

New Jersey Pinelands Commission

Long Term Economic Monitoring Program



2014 Annual Report

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**NEW JERSEY PINELANDS LONG-TERM ECONOMIC
MONITORING PROGRAM
*2014 ANNUAL REPORT***

May 2015

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The report is available for review on the Pinelands Commission's website at <http://www.nj.gov/pinelands>. The raw data used to create the report will also be available for download.

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Executive Summary

The *2014 Long Term Economic Monitoring Report*, covering data from 2013, provides the results of the ongoing monitoring program that tracks economic conditions in the Pinelands Region. The Pinelands is the nation's first Federal Reserve. Established in 1978, it covers an area of more than one million acres in the heart of southern New Jersey. The Pinelands Comprehensive Management Plan (CMP) was adopted in 1981. The Plan establishes minimum standards for land use throughout the region. These standards are implemented at the local level through municipal ordinances.

This report presents demographic data and describes key trends in the areas of population, real estate, economic growth, and municipal finance. Several core variables are continually monitored in each of these areas every year. The basic unit of analysis is determined by data availability. Municipal-level data is available in most cases, and county-level data is utilized where municipal data is not available. During the past several years, data for some variables at the block group, census block, and even street-level has been added to the report. The general analytical approach involves comparing economic trends (from 1980 onward) of Pinelands municipalities to other regions outside of the Pinelands Area (i.e., Non-Pinelands in southern New Jersey and the state as a whole).¹ In this report, the "Pinelands" refers to an aggregate of 47 municipalities that have at least 10% of their land area within the state-designated Pinelands Area. The "Non-Pinelands" refers to an aggregate of the remaining 155 municipalities in the eight counties of southern New Jersey. Trends inside and outside the Pinelands Area boundary can then be distinguished at those sub-municipal geographic levels. Beginning with the 2013 iteration of the report, datasets purchased by the Commission provide some variables with additional data at the block-group level, thereby increasing accuracy. In the 2014 iteration, point data for some variables became available and were added as appropriate.

Population

The population in the Pinelands continues to grow. The 23rd United States Census issued in 2010 showed that the Pinelands municipal aggregate population has reached 698,000 people; a 13% increase over the population in 2000. In 2013, the population estimates show that the Pinelands municipal aggregate grew to 705,000 (up 0.2% from 2012). Conversely, population in the Non-Pinelands municipal aggregate actually *decreased* from 2012 by 0.1%.

Real Estate

Data for local residential values and development show indications of a possible housing market recovery. On average, Pinelands municipalities issued 31 residential building permits in 2013; 6 more building permits than in 2012 (an increase of 25%). While the increase in permits issued is encouraging, the increase is less than that of the Non-Pinelands and the state, which increased their averages by 57% and 35%, respectively.

New to the *2014 Annual Report*, point data is available for the number of home transactions and selling price variables. The number of homes sold in the Pinelands Area totaled 1,489 at an average price of about \$229,000. At the municipal level, Pinelands municipalities averaged 89 homes sold (an increase of 34% since 2012). That's more than both the averages for the Non-Pinelands (66 homes sold, up 7%) and the state (88 homes sold, up 21%). Average home prices continued their decline across the state, with the average Pinelands home price declining by 5%, the Non-Pinelands down by 6%, and the state down by 2%.

¹ An ongoing challenge is how to best apportion data in municipalities split by the Pinelands Area boundary (42 out of 53 municipalities straddle the Pinelands Area boundary).

This year's supplemental variable is census housing data. This 2010 census block-level data revealed that there were about 118,555 housing units inside the Pinelands Area boundary (a 16% increase from 2000). Of these, 6% are vacant (non-seasonally), and of those that are occupied, 17% are renter-occupied.

Economic

Estimated unemployment rates declined throughout the state in 2013. Rates in the Pinelands declined to 9.3% (down 1.3 points from 2012) while the Non-Pinelands' rate declined to 9.1%. The number of establishments in the Pinelands municipalities continued to decline in 2013 to a total 12,409 (down 1% from 2012). Based on block-group level data, retail and construction made up the greatest proportion of establishments in the Pinelands at 14% each.

In agriculture, blueberry prices fell by 26% to \$1.18 per pound while cranberry prices declined by 32% to 38¢ per pound. The recently released 2012 Census of Agriculture revealed that the farming acreage and the amount of farms in Pinelands counties declined by 1% and 14%, respectively; a trend that is also occurring throughout the state as a whole. Meanwhile, the average Pinelands county farm size rose. Of the \$177 million net cash income from New Jersey farms, 61% came from Pinelands counties.

Municipal Finance

In 2013, the Pinelands municipal average tax bill increased by 1%. However, they were still 14% lower than those in the Non-Pinelands and 37% lower than that of the states' average. Likewise, average effective tax rates in the Pinelands municipalities (2.27) were lower than the Non-Pinelands (2.52), and the state (2.42). This represents 8% increases in the Pinelands and the Non-Pinelands municipal averages.

Equalized property values across the state continued to decline in 2013. However, the drop in values appears to be slowing. The average municipal valuation in the Pinelands and the Non-Pinelands declined by about 4.5% while the state's average valuation only declined by 3.5%.

Special Studies

In addition to ongoing data collection and analysis, special studies represent the second major component of the economic monitoring program. The overall average trends tracked by the Long-Term Economic Monitoring Program can mask the conditions of individual municipalities. In response, the Commission has undertaken a special study that focuses on characterizing and identifying municipalities that are experiencing poor fiscal health. A preliminary draft of the report (available on-line) for the project was released in July 2008 and it may be revisited to update, expand upon, or retool the methods involved.

A second special study currently underway seeks to improve the precision and accuracy of the long-term economic monitoring data. Staff is investigating how alternative data sources can be best used to aid in gathering more precise statistics on municipalities that are "split" by the Pinelands' border. One solution that began with the *2013 Annual Report* is the purchase of block group level data. In this year's report, point data for real estate transactions and pricing was obtained.

Conclusion

Overall, economic and demographic trends in the Pinelands continue to roughly mirror that of the surrounding region. In fact, the Pinelands are actually performing better than other regions in certain categories and in non-recession times. To probe further into the data, the program's special studies have and will provide a greater understanding and analysis of economic trends in the Pinelands, thereby becoming of greater use to the Commission and to local leaders.

1. Introduction

1.1 The Long-Term Economic Monitoring Program

The Pinelands National Reserve was established in 1978 and is the nation's first Federal Reserve. It covers an area of more than one million acres in the heart of southern New Jersey. The Pinelands Comprehensive Management Plan (CMP) was adopted in 1981 and manages land-use activities at regional and local levels. A blend of federal, state, and local programs is responsible for safeguarding the environmental and cultural resources of the region. Of particular importance to the regional economy are land-use policies and controls included in the CMP and implemented by municipalities. Some of these policies and controls significantly limit development in designated Preservation, Forest, and Agricultural management areas and encourage development in other management areas, particularly Regional Growth and Town Areas. These growth areas tend to be located in and around already-developed areas, many of which have access to central sewer systems and other infrastructure. Studies have suggested that the CMP has been successful in steering growth away from conservation areas and toward growth areas.^{2,3}

The economic impact of the CMP on land values, real estate markets and local government finances is of major interest to land-owners, residents and businesses in the region. So, too, is the economic performance of farms and businesses. Since the adoption of the CMP, the Commission has conducted a number of studies to address these issues (see Appendix B). These efforts, while directed at measuring the short-term impacts of the CMP, have recognized the importance of monitoring economic and fiscal impacts during the long term.

As part of its second full review of the CMP, the Commission convened a panel of economic experts in 1992 to review the prior studies and develop recommendations for future Commission efforts. Later that year, the Commission formally endorsed the panel's recommendation to monitor the region's economy on a continuing basis. Consequently, the Pinelands Commission prepared a proposal (July 1994) to the National Park Service to institute a long-term economic monitoring program. The program was incorporated into a September 1994 Cooperative Agreement between the two agencies.

The *New Jersey Pinelands Commission Long-Term Economic Monitoring Program First Annual Report* was released in 1997, following three years of planning. The document, the first in a series of annual reports, presented data and described trends for key indicators in the areas of property values, economic growth, and municipal finance. The *First Annual Report* and its accompanying Executive Summary also identified potential topics for future study. Subsequent annual reports updated most of the data in the *First Annual Report*. This *Annual Report*, which covers data from 2013, is the seventeenth in the series and augments most of the data used to develop the previous reports, but also includes a variety of information not found in previous reports. A copy of this *Annual Report* can be obtained on CD-ROM by writing to the Pinelands Commission at P.O. Box 359, New Lisbon, New Jersey 08064. The report is also available on the Pinelands Commission web site at <http://www.nj.gov/pinelands>.

1.2 Program Goal and Objectives

The fundamental goal of the Long-Term Economic Monitoring Program for the Pinelands is **to continually evaluate the health of the economy of the Pinelands region in an objective and reliable way**. The economic monitoring program, in conjunction with an ongoing environmental monitoring program, provides essential information for the Pinelands Commission to consider as it seeks to meet the mandates set forth in the federal and state legislation concerning the Pinelands.

² See "Managing Land Use and Land-Cover Change: The New Jersey Pinelands Biosphere Reserve" by Walker and Solecki, *Annals of the Association of American Geographers*, 89(2), 1999, p. 220-237.

³ See "Tracking New Jersey's Dynamic Landscape: Urban Growth and Open Space Loss 1986-1995-2002" by Hasse and Lathrop, 2008.

The program was designed to accomplish several principal objectives:

1. Address key segments of the region's economy while being flexible enough to allow for the analysis of special topics that are identified periodically;
2. Establish a means for comparing economic segments of the Pinelands with similar areas in the state not located within the Pinelands designated boundaries;
3. Establish a means for evaluating economic segments over time so that the Pinelands-related trends can be distinguished from general trends;
4. Provide for analyses to be conducted in an impartial and objective manner; and
5. Be designed and implemented in a cost-effective manner so that the program's financial requirements can be sustained over time.

These objectives are accomplished by two means: through the publication of an annual report of indicators and through the commissioning of periodic special studies. The report takes the “temperature” of the regional economy, while special studies take a more in-depth look at specific topics. The following two chapters outline the structure and design of both components.

1.3 Program Administration

The development and implementation of the Long-Term Economic Monitoring Program is a collaborative effort. Under the terms of the cooperative agreement with the National Park Service (NPS), the Commission receives funding for personnel and other resources, including managerial and technical support staff (GIS staff and others on an as-needed basis), expert consultants, data acquisition, equipment, and informational materials. The NPS also can provide oversight and substantive input on an ongoing basis through its own Technical Advisory Committee.

The Commission staff members have primary responsibility for the day-to-day implementation of the program, including acquisition and analysis of data; coordination with the NPS, expert advisory committee, and public; and development of all reports and other products. Perhaps most importantly, the Commission will consider the results of these monitoring efforts as it identifies the need for in-depth economic studies and continues to refine and improve the Pinelands protection policies. The data will also be used for other Commission analyses and independent efforts.

2. Annual Reports

2.1 Data Categories

Ongoing data collection and analysis involves continual monitoring of key economic indicators to establish a historical basis for trend comparison and enable analysis of activity in the Pinelands in relation to regional and statewide patterns. The ongoing reporting of data will allow the Commission to target topics for in-depth research to determine the basis of economic well-being of Pinelands communities and potential cause-and-effect relationships. Data for key variables are collected annually, when possible, and provide information essential to understanding the character of the Pinelands economy. In general, this data is collected from secondary sources. The annually updated data is considered to be the core variables of the report.

The *First Annual Report* included a provision for adding supplemental data, and this provision was used for the first time in the *2003 Annual Report*. This *Annual Report*, which covers data from 2013, includes a look at housing as a supplemental variable. Supplemental variables can provide valuable information and insight into the Pinelands and regional economy. They are not considered core variables because they cannot be updated regularly. For instance, the United States Census data is extremely valuable, but because it is only updated every 10 years, most of it cannot be considered core. If reliable data can be obtained for a sufficient period of time, supplemental variables can become core in the future.

2.2 Core Variables

Four primary areas of inquiry are monitored: population, real estate, the economy, and municipal finance. Within each of these areas, several core variables are monitored. Collectively, these variables provide insight into the overall health of the Pinelands' economy; individually, they offer detailed information on specific features of interest. Table 2.2 identifies the monitoring period, frequency of collection, and the geographic scale of the data collected for the core variables tracked for this report. Each of the variable groups is described below.

Population

This section examines basic information regarding the population of southern New Jersey and the Pinelands that is necessary for any economic or geographic analysis. The core variables in this section are: population at the municipal and census block level, population change, age demographics, and annual population estimates. Population growth drives both consumer demand and reflects labor supply, and therefore is an extremely important indicator of economic growth. Age demographics affect the level and type of municipal services provided and influence housing markets.

Real Estate

The issue of land values is at the heart of many of the controversies generated by the implementation of the Pinelands' land-use regulations. To the extent that development controls affect the value of land, current and prospective landowners will be affected, as will tax rates associated with vacant land. This group of variables identifies trends in development pressures and measures the differences in values of housing and land in different areas of the region. The value of property depends in part on the permitted use that yields the highest rate of return to the owner, often called "the highest and best use." Permitted uses on vacant land and farmland in many parts of the Pinelands have been limited significantly and therefore land prices may be adversely affected.

In addition, land-use regulation may also affect the value, type and supply of housing and other development activities. For example, the implementation of the Comprehensive Management Plan (CMP) has the potential to increase housing prices, both through a reduction in supply in certain areas and by providing a permanent amenity to residents of the region. Conversely, other factors, such as declining or

shifting job markets, if they exist, may cause housing prices to decrease. Building permits, median selling price of homes, and volume of residential real estate transactions are the three variables tracked annually for this variable group.

Economy

The observation of trends in indicators that are directly tied to the prosperity of a region's residents is central to the measurement of the economic well-being of the region. As such, monitoring of employment, income, and the business climate is essential to this program. This group of variables measures the prosperity and viability of business in the region. Tracking economic growth variables over time and comparing them across regions may show differences and indicate areas for special study. To the extent that the CMP has had an effect on the regional economy, there will be both direct and indirect (multiplier) impacts on employment and wages. Impacts (positive or negative) may be substantially different across business sectors.

Seven economic growth variables are tracked annually for this report: (1) retail sales per capita, (2) per capita income, (3) unemployment, (4) employment, establishments, and wages; (5) farmland assessed acreage, (6) Census of Agriculture data, and (7) blueberry and cranberry production.

Municipal Finance

The long-term monitoring of municipal fiscal trends is of interest for several reasons. As discussed in previous studies, Pinelands Commission regulations have affected vacant land assessments in some municipalities (see, for example, *Economic & Fiscal Impacts of the Pinelands Comprehensive Management Plan*, New Jersey Pinelands Commission, 1983 and 1985). In all but one case, however, the short-term impact on tax rates was relatively minor. Public acquisitions of land in a few municipalities have also resulted in a loss of tax ratables. While these problems were mitigated in the short-term by state reimbursement programs, their long-range impacts will continue to be watched.

The level of development in a municipality also affects both municipal ratable bases and expenditures for public services and facilities. Development is associated with growth in ratables, although capital and operating costs for schools, roads, and other public facilities will also increase. Whether development results in a net fiscal benefit or cost to the community depends in large part on the type of development (e.g., commercial, industrial, apartments, single-family houses, or retirement communities). Density may also have an effect.

Five variables are tracked annually for this variable group: (1) average residential property tax bill, (2) state equalized valuation (total value of taxable property), (3) effective tax rate, (4) assessment class proportions in municipal tax revenues, and (5) local municipal purpose revenues and state aid.

Table 2.2

Summary of Core Variables in Annual Report

Name	Years Collected	Years Added	Frequency of Collection	Data Scale ⁴					
				St.	Co.	Mu.	BG	Bl.	Pt.
Municipal Population	1980, 1990, 2000, 2010		Decennial			X			
Census Block Population	1990, 2000, 2010		Decennial						X
Age Demographics	1980, 1990, 2000, 2012		Decennial/Annual			X	X		
Population Estimates	2001-2012	2013	Annual			X			
Building Permits	1980-2012	2013	Annual			X			
Average Selling Prices of Homes	1994-2012	2013	Annual			X			X
Volume of Real Estate Transactions	1994-2012	2013	Annual			X			X
Retail Sales & Establishments	1992, 1997, 2002, 2007		Quintennial		X	X ⁵			
Income	1979, 1989, 1999, 2010, 2012		Decennial/Annual			X			
Unemployment	1990-2012	2013	Annual			X			
Employment	2004-2012	2013	Annual			X	X		
Number of Establishments	2004-2012	2013	Annual			X			X
Wages	2004-2012	2013	Annual			X			
Farmland Assessed Acreage	2009-2012	2013	Annual			X			
Agricultural Census Data	1992, 1997, 2002, 2007	2010	Quintennial		X				
Berry Production	1980-2012	2013	Annual	X					
Average Residential Property Tax Bill	1998-2012	2013	Annual			X			
Equalized Property Value	1998-2012	2013	Annual			X			
Effective Tax Rate	2000-2012	2013	Annual			X			
Assessment Class Proportions	1999-2012	2013	Annual			X			
Local Municipal Purpose Revenues	1999-2012	2013	Annual			X			
2014 Supplemental: Housing Census	1990, 2000, 2010	1990, 2000, 2010	Decennial			X			X

⁴ St. = State, Co. = County, Mu. = Municipal, BG = Block Group, Bl. = Census Block, Pt. = Point

⁵Data for retail sales and establishments are available by county and by economic place. The economic places largely mirror the boundaries of municipalities, however not all municipalities are classified as an economic place. Therefore, data is only available for 32 Pinelands municipalities.

2.3 Supplemental Variables

Supplemental variables can provide valuable information and insight into the Pinelands and regional economy, but are not tracked annually as core variables because they are not updated regularly. If the data is viable and a sufficient time series can be obtained, supplements could become core variables.

The *2014 Annual Report* includes data on housing as a supplemental variable. Census block level housing data is available from the national census every ten years. The block level data allows for an inside/outside the Pinelands Area analysis that is more precise than that of municipal level data. This look at housing data includes the number of units, occupancy, and ownership.

2.4 Geographic Scale: Defining the Pinelands

Concise definitions of the various levels of geography used in this report can be found on page 11, which is the first page of the indicators section. This section provides a detailed geographical description and the definition of the “Pinelands.”

The state-designated Pinelands Area encompasses portions of seven counties in southern New Jersey: Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, and Ocean. There are 53 municipalities that have part or all of their land in the Pinelands Area. Most of the variables monitored in the report are obtained at the municipal level because this is typically the smallest geographic scale available. Municipal values are aggregated into the Pinelands and the Non-Pinelands regions, based on a “10% rule.” Any municipality with at least 10% of its land in the Pinelands Area is considered to be in the Pinelands region and is referred to as a Pinelands municipality; all remaining municipalities in southern New Jersey (those located in the seven counties mentioned above, plus Salem County) are considered to be in the Non-Pinelands region. Of the 53 municipalities completely or partially located in the Pinelands Area, 47 were classified as inside, while six⁶ were classified as outside, joining the remaining 149 municipalities located entirely outside the Pinelands. In summary, the “Pinelands,” as used in this report, refers to 47 municipalities that have at least 10% of their land in the state-designated Pinelands Area, while the “Non-Pinelands” refers to the remaining 155 municipalities of southern New Jersey.

While the aggregate method used in this report is the best currently available, it is not ideal. Many municipalities are split by the Pinelands Area boundary, so activities and phenomena present outside the Pinelands Area boundary are counted as occurring inside the Pinelands Area. In some cases, areas inside a Pinelands municipality (a municipality with at least 10% of its land inside the Pinelands Area boundary), but outside the Pinelands Area boundary, are growing rapidly (or vice versa). This growth can distort the Pinelands aggregate, indicating that the Pinelands is growing rapidly, while in reality much of the growth is occurring just outside of the Pinelands Area boundary (or vice versa).

Obtaining data at a sub-municipal level circumvents this problem. For instance, the population for each municipality in the Pinelands was calculated at the block level to obtain population counts for areas of Pinelands municipalities inside and outside the Pinelands Area boundary. Specifically, in 2000, the results of the count showed that approximately 277,000 people lived inside the Pinelands Area boundary, while approximately 502,000 people lived outside the boundary, but within a municipality that has land in the Pinelands Area. For Pinelands municipalities, population growth between 1990 and 2000 was 5% inside the boundary, and 15% outside the boundary. Clearly, the Pinelands aggregates are including a fair amount of activity actually happening in the Non-Pinelands. Additional data at the census block and census block-group level is being sought. Other methods of obtaining sub-municipal data are also being

⁶ The six are: Corbin City, North Hanover Township, Springfield Township, Berlin Borough, Vineland City, and Toms River Township.

explored, such as using a geographic information system to pinpoint variables with address information to streets, so an inside/outside boundary count can be made. An example of this is the purchase of datasets at the block-group level.

Despite these limitations, the inside/outside Pinelands municipal aggregate system is currently the most viable method for comparing the Pinelands to the Non-Pinelands regions based on data currently available. The census block analysis revealed that certain municipalities with as much as 30% of their land in the Pinelands Area had practically no residents in the Pinelands Area. Analysis has shown that altering the 10% rule in favor of a 20-, 25- or 30% rule yields no significant difference in the value of the aggregates. Strictly identifying whether an activity is occurring inside or outside of the boundary may be unnecessary to some extent, as economic activity occurs regardless of where boundaries exist. Areas inside and outside of the boundary interact economically with each other, and both interact with other regions. Consequently, this report retains the 10% rule to define inside and outside municipalities.

Municipal-level data is unavailable in certain cases. The Agricultural Census and Retail Census are restricted to county-level data. For the Agricultural Census data, the Pinelands counties (Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, and Ocean) are compared to the Non-Pinelands counties (Salem plus the 13 counties of northern New Jersey). For the Retail Census and Covered Employment data (employment, establishment, and wages), information is presented for the eight southern New Jersey counties along with totals for the entire state. Because county-level data are necessarily limited in the amount of geographic information they can convey, a chart showing the contribution of each county to the Pinelands Area acreage is provided in Appendix C to aid in interpretation whenever county data are presented. Blueberry and cranberry production data are available only at the state level, but since these crops are found almost exclusively within the Pinelands, statewide figures provide ample information for the purposes of this analysis.

2.5 Presentation of Data

Data in the *Annual Report* is arranged by variable and grouped into four main sections. Each core variable is designated by section (population, real estate, economy, and municipal finance) and by number. When a new section begins, numeration restarts at 1. For instance, there are population variables 1 through 4, real estate variables 1 through 3, etc. Numbers followed by an “S” indicate supplemental variables. Supplemental variables always appear at the end of a section.

The Pinelands and the Non-Pinelands aggregates are charted, along with state averages. Data is obtained as far back as 1980, when possible. In most cases, averages for each region are calculated by averaging the values for all municipalities in the region. In a few instances, values are not averages but are sums for the region.⁷ For example, retail establishments per capita for each region is calculated by dividing the total population of the region by the total number of establishments in each region. It is not calculated by averaging the ratio of each municipality to get a regional average.

Data is presented by Pinelands municipality for some variables in the form of tables, and certain variables are mapped for all of southern New Jersey. While the aggregates provide a regional picture, the tables and maps illustrate the degree of variation that exists among the municipalities. Tables display and sort data for the 47 “inside” municipalities, and record data for six⁸ of the “outside” municipalities separately at the bottom of the table. The sorting column(s) for each table vary and are indicated by a shaded column heading. Tables and graphs embedded in the text are not enumerated.

⁷ See “Unit of Analysis” for each variable to ascertain whether municipal averages or regional sums are used.

⁸ The six municipalities counted as “outside” the Pinelands in this report have less than ten percent of their land in the Pinelands.

Variables in the *Annual Report* that describe monetary amounts are adjusted for inflation using the Consumer Price Index (CPI-U) from the United States Bureau of Labor Statistics, shown in 2013 dollars, unless otherwise noted. Variables in the Fact Book are not adjusted for inflation, as the purpose is to display the most recent information available and not to monitor change over time.

Indexes were derived for many variables in this report. Indexing is a common technique for characterizing economic time series data, and it measures how variables change over time. Change is measured relative to a pre-selected base period. In this report, the base period selected is usually the first year that data for the variable are available. As an example, if 1988 were selected as the base period for housing transactions, the 1988 index number for housing transactions would be 1.00. The remaining index numbers are calculated by dividing each year's total housing transactions by total 1988 housing transactions. A 1999 index number of 1.10 indicates that 1999 housing transactions are 10% greater than 1988 levels. Portraying multiple indexes for different regions on one graph enables easy comparison of relative changes among those groups.

The Municipal Fact Book was a new addition to the *2002 Annual Report*, and was significantly updated and enhanced for the *2003* and *2004* reports and again for the *2013* report. Economic data are arranged by municipality rather than by variable, in order to provide a better understanding of the unique economic characteristics of each municipality. The fact sheets are arranged alphabetically by county, then by municipality. Variables for each municipality are listed beside the average value for all municipalities in southern New Jersey and the municipality's rank for that variable among the 202 municipalities in southern New Jersey. Fact sheets for each of the southern New Jersey counties are also included in this year's report. The county sheets use the same format as the municipal sheets, with county values displayed beside the average southern New Jersey county value and the county's rank among the eight counties.

The Fact Book is located in Appendix H. Additional resources in the appendix include: a list of reference materials, a table of Pinelands and southern New Jersey acreage by county, a Pinelands municipal location map, a description of the Pinelands Management Areas, a map of the Pinelands Management Areas, and a map of housing unit construction trends at the block group level from the 1940s to the 2000s.

3. Special Studies

Special studies represent the second major component of the monitoring program. Studies may be initiated in any year of the program. The ongoing data program will be highly instructive in selecting topics for special study to provide an in-depth examination on apparent differences between economic trends in the Pinelands and the Non-Pinelands. Special studies may also provide an opportunity to augment ongoing data collection should a need be identified for primary (rather than secondary) data or for more geographically-specific data. Studies from previous years are listed in Appendix B.

Continuing Study: Split Town Study

In 2012, the Pinelands Commission began a study on "split towns" to determine possible alternatives to the current methods of monitoring. A split town is a municipality whose land area straddles the Pinelands Area boundary; part of the municipality's land is within the Pinelands Area, and part is outside. Fifty-three municipalities have borders within the Pinelands Area. Of those, only 11 are *completely* contained by the Pinelands Area. The remaining municipalities that straddle the boundary are considered split towns.

The current method of evaluating split towns is dependent upon land area. Those municipalities that have at least 10% of their land area within the Pinelands Area are considered to be Pinelands municipalities and their statistical data is included in the Commission's studies, including the annual Long-Term Economic Monitoring Report. This can create problems in producing representative reports as data can be skewed if a municipality has a higher concentration of development and/or residents outside the Pinelands boundary. For example, 20% of Eagleswood is located within the Pinelands Area boundary, yet all of its residents are located outside the boundary. Beachwood has 28% of its land area within the Pinelands Area and has a population of more than 11,000, yet only four of its residents are actually located inside the Pinelands.

In an effort to reduce the effects of skewed results, an analysis was carried out to determine if a larger land area should be used for deciding whether a municipality is in the Pinelands or not. Analysis has shown that simply altering the 10% rule in favor of a 20%, 25%, or even 30% rule yields no significant difference in the value of the aggregates. As a result, other methods of obtaining sub-municipal data will be explored. One possible method is through the use of a geographic information system where it may be possible to attribute certain data to relatively precise geographic locations, thereby allowing the Commission to more accurately attribute data within those municipalities split by the Pinelands Area boundary than would otherwise have been possible using the 10% rule. Doing so would enable the Commission to more accurately evaluate the impact of its policies upon those areas within the Pinelands and to better compare portions of southern New Jersey within the Pinelands to those outside. The Commission intends to examine only a select number of core variables as part of this special study. It is hoped that the results of this study will buttress the Commission's use of the 10% rule, revise it, or eschew it in favor of more precise methods.

For the 2013 iteration of the report, the Commission purchased the Business Analyst extension for ESRI's ArcGIS Desktop software. Use of the purchased data proved to be helpful in gaining more accurate Pinelands Area data. In the *2014 Annual Report*, point data was acquired from the New Jersey Department of Treasury's Division of Taxation for two of the three Real Estate variables: residential transactions and selling prices. Additionally, the supplemental variable added to the *2014 Annual Report* uses data at the census block level.

Continuing Study: Indicators of Municipal Health

At its September 1999 meeting, the Pinelands Municipal Council unanimously recommended that the Long-Term Economic Monitoring Program conduct a special project to identify and characterize

municipalities experiencing poor health. Although difficult to define, poor municipal health can generally be described as being below a given standard with respect to municipalities' social, economic, physical, and fiscal conditions. The project was administered by Pinelands Commission staff and conducted in consultation with the Pinelands Municipal Council.

In November 1999, the Pinelands Commission authorized the project as the second special study. The goals of the project are to: 1) produce a database of indicators that are reflective of municipalities' social, economic, physical, and fiscal conditions; 2) produce an objective, systematic and repeatable model that identifies municipalities that are experiencing poor health using the database of indicators; 3) select economically challenged communities using the results from the model; and 4) develop methods to calculate financial aid and/or other resources that may alleviate the degree of strain in the identified municipalities.

In January 2001, a short questionnaire was administered to municipal officials (i.e., mayors, CFO's, administrators, council members, etc.) of 36 municipalities.⁹ The questionnaire was designed to reveal municipal officials' opinions on indicators of fiscal health and on ways to measure and compare fiscal health among municipalities. In general, the results of the questionnaire suggest that the most pressing municipal health concerns of the Pinelands municipalities relate to a healthy tax base (i.e., a mix of commercial, industrial, and residential land), tax rates, and school costs. These themes are being examined more closely during the course of this project.

The preliminary design of the study consists of two parts. The first part focuses on an analysis of fiscal indicators in the Pinelands and the Non-Pinelands. Based on responses from the questionnaires and the availability of data, a number of variables were examined, including unemployment rates, tax rates, income levels, and the level of commercial and industrial ratables. The second part of the study identifies those towns in the Pinelands that are most in need of fiscal assistance, and will design a corresponding funding model.

After peer review, a final draft for this study was presented to the Public and Governmental Programs Committee of the Pinelands Commission in July 2008. The report was then distributed to state agencies for comment; however no comments have been received. A copy of this document is available for public review on the Pinelands Commission's web site. The final model to measure fiscal stress will use principal components analysis to arrive at a single fiscal stress number for all 566 municipalities in New Jersey. Principal components analysis is an objective, statistical approach that combines several different variables into a single measurement (in this case, overall fiscal health). This method has been legally challenged and upheld in New Jersey courts and is the basis upon which the New Jersey Department of Education assigns district factor groups that are used in state testing analysis. Preliminary findings show that the most severely stressed municipalities in the Pinelands region rank among the top 10% of municipalities statewide in regards to fiscal stress.

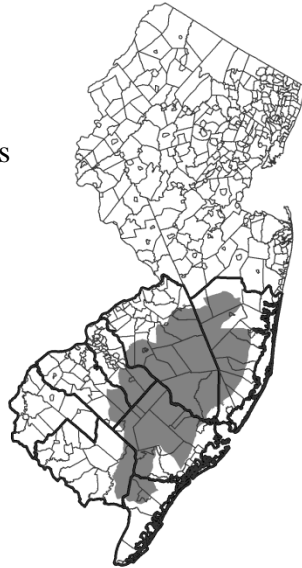
It is anticipated that the findings from this study may act as a guideline for more efficiently channeling state aid to those municipalities that may have been shortchanged in the past. It can, and has been used, as a guide to provide different Comprehensive Management Plan standards for distressed municipalities in rulemaking. The study may be revisited to update, expand upon, or retool the methods involved.

⁹ All municipalities with at least 50% of their land within the Pinelands were included (33 municipalities) plus three additional municipalities which requested to be included.

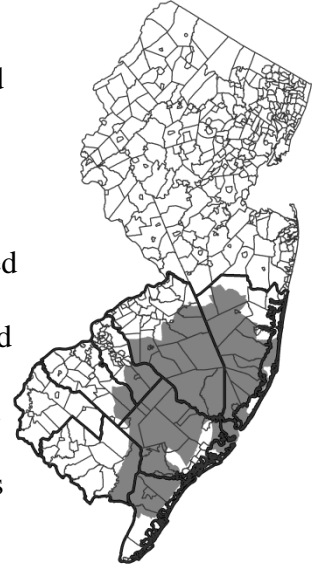
4. LTEM Annual Report of Indicators

Geographic Definitions

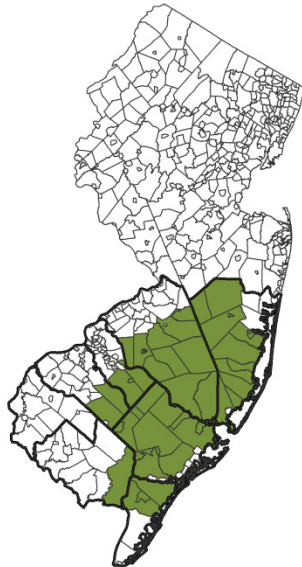
State-Designated Pinelands Area: the area designated by The Pinelands Protection Act. This is the state-designated area under the jurisdiction of the Pinelands Commission.



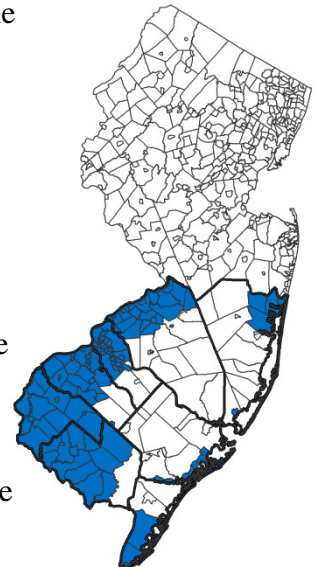
Pinelands National Reserve: the area designated by The National Parks and Recreation Act of 1978. This is the federally designated area that includes the state-designated area plus areas under CAFRA and DEP jurisdiction. This report focuses on the state-designated area only.



Pinelands: the 47 municipalities in southern New Jersey that have at least 10% of their land within the state-designated Pinelands Area.



Non-Pinelands: the remaining 155 municipalities in southern New Jersey that have less than 10% of their land in the state-designated Pinelands Area (6 municipalities have between 0.1% and 9% in the Pinelands, the remaining 149 have no land in the Pinelands).



Southern New Jersey: the Pinelands municipalities plus the Non-Pinelands municipalities (47 Pinelands municipalities + 155 Non-Pinelands municipalities = 202 municipalities total). Defined as the counties of Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, Ocean, and Salem.

State of New Jersey: this is the data for the state as a whole, including southern (202 municipalities) and northern (363 municipalities) New Jersey (565 municipalities, total).

P1 Municipal Population

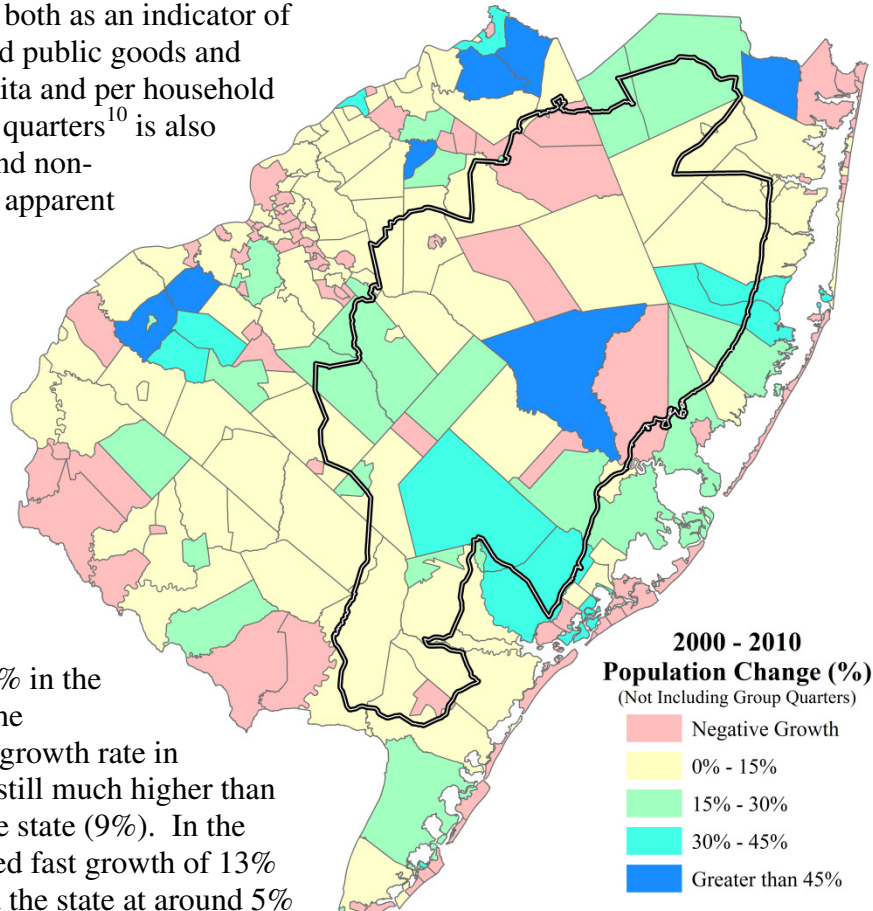
U.S. Census Bureau 1980, 1990, 2000, 2010
Last Updated for 2012 LTEM with 2010 data

The Pinelands population has grown more quickly than the both the Non-Pinelands and the state in every decade since 1980. As of the 2010 U.S. Census, the Pinelands municipalities have a population of 698,092.

Description: Population data is useful both as an indicator of demand for housing and for private and public goods and services, as well as for various per capita and per household calculations. The population in group quarters¹⁰ is also important as changes in institutional and non-institutional housing can influence the apparent overall population changes of a municipality.

Unit of Analysis: Population data is compiled at the municipal level and regionally aggregated to allow for inside/outside the Pinelands and state analysis.

Findings: Population in the Pinelands grew quickly in the 1980's, jumping about 30% over the decade. Elsewhere, population grew only by 7% in the Non-Pinelands and 5% in the state. The following decade showed a decreased growth rate in the Pinelands at 12%; however it was still much higher than that of the Non-Pinelands (7%) and the state (9%). In the 2000's, the Pinelands showed continued fast growth of 13% relative to both the Non-Pinelands and the state at around 5% and 4%, respectively. According to the U.S. Census, the 2010 Pinelands municipal aggregate population was 698,092 while the Non-Pinelands had a population of 1,723,949 and the state's population was 8,791,894. Over the 30-year period, the Pinelands grew by 65%. Comparatively, the Non-Pinelands grew by 21% and the state grew by 19% during the same period.



At the municipal level, Woodland Township grew by 53% from 2000 to 2010 (618 additional people). Egg Harbor Township saw the next highest percent growth, increasing by 41% and upping its population by 12,597. Barnegat Township was the only other municipality to grow by at least 30%. During the ten-year period, 38 municipalities saw growth, increasing their populations by an average of 14%. Of the municipalities that grew, 19 saw increases of less than 10% while only two of those grew by less than 1%.

¹⁰ Group quarters, classified as institutional and non-institutional, refers to housing where unrelated people live together. Examples of institutional group quarters include correctional facilities and mental health hospitals, while examples of non-institutional group quarters include college dorms and military barracks. These populations are typically not as mobile as the general population; for example, prison inmates have little to no say in where they are housed and military personnel can be transferred from base to base on an as needed basis. Because large fluctuations can occur in group quarters (prisoners being transferred to a new prison or deployment of military personnel) the changes in the general population can easily be hidden or appear to be skewed.

Population Change from 1980 to 2010

Region	1980	1990	2000	2010	Change 1980-1990	Change 1990-2000	Change 2000-2010	Change 1980-2010
Pinelands	423,465	549,521	615,984	698,092	30%	12%	13%	65%
Non-Pinelands	1,430,609	1,534,417	1,647,532	1,723,949	7%	7%	5%	21%
State	7,365,011	7,747,750	8,414,350	8,791,894	5%	9%	4%	19%

There were nine Pinelands municipalities that had negative growth from 2000 to 2010, with New Hanover Township seeing the greatest percent loss (down 24%). The next highest loss occurred in Woodbine Borough, where population declined by 9%. Dennis Township and Medford Lakes Borough were the only two municipalities to have losses of less than 1%. The average percent population loss was 6%.

In terms of group quarters, New Hanover Township's 2010 group quarters population is 77% of its total population; likely due to Joint Base McGuire-Dix-Lakehurst. Maurice River Township has the second highest group quarters population at 55% of its total population; mostly from correctional facilities.

The Pinelands gained an additional 1,156 people living in group quarters situations from 2000 to 2010. These additions were largely institutional as the non-institutional population in the Pinelands actually declined by 190 people. Most of the growth in group quarters occurred in correctional facilities and nursing facilities, with an addition of 1,342 people and 930 people, respectively. The population in military facilities has decreased by 1,044, while those in college dorms increased by 353. The group quarters population in the Non-Pinelands fell by 7,407 while the overall state group quarters fell by 7,945.

Changes in group quarters populations can mask the apparent population change in a municipality. For example, Woodland Township, which posted 53% total population growth in 2010 (618 people), experienced an increase of 474 people in group quarters; that is 77% of the municipality's 2010 census total population growth. Likewise, Washington Township shows an increase of 66 people from 2000 to 2010, but the group quarters population in Washington Township actually decreased by 166, thereby masking the non-group quarters increase in population of 232 people. Meanwhile, Maurice River Township's increase of 1,048 people can almost entirely be attributed to an increase in the institutional population (1,044).

Shifts between institutional and non-institutional group quarters also mask the changing landscape in some municipalities. In New Hanover Township, the number of people in non-institutions (mainly military bases) decreased by 904 people, while the number of people in institutions (prisons) increased by 489 people. Similarly, Berkeley Township lost 355 people in non-institutional group quarters, but gained 349 people in institutional residents. Manchester Township, seeing a similar shift, lost 122 non-institutional residents, but gained 169 institutional residents. Conversely, Woodbine Borough saw an opposite shift, with a gain of 486 in non-institutional residents, but a loss of 561 in institutional residents.

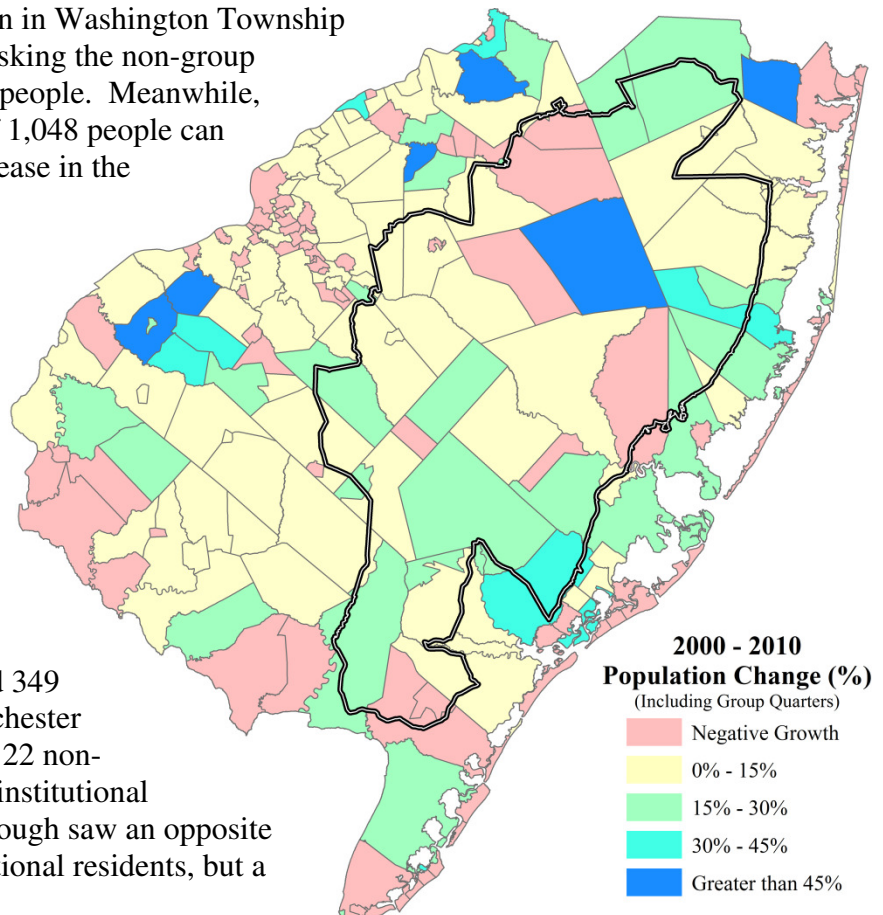


Table P1a

2010 Census Population by Pinelands Municipality

Municipality	County	1980	1990	2000	2010	Change 2000 - 2010	% Change 2000 - 2010	% Change 1980 - 2010
Woodland Township	Burlington	2,285	2,063	1,170	1,788	618	53%	-22%
Egg Harbor Township	Atlantic	19,381	24,544	30,726	43,323	12,597	41%	124%
Barnegat Township	Ocean	8,702	12,235	15,270	20,936	5,666	37%	141%
Hamilton Township	Atlantic	9,499	16,012	20,499	26,503	6,004	29%	179%
Ocean Township	Ocean	3,731	5,416	6,450	8,332	1,882	29%	123%
Jackson Township	Ocean	25,644	33,233	42,816	54,856	12,040	28%	114%
Little Egg Harbor Township	Ocean	8,483	13,333	15,945	20,065	4,120	26%	137%
Monroe Township	Gloucester	21,639	26,703	28,967	36,129	7,162	25%	67%
Weymouth Township	Atlantic	1,260	1,957	2,257	2,715	458	20%	115%
Galloway Township	Atlantic	12,176	23,330	31,209	37,349	6,140	20%	207%
Buena Borough	Atlantic	3,642	4,441	3,873	4,603	730	19%	26%
Stafford Township	Ocean	10,385	13,325	22,532	26,535	4,003	18%	156%
Hammonton Town	Atlantic	12,298	12,208	12,604	14,791	2,187	17%	20%
Plumsted Township	Ocean	4,674	6,005	7,275	8,421	1,146	16%	80%
Maurice River Township	Cumberland	4,577	6,648	6,928	7,976	1,048	15%	74%
Winslow Township	Camden	20,034	30,087	34,611	39,499	4,888	14%	97%
Eagleswood Township	Ocean	1,009	1,476	1,441	1,603	162	11%	59%
Manchester Township	Ocean	27,987	35,976	38,928	43,070	4,142	11%	54%
Washington Township	Burlington	808	805	621	687	66	11%	-15%
Estell Manor City	Atlantic	848	1,404	1,585	1,735	150	9%	105%
Lacey Township	Ocean	14,161	22,141	25,346	27,644	2,298	9%	95%
Franklin Township	Gloucester	12,396	14,482	15,466	16,820	1,354	9%	36%
Evesham Township	Burlington	21,508	35,309	42,275	45,538	3,263	8%	112%
Port Republic City	Atlantic	837	992	1,037	1,115	78	8%	33%
Chesilhurst Borough	Camden	1,590	1,526	1,520	1,634	114	8%	3%
Wrightstown Borough	Burlington	3,031	3,843	748	802	54	7%	-74%
Beachwood Borough	Ocean	7,687	9,324	10,375	11,045	670	6%	44%
Lakehurst Borough	Ocean	2,908	3,078	2,522	2,654	132	5%	-9%
Mullica Township	Atlantic	5,243	5,896	5,912	6,147	235	4%	17%
Medford Township	Burlington	17,622	20,526	22,253	23,033	780	4%	31%
Berkeley Township	Ocean	23,151	37,319	39,991	41,255	1,264	3%	78%
Upper Township	Cape May	6,713	10,681	12,115	12,373	258	2%	84%
Buena Vista Township	Atlantic	6,959	7,655	7,436	7,570	134	2%	9%
Waterford Township	Camden	8,126	10,940	10,494	10,649	155	1%	31%
South Toms River Borough	Ocean	3,954	3,869	3,634	3,684	50	1%	-7%
Berlin Township	Camden	5,348	5,466	5,290	5,357	67	1%	0%
Southampton Township	Burlington	8,808	10,202	10,388	10,464	76	1%	19%
Shamong Township	Burlington	4,537	5,765	6,462	6,490	28	0%	43%
Dennis Township	Cape May	3,989	5,574	6,492	6,467	-25	0%	62%
Medford Lakes Borough	Burlington	4,958	4,462	4,173	4,146	-27	-1%	-16%
Pemberton Township	Burlington	29,720	31,342	28,691	27,912	-779	-3%	-6%
Tabernacle Township	Burlington	6,236	7,360	7,170	6,949	-221	-3%	11%
Folsom Borough	Atlantic	1,892	2,181	1,972	1,885	-87	-4%	0%
Bass River Township	Burlington	1,344	1,580	1,510	1,443	-67	-4%	7%
Egg Harbor City	Atlantic	4,618	4,583	4,545	4,243	-302	-7%	-8%
Woodbine Borough	Cape May	2,809	2,678	2,716	2,472	-244	-9%	-12%
New Hanover Township	Burlington	14,258	9,546	9,744	7,385	-2,359	-24%	-48%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>								
Berlin Borough	Camden	5,786	5,672	6,149	7,588	1,439	23%	31%
Vineland City	Cumberland	53,753	54,780	56,271	60,724	4,453	8%	13%
Springfield Township	Burlington	2,691	3,028	3,227	3,414	187	6%	27%
Corbin City	Atlantic	254	412	468	492	24	5%	94%
North Hanover Township	Burlington	9,050	9,994	7,347	7,678	331	5%	-15%
Toms River Township	Ocean	64,455	76,371	89,706	91,239	1,533	2%	42%

Table P1b

2010 Census Group Quarters Population

Municipality	County	Group Quarters Pop.	% of Pop. In Group Quarters	Institution Pop.	% of Pop. In GQ Institution	Non-Institution Pop.	% of Pop. In GQ Non-Institution
New Hanover Township	Burlington	5,685	77%	5,325	72%	360	5%
Maurice River Township	Cumberland	4,405	55%	4,405	55%	-	-
Woodland Township	Burlington	474	27%	54	3%	420	23%
Woodbine Borough	Cape May	496	20%	9	< 1%	487	20%
Galloway Township	Atlantic	2,818	8%	401	1%	2,417	6%
Chesilhurst Borough	Camden	108	7%	49	3%	59	4%
Hamilton Township	Atlantic	1,120	4%	982	4%	138	1%
Winslow Township	Camden	962	2%	839	2%	123	< 1%
Hammonton Town	Atlantic	306	2%	167	1%	139	1%
Washington Township	Burlington	14	2%	14	2%	-	-
Dennis Township	Cape May	120	2%	103	2%	17	< 1%
Manchester Township	Ocean	775	2%	674	2%	101	< 1%
Pemberton Township	Burlington	485	2%	417	1%	68	< 1%
Waterford Township	Camden	170	2%	4	< 1%	166	2%
Mullica Township	Atlantic	87	1%	-	-	87	1%
Berkeley Township	Ocean	582	1%	568	1%	14	< 1%
Little Egg Harbor Township	Ocean	269	1%	269	1%	-	-
Medford Township	Burlington	220	1%	177	1%	43	< 1%
Evesham Township	Burlington	376	1%	136	< 1%	240	1%
Jackson Township	Ocean	432	1%	420	1%	12	< 1%
Egg Harbor City	Atlantic	33	1%	20	< 1%	13	< 1%
Stafford Township	Ocean	180	1%	176	1%	4	< 1%
Port Republic City	Atlantic	7	1%	-	-	7	1%
Barneget Township	Ocean	118	1%	109	1%	9	< 1%
Monroe Township	Gloucester	195	1%	151	< 1%	44	< 1%
Estell Manor City	Atlantic	8	< 1%	8	< 1%	-	-
Buena Borough	Atlantic	19	< 1%	-	-	19	< 1%
Franklin Township	Gloucester	51	< 1%	-	-	51	< 1%
Folsom Borough	Atlantic	5	< 1%	-	-	5	< 1%
Weymouth Township	Atlantic	7	< 1%	-	-	7	< 1%
Buena Vista Township	Atlantic	18	< 1%	-	-	18	< 1%
Berlin Township	Camden	12	< 1%	-	-	12	< 1%
Shamong Township	Burlington	14	< 1%	13	< 1%	1	< 1%
Lacey Township	Ocean	50	< 1%	26	< 1%	24	< 1%
Beachwood Borough	Ocean	14	< 1%	-	-	14	< 1%
Tabernacle Township	Burlington	6	< 1%	-	-	6	< 1%
Upper Township	Cape May	10	< 1%	-	-	10	< 1%
Plumsted Township	Ocean	6	< 1%	-	-	6	< 1%
Ocean Township	Ocean	4	< 1%	-	-	4	< 1%
Egg Harbor Township	Atlantic	19	< 1%	-	-	19	< 1%
Bass River Township	Burlington	-	-	-	-	-	-
Medford Lakes Borough	Burlington	-	-	-	-	-	-
Southampton Township	Burlington	-	-	-	-	-	-
Wrightstown Borough	Burlington	-	-	-	-	-	-
Eagleswood Township	Ocean	-	-	-	-	-	-
Lakehurst Borough	Ocean	-	-	-	-	-	-
South Toms River Borough	Ocean	-	-	-	-	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Vineland City	Cumberland	1,491	2%	897	1%	594	1%
Berlin Borough	Camden	139	2%	126	2%	13	< 1%
Toms River Township	Ocean	1,439	2%	1,343	1%	96	< 1%
Springfield Township	Burlington	6	< 1%	-	-	6	< 1%
Corbin City	Atlantic	-	-	-	-	-	-
North Hanover Township	Burlington	-	-	-	-	-	-

Table P1c 2000 to 2010 Group Quarters Components of Population Change

Municipality	County	2000 GQ Pop	2010 GQ Pop	2000 - 2010 GQ Change	2000 Inst Pop	2010 Inst Pop	2000 - 2010 Inst Change	2000 Non- Inst Pop	2010 Non- Inst Pop	2000 - 2010 Non-Inst Change
Maurice River Township	Cumberland	3,361	4,405	1,044	3,361	4,405	1,044	-	-	-
Galloway Township	Atlantic	2,102	2,818	716	32	401	369	2,070	2,417	347
Woodland Township	Burlington	-	474	474	-	54	54	-	420	420
Evesham Township	Burlington	183	376	193	114	136	22	69	240	171
Little Egg Harbor Township	Ocean	170	269	99	170	269	99	-	-	-
Hamilton Township	Atlantic	1,039	1,120	81	1,026	982	-44	13	138	125
Jackson Township	Ocean	380	432	52	365	420	55	15	12	-3
Manchester Township	Ocean	728	775	47	505	674	169	223	101	-122
Mullica Township	Atlantic	48	87	39	-	-	-	48	87	39
Shamong Township	Burlington	2	14	12	-	13	13	2	1	-1
Lacey Township	Ocean	38	50	12	24	26	2	14	24	10
Beachwood Borough	Ocean	6	14	8	-	-	-	6	14	8
Upper Township	Cape May	8	10	2	-	-	-	8	10	2
Port Republic City	Atlantic	6	7	1	-	-	-	6	7	1
Weymouth Township	Atlantic	6	7	1	-	-	-	6	7	1
Bass River Township	Burlington	-	-	-	-	-	-	-	-	-
Medford Lakes Borough	Burlington	-	-	-	-	-	-	-	-	-
Eagleswood Township	Ocean	-	-	-	-	-	-	-	-	-
Lakehurst Borough	Ocean	-	-	-	-	-	-	-	-	-
South Toms River Borough	Ocean	-	-	-	-	-	-	-	-	-
Folsom Borough	Atlantic	7	5	-2	-	-	-	7	5	-2
Plumsted Township	Ocean	8	6	-2	-	-	-	8	6	-2
Berkeley Township	Ocean	588	582	-6	219	568	349	369	14	-355
Berlin Township	Camden	19	12	-7	-	-	-	19	12	-7
Barneget Township	Ocean	127	118	-9	123	109	-14	4	9	5
Wrightstown Borough	Burlington	10	-	-10	-	-	-	10	-	-10
Buena Borough	Atlantic	33	19	-14	-	-	-	33	19	-14
Monroe Township	Gloucester	212	195	-17	146	151	5	66	44	-22
Estell Manor City	Atlantic	27	8	-19	27	8	-19	-	-	-
Pemberton Township	Burlington	509	485	-24	433	417	-16	76	68	-8
Egg Harbor Township	Atlantic	47	19	-28	-	-	-	47	19	-28
Chesilhurst Borough	Camden	137	108	-29	104	49	-55	33	59	26
Medford Township	Burlington	250	220	-30	190	177	-13	60	43	-17
Egg Harbor City	Atlantic	70	33	-37	31	20	-11	39	13	-26
Waterford Township	Camden	209	170	-39	-	4	4	209	166	-43
Franklin Township	Gloucester	90	51	-39	-	-	-	90	51	-39
Hammonton Town	Atlantic	347	306	-41	225	167	-58	122	139	17
Ocean Township	Ocean	54	4	-50	-	-	-	54	4	-50
Southampton Township	Burlington	58	-	-58	58	-	-58	-	-	-
Tabernacle Township	Burlington	72	6	-66	67	-	-67	5	6	1
Woodbine Borough	Cape May	571	496	-75	570	9	-561	1	487	486
Buena Vista Township	Atlantic	94	18	-76	-	-	-	94	18	-76
Dennis Township	Cape May	208	120	-88	153	103	-50	55	17	-38
Stafford Township	Ocean	293	180	-113	223	176	-47	70	4	-66
Winslow Township	Camden	1,127	962	-165	1,032	839	-193	95	123	28
Washington Township	Burlington	180	14	-166	136	14	-122	44	-	-44
New Hanover Township	Burlington	6,100	5,685	-415	4,836	5,325	489	1,264	360	-904
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>										
Berlin Borough	Camden	72	139	67	33	126	93	39	13	-26
Corbin City	Atlantic	-	-	-	-	-	-	-	-	-
North Hanover Township	Burlington	-	-	-	-	-	-	-	-	-
Springfield Township	Burlington	7	6	-1	-	-	-	7	6	-1
Toms River Township	Ocean	1,937	1,439	-498	1,735	1,343	-392	202	96	-106
Vineland City	Cumberland	2,402	1,491	-911	1,052	897	-155	1,350	594	-756

P2 Census Block Population

U.S. Census Bureau 1990, 2000, 2010
Last Updated for 2012 LTEM with 2010 data

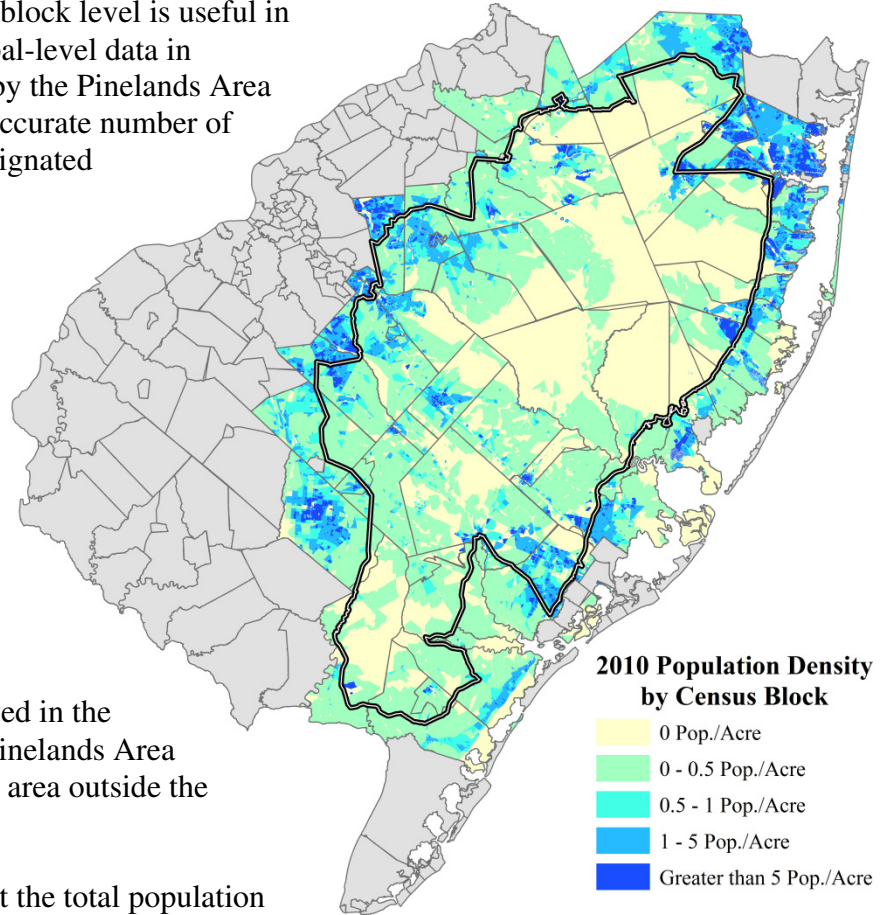
Most of the population growth occurring in Pinelands municipalities was occurring outside of the Pinelands Area boundary. From 1990 to 2010, the areas outside the Pinelands Area grew by 27%, while the areas inside only grew by 19%.

Description: Population at the census block level is useful in overcoming the limitations of municipal-level data in municipalities whose border are split by the Pinelands Area boundary. With block-level data, an accurate number of residents who live within the state-designated Pinelands Area can be calculated.

Unit of Analysis: Sub-municipal data is regionally aggregated by counting the population of census blocks inside and outside the Pinelands Area boundary using a geographic information system. The actual population of the state-designated Pinelands Area is calculated, along with areas of Pinelands municipalities that are outside of the boundary.¹¹

Findings: In 1990, 262,507 people lived in the Pinelands Area. Ten years later, the Pinelands Area population grew by only 5% while the area outside the boundary grew by 15%.

The 2010 census block data shows that the total population of the 53 municipalities with any amount of land in the Pinelands reached 869,227. Of that total amount, 64% were living outside the Pinelands boundary. Population data analyzed at the census block level revealed that 312,869 people lived in the state-designated Pinelands Area in 2010; a 13% increase over the 2000 population of 276,898. The number of persons living in Pinelands municipalities outside of the Pinelands Area boundary increased from 502,254 in 2000 to 556,358 in 2010; an increase of 11%. While the recent ten-year growth inside the boundary has outpaced that of the outside area, the total 1990 to 2010 population change has largely occurred outside the Pinelands Area (27%), while the areas inside only grew by 19%.



¹¹ The U.S. Census Bureau uses geographic units based political boundaries, natural features, and, sometimes, are arbitrary. In New Jersey, census blocks adhere to county boundaries, however they do not always adhere to county subdivisions (municipal) boundaries. Therefore, census blocks, as used in this report, are assigned a municipality based on its geographic center *inside* the polygon. This differs from the 2013 Long-Term Economic Monitoring Report where geographic center that did not adhere to block boundaries were used. This, coupled with periodic revisions by the U.S. Census Bureau may account for minor inconsistencies between Annual Reports.

Pinelands Municipal Census Block Population

In/Out	1990	2000	2010	Change 1990 - 2000	Change 2000 - 2010	Change 1990 - 2010
In Boundary	262,507	276,898	312,869	5%	13%	19%
Out Boundary	437,380	502,254	556,358	15%	11%	27%

A noticeable change over the previous census is the movement of Egg Harbor Township from the fourth most populated municipality in the Pinelands in 2000 to the first most populated, dropping Medford Township to the fourth position. Pemberton Township and Hamilton Township continue to be among the three most populated municipalities in the Pinelands.

Of the 53 municipalities with any amount of land in the Pinelands Area, the 10 municipalities with the most population in the Pinelands boundary account for 61% of the Pinelands total population, while the 20 most populated municipalities account for 86% of the population. The 10 most populous Pinelands municipalities each contain at least one of the Pinelands development areas: Regional Growth Areas, Pinelands Towns, and Pinelands Villages. Conversely, the 10 municipalities with the least population in the Pinelands comprise less than 0.2% of the total Pinelands population, however five of those municipalities are defined as part of the “Non-Pinelands” (less than 10% of their land is within the Pinelands Area). Additionally (and as found in previous findings), Eagleswood Township and Beachwood Borough have little to no population located within the Pinelands despite having 20% and 28% of their land area within the Pinelands Area boundaries, respectively.

The largest percent changes (over 30% growth) in population inside the Pinelands boundary between 2000 and 2010 occurred in four municipalities that have Regional Growth Areas, plus two with only Villages and/or institutional uses (Little Egg Harbor Township and Woodland Township). Barnegat Township, Egg Harbor Township, Galloway Township and Hamilton Township each contain a Regional Growth Area, with Barnegat Township being the fastest growing in terms of percent change (121%). Wrightstown Borough, New Hanover Township, Corbin City, and Beachwood Borough had the largest percentage decreases in population, but New Hanover Township had the largest absolute decrease (-2,417), possibly due to military base reductions.

Pinelands Municipal Population Change Summary

Description	# Municipalities	% of Total
Gained Inside, Gained Outside	19	36%
Gained Inside, Lost Outside	4	8%
Gained Inside, No Area Outside	7	13%
No Change Inside, Gained Outside	4	8%
Lost Inside, Gained Outside	13	25%
Lost Inside, Lost Outside	2	4%
Lost Inside, No Area Outside.	4	8%

All 53 municipalities with some or all of their land inside the Pinelands were classified according to where their population gain occurred. Municipalities that gained population both inside and outside the boundary accounted for 36% of the total municipalities, the largest category by far. The second highest category was those municipalities that lost population inside of the boundary, but gained outside (25% or 13 municipalities) of the boundary. Pemberton Township and Bass River Township are the only municipalities categorized as “lost inside, lost outside.”

Table P2a 2010 Census Population Inside and Outside the Pinelands Area

Municipality	County	% Land Area in Pinelands Area	Population Inside Pinelands Area	Population Outside Pinelands Area	% Population Inside Pinelands Area
Egg Harbor Township	Atlantic	38%	27,556	15,767	64%
Pemberton Township	Burlington	90%	27,394	518	98%
Hamilton Township	Atlantic	97%	24,954	1,549	94%
Medford Township	Burlington	75%	18,861	4,172	82%
Monroe Township	Gloucester	69%	17,871	18,258	49%
Winslow Township	Camden	81%	17,813	21,686	45%
Stafford Township	Ocean	39%	15,678	10,857	59%
Galloway Township	Atlantic	38%	14,947	22,402	40%
Hammonton Town	Atlantic	100%	14,791	-	100%
Manchester Township	Ocean	72%	12,137	30,933	28%
Evesham Township	Burlington	55%	11,860	33,678	26%
Waterford Township	Camden	100%	10,649	-	100%
Southampton Township	Burlington	73%	7,295	3,169	70%
Barnegat Township	Ocean	56%	7,225	13,711	35%
Tabernacle Township	Burlington	100%	6,949	-	100%
New Hanover Township	Burlington	91%	6,692	693	91%
Shamong Township	Burlington	100%	6,490	-	100%
Buena Vista Township	Atlantic	90%	6,316	1,254	83%
Mullica Township	Atlantic	100%	6,147	-	100%
Maurice River Township	Cumberland	69%	5,897	2,079	74%
Jackson Township	Ocean	47%	4,832	50,024	9%
Egg Harbor City	Atlantic	100%	4,243	-	100%
Medford Lakes Borough	Burlington	100%	4,146	-	100%
Franklin Township	Gloucester	36%	2,616	14,204	16%
South Toms River Borough	Ocean	48%	2,586	1,098	70%
Lakehurst Borough	Ocean	87%	2,535	119	96%
Woodbine Borough	Cape May	95%	2,465	7	100%
Berkeley Township	Ocean	30%	2,112	39,143	5%
Weymouth Township	Atlantic	82%	2,086	629	77%
Folsom Borough	Atlantic	100%	1,885	-	100%
Woodland Township	Burlington	100%	1,788	-	100%
Chesilhurst Borough	Camden	100%	1,634	-	100%
Estell Manor City	Atlantic	72%	1,624	111	94%
Dennis Township	Cape May	38%	1,570	4,897	24%
Upper Township	Cape May	33%	1,306	11,067	11%
Bass River Township	Burlington	87%	1,172	271	81%
Buena Borough	Atlantic	47%	1,030	3,573	22%
Washington Township	Burlington	100%	687	-	100%
Lacey Township	Ocean	67%	550	27,094	2%
Plumsted Township	Ocean	53%	451	7,970	5%
Berlin Township	Camden	16%	303	5,054	6%
Little Egg Harbor Township	Ocean	23%	203	19,862	1%
Ocean Township	Ocean	41%	142	8,190	2%
Port Republic City	Atlantic	35%	88	1,027	8%
Wrightstown Borough	Burlington	73%	81	721	10%
Beachwood Borough	Ocean	28%	2	11,043	< 1%
Eagleswood Township	Ocean	20%	0	1,603	0%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>					
North Hanover Township	Burlington	4%	2,973	4,705	39%
Vineland City	Cumberland	7%	156	60,568	< 1%
Berlin Borough	Camden	10%	76	7,512	1%
Corbin City	Atlantic	1%	5	487	1%
Toms River Township	Ocean	< 1%	0	91,239	0%
Springfield Township	Burlington	2%	0	3,414	0%

Table P2b

2000 to 2010 Population Change Inside the Pinelands Area

Municipality	County	% Land in Pinelands Area	2000 Pop Inside	2010 Pop Inside	Total Change Inside	% Change Inside
Barneget Township	Ocean	56%	3,273	7,225	3,952	121%
Egg Harbor Township	Atlantic	38%	16,211	27,556	11,345	70%
Little Egg Harbor Township	Ocean	23%	127	203	76	60%
Woodland Township	Burlington	100%	1,170	1,788	618	53%
Galloway Township	Atlantic	38%	10,915	14,947	4,032	37%
Hamilton Township	Atlantic	97%	19,136	24,954	5,818	30%
Weymouth Township	Atlantic	82%	1,657	2,086	429	26%
Monroe Township	Gloucester	69%	14,406	17,871	3,465	24%
Maurice River Township	Cumberland	69%	4,819	5,897	1,078	22%
Buena Borough	Atlantic	47%	865	1,030	165	19%
Jackson Township	Ocean	47%	4,106	4,832	726	18%
Hammonton Town	Atlantic	100%	12,604	14,791	2,187	17%
Stafford Township	Ocean	39%	13,390	15,678	2,288	17%
Winslow Township	Camden	81%	15,599	17,813	2,214	14%
Upper Township	Cape May	33%	1,175	1,306	131	11%
Washington Township	Burlington	100%	621	687	66	11%
Plumsted Township	Ocean	53%	412	451	39	9%
Chesilhurst Borough	Camden	100%	1,520	1,634	114	8%
Estell Manor City	Atlantic	72%	1,513	1,624	111	7%
Lakehurst Borough	Ocean	87%	2,393	2,535	142	6%
Lacey Township	Ocean	67%	521	550	29	6%
Mullica Township	Atlantic	100%	5,912	6,147	235	4%
South Toms River Borough	Ocean	48%	2,495	2,586	91	4%
Medford Township	Burlington	75%	18,202	18,861	659	4%
Evesham Township	Burlington	55%	11,553	11,860	307	3%
Berlin Township	Camden	16%	298	303	5	2%
Waterford Township	Camden	100%	10,494	10,649	155	1%
Southampton Township	Burlington	73%	7,193	7,295	102	1%
Buena Vista Township	Atlantic	90%	6,248	6,316	68	1%
Shamong Township	Burlington	100%	6,462	6,490	28	< 1%
Eagleswood Township	Ocean	20%	0	0	0	0%
Manchester Township	Ocean	72%	12,160	12,137	-23	< -1%
Medford Lakes Borough	Burlington	100%	4,173	4,146	-27	-1%
Franklin Township	Gloucester	36%	2,664	2,616	-48	-2%
Ocean Township	Ocean	41%	145	142	-3	-2%
Pemberton Township	Burlington	90%	28,127	27,394	-733	-3%
Tabernacle Township	Burlington	100%	7,170	6,949	-221	-3%
Dennis Township	Cape May	38%	1,626	1,570	-56	-3%
Folsom Borough	Atlantic	100%	1,972	1,885	-87	-4%
Bass River Township	Burlington	87%	1,234	1,172	-62	-5%
Egg Harbor City	Atlantic	100%	4,545	4,243	-302	-7%
Woodbine Borough	Cape May	95%	2,710	2,465	-245	-9%
Berkeley Township	Ocean	30%	2,391	2,112	-279	-12%
Port Republic City	Atlantic	35%	103	88	-15	-15%
Wrightstown Borough	Burlington	73%	98	81	-17	-17%
New Hanover Township	Burlington	91%	9,109	6,692	-2,417	-27%
Beachwood Borough	Ocean	28%	4	2	-2	-50%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Toms River Township	Ocean	< 1%	0	0	0	0%
Springfield Township	Burlington	2%	0	0	0	0%
Berlin Borough	Camden	10%	76	76	0	0%
North Hanover Township	Burlington	4%	3,108	2,973	-135	-4%
Vineland City	Cumberland	7%	186	156	-30	-16%
Corbin City	Atlantic	1%	7	5	-2	-29%

Table P2c 2000 to 2010 Population Change Outside the Pinelands Area

Municipality	County	% Land in Pinelands Area	2000 Pop Outside	2010 Pop Outside	Total Change Outside	% Change Outside
Estell Manor City	Atlantic	72%	72	111	39	54%
Ocean Township	Ocean	41%	6,305	8,190	1,885	30%
Jackson Township	Ocean	47%	38,710	50,024	11,314	29%
Little Egg Harbor Township	Ocean	23%	15,818	19,862	4,044	26%
Monroe Township	Gloucester	69%	14,561	18,258	3,697	25%
Buena Borough	Atlantic	47%	3,008	3,573	565	19%
Stafford Township	Ocean	39%	9,142	10,857	1,715	19%
Woodbine Borough	Cape May	95%	6	7	1	17%
Plumsted Township	Ocean	53%	6,863	7,970	1,107	16%
Manchester Township	Ocean	72%	26,768	30,933	4,165	16%
Barneгат Township	Ocean	56%	11,997	13,711	1,714	14%
Winslow Township	Camden	81%	19,012	21,686	2,674	14%
Hamilton Township	Atlantic	97%	1,363	1,549	186	14%
Eagleswood Township	Ocean	20%	1,441	1,603	162	11%
Franklin Township	Gloucester	36%	12,802	14,204	1,402	11%
Wrightstown Borough	Burlington	73%	650	721	71	11%
Galloway Township	Atlantic	38%	20,294	22,402	2,108	10%
Port Republic City	Atlantic	35%	934	1,027	93	10%
Evesham Township	Burlington	55%	30,722	33,678	2,956	10%
Lacey Township	Ocean	67%	24,825	27,094	2,269	9%
New Hanover Township	Burlington	91%	635	693	58	9%
Egg Harbor Township	Atlantic	38%	14,515	15,767	1,252	9%
Beachwood Borough	Ocean	28%	10,371	11,043	672	6%
Buena Vista Township	Atlantic	90%	1,188	1,254	66	6%
Weymouth Township	Atlantic	82%	600	629	29	5%
Berkeley Township	Ocean	30%	37,600	39,143	1,543	4%
Medford Township	Burlington	75%	4,051	4,172	121	3%
Berlin Township	Camden	16%	4,992	5,054	62	1%
Upper Township	Cape May	33%	10,940	11,067	127	1%
Dennis Township	Cape May	38%	4,866	4,897	31	1%
Hammonton Town	Atlantic	100%	-	-	-	-
Waterford Township	Camden	100%	-	-	-	-
Tabernacle Township	Burlington	100%	-	-	-	-
Shamong Township	Burlington	100%	-	-	-	-
Mullica Township	Atlantic	100%	-	-	-	-
Egg Harbor City	Atlantic	100%	-	-	-	-
Medford Lakes Borough	Burlington	100%	-	-	-	-
Folsom Borough	Atlantic	100%	-	-	-	-
Woodland Township	Burlington	100%	-	-	-	-
Chesilhurst Borough	Camden	100%	-	-	-	-
Washington Township	Burlington	100%	-	-	-	-
Southampton Township	Burlington	73%	3,195	3,169	-26	-1%
Maurice River Township	Cumberland	69%	2,109	2,079	-30	-1%
Bass River Township	Burlington	87%	276	271	-5	-2%
South Toms River Borough	Ocean	48%	1,139	1,098	-41	-4%
Lakehurst Borough	Ocean	87%	129	119	-10	-8%
Pemberton Township	Burlington	90%	564	518	-46	-8%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Berlin Borough	Camden	10%	6,073	7,512	1,439	24%
North Hanover Township	Burlington	4%	4,239	4,705	466	11%
Vineland City	Cumberland	7%	56,085	60,568	4,483	8%
Springfield Township	Burlington	2%	3,227	3,414	187	6%
Corbin City	Atlantic	1%	461	487	26	6%
Toms River Township	Ocean	< 1%	89,706	91,239	1,533	2%

P3 Age Demographics

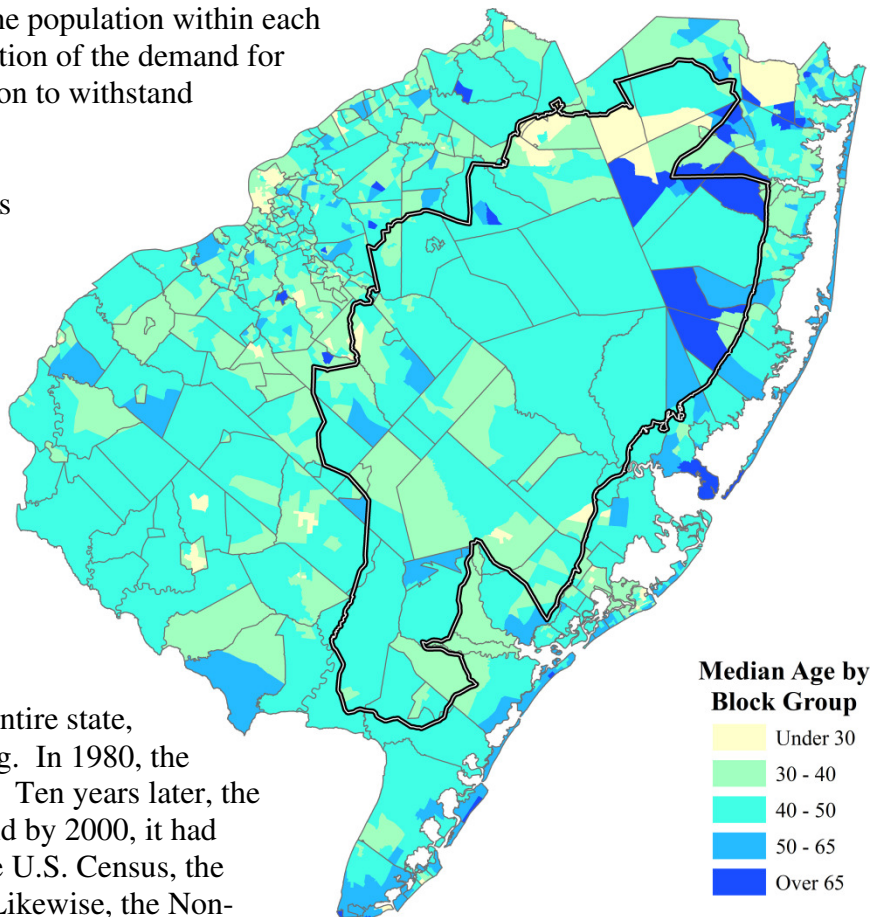
U.S. Census Bureau 1980, 1990, 2000, 2010/ESRI Data 2012
Last Updated for 2013 LTEM with 2012 data

Populations in the Pinelands, the Non-Pinelands, and the state continue to age as the baby boom generation reaches retirement ages. The 2012 average median age was 42 years old in all three regions.

