from all over the world. Similarly, the Hunts Point Cooperative Meat Market has about 47 independent wholesale businesses that offer a greater selection of meat and meat products than businesses at Bronx Terminal Market. Meat products that are sold at Bronx Terminal Market and can also be found at the Hunts Point Meat Market include beef, poultry, goat, lamb, pork, and organ meats (liver, heart, and tongue) and specialty cuts. For example, Latin American Distributors is a current tenant in the Hunts Point Meat Market that carries fresh and frozen Latin food products.

In addition to the above-mentioned everyday food items, some of the Bronx Terminal Market merchants also sell fruits and vegetable items that are unique to the cultures of West African, Caribbean, and Hispanic populations. Examples of common West African and Caribbean food products that are found in the Bronx Terminal Market include varieties of breadfruit, okra, yams, cassava, plantains, sweet potatoes, batatas, chayote, green bananas, and callaloo (some of the Caribbean fruits and vegetables are similar to West African fruits and vegetables). These products, as well as other Caribbean fruits and vegetables, can also be found at the Hunts Point Produce Market. For example, businesses such as Mendez International Fruits and Vegetables, Top Banana, C&J Produce, and HP Tropical are a few of the businesses located in the Hunts Point Produce Market that import products from Jamaica, Puerto Rico, Costa Rica, South America, and Central America.

There are some merchants at the Bronx Terminal Market, such as African Market, K&K African Market, and Nasem African Market that sell West African specialty items (in addition to common everyday fruits and vegetables). These specialty items include stockfish, fufu flour, bitterleaves, kola nuts, gari, agbono, and palm oil—food items that are commonly used in many West African traditional dishes. West 116th Street in northern Manhattan is home to many West African restaurants and grocery stores, which cater to the growing population of Harlem residents from Senegal, Mali, Ghana, Ivory Coast, and Nigeria. Given the presence of growing West African population and the existence of West African restaurants and grocery stores on West 116th Street, the issue is whether the displacement of the West African merchants from the Bronx Terminal Market could potentially impact West African businesses and consumers in northern Manhattan.

Face-to-face interviews were conducted by AKRF on May 11, 2005 of 10 West African restaurants and grocery stores along West 116th Street between Frederick Douglas and Malcolm X Boulevards to better understand their supply sources. The survey revealed that only one of the restaurants and grocery stores used the Bronx Terminal Market as their primary supplier. Almost all of the grocery stores surveyed said that they are currently purchasing the majority of their goods directly from West Africa or from two West African wholesale food distributors in New Jersey—Heritage Distributors International, Inc. and Makola African Market Imports, which are

importers, distributors, and wholesalers of African food products located in Newark, New Jersey. Outside of the New York City area, they also distribute their products to New Jersey, Washington DC, Chicago, Houston, Minnesota, as well as California. Some of the West African specialty products typically include grains such as millet and sorghum, vegetables such as cocoyam and garden eggs, seeds and beans such as Egusi and Daddawa, and oils such as red palm oil and shea butter.

Similar to the grocery stores, West African restaurant owners also used the New Jersey wholesalers for some of their products as well as directly importing them from West Africa, and buying from the local West African groceries along West 116th Street. While some restaurants do buy products from the Bronx Terminal Market to stock their inventory, they generally make small purchases while waiting for the larger shipment to arrive from West Africa. Only one restaurant purchased all of its goods from the Bronx Terminal Market. However, that restaurant indicated that they are aware of other suppliers in the area that could be used in the absence of the Bronx Terminal Market. It is very likely that this business model is representative of other African restaurants and grocery stores located on West 125th Street.

Within the Bronx, online research and telephone interviews conducted by ARKF in May 2005 found that there are approximately 16 African grocery stores located throughout the borough that deal in both wholesale and retail of West African specialty food items. Out of 10 respondents, approximately 40 percent used merchants in the Bronx Terminal Market to make their purchases, 30 percent imported directly from West Africa, and another 30 percent did a combination of both. In addition to the above retailers in the Bronx, there were two other wholesaler/retailers in other boroughs that sell African specialty foods: International Exotic Products, Inc. in Jamaica, Queens; and Osa Adolor African Market in Brooklyn.

As described in the preliminary assessment, the wholesale food industry businesses to be displaced represent about 4 percent of the wholesale food employment in the Bronx and 1 percent of the wholesale food employment in New York City. All of the foods sold at the Bronx Terminal Market, including West African specialty items, are available through other wholesale distributors and retailers in New York City, as well as in New Jersey. On a regional level, the Hunts Point Produce Market and Meat Market ship similar products throughout the northeast region. Even the more difficult to find West African specialty items are available regionally through other New York City wholesalers as well as two large wholesale distributors in New Jersey whose products are shipped throughout the country. A telephone conversation with the New Jersey wholesale distributors revealed that all of the Bronx Terminal Market merchants that sell African specialty items make their purchases at one of the two New Jersey importers.

Similar to the regional level, the impact of the displaced businesses on local businesses and consumers is also not expected to be significant. Many of the West African businesses and grocery stores in northern Manhattan and the South Bronx either directly import their goods from West Africa or use wholesale distributors in New Jersey to stock their inventories. In addition, online research and telephone interviews confirmed that there are at least 16 African grocery stores located in the Bronx that deal in both wholesale and retail of West African specialty food items, as well as the two wholesale/retail purveyors of African foods and specialty products in Brooklyn and Queens. Although there are some restaurants and retailers of African foods who use the Bronx Terminal Market, it was not their only supply source. Thus, the direct displacement of African food merchants in the Bronx Terminal Market will not completely eliminate sources of African food products in the Bronx and other parts of New York City. All of the above factors combined with the availability of industrial space within the Bronx and New



York City as a whole show that the Bronx Terminal Market businesses do not have a substantial economic value to the city or regional area and can be relocated without any great difficulty. Therefore, the direct displacement of the existing businesses on the project site would not result in significant adverse impacts, and no further analysis of direct business displacement is necessary.

The New York City Economic Development Corporation (NYCEDC) has hired a relocation consultant to provide assistance to the current market tenants of the project site. This is being done independently of the Proposed Project and is not subject to any discretionary approvals. NYCEDC, Bronx Empowerment Zone, and the project sponsor will provide various benefits to assist tenants in their relocation efforts. The relocation package includes the following benefits:

- NYCEDC will provide Bronx Terminal Market tenants relocating in New York City payments of \$10 per square foot toward any relocation expense;
- Tenants who relocate to a building within or near the Bronx Empowerment Zone will be eligible to borrow up to \$500,000, at 0 percent interest rate for a maximum of 10 years, for the purchase of fixtures, equipment, building improvements, or for working capital;
- The project sponsor will provide incentive payments equal to half of the net rental payments paid by each tenant and received by the project sponsor from the date the tenant accepts the relocation offer to the date the tenant vacates;
- NYCEDC's relocation consultant (Cornerstone Group) will provide relocation services—including identifying new spaces, accompanying tenants on tours of new spaces, and negotiation of terms—at no cost to Bronx Terminal Market tenants; and

In addition, tenants were provided with a manual of other government assistance programs that they could potentially qualify for, including:

- Commercial Expansion Program;
- Industrial and Commercial Incentive Program;
- Industrial Development Agency Small Industry Incentive Program (for companies that might acquire buildings);
- Energy Cost Savings Program;
- Energy Business Incentive Rate; and
- Empire Zone benefits, including wage tax credit.

As of November 2005, 6 of the 23 tenants, representing approximately 65,000 square feet of space in the Bronx Terminal Market, have accepted the relocation package and signed stipulations to vacate the Bronx Terminal Market by March 2006. These include: La Ruche Imports, Inc.; Latin 17 Meat & Provisions Corp.; Latin Tropicales, Inc.; Trombetta & Sons, Inc.; K&K African Market; and African Market.

### **INDIRECT BUSINESS AND INSTITUTIONAL DISPLACEMENT: PROPERTY VALUES AND RENT [1/4-MILE STUDY AREA]**

As noted in the preliminary analysis, indirect business and institutional displacement is the involuntary displacement of businesses or institutions that results from a change in socioeconomic conditions created by a proposed action. Similar to indirect residential displacement, the issue for indirect business and institutional displacement is that an action

would lead to increased property values and rents in the study area, making it difficult for some categories of business or institutions to remain at their current locations. Indirect business and institutional displacement can result from a number of factors and conditions, but in this case the potential for change in economic activity would come from the concentration of a new large retail development and its potential to alter local and regional shopping patterns. This section considers whether the Proposed Project introduces enough of a new economic activity to alter existing economic patterns within the ¼-mile study area. While the Proposed Project would attract customers from a broad region that would primarily include the borough of the Bronx and northern Manhattan, it is the businesses in close proximity to the Proposed Project—in this case within the ¼-mile study area—that could be subject to indirect displacement pressures due to increased rents (as a result of new economic activities). The issue of competition as it relates to businesses within the ¼-mile study area (and the broader Primary Trade Area) is addressed in the competition analysis section of the detailed analysis.

### EXISTING CONDITIONS

#### Economic Profile

As shown in Table 3-5, manufacturing employment in New York City has declined by approximately 29 percent since 1990. Data provided by the New York State Department of Labor (NYSDOL) indicates that the manufacturing sector lost almost 96,000 jobs in the City. During this same 10-year period, total private sector employment remained relatively stable, with a total of approximately 3 million private sector employees in the five boroughs in 1990 and again in 2000 (See Table 3-5). Wholesale trade lost approximately 27,000 employees (13 percent decrease) between 1990 and 2000 while Transportation, Communications, and Public Utilities (TCPU) and the FIRE sectors lost 14,000 (6.3 percent decrease) and 28,000 (5.5 percent decrease) employees each. The service sector was the only industry that experienced a significant increase in total employment, with a gain of almost 24 percent between 1990 and 2000.

**Table 3-5**  
**Private Sector Employment: 1990-2000**

	¼-Mile Study Area			Bronx			New York City		
	Employment		Percent Change	Employment		Percent Change	Employment		Percent Change
	1990	2000	1990-2000	1990	2000	1990-2000	1990	2000	1990-2000
Manufacturing	2,088	1,569	-24.9	18,000	10,900	-39.4	335,200	239,400	-28.6
Construction	1,193	414	-65.3	12,400	10,800	-12.9	109,000	117,000	6.9
TCPU	203	477	135.0	8,800	9,400	6.8	219,900	206,100	-6.3
Wholesale Trade	35	643	1737.1	12,000	12,000	0.0	208,300	181,300	-13.0
Retail Trade	1,989	1,206	-39.4	30,000	30,800	2.7	382,200	424,600	11.1
FIRE	1,689	569	-66.3	11,400	12,500	9.6	512,000	483,900	-5.5
Services	3,000	5,056	68.5	84,200	101,600	20.7	1,124,000	1,388,600	23.5
All Other	0	26	N/A	700	900	28.6	11,900	18,500	55.5
Total Industry	10,197	9,960	-2.3	177,500	188,900	6.4	2,902,900	3,059,400	5.4
<b>Note:</b> Employment numbers for some categories may be low due to suppression of data.									
<b>Source:</b> New York State Department of Labor.									

In 2000, private sector employment in the Bronx was about 181,000—increasing by just over 6 percent from 1990 (see Table 3-5). Similar to New York City, employment categories in the Bronx with the highest number of employees in 2000 were services (101,600 employees), retail

trade (30,800 employees) and FIRE (12,500 employees). Between 1990 and 2000, the greatest increase in total employment came from all other (29 percent) services (21 percent), and FIRE (10 percent). In contrast, the greatest decrease in total employment was experienced by the manufacturing industry (39 percent) followed by the construction sector (less than 13 percent).

Within the ¼-mile study area, total private sector employment in 2000 was just under 10,000 workers, compared to 10,200 in 1990. In 2000, the top three leading employers within the ¼-mile study area were services (5,056 workers), manufacturing (1,569 workers), and retail trade (1,206 workers). The 2.3 percent decrease in total employment in the ¼-mile study area is in contrast with the 6 and 5 percent increase in total employment in the Bronx and New York City as a whole. Similar to the Bronx, the manufacturing and construction sectors experienced a decline in total employment between 1990 and 2000. Although the decrease in manufacturing employment was greater in the Bronx (39 percent), employment in the construction sector decreased significantly more in the ¼-mile study area (65 percent) compared to the Bronx. In addition, retail trade and the FIRE industries also decreased in the ¼-mile study area by 39 and 66 percent, respectively. In contrast, the same industries increased their employment in the Bronx by almost 3 and 10 percent, whereas New York City experienced an increase of 11 percent in retail trade and a decrease of less than 6 percent in the FIRE category.

Categories that showed gains in employment within the ¼-mile study area include wholesale trade (1737 percent), TCPU (135 percent) and services (69 percent). The wholesale trade sector increased total employment from 35 workers in 1990 to approximately 643 workers in 2000. However, since 2000, total employment in wholesale trade decreased from 643 workers in 2000 to 258 by the 3Q of 2003—a decrease of almost 60 percent. Unlike the ¼-mile study area, wholesale trade in the Bronx remained unchanged while TCPU and services only increased by less than 7 and 21 percent, respectively. In contrast to the ¼-mile study area, TCPU and retail trade decreased by roughly 6 and 13 percent, respectively, while the service sector increased by approximately 24 percent.

### *Presence of categories of vulnerable businesses/institutions or employment*

Businesses most vulnerable to indirect displacement due to increased rent are typically those businesses whose uses are less compatible with the economic trend which is creating upward rent pressures in the study area; i.e., those businesses that tend not to directly benefit (in terms of increased business activity) from the market forces generating the increases in rent. For example, if a neighborhood is becoming a more desirable place to live, uses that are less compatible with residential conditions (such as manufacturing) would be less able to afford increases in rent due to increases in property values compared to a neighborhood service use, such as a bank, which could see increased business activity from the increased residential presence.

Despite the decline in manufacturing employment between 1990 and 2000, the real estate market for industrial properties within the study area, and the Bronx as a whole, has been performing well. According to the real estate firm CB Richard Ellis, prices for industrial properties over the past few years have been increasing, with the vacancy rate currently at approximately 8 percent. Given the low vacancy rate in the face of increasing rents, the industrial businesses in the study area are not vulnerable to indirect displacement due to increased rents.

### *FUTURE WITHOUT THE PROPOSED ACTIONS*

Conditions on the project site and within the study area in the future without the proposed actions would be as discussed above under “Direct Business Displacement.”

***PROBABLE IMPACTS OF THE PROPOSED ACTIONS***

As previously discussed, the issue for indirect business displacement is that an action would increase property values and thus rents in the study area, making it difficult for some categories of business (i.e., industrial) to remain at their current locations. However, the overall trend is that manufacturing and wholesale employment has been decreasing and the industries as a whole represent a small percentage of total employment both in the Bronx and New York City. As shown in Table 3-5, manufacturing has decreased by almost 40 and 29 percents in the Bronx and New York City between 1990 and 2000, while wholesale employment was unchanged in the Bronx, but decreased by 13 percent in the city as a whole, respectively.

Despite the decline in manufacturing employment between 1990 and 2000, the real estate market for industrial properties within the Bronx has been performing well. According to the real estate firm CB Richard Ellis, prices for industrial properties over the past few years have been increasing, with the vacancy rate currently at approximately 8 percent. Current industrial rents in the study area are about \$8 to \$10 per square foot, which is comparable to other industrial areas in the Bronx. The low vacancy rate combined with high industrial rents makes it unlikely that the Proposed Project would create indirect displacement of industrial properties within the ¼-mile study area.

In addition to a strong industrial market, most of the industrial properties in the ¼-mile study area are currently within an M1-2 and M2-1 zoning districts. The uses permitted as-of-right within M1 zoning districts fall within Use Groups 4-14, 16, and 17. Of the use groups permitted, only Use Groups 6 and 12 include retail or service establishments such as book stores, music stores, toy stores, record stores, and stationery stores that could potentially locate in the ¼-mile study area. However, many retail uses, including furniture stores, department stores, appliance stores, and food stores, are limited in their size to no more than 10,000 square feet of floor area. Most Use Group 10 uses, including carpet, rug, linoleum or other floor covering stores, department stores, furniture stores, clothing or clothing accessory stores, television, radio or household appliance stores, and variety stores, all with no limitation on floor area, are permitted in M1 districts only by special permit of the City Planning Commission. All retail uses are limited by the Floor Area Ratio (FAR) requirement for the M1-2 zoning district, which limits building size to 2.0 FAR.

The retail uses in M2 zoning districts are generally limited to those included in Use Groups 6 and 12, including convenience retail or service establishments such as bakeries, barber shops, drug stores, grocery stores and supermarkets under 10,000 square feet, hardware stores, and liquor stores, among others (Use Group 6), and antique stores, music stores, book stores, and paint stores, among others (Use Group 12). Within M2 zoning districts, retail uses in Use Group 6C are limited to specific types of stores such as antique stores, art galleries, artist supply stores and picture framing stores, among others. Toy stores, furniture stores, and most apparel stores are not permitted in this zoning district.

In conclusion, the ¼-mile study area is not likely to experience indirect business displacement as a result of increased property values and rents. Current rents for industrial properties in the study area are comparable to other industrial areas in the Bronx such as the Hunts Point and Port Morris IPIPs. In addition, the potential for development of additional retail uses similar or complementary to the Proposed Project is severely limited by the presence of institutional uses east of the project site, Yankee Stadium to the north, the Harlem River to the west, the development constraints imposed by highway ramps, as well as the existing zoning in the study

area which would limit any potential impacts by the need for a discretionary action by the City Planning Commission.

### **INDIRECT BUSINESS DISPLACEMENT: COMPETITION**

According to the Section 322.2 of the *CEQR Technical Manual*, development activity such as shopping facilities may attract sales from existing stores, and while these competitive socioeconomic impacts do not necessarily generate environmental concerns, they can become an environmental concern if they have the potential to affect neighborhood character by affecting the viability of neighborhood shopping areas. The amount and type of retail that would be introduced by the proposed actions—approximately 957,700 gross square feet of retail—could potentially result in indirect displacement due to competition. Therefore, the section below presents an evaluation of whether potential indirect displacement from competition could result in significant adverse impacts.

#### ***DELINEATION OF THE TRADE AREA***

As described in the *CEQR Technical Manual*, an analysis of the potential effects of competition should encompass a primary trade area from which the bulk of the new stores' sales are likely to be derived. As defined by the *Shopping Center Development Handbook*, published by the Urban Land Institute, trade areas for shopping centers similar in size to the Proposed Project generally extend 12 miles from the project site, and typically can be reached within a 30 minute drive. Shopping centers expect to draw 70 to 80 percent of their regular customers from this trade area.

Trade areas for major retail projects in New York City are typically smaller than the national standards cited in the *Shopping Center Development Handbook*, due primarily to the density of development in the New York Metropolitan region. A 12-mile radius from the project site in the South Bronx extends throughout the Bronx and into portions of every other New York City borough except Staten Island, as well as Westchester, Nassau, Bergen, and Hudson Counties. This would not be an appropriate trade area for the Proposed Project, because many of those traveling from the more distant reaches of a 12-mile trade area would be traveling past destination retail concentrations of equal or greater size to reach the project site. For example, residents of Nassau County are more likely to regularly visit closer retail destinations such as Roosevelt Field Mall in Garden City. In addition, for Queens and the New Jersey counties, the bridge and tunnel tolls would discourage regular shopping trips to the Bronx.

Thus, for purposes of analysis the "Primary Trade Area" for the Proposed Project is defined as the borough of the Bronx as well as Manhattan north of 110th Street, based on the regional attraction that would be created by 957,700 square feet of retail (see Figure 3-1). The Proposed Project would likely draw a substantial number of customers from nearly every part of the Bronx because of its proximity to major roadways, its merchandise mix, and the regional attraction created by the development of nearly 1 million square feet of retail space. It is expected that 70 to 80 percent of the Proposed Project's customer base would be drawn from the Primary Trade Area.

There is an expectation that within the Primary Trade Area, the Proposed Project would draw a large portion of its repeat business from residents that live closest to the project site, as a result of more convenient access, shorter travel time and distance, and propensity to take advantage of a major shopping resource close to home. Those living farther from the Proposed Project would likely have a greater selection of large shopping resources in closer proximity to their homes. For this reason, the competition analysis focuses on both the Primary Trade Area and a smaller

3-mile area surrounding the project site, referred to as the “3-Mile Trade Area.” The 3-Mile Trade Area includes the portion of Manhattan north of 110th Street and the portion of Bronx County roughly bounded by East Fordham Road and Kingsbridge Road to the north, the Harlem River to the west, the East River to the south, and the Bronx River to the east (see Figure 3-2). The 3-Mile Trade Area spans several neighborhoods in Manhattan (Central Harlem, South Harlem, East Harlem, Washington Heights, and Inwood) and the Bronx (South Bronx and Central Bronx). The South Bronx includes neighborhoods south of the Cross Bronx Expressway, including Highbridge, Mount Eden, Concourse Village, Crotona Park East, Claremont, Morrisania, Bathgate, Longwood, Melrose, Mott Haven, Port Morris, and Hunts Point. Central Bronx covers the area north of the Cross Bronx Expressway and south of Gun Hill Road and includes Mount Hope, East Tremont, Bronx Park South, Tremont, Belmont, University Heights, Fordham, Bedford Park, Kingsbridge Heights, Norwood, and Van Cortlandt Village. The 3-Mile Trade Area includes all or portions of Manhattan Community Districts 9 through 12 and Bronx Community Districts 1 through 7.

### EXISTING CONDITIONS

The following sections present demographic conditions in the Primary Trade Area and 3-Mile Trade Area, develop a profile of the retail sector, and provide data on overall employment, retail sales, and number of retail business establishments within the Primary Trade Area and 3-Mile Trade Area.

#### Demographic Profile

Demographic factors can affect retail market potential. Changes in the number of people living in a trade area can alter the characteristics of the potential customer pool, particularly in terms of household income that can affect how much households spend on retail purchases, as well as auto ownership which can affect where people shop. These demographic and household characteristics are discussed below for both the Primary Trade Area (Bronx County and the area north of 110th Street in northern Manhattan) and the 3-Mile Trade Area (see Figure 3-2), and are used to inform the discussion on potential impacts of the proposed Gateway Center at Bronx Terminal Market development.

#### Primary Trade Area

**Population and Households.** As of 2000, there were approximately 1.8 million people living in the Primary Trade Area, representing approximately 23 percent of the total population of New York City. Residents in the Primary Trade Area lived in 642,695 households, representing 21 percent of all households in the city (see Table 3-6). Total populations in the Bronx and Manhattan were approximately 1.3 and 1.5 million, respectively, in 2000.

**Table 3-6**  
**Population and Households, Primary Trade Area and New York City, 1990 and 2000**

Area	1990		2000		Growth 1990-2000			
	Population	Households	Population	Households	Population	Households	% Growth in Population	% Growth in Households
<b>Primary Trade Area</b>	<b>1,635,740</b>	<b>590,752</b>	<b>1,811,529</b>	<b>642,695</b>	<b>175,789</b>	<b>51,943</b>	<b>10.7%</b>	<b>8.8%</b>
Bronx	1,203,789	424,112	1,332,650	463,212	128,861	39,100	10.7%	9.2%
Manhattan	1,487,536	716,422	1,537,195	738,644	49,659	22,222	3.3%	3.1%
Total New York City	7,322,564	2,819,401	8,008,278	3,021,588	685,714	202,187	9.4%	7.2%

**Sources:** U.S. Census Bureau, 1990 and 2000 Census, Summary File 1.

The population in the Primary Trade Area has grown substantially in recent years. Between 1990 and 2000, the Primary Trade Area gained 175,789 people and 51,943 households. The rate of population growth in the Primary Trade Area (10.7 percent between 1990 and 2000) was similar to the Bronx, but outpaced the rate of growth in Manhattan and New York City overall. In contrast, the 8.8 percent rate of growth of households in the Primary Trade Area was slightly less than the Bronx (9.2 percent), but still higher than Manhattan (3.1 percent) and New York City (7.2 percent).

***Household Income.*** In 1999, median household income for the Primary Trade Area, expressed in 2005 constant dollars (i.e., adjusted to account for inflation) was \$33,773—approximately \$11,046 lower than the citywide median of \$44,819 (see Table 3-7). The median household income in the Primary Trade Area decreased by 7.4 percent or \$2,706 between 1989 and 1999 (in constant dollars). This decrease in median household income was higher than the 5.3 percent decrease in New York City overall but similar to the Bronx where median household income decreased by 7.2 percent. In contrast, median household income in Manhattan increased from \$51,176 per year in 1989 to approximately \$55,045 per year in 1999—an increase of 7.6 percent or \$3,869 per year.

**Table 3-7**

**Median Household Income, Primary Trade Area and New York City,  
1989 and 1999**

Area	1989	1999	Absolute Change 1989- 1999	Percent Change 1989-1999
<b>Primary Trade Area</b>	<b>\$36,479</b>	<b>\$33,773</b>	<b>\$(2,706)</b>	<b>-7.4%</b>
Bronx	\$ 34,809	\$ 32,317	\$ (2,492)	-7.2%
Manhattan	\$ 51,176	\$ 55,045	\$ 3,869	7.6%
Total New York City	\$ 47,307	\$ 44,819	\$ (2,488)	-5.3%
<b>Note:</b> All values are expressed in 2005 constant dollars.				
<b>Sources:</b> U.S. Census Bureau, 1990 and 2000 Census, Summary File 3				

***Vehicle Availability.*** Vehicle availability can affect shopping habits. Households with access to at least one vehicle are generally more likely to travel farther distances to comparison shop and make certain household purchases than households without access to a car. While this pattern is more typically observed for shopping goods or department store type merchandise, it is also applicable to food shopping or supermarket purchases. For example, a household with access to a car may drive to a wholesale club or major supermarket several miles from home to stock-up on food products or household supplies to serve their needs for a week or more. Households without access to a car are more likely to shop at the grocery store closest to their homes, and may be more likely to make more frequent trips, buying smaller quantities of food per trip than driving households.

