

New Jersey Pinelands Commission

Long Term Economic Monitoring Program



2015 Annual Report

Sean W. Earlen, Chairman

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**NEW JERSEY PINELANDS LONG-TERM ECONOMIC
MONITORING PROGRAM
*2015 ANNUAL REPORT***

June 2016

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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.

The report is also available from the Pinelands Commission free of charge on CD-ROM. Requests can be mailed to:

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Executive Summary

The 2015 Long Term Economic Monitoring Report, covering data from 2014, provides the results of the ongoing monitoring program that tracks economic conditions in the Pinelands Region. This report presents economic data and describes key trends in the areas of population, real estate, economic growth, and municipal finance. Data is updated annually when available. The general analytical approach is to compare economic trends (from 1980 onward) of Pinelands municipalities to Non-Pinelands municipalities and the state as a whole. Efforts are made to obtain data that is representative of the Pinelands Area. When this scale of data is not available, municipal data is used instead. In this report, the “Pinelands municipalities” refers to an aggregate of 47 municipalities that have at least 10% of their land area within the state-designated Pinelands Area (only 11 of these are entirely within the Pinelands Area; the remaining municipalities straddle the Pinelands Area boundary). The “Non-Pinelands municipalities” refers to an aggregate of the remaining 155 municipalities located in the eight counties of southern New Jersey.

Population

In 2014, the Pinelands municipalities’ population grew by about 1,000 people – a less than 1% increase – whereas the Non-Pinelands municipalities actually saw a decrease of about 200 people. The population growth rate in the Pinelands municipalities has been lessening every year since the 2010 census. The average median age in the Pinelands has remained steady at about 43 years old. The *2015 Annual Report* contains poverty rate as a supplemental variable. The Pinelands municipalities registered an 8% poverty rate, which is lower than the Non-Pinelands municipalities (12%) and the rest of the state (11%).

Real Estate

For the second straight year, the Non-Pinelands municipalities outpaced the Pinelands municipalities in the average number of home building permits issued. The Pinelands municipalities issued an average of 28 permits while the Non-Pinelands municipalities issued an average of 40 permits.

In the Pinelands Area, the housing market experienced an uptick in the number of homes sold in 2014 (up 23%), for an average selling price of \$227,370; home prices were down 2.5% from 2013. The area outside the Pinelands Area also saw a 17 % increase in homes sold, while prices also decreased by 1.5% from the prior year.

Economic

The *2015 Annual Report* contains updated information on per capita income for 2014. In the Pinelands Area, per capita income decreased to about \$30,100 from 2012, a 1% drop. Outside the Pinelands Area, a 3% decrease from 2012 resulted in an income of \$35,700 per capita.

Unemployment decreased by 1.7 percentage points to 8.0% in the Pinelands municipalities while private sector employment figures showed an increase of about 3,500 jobs (up 2.5%). The number of private sector establishments actually increased for the first time since 2008; 269 establishments were added to the Pinelands municipalities (up about 2%). Despite the positive changes in employment and employers, private sector average annual wages continued their decline (down 6% from 2013).

With the release of the 2012 Economic Census (only released every 5 years), it was revealed that per capita retail sales declined by 7% in the Non-Pinelands economic places while those in the Pinelands declined by 10%.

In Pinelands agriculture, tax statistics showed a 2% decline in the number of acres devoted to horticulture whereas that statistic for the Non-Pinelands municipalities showed a 1% increase. Cranberry prices continued their decline (down 3% to 37¢ per pound) due to continued oversupply. Prices for New Jersey blueberries showed an increase from \$1.20 per pound in 2013 to \$1.40 per pound in 2014 (up 16%).

Municipal Finance

Sub-municipal data (i.e. data that is specific to the area within the Pinelands Area boundary) on property tax estimates were added to the program for the *2015 Annual Report*. The new data showed that the average Pinelands Area tax bill was \$5,585 in 2014. The average tax bill outside of the Pinelands Area was \$5,722. Municipal data showed that tax bills increased by less than half a percent in the Pinelands municipalities and by 1% in the Non-Pinelands municipalities. State equalized property valuations in both regions declined; Pinelands municipalities saw a property valuation decline of 3% while property valuations of Non-Pinelands municipalities fell by about 4%.

In 2014, per capita municipal budgets decreased slightly in the Pinelands municipalities to \$869 (down less than half a percent). Budgets in the Non-Pinelands municipalities increased 2% from 2013, to \$1,418 per capita.

Special Studies

As part of an ongoing special study, staff is seeking to improve the precision and accuracy of the economic monitoring data collected for the Annual Report. For example, 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 Area boundary. One solution that began with the *2013 Annual Report* is the purchase of U.S Census block group level data from ESRI. For the *2014 Annual Report*, individual home sales information from the NJ Division of Taxation was used to provide sub-municipal data for home sales and prices. In this year’s report, MODIV tax data was utilized to calculate and average tax bills for individual homes inside and outside the Pinelands Area boundary.

Conclusion

The year 2014 was one of mixed results for the Pinelands and southern New Jersey as a whole. The real estate market shows as one in recovery with increased home sales, but decreased prices. Meanwhile, more people are finding jobs as employment and the number of employers grows. At the same time, a surplus in workers is possibly resulting in lower average annual wages. Municipalities continue to increase taxes to pay for services and to offset continually decreasing state-aid.

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 region's environmental and cultural resources. 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.^{1,2}

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 2014, is the eighteenth in the series and augments most of the data used to develop the 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.

The program was designed to accomplish several principal objectives:

¹ 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.

² See "Tracking New Jersey's Dynamic Landscape: Urban Growth and Open Space Loss 1986-1995-2002" by Hasse and Lathrop, 2008.

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 are primarily responsible for the day-to-day implementation of the program, including the acquisition and analysis of data; coordination with the NPS, public outreach, and the 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 comparing trends and to enable the 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 2014, includes a look at poverty rates as a supplemental variable. Supplemental variables can provide valuable information and insight into the Pinelands and the 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. Three variables are tracked annually for this variable group: building permits, the average selling price of homes, and the volume of residential real estate transactions.

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 region's economic well-being. 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 ³					
				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	2014	Decennial/Annual			X	X		
Population Estimates	2001-2013	2014	Annual			X			
Building Permits	1980-2013	2014	Annual			X			
Average Selling Prices of Homes	1994-2013	2014	Annual			X			X
Volume of Real Estate Transactions	1994-2013	2014	Annual			X			X
Retail Sales & Establishments	1992, 1997, 2002, 2007	2012	Quintennial		X	X ⁴			
Per Capita Income	1979, 1989, 1999, 2010, 2012	2014	Decennial/Annual			X	X		
Unemployment	1990-2013	2014	Annual			X			
Employment	2004-2013	2014	Annual			X			
Number of Establishments	2004-2013	2014	Annual			X			
Wages	2004-2013	2014	Annual			X			
Farmland Assessed Acreage	2009-2013	2014	Annual			X			
Agricultural Census Data	1992, 1997, 2002, 2007, 2012		Quintennial		X				
Berry Production	1980-2013	2014	Annual	X					
Average Residential Property Tax Bill ⁵	1998-2013	2014	Annual			X			X
Equalized Property Value	1998-2013	2014	Annual			X			
Effective Tax Rate	2000-2013	2014	Annual			X			
Assessment Class Proportions	1999-2013	2014	Annual			X			
Local Municipal Purpose Revenues	1999-2013	2014	Annual			X			
2015 Supplemental: Poverty Rates	1999, 2010, 2014	1999, 2010, 2014	-		X	X			

³ St. = State, Co. = County, Mu. = Municipal, BG = Block Group, Bl. = Census Block, Pt. = Point

⁴Data 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 35 Pinelands municipalities.

⁵ The block data acquired for property tax bills are tax blocks; not census blocks as is collected for other variables.

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 *2015 Annual Report* includes data on poverty as a supplemental variable. The decennial U.S. Census included poverty rates until the 2000 Census. After that point, the poverty was estimated as part of the annual American Community Survey (ACS). Data is available on a municipal scale, however due to the potential for errors with using ACS data, municipalities are not evaluated individually; instead they are aggregated to allow for inside/outside Pinelands and Non-Pinelands analysis.

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 are classified as inside, while six⁶ are 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 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 2014 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 of "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* within the Pinelands Area. The remaining municipalities that straddle the boundary are considered split towns.

The current method of evaluating split towns depends upon land area. Municipalities that have at least 10% of their land area within the Pinelands Area are considered to be Pinelands municipalities. 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. Conversely, 94% of Hamilton Township's population is inside the Pinelands Area despite its status as a split town.

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 are being 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 during inter-census years. For example, ESRI block group level data has provided estimates on median age as well as per capita income.

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.

New to the *2015 Annual Report*, tax block/lot data was utilized to estimate average tax bills for the Pinelands Area and the Non-Pinelands. This data is useful for gaining a better understanding of how tax bills differ at a finer scale than is provided by the averaged municipal data.

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.) in 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 draft model to measure fiscal stress uses 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.

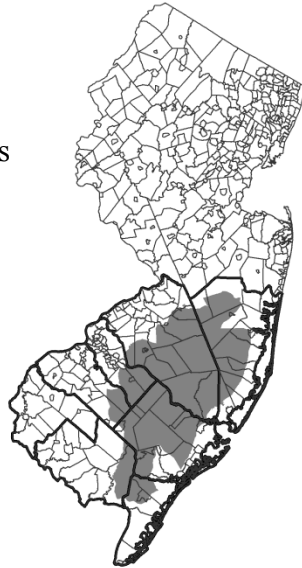
This study may act as a guideline for more efficiently channeling state aid to those municipalities that may have been shortchanged in the past. It can, and has been used, as a guide to provide different Comprehensive Management Plan standards for distressed municipalities in rulemaking. The study may 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.

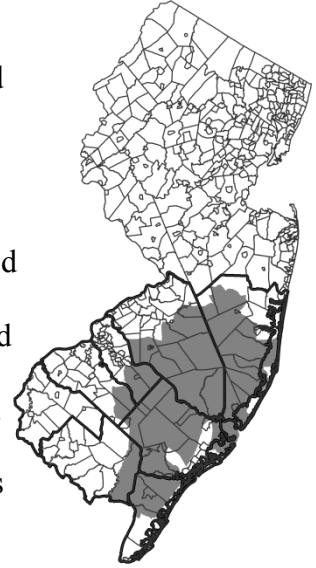
4. LTEM Annual Report of Indicators

Geographic Definitions

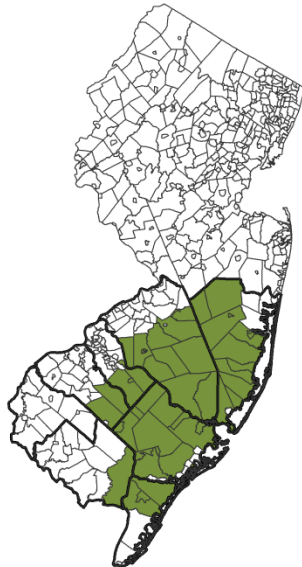
State-Designated Pinelands Area: the area designated by The Pinelands Protection Act. This is the state-designated area under the jurisdiction of the Pinelands Commission.



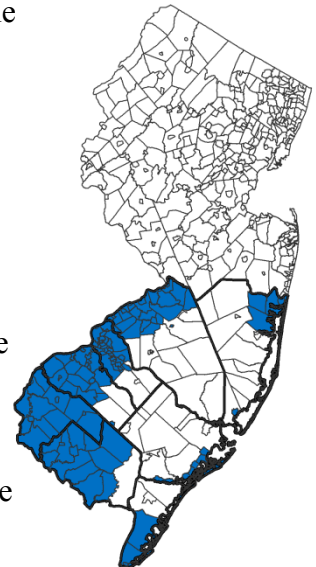
Pinelands National Reserve: the area designated by The National Parks and Recreation Act of 1978. This is the federally designated area that includes the state-designated area plus areas under CAFRA and DEP jurisdiction. This report focuses on the state-designated area only.



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

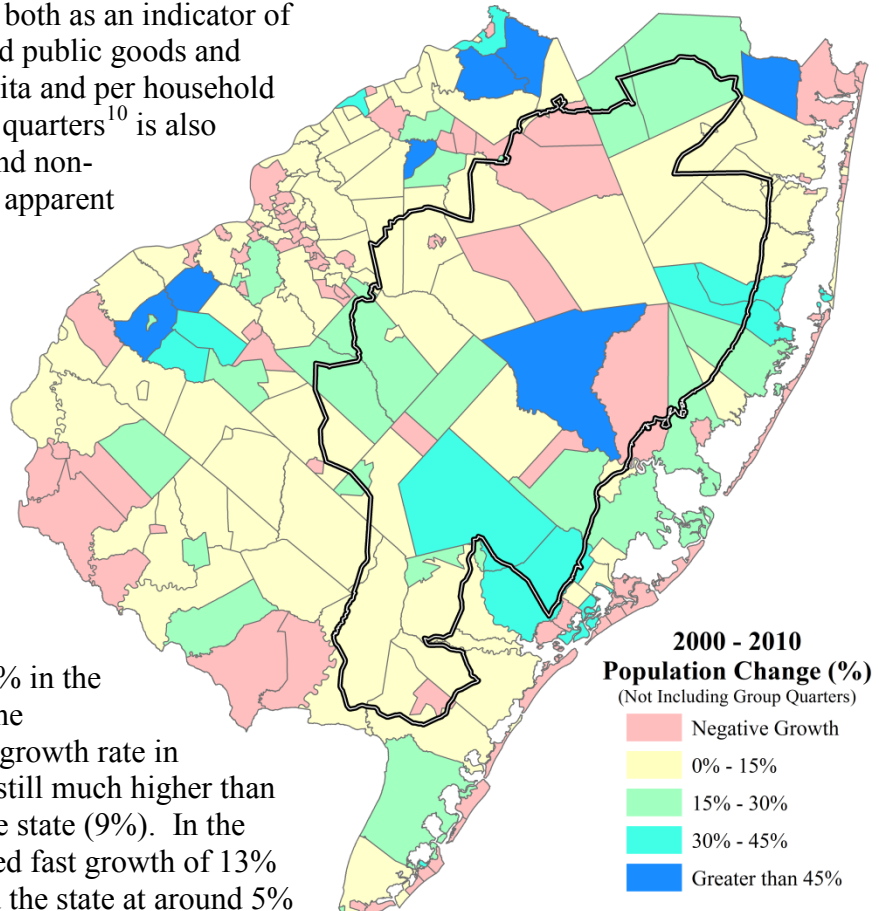
U.S. Census Bureau 1980, 1990, 2000, 2010
Last Updated for 2012 LTEM with 2010 data

The Pinelands population has grown more quickly than both the Non-Pinelands and the state in every decade since 1980. As of the 2010 U.S. Census, the Pinelands municipalities had 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. During the 30-year period, the population in 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 saw their populations fall 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 municipalities to have losses 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.

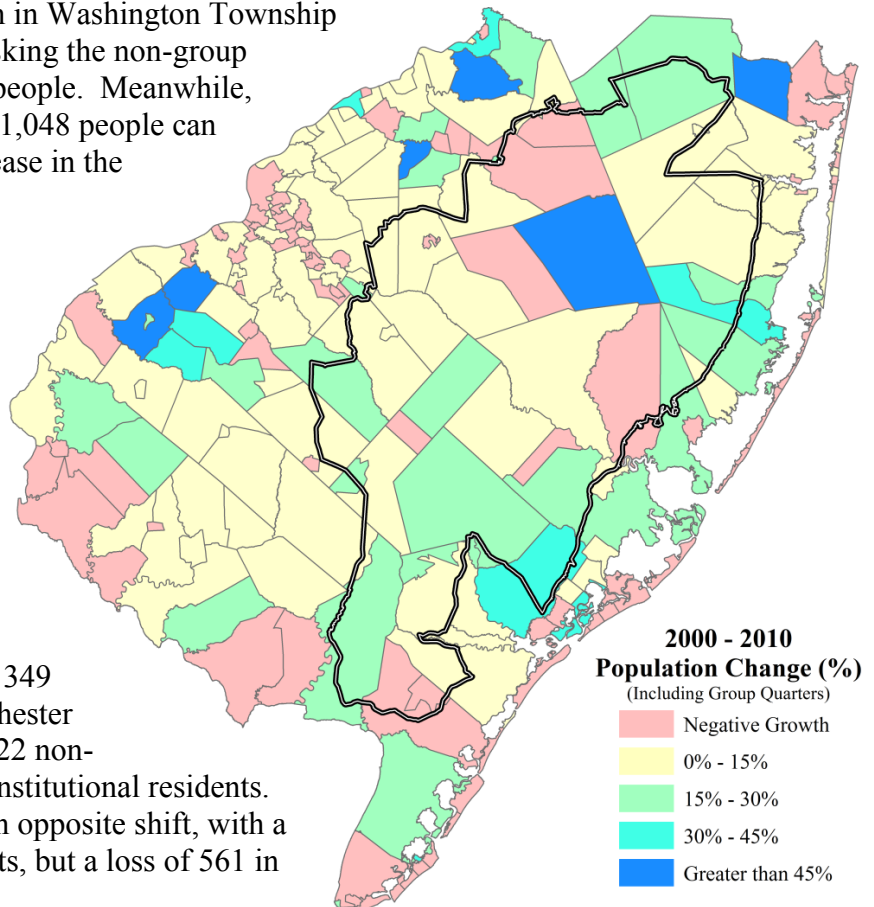


Table P1a

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%	< 1%
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%	> -1%
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

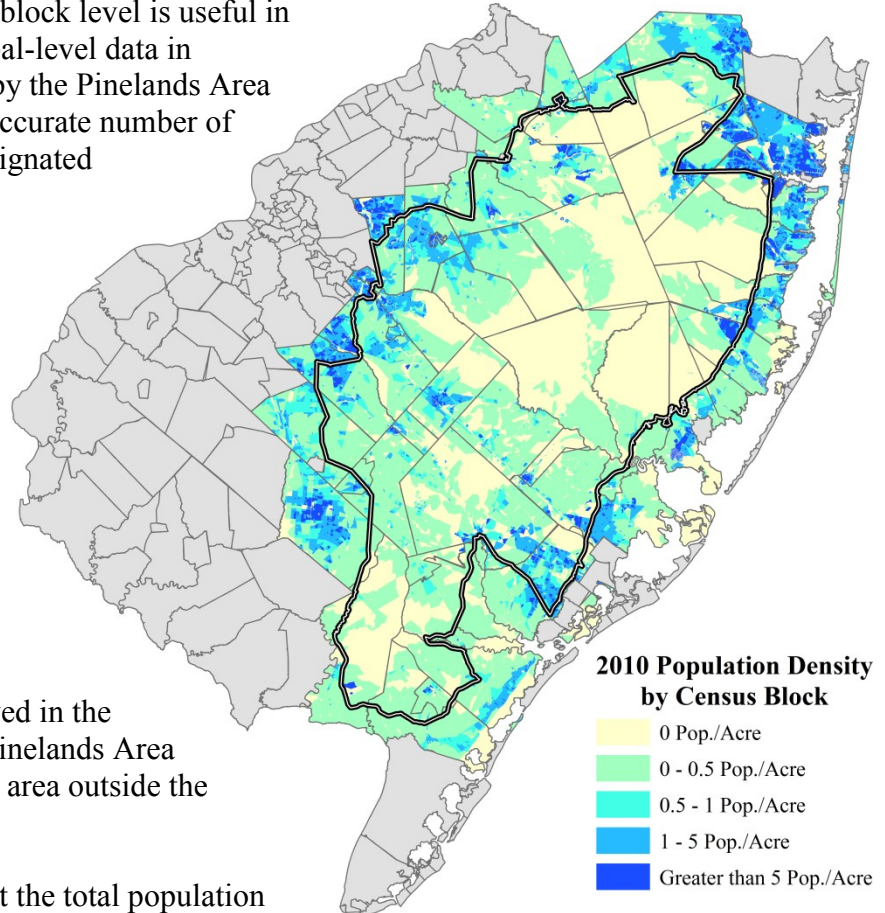
Most of the population growth occurring in Pinelands municipalities was occurring outside of the Pinelands Area boundary. From 1990 to 2010, the areas outside the Pinelands Area grew by 27%, while the areas inside only grew by 19%.

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%
Barneget 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 2014

Updated for 2015 LTEM with 2014 data

In 2014, the estimated average median age in the Pinelands Area was 43 years old. Outside the boundary, the estimated average median age in the Non-Pinelands was also 43 years old.

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. ESRI block group estimates allow for a calculation of the average median age inside/outside the Pinelands Area (as opposed to just the municipalities).

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. Estimates for 2014 put the average median age of the Pinelands and Non-Pinelands municipalities at 43 years old.

The youngest towns in the Pinelands continue to be those surrounding Joint Base McGuire-Dix-Lakehurst: Wrightstown Borough with a median age of 31 and Lakehurst Borough at 34. Manchester Township and Berkeley Township are the only towns to have median ages above 60 (66 and 63, respectively).

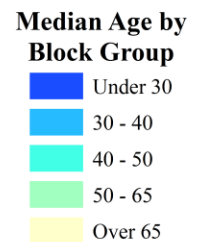
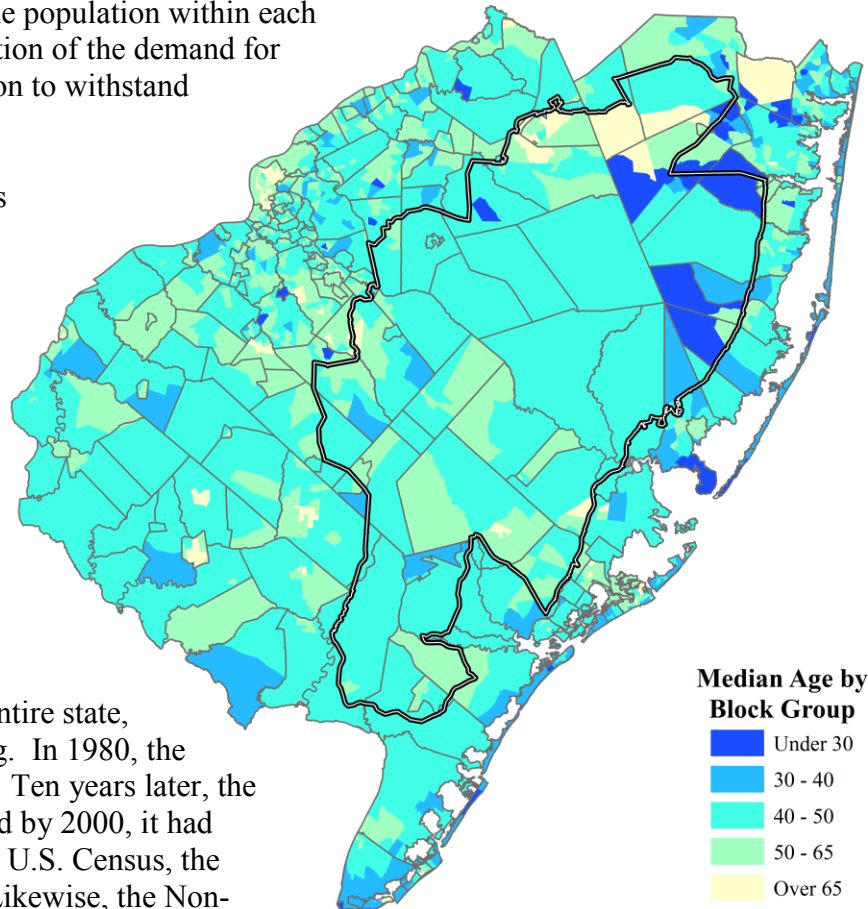


Table P3

Pinelands Municipal Median Age – 1980 to 2014

Municipality	County	1980	1990	2000	2010	2014 Estimate
Manchester Township	Ocean	66	68	68	65	66
Berkeley Township	Ocean	59	65	66	61	63
Southampton Township	Burlington	44	46	50	54	57
Weymouth Township	Atlantic	29	33	39	50	53
Ocean Township	Ocean	45	35	38	50	52
Barnegat Township	Ocean	29	33	39	46	47
Chesilhurst Borough	Camden	28	36	42	46	47
Little Egg Harbor Township	Ocean	37	35	40	45	47
Port Republic City	Atlantic	33	36	41	46	47
Dennis Township	Cape May	30	33	37	45	46
Stafford Township	Ocean	32	38	40	44	46
Estell Manor City	Atlantic	30	32	37	43	45
Medford Township	Burlington	31	37	40	44	45
Eagleswood Township	Ocean	33	35	39	43	45
Upper Township	Cape May	32	34	38	44	45
Tabernacle Township	Burlington	29	33	38	43	45
Woodland Township	Burlington	33	36	38	43	44
Bass River Township	Burlington	32	33	38	43	44
Medford Lakes Borough	Burlington	32	37	40	42	43
Washington Township	Burlington	35	37	41	44	43
Woodbine Borough	Cape May	30	33	36	43	43
Buena Vista Township	Atlantic	29	35	39	42	43
Shamong Township	Burlington	29	34	37	42	43
Folsom Borough	Atlantic	27	32	38	42	43
Jackson Township	Ocean	29	32	35	42	43
Mullica Township	Atlantic	29	33	37	42	43
Lacey Township	Ocean	35	37	39	41	43
Plumsted Township	Ocean	29	33	36	41	42
Evesham Township	Burlington	29	32	36	41	42
New Hanover Township	Burlington	21	24	32	41	41
Franklin Township	Gloucester	28	31	36	40	41
Waterford Township	Camden	29	31	36	40	41
Hammonton Town	Atlantic	33	37	39	40	40
Egg Harbor Township	Atlantic	31	33	36	39	40
Monroe Township	Gloucester	29	33	37	39	40
Berlin Township	Camden	28	32	36	39	39
Galloway Township	Atlantic	28	30	34	39	39
Maurice River Township	Cumberland	31	33	36	38	38
Winslow Township	Camden	29	31	34	37	38
Hamilton Township	Atlantic	30	31	35	37	38
Beachwood Borough	Ocean	29	31	35	37	38
Buena Borough	Atlantic	32	34	36	37	37
Pemberton Township	Burlington	26	30	34	37	37
Egg Harbor City	Atlantic	29	32	35	36	36
South Toms River Borough	Ocean	24	28	32	34	35
Lakehurst Borough	Ocean	26	28	32	32	34
Wrightstown Borough	Burlington	22	24	31	30	31
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Springfield Township	Burlington	31	36	39	44	46
Toms River Township	Ocean	33	36	40	43	44
Berlin Borough	Camden	31	35	38	41	42
Corbin City	Atlantic	50	37	37	39	40
Vineland City	Cumberland	31	34	37	38	38
North Hanover Township	Burlington	25	27	29	29	28

P4 Population Estimates

U.S. Census Bureau/N.J. Department of Labor 2008 - 2014

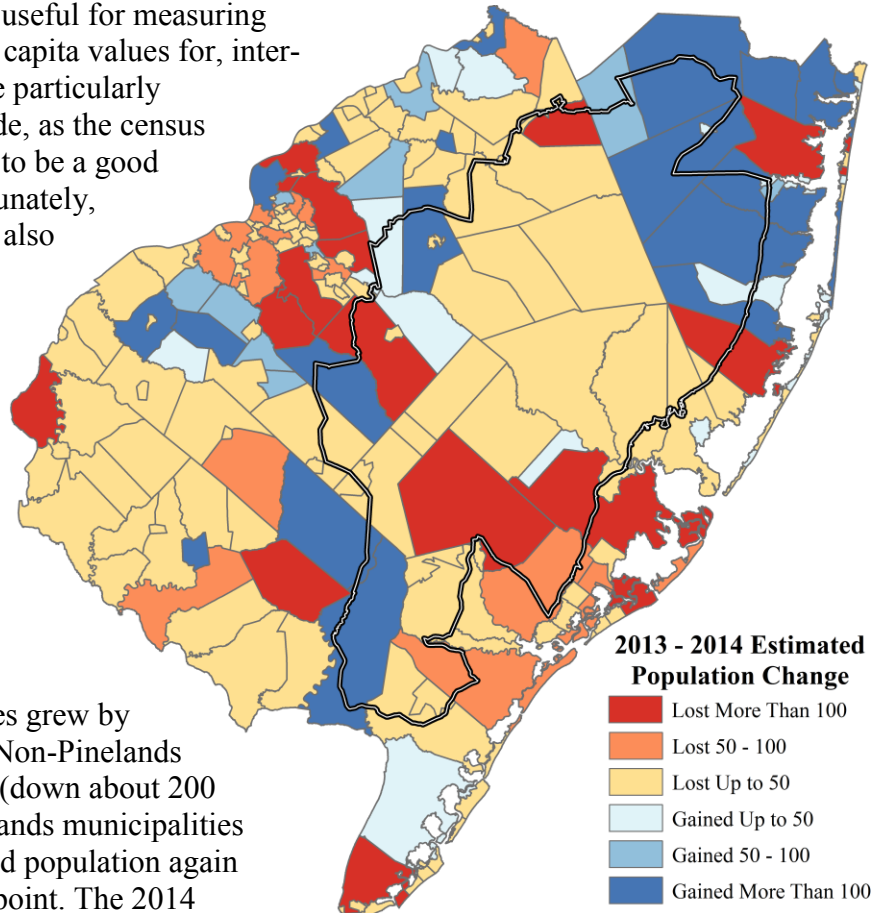
Updated for 2015 LTEM with 2014 data

In 2014, the Pinelands added an estimated 1,000 people (< 1% increase). This continues the trend of the Pinelands adding a greater percentage of residents than the Non-Pinelands, which saw a loss of about 200 people (< 0.1% decrease).

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 municipalities grew by about 1,000 people in 2014 while the Non-Pinelands again saw a decrease in its population (down about 200 people). The growth trend in the Pinelands municipalities continues to slow as the 2014 estimated population again grew by less than one full percentage point. The 2014 growth rate declined by about 31% from 2013.



2013 - 2014 Estimated Population Change

- Red: Lost More Than 100
- Orange: Lost 50 - 100
- Yellow: Lost Up to 50
- Light Blue: Gained Up to 50
- Medium Blue: Gained 50 - 100
- Dark Blue: Gained More Than 100

Population Estimates

Region	2010	2011	2012	2013	2014	5-Year Change	5-Year % Change
Pinelands	698,092	701,018	702,935	704,310	705,262	7,170	1%
Non-Pinelands	1,723,949	1,726,247	1,727,178	1,725,583	1,725,407	1,458	< 1%
State	8,803,580	8,842,614	8,876,000	8,911,502	8,938,175	134,595	2%

Maurice River saw growth of 3% (an increase of 264 people) from 2013; this was the greatest of the Pinelands municipalities. Monroe Township, Barnegat Township, and South Toms River Borough were the only other municipalities to have growth rates exceeding 1%. Seventeen municipalities had positive growth, with an average growth rate of about 1%. Among those with a population decrease, New Hanover Township had the greatest percentage lost (down 8%) as well as absolute number of people lost (660 people). Washington Township was the only other municipality to have a greater than 1% decrease in population. In all, 29 municipalities saw a decrease at an average rate of about half a percent. Five-year trends are shown on Table P4.

Table P4

Municipal Population Estimates

Municipality	County	2009	2010 Census	2011	2012	2013	2014	5-Year Change	5-Year % Change
Barnegat Township	Ocean	20,563	20,936	21,298	21,429	21,913	22,303	1,740	8%
Ocean Township	Ocean	8,211	8,332	8,450	8,519	8,651	8,658	447	5%
Monroe Township	Gloucester	35,784	36,129	36,613	36,643	36,684	37,379	1,595	4%
Jackson Township	Ocean	54,094	54,856	55,346	55,624	56,069	56,449	2,355	4%
Egg Harbor Township	Atlantic	42,528	43,323	43,526	43,723	43,920	43,851	1,323	3%
Little Egg Harbor Township	Ocean	19,811	20,065	20,244	20,482	20,396	20,396	585	3%
Plumsted Township	Ocean	8,356	8,421	8,454	8,474	8,524	8,584	228	3%
Woodland Township	Burlington	1,751	1,788	1,797	1,794	1,798	1,795	44	3%
Lacey Township	Ocean	27,555	27,644	27,721	27,830	28,015	28,211	656	2%
Lakehurst Borough	Ocean	2,656	2,654	2,661	2,664	2,699	2,713	57	2%
Beachwood Borough	Ocean	11,023	11,045	11,069	11,102	11,173	11,253	230	2%
South Toms River Borough	Ocean	3,691	3,684	3,690	3,697	3,718	3,762	71	2%
Stafford Township	Ocean	26,304	26,535	26,643	26,949	26,936	26,809	505	2%
Hamilton Township	Atlantic	26,165	26,503	26,683	26,797	26,775	26,647	482	2%
Berkeley Township	Ocean	41,267	41,255	41,386	41,504	41,832	41,950	683	2%
Manchester Township	Ocean	42,868	43,070	43,010	43,063	43,317	43,555	687	2%
Medford Township	Burlington	23,006	23,033	23,132	23,246	23,245	23,357	351	2%
Eagleswood Township	Ocean	1,593	1,603	1,608	1,612	1,621	1,617	24	2%
Galloway Township	Atlantic	37,062	37,349	37,324	37,397	37,683	37,583	521	1%
Buena Borough	Atlantic	4,568	4,603	4,608	4,627	4,630	4,610	42	1%
Weymouth Township	Atlantic	2,691	2,715	2,713	2,718	2,721	2,711	20	1%
Port Republic City	Atlantic	1,113	1,115	1,113	1,116	1,124	1,121	8	1%
Waterford Township	Camden	10,657	10,649	10,653	10,671	10,731	10,732	75	1%
Evesham Township	Burlington	45,355	45,538	45,750	45,736	45,566	45,613	258	1%
Estell Manor City	Atlantic	1,730	1,735	1,724	1,733	1,738	1,736	6	< 1%
Hammonton Town	Atlantic	14,741	14,791	14,759	14,782	14,813	14,765	24	< 1%
Berlin Township	Camden	5,355	5,357	5,385	5,375	5,356	5,362	7	< 1%
Chesilhurst Borough	Camden	1,625	1,634	1,638	1,634	1,635	1,626	1	< 1%
Buena Vista Township	Atlantic	7,587	7,570	7,568	7,595	7,604	7,586	-1	> -1%
Mullica Township	Atlantic	6,156	6,147	6,154	6,177	6,181	6,155	-1	> -1%
Tabernacle Township	Burlington	6,972	6,949	7,003	7,000	6,964	6,954	-18	> -1%
Egg Harbor City	Atlantic	4,278	4,243	4,239	4,242	4,250	4,264	-14	> -1%
Wrightstown Borough	Burlington	799	802	802	801	797	795	-4	-1%
Bass River Township	Burlington	1,450	1,443	1,450	1,449	1,446	1,442	-8	-1%
Winslow Township	Camden	39,118	39,499	39,274	39,263	39,117	38,895	-223	-1%
Pemberton Township	Burlington	27,999	27,912	27,947	27,966	27,870	27,822	-177	-1%
Franklin Township	Gloucester	16,809	16,820	16,801	16,747	16,720	16,702	-107	-1%
Medford Lakes Borough	Burlington	4,152	4,146	4,140	4,147	4,129	4,110	-42	-1%
Washington Township	Burlington	680	687	687	685	684	673	-7	-1%
Southampton Township	Burlington	10,474	10,464	10,458	10,431	10,383	10,362	-112	-1%
Shamong Township	Burlington	6,502	6,490	6,477	6,473	6,439	6,432	-70	-1%
Folsom Borough	Atlantic	1,895	1,885	1,884	1,877	1,878	1,870	-25	-1%
Upper Township	Cape May	12,298	12,373	12,269	12,245	12,185	12,113	-185	-2%
Maurice River Township	Cumberland	8,063	7,976	8,159	8,092	7,659	7,923	-140	-2%
Woodbine Borough	Cape May	2,486	2,472	2,458	2,458	2,448	2,439	-47	-2%
Dennis Township	Cape May	6,444	6,467	6,420	6,406	6,355	6,319	-125	-2%
New Hanover Township	Burlington	7,651	7,385	7,830	7,940	7,918	7,258	-393	-5%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>									
Vineland City	Cumberland	60,422	60,724	60,947	61,015	61,047	61,171	749	1%
North Hanover Township	Burlington	7,554	7,678	7,690	7,689	7,661	7,647	93	1%
Berlin Borough	Camden	7,491	7,588	7,604	7,611	7,588	7,546	55	1%
Corbin City	Atlantic	492	492	493	494	494	494	2	< 1%
Toms River Township	Ocean	91,349	91,239	91,953	92,151	91,618	91,250	-99	> -1%
Springfield Township	Burlington	3,402	3,414	3,416	3,416	3,401	3,387	-15	> -1%

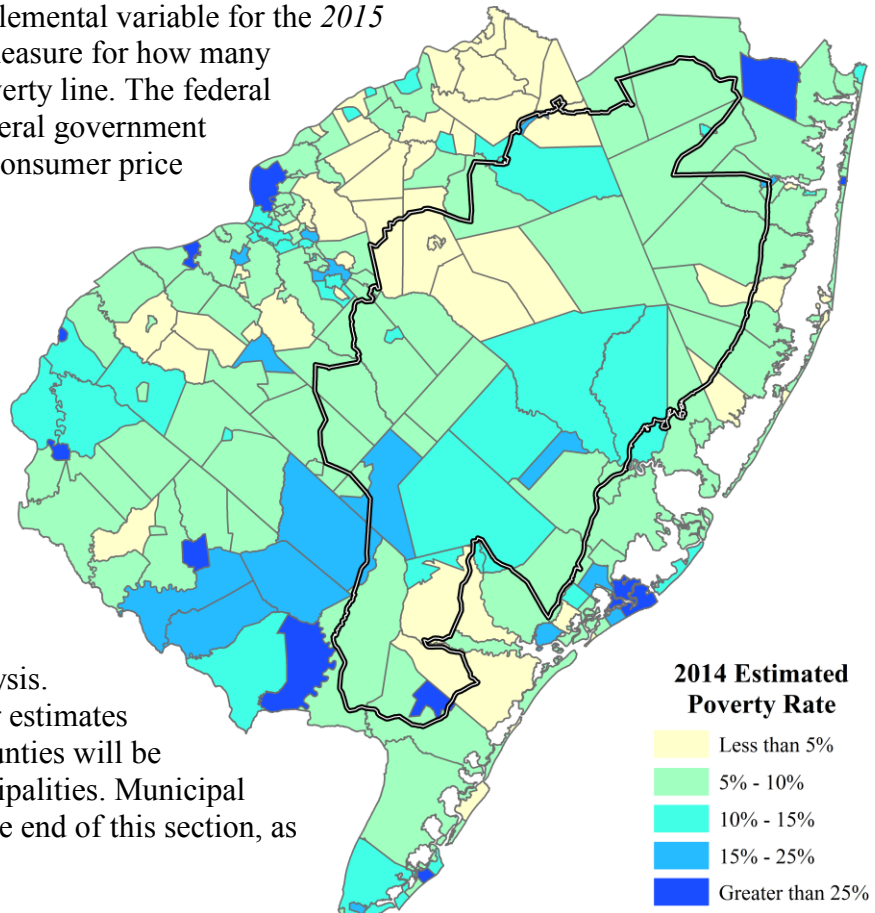
P5S Poverty Rate

U.S. Census Bureau – 2000, 2010, 2014
Supplemental Variable for 2015 LTEM

In 2014, the Pinelands municipalities had a poverty rate of 8% (up 39% from the 2000 Census). This rate is lower than that of the Non-Pinelands municipalities (12%) as well as the state (11%).

Description: The poverty rate is a supplemental variable for the 2015 *Annual Report*. The poverty rate is a measure for how many people are living below the federal poverty line. The federal poverty line was set in 1963 by the federal government and is adjusted annually based on the consumer price index (U.S. Census Bureau, 2012).

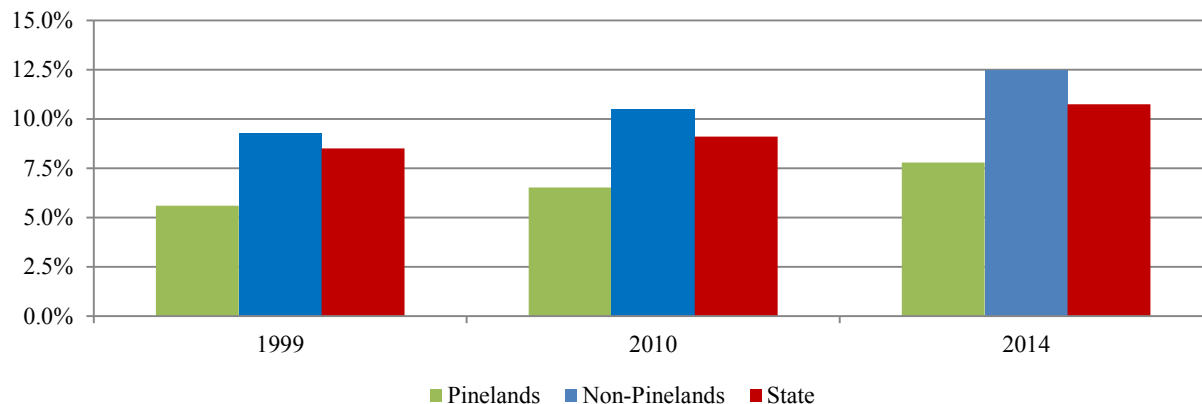
Unit of Analysis: The poverty rate is calculated by dividing the number of people estimated to be below the poverty line by the population for whom poverty status is determined. The 2000 Census was the last census to measure poverty rates. From then on, the American Community Survey (ACS) measured poverty rates. Municipal level data is aggregated to allow for an inside/outside the Pinelands Area analysis. Due to ACS smaller sampling sizes for estimates that lead to larger margin of errors, counties will be compared in place of individual municipalities. Municipal data can still be found in the table at the end of this section, as well as in the Municipal Fact Book.



Findings: Available data shows that the Pinelands municipalities have a lower rate of poverty than the rest of the state. Figures from the 2000 Census show the poverty rate in the Pinelands municipalities to be about 6%. Non-Pinelands municipalities had a poverty rate of about 9% while the state’s overall rate was about 8%.

Region	1999	2010	2014
Pinelands	6%	7%	8%
Non-Pinelands	9%	10%	12%
State	8%	9%	11%

American Community Survey data from 2010 shows that poverty rates increased over the next ten years across all regions and in 2014, poverty continued to increase. From 2000 to 2014, poverty rates in the Pinelands municipalities increased by about 39% to a rate of 8%. Over the same period, rates in the Non-Pinelands municipalities increased by 34% to 12% and in the state as a whole, the overall rate increased by 26% to 11%. While the rate for the Pinelands municipalities increased the most among the three regions, its rate is still the lowest.



Among the individual counties in southern New Jersey, Burlington County had the lowest estimated poverty rate in 2014 at 6%, followed by Gloucester County at 8%. Cumberland and Atlantic counties had the greatest poverty rates at 18% and 15%, respectively. The only county without any land in the Pinelands Area, Salem County, had a 2014 poverty rate of 14%.

All eight counties saw increases to their poverty rates from 2000 to 2014. Ocean County saw their number of people in poverty increase by 82% to almost 64,000 people below the poverty line (the greatest increase in the state). Cape May County had the smallest increase (up 23% to about 10,500 people living below the poverty line).

Southern New Jersey County Poverty Rates by Year

County	1999	2010	2014
Atlantic	10%	12%	15%
Burlington	5%	6%	6%
Camden	10%	11%	13%
Cape May	9%	9%	11%
Cumberland	15%	16%	18%
Gloucester	6%	7%	8%
Ocean	7%	9%	11%
Salem	9%	10%	14%

Table P5S

Municipal Poverty Rates

Municipality	County	1999	2000	2014
Woodbine Borough	Cape May	18%	38%	33%
Egg Harbor City	Atlantic	13%	21%	21%
Wrightstown Borough	Burlington	24%	17%	19%
South Toms River Borough	Ocean	13%	22%	19%
Buena Vista Township	Atlantic	12%	14%	17%
Chesilhurst Borough	Camden	15%	8%	13%
Washington Township	Burlington	16%	21%	13%
Bass River Township	Burlington	5%	12%	13%
Hamilton Township	Atlantic	7%	10%	12%
Pemberton Township	Burlington	9%	11%	11%
Lakehurst Borough	Ocean	7%	4%	11%
Weymouth Township	Atlantic	5%	8%	11%
Mullica Township	Atlantic	8%	7%	11%
Egg Harbor Township	Atlantic	5%	6%	10%
Winslow Township	Camden	6%	6%	10%
Galloway Township	Atlantic	7%	7%	9%
Manchester Township	Ocean	6%	7%	9%
Little Egg Harbor Township	Ocean	7%	9%	9%
Dennis Township	Cape May	5%	8%	9%
Hammonton Town	Atlantic	9%	12%	8%
Barnegat Township	Ocean	6%	7%	8%
Berlin Township	Camden	6%	6%	8%
Maurice River Township	Cumberland	8%	10%	8%
Buena Borough	Atlantic	19%	11%	8%
Lacey Township	Ocean	5%	4%	8%
Plumsted Township	Ocean	5%	7%	8%
Monroe Township	Gloucester	6%	8%	8%
Folsom Borough	Atlantic	6%	6%	8%
Berkeley Township	Ocean	5%	7%	7%
Franklin Township	Gloucester	5%	7%	7%
Beachwood Borough	Ocean	4%	7%	7%
Waterford Township	Camden	6%	6%	7%
Southampton Township	Burlington	4%	5%	6%
Port Republic City	Atlantic	3%	3%	6%
Woodland Township	Burlington	3%	5%	6%
Jackson Township	Ocean	4%	4%	5%
Stafford Township	Ocean	4%	4%	5%
Ocean Township	Ocean	8%	4%	5%
Upper Township	Cape May	3%	4%	5%
Evesham Township	Burlington	3%	2%	4%
Estell Manor City	Atlantic	5%	6%	4%
Tabernacle Township	Burlington	2%	2%	3%
New Hanover Township	Burlington	4%	1%	3%
Medford Township	Burlington	2%	2%	3%
Shamong Township	Burlington	3%	4%	2%
Eagleswood Township	Ocean	4%	6%	2%
Medford Lakes Borough	Burlington	2%	6%	2%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>				
Vineland City	Cumberland	14%	13%	17%
Berlin Borough	Camden	3%	7%	9%
Corbin City	Atlantic	5%	7%	8%
Toms River Township	Ocean	6%	6%	7%
North Hanover Township	Burlington	5%	8%	4%
Springfield Township	Burlington	4%	3%	2%

R1 Building Permits for Dwelling Units

N.J. Department of Labor 1980 – 2014

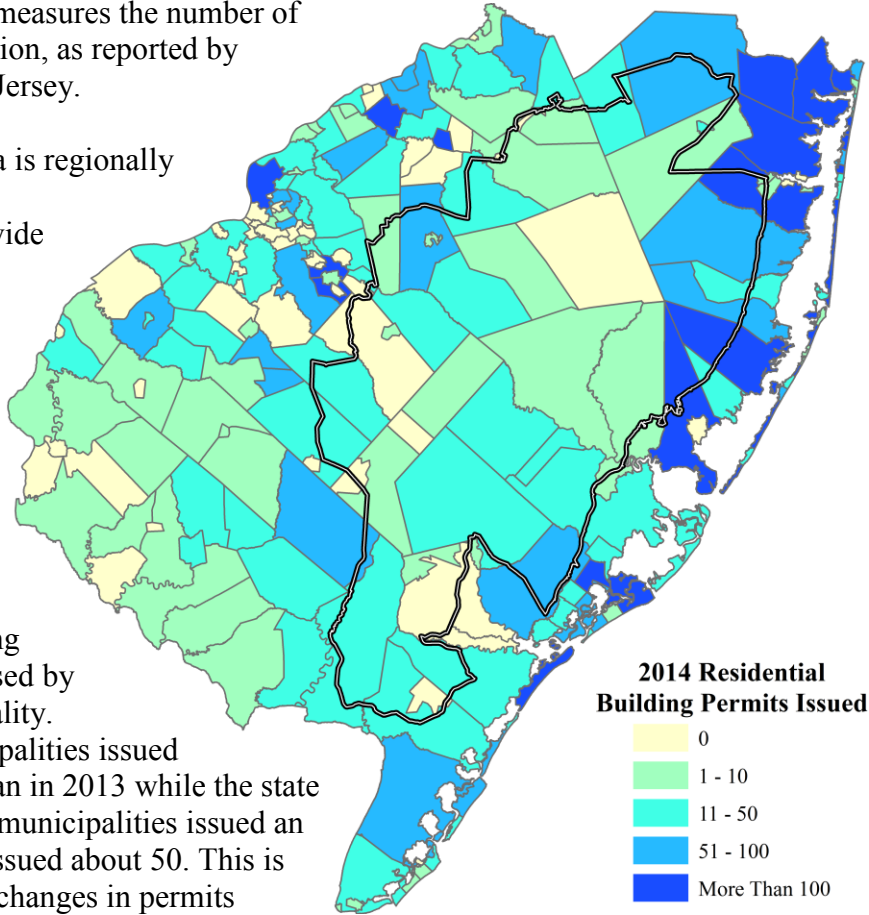
Updated for 2015 LTEM with 2014 data

For the second straight year, the Non-Pinelands outpaced the Pinelands municipalities in the average number of home building permits that were issued. The Pinelands municipalities issued an average of 28 permits compared to 40 in the Non-Pinelands.

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

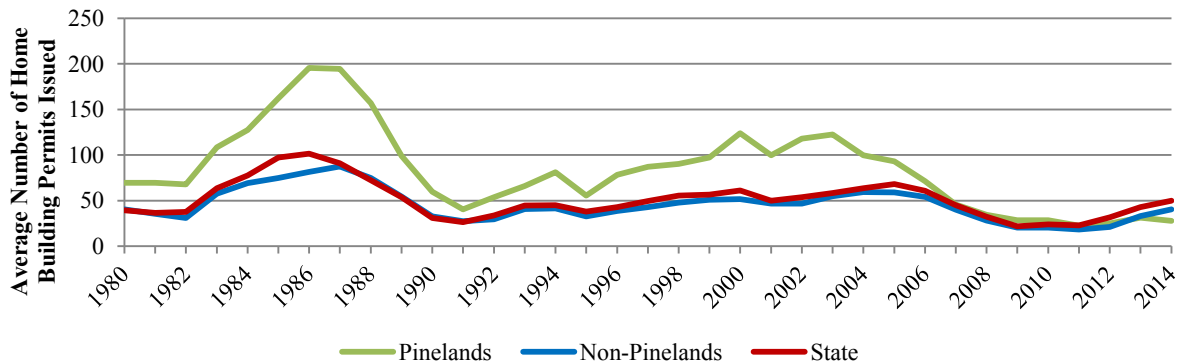
Unit of Analysis: Municipal level data is regionally aggregated and averaged to allow for inside/outside the Pinelands and statewide analysis.

Findings: Historically, the Pinelands municipalities issued more average building permits than the Non-Pinelands and the state until the national recession in 2007. Since then, the three regions mostly mirror each another.

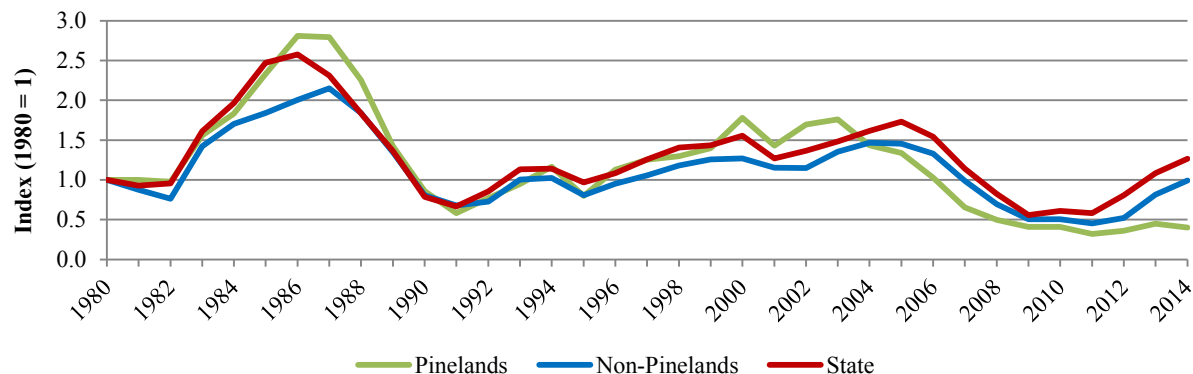


In 2014, the average number of building permits issued in the Pinelands decreased by 11% to 28 permits issued per municipality. Meanwhile, the Non-Pinelands municipalities issued 22% more permits per municipality than in 2013 while the state issued 16% more. The Non-Pinelands municipalities issued an average of 40 permits while the state issued about 50. This is a departure from prior years when the changes in permits issued were similar from region-to-region.

Average Residential Units Authorized by Building Permits



Index of Residential Units Authorized by Building Permits



In 2014, Stafford Township issued more residential building permits (284) than any other Pinelands municipality. In addition, Stafford Township and Little Egg Harbor Township each issued 46 more permits in 2014 than they did in 2013 which was the greatest yearly increase among the Pinelands municipalities. Bass River Township boasts the greatest percentage increase, up 200% (but only 3 total permits issued). Of those municipalities with more than five permits issued, Jackson Township had the greatest increase of 79% to 61 total permits issued. Sixteen municipalities increased the number of permits issued by an average of 58% (28% if municipalities that issue five or less permits are excluded). Four municipalities saw no change in the number permits issued.

Of the 19 municipalities with a decrease in permits issued, the greatest decline occurred in Monroe Township (down 289 permits). The average decline was by 27% (24% if Monroe Township is excluded.) Five-year trends are shown on Table R1.

Table R1

Residential Building Permits Issued

Municipality	County	2010	2011	2012	2013	2014	5-Year Total	5-Year Average	5-Year Change	5-Year % Change
Stafford Township	Ocean	58	168	130	238	284	878	176	226	390%
Little Egg Harbor Township	Ocean	72	76	57	103	149	457	91	77	107%
Medford Township	Burlington	37	54	47	70	92	300	60	55	149%
Lacey Township	Ocean	27	45	50	82	81	285	57	54	200%
Berkeley Township	Ocean	71	56	71	81	116	395	79	45	63%
Waterford Township	Camden	16	22	38	36	34	146	29	18	113%
Galloway Township	Atlantic	16	21	32	31	33	133	27	17	106%
Lakehurst Borough	Ocean	2	0	7	0	12	21	4	10	500%
South Toms River Borough	Ocean	1	1	0	9	9	20	4	8	800%
Mullica Township	Atlantic	12	12	16	18	18	76	15	6	50%
Dennis Township	Cape May	8	10	11	11	12	52	10	4	50%
Shamong Township	Burlington	9	9	9	12	13	52	10	4	44%
Weymouth Township	Atlantic	1	1	1	0	4	7	1	3	300%
Bass River Township	Burlington	0	0	0	1	3	4	1	3	-
Eagleswood Township	Ocean	11	10	11	12	14	58	12	3	27%
Manchester Township	Ocean	3	1	1	2	5	12	2	2	67%
Port Republic City	Atlantic	0	1	3	1	2	7	1	2	-
Berlin Township	Camden	27	17	21	24	29	118	24	2	7%
Maurice River Township	Cumberland	11	7	13	14	13	58	12	2	18%
Franklin Township	Gloucester	19	14	18	25	21	97	19	2	11%
Beachwood Borough	Ocean	5	9	4	15	7	40	8	2	40%
Tabernacle Township	Burlington	2	1	1	2	3	9	2	1	50%
Buena Vista Township	Atlantic	5	7	4	6	6	28	6	1	20%
Egg Harbor City	Atlantic	15	14	13	17	16	75	15	1	7%
Plumsted Township	Ocean	15	14	16	17	16	78	16	1	7%
Hammonton Town	Atlantic	5	10	15	7	6	43	9	1	20%
New Hanover Township	Burlington	4	2	0	0	4	10	2	0	0%
Wrightstown Borough	Burlington	0	0	0	0	0	0	0	0	-
Washington Township	Burlington	3	2	4	2	3	14	3	0	0%
Folsom Borough	Atlantic	1	1	2	1	1	6	1	0	0%
Upper Township	Cape May	13	12	13	15	13	66	13	0	0%
Southampton Township	Burlington	13	10	12	13	12	60	12	-1	-8%
Estell Manor City	Atlantic	3	2	2	2	1	10	2	-2	-67%
Buena Borough	Atlantic	4	2	1	0	1	8	2	-3	-75%
Chesilhurst Borough	Camden	5	4	1	1	2	13	3	-3	-60%
Medford Lakes Borough	Burlington	9	8	7	6	5	35	7	-4	-44%
Woodland Township	Burlington	5	3	9	0	0	17	3	-5	-100%
Woodbine Borough	Cape May	6	3	0	4	1	14	3	-5	-83%
Pemberton Township	Burlington	18	22	17	13	7	77	15	-11	-61%
Ocean Township	Ocean	42	37	64	20	19	182	36	-23	-55%
Winslow Township	Camden	36	20	4	0	0	60	12	-36	-100%
Barneget Township	Ocean	118	51	161	122	73	525	105	-45	-38%
Egg Harbor Township	Atlantic	101	64	81	65	54	365	73	-47	-47%
Evesham Township	Burlington	55	37	101	11	6	210	42	-49	-89%
Hamilton Township	Atlantic	85	51	5	0	14	155	31	-71	-84%
Jackson Township	Ocean	155	80	45	34	61	375	75	-94	-61%
Monroe Township	Gloucester	208	63	61	326	37	695	139	-171	-82%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>										
Toms River Township	Ocean	368	103	76	418	803	1,768	354	435	118%
North Hanover Township	Burlington	11	9	11	15	14	60	12	3	27%
Springfield Township	Burlington	1	2	2	3	4	12	2	3	300%
Corbin City	Atlantic	5	2	1	2	1	11	2	-4	-80%
Vineland City	Cumberland	77	79	75	89	71	391	78	-6	-8%
Berlin Borough	Camden	9	7	4	1	0	21	4	-9	-100%

R2 Home Transactions and Prices

N.J. Department of the Treasury, Division of Taxation 1994 – 2014

Updated for 2015 LTEM with 2014 data

There were 1,832 homes sold in the Pinelands Area in 2014 at an average price of about \$227,000 (down 2% from 2013). In the Non-Pinelands, 15,061 homes were sold for an average of about \$303,000 (down 1.5% from 2013).

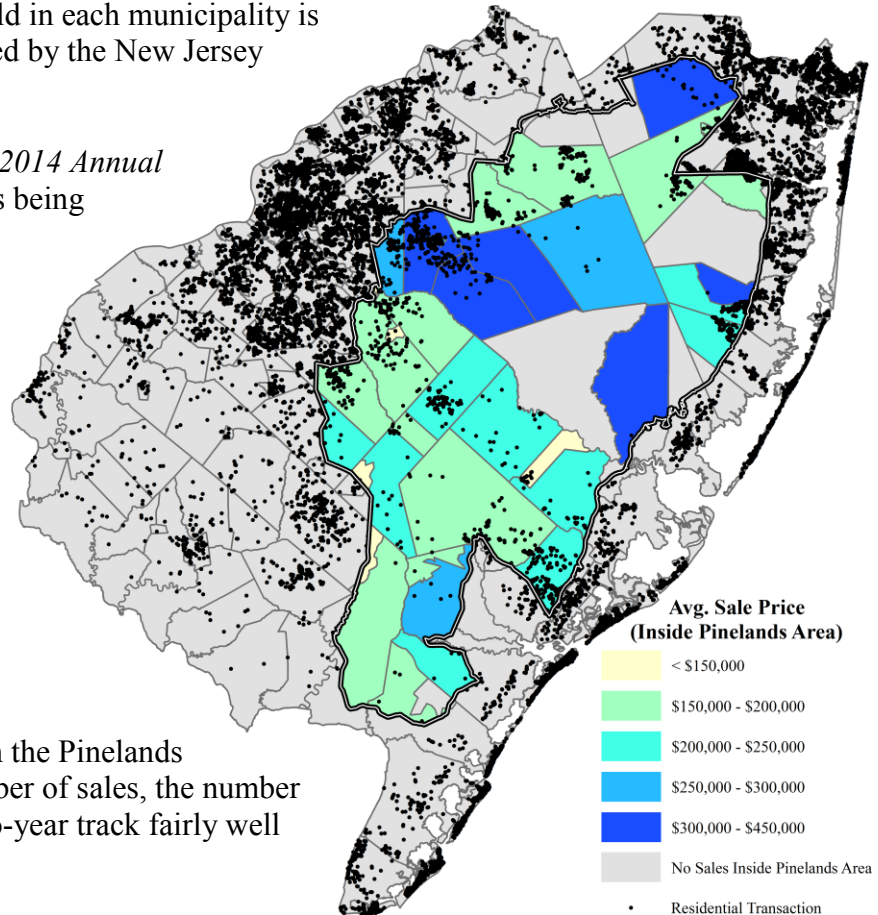
Description: The number of homes sold in each municipality is derived from usable sales data compiled by the New Jersey Department of Treasury.

Unit of Analysis: Beginning with the 2014 Annual Report, home sales data is identified as being inside or outside the Pinelands Area boundary. Therefore, home sales are aggregated to allow for inside/outside the Pinelands analysis¹². Until the additional years of data can be made available, the analysis will include the prior municipally aggregated data as a unit of analysis. Unless otherwise noted, the dollar amounts below are adjusted for inflation to 2014 dollars.