Description: The age distribution of the population within each municipality provides some determination of the demand for services and the ability of the population to withstand changes in tax rates.

Unit of Analysis: Demographic data is compiled at the municipal level and regionally aggregated for inside/outside the Pinelands and state analysis. In prior Long-Term Economic Monitoring Reports, analysis was mainly done by percentage under 18 and over 65 years of age. This year's report will look at median ages as well as population pyramids¹² using ESRI block group estimates of 2012 age/sex counts.

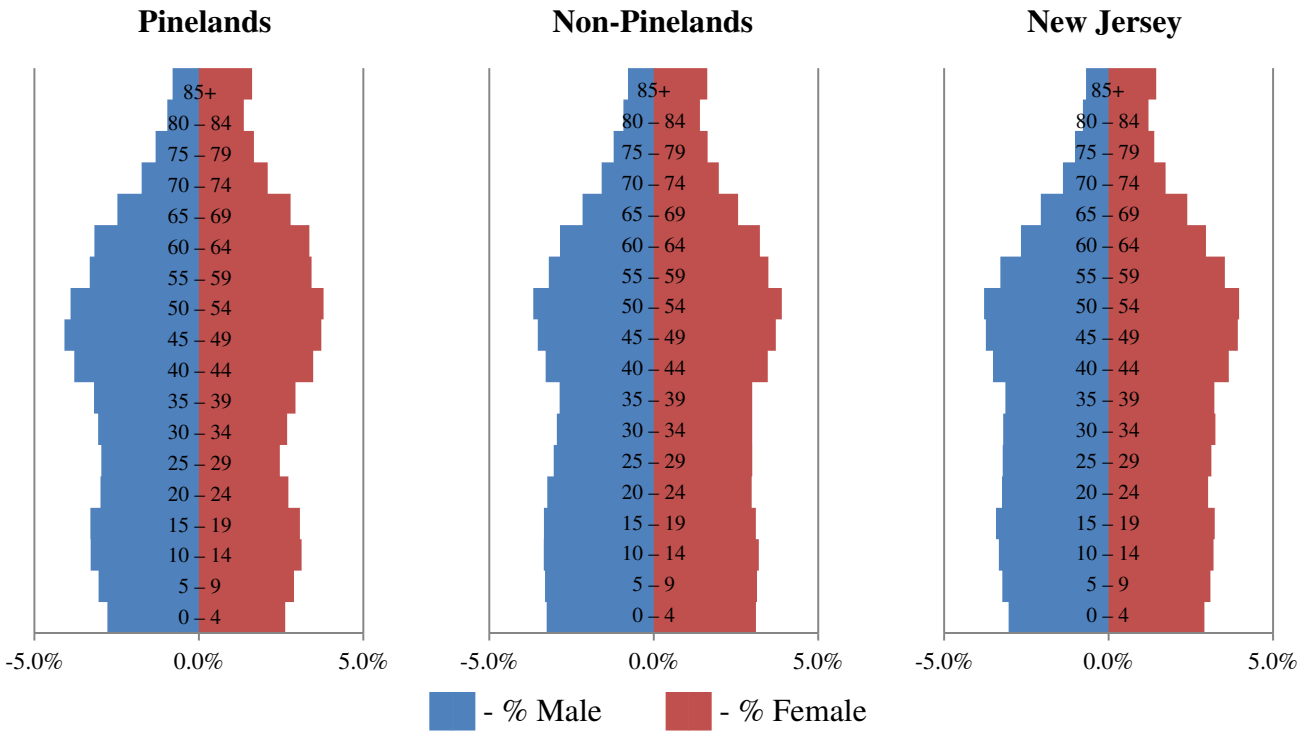
Findings: Like the population of the entire state, the population in the Pinelands is aging. In 1980, the Pinelands average median age was 32. Ten years later, the average median age increased to 35 and by 2000, it had climbed to 39. Based on data from the U.S. Census, the average median age was 42 in 2010. Likewise, the Non-Pinelands increased from an average 1980 median age of 34 to 42 in 2010. The 2010 average median age of the state is 42 years old, while the northern half of the state's average median age is 41.



Population pyramids of block group-level data also show an aging population, but not necessarily a declining one. As the baby boomer¹³ generation approaches greater numbers in senior citizenship, the median age will continue to increase until that generation no longer makes up such a significant portion of the population. The population pyramids should serve as a warning to governments: the baby boomers are entering into retirement ages and many may soon require greater amounts of targeted government-funded services; and with fewer work-force aged individuals to support those services via taxes, some municipalities may struggle to keep up financially.

¹² Population pyramids are a graphical representation of age and sex ratios for a given population. Bar graphs stacked one on top of another (males on the left, females on the right), show the percentage each age group makes up for the overall population. Traditionally, a triangle-shaped pyramid represents a growing population, while a rectangle shows no growth/decline, and an upside-down triangle represents a declining population.

¹³ Baby boomers are those portions of the population born between 1946 and 1964.



Among the Pinelands municipalities, Manchester Township has the oldest median age at 65, and it is also the only Pinelands municipality to have actually decreased in median age since 1980 (by one year). Berkeley Township has the next highest median age at 61. A likely explanation for the high median ages of these two municipalities is the location of significant senior citizen housing within their borders.

The youngest Pinelands municipality is Wrightstown Borough with a median age of 30. The next youngest is 32 in Lakehurst Borough. The median ages here are younger likely due to their proximity to Joint Base McGuire-Dix-Lakehurst, which attracts young families associated with military personnel (North Hanover Township, which has less than 10% of its land area inside the Pinelands Area boundary, is also in close proximity to the military base and has a median age of 29).

The average change in median age from 1980 to 2010 is 11 years older. The change from 2000 to 2010 is 4 years older. From 2000 to 2010, Ocean Township saw the greatest increase in median age from 38 to 50 (12 years), while Berkeley Township saw the greatest decrease from 66 to 61 (5 years).

Table P3

Pinelands Municipal Median Age – 1980 to 2010

Municipality	County	1980	1990	2000	2010
Manchester Township	Ocean	66	68	68	65
Berkeley Township	Ocean	59	65	66	61
Southampton Township	Burlington	44	46	50	54
Weymouth Township	Atlantic	29	33	39	50
Ocean Township	Ocean	45	35	38	50
Port Republic City	Atlantic	33	36	41	46
Barnegat Township	Ocean	29	33	39	46
Chesilhurst Borough	Camden	28	36	42	46
Little Egg Harbor Township	Ocean	37	35	40	45
Dennis Township	Cape May	30	33	37	45
Washington Township	Burlington	35	37	41	44
Stafford Township	Ocean	32	38	40	44
Medford Township	Burlington	31	37	40	44
Upper Township	Cape May	32	34	38	44
Estell Manor City	Atlantic	30	32	37	43
Woodland Township	Burlington	33	36	38	43
Eagleswood Township	Ocean	33	35	39	43
Bass River Township	Burlington	32	33	38	43
Woodbine Borough	Cape May	30	33	36	43
Tabernacle Township	Burlington	29	33	38	43
Medford Lakes Borough	Burlington	32	37	40	42
Buena Vista Township	Atlantic	29	35	39	42
Shamong Township	Burlington	29	34	37	42
Folsom Borough	Atlantic	27	32	38	42
Mullica Township	Atlantic	29	33	37	42
Jackson Township	Ocean	29	32	35	42
Lacey Township	Ocean	35	37	39	41
New Hanover Township	Burlington	21	24	32	41
Plumsted Township	Ocean	29	33	36	41
Evesham Township	Burlington	29	32	36	41
Franklin Township	Gloucester	28	31	36	40
Waterford Township	Camden	29	31	36	40
Hammonton Town	Atlantic	33	37	39	40
Berlin Township	Camden	28	32	36	39
Egg Harbor Township	Atlantic	31	33	36	39
Monroe Township	Gloucester	29	33	37	39
Galloway Township	Atlantic	28	30	34	39
Maurice River Township	Cumberland	31	33	36	38
Buena Borough	Atlantic	32	34	36	37
Winslow Township	Camden	29	31	34	37
Hamilton Township	Atlantic	30	31	35	37
Beachwood Borough	Ocean	29	31	35	37
Pemberton Township	Burlington	26	30	34	37
Egg Harbor City	Atlantic	29	32	35	36
South Toms River Borough	Ocean	24	28	32	34
Lakehurst Borough	Ocean	26	28	32	32
Wrightstown Borough	Burlington	22	24	31	30
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>					
Springfield Township	Burlington	31	36	39	44
Toms River Township	Ocean	33	36	40	43
Berlin Borough	Camden	31	35	38	41
Corbin City	Atlantic	50	37	37	39
Vineland City	Cumberland	31	34	37	38
North Hanover Township	Burlington	25	27	29	29

P4 Population Estimates

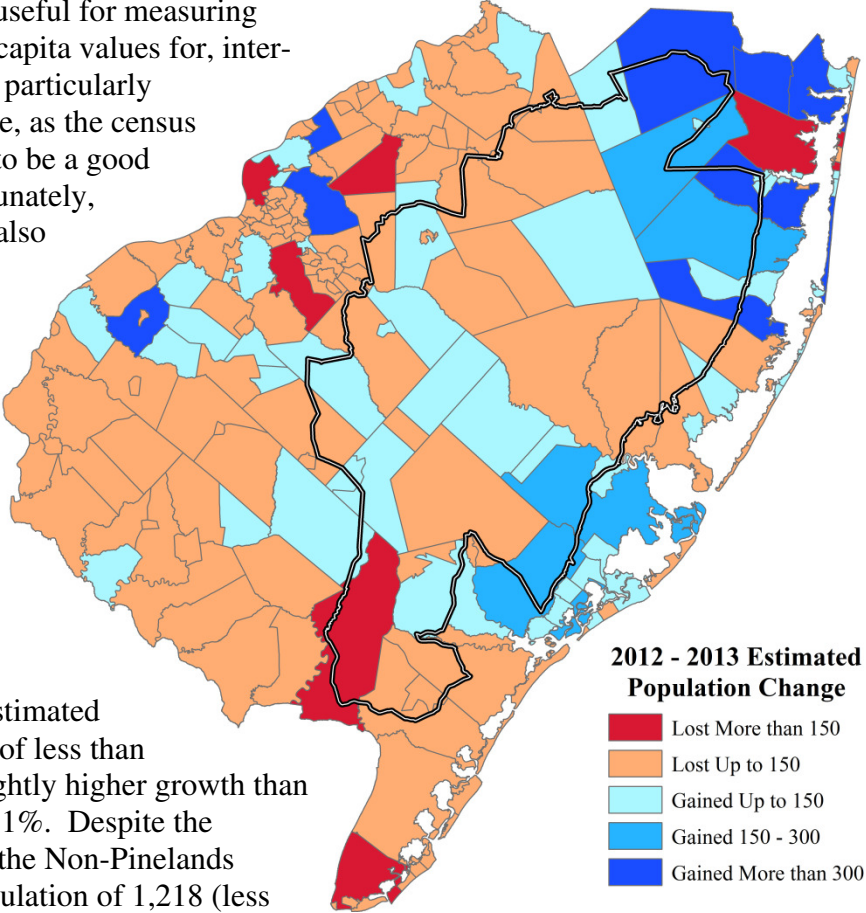
U.S. Census Bureau/N.J. Department of Labor 2008 - 2013
Updated for 2014 LTEM with 2013 data

In 2013, the Pinelands added an estimated 1,357 people (< 1%). This continues the trend of the Pinelands adding a greater percentage of residents than the Non-Pinelands, which saw a loss of an estimated 1,218 people (< 1%).

Description: Population estimates are useful for measuring population during, and calculating per capita values for, inter-census years. Population estimates are particularly important in the latter half of the decade, as the census year becomes more distant and ceases to be a good measure of current population. Unfortunately, estimates further from the census year also have a greater margin of error. Estimates are calculated using birth and death rates and a factor for migration.

Unit of Analysis: Population data are compiled at the municipal level and regionally aggregated for inside/outside the Pinelands. State level data is estimated on a state-wide basis.

Findings: The Pinelands grew by an estimated 1,357 people in 2013, which is growth of less than 1%. New Jersey, as a whole, saw a slightly higher growth than that of the Pinelands, but still less than 1%. Despite the positive growth elsewhere in the state, the Non-Pinelands actually saw a *decline* in estimated population of 1,218 (less than 1%). However, the long-term trends show all three regions growing, albeit, with the Non-Pinelands almost a full percentage point lower than the Pinelands and the state from the 2010 census.



2012 - 2013 Estimated Population Change

- Lost More than 150
- Lost Up to 150
- Gained Up to 150
- Gained 150 - 300
- Gained More than 300

Population Estimates

Region	2009	2010 Census	2011	2012	2013	5-Year Change	5-Year % Change
Pinelands	693,936	698,092	701,227	703,169	704,526	10,590	2%
Non-Pinelands	1,721,609	1,723,949	1,727,119	1,728,320	1,727,102	5,493	< 1%
State	8,755,602	8,791,894	8,836,639	8,867,749	8,899,339	143,737	2%

Of the 47 Pinelands municipalities with at least 10% land in the Pinelands Area, Barnegat Township, Jackson Township, and Berkeley Township saw estimated growth exceeding 300 people at 477, 426, and 308 people, respectively. Barnegat Township also saw the greatest percentage increase of 2%. Twenty-five Pinelands municipalities saw growth in total, with 12 of those growing by less than half a percent. Conversely, 21 Pinelands municipalities saw declines in estimated population with 17 declining by less than half a percent. Maurice River Township saw the greatest total decline in estimated population of 432 people (down 5%; the greatest percent decline among the Pinelands municipalities).

Table P4

Municipal Population Estimates

Full Name	County	2009	2010	2011	2012	2013	5-Year Change	South N.J. Rank 5-Year Change	5-Year Change (%)
Jackson Township	Ocean	54,094	54,856	55,380	55,653	56,079	1,985	2	4%
Barneget Township	Ocean	20,563	20,936	21,306	21,436	21,913	1,350	4	7%
Egg Harbor Township	Atlantic	42,528	43,323	43,509	43,690	43,872	1,344	5	3%
Monroe Township	Gloucester	35,784	36,129	36,623	36,664	36,732	948	7	3%
Stafford Township	Ocean	26,304	26,535	26,659	26,964	26,941	637	10	2%
Hamilton Township	Atlantic	26,165	26,503	26,673	26,783	26,752	587	12	2%
Galloway Township	Atlantic	37,062	37,349	37,308	37,373	37,646	584	13	2%
Berkeley Township	Ocean	41,267	41,255	41,409	41,521	41,829	562	14	1%
Little Egg Harbor Township	Ocean	19,811	20,065	20,228	20,454	20,344	533	15	3%
Manchester Township	Ocean	42,868	43,070	43,055	43,104	43,342	474	18	1%
Lacey Township	Ocean	27,555	27,644	27,738	27,845	28,021	466	19	2%
Ocean Township	Ocean	8,211	8,332	8,455	8,524	8,653	442	20	5%
New Hanover Township	Burlington	7,651	7,385	7,834	7,943	7,942	291	24	4%
Evesham Township	Burlington	45,355	45,538	45,777	45,785	45,644	289	25	1%
Medford Township	Burlington	23,006	23,033	23,142	23,266	23,281	275	27	1%
Plumsted Township	Ocean	8,356	8,421	8,459	8,479	8,523	167	38	2%
Beachwood Borough	Ocean	11,023	11,045	11,076	11,108	11,172	149	39	1%
Waterford Township	Camden	10,657	10,649	10,689	10,729	10,792	135	41	1%
Buena Borough	Atlantic	4,568	4,603	4,606	4,624	4,626	58	54	1%
Hammonctown	Atlantic	14,741	14,791	14,753	14,773	14,799	58	54	0%
Winslow Township	Camden	39,118	39,499	39,290	39,292	39,165	47	57	0%
Woodland Township	Burlington	1,751	1,788	1,798	1,793	1,797	46	58	3%
Lakehurst Borough	Ocean	2,656	2,654	2,663	2,666	2,700	44	59	2%
Eagleswood Township	Ocean	1,593	1,603	1,609	1,613	1,621	28	64	2%
South Toms River Borough	Ocean	3,691	3,684	3,692	3,699	3,718	27	66	1%
Weymouth Township	Atlantic	2,691	2,715	2,712	2,716	2,716	25	67	1%
Mullica Township	Atlantic	6,156	6,147	6,149	6,173	6,176	20	68	0%
Chesilhurst Borough	Camden	1,625	1,634	1,640	1,636	1,637	12	72	1%
Port Republic City	Atlantic	1,113	1,115	1,112	1,115	1,123	10	74	1%
Buena Vista Township	Atlantic	7,587	7,570	7,563	7,588	7,595	8	75	0%
Estell Manor City	Atlantic	1,730	1,735	1,723	1,732	1,737	7	77	0%
Berlin Township	Camden	5,355	5,357	5,387	5,379	5,362	7	77	0%
Washington Township	Burlington	680	687	687	686	684	4	81	1%
Wrightstown Borough	Burlington	799	802	802	802	798	-1	88	0%
Tabernacle Township	Burlington	6,972	6,949	7,001	7,001	6,970	-2	91	0%
Bass River Township	Burlington	1,450	1,443	1,451	1,448	1,439	-11	107	-1%
Medford Lakes Borough	Burlington	4,152	4,146	4,142	4,152	4,136	-16	112	0%
Folsom Borough	Atlantic	1,895	1,885	1,883	1,876	1,873	-22	119	-1%
Egg Harbor City	Atlantic	4,278	4,243	4,237	4,239	4,246	-32	132	-1%
Woodbine Borough	Cape May	2,486	2,472	2,457	2,457	2,448	-38	138	-2%
Shamong Township	Burlington	6,502	6,490	6,475	6,474	6,444	-58	152	-1%
Franklin Township	Gloucester	16,809	16,820	16,806	16,756	16,741	-68	159	0%
Southampton Township	Burlington	10,474	10,464	10,458	10,433	10,390	-84	167	-1%
Pemberton Township	Burlington	27,999	27,912	27,959	27,991	27,914	-85	169	0%
Dennis Township	Cape May	6,444	6,467	6,414	6,392	6,344	-100	175	-2%
Upper Township	Cape May	12,298	12,373	12,274	12,248	12,187	-111	177	-1%
Maurice River Township	Cumberland	8,063	7,976	8,164	8,094	7,662	-401	199	-5%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>									
Vineland City	Cumberland	60,422	60,724	60,965	61,025	61,050	628	11	1%
Toms River Township	Ocean	91,349	91,239	91,992	92,158	91,583	234	32	0%
North Hanover Township	Burlington	7,554	7,678	7,690	7,692	7,669	115	43	2%
Berlin Borough	Camden	7,491	7,588	7,610	7,619	7,600	109	44	1%
Springfield Township	Burlington	3,402	3,414	3,418	3,420	3,407	5	80	0%
Corbin City	Atlantic	492	492	493	493	493	1	85	0%

R1 Building Permits for Dwelling Units

N.J. Department of Labor 1980 – 2013

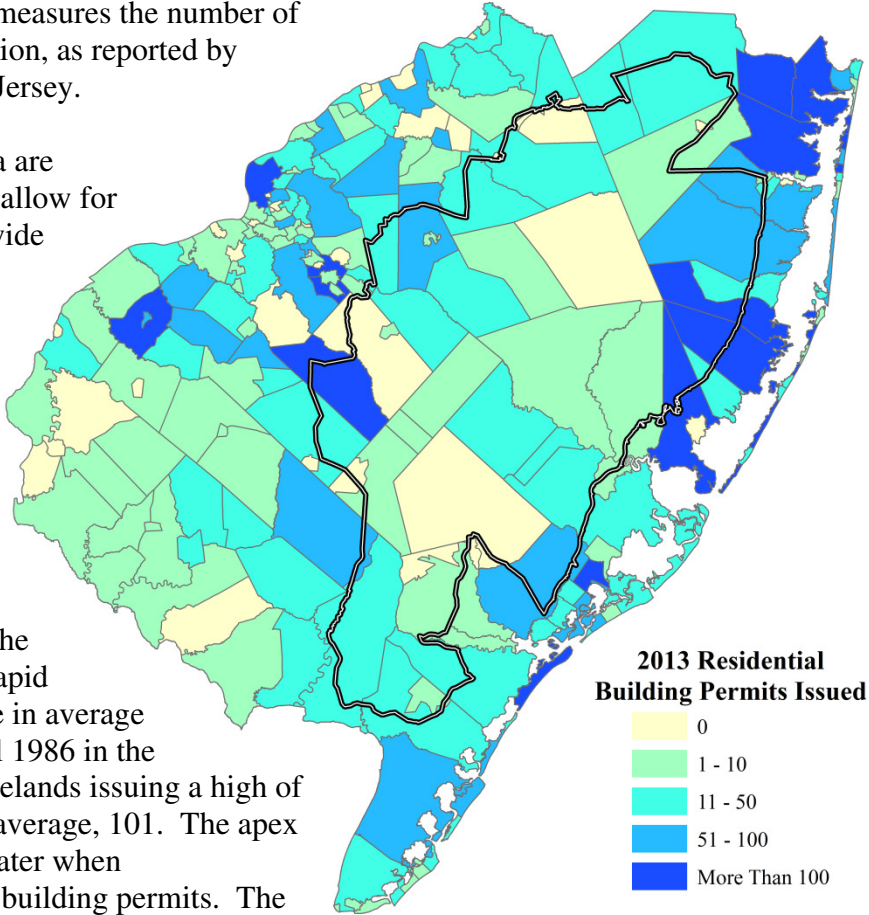
Updated for 2014 LTEM with 2013 data

In 2013, the municipal average number of building permits issued per municipality in the Pinelands increased by 25% to 31 permits. The average number of permits issued in the Non-Pinelands and the state rose by 57% (to 33) and 35% (to 43), respectively.

Description: Building permit activity measures the number of dwelling units authorized for construction, as reported by municipal building inspectors in New Jersey.

Unit of Analysis: Municipal level data are regionally aggregated and averaged to allow for inside/outside the Pinelands and statewide analysis.

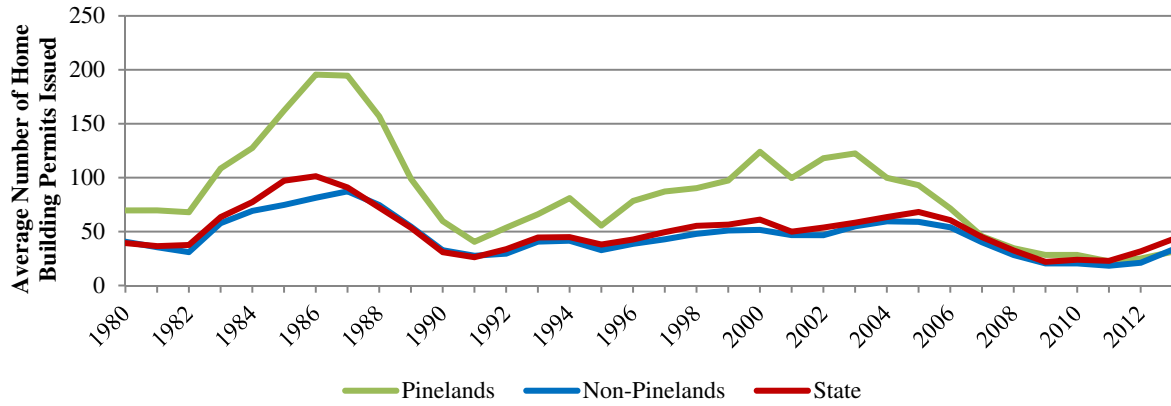
Findings: Beginning in the early 1980's and extending into the early 1990's, the Pinelands saw a greater average number of building permits issued than anywhere else in the state. In 1980, the average number of permits issued in the Pinelands was 70, while the Non-Pinelands and state issued 41 and 39, respectively. The year 1983 marked the beginning of a rapid increase across the state. This increase in average building permits issued continued until 1986 in the Pinelands and in the state, with the Pinelands issuing a high of 196 permits while the state issued, on average, 101. The apex in the Non-Pinelands occurred a year later when municipalities issued an average of 87 building permits. The 1986 high for the Pinelands was an increase of 181% over 1980.



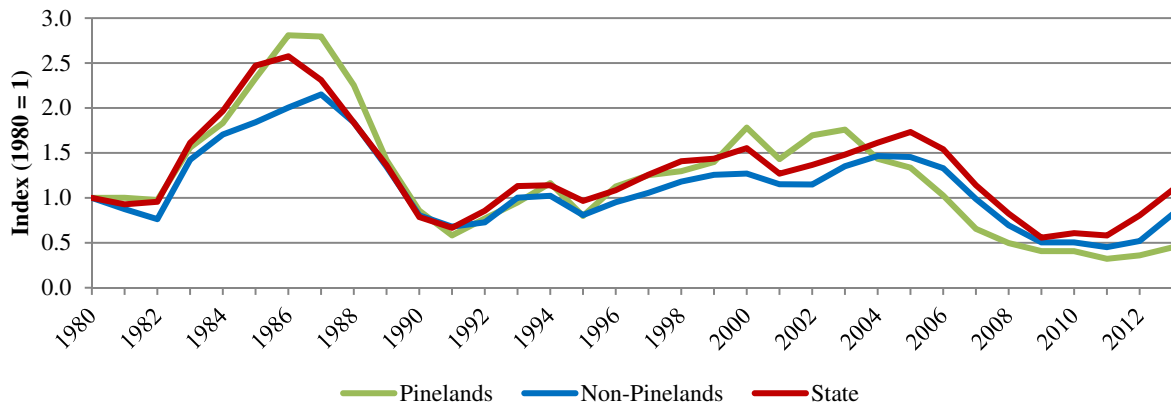
The year 1987 marked the beginning of a decline in average building permits issued in New Jersey. The decrease in permits issued continued until 1991. At that point, the Pinelands had fallen to an average of 41 permits issued (a decrease of 79% from the 1986 high point). The state bottomed out in 1991, issuing an average of 26 residential building permits per municipality (a decline of 74% from 1986), while the Non-Pinelands dropped to their low with an average of 28 permits (a decline of 68% from their 1987 high point).

From the early 1990's to the mid 2000's, the average number of residential building permits issued per municipality grew, but with some volatility. The Non-Pinelands and the state grew at a similar pace before declining again to their low points in the late 2000's/early 2010's. Growth was gradual in the Non-Pinelands and the state from their recent 1991 low points. The Pinelands showed a greater amount of instability as issued permits exceeded the 100's mark in 2000, but then fell below that mark in 2004.

Average Residential Units Authorized by Building Permits



Index of Residential Units Authorized by Building Permits



While the state fell to its low point in 2009 (an average of 22 permits issued), the Pinelands and the Non-Pinelands saw their low point in permits issued as recently as 2011. At that point, the Pinelands had issued, on average, 22 permits while the Non-Pinelands issued 18 permits. In 2013, all three regions have shown growth. The average number of permits issued in the Pinelands municipalities grew to 31 (up 25%) and the Non-Pinelands increased their issuance by 57% to 33 permits. From the 2009 low-point for the state, the average number of permits issued grew to 43 permits. Overall, the Pinelands have lost the “lead” that it enjoyed from 1980 to 2007, and now all three regions are roughly equal.

At the municipal level, Monroe Township had more building permits issued than any other Pinelands Municipality (326 permits issued, a 434% increase from 2012). Stafford Township saw the next highest at 238 permits issued followed by Barnegat Township, and Little Egg Harbor Township each issuing more than 100 permits. On the low end, eight municipalities did not issue any permits, while 13 others issued less than 10.

Compared to 2012, 23 municipalities issued more permits in 2013 at an average of about 23 permits; five municipalities issued the same number permits in 2013 as in 2012. Nineteen municipalities issued, on average, 13 fewer permits in 2013 than they did in 2012.

Table R1

Residential Building Permits Issued

Municipality	County	2009	2010	2011	2012	2013	5-Year Total	5-Year Average	5-Year Change	5-Year % Change
Monroe Township	Gloucester	89	208	63	61	326	747	149	237	266%
Stafford Township	Ocean	53	58	168	130	238	647	129	185	349%
Medford Township	Burlington	21	37	54	47	70	229	46	49	233%
Little Egg Harbor Township	Ocean	55	72	76	57	103	363	73	48	87%
Lacey Township	Ocean	37	27	45	50	82	241	48	45	122%
Berkeley Township	Ocean	41	71	56	71	81	320	64	40	98%
Waterford Township	Camden	13	16	22	38	36	125	25	23	177%
South Toms River Borough	Ocean	0	1	1	0	9	11	2	9	100%
Egg Harbor City	Atlantic	9	15	14	13	17	68	14	8	89%
Maurice River Township	Cumberland	7	11	7	13	14	52	10	7	100%
Franklin Township	Gloucester	19	19	14	18	25	95	19	6	32%
Shamong Township	Burlington	7	9	9	9	12	46	9	5	71%
Upper Township	Cape May	10	13	12	13	15	63	13	5	50%
Beachwood Borough	Ocean	11	5	9	4	15	44	9	4	36%
Plumsted Township	Ocean	13	15	14	16	17	75	15	4	31%
Mullica Township	Atlantic	15	12	12	16	18	73	15	3	20%
Berlin Township	Camden	21	27	17	21	24	110	22	3	14%
Dennis Township	Cape May	8	8	10	11	11	48	10	3	38%
Eagleswood Township	Ocean	9	11	10	11	12	53	11	3	33%
Folsom Borough	Atlantic	0	1	1	2	1	5	1	1	100%
Port Republic City	Atlantic	0	0	1	3	1	5	1	1	100%
Washington Township	Burlington	1	3	2	4	2	12	2	1	100%
Manchester Township	Ocean	1	3	1	1	2	8	2	1	100%
Southampton Township	Burlington	13	13	10	12	13	61	12	0	0%
Wrightstown Borough	Burlington	0	0	0	0	0	0	0	0	0%
Lakehurst Borough	Ocean	0	2	0	7	0	9	2	0	0%
Buena Borough	Atlantic	1	4	2	1	0	8	2	-1	-100%
Bass River Township	Burlington	2	0	0	0	1	3	1	-1	-50%
Medford Lakes Borough	Burlington	7	9	8	7	6	37	7	-1	-14%
Weymouth Township	Atlantic	2	1	1	1	0	5	1	-2	-100%
Tabernacle Township	Burlington	5	2	1	1	2	11	2	-3	-60%
Woodland Township	Burlington	3	5	3	9	0	20	4	-3	-100%
Estell Manor City	Atlantic	6	3	2	2	2	15	3	-4	-67%
Galloway Township	Atlantic	35	16	21	32	31	135	27	-4	-11%
New Hanover Township	Burlington	4	4	2	0	0	10	2	-4	-100%
Chesilhurst Borough	Camden	7	5	4	1	1	18	4	-6	-86%
Buena Vista Township	Atlantic	14	5	7	4	6	36	7	-8	-57%
Hammonton Town	Atlantic	15	5	10	15	7	52	10	-8	-53%
Woodbine Borough	Cape May	13	6	3	0	4	26	5	-9	-69%
Pemberton Township	Burlington	28	18	22	17	13	98	20	-15	-54%
Barneget Township	Ocean	142	118	51	161	122	594	119	-20	-14%
Winslow Township	Camden	41	36	20	4	0	101	20	-41	-100%
Ocean Township	Ocean	90	42	37	64	20	253	51	-70	-78%
Egg Harbor Township	Atlantic	139	101	64	81	65	450	90	-74	-53%
Jackson Township	Ocean	110	155	80	45	34	424	85	-76	-69%
Hamilton Township	Atlantic	85	85	51	5	0	226	45	-85	-100%
Evesham Township	Burlington	131	55	37	101	11	335	67	-120	-92%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>										
Toms River Township	Ocean	69	368	103	76	418	1,034	207	349	506%
North Hanover Township	Burlington	8	11	9	11	15	54	11	7	88%
Springfield Township	Burlington	1	1	2	2	3	9	2	2	200%
Corbin City	Atlantic	2	5	2	1	2	12	2	0	0%
Vineland City	Cumberland	97	77	79	75	89	417	83	-8	-8%
Berlin Borough	Camden	12	9	7	4	1	33	7	-11	-92%

R2 Home Transactions and Prices

N.J. Department of the Treasury, Division of Taxation 1994 – 2013

Updated for 2014 LTEM with 2013 data (includes point data new to the 2014 LTEM)

In 2013, home sales increased by 34% to 4,167 sales in the Pinelands municipalities, for an average selling price of \$227,000 (down 5% from 2012). Sales in the Non-Pinelands municipalities increased 7% (to 10,217) for an average price of \$323,000 (down 6%). New point-level data revealed that 1,489 homes were sold inside the Pinelands Area boundary at an average of \$229,000 compared to 12,895 homes sold in the Non-Pinelands at an average of \$302,000.

Description: The number of homes sold in each municipality is derived from usable sales data compiled by the New Jersey Department of Treasury.

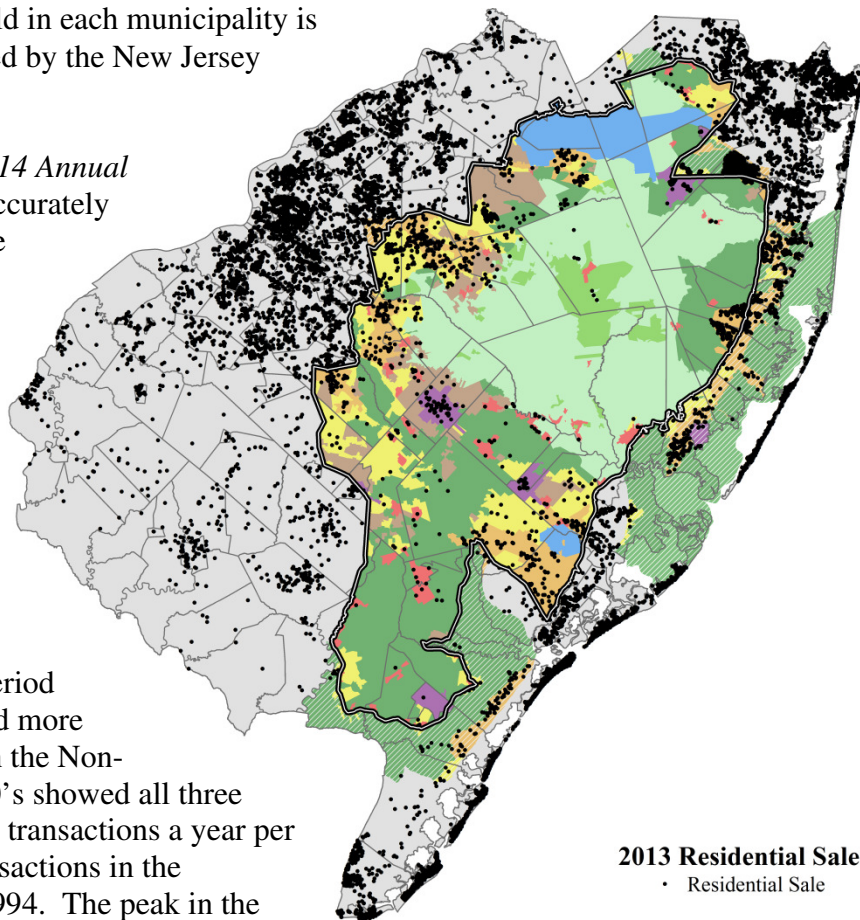
Unit of Analysis: Beginning in the 2014 Annual Report, home sales data is able to be accurately identified as being inside or outside the Pinelands Area boundary. Therefore, home sales are aggregated to allow for inside/outside the Pinelands analysis¹⁴. Until the additional years of data can be made available, the analysis will include the prior municipally aggregated data as a unit of analysis.

Findings:

Regional-level transaction data:

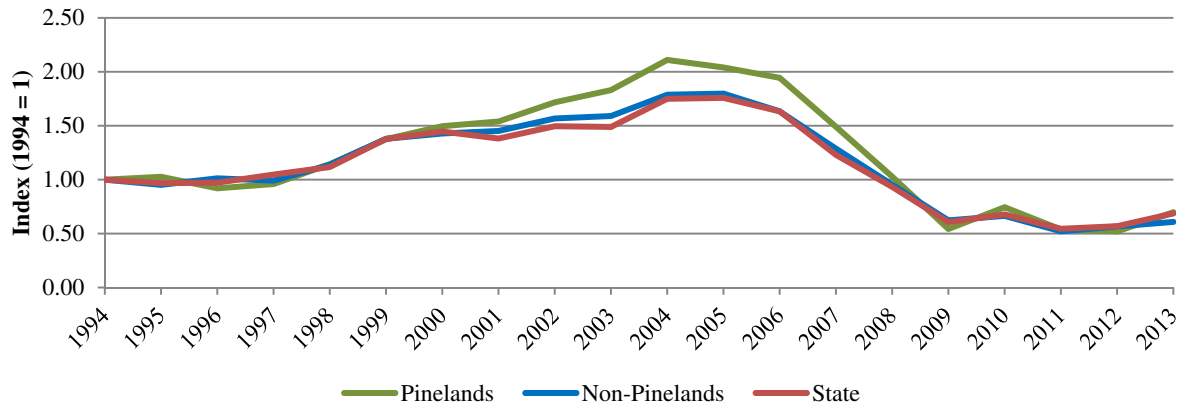
Throughout much of the monitoring period (1994 through 2013), the Pinelands had more transactions per municipality than both the Non-Pinelands and the state. The mid-1990's showed all three regions hovering between 100 and 150 transactions a year per municipality. At its peak in 2004, transactions in the Pinelands were 111% higher than in 1994. The peak in the Non-Pinelands municipalities and the state occurred in 2005 when transactions were 80% and 76% higher than their 1994 numbers, respectively.

A year later, all three regions declined as the nation-wide housing market began to tumble. The decline that began in the mid-2000's continued until about 2009, when the number of transactions began to stabilize. Of the three regions, the Pinelands municipalities saw the greatest 2013 increase (up 34% from 2012 to 4,167 total transactions). The Non-Pinelands municipalities saw the number of transactions increase by 7% to 10,217 in 2013, and the state saw their average increase by 21% to 49,987. For comparison, the northern half of New Jersey experienced a 24% increase from 2012.



¹⁴ Home sales data is obtained in database format for all real-estate transactions throughout New Jersey. Using Division of Taxation data, sales are filtered to remove non-residential sales and then filtered again to isolate transactions that the Division refers to as “useable sale in the sales ratio study” (e.g. sales to/from family members for non-market values, or sales to/from government agencies are not included in the analysis). The resulting data is then geocoded by address. Property transactions that are unable to be geocoded are then joined by tax block and/or manually matched to a street address.

Index of Residential Property Transactions



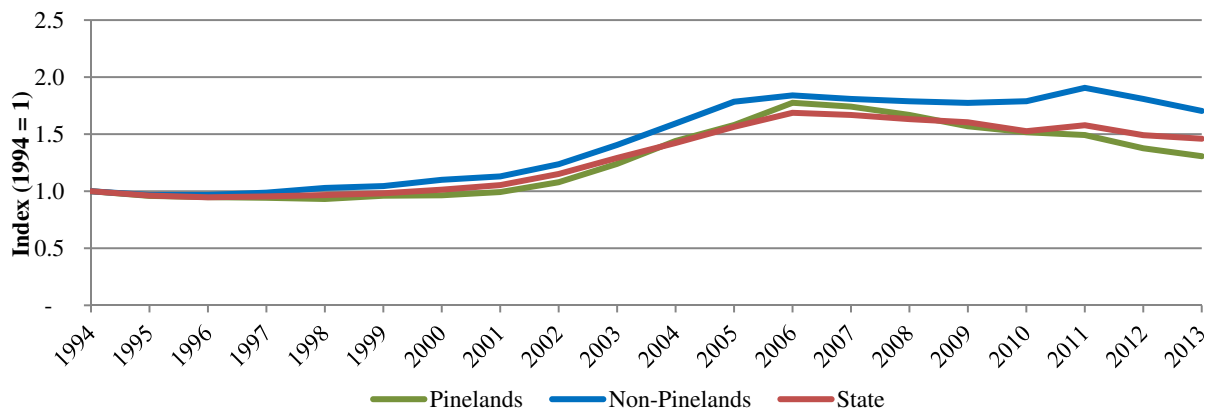
Regional selling price data:

The average home-selling prices for all three regions followed a similar pattern to that of the number of transactions, except a few years delayed and with less volatility. Prices in 1994 began a slight decline before leveling out in the mid-to-late 1990's. At the end of the decade, selling prices quickly ascended until the mid-2000's, when prices reached their highest point in 2006 (except in the Non-Pinelands). In 2006, the average home-selling prices in the Pinelands were 78% higher than those in 1994. The state's average prices were 69% higher in 2006 than in 1994 and the Non-Pinelands were 84% higher.

In the Pinelands, the average 2013 selling price was about \$227,000, a 5% decrease from 2012. The Non-Pinelands continued to fall (down 6% to about a \$323,000 average) while the state fell by only 2% to \$384,000. Average home selling prices of homes in the Non-Pinelands have clearly suffered the least as a result of the economic recession; currently, prices there are about 93% of what they were in 2006. Conversely, the Pinelands' average home prices, at 74% of their 2006 height, are the furthest from their previous peaks.

When viewing the regions relative to one another, the average home prices in the three regions tracked fairly close together up until about 2007. In 2007, the Pinelands municipalities and the state began declining while the Non-Pinelands municipalities were somewhat stable. The Non-Pinelands and the state saw brief upticks in the early part of the 2010's but resumed their decline in 2012 and 2013.

Index of Average Home Selling Prices



Sub-municipal data:

As part of the ongoing effort to more effectively distinguish economic activity that is actually happening inside the Pinelands Area versus outside the Area¹⁵, point data was acquired for New Jersey home sales. Using the Pinelands Commission’s GIS capabilities, staff was able to estimate locations for selected home sales. While this *Annual Report* can only report on 2013 sales data, future reports may also feature prior years as well.

In 2013, 1,489 homes were sold inside the Pinelands Area for an average of about \$229,000. In the Non-Pinelands, 12,895 homes were sold for about \$302,000 while 49,987 homes were sold in the state, overall, for an average of \$384,000. For comparison, 35,603 Northern New Jersey homes were sold for an average of about \$420,000.

More Pinelands Area homes were sold in Medford Township than anywhere else (158 homes sold). Hamilton Township, Evesham Township, and Southampton Township were the only other municipalities to have more than 100 Pinelands Area homes sold. Medford Township homes in the Pinelands Area also sold for the greatest amount (an average of about \$396,000).

By Pinelands Management Area, the homes with the highest average sale price were located in the Preservation Areas, followed by homes in the Agricultural Production Areas, then by those in the Forest Areas. Preservation Area homes averaged prices of about \$290,000 while the average prices of homes in Agricultural Production and Forest Areas were about \$270,000 and \$260,000, respectively. The data is interesting in that homes in Pinelands conservation Management Areas were valued higher than those in Areas slated for greater development (including sewer service). Regional Growth and Rural Development Area homes sold for about \$230,000, while Village Area and Town Area homes both sold for less, on average.

Homes Sold by Management Area

Pinelands Management Areas	Pinelands Area		National Reserve	
	Homes Sold	Avg. Price	Homes Sold	Avg. Price
Preservation Area	20	\$290,290	-	-
Forest Area	57	\$256,204	116	\$220,040
Agricultural Production Area	31	\$266,003	-	-
Rural Development Area	391	\$231,293	88	\$174,491
Regional Growth Area	792	\$231,914	1,094	\$201,791
Pinelands Town	125	\$175,205	14	\$208,393
Federal/Military Area	0	-	-	-
Pinelands Village	72	\$217,940	0	-
Special Ag. Production Area	1	\$975,000	-	-

When Pinelands Management Areas are compared to the Management Areas in the Pinelands National Reserve, there is another interesting occurrence: those homes inside the Pinelands Area boundary had higher average prices than their counterparts in the Pinelands National Reserve. The only exception to this rule is the Pinelands Town Area in Tuckerton Township where prices may be higher due to the presence of bay-front properties.

¹⁵The Pinelands Area is different from the Pinelands municipalities in that the Pinelands Area refers to the boundary established by state law. The Pinelands municipalities are a collection of municipalities with at least 10% of their land area inside the Pinelands boundary that is used in this report when sub-municipal data is not available.

Table R2a

Residential Housing Transactions

Municipality	County	2009	2010	2011	2012	2013	5-Year Change	5-Year % Change	5-Year Average
Berkeley Township	Ocean	265	150	239	319	654	389	147%	325
Jackson Township	Ocean	120	393	249	311	400	280	233%	295
Evesham Township	Burlington	145	376	179	176	340	195	134%	243
Galloway Township	Atlantic	86	302	227	209	266	180	209%	218
Manchester Township	Ocean	70	215	181	210	200	130	186%	175
Lacey Township	Ocean	89	217	159	129	191	102	115%	157
Barneget Township	Ocean	89	76	35	89	145	56	63%	87
Upper Township	Cape May	51	67	78	84	106	55	108%	77
Medford Township	Burlington	147	182	159	49	195	48	33%	146
Southampton Township	Burlington	95	115	88	33	132	37	39%	93
Dennis Township	Cape May	20	36	22	21	38	18	90%	27
Beachwood Borough	Ocean	47	63	42	31	63	16	34%	49
Buena Borough	Atlantic	13	20	19	11	25	12	92%	18
Little Egg Harbor Township	Ocean	136	193	132	126	146	10	7%	147
Shamong Township	Burlington	24	35	39	19	33	9	38%	30
Egg Harbor City	Atlantic	12	14	17	4	16	4	33%	13
Eagleswood Township	Ocean	4	6	7	5	8	4	100%	6
Tabernacle Township	Burlington	43	49	46	28	46	3	7%	42
Woodland Township	Burlington	4	14	5	5	7	3	75%	7
Weymouth Township	Atlantic	6	10	4	3	8	2	33%	6
Bass River Township	Burlington	3	6	2	4	5	2	67%	4
Woodbine Borough	Cape May	0	6	1	1	2	2	100%	2
Estell Manor City	Atlantic	6	7	5	8	7	1	17%	7
Port Republic City	Atlantic	4	9	7	5	5	1	25%	6
Wrightstown Borough	Burlington	3	2	1	1	4	1	33%	2
Chesilhurst Borough	Camden	2	3	6	0	3	1	50%	3
Buena Vista Township	Atlantic	16	8	12	3	16	0	0%	11
Berlin Township	Camden	16	17	15	14	16	0	0%	16
Mullica Township	Atlantic	29	35	31	33	27	-2	-7%	31
New Hanover Township	Burlington	5	8	1	2	3	-2	-40%	4
Washington Township	Burlington	3	3	1	1	1	-2	-67%	2
Folsom Borough	Atlantic	10	9	11	6	7	-3	-30%	9
Lakehurst Borough	Ocean	8	9	6	5	3	-5	-63%	6
Maurice River Township	Cumberland	14	5	13	4	8	-6	-43%	9
Ocean Township	Ocean	71	66	58	20	65	-6	-8%	56
South Toms River Borough	Ocean	15	5	6	3	9	-6	-40%	8
Plumsted Township	Ocean	24	24	22	31	17	-7	-29%	24
Hammonton Town	Atlantic	80	61	60	54	70	-10	-13%	65
Medford Lakes Borough	Burlington	43	7	26	17	31	-12	-28%	25
Waterford Township	Camden	66	77	32	49	52	-14	-21%	55
Monroe Township	Gloucester	172	195	117	167	152	-20	-12%	161
Franklin Township	Gloucester	92	91	59	56	34	-58	-63%	66
Hamilton Township	Atlantic	197	239	48	114	132	-65	-33%	146
Pemberton Township	Burlington	178	189	119	91	104	-74	-42%	136
Stafford Township	Ocean	210	277	217	237	105	-105	-50%	209
Winslow Township	Camden	271	220	183	59	163	-108	-40%	179
Egg Harbor Township	Atlantic	237	332	226	258	107	-130	-55%	232
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>									
Toms River Township	Ocean	244	891	523	508	316	72	30%	496
Berlin Borough	Camden	45	53	11	43	54	9	20%	41
Springfield Township	Burlington	15	14	7	16	19	4	27%	14
Corbin City	Atlantic	4	1	1	2	4	0	0%	2
North Hanover Township	Burlington	18	12	6	6	13	-5	-28%	11
Vineland City	Cumberland	223	303	196	236	85	-138	-62%	209

Table R2b

Average Selling Price of Homes

Municipality	County	2009	2010	2011	2012	2013	2013 South N.J. Rank
Medford Township	Burlington	\$407,900	\$368,212	\$374,758	\$322,496	\$379,426	27
Shamong Township	Burlington	\$402,465	\$403,158	\$333,804	\$336,543	\$372,803	28
Plumsted Township	Ocean	\$329,260	\$327,939	\$307,111	\$307,232	\$348,122	31
Port Republic City	Atlantic	\$335,938	\$271,049	\$323,269	\$329,253	\$336,738	33
Upper Township	Cape May	\$378,044	\$375,779	\$356,606	\$359,354	\$314,707	37
Woodland Township	Burlington	\$218,502	\$232,661	\$209,925	\$260,927	\$310,843	38
Jackson Township	Ocean	\$330,405	\$343,138	\$328,571	\$315,298	\$309,098	40
Washington Township	Burlington	\$260,968	\$302,695	\$214,896	\$298,306	\$285,000	47
Tabernacle Township	Burlington	\$364,066	\$325,450	\$338,547	\$330,782	\$280,607	49
Eagleswood Township	Ocean	\$248,662	\$245,361	\$230,579	\$245,545	\$278,563	50
Ocean Township	Ocean	\$337,610	\$325,697	\$314,290	\$297,614	\$276,070	51
Lacey Township	Ocean	\$299,897	\$297,969	\$309,423	\$314,554	\$274,977	53
Medford Lakes Borough	Burlington	\$343,404	\$376,054	\$296,272	\$300,891	\$272,666	57
Evesham Township	Burlington	\$289,495	\$266,936	\$289,769	\$286,950	\$258,225	65
Dennis Township	Cape May	\$293,195	\$279,456	\$275,312	\$223,754	\$249,884	68
Weymouth Township	Atlantic	\$211,363	\$254,958	\$239,622	\$174,350	\$246,125	70
Buena Vista Township	Atlantic	\$207,369	\$235,234	\$232,407	\$144,418	\$238,844	77
Barnegat Township	Ocean	\$314,444	\$297,119	\$253,630	\$241,847	\$237,402	78
Bass River Township	Burlington	\$321,052	\$311,242	\$240,270	\$169,319	\$236,200	80
Hammonton Town	Atlantic	\$235,993	\$240,448	\$228,542	\$230,001	\$230,323	83
Egg Harbor Township	Atlantic	\$274,693	\$265,341	\$251,412	\$220,013	\$229,956	84
Stafford Township	Ocean	\$333,060	\$321,965	\$312,391	\$274,179	\$220,957	88
Beachwood Borough	Ocean	\$282,813	\$273,628	\$231,175	\$221,174	\$215,685	95
Estell Manor City	Atlantic	\$332,635	\$249,868	\$233,849	\$168,292	\$208,471	101
Folsom Borough	Atlantic	\$204,185	\$180,347	\$197,953	\$186,272	\$207,814	104
Wrightstown Borough	Burlington	\$174,461	\$227,983	\$292,052	\$147,124	\$205,000	105
Galloway Township	Atlantic	\$227,295	\$217,545	\$217,523	\$202,770	\$200,960	107
Monroe Township	Gloucester	\$245,333	\$227,156	\$210,142	\$207,912	\$198,165	110
Franklin Township	Gloucester	\$239,754	\$224,186	\$214,579	\$206,818	\$195,101	115
Hamilton Township	Atlantic	\$220,015	\$196,561	\$200,732	\$200,040	\$194,327	116
Southampton Township	Burlington	\$212,582	\$227,501	\$198,750	\$175,689	\$193,081	119
Little Egg Harbor Township	Ocean	\$268,523	\$244,270	\$220,203	\$212,269	\$192,014	121
Mullica Township	Atlantic	\$286,114	\$238,770	\$244,095	\$203,429	\$191,911	122
New Hanover Township	Burlington	\$305,887	\$316,655	\$243,377	\$155,531	\$181,000	124
Winslow Township	Camden	\$222,681	\$208,997	\$194,657	\$177,551	\$177,934	127
Berlin Township	Camden	\$214,986	\$190,296	\$179,322	\$176,893	\$174,869	131
South Toms River Borough	Ocean	\$233,814	\$202,054	\$197,170	\$144,080	\$170,489	137
Waterford Township	Camden	\$227,742	\$209,443	\$207,778	\$177,719	\$165,535	143
Berkeley Township	Ocean	\$261,185	\$240,076	\$238,109	\$197,134	\$165,194	145
Buena Borough	Atlantic	\$181,501	\$185,511	\$185,288	\$164,401	\$161,660	151
Pemberton Township	Burlington	\$202,440	\$185,409	\$177,170	\$178,855	\$160,391	152
Woodbine Borough	Cape May	-	\$201,452	\$310,693	\$273,955	\$160,250	153
Maurice River Township	Cumberland	\$183,192	\$226,060	\$227,276	\$175,280	\$159,438	154
Lakehurst Borough	Ocean	\$242,011	\$207,791	\$177,268	\$244,916	\$148,333	165
Egg Harbor City	Atlantic	\$183,782	\$181,148	\$149,913	\$148,900	\$144,844	170
Manchester Township	Ocean	\$239,479	\$208,610	\$208,883	\$175,699	\$133,027	179
Chesilhurst Borough	Camden	\$152,020	\$219,863	\$162,769	-	\$126,333	184
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
North Hanover Township	Burlington	\$368,221	\$344,182	\$274,619	\$337,015	\$303,962	42
Toms River Township	Ocean	\$363,674	\$371,423	\$383,925	\$350,187	\$273,053	56
Springfield Township	Burlington	\$301,659	\$381,541	\$245,004	\$291,299	\$263,286	63
Berlin Borough	Camden	\$271,916	\$246,022	\$242,562	\$217,199	\$243,439	71
Vineland City	Cumberland	\$195,580	\$192,563	\$174,472	\$173,412	\$171,146	136
Corbin City	Atlantic	\$110,961	\$254,264	\$283,767	\$327,224	\$146,275	168

Table R2c

2013 Pinelands Area Home Sales

Municipality	County	Inside Pinelands Area Boundary		Outside Pinelands Area Boundary	
		Number of Sales	Average Sales Price	Number of Sales	Average Sales Price
Buena Borough	Atlantic	2	\$193,000	23	\$158,935
Buena Vista Township	Atlantic	14	\$246,821	2	\$183,000
Egg Harbor City	Atlantic	16	\$144,844	0	-
Egg Harbor Township	Atlantic	60	\$224,773	47	\$236,572
Estell Manor City	Atlantic	6	\$220,383	1	\$137,000
Folsom Borough	Atlantic	7	\$207,814	0	-
Galloway Township	Atlantic	86	\$218,497	180	\$192,581
Hamilton Township	Atlantic	124	\$189,361	8	\$271,313
Hammonton Town	Atlantic	70	\$230,323	0	-
Mullica Township	Atlantic	27	\$191,911	0	-
Port Republic City	Atlantic	1	\$310,000	4	\$343,422
Weymouth Township	Atlantic	5	\$214,100	3	\$299,500
Bass River Township	Burlington	4	\$260,250	1	\$140,000
Evesham Township	Burlington	111	\$259,481	229	\$257,617
Medford Lakes Borough	Burlington	31	\$272,666	0	-
Medford Township	Burlington	158	\$396,339	37	\$307,203
New Hanover Township	Burlington	0	-	3	\$181,000
Pemberton Township	Burlington	99	\$159,910	5	\$169,900
Shamong Township	Burlington	33	\$372,803	0	-
Southampton Township	Burlington	109	\$168,687	23	\$308,687
Tabernacle Township	Burlington	46	\$280,607	0	-
Washington Township	Burlington	1	\$285,000	0	-
Woodland Township	Burlington	7	\$310,843	0	-
Wrightstown Borough	Burlington	0	-	4	\$205,000
Berlin Township	Camden	0	-	16	\$174,869
Chesilhurst Borough	Camden	3	\$126,333	0	-
Waterford Township	Camden	52	\$165,535	0	-
Winslow Township	Camden	82	\$192,483	81	\$163,206
Dennis Township	Cape May	8	\$209,625	30	\$260,620
Upper Township	Cape May	2	\$296,500	104	\$315,057
Woodbine Borough	Cape May	2	\$160,250	0	-
Maurice River Township	Cumberland	2	\$175,000	6	\$154,250
Franklin Township	Gloucester	8	\$181,688	26	\$199,229
Monroe Township	Gloucester	58	\$198,319	94	\$198,070
Barneget Township	Ocean	69	\$242,913	76	\$232,399
Beachwood Borough	Ocean	0	-	63	\$215,685
Berkeley Township	Ocean	43	\$159,372	611	\$165,603
Eagleswood Township	Ocean	0	-	8	\$278,563
Jackson Township	Ocean	17	\$280,971	383	\$310,347
Lacey Township	Ocean	4	\$284,625	187	\$274,771
Lakehurst Borough	Ocean	3	\$148,333	0	-
Little Egg Harbor Township	Ocean	0	-	146	\$192,014
Manchester Township	Ocean	40	\$134,870	160	\$132,566
Ocean Township	Ocean	0	-	65	\$276,070
Plumsted Township	Ocean	0	-	17	\$348,122
South Toms River Borough	Ocean	6	\$184,750	3	\$141,967
Stafford Township	Ocean	72	\$192,455	33	\$283,143
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>					
Corbin City	Atlantic	0	-	4	\$146,275
North Hanover Township	Burlington	0	-	13	\$303,962
Springfield Township	Burlington	0	-	19	\$263,286
Berlin Borough	Camden	1	\$148,000	53	\$245,240
Vineland City	Cumberland	0	-	85	\$171,146
Toms River Township	Ocean	0	-	316	\$273,053

R3S Census of Housing

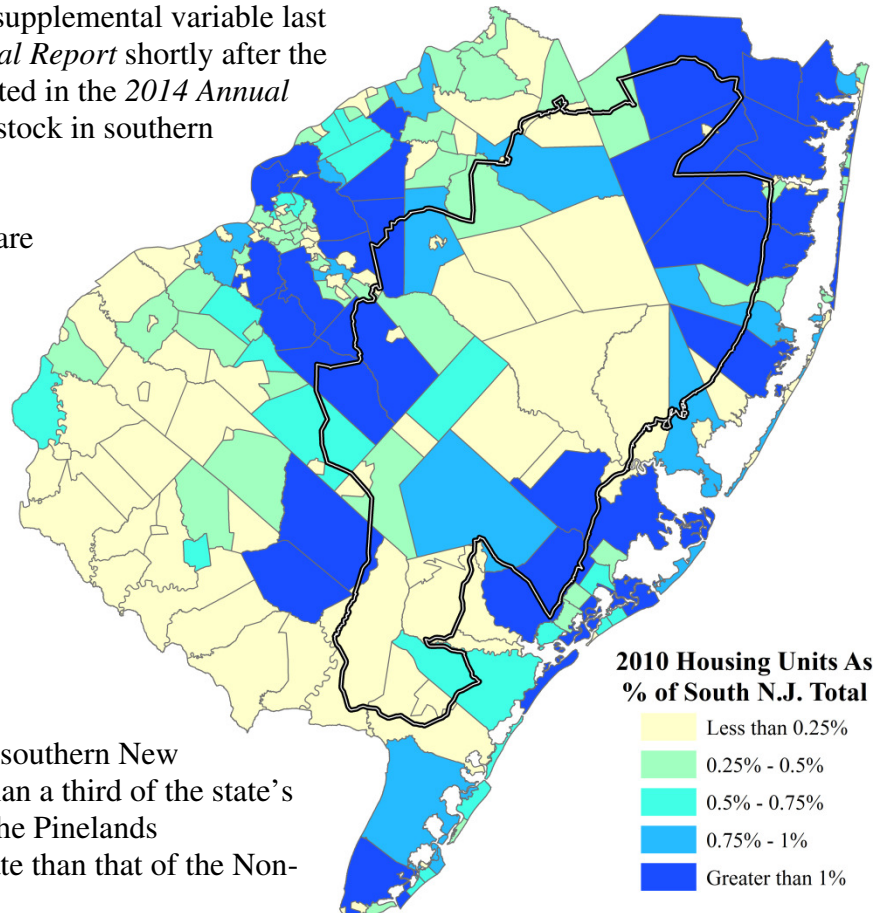
U.S. Census Bureau 1990, 2000, 2010
Supplemental Variable for 2014 LTEM

In 2010, there were about 118,555 housing units in the Pinelands Area and 958,058 in the Non-Pinelands (increases of 16% and 8%, respectively, from 2000). Additionally, home ownership remains higher in the Pinelands (83%) than in the Non-Pinelands (74%).

Description: The Census of Housing supplemental variable last made an appearance in the *2003 Annual Report* shortly after the 2000 Census. The variables are revisited in the *2014 Annual Report* to evaluate changes in housing stock in southern New Jersey.

Unit of Analysis: Two levels of data are used to evaluate the region’s housing stock: municipal and block. At the municipal level, data is regionally aggregated to allow for inside/outside the Pinelands and state analysis. Additionally, data at the municipal level is available back to 1990. At the block level, data is aggregated for 2000 and 2010 to allow for a more precise inside/outside the Pinelands Area boundary analysis.

Findings: Over the past two decades, southern New Jersey has accounted for a little less than a third of the state’s housing stock. However, housing in the Pinelands municipalities is growing at a faster rate than that of the Non-Pinelands.



At the Municipal Level

In 1990, the Pinelands municipalities accounted for 7% of the state’s total housing units. The 2010 Census reported that the number of homes in Pinelands municipalities grew by about 71,000 units to about 290,529 (an increase of 32% from 1990). This increase in the number of homes in the Pinelands municipalities increases the overall share of state housing units to 8%. In the Non-Pinelands municipalities, the share of New Jersey homes stayed about the same over the period from 1990 to 2010 at 22%. As of the 2010 Census, the number of housing units in the Non-Pinelands municipalities was 786,084 units; an increase of about 102,000 units. As of the 2010 census, there were 3,553,562 housing units in New Jersey.

Over the same twenty-year period, vacancy rates in the Pinelands have stayed in the area of 8% to 10% while the Non-Pinelands have remained fairly stable at about 17% to 18%. However, when seasonally vacant homes (i.e. homes for seasonal, recreational, or occasional use) are removed from the vacant totals, the difference in the vacancy rate is dramatic. The 2010 non-seasonal vacancy rate in the Pinelands was 5% and in the Non-Pinelands the rate is only 6%.

Housing Units at Municipal Level

Region	1990	2000	2010	Change 1990 - 2000	Change 2000 - 2010	Change 1990 - 2010
Pinelands	219,294	249,026	290,529	14%	17%	32%
Non-Pinelands	684,466	739,887	786,084	8%	6%	15%
State	3,075,310	3,310,275	3,553,562	8%	7%	16%

The percent of owner occupied homes in the Pinelands municipalities has not only been higher than that of the Non-Pinelands, but has also increased from 80% in 1990 to 84% in 2010. In the Non-Pinelands, it has decreased from 74% to 71% over the same period. At the state level, the owner occupied rate has remained unchanged at about 65%. The difference between the regions is possibly due to higher demands for rental units in the areas surrounding Philadelphia and New York City.

At the Census-block Level

More detailed census block-level analysis revealed that there were approximately 118,555 homes inside the Pinelands Area boundary in 2010. This represents a 16% increase from the number of homes in 2000. The Non-Pinelands area only saw an 8% increase from 2000; bringing the number of Non-Pinelands housing units to about 958,058.

Housing Units Inside/Outside the Pinelands Area Boundary

	2000	2010	Difference	% Change
Inside Boundary	102,345	118,555	16,210	16%
Outside Boundary	886,568	958,058	71,490	8%

In terms of non-seasonal vacant housing units, the areas inside and outside of the Pinelands boundary both had 2010 rates of 6%. By using unrounded rates, the areas that are inside the boundary have slightly less vacant housing (5.5%). This represents an increase of about 1 percentage point from 2000 compared to the areas outside the boundary, which stayed about the same. In 2000, 83% of the occupied units inside the Pinelands Area boundary are owner-occupied (as opposed to being rented). Outside the boundary, this rate is about 74%. These rates are unchanged according to the 2010 Census.

Pemberton Township has more homes inside the Pinelands Area boundary than any other municipality (10,527 units), followed by Egg Harbor Township and Hamilton Township, who both top 9,000 units. Of the 24 municipalities that have more than 1,000 housing units inside the Pinelands area, only one does not have a Regional Growth Area, a Town Area, or a Village Area; this is North Hanover Township, which is entirely in a Federal/Military Area. Eagleswood Township, Springfield Township, and Toms River Township are the only three municipalities to not have any homes inside the Pinelands Area boundary, while Beachwood Borough and Corbin City have only 1 and 2 units, respectively.

Table R3S

Census of Housing – In/Out of Pinelands Area Boundary

Municipality	County	Housing Units			Non-Seasonal Vacant Units		Occupied Units that are Owner-Occupied	
		Total	% In	% Out	% In	% Out	% In	% Out
Buena Borough	Atlantic	1,855	20%	80%	8%	6%	67%	58%
Buena Vista Township	Atlantic	3,008	80%	20%	6%	8%	87%	87%
Egg Harbor City	Atlantic	1,736	100%	0	8%	-	59%	-
Egg Harbor Township	Atlantic	16,347	60%	40%	4%	5%	88%	85%
Estell Manor City	Atlantic	673	93%	7%	5%	9%	94%	90%
Folsom Borough	Atlantic	717	100%	0	3%	-	88%	-
Galloway Township	Atlantic	14,132	32%	68%	5%	4%	79%	76%
Hamilton Township	Atlantic	10,196	94%	6%	6%	5%	76%	92%
Hammonton Town	Atlantic	5,715	100%	0	5%	-	69%	-
Mullica Township	Atlantic	2,360	100%	0	6%	-	87%	-
Port Republic City	Atlantic	444	8%	92%	6%	4%	85%	93%
Weymouth Township	Atlantic	1,220	78%	22%	3%	7%	95%	63%
Bass River Township	Burlington	587	82%	18%	9%	6%	81%	82%
Evesham Township	Burlington	18,303	26%	74%	3%	4%	87%	75%
Medford Lakes Borough	Burlington	1,543	100%	0	3%	-	94%	-
Medford Township	Burlington	8,652	78%	22%	3%	7%	92%	62%
New Hanover Township	Burlington	613	61%	39%	7%	4%	1%	93%
Pemberton Township	Burlington	10,749	98%	2%	7%	6%	73%	84%
Shamong Township	Burlington	2,227	100%	0	3%	-	96%	-
Southampton Township	Burlington	5,024	74%	26%	5%	5%	93%	89%
Tabernacle Township	Burlington	2,445	100%	0	2%	-	93%	-
Washington Township	Burlington	284	100%	0	6%	-	78%	-
Woodland Township	Burlington	494	100%	0	3%	-	88%	-
Wrightstown Borough	Burlington	348	11%	89%	5%	12%	24%	30%
Berlin Township	Camden	2,069	5%	95%	4%	5%	83%	75%
Chesilhurst Borough	Camden	621	100%	0	6%	-	81%	-
Waterford Township	Camden	3,839	100%	0	4%	-	89%	-
Winslow Township	Camden	14,560	44%	56%	5%	5%	86%	78%
Dennis Township	Cape May	2,672	23%	77%	4%	4%	87%	86%
Upper Township	Cape May	6,341	7%	93%	2%	4%	90%	90%
Woodbine Borough	Cape May	1,079	100%	0%	7%	0%	65%	100%
Maurice River Township	Cumberland	1,506	40%	60%	6%	7%	87%	88%
Franklin Township	Gloucester	6,104	16%	84%	4%	4%	92%	89%
Monroe Township	Gloucester	13,387	49%	51%	4%	4%	82%	84%
Barneгат Township	Ocean	9,085	42%	58%	4%	5%	97%	82%
Beachwood Borough	Ocean	3,826	0%	100%	0%	3%	100%	88%
Berkeley Township	Ocean	23,818	6%	94%	6%	6%	97%	88%
Eagleswood Township	Ocean	760	0%	100%	0%	6%	0%	86%
Jackson Township	Ocean	20,342	9%	91%	6%	3%	84%	87%
Lacey Township	Ocean	11,573	2%	98%	2%	4%	93%	89%
Lakehurst Borough	Ocean	943	93%	7%	6%	4%	66%	84%
Little Egg Harbor Township	Ocean	10,324	1%	99%	3%	5%	94%	84%
Manchester Township	Ocean	25,886	31%	69%	11%	8%	89%	89%
Ocean Township	Ocean	4,291	1%	99%	4%	5%	92%	89%
Plumsted Township	Ocean	3,067	6%	94%	2%	4%	87%	87%
South Toms River Borough	Ocean	1,160	69%	31%	3%	9%	87%	65%
Stafford Township	Ocean	13,604	43%	57%	4%	4%	92%	85%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>								
Corbin City	Atlantic	212	1%	99%	0%	9%	100%	87%
North Hanover Township	Burlington	3,370	42%	58%	35%	4%	1%	76%
Springfield Township	Burlington	1,217	0%	100%	0%	4%	0%	91%
Berlin Borough	Camden	2,949	1%	99%	7%	5%	81%	81%
Vineland City	Cumberland	22,661	0%	100%	0%	5%	80%	68%
Toms River Township	Ocean	43,334	0%	100%	0%	4%	0%	82%

E1 Per Capita Income

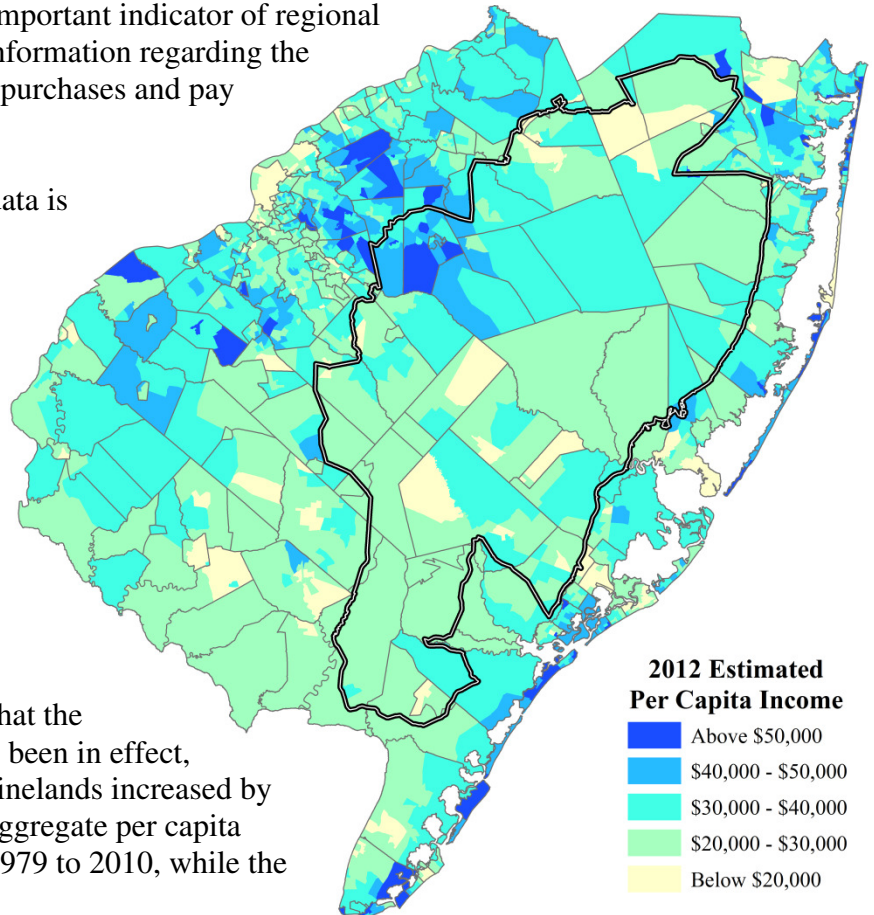
N.J. Department of Labor 1979, 1989, 1999, 2010/ESRI Data 2012
Last Updated for 2013 LTEM with 2012 data

Estimates, for 2012, show a decrease in per capita income across all three regions. The Pinelands per capita income fell by 5% from 2010, while the Non-Pinelands and state fell by an estimated 6% and 8%, respectively.

Description: Per capita income is an important indicator of regional economic health because it provides information regarding the ability of a region's residents to make purchases and pay taxes.