According to the 2000 Census, nearly two-thirds of the households in the Primary Trade Area (64.5 percent) did not have access to a car (see Table 3-8), significantly higher than the citywide average where about 56 percent of the households do not have access to a car. Only about one-quarter of the households in the Primary Trade Area had access to at least one car, which is lower than the citywide average of about 32 percent of the households with access to one car. In general households in the Primary Trade Area have less access to cars than households in the

**Table 3-8**

**Vehicles Available for Use by Household Members, Primary Trade Area and New York City, 2000**

Area	No Car		One Car		Two Cars		Three or More Cars	
	HH	% of HH	HH	% of HH	HH	% of HH	HH	% of HH
<b>Primary Trade Area</b>	<b>414,773</b>	<b>64.5%</b>	<b>159,624</b>	<b>24.8%</b>	<b>38,530</b>	<b>6.0%</b>	<b>9,530</b>	<b>1.5%</b>
Bronx	285,309	61.6%	133,331	28.8%	35,841	7.7%	8,731	1.9%
Manhattan	572,094	77.5%	149,476	20.2%	13,172	1.8%	3,902	0.5%
Total New York City	1,682,946	55.7%	955,165	31.6%	305,267	10.1%	78,210	2.6%
<b>Sources:</b> U.S. Census Bureau, Census 2000, Summary File 3								

city as a whole and in the Bronx. Households in Manhattan tend to have even less access to a car, principally due to the expense of garaging a car or the inconvenience of parking a car on the street.

### 3-Mile Trade Area

*Population and Households.* As of 2000, there were approximately 1 million people living in 357,481 households within the 3-Mile Trade Area, comprising approximately 13 percent and 12 percent of all New York City residents and households, respectively. As shown in Table 3-9, total population and total households in the 3-Mile Trade Area increased by 10 and 8.9 percent respectively between 1990 and 2000—an increase of 94,659 residents and 29,128 households.

**Table 3-9**

**Population and Households, 3-Mile Trade Area and New York City, 1990 and 2000**

Area	1990		2000		Growth 1990-2000			
	Population	Households	Population	Households	Population	Households	% Growth in Population	% Growth in Households
<b>3-Mile Trade Area</b>	<b>947,172</b>	<b>328,353</b>	<b>1,041,831</b>	<b>357,481</b>	<b>94,659</b>	<b>29,128</b>	<b>10.0%</b>	<b>8.9%</b>
Bronx	1,203,789	424,112	1,332,650	463,212	128,861	39,100	10.7%	9.2%
Manhattan	1,487,536	716,422	1,537,195	738,644	49,659	22,222	3.3%	3.1%
Total New York City	7,322,564	2,819,401	8,008,278	3,021,588	685,714	202,187	9.4%	7.2%
<b>Sources:</b> U.S. Census Bureau, 1990 and 2000 Census, Summary File 1.								

Similar to the Primary Trade Area, the increase in residents and households in the 3-Mile Trade Area was higher than New York City overall. The Bronx as a whole showed the highest increase in total population (10.7 percent) and households (9.2 percent); Manhattan as a whole had the lowest rate of increase in both population and households.

*Household Income.* In 1999, median household income for the 3-Mile Trade Area, expressed in 2005 constant dollars (i.e., adjusted to account for inflation) was \$26,468—significantly lower than the citywide median of \$44,819 (see Table 3-10). However, between 1989 and 1999, the median household income the 3-Mile Trade Area increased by 2.4 percent, a better condition than the decline in household income experienced by households in the Bronx as a whole and throughout New York City in general.



**Table 3-10**

**Median Household Income, 3-Mile Trade Area and New York City,  
1989 and 1999**

Area	1989	1999	Absolute Change 1989- 1999	Percent Change 1989-1999
<b>3-Mile Trade Area</b>	<b>\$25,855</b>	<b>\$26,468</b>	<b>\$613</b>	<b>2.4%</b>
Bronx	\$ 34,809	\$ 32,317	\$ (2,492)	-7.2%
Manhattan	\$ 51,176	\$ 55,045	\$ 3,869	7.6%
Total New York City	\$ 47,307	\$ 44,819	\$ (2,488)	-5.3%
<b>Note:</b> All values are expressed in 2005 constant dollars.				
<b>Sources:</b> U.S. Census Bureau, 1990 and 2000 Census, Summary File 3				

*Vehicle Availability.* According to the 2000 Census, approximately 3 out of 4 households in the 3-Mile Trade Area did not have access to a car (see Table 3-11). There were more residents without a car in the 3-Mile Trade Area compared to the Primary Trade Area, where 64.5 percent of the households were without access to a car. Similarly, there were proportionally more households without access to a car in the 3-Mile Trade Area than in the Bronx as a whole, and only slightly less than in Manhattan, where access to a car is traditionally low. Vehicle availability is significantly lower than in the city overall.

**Table 3-11**

**Vehicles Available for Use by Household Members, 3-Mile Trade Area  
and New York City, 2000**

Area	No Car		One Car		Two Cars		Three or More Cars	
	HH	% of HH	HH	% of HH	HH	% of HH	HH	% of HH
<b>3-Mile Trade Area</b>	<b>271,346</b>	<b>75.9%</b>	<b>61,820</b>	<b>17.3%</b>	<b>7,617</b>	<b>2.1%</b>	<b>2,388</b>	<b>0.7%</b>
Bronx	285,309	61.6%	133,331	28.8%	35,841	7.7%	8,731	1.9%
Manhattan	572,094	77.5%	149,476	20.2%	13,172	1.8%	3,902	0.5%
Total New York City	1,682,946	55.7%	955,165	31.6%	305,267	10.1%	78,210	2.6%
<b>Sources:</b> U.S. Census Bureau, Census 2000, Summary File 3								

### *Employment Profile*

#### Primary Trade Area

Within the Primary Trade Area, employment trends were collected for the fourth quarters of 2000 and 2003. Table 3-12 below shows that total employment in the Primary Trade Area increased by approximately 0.7 percent during the period, from about 217,000 in 2000 to almost 218,500 in 2003. The employment increase in the Primary Trade Area was due to the 1.9 percent employment growth in Bronx County—employment in the Manhattan portion of the Primary Trade Area declined slightly over the three-year period. Employment for all of Manhattan and New York City decreased by 7.5 percent and 4.7 percent, respectively.

**Table 3-12**

**Private Sector Employment Trends Within Primary Trade Area**

<b>Employment Category</b>	<b>4Q 2000</b>	<b>4Q 2003</b>	<b>2000–2003 Percent Change</b>
Construction	11,448	10,127	-11.5
Manufacturing	10,969	9,020	-17.8
Transportation & Warehousing	4,544	4,564	0.4
Wholesale Trade	10,412	9,851	-5.4
Retail Trade	27,144	27,254	0.4
Information	4,927	4,271	-13.3
Finance & Insurance	3,184	3,736	17.3
Real Estate & Rental Listings	13,155	12,490	-5.1
Professional, Scientific & Technical Services	4,805	4,913	2.2
Management of Companies & Enterprises	1,260	1,067	-15.3
Admin & Support & Waste Mgmt. & Remediation Services	7,414	8,766	18.2
Educational Services	16,211	16,029	-1.1
Health Care & Social Services	75,672	76,732	1.4
Arts, Entertainment & Recreation	3,127	2,928	-6.4
Accommodation & Food Services	11,653	12,811	9.9
Other Services	10,319	12,024	16.5
Unclassified	701	1,839	162.3
<b>Primary Trade Area Total Employment</b>	<b>216,945</b>	<b>218,422</b>	<b>0.7</b>
<b>Bronx County</b>	<b>188,900</b>	<b>192,400</b>	<b>1.9</b>
<b>Manhattan</b>	<b>1,931,400</b>	<b>1,786,900</b>	<b>-7.5</b>
<b>NYC</b>	<b>3,059,400</b>	<b>2,914,300</b>	<b>-4.7</b>
<b>Note:</b> Employment data for the Primary Trade Area includes private sector employment for Manhattan zip codes 10027, 10030, 10031, 10032, 10033, 10035, 10037, 10039 and all of Bronx County. <b>Source:</b> 4thQ 2000 & 2003 New York State Department of Labor.			

Health care and social services was the top employer in the Primary Trade Area, with almost 77,000 employees in 2003, or 35 percent of total employment, followed by retail trade (over 27,000 employees, 12.5 percent of total employment) and other services (over 12,000 employees). Employment in retail trade remained relatively constant over the three-year period, while the construction, manufacturing, and information sectors experienced significant decreases in employment. Notable employment increases were in the finance and insurance, administration and support/waste management/remediation services, and accommodation and food services sectors.

### 3-Mile Trade Area

Similar to the Primary Trade Area, employment trends for the 3-Mile Trade Area were collected for the fourth quarters of 2000 and 2003. Table 3-13 below shows that total employment in the 3-Mile Trade Area increased by approximately 2.2 percent during the period, from about 75,800 in 2000 to almost 77,500 in 2003. Bronx County also experienced a slight increase of 1.9 percent, from 189,000 employees in 2000 to 192,000 employees in 2003.

Health care and social services was the top employer in the 3-Mile Trade Area, with almost 22,000 employees in 2003, followed by retail trade (14,000 employees) and other services (7,000 employees). Retail employment was a larger percentage of the total employment in the 3-Mile Trade Area (17.9 percent) compared to the Primary Trade Area (12.5 percent).

**Table 3-13**

**Private Sector Employment Trends Within 3-Mile Trade Area**

Employment Category	4Q 2000	4Q 2003	2000–2003 Percent Change
Construction	3,132	3,826	22.2
Manufacturing	2,770	1,025	-63.0
Transportation & Warehousing	679	654	-3.7
Wholesale Trade	1,857	1,694	-8.8
Retail Trade	14,062	13,901	-1.1
Information	722	309	-57.2
Finance & Insurance	931	1,580	69.7
Real Estate & Rental Listings	6,542	6,422	-1.8
Professional, Scientific & Technical Services	2,703	2,572	-4.8
Management of Companies & Enterprises	88	205	133.3
Admin & Support & Waste Mgmt. & Remediation Services	3,269	4,950	51.4
Educational Services	5,250	4,382	-16.5
Health Care & Social Services	22,873	21,761	-4.9
Arts, Entertainment & Recreation	542	146	-73.1
Accommodation & Food Services	5,136	5,848	13.9
Other Services	4,661	7,143	53.3
Unclassified	589	1,076	82.7
<b>3-Mile Trade Area Total Employment</b>	<b>75,806</b>	<b>77,494</b>	<b>2.2</b>
<b>Bronx County</b>	<b>188,900</b>	<b>192,400</b>	<b>1.9</b>
<b>Manhattan</b>	<b>1,931,400</b>	<b>1,786,900</b>	<b>-7.5</b>
<b>NYC</b>	<b>3,059,400</b>	<b>2,914,300</b>	<b>-4.7</b>
<b>Note:</b> Employment data for the 3-Mile Trade Area includes private sector employment for Manhattan zip codes 10027, 10030, 10031, 10032, 10033, 10035, 10037, 10039 and Bronx zip codes 10451, 10452, 10453, 10454, 10455, 10456, 10457, 10458, 10459, 10460, and 10468.			
<b>Source:</b> 4thQ 2000 & 2003 New York State Department of Labor.			

However, five employment categories experienced substantial increases in job creation between 2000 and 2003—management of companies and enterprises (133 percent), unclassified (83 percent), finance and insurance (70 percent), other services (53 percent), and administration and support and waste management and remediation services (51 percent). The three employment categories within the 3-Mile Trade Area that showed a significant decrease in total employment were arts, entertainment, and recreation (-73.1 percent), manufacturing (-63.0 percent), and information (-57.2 percent).

#### *Retail Profile*

The retail sector data is divided into four major categories that define the types of goods found within the areas. The four major categories include shopping goods, convenience goods, eating and drinking, and building materials. The shopping goods category includes merchandise that is typically sold in department stores, both full-line and discount department stores. The convenience goods category contains food and housekeeping products that are typically sold in supermarkets and wholesale clubs. The proposed Gateway Center at Bronx Terminal Market would most likely include a mix of shopping goods stores and convenience goods stores. The Proposed Project is expected to consist of approximately 4 large-scale retail stores totaling ±576,137 gsf; approximately 5 medium-scale retail stores totaling ±324,717 gsf; and miscellaneous small-scale retail stores/restaurants totaling ±56,857 gsf.

### Shopping Goods

As shown in Table 3-14, there were 1,640 shopping goods stores located in the Primary Trade Area in 2002. The largest proportion (49 percent) was clothing and accessory stores. Another 200 stores (12 percent) sold furniture and home furnishings, and another 200 (12 percent) were general merchandise stores.

**Table 3-14**

**Estimated Shopping Goods Sales and Number of Establishments: Bronx  
Terminal Market 3-Mile Trade Area and Primary Trade Area, 2002**

NAICS	Business Description	3-Mile Trade Area		Primary Trade Area	
		No. of Establishments	Sales (Millions)	No. of Establishments	Sales (Millions)
	<b>Total Retail</b>	<b>3,936</b>	<b>\$ 4,748.3</b>	<b>6,253</b>	<b>\$ 7,651.6</b>
<b>452</b>	<b>General Merchandise Stores</b>	<b>139</b>	<b>\$ 365.7</b>	<b>200</b>	<b>\$ 543.0</b>
4521	Department Stores	6	\$ 264.1	8	\$ 384.7
<b>448</b>	<b>Clothing &amp; Accessory Stores</b>	<b>572</b>	<b>\$ 710.7</b>	<b>806</b>	<b>\$ 928.8</b>
<b>442</b>	<b>Furniture &amp; Home Furnishings Stores</b>	<b>132</b>	<b>\$ 170.6</b>	<b>200</b>	<b>\$ 237.3</b>
<b>443</b>	<b>Electronics &amp; Appliance Stores</b>	<b>91</b>	<b>\$ 74.6</b>	<b>157</b>	<b>\$ 180.0</b>
<b>453</b>	<b>Miscellaneous Shopping Goods</b>	<b>184</b>	<b>\$ 151.2</b>	<b>277</b>	<b>\$ 214.9</b>
	<b>TOTAL SHOPPING GOODS</b>	<b>1,119</b>	<b>\$1,472.8</b>	<b>1,640</b>	<b>\$ 2,104.0</b>
<b>Notes:</b> All dollar values are presented in 2005 dollars.					
<b>Sources:</b> 2002 Census of Retail Trade and Claritas, Inc. 2004 Retail SIC Summary data.					

Sales at shopping goods stores in the Primary Trade Area totaled approximately \$2.1 billion (in 2005 dollars) in 2002, representing approximately 27 percent of the total retail sales in the trade area. The majority of shopping goods sales came from the clothing and accessory stores (\$928.8 million) and general merchandise stores (\$543.0 million). Another \$237.3 million in sales was generated by furniture and home furnishing stores. Although department stores accounted for only 4 percent of all general merchandise establishments, they generated approximately 71 percent of all general merchandise sales.

Within the 3-Mile Trade Area, shopping goods sales totaled approximately \$1.5 billion, representing approximately 31 percent of the total retail sales in the area. A majority of shopping goods sales came from clothing and accessory stores (\$710.7 million); general merchandise stores (\$365.7 million); and furniture and home furnishings (\$170.6 million). Within the general merchandise stores, department store sales made up about 72 percent of the \$365.7 million in sales.

There were approximately 1,119 shopping goods establishments located within the 3-Mile Trade Area in 2004. Of those, clothing and accessory stores made up about 47 percent (527 businesses) followed by miscellaneous shopping goods (184 businesses) and general merchandise stores (139 businesses).

### Convenience Goods

There were approximately 2,271 convenience goods stores located in the Primary Trade Area in 2002 (see Table 3-15). Approximately 65 percent of those stores were food stores, and the majority of food stores (80 percent) were supermarkets and grocery stores as opposed to smaller businesses such as convenience stores, meat and fish markets, bakeries, and candy shops.

**Table 3-15**

**Estimated Convenience Goods Sales and Number of Establishments: Bronx Terminal Market 3-Mile Trade Area and Primary Trade Area, 2002**

NAICS	Business Description	3-Mile Trade Area		Primary Trade Area	
		No. of Establishments	Sales (Millions)	No. of Establishments	Sales (Millions)
	<b>Total Retail</b>	<b>3,936</b>	<b>\$ 4,748.3</b>	<b>6,253</b>	<b>\$ 7,651.6</b>
<b>445</b>	<b>Food Stores</b>	<b>980</b>	<b>1,147.7</b>	<b>1,467</b>	<b>1,617.6</b>
44511	Supermarkets & Grocery Stores	874	1,093.4	1,177	1,502.8
<b>446</b>	<b>Health &amp; Personal Care Stores</b>	<b>399</b>	<b>735.3</b>	<b>568</b>	<b>1,273.5</b>
<b>4453</b>	<b>Beer, Wine, &amp; Liquor Stores</b>	<b>99</b>	<b>78.0</b>	<b>152</b>	<b>118.1</b>
<b>4531</b>	<b>Florists</b>	<b>31</b>	<b>10.3</b>	<b>51</b>	<b>14.9</b>
<b>451212</b>	<b>News Dealers &amp; Newsstands</b>	<b>24</b>	<b>NA</b>	<b>33</b>	<b>NA</b>
	<b>TOTAL CONVENIENCE GOODS</b>	<b>1,533</b>	<b>1,971.3</b>	<b>2,271</b>	<b>3,024.1</b>
<b>Note:</b> All dollar values are presented in 2005 dollars. NA = Not Available; the 2002 Census of Retail Trade suppresses sales data for categories with low establishment counts.					
<b>Source:</b> 2002 Census of Retail Trade and Claritas, Inc. 2004 Retail SIC Summary data.					

Retail sales at convenience goods stores in the Primary Trade Area totaled approximately \$3.0 billion in 2004. Approximately 53 percent of the convenience goods sales (\$1.6 billion) were attributable to food stores, and 93 percent of all food sales (\$1.5 billion) were attributable to supermarkets and grocery stores.

The 3-Mile Trade Area contained approximately 1,533 convenience goods businesses in 2002, of which 980 (or 64 percent) were food stores. Supermarkets and grocery stores represent approximately 95 percent of all food stores, with 874 establishments located within the 3-Mile Trade Area.

In 2002, the 3-Mile Trade Area had approximately \$2.0 billion in convenience goods sales that accounted for about 42 percent of all retail sales in the trade area. Within the convenience goods category, 58 percent of the sales or \$1.1 billion came from businesses selling food products such as meat, seafood, fruit and vegetables, dairy products, and baked goods. With 95 percent of food store sales, grocery stores and supermarkets made up approximately \$1.01 billion of the \$1.15 billion in estimated food sales. The second largest contributors to convenience goods sales were health and personal care stores, which made \$735 million in sales in 2002.

### Eating & Drinking

The eating and drinking category includes retail establishments engaged in selling prepared food and drinks for consumption on the premises. As shown in Table 3-16, there were approximately 1,833 eating and drinking establishments located in the Primary Trade Area in 2002. Sales at these stores totaled approximately \$966 million, representing about 13 percent of total retail sales in the trade area.

**Table 3-16**

**Estimated Eating & Drinking Sales and Number of Establishments: Bronx Terminal Market 3-Mile Trade Area and Primary Trade Area, 2002**

NAICS	Business Description	3-Mile Trade Area		Primary Trade Area	
		No. of Establishments	Sales (Millions)	No. of Establishments	Sales (Millions)
	<b>Total Retail</b>	<b>3,936</b>	<b>\$ 4,748.3</b>	<b>6,253</b>	<b>\$ 7,651.6</b>
<b>722</b>	<b>Eating &amp; Drinking Places</b>	<b>1,173</b>	<b>\$ 680.9</b>	<b>1,833</b>	<b>\$ 966.0</b>
<b>Note:</b> All dollar values are presented in 2005 dollars. <b>Source:</b> 2002 Census of Retail Trade and Claritas, Inc. 2004 Retail SIC Summary data.					

Within the 3-Mile Trade Area, approximately 1,173 eating and drinking establishments had sales of about \$681 million in 2002. This represents almost 14 percent of total retail sales in the 3-Mile Trade Area. Sales at eating places such as fast food and sit-down restaurants made up the vast majority (close to 99 percent) of sales at eating and drinking places.

### Building Materials

The building materials group includes retail establishments primarily engaged in selling lumber and other building materials; paint, glass, and wallpaper; hardware; nursery; lawn and garden supply; and mobile homes. As shown in Table 3-17, there were approximately 185 building materials and garden supply stores located in the Primary Trade Area in 2002, and sales at those stores totaled approximately \$332 million. Approximately 44 percent (\$146 million) of the sales came from lumber and other building materials. Sales data for other sub-categories could not be presented for the northern Manhattan portion of the trade areas due to low establishment count.

Within the smaller 3-Mile Trade Area, approximately 125 building materials and garden supply stores had sales totaling approximately \$164.8 million in 2002. About 47 percent (\$77.4 million) of those sales came from selling lumber and other building materials.

Approximately 68 percent of all building materials and garden supply stores within the Primary Trade Area are located within the smaller 3-Mile Trade Area. This was the largest proportion among all of the major retail categories; overall, approximately 63 percent of all retail stores in the Primary Trade Area are located within the smaller 3-Mile Trade Area.

**Table 3-17**

**Estimated Building Materials Sales and Number of Establishments: Bronx Terminal Market 3-Mile and Primary Trade Area, 2002**

NAICS	Business Description	3-Mile Trade Area		Primary Trade Area	
		No. of Establishments	Sales (Millions)	No. of Establishments	Sales (Millions)
	<b>Total Retail</b>	<b>3,936</b>	<b>\$ 4,748.3</b>	<b>6,253</b>	<b>\$ 7,651.6</b>
<b>444</b>	<b>Building Materials, Garden Supply, &amp; Mobile Homes</b>	<b>125</b>	<b>164.8</b>	<b>185</b>	<b>332.0</b>
44419	Lumber & Other Building Materials	35	77.4	61	146.1
44412	Paint & Wallpaper	9	NA	12	NA
44413	Hardware Stores	76	NA	105	NA
4442	Retail Nurseries & Garden	1	0.5	4	1.6
<b>Note:</b> All dollar values are presented in 2005 dollars. NA = Not Available; the 2002 Census of Retail Trade suppresses sales data for categories with low establishment counts.					
<b>Source:</b> 2002 Census of Retail Trade and Claritas, Inc. 2004 Retail SIC Summary data.					

### *Capture Rates*

Capture rates are measures of business activity in a trade area, indicating the percentage of consumer expenditures for retail goods that are being “captured” by retailers in the trade area. Typically, a primary trade area generates 70 to 80 percent of the sales in a shopping center or major retail concentration.<sup>1</sup> If the total sales in the trade area are much lower than the area’s expenditure potential, then residents are spending a large portion of their available dollars outside of the trade area, and the capture rate is low. If sales are closer in value to expenditure potential, then area residents are likely spending a higher proportion of their available resources within the area, and the capture rate is high. However, capture rates are also affected by money flowing into an area from people who do not live in that area, such as employees or visitors. Some of the sales in the Bronx, for example, may be from people living in other New York City boroughs, Westchester County, and elsewhere, shopping at stores in the Bronx. It is not possible to know exactly who (residents or nonresidents) is spending money in the area. Therefore, a high capture rate may be indicative of an area with a high proportion of destination retail, i.e., retail that will attract customers from greater distances in order to compare price, quality, and the selection of merchandise.

Despite these uncertainties about the origin of sales in any particular trade area, comparing expenditure and sales data provides a good indication of how much of a trade area’s household expenditure potential is being captured by trade area retailers. Capture rates for the Primary Trade Area and 3-Mile Trade Area are presented below.

<sup>1</sup> Shopping Center Development Handbook, Third Edition, Urban Land Institute, Washington, D.C., 1999.

### Primary Trade Area

As shown in Table 3-18, total retail sales for the categories analyzed in the Primary Trade Area were estimated to be \$6.3 billion. Retail expenditures for those categories, on the other hand, were roughly \$13.8 billion, implying that trade area stores are capturing only about 46 percent of the existing expenditure potential. This indicates that Primary Trade Area residents are making a substantial portion of their retail purchases outside of the area, which may include Manhattan, Queens, and Brooklyn, as well as Westchester County and New Jersey. Anecdotal information from residents in the Primary Trade Area indicates a pattern of shopping in large-scale retailers, including department stores and wholesale clubs, located just outside the Primary Trade Area, since many of these retailers do not currently have a presence in the Bronx or northern Manhattan.

**Table 3-18**  
**Estimated Capture Rates for Competitive Retail Stores**  
**in the Primary Trade Area, 2005**

Category	Primary Trade Area Retail Expenditure (Millions of 2005 Dollars)	Primary Trade Area Retail Sales (Millions of 2005 Dollars)	Capture Rate
Shopping Goods	\$ 4,518	\$ 2,104	46.6%
<i>Department Stores</i>	\$ 1,424	\$ 385	27.0%
Convenience Goods	\$ 6,123	\$ 3,024	49.4%
<i>Food Stores</i>	\$ 3,551	\$ 1,503	42.3%
Eating & Drinking	\$ 2,743	\$ 966	35.2%
Building Materials	\$ 382	\$ 186	48.7 %
Total	\$ 13,766	\$ 6,280	45.6%
<b>Notes:</b> All dollar values are presented in 2005 dollars. <b>Sources:</b> Retail expenditure data from Claritas, Inc. 2004 Retail SIC Summary data and 2004 Consumer Spending Patterns data; retail sales based on 2002 Census of Retail Trade and Claritas, Inc. 2004 Retail SIC Summary data.			