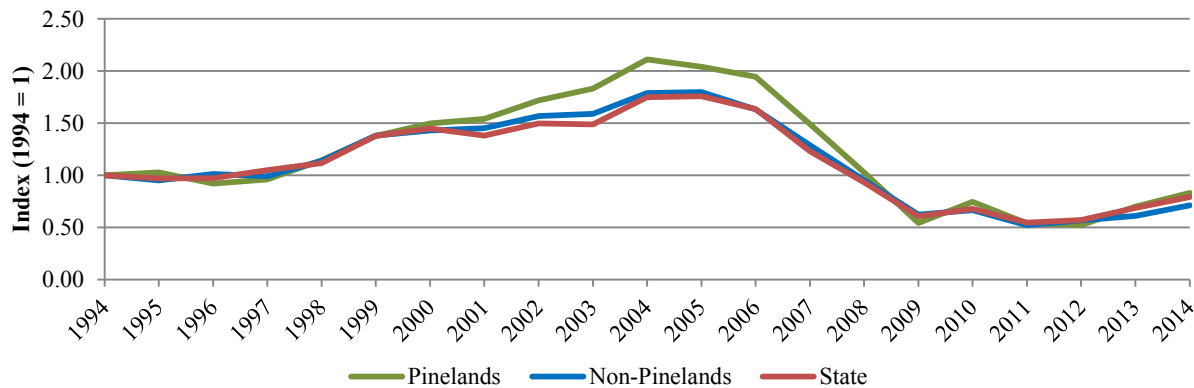
Findings:

Regional-level transaction data:

Aside from a period in the 2000s when the Pinelands municipalities averaged a greater number of sales, the number of residential transactions from year-to-year track fairly well with the rest of the state.



Index of Residential Property Transactions



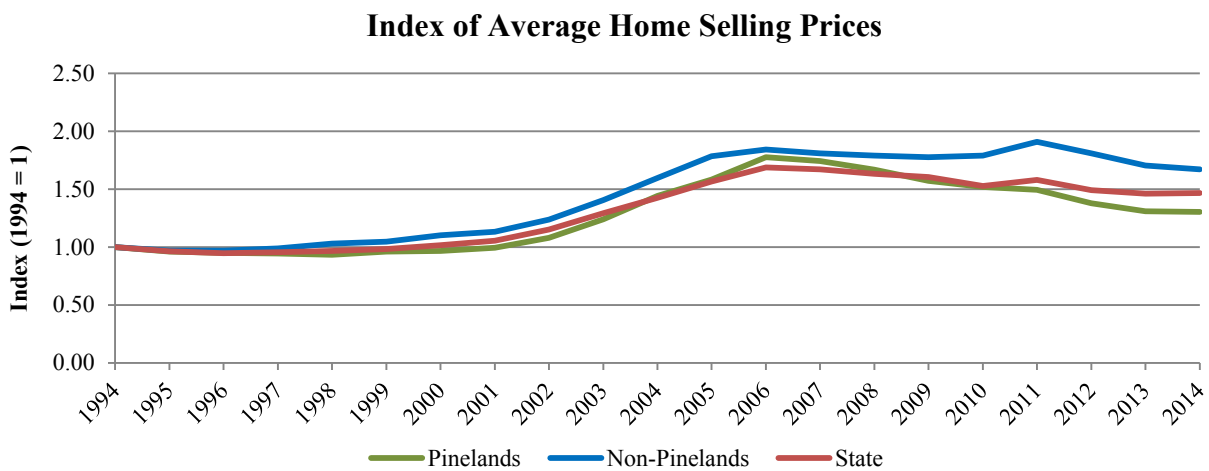
¹² Home sales data is obtained in database format for all real-estate transactions throughout New Jersey. Using Division of Taxation data, residential sales are filtered to isolate transactions that the Division refers to as “useable” The resulting data is then geocoded by address. Property transactions that are unable to be geocoded are then joined by tax block and/or manually matched to a street address.

For the second straight year, the number of home transactions in the Pinelands municipalities increased. In 2014, the number of sales totaled 4,964 (106 per municipality). This is a 19% increase over the prior year. The Non-Pinelands municipalities and the state also saw increases (for the third straight year) of 17% and 15% to 77 and 102 transactions per municipality, respectively. It is notable that the number of sales in the Pinelands municipalities has exceeded those in the Non-Pinelands municipalities every year since the monitoring period began in 1994.

Regional selling price data:

Home selling prices were rather stagnant in the late 1990’s before going through substantial increases in the early-to-mid 2000’s. With the national recession taking hold, prices began falling in the late 2000’s, but have recently begun to stabilize.

In 2014, home selling prices reflect a market that is slowly coming out of recession. The Pinelands average home price declined by less than half of one percent to about \$230,000. This is a significant slowdown from 2013’s 5% drop in average prices. In the Non-Pinelands, prices dropped at a greater rate; average prices fell by about 2% to \$321,000. At the statewide level, a stronger northern New Jersey housing market actually pulled the state upward for the first time since 2011 by about half a percent to an average price of \$392,000. For comparison, home prices in northern New Jersey were up by 1% to \$432,000.



Sub-municipal data:

Home buying in the Pinelands Area picked up substantially in 2014. The 1,832 homes sold inside the Pinelands Area boundary represent a 23% increase in sales over the prior year. Despite the increased activity, selling prices continued their decline from 2013. Homes in the Pinelands Area sold for an average of \$227,370; a decrease of about 2.5%. Outside the boundary, the Non-Pinelands saw a 17% increase in sales, bringing their total sold to 15,061. The average home in the Non-Pinelands sold for about \$302,631; a decrease of 1.5% from 2013.

By Pinelands Management Area, Preservation Area homes commanded the highest average price at about \$279,000. Homes in the Regional Growth Area followed at about \$234,000. The homes with the lowest average prices were in the Pinelands Village areas. As with the real estate market in 2013, the 2014 average prices in the Pinelands Management Areas had higher average prices than their counterparts in the Pinelands National Reserve (the only exception being Pinelands Town area homes).

Five-year municipal trends are shown on Tables R2a and R2b.

Homes Sold by Management Area (2014)

Pinelands Management Areas	Pinelands Area		National Reserve	
	Homes Sold	Avg. Price	Homes Sold	Avg. Price
Preservation Area	9	\$279,111	-	-
Forest Area	75	\$233,100	94	\$224,092
Agricultural Production Area	28	\$228,501	-	-
Rural Development Area	424	\$230,628	118	\$141,952
Regional Growth Area	1,032	\$234,492	1,155	\$215,100
Pinelands Town	187	\$177,513	11	\$192,955
Federal Military/Area	0	-	-	-
Pinelands Village	77	\$223,031	0	-
Special Ag. Production Area.	0	-	-	-

Table R2a

Residential Housing Transactions

Municipality	County	2010	2011	2012	2013	2014	5-Year Average
Berkeley Township	Ocean	150	239	319	654	636	400
Jackson Township	Ocean	393	249	311	400	467	364
Evesham Township	Burlington	376	179	176	340	390	292
Manchester Township	Ocean	215	181	210	200	498	261
Egg Harbor Township	Atlantic	332	226	258	107	279	240
Galloway Township	Atlantic	302	227	209	266	122	225
Stafford Township	Ocean	277	217	237	105	108	189
Lacey Township	Ocean	217	159	129	191	215	182
Monroe Township	Gloucester	195	117	167	152	224	171
Winslow Township	Camden	220	183	59	163	215	168
Medford Township	Burlington	182	159	49	195	215	160
Little Egg Harbor Township	Ocean	193	132	126	146	148	149
Hamilton Township	Atlantic	239	48	114	132	132	133
Pemberton Township	Burlington	189	119	91	104	124	125
Barnegat Township	Ocean	76	35	89	145	185	106
Southampton Township	Burlington	115	88	33	132	148	103
Upper Township	Cape May	67	78	84	106	94	86
Hammonton Town	Atlantic	61	60	54	70	89	67
Franklin Township	Gloucester	91	59	56	34	84	65
Ocean Township	Ocean	66	58	20	65	94	61
Beachwood Borough	Ocean	63	42	31	63	65	53
Waterford Township	Camden	77	32	49	52	52	52
Tabernacle Township	Burlington	49	46	28	46	15	37
Shamong Township	Burlington	35	39	19	33	51	35
Mullica Township	Atlantic	35	31	33	27	27	31
Dennis Township	Cape May	36	22	21	38	26	29
Plumsted Township	Ocean	24	22	31	17	46	28
Medford Lakes Borough	Burlington	7	26	17	31	56	27
Buena Borough	Atlantic	20	19	11	25	20	19
Berlin Township	Camden	17	15	14	16	28	18
Egg Harbor City	Atlantic	14	17	4	16	15	13
Buena Vista Township	Atlantic	8	12	3	16	22	12
Folsom Borough	Atlantic	9	11	6	7	8	8
Woodland Township	Burlington	14	5	5	7	8	8
South Toms River Borough	Ocean	5	6	3	9	15	8
Maurice River Township	Cumberland	5	13	4	8	7	7
Eagleswood Township	Ocean	6	7	5	8	7	7
Estell Manor City	Atlantic	7	5	8	7	4	6
Port Republic City	Atlantic	9	7	5	5	5	6
Weymouth Township	Atlantic	10	4	3	8	5	6
Lakehurst Borough	Ocean	9	6	5	3	3	5
New Hanover Township	Burlington	8	1	2	3	6	4
Bass River Township	Burlington	6	2	4	5	1	4
Chesilhurst Borough	Camden	3	6	0	3	4	3
Woodbine Borough	Cape May	6	1	1	2	0	2
Wrightstown Borough	Burlington	2	1	1	4	1	2
Washington Township	Burlington	3	1	1	1	0	1
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	891	523	508	316	319	511
Vineland City	Cumberland	303	196	236	85	260	216
Berlin Borough	Camden	53	11	43	54	73	47
Springfield Township	Burlington	14	7	16	19	4	12
North Hanover Township	Burlington	12	6	6	13	13	10
Corbin City	Atlantic	1	1	2	4	0	2

Table R2b

Average Selling Price of Homes

Municipality	County	2010	2011	2012	2013	2014	5-Year % Change
Bass River Township	Burlington	\$316,291	\$244,167	\$172,066	\$240,032	\$413,000	31%
Woodland Township	Burlington	\$236,435	\$213,331	\$265,159	\$315,885	\$270,000	14%
Estell Manor City	Atlantic	\$253,922	\$237,642	\$171,022	\$211,853	\$282,500	11%
Eagleswood Township	Ocean	\$249,341	\$234,319	\$249,528	\$283,081	\$255,357	2%
Folsom Borough	Atlantic	\$183,272	\$201,164	\$189,294	\$211,185	\$182,500	> -1%
Plumsted Township	Ocean	\$333,259	\$312,093	\$312,215	\$353,769	\$326,724	-2%
Maurice River Township	Cumberland	\$229,727	\$230,963	\$178,124	\$162,024	\$225,194	-2%
Evesham Township	Burlington	\$271,266	\$294,469	\$291,605	\$262,414	\$263,861	-3%
Hamilton Township	Atlantic	\$199,749	\$203,988	\$203,285	\$197,480	\$191,708	-4%
Medford Township	Burlington	\$374,185	\$380,837	\$327,728	\$385,581	\$357,473	-4%
Franklin Township	Gloucester	\$227,823	\$218,060	\$210,173	\$198,266	\$213,223	-6%
Upper Township	Cape May	\$381,875	\$362,391	\$365,184	\$319,812	\$351,563	-8%
Jackson Township	Ocean	\$348,704	\$333,901	\$320,413	\$314,112	\$319,363	-8%
Tabernacle Township	Burlington	\$330,729	\$344,039	\$336,148	\$285,159	\$302,167	-9%
Ocean Township	Ocean	\$330,980	\$319,389	\$302,442	\$280,548	\$292,864	-12%
Pemberton Township	Burlington	\$188,416	\$180,044	\$181,756	\$162,993	\$166,564	-12%
Buena Vista Township	Atlantic	\$239,050	\$236,178	\$146,761	\$242,718	\$210,936	-12%
Lacey Township	Ocean	\$302,802	\$314,442	\$319,656	\$279,438	\$264,878	-13%
Egg Harbor Township	Atlantic	\$269,646	\$255,490	\$223,583	\$233,686	\$235,709	-13%
Monroe Township	Gloucester	\$230,841	\$213,551	\$211,284	\$201,379	\$200,170	-13%
Waterford Township	Camden	\$212,840	\$211,149	\$180,602	\$168,220	\$183,521	-14%
Little Egg Harbor Township	Ocean	\$248,233	\$223,775	\$215,712	\$195,129	\$213,614	-14%
Mullica Township	Atlantic	\$242,643	\$248,055	\$206,729	\$195,024	\$208,578	-14%
Winslow Township	Camden	\$212,387	\$197,815	\$180,432	\$180,821	\$181,020	-15%
Hammonton Town	Atlantic	\$244,349	\$232,250	\$233,732	\$234,059	\$207,783	-15%
Berlin Township	Camden	\$193,383	\$182,231	\$179,762	\$177,705	\$164,403	-15%
Dennis Township	Cape May	\$283,989	\$279,778	\$227,384	\$253,938	\$239,731	-16%
Shamong Township	Burlington	\$409,698	\$339,219	\$342,002	\$378,851	\$338,591	-17%
Galloway Township	Atlantic	\$221,074	\$221,051	\$206,060	\$204,220	\$180,411	-18%
Beachwood Borough	Ocean	\$278,066	\$234,926	\$224,761	\$219,184	\$225,867	-19%
Southampton Township	Burlington	\$231,192	\$201,974	\$178,539	\$196,213	\$187,290	-19%
Lakehurst Borough	Ocean	\$211,162	\$180,144	\$248,889	\$150,740	\$170,667	-19%
Manchester Township	Ocean	\$211,994	\$212,272	\$178,549	\$135,185	\$168,280	-21%
Stafford Township	Ocean	\$327,188	\$317,458	\$278,626	\$224,541	\$256,514	-22%
South Toms River Borough	Ocean	\$205,332	\$200,368	\$146,417	\$173,255	\$157,385	-23%
Buena Borough	Atlantic	\$188,520	\$188,294	\$167,067	\$164,282	\$143,910	-24%
Barnegat Township	Ocean	\$301,939	\$257,744	\$245,771	\$241,253	\$230,210	-24%
Weymouth Township	Atlantic	\$259,094	\$243,510	\$177,179	\$250,118	\$197,100	-24%
New Hanover Township	Burlington	\$321,791	\$247,325	\$158,054	\$183,936	\$242,750	-25%
Port Republic City	Atlantic	\$275,446	\$328,513	\$334,594	\$342,200	\$205,098	-26%
Medford Lakes Borough	Burlington	\$382,154	\$301,078	\$305,772	\$277,089	\$270,231	-29%
Berkeley Township	Ocean	\$243,971	\$241,971	\$200,332	\$167,873	\$171,762	-30%
Chesilhurst Borough	Camden	\$223,430	\$165,409	-	\$128,383	\$140,000	-37%
Egg Harbor City	Atlantic	\$184,086	\$152,345	\$151,315	\$147,193	\$109,127	-41%
Wrightstown Borough	Burlington	\$231,681	\$296,790	\$149,511	\$208,325	\$83,000	-64%
Washington Township	Burlington	\$307,605	\$218,382	\$303,145	\$289,623	-	-
Woodbine Borough	Cape May	\$204,720	\$315,733	\$278,399	\$162,850	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	\$387,730	\$248,978	\$296,024	\$267,557	\$323,875	-16%
Vineland City	Cumberland	\$195,687	\$177,303	\$176,225	\$173,922	\$164,612	-16%
Berlin Borough	Camden	\$250,013	\$246,497	\$220,722	\$247,388	\$226,768	-9%
North Hanover Township	Burlington	\$349,765	\$279,073	\$342,482	\$308,892	\$287,946	-18%
Toms River Township	Ocean	\$377,448	\$390,153	\$355,868	\$277,483	\$274,870	-27%
Corbin City	Atlantic	\$258,389	\$288,370	\$332,532	\$148,648	-	-

Table R2c

2014 Pinelands Area Home Sales

Municipality	County	Inside Pinelands Area Boundary		Outside Pinelands Area Boundary	
		Number of Sales	Avg. Sales Price	Number of Sales	Avg. Sales Price
Buena Borough	Atlantic	4	\$99,875	16	\$154,919
Buena Vista Township	Atlantic	22	\$210,936	0	-
Egg Harbor City	Atlantic	15	\$109,127	-	-
Egg Harbor Township	Atlantic	172	\$226,494	107	\$250,521
Estell Manor City	Atlantic	4	\$282,500	0	-
Folsom Borough	Atlantic	8	\$182,500	-	-
Galloway Township	Atlantic	30	\$212,252	92	\$170,028
Hamilton Township	Atlantic	122	\$174,676	10	\$399,500
Hammonton Town	Atlantic	89	\$207,783	-	-
Mullica Township	Atlantic	27	\$208,578	-	-
Port Republic City	Atlantic	0	-	5	\$205,098
Weymouth Township	Atlantic	2	\$177,000	3	\$210,500
Bass River Township	Burlington	1	\$413,000	0	-
Evesham Township	Burlington	120	\$252,261	270	\$269,017
Medford Lakes Borough	Burlington	56	\$270,231	-	-
Medford Township	Burlington	189	\$370,163	26	\$265,219
New Hanover Township	Burlington	0	-	6	\$242,750
Pemberton Township	Burlington	122	\$165,487	2	\$232,250
Shamong Township	Burlington	51	\$338,591	-	-
Southampton Township	Burlington	134	\$169,576	14	\$356,843
Tabernacle Township	Burlington	15	\$302,167	-	-
Washington Township	Burlington	0	-	0	-
Woodland Township	Burlington	8	\$270,000	-	-
Wrightstown Borough	Burlington	0	-	1	\$83,000
Berlin Township	Camden	3	\$149,567	25	\$166,183
Chesilhurst Borough	Camden	4	\$140,000	-	-
Waterford Township	Camden	52	\$183,521	-	-
Winslow Township	Camden	93	\$196,856	122	\$168,949
Dennis Township	Cape May	8	\$195,625	18	\$259,333
Upper Township	Cape May	8	\$232,238	86	\$362,663
Woodbine Borough	Cape May	0	-	-	-
Maurice River Township	Cumberland	3	\$165,452	4	\$270,000
Franklin Township	Gloucester	10	\$233,252	74	\$210,517
Monroe Township	Gloucester	105	\$197,639	119	\$202,404
Barneгат Township	Ocean	99	\$239,684	86	\$219,304
Beachwood Borough	Ocean	0	-	65	\$225,867
Berkeley Township	Ocean	61	\$172,549	575	\$171,678
Eagleswood Township	Ocean	0	-	7	\$255,357
Jackson Township	Ocean	31	\$345,440	436	\$317,509
Lacey Township	Ocean	0	-	215	\$264,878
Lakehurst Borough	Ocean	3	\$170,667	0	-
Little Egg Harbor Township	Ocean	0	-	148	\$213,614
Manchester Township	Ocean	89	\$185,310	409	\$164,575
Ocean Township	Ocean	1	\$345,000	93	\$292,303
Plumsted Township	Ocean	0	-	46	\$326,724
South Toms River Borough	Ocean	9	\$157,686	6	\$156,933
Stafford Township	Ocean	61	\$226,434	47	\$295,553
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>					
Corbin City	Atlantic	0	-	0	-
North Hanover Township	Burlington	0	-	13	\$287,946
Springfield Township	Burlington	0	-	4	\$323,875
Berlin Borough	Camden	0	-	73	\$226,768
Vineland City	Cumberland	1	\$103,500	259	\$164,848
Toms River Township	Ocean	0	-	319	\$274,870

E1

Per Capita Income

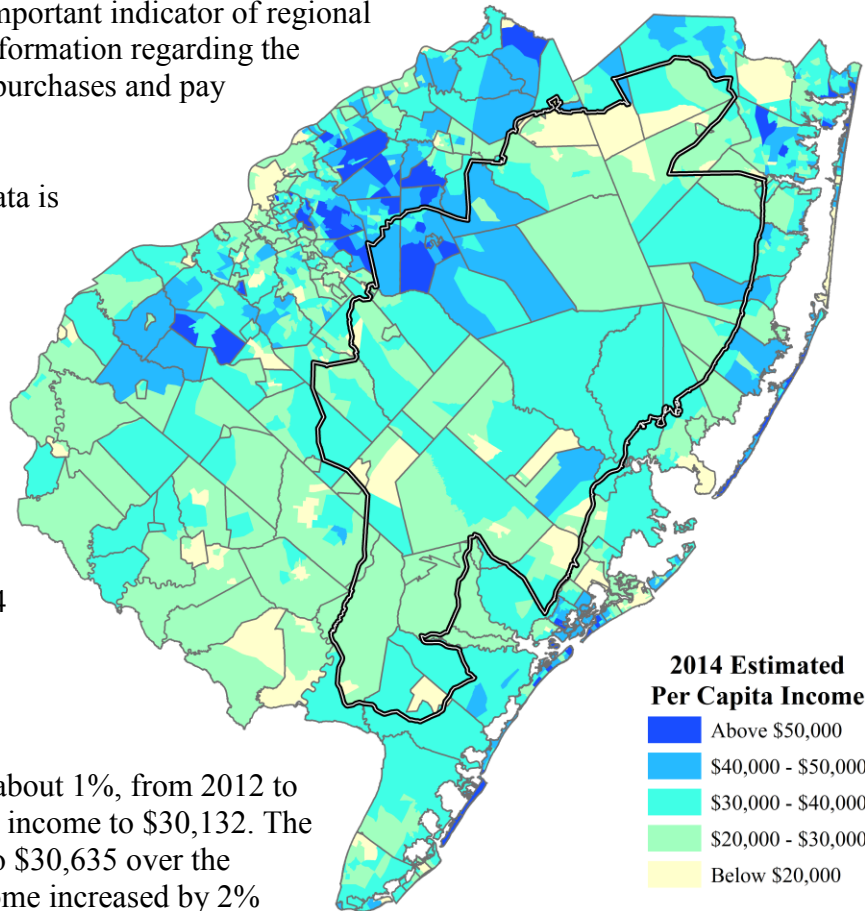
N.J. Department of Labor 1979, 1989, 1999, 2010/ESRI Data 2012 & 2014

Updated for 2015 LTEM with 2014 data

In 2014, Pinelands Area estimated per capita income decreased by 1% from 2012 to about \$30,100. The Non-Pinelands saw a decrease of 3% to \$30,600 while the state actually saw an increase of 2% to \$35,700 over the two-year period.

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 & 2014 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 2014 dollars.



2014 Estimated Per Capita Income

- Above \$50,000
- \$40,000 - \$50,000
- \$30,000 - \$40,000
- \$20,000 - \$30,000
- Below \$20,000

Findings:

Block Group Scale

The Pinelands Area saw a decrease of about 1%, from 2012 to 2014, bringing the estimated per capita income to \$30,132. The Non-Pinelands saw a decrease of 3% to \$30,635 over the same period. Statewide, per capita income increased by 2% to \$35,673, showing that northern New Jersey is emerging from the recent recession more quickly than its southern counterpart. Despite the greater decline in the Non-Pinelands, the Pinelands Area still has a lower per capita income. Estimates for 2019 show per capita income in both regions to increase by approximately 15% while the state’s is estimated to increase by about 17%.

Municipal Scale

Looking at municipal averages, the Pinelands municipalities saw a slight decrease in estimated per capita income of less than 0.1% whereas the Non-Pinelands municipalities saw a decrease of about 1.5%.

Average Municipal Per Capita Income

Region	1979	1989	1999	2010	2012 Estimate	2014 Estimate	Change 2012 - 2014	Change 1979 - 2014
Pinelands	\$20,787	\$28,084	\$30,509	\$31,700	\$30,083	\$30,080	> -1%	45%
Non-Pinelands	\$24,317	\$33,701	\$34,848	\$35,653	\$33,580	\$33,093	-1%	36%
State	\$26,501	\$35,728	\$38,375	\$37,844	\$34,979	\$35,673	2%	35%

Medford Township continued to have the greatest estimated per capita income in 2014 at \$49,226 followed closely by Medford Lakes Borough at \$47,124. Woodbine Borough, at \$18,494, took over the bottom spot from Egg Harbor City and is the only Pinelands municipality with an estimated per capita income less than \$20,000.

The greatest gains from 2010 occurred in Maurice Rive Township (up 31% to \$22,375) and New Hanover Township (up 23% to \$20,543). Bass River Township and Washington Township were the only other municipalities to show increases exceeding 10%. In all, 11 Pinelands municipalities saw increases to their estimated per capita income from 2010 (up an average of 10%). The greatest decrease from 2010 to 2014 occurred in Lakehurst Borough (down 22% to \$22,905). Overall, 36 Pinelands municipalities saw decreases in estimated per capita income, with an average decrease of 9%.

Table E1

Per Capita Income

Municipality	County	1989	1999	2010	2012 Estimate	2014 Estimate	Estimated % Change 2012 - 2014
Medford Township	Burlington	\$46,933	\$54,908	\$49,860	\$47,725	\$49,226	3%
Medford Lakes Borough	Burlington	\$42,322	\$44,593	\$52,969	\$43,520	\$47,124	8%
Shamong Township	Burlington	\$35,911	\$43,957	\$42,142	\$40,731	\$43,778	7%
Evesham Township	Burlington	\$38,156	\$41,911	\$43,329	\$39,192	\$42,644	9%
Tabernacle Township	Burlington	\$38,792	\$39,609	\$39,872	\$37,941	\$41,911	10%
Upper Township	Cape May	\$33,632	\$39,074	\$42,017	\$36,212	\$36,746	1%
Jackson Township	Ocean	\$30,749	\$34,077	\$37,478	\$35,514	\$36,422	3%
Ocean Township	Ocean	\$25,705	\$32,441	\$40,056	\$35,513	\$36,095	2%
Plumsted Township	Ocean	\$28,697	\$31,877	\$34,436	\$30,770	\$34,652	13%
Southampton Township	Burlington	\$31,856	\$38,334	\$37,448	\$33,754	\$34,557	2%
Dennis Township	Cape May	\$29,212	\$30,487	\$33,162	\$29,446	\$34,076	16%
Stafford Township	Ocean	\$27,927	\$36,089	\$34,405	\$32,649	\$33,192	2%
Lacey Township	Ocean	\$28,405	\$32,876	\$34,255	\$30,242	\$33,188	10%
Port Republic City	Atlantic	\$33,605	\$34,628	\$39,527	\$37,252	\$32,235	-13%
Franklin Township	Gloucester	\$25,793	\$28,813	\$34,894	\$29,248	\$31,682	8%
Waterford Township	Camden	\$27,883	\$30,801	\$33,865	\$28,459	\$31,603	11%
Folsom Borough	Atlantic	\$25,308	\$29,296	\$31,969	\$27,409	\$30,671	12%
Monroe Township	Gloucester	\$26,238	\$29,113	\$30,692	\$27,233	\$30,335	11%
Washington Township	Burlington	\$32,925	\$19,861	\$26,933	\$27,996	\$30,291	8%
Bass River Township	Burlington	\$24,815	\$28,963	\$26,534	\$27,978	\$30,290	8%
Woodland Township	Burlington	\$21,318	\$37,125	\$36,426	\$36,208	\$29,869	-18%
Beachwood Borough	Ocean	\$27,702	\$30,192	\$30,796	\$29,259	\$29,829	2%
Winslow Township	Camden	\$26,759	\$30,202	\$30,273	\$28,575	\$29,700	4%
Weymouth Township	Atlantic	\$25,867	\$26,980	\$31,329	\$27,085	\$28,690	6%
Egg Harbor Township	Atlantic	\$30,285	\$31,728	\$31,608	\$29,139	\$28,457	-2%
Eagleswood Township	Ocean	\$25,067	\$29,296	\$30,545	\$27,864	\$28,398	2%
Galloway Township	Atlantic	\$31,123	\$29,909	\$26,384	\$30,842	\$28,349	-8%
Barneget Township	Ocean	\$49,587	\$27,435	\$31,693	\$28,071	\$28,341	1%
Little Egg Harbor Township	Ocean	\$27,190	\$29,299	\$31,013	\$28,025	\$27,806	-1%
Berlin Township	Camden	\$25,781	\$31,513	\$28,427	\$30,046	\$27,461	-9%
Berkeley Township	Ocean	\$26,450	\$31,543	\$30,581	\$31,456	\$27,146	-14%
Estell Manor City	Atlantic	\$29,897	\$27,665	\$30,223	\$28,382	\$26,909	-5%
Manchester Township	Ocean	\$28,458	\$31,843	\$29,600	\$33,401	\$26,569	-20%
Mullica Township	Atlantic	\$26,459	\$28,084	\$28,463	\$27,441	\$26,518	-3%
Wrightstown Borough	Burlington	\$16,363	\$20,589	\$26,307	\$20,919	\$26,331	26%
Pemberton Township	Burlington	\$24,075	\$27,337	\$28,488	\$24,335	\$25,626	5%
Chesilhurst Borough	Camden	\$21,375	\$21,673	\$26,757	\$23,828	\$25,527	7%
Hammonton Town	Atlantic	\$29,859	\$28,262	\$28,368	\$26,225	\$25,020	-5%
Hamilton Township	Atlantic	\$30,447	\$30,280	\$27,459	\$27,398	\$24,542	-10%
Buena Vista Township	Atlantic	\$24,082	\$26,121	\$28,922	\$23,625	\$24,022	2%
Lakehurst Borough	Ocean	\$20,037	\$26,132	\$29,499	\$23,947	\$22,905	-4%
Maurice River Township	Cumberland	\$19,452	\$24,357	\$17,050	\$31,339	\$22,375	-29%
Buena Borough	Atlantic	\$22,763	\$23,755	\$25,018	\$23,671	\$21,730	-8%
Egg Harbor City	Atlantic	\$23,847	\$21,529	\$24,204	\$19,717	\$21,061	7%
South Toms River Borough	Ocean	\$19,149	\$23,151	\$20,820	\$21,142	\$20,816	-2%
New Hanover Township	Burlington	\$17,322	\$17,251	\$16,705	\$32,347	\$20,543	-36%
Woodbine Borough	Cape May	\$14,372	\$18,949	\$17,082	\$20,838	\$18,494	-11%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	\$35,428	\$41,666	\$41,148	\$39,533	\$41,926	6%
Toms River Township	Ocean	\$33,038	\$35,539	\$36,286	\$36,517	\$35,030	-4%
Berlin Borough	Camden	\$30,121	\$35,063	\$36,557	\$33,267	\$34,038	2%
North Hanover Township	Burlington	\$21,463	\$24,981	\$32,059	\$25,255	\$27,195	8%
Corbin City	Atlantic	\$28,853	\$30,297	\$30,775	\$26,751	\$26,859	< 1%
Vineland City	Cumberland	\$24,748	\$26,710	\$26,612	\$24,002	\$24,248	1%

E2 Unemployment

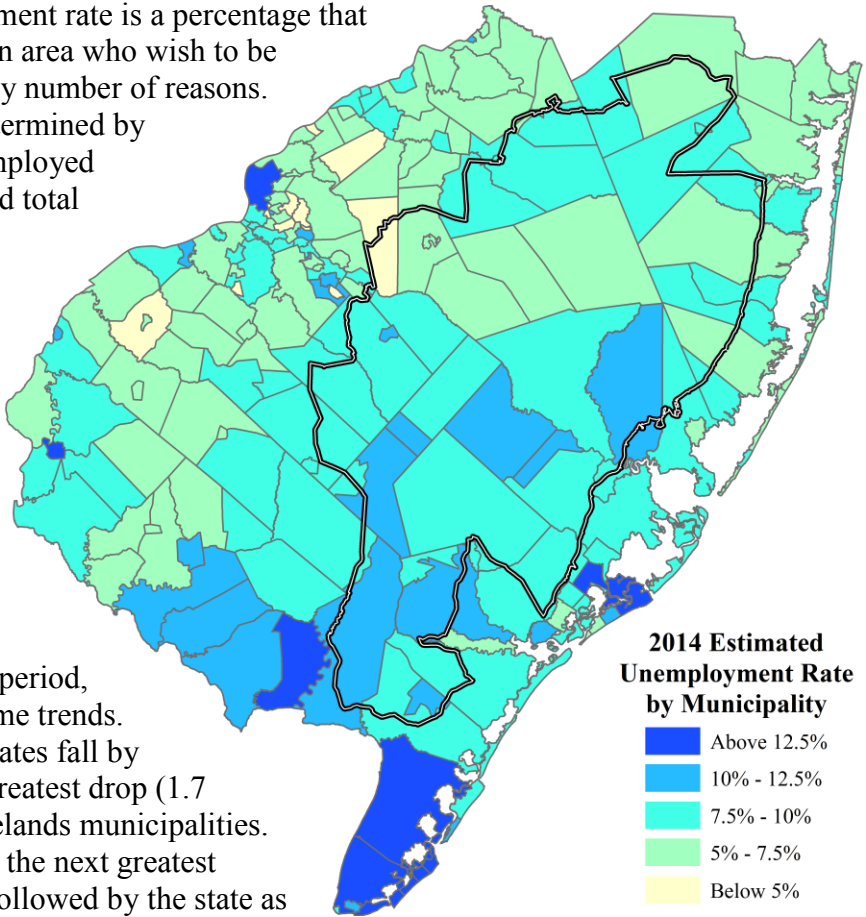
N.J. Department of Labor 1990 - 2014
Updated for 2015 LTEM with 2014 data

In 2014, all three regions saw decreases in estimated unemployment rates of more than one percentage point. The Pinelands rate fell by 1.7 points to 8.0%, while the Non-Pinelands and the state fell by 1.6 points to 7.7% and 1.5 points to 6.6%, 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.¹³

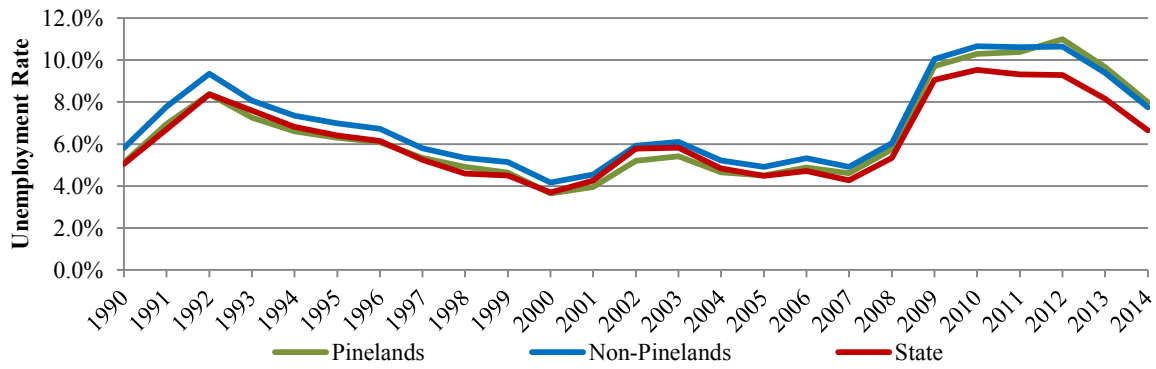
Findings: Throughout the monitoring period, all three regions follow roughly the same trends. In 2014, all three saw unemployment rates fall by more than one percentage point. The greatest drop (1.7 percentage points) occurred in the Pinelands municipalities. The Non-Pinelands municipalities saw the next greatest decline (down 1.6 percentage points) followed by the state as a whole (down 1.5 percentage points). Despite the greater decline, the estimated unemployment rates in the Pinelands municipalities were higher than the Non-Pinelands municipalities and the state (8.0%, 7.7%, and 6.6%, respectively). The Pinelands municipalities' 2014 unemployment rate was still 3.4 percentage points higher than its 2007 pre-recession rate.



Of the individual municipalities, Maurice River Township had the highest unemployment rate at 11.4% followed by Mullica Township at 11.3%. Evesham Township boasted the lowest unemployment rate of 4.9%. Every Pinelands municipality saw declines in their unemployment rates in 2014. The smallest decline was by 0.6 percentage points (Folsom Borough) and the largest was down 3.3 percentage points (Bass River Township). The average decline was 1.7 percentage points. Five-year trends are shown on Table E2.

¹³ A recent change in the way the U.S. Bureau of Labor Statistics resulted in a new unemployment estimates. Therefore, estimates may not match prior reports. Additionally, the N.J. Department of Labor notes that some years may not be comparable to others.

Estimated Unemployment Rate



Estimated Unemployment Rate – Inset (2010-2014)

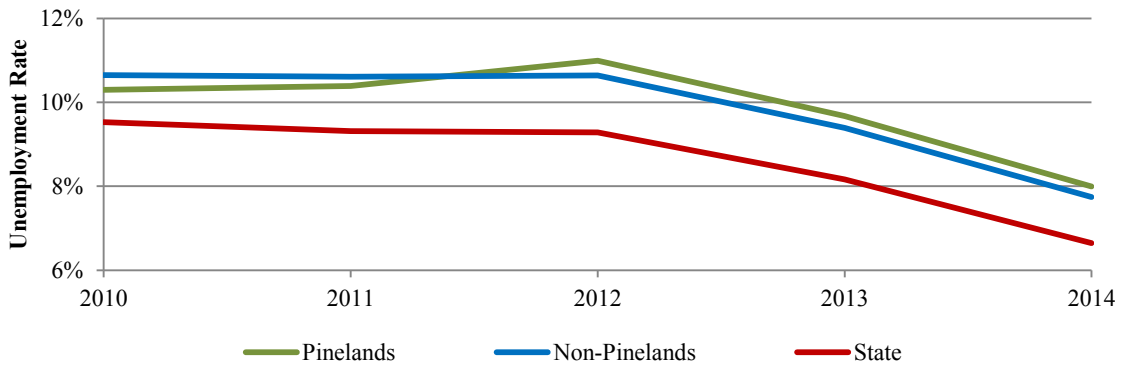


Table E2

Estimated Unemployment Rates

Municipality	County	2010	2011	2012	2013	2014	5-Year Change (% Points)
Maurice River Township	Cumberland	13.6%	11.7%	14.7%	13.4%	11.4%	-2.2%
Mullica Township	Atlantic	12.4%	15.4%	16.8%	13.5%	11.3%	-1.1%
Buena Vista Township	Atlantic	8.4%	13.0%	15.3%	12.9%	10.6%	2.2%
Egg Harbor City	Atlantic	16.5%	17.1%	13.8%	12.0%	10.6%	-5.9%
Bass River Township	Burlington	15.3%	14.7%	17.2%	13.8%	10.5%	-4.8%
Woodbine Borough	Cape May	26.9%	21.4%	13.3%	12.5%	10.5%	-16.5%
Chesilhurst Borough	Camden	16.0%	19.6%	15.1%	11.7%	10.5%	-5.5%
Folsom Borough	Atlantic	11.1%	13.0%	13.8%	10.9%	10.2%	-0.9%
Estell Manor City	Atlantic	14.7%	13.3%	14.3%	12.3%	10.1%	-4.6%
Dennis Township	Cape May	8.4%	8.5%	13.2%	11.8%	9.9%	1.5%
South Toms River Borough	Ocean	10.4%	9.2%	12.9%	11.9%	9.9%	-0.5%
New Hanover Township	Burlington	9.0%	7.6%	13.0%	12.4%	9.8%	0.7%
Egg Harbor Township	Atlantic	11.2%	11.7%	11.8%	10.7%	9.7%	-1.5%
Hamilton Township	Atlantic	10.9%	11.1%	11.8%	11.0%	9.6%	-1.3%
Buena Borough	Atlantic	13.3%	14.4%	14.3%	12.7%	9.6%	-3.7%
Galloway Township	Atlantic	10.7%	11.2%	11.5%	10.4%	9.5%	-1.3%
Lakehurst Borough	Ocean	9.4%	12.3%	12.8%	10.0%	9.2%	-0.3%
Weymouth Township	Atlantic	18.5%	16.0%	12.1%	10.1%	9.1%	-9.4%
Manchester Township	Ocean	12.4%	12.6%	12.8%	11.8%	9.1%	-3.3%
Franklin Township	Gloucester	11.7%	12.5%	12.4%	11.1%	9.0%	-2.7%
Berkeley Township	Ocean	12.0%	12.7%	13.2%	11.2%	9.0%	-3.0%
Eagleswood Township	Ocean	11.7%	9.0%	12.3%	9.8%	8.9%	-2.8%
Pemberton Township	Burlington	12.4%	11.9%	12.0%	10.5%	8.8%	-3.6%
Washington Township	Burlington	1.2%	1.7%	10.9%	10.0%	8.7%	7.5%
Waterford Township	Camden	11.4%	10.5%	11.9%	10.3%	8.7%	-2.8%
Little Egg Harbor Township	Ocean	13.0%	13.4%	13.1%	11.0%	8.6%	-4.4%
Berlin Township	Camden	10.0%	9.6%	12.7%	10.1%	8.4%	-1.5%
Ocean Township	Ocean	12.3%	13.9%	12.2%	9.9%	8.4%	-3.9%
Port Republic City	Atlantic	10.6%	10.9%	11.9%	10.1%	8.3%	-2.3%
Hammonton Town	Atlantic	12.0%	10.4%	11.0%	10.1%	8.3%	-3.7%
Winslow Township	Camden	11.7%	11.3%	11.3%	10.0%	8.1%	-3.6%
Upper Township	Cape May	10.9%	10.7%	10.9%	9.7%	8.0%	-2.9%
Barneget Township	Ocean	10.2%	9.8%	11.2%	9.9%	8.0%	-2.2%
Monroe Township	Gloucester	11.1%	10.6%	10.6%	9.7%	8.0%	-3.1%
Plumsted Township	Ocean	8.2%	8.1%	9.7%	9.2%	7.7%	-0.5%
Southampton Township	Burlington	4.1%	5.6%	11.3%	9.6%	7.7%	3.5%
Wrightstown Borough	Burlington	9.1%	8.1%	10.0%	8.2%	7.4%	-1.7%
Stafford Township	Ocean	9.9%	9.9%	10.7%	8.8%	7.1%	-2.8%
Lacey Township	Ocean	10.2%	10.3%	10.4%	9.2%	7.0%	-3.1%
Woodland Township	Burlington	5.3%	6.2%	9.5%	8.3%	6.8%	1.5%
Jackson Township	Ocean	9.4%	9.3%	9.4%	8.3%	6.7%	-2.7%
Beachwood Borough	Ocean	7.1%	6.9%	9.8%	8.3%	6.6%	-0.5%
Tabernacle Township	Burlington	7.0%	6.1%	9.0%	7.5%	5.8%	-1.2%
Shamong Township	Burlington	5.9%	7.1%	8.1%	7.4%	5.5%	-0.3%
Medford Lakes Borough	Burlington	5.1%	3.8%	7.3%	6.2%	5.2%	0.1%
Medford Township	Burlington	4.6%	4.0%	6.8%	6.0%	5.1%	0.5%
Evesham Township	Burlington	7.0%	7.1%	7.0%	6.1%	4.9%	-2.1%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Vineland City	Cumberland	12.8%	12.9%	12.9%	11.5%	9.7%	-3.1%
Corbin City	Atlantic	12.7%	13.2%	11.8%	8.6%	7.3%	-5.3%
North Hanover Township	Burlington	9.7%	11.7%	10.3%	8.0%	7.1%	-2.6%
Berlin Borough	Camden	7.6%	6.7%	9.6%	8.3%	7.0%	-0.6%
Toms River Township	Ocean	9.9%	9.9%	10.0%	9.0%	6.7%	-3.2%
Springfield Township	Burlington	9.5%	7.6%	7.6%	7.2%	6.0%	-3.5%

E3

Employment, Establishments, Wages

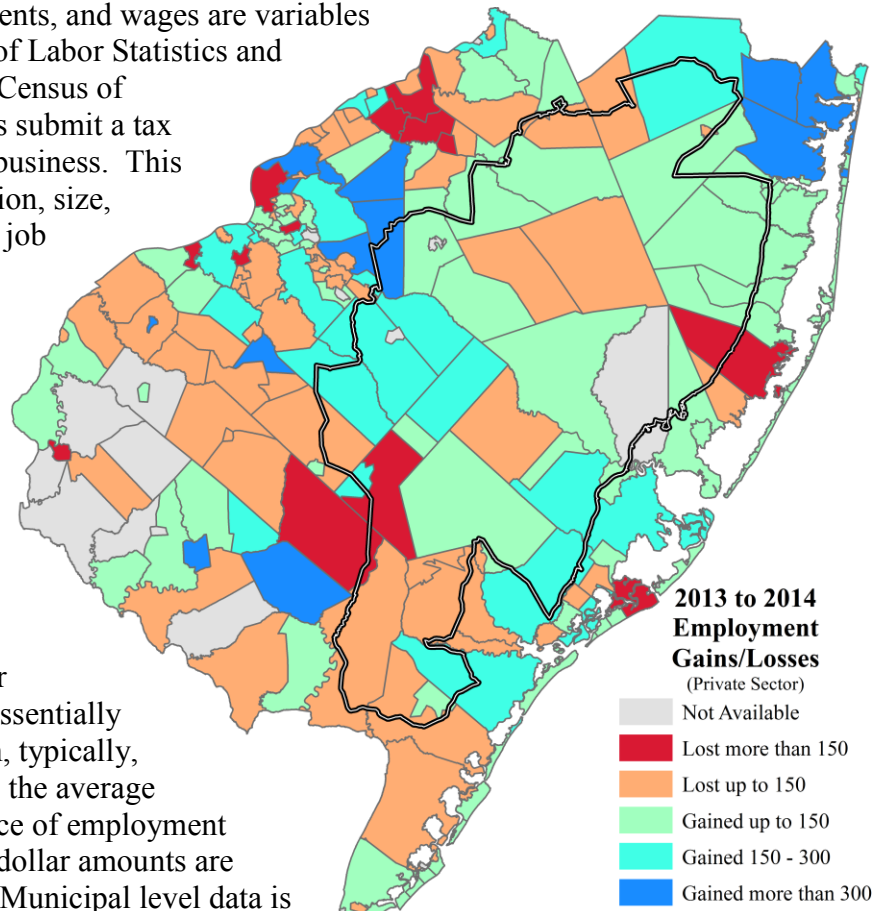
N.J. Department of Labor 2004 – 2014/ESRI Data 2014

Updated for 2015 LTEM with 2014 data

The Pinelands municipalities saw employment increase by 2.5%, bringing total employment to 143,934. This increase was greater than that seen by the Non-Pinelands and the state (each up about 1%).

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. 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 2014 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. Due to data suppression, some municipalities may not be fully represented in the narratives (see tables E3a, E3b, and E3c for more details).



Findings:

Private Sector Employment

The 2007 national recession had a significant impact on the New Jersey job market. With the recent recovery, jobs in the Pinelands municipalities are nearly back to 2007 levels, when the recession began. Employment numbers in the Pinelands municipalities in 2014 were about 99.9% of those in 2007. The Non-Pinelands municipalities were still about 4% less than 2007 levels while the state was about 2% less than 2007 levels. In 2014, the Pinelands municipalities added about 3,500 jobs; an increase of about 2.5% from 2013. For comparison, the number of employed people in the Non-Pinelands municipalities and the state increased by about 1% each.

Private Sector Employment by Municipal Aggregate

Region	2010	2011	2012	2013	2014	5 Year Change
Pinelands	135,357	135,566	137,162	140,446	143,934	6%
Non-Pinelands	585,047	583,295	589,572	595,365	599,426	2%
State	3,107,176	3,128,003	3,151,628	3,208,738	3,236,358	4%

Among the individual Pinelands municipalities, the greatest increase in employment occurred in Buena Borough (up 24%) followed by Ocean Township (up 14%). These were the only two municipalities to see gains exceeding 10%. Of the 29 municipalities that had gains in employment, the average increase was about 5%. At the bottom end, Buena Vista saw the greatest decrease (down 26%), followed by New Hanover Township (down 11%). The average decrease was by about 5% for the 15 municipalities experiencing a decrease in employment. Five-year trends are shown on Table E3a.

Private Sector Establishments

For the first time since 2008, the number of establishments in the Pinelands municipalities increased over the prior year. In 2014, 269 establishments were added to the Pinelands total. That translates to growth of about 2%. The Non-Pinelands and the state saw growth of about 1%. For comparison, the municipalities of northern New Jersey saw growth of less than half a percent.

Of the Pinelands municipalities, 25 saw increases in the number of establishments by an average of 4%. Port Republic City added two establishments for the highest growth of 17%. Ocean Township followed with a growth rate of 10% (adding 12 establishments). Egg Harbor Township and Jackson Township each added 26 establishments.

Despite the growth of the Pinelands municipalities overall, 12 municipalities saw decreases in the number of establishments, with an average decrease of 2%. South Toms River Borough saw a decline of 5% (down 3 establishments). Hamilton Township lost 13 establishments (down 3%). Seven municipalities maintained the number of establishments in 2014 from 2013. Five-year trends are shown on Table E3b.

Regional Private Sector Establishments by Municipal Aggregate

Region	2010	2011	2012	2013	2014	5 Year Change
Pinelands	13,303	13,013	12,571	12,409	12,678	-5%
Non-Pinelands	42,730	41,886	41,039	40,659	41,069	-4%
State	259,893	257,415	250,156	249,704	252,995	-3%

Average of Private Sector Average Annual Wages

Despite the upticks in employment and establishments, wages are continuing to decline across the state. In the Pinelands municipalities, average annual wages fell by about 1.5%, whereas in the Non-Pinelands and the state, the average annual wages fell by less than 1%. Relative to wages at the start of the recession in 2007, the Pinelands was down about 6% in 2014, the Non-Pinelands was down about 4% and the state was down about 4.5%.

Regional Private Sector Average of Average Annual Wages by Municipal Aggregate

Region	2010	2011	2012	2013	2014	5 Year Change
Pinelands	\$40,173	\$38,816	\$39,070	\$38,340	\$37,766	-6%
Non-Pinelands	\$39,689	\$38,916	\$38,606	\$38,679	\$38,434	-3%
Grand Total	\$48,759	\$47,934	\$47,461	\$47,994	\$47,647	-2%

Of the 18 Pinelands municipalities that showed an increase in average annual wages, Shamong saw the greatest percentage growth of 9% as well as the greatest absolute growth of about \$3,300. The next greatest percentage growth of 7% occurred in neighboring Tabernacle Township. The average rate of growth in 2014 was 3%.

Average annual wages in the remaining 26 municipalities showed decline, with an average decline of 5%. In Weymouth Township, wages declined by 23% (the most), followed by 19% in Buena Vista Township. Weymouth Township also had the second greatest absolute change of about \$9,300. Five-year trends are shown on Table E3c.

Table E3a

Private Sector Employment

Municipality	County	2010	2011	2012	2013	2014	5 Year Change
Evesham Township	Burlington	22,971	22,647	23,319	24,809	25,799	12%
Egg Harbor Township	Atlantic	10,921	11,679	11,813	11,711	11,889	9%
Jackson Township	Ocean	8,445	8,474	8,811	9,071	9,358	11%
Galloway Township	Atlantic	7,853	7,661	7,819	7,835	8,072	3%
Stafford Township	Ocean	7,230	7,304	7,403	8,027	7,827	8%
Hamilton Township	Atlantic	7,276	7,383	7,208	7,434	7,473	3%
Hammonton Town	Atlantic	7,066	7,217	7,539	7,296	7,463	6%
Medford Township	Burlington	6,244	6,148	6,278	6,478	6,535	5%
Monroe Township	Gloucester	5,432	5,397	5,518	5,542	5,722	5%
Winslow Township	Camden	4,914	4,967	5,270	5,458	5,640	15%
Lacey Township	Ocean	4,999	4,805	5,099	5,177	5,279	6%
Berlin Township	Camden	4,858	4,922	4,647	4,879	5,039	4%
Manchester Township	Ocean	3,771	3,672	3,637	3,700	3,797	1%
Berkeley Township	Ocean	3,183	3,181	3,109	3,162	3,186	< 1%
Upper Township	Cape May	2,525	2,513	2,374	2,433	2,612	3%
Egg Harbor City	Atlantic	2,566	2,524	2,521	2,536	2,540	-1%
Pemberton Township	Burlington	2,274	2,418	2,374	2,330	2,410	6%
Southampton Township	Burlington	2,075	2,156	2,194	2,343	2,345	13%
Waterford Township	Camden	1,942	1,716	1,886	1,770	1,931	-1%
Barnegat Township	Ocean	1,495	1,564	1,623	1,816	1,849	24%
Little Egg Harbor Township	Ocean	1,540	1,585	1,607	1,745	1,770	15%
Franklin Township	Gloucester	1,592	1,497	1,542	1,597	1,577	-1%
Dennis Township	Cape May	1,602	1,629	1,488	1,547	1,542	-4%
Ocean Township	Ocean	849	941	929	1,081	1,227	45%
New Hanover Township	Burlington	1,617	1,485	1,432	1,272	1,131	-30%
Buena Borough	Atlantic	712	706	715	791	979	37%
Shamong Township	Burlington	787	813	832	860	888	13%
Eagleswood Township	Ocean	788	705	728	879	827	5%
Folsom Borough	Atlantic	772	797	711	723	770	> -1%
Lakehurst Borough	Ocean	798	804	765	765	742	-7%
Plumsted Township	Ocean	665	696	721	737	735	11%
Tabernacle Township	Burlington	961	922	693	726	721	-25%
Beachwood Borough	Ocean	569	596	595	598	642	13%
Wrightstown Borough	Burlington	608	614	591	609	603	-1%
Buena Vista Township	Atlantic	1,062	964	930	777	573	-46%
Woodbine Borough	Cape May	554	516	517	529	565	2%
South Toms River Borough	Ocean	379	436	427	465	478	26%
Medford Lakes Borough	Burlington	367	436	403	-	408	11%
Woodland Township	Burlington	336	278	282	250	239	-29%
Maurice River Township	Cumberland	197	202	214	223	219	12%
Estell Manor City	Atlantic	138	133	129	134	126	-9%
Weymouth Township	Atlantic	140	126	124	126	124	-12%
Mullica Township	Atlantic	173	153	132	129	123	-29%
Chesilhurst Borough	Camden	-	95	97	-	79	-
Washington Township	Burlington	72	56	49	52	56	-22%
Port Republic City	Atlantic	43	35	70	25	27	-38%
Bass River Township	Burlington	-	-	-	-	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	31,475	31,066	31,324	31,885	32,334	3%
Vineland City	Cumberland	24,679	24,496	24,388	24,585	24,004	-3%
Berlin Borough	Camden	4,080	4,165	4,124	4,211	4,185	3%
North Hanover Township	Burlington	372	327	353	354	371	> -1%
Springfield Township	Burlington	248	253	268	287	262	6%
Corbin City	Atlantic	49	36	41	46	45	-8%

Table E3b

Private Sector Establishments

Municipality	County	2010	2011	2012	2013	2014	5 Year Change
Evesham Township	Burlington	1,493	1,435	1,389	1,393	1,415	-5%
Jackson Township	Ocean	833	907	898	884	910	9%
Egg Harbor Township	Atlantic	889	887	863	845	871	-2%
Medford Township	Burlington	831	811	769	754	748	-10%
Stafford Township	Ocean	656	638	630	640	640	-2%
Monroe Township	Gloucester	615	614	598	589	606	-1%
Winslow Township	Camden	635	622	597	592	599	-6%
Hammonton Town	Atlantic	622	620	586	567	584	-6%
Lacey Township	Ocean	563	551	537	551	564	< 1%
Hamilton Township	Atlantic	557	547	531	519	506	-9%
Galloway Township	Atlantic	552	524	502	498	498	-10%
Berlin Township	Camden	389	383	371	368	377	-3%
Berkeley Township	Ocean	392	389	368	368	367	-6%
Manchester Township	Ocean	295	294	294	301	308	4%
Barneget Township	Ocean	251	253	255	278	293	17%
Upper Township	Cape May	315	296	288	269	268	-15%
Southampton Township	Burlington	256	247	240	236	235	-8%
Franklin Township	Gloucester	239	236	224	228	227	-5%
Egg Harbor City	Atlantic	241	225	223	225	224	-7%
Little Egg Harbor Township	Ocean	223	219	212	214	223	0%
Waterford Township	Camden	352	260	234	214	217	-38%
Pemberton Township	Burlington	217	211	202	205	208	-4%
Dennis Township	Cape May	182	187	182	182	187	3%
Tabernacle Township	Burlington	164	153	148	147	143	-13%
Shamong Township	Burlington	126	125	120	122	128	2%
Ocean Township	Ocean	118	113	104	116	128	8%
Plumsted Township	Ocean	137	132	126	125	126	-8%
New Hanover Township	Burlington	127	135	137	125	121	-5%
Beachwood Borough	Ocean	112	104	102	108	113	1%
Lakehurst Borough	Ocean	98	96	91	91	95	-3%
Eagleswood Township	Ocean	84	87	87	92	94	12%
Buena Borough	Atlantic	92	99	91	88	91	-1%
Woodbine Borough	Cape May	80	76	81	78	78	-3%
Wrightstown Borough	Burlington	68	74	72	70	72	6%
Medford Lakes Borough	Burlington	69	74	65	-	72	4%
Buena Vista Township	Atlantic	100	82	74	68	67	-33%
South Toms River Borough	Ocean	58	62	59	61	58	0%
Folsom Borough	Atlantic	45	41	39	38	38	-16%
Mullica Township	Atlantic	31	32	30	30	29	-6%
Estell Manor City	Atlantic	36	34	31	28	29	-19%
Maurice River Township	Cumberland	30	28	27	27	28	-7%
Woodland Township	Burlington	65	33	27	24	24	-63%
Weymouth Township	Atlantic	27	25	23	23	23	-15%
Washington Township	Burlington	22	24	17	16	16	-27%
Chesilhurst Borough	Camden	-	13	14	-	16	-
Port Republic City	Atlantic	16	15	13	12	14	-13%
Bass River Township	Burlington	-	-	-	-	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	2,872	2,782	2,737	2,760	2,802	-2%
Vineland City	Cumberland	1,690	1,660	1,587	1,571	1,560	-8%
Berlin Borough	Camden	392	377	361	350	360	-8%
North Hanover Township	Burlington	72	59	63	70	71	-1%
Springfield Township	Burlington	58	53	44	45	41	-29%
Corbin City	Atlantic	11	11	11	12	11	0%

Table E3c

Private Sector Average Annual Wages

Municipality	County	2010	2011	2012	2013	2014	5-Year Change
Folsom Borough	Atlantic	\$75,796	\$71,446	\$73,153	\$76,674	\$75,498	> -1%
Evesham Township	Burlington	\$57,313	\$56,084	\$54,587	\$51,974	\$50,590	-12%
Eagleswood Township	Ocean	\$56,868	\$54,109	\$66,298	\$59,014	\$49,139	-14%
Egg Harbor Township	Atlantic	\$46,505	\$47,218	\$46,972	\$47,322	\$48,685	5%
Lakehurst Borough	Ocean	\$48,310	\$47,903	\$47,761	\$47,190	\$47,856	-1%
Medford Lakes Borough	Burlington	\$64,871	\$53,971	\$53,675	-	\$47,636	-27%
Washington Township	Burlington	\$50,612	\$43,652	\$52,096	\$44,869	\$47,281	-7%
Pemberton Township	Burlington	\$47,137	\$49,556	\$47,835	\$48,365	\$46,989	> -1%
Buena Borough	Atlantic	\$45,574	\$43,914	\$45,234	\$44,941	\$45,859	1%
New Hanover Township	Burlington	\$39,194	\$38,452	\$41,162	\$44,335	\$45,013	15%
Woodland Township	Burlington	\$46,848	\$43,674	\$43,273	\$45,019	\$44,955	-4%
Galloway Township	Atlantic	\$42,428	\$43,264	\$41,903	\$42,809	\$42,627	< 1%
Shamong Township	Burlington	\$40,768	\$38,509	\$37,661	\$38,543	\$41,870	3%
Lacey Township	Ocean	\$45,503	\$44,618	\$43,151	\$40,463	\$41,750	-8%
Hammonton Town	Atlantic	\$38,890	\$39,525	\$38,597	\$39,007	\$41,339	6%
Franklin Township	Gloucester	\$37,945	\$38,421	\$37,652	\$39,109	\$39,508	4%
Berlin Township	Camden	\$40,503	\$38,186	\$38,917	\$38,700	\$38,398	-5%
Woodbine Borough	Cape May	\$41,169	\$41,860	\$39,464	\$39,220	\$38,007	-8%
Medford Township	Burlington	\$40,239	\$38,954	\$38,207	\$38,067	\$37,749	-6%
Southampton Township	Burlington	\$38,873	\$38,173	\$37,364	\$37,500	\$37,679	-3%
Dennis Township	Cape May	\$37,745	\$35,121	\$36,325	\$36,127	\$37,454	-1%
Upper Township	Cape May	\$42,482	\$38,375	\$38,310	\$36,713	\$36,644	-14%
Barnegat Township	Ocean	\$33,108	\$32,510	\$36,663	\$37,080	\$36,039	9%
Monroe Township	Gloucester	\$36,152	\$37,825	\$36,009	\$34,834	\$35,445	-2%
Wrightstown Borough	Burlington	\$34,776	\$33,057	\$32,587	\$33,130	\$35,104	1%
Stafford Township	Ocean	\$35,187	\$34,918	\$35,137	\$37,908	\$34,686	-1%
South Toms River Borough	Ocean	\$39,384	\$34,373	\$33,832	\$34,016	\$34,585	-12%
Berkeley Township	Ocean	\$34,463	\$33,426	\$33,656	\$34,009	\$34,083	-1%
Manchester Township	Ocean	\$33,095	\$33,136	\$33,829	\$33,374	\$33,044	> -1%
Winslow Township	Camden	\$33,276	\$32,067	\$33,888	\$34,250	\$32,726	-2%
Tabernacle Township	Burlington	\$32,137	\$31,228	\$32,310	\$29,971	\$32,135	> -1%
Estell Manor City	Atlantic	\$39,728	\$37,395	\$36,003	\$32,427	\$31,815	-20%
Plumsted Township	Ocean	\$30,720	\$30,632	\$31,806	\$31,354	\$31,763	3%
Egg Harbor City	Atlantic	\$37,325	\$34,573	\$33,459	\$31,730	\$31,661	-15%
Ocean Township	Ocean	\$28,152	\$27,840	\$30,163	\$32,072	\$31,488	12%
Weymouth Township	Atlantic	\$44,117	\$39,473	\$46,161	\$40,640	\$31,384	-29%
Buena Vista Township	Atlantic	\$46,752	\$44,413	\$43,429	\$38,839	\$31,281	-33%
Jackson Township	Ocean	\$29,877	\$29,506	\$29,327	\$30,727	\$30,928	4%
Chesilhurst Borough	Camden	-	\$42,146	\$39,465	-	\$30,871	-
Waterford Township	Camden	\$34,790	\$34,079	\$30,343	\$31,235	\$30,119	-13%
Maurice River Township	Cumberland	\$29,451	\$28,734	\$28,916	\$29,336	\$29,109	-1%
Little Egg Harbor Township	Ocean	\$29,639	\$29,951	\$29,650	\$30,088	\$28,806	-3%
Mullica Township	Atlantic	\$30,996	\$32,124	\$27,415	\$30,733	\$28,755	-7%
Hamilton Township	Atlantic	\$30,051	\$29,807	\$29,489	\$28,621	\$28,340	-6%
Beachwood Borough	Ocean	\$37,691	\$35,032	\$34,172	\$29,236	\$26,923	-29%
Port Republic City	Atlantic	\$21,340	\$22,320	\$19,901	\$25,399	\$23,625	11%
Bass River Township	Burlington	-	-	-	-	-	-
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>							
North Hanover Township	Burlington	\$49,947	\$47,683	\$44,397	\$44,732	\$50,767	2%
Vineland City	Cumberland	\$42,836	\$41,664	\$40,620	\$40,069	\$40,119	-6%
Berlin Borough	Camden	\$39,841	\$39,306	\$39,967	\$39,942	\$39,956	< 1%
Toms River Township	Ocean	\$41,715	\$40,816	\$40,444	\$40,117	\$39,951	-4%
Springfield Township	Burlington	\$53,016	\$73,226	\$63,487	\$49,931	\$39,592	-25%
Corbin City	Atlantic	\$20,248	\$21,708	\$18,839	\$18,373	\$16,561	-18%

E4

Retail Sales, Establishments

U.S. Census Bureau 1997, 2002, 2007, 2012

Updated for 2015 LTEM with 2012 data

From 2007 to 2012, per capita retail sales growth declined less in the Non-Pinelands' economic places (down 7%) than those the Pinelands (down 10%).