Unit of Analysis: Per capita income data is compiled at the municipal level and regionally aggregated and averaged to allow for inside/outside the Pinelands and statewide analysis. ESRI estimates at the block group scale are also available for 2012 to analyze regional differences in finer detail than that allowed by aggregated municipal data. Unless otherwise noted, the dollar amounts below are adjusted for inflation to 2012 dollars.

Findings: For the first three decades that the Comprehensive Management Plan has been in effect, the average per capita income in the Pinelands increased by 52%. The Non-Pinelands municipal aggregate per capita income average increased 47% from 1979 to 2010, while the state as a whole increased 43%.



Despite its higher percentage growth, the Pinelands still has the lowest average municipal per capita income. Starting at \$20,160 in 1979, the Pinelands posted a per capita income of \$30,743 in 2010. Likewise, the state grew from \$25,701 to \$36,702 and the Non-Pinelands grew from \$23,584 to \$34,577 during the same time frame.

Up to this point (2010), the state is the only entity of the three regions of interest to experience a *decrease* in per capita income over a ten-year period. From 1999 to 2010, the state's per capita income fell \$515 (down 1%) while the Pinelands and the Non-Pinelands grew by \$1,155 (4%) and \$781 (2%), respectively.

Recent estimates for 2012 show a decrease for the entire state, including the Pinelands and the Non-Pinelands. According to these estimates, the state's per capita income fell by 8% from 2010 to 2012, the Non-Pinelands fell by 6%, and the Pinelands fell by 5%. However, five-year estimates for 2017 (not shown here) suggest that all three regions will show growth in the coming years; the state and the Non-Pinelands are predicted to have growth of around \$5,000, while the Pinelands is predicted to grow by about \$4,000.

At the finer block group-level scale, the 2012 estimated per capita income average in the Pinelands is \$29,600. The Non-Pinelands have an estimated per capita income average of about \$30,500. In 2017, per capita incomes are estimated to rise by about 13% in the Pinelands and 14% in the Non-Pinelands. These numbers closely match the aggregated 2012 municipal estimates as seen described in the chart below.

Per Capita Income

Region	1979	1989	1999	2010	2012 Estimate	% Change 2010 - 2012	% Change 1979 - 2012
Pinelands	\$20,160	\$27,237	\$29,588	\$30,743	\$29,176	-5%	45%
Non-Pinelands	\$23,584	\$32,684	\$33,796	\$34,577	\$32,566	-6%	38%
New Jersey	\$25,701	\$34,650	\$37,217	\$36,702	\$33,924	-8%	32%

According to the 2010 Census, Medford Lakes Borough has the highest per capita income of all Pinelands municipalities at \$51,371. The second closest in per capita income was Medford Township at \$48,356. The other municipalities topping a \$40,000 per capita income were Evesham Township, Shamong Township, and Upper Township. Among those with the lowest per capita income, New Hanover Township is the lowest at \$16,201. The remaining municipalities under \$20,000 are Maurice River Township and Woodbine Borough.

Per capita income estimates for 2012 show that 37 Pinelands municipalities experienced a decrease by an average of 10% in per capita income from 2010. The other 10 municipalities had an average increase in per capita income of about 25%. The increased estimates are heavily skewed as New Hanover Township and Maurice River Township are said to have experienced increases in excess of 80%. Spatially, the highest per capita incomes are along the western boundary of the Pinelands Area that is closest to Philadelphia.

Table E1

Per Capita Income

Municipality	County	1979	1989	1999	2010	2012 Estimate	Estimated % Change 2010 - 2012
Medford Township	Burlington	\$30,224	\$45,517	\$53,252	\$48,356	\$46,285	-4.3%
Medford Lakes Borough	Burlington	\$30,075	\$41,045	\$43,248	\$51,371	\$42,207	-17.8%
Shamong Township	Burlington	\$23,152	\$34,828	\$42,631	\$40,871	\$39,502	-3.3%
Evesham Township	Burlington	\$27,286	\$37,005	\$40,646	\$42,022	\$38,010	-9.5%
Tabernacle Township	Burlington	\$22,026	\$37,622	\$38,414	\$38,669	\$36,796	-4.8%
Port Republic City	Atlantic	\$25,511	\$32,591	\$33,583	\$38,334	\$36,128	-5.8%
Upper Township	Cape May	\$22,779	\$32,617	\$37,895	\$40,750	\$35,120	-13.8%
Woodland Township	Burlington	\$12,912	\$20,675	\$36,005	\$35,327	\$35,116	-0.6%
Jackson Township	Ocean	\$21,113	\$29,821	\$33,049	\$36,348	\$34,443	-5.2%
Ocean Township	Ocean	\$22,210	\$24,929	\$31,462	\$38,847	\$34,442	-11.3%
Southampton Township	Burlington	\$24,291	\$30,895	\$37,177	\$36,318	\$32,736	-9.9%
Manchester Township	Ocean	\$22,950	\$27,599	\$30,882	\$28,707	\$32,393	12.8%
Stafford Township	Ocean	\$21,138	\$27,085	\$35,000	\$33,367	\$31,664	-5.1%
New Hanover Township	Burlington	\$16,467	\$16,799	\$16,730	\$16,201	\$31,371	93.6%
Berkeley Township	Ocean	\$20,097	\$25,652	\$30,591	\$29,658	\$30,507	2.9%
Maurice River Township	Cumberland	\$15,335	\$18,866	\$23,622	\$16,536	\$30,394	83.8%
Galloway Township	Atlantic	\$20,907	\$30,184	\$29,007	\$25,588	\$29,912	16.9%
Plumsted Township	Ocean	\$20,138	\$27,831	\$30,915	\$33,397	\$29,842	-10.6%
Lacey Township	Ocean	\$20,913	\$27,548	\$31,884	\$33,222	\$29,330	-11.7%
Berlin Township	Camden	\$19,724	\$25,004	\$30,562	\$27,569	\$29,140	5.7%
Dennis Township	Cape May	\$19,731	\$28,331	\$29,567	\$32,161	\$28,558	-11.2%
Beachwood Borough	Ocean	\$19,525	\$26,866	\$29,281	\$29,867	\$28,376	-5.0%
Franklin Township	Gloucester	\$19,436	\$25,015	\$27,944	\$33,842	\$28,366	-16.2%
Egg Harbor Township	Atlantic	\$21,704	\$29,371	\$30,771	\$30,655	\$28,260	-7.8%
Winslow Township	Camden	\$20,075	\$25,952	\$29,290	\$29,359	\$27,713	-5.6%
Waterford Township	Camden	\$19,778	\$27,042	\$29,872	\$32,844	\$27,600	-16.0%
Estell Manor City	Atlantic	\$20,433	\$28,996	\$26,831	\$29,311	\$27,526	-6.1%
Barnegat Township	Ocean	\$18,168	\$48,091	\$26,607	\$30,737	\$27,224	-11.4%
Little Egg Harbor Township	Ocean	\$20,252	\$26,370	\$28,415	\$30,078	\$27,180	-9.6%
Washington Township	Burlington	\$17,586	\$31,932	\$19,262	\$26,121	\$27,151	3.9%
Bass River Township	Burlington	\$20,404	\$24,067	\$28,089	\$25,733	\$27,134	5.4%
Eagleswood Township	Ocean	\$16,951	\$24,311	\$28,413	\$29,624	\$27,023	-8.8%
Mullica Township	Atlantic	\$20,350	\$25,661	\$27,237	\$27,604	\$26,613	-3.6%
Folsom Borough	Atlantic	\$20,218	\$24,544	\$28,413	\$31,004	\$26,582	-14.3%
Hamilton Township	Atlantic	\$21,410	\$29,529	\$29,366	\$26,630	\$26,571	-0.2%
Monroe Township	Gloucester	\$20,028	\$25,446	\$28,235	\$29,766	\$26,411	-11.3%
Weymouth Township	Atlantic	\$19,085	\$25,087	\$26,166	\$30,384	\$26,268	-13.5%
Hammonton Town	Atlantic	\$22,482	\$28,958	\$27,409	\$27,513	\$25,434	-7.6%
Pemberton Township	Burlington	\$17,887	\$23,348	\$26,512	\$27,628	\$23,601	-14.6%
Lakehurst Borough	Ocean	\$16,568	\$19,432	\$25,344	\$28,609	\$23,225	-18.8%
Chesilhurst Borough	Camden	\$16,543	\$20,730	\$21,019	\$25,950	\$23,109	-10.9%
Buena Borough	Atlantic	\$20,480	\$22,076	\$23,038	\$24,263	\$22,957	-5.4%
Buena Vista Township	Atlantic	\$17,871	\$23,356	\$25,333	\$28,050	\$22,912	-18.3%
South Toms River Borough	Ocean	\$15,496	\$18,571	\$22,452	\$20,192	\$20,504	1.5%
Wrightstown Borough	Burlington	\$12,220	\$15,870	\$19,968	\$25,513	\$20,288	-20.5%
Woodbine Borough	Cape May	\$11,676	\$13,939	\$18,377	\$16,567	\$20,209	22.0%
Egg Harbor City	Atlantic	\$21,925	\$23,128	\$20,880	\$23,474	\$19,122	-18.5%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	\$23,418	\$34,359	\$40,409	\$39,906	\$38,340	-3.9%
Toms River Township	Ocean	\$23,076	\$32,041	\$34,467	\$35,192	\$35,415	0.6%
Berlin Borough	Camden	\$24,898	\$29,212	\$34,005	\$35,454	\$32,263	-9.0%
Corbin City	Atlantic	\$21,979	\$27,983	\$29,383	\$29,847	\$25,944	-13.1%
North Hanover Township	Burlington	\$16,954	\$20,815	\$24,227	\$31,091	\$24,493	-21.2%
Vineland City	Cumberland	\$19,459	\$24,002	\$25,904	\$25,809	\$23,278	-9.8%

E2 Unemployment

N.J. Department of Labor 1990 - 2013
Updated for 2014 LTEM with 2013 data

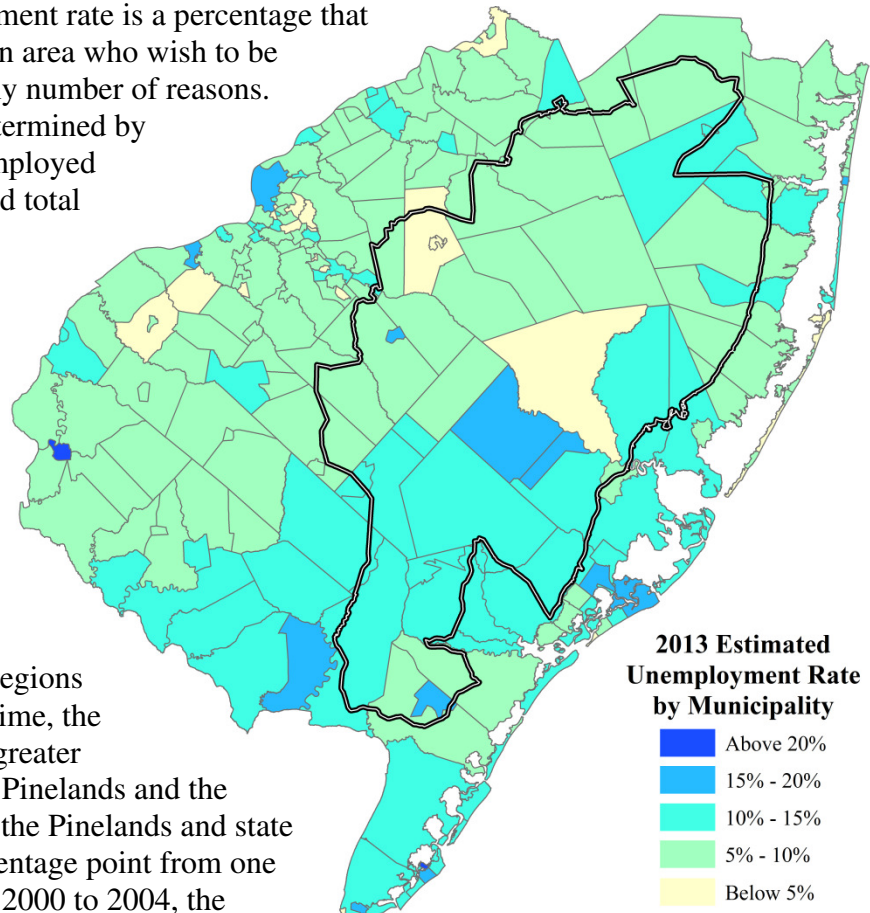
In 2013, all three regions saw a decrease in estimated unemployment rates of greater than one percentage point. The Pinelands rate fell by 1.3 points to 9.3%, while the Non-Pinelands and the state fell by 1.2 points to 9.1% and 1.1 points to 8.2%, respectively.

Description: The estimated unemployment rate is a percentage that reflects the number of people in a given area who wish to be employed, but are not employed for any number of reasons. The unemployment rate estimate is determined by dividing the estimated number of unemployed persons in a given area by the estimated total number of employed and unemployed individuals (labor force). This rate does not reflect those who are underemployed or those who were previously considered unemployed, but have stopped looking for work.

Unit of Analysis: Municipal-level data is regionally aggregated to allow for inside/outside the Pinelands and statewide analysis.¹⁶

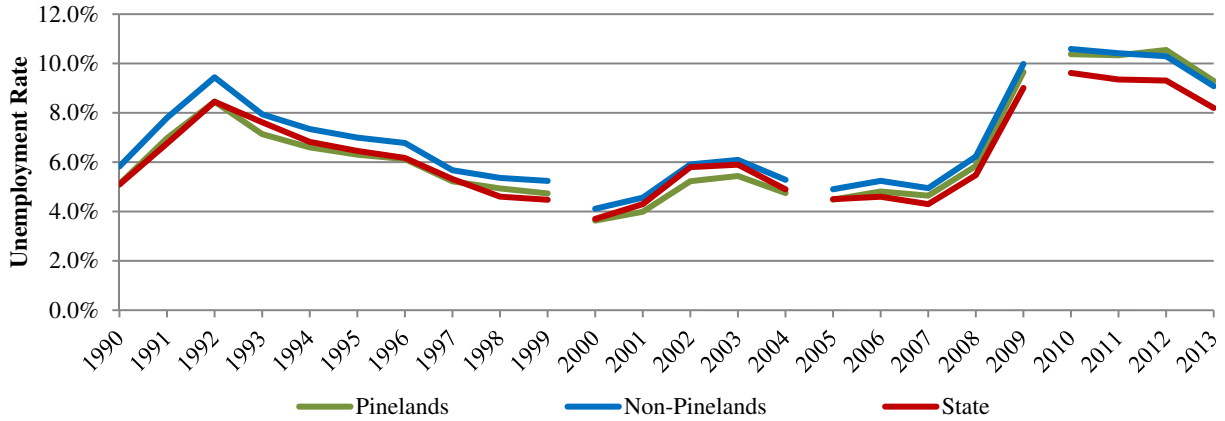
Findings: Throughout the 1990s, the regions tracked closely together. During that time, the Non-Pinelands consistently showed a greater estimated unemployment rate than the Pinelands and the state. Additionally during this period, the Pinelands and state rates were never more than half a percentage point from one another. During the next period, from 2000 to 2004, the Pinelands consistently boasted the lowest estimated rates among the three regions.

In 2008, the effects of the national recession took hold as the estimated unemployment rates across the state rose. The unemployment rates increased sharply in 2009. However, the Pinelands maintained a lower rate than that of the Non-Pinelands. The period beginning in 2010 continued to show lower rates in the Pinelands than in the Non-Pinelands. However, starting in 2012, the estimated rates in the Pinelands rose above that of the Non-Pinelands. In 2013, the Pinelands estimated unemployment rate decreased by 1.3 percentage points to 9.3%. The Non-Pinelands 2013 estimated rate fell by 1.2 points to 9.1% while the state fell by 1.1 points to 8.2%.



¹⁶ Due to changes in labor force and unemployment estimation methods, some data may exhibit significant changes from data using a different calculation method. Therefore, some timeframes are not fully comparable to each other. These timeframes are: 1990 to 1999, 2000 to 2004, 2005 to 2009, and 2010 to present.

Estimated Unemployment Rate (see footnote on prior page)



Of the individual municipalities, Egg Harbor City experienced the highest unemployment rate in 2013 at 18.4%, a 1.7 percentage-point decrease from 2012. Woodbine Borough had the second highest rate at 17.2% (a 1.6 percentage-point decrease) followed by Chesilhurst Borough and Mullica Township, both of which had rates above 15%. Notably, Berkeley Township’s rate dropped by 2.4 points to an overall rate of 12.9%, the greatest decrease of all Pinelands municipalities. Those municipalities with the lowest unemployment rates are Washington Township at 1.6% (a 0.2 percentage-point decrease from 2012), Medford Lakes Borough at 3.9%, and Medford Township at 4.2%. No Pinelands municipality experienced a rise in unemployment over 2012 rates.

Estimated Unemployment Rate - Inset (2010 – 2013)

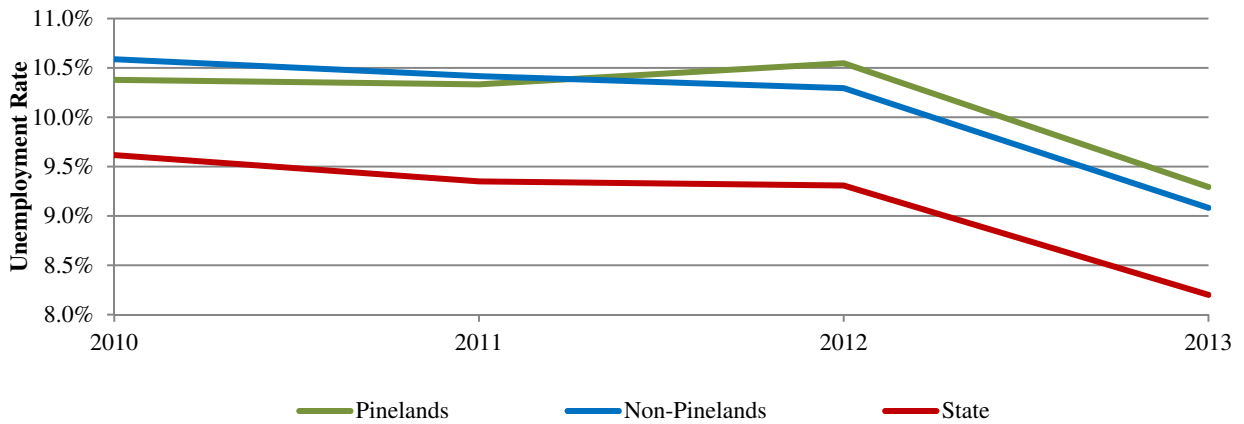


Table E2

Estimated Unemployment Rates

County	Municipality	2010	2011	2012	2013	4-Year Change (% Points)
Atlantic	Egg Harbor City	17.1%	17.6%	20.1%	18.4%	1.3%
Cape May	Woodbine Borough	23.9%	18.6%	18.8%	17.2%	-6.7%
Camden	Chesilhurst Borough	15.7%	19.3%	17.8%	15.7%	0.0%
Atlantic	Mullica Township	12.8%	15.9%	16.5%	15.2%	2.4%
Atlantic	Buena Borough	13.8%	14.9%	15.7%	14.4%	0.6%
Atlantic	Folsom Borough	11.5%	13.4%	15.7%	14.3%	2.8%
Atlantic	Estell Manor City	15.2%	13.8%	15.0%	13.7%	-1.5%
Ocean	Berkeley Township	14.6%	14.9%	15.3%	12.9%	-1.7%
Ocean	Manchester Township	14.4%	14.2%	14.3%	12.8%	-1.6%
Burlington	Bass River Township	15.5%	15.0%	13.8%	12.3%	-3.2%
Atlantic	Weymouth Township	19.2%	16.5%	13.2%	12.0%	-7.2%
Ocean	Little Egg Harbor Township	13.0%	12.9%	13.7%	11.7%	-1.3%
Ocean	Ocean Township	12.2%	13.4%	13.7%	11.6%	-0.6%
Atlantic	Hamilton Township	11.7%	11.9%	12.5%	11.5%	-0.2%
Atlantic	Egg Harbor Township	11.2%	11.6%	11.9%	10.8%	-0.4%
Atlantic	Galloway Township	11.1%	11.6%	11.9%	10.8%	-0.3%
Atlantic	Buena Vista Township	8.8%	13.5%	11.5%	10.5%	1.7%
Camden	Berlin Township	9.8%	9.4%	11.9%	10.4%	0.6%
Ocean	Lakehurst Borough	9.4%	11.9%	12.2%	10.4%	1.0%
Cumberland	Maurice River Township	14.1%	12.1%	11.3%	10.1%	-4.0%
Burlington	Pemberton Township	11.2%	10.9%	11.1%	9.7%	-1.5%
Camden	Winslow Township	11.2%	10.8%	10.7%	9.5%	-1.7%
Cape May	Upper Township	9.5%	9.2%	10.4%	9.5%	0.0%
Gloucester	Franklin Township	11.6%	12.0%	10.9%	9.5%	-2.1%
Gloucester	Monroe Township	10.9%	10.3%	10.1%	9.2%	-1.7%
Atlantic	Port Republic City	11.0%	11.3%	10.0%	9.1%	-1.9%
Camden	Waterford Township	11.2%	10.2%	10.3%	9.0%	-2.2%
Burlington	Wrightstown Borough	9.2%	8.4%	10.1%	8.9%	-0.3%
Ocean	Barneгат Township	10.1%	9.5%	10.2%	8.7%	-1.4%
Ocean	Lacey Township	10.3%	10.1%	10.1%	8.7%	-1.6%
Atlantic	Hammonton Town	12.5%	10.8%	9.2%	8.4%	-4.1%
Cape May	Dennis Township	7.2%	7.3%	9.0%	8.2%	1.0%
Ocean	Stafford Township	9.7%	9.4%	10.1%	8.1%	-1.6%
Ocean	Jackson Township	9.3%	9.0%	9.0%	7.8%	-1.5%
Ocean	South Toms River Borough	10.3%	8.9%	9.0%	7.6%	-2.7%
Burlington	New Hanover Township	9.2%	7.8%	8.3%	7.4%	-1.8%
Burlington	Shamong Township	6.0%	7.2%	8.1%	7.2%	1.2%
Ocean	Eagleswood Township	11.7%	8.7%	8.3%	7.0%	-4.7%
Ocean	Beachwood Borough	7.1%	6.7%	7.7%	6.5%	-0.6%
Ocean	Plumsted Township	8.2%	7.9%	7.7%	6.5%	-1.7%
Burlington	Evesham Township	7.1%	7.3%	7.3%	6.4%	-0.7%
Burlington	Southampton Township	4.2%	5.7%	7.3%	6.4%	2.2%
Burlington	Tabernacle Township	7.1%	6.3%	6.6%	5.8%	-1.3%
Burlington	Woodland Township	5.4%	6.2%	6.3%	5.5%	0.1%
Burlington	Medford Township	4.6%	4.1%	4.8%	4.2%	-0.4%
Burlington	Medford Lakes Borough	5.1%	3.9%	4.4%	3.9%	-1.2%
Burlington	Washington Township	1.2%	1.8%	1.8%	1.6%	0.4%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Cumberland	Vineland City	13.3%	13.3%	13.5%	12.1%	-1.2%
Atlantic	Corbin City	13.0%	13.6%	12.8%	11.6%	-1.4%
Burlington	North Hanover Township	9.8%	11.9%	11.7%	10.4%	0.6%
Ocean	Toms River Township	10.2%	9.9%	9.8%	8.6%	-1.6%
Camden	Berlin Borough	7.4%	6.5%	7.1%	6.2%	-1.2%
Burlington	Springfield Township	9.6%	7.8%	6.9%	6.1%	-3.5%

E3

Employment, Establishments, Wages

N.J. Department of Labor 2004 – 2013/ESRI Data 2012

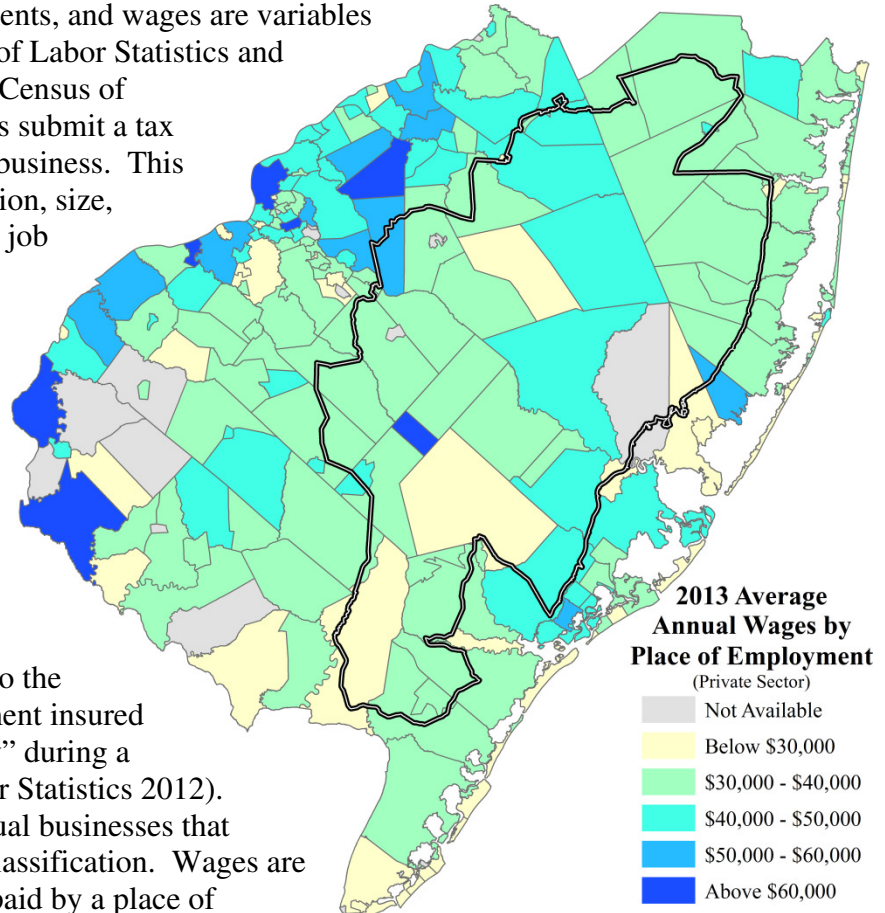
Updated for 2014 LTEM with 2013 data

The number of Pinelands establishments fell by 1% to 12,409. That is a greater decline than that of the Non-Pinelands (less than a 1% decline) and the state (slightly more than a 0% decrease).

Description: Employment, establishments, and wages are variables that are measured by the U.S. Bureau of Labor Statistics and state agencies as part of the Quarterly Census of Employment. Each quarter, employers submit a tax report containing data regarding their business. This chapter helps to describe the composition, size, strength, and location of the Pinelands job market.

Unit of Analysis: Data is broken down by industry using the North American Industrial Classification System (NAICS) and is available starting in 2004 down to the municipal level. NAICS employment data down to the block group level is available for 2012 via data purchased from the software company, ESRI. Employment refers to the

average annual number of unemployment insured people who “worked [or] received pay” during a specified period (U.S. Bureau of Labor Statistics 2012). Establishments are essentially individual businesses that specialize in, typically, one industry classification. Wages are the average amount of compensation paid by a place of employment annually. Unless otherwise noted, all dollar amounts are adjusted for inflation to 2013 dollars. Municipal level data is regionally aggregated to allow for inside/outside the Pinelands and statewide analysis. In this section, “state” refers aggregated municipal and undistributed data except where ESRI data is used.



Findings: Based on ESRI 2012 employment data by NAICS sector, public administration makes up the greatest percentage of all job sectors (15%) in the Pinelands with about 20,000 people employed. Conversely, retail trade comprised the largest percentage in the Non-Pinelands and the state (15% and 13%, respectively). Health care and social assistance make up the second largest sector for all three regions (14% in the Pinelands, 14% in the Non-Pinelands, and 13% in the state). The top four sectors in terms of employment account for 54% of the total employed workers in the Pinelands. In the Non-Pinelands, 47% of the total people employed work in the largest four sectors, and in the state as a whole, that figure is 42%. This is noteworthy because it shows the Pinelands have somewhat less employment diversity than other parts of the state.

Amongst particular industries of interest to the Pinelands, agriculture, forestry, fishing and hunting make up 0.5% of total employment in the Pinelands whereas in the Non-Pinelands and the state, it makes up 0.2% and 0.1%, respectively. Mining comprises 0.1% of Pinelands employment, while the percentage is less than 0.05% in the Non-Pinelands and the state.

2012 Employment by NAICS Sector

Based on ESRI block group data

NAICS Sector		Pinelands		Non-Pinelands		State	
		Total	%	Total	%	Total	%
11-99	Total	132,978	100%	1,012,138	100%	4,551,649	100%
11	Agriculture/Forestry/Fishing/Hunting	612	<1%	1,913	<1%	5,288	<1%
21	Mining	143	<1%	278	<1%	2,162	<1%
22	Utilities	836	1%	2,827	<1%	16,796	<1%
23	Construction	9,134	7%	51,841	5%	219,814	5%
31-33	Manufacturing	4,561	3%	58,641	6%	334,939	7%
42	Wholesale Trade	4,637	3%	38,063	4%	219,580	5%
44-45	Retail Trade	16,904	13%	146,777	15%	611,984	13%
48-49	Transportation/Warehousing	4,278	3%	24,078	2%	139,037	3%
51	Information	1,346	1%	16,538	2%	122,242	3%
52	Finance & Insurance	2,303	2%	27,437	3%	205,784	5%
53	Real Estate/Rental/Leasing	2,544	2%	30,405	3%	143,631	3%
54	Professional/Scientific/Technical Services	4,263	3%	57,048	6%	325,175	7%
55	Management of Companies & Enterprises	28	<1%	946	<1%	6,084	<1%
56	Admin/Support/Waste Mgmt/Remediation	3,848	3%	26,727	3%	154,947	3%
61	Educational Services	15,837	12%	94,886	9%	388,960	9%
62	Health Care & Social Assistance	19,183	14%	138,644	14%	579,791	13%
71	Arts, Entertainment, and Recreation	5,342	4%	72,769	7%	128,874	3%
72	Accommodation/Food Services	9,134	7%	94,365	9%	348,348	8%
81	Other Services Except Public Admin	6,584	5%	52,055	5%	248,736	5%
92	Public Admin	20,288	15%	68,763	7%	307,262	7%
99	Unclassified Establishments	1,173	1%	7,137	1%	42,215	1%

Job sectors that typically require greater amounts of higher education are lower in the Pinelands than anywhere else. For example, professional, scientific, and technical services make up 3% in the Pinelands while in the Non-Pinelands and the state, the sector comprises 6% and 7% of employment, respectively.

The construction industry makes up the largest portion of Pinelands Area businesses at 14% (approximately 1,400 businesses), with Retail Sales making up the next largest at just under 14%. The largest difference between businesses located in the Pinelands and those in the Non-Pinelands is a higher percentage of construction businesses in the Pinelands (by about 4 percentage points) while the Non-Pinelands has a greater percentage of retail trade businesses (by about 2 percentage points).

Of the businesses located in the Pinelands Area, 54% are located in Regional Growth Areas and 18% are located in Pinelands Town areas. Construction is the largest industry in the Regional Growth Areas at 15% followed by Retail Trade at 14%.

2012 Businesses by NAICS Sector

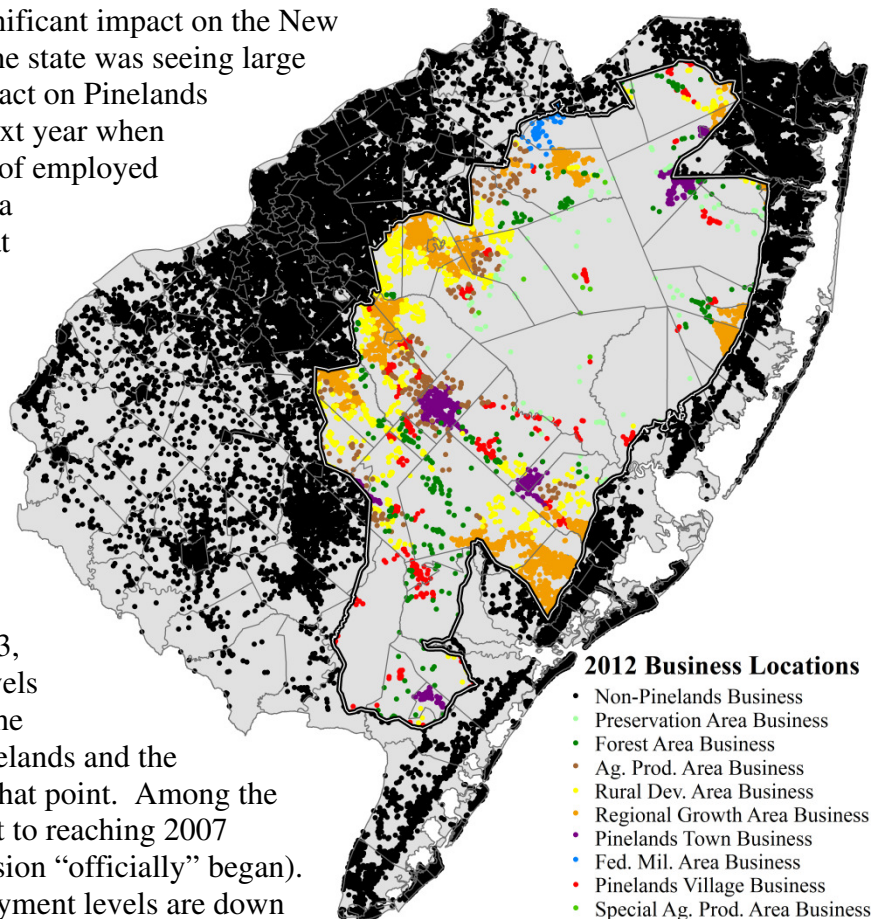
Based on ESRI business location data

NAICS Sector		Pinelands		Non-Pinelands	
		Total	% of Total	Total	% of Total
11-99	Total	9,699	100%	89,227	100%
11	Agriculture/Forestry/Fishing/Hunting	97	1%	292	0%
21	Mining	13	0%	53	0%
22	Utilities	17	0%	181	0%
23	Construction	1,371	14%	9,182	10%
31-33	Manufacturing	281	3%	2,817	3%
42	Wholesale Trade	447	5%	3,738	4%
44-45	Retail Trade	1,338	14%	13,836	16%
49-49	Transportation/Warehousing	239	2%	1,997	2%
51	Information	138	1%	1,467	2%
52	Finance/Insurance	413	4%	4,683	5%
53	Real Estate/Rental/Leasing	381	4%	4,302	5%
54	Professional/Scientific/Technical Svcs	687	7%	7,488	8%
55	Management of Companies & Enterprises	3	0%	71	0%
56	Admin/Support/Waste Mgmt/Remediation	623	6%	5,023	6%
61	Educational Services	271	3%	2,429	3%
62	Health Care & Social Assistance	789	8%	7,361	8%
71	Arts, Entertainment, and Recreation	212	2%	1,927	2%
72	Accommodation/Food Services	574	6%	6,401	7%
81	Other Services Except Public Admin	1,163	12%	10,530	12%
92	Public Admin	414	4%	3,418	4%
99	Unclassified Establishments	228	2%	2,031	2%

Private Sector Employment

The 2007 national recession had a significant impact on the New Jersey job market. While the rest of the state was seeing large drops in employment in 2008, the impact on Pinelands municipalities was not felt until the next year when employment fell by 5%. The number of employed people in Pinelands municipalities hit a recession low of 135,000 in 2010. That equates to a 6% decrease in the number of jobs from 2007. The number of employed also reached its lowest point for the state in 2010; down 6%. The Non-Pinelands' lowest employment levels occurred a year later with employment losses of almost 7%.

Recent years show a reversal in the trend for employment loss. As of 2013, the Pinelands reached employment levels exceeding those of 2004 (the start of the monitoring period) while the Non-Pinelands and the state's numbers have not yet reached that point. Among the three regions, the Pinelands are closest to reaching 2007 employment levels (the year the recession "officially" began). Relative to 2007, the Pinelands employment levels are down about 2.5% while the state is still down about 3% and the Non-Pinelands are down about 5%. In 2013, Pinelands employment numbers are still about 3,600 less than what they were in 2007.



- 2012 Business Locations**
- Non-Pinelands Business
 - Preservation Area Business
 - Forest Area Business
 - Ag. Prod. Area Business
 - Rural Dev. Area Business
 - Regional Growth Area Business
 - Pinelands Town Business
 - Fed. Mil. Area Business
 - Pinelands Village Business
 - Special Ag. Prod. Area Business

Private Sector Employment by Municipal Aggregate

Region	2009	2010	2011	2012	2013	5 Year Change
Pinelands	136,673	135,357	135,566	137,162	140,446	2.8%
Non-Pinelands	590,812	585,047	583,295	589,572	595,365	0.8%
State	3,127,499	3,107,176	3,128,003	3,151,628	3,208,738	2.6%

Among the Pinelands municipalities, Eagleswood Township saw the greatest one-year percent gains in employment by increasing 21% (151 jobs), followed by Ocean Township, Barnegat Township, and Buena Borough (each seeing gains of at least 10%). At least nine municipalities saw *decreases* in employment, with Port Republic City seeing the greatest percent loss of 64% (45 jobs). Buena Vista Township, New Hanover Township, and Woodland Township also saw losses in excess of 10%. The 2013 data for three of the municipalities – Bass River Township, Chesilhurst Borough and Medford Lakes Borough – is likely suppressed and, as a result, are not discussed here.

*Private Sector Establishments*¹⁷

The national recession also had a large impact on private sector establishments across the state. The number of establishments in the Pinelands municipalities peaked in 2006 before falling about 9% to 12,409 in 2013. Establishments in the Non-Pinelands and the state also saw losses, albeit not as severe, of 7% and 6%, respectively. This slide in establishments continued in 2013 as the Pinelands and the Non-Pinelands each declined by about 1% from 2012 while the total number of establishments state-wide declined by only one-fifth of a percent.

Regional Private Sector Establishments by Municipal Aggregate

Region	2009	2010	2011	2012	2013	5 Year Change
Pinelands	13,329	13,303	13,013	12,571	12,409	-6.9%
Non-Pinelands	42,559	42,730	41,886	41,039	40,659	-4.5%
State	258,449	259,893	257,415	250,156	249,704	-3.4%

Of the Pinelands municipalities whose data was not suppressed, 24 saw their number of establishments decline in 2013. Woodland Township experienced the largest percent decline at 11% (down 3), with Estell Manor City being the next highest with a 10% decline (down 3 establishments). Sixteen of the Pinelands municipalities saw losses of less than 5%, while five of those had losses of less than 1%. Ocean Township saw the largest gain (12%) among 14 municipalities where the number of establishments increased. Six municipalities did not see a change in the number of establishments.

Average of Private Sector Average Annual Wages

Wages have continued to decline across the state. The statewide average started to decline in 2007, at the start of the national recession. Wages in the Pinelands and the Non-Pinelands started to decline sometime in or prior to 2004 (data is only available back to 2004). All three regions saw upticks in 2010, but then continued to decline. In 2012, the Pinelands saw a brief increase of less than 1% to \$38,446, but then fell back down to \$37,728 in 2013. Average annual wages in the Non-Pinelands and the state both decreased in 2012, but then increased in 2013 by less than 1% and by 1%, respectively.

Regional Private Sector Average of Average Annual Wages by Municipal Aggregate

Region	2009	2010	2011	2012	2013	5 Year Change
Pinelands	\$39,164	\$39,532	\$38,197	\$38,446	\$37,728	-4%
Non-Pinelands	\$38,773	\$39,056	\$38,295	\$37,990	\$38,062	-2%
State	\$47,709	\$47,980	\$47,169	\$46,703	\$47,228	-1%

¹⁷ Due to data suppression, Bass River Township and Washington Township are not fully represented in the *Establishments* narrative. Please see Table E3b for details.

Of the 21 Pinelands municipalities that showed a 2013 decline in average annual wages, five declined by more than 10% while another five fell by less than 1%. The average decline was 5%. The largest decline occurred in Beachwood Borough, where average annual wages declined by 14% to \$28,769. Average annual wages increased in 23 Pinelands municipalities in 2013. Port Republic City saw the greatest increase of 28% to \$24,993 (up \$5,410). Five municipalities saw increases greater than 5% while three saw increases of less than 1%. The average increase was 4%.

Table E3a

Private Sector Employment

Municipality	County	2009	2010	2011	2012	2013	5 Year Change
Evesham Township	Burlington	23,114	22,971	22,647	23,319	24,809	7%
Egg Harbor Township	Atlantic	10,624	10,921	11,679	11,813	11,711	10%
Jackson Township	Ocean	7,971	8,445	8,474	8,811	9,071	14%
Stafford Township	Ocean	7,464	7,230	7,304	7,403	8,027	8%
Galloway Township	Atlantic	7,757	7,853	7,661	7,819	7,835	1%
Hamilton Township	Atlantic	7,404	7,276	7,383	7,208	7,434	0%
Hammonton Town	Atlantic	7,244	7,066	7,217	7,539	7,296	1%
Medford Township	Burlington	6,808	6,244	6,148	6,278	6,478	-5%
Monroe Township	Gloucester	5,395	5,432	5,397	5,518	5,542	3%
Winslow Township	Camden	4,729	4,914	4,967	5,270	5,458	15%
Lacey Township	Ocean	4,779	4,999	4,805	5,099	5,177	8%
Berlin Township	Camden	4,892	4,858	4,922	4,647	4,879	0%
Manchester Township	Ocean	3,808	3,771	3,672	3,637	3,700	-3%
Berkeley Township	Ocean	3,259	3,183	3,181	3,109	3,162	-3%
Egg Harbor City	Atlantic	2,988	2,566	2,524	2,521	2,536	-15%
Upper Township	Cape May	2,545	2,525	2,513	2,374	2,433	-4%
Southampton Township	Burlington	2,178	2,075	2,156	2,194	2,343	8%
Pemberton Township	Burlington	2,373	2,274	2,418	2,374	2,330	-2%
Barneget Township	Ocean	1,435	1,495	1,564	1,623	1,816	27%
Waterford Township	Camden	2,270	1,942	1,716	1,886	1,770	-22%
Little Egg Harbor Township	Ocean	1,559	1,540	1,585	1,607	1,745	12%
Franklin Township	Gloucester	1,731	1,592	1,497	1,542	1,597	-8%
Dennis Township	Cape May	1,625	1,602	1,629	1,488	1,547	-5%
New Hanover Township	Burlington	1,665	1,617	1,485	1,432	1,272	-24%
Ocean Township	Ocean	890	849	941	929	1,081	21%
Eagleswood Township	Ocean	865	788	705	728	879	2%
Shamong Township	Burlington	784	787	813	832	860	10%
Buena Borough	Atlantic	812	712	706	715	791	-3%
Buena Vista Township	Atlantic	1,113	1,062	964	930	777	-30%
Lakehurst Borough	Ocean	788	798	804	765	765	-3%
Plumsted Township	Ocean	694	665	696	721	737	6%
Tabernacle Township	Burlington	733	961	922	693	726	-1%
Folsom Borough	Atlantic	809	772	797	711	723	-11%
Wrightstown Borough	Burlington	592	608	614	591	609	3%
Beachwood Borough	Ocean	634	569	596	595	598	-6%
Woodbine Borough	Cape May	558	554	516	517	529	-5%
South Toms River Borough	Ocean	354	379	436	427	465	31%
Woodland Township	Burlington	321	336	278	282	250	-22%
Maurice River Township	Cumberland	203	197	202	214	223	10%
Estell Manor City	Atlantic	130	138	133	129	134	3%
Mullica Township	Atlantic	198	173	153	132	129	-35%
Weymouth Township	Atlantic	133	140	126	124	126	-6%
Washington Township	Burlington	-	72	56	49	52	-
Port Republic City	Atlantic	43	43	35	70	25	-41%
Bass River Township	Burlington	-	-	-	-	-	-
Medford Lakes Borough	Burlington	405	367	436	403	-	-
Chesilhurst Borough	Camden	-	-	95	97	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	31,747	31,475	31,066	31,324	31,885	0%
Vineland City	Cumberland	25,255	24,679	24,496	24,388	24,585	-3%
Berlin Borough	Camden	4,016	4,080	4,165	4,124	4,211	5%
North Hanover Township	Burlington	381	372	327	353	354	-7%
Springfield Township	Burlington	318	248	253	268	287	-10%
Corbin City	Atlantic	44	49	36	41	46	6%

Table E3b

Private Sector Establishments

Municipality	County	2009	2010	2011	2012	2013	5 Year Change
Evesham Township	Burlington	1,526	1,493	1,435	1,389	1,393	-9%
Jackson Township	Ocean	768	833	907	898	884	15%
Egg Harbor Township	Atlantic	893	889	887	863	845	-5%
Medford Township	Burlington	844	831	811	769	754	-11%
Stafford Township	Ocean	670	656	638	630	640	-4%
Winslow Township	Camden	614	635	622	597	592	-4%
Monroe Township	Gloucester	615	615	614	598	589	-4%
Hammontown	Atlantic	630	622	620	586	567	-10%
Lacey Township	Ocean	573	563	551	537	551	-4%
Hamilton Township	Atlantic	567	557	547	531	519	-8%
Galloway Township	Atlantic	536	552	524	502	498	-7%
Berlin Township	Camden	391	389	383	371	368	-6%
Berkeley Township	Ocean	388	392	389	368	368	-5%
Manchester Township	Ocean	280	295	294	294	301	8%
Barnegat Township	Ocean	239	251	253	255	278	16%
Upper Township	Cape May	327	315	296	288	269	-18%
Southampton Township	Burlington	265	256	247	240	236	-11%
Franklin Township	Gloucester	240	239	236	224	228	-5%
Egg Harbor City	Atlantic	243	241	225	223	225	-7%
Waterford Township	Camden	401	352	260	234	214	-47%
Little Egg Harbor Township	Ocean	226	223	219	212	214	-5%
Pemberton Township	Burlington	212	217	211	202	205	-3%
Dennis Township	Cape May	187	182	187	182	182	-3%
Tabernacle Township	Burlington	166	164	153	148	147	-11%
New Hanover Township	Burlington	102	127	135	137	125	23%
Plumsted Township	Ocean	138	137	132	126	125	-9%
Shamong Township	Burlington	131	126	125	120	122	-7%
Ocean Township	Ocean	119	118	113	104	116	-3%
Beachwood Borough	Ocean	117	112	104	102	108	-8%
Eagleswood Township	Ocean	81	84	87	87	92	14%
Lakehurst Borough	Ocean	101	98	96	91	91	-10%
Buena Borough	Atlantic	94	92	99	91	88	-6%
Woodbine Borough	Cape May	83	80	76	81	78	-6%
Wrightstown Borough	Burlington	68	68	74	72	70	3%
Buena Vista Township	Atlantic	104	100	82	74	68	-35%
South Toms River Borough	Ocean	50	58	62	59	61	22%
Folsom Borough	Atlantic	49	45	41	39	38	-22%
Mullica Township	Atlantic	34	31	32	30	30	-12%
Estell Manor City	Atlantic	34	36	34	31	28	-18%
Maurice River Township	Cumberland	32	30	28	27	27	-16%
Woodland Township	Burlington	84	65	33	27	24	-71%
Weymouth Township	Atlantic	25	27	25	23	23	-8%
Washington Township	Burlington	-	22	24	17	16	-
Port Republic City	Atlantic	15	16	15	13	12	-20%
Bass River Township	Burlington	-	-	-	-	-	-
Medford Lakes Borough	Burlington	67	69	74	65	-	-
Chesilhurst Borough	Camden	-	-	13	14	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	2,911	2,872	2,782	2,737	2,760	-5%
Vineland City	Cumberland	1,697	1,690	1,660	1,587	1,571	-7%
Berlin Borough	Camden	385	392	377	361	350	-9%
North Hanover Township	Burlington	75	72	59	63	70	-7%
Springfield Township	Burlington	58	58	53	44	45	-22%
Corbin City	Atlantic	10	11	11	11	12	20%

Table E3c

Private Sector Average Annual Wages

Municipality	County	2009	2010	2011	2012	2013	5 Year Change
Folsom Borough	Atlantic	\$73,857	\$74,586	\$70,305	\$71,986	\$75,450	2%
Eagleswood Township	Ocean	\$61,196	\$55,960	\$53,246	\$65,240	\$58,072	-5%
Evesham Township	Burlington	\$56,477	\$56,399	\$55,189	\$53,715	\$51,145	-9%
Pemberton Township	Burlington	\$46,564	\$46,384	\$48,765	\$47,071	\$47,593	2%
Egg Harbor Township	Atlantic	\$45,413	\$45,762	\$46,465	\$46,222	\$46,567	3%
Lakehurst Borough	Ocean	\$47,004	\$47,538	\$47,138	\$46,999	\$46,436	-1%
Woodland Township	Burlington	\$34,935	\$46,100	\$42,977	\$42,582	\$44,300	27%
Buena Borough	Atlantic	\$44,686	\$44,847	\$43,213	\$44,512	\$44,223	-1%
Washington Township	Burlington	-	\$49,804	\$42,955	\$51,264	\$44,153	-
New Hanover Township	Burlington	\$40,691	\$38,568	\$37,838	\$40,505	\$43,628	7%
Galloway Township	Atlantic	\$41,599	\$41,751	\$42,574	\$41,234	\$42,126	1%
Weymouth Township	Atlantic	\$42,897	\$43,413	\$38,843	\$45,424	\$39,992	-7%
Lacey Township	Ocean	\$42,664	\$44,776	\$43,906	\$42,462	\$39,817	-7%
Woodbine Borough	Cape May	\$39,731	\$40,512	\$41,191	\$38,834	\$38,594	-3%
Franklin Township	Gloucester	\$37,167	\$37,340	\$37,808	\$37,051	\$38,485	4%
Hammonton Town	Atlantic	\$37,842	\$38,269	\$38,894	\$37,981	\$38,385	1%
Buena Vista Township	Atlantic	\$45,217	\$46,005	\$43,704	\$42,736	\$38,219	-15%
Berlin Township	Camden	\$37,940	\$39,857	\$37,576	\$38,296	\$38,083	< 1%
Shamong Township	Burlington	\$41,533	\$40,117	\$37,894	\$37,060	\$37,928	-9%
Medford Township	Burlington	\$39,252	\$39,597	\$38,333	\$37,598	\$37,459	-5%
Stafford Township	Ocean	\$35,295	\$34,625	\$34,361	\$34,576	\$37,303	6%
Southampton Township	Burlington	\$37,165	\$38,252	\$37,563	\$36,767	\$36,902	-1%
Barneget Township	Ocean	\$29,551	\$32,580	\$31,991	\$36,077	\$36,488	23%
Upper Township	Cape May	\$39,749	\$41,804	\$37,762	\$37,699	\$36,127	-9%
Dennis Township	Cape May	\$36,239	\$37,143	\$34,561	\$35,745	\$35,550	-2%
Monroe Township	Gloucester	\$34,984	\$35,575	\$37,222	\$35,434	\$34,278	-2%
Winslow Township	Camden	\$34,822	\$32,745	\$31,556	\$33,347	\$33,703	-3%
South Toms River Borough	Ocean	\$39,825	\$38,756	\$33,824	\$33,292	\$33,473	-16%
Berkeley Township	Ocean	\$33,643	\$33,912	\$32,893	\$33,118	\$33,466	-1%
Manchester Township	Ocean	\$34,628	\$32,567	\$32,607	\$33,289	\$32,841	-5%
Wrightstown Borough	Burlington	\$32,611	\$34,221	\$32,530	\$32,067	\$32,602	< 1%
Estell Manor City	Atlantic	\$40,034	\$39,094	\$36,798	\$35,428	\$31,909	-20%
Ocean Township	Ocean	\$30,022	\$27,703	\$27,395	\$29,682	\$31,560	5%
Egg Harbor City	Atlantic	\$37,894	\$36,729	\$34,021	\$32,925	\$31,224	-18%
Plumsted Township	Ocean	\$28,971	\$30,230	\$30,143	\$31,299	\$30,853	6%
Waterford Township	Camden	\$33,341	\$34,235	\$33,535	\$29,859	\$30,737	-8%
Mullica Township	Atlantic	\$32,072	\$30,501	\$31,611	\$26,977	\$30,243	-6%
Jackson Township	Ocean	\$29,711	\$29,400	\$29,035	\$28,858	\$30,236	2%
Little Egg Harbor Township	Ocean	\$29,074	\$29,166	\$29,473	\$29,177	\$29,608	2%
Tabernacle Township	Burlington	\$35,699	\$31,624	\$30,729	\$31,794	\$29,493	-17%
Maurice River Township	Cumberland	\$30,232	\$28,981	\$28,275	\$28,454	\$28,868	-5%
Beachwood Borough	Ocean	\$36,062	\$37,089	\$34,472	\$33,626	\$28,769	-20%
Hamilton Township	Atlantic	\$29,667	\$29,572	\$29,332	\$29,019	\$28,165	-5%
Port Republic City	Atlantic	\$23,031	\$21,000	\$21,964	\$19,583	\$24,993	9%
Bass River Township	Burlington	-	-	-	-	-	-
Medford Lakes Borough	Burlington	\$62,218	\$63,835	\$53,109	\$52,819	-	-
Chesilhurst Borough	Camden	-	-	\$41,473	\$38,835	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	\$49,182	\$52,170	\$72,057	\$62,474	\$49,134	> -1%
North Hanover Township	Burlington	\$50,560	\$49,150	\$46,922	\$43,688	\$44,018	-13%
Toms River Township	Ocean	\$41,324	\$41,049	\$40,164	\$39,798	\$39,477	-4%
Vineland City	Cumberland	\$42,241	\$42,152	\$40,999	\$39,971	\$39,429	-7%
Berlin Borough	Camden	\$40,581	\$39,205	\$38,679	\$39,329	\$39,304	-3%
Corbin City	Atlantic	\$21,803	\$19,925	\$21,362	\$18,539	\$18,080	-17%

E4

Retail Sales, Establishments

U.S. Census Bureau 1997, 2002, 2007

Last Updated with 2007 data

From 1997 to 2007, per capita retail sales growth was stronger in the Pinelands economic places than in the rest of New Jersey.

Region	1997 Per Capita Sales	2002 Per Capita Sales	2007 Per Capita Sales	5 Year Change 2002 - 2007	10 Year Change 1997 - 2007
State	\$12,818	\$13,766	\$14,383	4%	12%
Pinelands	\$9,655	\$11,211	\$11,794	5%	22%
Non-Pinelands	\$14,390	\$14,628	\$15,244	4%	6%

Description: The survey of retail trade is part of the larger U.S. Economic Census that is conducted every five years. Retail trade, as defined by the Census Bureau (2012), is “comprise[d] of establishments engaged in retailing merchandise... and rendering services identical to the sale of merchandise.” Retail trade distributes products/services to end-users and can be classified as store based or non-store based (such as retail through catalogs, door-to-door sales, etc.). (U.S. Census Bureau 2012)

Please note that, while reviewing this section, the data here is both pre-recession and pre-Hurricane Sandy. Both of these events have had economic impacts on the entire state that will not be reflected until later versions of the Census are released. An update to the Census’s data is expected to be released sometime in 2015.

Unit of Analysis: Retail sales data is obtained at three geographic scales: state, county, and economic place. According to the U.S. Census Bureau (2012), an economic place has a population of at least 5,000 and at least 5,000 jobs.¹⁸ The economic places the Long-Term Economic Monitoring Program is concerned with largely mirror that of existing municipal boundaries. Because not all municipalities in New Jersey qualify as economic places, only the ones available will be analyzed¹⁹. Sales data for the state and each county/place is analyzed on a per-capita basis. All dollar amounts have been adjusted for inflation to 2007 dollars.²⁰

Findings: Per capita retail trade figures have mostly shown growth over the ten-year period between 1997 and 2007. The Pinelands economic places in particular have shown the greatest amount of growth at 22% compared with the next highest, the state, at 12%. Meanwhile, the Non-Pinelands economic places grew the least at 6%.

In the shorter term, from 2002 to 2007, the Pinelands economic places grew the greatest amount at 5%, with the state and the Non-Pinelands economic places each growing by about 4%. Southern New Jersey as a whole actually showed a *decrease* of about 2%. (Despite the increases in the economic places of the Pinelands and the Non-Pinelands, the areas of southern New Jersey that do not qualify as economic places likely resulted in the overall regional decrease.) In 2007, the number of retail establishments in the Pinelands economic places reached 1,960 (one establishment for every 330 people) while the Non-Pinelands economic places have 6,283 establishments (one store for every 246 people). This is a 13% increase in the number of Pinelands economic places retail establishments and a 3% decrease in the number of Non-Pinelands economic places retail establishments from 2002.

¹⁸ The definition of an economic place as defined by the U.S. Census Bureau (2012) may change from year-to-year. Starting with the 2012 Economic Census, place requirements for population and jobs will drop from at least 5,000 to 2,500.

¹⁹ 23 Pinelands municipalities were considered economic places in 2002 and 32 were considered economic places in 2007.

²⁰ Dollar amounts are adjusted for inflation to 2007 dollars due to 2007 being the latest year of available data.

At the county level, Cape May County showed the most growth over the ten-year period between 1997 and 2007 at 28%. However, most of this growth took place between the first half of the period from 1997 to 2002, when per capita sales increased just under \$3,000 as opposed to a per capita increase of \$549 between 2002 and 2007. Gloucester and Atlantic counties had the next highest growth at 19% and 18%, respectively.

County	1997 Per Capita Sales	2002 Per Capita Sales	2007 Per Capita Sales	5 Year Change 2002 - 2007	10 Year Change 1997 - 2007
Atlantic	\$13,744	\$14,717	\$16,266	11%	18%
Burlington	\$13,578	\$19,994	\$15,652	-22%	15%
Camden	\$11,807	\$10,887	\$11,410	5%	-3%
Cape May	\$12,678	\$15,675	\$16,224	4%	28%
Cumberland	\$11,242	\$11,884	\$12,640	6%	12%
Gloucester	\$12,826	\$14,517	\$15,321	6%	19%
Ocean	\$12,662	\$12,416	\$12,925	4%	2%
Salem	\$7,946	\$9,710	\$10,164	5%	28%

Camden County, while showing slow growth of 5% from 2002 to 2007, actually declined 3% over the full ten years. This decline represents a difference of \$349 per capita between 1997 and 2007. Unlike Camden County (which is slightly down despite recent growth), Burlington County has shown growth over the full ten years while exhibiting a more recent decline. Burlington County's per capita sales from 1997 to 2002 increased by \$6,417 (47%) and then proceeded to drop \$4,343 (22%) the following five years.

County	1997 Establishments	2002 Establishments	2007 Establishments	5 Year Change 2002 - 2007	10 Year Change 1997 - 2007
Atlantic	1,258	1,182	1,291	9%	3%
Burlington	1,570	1,555	1,594	3%	2%
Camden	2,052	1,959	1,911	-2%	-7%
Cape May	784	772	746	-3%	-5%
Cumberland	578	553	564	2%	-2%
Gloucester	989	965	989	2%	0.0%
Ocean	1,923	1,978	1,984	< 1%	3%
Salem	226	216	197	-9%	-13%

The number of establishments in five of the eight southern New Jersey counties increased from 2002 to 2007. Atlantic County saw the greatest gains of 9%. Burlington County saw gains of 3% (the next greatest percent increase). Cape May County lost 3% of its establishments while Salem County, the only southern county without any land in the Pinelands, saw the greatest decline of 9%.

E5

Assessed Farmland Acreage

N.J. Department of the Treasury, Division of Taxation 2009 – 2013

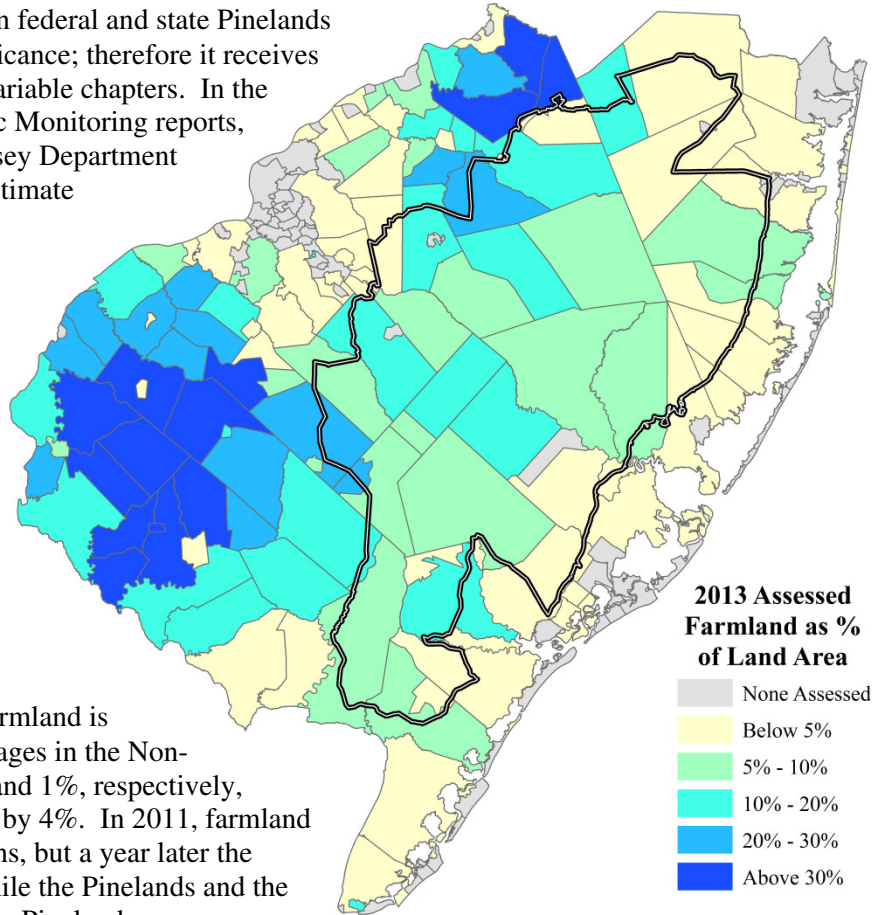
Updated for 2014 LTEM with 2013 data

While the trend of declining assessed farmland acreage continues across the state in 2013, the Pinelands experienced a slight increase of 20 acres. This brings the total tax assessed farmland acreage in the Pinelands to 174,274.

Description: Agriculture is recognized in federal and state Pinelands legislation as an industry of special significance; therefore it receives a detailed examination in the next three variable chapters. In the preparation of prior Long-Term Economic Monitoring reports, acreage reports generated by the New Jersey Department of Agriculture were used in an effort to estimate farmland acreage in each Pinelands municipality. Due to discrepancies between data from the Department of Agriculture and tax data, the past and current data is now sourced directly from the New Jersey Division of Taxation, which calculates farmland acreage directly from FA-1 tax forms.

Unit of Analysis: Municipal-level data is regionally aggregated to allow for inside/outside the Pinelands and statewide analysis.

Findings: The amount of tax assessed farmland is decreasing across the state. In 2010, acreages in the Non-Pinelands and the state decreased by 4% and 1%, respectively, while acreages in the Pinelands increased by 4%. In 2011, farmland assessed acreages fell in all three regions, but a year later the Non-Pinelands saw very slight growth while the Pinelands and the state both saw slight declines. In 2013, the Pinelands saw farmland assessed acreages increase by 20 acres (less than 1%) to 174,274 while the Non-Pinelands and the state acreages both declined by 1% to 284,224 and 967,795, respectively.



When investigated at the municipal level, Franklin Township (with 12,826 assessed farmland acres in 2013) has more assessed farmland acreage than any other Pinelands municipality and also had the greatest 2013 increase at 48%. Barnegat Township, Egg Harbor Township, Buena Vista Township, and Dennis Township are the only other Pinelands municipalities to increase their acreages by more than 10%. Seventeen municipalities saw increases in the amount of assessed farmland at an average of about 8%. At the other end, 20 Pinelands municipalities saw decreases in 2013, with an average loss of 12%. Of those losing acreage, Eagleswood Township and Woodland Township saw losses greater than 10% while Berlin Township and Galloway Township lost 68% and 78% of their farmland assessed land from 2012.

Index of Assessed Farmland Acreage by Year

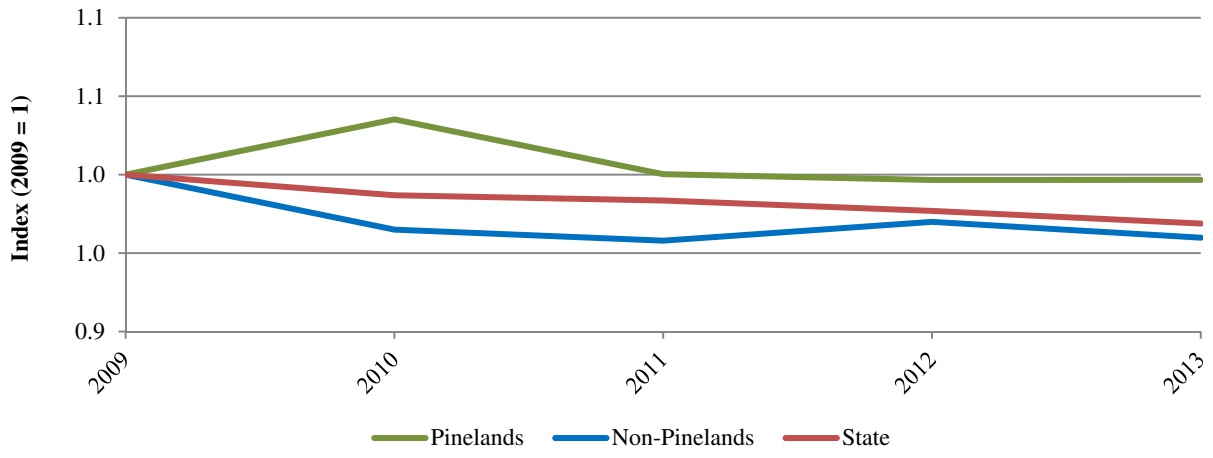


Table E5

Farmland Assessed Acreage

Municipality	County	2009	2010	2011	2012	2013	5 Year Change	5 Year % Change
Franklin Township	Gloucester	13,844	13,346	13,184	8,676	12,826	-1,018	-7.4%
Southampton Township	Burlington	13,835	11,989	12,257	12,654	12,492	-1,343	-9.7%
Pemberton Township	Burlington	10,380	9,003	10,593	9,833	10,652	272	2.6%
Estell Manor City	Atlantic	9,540	7,178	9,524	9,647	9,700	160	1.7%
Tabernacle Township	Burlington	7,125	9,422	9,836	9,544	9,663	2,538	35.6%
Maurice River Township	Cumberland	9,400	9,276	9,347	9,736	9,550	150	1.6%
Woodland Township	Burlington	1,735	15,076	11,708	11,371	8,410	6,675	384.7%
Washington Township	Burlington	8,401	8,192	8,211	8,446	8,153	-248	-3.0%
Bass River Township	Burlington	6,865	6,845	6,949	6,878	6,959	94	1.4%
Winslow Township	Camden	7,271	6,952	6,452	6,776	6,853	-418	-5.7%
Hammonton Town	Atlantic	6,773	6,823	6,556	6,609	6,505	-268	-4.0%
Hamilton Township	Atlantic	6,438	6,243	6,379	6,368	6,331	-107	-1.7%
Lacey Township	Ocean	6,261	6,266	231	6,295	6,320	59	0.9%
Mullica Township	Atlantic	6,427	6,419	6,429	6,416	6,221	-206	-3.2%
Medford Township	Burlington	6,528	6,303	5,974	5,831	5,715	-813	-12.5%
Plumsted Township	Ocean	5,430	4,994	4,815	5,063	5,020	-410	-7.6%
Monroe Township	Gloucester	5,834	5,979	6,107	5,348	4,845	-989	-17.0%
Shamong Township	Burlington	4,982	4,583	4,656	4,456	4,696	-286	-5.7%
Dennis Township	Cape May	3,789	3,870	3,848	3,834	4,244	455	12.0%
Jackson Township	Ocean	4,424	4,284	4,432	4,259	4,124	-300	-6.8%
Buena Vista Township	Atlantic	4,009	3,910	4,041	3,641	4,098	89	2.2%
Manchester Township	Ocean	3,676	3,692	3,820	3,781	3,844	168	4.6%
Waterford Township	Camden	2,593	2,491	2,581	2,565	2,541	-52	-2.0%
Egg Harbor Township	Atlantic	2,432	2,543	2,484	2,118	2,417	-15	-0.6%
Buena Borough	Atlantic	2,200	2,254	2,339	2,305	2,308	108	4.9%
Upper Township	Cape May	2,515	2,170	2,341	2,311	2,283	-232	-9.2%
Ocean Township	Ocean	2,811	1,848	1,946	1,892	1,915	-896	-31.9%
Evesham Township	Burlington	2,570	2,591	2,343	1,354	1,326	-1,244	-48.4%
New Hanover Township	Burlington	932	814	602	892	932	0	0.0%
Folsom Borough	Atlantic	754	679	703	721	674	-80	-10.6%
Little Egg Harbor Township	Ocean	556	537	543	543	543	-13	-2.3%
Galloway Township	Atlantic	2,865	2,782	2,004	2,400	539	-2,326	-81.2%
Stafford Township	Ocean	442	450	450	450	465	23	5.2%
Woodbine Borough	Cape May	334	309	317	331	319	-15	-4.5%
Eagleswood Township	Ocean	270	270	270	287	258	-12	-4.4%
Barnegat Township	Ocean	169	192	191	192	220	51	30.2%
Port Republic City	Atlantic	148	148	148	147	136	-12	-8.1%
Berkeley Township	Ocean	88	88	88	88	88	0	0.0%
Berlin Township	Camden	173	173	173	157	50	-123	-71.1%
Wrightstown Borough	Burlington	24	24	24	24	24	0	0.0%
Weymouth Township	Atlantic	6	6	9	15	15	9	150.0%
Egg Harbor City	Atlantic	0	0	0	0	0	0	0.0%
Medford Lakes Borough	Burlington	0	0	0	0	0	0	0.0%
Chesilhurst Borough	Camden	0	0	0	0	0	0	0.0%
Beachwood Borough	Ocean	0	0	0	0	0	0	0.0%
Lakehurst Borough	Ocean	0	0	0	0	0	0	0.0%
South Toms River Borough	Ocean	0	0	0	0	0	0	0.0%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>								
Springfield Township	Burlington	11,677	11,679	11,662	11,778	11,735	58	0.5%
Vineland City	Cumberland	9,801	9,207	9,033	8,727	9,296	-505	-5.2%
North Hanover Township	Burlington	6,784	7,076	6,913	7,234	7,181	397	5.9%
Toms River Township	Ocean	295	250	284	297	307	12	4.1%
Corbin City	Atlantic	284	203	184	161	178	-106	-37.3%
Berlin Borough	Camden	65	93	93	93	93	28	43.1%

E6

Cranberry & Blueberry Production

U.S.D.A. National Ag. Statistics Service/N.J. Ag. Statistics Service 1980 - 2013

Updated for 2014 LTEM with 2013 data

Cranberry and blueberry prices dropped significantly in 2013 due to oversupply. New Jersey cranberries dropped from 55¢ per pound to 38¢ (down 32%). Likewise, the state's blueberry prices declined from \$1.59 per pound to \$1.18 (down 26%).

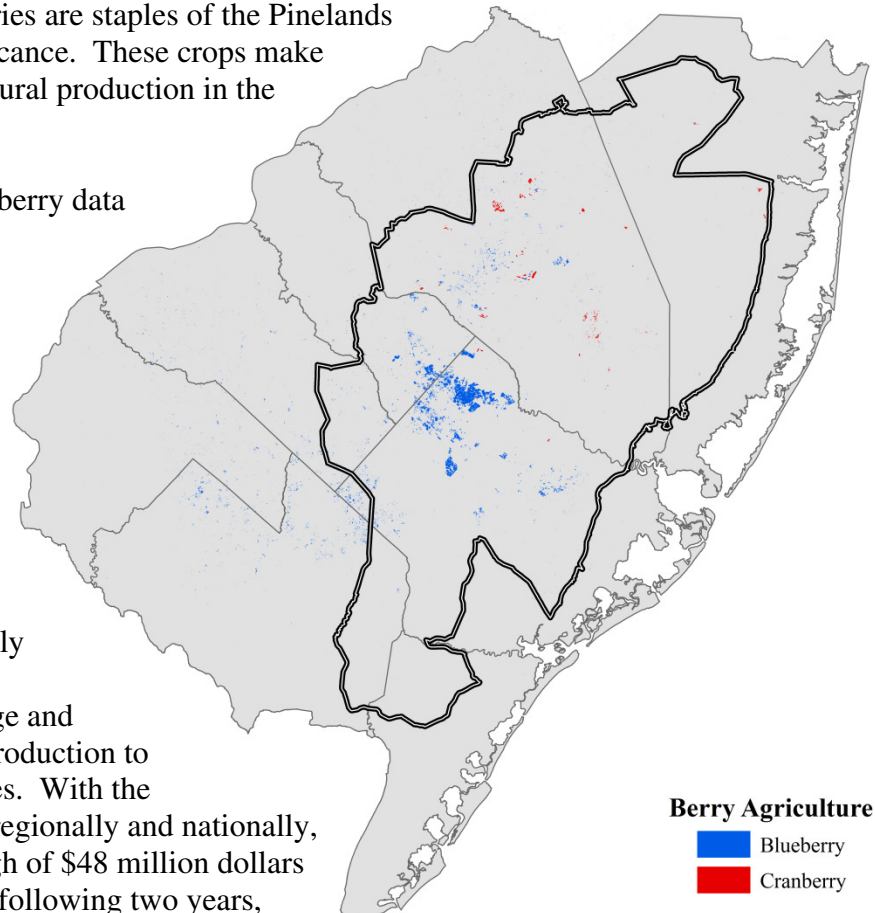
Description: Cranberries and blueberries are staples of the Pinelands for their economic and cultural significance. These crops make up a significant amount of the agricultural production in the Pinelands.

Unit of Analysis: Cranberry and blueberry data is only available at the state level. However, because these two staples are found almost exclusively in the Pinelands, statewide figures provide sufficient information for the purposes of this analysis. Unless otherwise noted, the dollar amounts below are adjusted for inflation to 2013 dollars.

Findings: New Jersey cranberry production through the 1980's and early 1990's experienced growth due to advancements in production knowledge and technology. Farmers also increased production to take advantage of high cranberry prices. With the increased supply of cranberries, both regionally and nationally, prices dropped greatly after a brief high of \$48 million dollars of utilized production in 1997. In the following two years, production value plummeted to a low of around \$10 million. After the drop, production and utilized value slowly returned to a more stable pattern. Cranberry prices per pound decreased though the 1980's and early 1990's.

In 2013, utilized production of cranberries dropped slightly while prices plummeted. The price per pound fell by 32% from 55¢ to 38¢. The drop in price can be attributed to increased worldwide cranberry production that outpaced demand (Cranberry Marketing Committee, 2014). The Cranberry Marketing Committee in conjunction with the U.S. Department of Agriculture briefly considered implementing volume control authority for the 2014 - 2015 crop year; however the action was abandoned amid concerns about the violation of Sherman Anti-Trust laws (Cranberry Marketing Committee, 2014 and Barnes, 2014). As a result, it is likely that cranberry prices will be similarly lowered in 2014.