The overall capture rate for convenience goods in the Primary Trade Area (49.4 percent) was slightly higher than it was for shopping goods (46.6 percent) or eating and drinking places (35.2 percent), and the capture rate for food stores was 42.3 percent. These are unusually low rates for convenience goods and food stores, since in general, residents are likely to buy a large proportion of their groceries, personal care items, housekeeping supplies, and over-the-counter prescription drugs at stores close to home. A convenience goods capture rate of only 49 percent indicates that Primary Trade Area residents are making a substantial proportion of their convenience goods purchase outside of the area.

Similarly, department stores of any type, i.e., full-line, off-price, or discount, have little presence in the Primary Trade Area. Currently the existing department stores are capturing 27 percent of the expenditure potential for department stores in the Primary Trade Area. A comparison of data from the Census of Population and the Census of Retail Trade can help explain the substantial outflow of department store expenditures from the Primary Trade Area. The data indicate that there is one department store for every 225,000 residents in the Primary Trade Area. In comparison, neighboring Westchester County has one department store for every 55,000 residents. Bergen County, New Jersey, a short ride across the George Washington Bridge from



the Primary Trade Area has one department store for every 40,800 residents. Even within New York City the ratios of department stores per capita are higher. For example, Staten Island has one department store for every 92,000 residents, and Queens has one department store for every 185,000 residents.

The sources and organization of the retail expenditure data used for the analysis of building materials makes it difficult to directly compare sales and expenditure potential in this category. However, two broad categories of household expenditures—“household repairs” and “miscellaneous household goods”—capture most of the goods that would be included in the building materials category (as well as some services that would not be included), and provide a general indication of how much money households in the Primary Trade Area are spending on building materials.<sup>1</sup> Based on 2002 Census of Retail Trade data, sales for building materials typically purchased by household consumers in the Primary Trade Area totaled approximately \$186 million (in 2005 dollars)—less than half the expenditure potential. The remaining retail sales in the building material category (approximately \$146 million) are comprised of lumber and other building materials, a vast majority of which is purchased by contractors, whose expenditures are not included in the household expenditure-based figure of \$186 million. This is likely due to the location of several large building materials and contractor supply retailers in the Primary Trade Area.

### 3-Mile Trade Area

The capture rates for the 3-Mile Trade Area were higher than the capture rates for the Primary Trade Area. This is likely attributable to the presence of major retail concentrations in the 3-Mile Trade Area, and the comparatively low percentage of auto ownership among the households in the 3-Mile Trade Area. As described earlier, according to the 2000 Census, 24.1 percent of households in the 3-Mile Trade Area have access to at least one car, compared to 38.4 percent of households in the Bronx as a whole. Key retail concentrations in the Bronx portion of the 3-Mile Trade Area include Fordham Road, East 138th Street, East 161st Street, including the Concourse Plaza Shopping Center, and The Hub in the vicinity of East 149th Street. Major shopping centers in the Manhattan portion of the 3-Mile Trade Area include East 116th Street and Third Avenue in East Harlem, West 116th and West 181st Streets, East and West 125th Street, Broadway, Adam Clayton Powell, Frederick Douglass, and Malcolm X Boulevards in Central Harlem, and Dyckman Street in northern Manhattan. In addition, because of the intensity of retail in some of these areas, and their identity with particular ethnic and cultural groups, such as the Hispanic community in the East Harlem, the West African community in Central Harlem, and the Dominican community in Washington Heights, these concentrations of retail stores likely draw a substantial number of shoppers from outside of the 3-Mile Trade Area.

As shown in Table 3-19, the overall retail capture rate for the 3-Mile Trade Area is 58 percent, approximately 12.5 percentage points higher than in the larger Primary Trade Area. Still, the capture rates indicate that residents of the 3-Mile Trade Area are making approximately 36.5 percent of their shopping goods purchases and 41.2 percent of their convenience goods

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<sup>1</sup> The household repairs category includes expenditures on items such as construction materials, electric supplies, hard surface floor labor and materials, landscaping materials, paint and wallpaper supplies, and plumbing and water heater labor and materials. The miscellaneous household equipment category includes expenditures on power tools, hand tools, fresh flowers and potted plants, outdoor equipment, lawn and garden supplies, rental and repair of lawn mowing equipment and yard machinery.

**Table 3-19**

**Estimated Capture Rates for Competitive Retail Stores  
in the 3-Mile Trade Area, 2005**

<b>Category</b>	<b>3-Mile Retail Expenditures (Millions of 2005 Dollars)</b>	<b>3-Mile Retail Sales (Millions of 2005 Dollars)</b>	<b>Capture Rate</b>
Shopping Goods	\$ 2,319	\$ 1,473	63.5%
<i>Department Stores</i>	\$ 747	\$264	35.3%
Convenience Goods	\$ 3,350	\$ 1,971	58.8%
<i>Food Stores</i>	\$ 1,986	\$ 1,093	55.0%
Eating & Drinking	\$ 1,425	\$ 681	47.8%
Total	\$ 7,095	\$ 4,125	58.1%
<b>Note:</b> All dollar values are presented in 2005 dollars. <b>Source:</b> Retail expenditure data from Claritas, Inc. 2004 Retail SIC Summary data and 2004 Consumer Spending Patterns data; retail sales based on 2002 Census of Retail Trade and Claritas, Inc. 2004 Retail SIC Summary data.			

purchases outside of the 3-Mile Trade Area. Unlike the Primary Trade Area, the 3-Mile Trade Area is capturing a greater proportion of shopping goods spending potential than convenience goods spending potential. In large part this is the result of several major retail concentrations within the 3-Mile Trade Area that offer large selections of shopping goods stores, particularly The Hub and Fordham Road, as well as the presence of 6 of the 8 department stores located in the Primary Trade Area.

The 3-Mile Trade Area is capturing a higher amount of food store sales—55.0 percent—within the Primary Trade Area, which as a whole is capturing 42.3 percent of food store sales. This higher food store capture rate is partially attributable to the presence of several supermarkets along the eastern and northern borders of the 3-Mile Trade Area, which are patronized by non-3-Mile Trade Area residents as well as 3-Mile Trade Area residents, thereby driving up the 3-Mile Trade Area food sales. These include three large supermarkets, specifically an Associated Supermarket on Jerome Avenue near Fordham Road, Pathmark on East 174th Street near the Sheridan Expressway, and Western Beef near the intersection of Southern Boulevard and Boston Road, as well as four smaller supermarkets, including a C-Town (Southern Boulevard and Longwood Avenue), and Fine Fare (East 163rd Street just west of the Bruckner Expressway) in the eastern portion of the study area, and a C-Town (University Avenue near West 184th Street) and a Bravo supermarket (Valentine Avenue south of Fordham Road) in the northern portion of the study area.

A capture rate was not estimated for the building materials category within the 3-Mile Trade Area, since the Proposed Project would likely include a home improvement store that would draw the vast majority of its market from outside the 3-Mile Trade Area. Those building materials stores currently located in the 3-Mile Trade Area deal primarily with contractors, building superintendents, and building maintenance staff. These stores include, among others, Tiffany Lumber on East 165th Street, Bruckner Lumber at 259 Bruckner Boulevard, Starlite Paint & Varnish at 724 East 140th Street, American Building Supply at 150 Bruckner Boulevard, Butler Lumber at 2311 Third Avenue near East 125th Street, and Wood-O-Rama at 238 West 108th Street in Manhattan just outside the Primary Trade Area. All of these stores primarily sell construction-related products such as lumber, sheetrock, doors, windows, flooring

and roofing, etc., and attract professional builders and maintenance contractors from a catchment area that is likely to be broader than the 3-Mile Trade Area.

In most cases, contemporary home improvement stores are geared to “do-it-yourself” households with the need to improve homes and apartments that they own. Apartment renters are less likely to purchase home improvement items, such as sheetrock, flooring, or bathroom and kitchen fixtures. Within the 3-Mile Trade Area home ownership is extremely low, i.e., 6.9 percent, compared to 16.0 percent in the Primary Trade Area, and 30.2 percent in the city as a whole. In addition, residents in the 3-Mile Trade Area have relatively low incomes, approximately \$26,500 compared to \$33,800 in the Primary Trade Area and \$44,819 in the city as a whole. It is anticipated that the customer base for the home improvement store in the Proposed Project would come principally from the portions of Primary Trade Area outside the 3-Mile Trade Area, including neighborhoods in the north Bronx, such as Riverdale and Fieldston, and in northern Manhattan, such as Inwood, where home ownership and incomes are higher. The project site is readily accessible to these neighborhoods via the Major Deegan Expressway and the Harlem River Drive.

### *Major Retail Concentrations in the 3-Mile Trade Area*

Surveys of major retail concentrations in the trade area were conducted in June 2004 and June 2005 to determine the composition, character, and condition of the existing retail inventory. These field surveys helped identify retail concentrations that could possibly be affected by the Proposed Project, including those that are more convenience- or neighborhood-oriented, those with larger proportions of shopping goods, and those more specialized in nature, such as primarily selling to ethnic or cultural markets. A total of 19 major retail concentrations were identified within the 3-Mile Trade Area covering portions of the Central and South Bronx and northern Manhattan. These concentrations, shown in Figure 3-2, were surveyed in detail, i.e., door-to-door, to provide a baseline of retail conditions for the impact analysis.

The survey data is organized according to retail codes of SIC established by the U.S. Department of Commerce, Bureau of the Census, that categorizes establishments as shopping goods, convenience goods, neighborhood services, building materials, auto-related trade, and vacant stores. Examples of shopping goods stores include: general merchandise, or goods commonly found in department stores, including discount department stores such as 99 cents stores; apparel and accessories, including men’s, women’s, children’s, and family clothing and shoes; furniture and home furnishings, including furniture and floor coverings, home furnishings, household appliances, TV, radio, electronics, records and tapes, computers and software; and miscellaneous shopping goods, such as sporting goods, books, stationery, and jewelry. Examples of convenience goods stores include a variety of food stores, such as supermarkets, grocery stores, bakeries, meat and fish markets, etc., as well as drug stores and newsstands.

*138th Street (Between Alexander and Jackson Avenues).* As shown in Table 3-20, 138th Street in the Bronx has a total of 153 storefronts between Alexander Avenue to the west and Jackson Avenue to the east. This retail strip primarily serves the surrounding residential community with convenience goods and neighborhood services that together account for nearly half of the total storefronts. Retail activity is interrupted by large public housing projects, including the Mill Brook Houses and the John Purroy Mitchell Houses. Of the 35 convenience goods stores that

**Table 3-20**

**138th Street Between Jackson and Alexander Avenues**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>30</b>	<b>19.7%</b>	<b>CONVENIENCE GOODS</b>	<b>35</b>	<b>22.4%</b>
<b>General Merchandise Stores</b>	5	3.3%	<b>Food Stores</b>	26	16.4%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	16	
Department Stores, discount national chains			Supermarkets	1	
Miscellaneous general merchandise stores	5		Meat and fish markets	2	
<b>Apparel and Accessory Stores</b>	9	5.9%	Retail bakeries	4	
Men's and boy's clothing	2		Fruit and vegetable markets	2	
Women's and girl's clothing	2		Candy, nut, and confectionary	1	
Family clothing	1		Miscellaneous/specialty foods		
Children's clothing	1		<b>Miscellaneous Convenience Goods</b>	9	5.9%
Shoes	3		Drug and proprietary stores	6	
Other apparel and accessories			Liquor stores		
<b>Furniture, Home Furnishings, and Equipment Stores</b>	9	4.6%	Florists	1	
Furniture stores	2		Cigar stores and stands	1	
Floor covering stores	1		Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores	2		Photocopy stores		
Household appliance stores			Photo development	1	
Audio and video electronics (beepers, cell phones)	1		Other miscellaneous convenience goods		
Records and musical instruments	3		<b>EATING AND DRINKING PLACES</b>	<b>19</b>	<b>12.5%</b>
Computer			Restaurants/Luncheonettes	8	
<b>Miscellaneous Shopping Goods Stores</b>	7	4.6%	Refreshments/"Fast food" places	11	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)		
Stationery			<b>NEIGHBORHOOD SERVICES</b>	<b>40</b>	<b>22.4%</b>
Jewelry	1		Video rentals		
Hobby, toy, and games	1		Banks		
Camera and photographic supplies			Cleaners and tailors	2	
Gifts, novelties, and souvenirs	1		Hair and nail care	15	
Luggage and leather goods			Laundry	2	
Sewing, needlework, and piece goods			Travel agencies	2	
Religious articles			TV/Audio/Appliance repair		
Optical goods			Shoe repair	1	
Used merchandise			Medical offices	8	
Other misc. shopping goods (pawn shop)	4		Other professional offices (check cashing, taxes)	6	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>1</b>	<b>0.7%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware	1		Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services	2	
<b>AUTO-RELATED TRADE</b>	<b>2</b>	<b>1.3%</b>	Church	1	
Motor vehicle dealers			Communications Center	1	
Auto supplies	1				
Gasoline and service stations					
Car rental					
Paid Parking	1				
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>153</b>	<b>100.0%</b>	Convenience Goods	35	22.4%
Shopping Goods	30	19.7%	Eating and Drinking Places	19	12.5%
Blding Mtr'ls, Hardware, and Garden Supply	1	0.7%	Neighborhood Services	40	22.4%
Auto-Related	2	1.3%	Vacant Storefronts	26	21.1%
<b>Source:</b> AKRF, Inc., Summer 2004.					

represent 23 percent of all storefronts, 26 are food stores, including 16 small groceries and bodegas and only 1 supermarket. Neighborhood service establishments represent about 26 percent of all storefronts on this strip, and primarily provide hair and nail care, laundromats, and medical and other professional offices. There are 30 shopping goods retailers, or about 20 percent of the inventory, primarily selling apparel and accessories, and home furnishings, including records and musical instruments. Eating and drinking places account for about 13 percent of the total business establishments. National chains on along this strip include McDonald's and Rite Aid. Vacancies are high, with 26 vacant storefronts, representing about 17 percent of the inventory. Some of the more recent additions to the retail inventory along East 138th Streets include a credit union, grocery, sign shop, hair braiding and two medical offices in renovated storefronts between St. Ann's Avenue and Cypress Avenue.

*The Hub: Third Avenue and 149th Street.* One of the most vibrant commercial areas in the Bronx is The Hub, located around the intersection of 149th Street and Third Avenue. It is both a center of retail activity and a transportation hub, well serviced by subway lines and buses. Five streets intersect, creating an area extremely trafficked by cars, buses, and pedestrians. Both Third Avenue and 149th Street are busy thoroughfares that provide direct access to Manhattan via the Third Avenue Bridge and the 145th Street Bridge, respectively. Although retail activity is located primarily on Third Avenue and 149th Street, it spills over to Melrose, Westchester, and Willis Avenues.

The Hub is oriented toward destination shopping. The field survey observed 213 storefronts in The Hub, of which 109, or 51 percent are shopping goods stores (see Table 3-21). Among these are 42 apparel and accessory stores (mostly women's and family clothing), 29 furniture, home furnishings or equipment stores (mostly furniture or audio and video electronics), 30 miscellaneous shopping goods stores (primarily jewelry and other miscellaneous shopping goods), and 8 discount general merchandise stores. Neighborhood services account for 16 percent of total storefronts (34 stores), including many hair and nail care establishments, medical offices, and other neighborhood services. There are 13 convenience goods stores, mostly small grocery stores and bodegas and meat and fish markets, which account for about 6 percent of the commercial inventory. Eating and drinking places make up about 9 percent of total storefronts in the area. Thirty-four vacant storefronts were observed during the survey, representing about 16 percent of the storefronts. Stores are densely packed in this area, and there are many large stores, particularly discount stores. Most of the retail stores are local chains, including Conway and Jimmy Jazz. National chains are less common, but include Modell's, Jennifer Convertible, Fleet, White Castle, and McDonald's.

*161st Street (Between River and Morris Avenues).* 161st Street is a heavily trafficked area due to the presence of Bronx Borough Hall, several courts and other municipal buildings, law offices, retail stores (including the Concourse Plaza Mall), and high density residential development in Concourse Village and along the Grand Concourse. In addition, Yankee Stadium is located close by at 161st Street and River Avenue. The location of the court buildings and the shopping mall, combined with the width of the Grand Concourse, effectively divides this commercial area in half, with the more neighborhood-oriented retail located at either end of the strip.

**Table 3-21**  
**The Hub/149th Street**  
**Between Brook and Morris Avenues**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>109</b>	<b>51.2%</b>	<b>CONVENIENCE GOODS</b>	<b>13</b>	<b>6.1%</b>
<b>General Merchandise Stores</b>	<b>8</b>	<b>3.8%</b>	<b>Food Stores</b>	<b>6</b>	<b>2.8%</b>
Department Stores, conventional national chains			Grocery stores, delis, bodegas	4	
Department Stores, discount national chains			Supermarkets		
Miscellaneous general merchandise stores	8		Meat and fish markets	2	
<b>Apparel and Accessory Stores</b>	<b>42</b>	<b>19.7%</b>	Retail bakeries		
Men's and boy's clothing	7		Fruit and vegetable markets		
Women's and girl's clothing	13		Candy, nut, and confectionary		
Family clothing	9		Miscellaneous/specialty foods		
Children's clothing	3		<b>Miscellaneous Convenience Goods</b>	<b>7</b>	<b>3.3%</b>
Shoes	5		Drug and proprietary stores	4	
Other apparel and accessories	5		Liquor stores	1	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	<b>29</b>	<b>13.6%</b>	Florists		
Furniture stores	11		Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops	1	
Miscellaneous home furnishing stores	2		Photocopy stores		
Household appliance stores			Photo development	1	
Audio and video electronics (beepers, cell phones)	13		Other miscellaneous convenience goods		
Records and musical instruments	3		<b>Eating and Drinking Places</b>	<b>19</b>	<b>8.9%</b>
Computer			Restaurants/Luncheonettes	9	
<b>Miscellaneous Shopping Goods Stores</b>	<b>30</b>	<b>14.1%</b>	Refreshments/"Fast food" places	10	
Sporting goods and bicycle	1		Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)		
Stationery			<b>Neighborhood Services</b>	<b>34</b>	<b>16.0%</b>
Jewelry	9		Video rentals		
Hobby, toy, and games	1		Banks	5	
Camera and photographic supplies			Cleaners and tailors	1	
Gifts, novelties, and souvenirs	2		Hair and nail care	9	
Luggage and leather goods			Laundry		
Sewing, needlework, and piece goods			Travel agencies		
Religious articles			TV/Audio/Appliance repair	1	
Optical goods	4		Shoe repair		
Used merchandise			Medical offices	6	
Other misc. shopping goods	13		Other professional offices (ins., lawyer)	3	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>1</b>	<b>0.5%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services	1	
Hardware	1		Health/Fitness club	1	
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services (check cashing, pawn shop, photo studio)	7	
<b>AUTO-RELATED TRADE</b>	<b>3</b>	<b>1.4%</b>	Communications Center		
Motor vehicle dealers					
Auto supplies	2				
Gasoline and service stations					
Paid Parking	1				
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>213</b>	<b>100.0%</b>	Convenience Goods	13	6.1%
Shopping Goods	109	51.2%	Eating and Drinking Places	19	8.9%
Blding Mtr'ls, Hardware, and Garden Supply	1	0.5%	Neighborhood Services	34	16.0%
Auto-Related	3	1.4%	Vacant Storefronts	34	16.0%
<b>Source:</b> AKRF, Inc., Summer 2004					

As shown in Table 3-22, 161st Street between Morris and River Avenues has a total of 51 storefronts, excluding Concourse Plaza Mall. Neighborhood services account for about 31 percent of total storefronts, or 15 establishments that are primarily legal offices. Shopping goods account for 10 percent of the total storefronts with 10 stores. Eating and drinking places also account for 25.5 percent of the total, with 13 restaurants and fast food places (not counting Concourse Plaza) that primarily serve the dense office activity in the area. Convenience goods account for only 10 percent of the total storefronts with 5 stores. There are only six vacant storefronts on 161st Street, which represent 12 percent of the total commercial inventory.

*Concourse Plaza Mall.* Concourse Plaza Mall is a retail shopping center located on 161st Street just east of the Grand Concourse in the Bronx. The shopping center is essentially a strip mall, anchored by a Food Bazaar supermarket, food court, and a multiplex movie theater. Surface parking is provided in front of the stores, with a lower level parking deck. As shown in Table 3-23, the shopping center has a total of 17 establishments, with shopping goods stores sandwiched between the supermarket and the food court/movie theaters. Altogether, there are 11 shopping goods stores that represent about 65 percent of the tenant mix, including 7 apparel and accessory stores, most of which are shoe stores, such as Foot Action and Payless shoes. There are two neighborhood service establishments, representing about 12 percent of the tenant mix, including a bank and medical office.

*Fordham Road (Between Webster Avenue and the Major Deegan Expressway).* Fordham Road between Webster Avenue and the Major Deegan Expressway is one of the major shopping destinations in the Bronx, with a total of 238 stores in a range of sizes from small to large. There are 140 shopping goods stores representing 59 percent of the 238 total storefronts (see Table 3-24). Shopping goods retailers include 70 apparel and accessory stores, such as Foot Locker, Strawberry, Modell's, the Gap, and Parade of Shoes. There are 29 furniture, home furnishings, and equipment stores, more than half of which are electronics stores selling cell phones, and 34 miscellaneous shopping goods stores, including 17 jewelry shops. There are 33 neighborhood service establishments that constitute about 14 percent of storefronts, with more than half being hair and nail care stores, professional offices and banks. Convenience goods account for only 8 percent of the storefronts, including 9 smaller groceries and bodegas. Eating and drinking places make up about 10 percent of the storefronts; 20 of those stores are fast food restaurants such as McDonalds, Burger King, Taco Bell, Pizza Hut, and Popeyes. In addition to shopping and convenience goods retailers the strip has 9 auto-related stores, most of which are situated at the west end of Fordham Road near the Major Deegan Expressway. The vacancy rate is relatively low with 15 vacant storefronts, representing 6 percent of the total commercial inventory.

*East 116th Street Between Second and Madison Avenues.* Located in East Harlem in Manhattan, East 116th Street is an active retail strip providing a variety of shopping goods, neighborhood services, and convenience goods for local residents. As shown in Table 3-25, there are a total of 129 storefronts along East 116th Street between Second and Madison Avenues. The elevated tracks of the Metro North Rail Road effectively separate retail activity along this strip. The blocks east of Park Avenue are characterized by more intense activity with retail and neighborhood services located at the street level and second floors, and the block west of Park Avenue are characterized by a distinctly lighter concentration of stores, in addition to 3 vacant lots. Many stores market primarily to the local Hispanic community.

**Table 3-22**  
**161st Steet Between Morris and River Avenues**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>10</b>	<b>19.6%</b>	<b>CONVENIENCE GOODS</b>	<b>5</b>	<b>9.8%</b>
<b>General Merchandise Stores</b>	0	0.0%	<b>Food Stores</b>	3	5.9%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	2	
Department Stores, discount national chains			Supermarkets		
Miscellaneous general merchandise stores			Meat and fish markets	1	
<b>Apparel and Accessory Stores</b>	5	9.8%	Retail bakeries		
Men's and boy's clothing	1		Fruit and vegetable markets		
Women's and girl's clothing	1		Candy, nut, and confectionary		
Family clothing	1		Miscellaneous/specialty foods		
Children's clothing			<b>Miscellaneous Convenience Goods</b>	2	3.9%
Shoes	1		Drug and proprietary stores		
Other apparel and accessories	1		Liquor stores	1	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	2	3.9%	Florists		
Furniture stores			Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores			Photocopy stores		
Household appliance stores			Photo developing	1	
Audio and video electronics (beepers, cell phones)	1		Other miscellaneous convenience goods		
Records and musical instruments	1		<b>Eating and Drinking Places</b>	<b>13</b>	<b>25.5%</b>
Computer			Restaurants/Luncheonettes	5	
<b>Miscellaneous Shopping Goods Stores</b>	3	5.9%	Refreshments/"Fast food" places	8	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)		
Stationery	2		<b>Neighborhood Services</b>	<b>15</b>	<b>29.4%</b>
Jewelry			Video rentals		
Hobby, toy, and games			Banks	3	
Camera and photographic supplies			Cleaners and tailors		
Gifts, novelties, and souvenirs			Hair and nail care	1	
Luggage and leather goods			Laundry		
Sewing, needlework, and piece goods			Travel agencies		
Religious articles			TV/Audio/Appliance repair		
Optical goods			Shoe repair		
Used merchandise			Medical offices		
Other misc. shopping goods (pawn shop)	1		Other professional offices (law offices, tax)	10	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>0</b>	<b>0.0%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware			Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services (pawn shop)	1	
<b>AUTO-RELATED TRADE</b>	<b>2</b>	<b>3.9%</b>	Communications Center		
Motor vehicle dealers					
Auto supplies					
Gasoline and service stations	1				
Car rental					
Paid Parking	1				
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>51</b>	<b>100.0%</b>	Convenience Goods	5	9.8%
Shopping Goods	10	19.6%	Eating and Drinking Places	13	25.5%
Blding Mtr'ls, Hardware, and Garden Supply	0	0.0%	Neighborhood Services	15	29.4%
Auto-Related	2	3.9%	Vacant Storefronts	6	11.8%
<b>Source:</b> AKRF, Inc., Summer 2004.					