Region	2002 Per Capita Sales	2007 Per Capita Sales	2012 Per Capita Sales	5-Year Change 2007 - 2012	10-Year Change 2002 - 2012
Pinelands	\$12,415	\$13,060	\$11,708	-10%	-6%
Non-Pinelands	\$16,630	\$16,959	\$15,399	-9%	-7%
State	\$15,243	\$15,927	\$15,059	-5%	-1%

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)

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 2,500 and at least 2,500 jobs.¹⁴ 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 analyzed¹⁵. 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 2012 dollars.¹⁶

Findings: Data from the recently-released 2012 Economic Census shows that the 2012 sales per capita declined more in southern New Jersey than in the north. Economic places in the Pinelands showed a decline in per capita sales by 10% from 2007. Likewise, from 2007 to 2012, the Non-Pinelands per capita sales declined by 9%, while the state's per capita sales only declined by 5%. July 2007 marks the beginning of the national recession.

At the county level, per capita sales also showed decline from 2007 to 2012. Camden County fared the best - only declining 1% - while Salem County, the only southern New Jersey county to not have land in the Pinelands Area, saw the greatest decline (15%). The next highest decline occurred in Atlantic County (down 14%). A significant change from 2007 is Cape May's overtaking of Atlantic County with the highest per capita sales in 2012. For comparison purposes, 15-year trends are shown below.

County	1997 Per Capita Sales	2002 Per Capita Sales	2007 Per Capita Sales	2012 Per Capita Sales	5-Year Change 2007 - 2012	15-Year Change 1997 - 2012
Atlantic	\$15,219	\$16,297	\$18,012	\$15,578	-14%	2%
Burlington	\$15,035	\$22,140	\$17,331	\$15,223	-12%	1%
Camden	\$13,074	\$12,056	\$12,634	\$12,562	-1%	-4%
Cape May	\$14,038	\$17,357	\$17,965	\$17,007	-5%	21%
Cumberland	\$12,448	\$13,159	\$13,996	\$12,985	-7%	4%
Gloucester	\$14,203	\$16,075	\$16,966	\$15,372	-9%	8%
Ocean	\$14,021	\$13,749	\$14,313	\$13,252	-7%	-5%
Salem	\$8,798	\$10,752	\$11,255	\$9,549	-15%	9%

¹⁴ 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.

¹⁵ 27 Pinelands municipalities were considered economic places in 2002, 32 in 2007, and 35 in 2012.

¹⁶ Dollar amounts are adjusted for inflation to 2012 dollars due to 2012 being the latest year of available data.

The national recession also impacted the number of county retail establishments. All eight southern counties saw declines in the number retail establishments, with Salem County seeing the largest decline of 11%. Burlington and Cape May counties each saw the next highest declines of 10% while Gloucester County fared the best, only declining by 4%.

County	1997 Establishments	2002 Establishments	2007 Establishments	2012 Establishments	5-Year Change 2007 - 2012	15-Year Change 1997 - 2012
Atlantic	1,258	1,182	1,291	1,227	-5%	-2%
Burlington	1,570	1,555	1,594	1,428	-10%	-9%
Camden	2,052	1,959	1,911	1,730	-9%	-16%
Cape May	784	772	746	669	-10%	-15%
Cumberland	578	553	564	512	-9%	-11%
Gloucester	989	965	989	954	-4%	-4%
Ocean	1,923	1,978	1,984	1,869	-6%	-3%
Salem	226	216	197	176	-11%	-22%

E5

Assessed Farmland Acreage

N.J. Department of the Treasury, Division of Taxation 2009 – 2014

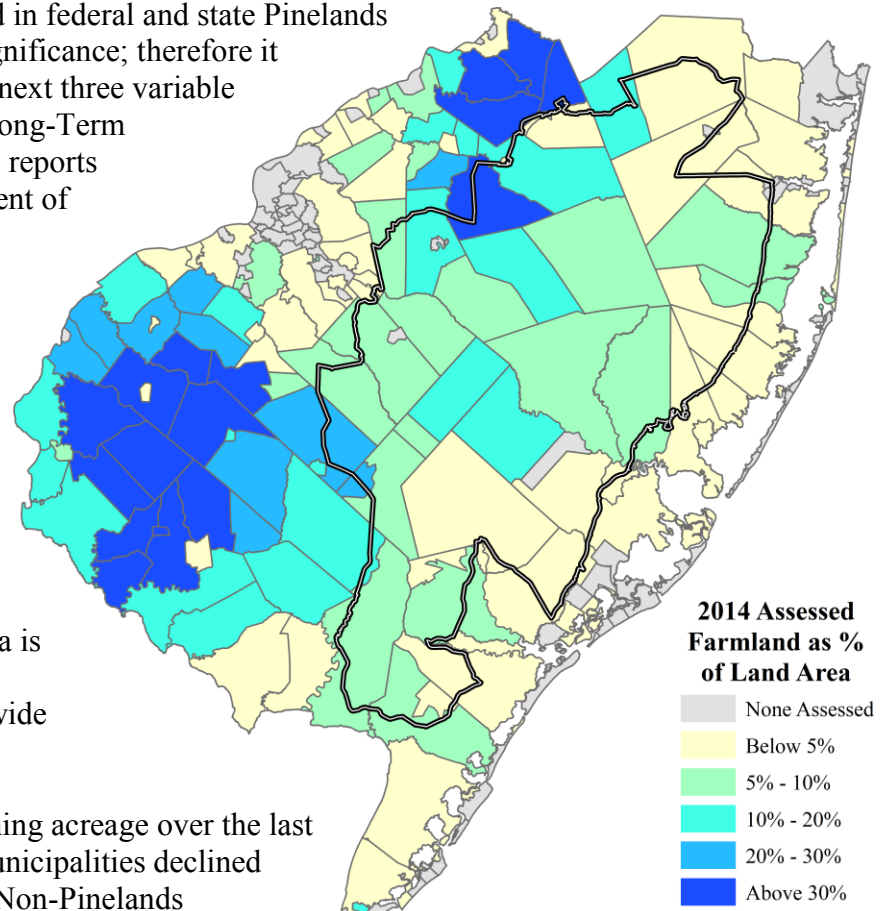
Updated for 2015 LTEM with 2014 data

The Pinelands municipalities saw a decline in farming acreage in 2014. Acres fell by 2% in the Pinelands municipalities to a total of 170,196. Farming acreage in the Non-Pinelands municipalities increased by 1%.

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: Despite the stability in farming acreage over the last few years, acreage in the Pinelands municipalities declined slightly in 2014 while acreages in the Non-Pinelands municipalities and the state remained relatively stable. As of 2014, the number of farming acres in the Pinelands municipalities sits at 170,196 acres, which is down 2% from 2013. The Non-Pinelands municipalities saw an increase of 1% while the state's overall acreage fell by a little more than half a percent from 2013 acreages. Five-year trends are shown on Table E5.



Index of Assessed Farmland Acreage by Year

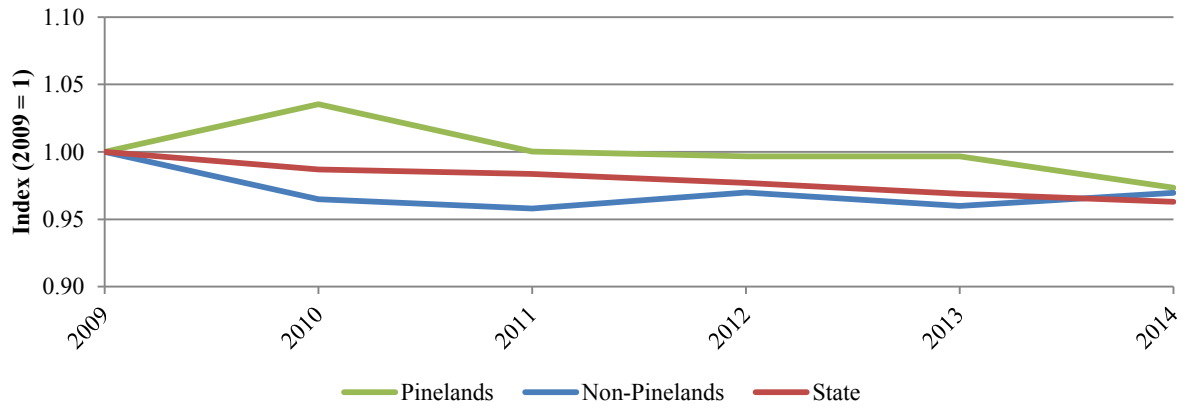


Table E5

Farmland Assessed Acreage

County	Municipality	2010	2011	2012	2013	2014	5-Year Change	5-Year % Change
Southampton Township	Burlington	11,989	12,257	12,654	12,492	14,621	2,632	22%
Franklin Township	Gloucester	13,346	13,184	8,676	12,826	13,080	-266	-2%
Maurice River Township	Cumberland	9,276	9,347	9,736	9,550	9,955	679	7%
Tabernacle Township	Burlington	9,422	9,836	9,544	9,663	9,473	51	1%
Pemberton Township	Burlington	9,003	10,593	9,833	10,652	9,254	251	3%
Washington Township	Burlington	8,192	8,211	8,446	8,153	8,552	360	4%
Woodland Township	Burlington	15,076	11,708	11,371	8,410	7,121	-7,955	-53%
Bass River Township	Burlington	6,845	6,949	6,878	6,959	6,909	64	1%
Hammonton Town	Atlantic	6,823	6,556	6,609	6,505	6,600	-223	-3%
Lacey Township	Ocean	6,266	231	6,295	6,320	6,304	38	1%
Mullica Township	Atlantic	6,419	6,429	6,416	6,221	6,175	-244	-4%
Hamilton Township	Atlantic	6,243	6,379	6,368	6,331	5,972	-271	-4%
Medford Township	Burlington	6,303	5,974	5,831	5,715	5,604	-699	-11%
Winslow Township	Camden	6,952	6,452	6,776	6,853	5,446	-1,506	-22%
Plumsted Township	Ocean	4,994	4,815	5,063	5,020	5,041	47	1%
Monroe Township	Gloucester	5,979	6,107	5,348	4,845	5,014	-965	-16%
Shamong Township	Burlington	4,583	4,656	4,456	4,696	4,692	109	2%
Estell Manor City	Atlantic	7,178	9,524	9,647	9,700	4,642	-2,536	-35%
Buena Vista Township	Atlantic	3,910	4,041	3,641	4,098	4,225	315	8%
Dennis Township	Cape May	3,870	3,848	3,834	4,244	4,084	214	6%
Manchester Township	Ocean	3,692	3,820	3,781	3,844	3,835	143	4%
Jackson Township	Ocean	4,284	4,432	4,259	4,124	3,771	-513	-12%
Galloway Township	Atlantic	2,782	2,004	2,400	539	2,521	-261	-9%
Upper Township	Cape May	2,170	2,341	2,311	2,283	2,417	247	11%
Buena Borough	Atlantic	2,254	2,339	2,305	2,308	2,294	40	2%
Waterford Township	Camden	2,491	2,581	2,565	2,541	2,253	-238	-10%
Evesham Township	Burlington	2,591	2,343	1,354	1,326	2,240	-351	-14%
Egg Harbor Township	Atlantic	2,543	2,484	2,118	2,417	2,235	-308	-12%
Ocean Township	Ocean	1,848	1,946	1,892	1,915	1,915	67	4%
New Hanover Township	Burlington	814	602	892	932	956	142	17%
Folsom Borough	Atlantic	679	703	721	674	662	-17	-3%
Little Egg Harbor Township	Ocean	537	543	543	543	538	1	> 1%
Stafford Township	Ocean	450	450	450	465	461	11	2%
Eagleswood Township	Ocean	270	270	287	258	359	89	33%
Woodbine Borough	Cape May	309	317	331	319	318	9	3%
Barneget Township	Ocean	192	191	192	220	229	37	19%
Berlin Township	Camden	173	173	157	50	157	-16	-9%
Port Republic City	Atlantic	148	148	147	136	136	-12	-8%
Berkeley Township	Ocean	88	88	88	88	88	0	0%
Wrightstown Borough	Burlington	24	24	24	24	24	0	0%
Weymouth Township	Atlantic	6	9	15	15	23	17	283%
Egg Harbor City	Atlantic	0	0	0	0	0	0	0%
Medford Lakes Borough	Burlington	0	0	0	0	0	0	0%
Chesilhurst Borough	Camden	0	0	0	0	0	0	0%
Beachwood Borough	Ocean	0	0	0	0	0	0	0%
Lakehurst Borough	Ocean	0	0	0	0	0	0	0%
South Toms River Borough	Ocean	0	0	0	0	0	0	0%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>								
Springfield Township	Burlington	11,679	11,662	11,778	11,735	12,105	426	4%
Vineland City	Cumberland	9,207	9,033	8,727	9,296	9,545	338	4%
North Hanover Township	Burlington	7,076	6,913	7,234	7,181	7,034	-42	-1%
Toms River Township	Ocean	250	284	297	307	320	70	28%
Corbin City	Atlantic	203	184	161	178	177	-26	-13%
Berlin Borough	Camden	93	93	93	93	64	-29	-31%

E6

Cranberry & Blueberry Production

U.S.D.A. National Ag. Statistics Service/N.J. Ag. Statistics Service 1980 - 2014

Updated for 2015 LTEM with 2014 data

Cranberry prices continued to fall in 2014; prices declined 1¢ to 37¢ per pound (down 3%). Blueberry prices saw a slight rebound in prices as they increased 17% from \$1.20 per pound to \$1.40 per pound.

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.

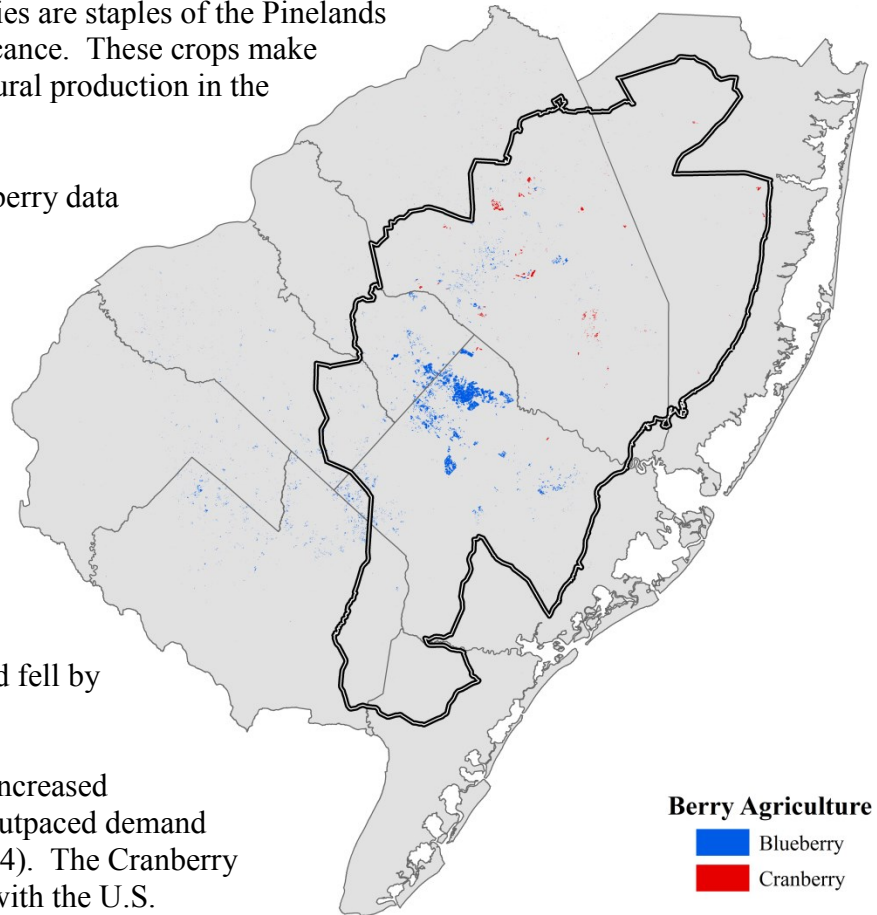
Unit of Analysis: Cranberry and blueberry data is only available at the state level. However, because these two staples are found almost exclusively in the Pinelands, statewide figures provide sufficient information for the purposes of this analysis. Unless otherwise noted, the dollar amounts below are adjusted for inflation to 2014 dollars.

Findings: In 2014, utilized production of cranberries increased by 13% while prices fell slightly. The price per pound fell by 3% from 38¢ to 37¢.

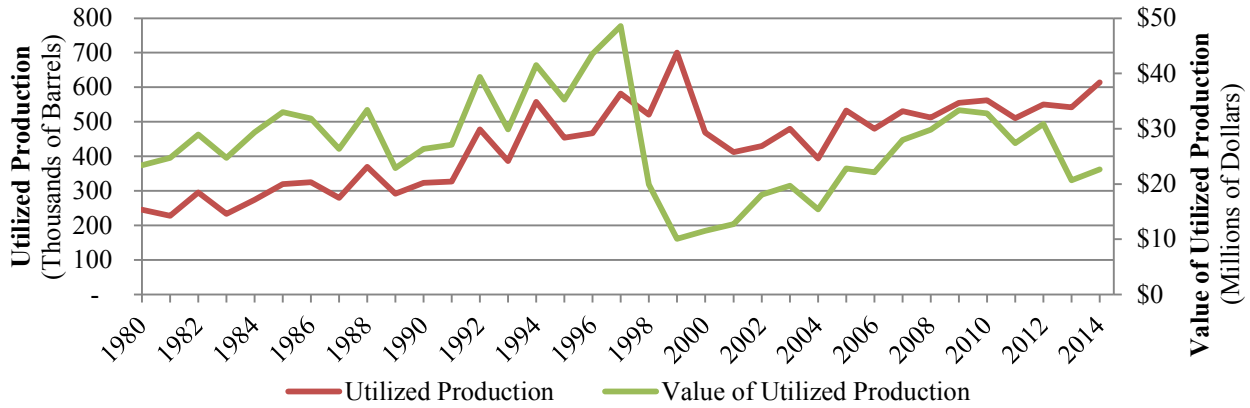
The drop in price can be attributed to increased worldwide cranberry production that outpaced demand (Cranberry Marketing Committee, 2014). The Cranberry Marketing Committee in conjunction with the U.S. Department of Agriculture briefly considered implementing volume control authority for the 2014 - 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). The oversupply continued into 2014 and prices suffered across the United States (Jenkins, 2015).

In New Jersey, utilized production of blueberries increased by about 16% in 2014. The increase in production was coupled with a 17% increase in blueberry prices from \$1.20 per pound in 2013 to \$1.40 per pound in 2014. This amounted to a 35% increase in the 2014 value of blueberry utilized production to about \$78 million over the previous year.

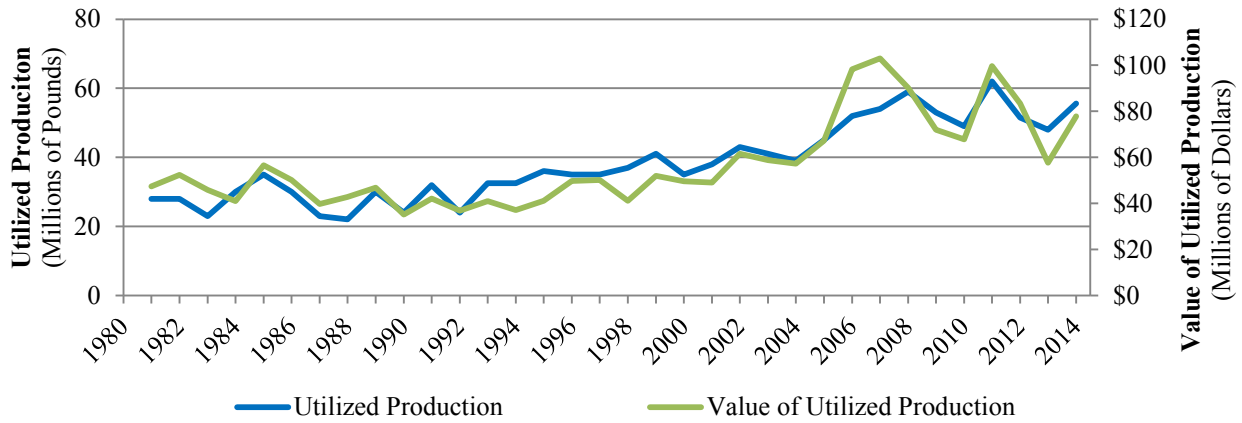
New Jersey blueberry production figures were among the top in the country for quite some time until they faced mounting pressures from growers in the south and Pacific Northwest. Due to growing seasons that coincide with that of New Jersey's (Naturipe, 2014), New Jersey blueberry prices are lower now than their high in 2007 as a result of increased supply from the two regions.



New Jersey Cranberry Production, Value and Volume



New Jersey Blueberry Production, Value and Volume



Cranberry and Blueberry Prices

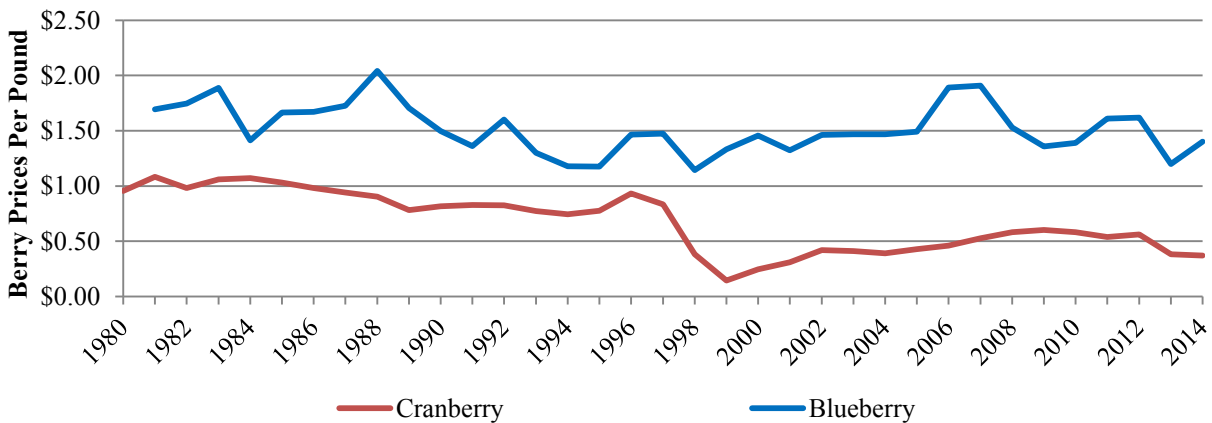


Table E6

Sales of New Jersey Cranberries and Blueberries

Year	Cranberry		Blueberry	
	Value of Production	Annual % Change	Value of Production	Annual % Change
1980	\$23,369,061	-	-	-
1981	\$24,702,321	6%	\$47,401,891	-
1982	\$28,948,029	17%	\$52,400,839	11%
1983	\$24,700,407	-15%	\$45,778,467	-13%
1984	\$29,342,504	19%	\$40,967,404	-11%
1985	\$33,019,832	13%	\$56,517,420	38%
1986	\$31,870,800	-3%	\$50,146,560	-11%
1987	\$26,316,041	-17%	\$39,705,379	-21%
1988	\$33,393,184	27%	\$42,724,544	8%
1989	\$22,856,479	-32%	\$46,889,001	10%
1990	\$26,327,144	15%	\$35,211,537	-25%
1991	\$27,111,660	3%	\$42,124,060	20%
1992	\$39,359,258	45%	\$36,818,101	-13%
1993	\$29,848,396	-24%	\$40,965,977	11%
1994	\$41,537,424	39%	\$37,067,874	-10%
1995	\$35,261,858	-15%	\$41,164,724	11%
1996	\$43,546,448	23%	\$49,806,599	21%
1997	\$48,587,667	12%	\$50,120,182	1%
1998	\$19,900,348	-59%	\$41,189,159	-18%
1999	\$10,046,360	-50%	\$51,993,819	26%
2000	\$11,541,224	15%	\$49,629,324	-5%
2001	\$12,721,719	10%	\$49,098,325	-1%
2002	\$18,050,627	42%	\$61,572,415	25%
2003	\$19,700,552	9%	\$58,785,151	-5%
2004	\$15,406,012	-22%	\$57,185,091	-3%
2005	\$22,806,901	48%	\$67,238,842	18%
2006	\$22,095,360	-3%	\$98,311,200	46%
2007	\$27,949,284	26%	\$103,032,944	5%
2008	\$29,837,337	7%	\$90,151,947	-13%
2009	\$33,377,881	12%	\$72,012,713	-20%
2010	\$32,764,316	-2%	\$67,864,986	-6%
2011	\$27,374,103	-16%	\$99,666,573	47%
2012	\$30,850,724	13%	\$83,318,608	-16%
2013	\$20,665,888	-33%	\$57,721,403	-31%
2014	\$22,657,000	10%	\$77,793,000	35%



Census of Agriculture

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

Last 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 2012.¹⁷

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. Overall, the state 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 farm operations, possibly due to development or even an increase in the amount of consolidated farming.

In 2012, agricultural sales in the Pinelands counties 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 net cash income in the Pinelands counties 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 of 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).

¹⁷ 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 – 2014

Updated for 2015 LTEM with 2014 data (includes block-level data new to the 2015 LTEM)

While average residential property tax bills increased across the state, the Pinelands municipalities saw the smallest increase: less than half a percent. The Non-Pinelands saw bills increase by 1% while the state as a whole saw an increase of half a percent.

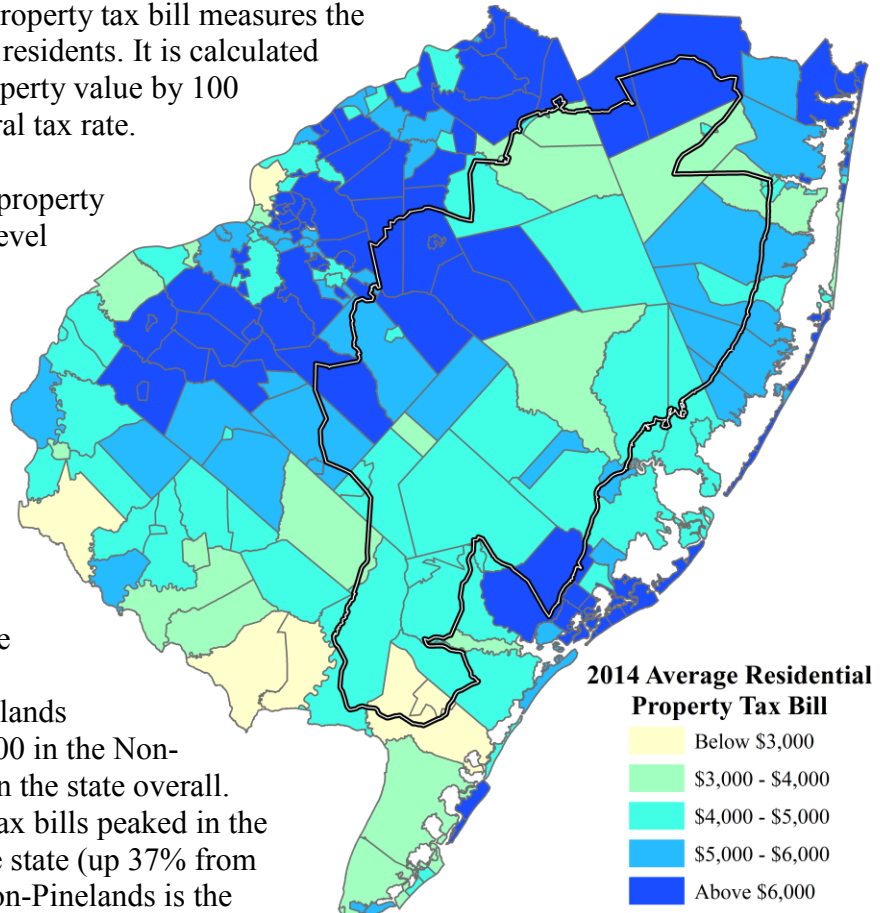
Description: The average residential property tax bill measures the impact of property taxes on municipal residents. It is calculated by dividing the average residential property value by 100 and multiplying the result by the general tax rate.

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 2014 dollars.

Findings:

Regional-level data:

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 \$3,900, \$4,200 in the Non-Pinelands municipalities, and \$6,000 in the state overall. In 2010, average residential property tax bills peaked in the Pinelands (up 34% from 1998) and the state (up 37% from 1998). The 2014 average bill in the Non-Pinelands is the current peak (up 43% from 1998).



In 2014, the average municipal tax bill in the Pinelands municipalities was \$5,144 (up less than half of one percent from 2013). In the Non-Pinelands municipalities, the average municipal tax bill was \$6,057 (up 1% from 2013). The average residential tax bill for the state in 2014 was \$8,161 (up half of one percent from 2013).

Sub-municipal data¹⁸:

New to the Annual Report is the ability to estimate average tax bills at a sub-municipal level. This allows reporting for what is happening inside the Pinelands Area as opposed to just Pinelands municipalities (which includes areas outside the boundary). Estimates show that the actual 2014 average residential tax

¹⁸ The method for calculating an average tax rate for the Pinelands Area varies from that for calculating the rate for the Pinelands municipalities (as described under *Unit of Analysis*, above). First, tax blocks are determined to be either in the Pinelands Area or outside of the Area. Note that tax blocks do not always follow the Pinelands Area boundary so there is the potential for a small number of parcels to be misclassified. Next, tax bills are calculated for each lot that is classified as residential or as a farm home by applying the general tax rate to the parcel's net value. These estimated bills are then averaged depending on whether they are in the Pinelands Area block or not. Due to the very time consuming nature of this process, only one year could be calculated for this Annual Report.

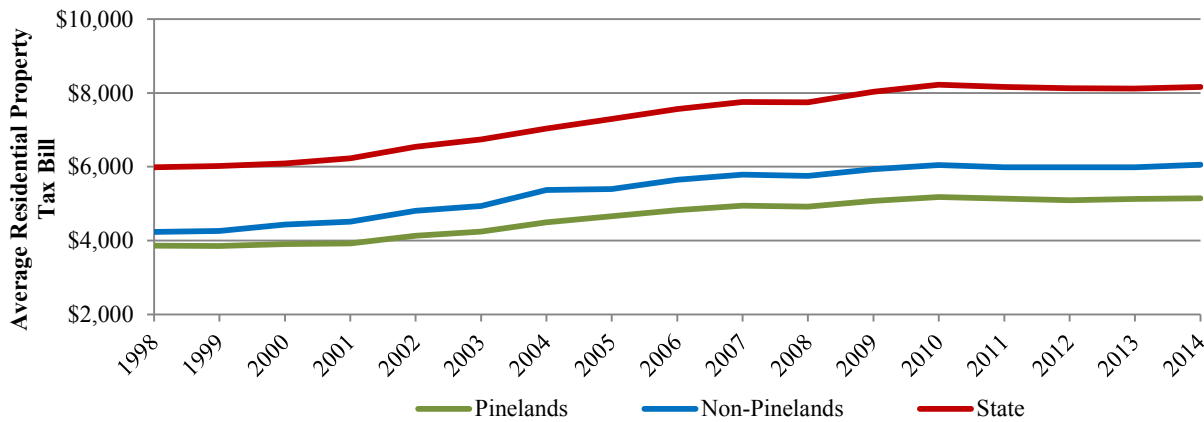
bill inside the Pinelands Area was \$5,585. Estimates suggest that the actual 2014 average tax bill for all areas in southern New Jersey outside the Pinelands Area boundary is \$5,722. This improvement in data suggests that while the municipally-based data is accurate in showing that average tax bills inside the Pinelands Area are lower than those outside, the difference is not as great as previously thought.

Individual Municipalities:

Medford Township continued to have the highest average tax bill in 2014 at \$9,729 as well as the greatest absolute increase from 2013 (up \$152). Buena Vista Township saw the greatest percentage increase of 3%. Twenty seven municipalities saw increases in their average tax bills by an average of 1%.

Conversely, Woodbine Borough continued to have the lowest average tax bill in 2014 at \$1,673. The greatest percent decrease occurred in New Hanover Township (down 4% from 2013). Twenty municipalities saw their average tax bills decrease by an average of 1% from 2013.

Average Residential Property Tax Bill



Index of Average Residential Property Tax Bill

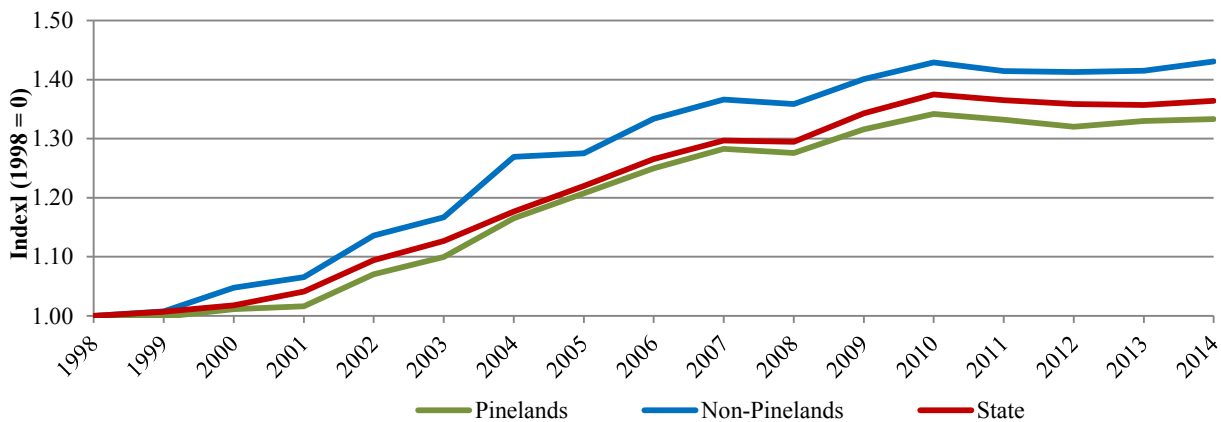


Table F1

Average Residential Property Tax Bill¹⁹

Municipality	County	2013 Average Tax Bill	2014 Average Tax Bill	Actual Change 2013 - 2014	Percent Change 2013 - 2014	2013 South N.J. Rank
Medford Township	Burlington	\$9,577	\$9,729	\$152	2%	9
Medford Lakes Borough	Burlington	\$8,378	\$8,373	-\$5	< 1%	18
Shamong Township	Burlington	\$7,615	\$7,723	\$108	1%	25
Evesham Township	Burlington	\$6,871	\$6,823	-\$48	-1%	48
Jackson Township	Ocean	\$6,754	\$6,805	\$50	1%	51
Tabernacle Township	Burlington	\$6,750	\$6,802	\$52	1%	52
Monroe Township	Gloucester	\$6,619	\$6,610	-\$10	< 1%	56
Waterford Township	Camden	\$6,414	\$6,401	-\$13	< 1%	63
Plumsted Township	Ocean	\$5,997	\$6,126	\$129	2%	76
Egg Harbor Township	Atlantic	\$5,947	\$6,044	\$97	2%	77
Berlin Township	Camden	\$5,869	\$5,919	\$50	1%	81
Egg Harbor City	Atlantic	\$5,975	\$5,893	-\$82	-1%	83
Barneget Township	Ocean	\$5,842	\$5,886	\$44	1%	84
Port Republic City	Atlantic	\$5,530	\$5,642	\$111	2%	90
Eagleswood Township	Ocean	\$5,537	\$5,639	\$102	2%	92
Winslow Township	Camden	\$5,586	\$5,547	-\$39	-1%	94
Stafford Township	Ocean	\$5,419	\$5,518	\$99	2%	95
Franklin Township	Gloucester	\$5,450	\$5,479	\$29	1%	100
Lacey Township	Ocean	\$5,232	\$5,332	\$99	2%	109
Hammonton Town	Atlantic	\$5,056	\$5,070	\$14	> -1	119
Buena Vista Township	Atlantic	\$4,872	\$4,999	\$127	3%	122
Chesilhurst Borough	Camden	\$5,044	\$4,973	-\$71	-1%	126
Southampton Township	Burlington	\$4,892	\$4,932	\$40	1%	128
Galloway Township	Atlantic	\$4,909	\$4,923	\$14	> -1	129
Ocean Township	Ocean	\$4,801	\$4,839	\$37	1%	134
Mullica Township	Atlantic	\$4,828	\$4,821	-\$7	< 1%	135
Buena Borough	Atlantic	\$4,962	\$4,799	-\$163	-3%	138
Woodland Township	Burlington	\$4,632	\$4,696	\$64	1%	142
Hamilton Township	Atlantic	\$4,752	\$4,664	-\$88	-2%	145
Lakehurst Borough	Ocean	\$4,784	\$4,634	-\$150	-3%	148
Upper Township	Cape May	\$4,584	\$4,600	\$16	> -1	150
Beachwood Borough	Ocean	\$4,629	\$4,568	-\$61	-1%	153
Little Egg Harbor Township	Ocean	\$4,540	\$4,518	-\$21	< 1%	154
Bass River Township	Burlington	\$4,527	\$4,512	-\$15	< 1%	155
Weymouth Township	Atlantic	\$4,388	\$4,400	\$12	> -1	159
South Toms River Borough	Ocean	\$4,370	\$4,373	\$3	> -1	160
Maurice River Township	Cumberland	\$4,227	\$4,271	\$44	1%	165
Wrightstown Borough	Burlington	\$4,058	\$4,149	\$92	2%	171
Estell Manor City	Atlantic	\$4,135	\$4,121	-\$15	< 1%	172
Berkeley Township	Ocean	\$3,850	\$3,880	\$30	1%	179
Manchester Township	Ocean	\$3,731	\$3,813	\$82	2%	181
New Hanover Township	Burlington	\$3,854	\$3,709	-\$145	-4%	186
Folsom Borough	Atlantic	\$3,725	\$3,667	-\$58	-2%	187
Washington Township	Burlington	\$3,522	\$3,543	\$20	1%	190
Pemberton Township	Burlington	\$3,479	\$3,436	-\$43	-1%	192
Dennis Township	Cape May	\$2,934	\$2,905	-\$28	-1%	196
Woodbine Borough	Cape May	\$1,714	\$1,673	-\$42	-2%	201
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Springfield Township	Burlington	\$7,544	\$7,435	-\$109	-1%	31
Berlin Borough	Camden	\$6,842	\$6,883	\$41	1%	45
North Hanover Township	Burlington	\$6,032	\$6,198	\$166	3%	71
Toms River Township	Ocean	\$4,704	\$5,298	\$594	13%	112
Vineland City	Cumberland	\$3,679	\$3,732	\$54	1%	185
Corbin City	Atlantic	\$3,535	\$3,385	-\$150	-4%	193

¹⁹ Rankings are out of the 202 municipalities in southern New Jersey; Rankings are ordered in descending order from highest 2014 average residential property tax bill (1) to lowest 2014 average residential property tax bill (202).

F2

State Equalized Valuation

N.J. Department of Community Affairs, Div. LGS 1998 – 2014

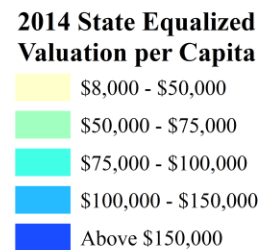
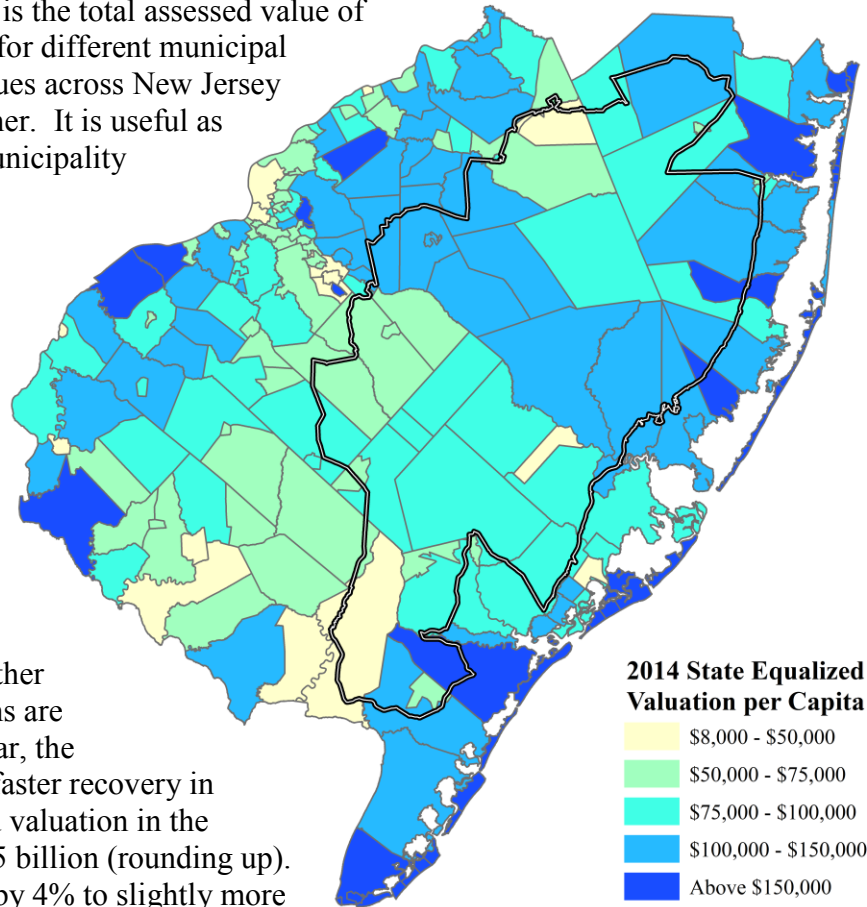
Updated for 2015 LTEM with 2014 data

The state equalized valuation continued a seven year decline. The average valuations in the Pinelands declined by 3%, while the Non-Pinelands declined by about 4%. The state's valuation only declined by 1%.

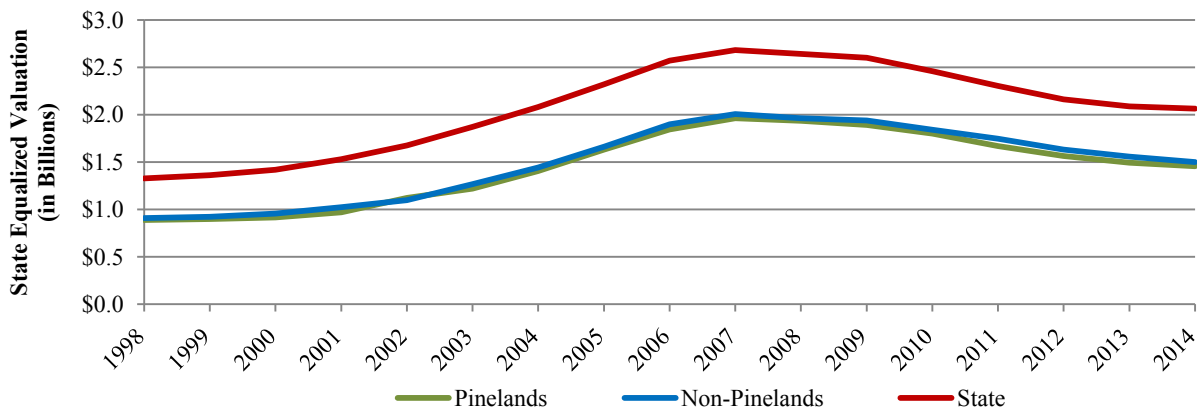
Description: Equalized property value is the total assessed value of all property in a municipality adjusted for different municipal assessment biases in order to make values across New Jersey municipalities comparable to one another. It is useful as a measurement of the wealth of one municipality relative 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 2014 dollars.

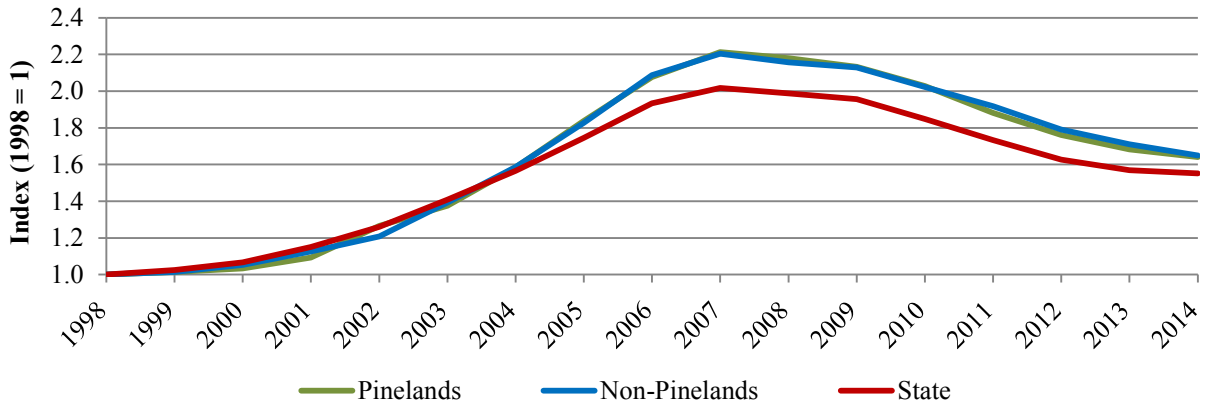
Findings: Trends in state equalized valuation have largely mirrored each other from region-to-region. While all regions are showing smaller decreases than last year, the northern half of the state is showing a faster recovery in valuations. The average state equalized valuation in the Pinelands declined by 3% to about \$1.5 billion (rounding up). In the Non-Pinelands, the average fell by 4% to slightly more than \$1.5 billion and the state as a whole only fell 1% to about \$2.1 billion. For comparison, the northern half of the state only declined 0.3%.



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 \$6.5 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 \$35 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 the highest at just over \$14 billion in 2014.

Despite the Pinelands’ overall decline in valuation, ten of the 53 municipalities with any amount of land in the Pinelands Area showed an increase in state equalized valuation in 2014 – all with at least 10% of their land in the Pinelands Area (as opposed to two in 2013). New Hanover Township and Chesilhurst Borough posted the largest gains of 14% and 6%, respectively. The average increase was about 3%. Of the other 43 municipalities with any land in the Pinelands Area, the average decrease was also about 3%

Table F2

State Equalized Valuation

Municipality	County	2014 Population Estimate	2014 State Equalized Valuation	2014 Equalized Valuation per Capita
Jackson Township	Ocean	56,449	\$6,543,417,283	\$115,917
Evesham Township	Burlington	45,613	\$5,108,864,437	\$112,005
Berkeley Township	Ocean	41,950	\$5,089,942,825	\$121,334
Egg Harbor Township	Atlantic	43,851	\$4,161,256,615	\$94,895
Stafford Township	Ocean	26,809	\$3,928,491,580	\$146,536
Lacey Township	Ocean	28,211	\$3,787,626,043	\$134,261
Manchester Township	Ocean	43,555	\$3,611,001,108	\$82,907
Medford Township	Burlington	23,357	\$3,123,643,144	\$133,735
Galloway Township	Atlantic	37,583	\$2,997,581,592	\$79,759
Winslow Township	Camden	38,895	\$2,639,885,407	\$67,872
Monroe Township	Gloucester	37,379	\$2,516,655,477	\$67,328
Little Egg Harbor Township	Ocean	20,396	\$2,364,981,874	\$115,953
Hamilton Township	Atlantic	26,647	\$2,299,088,378	\$86,279
Barneгат Township	Ocean	22,303	\$2,210,886,977	\$99,130
Upper Township	Cape May	12,113	\$1,929,667,952	\$159,306
Pemberton Township	Burlington	27,822	\$1,457,960,908	\$52,403
Ocean Township	Ocean	8,658	\$1,321,487,905	\$152,632
Hammonton Town	Atlantic	14,765	\$1,317,766,287	\$89,249
Franklin Township	Gloucester	16,702	\$1,293,652,619	\$77,455
Southampton Township	Burlington	10,362	\$1,077,800,940	\$104,015
Beachwood Borough	Ocean	11,253	\$873,101,736	\$77,588
Dennis Township	Cape May	6,319	\$872,574,298	\$138,087
Plumsted Township	Ocean	8,584	\$831,979,687	\$96,922
Waterford Township	Camden	10,732	\$764,066,178	\$71,195
Shamong Township	Burlington	6,432	\$710,333,219	\$110,437
Tabernacle Township	Burlington	6,954	\$708,433,983	\$101,874
Buena Vista Township	Atlantic	7,586	\$606,304,460	\$79,924
Berlin Township	Camden	5,362	\$560,262,828	\$104,488
Mullica Township	Atlantic	6,155	\$475,746,559	\$77,294
Medford Lakes Borough	Burlington	4,110	\$456,315,257	\$111,026
Maurice River Township	Cumberland	7,923	\$303,767,473	\$38,340
Buena Borough	Atlantic	4,610	\$269,264,548	\$58,409
Eagleswood Township	Ocean	1,617	\$246,995,272	\$152,749
South Toms River Borough	Ocean	3,762	\$227,114,660	\$60,371
Egg Harbor City	Atlantic	4,264	\$211,221,274	\$49,536
Bass River Township	Burlington	1,442	\$177,603,122	\$123,164
Folsom Borough	Atlantic	1,870	\$168,001,591	\$89,840
Lakehurst Borough	Ocean	2,713	\$164,941,739	\$60,797
Estell Manor City	Atlantic	1,736	\$163,621,371	\$94,252
Weymouth Township	Atlantic	2,711	\$161,566,761	\$59,597
Woodbine Borough	Cape May	2,439	\$157,147,346	\$64,431
Woodland Township	Burlington	1,795	\$144,062,205	\$80,257
Port Republic City	Atlantic	1,121	\$132,055,983	\$117,802
Washington Township	Burlington	673	\$95,561,201	\$141,993
Chesilhurst Borough	Camden	1,626	\$89,070,681	\$54,779
New Hanover Township	Burlington	7,258	\$81,896,200	\$11,284
Wrightstown Borough	Burlington	795	\$35,082,533	\$44,129
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>				
Toms River Township	Ocean	91,250	\$14,088,101,666	\$154,390
Vineland City	Cumberland	61,171	\$4,045,607,693	\$66,136
Berlin Borough	Camden	7,546	\$738,300,556	\$97,840
North Hanover Township	Burlington	7,647	\$399,516,842	\$52,245
Springfield Township	Burlington	3,387	\$394,919,664	\$116,599
Corbin City	Atlantic	494	\$51,788,028	\$104,834

F3 Effective Tax Rate

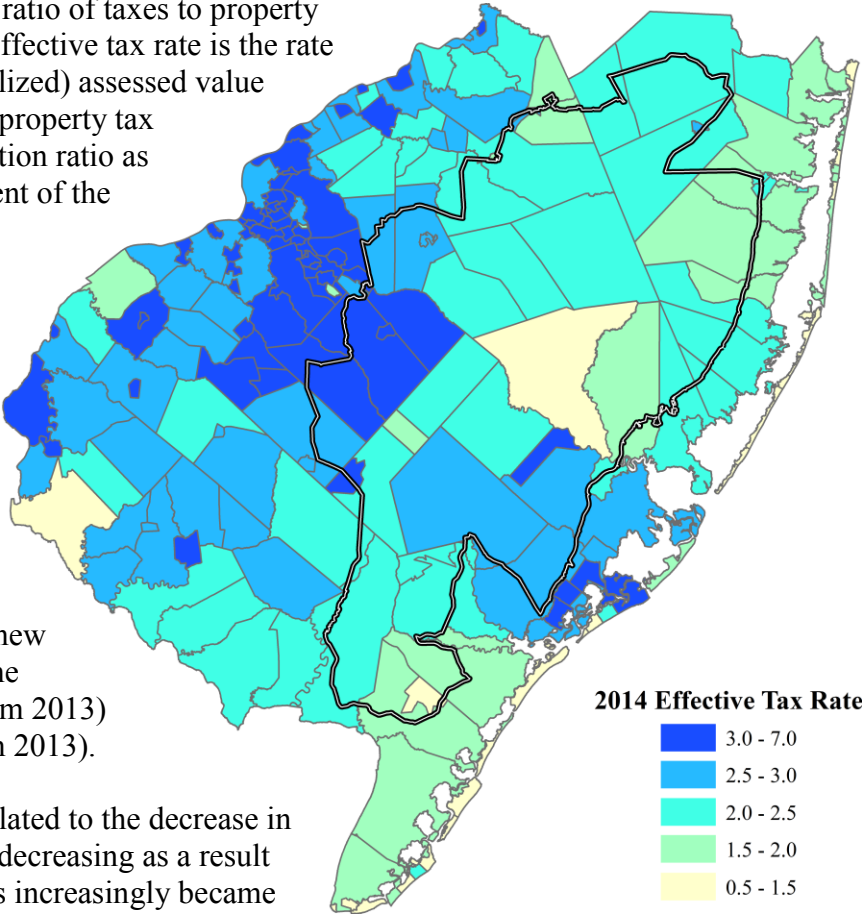
N.J. Department of the Treasury 2000 - 2013
Updated for 2015 LTEM with 2014 data

The average municipal effective tax rate continued to climb across the state in 2014. The average effective tax rate in the Pinelands rose by 6% while the Non-Pinelands and the state rose by 5%. Average municipal effective tax rates in the Pinelands (2.41) 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: Average municipal effective tax rates in the Pinelands increased by 6% in 2014, bringing the new rate to 2.41. This was still lower than the Non-Pinelands’ rate of 2.63 (up 5% from 2013) and the state’s rate of 2.53 (up 5% from 2013).

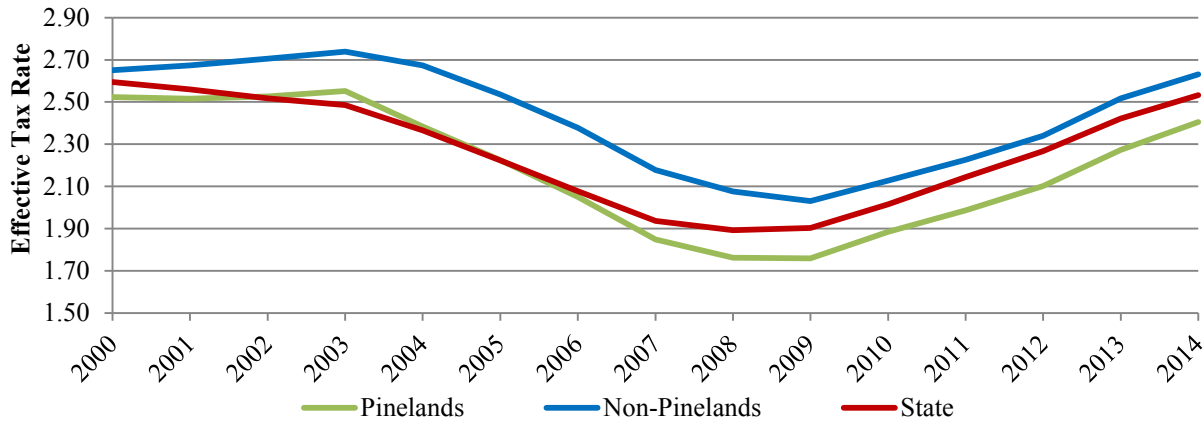


Increases in the effective tax rate are related to the decrease in property values. With property values decreasing as a result of the national recession, municipalities increasingly became unable to continue to pay for municipal services. As a result, municipalities increased their property tax rates 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 by Region

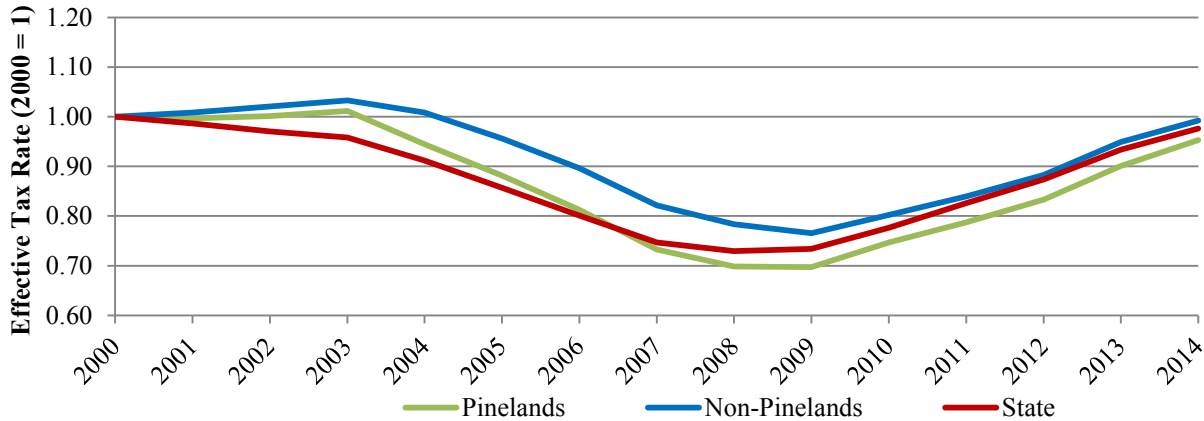
Region	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Pinelands	2.52	2.52	2.53	2.55	2.38	2.22	2.05	1.85	1.76	1.76	1.88	1.99	2.10	2.27	2.41
Non-Pinelands	2.65	2.67	2.71	2.74	2.67	2.54	2.38	2.18	2.08	2.03	2.13	2.23	2.34	2.52	2.63
State	2.59	2.56	2.52	2.49	2.37	2.22	2.08	1.94	1.89	1.90	2.01	2.14	2.27	2.42	2.53

Effective Tax Rate



The highest effective tax rate was found in Egg Harbor City at 3.93. Of all the municipalities that have land inside the Pinelands Area, 49 saw increases in their effective tax rates. The greatest percent increase was in Lakehurst Borough, which increased by 29% to 2.60, followed by Woodbine Borough with a 19% increase from 2013. The average percent increase in rates was 7%. Manchester Township, Folsom Borough, Wrightstown Borough, and Egg Harbor Township were the only municipalities to actually show decreases in their effective tax rates (down an average of about half a percent).

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 2014 there are seven municipalities with rates beyond 3.00. These are: Egg Harbor City (3.93), Berlin Township (3.54), Monroe Township (3.40), Waterford Township (3.40), Chesilhurst Borough (3.30), Winslow Township (3.24), and, new to the list, Buena Borough (3.04).