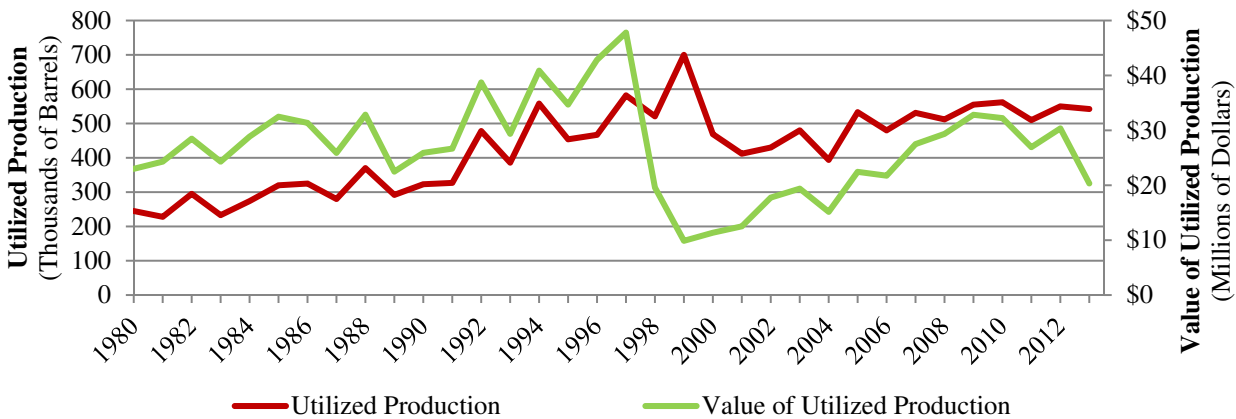
New Jersey blueberry production figures were among the top in the country for quite some time until they faced mounting pressures from growers in the south and Pacific Northwest. Due to their coinciding of growing seasons with that of New Jersey's (Naturipe, 2014), New Jersey blueberry prices suffer as a result of increased supply from the two regions.



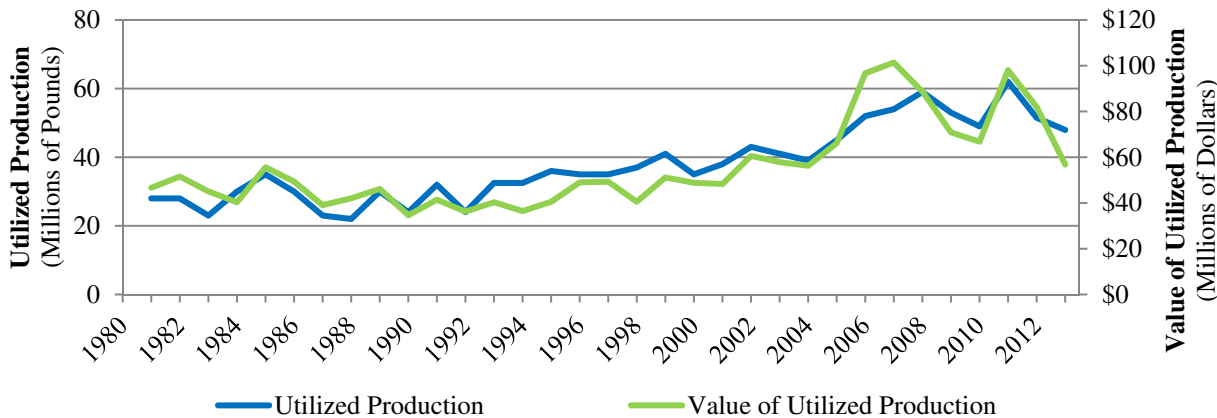
Until recently, the trend in New Jersey blueberry production and value was mostly upwards despite some volatility from year-to-year. Values of utilized production rose to a high of \$101 million in 2007 while utilized production hit its peak in 2011 to 62 million pounds. In 2012, blueberry production and value began a steep decline largely due to the mounting pressures from other growers. According to New Jersey blueberry grower Paul Galletta, in 2013 southern New Jersey experienced a late frost that resulted in a decrease in production by 7% to just under 50 million pounds (personal communication, February 23, 2015).

Despite decreased in-state production, coupled with increased domestic and international production, blueberry prices per pound fell substantially from \$1.59 per pound in 2012 to \$1.18 per pound in 2013; a decrease of 26%. Nationally, blueberry prices per pound showed volatility in 2013, falling 19%.

New Jersey Cranberry Production, Value and Volume



New Jersey Blueberry Production, Value and Volume



Cranberry and Blueberry Prices

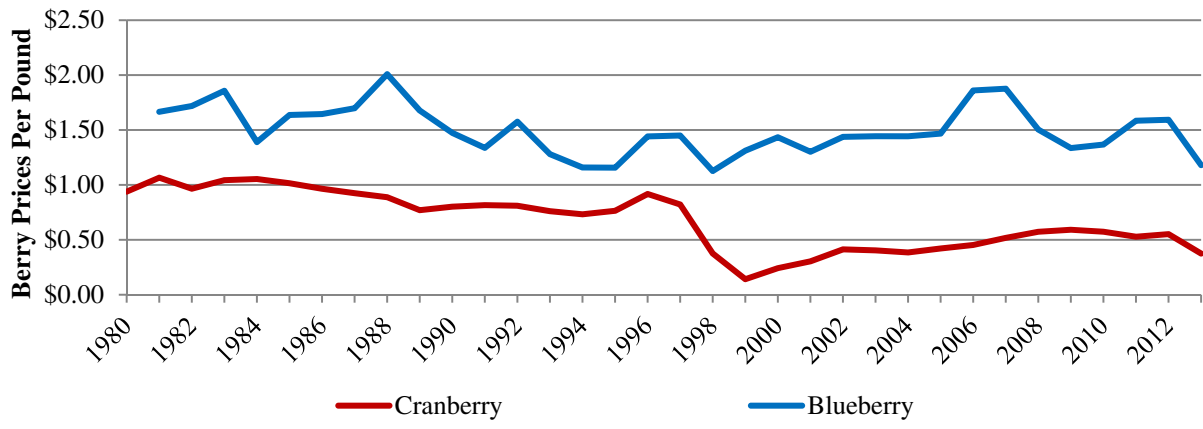


Table E6

Sales of New Jersey Cranberries and Blueberries

Year	Cranberry		Blueberry	
	Value of Production	Annual % Change	Value of Production	Annual % Change
1980	\$22,996,022	-	-	-
1981	\$24,307,999	5.7%	\$46,645,218	-
1982	\$28,485,934	17.2%	\$51,564,368	10.5%
1983	\$24,306,116	-14.7%	\$45,047,709	-12.6%
1984	\$28,874,112	18.8%	\$40,313,444	-10.5%
1985	\$32,492,738	12.5%	\$55,615,236	38.0%
1986	\$31,362,049	-3.5%	\$49,346,074	-11.3%
1987	\$25,895,959	-17.4%	\$39,071,564	-20.8%
1988	\$32,860,131	26.9%	\$42,042,536	7.6%
1989	\$22,491,623	-31.6%	\$46,140,515	9.7%
1990	\$25,906,886	15.2%	\$34,649,457	-24.9%
1991	\$26,678,879	3.0%	\$41,451,637	19.6%
1992	\$38,730,969	45.2%	\$36,230,376	-12.6%
1993	\$29,371,928	-24.2%	\$40,312,040	11.3%
1994	\$40,874,365	39.2%	\$36,476,162	-9.5%
1995	\$34,698,976	-15.1%	\$40,507,615	11.1%
1996	\$42,851,319	23.5%	\$49,011,540	21.0%
1997	\$47,812,066	11.6%	\$49,320,118	0.6%
1998	\$19,582,680	-59.0%	\$40,531,660	-17.8%
1999	\$9,885,990	-49.5%	\$51,163,845	26.2%
2000	\$11,356,992	14.9%	\$48,837,095	-4.5%
2001	\$12,518,644	10.2%	\$48,314,571	-1.1%
2002	\$17,762,486	41.9%	\$60,589,539	25.4%
2003	\$19,386,074	9.1%	\$57,846,768	-4.5%
2004	\$15,160,087	-21.8%	\$56,272,249	-2.7%
2005	\$22,442,836	48.0%	\$66,165,514	17.6%
2006	\$21,742,653	-3.1%	\$96,741,865	46.2%
2007	\$27,503,132	26.5%	\$101,388,236	4.8%
2008	\$29,361,045	6.8%	\$88,712,858	-12.5%
2009	\$32,845,073	11.9%	\$70,863,179	-20.1%
2010	\$32,241,302	-1.8%	\$66,781,662	-5.8%
2011	\$26,937,132	-16.5%	\$98,075,602	46.9%
2012	\$30,358,256	12.7%	\$81,988,599	-16.4%
2013	\$20,336,000	-33.0%	\$56,800,000	-30.7%



Census of Agriculture

U.S. Department of Agriculture 1997, 2002, 2007, 2012

Updated for 2014 LTEM with 2012 data

The 2012 Census of Agriculture shows that acreage and the number of farms continue to slide in Pinelands counties and the state as a whole. Meanwhile, the average farm size has increased, indicating a possible decline in the number of smaller Pinelands' farms.

Description: The last agricultural indicator, featured on this page, is actually a collection of indicators from the Census of Agriculture, which is taken every five years (most recently in 2012).

Unit of Analysis: Census of Agriculture data is limited to the county level and, consequently, inside/outside the Pinelands trends cannot be distinguished. Additionally, due to compatibility issues, data is limited to the years 1997, 2002, 2007, and 2012.²¹

Findings: Total farmland acreage in the Pinelands counties has continued to slide from 2007. In 1997, there were 292,676 acres of land devoted to agriculture in the Pinelands counties. Fifteen years later, this total has fallen by 13% to 255,633 acres. However, most of this decline occurred between the 2002 and 2007 Census, when acreage fell by a little less than 13%; the 2007 to 2012 decline was about 1%. The state's decline was much more drastic as the 1997 acreage fell 17% to 715,057 in 2012. The lone Non-Pinelands county, Salem, actually saw increases in farmland during all three inter-census periods.

The number of farms in Pinelands counties also declined. Of the 3,409 farms in 1997, only 2,912 exist in 2012; a decline of 15%. About 95% of the fifteen-year loss occurred between 2007 and 2012. The state, overall, also saw a 10% decrease in farms from 1997 while Salem County experienced a 15% *gain* in the number of farms. In 2012, the average farm size in the Pinelands counties was 88 acres. This figure is up from the average size of 76 acres in 2007, but still down from the 90-acre average in 2002. A similar trend occurred in the state, overall, as average farm sizes initially decreased between 2002 and 2007, but then increased in 2012. The decrease in the number of farms in conjunction with the increase in average farm size could indicate a decline in the number of smaller farms, possibly due to development or even an increase in the amount of industrial consolidated farming.

In 2012, the Pinelands counties' agricultural sales totaled about \$520 million (about 52% of the state total). In terms of 2012 net cash income, income declined by 17% from 2002 while the state sales declined by 7%. On a per farm basis, the Pineland counties' net cash income averaged to about \$37,000 while the Non-Pinelands (Salem County) had a net cash income of \$35,000 and the state as a whole had slightly less than \$20,000. In the long-term, the change in average net cash income per farm declined by 6% in the Pinelands counties while the state's average actually increased by 2%. Salem County saw its net income increase by 130% from 2002 to 2012. In 2012 1,659 (approximately 57%) Pinelands county farms saw net losses while 61% of Salem County and 62% of all New Jersey farms also had losses.

Among the individual counties, Ocean County lost 30% of its farms from 2007 to 2012 (down 77) while Cape May lost almost a quarter (a decline of 49). All the Pinelands counties saw an increase in the average size of their farms with the exception of Cumberland, which saw a decrease from 113 acres in 2007 to 111 acres in 2012 (down 2%). Ocean County saw the greatest increase in net cash income per farm (up 140% from 2007) while Cape May saw the greatest decline (down 64% from 2007), the two counties with the lowest net incomes.

²¹ In 2002, the Census of Agriculture methods for calculating data was modified leaving all prior census data as "non-comparable". However some of the 1997 census data was recalculated by the Census Bureau for use in the 2002 Census of Agriculture and is used here where available.

Table E7a

Agricultural Lands

County	Land in Farming (acres)				Percent Change	
	1997	2002	2007	2012	'97-'12	'07-'12
Atlantic	31,620	30,337	30,372	29,479	-7%	-3%
Burlington	103,627	111,237	85,790	95,899	-7%	12%
Camden	9,446	10,259	8,760	7,143	-24%	-18%
Cape May	9,840	10,037	7,976	7,352	-25%	-8%
Cumberland	67,194	71,097	69,489	64,526	-4%	-7%
Gloucester	58,888	50,753	46,662	43,265	-27%	-7%
Ocean	12,061	12,239	9,833	7,969	-34%	-19%
Pinelands	292,676	295,959	258,882	255,633	-13%	-1%
Salem	92,890	96,238	96,530	101,847	10%	6%
New Jersey	856,909	805,682	733,450	715,057	-17%	-3%

County	Number of Farms				Percent Change	
	1997	2002	2007	2012	'97-'12	'07-'12
Atlantic	465	456	499	402	-14%	-19%
Burlington	935	906	922	838	-10%	-9%
Camden	236	216	225	175	-26%	-22%
Cape May	165	197	201	152	-8%	-24%
Cumberland	622	616	615	583	-6%	-5%
Gloucester	718	692	669	584	-19%	-13%
Ocean	268	217	255	178	-34%	-30%
Pinelands	3,409	3,300	3,386	2,912	-15%	-14%
Salem	716	753	759	825	15%	9%
New Jersey	10,045	9,924	10,327	9,071	-10%	-12%

County	Average Farm Size (acres)			Percent Change	
	2002	2007	2012	'02-'12	'07-'12
Atlantic	67	61	73	9%	20%
Burlington	123	93	114	-7%	23%
Camden	47	39	41	-13%	5%
Cape May	51	40	48	-6%	20%
Cumberland	115	113	111	-3%	-2%
Gloucester	73	70	74	1%	6%
Ocean	56	39	45	-20%	15%
Pinelands	90	76	88	-2%	15%
Salem	128	127	123	-4%	-3%
New Jersey	81	71	79	-2%	11%

Table E7b

Agricultural Sales

County	Agricultural Sales (\$1,000s)				Percent Change		2012 Sales as % of NJ
	1997	2002	2007	2012	'97-'12	'07-'12	
Atlantic	\$93,321	\$100,194	\$142,112	\$125,440	34%	-12%	12%
Burlington	\$126,158	\$106,250	\$95,564	\$100,887	-20%	6%	10%
Camden	\$25,180	\$17,405	\$20,545	\$16,017	-36%	-22%	2%
Cape May	\$9,932	\$14,359	\$16,151	\$8,027	-19%	-50%	1%
Cumberland	\$137,136	\$156,558	\$173,782	\$170,362	24%	-2%	17%
Gloucester	\$96,274	\$84,243	\$103,959	\$87,690	-9%	-16%	9%
Ocean	\$11,949	\$13,690	\$12,751	\$11,550	-3%	-9%	1%
Pinelands	\$499,948	\$492,699	\$564,864	\$519,973	4%	-8%	52%
Salem	\$97,977	\$92,555	\$88,544	\$111,993	14%	26%	11%
New Jersey	\$1,011,588	\$957,010	\$1,092,798	\$1,006,936	< -1%	-8%	100%

Table E7c

Net Cash Income for New Jersey Farms

County	Net Cash Income (\$1,000s)			Percent Change		2012 Returns as % of NJ
	2002	2007	2012	'02-'12	'07-'12	
Atlantic	\$33,968	\$51,209	\$28,136	-17%	-45%	16%
Burlington	\$28,286	\$20,492	\$17,085	-40%	-17%	10%
Camden	\$4,818	\$7,592	\$5,939	23%	-22%	3%
Cape May	\$6,829	\$6,563	\$1,774	-74%	-73%	1%
Cumberland	\$41,377	\$40,868	\$27,796	-33%	-32%	16%
Gloucester	\$13,206	\$24,208	\$25,746	95%	6%	15%
Ocean	\$1,976	\$902	\$1,514	-23%	68%	1%
Pinelands	\$130,460	\$151,835	\$107,990	-17%	-29%	61%
Salem	\$11,541	\$21,051	\$29,061	152%	38%	16%
New Jersey	\$190,841	\$278,336	\$177,242	-7%	-36%	100%

Table E7d

Net Cash Income per Farm

County	Net Cash Income per Farm			Percent Change	
	2002	2007	2012	'02-'12	'07-'12
Atlantic	\$74,491	\$102,624	\$69,991	-6%	-32%
Burlington	\$31,118	\$22,226	\$20,388	-34%	-8%
Camden	\$22,411	\$33,742	\$33,939	51%	1%
Cape May	\$34,317	\$32,652	\$11,672	-66%	-64%
Cumberland	\$67,169	\$66,453	\$47,678	-29%	-28%
Gloucester	\$19,112	\$36,185	\$44,086	131%	22%
Ocean	\$9,189	\$3,537	\$8,505	-7%	140%
Pinelands	\$39,533	\$44,842	\$37,084	-6%	-17%
Salem	\$15,326	\$27,736	\$35,226	130%	27%
New Jersey	\$19,238	\$26,952	\$19,539	2%	-28%

Table E7e

Farms with Net Income Losses

County	Farms with Net Income Losses			Percent Change	
	2002	2007	2012	'02-'12	'07-'12
Atlantic	197	275	217	10%	-21%
Burlington	478	526	487	2%	-7%
Camden	108	133	107	-1%	-20%
Cape May	111	103	81	-27%	-21%
Cumberland	314	319	309	-2%	-3%
Gloucester	513	446	359	-30%	-20%
Ocean	131	156	99	-24%	-37%
Pinelands	1,852	1,958	1,659	-10%	-15%
Salem	526	461	505	-4%	10%
New Jersey	6,117	6,278	5,654	-8%	-10%

F1

Average Residential Property Tax Bill

N.J. Department of Community Affairs, Div. LGS 1998 – 2013

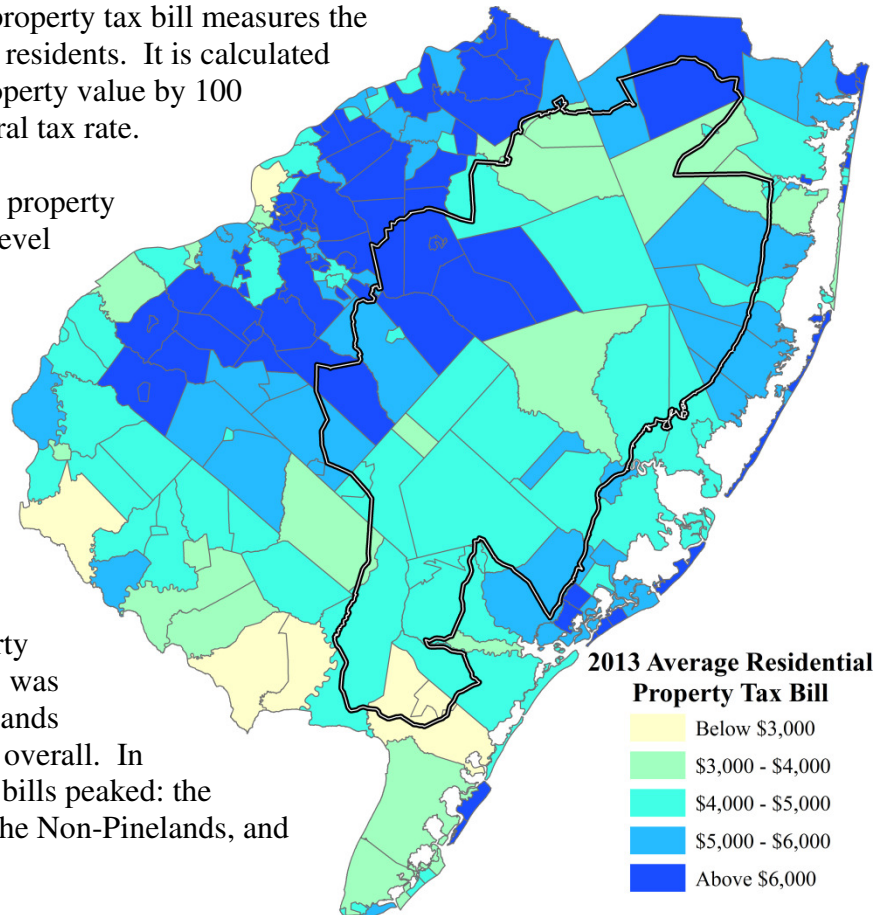
Updated for 2014 LTEM with 2013 data

The Pinelands continues to have the lowest average residential property tax bill in the state. In 2013, average residential property tax bills increased by less than 1% in the Pinelands and Non-Pinelands. The State average decreased by less than 1%.

Description: The average residential property tax bill measures the impact of property taxes on municipal residents. It is calculated by dividing the average residential property value by 100 and multiplying the result by the general tax rate.

Unit of Analysis: Average residential property tax data is compiled at the municipal level and regionally aggregated to allow for inside/outside the Pinelands and state analysis. Unless otherwise noted, all dollar amounts are adjusted for inflation to 2013 dollars.

Findings: The average residential tax bill has steadily increased across the state since the late 1990's. In 1998, the average residential property tax bill in the Pinelands municipalities was about \$3,800, \$4,200 in the Non-Pinelands municipalities, and \$5,900 in the state overall. In 2010, average residential property tax bills peaked: the Pinelands bills were up 34%, 43% in the Non-Pinelands, and 37% for the state from 1998 levels.



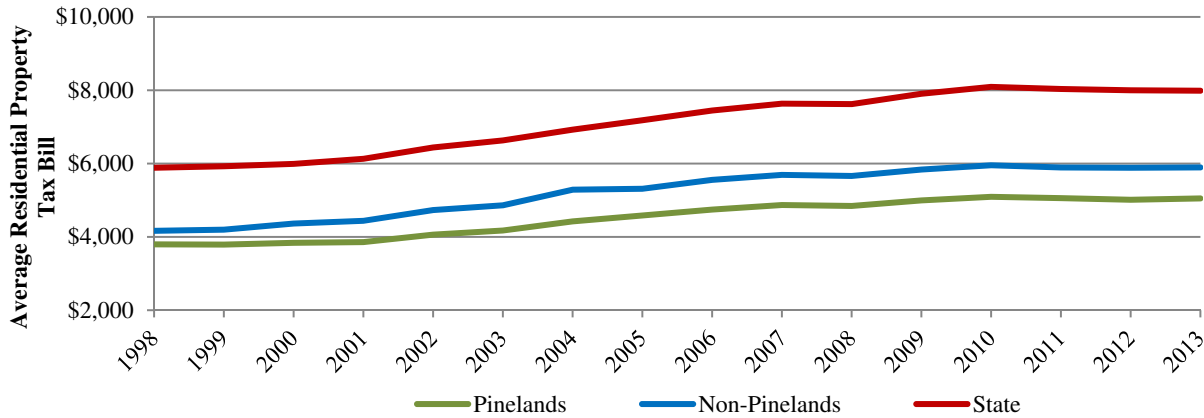
The 2013 average residential property tax bill in the Pinelands was \$5,049. In the Non-Pinelands, the average bill was about \$5,895, while the state's overall average bill was \$7,988. This is an increase from 2012's bills of less than 1% in the Pinelands and the Non-Pinelands, and a very slight decrease for the state overall. Despite the slight increase, the Pinelands municipalities have the lowest average residential property tax bill; 37% lower than that of New Jersey, overall.

Individually, 30 of the 47 municipalities with at least 10% of their land area in the Pinelands Area saw their average property tax bills grow from 2012. Of those, four grew by more than \$200, while 13 grew by less than \$100. The highest percentage increase occurred in Wrightstown Borough by 9%, which equates to a \$332 increase. Despite this increase, Wrightstown Borough still has the ninth lowest average residential tax bill of the Pinelands municipalities. The next two highest percentage growths happened in Buena Vista Township and Lacey Township at 7% and 5%, respectively (the only other two municipalities having increases greater than 5%).

On the decreasing end, 17 Pinelands municipalities saw average residential property tax bills fall; Woodland Township, Stafford Township and New Hanover Township all saw decreases of more than 5%. Stafford Township also saw the greatest absolute decrease of \$480.

Woodbine continues to have the overall lowest average residential tax bill at \$1,687 (a 4% increase over 2012), with the next lowest in Dennis Township (\$2,887). Medford Township has the largest average residential tax bill at \$9,424 while Medford Lakes Borough has the next highest at \$8,244.

Average Residential Property Tax Bill



Index of Average Residential Property Tax Bill

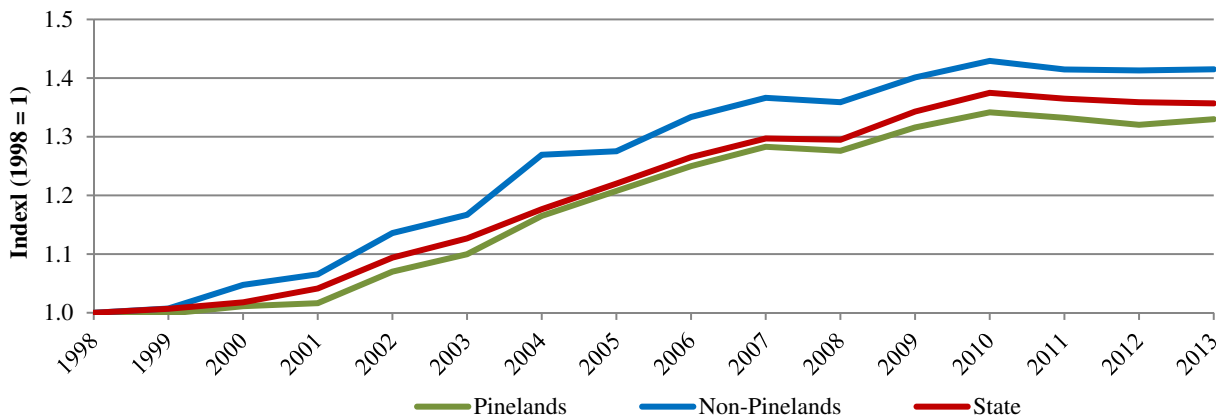


Table F1

Average Residential Property Tax Bill

Municipality	County	2012 Average Tax Bill	2013 Average Tax Bill	Actual Change 2012 - 2013	Percent Change 2012 - 2013	2013 South N.J. Rank ²²
Wrightstown Borough	Burlington	\$3,661	\$3,993	\$332	9%	174
Buena Vista Township	Atlantic	\$4,463	\$4,794	\$331	7%	129
Lacey Township	Ocean	\$4,893	\$5,149	\$256	5%	115
Buena Borough	Atlantic	\$4,671	\$4,883	\$211	5%	122
Folsom Borough	Atlantic	\$3,508	\$3,666	\$158	5%	185
Hamilton Township	Atlantic	\$4,482	\$4,676	\$194	4%	140
Lakehurst Borough	Ocean	\$4,521	\$4,708	\$186	4%	139
Weymouth Township	Atlantic	\$4,156	\$4,318	\$162	4%	158
Hammonton Town	Atlantic	\$4,791	\$4,975	\$184	4%	119
Port Republic City	Atlantic	\$5,244	\$5,442	\$198	4%	93
Woodbine Borough	Cape May	\$1,629	\$1,687	\$58	4%	200
Galloway Township	Atlantic	\$4,665	\$4,831	\$166	4%	126
Estell Manor City	Atlantic	\$3,946	\$4,069	\$124	3%	168
Mullica Township	Atlantic	\$4,616	\$4,751	\$135	3%	132
Ocean Township	Ocean	\$4,595	\$4,725	\$130	3%	135
Egg Harbor City	Atlantic	\$5,732	\$5,880	\$148	3%	79
Franklin Township	Gloucester	\$5,239	\$5,363	\$123	2%	97
Bass River Township	Burlington	\$4,358	\$4,455	\$97	2%	154
Eagleswood Township	Ocean	\$5,364	\$5,448	\$84	2%	92
Winslow Township	Camden	\$5,424	\$5,497	\$73	1%	89
Chesilhurst Borough	Camden	\$4,905	\$4,964	\$59	1%	120
Medford Township	Burlington	\$9,321	\$9,424	\$103	1%	9
Jackson Township	Ocean	\$6,577	\$6,646	\$70	1%	50
Plumsted Township	Ocean	\$5,841	\$5,901	\$60	1%	77
Berlin Township	Camden	\$5,738	\$5,775	\$37	1%	83
Beachwood Borough	Ocean	\$4,542	\$4,555	\$13	0%	145
Medford Lakes Borough	Burlington	\$8,222	\$8,244	\$22	0%	17
Dennis Township	Cape May	\$2,881	\$2,887	\$5	0%	196
Berkeley Township	Ocean	\$3,782	\$3,789	\$7	0%	179
Barneget Township	Ocean	\$5,743	\$5,749	\$6	0%	85
Monroe Township	Gloucester	\$6,514	\$6,513	\$0	0%	54
Upper Township	Cape May	\$4,513	\$4,511	-\$2	0%	147
Pemberton Township	Burlington	\$3,429	\$3,424	-\$5	0%	193
Waterford Township	Camden	\$6,352	\$6,311	-\$41	-1%	60
Egg Harbor Township	Atlantic	\$5,891	\$5,852	-\$39	-1%	80
Maurice River Township	Cumberland	\$4,192	\$4,159	-\$32	-1%	165
Washington Township	Burlington	\$3,507	\$3,466	-\$41	-1%	191
Evesham Township	Burlington	\$6,849	\$6,761	-\$88	-1%	42
Tabernacle Township	Burlington	\$6,731	\$6,643	-\$88	-1%	51
South Toms River Borough	Ocean	\$4,358	\$4,300	-\$58	-1%	160
Southampton Township	Burlington	\$4,891	\$4,814	-\$77	-2%	128
Shamong Township	Burlington	\$7,641	\$7,493	-\$148	-2%	25
Little Egg Harbor Township	Ocean	\$4,564	\$4,467	-\$96	-2%	152
Manchester Township	Ocean	\$3,798	\$3,671	-\$126	-3%	184
Woodland Township	Burlington	\$4,829	\$4,558	-\$271	-6%	144
Stafford Township	Ocean	\$5,812	\$5,333	-\$480	-8%	99
New Hanover Township	Burlington	\$4,225	\$3,793	-\$432	-10%	178
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Corbin City	Atlantic	\$3,435	\$3,478	\$43	1%	190
North Hanover Township	Burlington	\$5,864	\$5,935	\$72	1%	75
Springfield Township	Burlington	\$7,369	\$7,423	\$54	1%	29
Berlin Borough	Camden	\$6,733	\$6,733	\$0	0%	44
Vineland City	Cumberland	\$4,003	\$3,620	-\$383	-10%	186
Toms River Township	Ocean	\$5,540	\$4,629	-\$912	-16%	142

²² Rankings are out of the 202 municipalities in southern New Jersey; Rankings are ordered in descending order from highest 2013 average residential property tax bill (1) to lowest 2013 average residential property tax bill (202).

F2

State Equalized Valuation

N.J. Department of Community Affairs, Div. LGS 1998 – 2013

Updated for 2014 LTEM with 2013 data

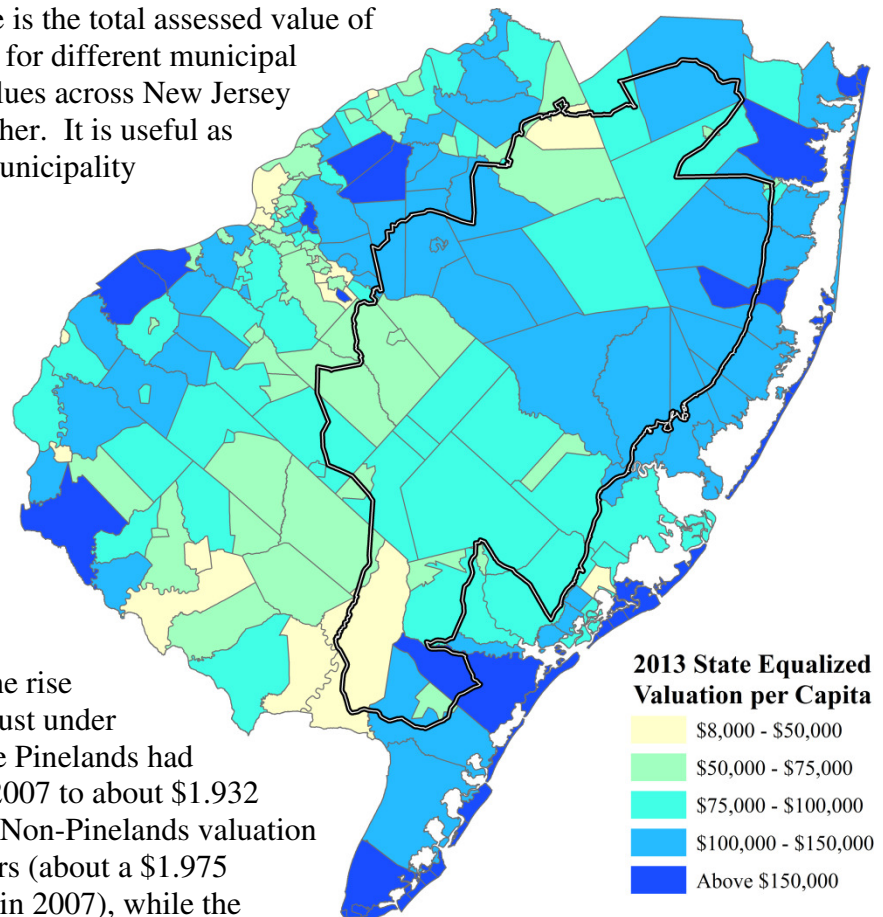
The state equalized valuation continued to decline in 2013. The average valuations in the Pinelands and the Non-Pinelands declined by about 4.5%, while the state's valuation only declined by 3.5%. The annual declines in valuation appear to be slowing across all three regions.

Description: Equalized property value is the total assessed value of all property in a municipality adjusted for different municipal assessment biases in order to make values across New Jersey municipalities comparable to one another. It is useful as a measurement of the wealth of one municipality relative to other municipalities.

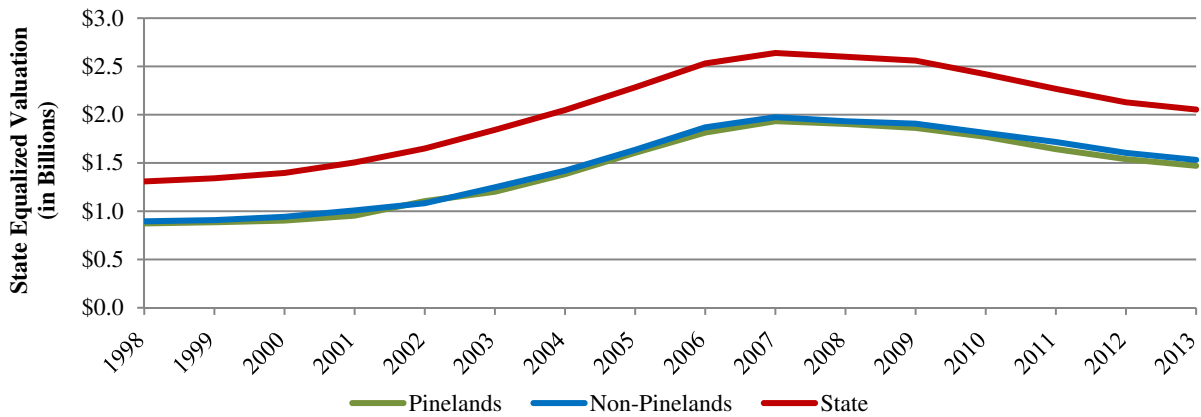
Unit of Analysis: State equalized valuation data are compiled at the municipal level and regionally aggregated to allow for inside/outside the Pinelands and state analysis. Unless otherwise noted, all dollar amounts are adjusted for inflation to 2013 dollars.

Findings: Average state equalized valuation across New Jersey was on the rise until 2007. Starting at a valuation of just under \$874 million in 1998, valuations in the Pinelands had increased by more than \$1 billion by 2007 to about \$1.932 billion. Relative to the Pinelands, the Non-Pinelands valuation was higher by about \$42 million dollars (about a \$1.975 billion average for the Non-Pinelands in 2007), while the state overall had an average valuation of \$2.639 billion. Overall, the change had amounted to increases that were 121% higher than 1998 in the Pinelands. Likewise, the Non-Pinelands saw values 120% higher than in 1998 while the state only saw valuations that were 102% higher. This shows that there was much greater valuation growth for the southern half of the state versus the northern half.

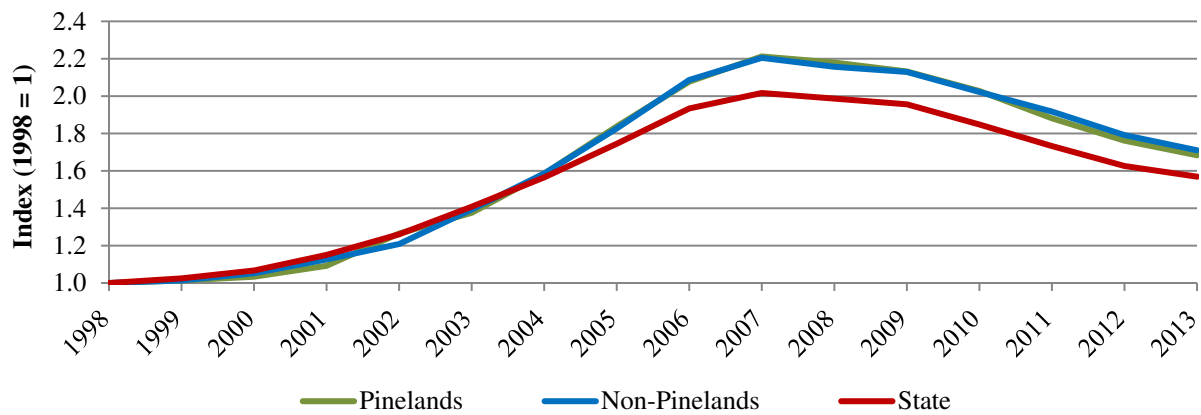
However, with the economic recession came decreased valuations. All across the state, values began to fall; slight decreases at first, followed by steeper decreases. In 2013, the average Pinelands state equalized valuation was at \$1.471 billion; a 24% decrease from the 2007 high. The Non-Pinelands and state each saw declines of about 22%, respectively, from 2007. This equates to a 2013 average state equalized valuation of \$1.532 billion in the Non-Pinelands and \$2.054 billion in the state, overall.



Average State Equalized Valuation



Index of State Equalized Valuation



Among the 47 municipalities with at least 10% of their total land in the Pinelands Area, Jackson Township’s state equalized value of \$6.492 billion is the greatest. Berkeley Township and Evesham Township are also notable, with values that top five billion dollars. At the bottom end, Wrightstown Borough had the lowest state equalized valuation at \$40 million. New Hanover Township, Chesilhurst Borough, and Washington Township are the only other Pinelands municipalities with valuations of less than \$100 million. Of the six municipalities with some land, but less than 10%, in the Pinelands Area, Toms River Township’s valuation is just over \$14 billion in 2012 (a 13% decline from 2012).

Despite the Pinelands’ overall decline in valuation, two of the 53 municipalities with any amount of land in the Pinelands Area showed an increase in state equalized valuation in 2013. Egg Harbor Township and Wrightstown Borough posted gains of 1% and 3%, respectively. Additionally, both are municipalities with at least 10% of their land in the Pinelands Area. In 2012, two municipalities had valuation decreases of more than 20%. In 2013, while no municipalities had decreases exceeding 20%, Lakehurst Borough and Woodbine Borough were the closest with declines of 15% and 18%, respectively.

Table F2

State Equalized Valuation

Municipality	County	2013 Population Estimate	2013 State Equalized Valuation	2013 Equalized Valuation per Capita
Jackson Township	Ocean	56,079	\$6,492,395,031	\$115,772
Berkeley Township	Ocean	41,829	\$5,111,473,858	\$122,199
Evesham Township	Burlington	45,644	\$5,066,238,867	\$110,995
Egg Harbor Township	Atlantic	43,872	\$4,356,232,301	\$99,294
Stafford Township	Ocean	26,941	\$3,988,828,224	\$148,058
Lacey Township	Ocean	28,021	\$3,943,711,365	\$140,741
Manchester Township	Ocean	43,342	\$3,574,202,989	\$82,465
Medford Township	Burlington	23,281	\$3,147,762,193	\$135,207
Galloway Township	Atlantic	37,646	\$3,095,211,969	\$82,219
Monroe Township	Gloucester	36,732	\$2,624,893,050	\$71,461
Winslow Township	Camden	39,165	\$2,570,042,290	\$65,621
Little Egg Harbor Township	Ocean	20,344	\$2,385,339,165	\$117,250
Hamilton Township	Atlantic	26,752	\$2,375,178,624	\$88,785
Barneget Township	Ocean	21,913	\$2,252,431,161	\$102,790
Upper Township	Cape May	12,187	\$1,923,992,260	\$157,873
Pemberton Township	Burlington	27,914	\$1,479,507,478	\$53,002
Hammonton Town	Atlantic	14,799	\$1,316,496,833	\$88,958
Ocean Township	Ocean	8,653	\$1,302,790,253	\$150,559
Franklin Township	Gloucester	16,741	\$1,286,391,798	\$76,841
Southampton Township	Burlington	10,390	\$1,085,956,876	\$104,519
Beachwood Borough	Ocean	11,172	\$879,543,909	\$78,728
Dennis Township	Cape May	6,344	\$849,929,693	\$133,974
Plumsted Township	Ocean	8,523	\$847,159,598	\$99,397
Waterford Township	Camden	10,792	\$768,654,919	\$71,225
Tabernacle Township	Burlington	6,970	\$700,256,625	\$100,467
Shamong Township	Burlington	6,444	\$698,919,172	\$108,460
Buena Vista Township	Atlantic	7,595	\$636,298,137	\$83,779
Berlin Township	Camden	5,362	\$548,871,194	\$102,363
Mullica Township	Atlantic	6,176	\$489,511,794	\$79,260
Medford Lakes Borough	Burlington	4,136	\$460,946,956	\$111,448
Maurice River Township	Cumberland	7,662	\$309,594,131	\$40,406
Buena Borough	Atlantic	4,626	\$266,092,458	\$57,521
Egg Harbor City	Atlantic	4,246	\$237,054,520	\$55,830
Eagleswood Township	Ocean	1,621	\$236,619,255	\$145,971
South Toms River Borough	Ocean	3,718	\$232,675,732	\$62,581
Folsom Borough	Atlantic	1,873	\$181,013,572	\$96,644
Bass River Township	Burlington	1,439	\$176,157,154	\$122,416
Lakehurst Borough	Ocean	2,700	\$172,555,646	\$63,909
Estell Manor City	Atlantic	1,737	\$171,562,163	\$98,769
Weymouth Township	Atlantic	2,716	\$158,615,015	\$58,400
Woodbine Borough	Cape May	2,448	\$157,302,729	\$64,258
Woodland Township	Burlington	1,797	\$136,663,353	\$76,051
Port Republic City	Atlantic	1,123	\$129,570,058	\$115,379
Washington Township	Burlington	684	\$95,616,033	\$139,790
Chesilhurst Borough	Camden	1,637	\$82,825,377	\$50,596
New Hanover Township	Burlington	7,942	\$70,881,618	\$8,925
Wrightstown Borough	Burlington	798	\$40,328,130	\$50,537
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>				
Toms River Township	Ocean	91,583	\$14,151,930,275	\$154,526
Vineland City	Cumberland	61,050	\$4,058,863,305	\$66,484
Berlin Borough	Camden	7,600	\$742,462,390	\$97,692
North Hanover Township	Burlington	7,669	\$408,918,810	\$53,321
Springfield Township	Burlington	3,407	\$399,305,460	\$117,201
Corbin City	Atlantic	493	\$51,482,795	\$104,428

F3 Effective Tax Rate

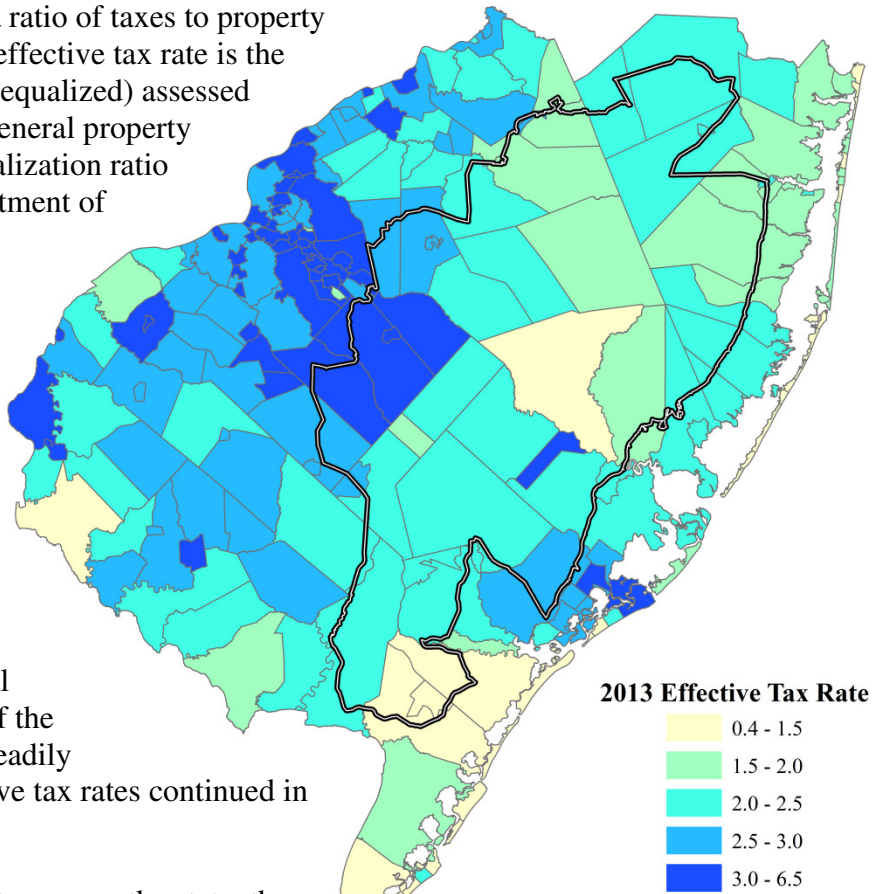
N.J. Department of the Treasury 2000 - 2013
Updated for 2014 LTEM with 2013 data

The average municipal effective tax rate continues to climb across the state in 2013. The average rate in the Pinelands and Non-Pinelands rose by 8% while the state rose by 7%. Effective tax rates in the Pinelands (2.27) remained lower than the rest of the state.

Description: The effective tax rate is a ratio of taxes to property value (expressed in hundredths). The effective tax rate is the rate at which a municipality taxes the (equalized) assessed value of property, and is equal to the general property tax adjusted by the municipality’s equalization ratio as calculated by the New Jersey Department of the Treasury, Division of Taxation.

Unit of Analysis: Average effective tax rate data is compiled at the municipal level and regionally aggregated to allow for inside/outside the Pinelands and state analysis.

Findings: Statewide, municipal effective tax rates have followed a similar trend; in the early part of the 2000’s, rates began a slow decline until bottoming out in the mid-to-late part of the decade. Since then, rates have been steadily increasing. This trend of rising effective tax rates continued in 2013.



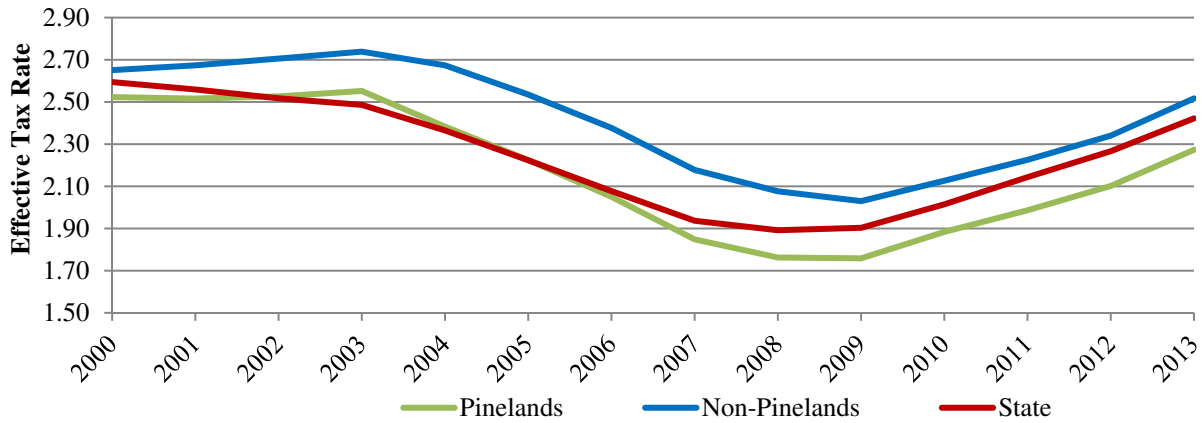
Despite the increase of effective tax rates across the state, the Pinelands average continues to be the lowest among the three regions. In 2013, rates rose 0.17 to an average of 2.27 after a slightly smaller increase (0.12) in 2012. Likewise, the Non-Pinelands and the state average effective tax rate rose 0.18 (to 2.52) and 0.16 (to 2.42), respectively.

Effective Tax Rate by Region

Region	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Pinelands	2.52	2.52	2.53	2.55	2.38	2.22	2.05	1.85	1.76	1.76	1.88	1.99	2.10	2.27
Non-Pinelands	2.65	2.67	2.71	2.74	2.67	2.54	2.38	2.18	2.08	2.03	2.13	2.23	2.34	2.52
State	2.59	2.56	2.52	2.49	2.37	2.22	2.08	1.94	1.89	1.90	2.01	2.14	2.27	2.42

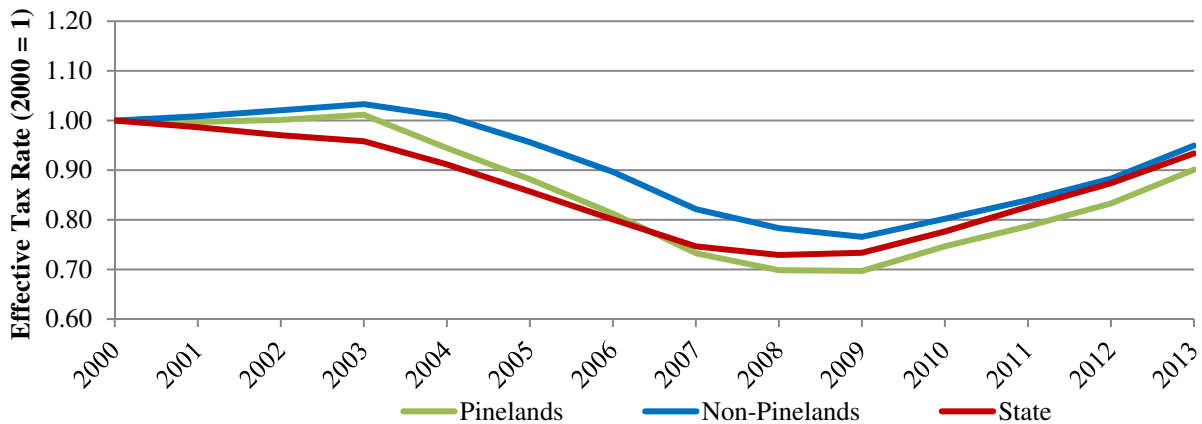
Increases in the effective tax rate are related to the decrease in property values. With property values decreasing as a result of the national recession, municipalities increasingly became unable to continue to pay for municipal services. As a result, municipalities increased their property tax rates to compensate and continue paying for services. For a greater explanation of how effective tax rates are compiled and what they mean, please see the *2003 Long-Term Economic Monitoring Report*.

Effective Tax Rate



The highest effective tax rate was found in Egg Harbor City at 3.64, which represents a 6% increase over 2012. Of all the municipalities that have land inside the Pinelands Area, 51 saw increases in their effective tax rates. The greatest percent increase was in Corbin City, which increased by 19% to 1.61, followed by Wrightstown Borough with an 18% increase and New Hanover Township, which increased by 17%. The average percent increase in rates was 9%. Washington Township and Lakehurst Borough were the only two municipalities to decrease rates, both of which declined by 4% to 1.13 and 2.01, respectively.

Index of Effective Tax Rate



Henry Coleman, of Rutgers University, suggested that a municipal effective tax rate exceeding that of 3.00 is an indicator that the municipality is in a fiscal “trouble zone” (2002). According to Coleman (2002), maintaining a rate beyond the 3.00 is unsustainable and could lead to fiscal stress. As of 2013 there are six municipalities with rates beyond 3.00. These are: Egg Harbor City (3.64), Berlin Township (3.44), Monroe Township (3.36), Waterford Township (3.16), Winslow Township (3.09), and Chesilhurst Borough (3.04).

Table F3

2013 Effective Tax Rates

Municipality	County	2013 Effective Tax Rate	South N.J. Rank
Egg Harbor City	Atlantic	3.64	19
Berlin Township	Camden	3.44	28
Monroe Township	Gloucester	3.36	31
Waterford Township	Camden	3.16	43
Winslow Township	Camden	3.09	44
Chesilhurst Borough	Camden	3.04	47
Medford Lakes Borough	Burlington	2.79	69
Buena Borough	Atlantic	2.78	72
Franklin Township	Gloucester	2.73	74
Egg Harbor Township	Atlantic	2.73	74
Medford Township	Burlington	2.72	76
Wrightstown Borough	Burlington	2.62	87
Evesham Township	Burlington	2.52	96
Hamilton Township	Atlantic	2.47	105
Galloway Township	Atlantic	2.45	109
South Toms River Borough	Ocean	2.45	110
Tabernacle Township	Burlington	2.30	115
Hammonton Town	Atlantic	2.30	116
Shamong Township	Burlington	2.30	117
Barneget Township	Ocean	2.29	118
Southampton Township	Burlington	2.27	120
Buena Vista Township	Atlantic	2.26	122
Mullica Township	Atlantic	2.26	123
Maurice River Township	Cumberland	2.21	128
Manchester Township	Ocean	2.20	129
Weymouth Township	Atlantic	2.15	132
Stafford Township	Ocean	2.12	135
Little Egg Harbor Township	Ocean	2.06	140
Jackson Township	Ocean	2.05	142
Eagleswood Township	Ocean	2.03	144
Plumsted Township	Ocean	2.02	145
Lakehurst Borough	Ocean	2.01	146
Estell Manor City	Atlantic	2.01	147
Port Republic City	Atlantic	2.00	149
Pemberton Township	Burlington	1.98	151
Beachwood Borough	Ocean	1.95	152
Woodland Township	Burlington	1.91	153
Berkeley Township	Ocean	1.85	157
New Hanover Township	Burlington	1.83	159
Folsom Borough	Atlantic	1.79	160
Lacey Township	Ocean	1.78	161
Bass River Township	Burlington	1.74	164
Ocean Township	Ocean	1.66	167
Dennis Township	Cape May	1.49	174
Upper Township	Cape May	1.49	175
Washington Township	Burlington	1.31	180
Woodbine Borough	Cape May	1.26	181
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>			
Berlin Borough	Camden	2.83	67
Springfield Township	Burlington	2.51	100
Vineland City	Cumberland	2.17	130
North Hanover Township	Burlington	1.83	158
Toms River Township	Ocean	1.77	162
Corbin City	Atlantic	1.61	169

F4

Assessment Class Proportions

N.J. Department of Community Affairs, Div. LGS 1999 – 2013

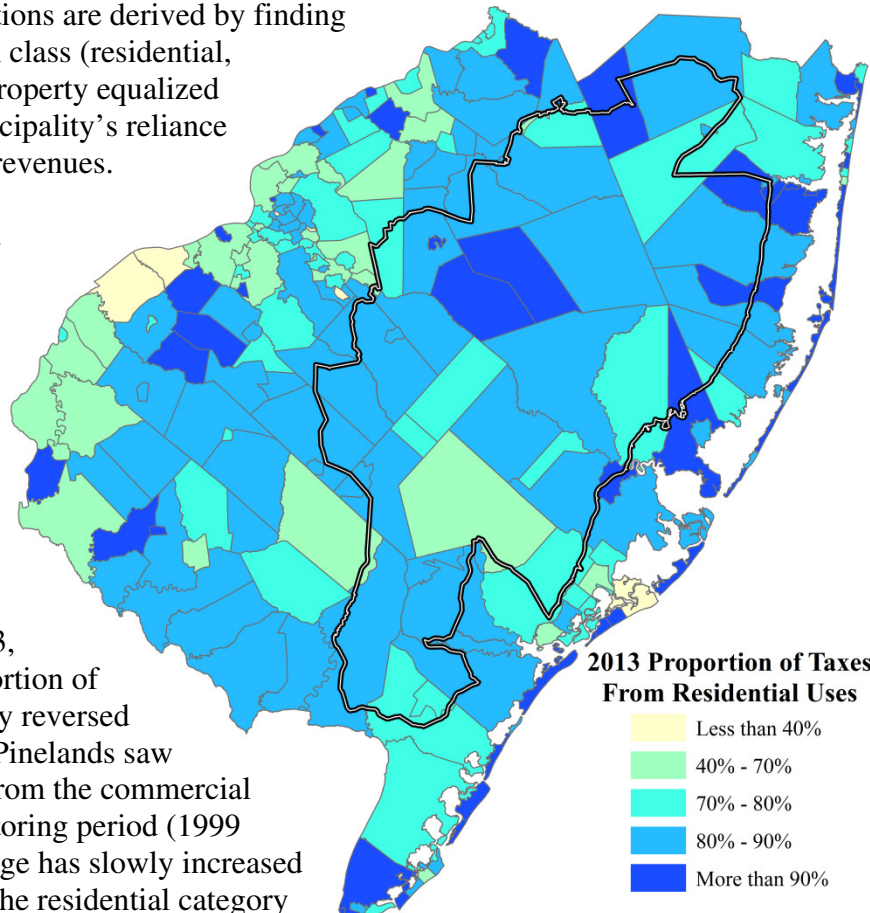
Updated for 2014 LTEM with 2013 data

Compared to 2012, the 2013 percentage of assessed property from residential classes is down in the Pinelands by less than 1%. Assessment class proportions in all three regions remained fairly stable in 2013.

Description: Assessment class proportions are derived by finding the ratio of the equalized value of each class (residential, commercial, vacant, etc.) to the total property equalized value. This helps to measure the municipality's reliance on different types of land uses for tax revenues.

Unit of Analysis: Data for assessment class proportions are compiled at the municipal level and regionally aggregated to allow for inside/outside the Pinelands and statewide analysis.

Findings: Changes in land use since 1999 have occurred slowly. In all three regions, municipal class percentages have been largely dominated by residential uses. In 2003, there was a slight increase in the proportion of the residential category, but was mostly reversed the following year. In 2008, the Non-Pinelands saw an increase in the proportion coming from the commercial category. Throughout the entire monitoring period (1999 through 2013), the residential percentage has slowly increased in all three regions. In the Pinelands, the residential category has increased from 81% in 1999 to 84% in 2013.



In 2013, there were no significant changes in the Pinelands proportions, except for commercial, which increased by about 1 percentage point (a 6% increase from 2012). All other classes stayed about the same. In the Non-Pinelands, the commercial category decreased by 1%. In the state, assessment class percentages went mostly unchanged from 2012.

Of the individual municipalities with at least 10% of their land in the Pinelands Area, Medford Lakes Borough continues to have the greatest percentage coming from residential land uses (98%). Tabernacle Township, Shamong Township, and Beachwood Township follow at 95%. Berlin Township and Wrightstown Borough have the greatest percentage coming from the commercial category at 34%, each. In Folsom Borough, the industrial category makes up 12%; the greatest proportion generated by industrial uses in the Pinelands.

Table F4a

Assessment Class Proportions in Municipal Valuations

Pinelands

Class	2000	2005	2010	2013	Change 2000 - 2013
Vacant Land	5%	4%	3%	3%	-2%
Residential	81%	83%	84%	84%	3%
Agriculture	< 1%	< 1%	< 1%	< 1%	- < 1%
Commercial	11%	10%	10%	10%	- < 1%
Industrial	1%	1%	1%	1%	- < 1%
Apartments	2%	2%	2%	2%	- < 1%

Non-Pinelands

Class	2000	2005	2010	2013	Change 2000 - 2013
Vacant Land	3%	3%	2%	2%	- < 1%
Residential	73%	78%	77%	78%	5%
Agriculture	< 1%	< 1%	< 1%	< 1%	- < 1%
Commercial	19%	16%	16%	15%	-3%
Industrial	3%	2%	2%	2%	- < 1%
Apartments	2%	2%	2%	2%	- < 1%

State

Class	2000	2005	2010	2013	Change 2000 - 2013
Vacant Land	3%	2%	2%	2%	- < 1%
Residential	73%	76%	77%	77%	4%
Agriculture	< 1%	< 1%	< 1%	< 1%	- < 1%
Commercial	15%	15%	14%	14%	-1%
Industrial	6%	5%	4%	4%	-2%
Apartments	3%	3%	3%	3%	- < 1%

Table F4b Assessment Class Proportions for Pinelands Municipalities (2013)

Municipality	County	Vacant	Residential	Agriculture	Commercial	Industrial	Apartments
Medford Lakes Borough	Burlington	< 1%	98%	0%	2%	0%	0%
Tabernacle Township	Burlington	1%	95%	< 1%	3%	< 1%	0%
Shamong Township	Burlington	1%	95%	< 1%	3%	< 1%	0%
Beachwood Borough	Ocean	2%	95%	0%	3%	< 1%	< 1%
Port Republic City	Atlantic	3%	94%	< 1%	3%	0%	0%
Little Egg Harbor Township	Ocean	4%	91%	< 1%	5%	< 1%	< 1%
Plumsted Township	Ocean	2%	90%	< 1%	5%	1%	< 1%
Ocean Township	Ocean	4%	90%	< 1%	5%	< 1%	0%
Berkeley Township	Ocean	2%	90%	< 1%	6%	< 1%	1%
Waterford Township	Camden	2%	90%	< 1%	6%	< 1%	< 1%
Pemberton Township	Burlington	2%	89%	< 1%	6%	< 1%	2%
Mullica Township	Atlantic	5%	89%	< 1%	5%	< 1%	< 1%
Southampton Township	Burlington	2%	89%	< 1%	8%	< 1%	0%
Franklin Township	Gloucester	3%	88%	< 1%	8%	0%	< 1%
Barneгат Township	Ocean	4%	88%	< 1%	6%	< 1%	1%
Estell Manor City	Atlantic	7%	88%	< 1%	3%	1%	< 1%
Medford Township	Burlington	< 1%	87%	< 1%	9%	< 1%	2%
Winslow Township	Camden	2%	87%	< 1%	7%	1%	2%
Jackson Township	Ocean	3%	87%	< 1%	8%	< 1%	1%
Upper Township	Cape May	4%	86%	< 1%	9%	1%	< 1%
Chesilhurst Borough	Camden	8%	86%	0%	5%	< 1%	< 1%
Woodland Township	Burlington	5%	85%	< 1%	4%	6%	0%
South Toms River Borough	Ocean	2%	84%	0%	14%	< 1%	0%
Monroe Township	Gloucester	3%	84%	< 1%	12%	< 1%	1%
Buena Vista Township	Atlantic	5%	84%	< 1%	9%	2%	< 1%
Lacey Township	Ocean	3%	84%	< 1%	8%	5%	< 1%
Galloway Township	Atlantic	4%	84%	< 1%	11%	< 1%	2%
Stafford Township	Ocean	2%	83%	< 1%	14%	< 1%	< 1%
Weymouth Township	Atlantic	5%	83%	< 1%	10%	< 1%	1%
Buena Borough	Atlantic	3%	83%	< 1%	10%	1%	3%
Maurice River Township	Cumberland	4%	83%	< 1%	6%	6%	< 1%
Lakehurst Borough	Ocean	2%	82%	0%	16%	0%	< 1%
Washington Township	Burlington	3%	81%	1%	12%	2%	0%
Dennis Township	Cape May	5%	80%	< 1%	15%	0%	0%
Evesham Township	Burlington	< 1%	79%	< 1%	15%	< 1%	5%
Bass River Township	Burlington	6%	79%	< 1%	14%	0%	0%
Egg Harbor City	Atlantic	3%	79%	0%	14%	2%	2%
Woodbine Borough	Cape May	4%	78%	< 1%	13%	2%	2%
Manchester Township	Ocean	4%	77%	< 1%	10%	< 1%	8%
New Hanover Township	Burlington	2%	76%	< 1%	20%	< 1%	0%
Folsom Borough	Atlantic	4%	76%	< 1%	8%	12%	0%
Eagleswood Township	Ocean	11%	75%	< 1%	12%	2%	< 1%
Hammonton Town	Atlantic	2%	75%	< 1%	20%	2%	< 1%
Egg Harbor Township	Atlantic	4%	74%	< 1%	20%	1%	< 1%
Hamilton Township	Atlantic	4%	69%	< 1%	21%	1%	4%
Berlin Township	Camden	3%	53%	< 1%	34%	9%	1%
Wrightstown Borough	Burlington	3%	51%	< 1%	34%	< 1%	12%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	2%	86%	2%	10%	< 1%	0%
Corbin City	Atlantic	6%	84%	< 1%	10%	0%	0%
North Hanover Township	Burlington	2%	81%	< 1%	13%	< 1%	3%
Berlin Borough	Camden	2%	80%	< 1%	16%	1%	< 1%
Toms River Township	Ocean	2%	79%	< 1%	17%	< 1%	2%
Vineland City	Cumberland	2%	63%	< 1%	24%	7%	3%

F5 Local Municipal Purpose Revenues & State Aid

N.J. Department of Community Affairs, Div. LGS 1999 – 2013

Updated for 2014 LTEM with 2013 data

Per capita municipal budgets increased by 3% in the Pinelands, while budgets in the Non-Pinelands increased 2% from 2012. The Non-Pinelands continues to have a higher per capita budget than the Pinelands (by about \$500).

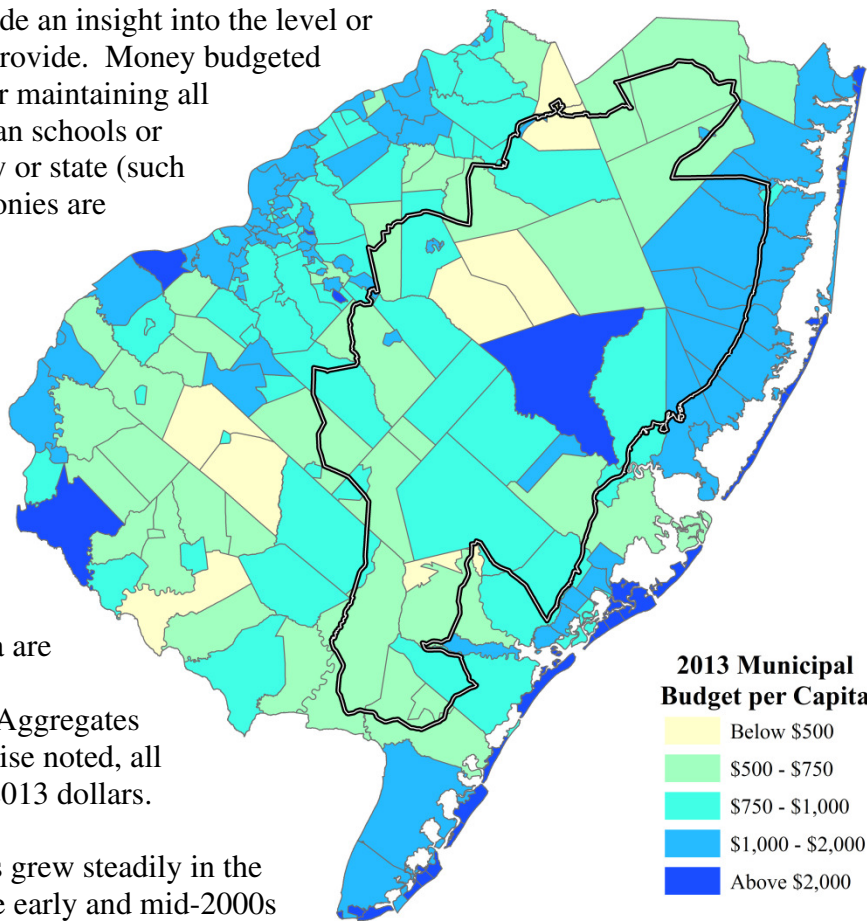
Description: Per capita revenues provide an insight into the level or amount of service a municipality can provide. Money budgeted for local municipal purposes is used for maintaining all services within a municipality other than schools or infrastructure maintained by the county or state (such as roads). Local municipal purpose monies are raised largely through property taxes. Miscellaneous revenues have been added to local purpose monies and include surplus revenues apportioned, receipts from delinquent taxes and liens, and other miscellaneous revenues anticipated. Per capita rates were calculated by using intercensal estimates and census counts, when available.

Unit of Analysis: Municipal level data are regionally aggregated to allow for inside/outside the Pinelands analysis. Aggregates are sums, not averages. Unless otherwise noted, all dollar amounts have been adjusted to 2013 dollars.

Findings: Municipal purpose revenues grew steadily in the Pinelands and the Non-Pinelands in the early and mid-2000s before beginning to decline at the end of the decade. In 2009, municipal purpose revenue totals in the Pinelands hit its highest levels of the monitoring period: 30% greater than revenues in 1999. Likewise the Non-Pinelands saw their highest revenue totals a year later in 2010: 26% greater than 1999 levels. The subsequent decline in revenues from 2009 onwards in the two regions has been more prevalent in the Pinelands.

On a per capita basis, the municipal budget of the Non-Pinelands has consistently greater than that of the Pinelands. From 1999 to 2013, the per capita budget of the Pinelands was, on average, 66% of that of the Non-Pinelands. In 1999, the per capita budget in the Pinelands was \$806. It was \$1,187 in the Non-Pinelands. In 2013, those budgets were \$858 and \$1,366, respectively.

Meanwhile, state aid to the Pinelands has experienced an overall decline. State aid per capita in the Pinelands was \$225 in 1999. With the exception of slight increases in 2001 and 2004, this figure has



continued to decrease. In 2013, the Pinelands received \$119 per capita. This represents a 2% decrease from 2012 and a 47% decrease from 1999 state aid.

State aid in the Non-Pinelands has been more volatile since 1999, while also showing an overall decrease. Non-Pinelands state aid increased from \$249 per capita in 1999 to \$251 per capita in 2007. In 2010, state aid in the Non-Pinelands fell to its low point at \$143 per capita. In 2011, due in large part to a significant increase to the City of Camden’s state aid, the Non-Pinelands actually saw an *increase* in state aid to \$175 per capita. In 2013, state aid per capita in the Non-Pinelands was \$173, a 3% increase from 2012.

Municipal Budgets and State Aid

	Population Estimate	Total Municipal Budget ²³	Municipal Budget per Capita	State Aid	State Aid per Capita
Pinelands in 2000	618,063	\$493,646,865	\$799	\$132,562,775	\$214
Pinelands in 2013	704,526	\$604,188,784	\$858	\$83,918,743	\$119
Change	14%	22%	7%	-37%	-44%
Non-Pinelands in 2000	1,645,496	\$1,952,755,068	\$1,187	\$401,481,568	\$244
Non-Pinelands in 2013	1,727,102	\$2,358,365,223	\$1,366	\$298,350,765	\$173
Change	5%	21%	15%	-26%	-29%

The differences in per capita budgets and state aid between the Pinelands and the Non-Pinelands are likely due to the level of service offered in each region. In the Non-Pinelands, especially in areas around Philadelphia and Atlantic City, there is a greater offering of certain services such as public transportation or waste treatment. While these services are sometimes also offered in Pinelands communities, they are often offered to a lesser degree.

Of the Pinelands municipalities, Berkeley Township has the largest municipal budget at \$45,267,431, followed by Stafford Township, the only other Pinelands municipality to have a budget greater than \$40 million. Only 17 other municipalities have budgets in excess of \$10 million. Port Republic City has the only municipal budget that is less than \$1 million (\$979, 738).

Washington Township has the greatest budget per capita at \$2,059²⁴ while the lowest budget per capita belongs to New Hanover Township at \$243. There were 26 Pinelands municipalities that increased their municipal budgets per capita by an average of \$56. Conversely, 21 Pinelands municipalities decreased their municipal budgets per capita by an average of \$58.

Lacey Township received the greatest amount of state aid among the Pinelands municipalities at \$11,273,840. Upper Township, Winslow Township, and Egg Harbor Township received the next highest amount (nearly 50% of what Lacey Township receives) and are the only other Pinelands municipalities to exceed state aid amounts of \$6 million. Folsom Borough and Port Republic City received the least amount of aid at \$186,082 and \$176,307, respectively.

Maurice River Township’s state aid increased by \$6 per capita (up 4%), and it is the only Pinelands municipality whose state aid per capita increased. Among the other 46 Pinelands municipalities, the average decrease was by \$3 per capita. Plumsted Township saw the greatest decrease of \$21 per capita while Washington Township saw the next greatest decrease of \$14 per capita.

²³ Local Municipal Purposes + Total of Miscellaneous Revenues; does not include school budget.

²⁴ New Hanover Township and Washington Township 2011-2013 municipal budgets are representative of only miscellaneous revenues due to missing data.