**Table 3-23**  
**Concourse Plaza Mall, Bronx**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>11</b>	<b>64.7%</b>	<b>CONVENIENCE GOODS</b>	<b>3</b>	<b>17.6%</b>
<b>General Merchandise Stores</b>	1	5.9%	<b>Food Stores</b>	1	5.9%
Department Stores, conventional national chains			Grocery stores, delis, bodegas		
Department Stores, discount national chains			Supermarkets	1	
Miscellaneous general merchandise stores	1		Meat and fish markets		
<b>Apparel and Accessory Stores</b>	7	41.2%	Retail bakeries		
Men's and boy's clothing	1		Fruit and vegetable markets		
Women's and girl's clothing	1		Candy, nut, and confectionary		
Family clothing	1		Miscellaneous/specialty foods		
Children's clothing	1		<b>Miscellaneous Convenience Goods</b>	2	11.8%
Shoes	3		Drug and proprietary stores	1	
Other apparel and accessories			Liquor stores		
<b>Furniture, Home Furnishings, and Equipment Stores</b>	2	11.8%	Florists		
Furniture stores	1		Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops	1	
Miscellaneous home furnishing stores			Photocopy stores		
Household appliance stores			Photo development		
Audio and video electronics (beepers, cell phones)	1		Other miscellaneous convenience goods		
Records and musical instruments			<b>Eating and Drinking Places</b>	1	5.9%
Computer			Restaurants/Luncheonettes		
<b>Miscellaneous Shopping Goods Stores</b>	1	5.9%	Refreshments/"Fast food" places	1	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)		
Stationery			<b>Neighborhood Services</b>	2	11.8%
Jewelry			Video rentals		
Hobby, toy, and games			Banks	1	
Camera and photographic supplies			Cleaners and tailors		
Gifts, novelties, and souvenirs			Hair and nail care		
Luggage and leather goods			Laundry		
Sewing, needlework, and piece goods			Travel agencies		
Religious articles			TV/Audio/Appliance repair		
Optical goods	1		Shoe repair		
Used merchandise			Medical offices	1	
Other misc. shopping goods			Other professional offices (check cashing, taxes)		
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>0</b>	<b>0.0%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware			Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services		
<b>AUTO-RELATED TRADE</b>	<b>0</b>	<b>0.0%</b>	Church		
Motor vehicle dealers			Communications Center		
Auto supplies					
Gasoline and service stations					
Car rental					
Pay Parking					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>17</b>	<b>100.0%</b>	Convenience Goods	3	17.6%
Shopping Goods	11	64.7%	Eating and Drinking Places	1	5.9%
Blding Mtr'ls, Hardware, and Garden Supply	0	0.0%	Neighborhood Services	2	11.8%
Auto-Related	0	0.0%	Vacant Storefronts		0.0%
<b>Source:</b> AKRF, Inc., Summer 2004.					

**Table 3-24**  
**Fordham Road Between Webster Avenue and Major Deegan Expressway**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>140</b>	<b>58.8%</b>	<b>CONVENIENCE GOODS</b>	<b>18</b>	<b>7.6%</b>
<b>General Merchandise Stores</b>	7	2.9%	<b>Food Stores</b>	10	4.2%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	9	
Department Stores, discount national chains			Supermarkets		
Miscellaneous general merchandise stores	7		Meat and fish markets	1	
<b>Apparel and Accessory Stores</b>	70	29.4%	Retail bakeries		
Men's and boy's clothing	7		Fruit and vegetable markets		
Women's and girl's clothing	21		Candy, nut, and confectionary		
Family clothing	14		Miscellaneous/specialty foods		
Children's clothing	8		<b>Miscellaneous Convenience Goods</b>	8	3.4%
Shoes	12		Drug and proprietary stores	4	
Other apparel and accessories (leather, sportswear, uniforms)	8		Liquor stores	1	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	29	12.2%	Florists	1	
Furniture stores	5		Cigar stores and stands		
Floor covering stores	1		Newsdealers and newsstands		
Drapery, curtain, and upholstery stores	2		Pet shops		
Miscellaneous home furnishing stores	2		Photocopy stores		
Household appliance stores			Photo developing	2	
Audio and video electronics (beepers, cell phones)	19		Other miscellaneous convenience goods		
Records and musical instruments			<b>Eating and Drinking Places</b>	<b>23</b>	<b>9.7%</b>
Computer			Restaurants/Luncheonettes	2	
<b>Miscellaneous Shopping Goods Stores</b>	34	14.3%	Refreshments/"Fast food" places	20	
Sporting goods and bicycle	1		Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)		
Stationery			<b>Neighborhood Services</b>	<b>33</b>	<b>13.9%</b>
Jewelry	17		Video rentals	2	
Hobby, toy, and games	1		Banks	7	
Camera and photographic supplies			Cleaners and tailors	2	
Gifts, novelties, and souvenirs	2		Hair and nail care	9	
Luggage and leather goods			Laundry	1	
Sewing, needlework, and piece goods	1		Travel agencies	1	
Religious articles			TV/Audio/Appliance repair		
Optical goods	4		Shoe repair		
Used merchandise	1		Medical offices	1	
Other misc. shopping goods (pawn shop, party store, beauty supply)	7		Other professional offices (check cashing, taxes, decorator)	7	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>0</b>	<b>0.0%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware			Health/Fitness club	1	
Retail nurseries, lawn, and garden supply stores			Car service	1	
Lumber and other building materials			Other neighborhood services (watch repair)	1	
<b>AUTO-RELATED TRADE</b>	<b>9</b>	<b>3.8%</b>	Church		
Motor vehicle dealers	1		Communications Center		
Auto supplies	3				
Gasoline and service stations	3				
Car rental					
Paid Parking	3				
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>238</b>	<b>100.0%</b>	Convenience Goods	18	7.6%
Shopping Goods	140	58.8%	Eating and Drinking Places	23	9.7%
Blding Mtr'ls, Hardware, and Garden Supply	0	0.0%	Neighborhood Services	33	13.9%
Auto-Related	9	3.8%	Vacant Storefronts	15	6.3%
<b>Source:</b> AKRF, Inc., Summer 2004.					

**Table 3-25**

**East 116th Street Between Second and Madison Avenues**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>43</b>	<b>33.3%</b>	<b>CONVENIENCE GOODS</b>	<b>21</b>	<b>16.3%</b>
<b>General Merchandise Stores</b>	2	1.6%	<b>Food Stores</b>	16	12.4%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	10	
Department Stores, discount national chains			Supermarkets	1	
Miscellaneous general merchandise stores	2		Meat and fish markets	1	
<b>Apparel and Accessory Stores</b>	16	12.4%	Retail bakeries	2	
Men's and boy's clothing	2		Fruit and vegetable markets	1	
Women's and girl's clothing	3		Candy, nut, and confectionary	1	
Family clothing	4		Miscellaneous/specialty foods		
Children's clothing			<b>Miscellaneous Convenience Goods</b>	5	3.9%
Shoes	5		Drug and proprietary stores	3	
Other apparel and accessories	1		Liquor stores		
<b>Furniture, Home Furnishings, and Equipment Stores</b>	10	7.8%	Florists	2	
Furniture stores			Cigar stores and stands		
Floor covering stores	1		Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores			Photocopy stores		
Household appliance stores			Photo development		
Audio and video electronics (beepers, cell phones)	3		Other miscellaneous convenience goods		
Records and musical instruments	6		<b>Eating and Drinking Places</b>	<b>23</b>	<b>17.8%</b>
Computer			Restaurants/Luncheonettes	10	
<b>Miscellaneous Shopping Goods Stores</b>	15	11.6%	Refreshments/"Fast food" places	13	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)		
Stationery			<b>Neighborhood Services</b>	<b>34</b>	<b>26.4%</b>
Jewelry	3		Video rentals	1	
Hobby, toy, and games	2		Banks	1	
Camera and photographic supplies			Cleaners and tailors	1	
Gifts, novelties, and souvenirs	1		Hair and nail care	7	
Luggage and leather goods			Laundry	1	
Sewing, needlework, and piece goods			Travel agencies	3	
Religious articles	2		TV/Audio/Appliance repair		
Optical goods	1		Shoe repair		
Used merchandise			Medical offices	6	
Other misc. shopping goods	6		Other professional offices (City and State officers, taxes, attorneys)	7	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>0</b>	<b>0.0%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services	1	
Hardware			Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service	2	
Lumber and other building materials			Other neighborhood services (money transfer)	2	
<b>AUTO-RELATED TRADE</b>	<b>0</b>	<b>0.0%</b>	Communications Center	2	
Motor vehicle dealers					
Auto supplies					
Gasoline and service stations					
Car rental					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>129</b>	<b>100.0%</b>	Convenience Goods	21	16.3%
Shopping Goods	43	33.3%	Eating and Drinking Places	23	17.8%
Blding Mtr'ls, Hardware, and Garden Supply	0	0.0%	Neighborhood Services	34	26.4%
Auto-Related	0	0.0%	Vacant Storefronts	18	6.2%
<b>Source:</b> AKRF, Inc., Summer 2004.					

Shopping goods are prominent on East 116th Street, featured in 43 stores or about 33 percent of the total storefronts along the strip. Of these, 16 sell apparel and accessories, such as shoes and women's clothing, including Regines and Victoria Fashions; 15 feature miscellaneous shopping goods, such as jewelry and religious articles; 2 are general merchandise stores, including the visually prominent Numero Uno Department Store; and 10 are furniture and home furnishings stores. Neighborhood services account for approximately 26 percent of storefronts, providing banking, medical and other professional services. Convenience goods account for 16 percent of total storefronts. An Associated Supermarket is located centrally on the north side of the street. Eating and drinking places account for 23 storefronts or about 18 percent of the total inventory, including a pizza shop, luncheonette, and a cuchifritos shop. There are 8 vacant storefronts, a rate of about 6 percent.

*West 116th Street Between Malcolm X and Frederick Douglass Boulevards.* The portion of West 116th Street between Malcolm X and Frederick Douglass Boulevards serves the Central Harlem community. Retail activity is concentrated on the eastern portion of this strip, anchored by the Malcolm-Shabazz Harlem Market, a covered market with vendors selling primarily shopping goods.

Overall, there are 86 storefronts located along this strip (see Table 3-26). Neighborhood services dominate the inventory with 22 stores, accounting for almost 26 percent of the storefronts. Of these, 10 provide hair and nail care, and 2 provide other neighborhood services. There are 8 convenience goods stores, making up 9 percent of the total storefront inventory. Although shopping goods stores represent only 17 percent of the total storefronts, the percentage of shopping goods retailers is likely to be higher, since the Malcolm-Shabazz Harlem Market contains several vendors selling a variety of shopping goods, including apparel and accessories and home furnishings, many of which are African goods reflective of neighborhood culture. There are a large number of vacant storefronts (29) along this strip, accounting for nearly 34 percent of total storefronts. Although the retail vacancies are relatively high, there are several vacant storefronts in the ground floor of abandoned buildings that are potential development sites, including two sites on the north side of West 116th Street between St. Nicholas Avenue and Frederick Douglass Boulevard, and one site on the south side of West 116th Street between Malcolm X Boulevard and St. Nicholas Avenue.

*Lexington Avenue (Between East 116th and 125th Streets).* Lexington Avenue between East 116th and 125th Streets is primarily oriented to neighborhood services and shopping needs. There are 59 storefronts in the retail inventory (see Table 3-27), with several mixed-use buildings. Community use of outdoor space and community gardens help to create a lively residential feel along this street.

Neighborhood services dominate this mixed-use strip, with 18 storefronts or about 31 percent of the total inventory. Of these storefronts, 8 are hair and nail care shops, 2 are other neighborhood services, 3 are professional services, and 3 are cleaners and tailors. There are 16 convenience goods stores, representing about 27 percent of total storefronts, including a liquor store and 14 food stores, consisting of 10 bodegas, 2 retail bakeries, 1 supermarket, and 1 confectionary. At the intersection with East 125th Street, the Pathmark Supermarket adds a great deal of shopping activity to the neighborhood orientation of this corridor. Shopping goods stores account for a small portion of the inventory with 11 stores, representing 18 percent of total storefronts. The number of vacancies along the strip is unusually high, with 7 vacant stores, representing nearly 12 percent of the total inventory.

**Table 3-26**

**West 116th Street Between Malcolm X and Frederick Douglas Boulevards**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>15</b>	<b>17.4%</b>	<b>CONVENIENCE GOODS</b>	<b>8</b>	<b>9.3%</b>
<b>General Merchandise Stores</b>	6	7.0%	<b>Food Stores</b>	5	5.8%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	3	
Department Stores, discount national chains			Supermarkets		
Miscellaneous general merchandise stores	6		Meat and fish markets	2	
<b>Apparel and Accessory Stores</b>	5	5.8%	Retail bakeries		
Men's and boy's clothing	1		Fruit and vegetable markets		
Women's and girl's clothing	1		Candy, nut, and confectionary		
Family clothing	2		Miscellaneous/specialty foods		
Children's clothing			<b>Miscellaneous Convenience Goods</b>	3	3.5%
Shoes			Drug and proprietary stores	1	
Other apparel and accessories	1		Liquor stores		
<b>Furniture, Home Furnishings, and Equipment Stores</b>	4	4.7%	Florists	1	
Furniture stores			Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands	1	
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores			Photocopy stores		
Household appliance stores			Photo development		
Audio and video electronics (beepers, cell phones)	4		Other miscellaneous convenience goods		
Records and musical instruments			<b>Eating and Drinking Places</b>	<b>11</b>	<b>12.8%</b>
Computer			Restaurants/Luncheonettes	10	
<b>Miscellaneous Shopping Goods Stores</b>	0	0.0%	Refreshments/"Fast food" places	1	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)		
Stationery			<b>Neighborhood Services</b>	<b>22</b>	<b>25.6%</b>
Jewelry			Video rentals		
Hobby, toy, and games			Banks		
Camera and photographic supplies			Cleaners and tailors	2	
Gifts, novelties, and souvenirs			Hair and nail care	10	
Luggage and leather goods			Laundry	1	
Sewing, needlework, and piece goods			Travel agencies	1	
Religious articles			TV/Audio/Appliance repair		
Optical goods			Shoe repair	1	
Used merchandise			Medical offices	1	
Other misc. shopping goods			Other professional offices	1	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>1</b>	<b>1.2%</b>	Home improvement services		
Paint, glass, and wallpaper	1		Funeral services		
Hardware			Health/Fitness club	1	
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services (taxes, check cashing)	2	
<b>AUTO-RELATED TRADE</b>	<b>0</b>	<b>0.0%</b>	Communications Center	2	
Motor vehicle dealers					
Auto supplies					
Gasoline and service stations					
Car rental					
Pay Parking					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>86</b>	<b>100.0%</b>	Convenience Goods	8	9.3%
Shopping Goods	15	17.4%	Eating and Drinking Places	11	12.8%
Blding Mtr'ls, Hardware, and Garden Supply	1	1.2%	Neighborhood Services	22	25.6%
Auto-Related	0	0.0%	Vacant Storefronts	29	33.7%
<b>Source:</b> AKRF, Inc., Summer 2004.					

**Table 3-27**  
**Lexington Avenue Between East 116th and 125th Streets**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>11</b>	<b>18.6%</b>	<b>CONVENIENCE GOODS</b>	<b>16</b>	<b>27.1%</b>
<b>General Merchandise Stores</b>	<b>2</b>	<b>3.4</b>	<b>Food Stores</b>	<b>14</b>	<b>23.7%</b>
Department Stores, conventional national chains			Grocery stores, delis, bodegas	10	
Department Stores, discount national chains			Supermarkets	1	
Miscellaneous general merchandise stores	2		Meat and fish markets		
<b>Apparel and Accessory Stores</b>	<b>4</b>	<b>6.8%</b>	Retail bakeries	2	
Men's and boy's clothing			Fruit and vegetable markets		
Women's and girl's clothing	1		Candy, nut, and confectionary	1	
Family clothing	1		Miscellaneous/specialty foods		
Children's clothing			<b>Miscellaneous Convenience Goods</b>	<b>2</b>	<b>3.4%</b>
Shoes	1		Drug and proprietary stores	1	
Other apparel and accessories	1		Liquor stores	1	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	<b>3</b>	<b>5.1%</b>	Florists		
Furniture stores			Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores			Photocopy stores		
Household appliance stores			Photo development		
Audio and video electronics (beepers, cell phones)	2		Other miscellaneous convenience goods		
Records and musical instruments	1		<b>Eating and Drinking Places</b>	<b>7</b>	<b>11.9%</b>
Computer			Restaurants/Luncheonettes	2	
<b>Miscellaneous Shopping Goods Stores</b>	<b>2</b>	<b>3.4%</b>	Refreshments/"Fast food" places	5	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)		
Stationery			<b>Neighborhood Services</b>	<b>18</b>	<b>30.5%</b>
Jewelry	1		Video rentals		
Hobby, toy, and games			Banks		
Camera and photographic supplies			Cleaners and tailors	3	
Gifts, novelties, and souvenirs			Hair and nail care	8	
Luggage and leather goods			Laundry		
Sewing, needlework, and piece goods			Travel agencies		
Religious articles			TV/Audio/Appliance repair		
Optical goods			Shoe repair		
Used merchandise			Medical offices	2	
Other misc. shopping goods	1		Other professional offices (check cashing, taxes)	3	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>0</b>	<b>0.0%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware			Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services (rehab, cabinetry)	2	
<b>AUTO-RELATED TRADE</b>	<b>0</b>	<b>0.0%</b>	Communications Center		
Motor vehicle dealers					
Auto supplies					
Gasoline and service stations					
Car rental					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>59</b>	<b>100.0%</b>	Convenience Goods	16	27.1%
Shopping Goods	11	18.6%	Eating and Drinking Places	7	11.9%
Blding Mtr'ls, Hardware, and Garden Supply	0	0.0%	Neighborhood Services	18	30.5%
Auto-Related	0	0.0%	Vacant Storefronts	7	11.9%
<b>Source:</b> AKRF, Inc., Summer 2004.					

*La Marqueta.* La Marqueta is an enclosed market located under the elevated tracks of the Metro North Rail Road on Park Avenue between East 111th and 116th Streets. The market was opened in 1936, and soon became the principal food market in East Harlem, carrying a wide range of products aimed principally at the local Hispanic population. After a period of decline, a portion of the market was reopened in 1993. Currently an open-air market and a 10,000-square-foot building have been renovated.

The enclosed space is occupied by approximately 8 vendors in spaces ranging from 90 to 250 square feet, selling goods such as fresh fish, cell phones, apparel, candy, craft supplies and fabric. A small farmers' market operates on weekends in the open-air portion of La Marqueta.

*East 125th Street (Between Second Avenue and Frederick Douglass Boulevard).* The East 125th Street corridor is the historic heart of Harlem. It is the location of such landmark businesses as the Apollo Theater, which is currently undergoing renovation, and continues to serve as a busy east-west transportation route, linking the FDR Drive and the Triborough Bridge with the Henry Hudson Parkway. Pedestrian traffic is also generally heavy along most of the corridor. Metro North Rail Road operates a commuter rail station at East 125th Street and Park Avenue.

Among the more notable commercial developments during the past several years is the Adam Clayton Powell, Jr., State Office Building, located between Malcolm X Boulevard and Adam Clayton Powell, Jr., Boulevard. More recently, retail activity has accelerated with the opening of national chains such as Blockbuster Video, Starbucks, The Body Shop, Dunkin Donuts, Duane Reade, Rite Aid, and Pathmark. The location of several national and local apparel chains, such as Lane Bryant, H&M, Payless Shoes, A Children's Place, and Jimmy Jazz, indicate that shopping goods retailing (and retailing, in general) is stronger toward the west of the corridor.

As shown in Table 3-28, there are a total of 249 storefronts along East 125th Street between Frederick Douglass Boulevard and Second Avenue. Shopping goods stores are predominant, making up 41 percent of the total inventory. Apparel and accessories make up a majority of shopping goods with 51 stores, or about 21 percent of the total inventory. Neighborhood services occupy about 20 percent of the total storefronts. Convenience goods stores represent 10 percent of the inventory. The current vacancy rate is 9 percent, with 22 vacant storefronts along the corridor.

*West 125th Street (Between Frederick Douglass Boulevard and Broadway).* The West 125th Street corridor changes course west of Frederick Douglass Boulevard, both in terms of its geographic direction and its retail character. As the road bends to the northwest, the retail changes to more neighborhood-oriented businesses. In place of shopping goods, neighborhood services dominate the mix, accounting for 32 of the 96 businesses in this segment of the corridor (see Table 3-29). Nearly half of these service establishments are hair and nail care salons. Almost 13 percent of the storefronts in this segment of West 125th Street sell convenience goods, including 1 supermarket, 7 grocery stores and bodegas, 1 drug store, a liquor store, and a florist. There are 14 eating and drinking places, representing about 15 percent of the storefronts, and 2 hardware stores, accounting for only 2 percent of the business inventory. Apparel and accessories stores dominate the shopping goods merchants, accounting for 10 of the 22 shopping goods retailers. The remaining 12 shopping goods stores are a mix of home furnishing stores, miscellaneous shopping goods stores, 3 electronics stores and one records/music store. The vacancy rate is high, with 13 vacant storefronts, which represent 14 percent of the total business inventory.

**Table 3-28**  
**East 125th Street Between Second Avenue and Frederick Douglass Boulevard**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>102</b>	<b>41.0%</b>	<b>CONVENIENCE GOODS</b>	<b>25</b>	<b>10.0%</b>
<b>General Merchandise Stores</b>	5	2.0%	<b>Food Stores</b>	15	
Department Stores, conventional national chains	1		Grocery stores, delis, bodegas	10	
Department Stores, discount national chains			Supermarkets	1	
Miscellaneous general merchandise stores	4		Meat and fish markets		
<b>Apparel and Accessory Stores</b>	51	20.5%	Retail bakeries	1	
Men's and boy's clothing	6		Fruit and vegetable markets		
Women's and girl's clothing	14		Candy, nut, and confectionary		
Family clothing	14		Miscellaneous/specialty foods (Health Fd.)	3	
Children's clothing	3		<b>Miscellaneous Convenience Goods</b>	10	4.0%
Shoes	8		Drug and proprietary stores	6	
Other apparel and accessories	6		Liquor stores	1	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	21	8.4%	Florists		
Furniture stores	4		Cigar stores and stands		
Floor covering stores	1		Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops	1	
Miscellaneous home furnishing stores	5		Photocopy stores	1	
Household appliance stores	2		Photo development	1	
Audio and video electronics (beepers, cell phones)	8		Other miscellaneous convenience goods		
Records and musical instruments	1		<b>Eating and Drinking Places</b>	<b>44</b>	<b>17.7%</b>
Computer			Restaurants/Luncheonettes	27	
<b>Miscellaneous Shopping Goods Stores</b>	25	10.0%	Refreshments/"Fast food" places	17	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books	1		Drinking places (alcohol)		
Stationery	2		<b>Neighborhood Services</b>	<b>49</b>	<b>19.7%</b>
Jewelry	5		Video rentals	1	
Hobby, toy, and games	2		Banks	10	
Camera and photographic supplies			Cleaners and tailors	1	
Gifts, novelties, and souvenirs	3		Hair and nail care	23	
Luggage and leather goods			Laundry		
Sewing, needlework, and piece goods	1		Travel agencies		
Religious articles			TV/Audio/Appliance repair		
Optical goods	2		Shoe repair		
Used merchandise			Medical offices	4	
Other misc. shopping goods	9		Other professional offices	5	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>2</b>	<b>0.8%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware	2		Health/Fitness club	1	
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Pawn service	1	
<b>AUTO-RELATED TRADE</b>	<b>5</b>	<b>2.0%</b>	Other neighborhood services (check cashing)	3	
Motor vehicle dealers					
Auto supplies					
Gasoline and service stations					
Car rental					
Car rental/Paid Parking					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>249</b>	<b>100.0%</b>	Convenience Goods	25	10.0%
Shopping Goods	102	41.0%	Eating and Drinking Places	44	17.7%
Blding Mtr'ls, Hardware, and Garden Supply	2	0.8%	Neighborhood Services	49	19.7%
Auto-Related	5	2.0%	Vacant Storefronts	22	8.8%
<b>Source:</b> AKRF, Inc., Summer 2004.					