Table F3

2014 Effective Tax Rates

Municipality	County	2014 Effective Tax Rate	South N.J. Rank (of 202)
Egg Harbor City	Atlantic	3.93	13
Berlin Township	Camden	3.54	30
Monroe Township	Gloucester	3.40	34
Waterford Township	Camden	3.40	35
Chesilhurst Borough	Camden	3.30	41
Winslow Township	Camden	3.24	49
Buena Borough	Atlantic	3.04	62
Franklin Township	Gloucester	2.86	72
Medford Lakes Borough	Burlington	2.86	73
Galloway Township	Atlantic	2.79	74
Medford Township	Burlington	2.79	75
Egg Harbor Township	Atlantic	2.71	91
Hamilton Township	Atlantic	2.61	104
Wrightstown Borough	Burlington	2.60	105
Evesham Township	Burlington	2.60	106
Lakehurst Borough	Ocean	2.60	107
South Toms River Borough	Ocean	2.50	111
Mullica Township	Atlantic	2.48	116
Barneгат Township	Ocean	2.47	117
Hammonton Town	Atlantic	2.45	119
Tabernacle Township	Burlington	2.44	120
Shamong Township	Burlington	2.39	122
Southampton Township	Burlington	2.37	123
Buena Vista Township	Atlantic	2.37	124
Maurice River Township	Cumberland	2.35	125
Eagleswood Township	Ocean	2.25	132
Weymouth Township	Atlantic	2.22	134
Manchester Township	Ocean	2.20	138
Little Egg Harbor Township	Ocean	2.18	141
Stafford Township	Ocean	2.17	142
Port Republic City	Atlantic	2.17	143
Estell Manor City	Atlantic	2.16	144
Jackson Township	Ocean	2.15	148
Pemberton Township	Burlington	2.12	149
Woodland Township	Burlington	2.09	150
Beachwood Borough	Ocean	2.05	152
Plumsted Township	Ocean	2.03	153
Berkeley Township	Ocean	1.95	156
Lacey Township	Ocean	1.86	160
Bass River Township	Burlington	1.85	161
New Hanover Township	Burlington	1.84	163
Folsom Borough	Atlantic	1.79	165
Ocean Township	Ocean	1.76	167
Upper Township	Cape May	1.60	173
Dennis Township	Cape May	1.55	175
Washington Township	Burlington	1.50	177
Woodbine Borough	Cape May	1.49	178
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>			
Berlin Borough	Camden	2.96	67
Springfield Township	Burlington	2.61	103
Vineland City	Cumberland	2.30	128
North Hanover Township	Burlington	2.00	155
Toms River Township	Ocean	1.90	158
Corbin City	Atlantic	1.70	168

F4

Assessment Class Proportions

N.J. Department of Community Affairs, Div. LGS 1999 – 2014

Updated for 2015 LTEM with 2014 data

From 2013 to 2014, tax assessment class proportions stayed mostly the same. The most significant change occurred in the Non-Pinelands, where the proportion of commercial assessed valuations dropped by about 1 percentage point.

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 2014, there were no significant changes in the Pinelands proportions; all classes stayed about the same. In the Non-Pinelands, the commercial category decreased by almost one full percentage point. In the state, assessment class percentages went mostly unchanged from 2013.

Of the individual municipalities with at least 10% of their land in the Pinelands Area, Bass River Township, Lakehurst Borough, and Little Egg Harbor Township each saw their proportions from residential uses decrease by about two percentage points. In the commercial class, Wrightstown Borough saw a decrease from this category by about two percentage points, the greatest decrease. Conversely, Bass River Township and Lakehurst Borough saw gains of three and two percentage points, respectively, in the commercial category.

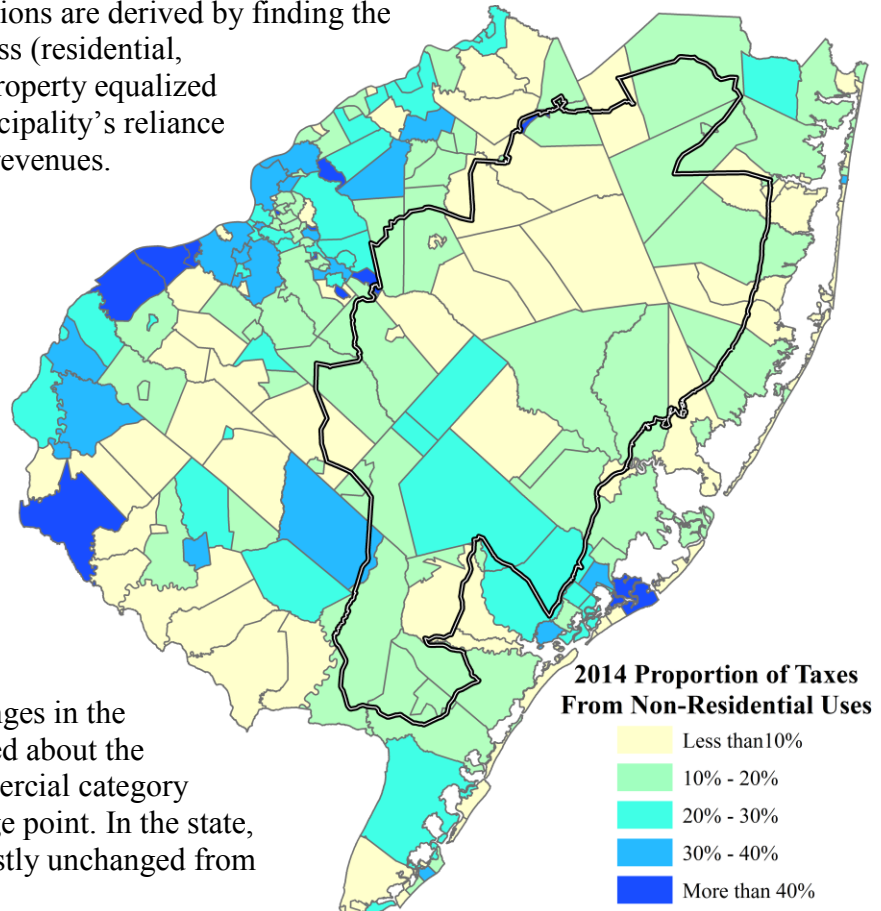


Table F4a

Assessment Class Proportions in Municipal Valuations

Pinelands

Class	2000	2005	2010	2014	% Point Change 2000 - 2014
Vacant Land	5%	4%	3%	3%	-2%
Residential	81%	83%	84%	84%	3%
Farmland	< 1%	< 1%	< 1%	< 1%	- <1%
Commercial	11%	10%	10%	10%	- <1%
Industrial	1%	1%	1%	1%	- <1%
Apartment	2%	2%	2%	2%	- <1%

Non-Pinelands

Class	2000	2005	2010	2014	% Point Change 2000 - 2014
Vacant Land	3%	3%	2%	2%	- <1%
Residential	73%	78%	77%	79%	5%
Farmland	< 1%	< 1%	< 1%	< 1%	- <1%
Commercial	19%	16%	16%	15%	-4%
Industrial	3%	2%	2%	2%	-1%
Apartment	2%	2%	2%	2%	- <1%

State

Class	2000	2005	2010	2014	% Point Change 2000 - 2014
Vacant Land	3%	2%	2%	2%	-1%
Residential	73%	76%	77%	77%	4%
Farmland	< 1%	< 1%	< 1%	< 1%	- <1%
Commercial	15%	15%	14%	14%	-1%
Industrial	6%	5%	4%	4%	-2%
Apartment	3%	3%	3%	3%	< 1%

Table F4b Assessment Class Proportions for Pinelands Municipalities (2014)

Municipality	County	Vacant	Residential	Agriculture	Commercial	Industrial	Apartments
Medford Lakes Borough	Burlington	< 1%	98%	0%	2%	0%	0%
Shamong Township	Burlington	1%	95%	< 1%	3%	< 1%	0%
Beachwood Borough	Ocean	1%	95%	0%	3%	< 1%	< 1%
Tabernacle Township	Burlington	1%	94%	< 1%	4%	< 1%	0%
Port Republic City	Atlantic	3%	94%	< 1%	3%	0%	0%
Ocean Township	Ocean	4%	91%	< 1%	5%	< 1%	0%
Waterford Township	Camden	2%	91%	< 1%	6%	< 1%	1%
Plumsted Township	Ocean	2%	90%	< 1%	5%	1%	< 1%
Berkeley Township	Ocean	3%	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%
Estell Manor City	Atlantic	6%	89%	1%	3%	1%	< 1%
Little Egg Harbor Township	Gloucester	6%	89%	< 1%	6%	< 1%	< 1%
Franklin Township	Gloucester	3%	88%	< 1%	8%	0%	< 1%
Barnegat Township	Ocean	4%	88%	< 1%	6%	< 1%	1%
Medford Township	Burlington	1%	88%	< 1%	9%	1%	2%
Jackson Township	Ocean	3%	87%	< 1%	8%	1%	1%
Winslow Township	Camden	3%	87%	< 1%	7%	1%	2%
Chesilhurst Borough	Camden	7%	86%	0%	5%	1%	< 1%
Upper Township	Cape May	4%	86%	< 1%	9%	1%	< 1%
Woodland Township	Burlington	5%	85%	1%	4%	6%	0%
South Toms River Borough	Ocean	2%	84%	0%	14%	< 1%	0%
Lacey Township	Ocean	3%	84%	< 1%	8%	5%	< 1%
Monroe Township	Gloucester	3%	84%	< 1%	12%	< 1%	1%
Buena Vista Township	Atlantic	5%	84%	< 1%	8%	2%	< 1%
Stafford Township	Ocean	2%	84%	< 1%	14%	< 1%	< 1%
Weymouth Township	Atlantic	5%	83%	< 1%	10%	< 1%	1%
Galloway Township	Atlantic	3%	83%	< 1%	11%	< 1%	2%
Maurice River Township	Cumberland	4%	83%	1%	6%	6%	< 1%
Buena Borough	Atlantic	3%	83%	1%	10%	1%	3%
Lakehurst Borough	Ocean	1%	80%	0%	17%	0%	1%
Washington Township	Burlington	3%	80%	2%	13%	2%	0%
Dennis Township	Cape May	5%	79%	< 1%	16%	0%	0%
Evesham Township	Burlington	1%	79%	< 1%	15%	1%	5%
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%
Bass River Township	Burlington	6%	77%	< 1%	17%	0%	0%
New Hanover Township	Burlington	3%	77%	1%	19%	< 1%	0%
Folsom Borough	Atlantic	4%	75%	< 1%	9%	12%	0%
Hammonton Town	Atlantic	2%	75%	1%	20%	2%	1%
Egg Harbor Township	Atlantic	4%	75%	< 1%	20%	1%	< 1%
Eagleswood Township	Ocean	11%	75%	< 1%	12%	2%	< 1%
Hamilton Township	Atlantic	4%	69%	< 1%	21%	1%	5%
Berlin Township	Camden	3%	54%	< 1%	33%	9%	1%
Wrightstown Borough	Burlington	3%	52%	< 1%	31%	1%	12%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	3%	86%	2%	9%	0%	0%
Corbin City	Atlantic	6%	84%	< 1%	10%	0%	0%
North Hanover Township	Burlington	2%	81%	1%	13%	< 1%	3%
Toms River Township	Ocean	2%	80%	< 1%	16%	1%	2%
Berlin Borough	Camden	2%	80%	< 1%	15%	1%	1%
Vineland City	Cumberland	1%	64%	< 1%	24%	7%	3%

F5 Local Municipal Purpose Revenues & State Aid

N.J. Department of Community Affairs, Div. LGS 1999 – 2014

Updated for 2015 LTEM with 2014 data

In 2014, per capita municipal budgets decreased slightly in the Pinelands to \$869 per capita (down less than half a percent). Budgets in the Non-Pinelands increased 2% from 2013 to \$1,418 per capita.

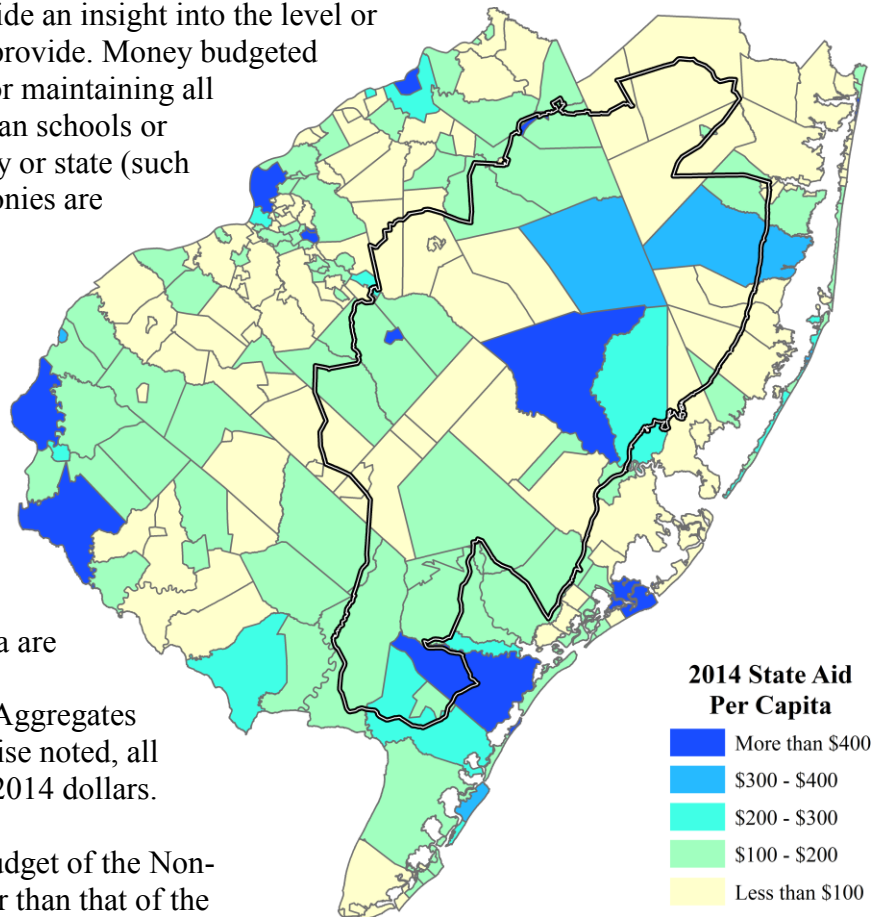
Description: Per capita revenues provide an insight into the level or amount of service a municipality can provide. Money budgeted for local municipal purposes is used for maintaining all services within a municipality other than schools or infrastructure maintained by the county or state (such as roads). 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 2014 dollars.

Findings: The per capita municipal budget of the Non-Pinelands has consistently been greater than that of the Pinelands. From 1999 to 2014, the per capita budgets of the Pinelands municipalities were, on average, 66% of that of the Non-Pinelands. In 1999, the per capita budget in the Pinelands was \$819. It was \$1,206 in the Non-Pinelands. In 2014, those budgets were \$869 and \$1,418, respectively.

Meanwhile, state aid to the Pinelands has declined overall. State aid per capita in the Pinelands was \$228 in 1999. With the exception of slight increases in 2001 and 2004, this figure has continued to decrease. In 2014, the Pinelands received \$119 per capita. This represents a 2% decrease from 2013 and a 48% 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 \$254 per capita in 1999 to \$256 per capita in 2007. In 2010, state aid in the Non-Pinelands fell to its low point at \$145 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 \$178 per capita. In 2014, state aid per capita in the Non-Pinelands was \$180, a 3% increase from 2013.

Municipal Budgets and State Aid^{20,21}

	Population Estimate	Total Municipal Budget	Municipal Budget per Capita	State Aid	State Aid per Capita
Pinelands in 2000	618,063	\$501,654,744	\$812	\$134,713,192	\$217.96
Pinelands in 2014	705,262	\$612,636,203	\$869	\$83,778,740	\$119
Change	14%	22%	7%	-38%	-45%
Non-Pinelands in 2000	1,645,496	\$1,984,432,422	\$1,206	\$407,994,353	\$248
Non-Pinelands in 2014	1,725,407	\$2,446,760,426	\$1,418	\$310,813,764	\$180
Change	5%	23%	18%	-24%	-27%

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 \$43,902,580, followed by Stafford Township and Jackson Township, the only other Pinelands municipalities to have a budget greater than \$40 million. Only 16 other municipalities have budgets in excess of \$10 million. Washington Township has the only municipal budget that is less than \$1 million (in 2013, Port Republic City was the only municipality in this category).

Wrightstown Borough has the greatest budget per capita at \$2,745 while the lowest budget per capita belongs to New Hanover Township at \$246. There were 18 Pinelands municipalities that increased their municipal budgets per capita by an average of \$110 (\$49 average increase if Wrightstown Borough is not included). Conversely, 29 Pinelands municipalities decreased their municipal budgets per capita by an average of \$53.

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.

New Hanover Township’s state aid increased by \$8 per capita (up 7%). Washington Township is the only other municipality to see an increase in state aid (about 15¢ per capita). Among the other 45 Pinelands municipalities, the average decrease was by \$3 per capita. Plumsted Township saw the greatest decrease of \$18 per capita while Lacey Township saw the next greatest decrease of \$9 per capita.

²⁰ Local Municipal Purposes + Total of Miscellaneous Revenues; does not include school budget.

²¹ New Hanover Township and Washington Township 2011-2014 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	\$189,765,001	\$310,327,224	\$500,092,225	\$819	\$139,493,906	\$228
2000	618,063	\$193,424,024	\$308,230,720	\$501,654,744	\$812	\$134,713,192	\$218
2001	630,581	\$208,398,791	\$315,705,550	\$524,104,341	\$831	\$139,234,933	\$221
2002	643,688	\$216,837,542	\$319,071,952	\$535,909,494	\$833	\$136,135,051	\$211
2003	655,268	\$231,693,354	\$315,273,579	\$546,966,933	\$835	\$133,881,548	\$204
2004	664,840	\$247,022,348	\$316,054,498	\$563,076,845	\$847	\$138,050,125	\$208
2005	671,991	\$261,400,348	\$329,826,506	\$591,226,854	\$880	\$135,536,774	\$202
2006	678,998	\$282,016,060	\$333,512,137	\$615,528,196	\$907	\$131,103,616	\$193
2007	683,974	\$300,572,844	\$334,892,618	\$635,465,461	\$929	\$129,943,548	\$190
2008	688,959	\$321,045,902	\$318,495,759	\$639,541,661	\$928	\$115,887,983	\$168
2009	693,936	\$342,092,237	\$308,292,913	\$650,385,151	\$937	\$112,966,642	\$163
2010	698,092	\$358,232,705	\$280,131,848	\$638,364,552	\$914	\$92,245,278	\$132
2011	701,018	\$364,274,060	\$250,686,324	\$614,960,384	\$877	\$88,230,428	\$126
2012	702,935	\$366,763,568	\$230,562,227	\$597,325,794	\$850	\$86,694,184	\$123
2013	704,310	\$376,000,382	\$237,989,479	\$613,989,861	\$872	\$85,280,063	\$121
2014	705,262	\$381,022,241	\$231,613,962	\$612,636,203	\$869	\$83,778,740	\$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	\$922,793,110	\$1,053,515,254	\$1,976,308,365	\$1,206	\$415,544,032	\$254
2000	1,645,496	\$921,867,808	\$1,062,564,614	\$1,984,432,422	\$1,206	\$407,994,353	\$248
2001	1,655,892	\$919,331,967	\$1,063,840,298	\$1,983,172,265	\$1,198	\$409,256,149	\$247
2002	1,672,319	\$968,777,845	\$1,082,605,062	\$2,051,382,907	\$1,227	\$400,006,394	\$239
2003	1,686,044	\$1,012,049,451	\$1,079,175,548	\$2,091,225,000	\$1,240	\$392,996,332	\$233
2004	1,697,698	\$1,055,900,705	\$1,134,957,390	\$2,190,858,096	\$1,290	\$409,199,230	\$241
2005	1,705,381	\$1,120,095,442	\$1,181,252,956	\$2,301,348,398	\$1,349	\$434,691,160	\$255
2006	1,713,543	\$1,178,699,327	\$1,127,155,546	\$2,305,854,872	\$1,346	\$424,594,630	\$248
2007	1,716,916	\$1,225,739,574	\$1,147,432,903	\$2,373,172,477	\$1,382	\$438,787,710	\$256
2008	1,719,558	\$1,312,661,252	\$1,147,812,638	\$2,460,473,890	\$1,431	\$376,659,630	\$219
2009	1,721,609	\$1,399,671,977	\$1,067,970,588	\$2,467,642,565	\$1,433	\$385,467,062	\$224
2010	1,723,949	\$1,465,883,614	\$1,017,010,825	\$2,482,894,439	\$1,440	\$249,933,259	\$145
2011	1,726,247	\$1,445,702,287	\$968,865,719	\$2,414,568,006	\$1,399	\$307,959,989	\$178
2012	1,727,178	\$1,450,399,019	\$904,500,307	\$2,354,899,327	\$1,363	\$295,426,372	\$171
2013	1,725,583	\$1,454,227,197	\$942,395,138	\$2,396,622,336	\$1,389	\$303,190,574	\$176
2014	1,725,407	\$1,473,538,981	\$973,221,445	\$2,446,760,426	\$1,418	\$310,813,764	\$180

Table F5b Municipal Purpose Revenues and State Aid by Municipality (2014)

Municipality	County	Population Estimate	Municipal Budget	Municipal Budget per Capita	Total State Aid	State Aid per Capita
Wrightstown Borough	Burlington	795	\$2,182,328	\$2,745	\$412,067	\$518
Berlin Township	Camden	5,362	\$9,351,669	\$1,744	\$1,287,847	\$240
Chesilhurst Borough	Camden	1,626	\$2,632,403	\$1,619	\$826,340	\$508
Stafford Township	Ocean	26,809	\$42,965,916	\$1,603	\$2,606,872	\$97
Washington Township	Burlington	673	\$984,810	\$1,463	\$817,007	\$1,214
Lakehurst Borough	Ocean	2,713	\$3,921,831	\$1,446	\$295,439	\$109
Egg Harbor City	Atlantic	4,264	\$5,587,720	\$1,310	\$473,461	\$111
Ocean Township	Ocean	8,658	\$11,088,676	\$1,281	\$606,801	\$70
Eagleswood Township	Ocean	1,617	\$1,827,164	\$1,130	\$203,363	\$126
Woodbine Borough	Cape May	2,439	\$2,747,955	\$1,127	\$289,537	\$119
Little Egg Harbor Township	Ocean	20,396	\$22,380,348	\$1,097	\$1,449,056	\$71
South Toms River Borough	Ocean	3,762	\$4,115,104	\$1,094	\$330,995	\$88
Medford Lakes Borough	Burlington	4,110	\$4,326,593	\$1,053	\$289,600	\$70
Berkeley Township	Ocean	41,950	\$43,902,580	\$1,047	\$4,256,465	\$101
Upper Township	Cape May	12,113	\$12,486,011	\$1,031	\$6,323,653	\$522
Barnegat Township	Ocean	22,303	\$22,846,374	\$1,024	\$1,048,932	\$47
Lacey Township	Ocean	28,211	\$28,673,289	\$1,016	\$11,273,840	\$400
Port Republic City	Atlantic	1,121	\$1,137,911	\$1,015	\$176,307	\$157
Hamilton Township	Atlantic	26,647	\$25,619,624	\$961	\$2,841,043	\$107
Monroe Township	Gloucester	37,379	\$34,702,676	\$928	\$4,035,796	\$108
Waterford Township	Camden	10,732	\$9,898,209	\$922	\$1,304,676	\$122
Mullica Township	Atlantic	6,155	\$5,508,230	\$895	\$493,216	\$80
Beachwood Borough	Ocean	11,253	\$9,894,638	\$879	\$664,673	\$59
Buena Borough	Atlantic	4,610	\$3,980,525	\$863	\$419,272	\$91
Medford Township	Burlington	23,357	\$19,996,077	\$856	\$1,991,135	\$85
Egg Harbor Township	Atlantic	43,851	\$37,452,155	\$854	\$6,039,065	\$138
Pemberton Township	Burlington	27,822	\$23,512,909	\$845	\$3,018,097	\$108
Bass River Township	Burlington	1,442	\$1,153,346	\$800	\$304,290	\$211
Hammonton Town	Atlantic	14,765	\$11,769,791	\$797	\$1,272,714	\$86
Evesham Township	Burlington	45,613	\$33,650,125	\$738	\$3,164,693	\$69
Jackson Township	Ocean	56,449	\$41,022,851	\$727	\$3,408,439	\$60
Winslow Township	Camden	38,895	\$28,226,623	\$726	\$6,050,378	\$156
Manchester Township	Ocean	43,555	\$31,548,169	\$724	\$3,217,467	\$74
Woodland Township	Burlington	1,795	\$1,283,548	\$715	\$628,559	\$350
Dennis Township	Cape May	6,319	\$4,442,068	\$703	\$1,643,523	\$260
Galloway Township	Atlantic	37,583	\$25,776,182	\$686	\$2,581,284	\$69
Folsom Borough	Atlantic	1,870	\$1,274,969	\$682	\$186,082	\$100
Franklin Township	Gloucester	16,702	\$10,603,724	\$635	\$1,451,704	\$87
Estell Manor City	Atlantic	1,736	\$1,058,235	\$610	\$316,382	\$182
Buena Vista Township	Atlantic	7,586	\$4,517,654	\$596	\$716,567	\$94
Southampton Township	Burlington	10,362	\$6,068,964	\$586	\$1,105,861	\$107
Tabernacle Township	Burlington	6,954	\$3,498,333	\$503	\$630,161	\$91
Weymouth Township	Atlantic	2,711	\$1,357,280	\$501	\$281,895	\$104
Maurice River Township	Cumberland	7,923	\$3,785,272	\$478	\$1,115,305	\$141
Shamong Township	Burlington	6,432	\$2,631,393	\$409	\$582,995	\$91
Plumsted Township	Ocean	8,584	\$3,457,169	\$403	\$452,322	\$53
New Hanover Township	Burlington	7,258	\$1,786,780	\$246	\$893,564	\$123
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Toms River Township	Ocean	91,250	\$124,607,123	\$1,366	\$8,492,807	\$93
Corbin City	Atlantic	494	\$505,334	\$1,023	\$102,127	\$207
Springfield Township	Burlington	3,387	\$3,443,598	\$1,017	\$426,607	\$126
Berlin Borough	Camden	7,546	\$7,240,556	\$960	\$696,697	\$92
Vineland City	Cumberland	61,171	\$58,207,932	\$952	\$6,190,788	\$101
North Hanover Township	Burlington	7,647	\$3,294,891	\$431	\$765,714	\$100

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.

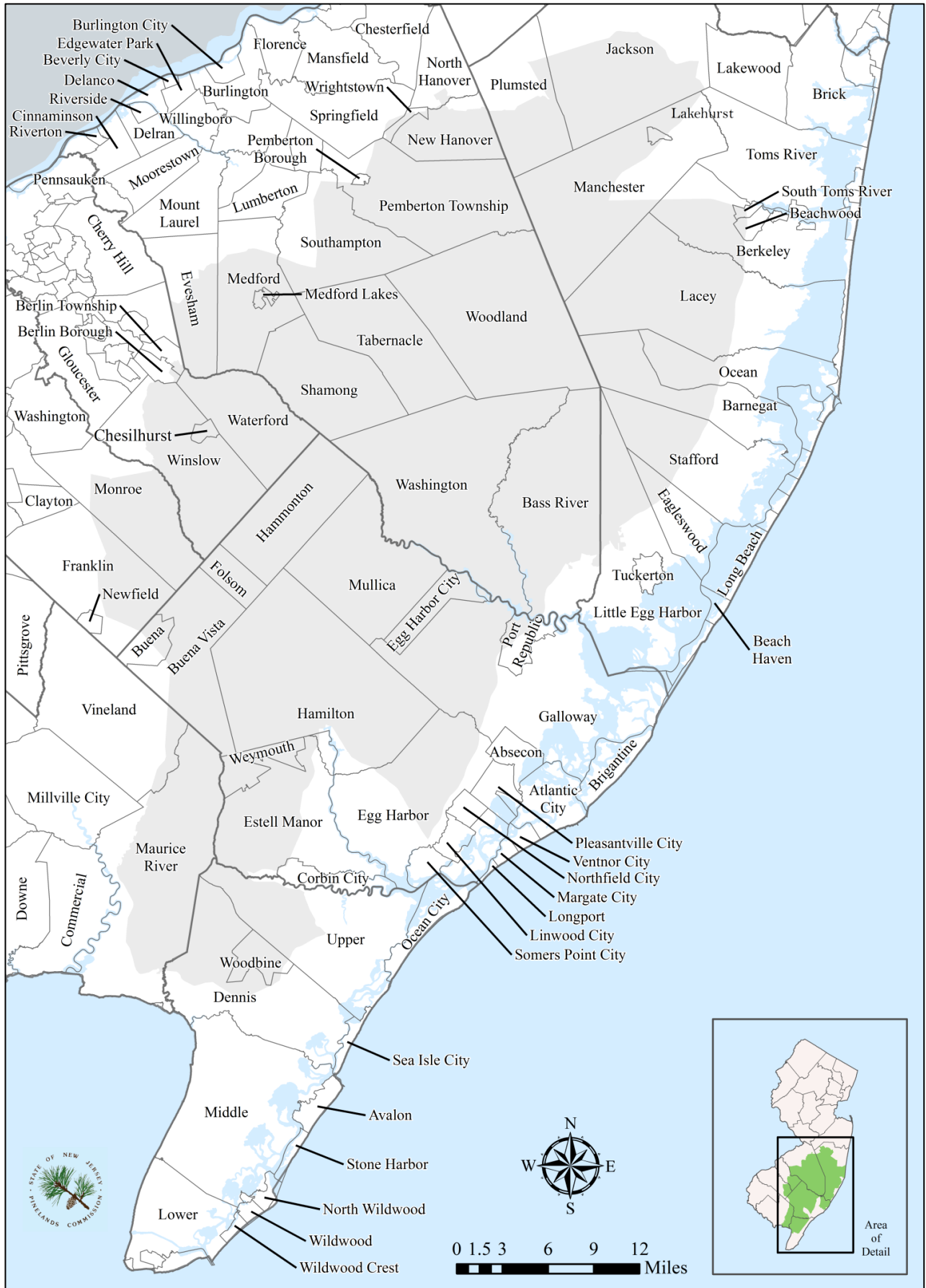
Since the PDC program is market-driven, its ultimate success depends upon a healthy balance between supply and demand pressures in the land development market in the Pinelands. Initially, the PDC program was slow to be utilized by both developers and land owners in the region. However, significant activity in the PDC market occurred between 1996 and 2007, 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 have continued to fall since then. The mean sales price for a development right in fiscal year 2015 was \$9,400.

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 Commission's Policy and Implementation Committee in the summer of 2007. Revised recommendations were prepared in 2015 after several years of meetings with interested parties. These recommendations, along with updated PDC supply and demand estimate, are expected to be the subject of discussion by the Commission throughout 2016.

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%	26%	17%
Burlington	524,205	334,224	189,981	64%	36%	23%
Camden	145,592	54,907	90,685	38%	6%	6%
Cape May	182,632	34,807	147,825	19%	4%	8%
Cumberland	321,645	45,398	276,247	14%	5%	14%
Gloucester	215,617	33,581	182,036	16%	4%	10%
Ocean	485,569	187,559	298,010	39%	20%	21%

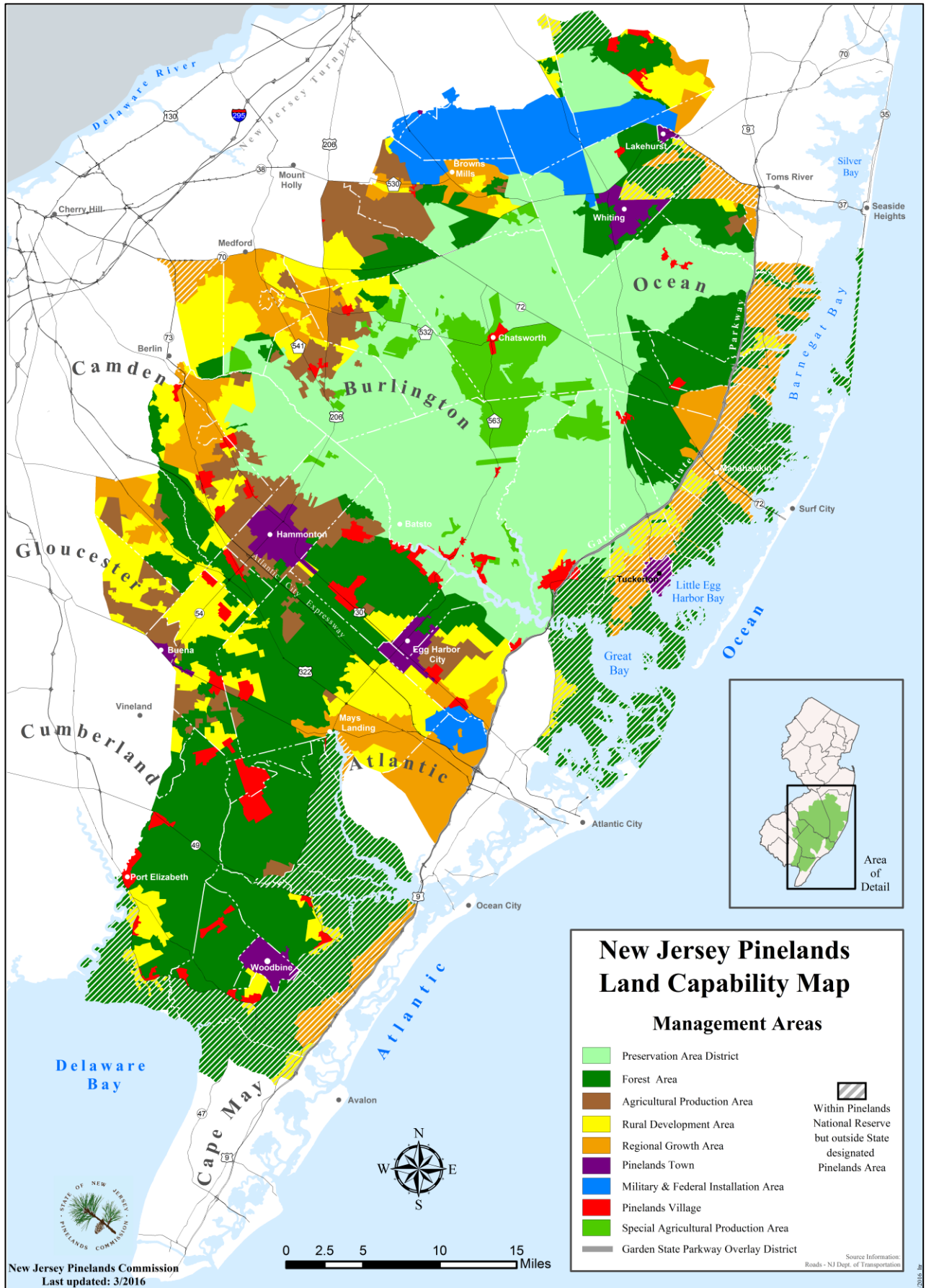
Appendix D. Municipalities of the New Jersey Pinelands



Appendix E. Pinelands Management Areas

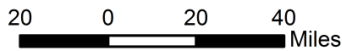
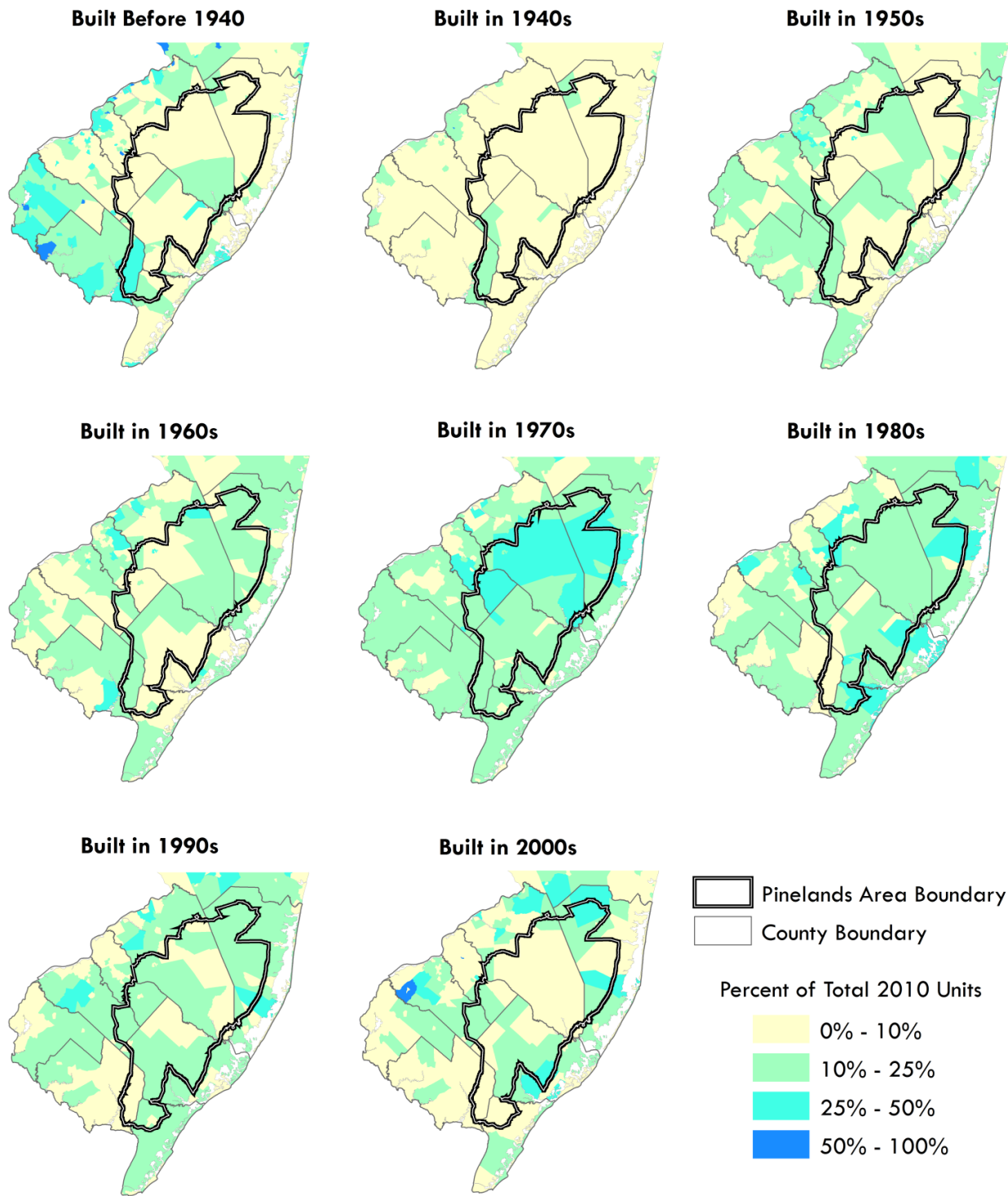
Management Area	Description	Permitted Uses	
		Residential	Nonresidential
Preservation Area District (PAD)	Heart of the Pinelands environment and the most critical ecological region; a large, contiguous wilderness-like area of forest that supports diverse plant and animal communities and is home to many 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.

- **Poverty Rates:** The poverty rate bar graph is based on the supplemental variable in this year's report. This data is produced by the U.S. Census Bureau. Poverty rate data stopped being decennially collected data as of the 2000 Census. Since then, this data is collected through the American Community Survey. Due to smaller sampling sizes than those used to produce the decennial U.S. Census, this data is prone to having a larger margin of error. For more information, visit the U.S. Census Bureau's website as well as American Fact Finder for the data, itself.

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
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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 2014



Pinelands Management Areas

Conservation

- Preservation
- 21% Forest
- Agricultural Production
- 39% Special Ag Production

Development

- 28% Regional Growth
- 12% Pinelands Town
- Pinelands Village

Intermediate

- Rural Development
- Federal**
- Military & Federal

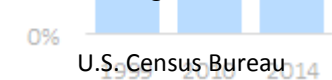
- Pinelands Area Boundary
- Municipal Boundary
- Pinelands Village
- Water Body

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

2014 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 2014		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	Private Sector Avg. Annual Wages
N.J. Dept. of Labor		N.J. Dept. of Labor	N.J. Dept. of Labor

Estimated Poverty Rate by Year

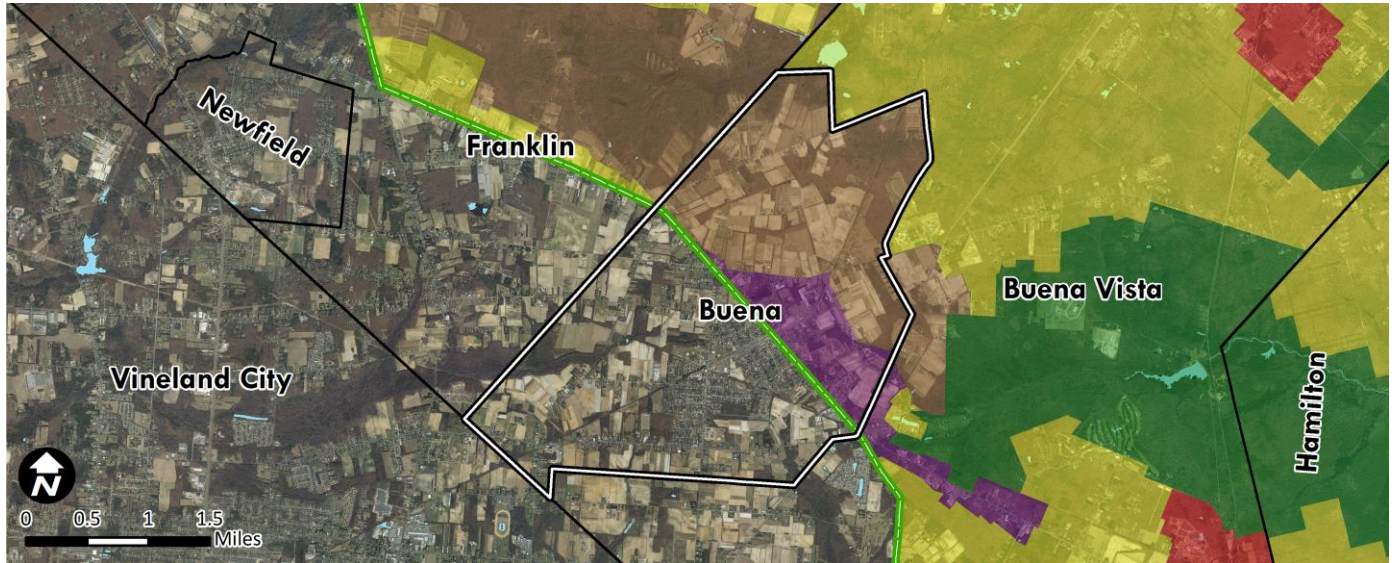
The poverty rate bar graphs shows the estimated rate of poverty in 1999 (Census year 2000), 2010, and 2014. Please consult the Census Bureau's website for more information on margins of error.



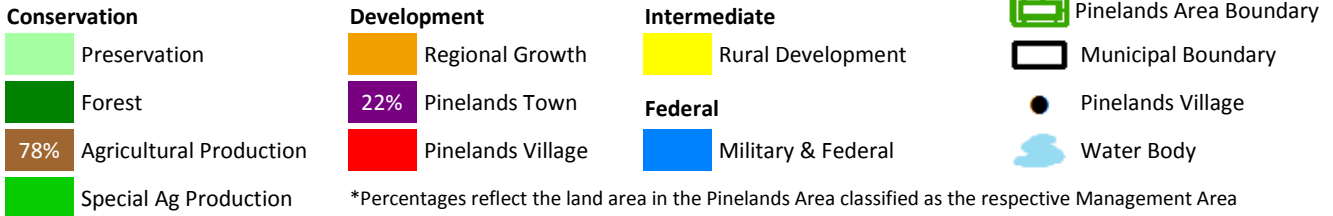
Buena Borough

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

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

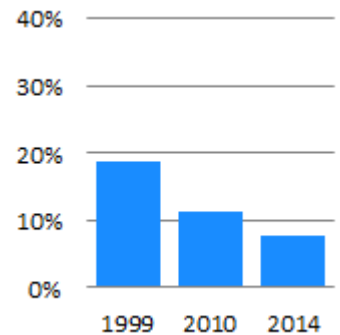


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,610	12,033	117
Population Density (per mile ²)	610	1,763	126
Population Change - 2010 to 2014	0.2%	-0.2%	64
% Land Protected in Pinelands Area	21%	37%*	34*
Assessed Acres of Farmland	2,294	2,264	58
Building Permits Issued	1	37	152
Housing Transactions	20	84	131
Average Home Sale Price	\$143,910	\$286,205	165
Equalized Property Value (millions)	\$269.3	\$1,490.9	147
Effective Tax Rate	3.04	2.58	62
Average Residential Property Tax Bill	\$4,799	\$5,845	138
Per Capita Income (Estimate)	\$21,730	\$32,392	184
Estimated Unemployment Rate	9.6%	8.1%	48

Estimated Poverty Rate by Year

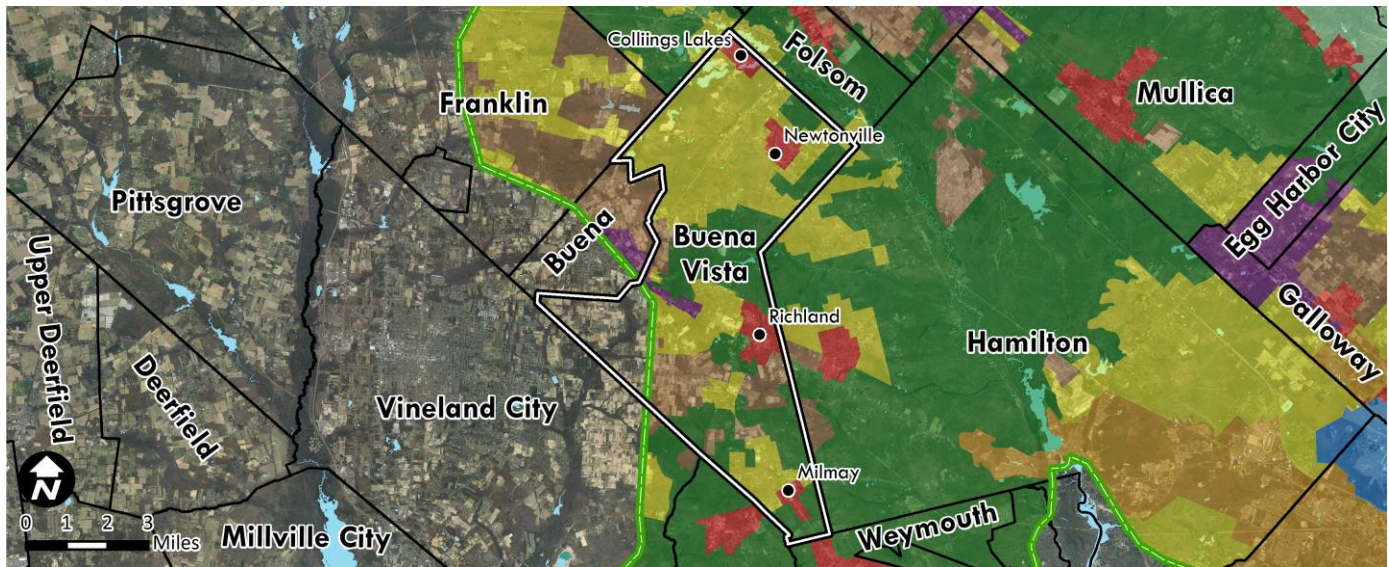


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
979	91	\$45,859

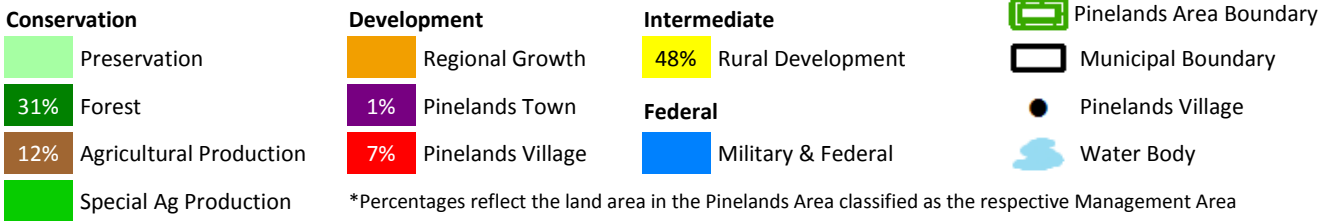
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Buena Vista Township

Pinelands Area 2010 population: 6,316 (83% of total population)
 Pinelands Area acreage: 23,954 (90% of total acreage)

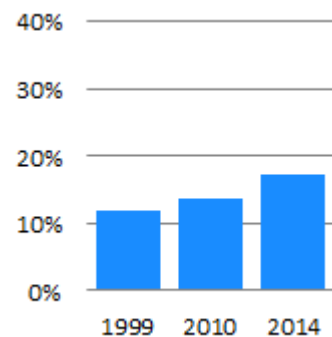


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,586	12,033	89
Population Density (per mile ²)	183	1,763	170
Population Change - 2010 to 2014	0.2%	-0.2%	62
% Land Protected in Pinelands Area	17%	37%*	35*
Assessed Acres of Farmland	4,225	2,264	45
Building Permits Issued	6	37	119
Housing Transactions	22	84	127
Average Home Sale Price	\$210,936	\$286,205	101
Equalized Property Value (millions)	\$606.3	\$1,490.9	108
Effective Tax Rate	2.37	2.58	124
Average Residential Property Tax Bill	\$4,999	\$5,845	122
Per Capita Income (Estimate)	\$24,022	\$32,392	173
Estimated Unemployment Rate	10.6%	8.1%	27

Estimated Poverty Rate by Year

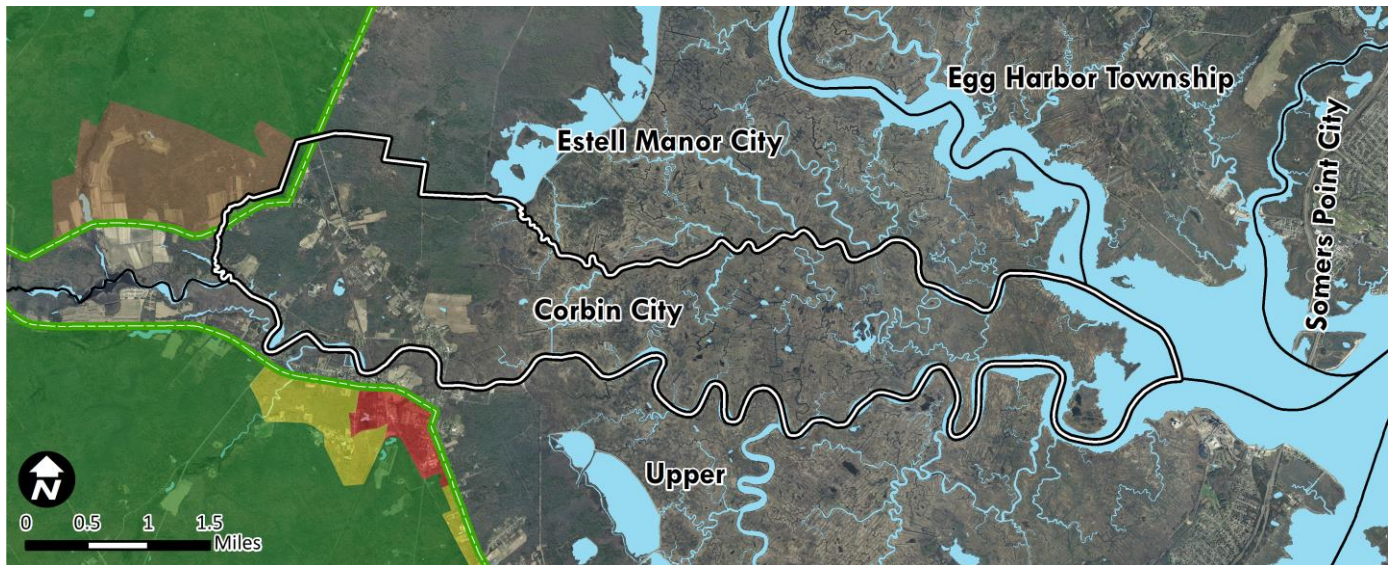


Private Sector Employment 573	Private Sector Establishments 67	Private Sector Avg. Annual Wages \$31,281
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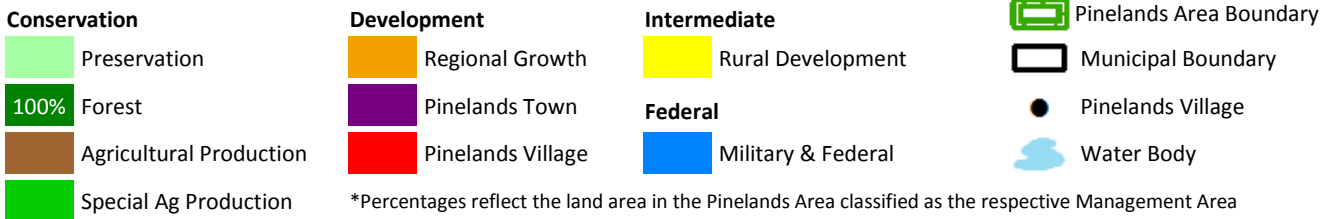
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Corbin City

Pinelands Area 2010 population: 5 (1% of total population)
 Pinelands Area acreage: 68 (1% of total acreage)

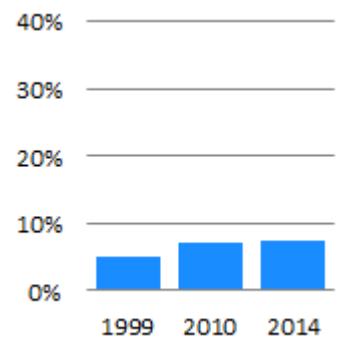


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	494	12,033	197
Population Density (per mile ²)	56	1,763	192
Population Change - 2010 to 2014	0.4%	-0.2%	55
% Land Protected in Pinelands Area	9%	37%*	39*
Assessed Acres of Farmland	177	2,264	99
Building Permits Issued	1	37	152
Housing Transactions	0	84	196
Average Home Sale Price	-	\$286,205	-
Equalized Property Value (millions)	\$51.8	\$1,490.9	195
Effective Tax Rate	1.70	2.58	168
Average Residential Property Tax Bill	\$3,385	\$5,845	193
Per Capita Income (Estimate)	\$26,859	\$32,392	145
Estimated Unemployment Rate	7.3%	8.1%	118

Estimated Poverty Rate by Year

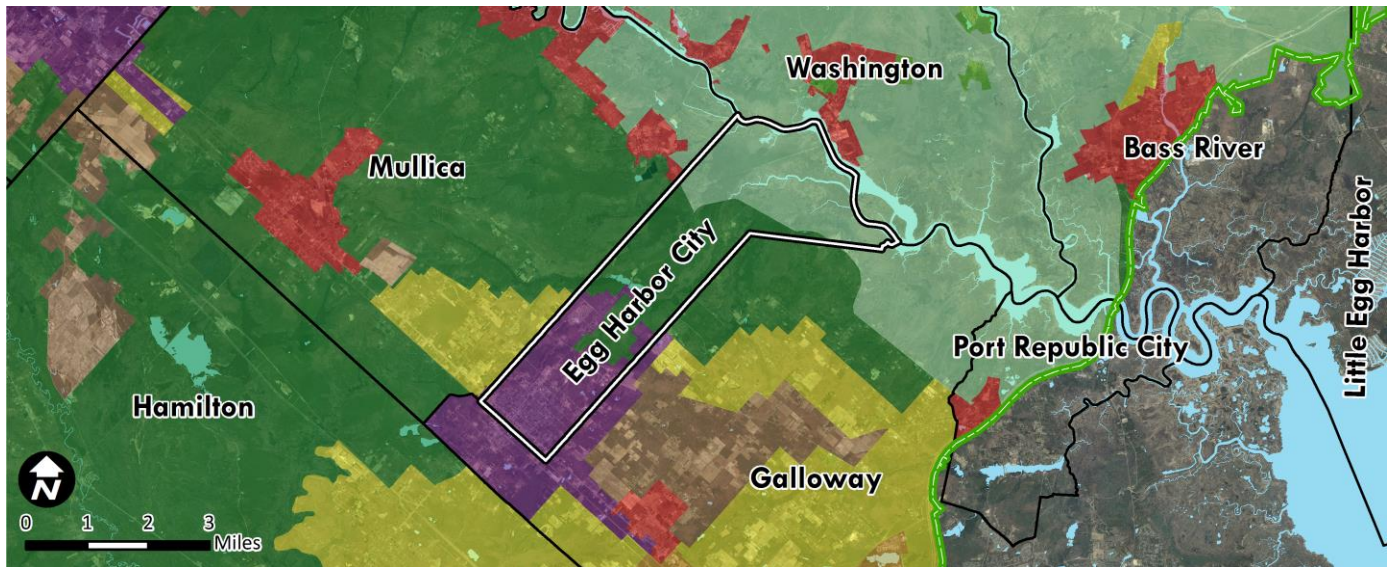


Private Sector Employment 45	Private Sector Establishments 11	Private Sector Avg. Annual Wages \$16,561
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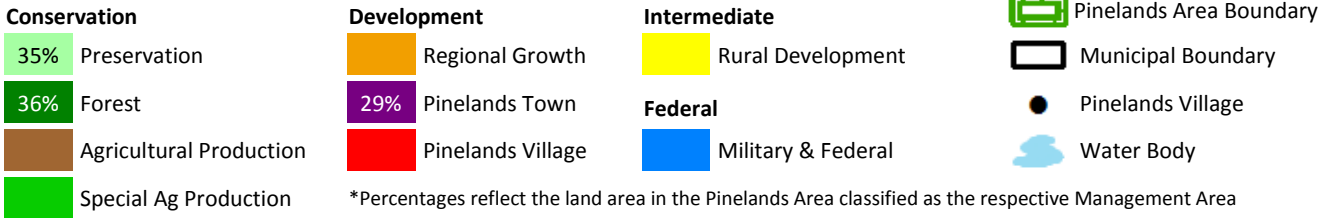
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Egg Harbor City

Pinelands Area 2010 population: 4,243 (100% of total population)
 Pinelands Area acreage: 7,372 (100% of total acreage)

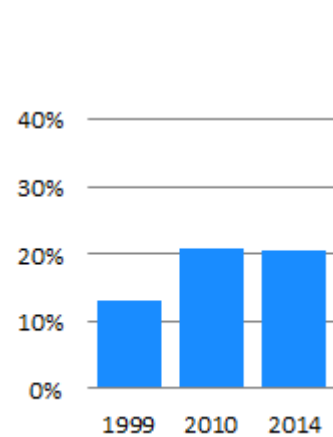


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,264	12,033	121
Population Density (per mile ²)	370	1,763	144
Population Change - 2010 to 2014	0.5%	-0.2%	53
% Land Protected in Pinelands Area	2%	37%*	43*
Assessed Acres of Farmland	0	2,264	123
Building Permits Issued	16	37	74
Housing Transactions	15	84	143
Average Home Sale Price	\$109,127	\$286,205	185
Equalized Property Value (millions)	\$211.2	\$1,490.9	165
Effective Tax Rate	3.93	2.58	13
Average Residential Property Tax Bill	\$5,893	\$5,845	83
Per Capita Income (Estimate)	\$21,061	\$32,392	186
Estimated Unemployment Rate	10.6%	8.1%	28

Estimated Poverty Rate by Year

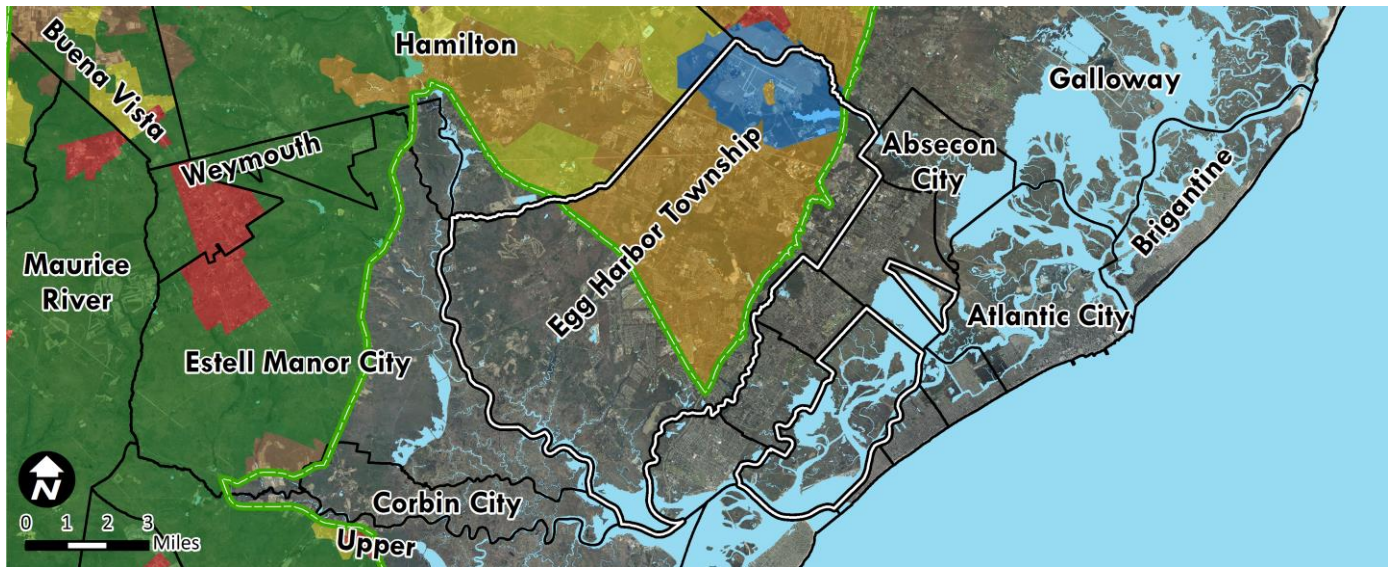


Private Sector Employment 2,540	Private Sector Establishments 224	Private Sector Avg. Annual Wages \$31,661
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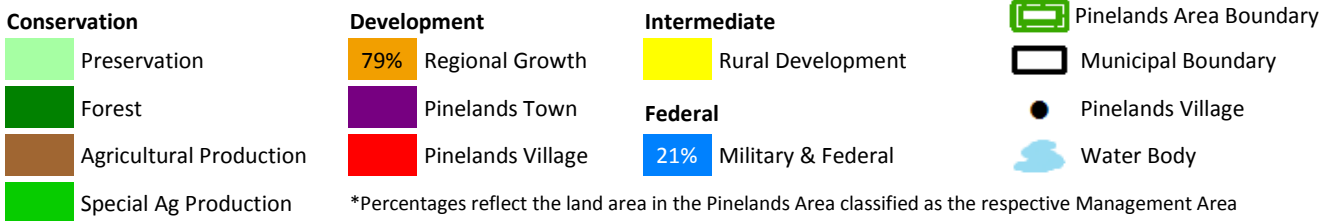
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Egg Harbor Township