Table F5a

Local Municipal Purpose Revenues and State Aid

Pinelands

Year	Population Estimate	Local Municipal Purpose Revenue	Miscellaneous Revenues	Total Municipal Budget	Municipal Budget per Capita	Total State Aid	State Aid per Capita
1999	610,785	\$186,735,795	\$305,373,493	\$492,109,288	\$806	\$137,267,174	\$225
2000	618,063	\$190,336,410	\$303,310,455	\$493,646,865	\$799	\$132,562,775	\$214
2001	630,581	\$205,072,136	\$310,665,964	\$515,738,100	\$818	\$137,012,335	\$217
2002	643,688	\$213,376,179	\$313,978,629	\$527,354,809	\$819	\$133,961,937	\$208
2003	655,268	\$227,994,850	\$310,240,889	\$538,235,739	\$821	\$131,744,407	\$201
2004	664,840	\$243,079,147	\$311,009,342	\$554,088,489	\$833	\$135,846,441	\$204
2005	671,991	\$257,227,633	\$324,561,509	\$581,789,141	\$866	\$133,373,210	\$198
2006	678,998	\$277,514,257	\$328,188,306	\$605,702,563	\$892	\$129,010,818	\$190
2007	683,974	\$295,774,820	\$329,546,751	\$625,321,571	\$914	\$127,869,268	\$187
2008	688,959	\$315,921,069	\$313,411,634	\$629,332,703	\$913	\$114,038,071	\$166
2009	693,936	\$336,631,443	\$303,371,655	\$640,003,098	\$922	\$111,163,363	\$160
2010	698,092	\$352,514,261	\$275,660,123	\$628,174,384	\$900	\$90,772,774	\$130
2011	701,227	\$358,459,179	\$246,684,636	\$605,143,815	\$863	\$86,822,012	\$124
2012	703,169	\$360,908,947	\$226,881,778	\$587,790,725	\$836	\$85,310,291	\$121
2013	704,526	\$369,998,314	\$234,190,470	\$604,188,784	\$858	\$83,918,743	\$119

Non-Pinelands

Year	Population Estimate	Local Municipal Purpose Revenue	Miscellaneous Revenues	Total Municipal Budget	Municipal Budget per Capita	Total State Aid	State Aid per Capita
1999	1,639,053	\$908,062,629	\$1,036,698,065	\$1,944,760,694	\$1,187	\$408,910,732	\$249
2000	1,645,496	\$907,152,097	\$1,045,602,971	\$1,952,755,068	\$1,187	\$401,481,568	\$244
2001	1,655,892	\$904,656,736	\$1,046,858,291	\$1,951,515,027	\$1,179	\$402,723,223	\$243
2002	1,672,319	\$953,313,312	\$1,065,323,514	\$2,018,636,827	\$1,207	\$393,621,121	\$235
2003	1,686,044	\$995,894,178	\$1,061,948,745	\$2,057,842,923	\$1,221	\$386,722,959	\$229
2004	1,697,698	\$1,039,045,437	\$1,116,840,146	\$2,155,885,583	\$1,270	\$402,667,211	\$237
2005	1,705,381	\$1,102,215,438	\$1,162,396,699	\$2,264,612,136	\$1,328	\$427,752,216	\$251
2006	1,713,543	\$1,159,883,833	\$1,109,162,842	\$2,269,046,674	\$1,324	\$417,816,856	\$244
2007	1,716,916	\$1,206,173,180	\$1,129,116,513	\$2,335,289,693	\$1,360	\$431,783,373	\$251
2008	1,719,558	\$1,291,707,333	\$1,129,490,187	\$2,421,197,520	\$1,408	\$370,647,039	\$216
2009	1,721,609	\$1,377,329,112	\$1,050,922,649	\$2,428,251,761	\$1,410	\$379,313,879	\$220
2010	1,723,949	\$1,442,483,817	\$1,000,776,353	\$2,443,260,171	\$1,417	\$245,943,592	\$143
2011	1,727,119	\$1,422,624,643	\$953,399,784	\$2,376,024,428	\$1,376	\$303,044,046	\$175
2012	1,728,320	\$1,427,246,402	\$890,061,833	\$2,317,308,235	\$1,341	\$290,710,502	\$168
2013	1,727,102	\$1,431,013,472	\$927,351,752	\$2,358,365,223	\$1,366	\$298,350,765	\$173

Table F5b Municipal Purpose Revenues and State Aid by Municipality (2013)

Municipality	County	Population Estimate	Municipal Budget	Municipal Budget per Capita	Total State Aid	State Aid per Capita
Washington Township ²⁵	Burlington	684	\$1,408,540	\$2,059	\$817,007	\$1,194
Berlin Township	Camden	5,362	\$8,902,558	\$1,660	\$1,287,847	\$240
Chesilhurst Borough	Camden	1,637	\$2,630,457	\$1,607	\$826,340	\$505
Stafford Township	Ocean	26,941	\$42,656,461	\$1,583	\$2,606,872	\$97
Wrightstown Borough	Burlington	798	\$1,248,100	\$1,564	\$412,067	\$516
Lakehurst Borough	Ocean	2,700	\$3,753,585	\$1,390	\$295,439	\$109
Ocean Township	Ocean	8,653	\$11,697,860	\$1,352	\$606,801	\$70
Egg Harbor City	Atlantic	4,246	\$5,700,189	\$1,342	\$473,461	\$112
South Toms River Borough	Ocean	3,718	\$4,464,322	\$1,201	\$330,995	\$89
Eagleswood Township	Ocean	1,621	\$1,828,867	\$1,128	\$203,363	\$125
Berkeley Township	Ocean	41,829	\$45,267,431	\$1,082	\$4,256,465	\$102
Little Egg Harbor Township	Ocean	20,344	\$21,939,671	\$1,078	\$1,449,056	\$71
Medford Lakes Borough	Burlington	4,136	\$4,305,738	\$1,041	\$289,600	\$70
Barneget Township	Ocean	21,913	\$22,255,528	\$1,016	\$1,048,932	\$48
Lacey Township	Ocean	28,021	\$28,406,709	\$1,014	\$11,273,840	\$402
Hamilton Township	Atlantic	26,752	\$25,784,977	\$964	\$2,841,043	\$106
Upper Township	Cape May	12,187	\$11,686,447	\$959	\$6,323,653	\$519
Waterford Township	Camden	10,792	\$9,836,669	\$911	\$1,304,676	\$121
Mullica Township	Atlantic	6,176	\$5,522,825	\$894	\$493,216	\$80
Beachwood Borough	Ocean	11,172	\$9,950,678	\$891	\$664,673	\$59
Monroe Township	Gloucester	36,732	\$32,331,709	\$880	\$4,035,796	\$110
Port Republic City	Atlantic	1,123	\$979,738	\$872	\$176,307	\$157
Bass River Township	Burlington	1,439	\$1,253,750	\$871	\$304,290	\$211
Medford Township	Burlington	23,281	\$19,975,551	\$858	\$1,991,135	\$86
Pemberton Township	Burlington	27,914	\$23,631,149	\$847	\$3,018,097	\$108
Buena Borough	Atlantic	4,626	\$3,893,081	\$842	\$419,272	\$91
Egg Harbor Township	Atlantic	43,872	\$36,486,934	\$832	\$6,039,065	\$138
Hammonton Town	Atlantic	14,799	\$11,460,940	\$774	\$1,272,714	\$86
Winslow Township	Camden	39,165	\$29,095,100	\$743	\$6,050,378	\$154
Woodland Township	Burlington	1,797	\$1,331,973	\$741	\$628,559	\$350
Woodbine Borough	Cape May	2,448	\$1,778,524	\$727	\$289,537	\$118
Evesham Township	Burlington	45,644	\$32,810,461	\$719	\$3,164,693	\$69
Manchester Township	Ocean	43,342	\$31,059,684	\$717	\$3,217,467	\$74
Jackson Township	Ocean	56,079	\$39,068,719	\$697	\$3,408,439	\$61
Dennis Township	Cape May	6,344	\$4,378,845	\$690	\$1,643,523	\$259
Folsom Borough	Atlantic	1,873	\$1,265,889	\$676	\$186,082	\$99
Franklin Township	Gloucester	16,741	\$10,739,696	\$642	\$1,451,704	\$87
Galloway Township	Atlantic	37,646	\$24,042,597	\$639	\$2,581,284	\$69
Buena Vista Township	Atlantic	7,595	\$4,527,162	\$596	\$716,567	\$94
Estell Manor City	Atlantic	1,737	\$1,029,317	\$593	\$316,382	\$182
Southampton Township	Burlington	10,390	\$6,068,683	\$584	\$1,105,861	\$106
Plumsted Township	Ocean	8,523	\$4,658,221	\$547	\$592,322	\$69
Maurice River Township	Cumberland	7,662	\$3,979,892	\$519	\$1,115,305	\$146
Weymouth Township	Atlantic	2,716	\$1,355,958	\$499	\$281,895	\$104
Tabernacle Township	Burlington	6,970	\$3,225,939	\$463	\$630,161	\$90
Shamong Township	Burlington	6,444	\$2,584,005	\$401	\$582,995	\$90
New Hanover Township ²⁵	Burlington	7,942	\$1,927,657	\$243	\$893,564	\$113
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Toms River Township	Ocean	91,583	\$116,723,780	\$1,275	\$8,492,807	\$93
Corbin City	Atlantic	493	\$494,449	\$1,003	\$102,127	\$207
Springfield Township	Burlington	3,407	\$3,325,966	\$976	\$426,607	\$125
Vineland City	Cumberland	61,050	\$58,028,838	\$951	\$6,190,788	\$101
Berlin Borough	Camden	7,600	\$7,000,436	\$921	\$696,697	\$92
North Hanover Township	Burlington	7,669	\$3,299,657	\$430	\$765,714	\$100

²⁵ Local Municipal Purposes + total miscellaneous revenues; New Hanover Township and Washington Township 2011 – 2013 municipal budgets are representative of miscellaneous revenues only due to incomplete data.

Appendix A. Selected References

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GIS data used in maps and analysis was provided by the following sources:

County Boundaries: U.S. Census Bureau

Municipal Boundaries: U.S. Census Bureau

Census Block Groups: U.S. Census Bureau

Census Blocks: U.S. Census Bureau

Berry Agriculture Location: USDA National Agriculture Statistics Service

Pinelands Area Boundary: N.J. Pinelands Commission

GIS data used in Municipal Fact Book was provided by the following sources:

County Boundaries: N.J. Office of Information Technology

Municipal Boundaries: N.J. Office of Information Technology

Pinelands Area Boundary: N.J. Pinelands Commission

Pinelands Management Areas: N.J. Pinelands Commission

Water Bodies: U.S. Geological Survey

N.J. Aerial Imagery: N.J. Office of Information Technology

Non-N.J. Aerial Imagery: National Aeronautics and Space Administration

Appendix B. Previous Special Studies

Value-Added Blueberry Products Study

The blueberry study was a partnership between Cook College at Rutgers University, the Pinelands Commission (supported through the National Park Service), and New Jersey's blueberry growers for the purpose of boosting the blueberry industry by creating a value-added product. The study was successfully completed in November 2001, and a detailed explanation of the project can be found in the 2001 Annual Report. Development and marketing of value-added blueberry products will continue indefinitely through Blueberry Health, Inc. Blueberry Health buys blueberry pulp for products from New Jersey farmers, and reinvests its profits in blueberry research and product development.

Housing Task Force Study

In October 2003, the Pinelands Commission formed a Housing Task Force in order to update housing demand estimates in the Comprehensive Management Plan. The Economic Monitoring Program has been an integral part of the process, through analysis of population data, the collection and evaluation of population projections, estimating future housing units, defining and calculating vacant developable land using land use and land cover data, and allocating future population and housing to the Pinelands development areas based on vacant land. The Task Force issued its final report in January 2007.

As part of this process, a *Pinelands Population Reference Guide* was created in order to gather population and housing data for the Pinelands for a range of geographic scales from 1970 through 2000 into one document. The reference guide is available on the Long-Term Economic Monitoring Program's 2004 Annual Report CD-ROM.

Pinelands Development Credit Supply & Demand Study

In the fall of 2005, the Pinelands Commission staff began a reexamination of the effectiveness of the Pinelands Development Credit (PDC) program. The PDC program is an integral tool in the implementation of the Comprehensive Management Plan. In order to facilitate the process of directing growth to appropriate areas in the Pinelands region, the PDC program was established to create a market for development rights in the Pinelands. Owners of properties in designated sending areas are afforded the opportunity to "sever" their development interests in their properties and sell those rights to land developers in receiving areas. The developers then use these rights to expand their allowable development densities in regional growth areas, thus directing growth from preservation areas to more suitable growth areas. The owners of land in preservation areas are thus compensated monetarily in exchange for deed-restricting their land from future development.

Since the PDC program is market-driven, its ultimate success depends upon a healthy balance between supply and demand pressures in the land development market in the Pinelands. Initially, the PDC program was slow to be utilized by both developers and land owners in the region. However, in recent years there has been quite a bit of activity in the PDC market, with the price of a development right rising from an initial value of \$2,500 in 1981 to a high of \$40,000 in 2006. Prices fell during 2009; the mean sales price for a development right in 2009 was just over \$15,000.

This study is a comprehensive review of what has worked well to this point, in addition to examining new ideas on how further to stimulate use of PDCs in the coming years. A preliminary package of recommendations was submitted to the Policy and Implementation Committee in the summer of 2007.

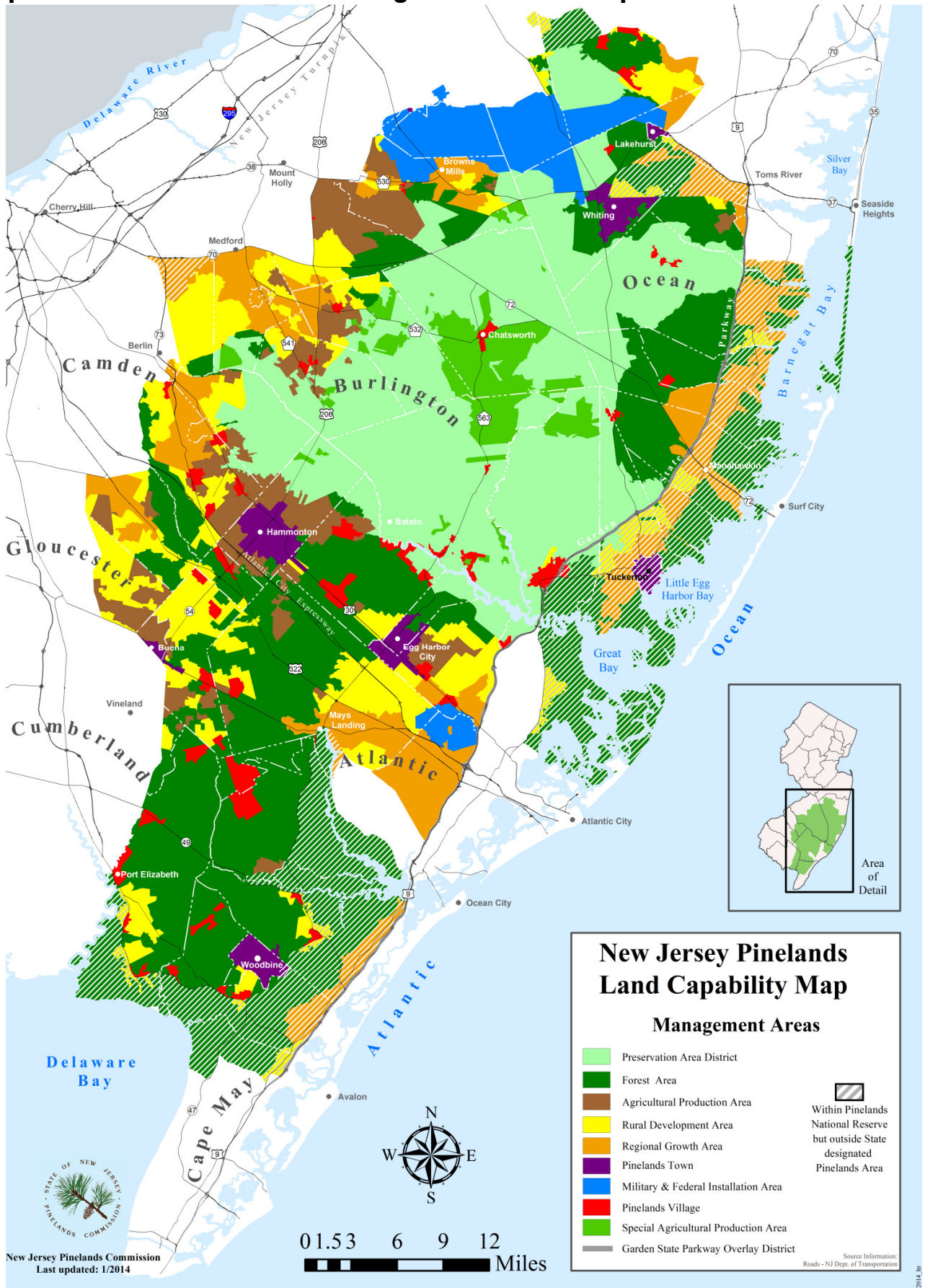
Appendix C. Pinelands Acreage by County

County	Total Acreage	Acreage Inside Pinelands	Acreage Outside Pinelands	% Area in Pinelands	% of Pinelands contributed to by County	% of Southern N.J. contributed to by County
Atlantic	391,134	247,877	143,257	63.4%	26.4%	17.3%
Burlington	524,205	334,224	189,981	63.8%	35.6%	23.1%
Camden	145,592	54,907	90,685	37.7%	5.9%	6.4%
Cape May	182,632	34,807	147,825	19.1%	3.7%	8.1%
Cumberland	321,645	45,398	276,247	14.1%	4.8%	14.2%
Gloucester	215,617	33,581	182,036	15.6%	3.6%	9.5%
Ocean	485,569	187,559	298,010	38.6%	20.0%	21.4%

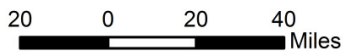
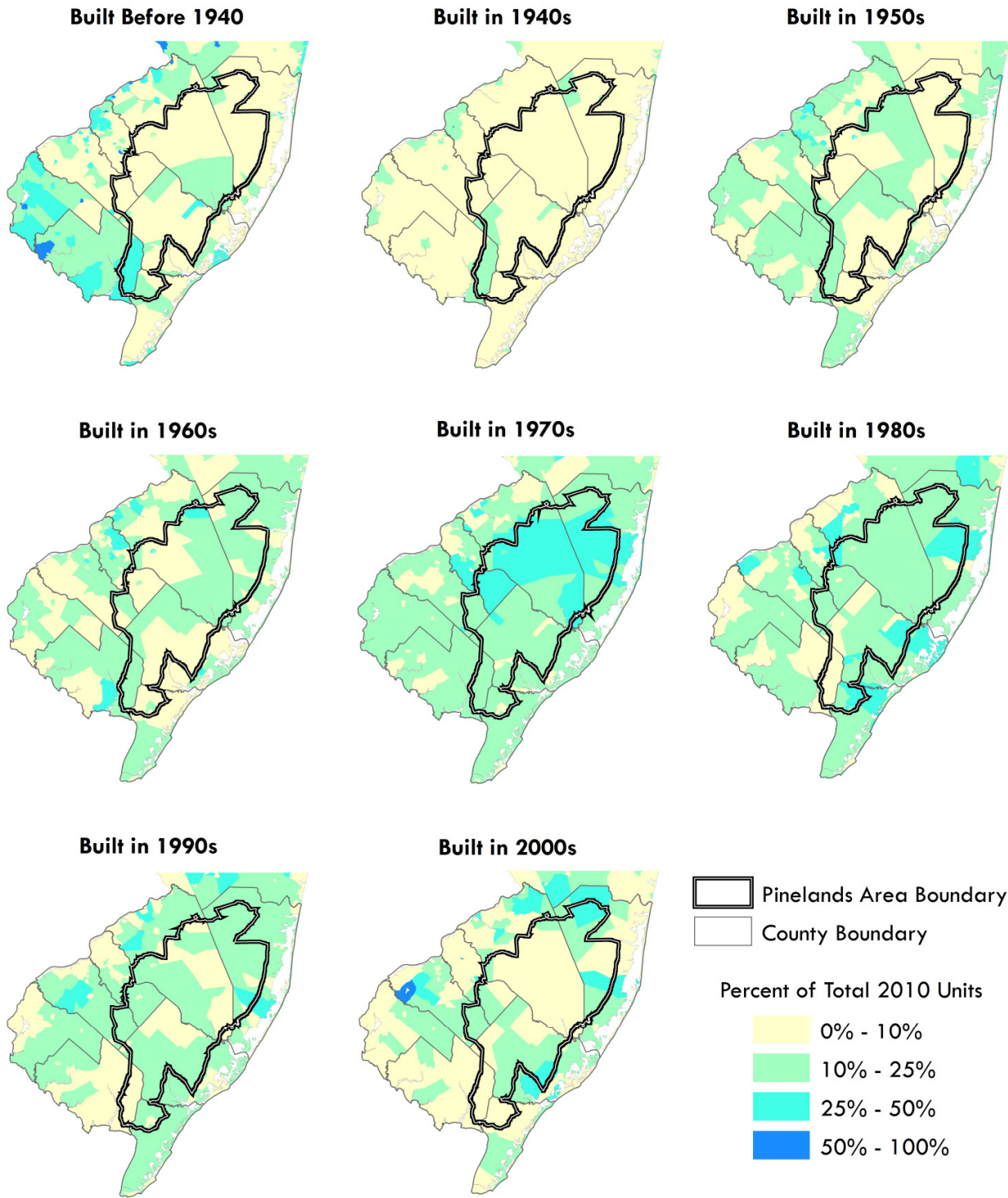
Appendix E. Pinelands Management Areas

Management Area	Description	Permitted Uses	
		Residential	Nonresidential
Preservation Area District (PAD)	Heart of the Pinelands environment and the most critical ecological region; a large, contiguous wilderness-like area of forest that supports diverse plant and animal communities and is home to many threatened and endangered species	Cultural housing on 3.2 acres	Expansion of existing uses only; low intensity recreation
Special Agricultural Production Area (SAPA)	Discrete areas within the Preservation Area primarily used for berry agriculture and horticulture of native Pinelands plants	Farm-related housing on 40 acres	Expansion of existing uses only
Forest Area (FA)	Similar to the Preservation Area District in terms of ecological value; a largely undeveloped area that is an essential element of the Pinelands environment, contains high quality water resources and wetlands and provides suitable habitat for many threatened and endangered species	Clustered housing on one acre lots at an average density of 1 home per 28 acres	Roadside retail sales and services within 300 feet of preexisting use; low intensity recreation
Agricultural Production Area (APA)	Areas of active agricultural use, generally upland field agriculture and row crops, together with adjacent areas with soils suitable for expansion of agricultural operations	Farm-related housing on 10 acres; non-farm housing at a density of 1 home per 40 acres	Agricultural commercial and industrial uses
Rural Development Area (RDA)	Areas that are slightly modified and suitable for limited future development; represents a balance of environmental and development values that is intermediate between the pristine Forest Area and existing growth areas	Clustered housing on one acre lots at an average density of 1 home per 5 acres	Community commercial and light industrial uses on septic; intensive recreation
Regional Growth Area (RGA)	Areas of existing growth and adjacent lands capable of accommodating regional growth influences while protecting the essential character and environment of the Pinelands	2 to 6 homes per acre with sewers	Sewered commercial and industrial uses
Pinelands Village	Small, existing, spatially discrete settlements that are appropriate for infill residential, commercial and industrial development compatible with existing village character	1 to 5 acre lots	Commercial and industrial uses compatible with existing character
Pinelands Town	Large, existing spatially discrete settlements, generally with centralized wastewater or water supply systems	2 to 4 homes per acre with sewers	Sewered commercial and industrial uses
Military and Federal Installation Area (M/F)	Federal enclaves within the Pinelands	Not Applicable	Any use associated with the function of the installation or other public purpose use

Appendix F. Pinelands Management Areas Map



Appendix G. Southern New Jersey Housing Unit Construction Percentage of Total Housing in 2010 Built in Each Decade



Source: U.S. Census Bureau, 2006-2010 ACS
 Geographic Unit: County Sub-Division
 Author: N.J. Pinelands Commission
 Date: March 2014



Appendix H. Municipal Fact Book

Introduction

This section provides a detailed explanation of the Municipal Fact Book. An example of a Fact Book page, with briefer explanations and data sources, follows this detailed section.

The Long-Term Economic Monitoring Program Annual Report has traditionally focused on aggregate trends, with the intent of comparing the economic performance between the Pinelands and the Non-Pinelands regions of southern New Jersey. Maps and tables displaying data for each of the Pinelands municipalities were introduced in 2001 in order to gain a better understanding of how places within the Pinelands compare economically. The Municipal Fact Book was introduced in 2002 to take this concept further by presenting data by municipality, rather than by variable. This arrangement provides a summary of economic conditions in each municipality, while placing each municipality in a broader context by displaying average values for southern New Jersey and municipal ranks for each variable. The 2003 Fact Book was an enhanced version with additional data, including maps and charts for each municipality. In the 2004 Report, the sheets were expanded to include county level data for each of the eight southern New Jersey counties.

Introductory Information

Data for 53 municipalities that are completely or partially located inside the state-designated Pinelands Area is presented alphabetically by county. The introductory information section is found below the name of the municipality. The number of residents and acres within the Pinelands Area boundary is provided, followed by the percentage of the municipality's total population and area in parentheses. Populations for areas inside and outside the Pinelands Area were calculated using census block data. A map (in the upper-right corner) is also available for quick reference as to where the entity of interest can be found in relation to the Pinelands Area.

Municipal Maps

In past years, the municipal Fact Book featured a map for each municipality that showed what type of development could occur and where it is allowed. These categories were based on generalized Pinelands management area boundaries. For example, areas marked as "development" were synonymous with the Pinelands Regional Growth, Town, and Village management areas. This was done in an effort to ease readability of the small maps.

However, the updated layout features a larger map area that lends itself to displaying greater amounts of detail. Therefore, each municipal map now shows the Pinelands Management Areas overlaid on 2012 aerial photography. While the Management Area layer gives the reader a sense for where what types of development are encouraged, the aerial photography gives an indication as to where development has already occurred.

Each map's key, located directly below the map, also conveys the percent of Pinelands land area that is classified as a specific Pinelands Management Area. For example, Buena Borough, a Pinelands municipality with 47% of its land area in the Pinelands Area, shows "22%" in the "Pinelands Town" symbol key. This should be read as "The Pinelands Town Management Area makes up 22% of Buena's land in the Pinelands Area".

Data Table

Most of the table is devoted to several municipal variables tracked in the annual report. Variables are from the most current year available, and are shown beside the southern New Jersey municipal average. Rankings are out of the 202 municipalities in southern New Jersey. A rank of "1" indicates the highest

value for a particular variable, while a rank of “202” typically indicates the lowest value, or that it is last in the series of the variable being tracked. It is important to note that these rankings *do not* indicate a positive or negative connotation.

The variables in the table include: population estimate, population density, population change 2010 to 2013 (estimate), percentage of total land area that is permanently protected *and* in the Pinelands Area, assessed acres of farmland, building permits, residential housing transactions, average sale price of homes, equalized value of property (in millions of dollars), effective tax rate, average residential property tax bill, per capita income estimates (actual values for census years), and estimated unemployment rate. Thorough descriptions of these variables can be found in the appropriate sections in the *Annual Report*.

The number of business establishments in the municipality as well as the number of people employed and the average annual wage is indicated below the rankings section. The bar graph to the right of the rankings section displays housing data from this year’s supplemental variable on census housing data.

General Caveats

- **Ranking Values.** Again, a rank of “1” indicates the highest value for a particular variable, while a rank of “202” typically indicates the lowest value. It is important to note that these rankings *do not* indicate a positive or negative connotation. The reader should understand that the rankings can be interpreted in different ways.
- **Data Volatility.** Municipalities with small populations tend to experience greater volatility in values and rankings from one year to the next.
- **Comparing Ranks to Previous Fact Books.** The change in rank for a particular municipality from its rank in previous Fact Books should be interpreted with caution, as data volatility can often be responsible for a municipality’s change in rank.

Specific Caveats

- **Building Permits:** While some municipalities with low values for building permits may be suffering from economic hardship or minimal population growth, municipalities with small populations or little developable land remaining also tend to have low values.
- **Average Sale Price of Homes:** This value is dependent on the number of residential housing transactions. Municipalities with few transactions (under 10) experience greater volatility in price from year to year.
- **Percentage of Permanently Protected Land:** This value pertains only to municipalities with land in the Pinelands Area; therefore rankings are out of 53 total municipalities. Of those 53 municipalities with any amount of land in the Pinelands Area, eight do not have any permanently protected lands in the Pinelands Area.
- **Business Establishments:** The New Jersey Department of Labor assigns municipal codes to each establishment that files under the Covered Employment Database. The assignment of codes depends on the location information submitted by each business. If a business identifies an incorrect location, for example, a business submits that its location address is Medford Lakes, when the business is

actually in Medford Township, this leads to sources of error. The Department of Labor can also make errors when assigning municipal codes based on place names that businesses submit (i.e. Pomona, Cologne, and Oceanville are all places within Galloway, a single township). The number of business establishments for each municipality should be regarded as illustrative and not as exact figures.

County Level Fact Sheets

County-level fact sheets are reported for seven of the eight counties of southern New Jersey and are presented following the municipal sheets. The county-level sheets follow the same format and design as the municipal-level sheets. It is important to note that the southern New Jersey average that is presented in-between the county value and county rank is *not* the same as the southern New Jersey average shown in the municipal sheets. The southern New Jersey average shown in the county sheets is a *county* average (out of eight counties), while the southern New Jersey average in the municipal sheets is a *municipal* average (out of 202 municipalities). The county fact sheets were placed together at the end of the fact book (rather than interspersing them throughout the book preceding the municipalities) in order to avoid confusion and to allow for easier comparison between counties.

Municipal Fact Book Index

Sample Fact Sheet H6

Atlantic County Pinelands Municipalities

Buena Borough..... H7
Buena Vista Township H8
Corbin City..... H9
Egg Harbor CityH10
Egg Harbor TownshipH11
Estell Manor City.....H12
Folsom Borough.....H13
Galloway TownshipH14
Hamilton Township.....H15
Hammonton TownH16
Mullica Township.....H17
Port Republic City.....H18
Weymouth Township.....H19

Burlington County Pinelands Municipalities

Bass River TownshipH20
Evesham TownshipH21
Medford Lakes Borough.....H22
Medford TownshipH23
New Hanover Township.....H24
North Hanover Township.....H25
Pemberton TownshipH26
Shamong Township.....H27
Southampton TownshipH28
Springfield TownshipH29
Tabernacle TownshipH30
Washington Township.....H31
Woodland Township.....H32
Wrightstown Borough.....H33

Camden County Pinelands Municipalities

Berlin Borough.....H34
Berlin TownshipH35
Chesilhurst BoroughH36
Waterford Township.....H37
Winslow TownshipH38

Cape May County Pinelands Municipalities

Dennis Township.....H39
Upper Township.....H40
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Cumberland County Pinelands Municipalities

Maurice River Township.....H42
Vineland City.....H43

Gloucester County Pinelands Municipalities

Franklin Township.....H44
Monroe Township.....H45

Ocean County Pinelands Municipalities

Barneгат Township H46
Beachwood Borough..... H47
Berkeley Township H48
Eagleswood Township H49
Jackson Township H50
Lacey Township..... H51
Lakehurst Borough..... H52
Little Egg Harbor Township H53
Manchester Township..... H54
Ocean Township H55
Plumsted Township H56
South Toms River Borough..... H57
Stafford Township..... H58
Toms River Township H59

Counties

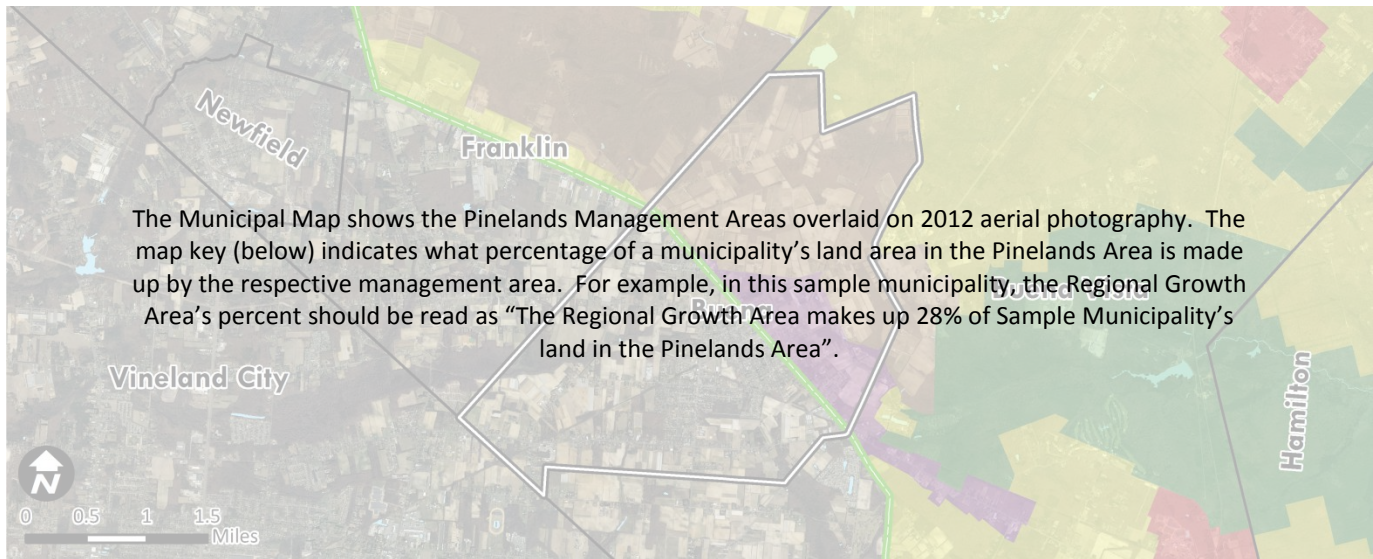
Atlantic County H60
Burlington County H61
Camden County H62
Cape May County H63
Cumberland County H64
Gloucester County..... H65
Ocean County H66

Pinelands Area Municipalities..... H67

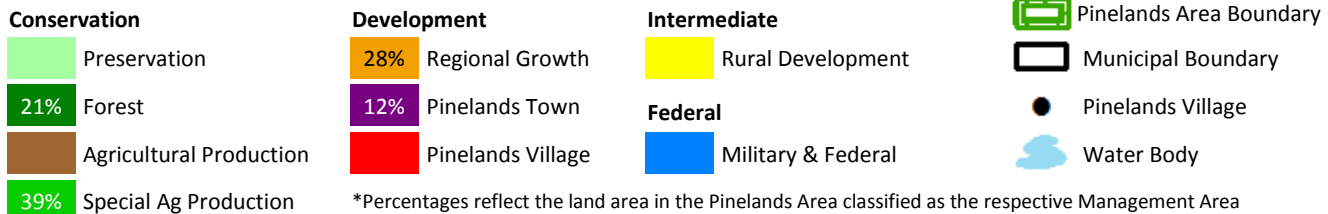
Sample Municipality



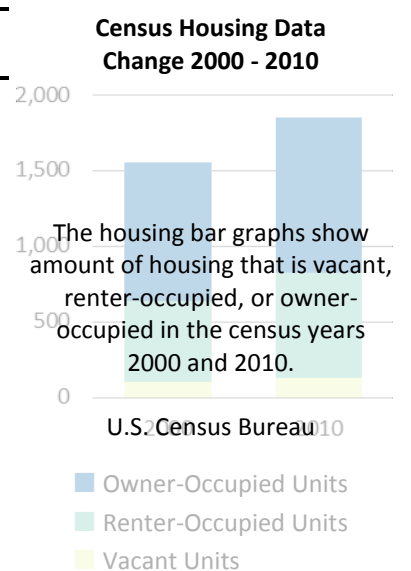
Municipal population inside Pinelands Area (% of total population) - U.S. Census Bureau 2010 Census Block
 Municipal acreage inside Pinelands Area (% of total acreage) - N.J. Pinelands Commission 2013



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate		U.S. Census Bureau	
Population Density (per mile ²)		N.J. Pinelands Commission	
Population Change - 2010 to 2013		U.S. Census Bureau	
% Land Protected in Pinelands Area		N.J. Pinelands Commission	
Assessed Acres of Farmland		N.J. Dept. of Treasury	
Building Permits Issued		N.J. Dept. of Labor	
Housing Transactions		N.J. Dept. of Treasury	
Average Home Sale Price		N.J. Dept. of Treasury	
Equalized Property Value (millions)		N.J. Dept. of Community Affairs	
Effective Tax Rate		N.J. Dept. of Treasury	
Average Residential Property Tax Bill		N.J. Dept. of Community Affairs	
Per Capita Income Estimate		ESRI	
Estimated Unemployment Rate		N.J. Dept. of Labor	
Private Sector Employment		Private Sector Establishments	
N.J. Dept. of Labor		N.J. Dept. of Labor	

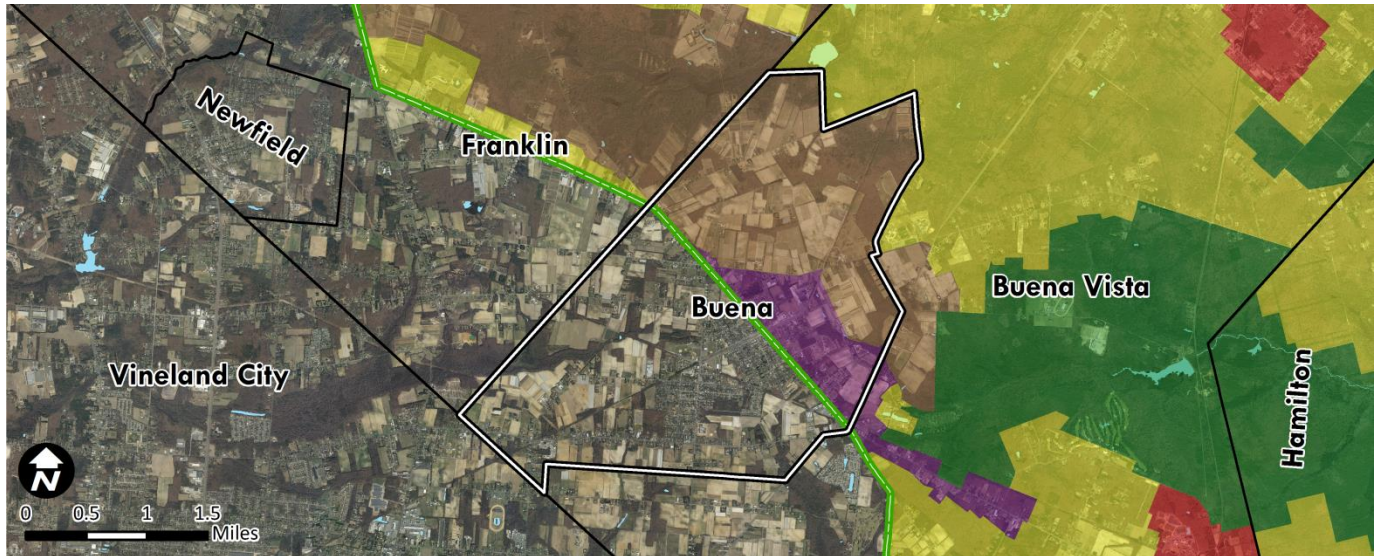


Buena Borough

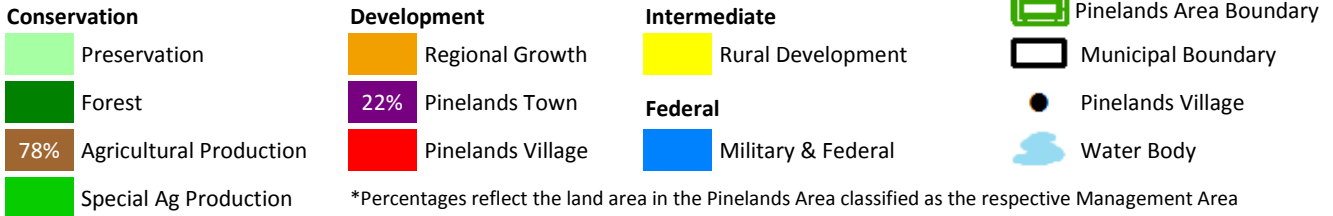


Pinelands Area 2010 population: 1,030 (22% of total population)

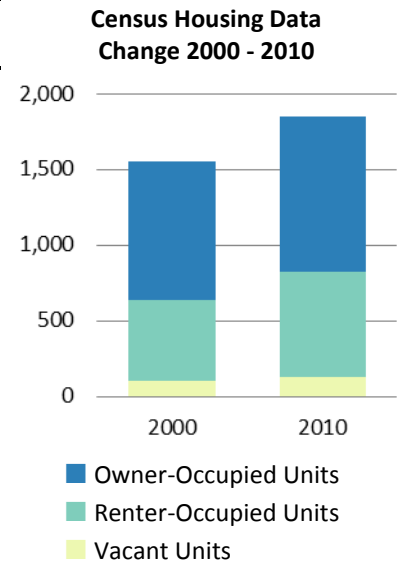
Pinelands Area acreage: 2,277 (47% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,626	12,038	117
Population Density (per mile ²)	612	1,768	126
Population Change - 2010 to 2013	0.5%	< 0.1%	58
% Land Protected in Pinelands Area	21%	36%*	34*
Assessed Acres of Farmland	2,308	2,270	57
Building Permits Issued	0	33	168
Housing Transactions	25	71	110
Average Home Sale Price	\$161,660	\$276,269	151
Equalized Property Value (millions)	\$266.1	\$1,517.6	149
Effective Tax Rate	2.78	2.46	72
Average Residential Property Tax Bill	\$4,883	\$5,698	122
Per Capita Income Estimate (2012)	\$22,957	\$31,778	174
Estimated Unemployment Rate	14.4%	9.2%	19



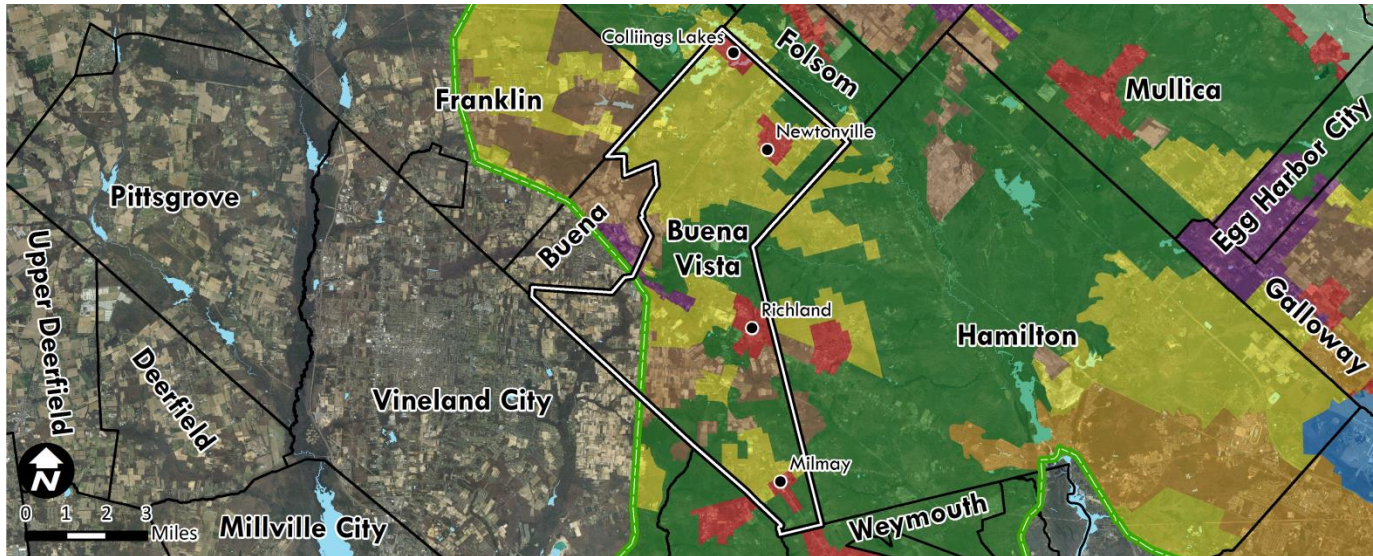
Private Sector Employment 791	Private Sector Establishments 88	Private Sector Avg. Annual Wages \$44,223
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Buena Vista Township

Pinelands Area 2010 population: 6,316 (83% of total population)

Pinelands Area acreage: 23,954 (90% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 31% Forest
- 12% Agricultural Production
- Special Ag Production

Development

- Regional Growth
- 1% Pinelands Town
- 7% Pinelands Village

Intermediate

- 48% Rural Development
- Federal**
- Military & Federal

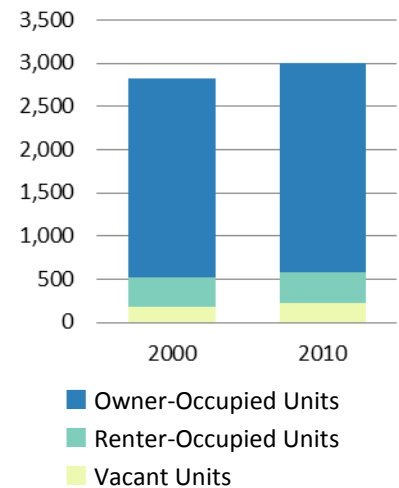
- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,595	12,038	91
Population Density (per mile ²)	183	1,768	170
Population Change - 2010 to 2013	0.3%	< 0.1%	67
% Land Protected in Pinelands Area	16%	36%*	36*
Assessed Acres of Farmland	4,098	2,270	46
Building Permits Issued	6	33	110
Housing Transactions	16	71	131
Average Home Sale Price	\$238,844	\$276,269	77
Equalized Property Value (millions)	\$636.3	\$1,517.6	106
Effective Tax Rate	2.26	2.46	122
Average Residential Property Tax Bill	\$4,794	\$5,698	129
Per Capita Income Estimate (2012)	\$22,912	\$31,778	175
Estimated Unemployment Rate	10.5%	9.2%	63

Private Sector Employment	777	Private Sector Establishments	68	Private Sector Avg. Annual Wages	\$38,219
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Census Housing Data Change 2000 - 2010

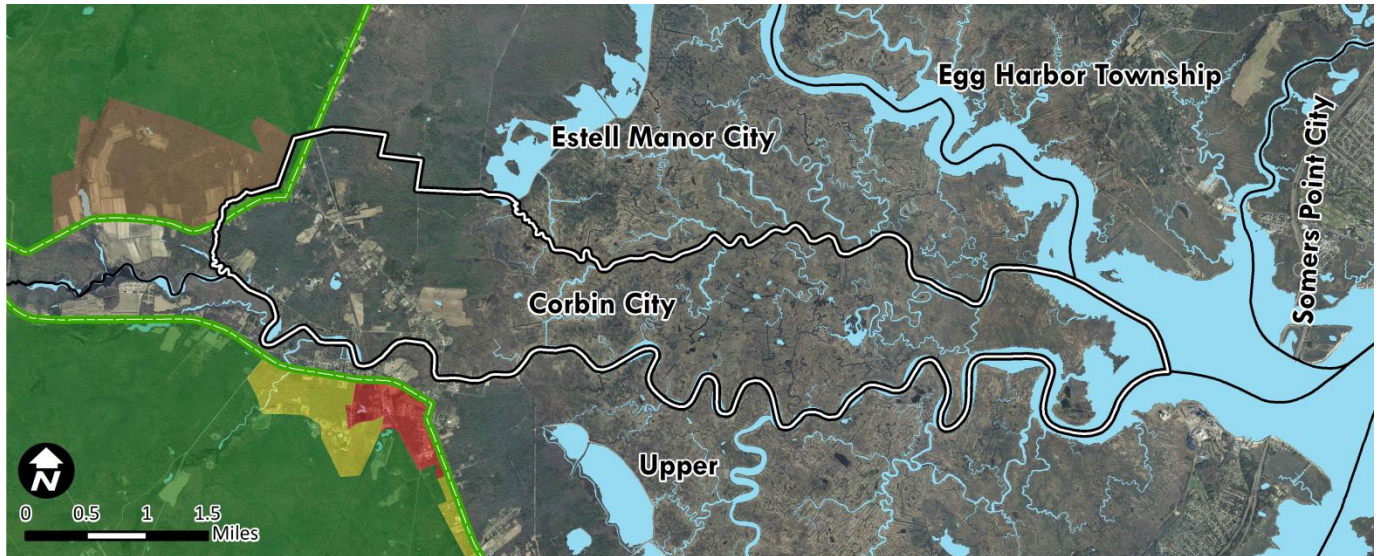


*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

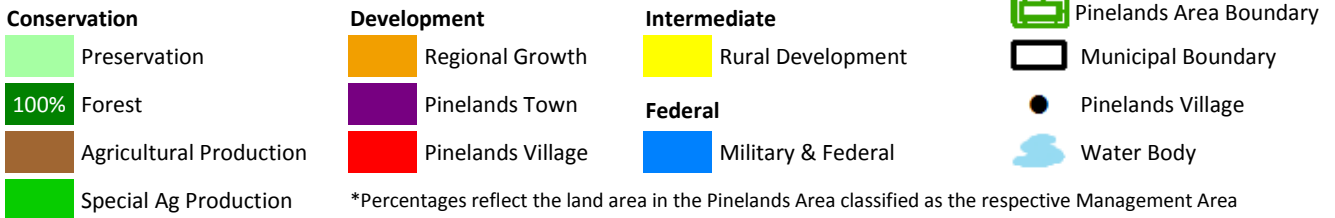
Corbin City

Pinelands Area 2010 population: 5 (1% of total population)

Pinelands Area acreage: 68 (1% of total acreage)

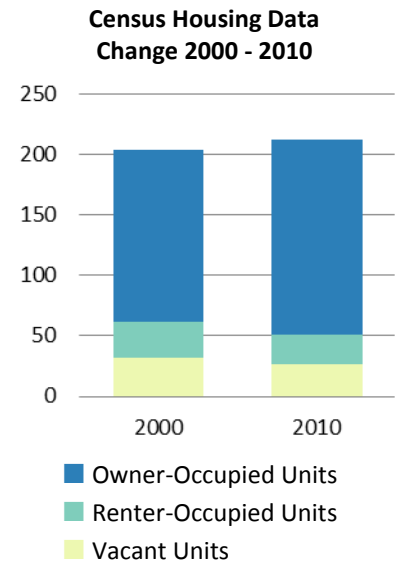


Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	493	12,038	197
Population Density (per mile ²)	56	1,768	192
Population Change - 2010 to 2013	0.2%	< 0.1%	73
% Land Protected in Pinelands Area	9%	36%*	39*
Assessed Acres of Farmland	178	2,270	96
Building Permits Issued	2	33	131
Housing Transactions	4	71	181
Average Home Sale Price	\$146,275	\$276,269	168
Equalized Property Value (millions)	\$51.5	\$1,517.6	195
Effective Tax Rate	1.61	2.46	169
Average Residential Property Tax Bill	\$3,478	\$5,698	190
Per Capita Income Estimate (2012)	\$25,944	\$31,778	150
Estimated Unemployment Rate	11.6%	9.2%	45

Private Sector Employment	46	Private Sector Establishments	12	Private Sector Avg. Annual Wages	\$18,080
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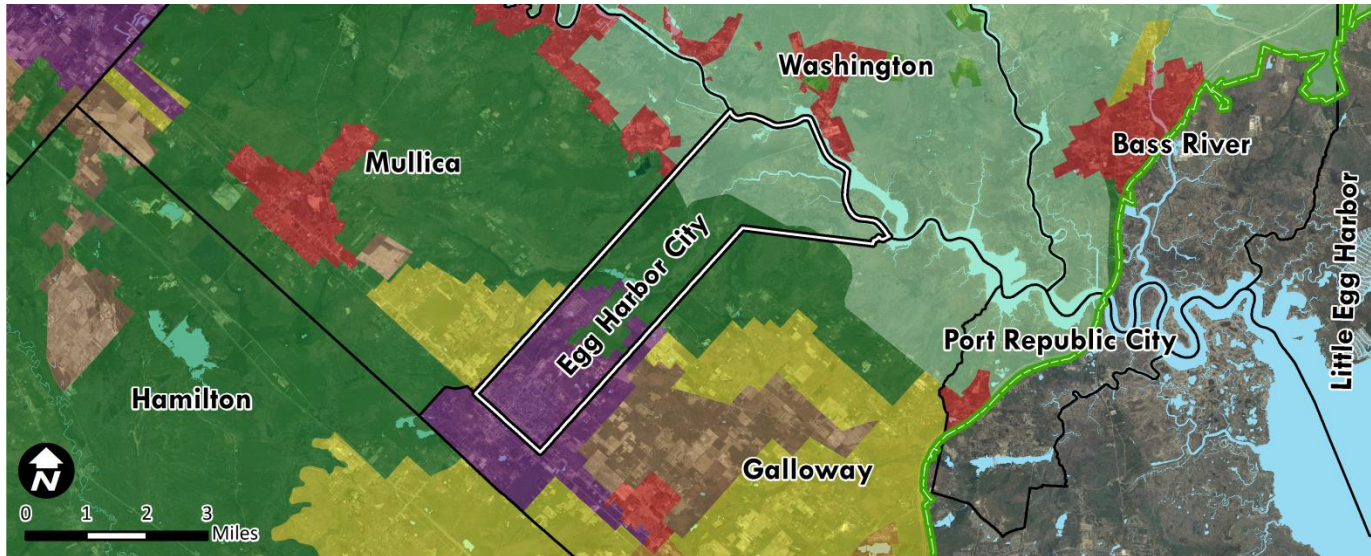


*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Egg Harbor City

Pinelands Area 2010 population: 4,243 (100% of total population)

Pinelands Area acreage: 7,372 (100% of total acreage)



Pinelands Management Areas

Conservation

- 35% Preservation
- 36% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- 29% Pinelands Town
- Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

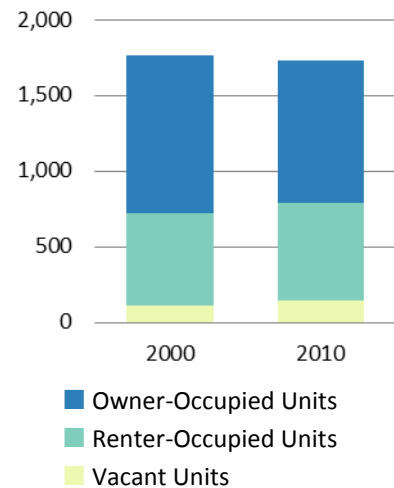
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,246	12,038	123
Population Density (per mile ²)	369	1,768	144
Population Change - 2010 to 2013	0.1%	< 0.1%	82
% Land Protected in Pinelands Area	2%	36%*	43*
Assessed Acres of Farmland	0	2,270	123
Building Permits Issued	17	33	68
Housing Transactions	16	71	131
Average Home Sale Price	\$144,844	\$276,269	170
Equalized Property Value (millions)	\$237.1	\$1,517.6	159
Effective Tax Rate	3.64	2.46	19
Average Residential Property Tax Bill	\$5,880	\$5,698	79
Per Capita Income Estimate (2012)	\$19,122	\$31,778	194
Estimated Unemployment Rate	18.4%	9.2%	5

Census Housing Data Change 2000 - 2010



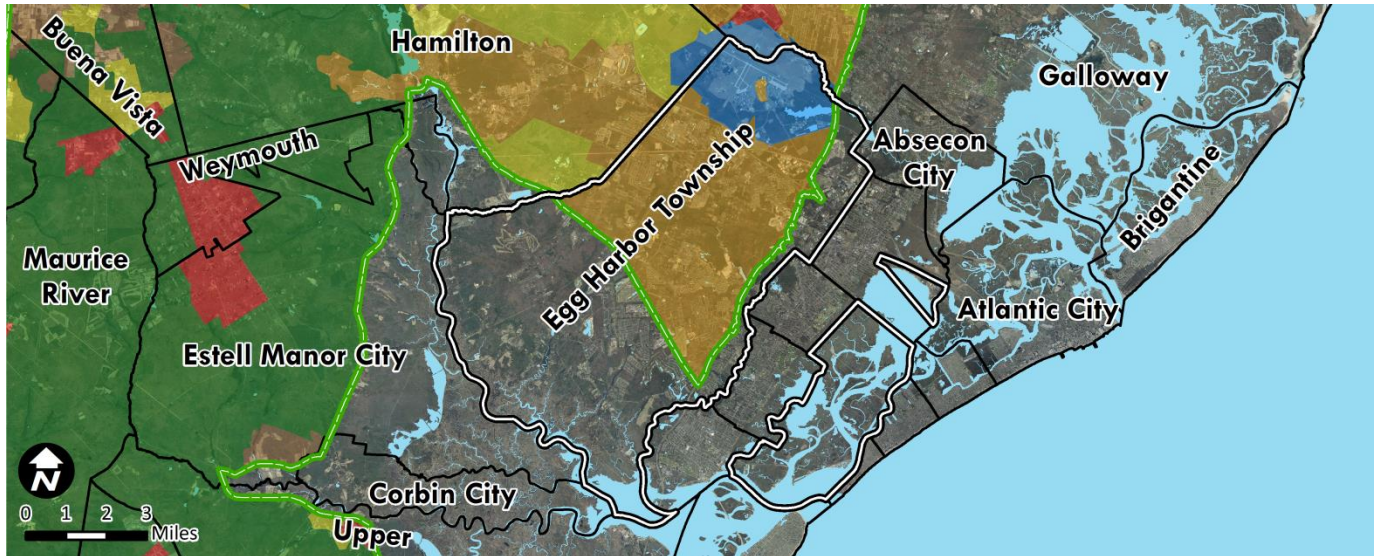
Private Sector Employment 2,536	Private Sector Establishments 225	Private Sector Avg. Annual Wages \$31,224
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Egg Harbor Township

Pinelands Area 2010 population: 27,556 (64% of total population)

Pinelands Area acreage: 17,867 (44% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 79% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

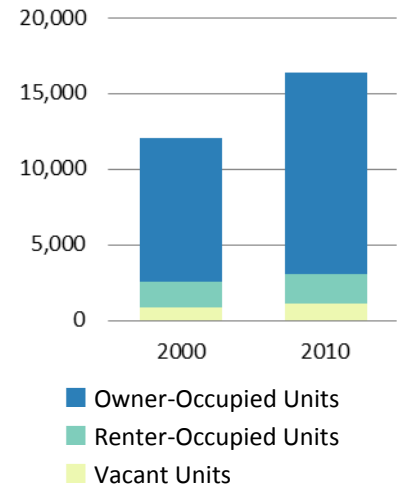
- Rural Development
- Federal**
- 21% Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	43,872	12,038	11
Population Density (per mile ²)	694	1,768	121
Population Change - 2010 to 2013	1.3%	< 0.1%	29
% Land Protected in Pinelands Area	1%	36%*	44*
Assessed Acres of Farmland	2,417	2,270	56
Building Permits Issued	65	33	31
Housing Transactions	107	71	45
Average Home Sale Price	\$229,956	\$276,269	84
Equalized Property Value (millions)	\$4,356.2	\$1,517.6	14
Effective Tax Rate	2.73	2.46	74
Average Residential Property Tax Bill	\$5,852	\$5,698	80
Per Capita Income Estimate (2012)	\$28,260	\$31,778	119
Estimated Unemployment Rate	10.8%	9.2%	56

Census Housing Data Change 2000 - 2010



Private Sector Employment
11,711

Private Sector Establishments
845

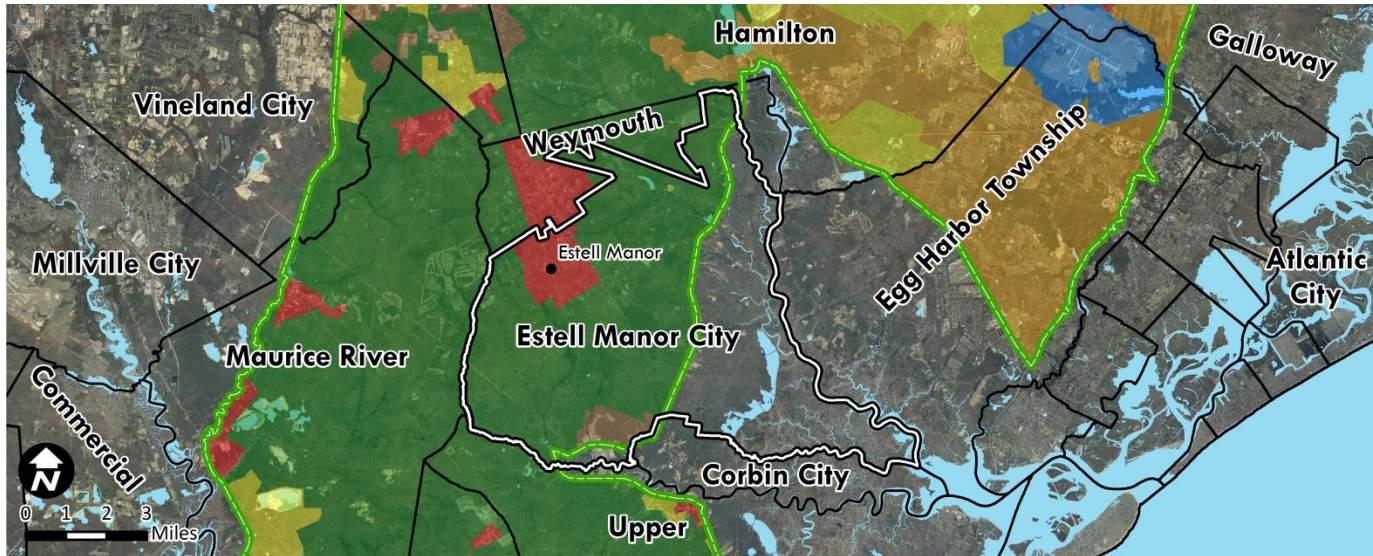
Private Sector Avg. Annual Wages
\$46,567

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Estell Manor City

Pinelands Area 2010 population: 1,624 (94% of total population)

Pinelands Area acreage: 22,423 (63% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 88% Forest
- 4% Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 8% Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

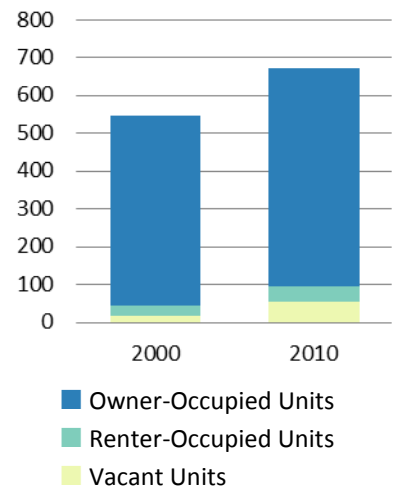
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,737	12,038	167
Population Density (per mile ²)	31	1,768	196
Population Change - 2010 to 2013	0.1%	< 0.1%	78
% Land Protected in Pinelands Area	55%	36%*	15*
Assessed Acres of Farmland	9,700	2,270	12
Building Permits Issued	2	33	131
Housing Transactions	7	71	164
Average Home Sale Price	\$208,471	\$276,269	101
Equalized Property Value (millions)	\$171.6	\$1,517.6	174
Effective Tax Rate	2.01	2.46	147
Average Residential Property Tax Bill	\$4,069	\$5,698	168
Per Capita Income Estimate (2012)	\$27,526	\$31,778	127
Estimated Unemployment Rate	13.7%	9.2%	25

Census Housing Data Change 2000 - 2010



Private Sector Employment	134	Private Sector Establishments	28	Private Sector Avg. Annual Wages	\$31,909
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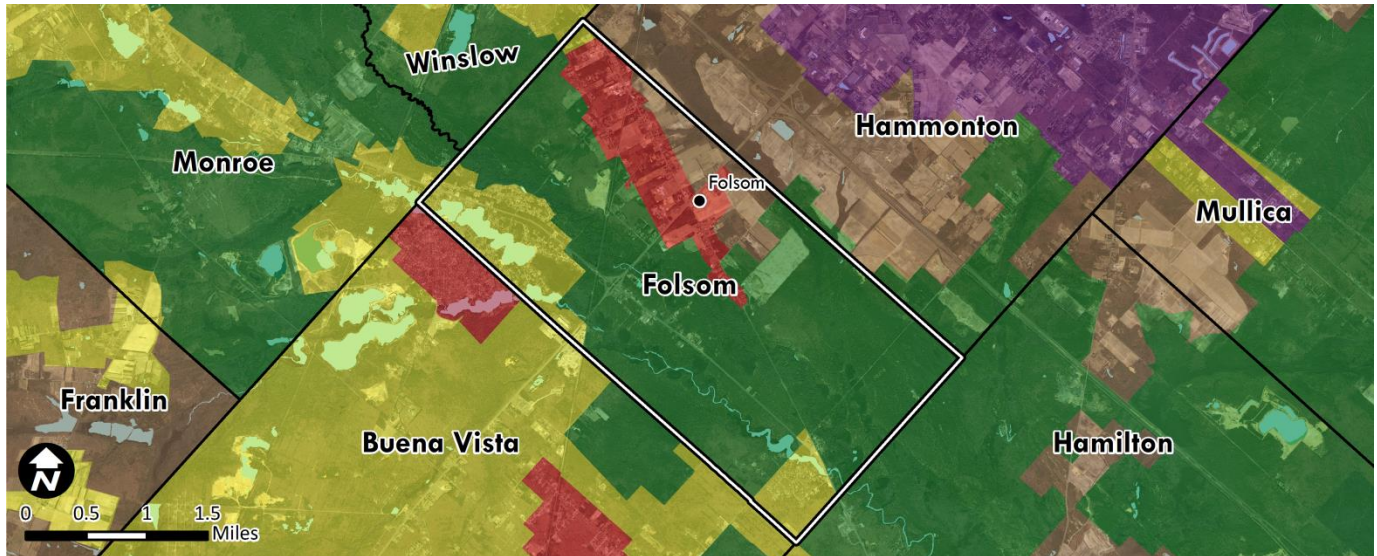
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Folsom Borough

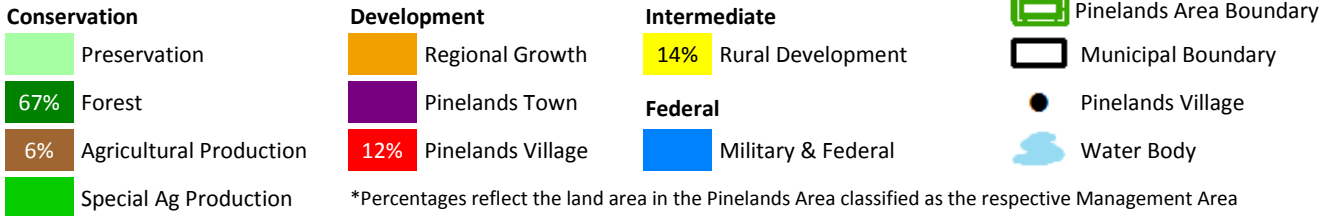


Pinelands Area 2010 population: 1,885 (100% of total population)

Pinelands Area acreage: 5,426 (100% of total acreage)

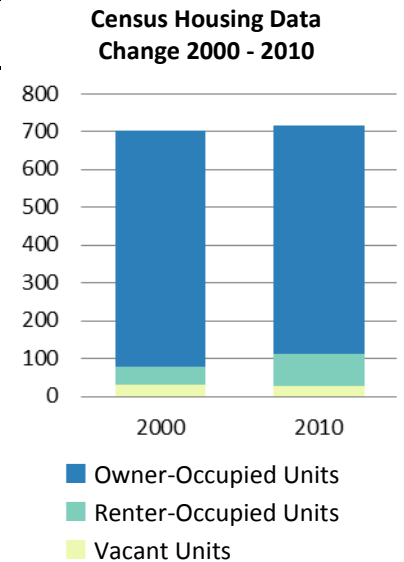


Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,873	12,038	161
Population Density (per mile ²)	221	1,768	164
Population Change - 2010 to 2013	-0.6%	< 0.1%	146
% Land Protected in Pinelands Area	16%	36%*	35*
Assessed Acres of Farmland	674	2,270	76
Building Permits Issued	1	33	145
Housing Transactions	7	71	164
Average Home Sale Price	\$207,814	\$276,269	104
Equalized Property Value (millions)	\$181.0	\$1,517.6	170
Effective Tax Rate	1.79	2.46	160
Average Residential Property Tax Bill	\$3,666	\$5,698	185
Per Capita Income Estimate (2012)	\$26,582	\$31,778	143
Estimated Unemployment Rate	14.3%	9.2%	20

Private Sector Employment	723	Private Sector Establishments	38	Private Sector Avg. Annual Wages	\$75,450
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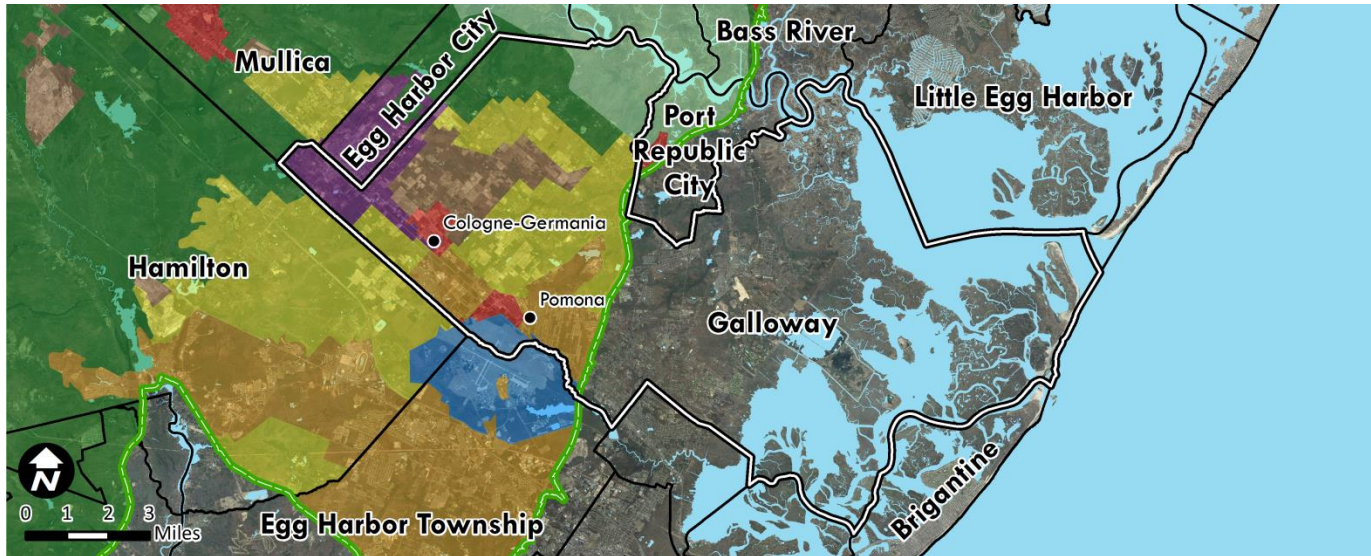


*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Galloway Township

Pinelands Area 2010 population: 14,947 (40% of total population)

Pinelands Area acreage: 27,005 (38% of total acreage)



Pinelands Management Areas

Conservation

- 10% Preservation
- 12% Forest
- 14% Agricultural Production
- Special Ag Production

Development

- 14% Regional Growth
- 9% Pinelands Town
- 3% Pinelands Village

Intermediate

- 34% Rural Development

Federal

- 3% Military & Federal

Pinelands Area Boundary

Municipal Boundary

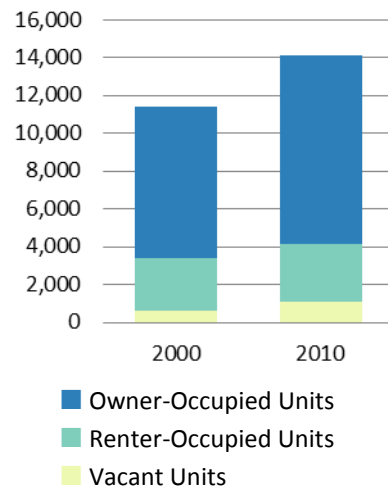
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	37,646	12,038	17
Population Density (per mile ²)	341	1,768	149
Population Change - 2010 to 2013	0.8%	< 0.1%	42
% Land Protected in Pinelands Area	14%	36%*	37*
Assessed Acres of Farmland	539	2,270	82
Building Permits Issued	31	33	49
Housing Transactions	266	71	11
Average Home Sale Price	\$200,960	\$276,269	107
Equalized Property Value (millions)	\$3,095.2	\$1,517.6	29
Effective Tax Rate	2.45	2.46	109
Average Residential Property Tax Bill	\$4,831	\$5,698	126
Per Capita Income Estimate (2012)	\$29,912	\$31,778	101
Estimated Unemployment Rate	10.8%	9.2%	56

Census Housing Data Change 2000 - 2010



Private Sector Employment	7,835	Private Sector Establishments	498	Private Sector Avg. Annual Wages	\$42,126
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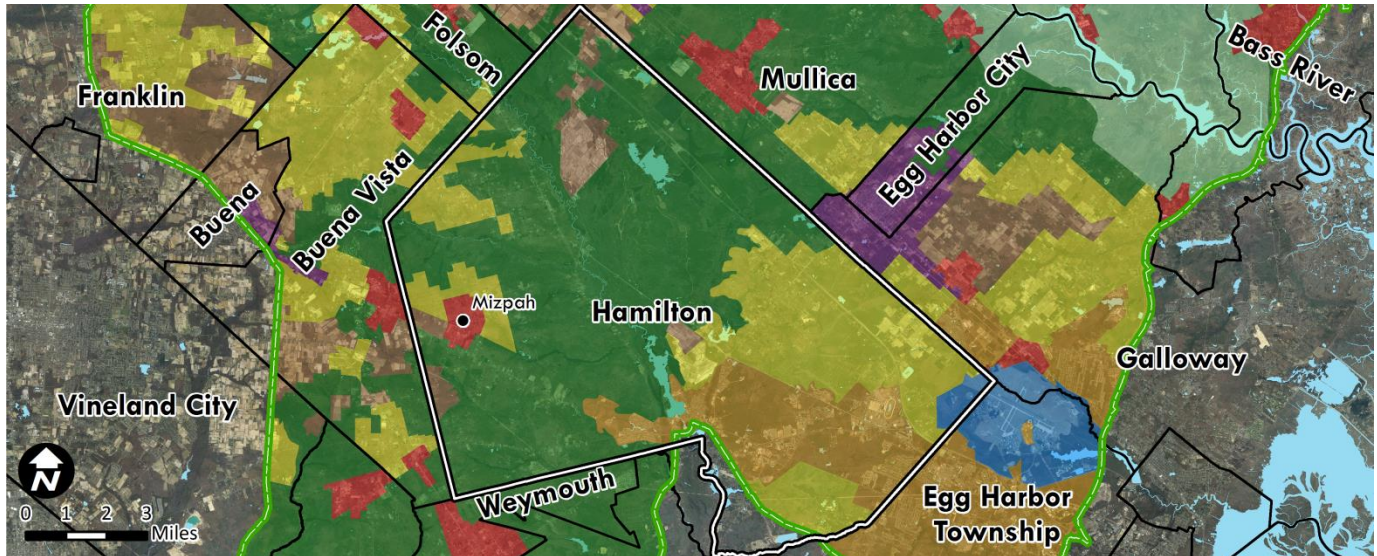
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Hamilton Township



Pinelands Area 2010 population: 24,954 (94% of total population)

Pinelands Area acreage: 70,065 (97% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 55% Forest
- 4% Agricultural Production
- Special Ag Production

Development

- 13% Regional Growth
- Pinelands Town
- 1% Pinelands Village

Intermediate

- 25% Rural Development
- Federal**
- 1% Military & Federal

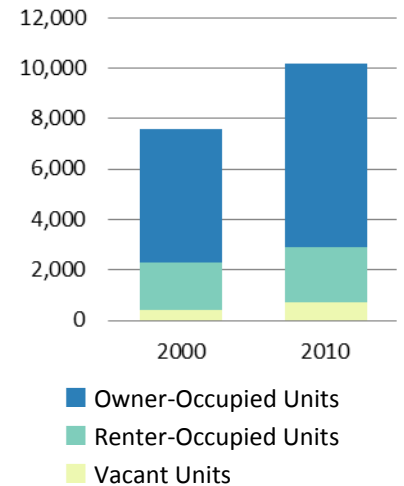
- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	26,752	12,038	27
Population Density (per mile ²)	237	1,768	159
Population Change - 2010 to 2013	0.9%	< 0.1%	37
% Land Protected in Pinelands Area	36%	36%*	26*
Assessed Acres of Farmland	6,331	2,270	32
Building Permits Issued	0	33	168
Housing Transactions	132	71	30
Average Home Sale Price	\$194,327	\$276,269	116
Equalized Property Value (millions)	\$2,375.2	\$1,517.6	40
Effective Tax Rate	2.47	2.46	105
Average Residential Property Tax Bill	\$4,676	\$5,698	140
Per Capita Income Estimate (2012)	\$26,571	\$31,778	144
Estimated Unemployment Rate	11.5%	9.2%	47

Private Sector Employment	7,434	Private Sector Establishments	519	Private Sector Avg. Annual Wages	\$28,165
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Census Housing Data Change 2000 - 2010

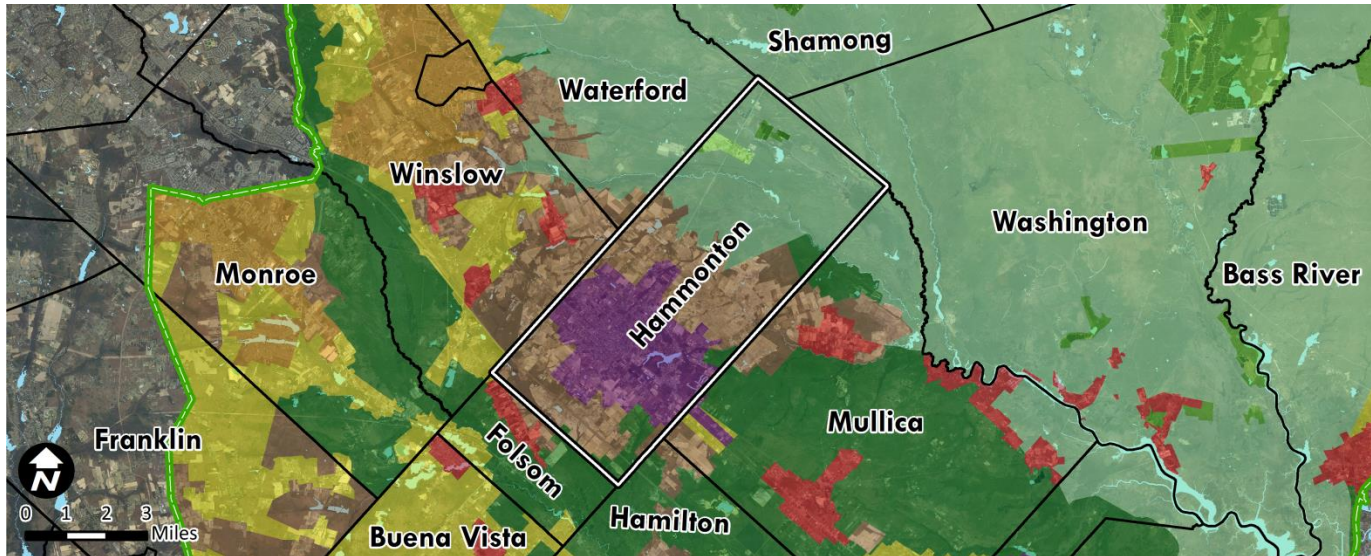


*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Hammonton Town

Pinelands Area 2010 population: 14,791 (100% of total population)