Table 3-29

**West 125th Street Between Frederick Douglas Boulevard and Broadway**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>22</b>	<b>22.9%</b>	<b>CONVENIENCE GOODS</b>	<b>12</b>	<b>12.5%</b>
<b>General Merchandise Stores</b>	2	2.1%	<b>Food Stores</b>	8	8.3%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	7	
Department Stores, discount national chains			Supermarkets	1	
Miscellaneous general merchandise stores	2		Meat and fish markets		
<b>Apparel and Accessory Stores</b>	10	10.4%	Retail bakeries		
Men's and boy's clothing	1		Fruit and vegetable markets		
Women's and girl's clothing	2		Candy, nut, and confectionary		
Family clothing	2		Miscellaneous/specialty foods		
Children's clothing			<b>Miscellaneous Convenience Goods</b>	4	4.2%
Shoes	2		Drug and proprietary stores	1	
Other apparel and accessories (leather jackets, wigs)	3		Liquor stores	1	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	7	7.3%	Florists	1	
Furniture stores	1		Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands	1	
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores	2		Photocopy stores		
Household appliance stores			Photo development		
Audio and video electronics (beepers, cell phones)	3		Other miscellaneous convenience goods		
Records and musical instruments	1		<b>Eating and Drinking Places</b>	<b>14</b>	<b>14.6%</b>
Computer			Restaurants/Luncheonettes	1	
<b>Miscellaneous Shopping Goods Stores</b>	3	3.1%	Refreshments/"Fast food" places	12	
Sporting goods and bicycle	1		Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)	1	
Stationery			<b>Neighborhood Services</b>	<b>32</b>	<b>33.3%</b>
Jewelry			Video rentals		
Hobby, toy, and games			Banks	3	
Camera and photographic supplies			Cleaners and tailors	1	
Gifts, novelties, and souvenirs			Hair and nail care	14	
Luggage and leather goods			Laundry	2	
Sewing, needlework, and piece goods			Travel agencies		
Religious articles			TV/Audio/Appliance repair		
Optical goods			Shoe repair		
Used merchandise			Medical offices	3	
Other misc. shopping goods	2		Other professional offices	3	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>2</b>	<b>2.1%</b>	Home improvement services		
Paint, glass, and wallpaper	1		Funeral services		
Hardware	1		Health/Fitness club	1	
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Pharmacy	3	
<b>AUTO-RELATED TRADE</b>	<b>1</b>	<b>1.0%</b>	Pawn Shop	1	
Motor vehicle dealers			Paid Parking		
Auto supplies	1		Other neighborhood services	1	
Gasoline and service stations					
Car rental					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>96</b>	<b>100.0%</b>	Convenience Goods	12	12.5%
Shopping Goods	22	22.9%	Eating and Drinking Places	14	14.6%
Blding Mtr'ls, Hardware, and Garden Supply	2	2.1%	Neighborhood Services	32	33.3%
Auto-Related	1	1.0%	Vacant Storefronts	13	13.5%
<b>Source:</b> AKRF, Inc., Summer 2004.					

*Third Avenue (Between East 110th and 125th Streets).* As shown in Table 3-30, Third Avenue between East 110th and 125th Streets has a total of 143 storefronts, largely oriented toward shopping goods which make up 43 percent of the total storefronts. Apparel and accessories dominate the retail mix, with 19 stores accounting for about 13 percent of the total inventory. The remainder of the shopping goods stores offer a wide range of shopping goods, including 16 miscellaneous shopping goods stores which account for 11 percent of total storefronts, and 5 general merchandise stores which make up about 4 percent of the inventory. Furniture and home furnishings stores are very prominent in this area, with 22 furniture and home furnishings stores representing 15 percent of the total storefronts. Most of these are furniture stores (9), with only 1 floor-covering store, 1 drapery and curtain stores, 4 audio stores, 1 record and tape shop, and 4 miscellaneous home furnishing stores.

Convenience goods represent about 18 percent of storefronts, including 5 drug and proprietary stores and 3 supermarkets. Neighborhood services make up about 15 percent of storefronts, providing banking, hair and nail, cleaners and tailors, and medical services. A number of national chains such as Blockbuster Video, Rite Aid and McDonalds are represented along this strip. There are 9 vacant storefronts, accounting for 6 percent of the total inventory. There are a variety of neighborhood service establishments in 22 storefronts that account for about 15 percent of the businesses, as well as 16 eating and drinking places. The retail activity along the Third Avenue corridor is interrupted for a short distance between East 112th and 115th Streets by the Jefferson Houses to the east and J.W. Johnson Houses to the west.

*Malcolm X Boulevard (Between West 115th and 135th Streets).* Malcolm X Boulevard between West 115th and 135th Streets is a wide street with a mix of residential and retail uses. Some blocks, like the one between 120th and 121st Streets, are almost entirely residential. The vacancy rate along this strip is high, with 27 vacant storefronts, accounting for nearly 16 percent of the total inventory. Clusters of active storefronts are located at the intersection of 125th and 135th Streets. The intersection of 125th Street and Malcolm X Boulevard is the location of several well-known Harlem businesses, such as the Lenox Lounge and Sylvia's Restaurant. As shown in Table 3-31, there are a total of 174 storefronts along this 20-block segment of Malcolm X Boulevard. Neighborhood services dominate the mix, with 61 storefronts, or 35 percent of the inventory, including 31 hair and nail stores and 5 funeral parlors. Convenience goods are found in 35 stores, or about 20 percent of the inventory. Among these are 18 bodega-style groceries, 2 fish and meat markets, 2 liquor stores, and 3 supermarkets. There are 24 eating and drinking places, representing nearly 14 percent of the total inventory, including 12 refreshment or fast food places, 11 luncheonettes, and 1 drinking place, some of which have entertainment. Shopping goods stores account for 14 percent of total storefronts.

*Adam Clayton Powell, Jr. Boulevard (Between West 116th and 148th Streets).* Adam Clayton Powell, Jr. Boulevard between West 116th and 148th Streets is a long, wide strip with intermittent retail and commercial activity. Currently, the high number of vacancies gives the strip an underutilized look, except near the intersection with 134th Street where the storefronts are in generally better condition. Of the total 301 storefronts, 96 stores are vacant, about 32 percent of the total inventory (see Table 3-32). Among the occupied storefronts neighborhood services predominate, representing about 28 percent of the total inventory. Of the 80 neighborhood services establishments, 33 are hair and nail salons, 6 are laundromats, 3 are funeral parlors, 17 are professional services, and 10 are other neighborhood services. Convenience goods stores account for about 19 percent of all storefronts. In this 32-block stretch of Adam Clayton Powell, Jr. Boulevard there are 57 convenience goods stores, including 34

**Table 3-30**  
**Third Avenue Between East 110th and 125th Streets**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>62</b>	<b>43.4%</b>	<b>CONVENIENCE GOODS</b>	<b>26</b>	<b>18.2%</b>
<b>General Merchandise Stores</b>	5	3.5%	<b>Food Stores</b>	19	13.3%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	11	
Department Stores, discount national chains			Supermarkets	3	
Miscellaneous general merchandise stores	5		Meat and fish markets	3	
<b>Apparel and Accessory Stores</b>	19	13.3%	Retail bakeries	1	
Men's and boy's clothing	1		Fruit and vegetable markets	1	
Women's and girl's clothing	1		Candy, nut, and confectionary		
Family clothing	5		Miscellaneous/specialty foods		
Children's clothing	1		<b>Miscellaneous Convenience Goods</b>	7	4.9%
Shoes	6		Drug and proprietary stores	5	
Other apparel and accessories	5		Liquor stores	1	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	22	15.4%	Florists		
Furniture stores	9		Cigar stores and stands		
Floor covering stores	1		Newsdealers and newsstands		
Drapery, curtain, and upholstery stores	1		Pet shops		
Miscellaneous home furnishing stores	4		Photocopy stores		
Household appliance stores	1		Photo development	1	
Audio and video electronics (beepers, cell phones)	4		Other miscellaneous convenience goods		
Records and musical instruments	1		<b>Eating and Drinking Places</b>	<b>16</b>	<b>11.2%</b>
Computer	1		Restaurants/Luncheonettes	5	
<b>Miscellaneous Shopping Goods Stores</b>	16	11.2%	Refreshments/"Fast food" places	11	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books	1		Drinking places (alcohol)		
Stationery	1		<b>Neighborhood Services</b>	<b>22</b>	<b>15.4%</b>
Jewelry	2		Video rentals		
Hobby, toy, and games	4		Banks	1	
Camera and photographic supplies			Cleaners and tailors	3	
Gifts, novelties, and souvenirs	1		Hair and nail care	8	
Luggage and leather goods			Laundry	3	
Sewing, needlework, and piece goods			Travel agencies		
Religious articles	1		TV/Audio/Appliance repair		
Optical goods			Shoe repair		
Used merchandise			Medical offices	3	
Other misc. shopping goods	6		Other professional offices	2	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>3</b>	<b>2.1%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware	2		Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials	1		Other neighborhood services (body piercing electrical supply)	2	
<b>AUTO-RELATED TRADE</b>	<b>5</b>	<b>3.5%</b>			
Motor vehicle dealers					
Auto supplies	2				
Gasoline and service stations	1				
Paid Parking	2				
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>143</b>	<b>100.0%</b>	Convenience Goods	26	18.2%
Shopping Goods	62	43.4%	Eating and Drinking Places	16	11.2%
Blding Mtr'ls, Hardware, and Garden Supply	3	2.1%	Neighborhood Services	22	15.4%
Auto-Related	5	3.5%	Vacant Storefronts	9	6.3%
<b>Source:</b> AKRF, Inc., Summer 2004.					

**Table 3-31**

**Malcolm X Boulevard Between West 115th and 135th Streets**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>25</b>	<b>14.4%</b>	<b>CONVENIENCE GOODS</b>	<b>35</b>	<b>20.1%</b>
<b>General Merchandise Stores</b>	6	3.4%	<b>Food Stores</b>	24	38.8%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	18	
Department Stores, discount national chains			Supermarkets	3	
Miscellaneous general merchandise stores	6		Meat and fish markets	2	
<b>Apparel and Accessory Stores</b>	9	5.2%	Retail bakeries	1	
Men's and boy's clothing	1		Fruit and vegetable markets		
Women's and girl's clothing			Candy, nut, and confectionary		
Family clothing	4		Miscellaneous/specialty foods		
Children's clothing			<b>Miscellaneous Convenience Goods</b>	11	6.3%
Shoes	2		Drug and proprietary stores	3	
Other apparel and accessories	2		Liquor stores	2	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	2	1.1%	Florists	3	
Furniture stores			Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands	1	
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores	1		Photocopy stores	1	
Household appliance stores			Photo development	1	
Audio and video electronics (beepers, cell phones)			Other miscellaneous convenience goods		
Records and musical instruments	1		<b>Eating and Drinking Places</b>	<b>24</b>	<b>13.8%</b>
Computer			Restaurants/Luncheonettes	11	
<b>Miscellaneous Shopping Goods Stores</b>	8	4.6%	Refreshments/"Fast food" places	12	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books	1		Drinking places (alcohol)	1	
Stationery			<b>Neighborhood Services</b>	<b>61</b>	<b>35.1%</b>
Jewelry	1		Video rentals	2	
Hobby, toy, and games			Banks	3	
Camera and photographic supplies			Cleaners and tailors	4	
Gifts, novelties, and souvenirs	1		Hair and nail care	31	
Luggage and leather goods			Laundry	5	
Sewing, needlework, and piece goods			Travel agencies	1	
Religious articles			TV/Audio/Appliance repair		
Optical goods	2		Shoe repair	1	
Used merchandise			Medical offices		
Other misc. shopping goods (African mkt)	3		Other professional offices (architect, tax, check cashing)	7	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>2</b>	<b>1.1%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services	5	
Hardware	2		Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services (Harlem Children's zone, family counseling)	2	
<b>AUTO-RELATED TRADE</b>	<b>0</b>	<b>0.0%</b>	Communications Center		
Motor vehicle dealers					
Auto supplies					
Gasoline and service stations					
Car rental					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>174</b>	<b>100.0%</b>	Convenience Goods	35	20.1%
Shopping Goods	25	14.4%	Eating and Drinking Places	24	13.8%
Blding Mtr'ls, Hardware, and Garden Supply	2	1.1%	Neighborhood Services	61	35.1%
Auto-Related	0	0.0%	Vacant Storefronts	27	15.5%
<b>Source:</b> AKRF, Inc., Summer 2004.					

**Table 3-32**

**Adam Clayton Powell Jr. Boulevard Between West 116th and 148th Streets**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>29</b>	<b>9.6%</b>	<b>CONVENIENCE GOODS</b>	<b>57</b>	<b>18.9%</b>
<b>General Merchandise Stores</b>	8	2.7%	<b>Food Stores</b>	46	15.3%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	34	
Department Stores, discount national chains			Supermarkets	4	
Miscellaneous general merchandise stores	8		Meat and fish markets	4	
<b>Apparel and Accessory Stores</b>	12	4.0%	Retail bakeries	1	
Men's and boy's clothing	1		Fruit and vegetable markets	2	
Women's and girl's clothing	3		Candy, nut, and confectionary	1	
Family clothing			Miscellaneous/specialty foods		
Children's clothing			<b>Miscellaneous Convenience Goods</b>	11	3.7%
Shoes	1		Drug and proprietary stores	3	
Other apparel and accessories	7		Liquor stores	2	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	1	0.3%	Florists	2	
Furniture stores			Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands	1	
Drapery, curtain, and upholstery stores			Pet shops	1	
Miscellaneous home furnishing stores			Photocopy stores	2	
Household appliance stores			Photo development		
Audio and video electronics (beepers, cell phones)	1		Other miscellaneous convenience goods		
Records and musical instruments			<b>Eating and Drinking Places</b>	<b>28</b>	<b>9.3%</b>
Computer			Restaurants/Luncheonettes	13	
<b>Miscellaneous Shopping Goods Stores</b>	8	2.7%	Refreshments/"Fast food" places	12	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)	3	
Stationery			<b>Neighborhood Services</b>	<b>85</b>	<b>28.2%</b>
Jewelry	3		Video rentals		
Hobby, toy, and games			Banks	3	
Camera and photographic supplies			Cleaners and tailors	5	
Gifts, novelties, and souvenirs	1		Hair and nail care	33	
Luggage and leather goods			Laundry	6	
Sewing, needlework, and piece goods			Travel agencies	1	
Religious articles	1		TV/Audio/Appliance repair		
Optical goods	1		Shoe repair		
Used merchandise			Medical offices	2	
Other misc. shopping goods	2		Other professional offices (real estate broker, insurance)	17	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>6</b>	<b>2.0%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services	3	
Hardware	5		Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services (architect & planning, real estate, state offices, union, accountant, tax, driving school)	10	
Construction Company	1		Skin spa	1	
<b>AUTO-RELATED TRADE</b>	<b>0</b>	<b>0.0%</b>	Church	4	
Motor vehicle dealers			Communications Center		
Auto supplies					
Gasoline and service stations					
Car rental					
Pay Parking					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>301</b>	<b>100.0%</b>	Convenience Goods	57	18.9%
Shopping Goods	29	9.6%	Eating and Drinking Places	28	9.3%
Blding Mtr'ls, Hardware, and Garden Supply	6	2.0%	Neighborhood Services	80	28.2%
Auto-Related	0	0.0%	Vacant Storefronts	96	31.9%
<b>Source:</b> AKRF, Inc., Summer 2004.					

small corner grocers, 4 supermarkets, and 4 meat and fish markets. Restaurants and luncheonettes and fast food places account for almost 10 percent of the storefronts. Shopping goods occupy nearly 10 percent of the total inventory on this strip, with 29 store fronts. Although the retail vacancy rate is high, there are signs of revitalization along Adam Clayton Powell, Jr. Boulevard that may reduce retail vacancies in the future. Several abandoned buildings are already undergoing renovation, including a site on the northwest corner of Adam Clayton Powell, Jr. Boulevard and West 117th Street. Other buildings further north on the boulevard have already been rehabilitated for residential reuse with new ground floor retail storefronts, including sites on the west side of the boulevard between West 136th and 137th Streets (where there is a new H & R Block tax office), as well as on the eastside of the boulevard between West 145th and 146th Streets where buildings have been renovated under the New York City Department of Housing Preservation and Development's (NYCHPD) New Housing Marketplace program with new ground floor retail spaces that are currently being leased. In addition, there are several sites where abandoned buildings could potentially be redeveloped with residential units and ground floor retail spaces, including the eastside of Adam Clayton Powell, Jr. Boulevard between West 123rd and 124th Streets, and the east side of the boulevard between West 137th and 138th Streets.

*Frederick Douglass Boulevard (Between West 116th and 135th Streets).* Frederick Douglass Boulevard is a wide north-south avenue with commercial and residential uses. There are several segments of almost exclusively residential uses along this 19-block stretch of Frederick Douglass Boulevard, including St. Nicholas Houses between 127th and 131st Streets. The commercial mix and vacancy rate vary dramatically along the length of Frederick Douglass Boulevard. The area around 135th Street is in the best condition, including several new or newly renovated commercial spaces, as well as a number of neighborhood services, such as a branch of the Chase Manhattan Bank. Vacancies and deteriorated storefronts are more prevalent to the north and south of the redeveloped 135th Street hub. For instance, the stretch from 118th Street to 121st Street is mostly vacant.

As shown in Table 3-33, there are 155 storefronts on Frederick Douglass Boulevard between West 116th and 135th Streets. Convenience goods predominate, occupying 40 storefronts and accounting for about 26 percent of all storefronts. Of these, 22 are food stores, and of these 16 are small groceries, 3 are supermarkets, and 2 are meat and fish markets. There are 30 neighborhood services stores, the majority of these service establishments are hair and nail care salons, and other services such as laundromats, banks, shoe repair, and medical offices. Vacant storefronts outnumbered all other categories, with 45 storefronts, representing 29 percent of the total inventory on the strip.

The most recent changes to the retail inventory along Frederick Douglass Boulevard are in the vicinity of West 119th Street to West 121st Street. Harriet Tubman Gardens presents 5 new storefronts on the west side of the boulevard between West 120th and 121st Streets, including a wine store, cosmetics store, realtor and contractors office, dry cleaner, and a math and reading center. Just to the south of Harriet Tubman Gardens residential buildings are undergoing renovation with new storefronts, including a new office for Councilman Bill Perkins and his campaign for Manhattan Borough President. Several new retail storefronts are being leased in the ground floor of a renovated residential building on the east side of Frederick Douglass Boulevard between West 133rd and 134th Streets. Other sites where potential redevelopment could revitalize retail storefronts are located along the west side of Frederick Douglas Boulevard between West 128th and 129th Streets and on the east side of the boulevard between West 118th and 119th Streets.

Table 3-33

**Frederick Douglass Boulevard Between West 116th and 135th Streets**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>17</b>	<b>11.0%</b>	<b>CONVENIENCE GOODS</b>	<b>40</b>	<b>2.5%</b>
<b>General Merchandise Stores</b>	2	1.3%	<b>Food Stores</b>	22	14.2%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	16	
Department Stores, discount national chains			Supermarkets	3	
Miscellaneous general merchandise stores	2		Meat and fish markets	2	
<b>Apparel and Accessory Stores</b>	4	2.6%	Retail bakeries	1	
Men's and boy's clothing			Fruit and vegetable markets		
Women's and girl's clothing	1		Candy, nut, and confectionary		
Family clothing	2		Miscellaneous/specialty foods		
Children's clothing			<b>Miscellaneous Convenience Goods</b>	18	11.6%
Shoes			Drug and proprietary stores	15	
Other apparel and accessories	1		Liquor stores	1	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	5	3.2%	Florists	1	
Furniture stores			Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands	1	
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores	2		Photocopy stores		
Household appliance stores			Photo development		
Audio and video electronics (beepers, cell phones)	1		Other miscellaneous convenience goods		
Records and musical instruments	1		<b>Eating and Drinking Places</b>	<b>20</b>	<b>12.9%</b>
Computer	1		Restaurants/Luncheonettes	9	
<b>Miscellaneous Shopping Goods Stores</b>	6	3.9%	Refreshments/"Fast food" places	8	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books	1		Drinking places (alcohol)	3	
Stationery			<b>Neighborhood Services</b>	<b>30</b>	<b>19.4%</b>
Jewelry			Video rentals	1	
Hobby, toy, and games	2		Banks	1	
Camera and photographic supplies			Cleaners and tailors	5	
Gifts, novelties, and souvenirs			Hair and nail care	10	
Luggage and leather goods			Laundry	2	
Sewing, needlework, and piece goods			Travel agencies		
Religious articles			TV/Audio/Appliance repair		
Optical goods			Shoe repair	1	
Used merchandise			Medical offices	1	
Other misc. shopping goods	3		Other professional offices	3	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>0</b>	<b>0.0%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services	2	
Hardware			Health/Fitness club	1	
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services (check cashing, movie theater)	2	
<b>AUTO-RELATED TRADE</b>	<b>3</b>	<b>1.9%</b>	Internet Cafe	1	
Motor vehicle dealers			Communications Center		
Auto supplies	1				
Gasoline and service stations	1				
Car rental					
Paid Parking	1				
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>155</b>	<b>100.0%</b>	Convenience Goods	40	25.8%
Shopping Goods	17	11.0%	Eating and Drinking Places	20	12.9%
Blding Mtr'ls, Hardware, and Garden Supply	0	0.0%	Neighborhood Services	30	19.4%
Auto-Related	3	1.9%	Vacant Storefronts	45	29.0%
<b>Source:</b> AKRF, Inc., Summer 2004.					

*Broadway (Between West 114th and 152nd Streets)*. This segment of Broadway primarily serves local retail needs of Manhattanville residents. The commercial strip is characterized by smaller stores and busy pedestrian and vehicular traffic. Storefronts become more upscale south of Tiemann Place because of the influence of higher income customers and students associated with Columbia University.

Table 3-34 shows that there are a total of 359 storefronts on Broadway between West 114th and 152nd Streets. Of these, 95 provide neighborhood services, accounting for about 27 percent of all storefronts, including 38 hair and nail care establishments, and 13 other professional services, such as check cashing. Shopping goods and convenience goods also have a substantial presence on the strip, representing about 24 percent and 22 percent of total storefronts, respectively. These include national chains such as Foot Locker, Starbucks, and Cohen Optical, as well as local stores such as the El Mundo Department Store, a large store in the northern segment of this strip selling a wide assortment of home furnishings and apparel. Broadway has 36 vacant storefronts, accounting for about 10 percent of all commercial establishments.

*Broadway (Between West 155th and 166th Streets)*. Broadway between West 155th and 166th Streets is an active local retail strip primarily serving lower Washington Heights, as well as the demand for goods and services generated by Columbia Presbyterian Medical Center, which anchors the north end of this segment. In fact, the hospital interrupts retail activity along Broadway between West 164th and 168th Streets. South of the hospital, the variety of businesses is nearly equally distributed among shopping goods, convenience goods, and neighborhood services. The majority of stores are local businesses that cater to the largely Hispanic local community, although national chains are also represented. Most stores are small to medium size, and generally well kept. There is some second-story retail activity, and there is moderate to heavy pedestrian traffic.

Of the 198 storefronts on Broadway between West 155th and 166th Streets, 50 (or 27 percent) are shopping goods stores, including family clothing, shoes, women's and girl's clothing, and jewelry (see Table 3-35). There are 37 convenience goods stores, including 21 food stores, of which 14 are bodegas, and 3 are supermarkets. Neighborhood services, such as hair and nail care, travel agencies, and dry cleaners are found in 53 storefronts, representing about 28 percent of the commercial inventory. Two hardware stores are also located in this neighborhood strip. The vacancy rate along this portion of Broadway is relatively low comparable to the segments to the south. Between West 155th and 166th Streets, there were 18 vacant storefronts or nearly 10 percent of the total.

*Broadway (Between West 168th and 182nd Streets)*. There are 191 storefronts on the segment of Broadway between West 168th and 182nd Streets in the heart of Washington Heights. This active retail strip stretches from Columbia Presbyterian Hospital in the south, under the ramps to the George Washington Bridge and Port Authority Bus Station at West 178th Street, to West 181st Street in the north, which is itself a major retail strip. Buildings along this stretch of Broadway tend to be 5-story residential with ground floor commercial uses. The storefronts themselves tend to be small local businesses, with a few notable exceptions, primarily in the vicinity of West 181st Street and the George Washington Bridge where there is a Blockbuster Video, Rite Aid, and Apple Bank. Overall, business activity appears to be brisk and healthy, though there are signs of some marginal businesses between Columbia Presbyterian Hospital and West 177th Street. Pedestrian traffic is heaviest close to the hospital and north of West 177th Street.



**Table 3-34**  
**Broadway Between West 114th and 152nd Streets**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>86</b>	<b>24.0%</b>	<b>CONVENIENCE GOODS</b>	<b>80</b>	<b>22.3%</b>
<b>General Merchandise Stores</b>	8	2.2%	<b>Food Stores</b>	55	15.3%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	40	
Department Stores, discount national chains			Supermarkets	6	
Miscellaneous general merchandise stores	8		Meat and fish markets	3	
<b>Apparel and Accessory Stores</b>	28	7.8%	Retail bakeries	1	
Men's and boy's clothing	5		Fruit and vegetable markets	1	
Women's and girl's clothing	1		Candy, nut, and confectionary	2	
Family clothing	9		Miscellaneous/specialty foods	2	
Children's clothing			<b>Miscellaneous Convenience Goods</b>	25	7.0%
Shoes	8		Drug and proprietary stores	10	
Other apparel and accessories	5		Liquor stores	6	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	24	6.7%	Florists	1	
Furniture stores	3		Cigar stores and stands	1	
Floor covering stores	2		Newsdealers and newsstands	1	
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores	4		Photocopy stores	1	
Household appliance stores			Photo development	5	
Audio and video electronics (beepers, cell phones)	11		Other miscellaneous convenience goods		
Records and musical instruments	4		<b>Eating and Drinking Places</b>	<b>52</b>	<b>14.5%</b>
Computer			Restaurants/Luncheonettes	18	
<b>Miscellaneous Shopping Goods Stores</b>	26	7.2%	Refreshments/"Fast food" places	32	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books	1		Drinking places (alcohol)	2	
Stationery	2		<b>Neighborhood Services</b>	<b>95</b>	<b>26.5%</b>
Jewelry	9		Video rentals		
Hobby, toy, and games	2		Banks	5	
Camera and photographic supplies			Cleaners and tailors	12	
Gifts, novelties, and souvenirs	4		Hair and nail care	38	
Luggage and leather goods			Laundry	6	
Sewing, needlework, and piece goods	1		Travel agencies	6	
Religious articles			TV/Audio/Appliance repair		
Optical goods	2		Shoe repair		
Used merchandise			Medical offices	2	
Other misc. shopping goods	5		Other professional offices (insurance, taxes, money trans, check cashing)	13	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>5</b>	<b>1.4%</b>	Home improvement services	2	
Paint, glass, and wallpaper			Funeral services		
Hardware	5		Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services (driving school, passport)	2	
<b>AUTO-RELATED TRADE</b>	<b>5</b>	<b>1.4%</b>	Communications Center	9	
Motor vehicle dealers					
Auto supplies	2				
Gasoline and service stations	2				
Car rental	1				
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>359</b>	<b>100.0%</b>	Convenience Goods	80	22.3%
Shopping Goods	86	24.0%	Eating and Drinking Places	52	14.5%
Blding Mtr'ls, Hardware, and Garden Supply	5	1.4%	Neighborhood Services	95	26.5%
Auto-Related	5	1.4%	Vacant Storefronts	36	10.0%
<b>Source:</b> AKRF, Inc., Summer 2004.					