Pinelands Area 2010 population: 27,556 (64% of total population)
 Pinelands Area acreage: 17,867 (44% of total acreage)

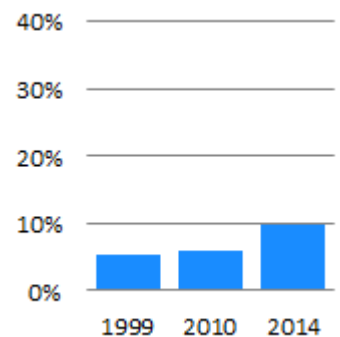


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	43,851	12,033	11
Population Density (per mile ²)	694	1,763	121
Population Change - 2010 to 2014	1.2%	-0.2%	34
% Land Protected in Pinelands Area	1%	37%*	44*
Assessed Acres of Farmland	2,235	2,264	61
Building Permits Issued	54	37	38
Housing Transactions	279	84	12
Average Home Sale Price	\$235,709	\$286,205	81
Equalized Property Value (millions)	\$4,161.3	\$1,490.9	16
Effective Tax Rate	2.71	2.58	91
Average Residential Property Tax Bill	\$6,044	\$5,845	77
Per Capita Income (Estimate)	\$28,457	\$32,392	121
Estimated Unemployment Rate	9.7%	8.1%	44

Estimated Poverty Rate by Year

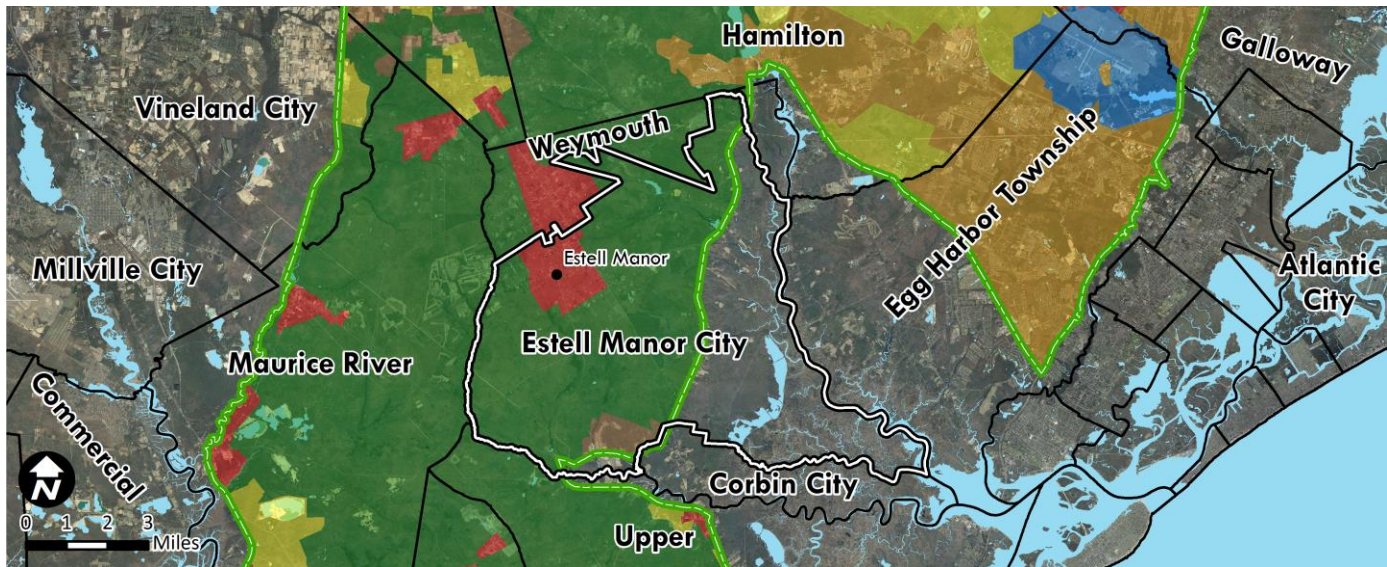


Private Sector Employment 11,889	Private Sector Establishments 871	Private Sector Avg. Annual Wages \$48,685
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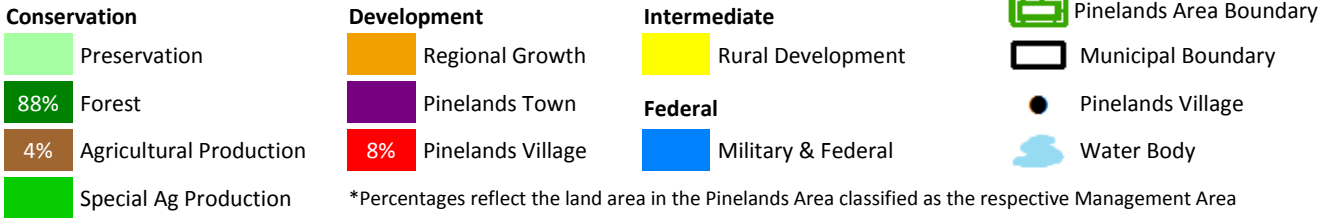
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Estell Manor City

Pinelands Area 2010 population: 1,624 (94% of total population)
 Pinelands Area acreage: 22,423 (63% of total acreage)

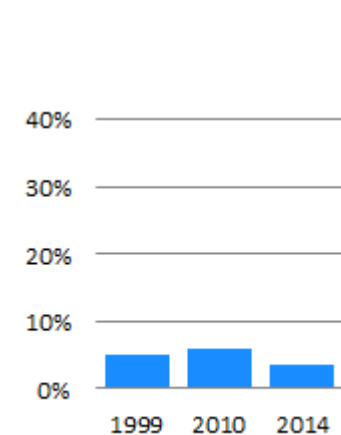


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,736	12,033	166
Population Density (per mile ²)	31	1,763	196
Population Change - 2010 to 2014	0.1%	-0.2%	69
% Land Protected in Pinelands Area	55%	37%*	15*
Assessed Acres of Farmland	4,642	2,264	43
Building Permits Issued	1	37	152
Housing Transactions	4	84	180
Average Home Sale Price	\$282,500	\$286,205	51
Equalized Property Value (millions)	\$163.6	\$1,490.9	174
Effective Tax Rate	2.16	2.58	144
Average Residential Property Tax Bill	\$4,121	\$5,845	172
Per Capita Income (Estimate)	\$26,909	\$32,392	143
Estimated Unemployment Rate	10.1%	8.1%	37

Estimated Poverty Rate by Year

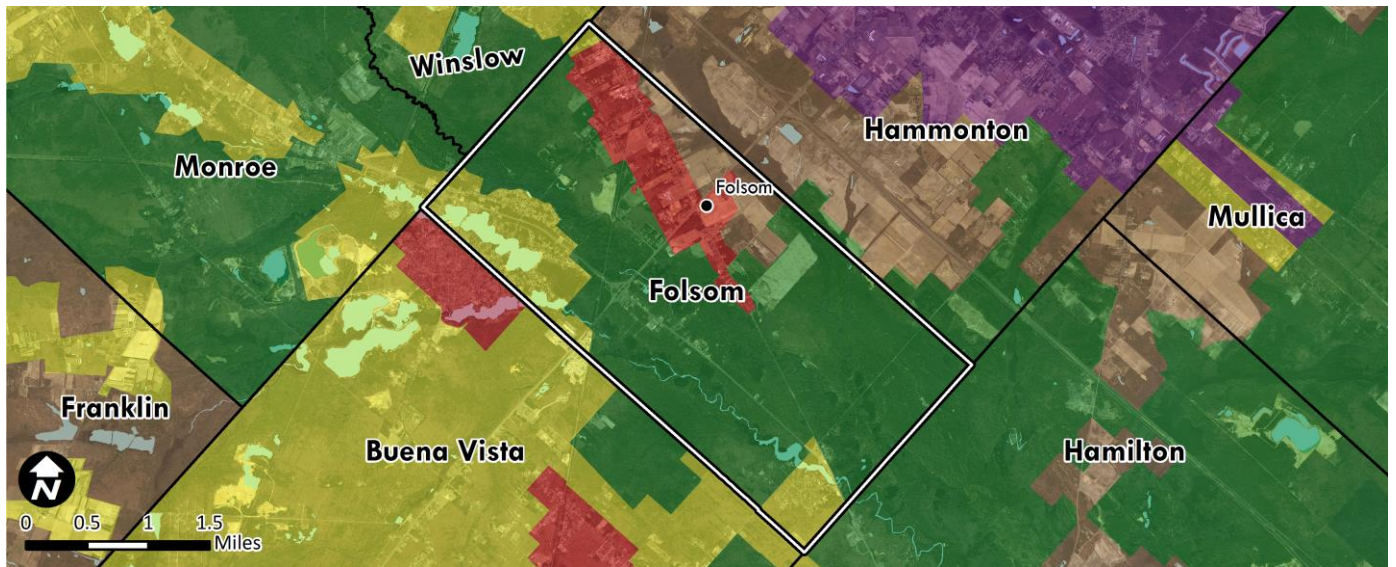


Private Sector Employment 126	Private Sector Establishments 29	Private Sector Avg. Annual Wages \$31,815
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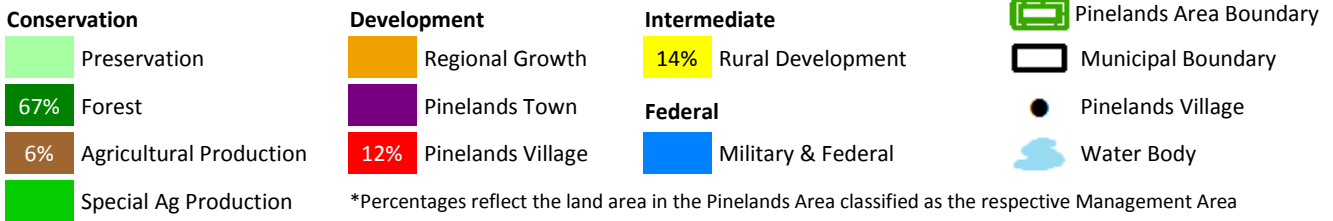
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Folsom Borough

Pinelands Area 2010 population: 1,885 (100% of total population)
 Pinelands Area acreage: 5,426 (100% of total acreage)

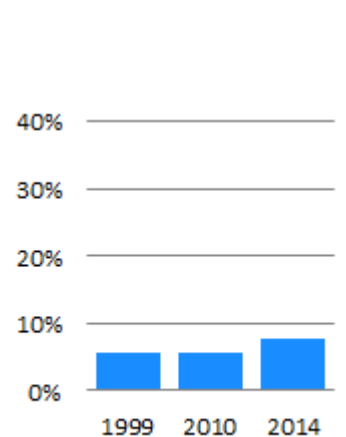


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,870	12,033	161
Population Density (per mile ²)	221	1,763	164
Population Change - 2010 to 2014	-0.8%	-0.2%	115
% Land Protected in Pinelands Area	16%	37%*	36*
Assessed Acres of Farmland	662	2,264	79
Building Permits Issued	1	37	152
Housing Transactions	8	84	166
Average Home Sale Price	\$182,500	\$286,205	125
Equalized Property Value (millions)	\$168.0	\$1,490.9	172
Effective Tax Rate	1.79	2.58	165
Average Residential Property Tax Bill	\$3,667	\$5,845	187
Per Capita Income (Estimate)	\$30,671	\$32,392	95
Estimated Unemployment Rate	10.2%	8.1%	36

Estimated Poverty Rate by Year

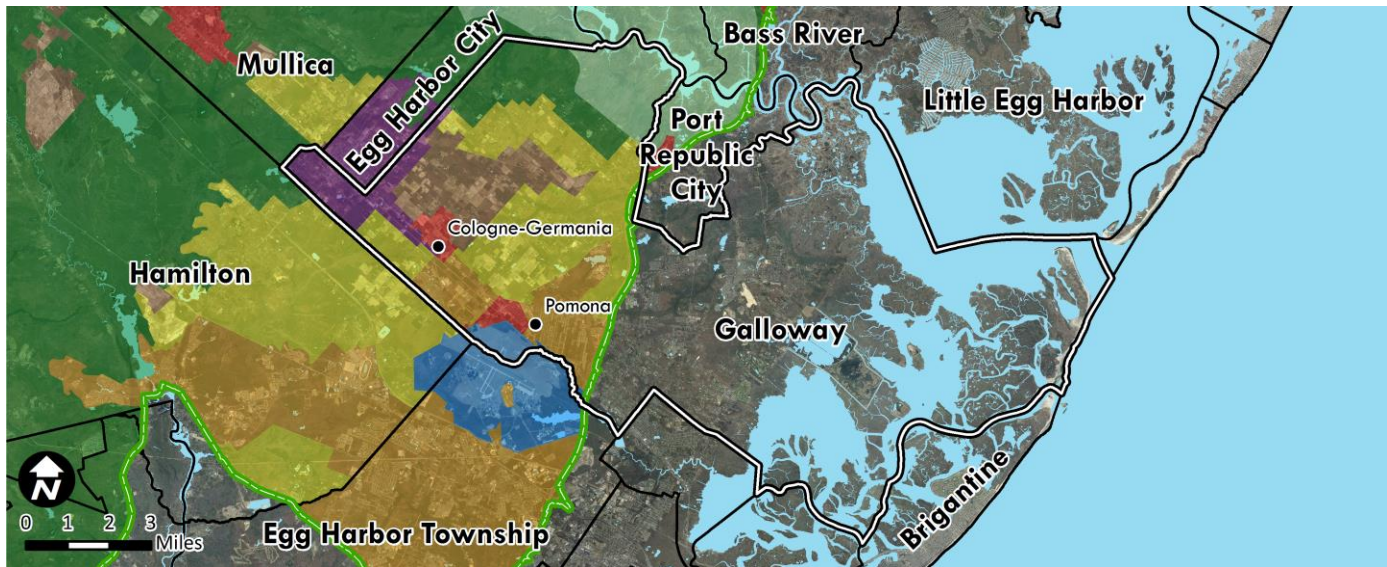


Private Sector Employment 770	Private Sector Establishments 38	Private Sector Avg. Annual Wages \$75,498
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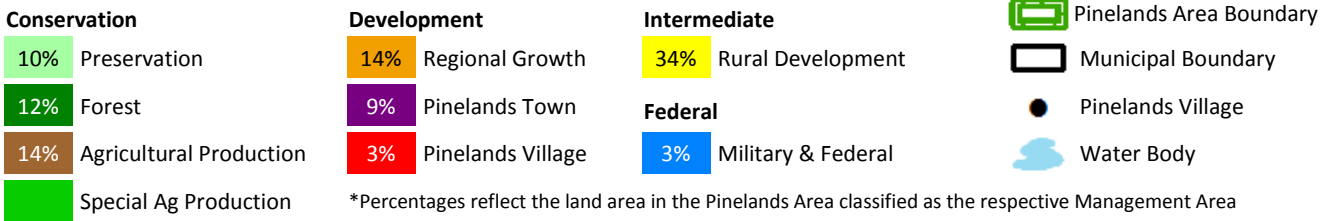
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Galloway Township

Pinelands Area 2010 population: 14,947 (40% of total population)
 Pinelands Area acreage: 27,005 (38% of total acreage)

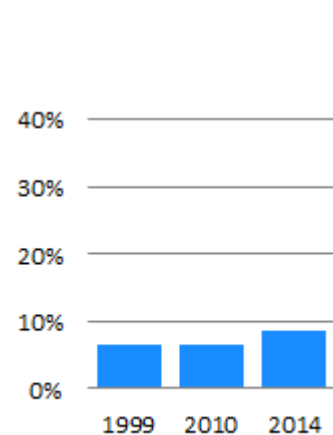


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	37,583	12,033	17
Population Density (per mile ²)	341	1,763	148
Population Change - 2010 to 2014	0.6%	-0.2%	48
% Land Protected in Pinelands Area	14%	37%*	37*
Assessed Acres of Farmland	2,521	2,264	56
Building Permits Issued	33	37	55
Housing Transactions	122	84	43
Average Home Sale Price	\$180,411	\$286,205	130
Equalized Property Value (millions)	\$2,997.6	\$1,490.9	29
Effective Tax Rate	2.79	2.58	74
Average Residential Property Tax Bill	\$4,923	\$5,845	129
Per Capita Income (Estimate)	\$28,349	\$32,392	123
Estimated Unemployment Rate	9.5%	8.1%	51

Estimated Poverty Rate by Year

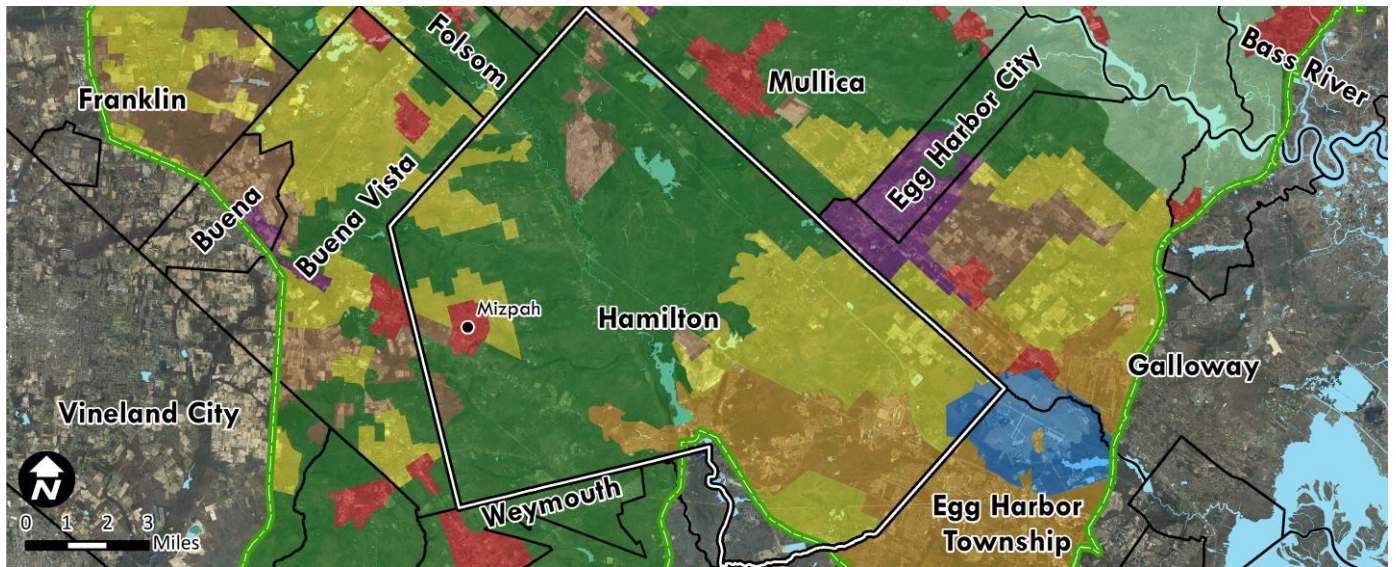


Private Sector Employment 8,072	Private Sector Establishments 498	Private Sector Avg. Annual Wages \$42,627
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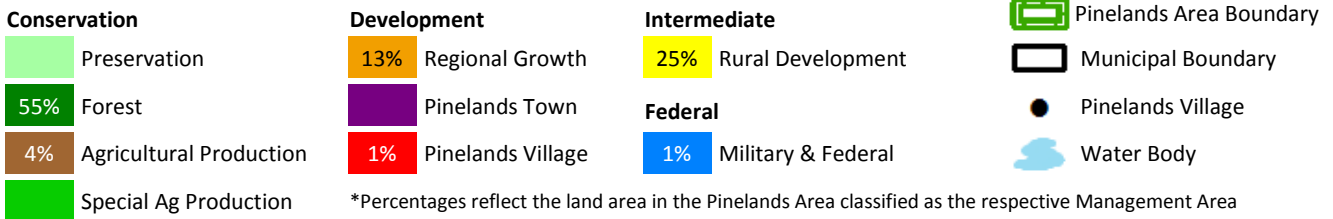
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Hamilton Township

Pinelands Area 2010 population: 24,954 (94% of total population)
 Pinelands Area acreage: 70,065 (97% of total acreage)

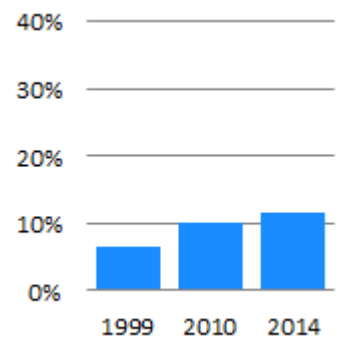


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	26,647	12,033	27
Population Density (per mile ²)	236	1,763	159
Population Change - 2010 to 2014	0.5%	-0.2%	50
% Land Protected in Pinelands Area	36%	37%*	25*
Assessed Acres of Farmland	5,972	2,264	33
Building Permits Issued	14	37	79
Housing Transactions	132	84	39
Average Home Sale Price	\$191,708	\$286,205	116
Equalized Property Value (millions)	\$2,299.1	\$1,490.9	40
Effective Tax Rate	2.61	2.58	104
Average Residential Property Tax Bill	\$4,664	\$5,845	145
Per Capita Income (Estimate)	\$24,542	\$32,392	165
Estimated Unemployment Rate	9.6%	8.1%	46

Estimated Poverty Rate by Year

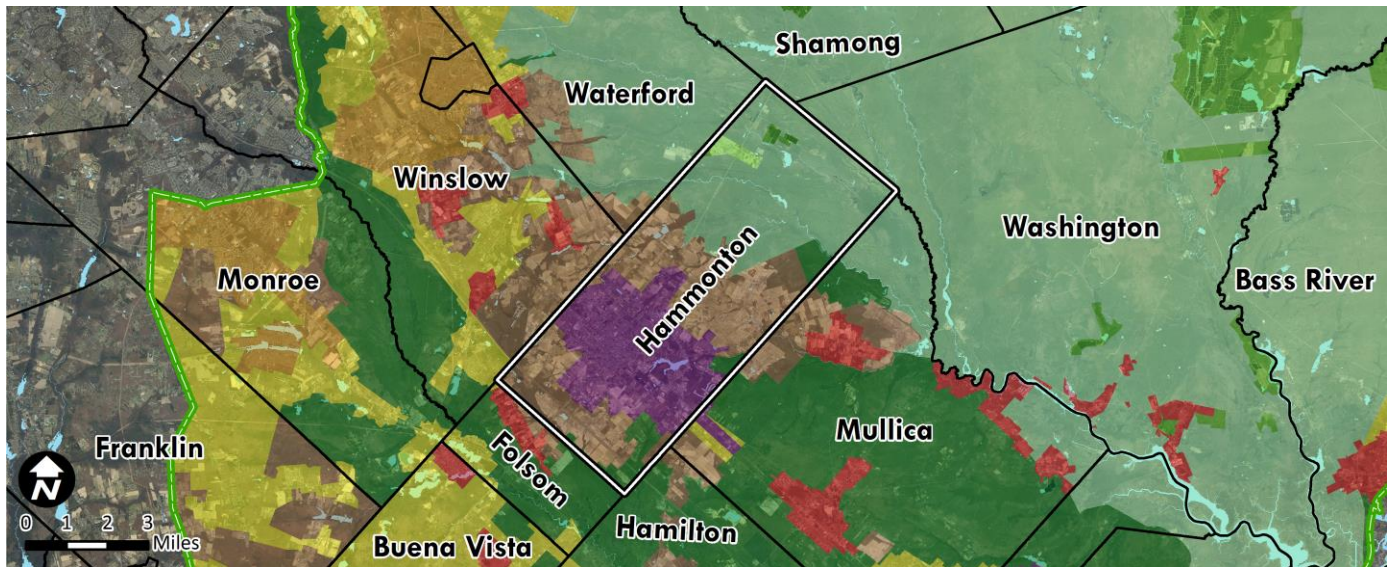


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
7,473	506	\$28,340

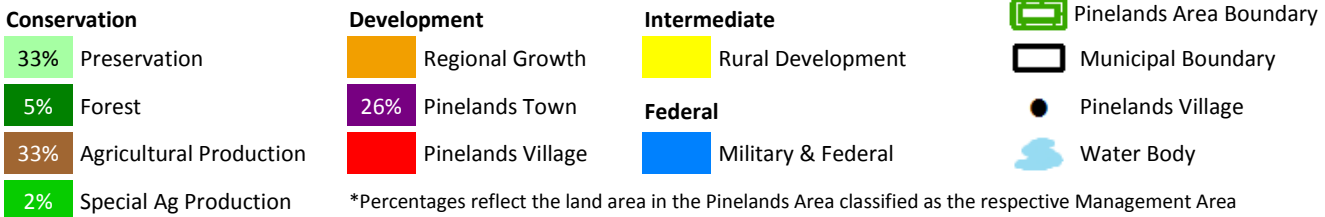
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Hammonton Town

Pinelands Area 2010 population: 14,791 (100% of total population)
 Pinelands Area acreage: 26,581 (100% of total acreage)

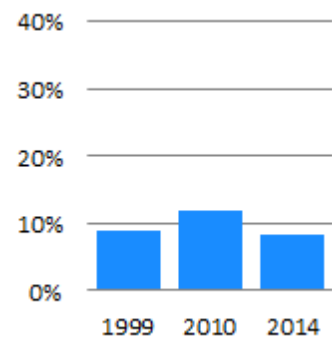


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	14,765	12,033	46
Population Density (per mile ²)	356	1,763	147
Population Change - 2010 to 2014	-0.2%	-0.2%	81
% Land Protected in Pinelands Area	49%	37%*	21*
Assessed Acres of Farmland	6,600	2,264	29
Building Permits Issued	6	37	119
Housing Transactions	89	84	60
Average Home Sale Price	\$207,783	\$286,205	103
Equalized Property Value (millions)	\$1,317.8	\$1,490.9	65
Effective Tax Rate	2.45	2.58	119
Average Residential Property Tax Bill	\$5,070	\$5,845	119
Per Capita Income (Estimate)	\$25,020	\$32,392	163
Estimated Unemployment Rate	8.3%	8.1%	80

Estimated Poverty Rate by Year



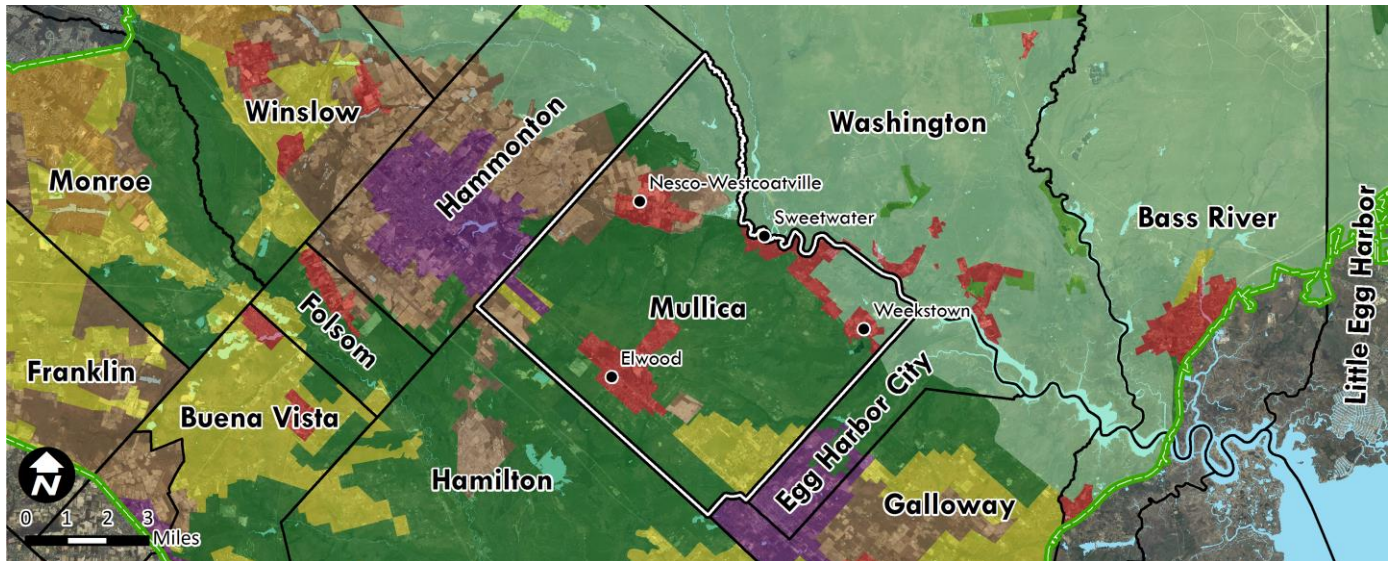
Private Sector Employment 7,463	Private Sector Establishments 584	Private Sector Avg. Annual Wages \$41,339
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

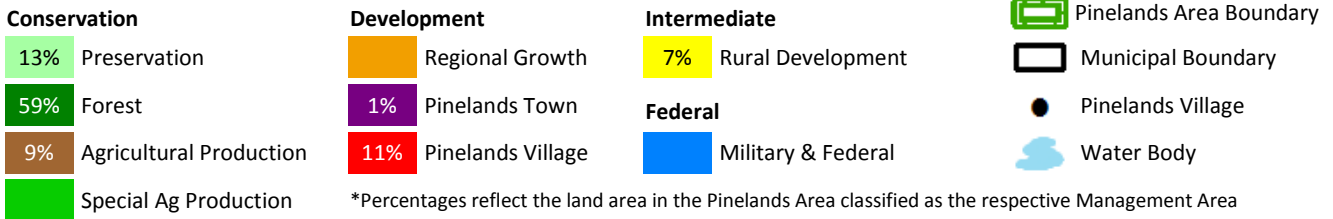
Mullica Township



Pinelands Area 2010 population: 6,147 (100% of total population)
 Pinelands Area acreage: 36,406 (100% of total acreage)

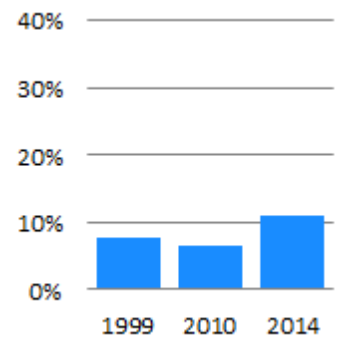


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,155	12,033	102
Population Density (per mile ²)	108	1,763	181
Population Change - 2010 to 2014	0.1%	-0.2%	65
% Land Protected in Pinelands Area	31%	37%*	29*
Assessed Acres of Farmland	6,175	2,264	32
Building Permits Issued	18	37	70
Housing Transactions	27	84	115
Average Home Sale Price	\$208,578	\$286,205	102
Equalized Property Value (millions)	\$475.7	\$1,490.9	117
Effective Tax Rate	2.48	2.58	116
Average Residential Property Tax Bill	\$4,821	\$5,845	135
Per Capita Income (Estimate)	\$26,518	\$32,392	148
Estimated Unemployment Rate	11.3%	8.1%	19

Estimated Poverty Rate by Year

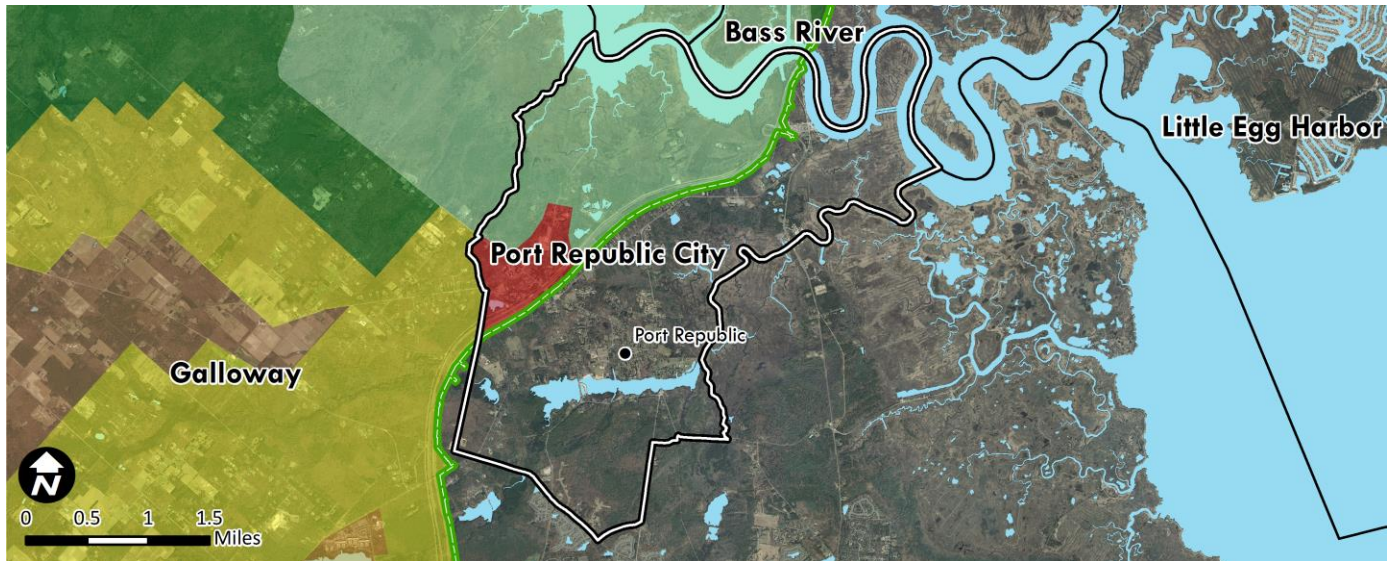


Private Sector Employment 123	Private Sector Establishments 29	Private Sector Avg. Annual Wages \$28,755
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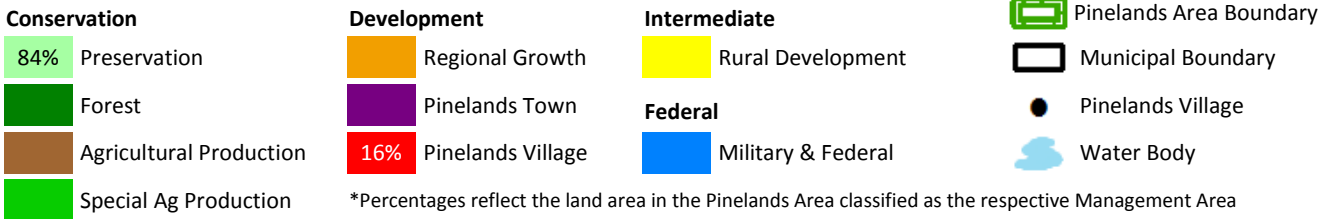
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Port Republic City

Pinelands Area 2010 population: 88 (8% of total population)
 Pinelands Area acreage: 1,952 (36% of total acreage)

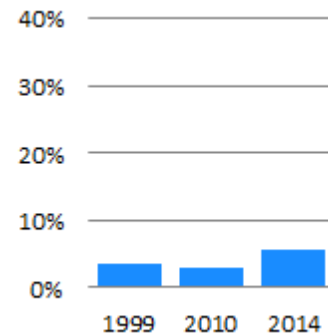


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,121	12,033	182
Population Density (per mile ²)	132	1,763	177
Population Change - 2010 to 2014	0.5%	-0.2%	51
% Land Protected in Pinelands Area	37%	37%*	32*
Assessed Acres of Farmland	136	2,264	101
Building Permits Issued	2	37	143
Housing Transactions	5	84	177
Average Home Sale Price	\$205,098	\$286,205	105
Equalized Property Value (millions)	\$132.1	\$1,490.9	181
Effective Tax Rate	2.17	2.58	143
Average Residential Property Tax Bill	\$5,642	\$5,845	90
Per Capita Income (Estimate)	\$32,235	\$32,392	81
Estimated Unemployment Rate	8.3%	8.1%	78

Estimated Poverty Rate by Year

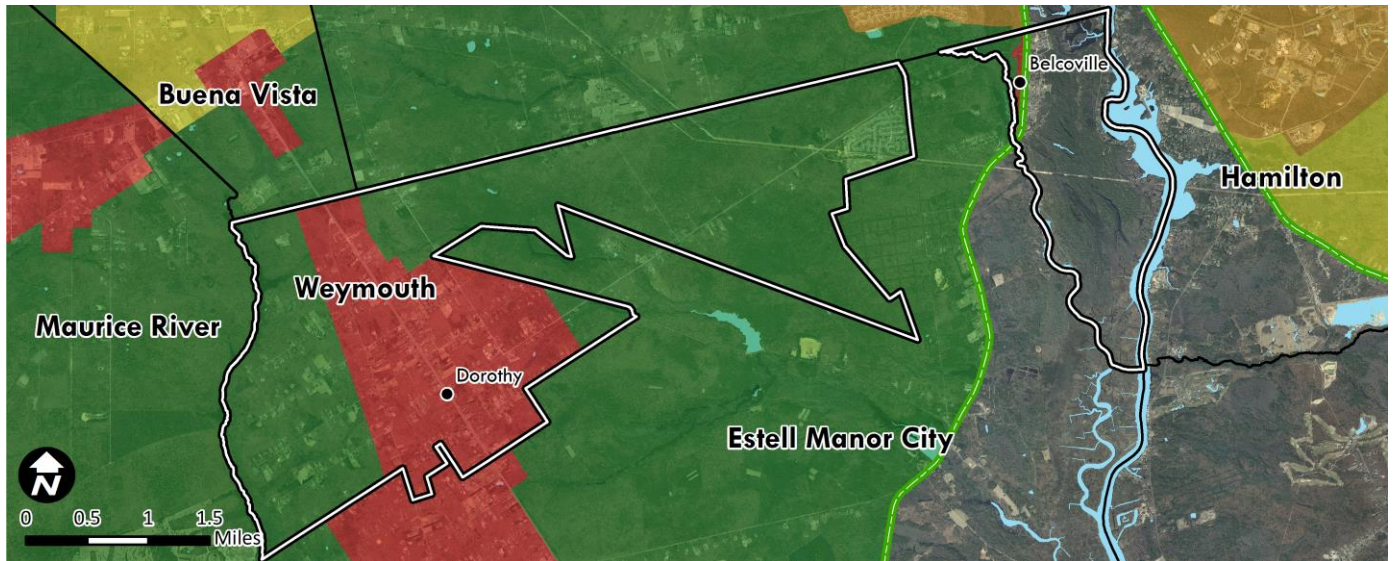


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
27	14	\$23,625

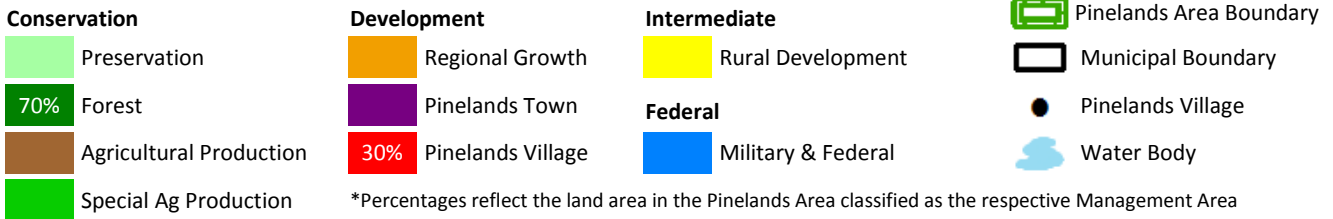
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Weymouth Township

Pinelands Area 2010 population: 2,086 (77% of total population)
 Pinelands Area acreage: 6,383 (83% of total acreage)

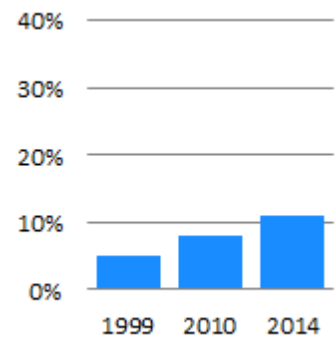


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,711	12,033	149
Population Density (per mile ²)	225	1,763	163
Population Change - 2010 to 2014	-0.1%	-0.2%	79
% Land Protected in Pinelands Area	8%	37%*	40*
Assessed Acres of Farmland	23	2,264	113
Building Permits Issued	4	37	129
Housing Transactions	5	84	177
Average Home Sale Price	\$197,100	\$286,205	110
Equalized Property Value (millions)	\$161.6	\$1,490.9	175
Effective Tax Rate	2.22	2.58	134
Average Residential Property Tax Bill	\$4,400	\$5,845	159
Per Capita Income (Estimate)	\$28,690	\$32,392	115
Estimated Unemployment Rate	9.1%	8.1%	58

Estimated Poverty Rate by Year



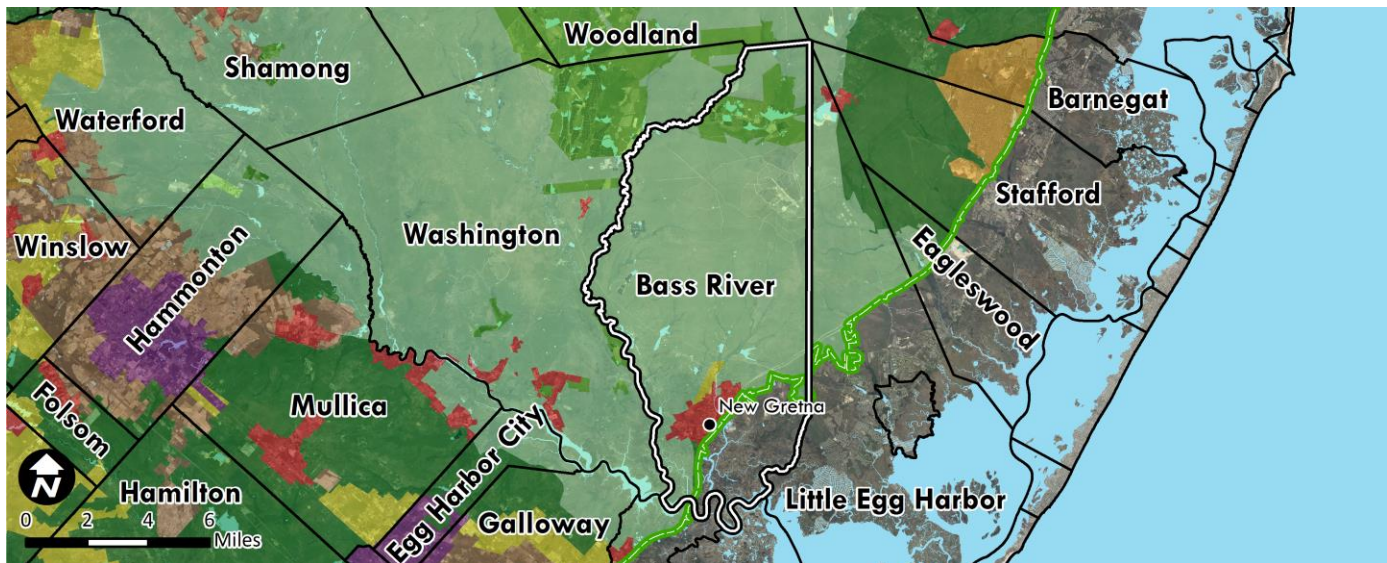
Private Sector Employment 124	Private Sector Establishments 23	Private Sector Avg. Annual Wages \$31,384
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

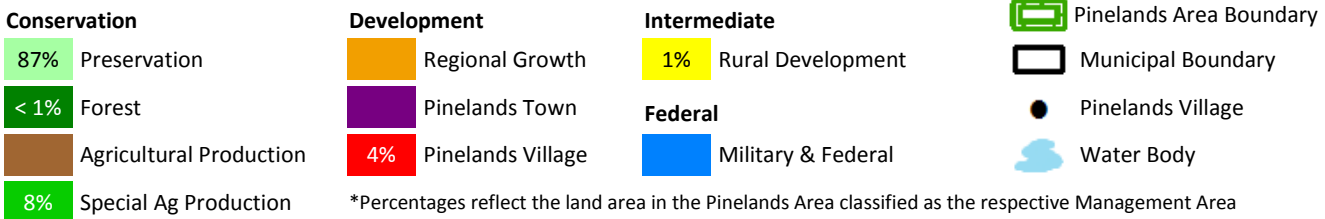
Bass River Township



Pinelands Area 2010 population: 1,172 (81% of total population)
 Pinelands Area acreage: 43,791 (87% of total acreage)

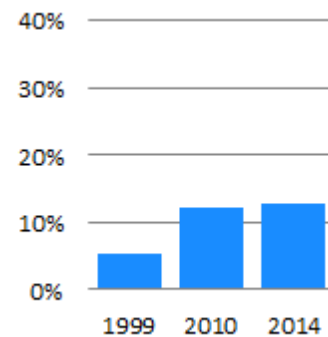


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,442	12,033	174
Population Density (per mile ²)	18	1,763	199
Population Change - 2010 to 2014	-0.1%	-0.2%	76
% Land Protected in Pinelands Area	51%	37%*	18*
Assessed Acres of Farmland	6,909	2,264	24
Building Permits Issued	3	37	136
Housing Transactions	1	84	192
Average Home Sale Price	\$413,000	\$286,205	25
Equalized Property Value (millions)	\$177.6	\$1,490.9	170
Effective Tax Rate	1.85	2.58	161
Average Residential Property Tax Bill	\$4,512	\$5,845	155
Per Capita Income (Estimate)	\$30,290	\$32,392	104
Estimated Unemployment Rate	10.5%	8.1%	29

Estimated Poverty Rate by Year



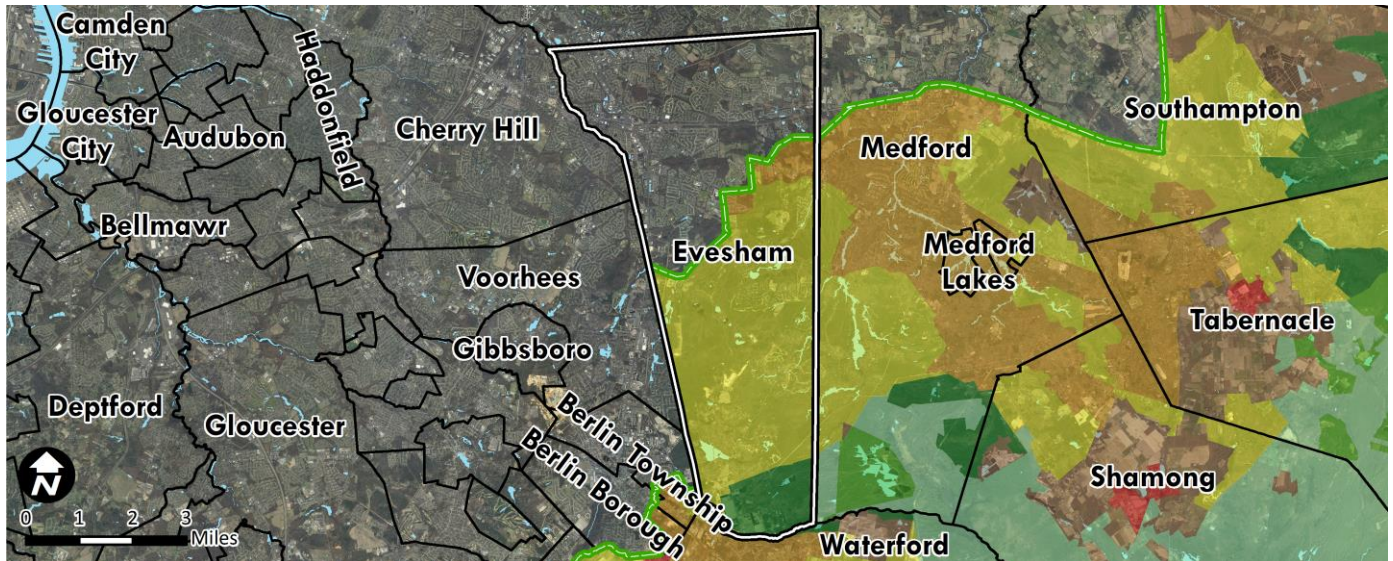
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
-	-	\$-

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

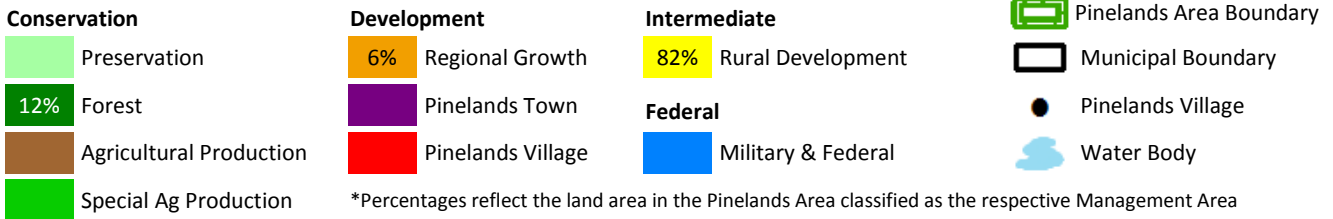
Evesham Township



Pinelands Area 2010 population: 11,860 (26% of total population)
 Pinelands Area acreage: 10,344 (55% of total acreage)

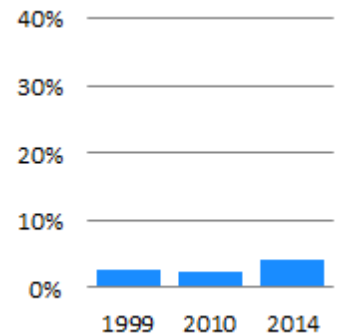


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	45,613	12,033	10
Population Density (per mile ²)	1,549	1,763	87
Population Change - 2010 to 2014	0.2%	-0.2%	63
% Land Protected in Pinelands Area	29%	37%*	31*
Assessed Acres of Farmland	2,240	2,264	60
Building Permits Issued	6	37	119
Housing Transactions	390	84	9
Average Home Sale Price	\$263,861	\$286,205	62
Equalized Property Value (millions)	\$5,108.9	\$1,490.9	11
Effective Tax Rate	2.60	2.58	106
Average Residential Property Tax Bill	\$6,823	\$5,845	48
Per Capita Income (Estimate)	\$42,644	\$32,392	28
Estimated Unemployment Rate	4.9%	8.1%	193

Estimated Poverty Rate by Year



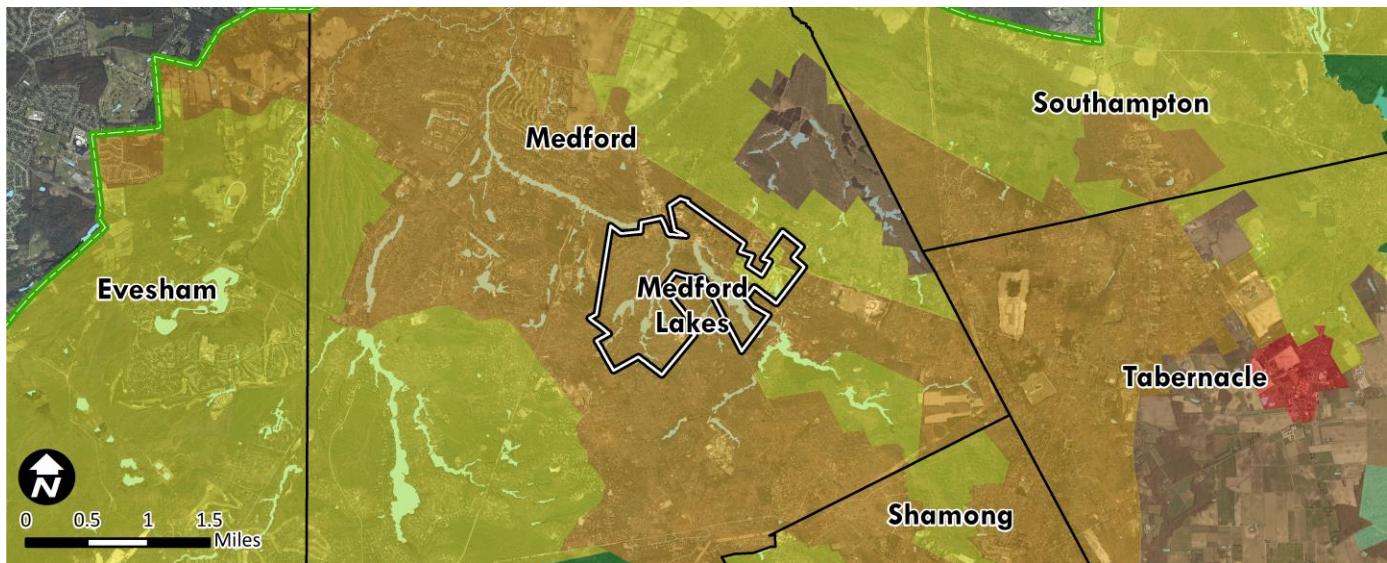
Private Sector Employment 25,799	Private Sector Establishments 1,415	Private Sector Avg. Annual Wages \$50,590
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

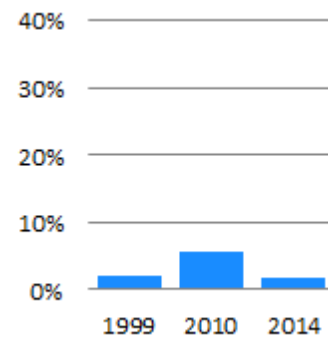
- 10% Rural Development
- Federal**
- Military & Federal

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

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,110	12,033	124
Population Density (per mile ²)	3,240	1,763	42
Population Change - 2010 to 2014	-0.9%	-0.2%	118
% Land Protected in Pinelands Area	0%	37%*	46*
Assessed Acres of Farmland	0	2,264	123
Building Permits Issued	5	37	124
Housing Transactions	56	84	76
Average Home Sale Price	\$270,231	\$286,205	57
Equalized Property Value (millions)	\$456.3	\$1,490.9	123
Effective Tax Rate	2.86	2.58	73
Average Residential Property Tax Bill	\$8,373	\$5,845	18
Per Capita Income (Estimate)	\$47,124	\$32,392	16
Estimated Unemployment Rate	5.2%	8.1%	189

Estimated Poverty Rate by Year



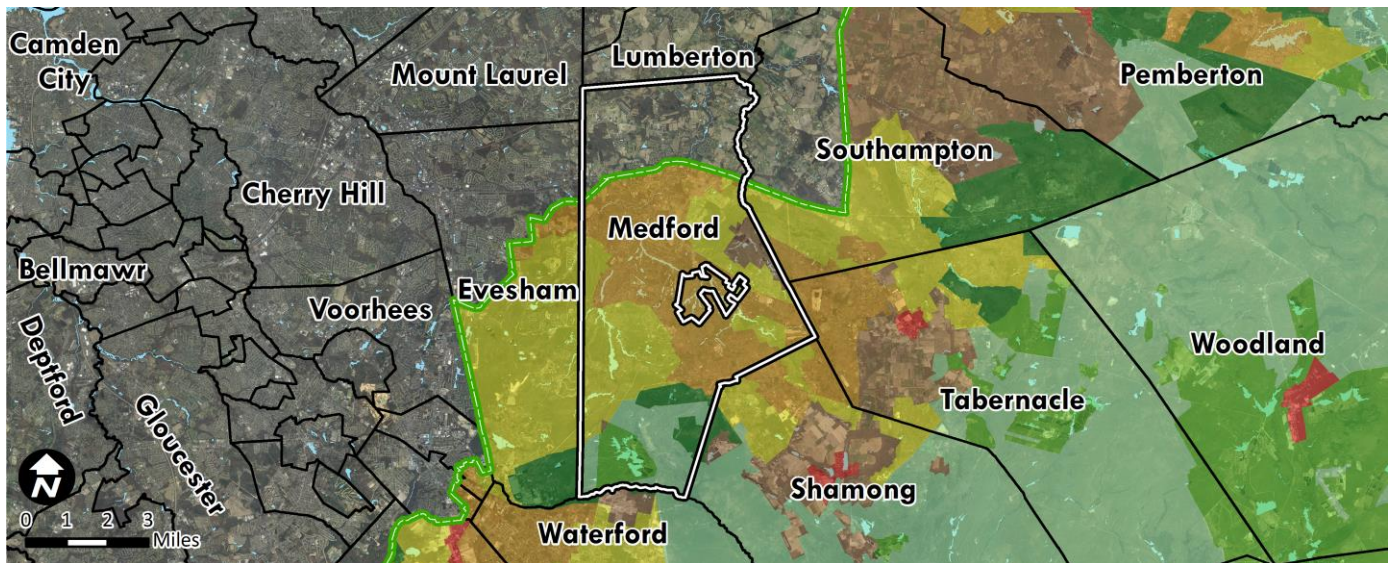
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
408	72	\$47,636

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

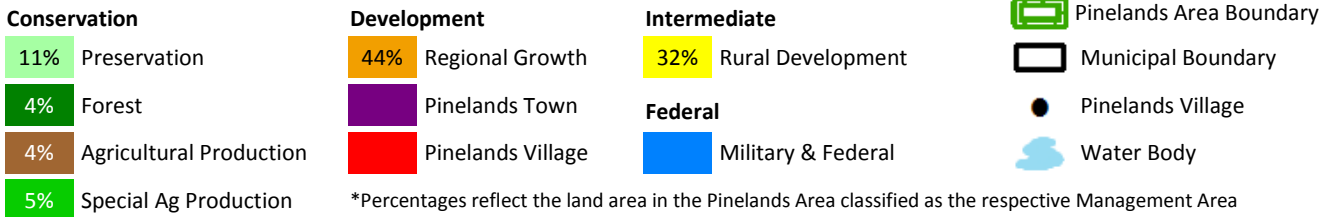
Medford Township



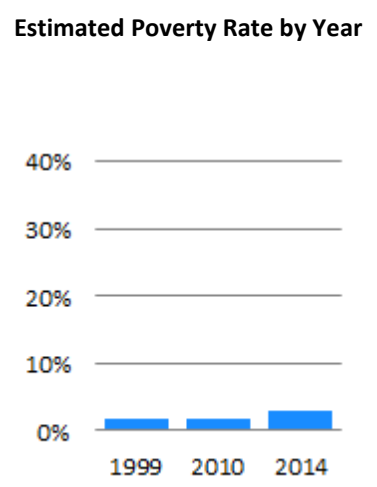
Pinelands Area 2010 population: 18,861 (82% of total population)
 Pinelands Area acreage: 19,793 (78% of total acreage)



Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	23,357	12,033	29
Population Density (per mile ²)	586	1,763	127
Population Change - 2010 to 2014	1.4%	-0.2%	33
% Land Protected in Pinelands Area	32%	37%*	28*
Assessed Acres of Farmland	5,604	2,264	35
Building Permits Issued	92	37	18
Housing Transactions	215	84	18
Average Home Sale Price	\$357,473	\$286,205	30
Equalized Property Value (millions)	\$3,123.6	\$1,490.9	28
Effective Tax Rate	2.79	2.58	75
Average Residential Property Tax Bill	\$9,729	\$5,845	9
Per Capita Income (Estimate)	\$49,226	\$32,392	12
Estimated Unemployment Rate	5.1%	8.1%	190

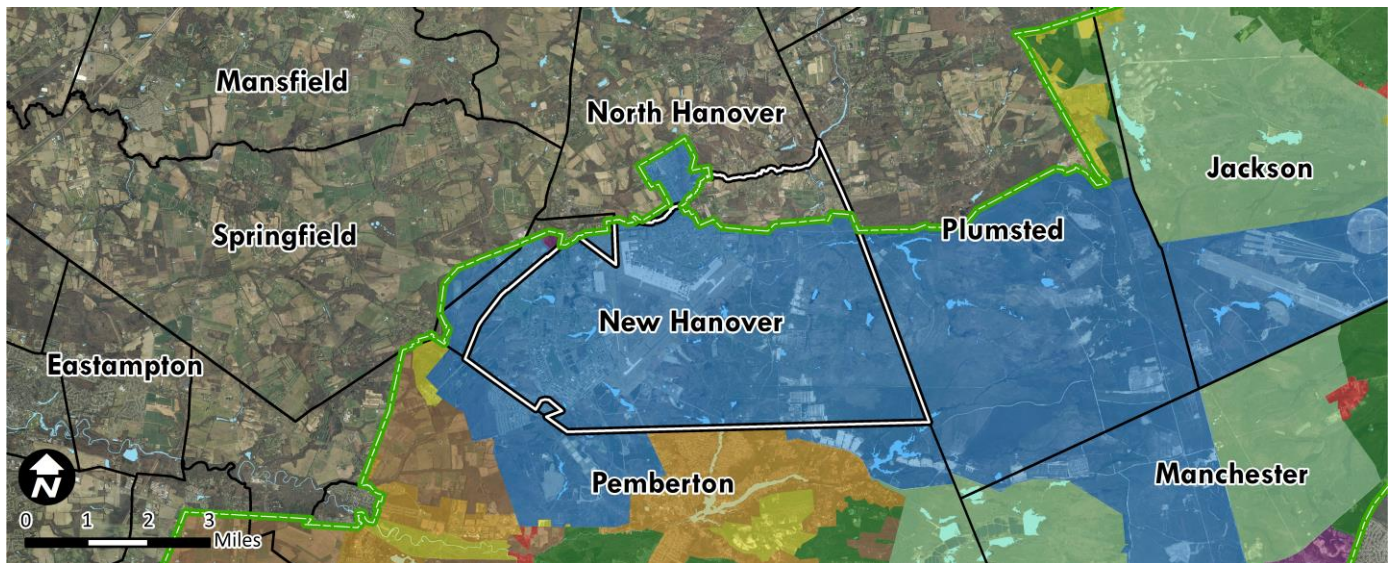


Private Sector Employment 6,535	Private Sector Establishments 748	Private Sector Avg. Annual Wages \$37,749
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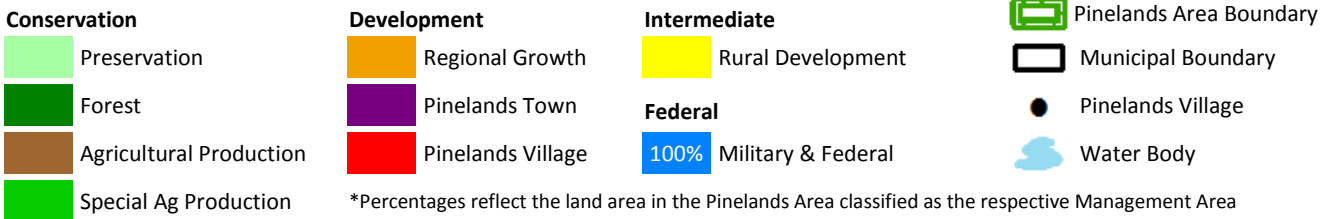
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