Pinelands Area acreage: 26,581 (100% of total acreage)



Pinelands Management Areas

Conservation

- 33% Preservation
- 5% Forest
- 33% Agricultural Production
- 2% Special Ag Production

Development

- Regional Growth
- 26% Pinelands Town
- Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

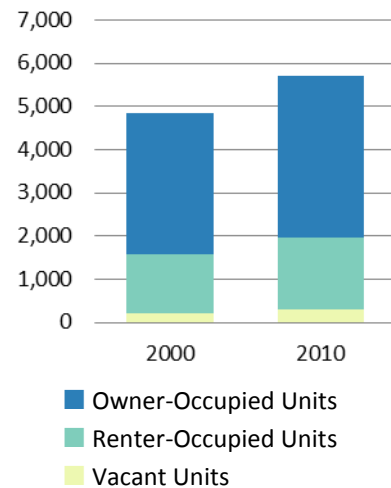
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	14,799	12,038	46
Population Density (per mile ²)	356	1,768	147
Population Change - 2010 to 2013	0.1%	< 0.1%	83
% Land Protected in Pinelands Area	49%	36%*	21*
Assessed Acres of Farmland	6,505	2,270	30
Building Permits Issued	7	33	109
Housing Transactions	70	71	62
Average Home Sale Price	\$230,323	\$276,269	83
Equalized Property Value (millions)	\$1,316.5	\$1,517.6	64
Effective Tax Rate	2.30	2.46	116
Average Residential Property Tax Bill	\$4,975	\$5,698	119
Per Capita Income Estimate (2012)	\$25,434	\$31,778	152
Estimated Unemployment Rate	8.4%	9.2%	109

Census Housing Data Change 2000 - 2010



Private Sector Employment	7,296	Private Sector Establishments	567	Private Sector Avg. Annual Wages	\$38,385
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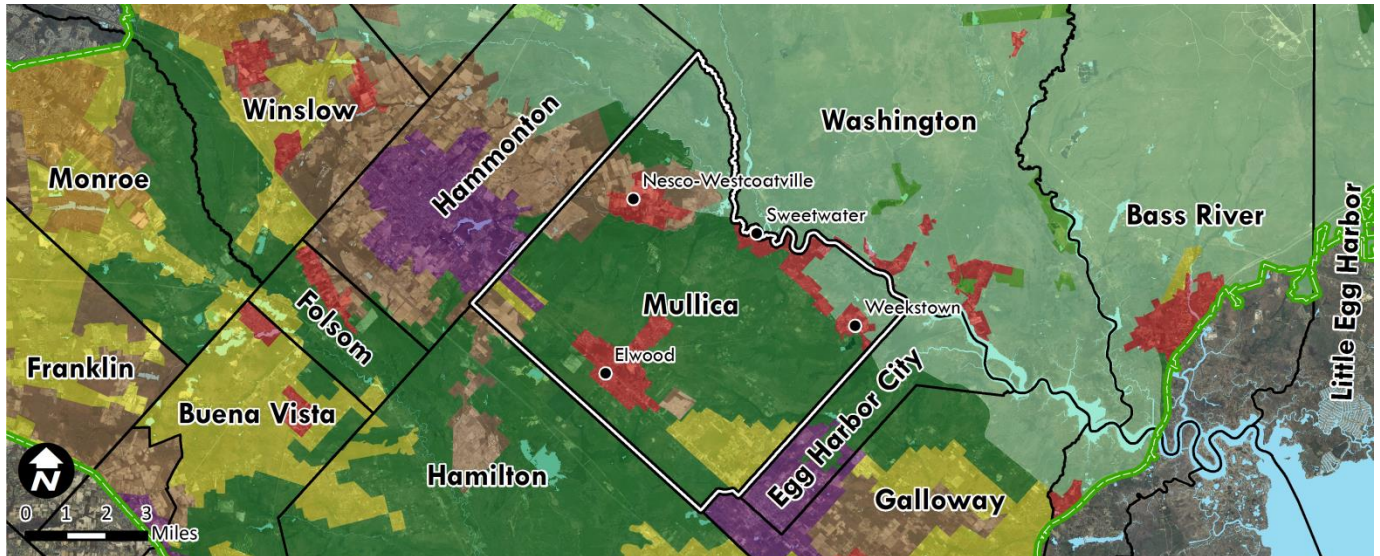
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Mullica Township

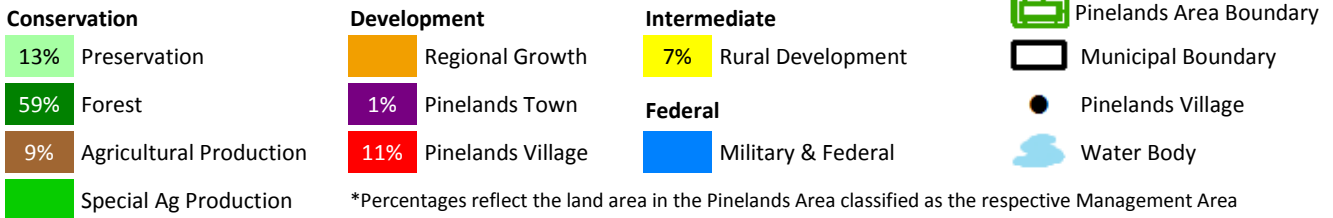


Pinelands Area 2010 population: 6,147 (100% of total population)

Pinelands Area acreage: 36,406 (100% of total acreage)

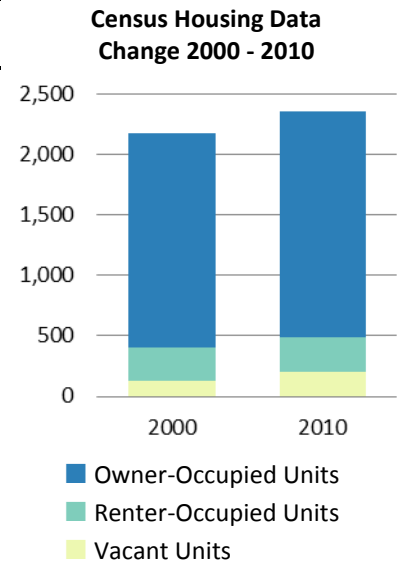


Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,176	12,038	102
Population Density (per mile ²)	109	1,768	182
Population Change - 2010 to 2013	0.5%	< 0.1%	61
% Land Protected in Pinelands Area	30%	36%*	30*
Assessed Acres of Farmland	6,221	2,270	34
Building Permits Issued	18	33	66
Housing Transactions	27	71	105
Average Home Sale Price	\$191,911	\$276,269	122
Equalized Property Value (millions)	\$489.5	\$1,517.6	117
Effective Tax Rate	2.26	2.46	123
Average Residential Property Tax Bill	\$4,751	\$5,698	132
Per Capita Income Estimate (2012)	\$26,613	\$31,778	142
Estimated Unemployment Rate	15.2%	9.2%	14

Private Sector Employment	129	Private Sector Establishments	30	Private Sector Avg. Annual Wages	\$30,243
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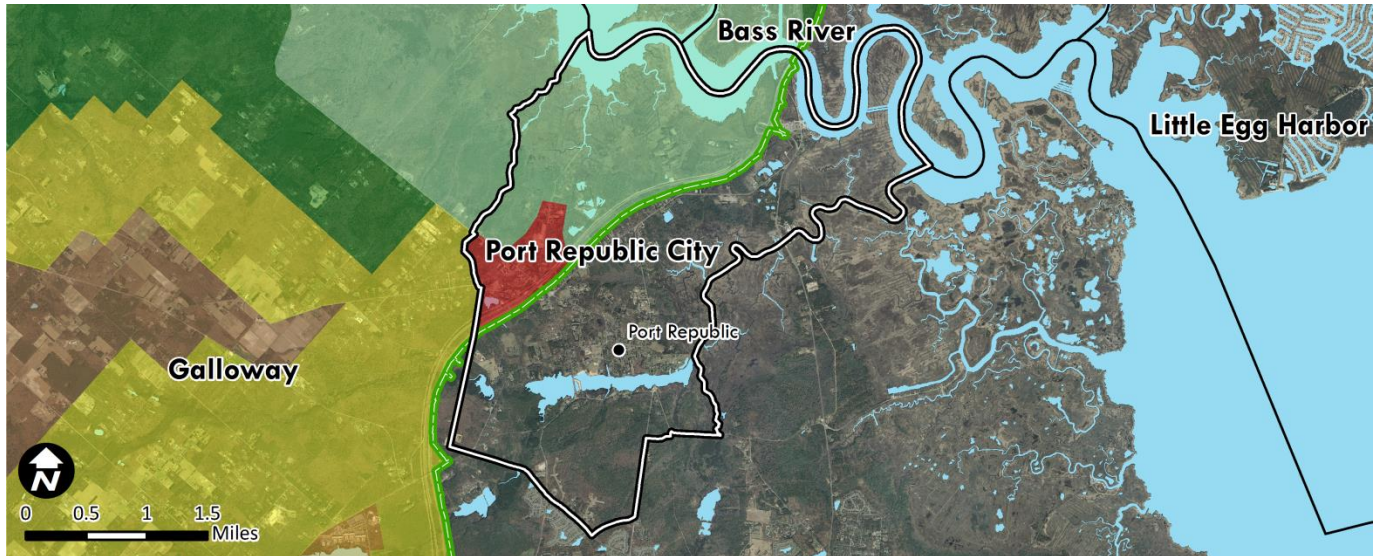
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Port Republic City



Pinelands Area 2010 population: 88 (8% of total population)

Pinelands Area acreage: 1,952 (36% of total acreage)



Pinelands Management Areas

Conservation

- 84% Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 16% Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

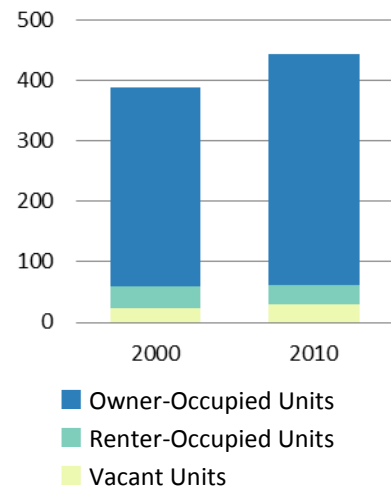
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,123	12,038	182
Population Density (per mile ²)	132	1,768	177
Population Change - 2010 to 2013	0.7%	< 0.1%	46
% Land Protected in Pinelands Area	37%	36%*	25*
Assessed Acres of Farmland	136	2,270	99
Building Permits Issued	1	33	145
Housing Transactions	5	71	172
Average Home Sale Price	\$336,738	\$276,269	33
Equalized Property Value (millions)	\$129.6	\$1,517.6	181
Effective Tax Rate	2.00	2.46	149
Average Residential Property Tax Bill	\$5,442	\$5,698	93
Per Capita Income Estimate (2012)	\$36,128	\$31,778	50
Estimated Unemployment Rate	9.1%	9.2%	90

Census Housing Data Change 2000 - 2010



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
25	12	\$24,993

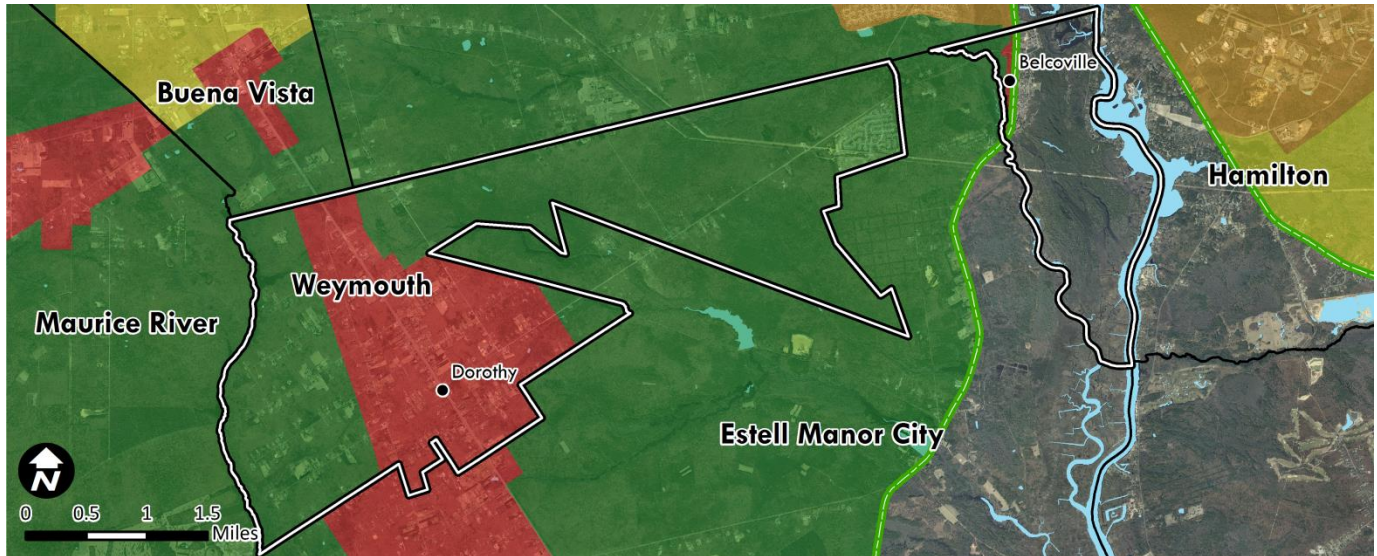
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Weymouth Township

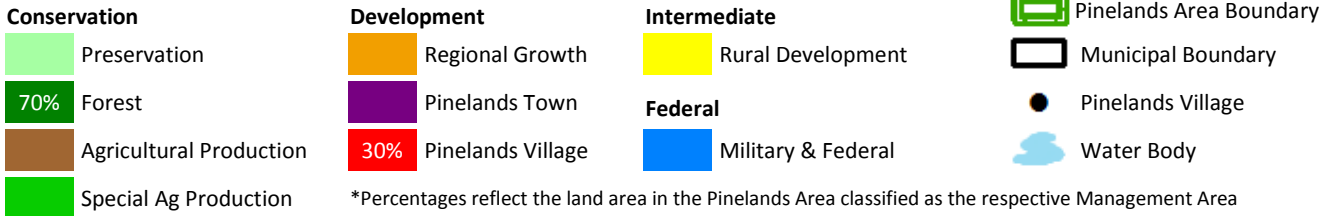


Pinelands Area 2010 population: 2,086 (77% of total population)

Pinelands Area acreage: 6,383 (83% of total acreage)

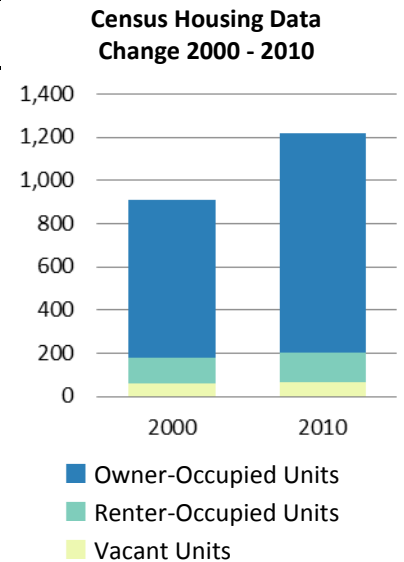


Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,716	12,038	148
Population Density (per mile ²)	225	1,768	163
Population Change - 2010 to 2013	< 0.1%	< 0.1%	84
% Land Protected in Pinelands Area	6%	36%*	41*
Assessed Acres of Farmland	15	2,270	119
Building Permits Issued	0	33	168
Housing Transactions	8	71	158
Average Home Sale Price	\$246,125	\$276,269	70
Equalized Property Value (millions)	\$158.6	\$1,517.6	176
Effective Tax Rate	2.15	2.46	132
Average Residential Property Tax Bill	\$4,318	\$5,698	158
Per Capita Income Estimate (2012)	\$26,268	\$31,778	148
Estimated Unemployment Rate	12.0%	9.2%	39

Private Sector Employment	126	Private Sector Establishments	23	Private Sector Avg. Annual Wages	\$39,992
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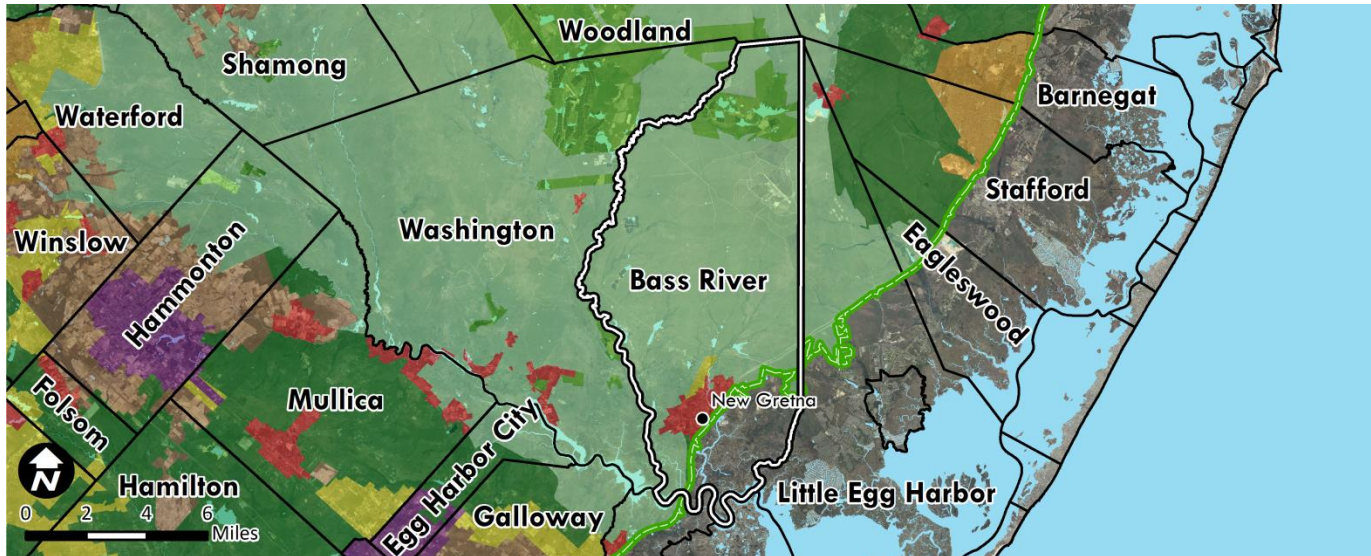


*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Bass River Township

Pinelands Area 2010 population: 1,172 (81% of total population)

Pinelands Area acreage: 43,791 (87% of total acreage)



Pinelands Management Areas

Conservation

- 87% Preservation
- < 1% Forest
- Agricultural Production
- 8% Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 4% Pinelands Village

Intermediate

- 1% Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

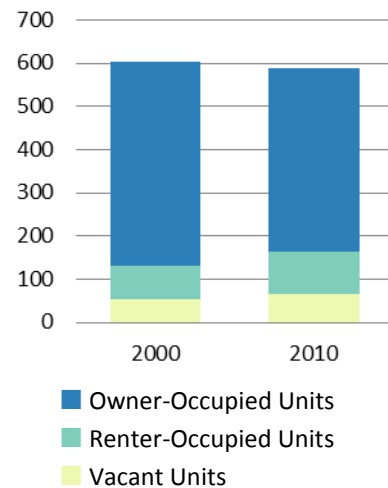
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,439	12,038	174
Population Density (per mile ²)	18	1,768	199
Population Change - 2010 to 2013	-0.3%	< 0.1%	103
% Land Protected in Pinelands Area	51%	36%*	18*
Assessed Acres of Farmland	6,959	2,270	26
Building Permits Issued	1	33	145
Housing Transactions	5	71	172
Average Home Sale Price	\$236,200	\$276,269	80
Equalized Property Value (millions)	\$176.2	\$1,517.6	172
Effective Tax Rate	1.74	2.46	164
Average Residential Property Tax Bill	\$4,455	\$5,698	154
Per Capita Income Estimate (2012)	\$27,134	\$31,778	133
Estimated Unemployment Rate	12.3%	9.2%	33

Census Housing Data Change 2000 - 2010



Private Sector Employment

Private Sector Establishments

Private Sector Avg. Annual Wages

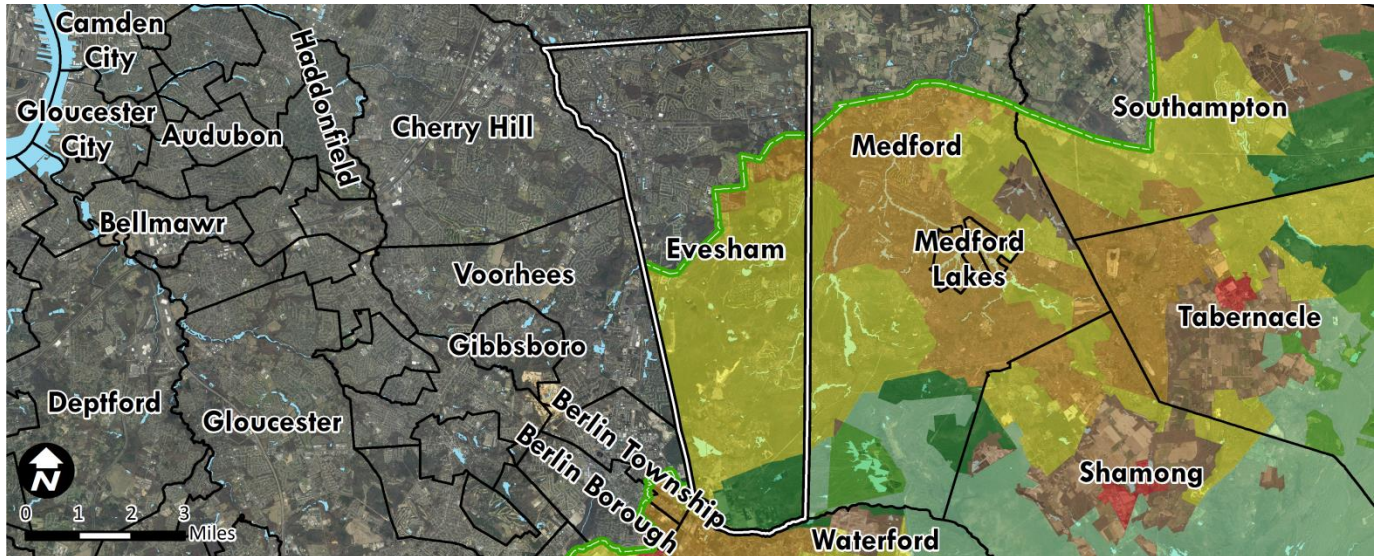
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Evesham Township

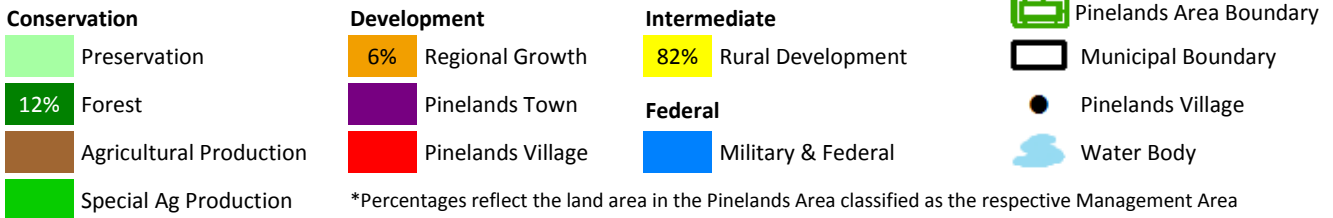


Pinelands Area 2010 population: 11,860 (26% of total population)

Pinelands Area acreage: 10,344 (55% of total acreage)

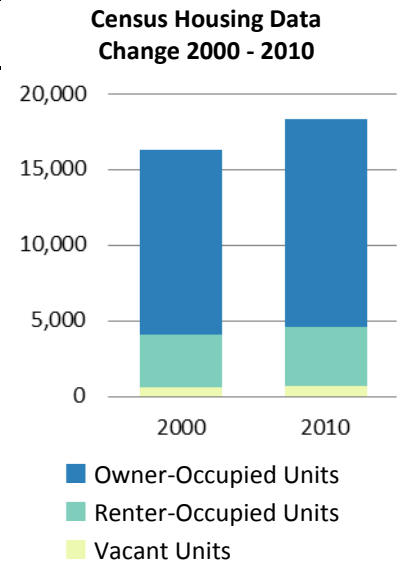


Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	45,644	12,038	10
Population Density (per mile ²)	1,550	1,768	87
Population Change - 2010 to 2013	0.2%	< 0.1%	72
% Land Protected in Pinelands Area	29%	36%*	32*
Assessed Acres of Farmland	1,326	2,270	65
Building Permits Issued	11	33	90
Housing Transactions	340	71	7
Average Home Sale Price	\$258,225	\$276,269	65
Equalized Property Value (millions)	\$5,066.2	\$1,517.6	12
Effective Tax Rate	2.52	2.46	96
Average Residential Property Tax Bill	\$6,761	\$5,698	42
Per Capita Income Estimate (2012)	\$38,010	\$31,778	40
Estimated Unemployment Rate	6.4%	9.2%	160

Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
24,809	1,393	\$51,145

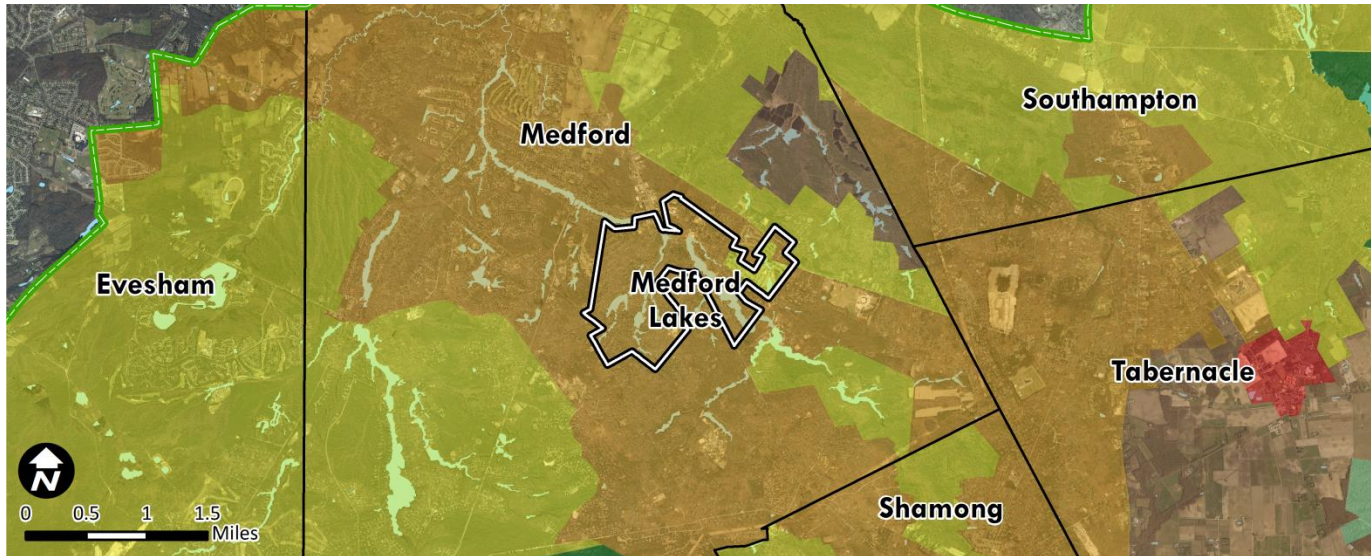


*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Medford Lakes Borough

Pinelands Area 2010 population: 4,146 (100% of total population)

Pinelands Area acreage: 812 (100% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 90% Regional Growth
- Pinelands Town
- Pinelands Village

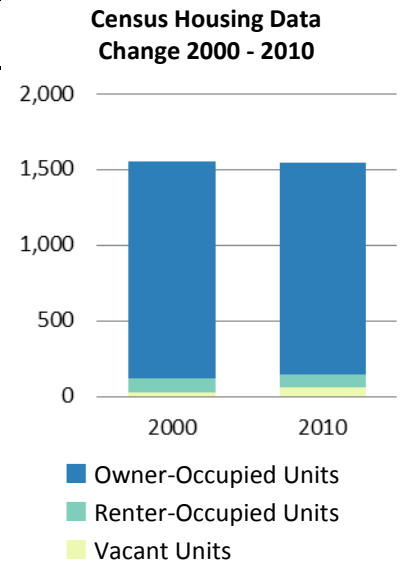
Intermediate

- 10% Rural Development
- Federal**
- Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,136	12,038	124
Population Density (per mile ²)	3,261	1,768	41
Population Change - 2010 to 2013	-0.2%	< 0.1%	99
% Land Protected in Pinelands Area	0%	36%*	46*
Assessed Acres of Farmland	0	2,270	123
Building Permits Issued	6	33	110
Housing Transactions	31	71	100
Average Home Sale Price	\$272,666	\$276,269	57
Equalized Property Value (millions)	\$460.9	\$1,517.6	123
Effective Tax Rate	2.79	2.46	69
Average Residential Property Tax Bill	\$8,244	\$5,698	17
Per Capita Income Estimate (2012)	\$42,207	\$31,778	24
Estimated Unemployment Rate	3.9%	9.2%	193



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
-	-	-

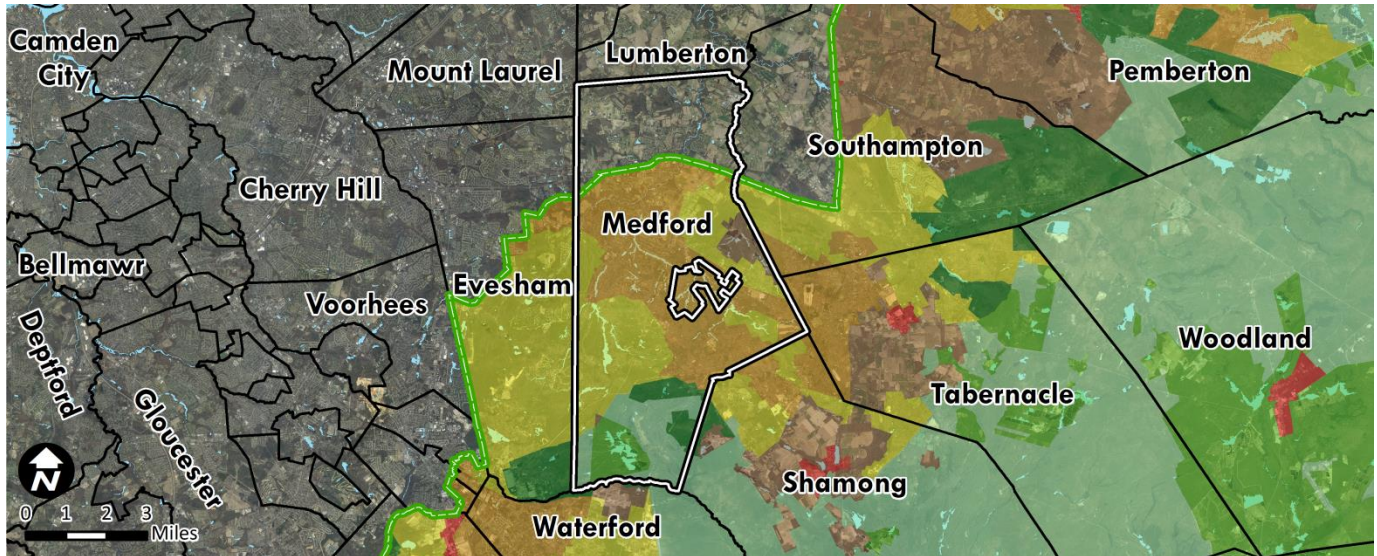
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Medford Township

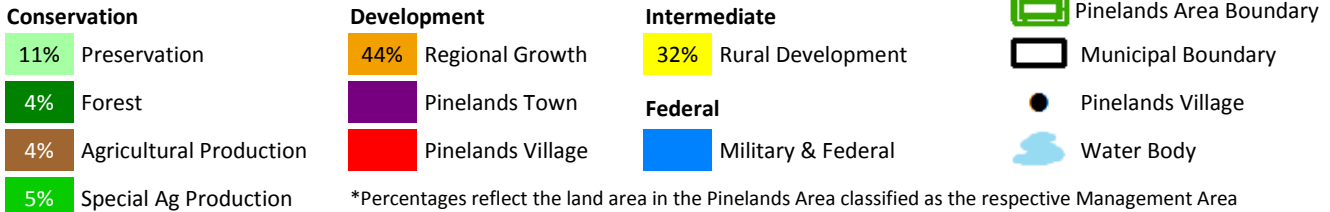


Pinelands Area 2010 population: 18,861 (82% of total population)

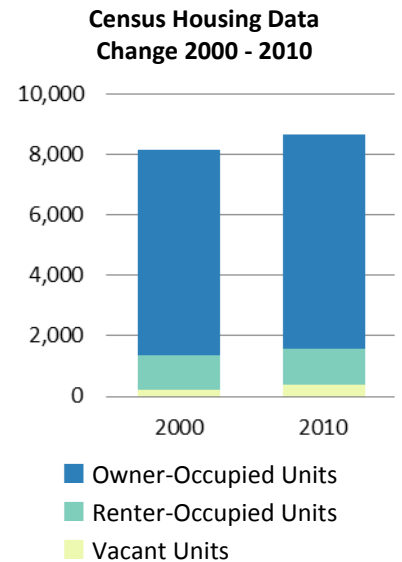
Pinelands Area acreage: 19,793 (78% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	23,281	12,038	29
Population Density (per mile ²)	585	1,768	127
Population Change - 2010 to 2013	1.1%	< 0.1%	34
% Land Protected in Pinelands Area	32%	36%*	27*
Assessed Acres of Farmland	5,715	2,270	36
Building Permits Issued	70	33	27
Housing Transactions	195	71	16
Average Home Sale Price	\$379,426	\$276,269	27
Equalized Property Value (millions)	\$3,147.8	\$1,517.6	28
Effective Tax Rate	2.72	2.46	76
Average Residential Property Tax Bill	\$9,424	\$5,698	9
Per Capita Income Estimate (2012)	\$46,285	\$31,778	17
Estimated Unemployment Rate	4.2%	9.2%	191



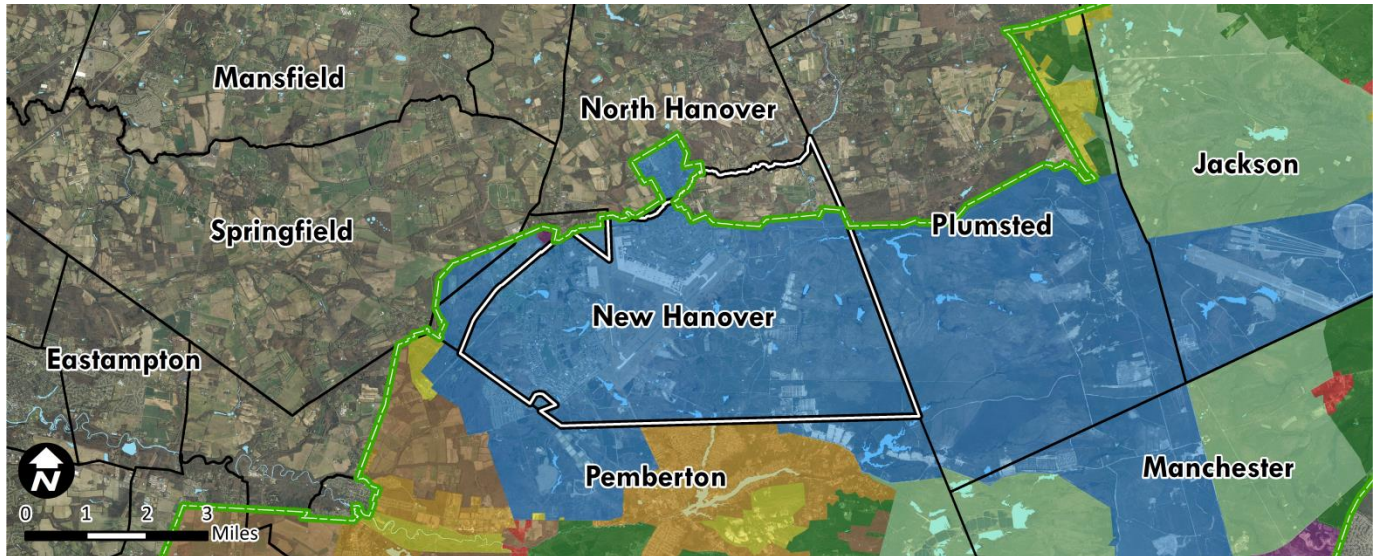
Private Sector Employment 6,478	Private Sector Establishments 754	Private Sector Avg. Annual Wages \$37,459
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

New Hanover Township

Pinelands Area 2010 population: 6,692 (91% of total population)

Pinelands Area acreage: 13,016 (91% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- Rural Development

Federal

- 100% Military & Federal

Pinelands Area Boundary

Municipal Boundary

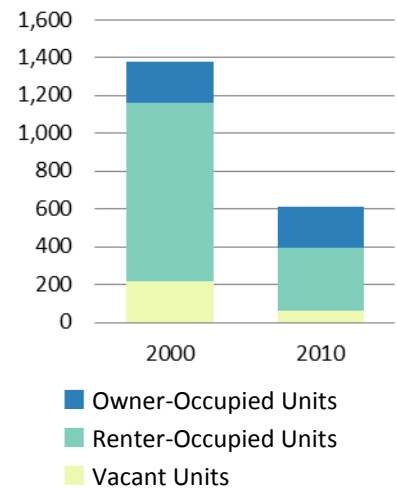
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,942	12,038	85
Population Density (per mile ²)	354	1,768	148
Population Change - 2010 to 2013	7.5%	< 0.1%	3
% Land Protected in Pinelands Area	0%	36%*	46*
Assessed Acres of Farmland	932	2,270	70
Building Permits Issued	0	33	168
Housing Transactions	3	71	189
Average Home Sale Price	\$181,000	\$276,269	124
Equalized Property Value (millions)	\$70.9	\$1,517.6	193
Effective Tax Rate	1.83	2.46	159
Average Residential Property Tax Bill	\$3,793	\$5,698	178
Per Capita Income Estimate (2012)	\$31,371	\$31,778	88
Estimated Unemployment Rate	7.4%	9.2%	137

Census Housing Data Change 2000 - 2010



Private Sector Employment	1,272	Private Sector Establishments	125	Private Sector Avg. Annual Wages	\$43,628
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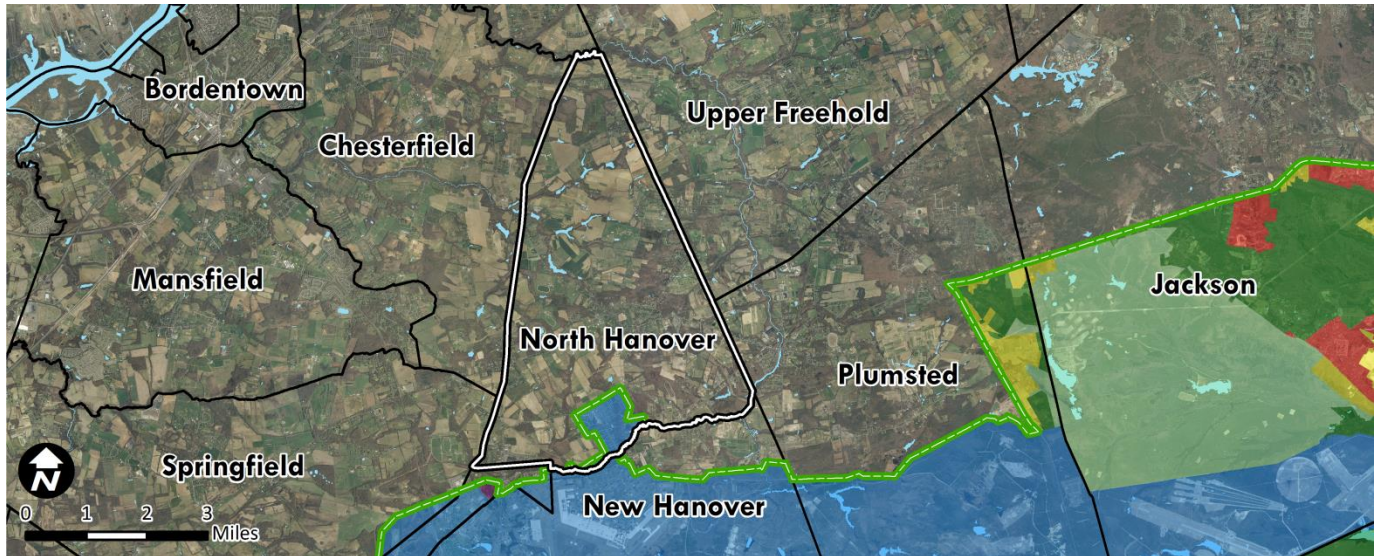
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

North Hanover Township

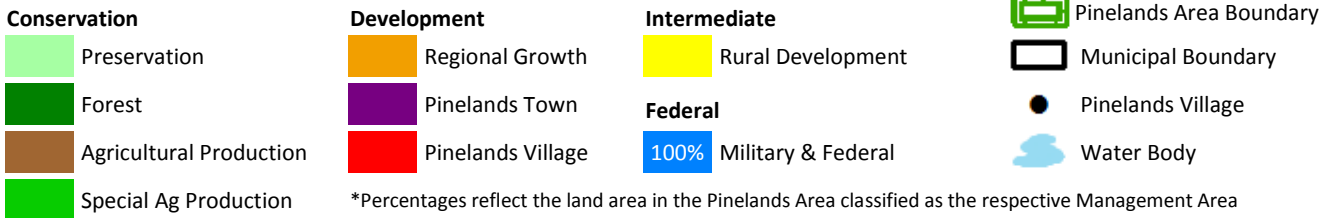


Pinelands Area 2010 population: 2,973 (39% of total population)

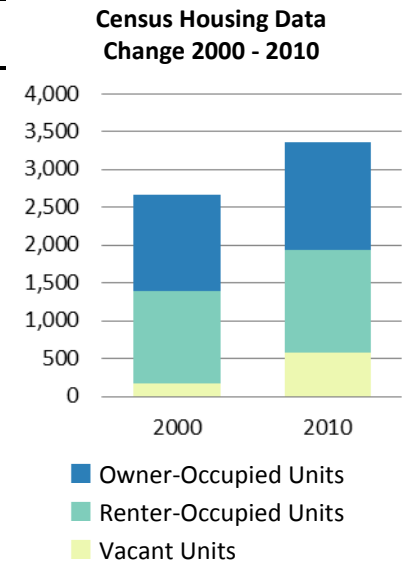
Pinelands Area acreage: 477 (4% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,669	12,038	87
Population Density (per mile ²)	439	1,768	138
Population Change - 2010 to 2013	-0.1%	< 0.1%	93
% Land Protected in Pinelands Area	0%	36%*	46*
Assessed Acres of Farmland	7,181	2,270	23
Building Permits Issued	15	33	71
Housing Transactions	13	71	140
Average Home Sale Price	\$303,962	\$276,269	42
Equalized Property Value (millions)	\$408.9	\$1,517.6	131
Effective Tax Rate	1.83	2.46	158
Average Residential Property Tax Bill	\$5,935	\$5,698	75
Per Capita Income Estimate (2012)	\$24,493	\$31,778	158
Estimated Unemployment Rate	10.4%	9.2%	64



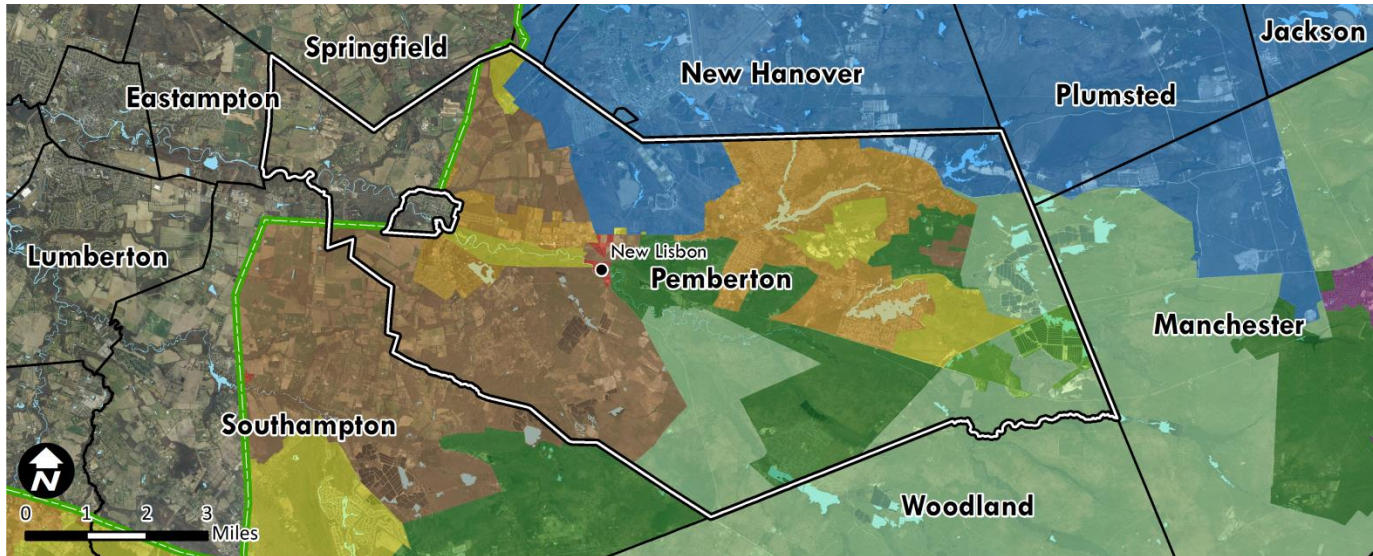
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
354	70	\$44,018

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Pemberton Township

Pinelands Area 2010 population: 27,394 (98% of total population)

Pinelands Area acreage: 36,722 (91% of total acreage)



Pinelands Management Areas

Conservation

- 20% Preservation
- 16% Forest
- 25% Agricultural Production
- 3% Special Ag Production

Development

- 19% Regional Growth
- Pinelands Town
- < 1% Pinelands Village

Intermediate

- 7% Rural Development

Federal

- 12% Military & Federal

Pinelands Area Boundary

Municipal Boundary

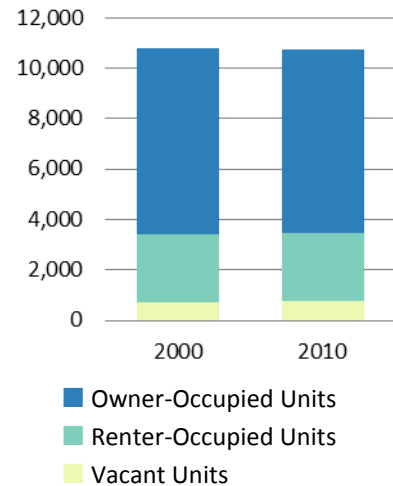
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	27,914	12,038	25
Population Density (per mile ²)	444	1,768	137
Population Change - 2010 to 2013	< 0.1%	< 0.1%	85
% Land Protected in Pinelands Area	41%	36%*	24*
Assessed Acres of Farmland	10,652	2,270	11
Building Permits Issued	13	33	81
Housing Transactions	104	71	49
Average Home Sale Price	\$160,391	\$276,269	152
Equalized Property Value (millions)	\$1,479.5	\$1,517.6	58
Effective Tax Rate	1.98	2.46	151
Average Residential Property Tax Bill	\$3,424	\$5,698	193
Per Capita Income Estimate (2012)	\$23,601	\$31,778	166
Estimated Unemployment Rate	9.7%	9.2%	75

Census Housing Data Change 2000 - 2010



Private Sector Employment	2,330	Private Sector Establishments	205	Private Sector Avg. Annual Wages	\$47,593
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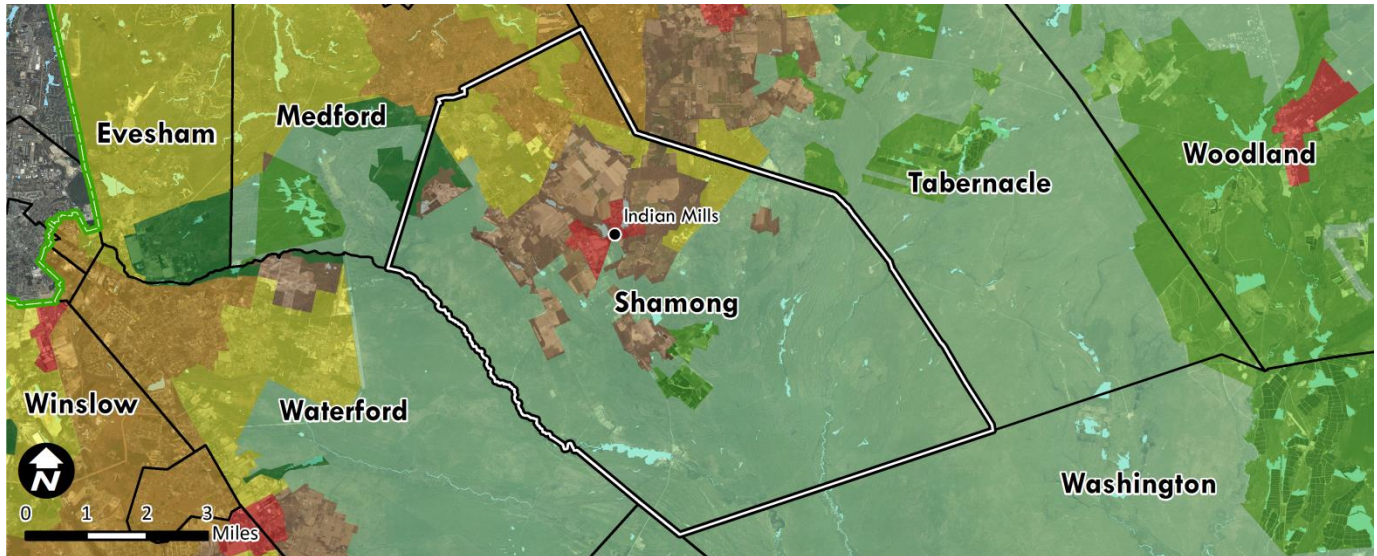
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Shamong Township



Pinelands Area 2010 population: 6,490 (100% of total population)

Pinelands Area acreage: 28,706 (100% of total acreage)



Pinelands Management Areas

Conservation

- 67% Preservation
- 1% Forest
- 15% Agricultural Production
- 2% Special Ag Production

Development

- 5% Regional Growth
- Pinelands Town
- 1% Pinelands Village

Intermediate

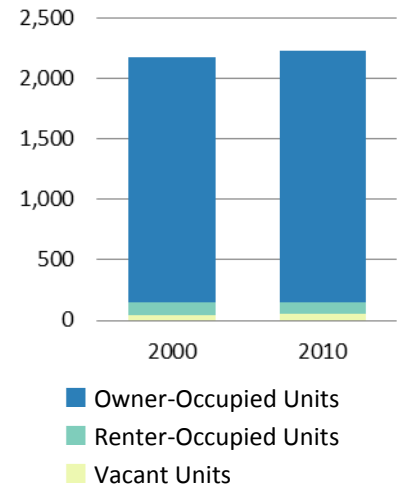
- 9% Rural Development
- Federal**
- Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,444	12,038	99
Population Density (per mile ²)	144	1,768	175
Population Change - 2010 to 2013	-0.7%	< 0.1%	153
% Land Protected in Pinelands Area	63%	36%*	13*
Assessed Acres of Farmland	4,696	2,270	43
Building Permits Issued	12	33	85
Housing Transactions	33	71	97
Average Home Sale Price	\$372,803	\$276,269	28
Equalized Property Value (millions)	\$698.9	\$1,517.6	100
Effective Tax Rate	2.30	2.46	117
Average Residential Property Tax Bill	\$7,493	\$5,698	25
Per Capita Income Estimate (2012)	\$39,502	\$31,778	34
Estimated Unemployment Rate	7.2%	9.2%	141

Census Housing Data Change 2000 - 2010



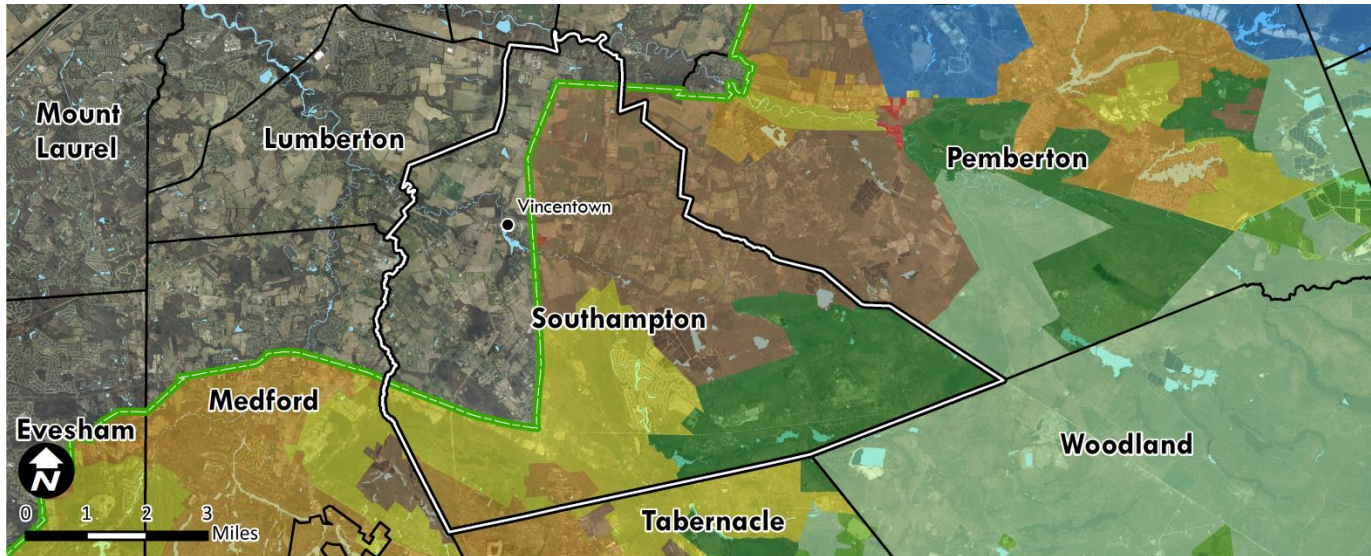
Private Sector Employment	860	Private Sector Establishments	122	Private Sector Avg. Annual Wages	\$37,928
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Southampton Township

Pinelands Area 2010 population: 7,295 (70% of total population)

Pinelands Area acreage: 20,760 (73% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 28% Forest
- 39% Agricultural Production
- Special Ag Production

Development

- 5% Regional Growth
- Pinelands Town
- <1% Pinelands Village

Intermediate

- 28% Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

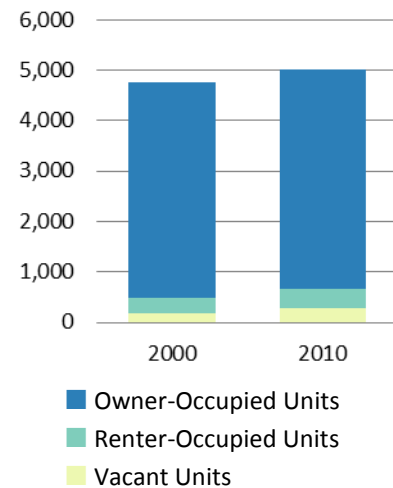
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	10,390	12,038	65
Population Density (per mile ²)	234	1,768	160
Population Change - 2010 to 2013	-0.7%	< 0.1%	151
% Land Protected in Pinelands Area	32%	36%*	29*
Assessed Acres of Farmland	12,492	2,270	8
Building Permits Issued	13	33	81
Housing Transactions	132	71	30
Average Home Sale Price	\$193,081	\$276,269	119
Equalized Property Value (millions)	\$1,086.0	\$1,517.6	79
Effective Tax Rate	2.27	2.46	120
Average Residential Property Tax Bill	\$4,814	\$5,698	128
Per Capita Income Estimate (2012)	\$32,736	\$31,778	73
Estimated Unemployment Rate	6.4%	9.2%	160

Census Housing Data Change 2000 - 2010



Private Sector Employment 2,343	Private Sector Establishments 236	Private Sector Avg. Annual Wages \$36,902
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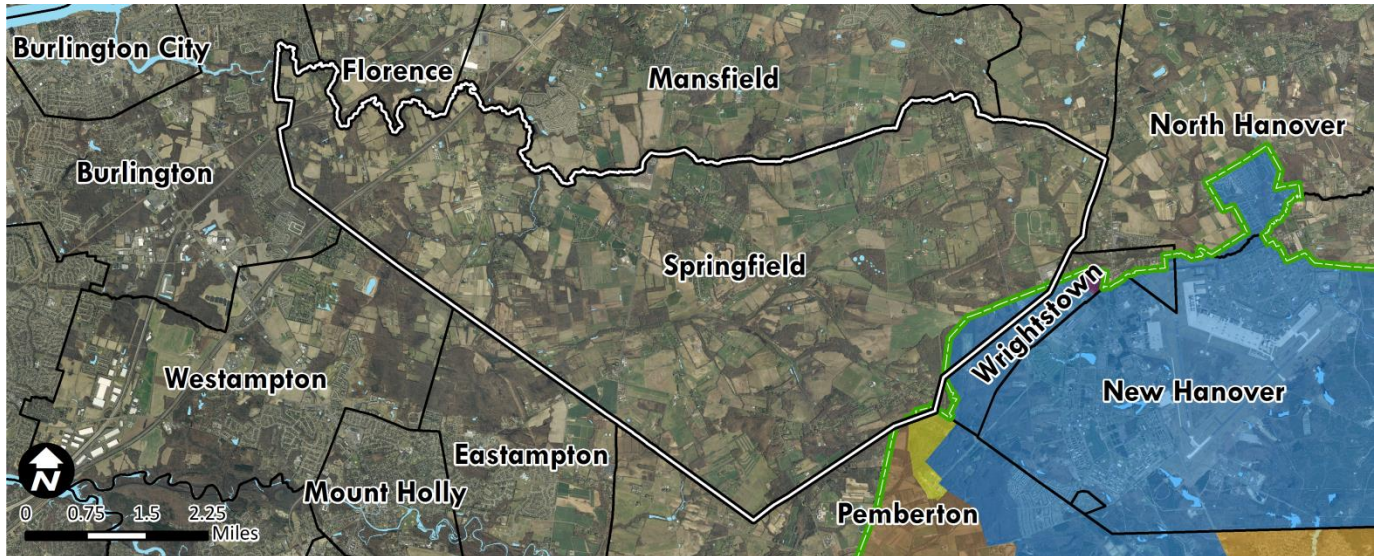
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Springfield Township

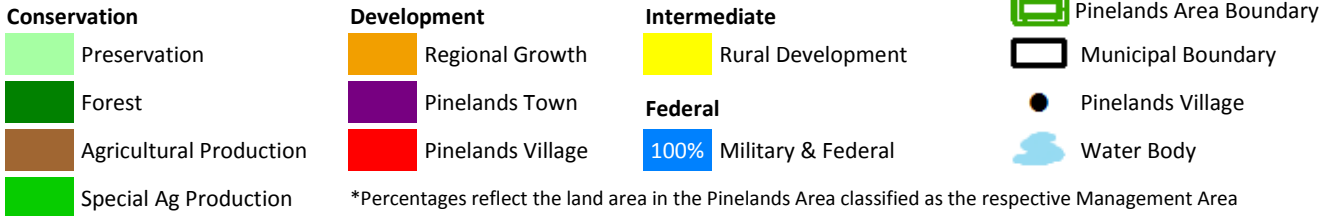


Pinelands Area 2010 population: 0 (0% of total population)

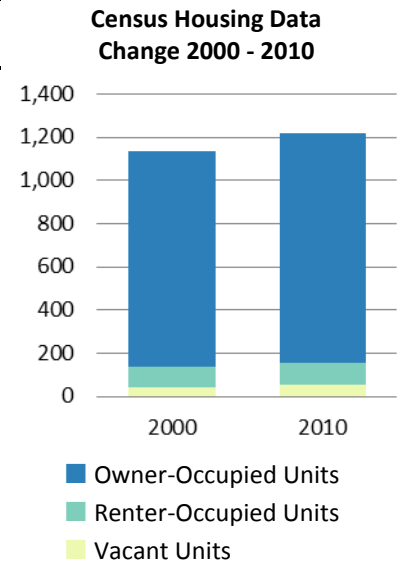
Pinelands Area acreage: 284 (1% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	3,407	12,038	135
Population Density (per mile ²)	115	1,768	179
Population Change - 2010 to 2013	-0.2%	< 0.1%	98
% Land Protected in Pinelands Area	0%	36%*	46*
Assessed Acres of Farmland	11,735	2,270	10
Building Permits Issued	3	33	124
Housing Transactions	19	71	123
Average Home Sale Price	\$263,286	\$276,269	63
Equalized Property Value (millions)	\$399.3	\$1,517.6	132
Effective Tax Rate	2.51	2.46	100
Average Residential Property Tax Bill	\$7,423	\$5,698	29
Per Capita Income Estimate (2012)	\$38,340	\$31,778	37
Estimated Unemployment Rate	6.1%	9.2%	170



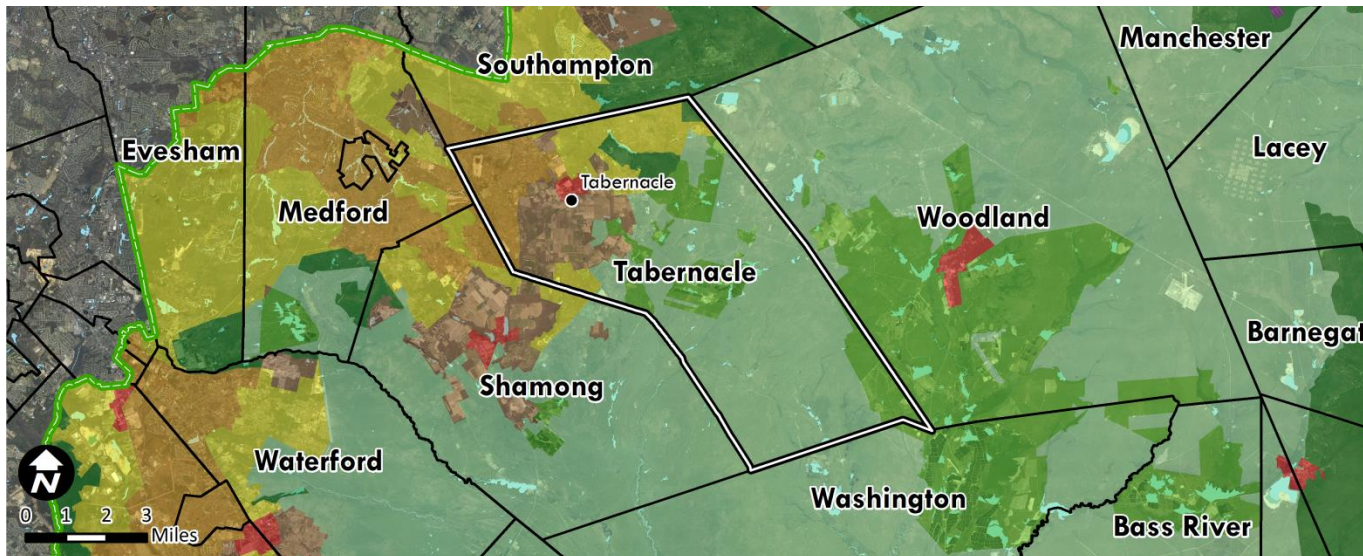
Private Sector Employment 287	Private Sector Establishments 45	Private Sector Avg. Annual Wages \$49,134
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Tabernacle Township

Pinelands Area 2010 population: 6,949 (100% of total population)

Pinelands Area acreage: 31,495 (100% of total acreage)



Pinelands Management Areas

Conservation

- 52% Preservation
- 3% Forest
- 11% Agricultural Production
- 15% Special Ag Production

Development

- 9% Regional Growth
- Pinelands Town
- 1% Pinelands Village

Intermediate

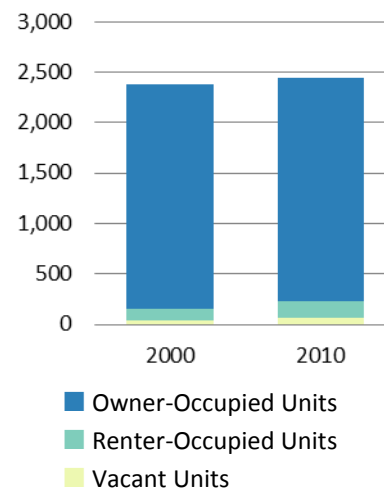
- 10% Rural Development
- Federal**
- Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,970	12,038	95
Population Density (per mile ²)	142	1,768	176
Population Change - 2010 to 2013	0.3%	< 0.1%	68
% Land Protected in Pinelands Area	46%	36%*	23*
Assessed Acres of Farmland	9,663	2,270	13
Building Permits Issued	2	33	131
Housing Transactions	46	71	77
Average Home Sale Price	\$280,607	\$276,269	49
Equalized Property Value (millions)	\$700.3	\$1,517.6	99
Effective Tax Rate	2.30	2.46	115
Average Residential Property Tax Bill	\$6,643	\$5,698	51
Per Capita Income Estimate (2012)	\$36,796	\$31,778	48
Estimated Unemployment Rate	5.8%	9.2%	174

Census Housing Data Change 2000 - 2010



Private Sector Employment	726	Private Sector Establishments	147	Private Sector Avg. Annual Wages	\$29,493
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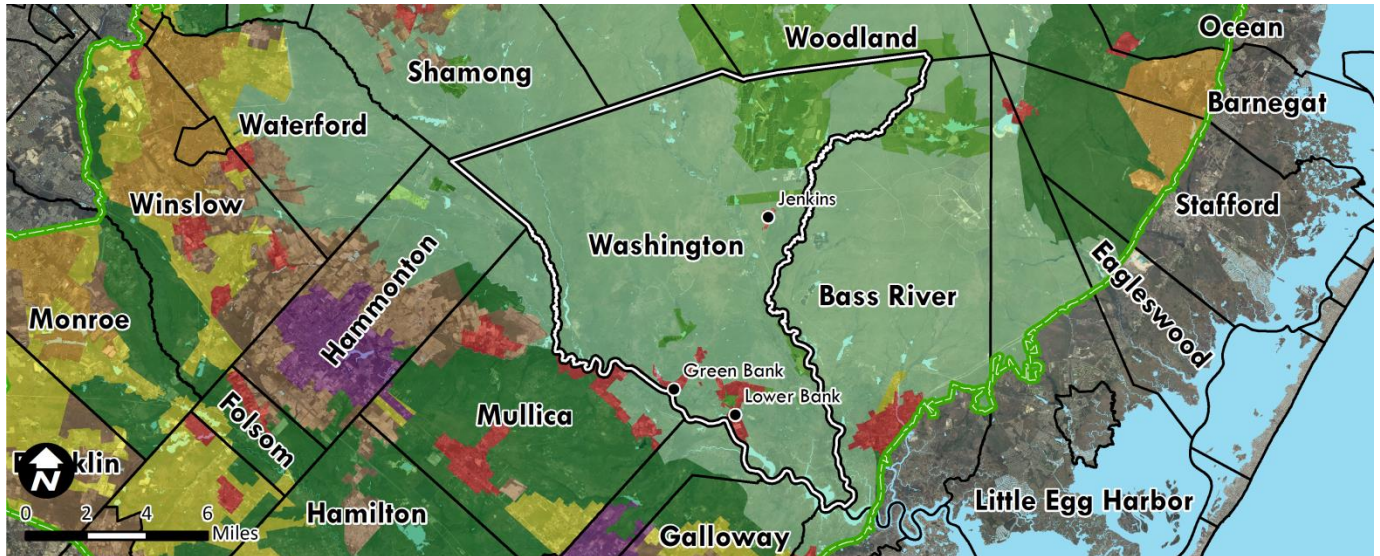
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Washington Township

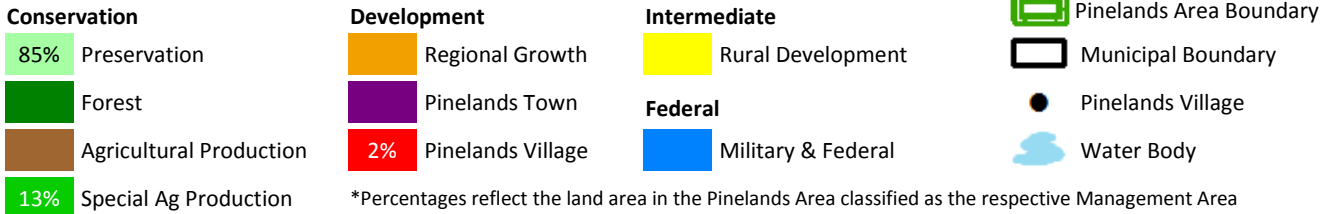


Pinelands Area 2010 population: 687 (100% of total population)

Pinelands Area acreage: 66,774 (100% of total acreage)

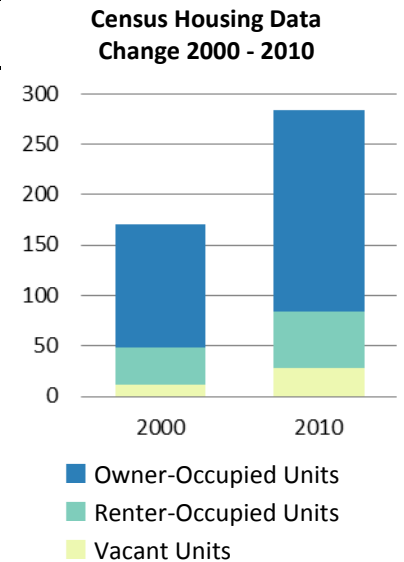


Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	684	12,038	192
Population Density (per mile ²)	7	1,768	202
Population Change - 2010 to 2013	-0.4%	< 0.1%	117
% Land Protected in Pinelands Area	86%	36%*	3*
Assessed Acres of Farmland	8,153	2,270	21
Building Permits Issued	2	33	131
Housing Transactions	1	71	198
Average Home Sale Price	\$285,000	\$276,269	47
Equalized Property Value (millions)	\$95.6	\$1,517.6	191
Effective Tax Rate	1.31	2.46	180
Average Residential Property Tax Bill	\$3,466	\$5,698	191
Per Capita Income Estimate (2012)	\$27,151	\$31,778	132
Estimated Unemployment Rate	1.6%	9.2%	199

Private Sector Employment	52	Private Sector Establishments	16	Private Sector Avg. Annual Wages	\$44,153
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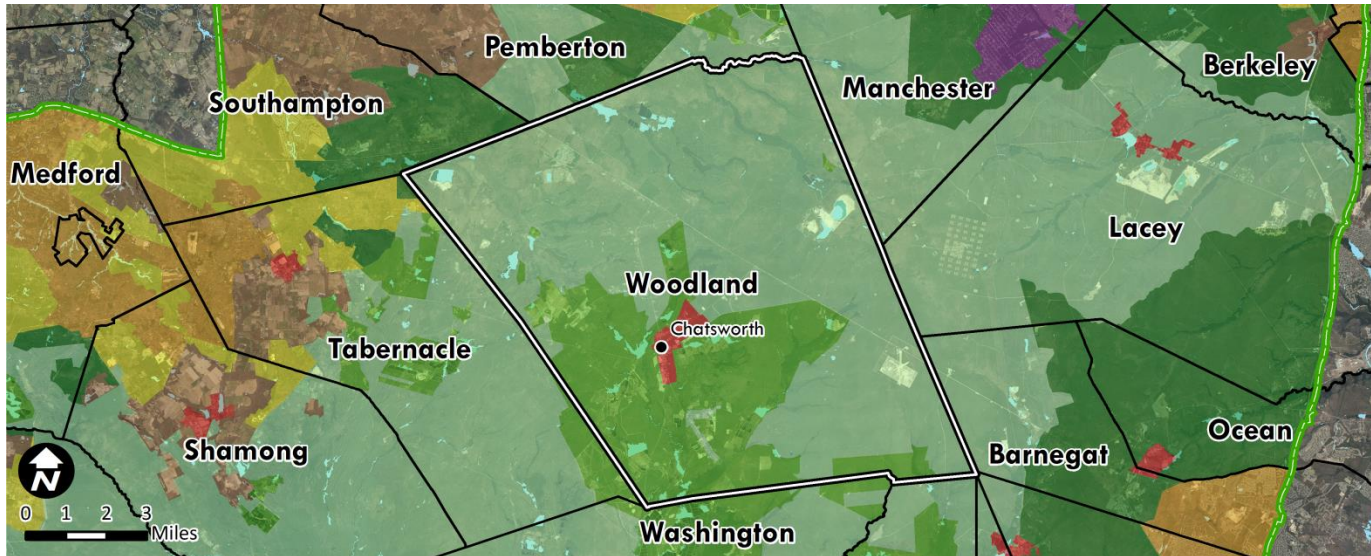
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Woodland Township



Pinelands Area 2010 population: 1,788 (100% of total population)

Pinelands Area acreage: 60,523 (100% of total acreage)



Pinelands Management Areas

Conservation

- 70% Preservation
- Forest
- Agricultural Production
- 29% Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 1% Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

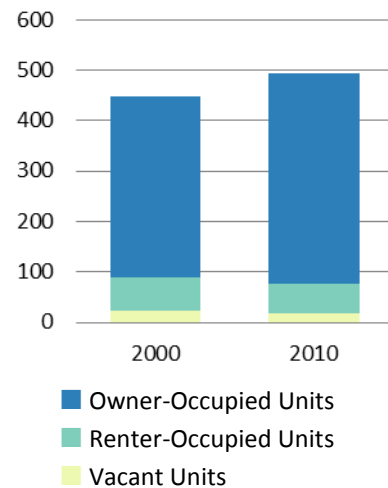
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,797	12,038	164
Population Density (per mile ²)	19	1,768	198
Population Change - 2010 to 2013	0.5%	< 0.1%	57
% Land Protected in Pinelands Area	77%	36%*	6*
Assessed Acres of Farmland	8,410	2,270	19
Building Permits Issued	0	33	168
Housing Transactions	7	71	164
Average Home Sale Price	\$310,843	\$276,269	38
Equalized Property Value (millions)	\$136.7	\$1,517.6	180
Effective Tax Rate	1.91	2.46	153
Average Residential Property Tax Bill	\$4,558	\$5,698	144
Per Capita Income Estimate (2012)	\$35,116	\$31,778	56
Estimated Unemployment Rate	5.5%	9.2%	179