**Table 3-35**  
**Broadway Between West 155th and 166th Streets**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>50</b>	<b>26.5%</b>	<b>CONVENIENCE GOODS</b>	<b>37</b>	<b>19.6%</b>
<b>General Merchandise Stores</b>	6	3.2%	<b>Food Stores</b>	21	11.1%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	14	
Department Stores, discount national chains			Supermarkets	3	
Miscellaneous general merchandise stores	6		Meat and fish markets	4	
<b>Apparel and Accessory Stores</b>	21	11.1%	Retail bakeries		
Men's and boy's clothing			Fruit and vegetable markets		
Women's and girl's clothing	8		Candy, nut, and confectionary		
Family clothing	4		Miscellaneous/specialty foods		
Children's clothing	1		<b>Miscellaneous Convenience Goods</b>	16	8.5%
Shoes	7		Drug and proprietary stores	7	
Other apparel and accessories	1		Liquor stores	2	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	10	5.3%	Florists	2	
Furniture stores	2		Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores			Photocopy stores	1	
Household appliance stores			Photo development	3	
Audio and video electronics (beepers, cell phones)	6		Other miscellaneous convenience goods	1	
Records and musical instruments	2		<b>Eating and Drinking Places</b>	<b>28</b>	<b>14.8%</b>
Computer			Restaurants/Luncheonettes	13	
<b>Miscellaneous Shopping Goods Stores</b>	13	6.9%	Refreshments/"Fast food" places	14	
Sporting goods and bicycle			Other eating places—caterers, catering halls		
Books	2		Drinking places (alcohol)	1	
Stationery	1		<b>Neighborhood Services</b>	<b>53</b>	<b>28.0%</b>
Jewelry			Video rentals		
Hobby, toy, and games	1		Banks	3	
Camera and photographic supplies			Cleaners and tailors	4	
Gifts, novelties, and souvenirs	1		Hair and nail care	16	
Luggage and leather goods			Laundry	2	
Sewing, needlework, and piece goods			Travel agencies	7	
Religious articles	3		TV/Audio/Appliance repair		
Optical goods	1		Shoe repair		
Used merchandise			Medical offices	2	
Other misc. shopping goods (Pet Store)	4		Other professional offices (money orders, lawyer, real estate)	12	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>2</b>	<b>1.1%</b>	Home improvement services	1	
Paint, glass, and wallpaper			Funeral services		
Hardware	2		Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service	1	
Lumber and other building materials			Other neighborhood services		
<b>AUTO-RELATED TRADE</b>	<b>1</b>	<b>0.5%</b>	Communications Center	5	
Motor vehicle dealers					
Auto supplies					
Gasoline and service stations	1				
Car rental					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>189</b>	<b>100.0%</b>	Convenience Goods	37	19.6%
Shopping Goods	50	26.5%	Eating and Drinking Places	28	14.8%
Bldg Mtr'ls, Hardware, and Garden Supply	2	1.1%	Neighborhood Services	53	28.0%
Auto-Related	1	0.5%	Vacant Storefronts	18	9.5%
<b>Source:</b> AKRF, Inc., Summer 2004.					

This portion of Broadway has a balanced mix of shopping goods, convenience goods and neighborhood services. Shopping goods represent 24 percent of storefronts, including 19 apparel and accessory stores, 11 furniture and home furnishings stores, and 14 miscellaneous retail stores (see Table 3-36). Neighborhood services make up 28 percent of storefronts, providing hair and nail care, travel services, check cashing, international telephoning, and banking. Convenience goods are found in 42 stores, accounting for 22 percent of the inventory, including 15 small grocery stores and bodegas, 11 drug stores, 3 supermarkets, including a Gristedes, and 2 meat and fish markets. There are also 2 hardware stores and an auto-related business in this area. Only 13 storefronts were observed to be vacant, representing just 7 percent of total storefronts along this strip.

West 181st Street (Between Cabrini Boulevard and Amsterdam Avenue). West 181st Street between Cabrini Boulevard and Amsterdam Avenue is a neighborhood and community shopping strip with a total of 148 stores in a range of sizes from small to large. The 181st Street strip west of Broadway provides convenience goods and neighborhood services for local residents, such as small groceries, hair salons, and dry cleaners. East of Broadway the strip has a more regional shopping character, anchored at the intersection of St. Nicholas Avenue, with stores such as Duane Reade, Foot Locker, Banco Popular, Payless, and Chase Manhattan bank. Vehicular and pedestrian traffic is heavy in this area, as a result of its proximity to the approaches to the George Washington Bridge, and its importance as a shopping resource for upper Manhattan and the Bronx.

There are 44 shopping goods stores in this area, representing almost 30 percent of the 148 total storefronts (see Table 3-37). Shopping goods retailers include 29 apparel and accessory stores, 12 furniture, home furnishings, and equipment stores, and 14 miscellaneous shopping goods stores. There are 41 neighborhood service establishments that constitute about 28 percent of storefronts, with more than half providing hair and nail care, as well as dry cleaning and travel services. Convenience goods account for only 18 percent of the storefronts, including 9 smaller groceries and bodegas. In addition to shopping and convenience goods retailers, the strip has 3 hardware stores and 3 auto-related stores. There are 13 vacant storefronts along this strip, representing 9 percent of the total commercial inventory.

Dyckman Street Between 10th Avenue and Payson Avenue. Dyckman Street is an active commercial strip located in the northern tip of Manhattan. Concentrated between Broadway and Nagle Avenue, the retail businesses serve the Inwood community as well as residents of Washington Heights. As shown in Table 3-38, there are approximately 115 storefronts located within a six block stretch along Dyckman Street. Typical of a major shopping area, almost 43 percent (or 49 storefronts) of the total storefronts sell shopping goods such as apparel, furniture and home furnishings, miscellaneous shopping goods, hardware, and auto related goods. Apparel such as Jimmy Jazz and accessory businesses selling shoes and handbags make up the majority of the shopping goods stores, followed by electronics and cell phone stores.

Neighborhood services accounted for 19 percent (or 22 businesses) of the 115 storefronts along Dyckman Street. Most of the business establishments that dominate neighborhood services include hair and nail shops, medical offices, banks, and dry cleaners. Making up almost 17 percent of the total storefronts, convenience goods stores included grocery stores/delis, fish market, bakeries, and pharmacies. Eating and drinking establishments were the least represented retail category, making up only 12 percent of the total storefronts. Within this category, sit-down

**Table 3-36**  
**Broadway Between West 168th and 182nd Streets**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>46</b>	<b>24.1%</b>	<b>CONVENIENCE GOODS</b>	<b>42</b>	<b>22.0%</b>
<b>General Merchandise Stores</b>	<b>2</b>	<b>1.0%</b>	<b>Food Stores</b>	<b>22</b>	<b>11.5%</b>
Department Stores, conventional national chains			Grocery stores, delis, bodegas	15	
Department Stores, discount national chains			Supermarkets	3	
Miscellaneous general merchandise stores	2		Meat and fish markets	2	
<b>Apparel and Accessory Stores</b>	<b>19</b>	<b>9.9%</b>	Retail bakeries	1	
Men's and boy's clothing	2		Fruit and vegetable markets		
Women's and girl's clothing	9		Candy, nut, and confectionary	1	
Family clothing	4		Miscellaneous/specialty foods		
Children's clothing	2		<b>Miscellaneous Convenience Goods</b>	<b>20</b>	<b>10.5%</b>
Shoes	1		Drug and proprietary stores	11	
Other apparel and accessories	1		Liquor stores	2	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	<b>11</b>	<b>5.8%</b>	Florists	4	
Furniture stores	2		Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores	2		Photocopy stores		
Household appliance stores			Photo development	2	
Audio and video electronics (beepers, cell phones)	6		Other miscellaneous convenience goods	1	
Records and musical instruments	1		<b>Eating and Drinking Places</b>	<b>33</b>	<b>17.3%</b>
Computer			Restaurants/Luncheonettes	15	
<b>Miscellaneous Shopping Goods Stores</b>	<b>14</b>	<b>7.3%</b>	Refreshments/"Fast food" places	16	
Sporting goods and bicycle	1		Other eating places—caterers, catering halls	1	
Books			Drinking places (alcohol)	1	
Stationery	1		<b>Neighborhood Services</b>	<b>54</b>	<b>28.3%</b>
Jewelry	2		Video rentals	1	
Hobby, toy, and games	4		Banks	5	
Camera and photographic supplies			Cleaners and tailors	5	
Gifts, novelties, and souvenirs	2		Hair and nail care	17	
Luggage and leather goods			Laundry		
Sewing, needlework, and piece goods			Travel agencies	5	
Religious articles			TV/Audio/Appliance repair		
Optical goods	2		Shoe repair	1	
Used merchandise			Medical offices	5	
Other misc. shopping goods (pawn shop, perfume store)	2		Other professional offices (driving school, money transfer)	7	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>2</b>	<b>1.0%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware	2		Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services		
<b>AUTO-RELATED TRADE</b>	<b>1</b>	<b>0.5%</b>	Paid Parking	2	
Motor vehicle dealers	1		Communications Center	6	
Auto supplies					
Gasoline and service stations					
Car rental					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>191</b>	<b>100.0%</b>	Convenience Goods	42	22.0%
Shopping Goods	46	24.1%	Eating and Drinking Places	33	17.3%
Blding Mtr'ls, Hardware, and Garden Supply	2	1.0%	Neighborhood Services	54	28.3%
Auto-Related	1	0.5%	Vacant Storefronts	13	6.8%
<b>Source:</b> AKRF, Inc., Summer 2004.					

**Table 3-37**  
**West 181st Street Between Amsterdam Avenue and Cabrini Boulevard**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>44</b>	<b>29.7%</b>	<b>CONVENIENCE GOODS</b>	<b>27</b>	<b>18.2%</b>
<b>General Merchandise Stores</b>	5	3.4%	<b>Food Stores</b>	14	9.5%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	9	
Department Stores, discount national chains			Supermarkets	1	
Miscellaneous general merchandise stores	5		Meat and fish markets	1	
<b>Apparel and Accessory Stores</b>	29	19.6%	Retail bakeries	2	
Men's and boy's clothing	7		Fruit and vegetable markets		
Women's and girl's clothing	6		Candy, nut, and confectionary	1	
Family clothing	1		Miscellaneous/specialty foods		
Children's clothing	1		<b>Miscellaneous Convenience Goods</b>	13	8.8%
Shoes	8		Drug and proprietary stores	4	
Other apparel and accessories	6		Liquor stores	2	
<b>Furniture, Home Furnishings, and Equipment Stores</b>	12	8.1%	Florists		
Furniture stores	4		Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops	1	
Miscellaneous home furnishing stores			Photocopy stores	1	
Household appliance stores			Photo development	1	
Audio and video electronics (beepers, cell phones)	8		Other miscellaneous convenience goods	4	
Records and musical instruments			<b>Eating and Drinking Places</b>	<b>17</b>	<b>11.5%</b>
Computer			Restaurants/Luncheonettes	8	
<b>Miscellaneous Shopping Goods Stores</b>	14	9.5%	Refreshments/"Fast food" places	9	
Sporting goods and bicycle	1		Other eating places—caterers, catering halls		
Books			Drinking places (alcohol)		
Stationery	1		<b>Neighborhood Services</b>	<b>41</b>	<b>27.7%</b>
Jewelry	2		Video rentals		
Hobby, toy, and games			Banks	3	
Camera and photographic supplies			Cleaners and tailors	6	
Gifts, novelties, and souvenirs	1		Hair and nail care	14	
Luggage and leather goods			Laundry	1	
Sewing, needlework, and piece goods	1		Travel agencies	4	
Religious articles	1		TV/Audio/Appliance repair		
Optical goods	4		Shoe repair	1	
Used merchandise	1		Medical offices	2	
Other misc. shopping goods	2		Other professional offices (real estate broker, insurance)	3	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>3</b>	<b>2.0%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware	3		Health/Fitness club	1	
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Other neighborhood services (check cashing, movie theater, learning center, rent-a-center)	6	
<b>AUTO-RELATED TRADE</b>	<b>3</b>	<b>2.0%</b>	Church		
Motor vehicle dealers			Communications Center	3	
Auto supplies					
Gasoline and service stations	1				
Car rental	1				
Pay Parking	1				
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>148</b>	<b>100.0%</b>	Convenience Goods	27	18.2%
Shopping Goods	44	29.7%	Eating and Drinking Places	17	11.5%
Blding Mtr'ls, Hardware, and Garden Supply	3	2.0%	Neighborhood Services	41	27.7%
Auto-Related	3	2.0%	Vacant Storefronts	13	8.8%
<b>Source:</b> AKRF, Inc., Summer 2004.					

**Table 3-38**

**Dyckman Street Between Tenth Avenue and Payson Avenue**

Category	Establishments		Category	Establishments	
	No.	Percent		No.	Percent
<b>SHOPPING GOODS</b>	<b>49</b>	<b>42.6%</b>	<b>CONVENIENCE GOODS</b>	<b>19</b>	<b>16.5%</b>
<b>General Merchandise Stores</b>	0	0.0%	<b>Food Stores</b>	12	10.4%
Department Stores, conventional national chains			Grocery stores, delis, bodegas	9	
Department Stores, discount national chains			Supermarkets		
Miscellaneous general merchandise stores			Meat and fish markets	1	
<b>Apparel and Accessory Stores</b>	27	23.5%	Retail bakeries	2	
Men's and boy's clothing	4		Fruit and vegetable markets		
Women's and girl's clothing	5		Candy, nut, and confectionary		
Family clothing	6		Miscellaneous/specialty foods		
Children's clothing	2		<b>Miscellaneous Convenience Goods</b>	7	6.1%
Shoes	7		Drug and proprietary stores	4	
Other apparel and accessories (Bridal Shop)	3		Liquor stores		
<b>Furniture, Home Furnishings, and Equipment Stores</b>	11	9.6%	Florists		
Furniture stores	1		Cigar stores and stands		
Floor covering stores			Newsdealers and newsstands		
Drapery, curtain, and upholstery stores			Pet shops		
Miscellaneous home furnishing stores	1		Photocopy stores	2	
Household appliance stores	1		Photo development		
Audio and video electronics (beepers, cell phones)	7		Other miscellaneous convenience goods	1	
Records and musical instruments	1		<b>Eating and Drinking Places</b>	<b>14</b>	<b>12.2%</b>
Computer			Restaurants/Luncheonettes	7	
<b>Miscellaneous Shopping Goods Stores</b>	11	9.6%	Refreshments/"Fast food" places	6	
Sporting goods and bicycle	1		Other eating places—caterers, catering halls		
Books	1		Drinking places (alcohol)	1	
Stationery			<b>Neighborhood Services</b>	<b>2</b>	<b>19.1%</b>
Jewelry	3		Video rentals	1	
Hobby, toy, and games	2		Banks	3	
Camera and photographic supplies			Cleaners and tailors	3	
Gifts, novelties, and souvenirs			Hair and nail care	5	
Luggage and leather goods			Laundry	1	
Sewing, needlework, and piece goods			Travel agencies	1	
Religious articles			TV/Audio/Appliance repair		
Optical goods	1		Shoe repair		
Used merchandise			Medical offices	6	
Other misc. shopping goods	3		Other professional offices (taxes)	2	
<b>BLDING MTR'LS, HARDWARE &amp; GARDEN SUPPLY</b>	<b>1</b>	<b>0.9%</b>	Home improvement services		
Paint, glass, and wallpaper			Funeral services		
Hardware	1		Health/Fitness club		
Retail nurseries, lawn, and garden supply stores			Car service		
Lumber and other building materials			Money Transfer		
<b>AUTO-RELATED TRADE</b>	<b>3</b>	<b>2.6%</b>	Communications Center	2	
Motor vehicle dealers			Other neighborhood services (Club, check cashing)	2	
Auto supplies	1				
Gasoline and service stations	2				
Car rental					
<b>STOREFRONTS SUMMARY</b>					
<b>Total Storefronts</b>	<b>115</b>	<b>100.0%</b>	Convenience Goods	19	16.5%
Shopping Goods	49	42.6%	Eating and Drinking Places	14	12.2%
Blding Mtr'ls, Hardware, and Garden Supply	1	0.9%	Neighborhood Services	22	19.1%
Auto-Related	0	0.0%	Vacant Storefronts	10	8.7%
<b>Source:</b> AKRF, Inc., Summer 2005.					

restaurants and fast food businesses such as McDonald's and Subway make up the majority. Although Dyckman Street is an active strip with well established businesses, almost 9 percent (or 10 businesses) of the storefronts were vacant.

### ***FUTURE WITHOUT THE PROPOSED ACTIONS***

Conditions on the project site and within the study area in the future without the proposed actions would be as discussed above under "Direct Business Displacement."

#### ***Trade Area Market Condition and Capture Rates***

The primary changes that may affect retail market conditions in the trade area in the future without the proposed actions are population changes, which could increase the household expenditure potential within the trade area and generate additional demand for retail goods; and new retail projects, which would expand the retail inventory in the trade area. Changes in household expenditures, retail sales, and capture rates for the Primary Trade Area and 3-Mile Trade Area are described below.

#### ***Primary Trade Area***

Based on 2010 forecasts generated by the New York Metropolitan Transportation Council in 2004, the population of the Primary Trade Area is expected to grow to approximately 3.0 million people by 2009. Assuming that the average household size remains at 2.9 persons per household in the Bronx and 2.1 persons per household in Manhattan, the trade area would contain approximately 376,662 households in 2009. According to expenditure data from Claritas, households located in the Bronx spend approximately \$20,512 per household per year on retail goods and households located in the Manhattan portion of the trade area spend roughly \$20,042 per household per year on retail goods. Assuming that Primary Trade Area households continue spending in those amounts, expenditure potential for retail goods would be \$13.6 billion in 2009.

At the same time, retail sales in the Primary Trade Area would also increase, as new retail projects known to be planned for the trade area are completed. Table 3-39 shows the capture rate in 2009 with the addition of several retail projects (and mixed-use projects that contain a retail component): the East River Plaza development (475,000 square feet of retail space); the Yankee Stadium project (19,000 square feet of retail space); a 48,500-square-foot retail project planned for Washington Avenue and East 164th Street; a proposed 130,000-square-foot BJ's Wholesale Club at 900 Brush Avenue, and a 31,000-square-foot retail development planned for 3rd Avenue between 161st and 163rd Streets. Based on sales estimates obtained from the *East River Plaza Final Environmental Impact Statement* (FEIS) and from the Urban Land Institute's 2004 *Dollars and Cents of Shopping Centers*, annual sales to household consumers at these developments would total approximately \$640 million. Assuming that 80 percent of those sales (\$512 million) would be captured within the Primary Trade Area, these projects would collectively increase total trade area retail sales for the categories analyzed from \$6.3 billion under current conditions to \$6.8 billion in 2009.

**Table 3-39**

**Estimated Capture Rates in the Future Without the Proposed Action by 2009**  
**Primary Trade Area**

Retail Category	Estimated Expenditure (Millions)	Estimated Sales (Millions)	Capture Rate
Shopping Goods	\$ 4,574	\$ 2,197	48.0%
<i>Department Stores</i>	\$ 1,442	\$ 385	26.7 %
Convenience Goods	\$ 6,199	\$ 3,423	55.2%
<i>Food Stores</i>	\$ 3,596	\$ 1,662	46.2%
Eating & Drinking	\$ 2,778	\$ 967	34.8%
Building Materials	\$ 387	\$ 205	52.9%
Total	\$ 13,938	\$ 6,792	48.7%
<p><b>Notes:</b> All dollar values are presented in 2005 dollars. Projects included in the future without the proposed action are: the East River Plaza development (475,000 square feet of retail space); the Yankee Stadium project (19,000 square feet of retail space); a 48,500-square-foot retail project planned for Washington Avenue and East 164th Street; a proposed 130,000-square-foot BJ's Wholesale Club at 900 Brush Avenue, and a 31,000-square-foot retail development planned for 3rd Avenue between 161st and 163rd Streets. Projected sales from the planned Home Depot at East River Plaza were distributed between shopping goods (25 percent of sales) and building materials goods (75 percent of sales). Approximately 35 percent of the building materials portion of Home Depot sales were deducted to account for contractor (non-household) sales.</p> <p><b>Sources:</b> 2002 Census of Retail Trade, Claritas, Inc. 2004 Retail SIC Summary data and 2004 Consumer Spending Patterns data; Urban Land Institute's 2004 <i>Dollars and Cents of Shopping Centers</i>; 2010 population projections issued by NYMTC in 2004; AKRF, Inc.</p>			

Table 3-39 summarizes the retail expenditure potential, sales, and capture rates for the Primary Trade Area in 2009 without the Proposed Project. The capture rates are based on the assumption that 80 percent of the sales from new retail projects would come from households living in the Primary Trade Area. In addition, it was assumed that 65 percent of the retail sales within the Primary Trade Area from the Home Depot planned for the East River Plaza retail development would come from households, with the remaining 35 percent discounted to reflect sales from contractors. Overall, with annual sales of approximately \$6.8 billion and annual household expenditure potential of \$13.9 billion, the capture rate for the Primary Trade Area would be approximately 48.7 percent by 2009—approximately 3 percentage points higher than it was in 2004. Convenience goods would continue to have the highest capture rate—55.2 percent, compared to 52.9 percent for building materials goods, 48.0 percent for shopping goods and 34.8 percent for eating and drinking places. Within the convenience goods category, the capture rate for food stores would increase by just under 4 percentage points, from 42.3 percent in 2005 to 46.2 percent in 2009. Within the shopping goods category, the department store capture rate would decrease slightly (from 27.0 percent to 26.7 percent) as population grows and no new department stores are added to the trade area.

### 3-Mile Trade Area

Based on 2010 forecasts generated by the New York Metropolitan Transportation Council in 2004 and the current average household sizes for Manhattan and the Bronx, the 3-Mile Trade Area would contain approximately 380,760 households in 2009. If households located in the Bronx portion of the trade area spend roughly \$18,633 per household per year on retail goods and households located in the Manhattan portion of the trade area continue to spend roughly \$20,436 per household per year on retail goods (Claritas, 2004), the household expenditure



potential for those goods would be \$7.3 billion in 2009. This represents a 3 percent increase over household expenditures in 2005.

Retail projects known to be planned for the 3-Mile Trade Area include East River Plaza and the Yankee Stadium development described above. Conservatively assuming that 80 percent of all sales would be derived from households within the 3-Mile Trade Area (as opposed to the larger Primary Trade Area), sales from those developments within the Primary Trade Area are estimated to be \$155 million, which would increase sales in the 3-Mile Trade Area from approximately \$4.2 billion in 2005 to \$4.3 billion in 2009.

Table 3-40 summarizes the retail expenditure potential, sales, and capture rates for the 3-Mile Trade Area in 2009 without the proposed action. Even with the conservative assumption that 80 percent of the new sales would come from households living in the 3-Mile Trade Area, the overall retail capture rate would increase only slightly compared to the existing condition—from 58.1 percent in 2005 to 58.4 percent in 2009. The only increase would be in shopping goods sales, which would go from capturing roughly 63.5 percent of expenditure potential in 2005 to 65.5 percent in 2009.

**Table 3-40**  
**Estimated Capture Rates in the Future Without the Proposed Action by 2009**  
**3-Mile Trade Area**

<b>Retail Category</b>	<b>Estimated Expenditure (Millions)</b>	<b>Estimated Sales (Millions)</b>	<b>Capture Rate</b>
Shopping Goods	\$ 2,387	\$ 1,563	65.5%
<i>Department Stores</i>	\$ 769	\$ 264	34.3%
Convenience Goods	\$ 3,447.4	\$ 2,017	58.5%
<i>Food Stores</i>	\$ 2,043.0	\$ 1,120	54.8%
Eating & Drinking	\$ 1,466.9	\$ 682	46.5%
Total	\$ 7,301	\$ 4,261	58.4%
<b>Note:</b> All dollar values are presented in 2005 dollars. 25 percent of projected sales from the planned Home Depot at East River Plaza were distributed to shopping goods.			
<b>Sources:</b> 2002 Census of Retail Trade, Claritas, Inc. 2004 Retail SIC Summary data and 2004 Consumer Spending Patterns data; Urban Land Institute's 2004 <i>Dollars and Cents of Shopping Centers</i> ; 2010 population projections issued by NYMTC in 2004; AKRF, Inc.			

As noted above in Existing Conditions, a capture rate was not calculated for the building materials category in the 3-Mile Trade Area because these stores tend to have a regional draw far beyond the bounds of the 3-Mile Trade Area. Existing building materials stores deal primarily with professional builders and maintenance contractors, rather than do-it-yourself homeowners and condominium owners (which is a very limited market within the 3-Mile Trade Area). In addition, none of the existing stores serve as anchors to major shopping streets.

#### **PROBABLE IMPACTS OF THE PROPOSED ACTIONS**

The issue of competition as described in the *CEQR Technical Manual* is whether a project could affect neighborhood character by affecting the viability of neighborhood shopping areas through competition, thereby becoming an environmental concern. If an impact on any individual retailer or group of retailers is found to be great enough to undermine the viability of existing neighborhood shopping strips or shopping centers, and that effect may, in turn, alter neighborhood character, then the impact would be considered to be adverse.