New Hanover Township

Pinelands Area 2010 population: 6,692 (91% of total population)
 Pinelands Area acreage: 13,016 (91% of total acreage)

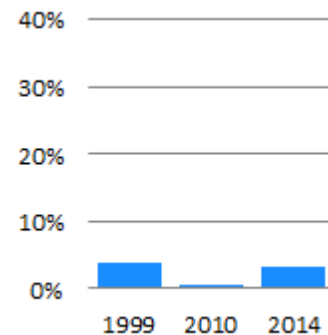


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,258	12,033	93
Population Density (per mile ²)	323	1,763	149
Population Change - 2010 to 2014	-1.7%	-0.2%	176
% Land Protected in Pinelands Area	0%	37%*	46*
Assessed Acres of Farmland	956	2,264	71
Building Permits Issued	4	37	129
Housing Transactions	6	84	173
Average Home Sale Price	\$242,750	\$286,205	74
Equalized Property Value (millions)	\$81.9	\$1,490.9	192
Effective Tax Rate	1.84	2.58	163
Average Residential Property Tax Bill	\$3,709	\$5,845	186
Per Capita Income (Estimate)	\$20,543	\$32,392	189
Estimated Unemployment Rate	9.8%	8.1%	41

Estimated Poverty Rate by Year



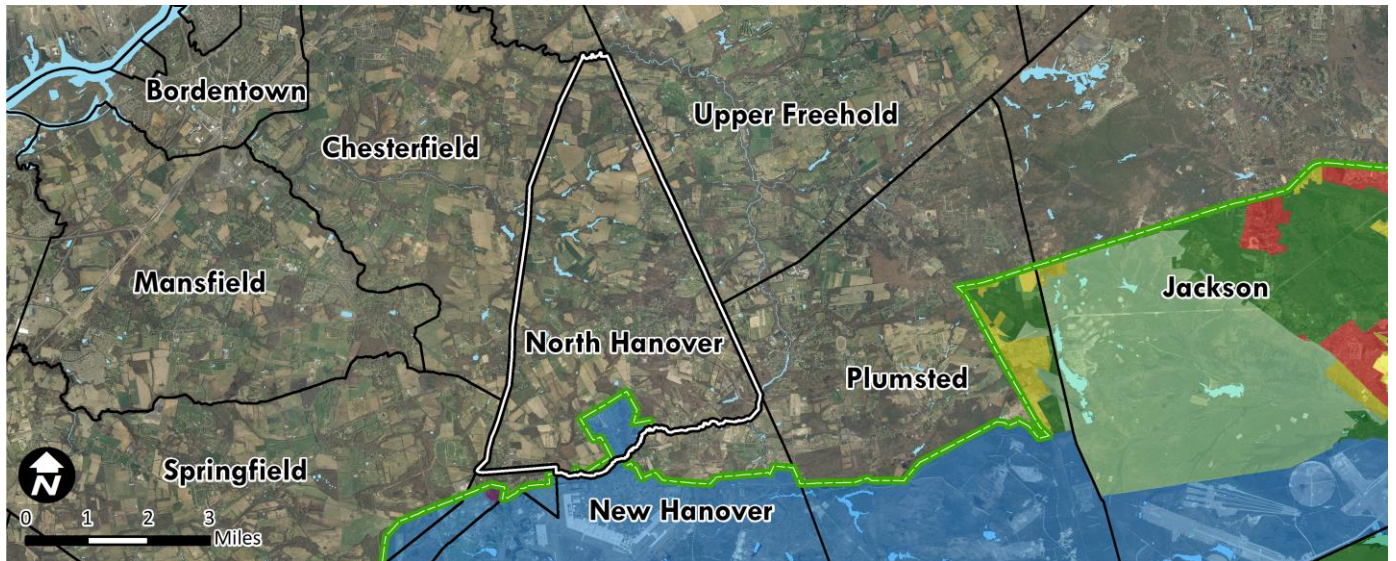
Private Sector Employment 1,131	Private Sector Establishments 121	Private Sector Avg. Annual Wages \$45,013
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

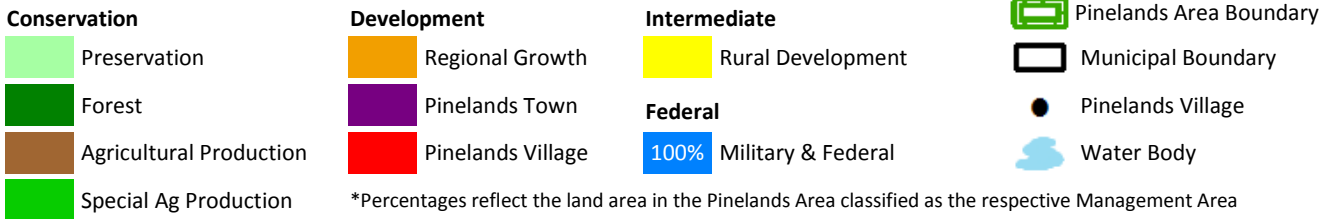
North Hanover Township



Pinelands Area 2010 population: 2,973 (39% of total population)
 Pinelands Area acreage: 477 (4% of total acreage)

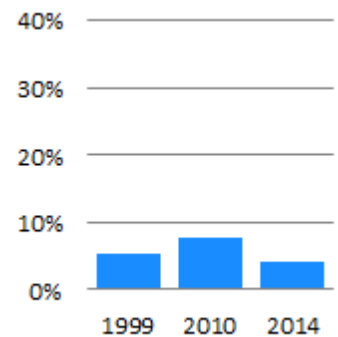


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,647	12,033	87
Population Density (per mile ²)	437	1,763	138
Population Change - 2010 to 2014	-0.4%	-0.2%	93
% Land Protected in Pinelands Area	0%	37%*	46*
Assessed Acres of Farmland	7,034	2,264	22
Building Permits Issued	14	37	79
Housing Transactions	13	84	147
Average Home Sale Price	\$287,946	\$286,205	47
Equalized Property Value (millions)	\$399.5	\$1,490.9	129
Effective Tax Rate	2.00	2.58	155
Average Residential Property Tax Bill	\$6,198	\$5,845	71
Per Capita Income (Estimate)	\$27,195	\$32,392	136
Estimated Unemployment Rate	7.1%	8.1%	124

Estimated Poverty Rate by Year



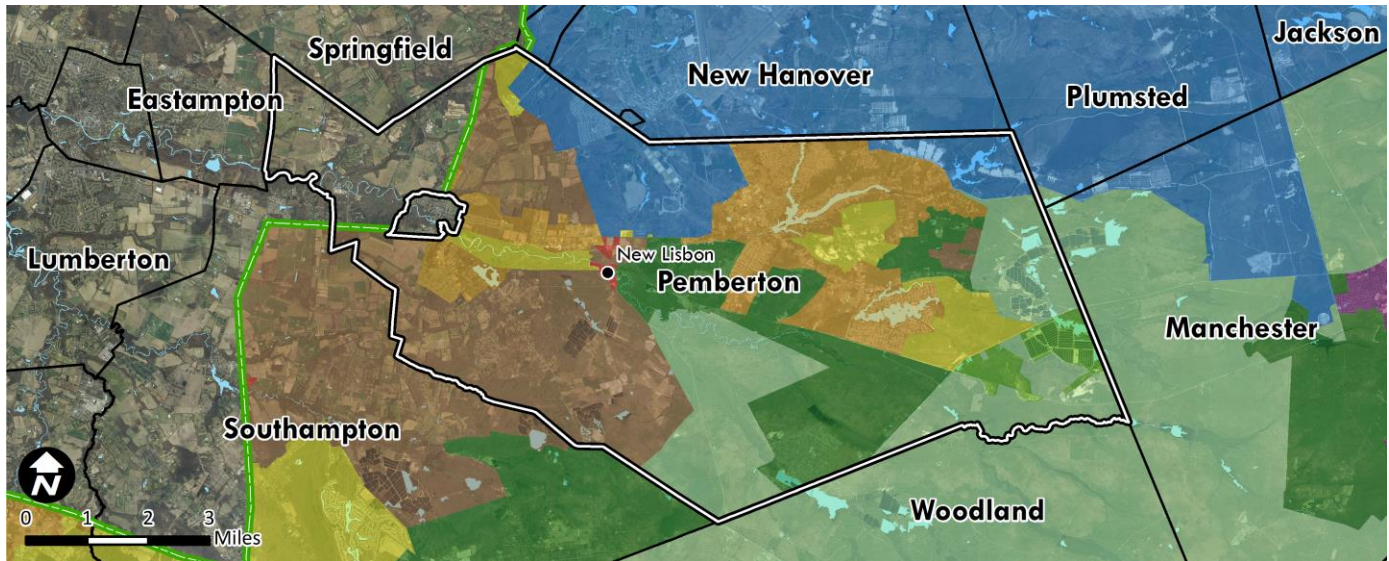
Private Sector Employment 371	Private Sector Establishments 71	Private Sector Avg. Annual Wages \$50,767
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

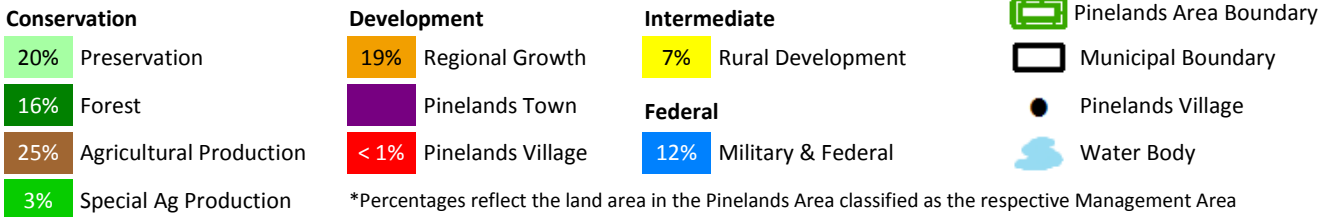
Pemberton Township



Pinelands Area 2010 population: 27,394 (98% of total population)
 Pinelands Area acreage: 36,722 (91% of total acreage)

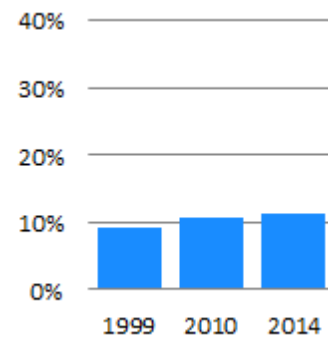


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	27,822	12,033	25
Population Density (per mile ²)	443	1,763	137
Population Change - 2010 to 2014	-0.3%	-0.2%	87
% Land Protected in Pinelands Area	41%	37%*	24*
Assessed Acres of Farmland	9,254	2,264	15
Building Permits Issued	7	37	113
Housing Transactions	124	84	42
Average Home Sale Price	\$166,564	\$286,205	145
Equalized Property Value (millions)	\$1,458.0	\$1,490.9	57
Effective Tax Rate	2.12	2.58	149
Average Residential Property Tax Bill	\$3,436	\$5,845	192
Per Capita Income (Estimate)	\$25,626	\$32,392	159
Estimated Unemployment Rate	8.8%	8.1%	66

Estimated Poverty Rate by Year



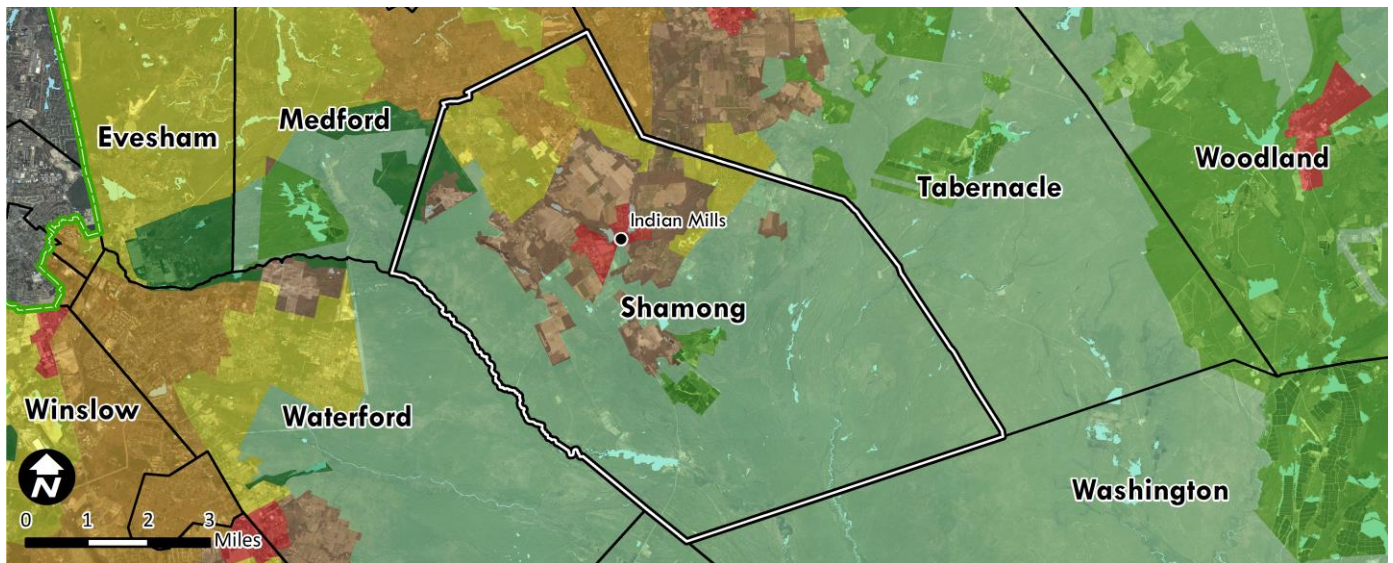
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
2,410	208	\$46,989

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

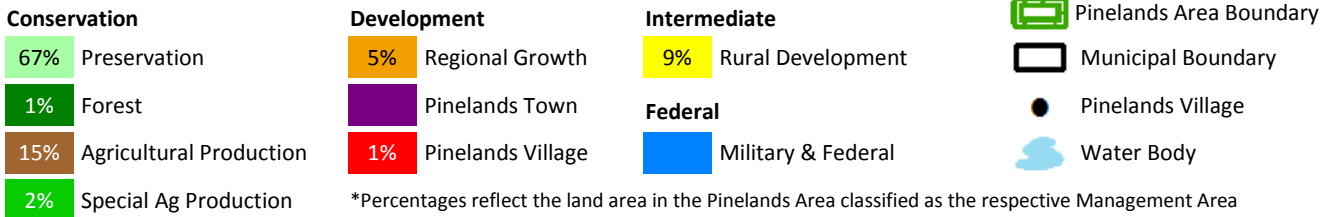
Shamong Township



Pinelands Area 2010 population: 6,490 (100% of total population)
 Pinelands Area acreage: 28,706 (100% of total acreage)

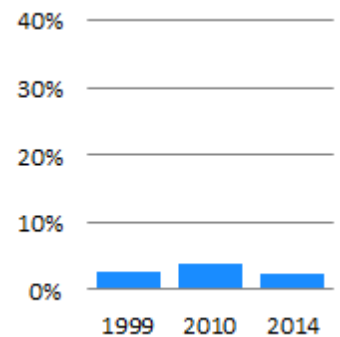


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,432	12,033	99
Population Density (per mile ²)	143	1,763	175
Population Change - 2010 to 2014	-0.9%	-0.2%	124
% Land Protected in Pinelands Area	63%	37%*	13*
Assessed Acres of Farmland	4,692	2,264	42
Building Permits Issued	13	37	86
Housing Transactions	51	84	87
Average Home Sale Price	\$338,591	\$286,205	33
Equalized Property Value (millions)	\$710.3	\$1,490.9	98
Effective Tax Rate	2.39	2.58	122
Average Residential Property Tax Bill	\$7,723	\$5,845	25
Per Capita Income (Estimate)	\$43,778	\$32,392	23
Estimated Unemployment Rate	5.5%	8.1%	177

Estimated Poverty Rate by Year

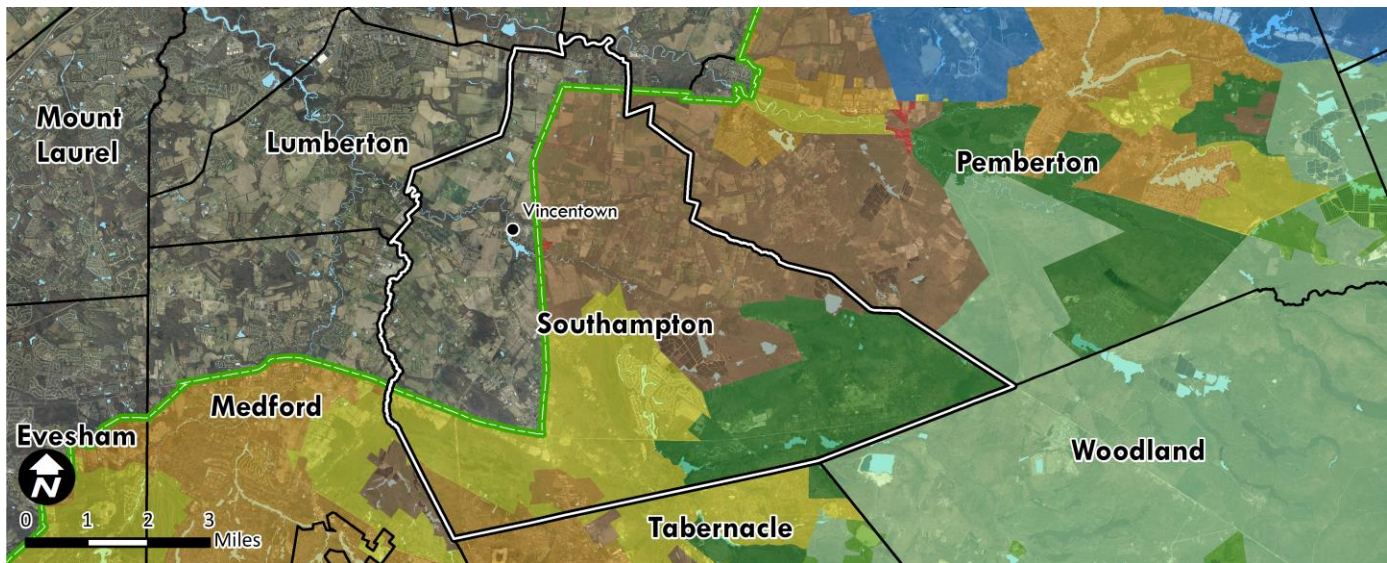


Private Sector Employment 888	Private Sector Establishments 128	Private Sector Avg. Annual Wages \$41,870
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

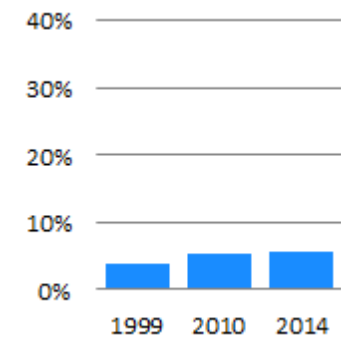
- 28% Rural Development
- Federal**
- Military & Federal

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

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	10,362	12,033	65
Population Density (per mile ²)	233	1,763	160
Population Change - 2010 to 2014	-1.0%	-0.2%	128
% Land Protected in Pinelands Area	33%	37%*	27*
Assessed Acres of Farmland	14,621	2,264	4
Building Permits Issued	12	37	92
Housing Transactions	148	84	30
Average Home Sale Price	\$187,290	\$286,205	120
Equalized Property Value (millions)	\$1,077.8	\$1,490.9	79
Effective Tax Rate	2.37	2.58	123
Average Residential Property Tax Bill	\$4,932	\$5,845	128
Per Capita Income (Estimate)	\$34,557	\$32,392	67
Estimated Unemployment Rate	7.7%	8.1%	103

Estimated Poverty Rate by Year



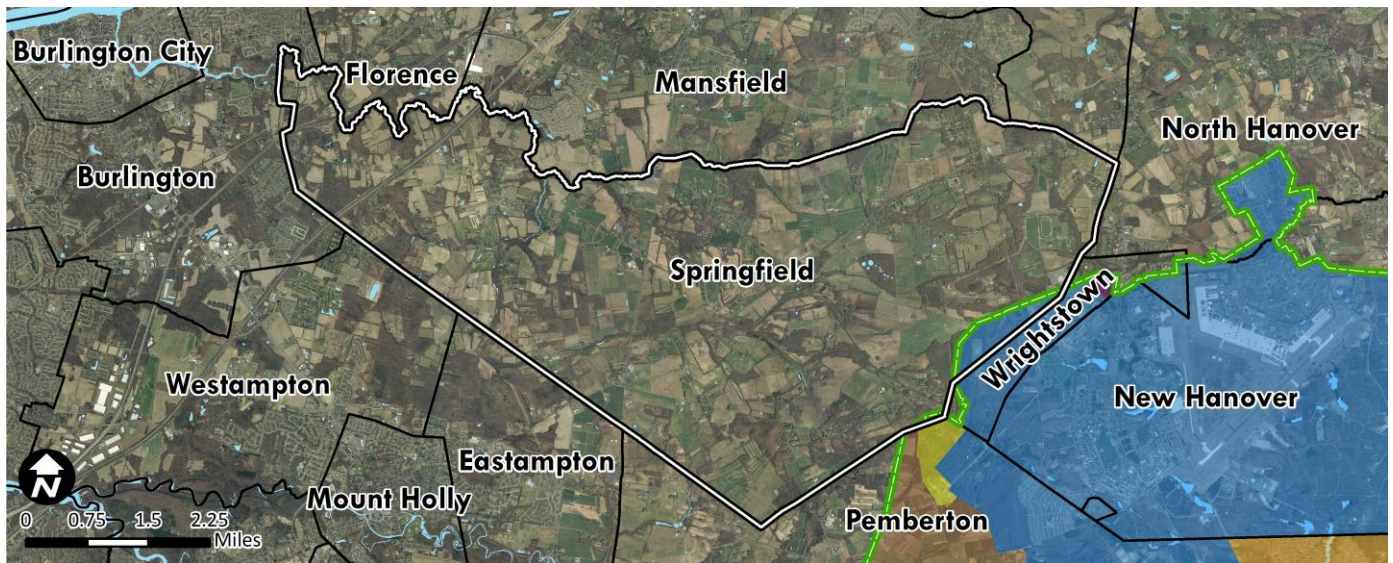
Private Sector Employment 2,345	Private Sector Establishments 235	Private Sector Avg. Annual Wages \$37,679
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

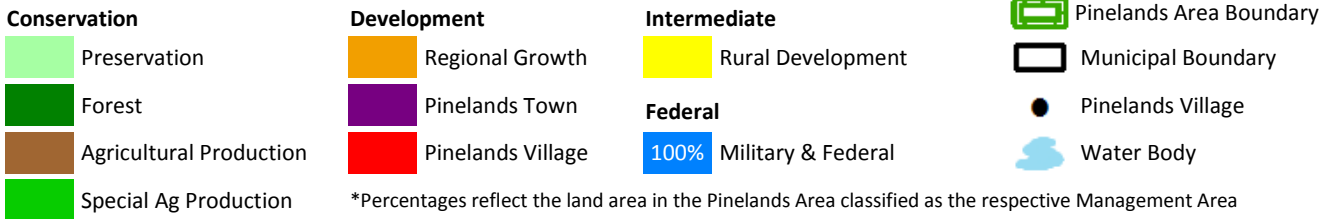
Springfield Township



Pinelands Area 2010 population: 0 (0% of total population)
 Pinelands Area acreage: 284 (1% of total acreage)

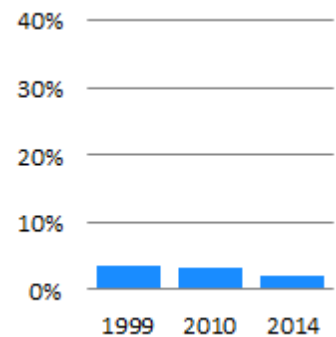


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	3,387	12,033	136
Population Density (per mile ²)	114	1,763	179
Population Change - 2010 to 2014	-0.8%	-0.2%	113
% Land Protected in Pinelands Area	0%	37%*	46*
Assessed Acres of Farmland	12,105	2,264	10
Building Permits Issued	4	37	129
Housing Transactions	4	84	180
Average Home Sale Price	\$323,875	\$286,205	37
Equalized Property Value (millions)	\$394.9	\$1,490.9	131
Effective Tax Rate	2.61	2.58	103
Average Residential Property Tax Bill	\$7,435	\$5,845	31
Per Capita Income (Estimate)	\$41,926	\$32,392	32
Estimated Unemployment Rate	6.0%	8.1%	166

Estimated Poverty Rate by Year



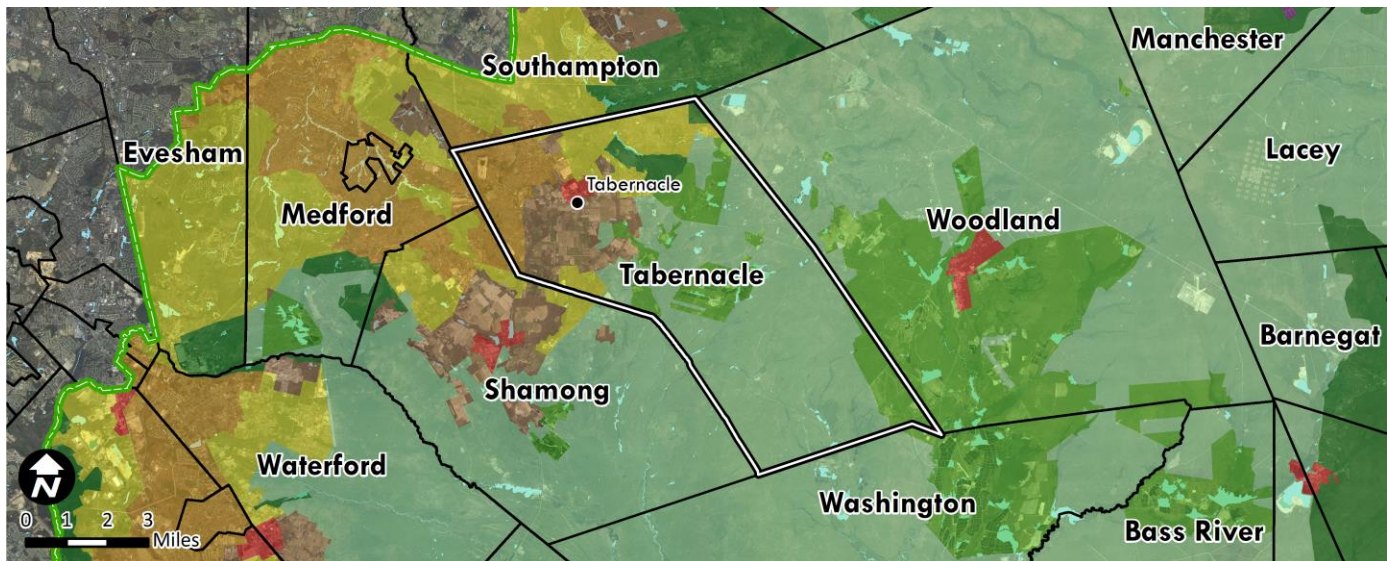
Private Sector Employment 262	Private Sector Establishments 41	Private Sector Avg. Annual Wages \$39,592
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

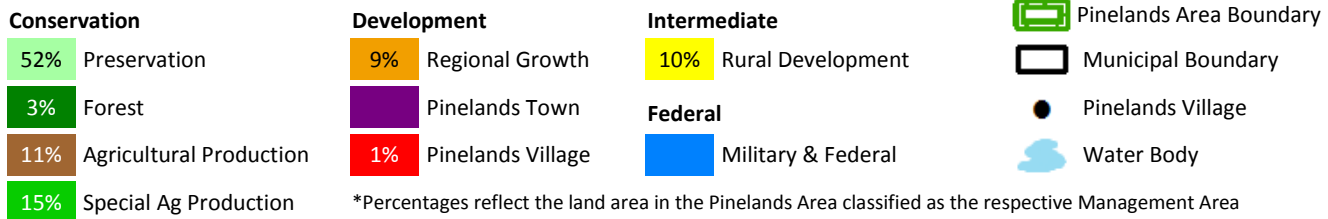
Tabernacle Township



Pinelands Area 2010 population: 6,949 (100% of total population)
 Pinelands Area acreage: 31,495 (100% of total acreage)

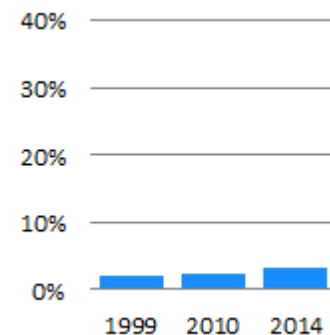


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,954	12,033	95
Population Density (per mile ²)	141	1,763	176
Population Change - 2010 to 2014	0.1%	-0.2%	68
% Land Protected in Pinelands Area	49%	37%*	23*
Assessed Acres of Farmland	9,473	2,264	13
Building Permits Issued	3	37	136
Housing Transactions	15	84	143
Average Home Sale Price	\$302,167	\$286,205	44
Equalized Property Value (millions)	\$708.4	\$1,490.9	99
Effective Tax Rate	2.44	2.58	120
Average Residential Property Tax Bill	\$6,802	\$5,845	52
Per Capita Income (Estimate)	\$41,911	\$32,392	33
Estimated Unemployment Rate	5.8%	8.1%	170

Estimated Poverty Rate by Year



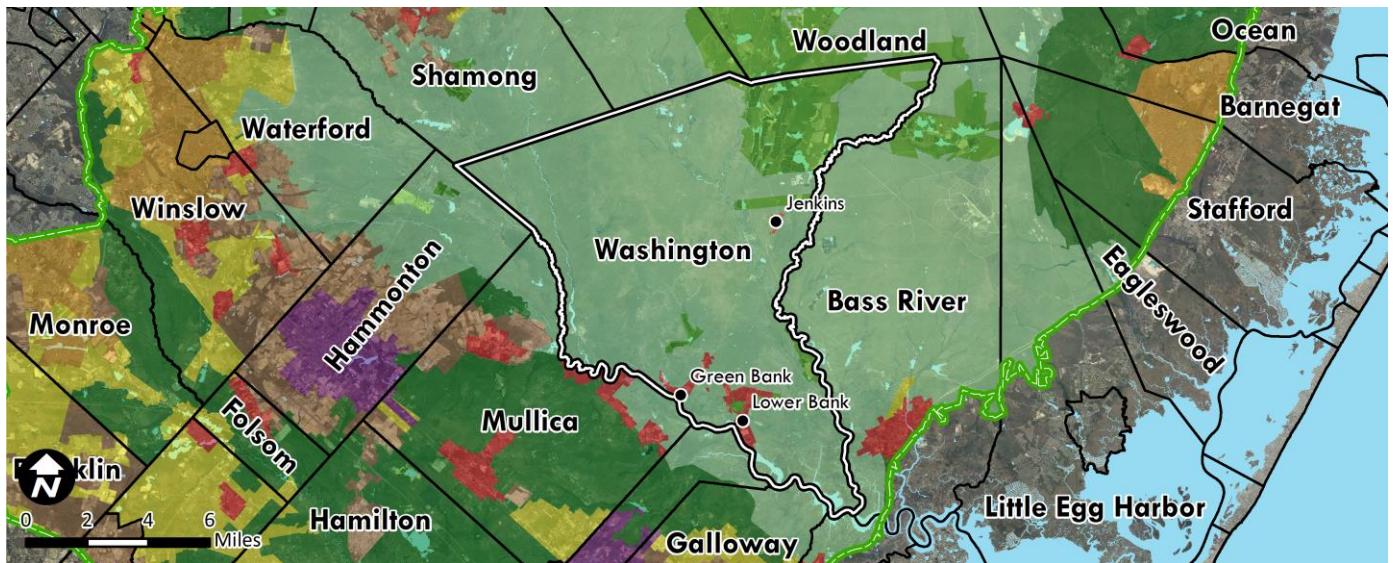
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
721	143	\$32,135

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

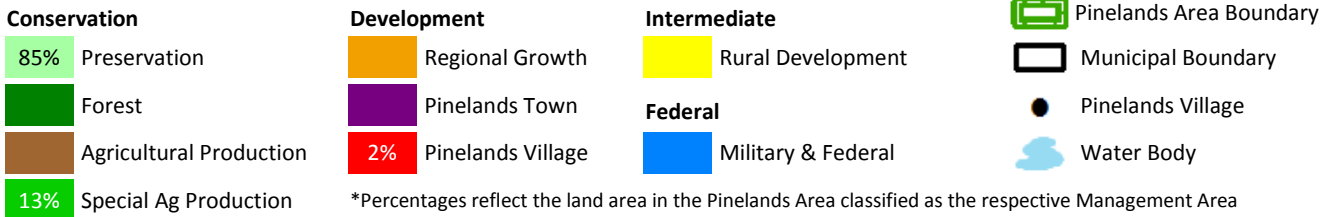
Washington Township



Pinelands Area 2010 population: 687 (100% of total population)
 Pinelands Area acreage: 66,774 (100% of total acreage)

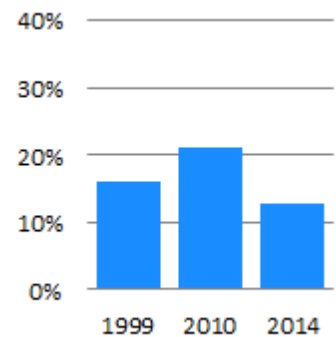


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	673	12,033	192
Population Density (per mile ²)	6	1,763	202
Population Change - 2010 to 2014	-2.0%	-0.2%	180
% Land Protected in Pinelands Area	88%	37%*	1*
Assessed Acres of Farmland	8,552	2,264	18
Building Permits Issued	3	37	136
Housing Transactions	0	84	196
Average Home Sale Price	-	\$286,205	-
Equalized Property Value (millions)	\$95.6	\$1,490.9	190
Effective Tax Rate	1.50	2.58	177
Average Residential Property Tax Bill	\$3,543	\$5,845	190
Per Capita Income (Estimate)	\$30,291	\$32,392	103
Estimated Unemployment Rate	8.7%	8.1%	67

Estimated Poverty Rate by Year



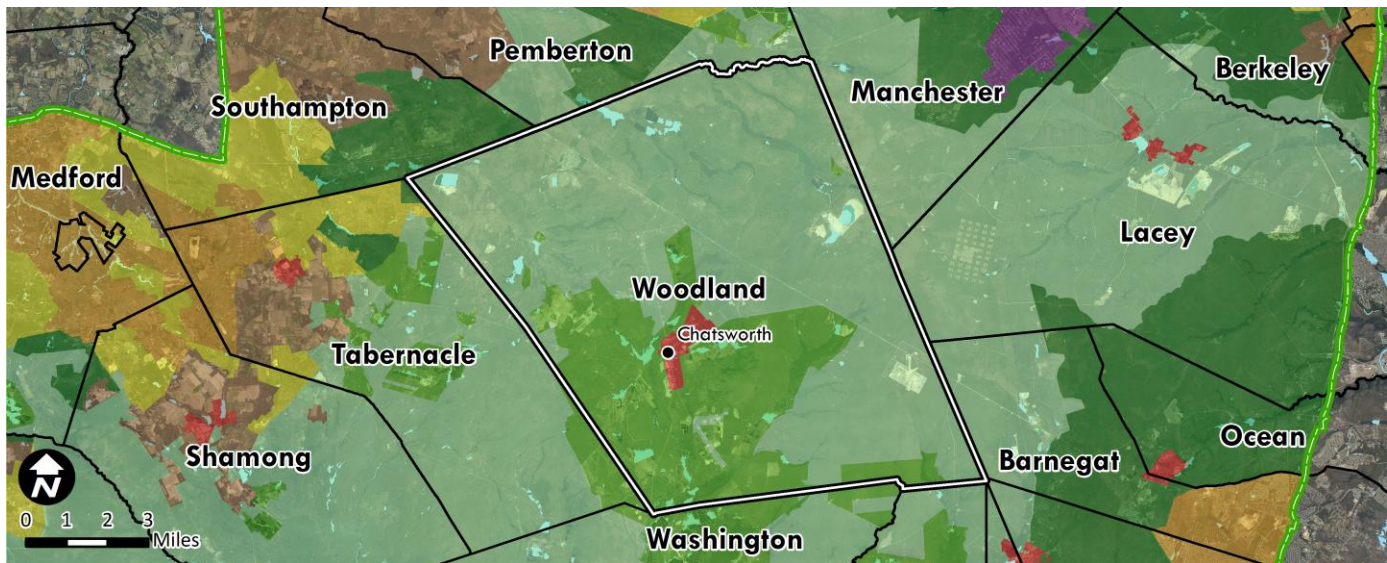
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
56	16	\$47,281

*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

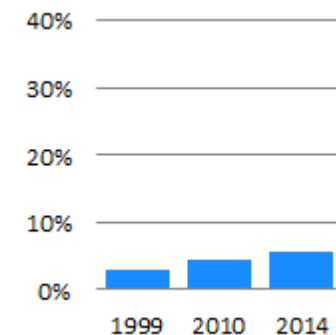
Pinelands Village

Water Body

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,795	12,033	164
Population Density (per mile ²)	19	1,763	198
Population Change - 2010 to 2014	0.4%	-0.2%	56
% Land Protected in Pinelands Area	77%	37%*	6*
Assessed Acres of Farmland	7,121	2,264	21
Building Permits Issued	0	37	167
Housing Transactions	8	84	166
Average Home Sale Price	\$270,000	\$286,205	58
Equalized Property Value (millions)	\$144.1	\$1,490.9	180
Effective Tax Rate	2.09	2.58	150
Average Residential Property Tax Bill	\$4,696	\$5,845	142
Per Capita Income (Estimate)	\$29,869	\$32,392	107
Estimated Unemployment Rate	6.8%	8.1%	138

Estimated Poverty Rate by Year



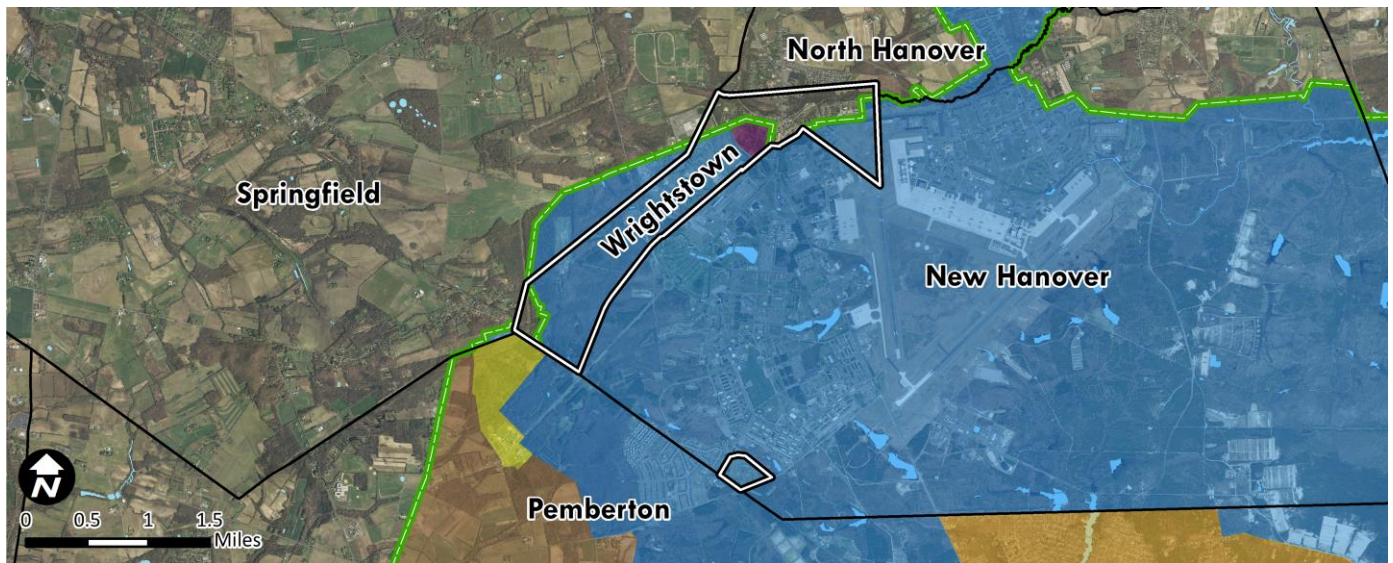
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
239	24	\$44,955

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

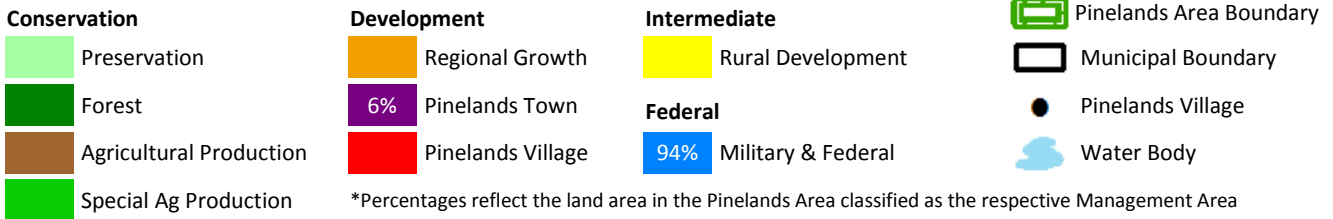
Wrightstown Borough



Pinelands Area 2010 population: 81 (10% of total population)
 Pinelands Area acreage: 897 (76% of total acreage)

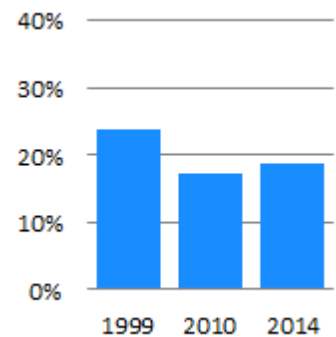


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	795	12,033	191
Population Density (per mile ²)	432	1,763	139
Population Change - 2010 to 2014	-0.9%	-0.2%	119
% Land Protected in Pinelands Area	0%	37%*	46*
Assessed Acres of Farmland	24	2,264	112
Building Permits Issued	0	37	167
Housing Transactions	1	84	192
Average Home Sale Price	\$83,000	\$286,205	192
Equalized Property Value (millions)	\$35.1	\$1,490.9	199
Effective Tax Rate	2.60	2.58	105
Average Residential Property Tax Bill	\$4,149	\$5,845	171
Per Capita Income (Estimate)	\$26,331	\$32,392	151
Estimated Unemployment Rate	7.4%	8.1%	116

Estimated Poverty Rate by Year



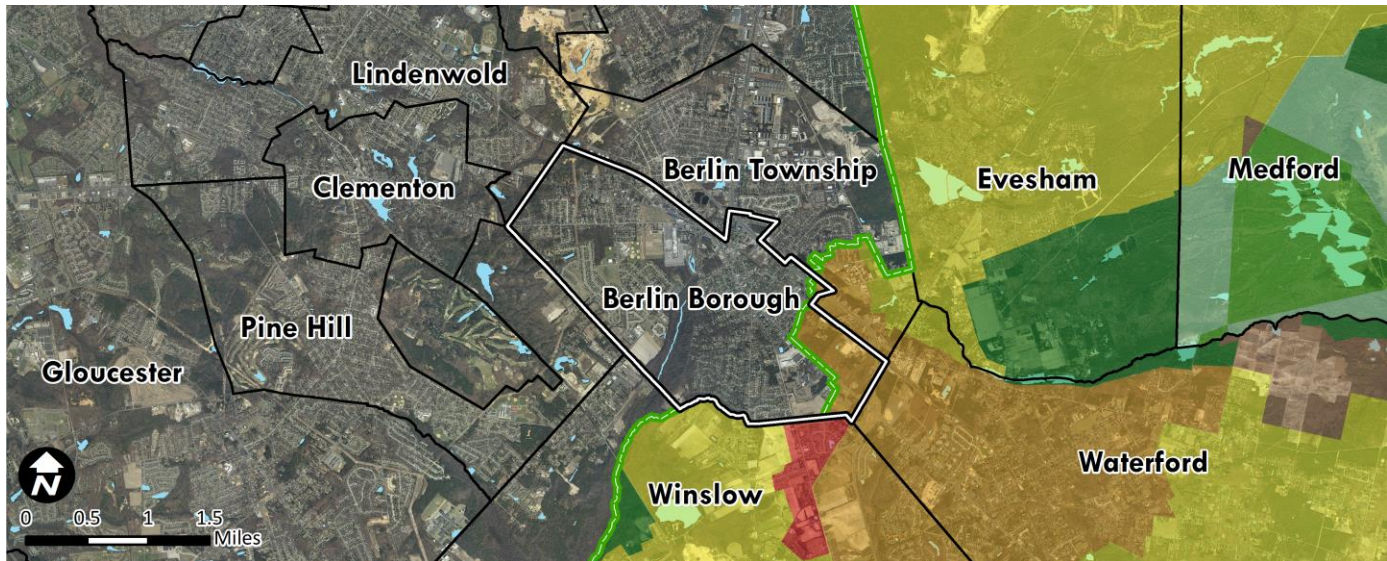
Private Sector Employment 603	Private Sector Establishments 72	Private Sector Avg. Annual Wages \$35,104
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Berlin Borough



Pinelands Area 2010 population: 76 (1% of total population)
 Pinelands Area acreage: 233 (10% of total acreage)

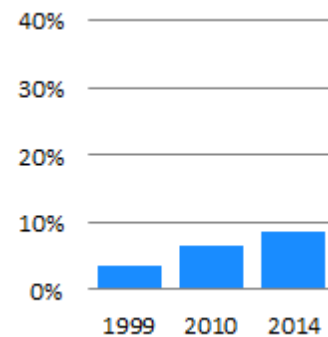


Pinelands Management Areas

Conservation	Development	Intermediate	Pinelands Area Boundary
Preservation	100% Regional Growth	Rural Development	Municipal Boundary
Forest	Pinelands Town	Federal	Pinelands Village
Agricultural Production	Pinelands Village	Military & Federal	Water Body
Special Ag Production	*Percentages reflect the land area in the Pinelands Area classified as the respective Management Area		

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,546	12,033	90
Population Density (per mile ²)	2,073	1,763	72
Population Change - 2010 to 2014	-0.6%	-0.2%	103
% Land Protected in Pinelands Area	0%	37%*	46*
Assessed Acres of Farmland	64	2,264	108
Building Permits Issued	0	37	167
Housing Transactions	73	84	65
Average Home Sale Price	\$226,768	\$286,205	86
Equalized Property Value (millions)	\$738.3	\$1,490.9	96
Effective Tax Rate	2.96	2.58	67
Average Residential Property Tax Bill	\$6,883	\$5,845	45
Per Capita Income (Estimate)	\$34,038	\$32,392	71
Estimated Unemployment Rate	7.0%	8.1%	132

Estimated Poverty Rate by Year



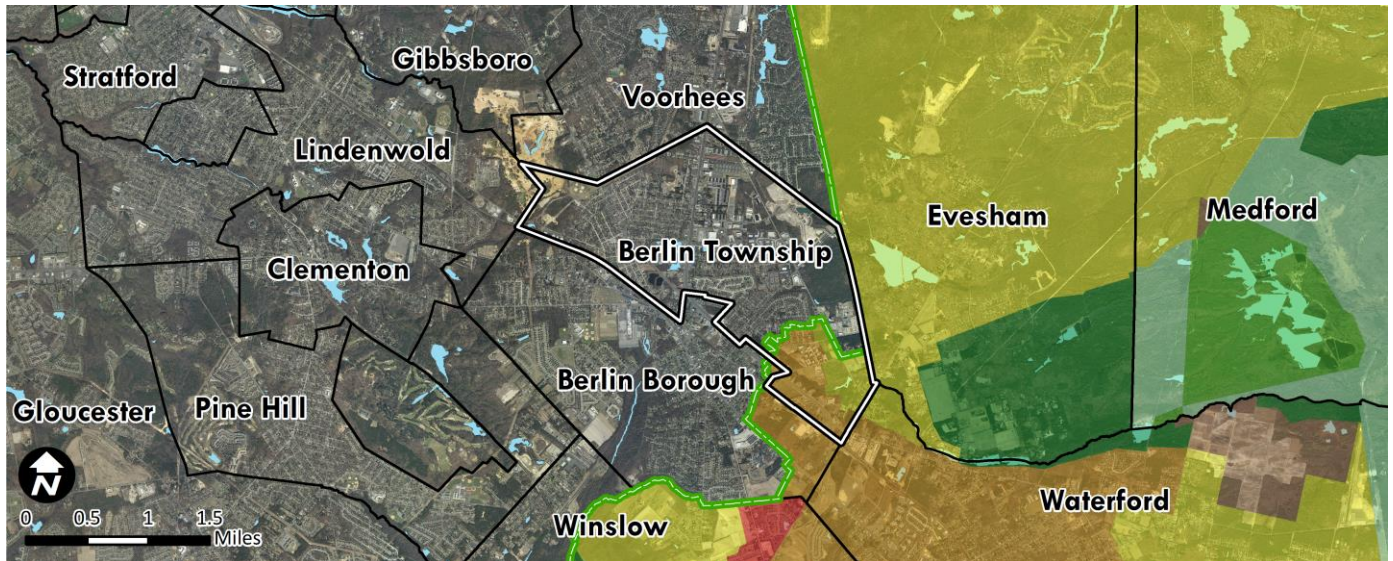
Private Sector Employment 4,185	Private Sector Establishments 360	Private Sector Avg. Annual Wages \$39,956
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

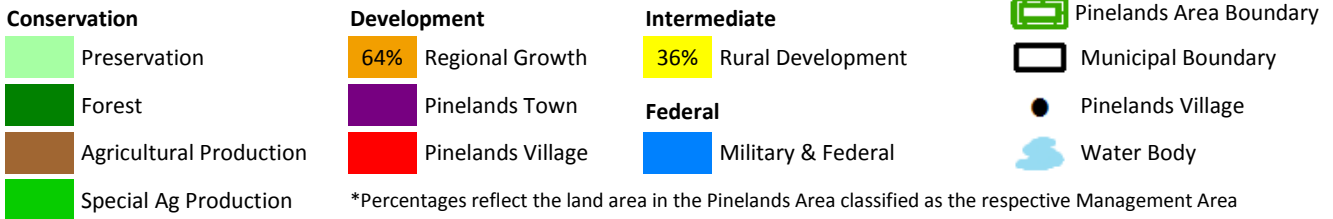
Berlin Township



Pinelands Area 2010 population: 303 (6% of total population)
 Pinelands Area acreage: 347 (16% of total acreage)

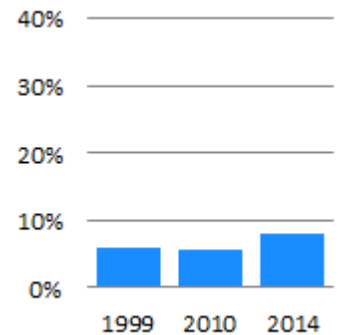


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	5,362	12,033	107
Population Density (per mile ²)	1,631	1,763	82
Population Change - 2010 to 2014	0.1%	-0.2%	67
% Land Protected in Pinelands Area	0%	37%*	46*
Assessed Acres of Farmland	157	2,264	100
Building Permits Issued	29	37	57
Housing Transactions	28	84	111
Average Home Sale Price	\$164,403	\$286,205	149
Equalized Property Value (millions)	\$560.3	\$1,490.9	112
Effective Tax Rate	3.54	2.58	30
Average Residential Property Tax Bill	\$5,919	\$5,845	81
Per Capita Income (Estimate)	\$27,461	\$32,392	132
Estimated Unemployment Rate	8.4%	8.1%	76

Estimated Poverty Rate by Year



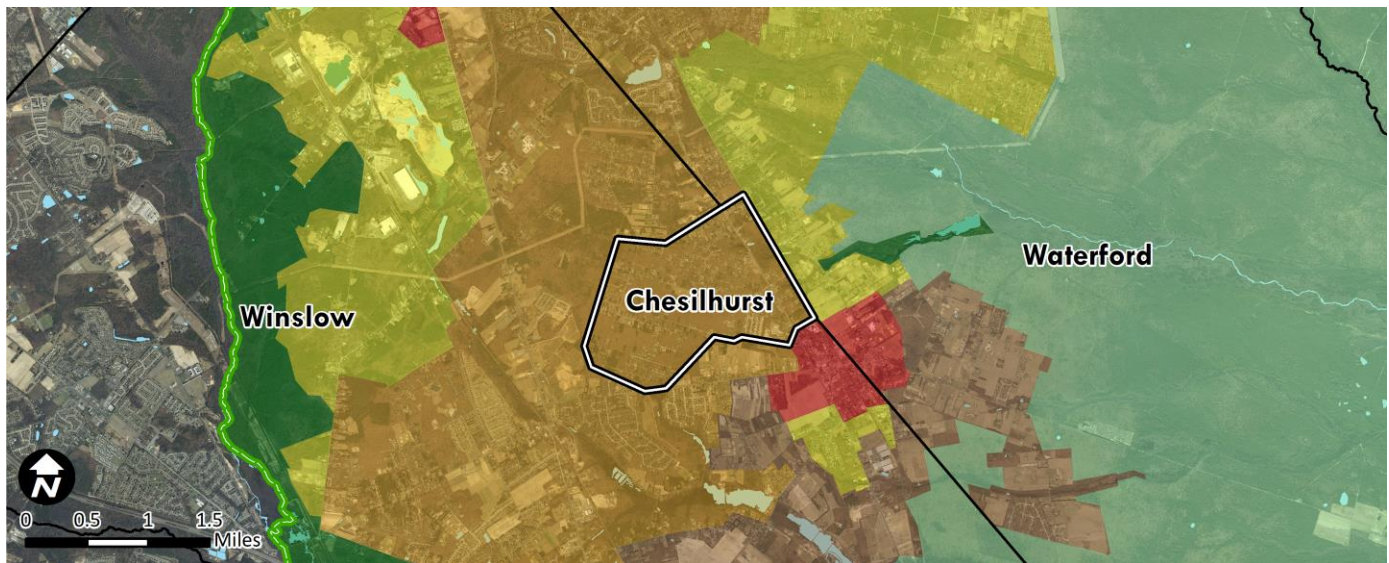
Private Sector Employment 5,039	Private Sector Establishments 377	Private Sector Avg. Annual Wages \$38,398
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

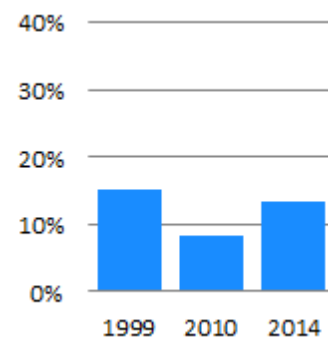


Water Body

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,626	12,033	169
Population Density (per mile ²)	942	1,763	108
Population Change - 2010 to 2014	-0.5%	-0.2%	98
% Land Protected in Pinelands Area	< 1%	37%*	45*
Assessed Acres of Farmland	0	2,264	123
Building Permits Issued	2	37	143
Housing Transactions	4	84	180
Average Home Sale Price	\$140,000	\$286,205	170
Equalized Property Value (millions)	\$89.1	\$1,490.9	191
Effective Tax Rate	3.30	2.58	41
Average Residential Property Tax Bill	\$4,973	\$5,845	126
Per Capita Income (Estimate)	\$25,527	\$32,392	160
Estimated Unemployment Rate	10.5%	8.1%	31

Estimated Poverty Rate by Year



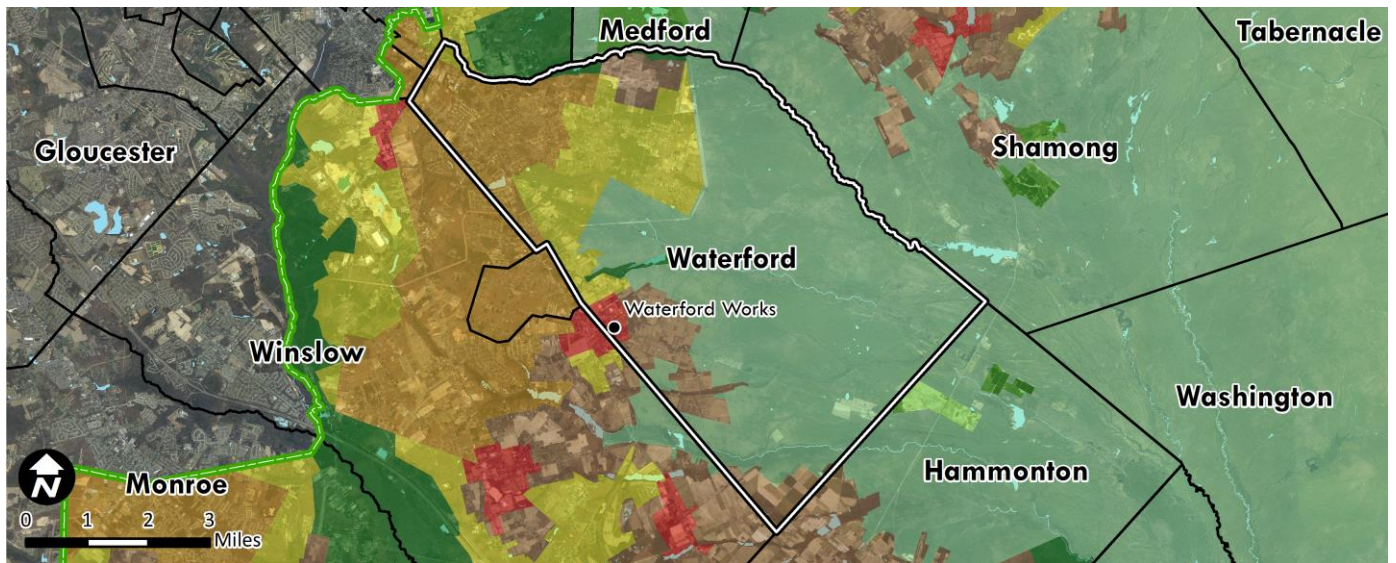
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
79	16	\$30,871

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

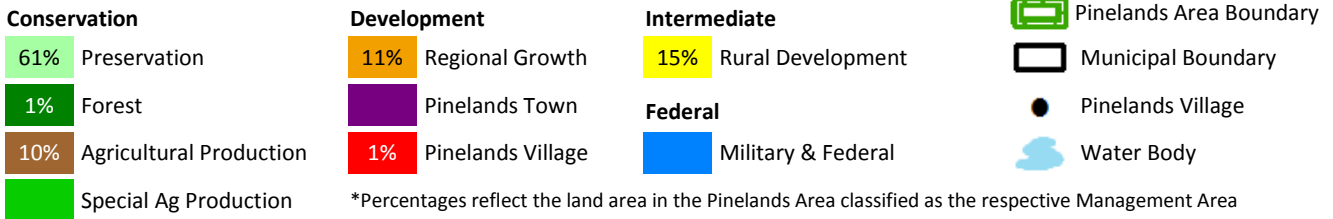
Waterford Township



Pinelands Area 2010 population: 10,649 (100% of total population)
 Pinelands Area acreage: 23,176 (100% of total acreage)

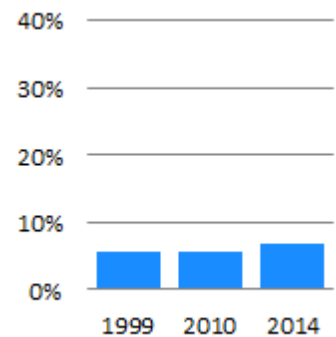


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	10,732	12,033	62
Population Density (per mile ²)	296	1,763	151
Population Change - 2010 to 2014	0.8%	-0.2%	46
% Land Protected in Pinelands Area	65%	37%*	12*
Assessed Acres of Farmland	2,253	2,264	59
Building Permits Issued	34	37	53
Housing Transactions	52	84	85
Average Home Sale Price	\$183,521	\$286,205	124
Equalized Property Value (millions)	\$764.1	\$1,490.9	94
Effective Tax Rate	3.40	2.58	35
Average Residential Property Tax Bill	\$6,401	\$5,845	63
Per Capita Income (Estimate)	\$31,603	\$32,392	87
Estimated Unemployment Rate	8.7%	8.1%	69