Census Housing Data Change 2000 - 2010



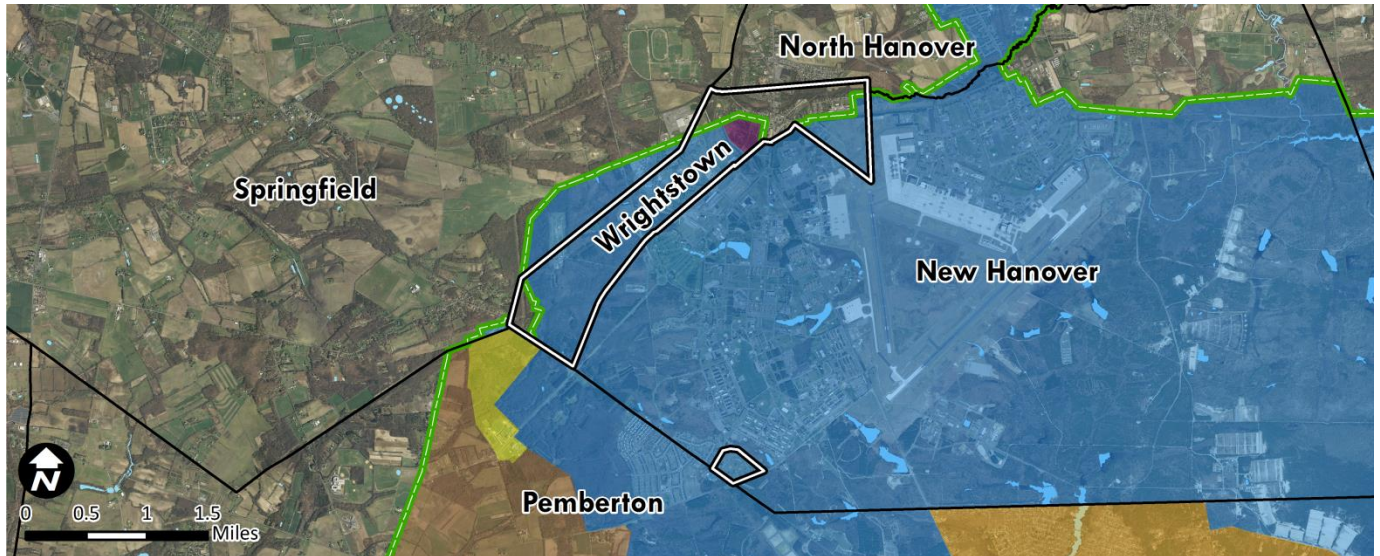
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
250	24	\$44,300

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Wrightstown Borough

Pinelands Area 2010 population: 81 (10% of total population)

Pinelands Area acreage: 897 (76% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- 6% Pinelands Town
- Pinelands Village

Intermediate

- Rural Development
- Federal**
- 94% Military & Federal

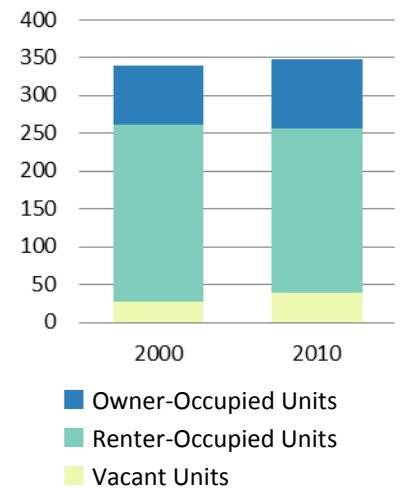
- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	798	12,038	191
Population Density (per mile ²)	433	1,768	139
Population Change - 2010 to 2013	-0.5%	< 0.1%	130
% Land Protected in Pinelands Area	0%	36%*	46*
Assessed Acres of Farmland	24	2,270	114
Building Permits Issued	0	33	168
Housing Transactions	4	71	181
Average Home Sale Price	\$205,000	\$276,269	105
Equalized Property Value (millions)	\$40.3	\$1,517.6	198
Effective Tax Rate	2.62	2.46	87
Average Residential Property Tax Bill	\$3,993	\$5,698	174
Per Capita Income Estimate (2012)	\$20,288	\$31,778	188
Estimated Unemployment Rate	8.9%	9.2%	98

Private Sector Employment	609	Private Sector Establishments	70	Private Sector Avg. Annual Wages	\$32,602
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Census Housing Data Change 2000 - 2010



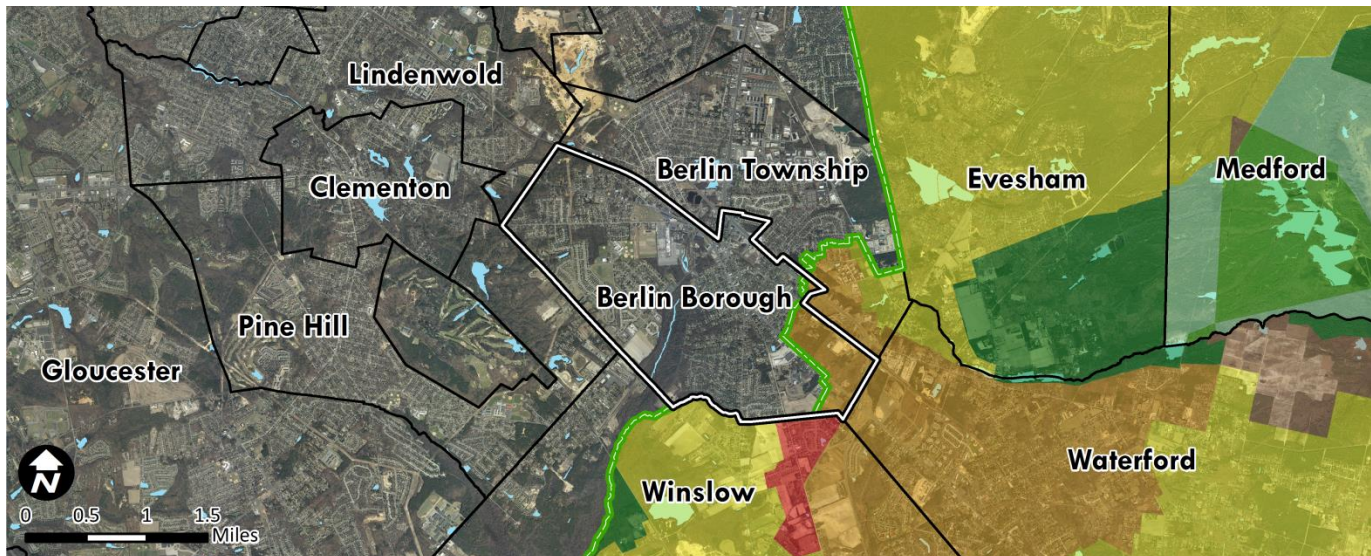
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Berlin Borough



Pinelands Area 2010 population: 76 (1% of total population)

Pinelands Area acreage: 233 (10% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 100% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

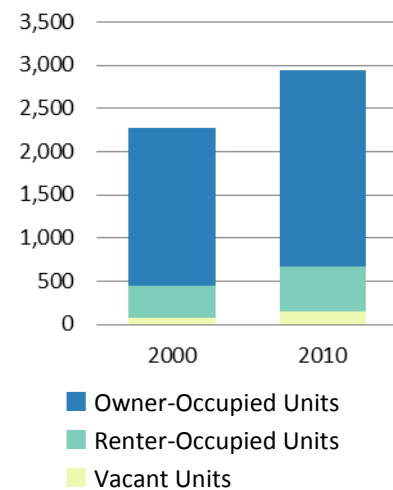
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,600	12,038	90
Population Density (per mile ²)	2,088	1,768	72
Population Change - 2010 to 2013	0.2%	< 0.1%	76
% Land Protected in Pinelands Area	0%	36%*	46*
Assessed Acres of Farmland	93	2,270	105
Building Permits Issued	1	33	145
Housing Transactions	54	71	71
Average Home Sale Price	\$243,439	\$276,269	71
Equalized Property Value (millions)	\$742.5	\$1,517.6	96
Effective Tax Rate	2.83	2.46	67
Average Residential Property Tax Bill	\$6,733	\$5,698	44
Per Capita Income Estimate (2012)	\$32,263	\$31,778	80
Estimated Unemployment Rate	6.2%	9.2%	168

Census Housing Data Change 2000 - 2010



Private Sector Employment 4,211	Private Sector Establishments 350	Private Sector Avg. Annual Wages \$39,304
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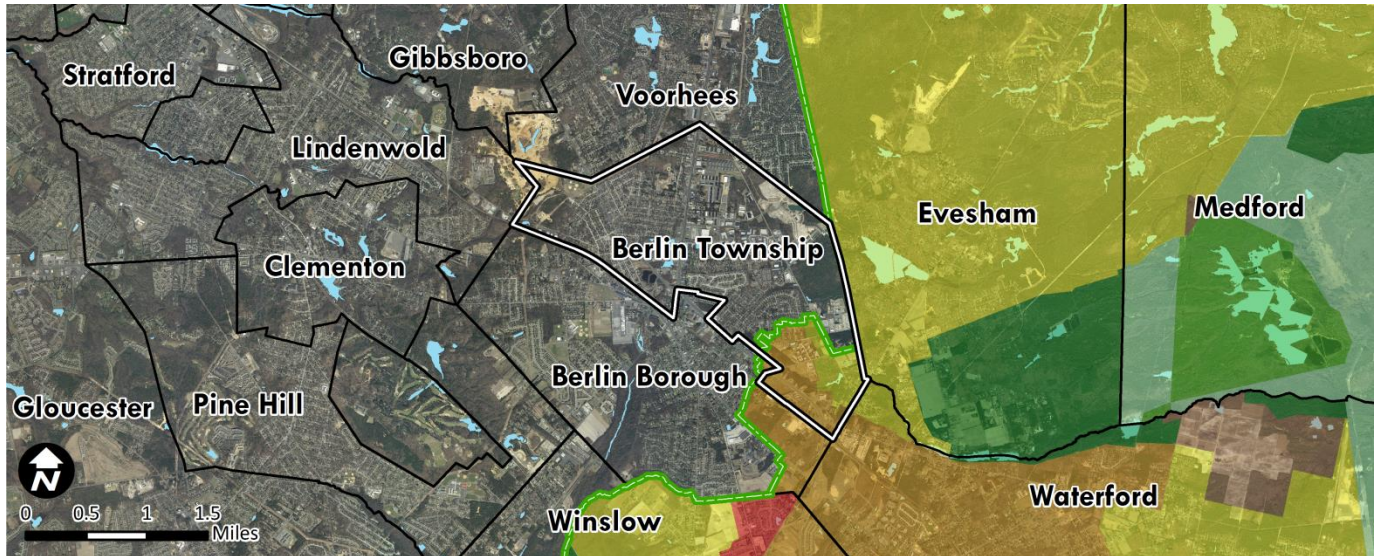
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Berlin Township



Pinelands Area 2010 population: 303 (6% of total population)

Pinelands Area acreage: 347 (16% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 64% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- 36% Rural Development
- Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

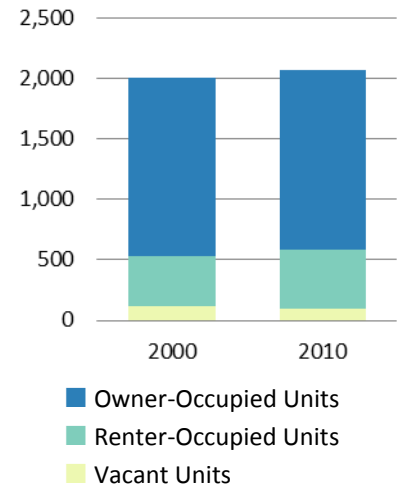


Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	5,362	12,038	107
Population Density (per mile ²)	1,631	1,768	82
Population Change - 2010 to 2013	0.1%	< 0.1%	81
% Land Protected in Pinelands Area	0%	36%*	46*
Assessed Acres of Farmland	50	2,270	109
Building Permits Issued	24	33	59
Housing Transactions	16	71	131
Average Home Sale Price	\$174,869	\$276,269	131
Equalized Property Value (millions)	\$548.9	\$1,517.6	112
Effective Tax Rate	3.44	2.46	28
Average Residential Property Tax Bill	\$5,775	\$5,698	83
Per Capita Income Estimate (2012)	\$29,140	\$31,778	109
Estimated Unemployment Rate	10.4%	9.2%	64

Census Housing Data Change 2000 - 2010



Private Sector Employment
4,879

Private Sector Establishments
368

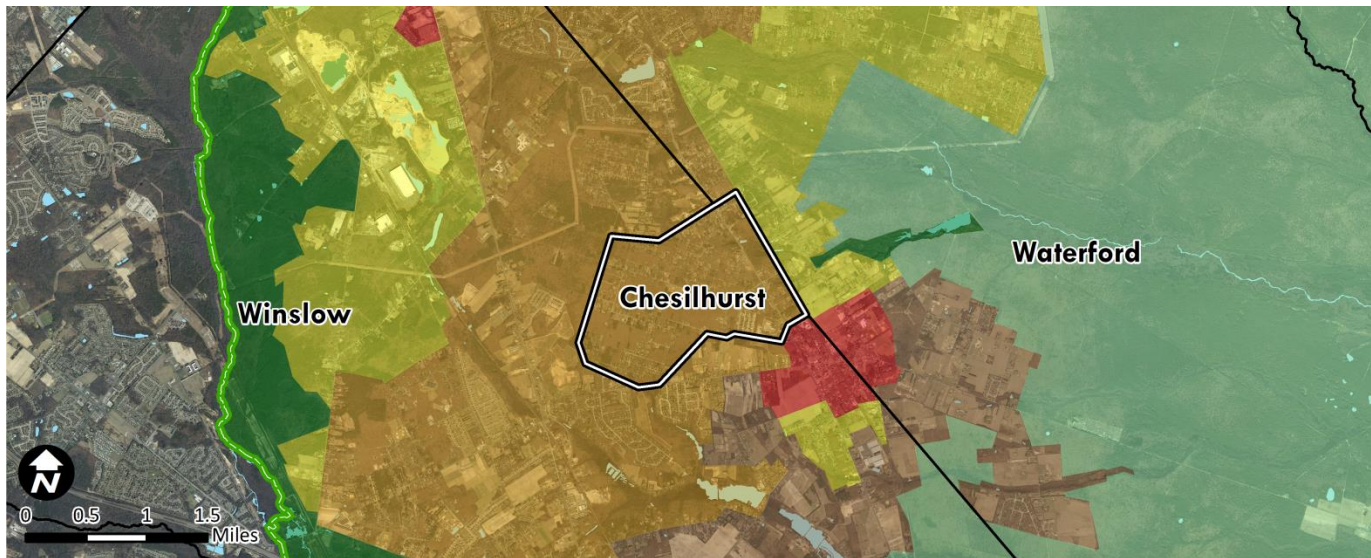
Private Sector Avg. Annual Wages
\$38,083

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Chesilhurst Borough

Pinelands Area 2010 population: 1,634 (100% of total population)

Pinelands Area acreage: 1,105 (100% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 100% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

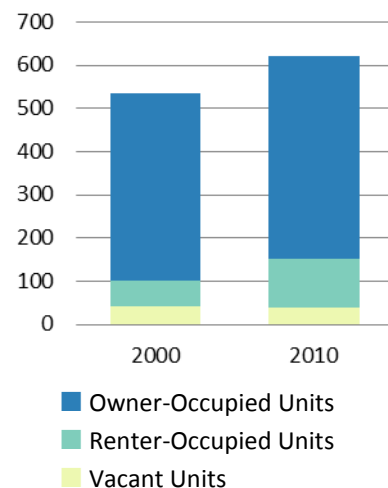
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,637	12,038	169
Population Density (per mile ²)	948	1,768	107
Population Change - 2010 to 2013	0.2%	< 0.1%	75
% Land Protected in Pinelands Area	< 1%	36%*	45*
Assessed Acres of Farmland	0	2,270	123
Building Permits Issued	1	33	145
Housing Transactions	3	71	189
Average Home Sale Price	\$126,333	\$276,269	184
Equalized Property Value (millions)	\$82.8	\$1,517.6	192
Effective Tax Rate	3.04	2.46	47
Average Residential Property Tax Bill	\$4,964	\$5,698	120
Per Capita Income Estimate (2012)	\$23,109	\$31,778	172
Estimated Unemployment Rate	15.7%	9.2%	12

Census Housing Data Change 2000 - 2010



Private Sector Employment

Private Sector Establishments

Private Sector Avg. Annual Wages

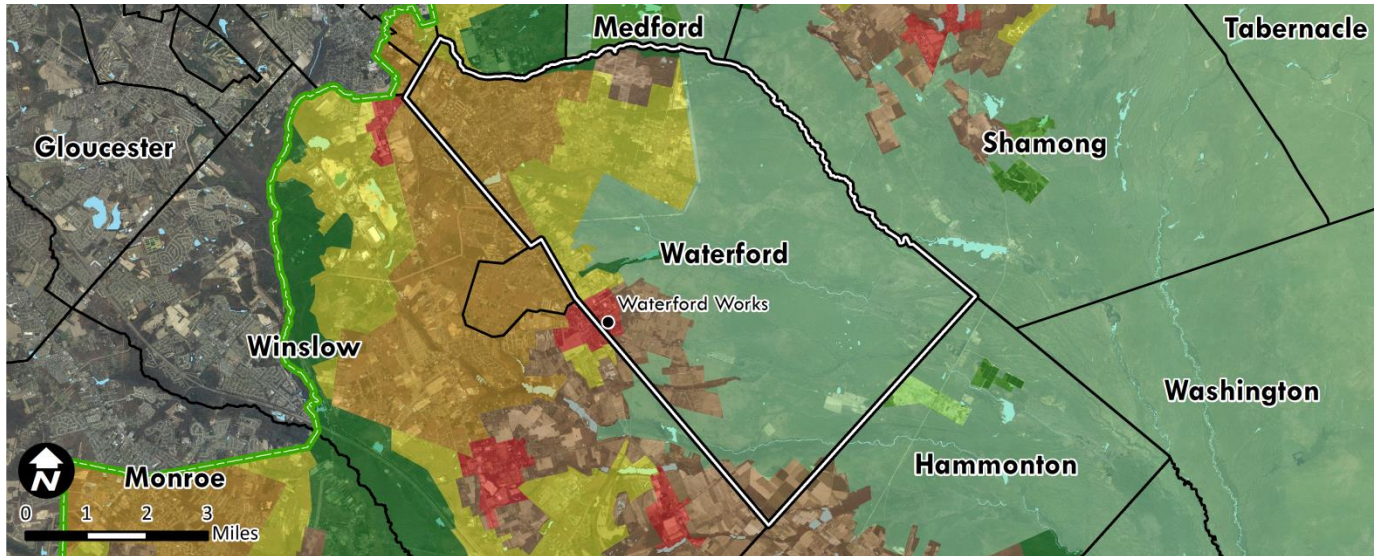
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Waterford Township



Pinelands Area 2010 population: 10,649 (100% of total population)

Pinelands Area acreage: 23,176 (100% of total acreage)



Pinelands Management Areas

Conservation

- 61% Preservation
- 1% Forest
- 10% Agricultural Production
- Special Ag Production

Development

- 11% Regional Growth
- Pinelands Town
- 1% Pinelands Village

Intermediate

- 15% Rural Development
- Federal
- Military & Federal

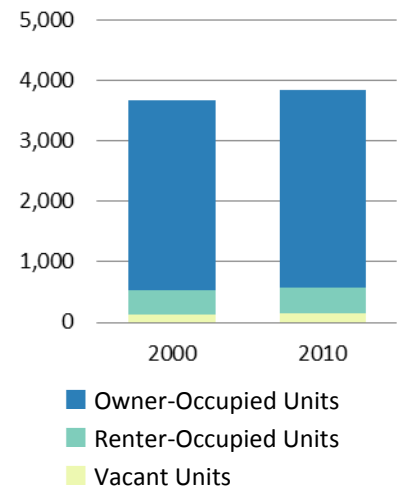
- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	10,792	12,038	61
Population Density (per mile ²)	298	1,768	151
Population Change - 2010 to 2013	1.3%	< 0.1%	27
% Land Protected in Pinelands Area	65%	36%*	12*
Assessed Acres of Farmland	2,541	2,270	55
Building Permits Issued	36	33	46
Housing Transactions	52	71	74
Average Home Sale Price	\$165,535	\$276,269	143
Equalized Property Value (millions)	\$768.7	\$1,517.6	95
Effective Tax Rate	3.16	2.46	43
Average Residential Property Tax Bill	\$6,311	\$5,698	60
Per Capita Income Estimate (2012)	\$27,600	\$31,778	126
Estimated Unemployment Rate	9.0%	9.2%	93

Private Sector Employment	1,770	Private Sector Establishments	214	Private Sector Avg. Annual Wages	\$30,737
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Census Housing Data Change 2000 - 2010

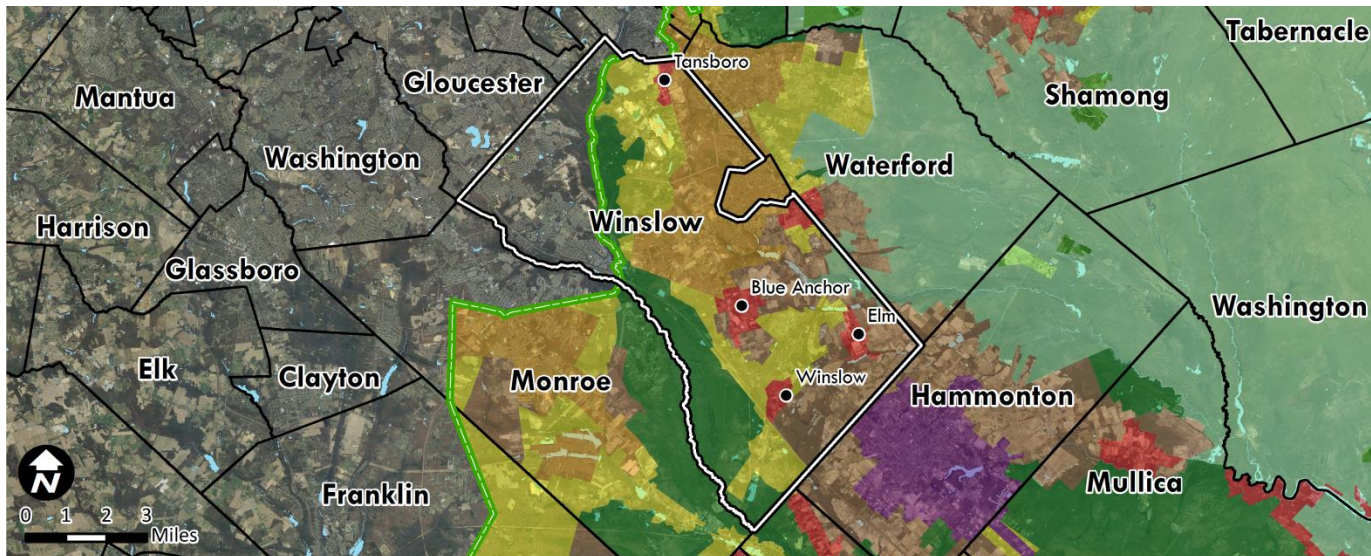


*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

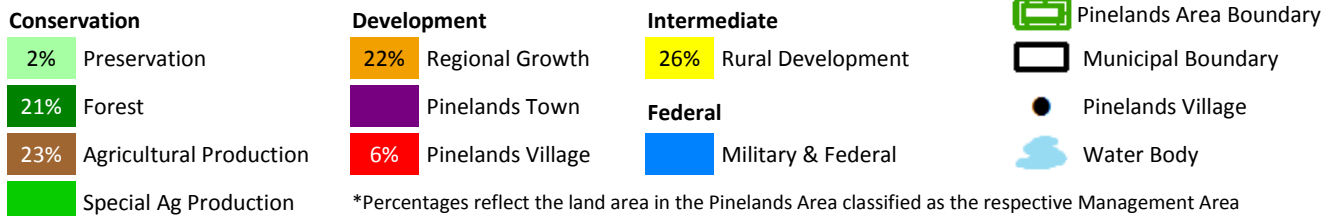
Winslow Township

Pinelands Area 2010 population: 17,813 (45% of total population)

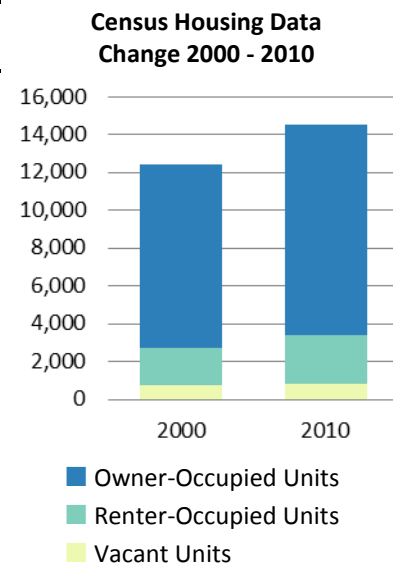
Pinelands Area acreage: 30,096 (81% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	39,165	12,038	16
Population Density (per mile ²)	671	1,768	123
Population Change - 2010 to 2013	-0.8%	< 0.1%	160
% Land Protected in Pinelands Area	30%	36%*	31*
Assessed Acres of Farmland	6,853	2,270	28
Building Permits Issued	0	33	168
Housing Transactions	163	71	20
Average Home Sale Price	\$177,934	\$276,269	127
Equalized Property Value (millions)	\$2,570.0	\$1,517.6	35
Effective Tax Rate	3.09	2.46	44
Average Residential Property Tax Bill	\$5,497	\$5,698	89
Per Capita Income Estimate (2012)	\$27,713	\$31,778	124
Estimated Unemployment Rate	9.5%	9.2%	79



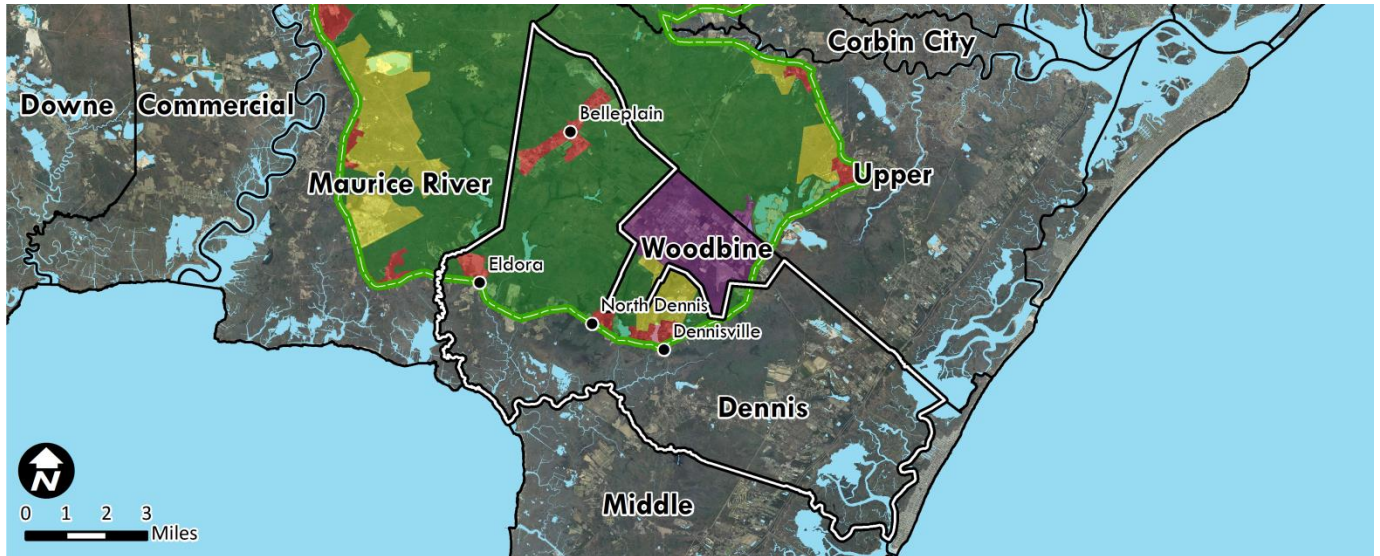
Private Sector Employment 5,458	Private Sector Establishments 592	Private Sector Avg. Annual Wages \$33,703
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

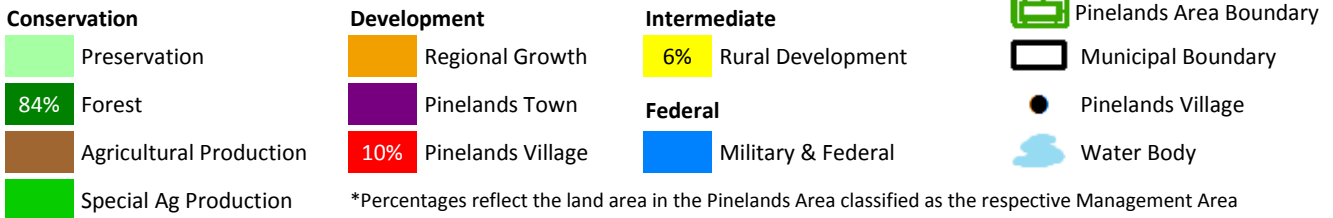
Dennis Township

Pinelands Area 2010 population: 1,570 (24% of total population)

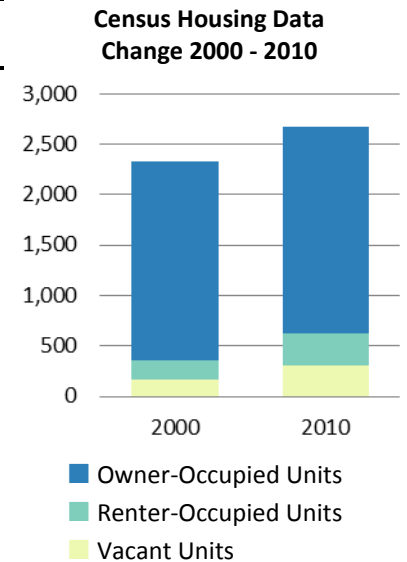
Pinelands Area acreage: 15,697 (38% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,344	12,038	100
Population Density (per mile ²)	99	1,768	184
Population Change - 2010 to 2013	-1.9%	< 0.1%	192
% Land Protected in Pinelands Area	68%	36%*	10*
Assessed Acres of Farmland	4,244	2,270	44
Building Permits Issued	11	33	90
Housing Transactions	38	71	87
Average Home Sale Price	\$249,884	\$276,269	68
Equalized Property Value (millions)	\$849.9	\$1,517.6	89
Effective Tax Rate	1.49	2.46	174
Average Residential Property Tax Bill	\$2,887	\$5,698	196
Per Capita Income Estimate (2012)	\$28,558	\$31,778	112
Estimated Unemployment Rate	8.2%	9.2%	115



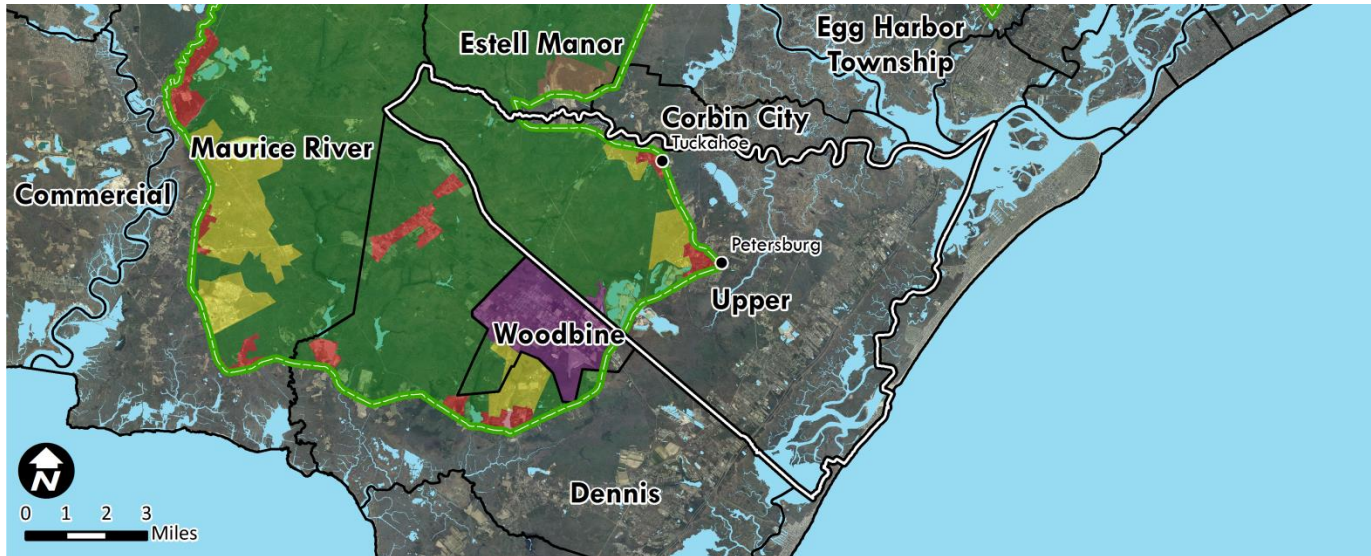
Private Sector Employment 1,547	Private Sector Establishments 182	Private Sector Avg. Annual Wages \$35,550
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Upper Township

Pinelands Area 2010 population: 1,306 (11% of total population)

Pinelands Area acreage: 14,322 (33% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 87% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- 1% Pinelands Town
- 4% Pinelands Village

Intermediate

- 8% Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

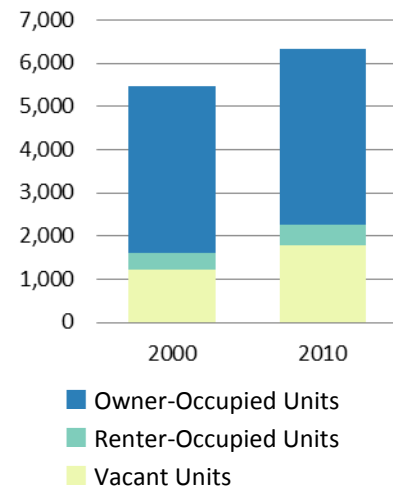
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	12,187	12,038	53
Population Density (per mile ²)	177	1,768	171
Population Change - 2010 to 2013	-1.5%	< 0.1%	180
% Land Protected in Pinelands Area	51%	36%*	17*
Assessed Acres of Farmland	2,283	2,270	59
Building Permits Issued	15	33	71
Housing Transactions	106	71	46
Average Home Sale Price	\$314,707	\$276,269	37
Equalized Property Value (millions)	\$1,924.0	\$1,517.6	48
Effective Tax Rate	1.49	2.46	175
Average Residential Property Tax Bill	\$4,511	\$5,698	147
Per Capita Income Estimate (2012)	\$35,120	\$31,778	55
Estimated Unemployment Rate	9.5%	9.2%	79

Census Housing Data Change 2000 - 2010



Private Sector Employment 2,433	Private Sector Establishments 269	Private Sector Avg. Annual Wages \$36,127
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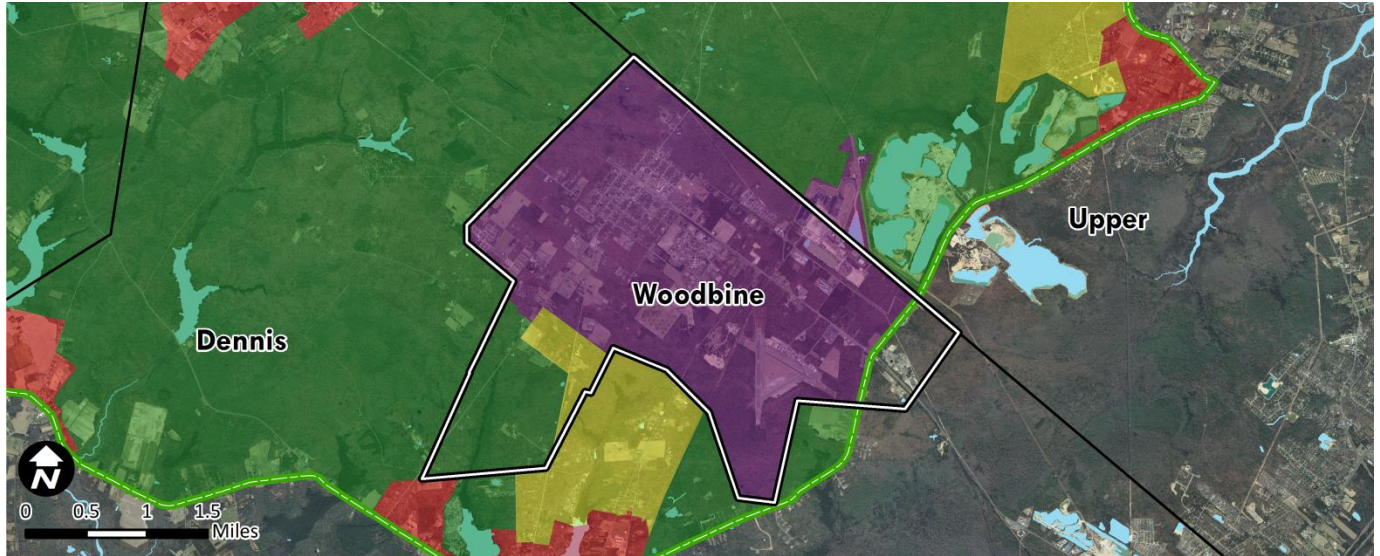
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Woodbine Borough



Pinelands Area 2010 population: 2,465 (100% of total population)

Pinelands Area acreage: 4,801 (95% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 13% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- 83% Pinelands Town
- Pinelands Village

Intermediate

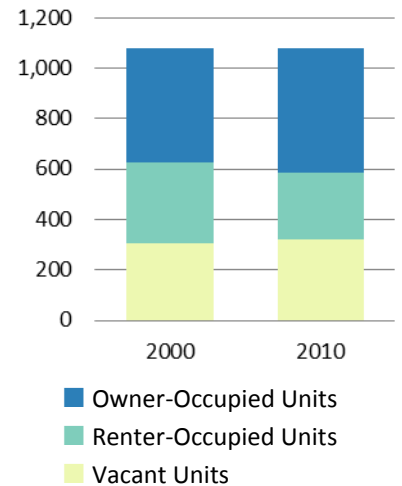
- 4% Rural Development
- Federal**
- Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,448	12,038	153
Population Density (per mile ²)	310	1,768	150
Population Change - 2010 to 2013	-1.0%	< 0.1%	168
% Land Protected in Pinelands Area	7%	36%*	40*
Assessed Acres of Farmland	319	2,270	86
Building Permits Issued	4	33	119
Housing Transactions	2	71	195
Average Home Sale Price	\$160,250	\$276,269	153
Equalized Property Value (millions)	\$157.3	\$1,517.6	177
Effective Tax Rate	1.26	2.46	181
Average Residential Property Tax Bill	\$1,687	\$5,698	200
Per Capita Income Estimate (2012)	\$20,209	\$31,778	189
Estimated Unemployment Rate	17.2%	9.2%	7

Census Housing Data Change 2000 - 2010



Private Sector Employment
529

Private Sector Establishments
78

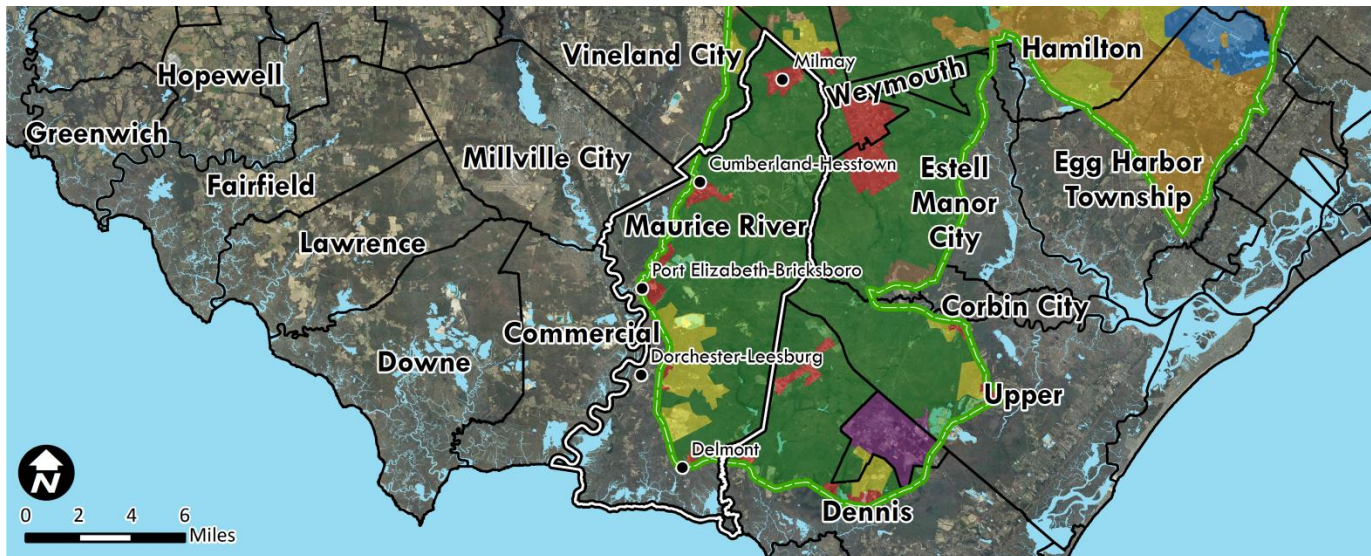
Private Sector Avg. Annual Wages
\$38,594

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Maurice River Township

Pinelands Area 2010 population: 5,897 (74% of total population)

Pinelands Area acreage: 42,009 (70% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 83% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 6% Pinelands Village

Intermediate

- 11% Rural Development

Federal

- Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

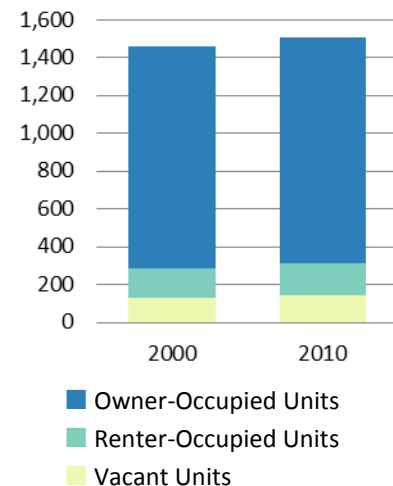


Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,662	12,038	88
Population Density (per mile ²)	81	1,768	189
Population Change - 2010 to 2013	-3.9%	< 0.1%	201
% Land Protected in Pinelands Area	50%	36%*	19*
Assessed Acres of Farmland	9,550	2,270	14
Building Permits Issued	14	33	80
Housing Transactions	8	71	158
Average Home Sale Price	\$159,438	\$276,269	154
Equalized Property Value (millions)	\$309.6	\$1,517.6	139
Effective Tax Rate	2.21	2.46	128
Average Residential Property Tax Bill	\$4,159	\$5,698	165
Per Capita Income Estimate (2012)	\$30,394	\$31,778	95
Estimated Unemployment Rate	10.1%	9.2%	69

Census Housing Data Change 2000 - 2010



Private Sector Employment 223	Private Sector Establishments 27	Private Sector Avg. Annual Wages \$28,868
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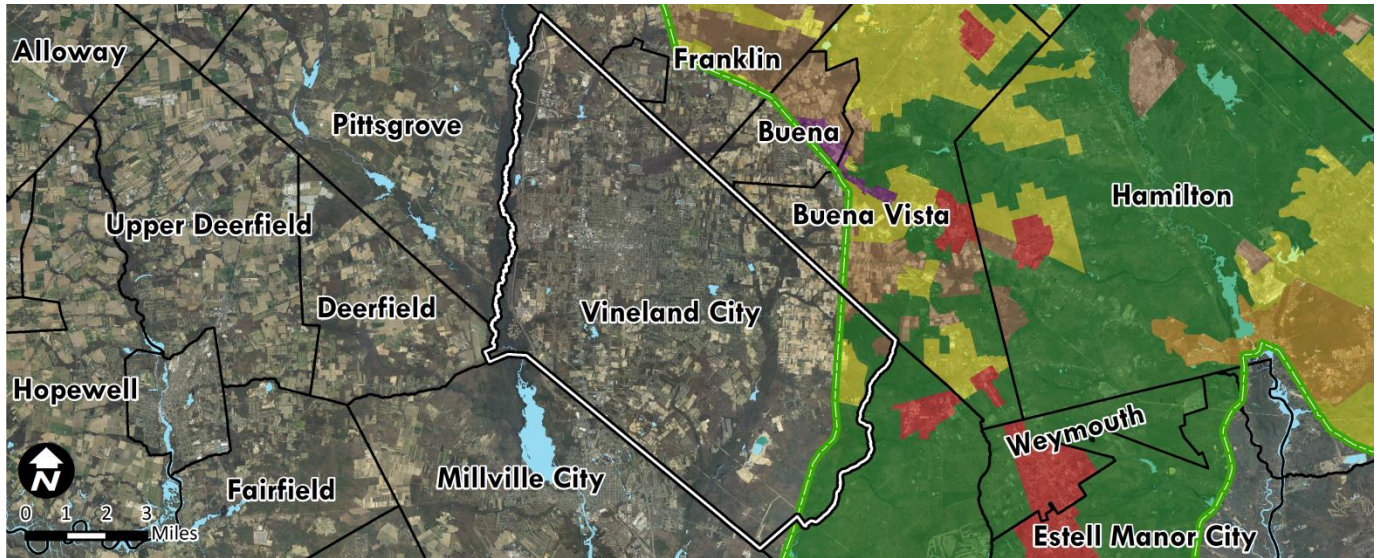
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Vineland City

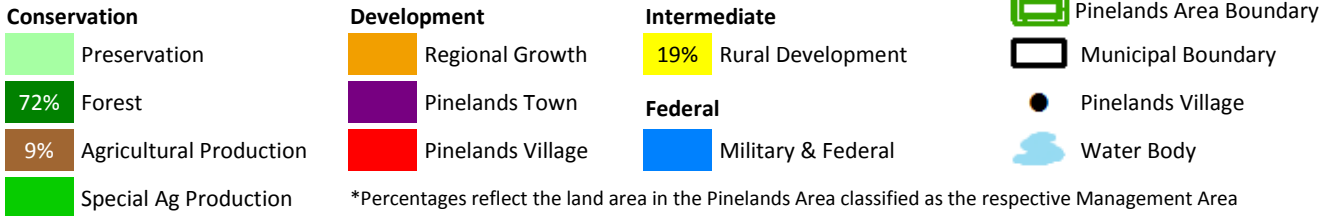


Pinelands Area 2010 population: 156 (< 1% of total population)

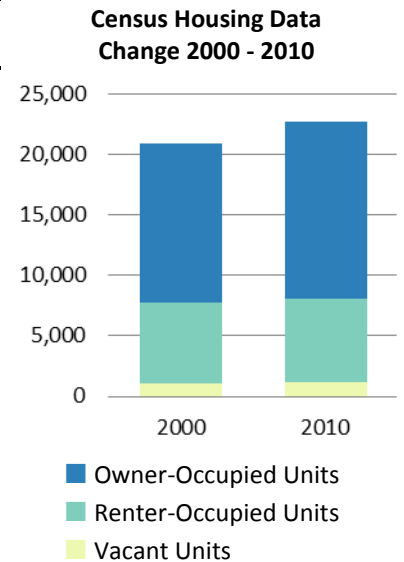
Pinelands Area acreage: 3,287 (7% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	61,050	12,038	7
Population Density (per mile ²)	883	1,768	113
Population Change - 2010 to 2013	0.5%	< 0.1%	54
% Land Protected in Pinelands Area	79%	36%*	5*
Assessed Acres of Farmland	9,296	2,270	16
Building Permits Issued	89	33	18
Housing Transactions	85	71	55
Average Home Sale Price	\$171,146	\$276,269	136
Equalized Property Value (millions)	\$4,058.9	\$1,517.6	18
Effective Tax Rate	2.17	2.46	130
Average Residential Property Tax Bill	\$3,620	\$5,698	186
Per Capita Income Estimate (2012)	\$23,278	\$31,778	170
Estimated Unemployment Rate	12.1%	9.2%	38



Private Sector Employment 24,585	Private Sector Establishments 1,571	Private Sector Avg. Annual Wages \$39,429
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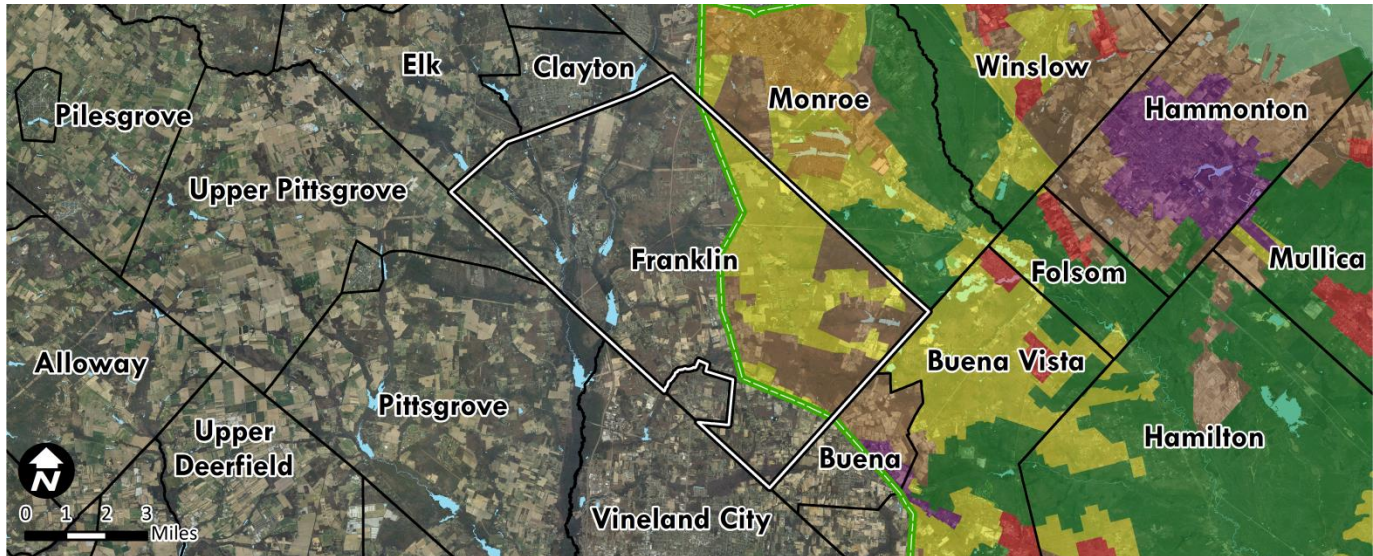
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Franklin Township



Pinelands Area 2010 population: 2,616 (16% of total population)

Pinelands Area acreage: 12,835 (36% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- 41% Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- 59% Rural Development

Federal

- Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

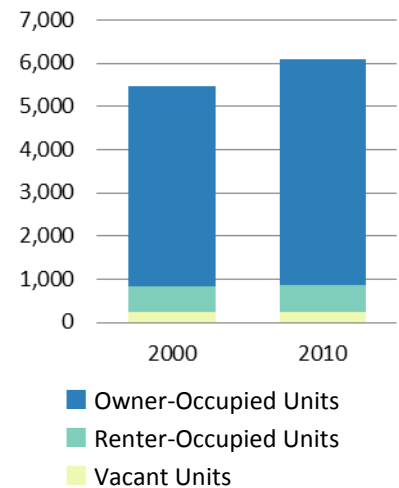


Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	16,741	12,038	44
Population Density (per mile ²)	297	1,768	152
Population Change - 2010 to 2013	-0.5%	< 0.1%	122
% Land Protected in Pinelands Area	32%	36%*	28*
Assessed Acres of Farmland	12,826	2,270	7
Building Permits Issued	25	33	55
Housing Transactions	34	71	96
Average Home Sale Price	\$195,101	\$276,269	115
Equalized Property Value (millions)	\$1,286.4	\$1,517.6	66
Effective Tax Rate	2.73	2.46	74
Average Residential Property Tax Bill	\$5,363	\$5,698	97
Per Capita Income Estimate (2012)	\$28,366	\$31,778	115
Estimated Unemployment Rate	9.5%	9.2%	79

Census Housing Data Change 2000 - 2010



Private Sector Employment	1,597	Private Sector Establishments	228	Private Sector Avg. Annual Wages	\$38,485
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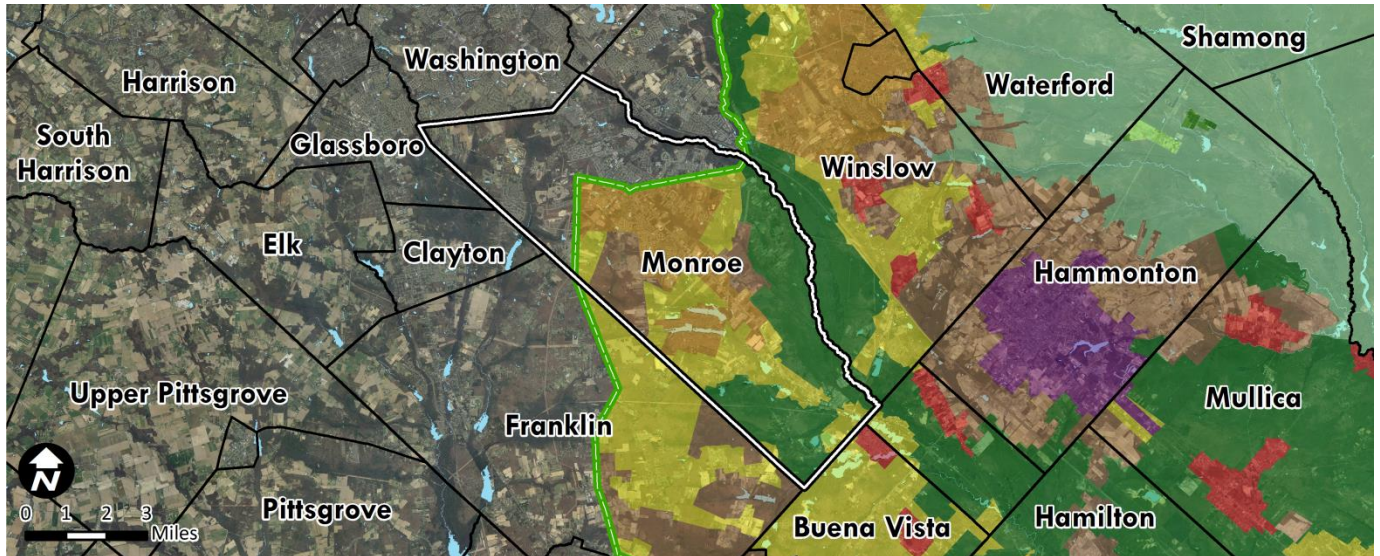
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Monroe Township

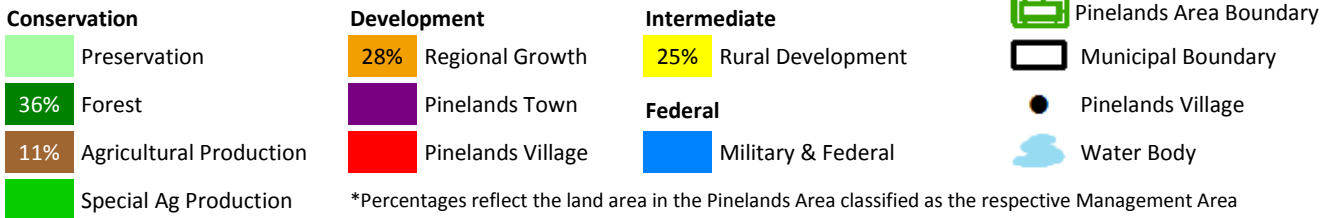


Pinelands Area 2010 population: 17,871 (49% of total population)

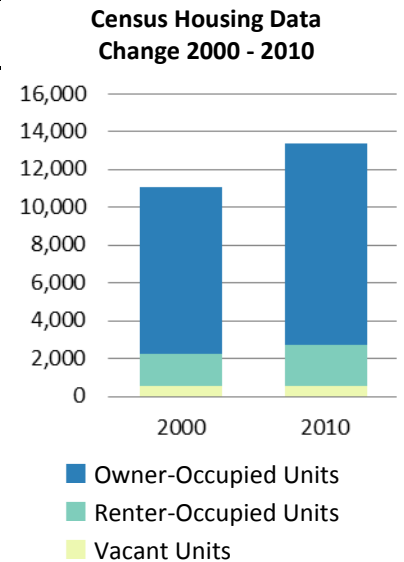
Pinelands Area acreage: 20,770 (69% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	36,732	12,038	18
Population Density (per mile ²)	784	1,768	117
Population Change - 2010 to 2013	1.7%	< 0.1%	20
% Land Protected in Pinelands Area	25%	36%*	33*
Assessed Acres of Farmland	4,845	2,270	40
Building Permits Issued	326	33	4
Housing Transactions	152	71	24
Average Home Sale Price	\$198,165	\$276,269	110
Equalized Property Value (millions)	\$2,624.9	\$1,517.6	34
Effective Tax Rate	3.36	2.46	31
Average Residential Property Tax Bill	\$6,513	\$5,698	54
Per Capita Income Estimate (2012)	\$26,411	\$31,778	147
Estimated Unemployment Rate	9.2%	9.2%	87



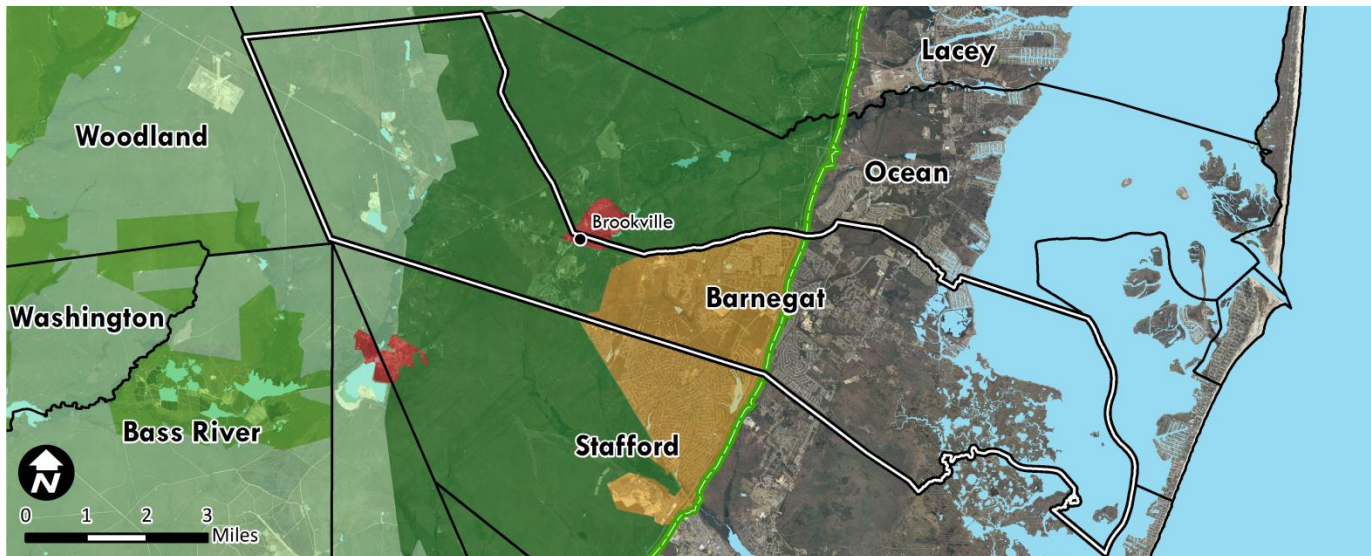
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
5,542	589	\$34,278

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Barnegat Township

Pinelands Area 2010 population: 7,225 (35% of total population)

Pinelands Area acreage: 14,357 (56% of total acreage)



Pinelands Management Areas

Conservation

- 40% Preservation
- 37% Forest
- Agricultural Production
- Special Ag Production

Development

- 23% Regional Growth
- Pinelands Town
- < 1% Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

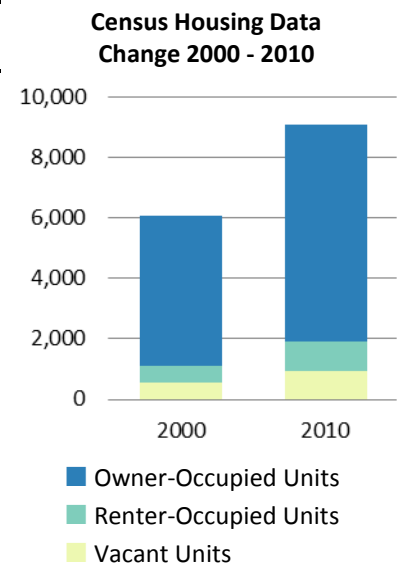
Municipal Boundary

Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	21,913	12,038	32
Population Density (per mile ²)	545	1,768	129
Population Change - 2010 to 2013	4.7%	< 0.1%	7
% Land Protected in Pinelands Area	61%	36%*	14*
Assessed Acres of Farmland	220	2,270	93
Building Permits Issued	122	33	11
Housing Transactions	145	71	27
Average Home Sale Price	\$237,402	\$276,269	78
Equalized Property Value (millions)	\$2,252.4	\$1,517.6	41
Effective Tax Rate	2.29	2.46	118
Average Residential Property Tax Bill	\$5,749	\$5,698	85
Per Capita Income Estimate (2012)	\$27,224	\$31,778	130
Estimated Unemployment Rate	8.7%	9.2%	101



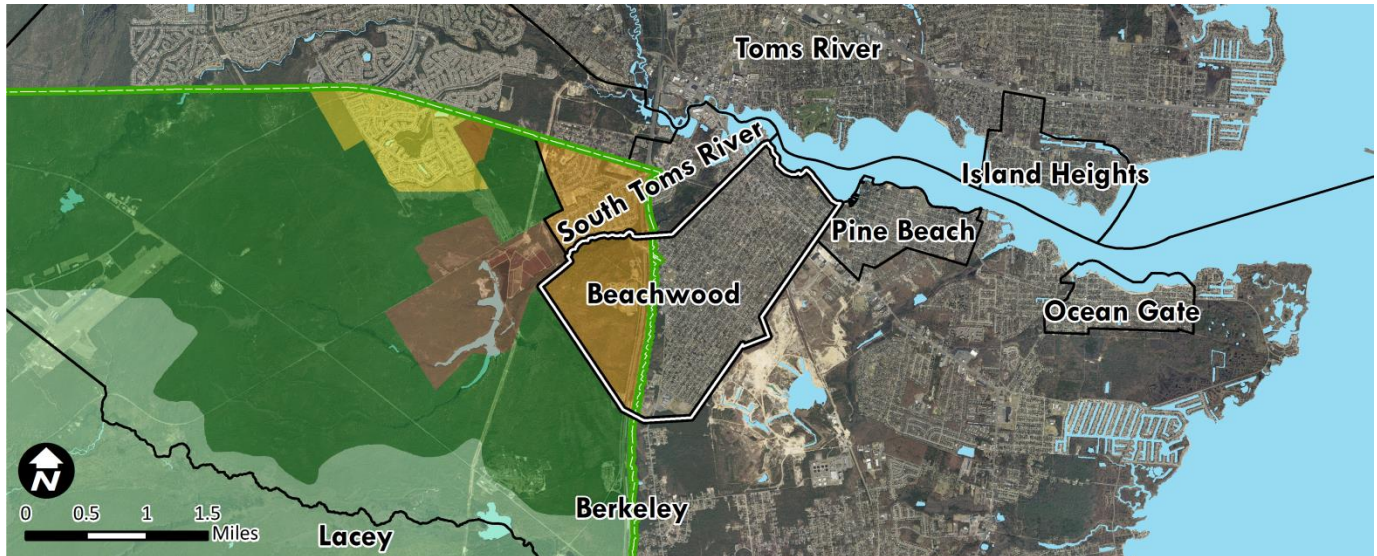
Private Sector Employment	1,816	Private Sector Establishments	278	Private Sector Avg. Annual Wages	\$36,488
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Beachwood Borough

Pinelands Area 2010 population: 2 (< 1% of total population)

Pinelands Area acreage: 500 (28% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 100% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

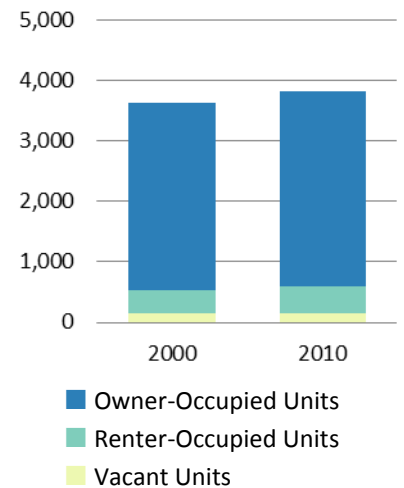
- Rural Development
- Federal**
- Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	11,172	12,038	60
Population Density (per mile ²)	4,032	1,768	25
Population Change - 2010 to 2013	1.1%	< 0.1%	31
% Land Protected in Pinelands Area	68%	36%*	11*
Assessed Acres of Farmland	0	2,270	123
Building Permits Issued	15	33	71
Housing Transactions	63	71	67
Average Home Sale Price	\$215,685	\$276,269	95
Equalized Property Value (millions)	\$879.5	\$1,517.6	88
Effective Tax Rate	1.95	2.46	152
Average Residential Property Tax Bill	\$4,555	\$5,698	145
Per Capita Income Estimate (2012)	\$28,376	\$31,778	114
Estimated Unemployment Rate	6.5%	9.2%	156

Census Housing Data Change 2000 - 2010



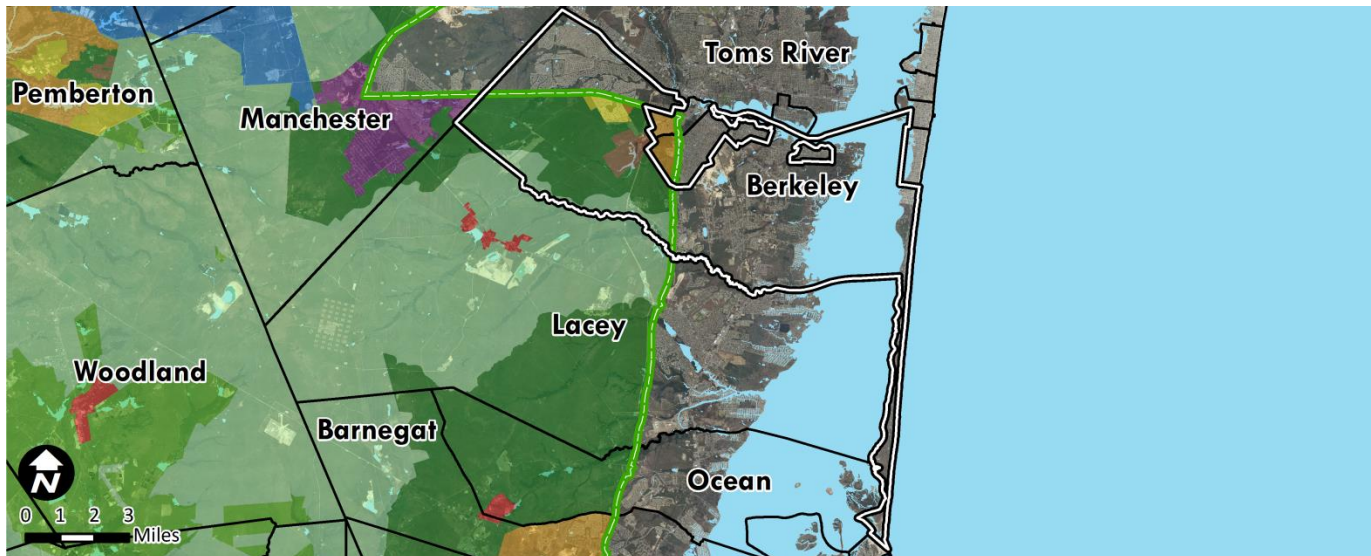
Private Sector Employment	598	Private Sector Establishments	108	Private Sector Avg. Annual Wages	\$28,769
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Berkeley Township

Pinelands Area 2010 population: 2,112 (5% of total population)

Pinelands Area acreage: 10,484 (30% of total acreage)



Pinelands Management Areas

Conservation

- 18% Preservation
- 70% Forest
- 7% Agricultural Production
- Special Ag Production

Development

- < 1% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

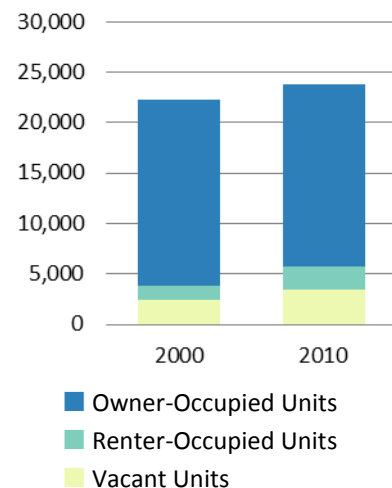
- 5% Rural Development
- Federal
- Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	41,829	12,038	13
Population Density (per mile ²)	770	1,768	118
Population Change - 2010 to 2013	1.4%	< 0.1%	24
% Land Protected in Pinelands Area	74%	36%*	8*
Assessed Acres of Farmland	88	2,270	106
Building Permits Issued	81	33	23
Housing Transactions	654	71	1
Average Home Sale Price	\$165,194	\$276,269	145
Equalized Property Value (millions)	\$5,111.5	\$1,517.6	11
Effective Tax Rate	1.85	2.46	157
Average Residential Property Tax Bill	\$3,789	\$5,698	179
Per Capita Income Estimate (2012)	\$30,507	\$31,778	94
Estimated Unemployment Rate	12.9%	9.2%	30

Census Housing Data Change 2000 - 2010



Private Sector Employment	3,162	Private Sector Establishments	368	Private Sector Avg. Annual Wages	\$33,466
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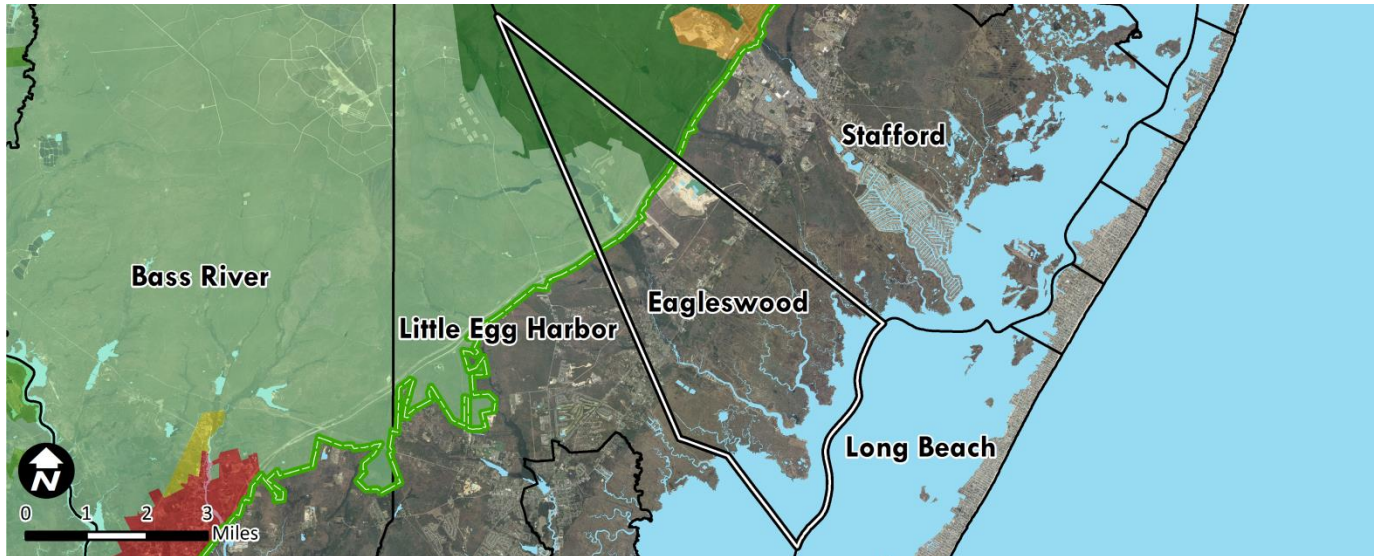
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Eagleswood Township



Pinelands Area 2010 population: 0 (0% of total population)

Pinelands Area acreage: 2,435 (20% of total acreage)



Pinelands Management Areas

Conservation

- 44% Preservation
- 56% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

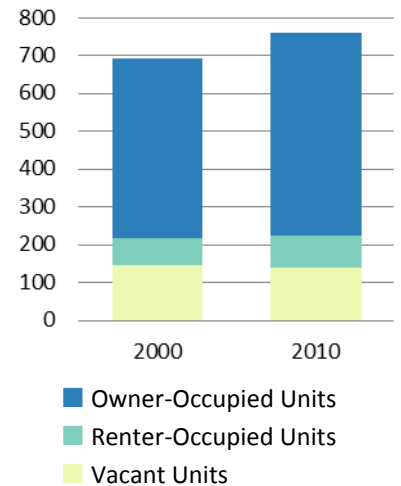
- Rural Development
- Federal
- Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,621	12,038	170
Population Density (per mile ²)	86	1,768	187
Population Change - 2010 to 2013	1.1%	< 0.1%	32
% Land Protected in Pinelands Area	88%	36%*	1*
Assessed Acres of Farmland	258	2,270	90
Building Permits Issued	12	33	85
Housing Transactions	8	71	158
Average Home Sale Price	\$278,563	\$276,269	50
Equalized Property Value (millions)	\$236.6	\$1,517.6	160
Effective Tax Rate	2.03	2.46	144
Average Residential Property Tax Bill	\$5,448	\$5,698	92
Per Capita Income Estimate (2012)	\$27,023	\$31,778	137
Estimated Unemployment Rate	7.0%	9.2%	146

Census Housing Data Change 2000 - 2010



Private Sector Employment
879

Private Sector Establishments
92

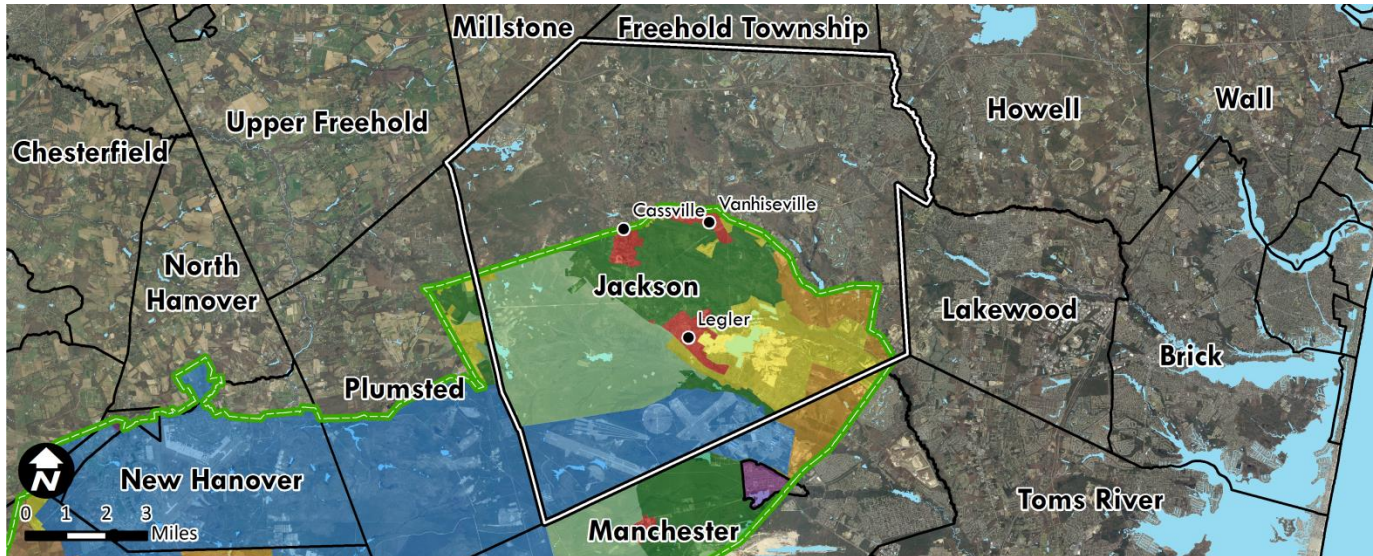
Private Sector Avg. Annual Wages
\$58,072

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Jackson Township

Pinelands Area 2010 population: 4,832 (9% of total population)

Pinelands Area acreage: 30,385 (47% of total acreage)



Pinelands Management Areas

Conservation

- 31% Preservation
- 20% Forest
- Agricultural Production
- Special Ag Production