As described in Chapter 1, “Project Description,” the Proposed Project would include two 1-story retail buildings totaling approximately 27,880 gsf—referred to as Retail Buildings E.1 and E.2; a four-story, approximately 542,218-gsf building with 434,272 gsf of retail (Retail Building B/F); a six-level parking garage with 20,739 gsf of retail on Exterior Street (Retail Building C) and 8,238 gsf of retail on River Avenue (Retail Building D); and a 3-story, approximately 466,582-gsf retail building (Retail Building A). In total, the project would comprise 957,711 gsf of new retail use on the site (see Table 3-41 below).

**Table 3-41**  
**Retail Component of Proposed Project**

<b>Building</b>	<b>Retail Square Footage</b>
Retail Building A	<u>466,582</u> gsf
Retail Building B/F	<u>434,272</u> gsf
Retail Building C	<u>20,739</u> gsf
Retail Building D	<u>8,238</u> gsf
Retail Building E.1	<u>20,304</u> gsf
Retail Building E.2	<u>7,576</u> gsf
<b>Total</b>	<b><u>957,711</u> gsf</b>
<b>Source:</b> BTM Development Partners.	

Total retail sales resulting from the proposed Gateway Center at Bronx Terminal Market are projected to be approximately \$430.2 million annually (see Table 3-42), generated by 576,137 gross square feet of large-scale retail space, 324,717 gross square feet of medium-scale retail stores, and 56,857 gross square feet of restaurants and small retailers. The total square footage was divided and categorized into retail space selling shopping goods, convenience goods, building materials, and eating and drinking establishments based on information provided by the project sponsor. For purposes of analysis, it is assumed that the Proposed Project may include: one large-scale building materials/home improvement store approximately 130,000 square feet in size; one large-scale wholesale club approximately 137,000 square feet in size; one large-scale department store approximately 115,793 square feet in size; and one supermarket approximately 65,888 square feet in size. The estimated size and estimated sales allocated to convenience goods stores (shown in the table below) include the potential supermarket and the portion of the wholesale club that would be devoted to food and other convenience items. For example, of the \$124 million in estimated convenience goods sales (including sales from outside the Primary Trade Area), approximately \$56.6 million would be generated by the potential supermarket and \$67.1 million by the potential wholesale club. It should be noted that although sales per square foot figures are typically lower for wholesale clubs than for supermarkets, this analysis conservatively assumes that the potential wholesale club would perform as well on a sales per square foot basis as the potential supermarket. The analysis further assumes that the potential supermarket, food component of the wholesale food store, and department store would perform as well as the top two percent of comparable stores in the United States (with the wholesale club and supermarket generating sales of \$859 per square foot and the department store generating sales of \$416 per square foot).

**Table 3-42**  
**Estimated Retail Sales for Proposed Project**

Gateway Center at Bronx Terminal Market	Square Feet	Sales Per Square Foot	Total Estimated Household Sales (Millions)	Sales attributed to 3-Mile trade area (Millions) <sup>5</sup>	Sales attributed to Primary Trade Area (Millions)
Shopping Goods	687,155	\$ 400	\$ 274.9	\$ 112.9	\$ 219.9
Department Stores	115,793	\$ 416	\$ 48.1	\$ 20.2	\$ 38.5
Convenience Goods (food sales from wholesale club and supermarket) <sup>1</sup>	143,978	\$ 859	\$ 123.7	\$ 54.2	\$ 99.0
Eating & Drinking <sup>2</sup>	28,429	\$ 347	\$ 9.9	\$ 4.1	\$ 7.9
Building Materials (portion of home improvement store) <sup>3</sup>	98,150	\$ 475	\$ 32.6	\$ 10.4	\$ 26.1
Total <sup>4</sup>	957,711		\$ 430.2	\$ 192.9	\$ 344.1
<b>Notes:</b> 1 The project is assumed to include a 65,888-square-foot supermarket and a 137,000-square-foot wholesale club. Based on wholesale club sales data from selected 2003 annual reports, 57% of the wholesale club sales are assumed to be from groceries. 2 Half of the 56,857 square feet of small-scale retail/restaurant space is assumed to be restaurants. 3 25 percent of the home improvement store square footage was allocated to the shopping goods category, as this is the estimated amount of shopping goods merchandise typically found in home improvement stores. Of the remaining building materials sales, 35 percent were attributed to contractor sales, and thus were not included in household sales. 4 Summing the square footage for the five categories will yield a total that is higher than the total amount of development planned. This is because the department stores category is a sub-set of the shopping goods category. Sales from the department store were counted in both the department store category and the shopping goods category. 5 The percent of total project sales applied to the 3-Mile Trade Area (for the purpose of calculating capture rates) was determined based on the current ratio, for each retail category, of 3-Mile Trade Area to Primary Trade Area expenditure potential. <b>Sources:</b> Project plan for Gateway Center; Urban Land Institute, <i>Dollars &amp; Cents of Shopping Centers, 2004</i> ; proprietary sales data from department stores and shopping centers in the New York Metropolitan Area, AKRF, Inc.					

Sales at the building materials store that would stem from retail goods such as carpets, lamps and furniture (as opposed to non-retail goods such as lumber and plumbing supplies) were counted in the shopping goods sales figure, and all sales at the department store were counted in the department store sales figure as well as the shopping goods sales figure. This means that those sales are essentially counted twice—once under the department store category and again under the shopping goods category. It should be noted that the totals presented in Table 3-42 are actual totals, which factor out the conservative double-counting.

#### *Primary Trade Area Capture Rates*

As shown in Table 3-43, the introduction of the Gateway Center at Bronx Terminal Market would increase the overall retail capture rate within the Primary Trade Area from 48.7 percent in

**Table 3-43**

**Comparison of Estimated Retail Capture Rates in Primary Trade Area:  
Existing Conditions, Future Without the Proposed Project, and  
Future With the Proposed Project**

	Retail Sales in Primary Trade Area (Millions)	Retail Expenditures by Primary Trade Area Households (Millions)	Primary Trade Area Capture Rate
<b>Existing Conditions</b>			
Shopping Goods	\$2,104	\$4,518	46.6%
<i>Department Stores</i>	\$ 385	\$1,424	27.0 %
Convenience Goods	\$ 3,024	\$6,123	49.4%
<i>Food Stores</i>	\$ 1,503	\$3,551	42.3%
Eating & Drinking	\$ 966	\$2,743	35.2%
Building Materials	\$ 186	\$ 382	48.7%
Total	\$ 6,280	\$13,766	45.6%
<b>2009 Without the Proposed Project</b>			
Shopping Goods	\$2,197	\$4,574	48.0%
<i>Department Stores</i>	\$ 385	\$ 1,441	26.7%
Convenience Goods	\$3,423	\$6,199	55.2%
<i>Food Stores</i>	\$1,661	\$3,596	46.2%
Eating & Drinking	\$967	\$2,778	34.8%
Building Materials	\$ 205	\$ 387	52.9%
Total	\$6,792	\$13,938	48.7%
<b>2009 With the Proposed Project</b>			
Shopping Goods	<u>\$ 2,417</u>	\$4,574	<u>52.8%</u>
<i>Department Stores</i>	\$ 423	\$ 1,442	29.4%
Convenience Goods	<u>\$ 3,522</u>	\$6,199	56.8%
<i>Food Stores</i>	<u>\$ 1,761</u>	\$3,596	<u>49.0%</u>
Eating & Drinking	<u>\$ 974</u>	\$2,778	<u>35.1%</u>
Building Materials	\$ 231	\$ 387	59.6%
Total	<u>\$ 6,914</u>	<u>\$13,551</u>	<u>51.0%</u>
<b>Note:</b> All dollar values are presented in 2005 dollars. <b>Sources:</b> 2002 Census of Retail Trade, Claritas, Inc. 2004 Retail SIC Summary data and 2004 Consumer Spending Patterns data, AKRF, Inc.			

the future without the proposed actions to approximately 51.0 percent in the future with the Proposed Project. (This calculation is based on the assumption that 80 percent of the household sales from the Proposed Project would come from households living in the Primary Trade Area.) The 51.0 percent capture rate indicates that even with the addition of 957,700 gross square feet of retail shopping uses on the project site, a substantial percentage of the shopping goods buying power (49.0 percent) would continue to flow out of the Primary Trade Area.

Shopping goods stores would experience the greatest change in capture rate, with the capture rate increasing from approximately 48 percent in the future without the Proposed Project to nearly 53 percent in the future with the Proposed Project. The convenience goods, food store,

and eating and drinking capture rates would all increase by less than three percentage points compared to the future without the Proposed Project. Projected capture rates for all types of retail goods would continue to fall below the 70 to 80 percent rate that is typical for Primary Trade Areas, indicating that the Proposed Project would not over-saturate the retail market in the Primary Trade Area.

Given that the proposed actions would not substantially raise the capture rate within the Primary Trade Area, the Proposed Project would not have the potential to adversely affect competitive stores throughout the trade area.

In the future without the proposed actions, growth in population and associated expenditure potential would outpace growth in retail sales, and retail expenditures would continue to leak out of the borough and New York City as a whole. The Proposed Project would divert a portion of trade area residents' retail sales dollars that might otherwise be spent outside the borough, and would enhance the retail selection available to residents. In addition, in recapturing sales outflows, the proposed actions would provide sales tax revenues to New York City and employment opportunities to the Bronx that might otherwise have been realized in another borough or outside New York City.

### *3-Mile Trade Area Capture Rates*

Capture rates for the three major categories of shopping goods were calculated under the assumption that only a proportion of sales from the Proposed Project would be generated by households living in the 3-Mile Trade Area. These proportions were based on current expenditure data (Claritas, 2004) for the Primary Trade Area and 3-Mile Trade Area. According to those data, 51.3 percent of Primary Trade Area shopping goods expenditure potential, 54.7 percent of Primary Trade Area convenience goods expenditure potential, and 52.0 percent of Primary Trade Area eating and drinking expenditure potential are located in the 3-Mile Trade Area. Sales projected for the retail uses included in the Proposed Project were allocated to the 3-Mile Trade Area in these same proportions.

As shown in Table 3-44, the Proposed Project would increase the overall retail capture rate within the 3-Mile Trade Area from 58.4 percent in the future without the proposed actions to 60.7 percent. The 60.7 percent capture rate would still fall below the 70 to 80 percent rate that is typical for trade areas that are satisfying local retail demand.

Shopping goods stores would experience the greatest increase in capture rate, with the capture rate changing from approximately 65.5 percent in the future without the Proposed Project to 70.2 percent in the future with the Proposed Project. The department store capture rate would increase from 34.3 percent in the future without the Proposed Project to 37.0 percent in the future with the Proposed Project.

The convenience goods capture rate would increase by 1.6 percentage points (from 58.5 percent to 60.1 percent), and the capture rate for the food store subset of the convenience goods category would increase by 2.7 percentage points (from 54.8 percent to 57.5 percent). The eating and drinking capture rate would increase by less than half of a percentage point (from 46.5 percent to 46.7 percent). Thus, in the future with the Proposed Project, the capture rates for all three major categories of retail goods would fall below the 70-80 percent rate that is typical for areas that are satisfying the local demand for retail goods.

**Table 3-44**

**Comparison of Estimated Retail Capture Rates in 3-Mile Trade Area:  
Existing Conditions, Future Without the Proposed Project,  
and Future With the Proposed Project**

	Retail Sales in 3-Mile Area (Millions)	Retail Expenditures by 3-Mile Area Households (Millions)	3-Mile Area Capture Rate
<b>Existing Conditions</b>			
Shopping Goods	\$1,473	\$2,319	63.5%
<i>Department Stores</i>	<i>\$264</i>	<i>\$747</i>	<i>35.3%</i>
Convenience Goods	\$1,971	\$3,350	58.8%
<i>Food Stores</i>	<i>\$1,093</i>	<i>\$1,986</i>	<i>55.0%</i>
Eating & Drinking	\$681	\$1,425	47.8%
Total	\$4,125	\$7,095	58.1%
<b>2009 Without the Proposed Project</b>			
Shopping Goods	\$1,563	\$2,387	65.5%
<i>Department Stores</i>	<i>\$264</i>	<i>\$769</i>	<i>34.3%</i>
Convenience Goods	\$2,017	\$3,447	58.5%
<i>Food Stores</i>	<i>\$1,120</i>	<i>\$2,043</i>	<i>54.8%</i>
Eating & Drinking	\$682	\$1,467	46.5%
Total	\$4,261	\$7,301	58.4%
<b>2009 With the Proposed Project</b>			
Shopping Goods	<u>\$1,676</u>	\$2,387	<u>70.2%</u>
<i>Department Stores</i>	<i>\$284</i>	<i>\$769</i>	<i>37.0%</i>
Convenience Goods	<u>\$2,071</u>	\$3,447	<u>60.1%</u>
<i>Food Stores</i>	<u>\$1,174</u>	<i>\$2,043</i>	<u>57.5%</u>
Eating & Drinking	<u>\$685</u>	\$1,467	46.7%
Total	<u>\$4,432</u>	\$7,301	<u>60.7%</u>
<b>Note:</b> All dollar values are presented in 2005 dollars. <b>Source:</b> 2002 Census of Retail Trade, Claritas, Inc. 2004 Retail SIC Summary data and 2004 Consumer Spending Patterns data, AKRF, Inc.			

As noted above in Future Without the Proposed Actions, a capture rate was not calculated for the building materials category in the 3-Mile Trade Area because these stores tend to have a regional draw far beyond the bounds of the 3-Mile Trade Area. Existing building materials stores deal primarily with professional builders and maintenance contractors, rather than do-it-yourself homeowners and condominium owners (which is a very limited market within the 3-Mile Trade Area). In addition, none of the existing stores serve as anchors to major shopping streets.

Given that the proposed actions would not substantially raise the capture rate within the 3-Mile Trade Area, the Proposed Project would not have the potential to adversely affect competitive stores throughout the trade area.

### *Potential Impacts on Local Shopping Areas*

As described in the *CEQR Technical Manual*, competitive effects on stores closest to a project site can occur even when there are still substantial unspent dollars within a trade area. While competition does not constitute a significant adverse impact under CEQR guidelines, when competition adversely affects neighborhood character, it could constitute a significant adverse impact. If anchor stores have the potential to affect the operations of competitive stores located on neighborhood commercial strips, and if these competitive stores are the anchor stores on neighborhood commercial strips, there would be the potential for neighborhood character impacts. The *CEQR Technical Manual* also states that the number and variety of proposed non-anchor stores could accentuate the potential for impacts. The following section focuses on the expected overlap between the anticipated retail uses and the existing retail base in the 3-Mile Trade Area, evaluates the potential for indirect business displacement due to competition, and determines whether potential indirect business displacement could undermine the viability of retail concentrations, thereby leading to significant adverse impacts.

Given the broad range of product offerings anticipated at the Proposed Project, there would be overlap with the existing retail base of the 3-Mile Trade Area, as well as in the broader Primary Trade Area. The most significant overlap would exist in shopping goods categories; within the 3-Mile Trade Area, there are approximately 840 storefronts within major retail corridors (29 percent of all storefronts), including discount general merchandise stores, that primarily sell shopping goods. The existing retail centers offer a broad range of mid-priced and discount apparel and department store merchandise and, because of their close proximity to the Proposed Project, draw their sales from a similar regional trade area. Therefore, a warehouse club and discount department store as part of the Proposed Project would present the most direct competition to these existing mid-priced and discount stores, most notably along 125th Street and Third Avenue in Manhattan, as well as the Concourse Plaza Mall, the Hub, and Fordham Road in the Bronx. In addition, the small and mid-sized non-anchor stores introduced by the project could include merchandise such as electronics and home goods, which could compete with stores in the retail strips of the 3-Mile Trade Area. Due to the projected increases in population and retail expenditures in the Bronx market and their strong competitive position in the market at present, effects on retail corridors in the 3-Mile Trade Area would likely be limited to diversion of some future sales growth rather than cutting into the existing levels of sales. In addition, any diverted sales could be lessened by the positive sales effects generated by intensifying the regional drawing power of the South Bronx.

Nevertheless, the overlap in product offerings between anticipated retail uses and existing retailers would increase local competition, which in turn could lead to the indirect displacement of some existing local retail stores. The retail concentrations outside of the 3-Mile Trade Area (but within the Primary Trade Area) would experience substantially smaller competitive pressures from the Proposed Project, as geographic markets served by each of these retail corridors would have only limited overlap with the Primary Trade Area for the Proposed Project. For reasons described below, the amount of indirect business displacement due to competition would be minimal, is not anticipated to jeopardize the viability of any neighborhood retail strips, is not expected to diminish the level of services provided, and therefore is not anticipated to result in significant adverse impacts due to competition.

*There is outflow of consumer spending.* The capture rate analyses for the 3-Mile Trade Area and the Primary Trade Area as a whole show substantial outflow of consumer spending, particularly for shopping goods, and that sales from the Proposed Project would not represent significant

increases in capture rates for convenience goods, food stores, eating and drinking places, or building materials. Within the shopping goods category, even with the Proposed Project over 60 percent of the 3-Mile Trade Area residents' expenditures for department store merchandise are expected to occur outside of that local area, while more than 70 percent of department store merchandise expenditures by Bronx residents as a whole will occur outside of the Bronx. The primary reason for this substantial outflow is that department stores of any type, i.e., full-line, off-price or discount, have little presence in the Bronx. Currently the existing department stores are capturing 27 percent of the expenditure potential for department stores in the Bronx. A comparison of data from the Census of Population and the Census of Retail Trade indicates that there is one department store for every 225,000 residents in the Bronx. In comparison, neighboring Westchester County has one department store for every 55,000 residents. Bergen County, New Jersey, a short ride across the George Washington Bridge from the Bronx, has one department store for every 40,800 residents. Even within New York City the ratios of department stores per capita are higher. For example, Staten Island has one department store for every 92,000 residents, and Queens has one department store for every 185,000 residents. Instead of diverting sales from the Bronx or Northern Manhattan, the Proposed Project would allow the potential for the Bronx to recapture much of its business from shopping goods sales dollars currently flowing out of the borough and out of New York City as a whole (principally to large-scale retail stores and wholesale clubs in other boroughs, Westchester, and New Jersey).

*Local shopping areas have a higher percentage of convenience goods and neighborhood service stores compared to anticipated retail uses under the proposed actions.* Most of the retail that is proposed for the Gateway Center at Bronx Terminal Market would be destination-oriented shopping (i.e. largely shopping goods in big stores). Because many of the commercial retail strips in the 3-Mile Trade Area cater to a local community, the commercial strips tend to have a higher percentage of neighborhood retail and services stores. Local shopping areas that are neighborhood oriented (i.e., with a higher percentage of neighborhood services or convenience goods) would not compete with the destination retail in the Proposed Project. In most cases, convenience goods stores consist of items that are readily purchased in stores more convenient to home or work and generally do not require comparison shopping.

As shown in Table 3-45, within the Bronx sub-area, retail strips such as Third Avenue, The Hub, and Fordham Road have the highest percentage of shopping goods stores (at least 43 percent) compared to other retail strips which have shopping goods stores making up less than 25 percent of their total stores. Much of the retail found in these areas include local or national stores that merchandise to the local market such as VIM, Foot Locker, Modell's, and Payless Shoe Source.

West 125th Street in Manhattan also has several shopping goods stores such as H&M, Marshall's, Nine West, Ann Taylor, and Staples that largely cater to local area residents. While there would be direct competition with such stores from products sold as part of a warehouse club or discount department store as part of the Proposed Project, consumers will continue to be drawn to these existing retail concentrations because of the high density of shopping goods stores that provide a wider variety of product selection and price points, particularly with respect to apparel, than is typical of larger discount department stores. In addition, those retail strips that do contain a high percentage of shopping goods stores—including Third Avenue, The Hub, Fordham Road, and 125th Street—have historically withstood competitive pressures created by substantial additions of destination retail in the surrounding areas.



**Table 3-45**  
**Retail Mix in the 3-Mile Trade Area**

Retail Area	Shopping Goods	Bldg Materials, Hardware, Garden Supplies	Auto-Related Trade	Convenience Goods	Eating and Drinking Places	Neighborhood Services	Vacant Stores
East 138th Street, BX	19.7%	0.7%	1.3%	22.4%	12.5%	22.4%	17.0%
The Hub/149th Street, BX	51.2	0.5	1.4	6.1	8.9	16.0	16.0
East 161st Street, BX	19.6	0.0	3.9	9.8	25.5	29.4	11.8
Concourse Plaza Mall, BX	64.7	0.0	0.0	17.6	5.9	11.8	0.0
Fordham Road, BX	58.8	0.0	3.8	7.6	9.7	13.9	6.3
East 116th Street	32.6	0.0	0.0	15.5	17.8	26.4	6.2
West 116th Street	17.4	1.2	0.0	9.3	12.8	25.6	33.7
East 125th Street	41.0	0.8	2.0	10.0	17.7	19.7	8.8
West 125th Street	22.9	2.1	1.0	12.5	14.6	33.3	13.5
Third Avenue	43.4	2.1	3.5	18.2	11.2	15.4	6.3
Malcolm X Boulevard	14.4	1.1	0.0	20.1	13.8	35.1	15.5
Adam Clayton Powell, Jr. Boulevard	9.6	2.0	0.0	18.9	9.3	28.2	31.9
Frederick Douglass Boulevard	11.0	0.0	1.9	25.8	12.9	19.4	25.8
Broadway (Manhattanville)	24.0	1.4	1.4	22.3	14.5	26.5	10.0
Broadway (Hamilton Heights)	26.5	1.1	0.5	19.6	14.8	28.0	9.5
Broadway (Washington Heights)	24.1	1.0	0.5	22.0	17.3	28.3	6.8
West 181st Street	29.7	2.0	2.0	18.2	11.5	27.7	8.8
Dyckman Street	42.6	0.9	0.0	16.5	12.2	19.1	8.7
<b>Notes:</b> Tabulation includes storefronts along major retail corridors within the 3-Mile Trade Area. More detailed retail survey data are provided in Tables 3-20 through 3-34. <b>Source:</b> Field surveys conducted by AKRF, Inc. in Summer 2004 and Summer 2005.							

*Many local shopping areas cater to specific ethnic groups.* Many neighborhoods in the 3-Mile Trade Area have a distinct character in terms of income levels and ethnic background of their residents. These shopping strips reflect the income and ethnic patterns of their local neighborhoods, with local retailers specializing in specialty goods and services familiar to specific ethnic community and frequently doing business in a foreign language. For example, shopping areas such as those found in East Harlem, Central Harlem, and Washington Heights cater to ethnic populations, respectively Hispanic, West African, and Dominican. By focusing on a specific, and in some cases, geographically small local market area, these retail concentrations in the 3-Mile Trade Area have maintained strong local support.

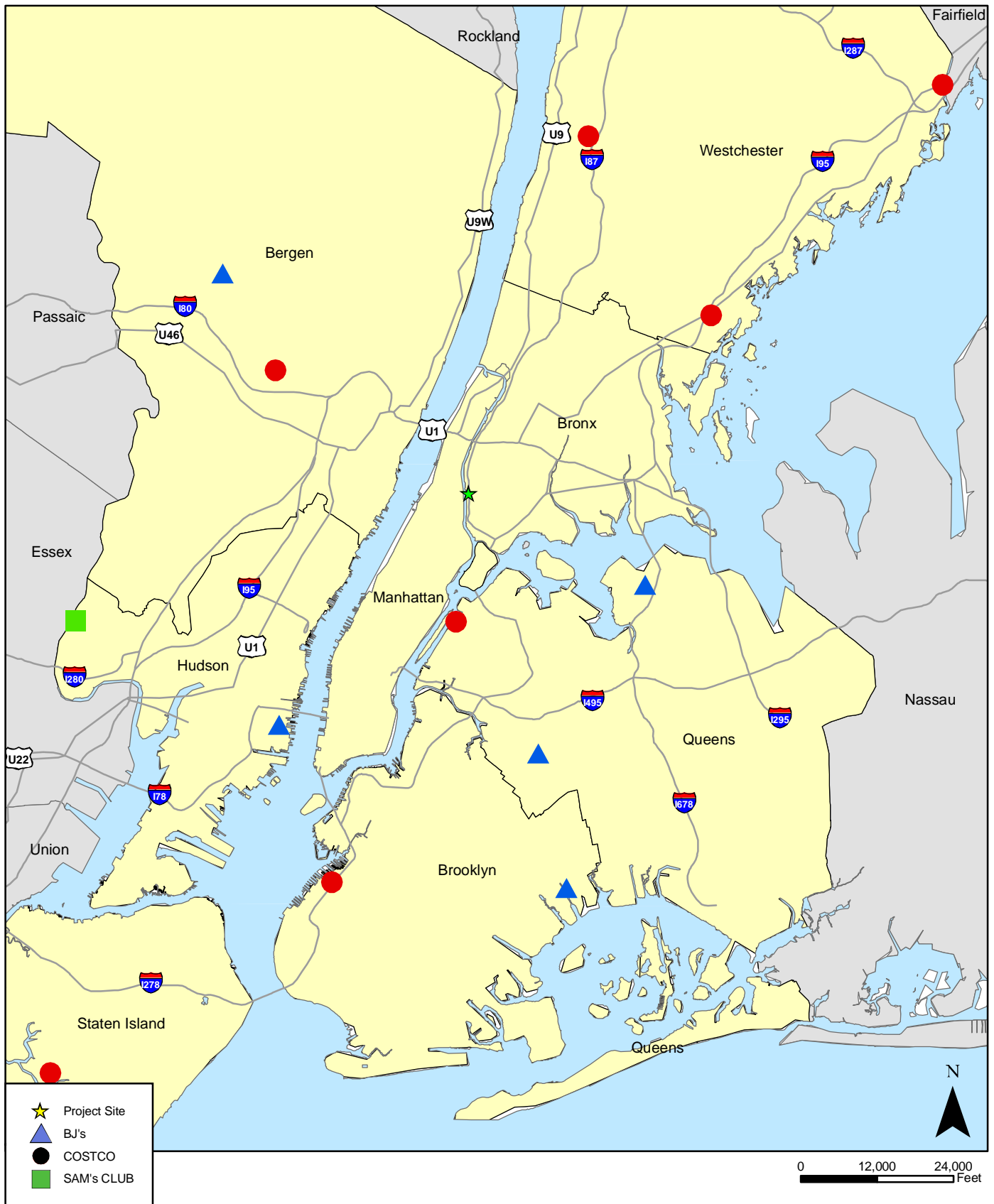
*Many local shopping areas are located in close proximity to transportation hubs.* Retail areas such as The Hub, 125th Street, and Fordham Road, in addition to being located near residential areas, are also located at or near transportation hubs, and draw business from foot traffic to and from the transportation hub. With their close proximity to bus routes and subway lines, these areas would not be significantly impacted by the proposed actions as the residential and commuter population would continue to find it convenient to shop along these corridors.