Estimated Poverty Rate by Year



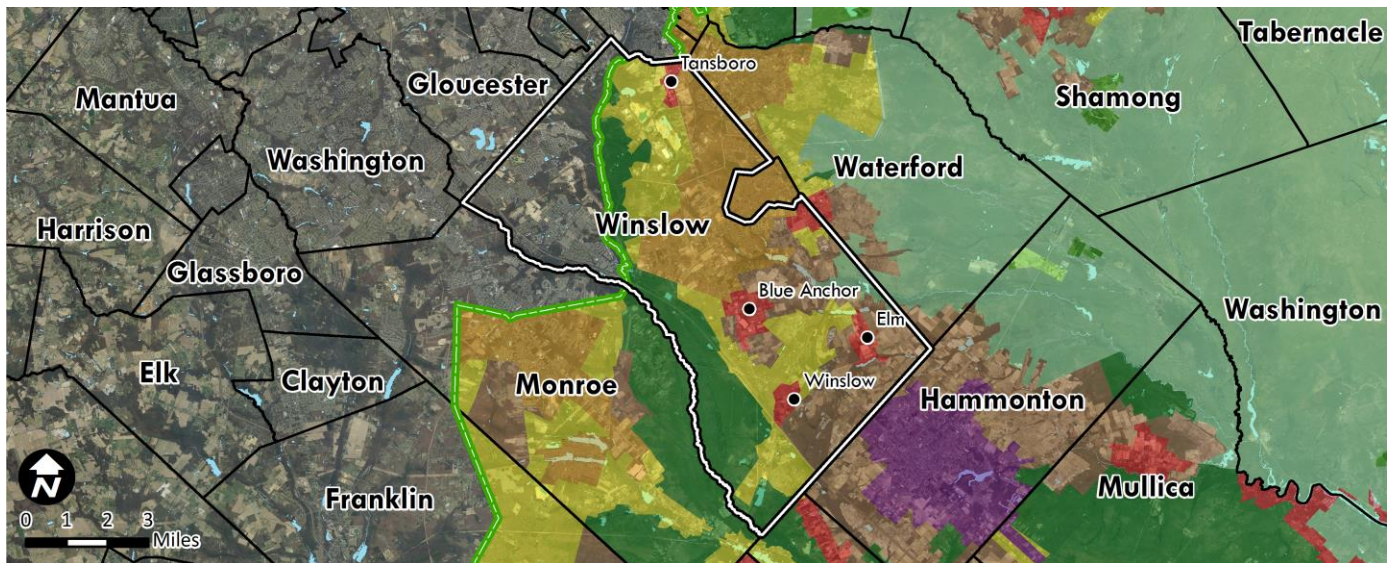
Private Sector Employment 1,931	Private Sector Establishments 217	Private Sector Avg. Annual Wages \$30,119
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

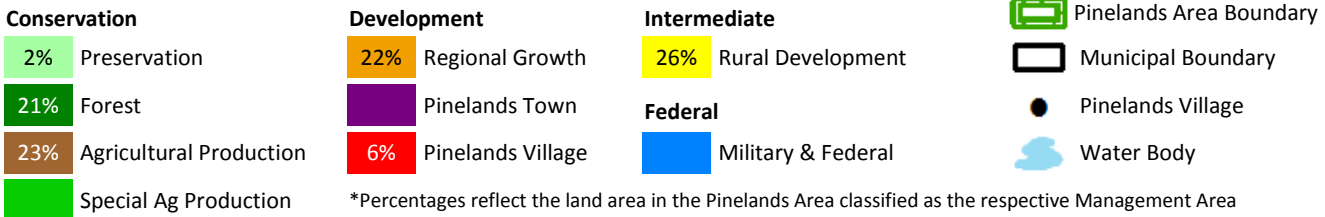
Winslow Township



Pinelands Area 2010 population: 17,813 (45% of total population)
 Pinelands Area acreage: 30,096 (81% of total acreage)

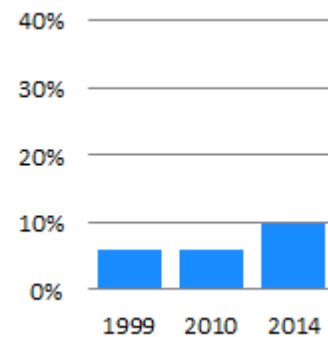


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	38,895	12,033	16
Population Density (per mile ²)	667	1,763	124
Population Change - 2010 to 2014	-1.5%	-0.2%	168
% Land Protected in Pinelands Area	30%	37%*	30*
Assessed Acres of Farmland	5,446	2,264	36
Building Permits Issued	0	37	167
Housing Transactions	215	84	18
Average Home Sale Price	\$181,020	\$286,205	128
Equalized Property Value (millions)	\$2,639.9	\$1,490.9	33
Effective Tax Rate	3.24	2.58	49
Average Residential Property Tax Bill	\$5,547	\$5,845	94
Per Capita Income (Estimate)	\$29,700	\$32,392	111
Estimated Unemployment Rate	8.1%	8.1%	83

Estimated Poverty Rate by Year

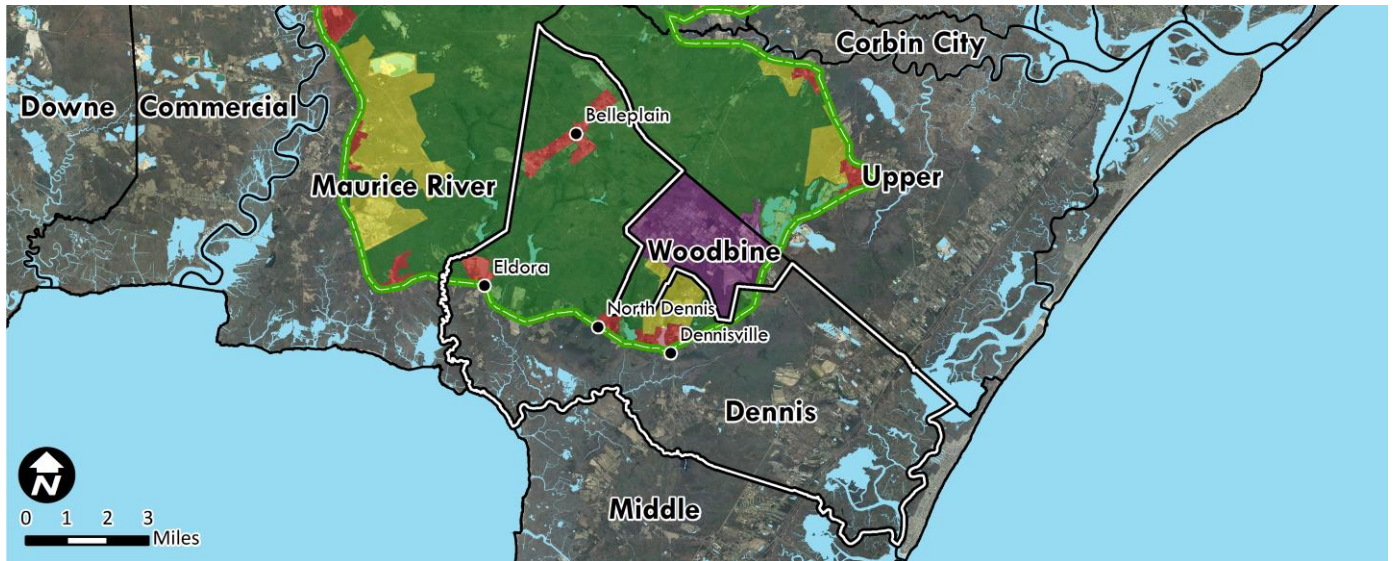


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
5,640	599	\$32,726

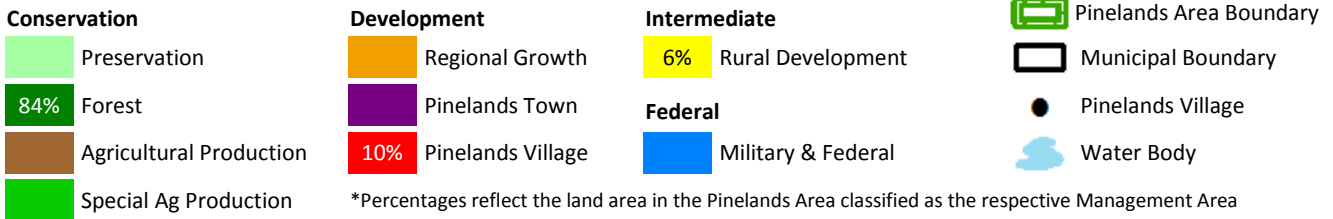
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

Dennis Township

Pinelands Area 2010 population: 1,570 (24% of total population)
 Pinelands Area acreage: 15,697 (38% of total acreage)

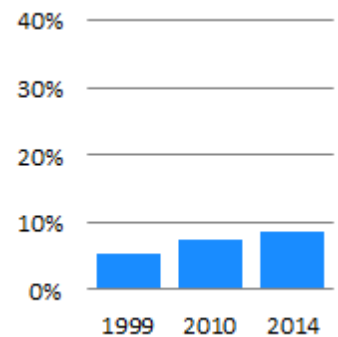


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,319	12,033	101
Population Density (per mile ²)	99	1,763	184
Population Change - 2010 to 2014	-2.3%	-0.2%	187
% Land Protected in Pinelands Area	68%	37%*	11*
Assessed Acres of Farmland	4,084	2,264	47
Building Permits Issued	12	37	92
Housing Transactions	26	84	117
Average Home Sale Price	\$239,731	\$286,205	78
Equalized Property Value (millions)	\$872.6	\$1,490.9	88
Effective Tax Rate	1.55	2.58	175
Average Residential Property Tax Bill	\$2,905	\$5,845	196
Per Capita Income (Estimate)	\$34,076	\$32,392	69
Estimated Unemployment Rate	9.9%	8.1%	38

Estimated Poverty Rate by Year

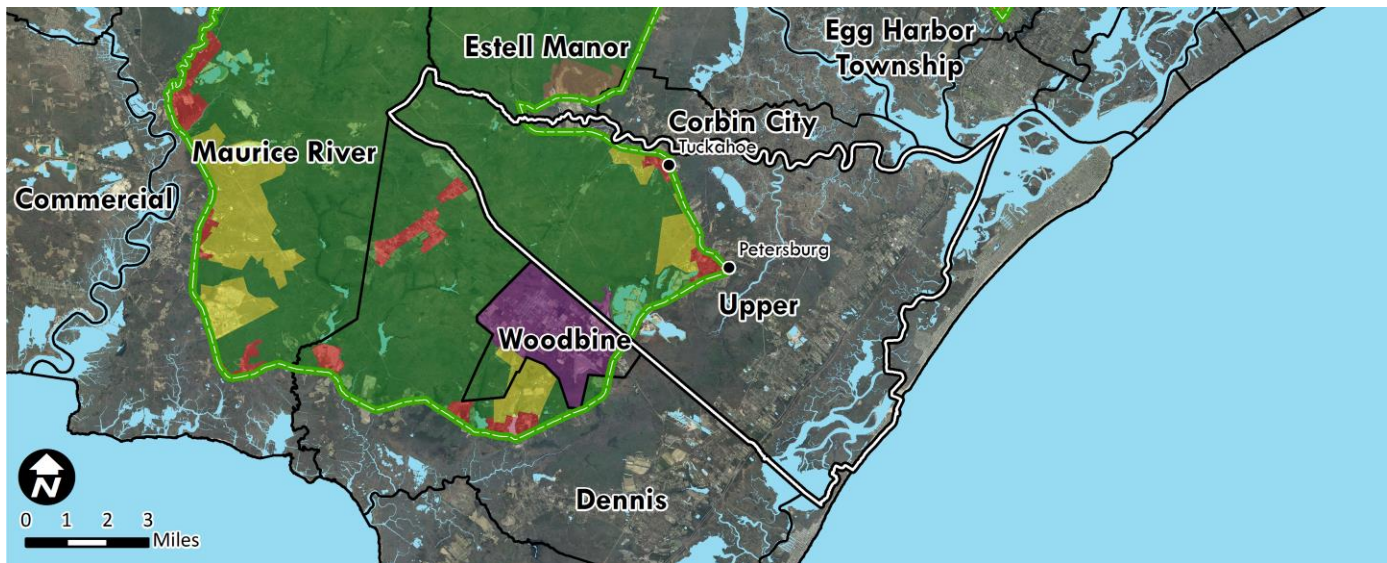


Private Sector Employment 1,542	Private Sector Establishments 187	Private Sector Avg. Annual Wages \$37,454
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

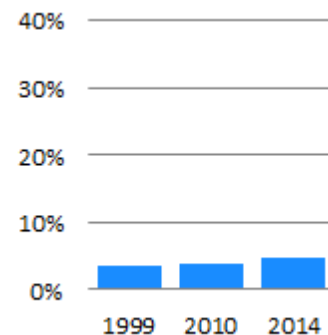


Water Body

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	12,113	12,033	53
Population Density (per mile ²)	176	1,763	171
Population Change - 2010 to 2014	-2.1%	-0.2%	182
% Land Protected in Pinelands Area	51%	37%*	17*
Assessed Acres of Farmland	2,417	2,264	57
Building Permits Issued	13	37	86
Housing Transactions	94	84	57
Average Home Sale Price	\$351,563	\$286,205	31
Equalized Property Value (millions)	\$1,929.7	\$1,490.9	48
Effective Tax Rate	1.60	2.58	173
Average Residential Property Tax Bill	\$4,600	\$5,845	150
Per Capita Income (Estimate)	\$36,746	\$32,392	49
Estimated Unemployment Rate	8.0%	8.1%	85

Estimated Poverty Rate by Year



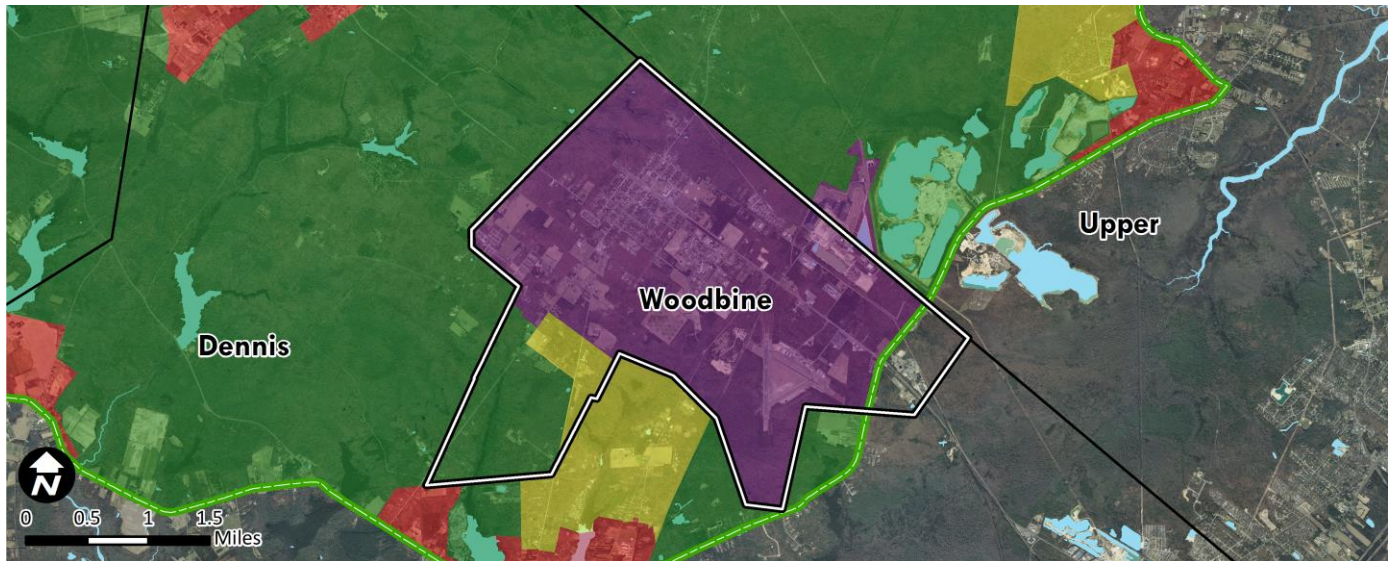
Private Sector Employment 2,612	Private Sector Establishments 268	Private Sector Avg. Annual Wages \$36,644
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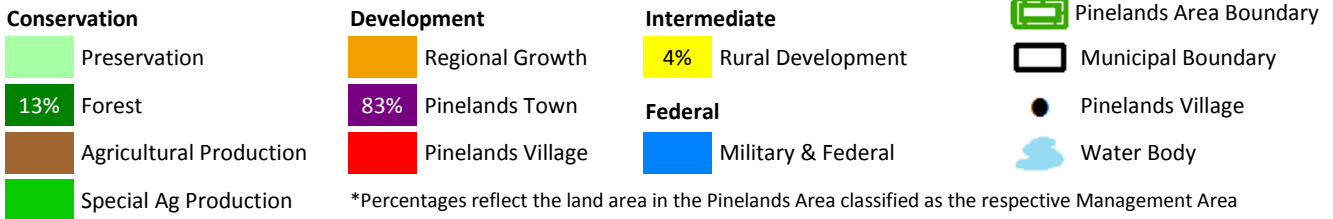
Woodbine Borough



Pinelands Area 2010 population: 2,465 (100% of total population)
 Pinelands Area acreage: 4,801 (95% of total acreage)

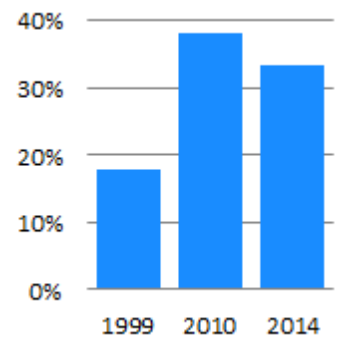


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,439	12,033	153
Population Density (per mile ²)	309	1,763	150
Population Change - 2010 to 2014	-1.3%	-0.2%	148
% Land Protected in Pinelands Area	7%	37%*	41*
Assessed Acres of Farmland	318	2,264	88
Building Permits Issued	1	37	152
Housing Transactions	0	84	196
Average Home Sale Price	-	\$286,205	-
Equalized Property Value (millions)	\$157.1	\$1,490.9	178
Effective Tax Rate	1.49	2.58	178
Average Residential Property Tax Bill	\$1,673	\$5,845	201
Per Capita Income (Estimate)	\$18,494	\$32,392	194
Estimated Unemployment Rate	10.5%	8.1%	30

Estimated Poverty Rate by Year



Private Sector Employment
565

Private Sector Establishments
78

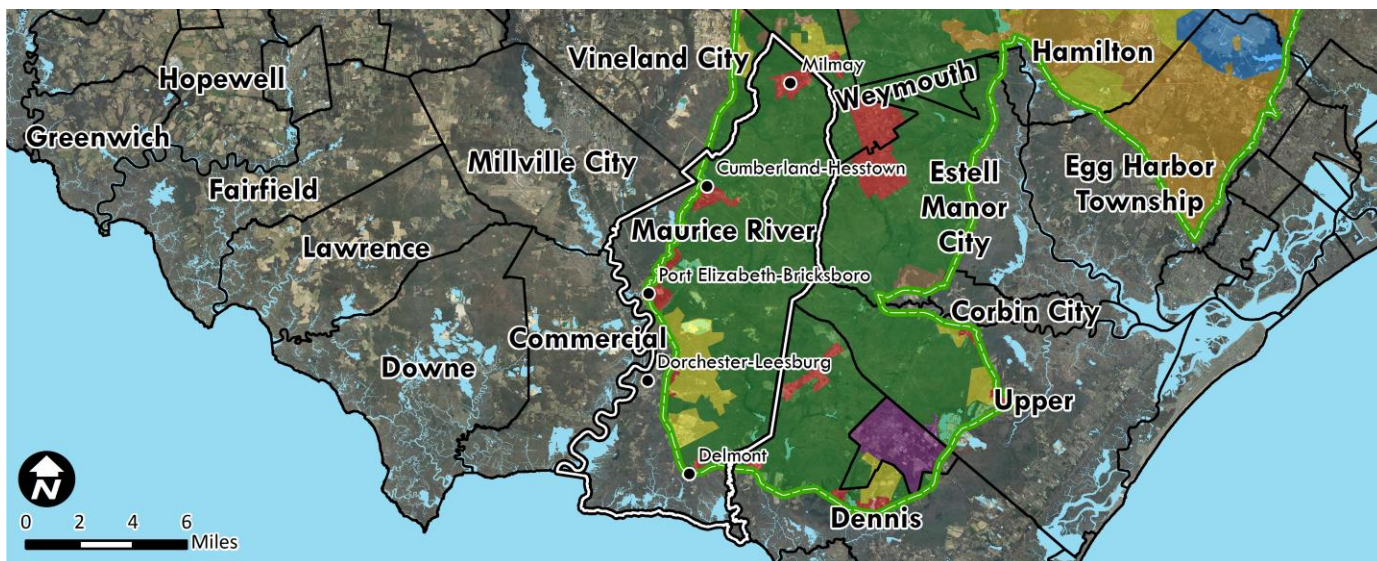
Private Sector Avg. Annual Wages
\$38,007

*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

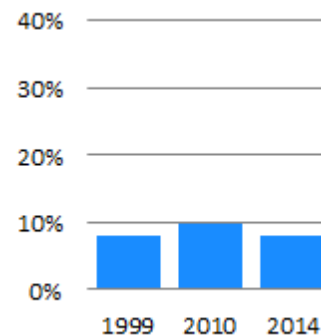
Pinelands Village

Water Body

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,923	12,033	85
Population Density (per mile ²)	84	1,763	189
Population Change - 2010 to 2014	-0.7%	-0.2%	107
% Land Protected in Pinelands Area	50%	37%*	19*
Assessed Acres of Farmland	9,955	2,264	11
Building Permits Issued	13	37	86
Housing Transactions	7	84	169
Average Home Sale Price	\$225,194	\$286,205	88
Equalized Property Value (millions)	\$303.8	\$1,490.9	140
Effective Tax Rate	2.35	2.58	125
Average Residential Property Tax Bill	\$4,271	\$5,845	165
Per Capita Income (Estimate)	\$22,375	\$32,392	182
Estimated Unemployment Rate	11.4%	8.1%	16

Estimated Poverty Rate by Year



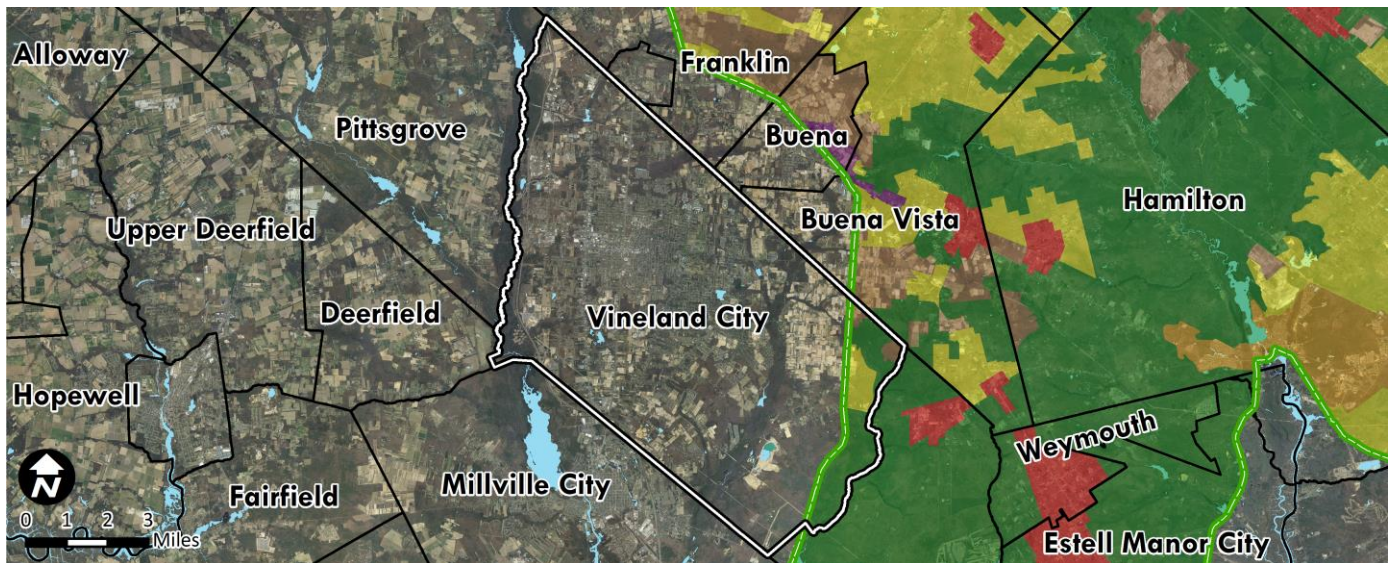
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
219	28	\$29,109

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

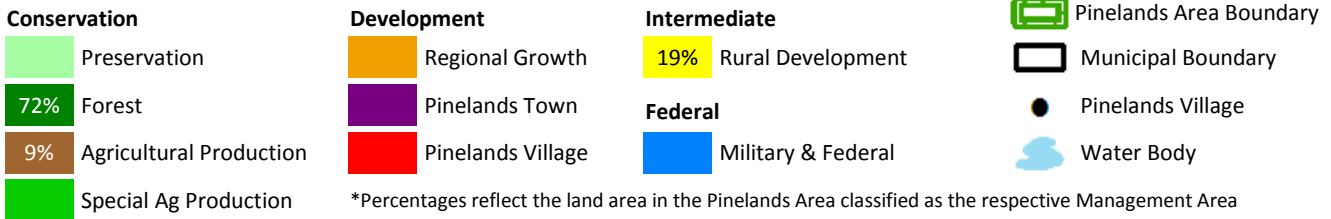
Vineland City



Pinelands Area 2010 population: 156 (< 1% of total population)
 Pinelands Area acreage: 3,287 (7% of total acreage)

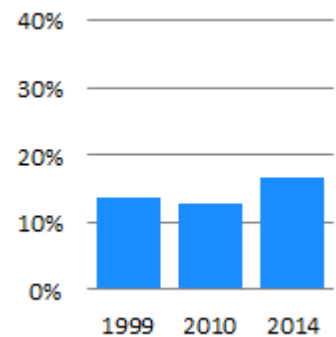


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	61,171	12,033	7
Population Density (per mile ²)	885	1,763	112
Population Change - 2010 to 2014	0.7%	-0.2%	47
% Land Protected in Pinelands Area	80%	37%*	5*
Assessed Acres of Farmland	9,545	2,264	12
Building Permits Issued	71	37	26
Housing Transactions	260	84	14
Average Home Sale Price	\$164,612	\$286,205	148
Equalized Property Value (millions)	\$4,045.6	\$1,490.9	18
Effective Tax Rate	2.30	2.58	128
Average Residential Property Tax Bill	\$3,732	\$5,845	185
Per Capita Income (Estimate)	\$24,248	\$32,392	170
Estimated Unemployment Rate	9.7%	8.1%	45

Estimated Poverty Rate by Year



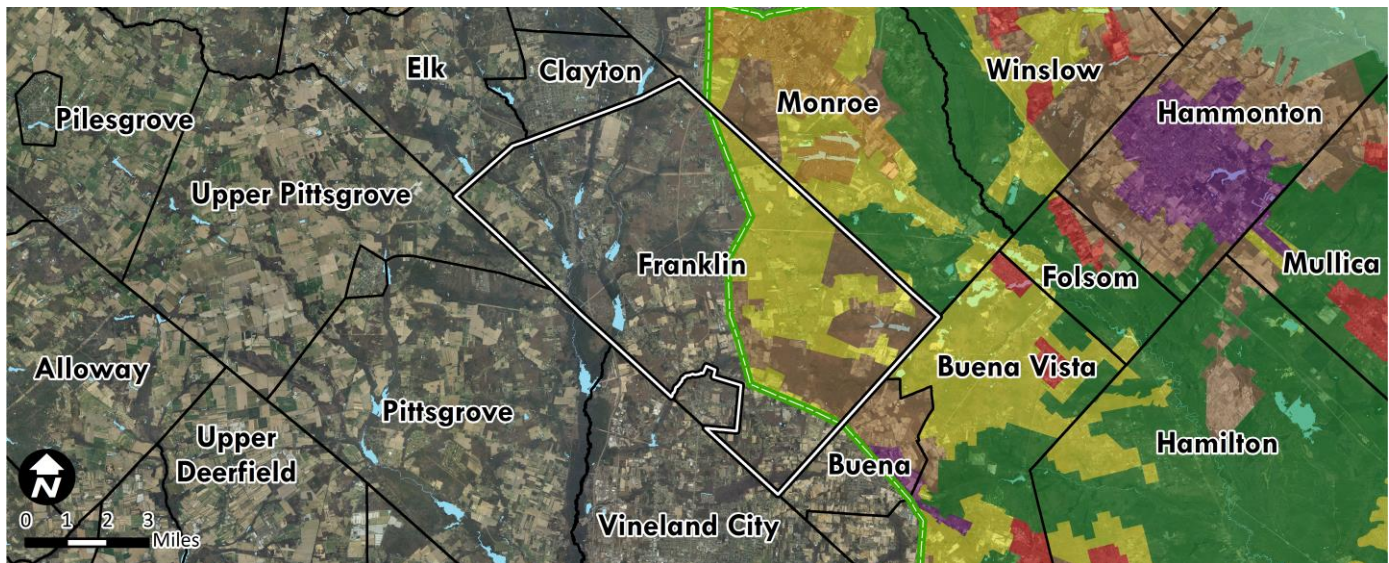
Private Sector Employment 24,004	Private Sector Establishments 1,560	Private Sector Avg. Annual Wages \$40,119
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

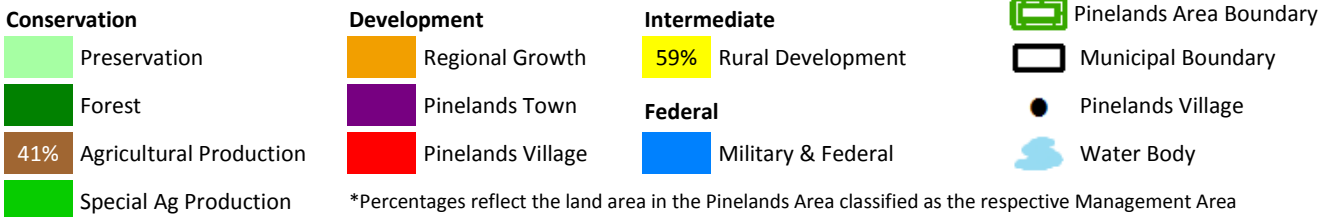
Franklin Township



Pinelands Area 2010 population: 2,616 (16% of total population)
 Pinelands Area acreage: 12,835 (36% of total acreage)

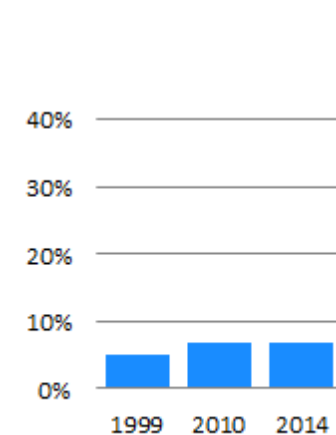


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	16,702	12,033	44
Population Density (per mile ²)	296	1,763	152
Population Change - 2010 to 2014	-0.7%	-0.2%	109
% Land Protected in Pinelands Area	33%	37%*	26*
Assessed Acres of Farmland	13,080	2,264	6
Building Permits Issued	21	37	64
Housing Transactions	84	84	61
Average Home Sale Price	\$213,223	\$286,205	100
Equalized Property Value (millions)	\$1,293.7	\$1,490.9	67
Effective Tax Rate	2.86	2.58	72
Average Residential Property Tax Bill	\$5,479	\$5,845	100
Per Capita Income (Estimate)	\$31,682	\$32,392	85
Estimated Unemployment Rate	9.0%	8.1%	60

Estimated Poverty Rate by Year



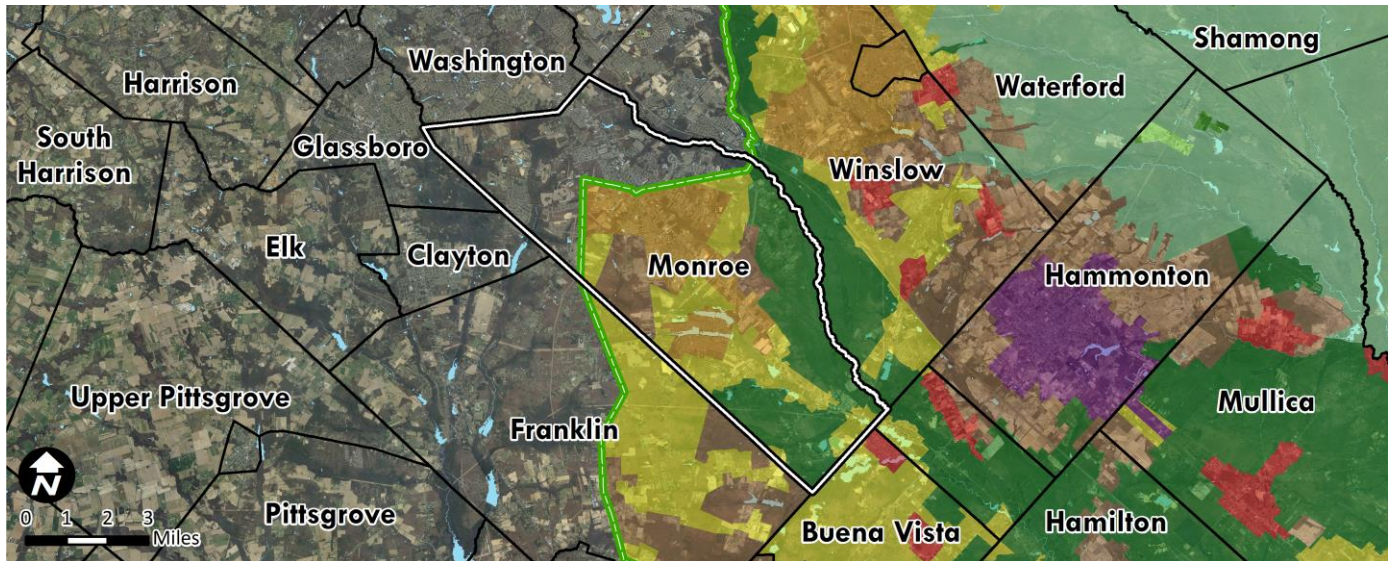
Private Sector Employment 1,577	Private Sector Establishments 227	Private Sector Avg. Annual Wages \$39,508
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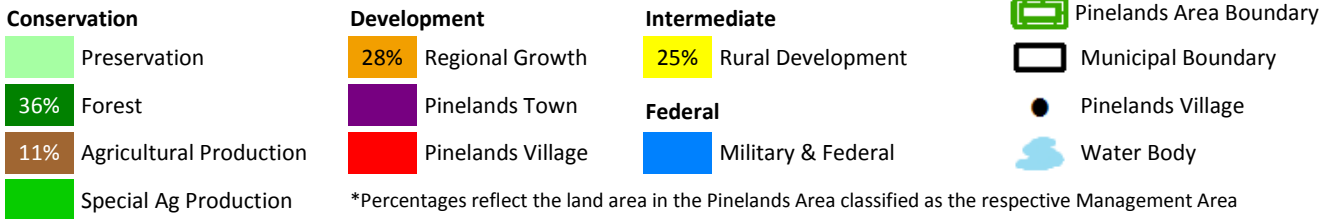
Monroe Township



Pinelands Area 2010 population: 17,871 (49% of total population)
 Pinelands Area acreage: 20,770 (69% of total acreage)

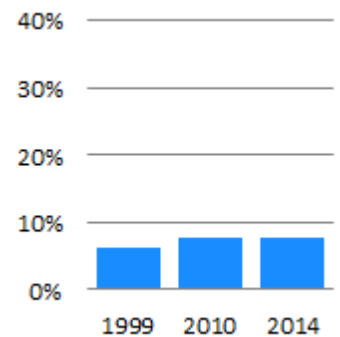


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	37,379	12,033	18
Population Density (per mile ²)	797	1,763	116
Population Change - 2010 to 2014	3.5%	-0.2%	9
% Land Protected in Pinelands Area	25%	37%*	33*
Assessed Acres of Farmland	5,014	2,264	39
Building Permits Issued	37	37	49
Housing Transactions	224	84	16
Average Home Sale Price	\$200,170	\$286,205	107
Equalized Property Value (millions)	\$2,516.7	\$1,490.9	35
Effective Tax Rate	3.40	2.58	34
Average Residential Property Tax Bill	\$6,610	\$5,845	56
Per Capita Income (Estimate)	\$30,335	\$32,392	102
Estimated Unemployment Rate	8.0%	8.1%	89

Estimated Poverty Rate by Year

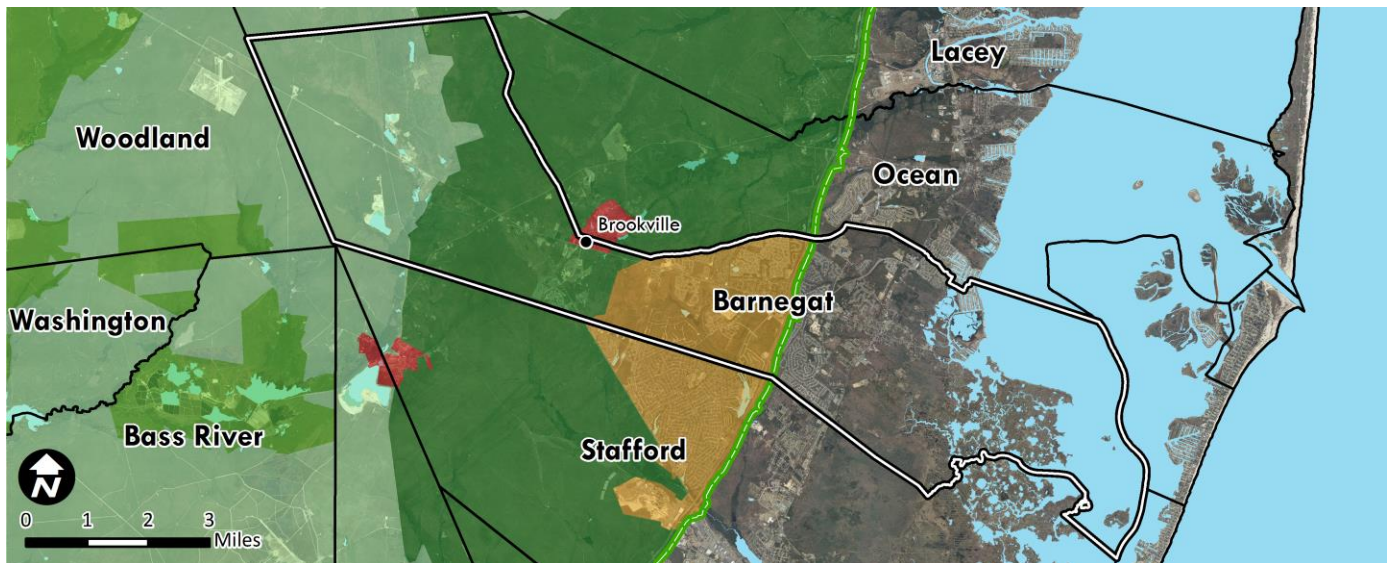


Private Sector Employment 5,722	Private Sector Establishments 606	Private Sector Avg. Annual Wages \$35,445
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

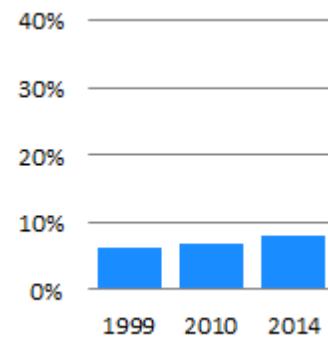
Pinelands Village

Water Body

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	22,303	12,033	31
Population Density (per mile ²)	555	1,763	129
Population Change - 2010 to 2014	6.5%	-0.2%	4
% Land Protected in Pinelands Area	61%	37%*	14*
Assessed Acres of Farmland	229	2,264	94
Building Permits Issued	73	37	24
Housing Transactions	185	84	26
Average Home Sale Price	\$230,210	\$286,205	83
Equalized Property Value (millions)	\$2,210.9	\$1,490.9	42
Effective Tax Rate	2.47	2.58	117
Average Residential Property Tax Bill	\$5,886	\$5,845	84
Per Capita Income (Estimate)	\$28,341	\$32,392	124
Estimated Unemployment Rate	8.0%	8.1%	87

Estimated Poverty Rate by Year



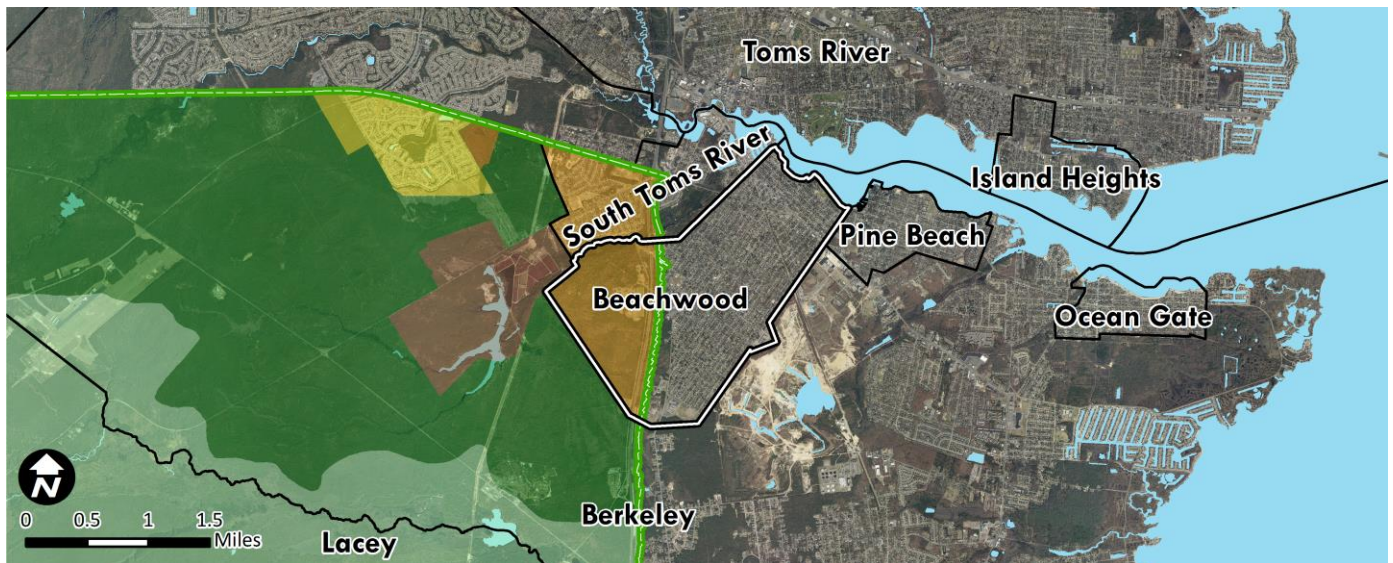
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
1,849	293	\$36,039

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

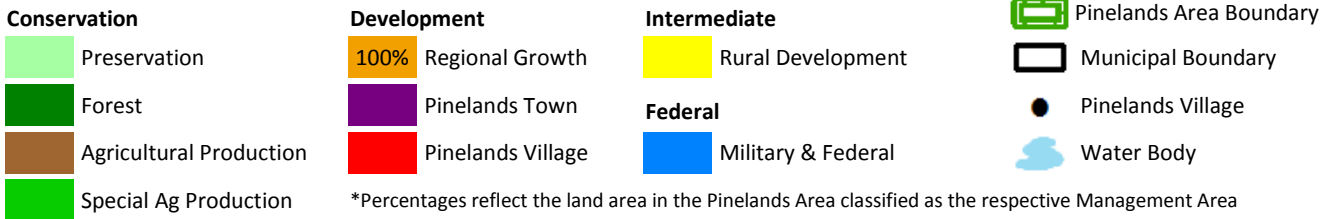
Beachwood Borough



Pinelands Area 2010 population: 2 (< 1% of total population)
 Pinelands Area acreage: 500 (28% of total acreage)

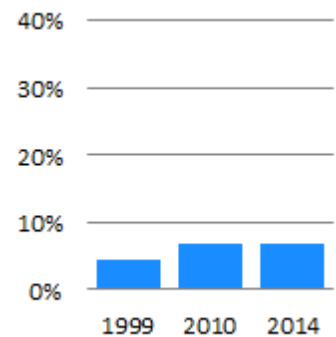


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	11,253	12,033	60
Population Density (per mile ²)	4,061	1,763	22
Population Change - 2010 to 2014	1.9%	-0.2%	25
% Land Protected in Pinelands Area	69%	37%*	10*
Assessed Acres of Farmland	0	2,264	123
Building Permits Issued	7	37	113
Housing Transactions	65	84	71
Average Home Sale Price	\$225,867	\$286,205	87
Equalized Property Value (millions)	\$873.1	\$1,490.9	87
Effective Tax Rate	2.05	2.58	152
Average Residential Property Tax Bill	\$4,568	\$5,845	153
Per Capita Income (Estimate)	\$29,829	\$32,392	108
Estimated Unemployment Rate	6.6%	8.1%	145

Estimated Poverty Rate by Year



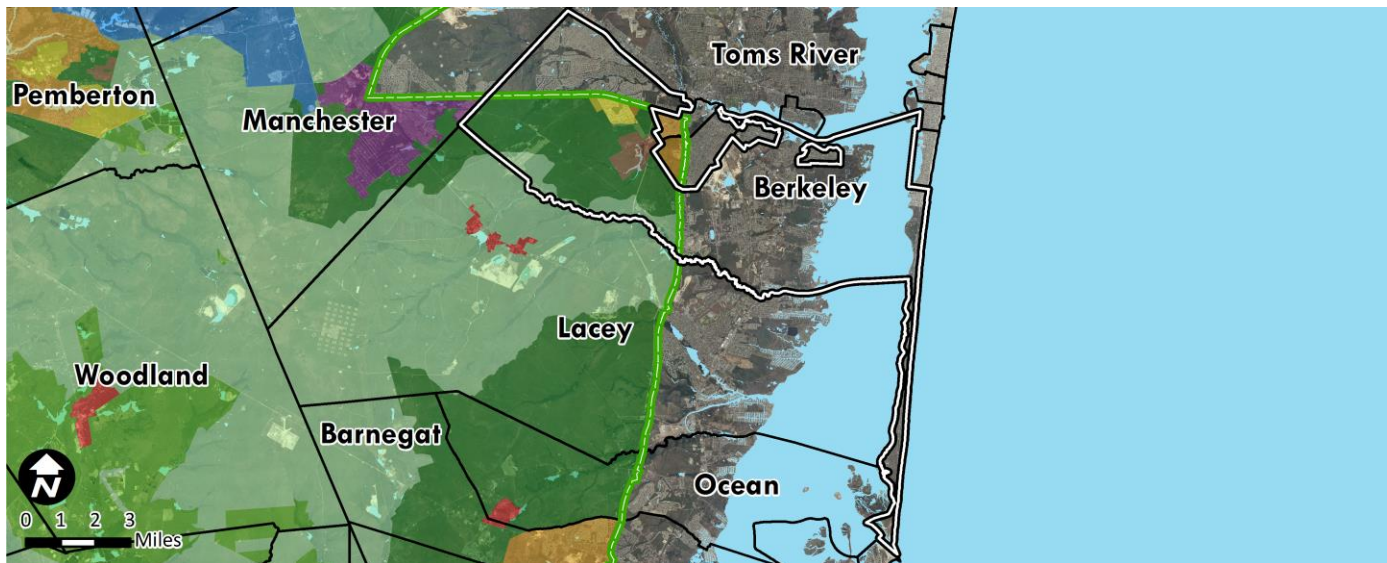
Private Sector Employment 642	Private Sector Establishments 113	Private Sector Avg. Annual Wages \$26,923
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

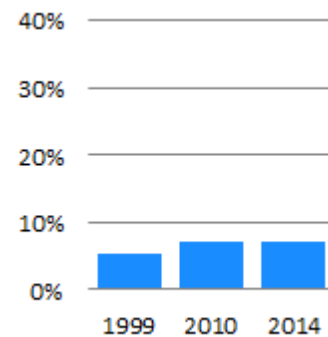
- 5% Rural Development
- Federal**
- Military & Federal

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

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	41,950	12,033	13
Population Density (per mile ²)	772	1,763	118
Population Change - 2010 to 2014	1.7%	-0.2%	27
% Land Protected in Pinelands Area	75%	37%*	8*
Assessed Acres of Farmland	88	2,264	104
Building Permits Issued	116	37	15
Housing Transactions	636	84	2
Average Home Sale Price	\$171,762	\$286,205	137
Equalized Property Value (millions)	\$5,089.9	\$1,490.9	12
Effective Tax Rate	1.95	2.58	156
Average Residential Property Tax Bill	\$3,880	\$5,845	179
Per Capita Income (Estimate)	\$27,146	\$32,392	137
Estimated Unemployment Rate	9.0%	8.1%	62

Estimated Poverty Rate by Year



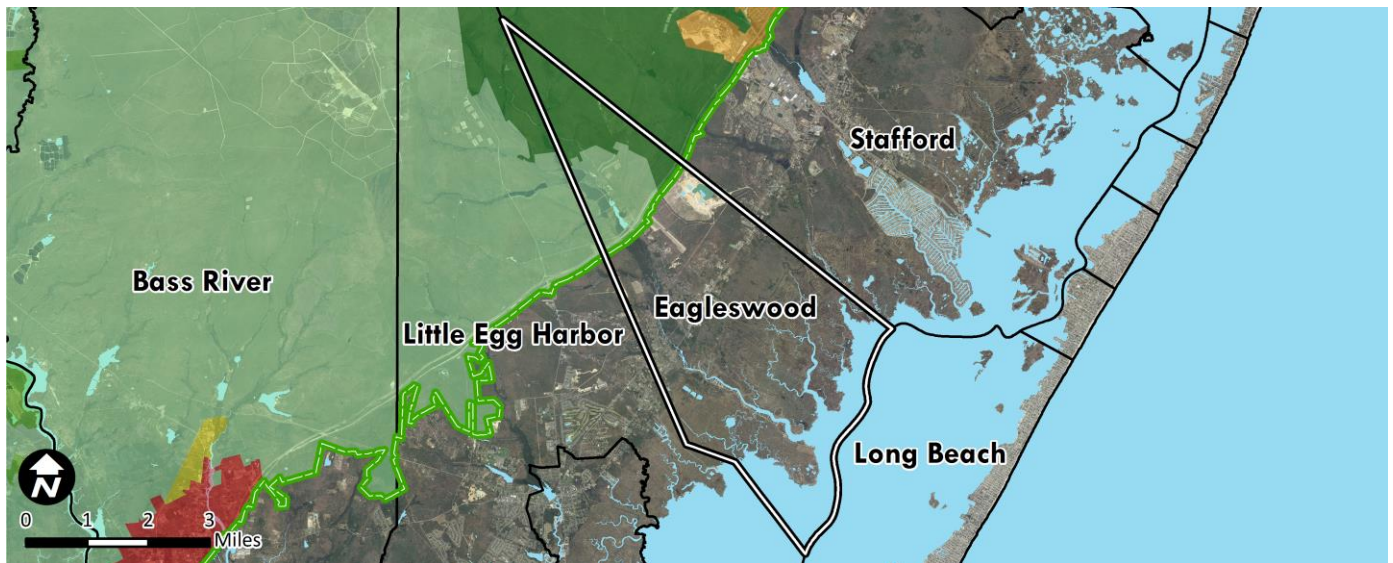
Private Sector Employment 3,186	Private Sector Establishments 367	Private Sector Avg. Annual Wages \$34,083
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

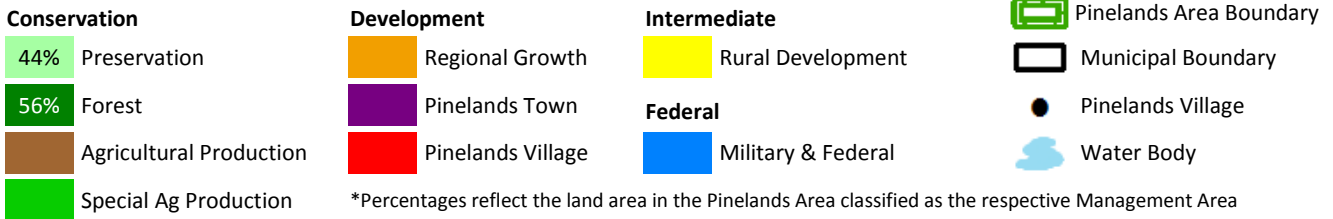
Eagleswood Township



Pinelands Area 2010 population: 0 (0% of total population)
 Pinelands Area acreage: 2,435 (20% of total acreage)

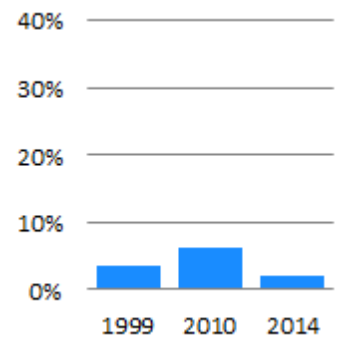


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,617	12,033	170
Population Density (per mile ²)	86	1,763	186
Population Change - 2010 to 2014	0.9%	-0.2%	44
% Land Protected in Pinelands Area	88%	37%*	3*
Assessed Acres of Farmland	359	2,264	84
Building Permits Issued	14	37	79
Housing Transactions	7	84	169
Average Home Sale Price	\$255,357	\$286,205	68
Equalized Property Value (millions)	\$247.0	\$1,490.9	153
Effective Tax Rate	2.25	2.58	132
Average Residential Property Tax Bill	\$5,639	\$5,845	92
Per Capita Income (Estimate)	\$28,398	\$32,392	122
Estimated Unemployment Rate	8.9%	8.1%	64

Estimated Poverty Rate by Year

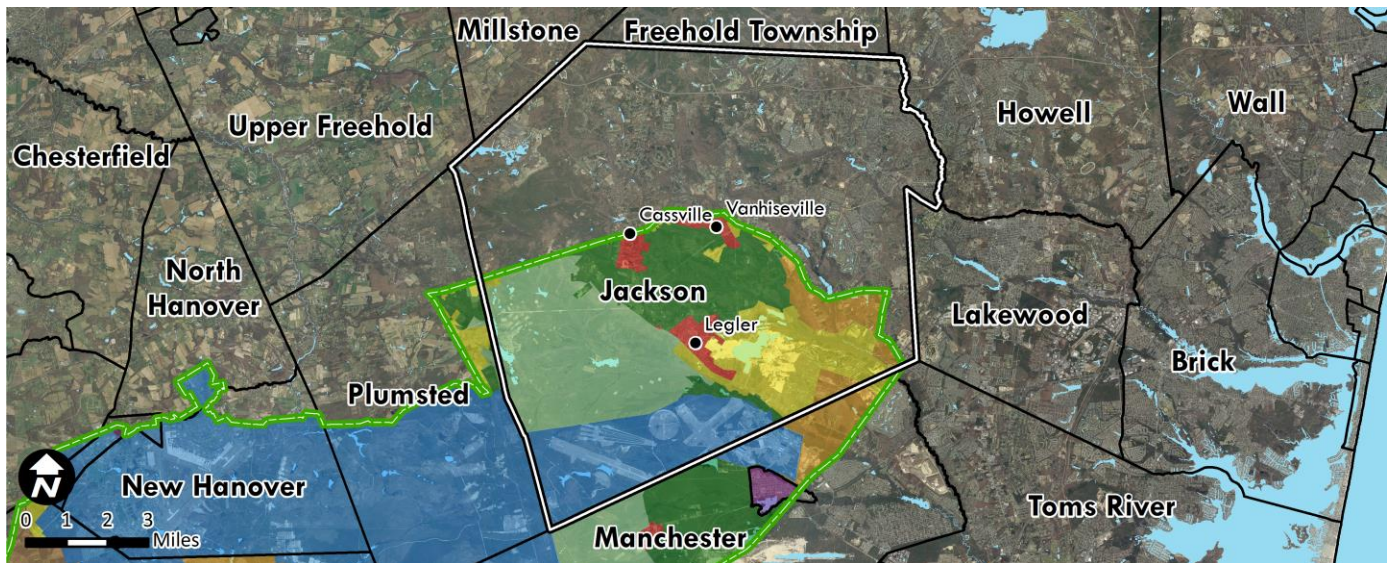


Private Sector Employment 827	Private Sector Establishments 94	Private Sector Avg. Annual Wages \$49,139
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

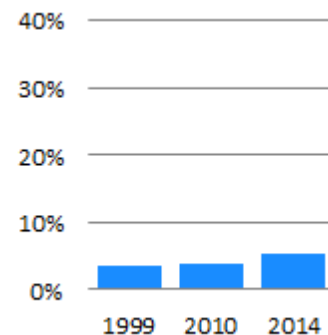
- 17% Rural Development
- Federal**
- 21% Military & Federal

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

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	56,449	12,033	8
Population Density (per mile ²)	560	1,763	128
Population Change - 2010 to 2014	2.9%	-0.2%	13
% Land Protected in Pinelands Area	49%	37%*	22*
Assessed Acres of Farmland	3,771	2,264	50
Building Permits Issued	61	37	30
Housing Transactions	467	84	7
Average Home Sale Price	\$319,363	\$286,205	40
Equalized Property Value (millions)	\$6,543.4	\$1,490.9	9
Effective Tax Rate	2.15	2.58	148
Average Residential Property Tax Bill	\$6,805	\$5,845	51
Per Capita Income (Estimate)	\$36,422	\$32,392	52
Estimated Unemployment Rate	6.7%	8.1%	142

Estimated Poverty Rate by Year



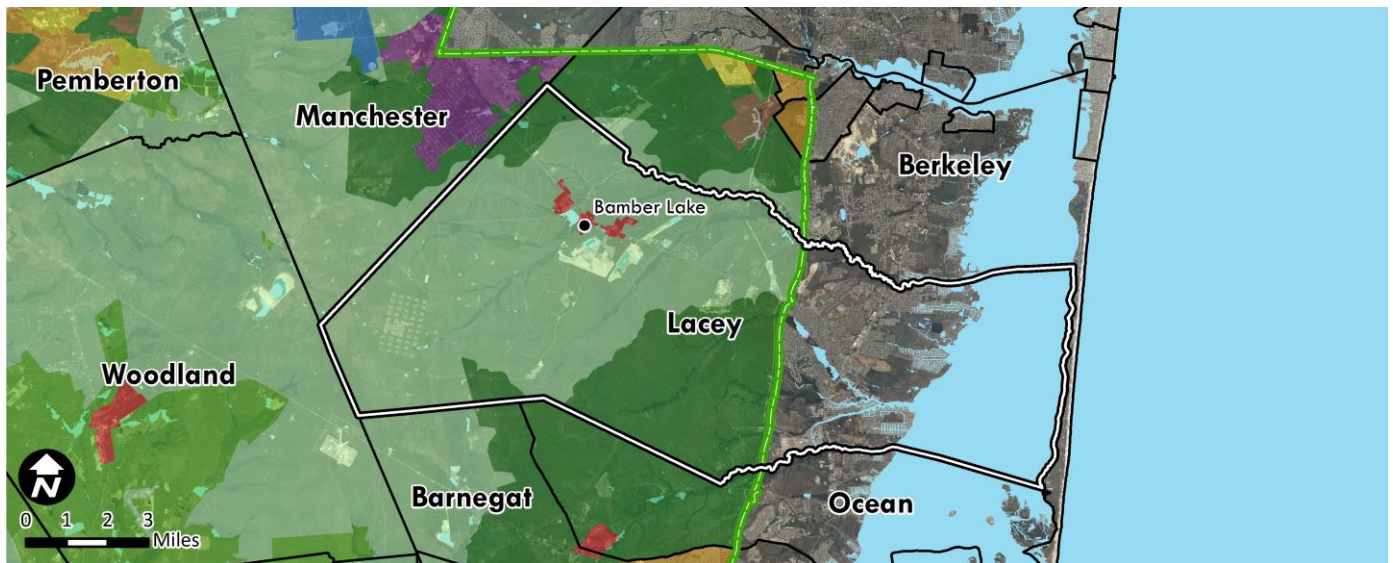
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
9,358	910	\$30,928

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

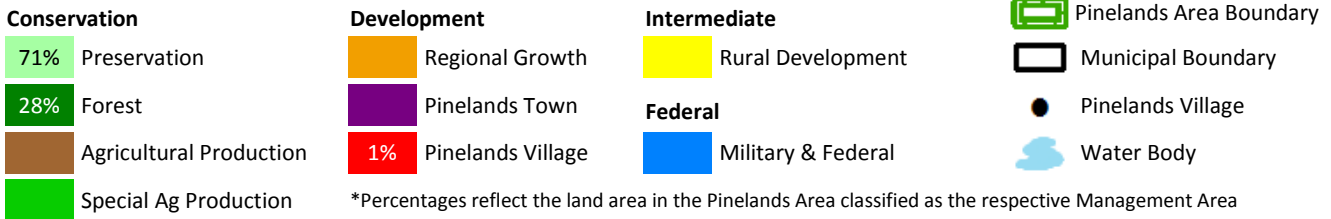
Lacey Township



Pinelands Area 2010 population: 550 (2% of total population)
 Pinelands Area acreage: 42,688 (67% of total acreage)