Development

- 7% Regional Growth
- Pinelands Town
- 5% Pinelands Village

Intermediate

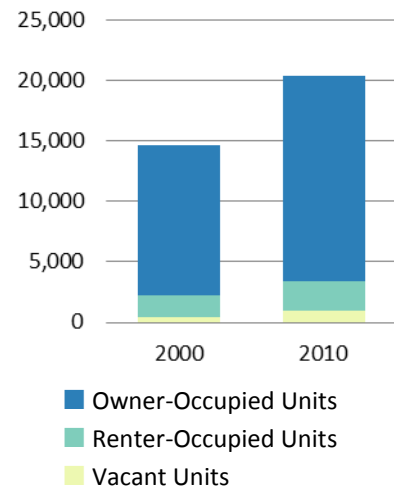
- 17% Rural Development
- Federal
- 21% Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	56,079	12,038	8
Population Density (per mile ²)	556	1,768	128
Population Change - 2010 to 2013	2.2%	< 0.1%	13
% Land Protected in Pinelands Area	49%	36%*	22*
Assessed Acres of Farmland	4,124	2,270	45
Building Permits Issued	34	33	48
Housing Transactions	400	71	6
Average Home Sale Price	\$309,098	\$276,269	40
Equalized Property Value (millions)	\$6,492.4	\$1,517.6	9
Effective Tax Rate	2.05	2.46	142
Average Residential Property Tax Bill	\$6,646	\$5,698	50
Per Capita Income Estimate (2012)	\$34,443	\$31,778	60
Estimated Unemployment Rate	7.8%	9.2%	125
Private Sector Employment	9,071		
Private Sector Establishments		884	
Private Sector Avg. Annual Wages			\$30,236

Census Housing Data Change 2000 - 2010



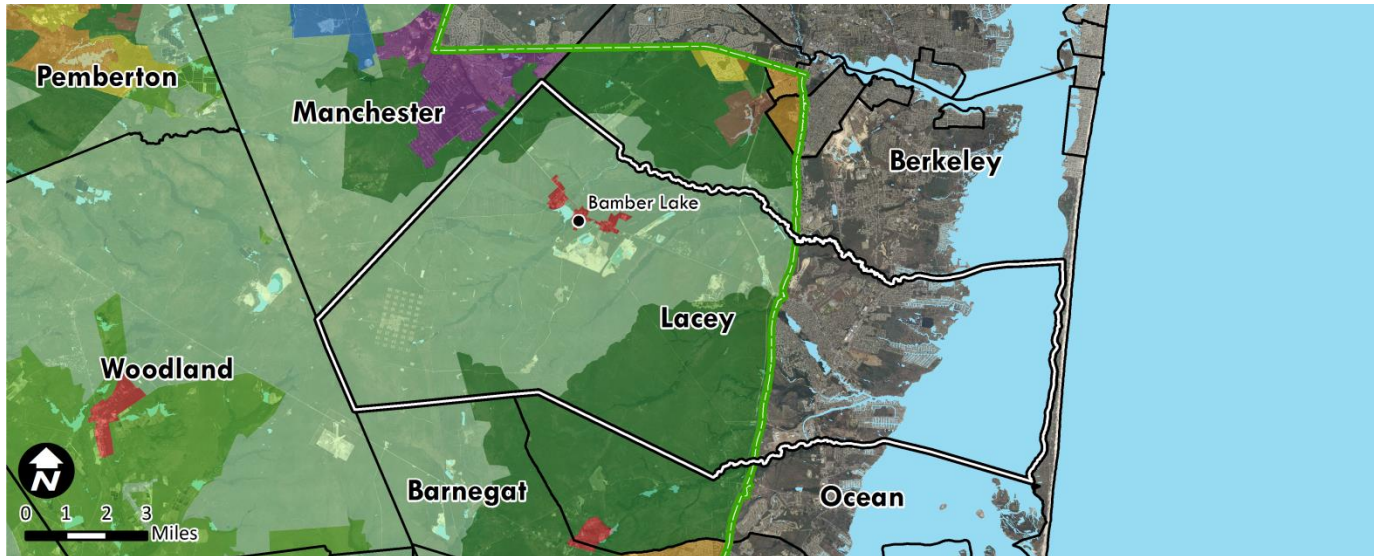
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Lacey Township

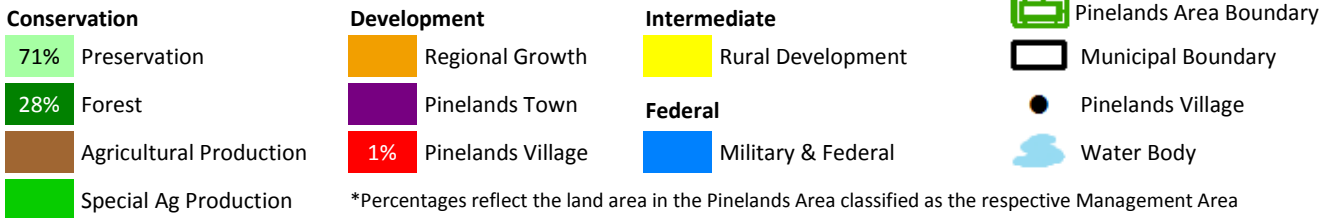


Pinelands Area 2010 population: 550 (2% of total population)

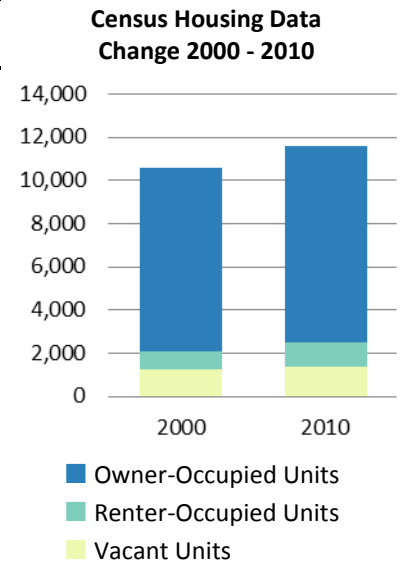
Pinelands Area acreage: 42,688 (67% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	28,021	12,038	24
Population Density (per mile ²)	281	1,768	153
Population Change - 2010 to 2013	1.4%	< 0.1%	26
% Land Protected in Pinelands Area	76%	36%*	7*
Assessed Acres of Farmland	6,320	2,270	33
Building Permits Issued	82	33	22
Housing Transactions	191	71	18
Average Home Sale Price	\$274,977	\$276,269	53
Equalized Property Value (millions)	\$3,943.7	\$1,517.6	21
Effective Tax Rate	1.78	2.46	161
Average Residential Property Tax Bill	\$5,149	\$5,698	115
Per Capita Income Estimate (2012)	\$29,330	\$31,778	106
Estimated Unemployment Rate	8.7%	9.2%	101



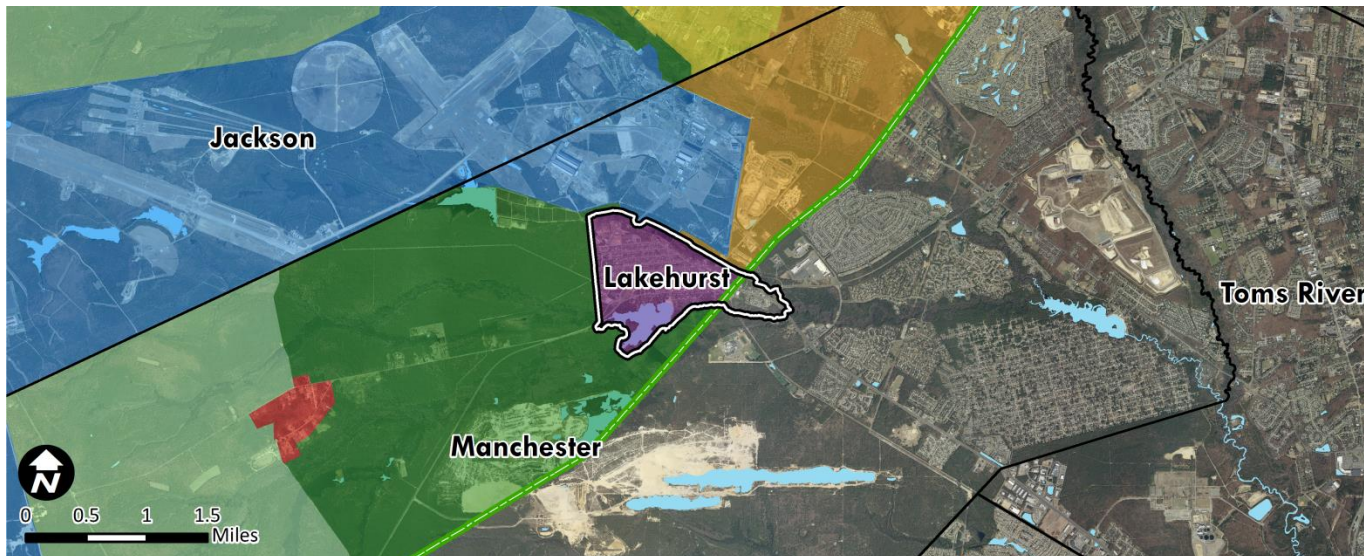
Private Sector Employment 5,177	Private Sector Establishments 551	Private Sector Avg. Annual Wages \$39,817
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Lakehurst Borough

Pinelands Area 2010 population: 2,535 (96% of total population)

Pinelands Area acreage: 551 (87% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- 100% Pinelands Town
- Pinelands Village

Intermediate

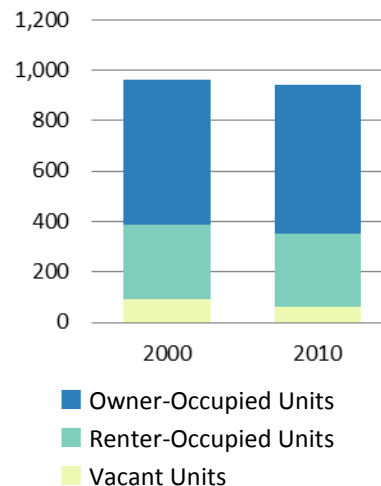
- Rural Development
- Federal**
- Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,700	12,038	149
Population Density (per mile ²)	2,731	1,768	53
Population Change - 2010 to 2013	1.7%	< 0.1%	19
% Land Protected in Pinelands Area	13%	36%*	38*
Assessed Acres of Farmland	0	2,270	123
Building Permits Issued	0	33	168
Housing Transactions	3	71	189
Average Home Sale Price	\$148,333	\$276,269	165
Equalized Property Value (millions)	\$172.6	\$1,517.6	173
Effective Tax Rate	2.01	2.46	146
Average Residential Property Tax Bill	\$4,708	\$5,698	139
Per Capita Income Estimate (2012)	\$23,225	\$31,778	171
Estimated Unemployment Rate	10.4%	9.2%	64

Census Housing Data Change 2000 - 2010



Private Sector Employment	765	Private Sector Establishments	91	Private Sector Avg. Annual Wages	\$46,436
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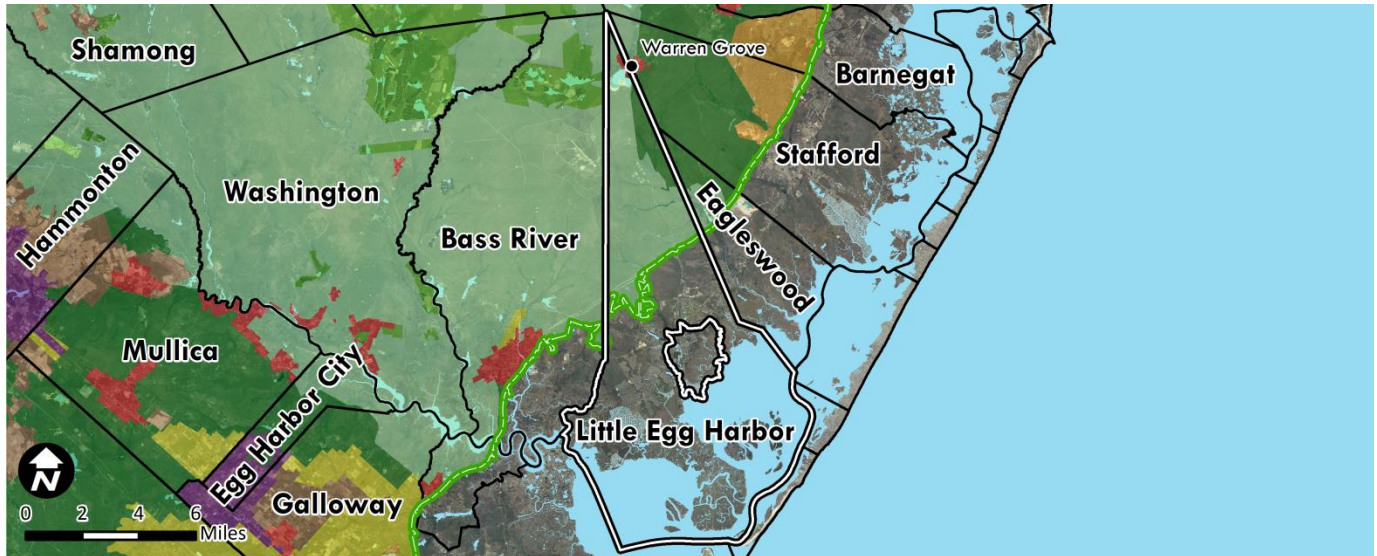
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Little Egg Harbor Township



Pinelands Area 2010 population: 203 (1% of total population)

Pinelands Area acreage: 11,582 (25% of total acreage)



Pinelands Management Areas

Conservation

- 86% Preservation
- 13% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 1% Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

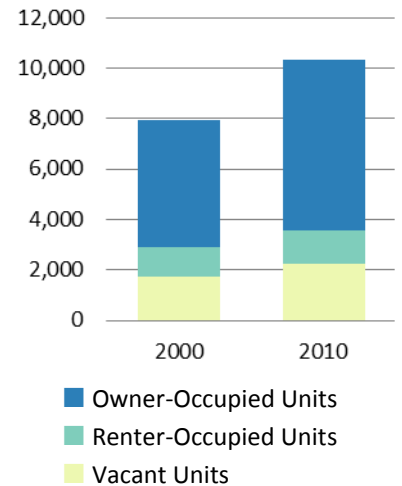
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	20,344	12,038	36
Population Density (per mile ²)	277	1,768	154
Population Change - 2010 to 2013	1.4%	< 0.1%	25
% Land Protected in Pinelands Area	87%	36%*	2*
Assessed Acres of Farmland	543	2,270	81
Building Permits Issued	103	33	13
Housing Transactions	146	71	25
Average Home Sale Price	\$192,014	\$276,269	121
Equalized Property Value (millions)	\$2,385.3	\$1,517.6	38
Effective Tax Rate	2.06	2.46	140
Average Residential Property Tax Bill	\$4,467	\$5,698	152
Per Capita Income Estimate (2012)	\$27,180	\$31,778	131
Estimated Unemployment Rate	11.7%	9.2%	44

Census Housing Data Change 2000 - 2010



Private Sector Employment
1,745

Private Sector Establishments
214

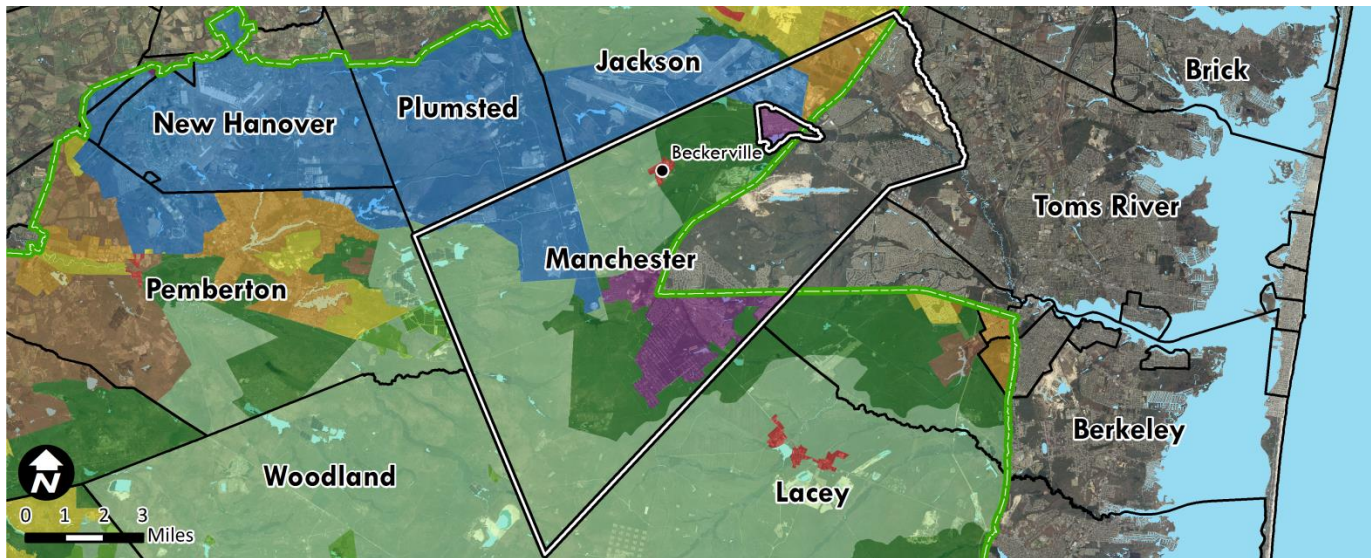
Private Sector Avg. Annual Wages
\$29,608

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Manchester Township

Pinelands Area 2010 population: 12,137 (28% of total population)

Pinelands Area acreage: 38,728 (73% of total acreage)



Pinelands Management Areas

Conservation

- 46% Preservation
- 25% Forest
- Agricultural Production
- Special Ag Production

Development

- 4% Regional Growth
- 11% Pinelands Town
- < 1% Pinelands Village

Intermediate

- < 1% Rural Development

Federal

- 13% Military & Federal

Pinelands Area Boundary

Municipal Boundary

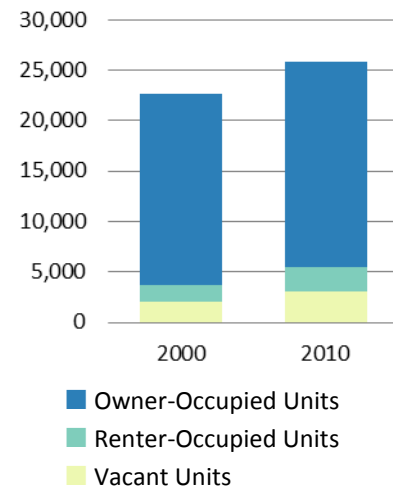
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	43,342	12,038	12
Population Density (per mile ²)	524	1,768	132
Population Change - 2010 to 2013	0.6%	< 0.1%	50
% Land Protected in Pinelands Area	52%	36%*	16*
Assessed Acres of Farmland	3,844	2,270	48
Building Permits Issued	2	33	131
Housing Transactions	200	71	15
Average Home Sale Price	\$133,027	\$276,269	179
Equalized Property Value (millions)	\$3,574.2	\$1,517.6	24
Effective Tax Rate	2.20	2.46	129
Average Residential Property Tax Bill	\$3,671	\$5,698	184
Per Capita Income Estimate (2012)	\$32,393	\$31,778	79
Estimated Unemployment Rate	12.8%	9.2%	31

Census Housing Data Change 2000 - 2010



Private Sector Employment 3,700	Private Sector Establishments 301	Private Sector Avg. Annual Wages \$32,841
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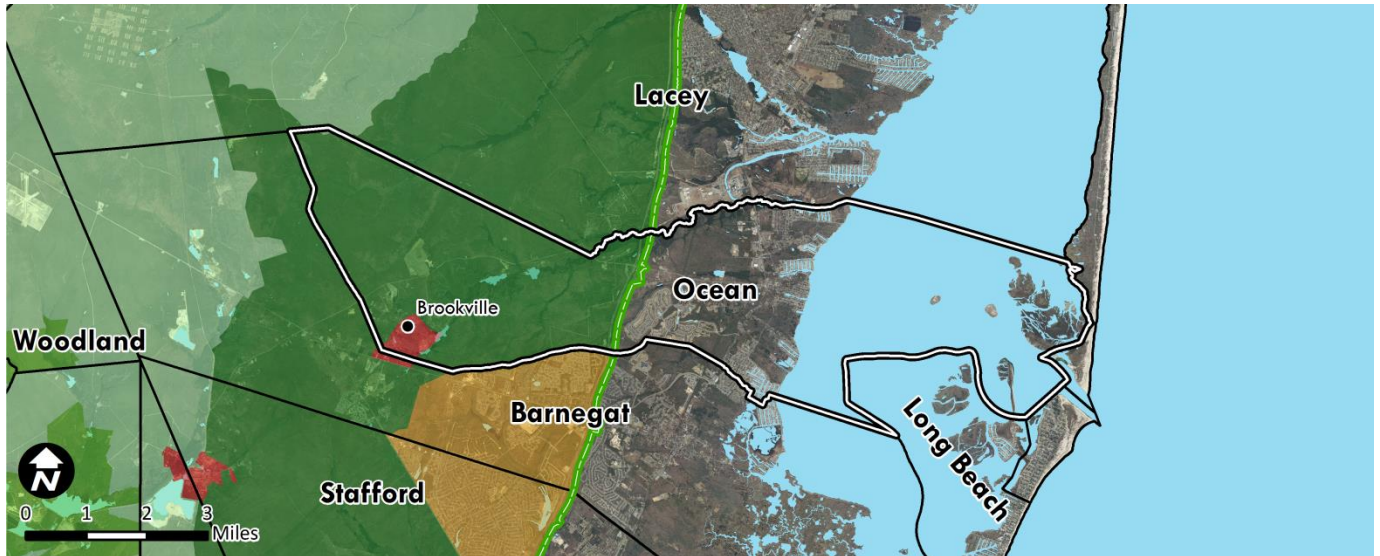
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Ocean Township

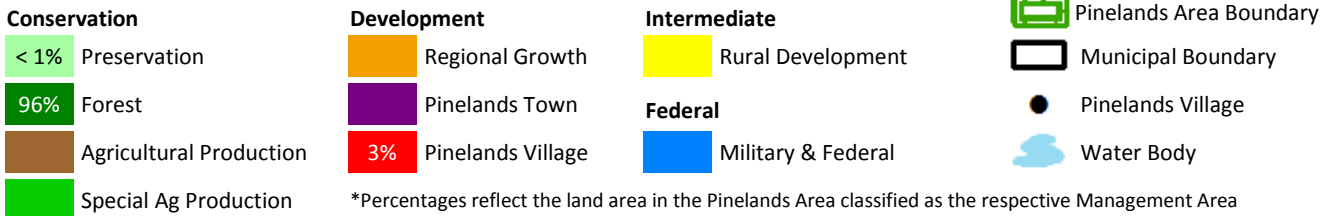


Pinelands Area 2010 population: 142 (2% of total population)

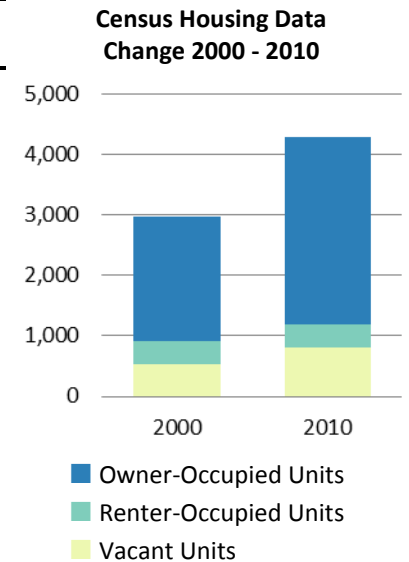
Pinelands Area acreage: 8,233 (41% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	8,653	12,038	76
Population Density (per mile ²)	273	1,768	155
Population Change - 2010 to 2013	3.9%	< 0.1%	9
% Land Protected in Pinelands Area	50%	36%*	20*
Assessed Acres of Farmland	1,915	2,270	61
Building Permits Issued	20	33	64
Housing Transactions	65	71	65
Average Home Sale Price	\$276,070	\$276,269	51
Equalized Property Value (millions)	\$1,302.8	\$1,517.6	65
Effective Tax Rate	1.66	2.46	167
Average Residential Property Tax Bill	\$4,725	\$5,698	135
Per Capita Income Estimate (2012)	\$34,442	\$31,778	61
Estimated Unemployment Rate	11.6%	9.2%	45



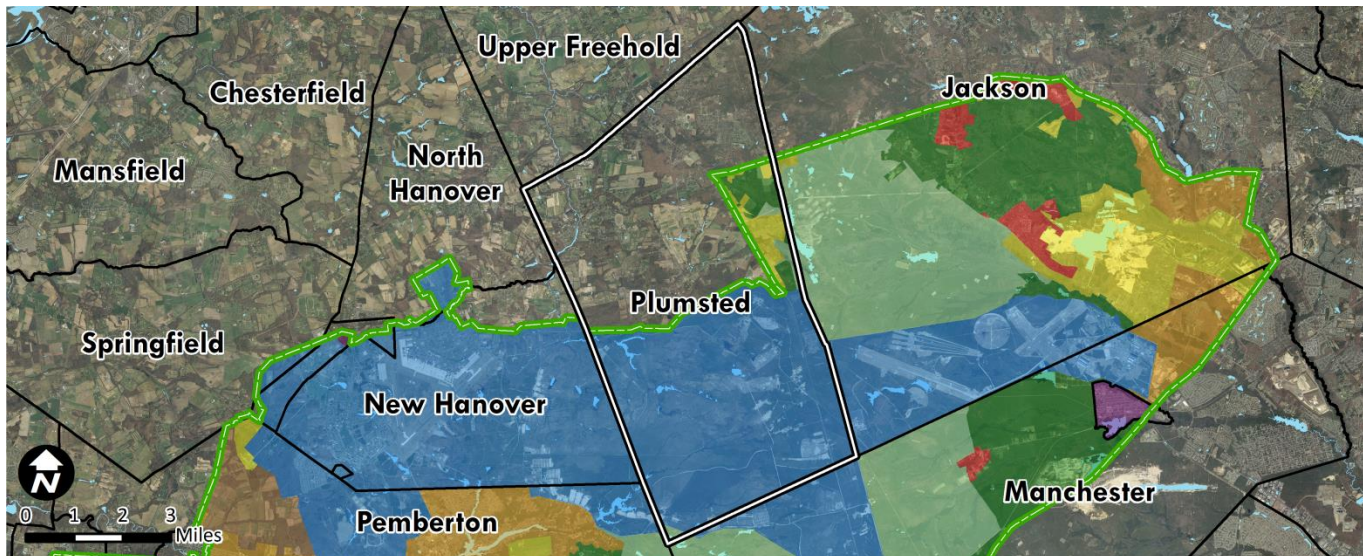
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
1,081	116	\$31,560

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Plumsted Township

Pinelands Area 2010 population: 451 (5% of total population)

Pinelands Area acreage: 13,423 (53% of total acreage)



Pinelands Management Areas

Conservation

- 2% Preservation
- 5% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

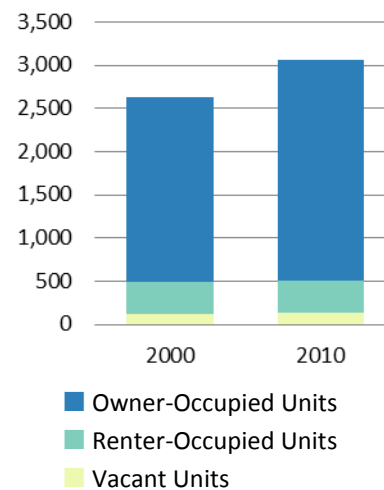
- 5% Rural Development
- Federal**
- 88% Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	8,523	12,038	79
Population Density (per mile ²)	216	1,768	166
Population Change - 2010 to 2013	1.2%	< 0.1%	30
% Land Protected in Pinelands Area	6%	36%*	42*
Assessed Acres of Farmland	5,020	2,270	39
Building Permits Issued	17	33	68
Housing Transactions	17	71	127
Average Home Sale Price	\$348,122	\$276,269	31
Equalized Property Value (millions)	\$847.2	\$1,517.6	90
Effective Tax Rate	2.02	2.46	145
Average Residential Property Tax Bill	\$5,901	\$5,698	77
Per Capita Income Estimate (2012)	\$29,842	\$31,778	102
Estimated Unemployment Rate	6.5%	9.2%	156

Census Housing Data Change 2000 - 2010



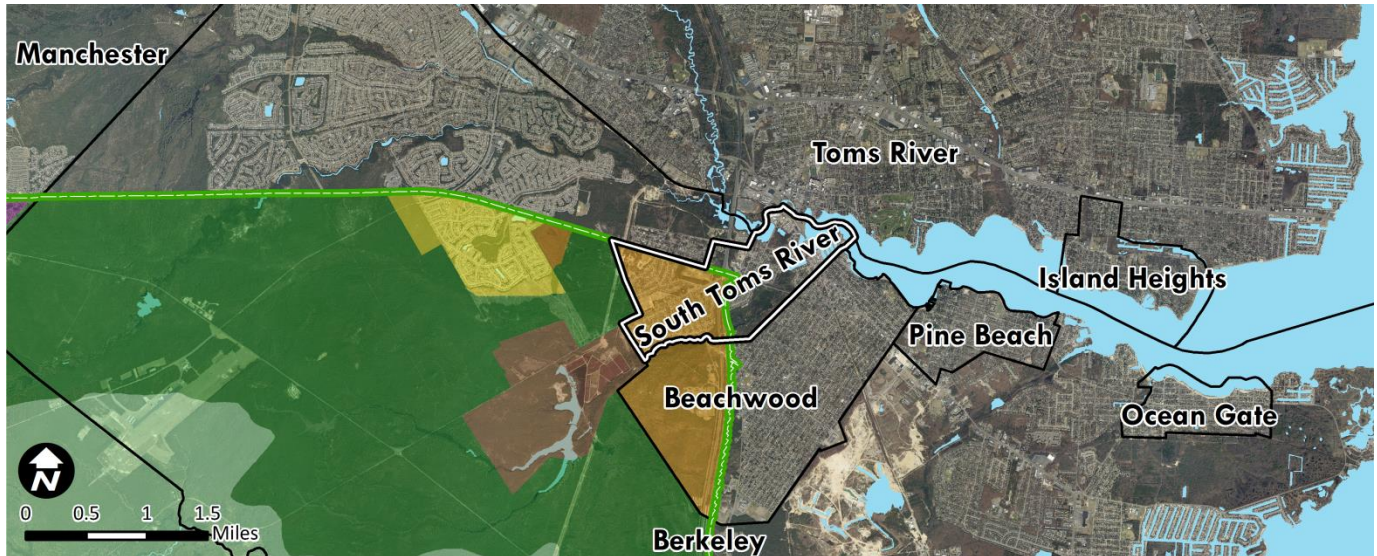
Private Sector Employment	737	Private Sector Establishments	125	Private Sector Avg. Annual Wages	\$30,853
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

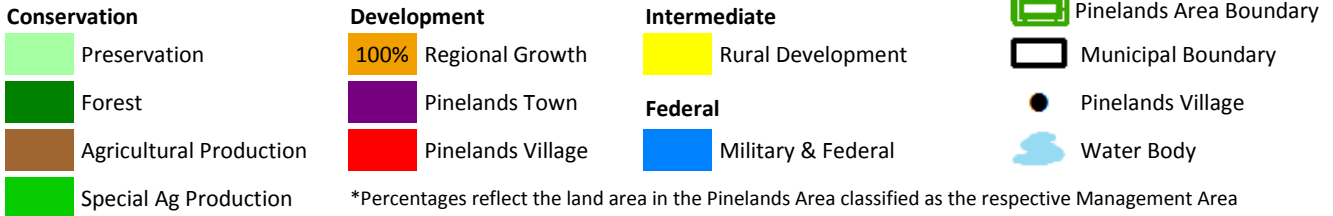
South Toms River Borough

Pinelands Area 2010 population: 2,586 (70% of total population)

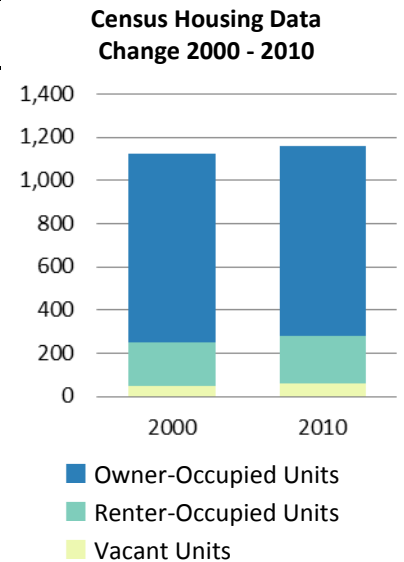
Pinelands Area acreage: 376 (47% of total acreage)



Pinelands Management Areas



2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	3,718	12,038	130
Population Density (per mile ²)	2,981	1,768	45
Population Change - 2010 to 2013	0.9%	< 0.1%	39
% Land Protected in Pinelands Area	0%	36%*	46*
Assessed Acres of Farmland	0	2,270	123
Building Permits Issued	9	33	100
Housing Transactions	9	71	153
Average Home Sale Price	\$170,489	\$276,269	137
Equalized Property Value (millions)	\$232.7	\$1,517.6	163
Effective Tax Rate	2.45	2.46	110
Average Residential Property Tax Bill	\$4,300	\$5,698	160
Per Capita Income Estimate (2012)	\$20,504	\$31,778	187
Estimated Unemployment Rate	7.6%	9.2%	130



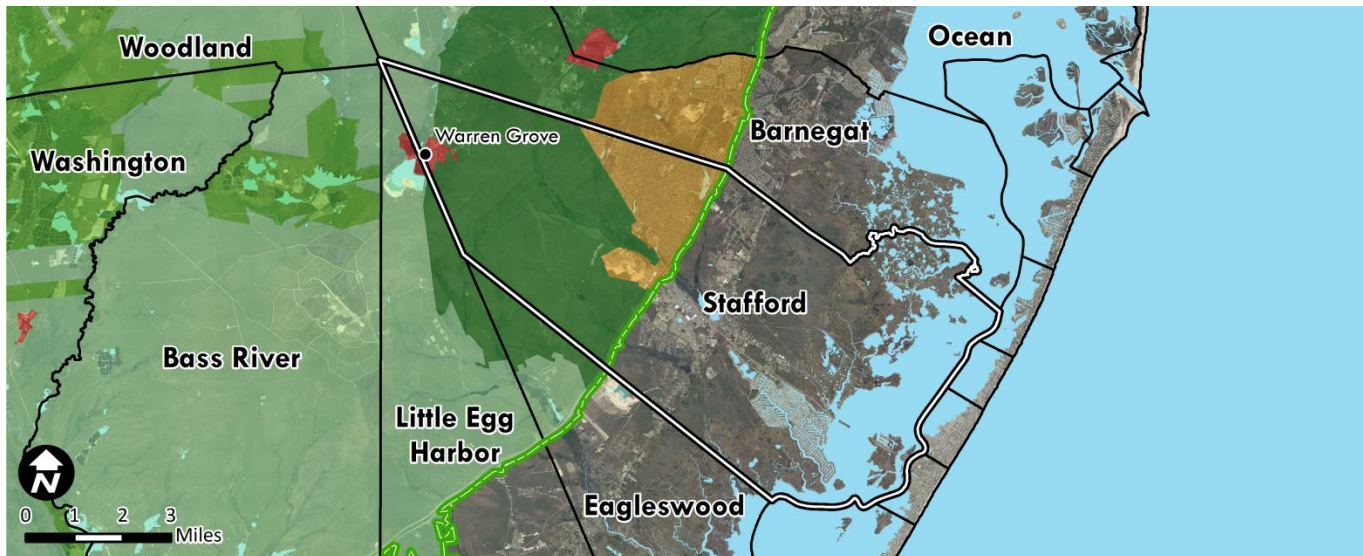
Private Sector Employment 465	Private Sector Establishments 61	Private Sector Avg. Annual Wages \$33,473
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Stafford Township

Pinelands Area 2010 population: 15,678 (59% of total population)

Pinelands Area acreage: 13,709 (39% of total acreage)



Pinelands Management Areas

Conservation

- 5% Preservation
- 71% Forest
- Agricultural Production
- Special Ag Production

Development

- 22% Regional Growth
- Pinelands Town
- 1% Pinelands Village

Intermediate

- Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

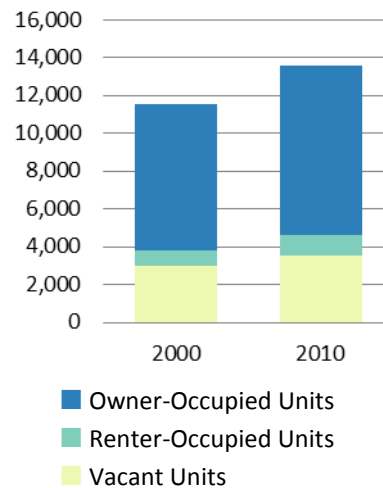
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	26,941	12,038	26
Population Density (per mile ²)	493	1,768	134
Population Change - 2010 to 2013	1.5%	< 0.1%	22
% Land Protected in Pinelands Area	70%	36%*	9*
Assessed Acres of Farmland	465	2,270	83
Building Permits Issued	238	33	6
Housing Transactions	105	71	48
Average Home Sale Price	\$220,957	\$276,269	88
Equalized Property Value (millions)	\$3,988.8	\$1,517.6	20
Effective Tax Rate	2.12	2.46	135
Average Residential Property Tax Bill	\$5,333	\$5,698	99
Per Capita Income Estimate (2012)	\$31,664	\$31,778	85
Estimated Unemployment Rate	8.1%	9.2%	120

Census Housing Data Change 2000 - 2010



Private Sector Employment	8,027	Private Sector Establishments	640	Private Sector Avg. Annual Wages	\$37,303
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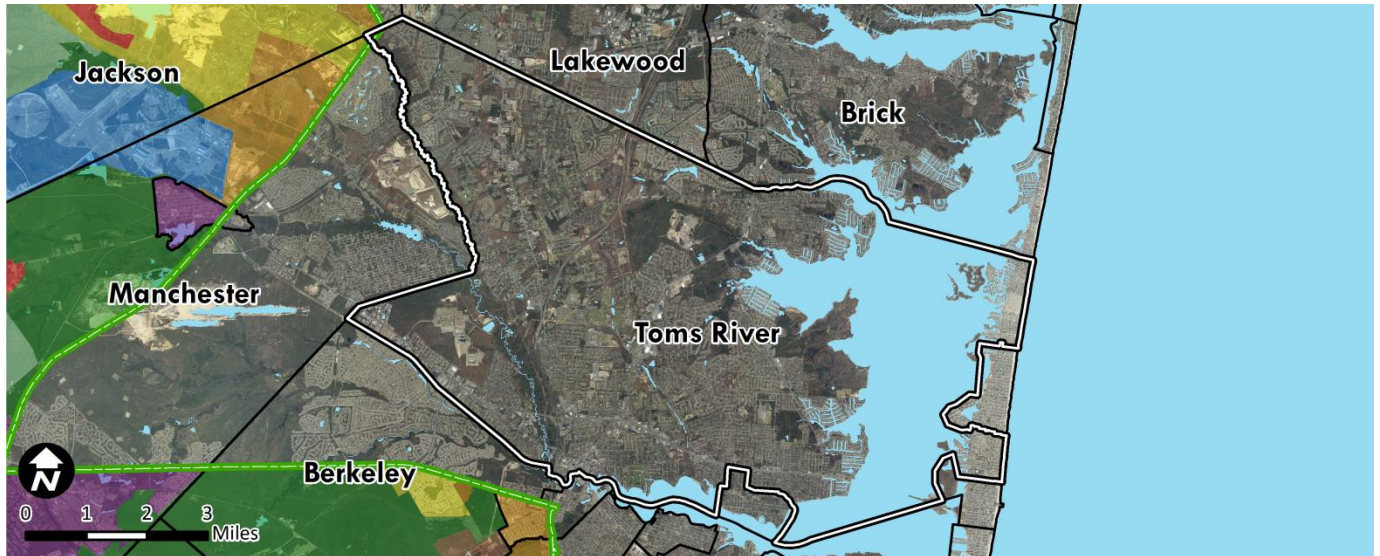
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Toms River Township



Pinelands Area 2010 population: 0 (0% of total population)

Pinelands Area acreage: 13 (< 1% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 100% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- Rural Development
- Federal**
- Military & Federal

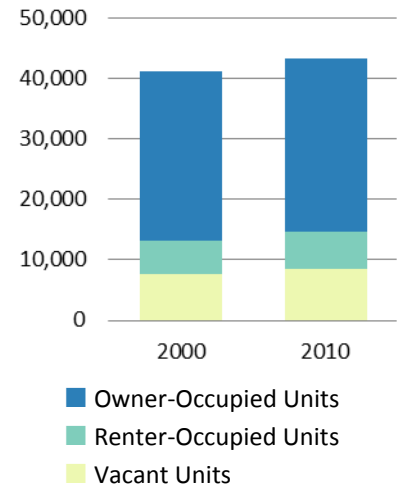
- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	91,583	12,038	2
Population Density (per mile ²)	1,718	1,768	81
Population Change - 2010 to 2013	0.4%	< 0.1%	64
% Land Protected in Pinelands Area	83%	36%*	4*
Assessed Acres of Farmland	307	2,270	87
Building Permits Issued	418	33	3
Housing Transactions	316	71	8
Average Home Sale Price	\$273,053	\$276,269	56
Equalized Property Value (millions)	\$14,151.9	\$1,517.6	2
Effective Tax Rate	1.77	2.46	162
Average Residential Property Tax Bill	\$4,629	\$5,698	142
Per Capita Income Estimate (2012)	\$35,415	\$31,778	54
Estimated Unemployment Rate	8.6%	9.2%	104

Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
31,885	2,760	\$39,477

Census Housing Data Change 2000 - 2010



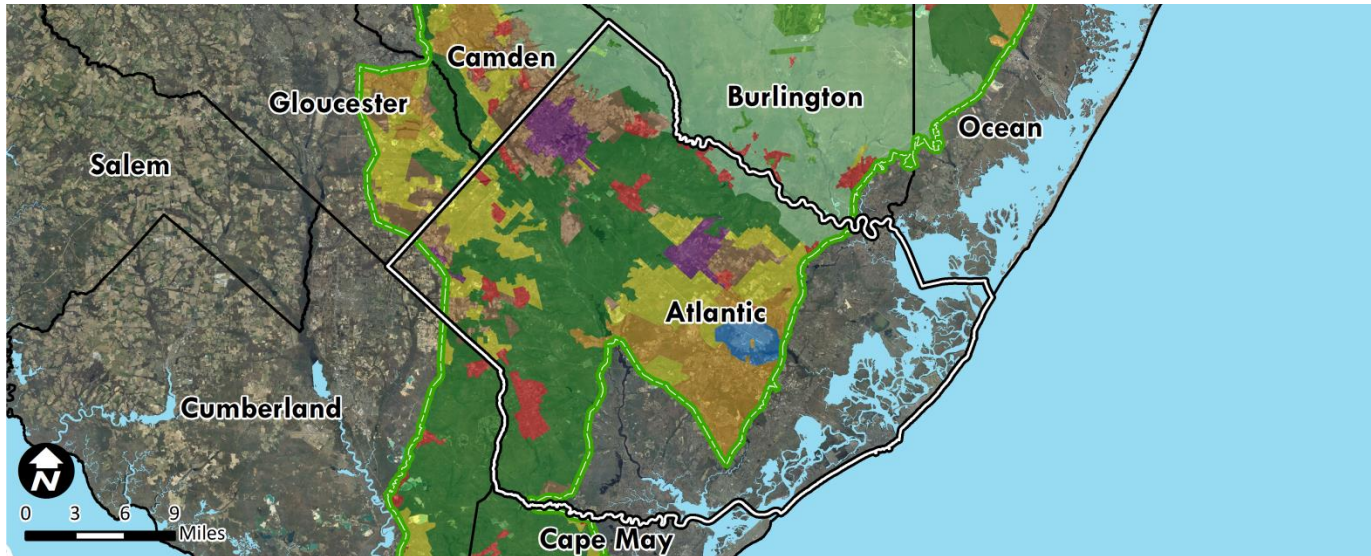
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Atlantic County



Pinelands Area 2010 population: 105,672 (38% of total population)

Pinelands Area acreage: 247,877 (63% of total acreage)



Pinelands Management Areas

Conservation

- 8% Preservation
- 41% Forest
- 10% Agricultural Production
- < 1% Special Ag Production

Development

- 11% Regional Growth
- 5% Pinelands Town
- 5% Pinelands Village

Intermediate

- 17% Rural Development

Federal

- 2% Military & Federal

Pinelands Area Boundary

Municipal Boundary

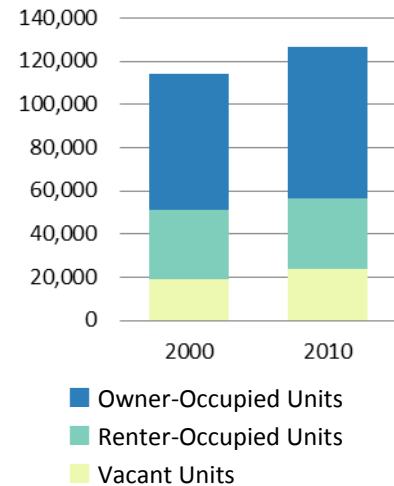
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	275,862	303,954	5
Population Density (per mile ²)	451	714	5
Population Change - 2010 to 2013	0.5%	< 1%	3
% Land Protected in Pinelands Area	29%	46%*	6*
Assessed Acres of Farmland	39,136	57,312	5
Building Permits Issued	484	826	6
Housing Transactions	1,503	1,798	5
Average Home Sale Price	\$289,639	\$264,124	3
Equalized Property Value (millions)	\$45,129.5	\$38,319.6	4
Average Effective Tax Rate	2.33	2.39	6
Average Residential Property Tax Bill	\$6,095	\$5,374	2
Per Capita Income Estimate (2012)	\$26,939	\$29,391	7
Estimated Unemployment Rate	12.0%	9.9%	2

Census Housing Data Change 2000 - 2010



Private Sector Employment 110,641	Private Sector Establishments 6,225	Private Sector Avg. Annual Wages \$36,930
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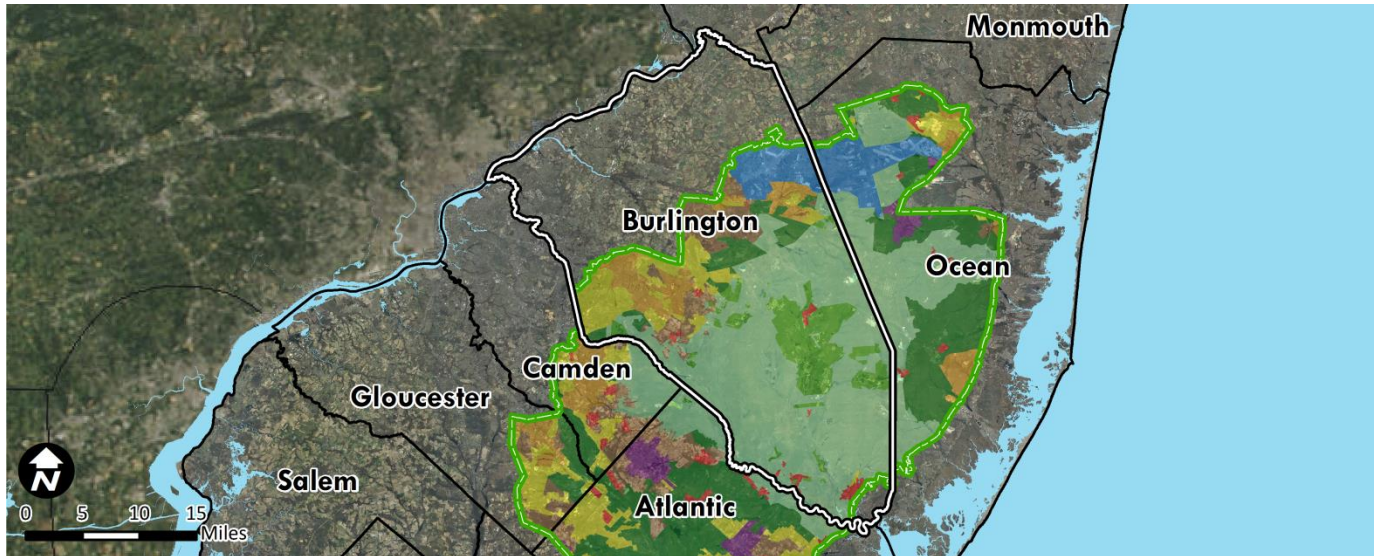
*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Burlington County



Pinelands Area 2010 population: 96,388 (21% of total population)

Pinelands Area acreage: 334,224 (64% of total acreage)



Pinelands Management Areas

Conservation

- 54% Preservation
- 4% Forest
- 8% Agricultural Production
- 11% Special Ag Production

Development

- 7% Regional Growth
- < 1% Pinelands Town
- 1% Pinelands Village

Intermediate

- 9% Rural Development
- 6% Military & Federal

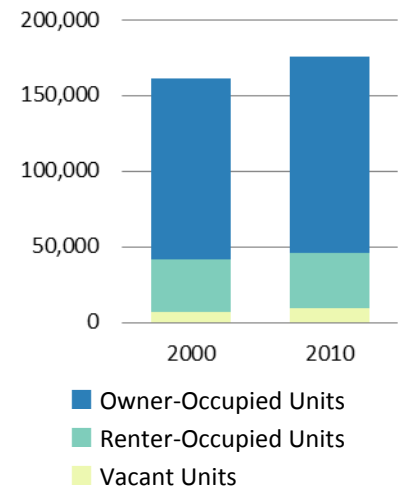
- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	450,838	303,954	3
Population Density (per mile ²)	550	714	4
Population Change - 2010 to 2013	0.5%	< 1%	4
% Land Protected in Pinelands Area	57%	46%*	2*
Assessed Acres of Farmland	117,335	57,312	1
Building Permits Issued	730	826	4
Housing Transactions	2,660	1,798	2
Average Home Sale Price	\$251,515	\$264,124	4
Equalized Property Value (millions)	\$45,579.7	\$38,319.6	3
Average Effective Tax Rate	2.45	2.39	5
Average Residential Property Tax Bill	\$6,254	\$5,374	1
Per Capita Income Estimate (2012)	\$34,714	\$29,391	1
Estimated Unemployment Rate	7.9%	9.9%	8

Private Sector Employment	167,422	Private Sector Establishments	10,297	Private Sector Avg. Annual Wages	\$42,556
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Census Housing Data Change 2000 - 2010

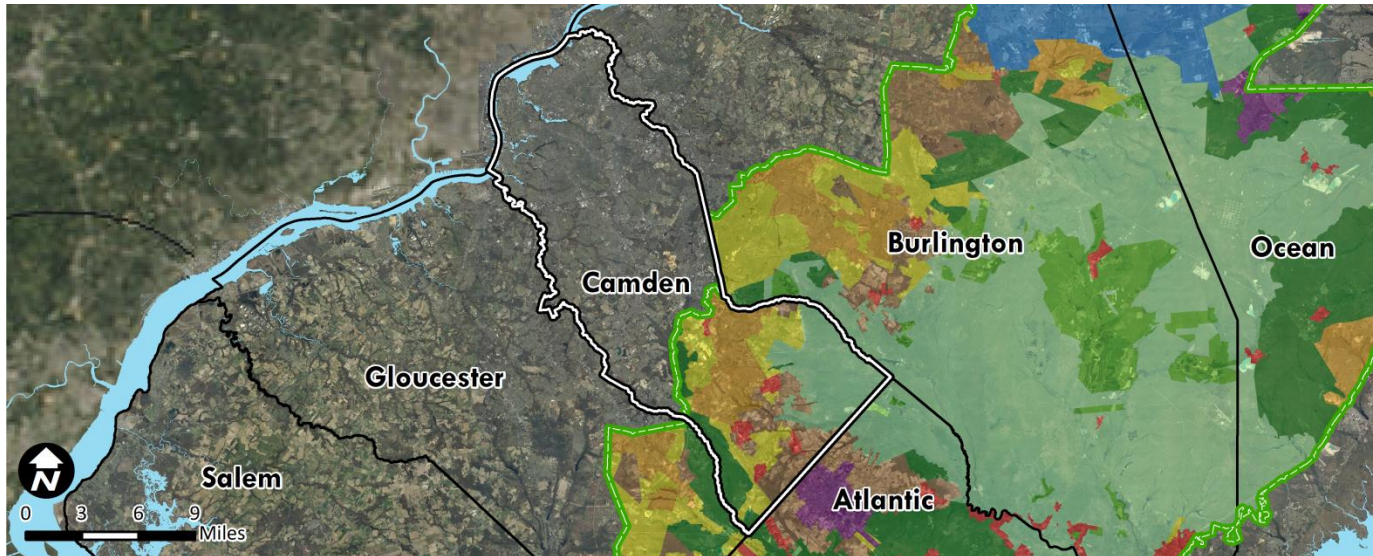


*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Camden County

Pinelands Area 2010 population: 30,475 (6% of total population)

Pinelands Area acreage: 54,907 (38% of total acreage)



Pinelands Management Areas

Conservation

- 27% Preservation
- 12% Forest
- 17% Agricultural Production
- Special Ag Production

Development

- 19% Regional Growth
- Pinelands Town
- 4% Pinelands Village

Intermediate

- 21% Rural Development
- Federal**
- Military & Federal

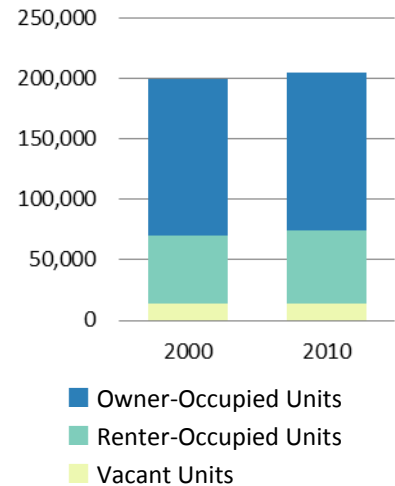
- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	512,854	303,954	2
Population Density (per mile ²)	2,254	714	1
Population Change - 2010 to 2013	-0.2%	< 1%	6
% Land Protected in Pinelands Area	44%	46%*	5*
Assessed Acres of Farmland	10,833	57,312	7
Building Permits Issued	1,368	826	2
Housing Transactions	2,020	1,798	4
Average Home Sale Price	\$204,731	\$264,124	6
Equalized Property Value (millions)	\$37,127.2	\$38,319.6	5
Average Effective Tax Rate	3.41	2.39	1
Average Residential Property Tax Bill	\$5,957	\$5,374	4
Per Capita Income Estimate (2012)	\$28,469	\$29,391	5
Estimated Unemployment Rate	9.1%	9.9%	4

Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
159,628	11,239	\$38,820

Census Housing Data Change 2000 - 2010

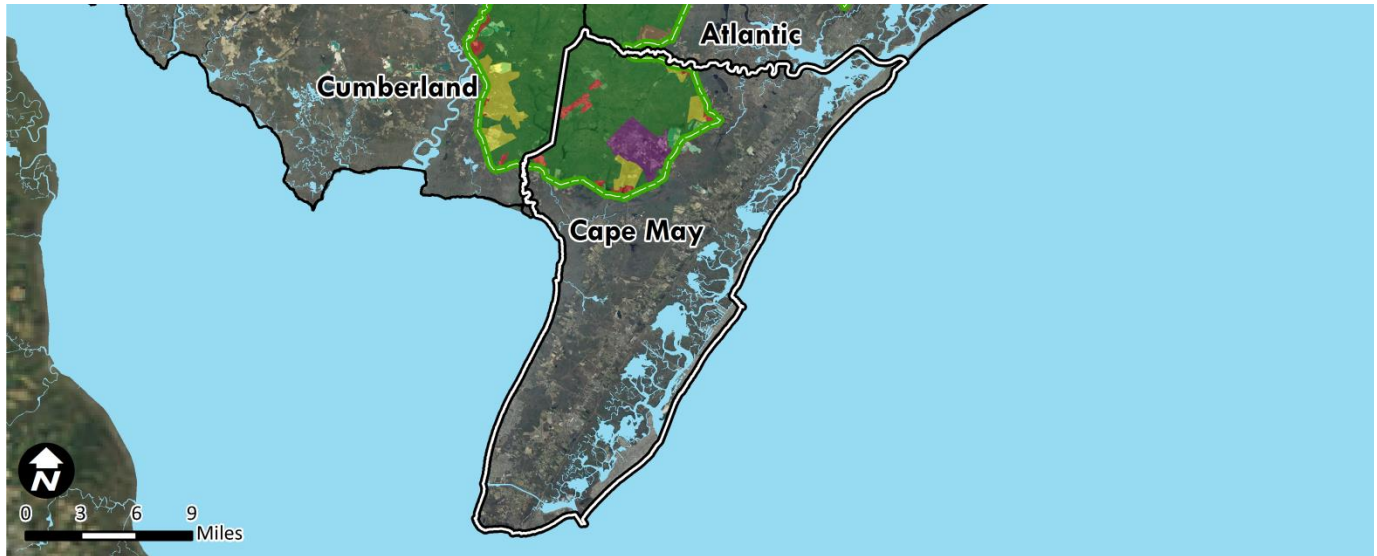


*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Cape May County

Pinelands Area 2010 population: 5,341 (5% of total population)

Pinelands Area acreage: 34,807 (19% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 75% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- 12% Pinelands Town
- 6% Pinelands Village

Intermediate

- 6% Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

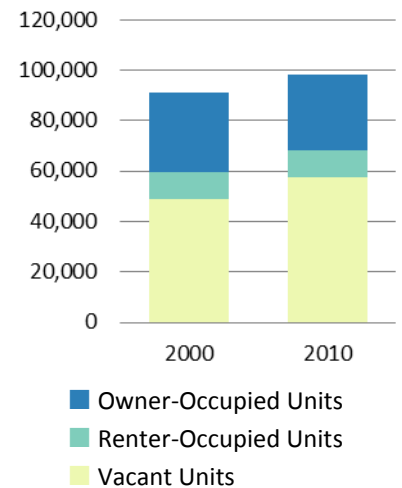
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	95,897	303,954	7
Population Density (per mile ²)	336	714	6
Population Change - 2010 to 2013	-1.4%	< 1%	8
% Land Protected in Pinelands Area	53%	46%*	3*
Assessed Acres of Farmland	9,877	57,312	8
Building Permits Issued	658	826	5
Housing Transactions	2,135	1,798	3
Average Home Sale Price	\$518,619	\$264,124	1
Equalized Property Value (millions)	\$46,873.2	\$38,319.6	2
Average Effective Tax Rate	1.12	2.39	8
Average Residential Property Tax Bill	\$4,557	\$5,374	7
Per Capita Income Estimate (2012)	\$31,360	\$29,391	3
Estimated Unemployment Rate	12.0%	9.9%	2

Census Housing Data Change 2000 - 2010



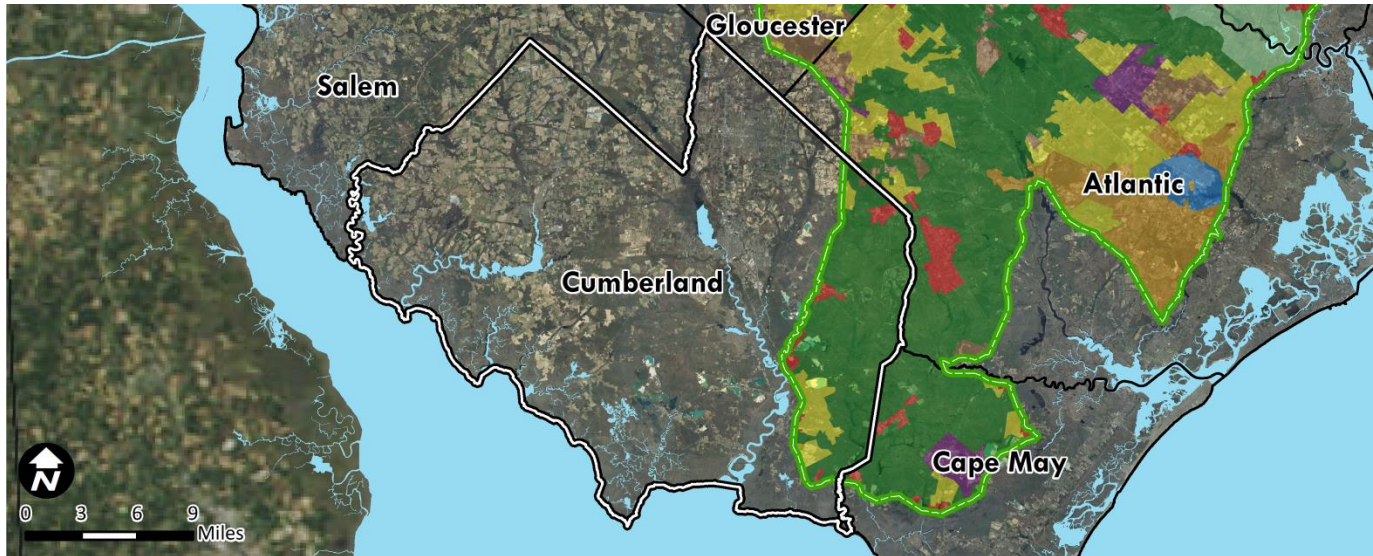
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
31,347	3,722	\$29,052

*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Cumberland County

Pinelands Area 2010 population: 6,053 (4% of total population)

Pinelands Area acreage: 45,398 (14% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 82% Forest
- 1% Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 6% Pinelands Village

Intermediate

- 11% Rural Development

Federal

- Military & Federal

Pinelands Area Boundary

Municipal Boundary

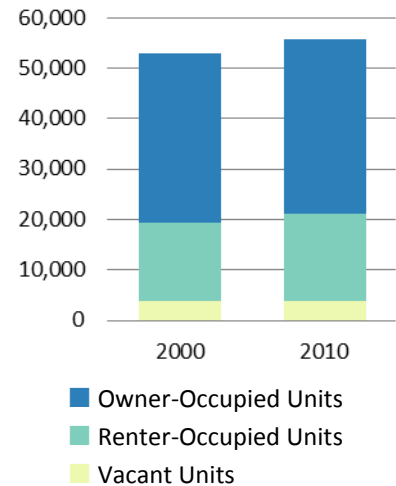
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	157,332	303,954	6
Population Density (per mile ²)	313	714	7
Population Change - 2010 to 2013	0.3%	< 1%	5
% Land Protected in Pinelands Area	52%	46%*	4*
Assessed Acres of Farmland	88,184	57,312	3
Building Permits Issued	219	826	7
Housing Transactions	359	1,798	7
Average Home Sale Price	\$146,708	\$264,124	8
Equalized Property Value (millions)	\$8,908.7	\$38,319.6	7
Average Effective Tax Rate	2.53	2.39	4
Average Residential Property Tax Bill	\$3,706	\$5,374	8
Per Capita Income Estimate (2012)	\$22,531	\$29,391	8
Estimated Unemployment Rate	12.2%	9.9%	1

Census Housing Data Change 2000 - 2010



Private Sector Employment 44,722	Private Sector Establishments 2,883	Private Sector Avg. Annual Wages \$34,235
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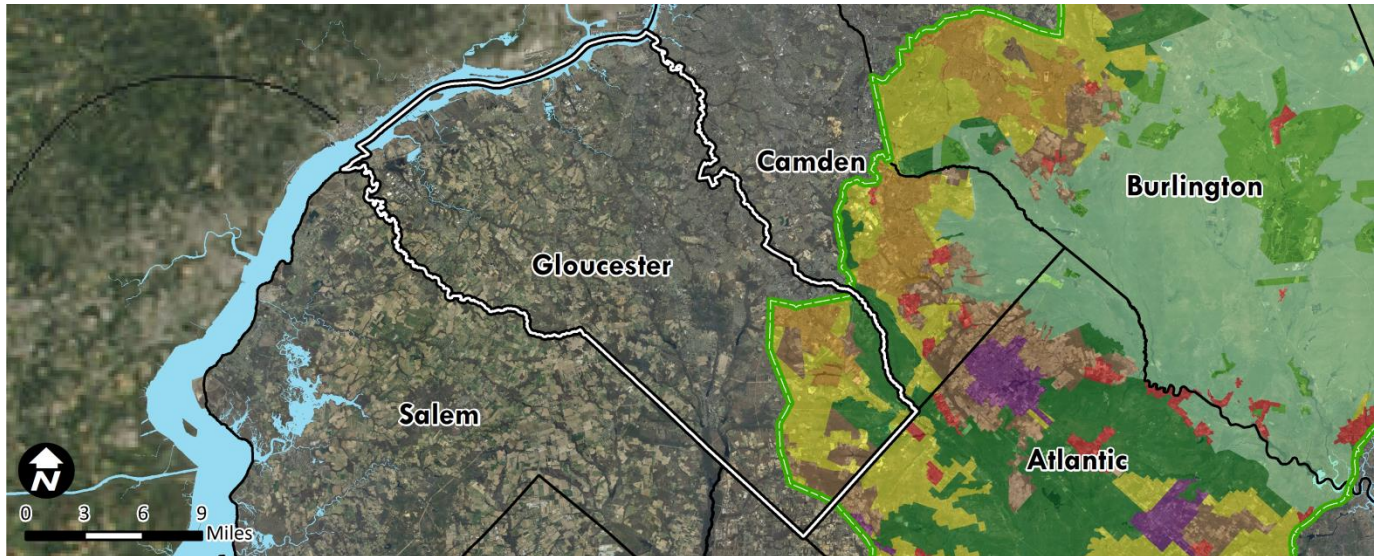
*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Gloucester County



Pinelands Area 2010 population: 20,487 (7% of total population)

Pinelands Area acreage: 33,581 (16% of total acreage)



Pinelands Management Areas

Conservation

- Preservation
- 22% Forest
- 22% Agricultural Production
- Special Ag Production

Development

- 17% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- 38% Rural Development
- Federal**
Military & Federal

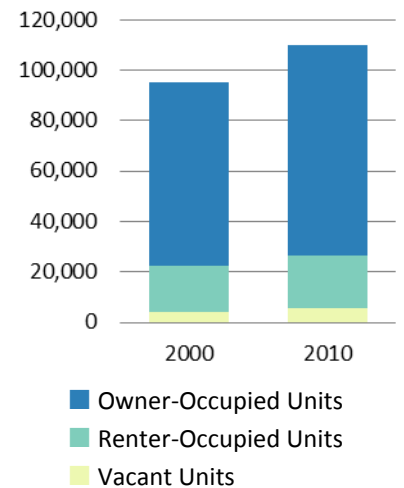
- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	290,265	303,954	4
Population Density (per mile ²)	862	714	2
Population Change - 2010 to 2013	0.7%	< 1%	2
% Land Protected in Pinelands Area	27%	46%*	7*
Assessed Acres of Farmland	56,859	57,312	4
Building Permits Issued	939	826	3
Housing Transactions	1,347	1,798	6
Average Home Sale Price	\$211,201	\$264,124	5
Equalized Property Value (millions)	\$25,897.2	\$38,319.6	6
Average Effective Tax Rate	3.03	2.39	2
Average Residential Property Tax Bill	\$6,080	\$5,374	3
Per Capita Income Estimate (2012)	\$32,404	\$29,391	2
Estimated Unemployment Rate	8.5%	9.9%	6

Private Sector Employment	79,983	Private Sector Establishments	5,802	Private Sector Avg. Annual Wages	\$39,796
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Census Housing Data Change 2000 - 2010



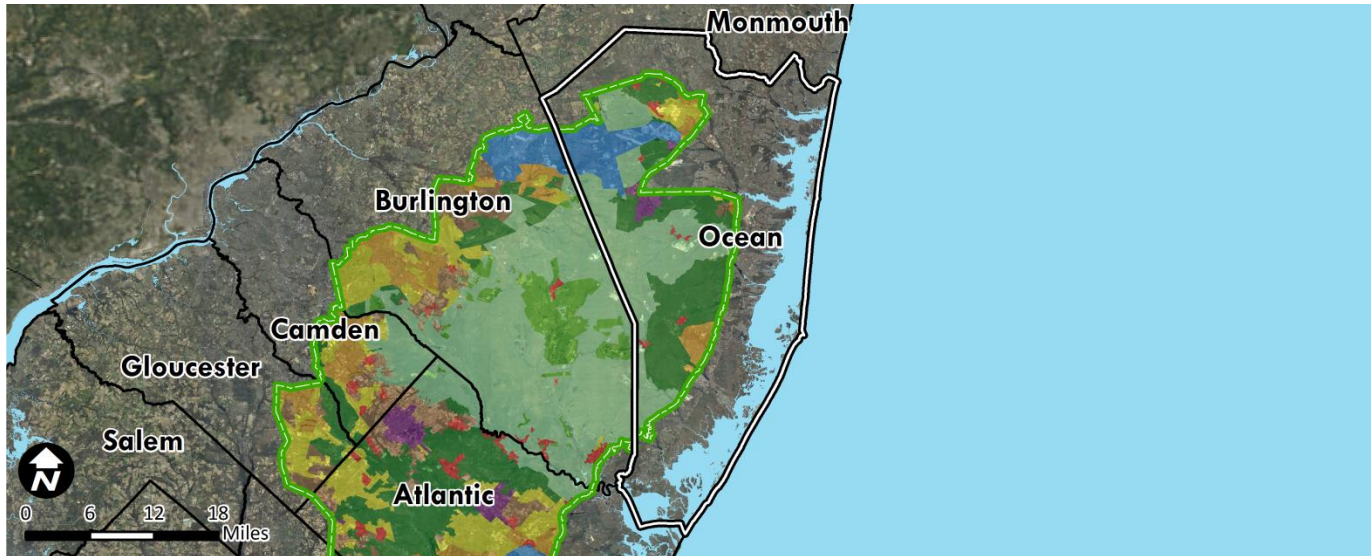
*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Ocean County



Pinelands Area 2010 population: 48,453 (8% of total population)

Pinelands Area acreage: 187,559 (39% of total acreage)



Pinelands Management Areas

Conservation

- 41% Preservation
- 33% Forest
- < 1% Agricultural Production
- Special Ag Production

Development

- 6% Regional Growth
- 3% Pinelands Town
- 1% Pinelands Village

Intermediate

- 3% Rural Development

Federal

- 12% Military & Federal

Pinelands Area Boundary

Municipal Boundary

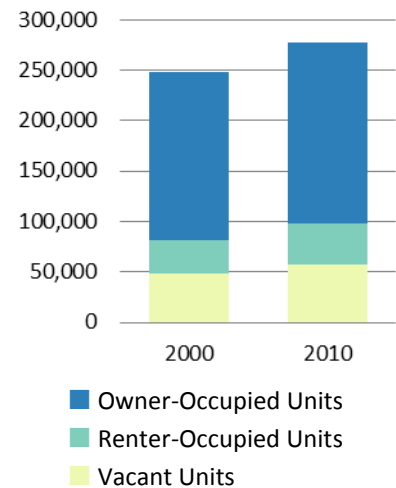
Pinelands Village

Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	583,414	303,954	1
Population Density (per mile ²)	769	714	3
Population Change - 2010 to 2013	1.2%	< 1%	1
% Land Protected in Pinelands Area	59%	46%*	1*
Assessed Acres of Farmland	23,361	57,312	6
Building Permits Issued	2,171	826	1
Housing Transactions	4,142	1,798	1
Average Home Sale Price	\$298,588	\$264,124	2
Equalized Property Value (millions)	\$91,788.1	\$38,319.6	1
Average Effective Tax Rate	1.62	2.39	7
Average Residential Property Tax Bill	\$5,470	\$5,374	5
Per Capita Income Estimate (2012)	\$30,573	\$29,391	4
Estimated Unemployment Rate	8.5%	9.9%	6
Private Sector Employment	126,844	Private Sector Establishments	11,851
		Private Sector Avg. Annual Wages	\$33,777

Census Housing Data Change 2000 - 2010

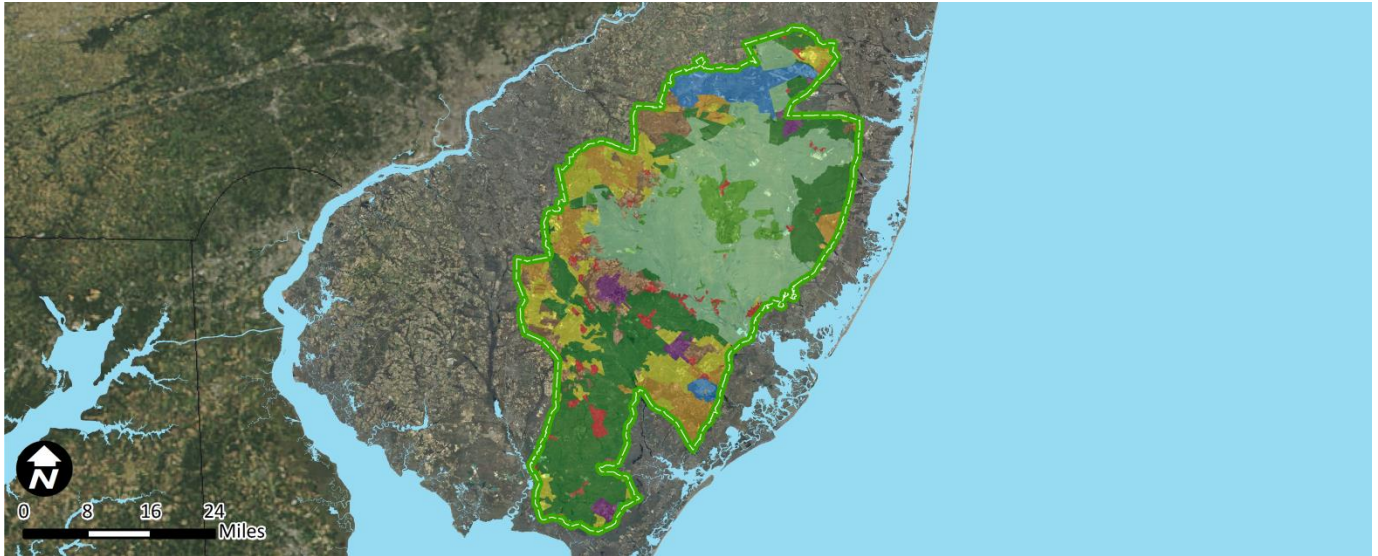


*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Pinelands Area Municipalities

Pinelands Area 2010 population: 312,869

Pinelands Area acreage: 938,000



Pinelands Management Areas

Conservation

- 31% Preservation
- 27% Forest
- 7% Agricultural Production
- 4% Special Ag Production

Development

- 8% Regional Growth
- 2% Pinelands Town
- 3% Pinelands Village

Intermediate

- 12% Rural Development
- Federal**
- 5% Military & Federal

- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area

2013 Variables	Pinelands Municipal Value	Non-Pinelands Municipal Value	New Jersey Value
Population Estimate	704,526	1,727,102	8,899,339
Population Density (per mile ²)	327	1,218	1,136
Population Change - 2010 to 2013	0.9%	0.2%	1.2%
% Land Protected in Pinelands Area	100%	-	-
Assessed Acres of Farmland	174,274	284,224	967,795
Building Permits Issued	1,469	5,138	24,185
Housing Transactions	4,167	10,217	49,987
Average Home Sale Price	\$226,661	\$322,642	\$384,000
Avg. Equalized Prop. Value (millions)	\$1,470.5	\$1,531.9	\$2,053.5
Average Effective Tax Rate	2.27	2.52	2.42
Average Residential Property Tax Bill	\$5,049	\$5,895	\$7,988
Per Capita Income Estimate (2012)	\$29,176	\$32,566	\$33,924
Estimated Unemployment Rate	9.3%	9.1%	8.2%
Private Sector Employment 140,446	Private Sector Establishments 12,409	Private Sector Avg. Annual Wages \$37,728	

Pinelands Area Census Housing Data Change 2000 - 2010