*Many retail strips are located within major residential areas or central business districts.* Many of the commercial retail strips in the 3-Mile Trade Area, such as the Hub and 149th Street, East 161st Street, Fordham Road, and 125th Street are also surrounded by dense residential









Warehouse Clubs Within  
Vicinity of Project Site  
Figure 3-5

neighborhoods and will continue to draw significant numbers of customers from the local population. In addition, the commercial districts associated with these retail concentrations include major office, institutional, and community uses that will continue to generate an employee population that supports these shopping areas. Thus, it is unlikely that they would be significantly impacted by the Proposed Project.

#### *Effect on Local Food Stores*

As described in the “Existing Conditions” section, the 3-Mile Trade Area contains a wide variety of food and beverage stores, including a number of large chain supermarkets as well as smaller independent stores such as delis and grocery stores, meat and fish markets, fruit and vegetable markets, and retail bakeries. Supermarkets and grocery stores in the 3-Mile Trade Area include a few large chain supermarkets, such as Pathmark and Western Beef. Most of these supermarkets are not part of major retail concentrations and some are located in free-standing buildings in primarily residential neighborhoods. In addition, there are many smaller supermarket chains, such as Met Food, Associated, and C-Town, that are often located on major shopping streets (although some, like the larger supermarkets) are located in the ground floor of residential buildings not associated with major retail concentrations). Based on retail surveys conducted, there are approximately 311 food stores in the 3-Mile Trade Area. Of those, roughly 247 are grocery stores, bodegas, or supermarkets selling a variety of grocery items, and 64 are specialty stores such as meat and fish stores and bakeries. Figure 3-4 shows the location of selected supermarkets in the 3-Mile Trade Area, and their geographic relationship to the major retail corridors surveyed as part of this study. The names and addresses of each supermarket are provided in Table 3-46.

The development of a supermarket or wholesale club as part of the retail mix of the Proposed Project would not be expected to have an adverse effect on the area’s small and medium-sized food and beverage stores. Specialty stores like meat and fish stores and bakeries are generally patronized by neighborhood residents who value the convenience of shopping at a smaller store located near to their home, and the high quality of goods and personal service that can be offered by stores that specialize in certain food products. A wholesale club or chain supermarket would not offer this same convenience or specialized service, and business at specialty food and beverage stores is not expected to be significantly affected by either a wholesale club or a chain supermarket.

Small- to medium-sized, independently-owned grocery stores, bodegas, and delis serve a retail function similar to specialty food stores, though they offer a wider variety of food items. In general, these smaller supermarkets tend to act as convenience stores, where customers make frequent trips and purchase fewer items that are in immediate demand, such as milk or bread, or housekeeping supplies such as light bulbs. While shoppers may sometimes purchase these types of goods at wholesale clubs or large chain supermarkets, they typically do not make frequent trips for convenience goods to wholesale clubs or large supermarkets that are long distances from their homes. Instead, they are likely to continue to fill their more frequent convenience food and beverage needs at smaller, nearby grocery stores.

This tendency to make frequent convenience shopping trips to smaller stores would be reinforced by the fact that the project site is not immediately proximate to a subway station and that approximately 76 percent of household members in the 3-Mile Trade Area do not have a vehicle available to them (compared to 62 percent for Bronx County as a whole). The 24 percent automobile ownership rate indicates that while many local households may make trips to a

**Table 3-46**  
**Selected Supermarkets in the 3-Mile Trade Area**

NUMBER	NAME	ADDRESS
1	Met	250 Willis Ave
2	Bravo	640 Courtlandt Ave
<b>3</b>	<b>Food Bazaar</b>	<b>214 E 161st St</b>
4	Associated	Sherman Ave & McClellan St
5	Met	256 E 167th St
6	Associated	1136 Ogden Ave
7	Bravo	208 E 170th St
8	Associated	148 E 170th St
9	C Town	1468 Jerome Ave
10	Bravo	248 E 174th St
11	C Town	1750 University Blvd
12	C Town	35 Richman Plz
13	Bravo	127th W Burnside Ave
14	Associated	40 W Burnside Ave
15	Bravo	60 W 183rd St
16	C Town	2358 university Ave
<b>17</b>	<b>Associated</b>	<b>2467 Jerome Ave</b>
18	Bravo	2481 Valentine Ave
19	C Town	183rd St & Creston
20	Bravo	2285 Grand Concourse
21	Associated	148 E Burnside Ave
22	C Town	309 E Burnside Ave
<b>23</b>	<b>Western Beef</b>	<b>4269 Park Ave</b>
24	C Town	668 Crescent Ave
<b>25</b>	<b>Pathmark</b>	<b>961 E 174th St</b>
<b>26</b>	<b>Western Beef</b>	<b>Southern Blvd &amp; 173rd St</b>
<b>27</b>	<b>Fine Fare</b>	<b>1472 Boston Rd</b>
<b>28</b>	<b>Food Bazaar</b>	<b>Fulton Ave &amp; St. Paul's Pl</b>
29	C Town	3690 3rd Ave
30	C Town	630 E 169th St
<b>31</b>	<b>Western Beef</b>	<b>1041 Prospect Ave</b>
32	Fine Fare	1065 E 163rd St
33	C Town	809 Southern Blvd
34	Bravo	745 Westchester Ave
35	Met Food	Westchester Ave & Trinity Pl
36	C Town	3220 3rd Ave
37	C Town	309 E 115th St
38	Fine Fare	2330 1st Ave
<b>39</b>	<b>Pathmark</b>	<b>160 E 125th St</b>
40	Associated	448 Lenox Ave
41	C Town	2217 7th Ave
42	Bravo	2395 Frederick Douglas Blvd

**Table 3-46 (cont'd)**  
**Selected Supermarkets in the 3-Mile Trade Area**

NUMBER	NAME	ADDRESS
43	Met	1316 Amsterdam Ave
44	C Town	560 W 125th St
<b>45</b>	<b>Fairway</b>	<b>2350 12th Ave</b>
46	C Town	3320 Broadway
47	Met	592 Lenox Ave
48	Fine Fare	2444 7th Ave
49	Pioneer	2497 Adam Clayton Powell
50	Met	2541 7th Ave
<b>51</b>	<b>Pathmark</b>	<b>145th St &amp; 8th Ave</b>
52	Foodtown	148th St & St. Nicholas
53	C Town	1016 St Nicholas Ave
54	C Town	1314 St. Nicholas Ave
55	Bravo	1331 St Nicholas Ave
56	Bravo	4261 Broadway
<b>57</b>	<b>Key Food</b>	<b>4365 Broadway</b>
58	International Fine Food	4776 Broadway
<b>59</b>	<b>Pathmark</b>	<b>410 W 207th St</b>
<b>Notes:</b> Supermarkets greater than 10,000 square feet are listed in <b>bold</b> .		
<b>Sources:</b> AKRF Field Survey, June 2005.		

wholesale club that would be part of the Proposed Project once in a while (in cars with friends or family, or by private car service), they are not likely to do their more frequent grocery shopping there. In general, smaller grocery stores would continue to meet the demand by local residents in the 3-Mile Trade Area for convenience food purchases, and these stores would not be affected by competition from a wholesale club at the project site.

Stores that are most likely to experience competitive pressure from a wholesale club or large chain supermarket are other large chain supermarkets. This is because some local residents who currently shop in bulk or “stock up” at existing local supermarkets could decide to do their bulk shopping at the potential Gateway Center at Bronx Terminal Market supermarket or wholesale club instead. However, there are a number of reasons why the supermarket and wholesale club contemplated under the proposed actions would not result in significant adverse impacts to neighborhood character due to competition:

*Some portion of sales at wholesale club would be diverted from sales at other wholesale clubs.* Although specific tenants have not been confirmed for the Proposed Project, it could potentially produce the first major wholesale club in the Bronx. As shown in Figure 3-5, there are 13 national wholesale clubs (BJ’s Wholesale Club, Costco and SAM’s Club) located in areas surrounding the Bronx, including Westchester County, Queens, and nearby parts of New Jersey, but no major wholesale club in the borough itself. Some residents of the Bronx currently shop at wholesale clubs outside of the borough, particularly those located nearby in Westchester and Queens. If the Proposed Project is built, many of these residents would shop at the new store more conveniently located in the Bronx, rather than traveling to stores outside of the borough.

Therefore, some portion of sales at the Proposed Project's wholesale club would represent sales that have been diverted from other wholesale clubs, not from local supermarkets.

*There is an outflow of consumer spending.* The capture rate analyses for the 3-Mile Trade Area and the Primary Trade Area as a whole show that sales from a new supermarket and wholesale club would increase the capture rates for food stores only modestly. As discussed earlier, it is common for convenience goods stores in general and food stores in particular to have higher capture rates than shoppers' goods stores because people tend to purchase convenience goods at stores that are close to home. As shown in Tables 3-43 and 3-44, the food store capture rates for both trade areas change very little from existing conditions to the future without the Proposed Project to the future with the Proposed Project are low even in the future with the Proposed Project —48.9 percent and 57.4 percent for the Primary and 3-Mile Trade Areas, respectively. Overall, the Proposed Project would allow the borough to recapture some of its business from sales dollars currently flowing out of the Bronx and out of New York City as a whole, particularly to those wholesale stores depicted in Figure 3-5.

*Local grocery stores will remain more convenient to many shoppers.* As described above, approximately 76 percent of residents in the 3-Mile Trade Area do not have access to a car. These people will likely continue to do a majority of their food shopping at grocery stores closest to their homes and closest to public transportation. It is therefore unlikely that a large portion of their sales would be diverted from local grocery stores to a wholesale club or major supermarket at the project site. In addition, the central locations of local grocery stores put them at an advantage over the project site in some respects. Residents are likely to combine shopping trips for groceries with errands such as trips to the bank or dry cleaner, and may also shop for retail goods such as clothing, shoes, or books on the same trip. Many of the smaller grocery stores in the 3-Mile Trade area are located along major commercial corridors that offer a variety of convenience goods, shopping goods, and neighborhood services, or in small retail clusters that include other basic convenience goods stores. Many residents, even those with access to a car, would continue to do the majority of their grocery shopping at these supermarkets because of the opportunity they provide for easily combining trips.

*Supermarkets offer a broader selection of merchandise compared to a wholesale club.* The selection of grocery items at the wholesale club would not be comparable to the selection offered at supermarkets within the 3-Mile Trade Area. As an example, according to the BJ's Wholesale Club's 2004 SEC Filing (Form 10-K), the corporation limits the number of different items offered in each product line, carrying an average of approximately 7,500 active stockkeeping units (SKU's) at any one time. In contrast, the filing indicates, supermarkets normally stock between 30,000 and 52,000 SKU's. Shoppers who prefer to have a wide assortment of items to choose from will continue to shop at area supermarkets.

*Cost of membership will discourage some from shopping at a wholesale club.* Households are required to purchase a wholesale club membership card in order to shop at the store. The cost of a membership card at wholesale clubs is typically about \$40 per household. This may serve as a barrier to some households in the 3-Mile Trade Area. Households who are not able, or choose not to pay a \$40 membership fee will continue to shop at local supermarkets.

*Individual supermarkets in the 3-Mile Trade Area are not critical to the survival of local shopping centers.* As described above, existing supermarkets are unlikely to experience a significant decrease in sales as a result of competition from a potential wholesale club or supermarket in the proposed Gateway Center at Bronx Terminal Market for a variety of reasons. As also described above, indirect displacement due to competition in itself does not constitute a

significant adverse impact under CEQR guidelines. Only if proposed stores have the potential to affect neighborhood character by affecting the viability of neighborhood shopping areas is there a potential for significant adverse impacts. As shown in Figure 3-4, the 3-Mile Trade Area contains approximately 59 supermarkets, of which 12 are large chain supermarkets. As noted above, smaller supermarkets such as Met Food and C-Town typically with less than 10,000 square feet of space primarily serve the convenience shopping needs of local residents, i.e., frequent trips for smaller purchases, and so would not directly compete with the food stores in the Proposed Project. Even though one or more of these smaller supermarkets may be present on a local shopping street, they do not typically anchor the commercial mix and are not critical to the survival of surrounding stores, and so would not adversely alter neighborhood character even if they were to be negatively affected by competition. The section below evaluates the extent to which large chain supermarkets might be vulnerable to competition from a potential wholesale club and supermarket at the Gateway Center at Bronx Terminal Market, and whether or not these supermarkets are critical to the survival of the neighborhood commercial strips or shopping centers in which they are located. Overall, the Proposed Project is not expected to alter the number of businesses and services that are located on commercial corridors. The number of food stores or vacant storefronts is not expected to change as a result of the proposed actions.

**Associated Supermarket on Jerome Avenue between Fordham Road and West 190th Street in the Bronx:** Located just north of the Fordham Road retail corridor, this Associated supermarket primarily serves the dense residential neighborhoods immediately to the north and south of Fordham Road. As described above, Fordham Road is a major shopping destination with a total of 238 stores including a variety of shopping goods stores selling furniture, clothing, and electronics, but only a limited number of convenience goods stores. It is likely that many of the nearby residents purchase their convenience goods at this Associated supermarket, and would continue to do so with or without the addition of a supermarket or wholesale club at the Gateway Center at Bronx Terminal Market. The Associated supermarket is approximately 3 miles from the project site, lessening the likelihood that customers would travel this distance for convenience purchases. In addition, the Associated store is at the far western end of the Fordham Road shopping district, and any potential change in its viability would not jeopardize the overall vitality of the Fordham Road commercial district.

**Western Beef on East 178th Street between Webster and Park Avenues in the Bronx:** This Western Beef in the Tremont section of the Bronx is a free-standing store with a parking lot in front. The supermarket is north of the Tremont Avenue commercial corridor, and so it does not serve as an anchor for other retail stores in the area. As shown on Figure 3-4, this Western Beef is the only large supermarket serving the neighborhoods of Bathgate, Belmont, and East Tremont, which are situated east of Webster Avenue and north of 174th Street. Therefore it is unlikely that the store would lose a significant amount of sales to a potential wholesale club or supermarket in the proposed Gateway Center at Bronx Terminal Market, given the residential density in the area, the demand for convenience shopping, and distance from the project site.

**Pathmark, Western Beef, and Fine Fare in Crotona Park East in the Bronx:** Identified as numbers 25, 26, and 27 on Figure 3-4, these three large supermarkets are all located just east of Edward Stevenson Boulevard (Boston Road) in the Crotona Park East neighborhood of the Bronx. Pathmark is located on East 174th Street and Vyse Avenue; Western Beef is located at Southern Boulevard and East 173rd Street; and Fine Fare is located at Boston Road and James Polite Avenue. None of the stores are located within major commercial corridors. All three stores serve the densely populated residential neighborhood of Crotona Park East. The Pathmark is a large store situated in a small strip center that includes several small stores, but does not



anchor nearby commercial areas on Boston Road and Tremont Avenue. Like Pathmark, Western Beef and Fine Fare are large stores with ancillary parking lots. Because these stores are situated in such a densely populated residential area, it is very likely that would continue to experience high demand for food and grocery items from the surrounding neighborhoods. In addition, these stores are located between approximately 2 and 3 miles from the project site, a distance that would deter shopping trips for convenience items. Overall, it is not expected that these supermarkets would experience detrimental competitive effects from a new supermarket or wholesale club at the Gateway Center at Bronx Terminal Market.

**Food Bazaar on Fulton Avenue and St. Paul's Place in the Bronx:** Located just outside Crotona Park in the Claremont section of the Bronx, the Food Bazaar on Fulton Avenue and St. Paul's Place is a large one-story store with a parking lot. The supermarket is not situated on a major retail corridor and does not serve as an anchor for other neighborhood retail. In addition, the density of residential development in the surrounding neighborhood assures that the store would continue to experience demand for food and other convenience items, supporting its continued viability.

**Western Beef on Prospect Avenue between East 165th and 166th Streets in the Bronx:** Similar to the other Western Beef stores in the 3-Mile Trade Area, this Western Beef is a large one-story store with a parking lot near a small cluster of retail stores including a Dunkin Donuts, a Laundromat, and a 99 Cent store. However, the store is several blocks from Westchester Avenue which is a major retail corridor in the Morrisania section of the Bronx. It is likely that a large portion of the store's customer base comes from the public housing complex that occupies three blocks just west of the Western Beef—between East 161st Street and 166th Streets, Trinity and Tinton Avenues—and contains approximately 2,290 housing units. With such a large concentration of population located within blocks of the store, it is not likely that this Western Beef would be negatively affected by competitive pressure from the potential food stores at the Gateway Center at Bronx Terminal Market.

**Food Bazaar at Concourse Plaza in the Bronx:** This Food Bazaar, formerly the location of a Waldbaum's supermarket) is located in the Concourse Plaza Mall, one of the few destination shopping centers in the Bronx portion of the 3-Mile Trade Area. The shopping center itself contains a multiplex cinema, food court, several other retail and service establishments, and a parking deck. While the Concourse neighborhood surrounding the mall contains high-rise residential towers to the north and south, and dense mid-rise residential development to the east, the principal activity in the immediate area is the Bronx courthouse complex and Bronx Borough Hall. Despite its relative proximity to the project site, the adjacent residential development is likely to continue to provide a viable convenience market for the Food Bazaar. In addition, the immediate presence of the courthouses generates a large number of workers and visitors who would very likely continue to patronize the Food Bazaar because of its extremely convenient access to the court complex.

**Pathmark on West 207th Street and 10th Avenue in Manhattan:** Pathmark on 207th Street is free-standing store with a parking lot, surrounded primarily by industrial uses. For example, New York City Transit's 207th Street Subway Shops and Yards is directly north of the Pathmark. While there is some retail activity along West 207th Street as it rises west of 10th Avenue, the Pathmark does not serve as a critical anchor to the area. In fact, because of its parking lot and proximity to the 207th Street Bridge, the supermarket attracts customers from throughout the Inwood neighborhood and beyond, including the University Heights neighborhood across the Harlem River in the Bronx. Thus, any potential competitive pressures

from the Proposed Project would not result in significant adverse impacts to the nearby retail activity.

**Pathmark on West 145th Street and Frederick Douglass Boulevard in Manhattan:** Located in the ground floor of the recently constructed Bradhurst Court, this Pathmark serves the Manhattanville and Hamilton Heights neighborhoods which are targets for NYCHPD's Neighborhood Entrepreneur Program (NEP) and Neighborhood Revitalization Program (NRP). The store does not have its own parking lot, but with proof of purchase from Pathmark, shoppers can park for free in the parking garage that serves the residential development. West 145th Street is not a major commercial strip, nor is Frederick Douglass Boulevard in this area. In addition, the anticipated development of new residential uses in the area would increase demand for the Pathmark, and buffer it from any potential competitive pressure from a potential wholesale club and supermarket in the proposed Gateway Center at Bronx Terminal Market.

**Fairway on Twelfth Avenue and West 133rd Street in Manhattan:** The Fairway located on Twelfth Avenue and West 133rd Street is situated near the Hudson River waterfront and is surrounded primarily by industrial and transportation-related uses. Its fame as a retailer of high quality foods at reasonable prices, and its parking lot allows the store to attract customers from a broad region that includes Manhattan, the Bronx and beyond. Upper West Side patrons, in particular, would continue to frequent Fairway rather than the potential wholesale club or supermarket at the Gateway Center at Bronx Terminal Market because of the store's reputation for value and quality, and its convenient location and easy accessibility via Riverside Drive or the No. 1 subway line. The store does not serve as an anchor to any neighborhood retail concentration. Therefore, it is unlikely that the store would be negatively affected by competition from the Proposed Project.

**Pathmark on East 125th Street between Lexington and Third Avenues in Manhattan:** The East 125th Street Pathmark is located between Lexington and Third Avenues, at the crossroads of the Lexington Avenue retail corridor and the 125th Street retail corridor. As described earlier, the Lexington Avenue retail corridor is primarily oriented to neighborhood services and shopping needs. Due in part to this neighborhood services orientation and the density of residential development in the surrounding area, Pathmark will continue to attract local shoppers who will look to combine shopping for groceries with trips for other services such as banking, beauty parlors, and medical offices. In addition, the location of this Pathmark is a particularly desirable one, since 125th Street is one of the most active retail corridors in the 3-Mile Trade Area. As described earlier, 125th Street has a variety of chain retail stores such as H&M, Payless Shoes, The Body Shop, Duane Reade, and Rite Aid. The presence of other major brand shoppers and convenience goods stores and the high level of retail activity in the area indicate that even in the unlikely event that this Pathmark were displaced due to competition, it would not have an adverse impact on neighborhood character; with such a high density of residents and commercial foot traffic in the area, another retail tenant would re-tenant the vacated space quickly.

In conclusion, the retail that would be introduced by the proposed actions would overlap with the existing retail base in the 3-Mile Trade Area and in the Primary Trade Area as a whole, which in turn could lead to some indirect business displacement due to competition. However, the competitive pressure generated by the proposed actions would not jeopardize the viability of any retail strips in the area, and no significant adverse socioeconomic impacts would result. The capture rate analysis indicates that there is still a substantial outflow of consumer expenditure such that the proposed actions would not generate a critical mass that would adversely affect competitive stores. To the contrary, the proposed actions would help retain retail sales dollars,

tax revenues, and employment opportunities in New York City while enhancing the retail selection available to its residents.

Trends have shown that retail strips have maintained strong customer bases even with the introduction of large amounts of destination retail in the trade area (e.g., the existing Concourse Plaza Mall, Fordham Road, The Hub in the Bronx, and 125th Street in Harlem). Local shopping areas have exhibited an ability to adapt to changing demographics and consumer bases over time, and businesses that are indirectly displaced would be replaced with other retail uses that can better capitalize on changed market conditions. While the composition of the retail mix continually changes to adapt to changing demand, the viability of shopping areas has been maintained. Large discount department stores exist in the trade area, and shopping goods continue to be sold on these local strips. There are many neighborhood shopping streets throughout New York City where local and national chains (similar to those located on shopping streets in the Bronx Terminal Market trade area) are found in close proximity to major shopping centers with no apparent negative impacts. For example, Austin Street in Queens contains many local and national retailers such as Banana Republic that are also found within Queens Center Mall. Other similar examples include Harlem USA on West 125th Street in Manhattan and the Atlantic Center Mall along Atlantic Avenue in Brooklyn. Harlem USA, which is a retail and entertainment complex with retail stores such as Old Navy, The Disney Store, HMV Records, Modell's Sporting Goods, and the New York Sports Club, is located in close proximity to other major local and national retailers on West 125th Street such as Marshall's, Ann Taylor, Nine West, and H&M. The 400,000 square foot Atlantic Center Mall, which includes tenants such as Old Navy, Pathmark, and Burlington Coat Factory, is located among other Atlantic Avenue retailers such as P.C. Richards, Modell's Sporting Goods, Walgreens, Duane Reade. In addition, adjacent to the Atlantic Center Mall is the recently-opened Atlantic Terminal Mall, which includes retail tenants such as Target, Gap, Victoria's Secret, and Children's Place.

Competitive pressure generated by a chain supermarket or wholesale club would be felt most strongly by major supermarkets in the 3-Mile Trade Area. Smaller food stores and shopping goods stores would experience more moderate competitive pressure, if any, and neighborhood services stores and eating and drinking places would not be adversely affected. Local residents would continue to shop at existing food stores and shopping goods stores for reasons cited above—convenience, variety and selection of items, public transit accessibility, and absence of membership fees. Furthermore, some proportion of shoppers at the Proposed Project's wholesale club would be Bronx residents who currently shop at wholesale clubs outside of the borough. Purchases from these households would represent sales captured from other wholesale clubs, rather than local supermarkets or general merchandise stores. Finally, the capture rate analysis indicates that the incremental sales captured by the potential supermarket and wholesale club would not generate a critical mass that would adversely affect competitive stores. The Proposed Project is not expected to alter the number of businesses and services that are located on commercial corridors in the Primary or 3-Mile Trade Area, and vacancy rates are not expected to change in the future (with the exception of a few locations in Harlem, where vacancies are expected to decrease as a result of redevelopment). While the possibility of some limited indirect business displacement due to competition can not be ruled out, any displacement that might occur would not jeopardize the viability of any local retail strips, and therefore would not be considered to be a significant adverse impact under CEQR. \*