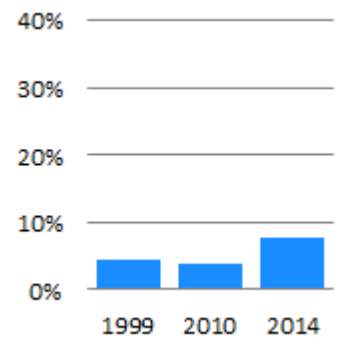


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	28,211	12,033	24
Population Density (per mile ²)	283	1,763	153
Population Change - 2010 to 2014	2.1%	-0.2%	21
% Land Protected in Pinelands Area	76%	37%*	7*
Assessed Acres of Farmland	6,304	2,264	31
Building Permits Issued	81	37	22
Housing Transactions	215	84	18
Average Home Sale Price	\$264,878	\$286,205	60
Equalized Property Value (millions)	\$3,787.6	\$1,490.9	22
Effective Tax Rate	1.86	2.58	160
Average Residential Property Tax Bill	\$5,332	\$5,845	109
Per Capita Income (Estimate)	\$33,188	\$32,392	76
Estimated Unemployment Rate	7.0%	8.1%	130

Estimated Poverty Rate by Year

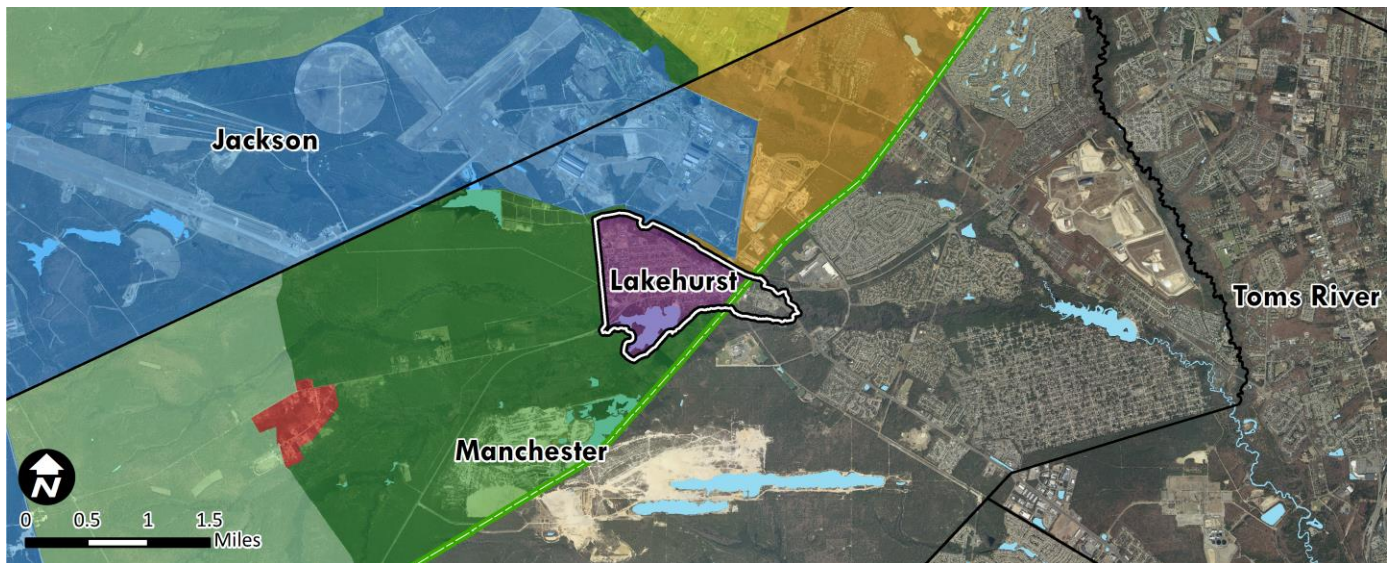


Private Sector Employment 5,279	Private Sector Establishments 564	Private Sector Avg. Annual Wages \$41,750
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

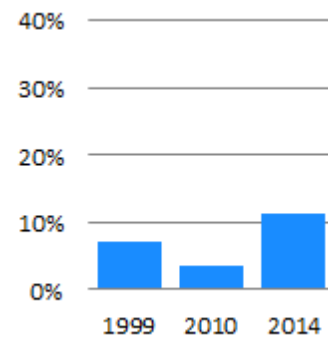
- Rural Development
- Federal**
- Military & Federal

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

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,713	12,033	148
Population Density (per mile ²)	2,744	1,763	53
Population Change - 2010 to 2014	2.2%	-0.2%	17
% Land Protected in Pinelands Area	13%	37%*	38*
Assessed Acres of Farmland	0	2,264	123
Building Permits Issued	12	37	92
Housing Transactions	3	84	187
Average Home Sale Price	\$170,667	\$286,205	138
Equalized Property Value (millions)	\$164.9	\$1,490.9	173
Effective Tax Rate	2.60	2.58	107
Average Residential Property Tax Bill	\$4,634	\$5,845	148
Per Capita Income (Estimate)	\$22,905	\$32,392	181
Estimated Unemployment Rate	9.2%	8.1%	56

Estimated Poverty Rate by Year



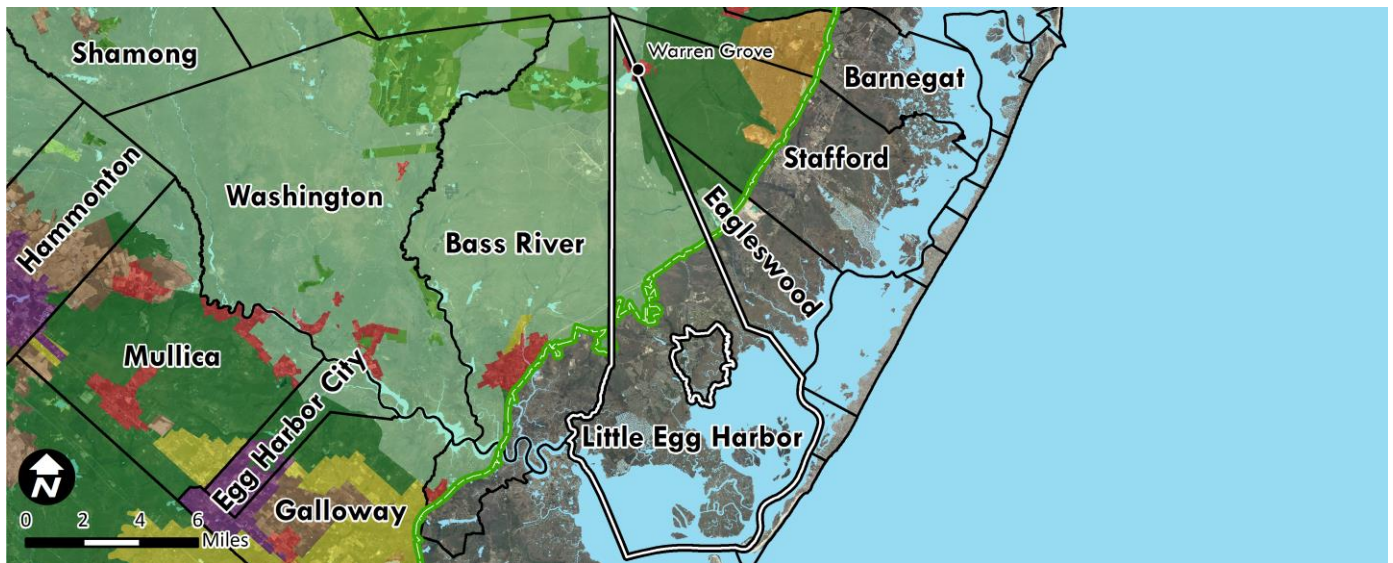
Private Sector Employment 742	Private Sector Establishments 95	Private Sector Avg. Annual Wages \$47,856
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

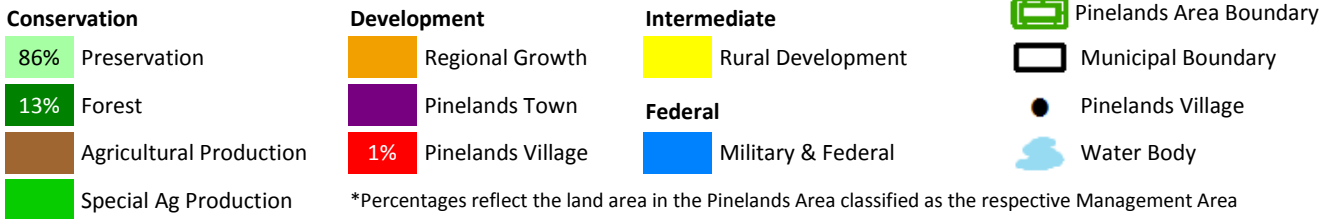
Little Egg Harbor Township



Pinelands Area 2010 population: 203 (1% of total population)
 Pinelands Area acreage: 11,582 (25% of total acreage)

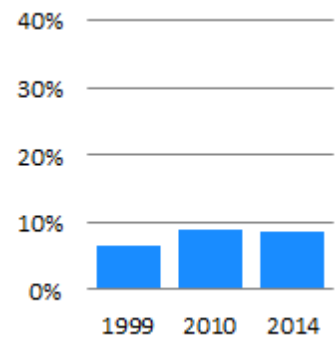


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	20,396	12,033	36
Population Density (per mile ²)	278	1,763	154
Population Change - 2010 to 2014	1.6%	-0.2%	28
% Land Protected in Pinelands Area	87%	37%*	2*
Assessed Acres of Farmland	538	2,264	82
Building Permits Issued	149	37	11
Housing Transactions	148	84	30
Average Home Sale Price	\$213,614	\$286,205	99
Equalized Property Value (millions)	\$2,365.0	\$1,490.9	38
Effective Tax Rate	2.18	2.58	141
Average Residential Property Tax Bill	\$4,518	\$5,845	154
Per Capita Income (Estimate)	\$27,806	\$32,392	128
Estimated Unemployment Rate	8.6%	8.1%	70

Estimated Poverty Rate by Year

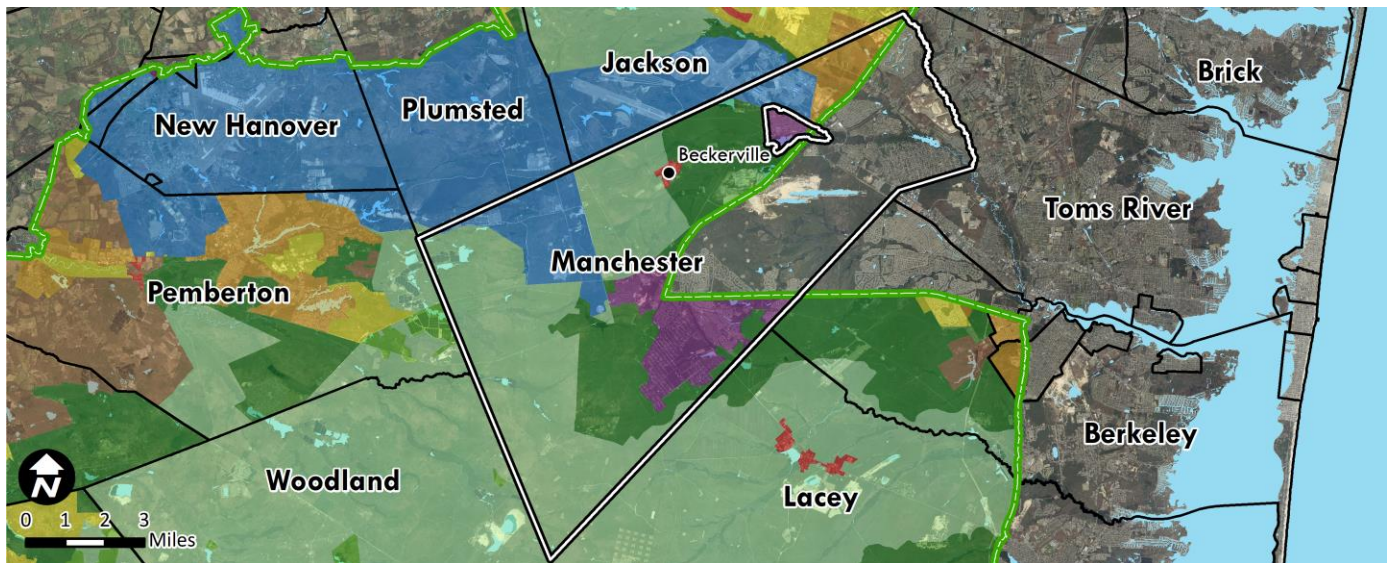


Private Sector Employment 1,770	Private Sector Establishments 223	Private Sector Avg. Annual Wages \$28,806
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

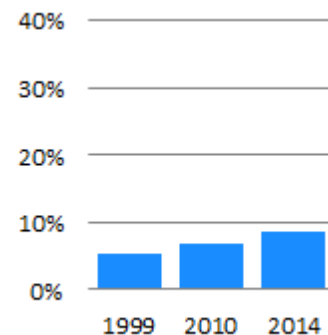
- 13% Military & Federal

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

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	43,555	12,033	12
Population Density (per mile ²)	526	1,763	131
Population Change - 2010 to 2014	1.1%	-0.2%	36
% Land Protected in Pinelands Area	52%	37%*	16*
Assessed Acres of Farmland	3,835	2,264	49
Building Permits Issued	5	37	124
Housing Transactions	498	84	6
Average Home Sale Price	\$168,280	\$286,205	143
Equalized Property Value (millions)	\$3,611.0	\$1,490.9	24
Effective Tax Rate	2.20	2.58	138
Average Residential Property Tax Bill	\$3,813	\$5,845	181
Per Capita Income (Estimate)	\$26,569	\$32,392	147
Estimated Unemployment Rate	9.1%	8.1%	59

Estimated Poverty Rate by Year



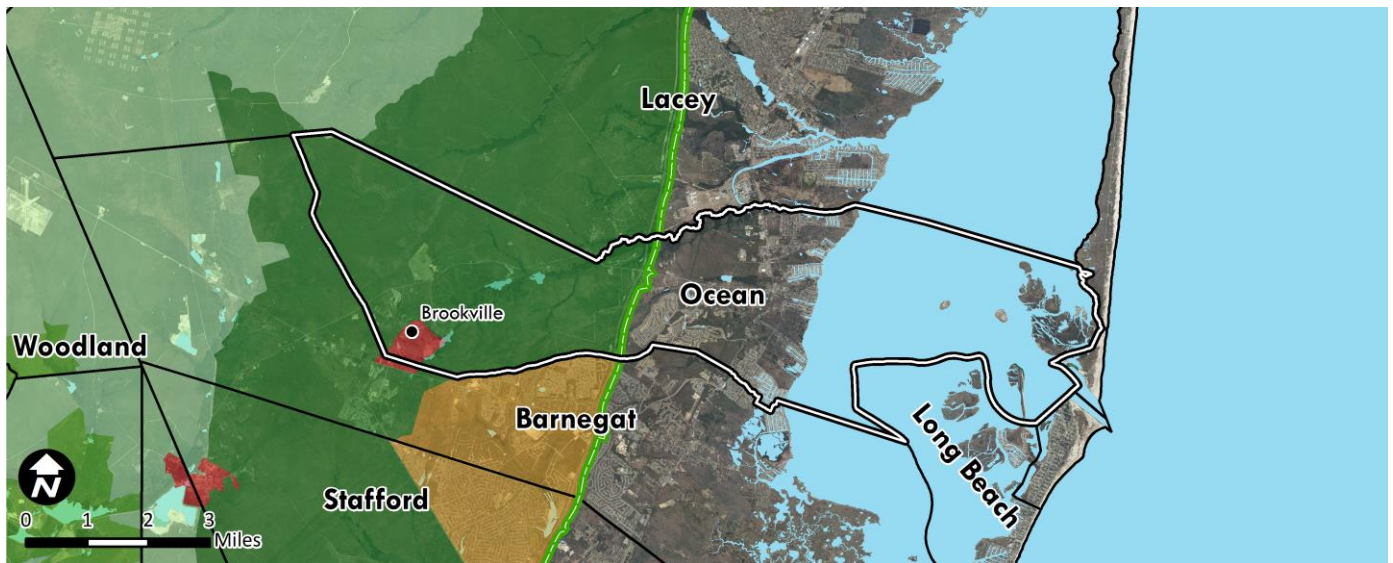
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
3,797	308	\$33,044

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

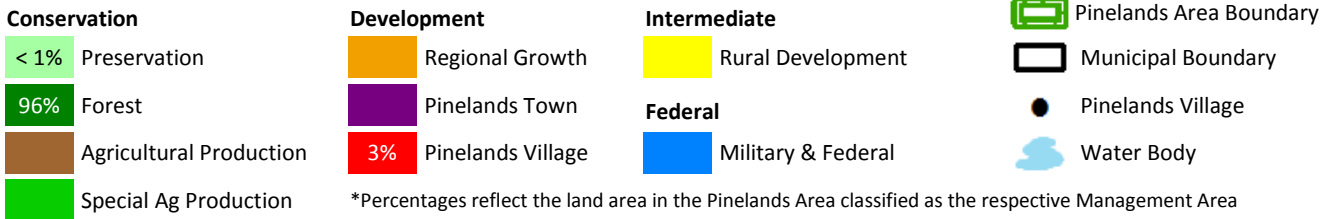
Ocean Township



Pinelands Area 2010 population: 142 (2% of total population)
 Pinelands Area acreage: 8,233 (41% of total acreage)

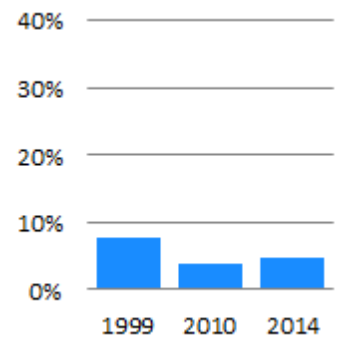


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	8,658	12,033	76
Population Density (per mile ²)	274	1,763	155
Population Change - 2010 to 2014	3.9%	-0.2%	7
% Land Protected in Pinelands Area	50%	37%*	20*
Assessed Acres of Farmland	1,915	2,264	63
Building Permits Issued	19	37	67
Housing Transactions	94	84	57
Average Home Sale Price	\$292,864	\$286,205	45
Equalized Property Value (millions)	\$1,321.5	\$1,490.9	64
Effective Tax Rate	1.76	2.58	167
Average Residential Property Tax Bill	\$4,839	\$5,845	134
Per Capita Income (Estimate)	\$36,095	\$32,392	55
Estimated Unemployment Rate	8.4%	8.1%	77

Estimated Poverty Rate by Year



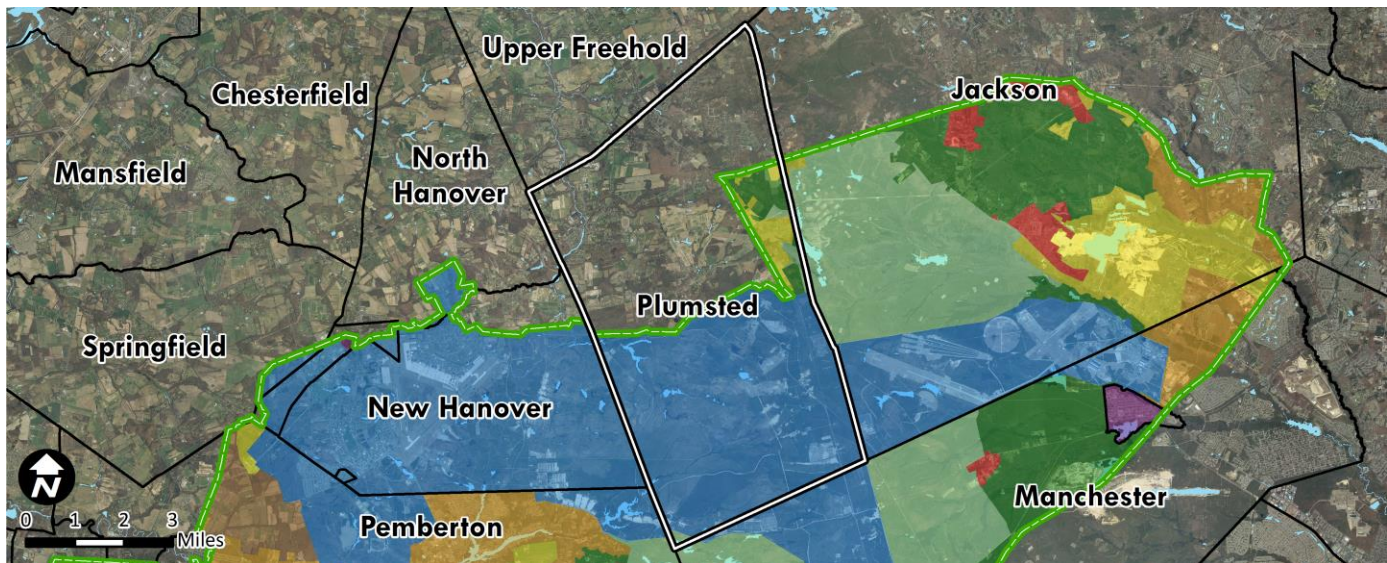
Private Sector Employment 1,227	Private Sector Establishments 128	Private Sector Avg. Annual Wages \$31,488
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

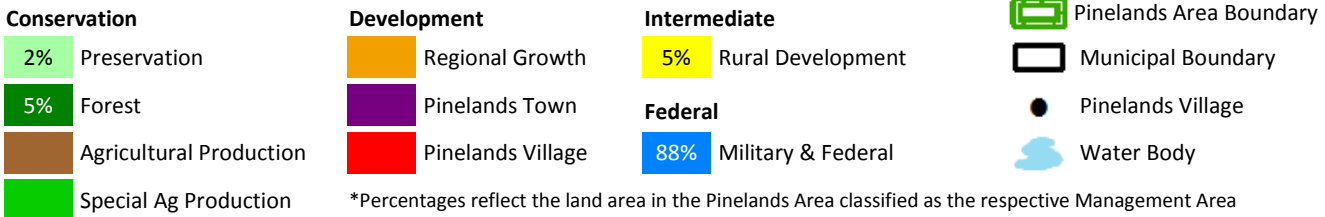
Plumsted Township



Pinelands Area 2010 population: 451 (5% of total population)
 Pinelands Area acreage: 13,423 (53% of total acreage)

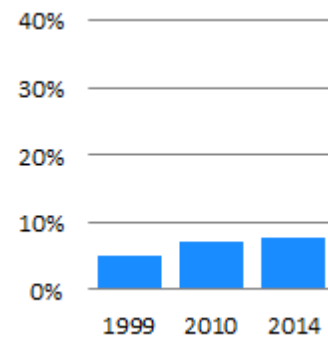


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	8,584	12,033	78
Population Density (per mile ²)	217	1,763	166
Population Change - 2010 to 2014	1.9%	-0.2%	24
% Land Protected in Pinelands Area	6%	37%*	42*
Assessed Acres of Farmland	5,041	2,264	37
Building Permits Issued	16	37	74
Housing Transactions	46	84	93
Average Home Sale Price	\$326,724	\$286,205	35
Equalized Property Value (millions)	\$832.0	\$1,490.9	89
Effective Tax Rate	2.03	2.58	153
Average Residential Property Tax Bill	\$6,126	\$5,845	76
Per Capita Income (Estimate)	\$34,652	\$32,392	65
Estimated Unemployment Rate	7.7%	8.1%	101

Estimated Poverty Rate by Year



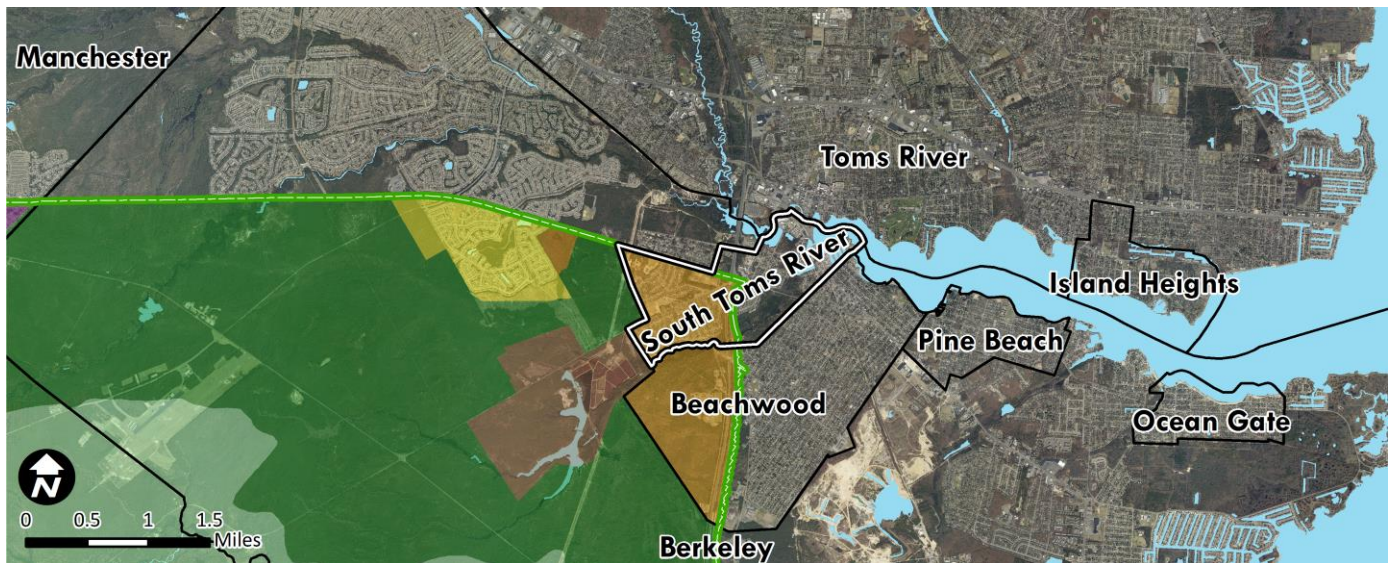
Private Sector Employment 735	Private Sector Establishments 126	Private Sector Avg. Annual Wages \$31,763
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

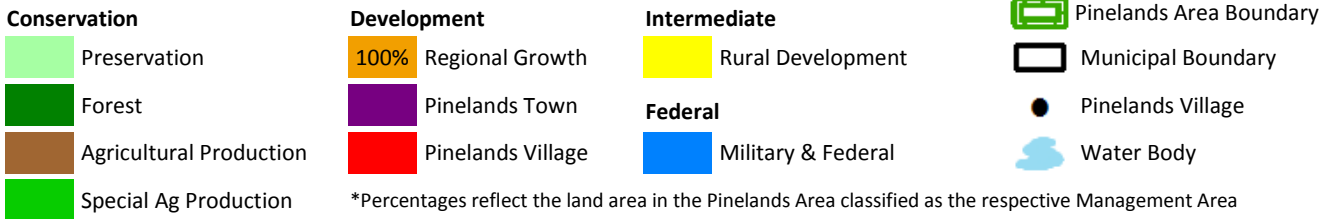
South Toms River Borough



Pinelands Area 2010 population: 2,586 (70% of total population)
 Pinelands Area acreage: 376 (47% of total acreage)

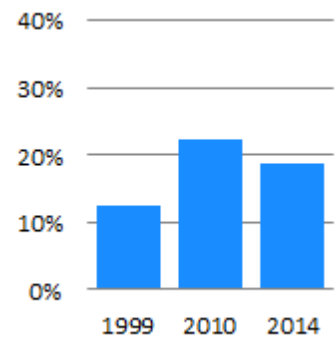


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	3,762	12,033	130
Population Density (per mile ²)	3,017	1,763	45
Population Change - 2010 to 2014	2.1%	-0.2%	18
% Land Protected in Pinelands Area	0%	37%*	46*
Assessed Acres of Farmland	0	2,264	123
Building Permits Issued	9	37	104
Housing Transactions	15	84	143
Average Home Sale Price	\$157,385	\$286,205	154
Equalized Property Value (millions)	\$227.1	\$1,490.9	162
Effective Tax Rate	2.50	2.58	111
Average Residential Property Tax Bill	\$4,373	\$5,845	160
Per Capita Income (Estimate)	\$20,816	\$32,392	187
Estimated Unemployment Rate	9.9%	8.1%	39

Estimated Poverty Rate by Year



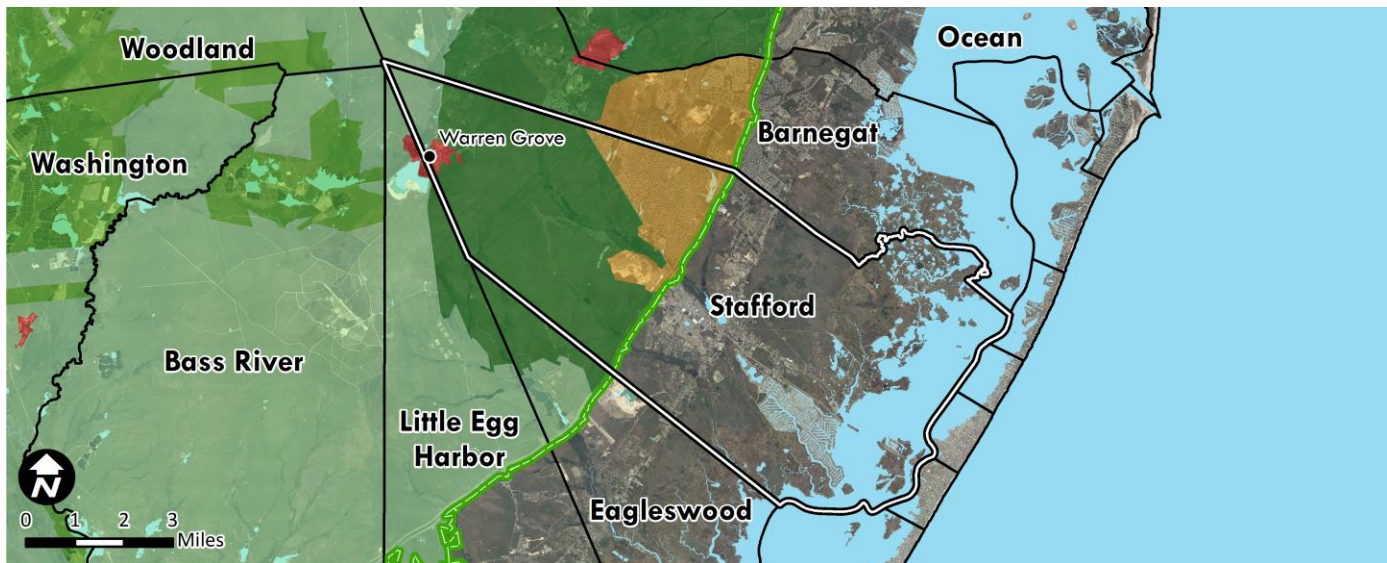
Private Sector Employment 478	Private Sector Establishments 58	Private Sector Avg. Annual Wages \$34,585
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

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

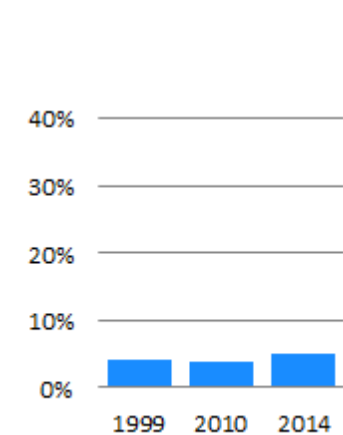
Pinelands Village

Water Body

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

2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	26,809	12,033	26
Population Density (per mile ²)	491	1,763	134
Population Change - 2010 to 2014	1.0%	-0.2%	40
% Land Protected in Pinelands Area	70%	37%*	9*
Assessed Acres of Farmland	461	2,264	83
Building Permits Issued	284	37	4
Housing Transactions	108	84	48
Average Home Sale Price	\$256,514	\$286,205	67
Equalized Property Value (millions)	\$3,928.5	\$1,490.9	20
Effective Tax Rate	2.17	2.58	142
Average Residential Property Tax Bill	\$5,518	\$5,845	95
Per Capita Income (Estimate)	\$33,192	\$32,392	75
Estimated Unemployment Rate	7.1%	8.1%	125

Estimated Poverty Rate by Year



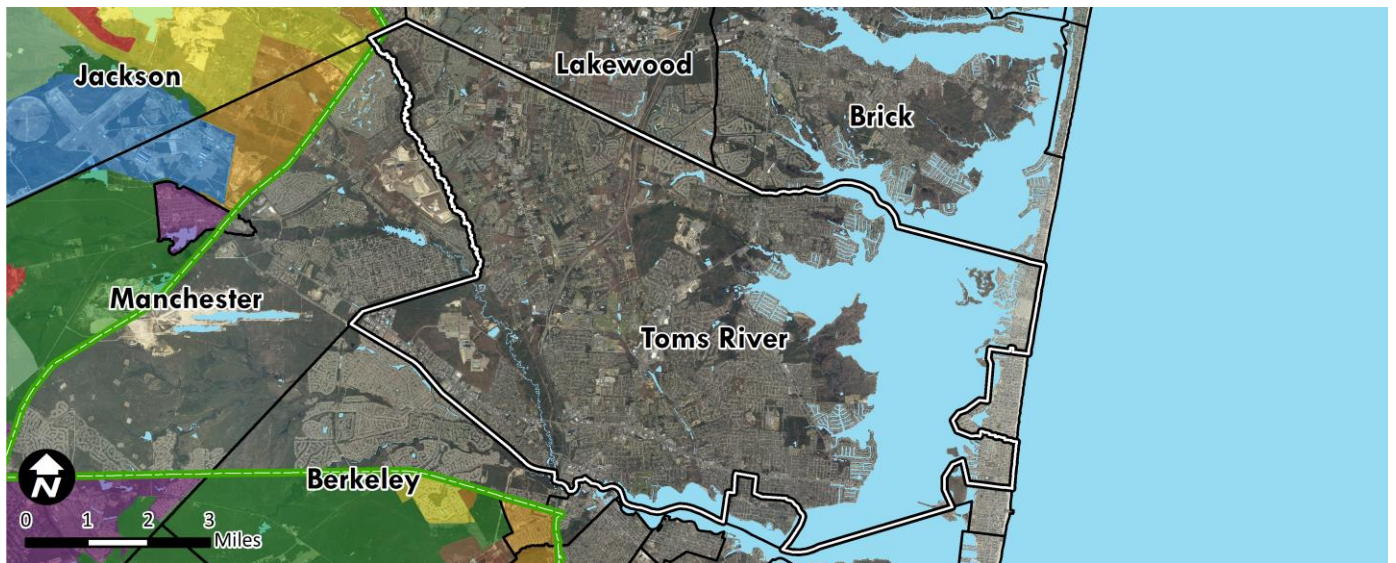
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
7,827	640	\$34,686

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

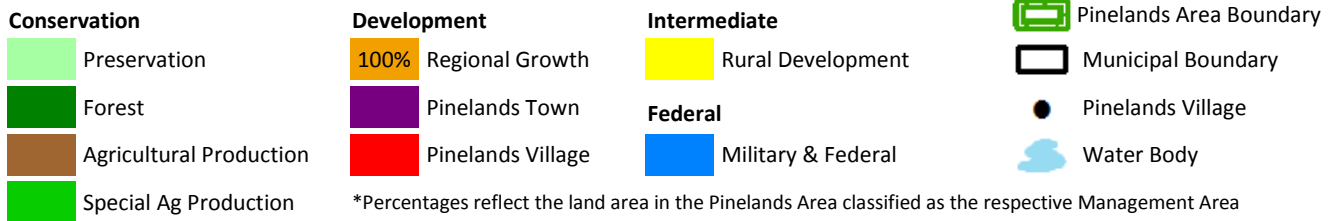
Toms River Township



Pinelands Area 2010 population: 0 (0% of total population)
 Pinelands Area acreage: 13 (< 1% of total acreage)

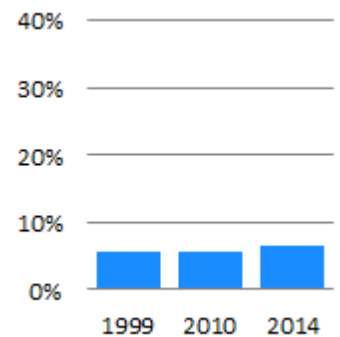


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	91,250	12,033	2
Population Density (per mile ²)	1,712	1,763	81
Population Change - 2010 to 2014	< 0.1%	-0.2%	70
% Land Protected in Pinelands Area	83%	37%*	4*
Assessed Acres of Farmland	320	2,264	87
Building Permits Issued	803	37	1
Housing Transactions	319	84	11
Average Home Sale Price	\$274,870	\$286,205	55
Equalized Property Value (millions)	\$14,088.1	\$1,490.9	1
Effective Tax Rate	1.90	2.58	158
Average Residential Property Tax Bill	\$5,298	\$5,845	112
Per Capita Income (Estimate)	\$35,030	\$32,392	61
Estimated Unemployment Rate	6.7%	8.1%	144

Estimated Poverty Rate by Year



Private Sector Employment
32,334

Private Sector Establishments
2,802

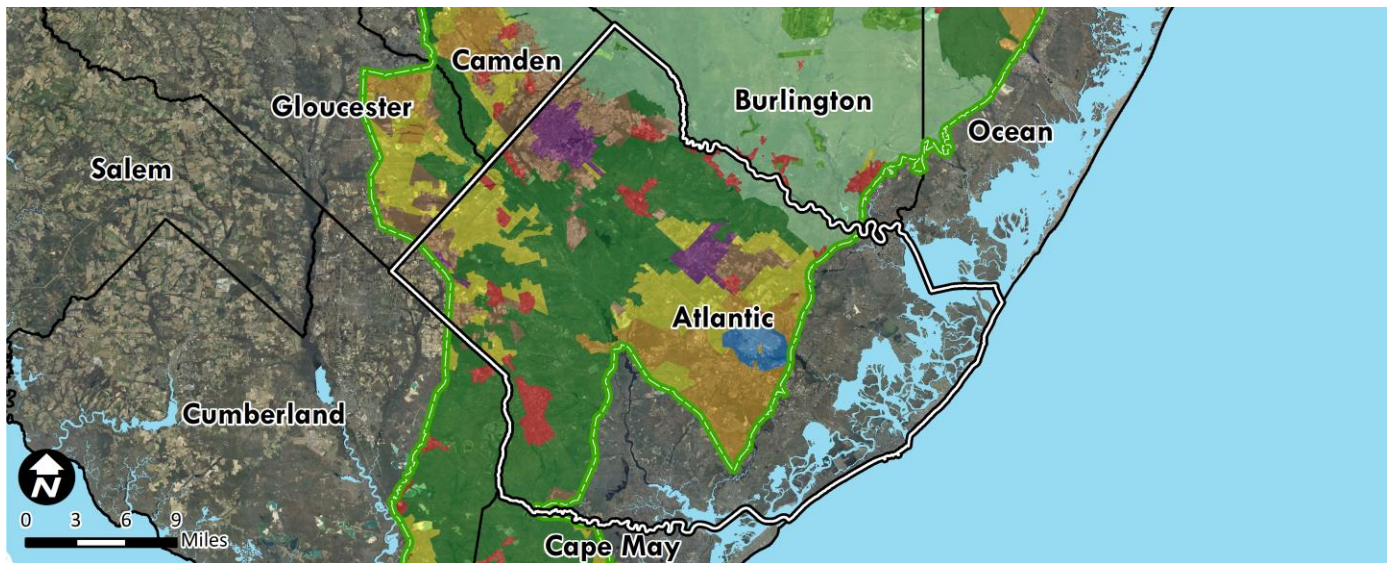
Private Sector Avg. Annual Wages
\$39,951

*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

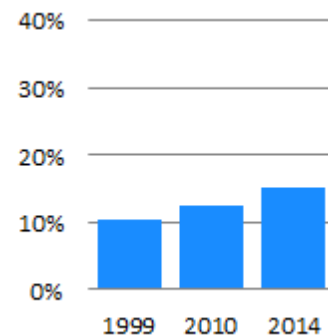
- 17% Rural Development
- Federal**
- 2% Military & Federal

- Pinelands Area Boundary
- County Boundary
- Pinelands Village
- Water Body

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

2014 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	275,209	303,834	5
Population Density (per mile ²)	450	713	5
Population Change - 2010 to 2014	0.2%	-0.1%	4
% Land Protected in Pinelands Area	29%	46%*	6*
Assessed Acres of Farmland	35,670	57,162	5
Building Permits Issued	722	945	4
Housing Transactions	1,475	2,112	6
Average Home Sale Price	\$294,518	\$275,306	3
Equalized Property Value (millions)	\$40,696.5	\$37,635.6	4
Average Effective Tax Rate	2.47	2.51	6
Average Residential Property Tax Bill	\$6,545	\$5,534	1
Per Capita Income (Estimate)	\$26,237	\$29,574	7
Estimated Unemployment Rate	10.4%	8.6%	2

Estimated Poverty Rate by Year



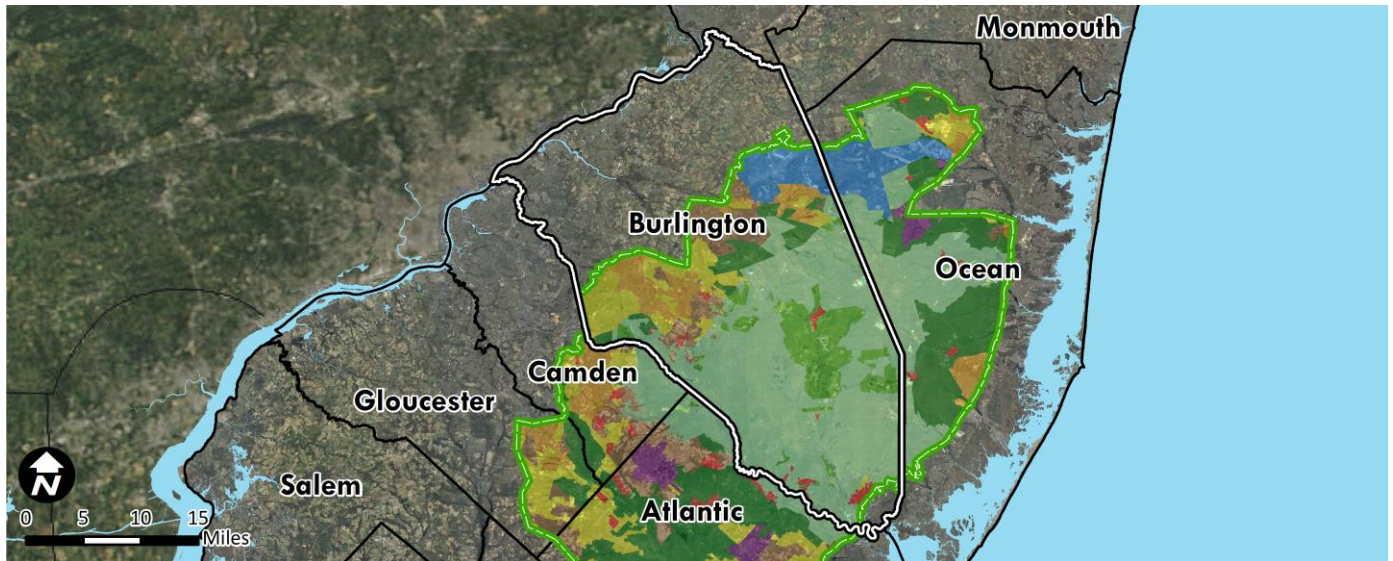
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
107,020	6,274	\$36,476

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

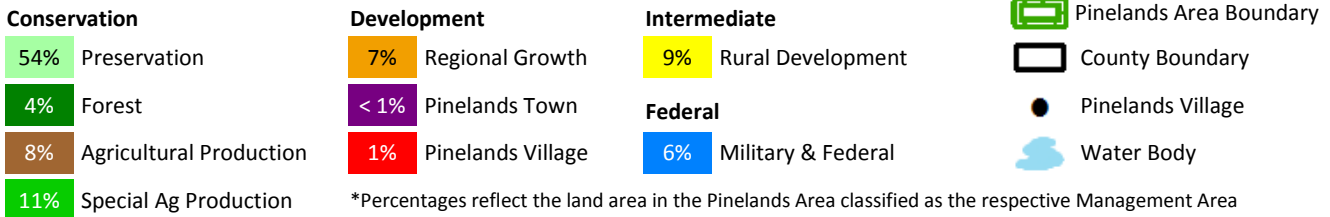
Burlington County



Pinelands Area 2010 population: 96,388 (21% of total population)
 Pinelands Area acreage: 334,224 (64% of total acreage)

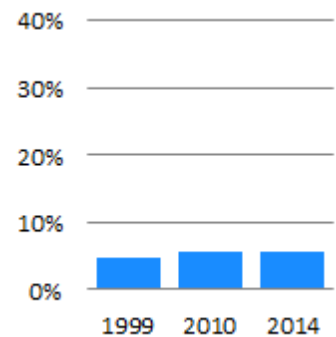


Pinelands Management Areas



2014 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	449,722	303,834	3
Population Density (per mile ²)	549	713	4
Population Change - 2010 to 2014	0.2%	-0.1%	5
% Land Protected in Pinelands Area	57%	46%*	2*
Assessed Acres of Farmland	118,293	57,162	1
Building Permits Issued	1,000	945	3
Housing Transactions	2,814	2,112	3
Average Home Sale Price	\$269,152	\$275,306	4
Equalized Property Value (millions)	\$45,672.9	\$37,635.6	3
Average Effective Tax Rate	2.55	2.51	5
Average Residential Property Tax Bill	\$6,289	\$5,534	2
Per Capita Income (Estimate)	\$36,600	\$29,574	1
Estimated Unemployment Rate	6.3%	8.6%	8

Estimated Poverty Rate by Year



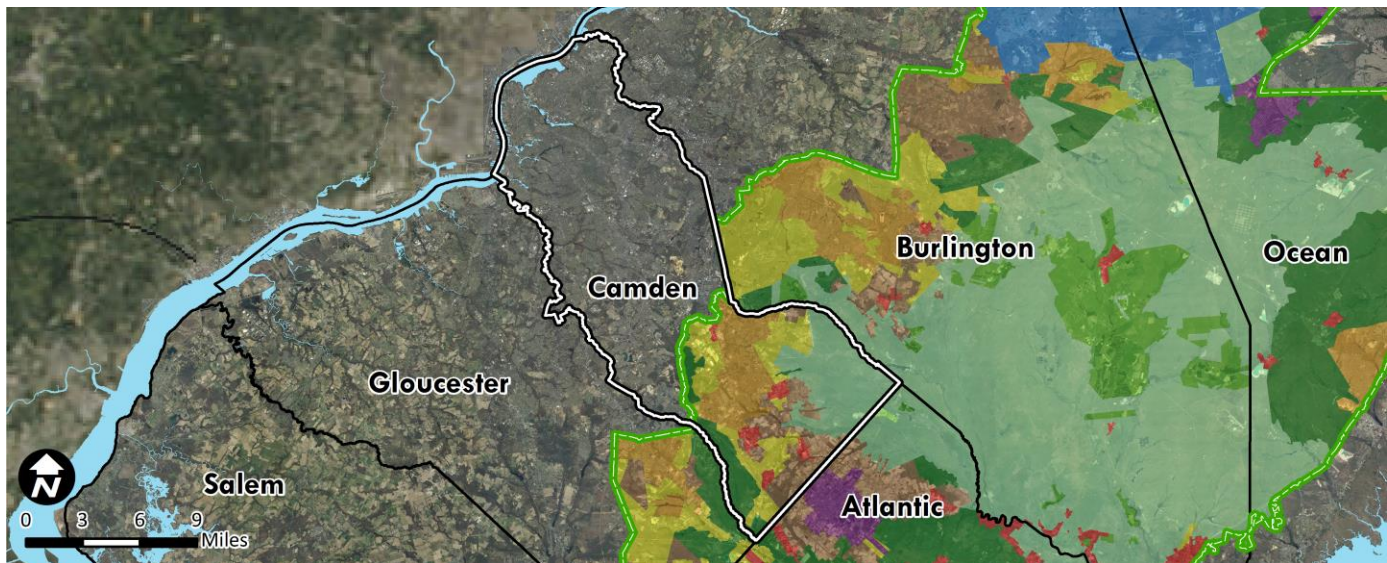
Private Sector Employment 169,000	Private Sector Establishments 10,446	Private Sector Avg. Annual Wages \$43,417
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*This Figure captures the 7 Pinelands Area counties only, not Salem County.

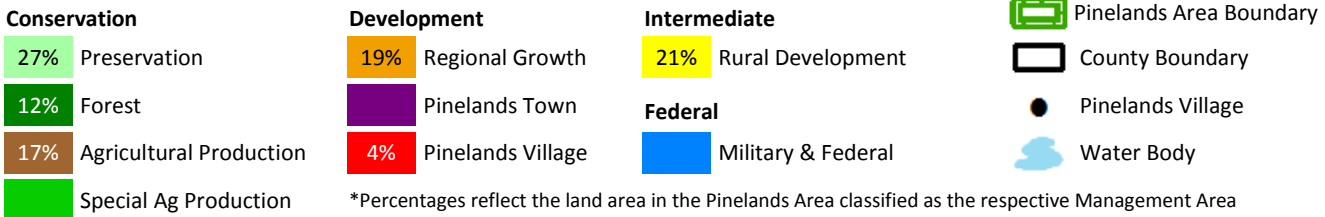
Camden County



Pinelands Area 2010 population: 30,475 (6% of total population)
 Pinelands Area acreage: 54,907 (38% of total acreage)

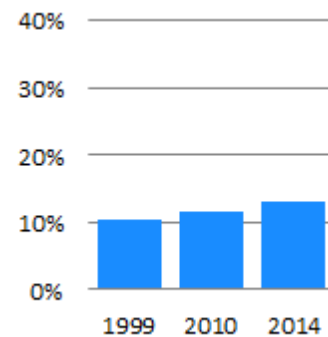


Pinelands Management Areas



2014 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	511,038	303,834	2
Population Density (per mile ²)	2,246	713	1
Population Change - 2010 to 2014	-0.5%	-0.1%	6
% Land Protected in Pinelands Area	44%	46%*	5*
Assessed Acres of Farmland	9,250	57,162	8
Building Permits Issued	1,506	945	2
Housing Transactions	3,016	2,112	2
Average Home Sale Price	\$214,385	\$275,306	6
Equalized Property Value (millions)	\$36,640.2	\$37,635.6	5
Average Effective Tax Rate	3.55	2.51	1
Average Residential Property Tax Bill	\$6,099	\$5,534	4
Per Capita Income (Estimate)	\$29,742	\$29,574	4
Estimated Unemployment Rate	7.5%	8.6%	5

Estimated Poverty Rate by Year

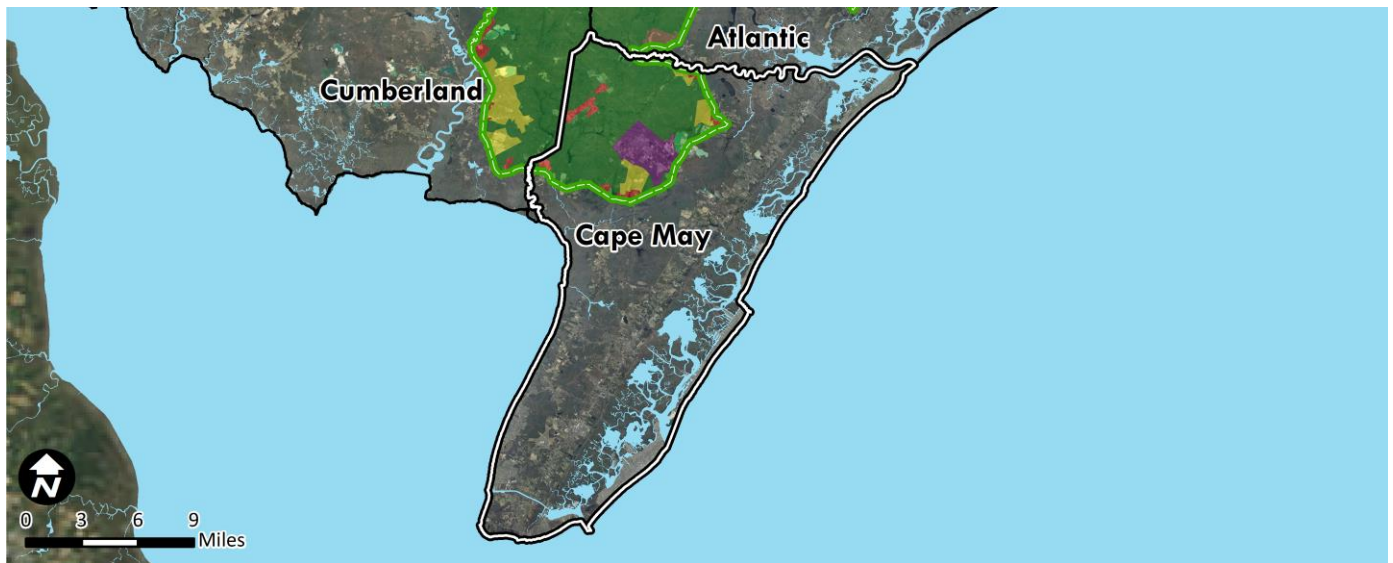


Private Sector Employment 162,532	Private Sector Establishments 11,259	Private Sector Avg. Annual Wages \$38,950
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*This Figure captures the 7 Pinelands Area counties only, not Salem County.

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

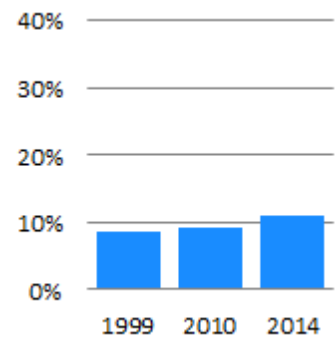
- 6% Rural Development
- Federal**
- Military & Federal

- Pinelands Area Boundary
- County Boundary
- Pinelands Village
- Water Body

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

2014 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	95,344	303,834	7
Population Density (per mile ²)	334	713	6
Population Change - 2010 to 2014	-2.0%	-0.1%	7
% Land Protected in Pinelands Area	53%	46%*	3*
Assessed Acres of Farmland	10,046	57,162	7
Building Permits Issued	638	945	5
Housing Transactions	1,926	2,112	5
Average Home Sale Price	\$562,917	\$275,306	1
Equalized Property Value (millions)	\$46,888.9	\$37,635.6	2
Average Effective Tax Rate	1.19	2.51	8
Average Residential Property Tax Bill	\$4,651	\$5,534	7
Per Capita Income (Estimate)	\$31,696	\$29,574	3
Estimated Unemployment Rate	12.0%	8.6%	1

Estimated Poverty Rate by Year



Private Sector Employment
31,892

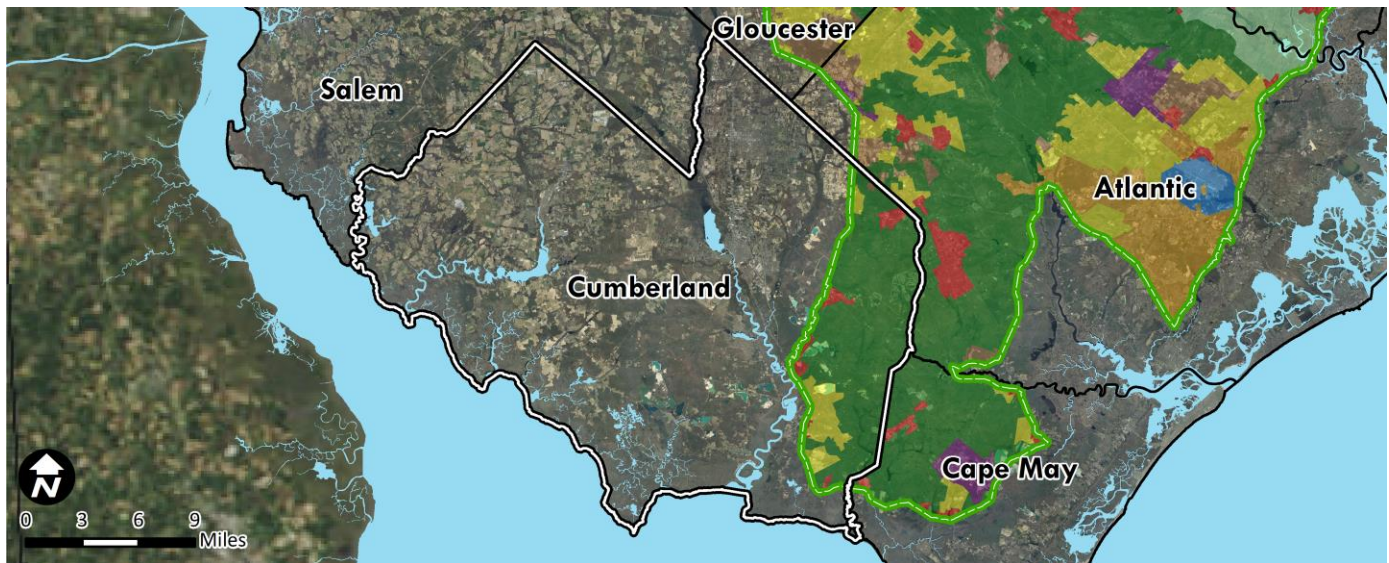
Private Sector Establishments
3,719

Private Sector Avg. Annual Wages
\$29,503

*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

County Boundary

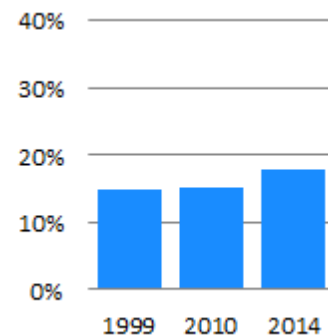
Pinelands Village

Water Body

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

2014 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	157,389	303,834	6
Population Density (per mile ²)	313	713	7
Population Change - 2010 to 2014	0.3%	-0.1%	3
% Land Protected in Pinelands Area	52%	46%*	4*
Assessed Acres of Farmland	87,351	57,162	3
Building Permits Issued	212	945	7
Housing Transactions	571	2,112	7
Average Home Sale Price	\$147,917	\$275,306	8
Equalized Property Value (millions)	\$8,638.9	\$37,635.6	7
Average Effective Tax Rate	2.67	2.51	4
Average Residential Property Tax Bill	\$3,797	\$5,534	8
Per Capita Income (Estimate)	\$22,490	\$29,574	8
Estimated Unemployment Rate	9.9%	8.6%	3

Estimated Poverty Rate by Year



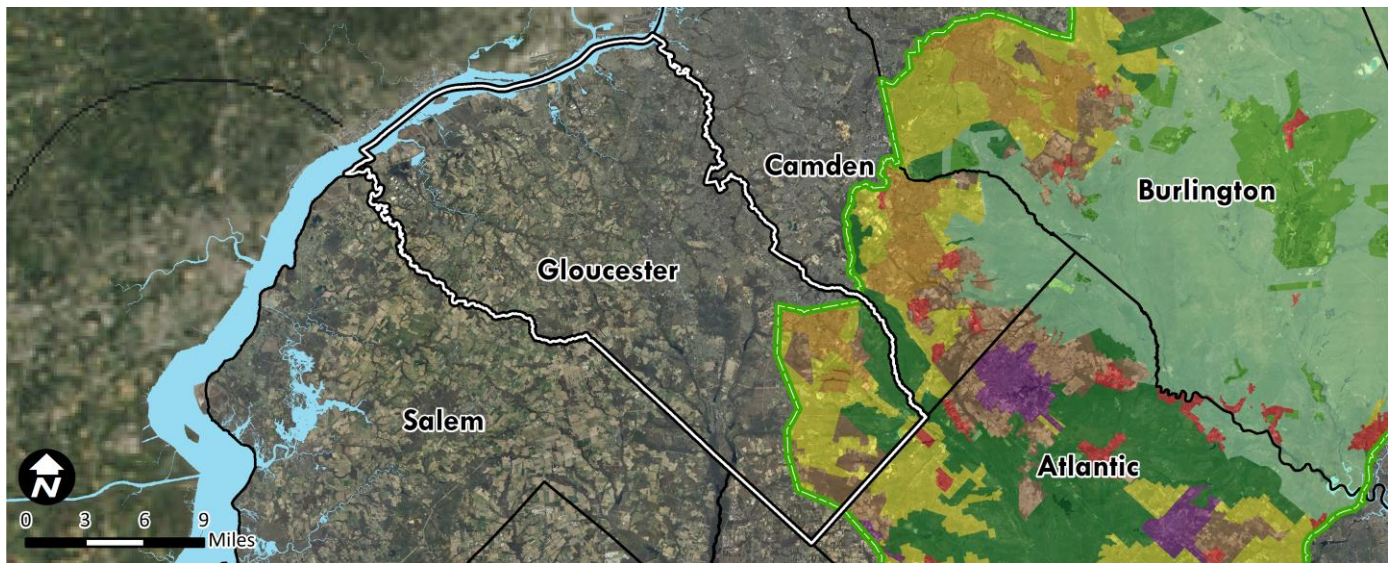
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
45,489	2,913	\$36,334

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

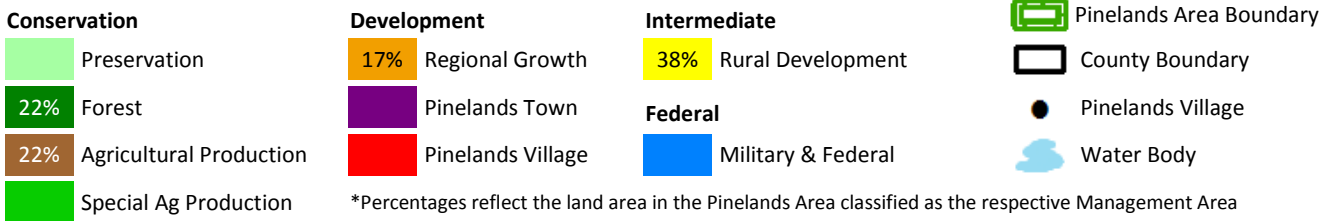
Gloucester County



Pinelands Area 2010 population: 20,487 (7% of total population)
 Pinelands Area acreage: 33,581 (16% of total acreage)

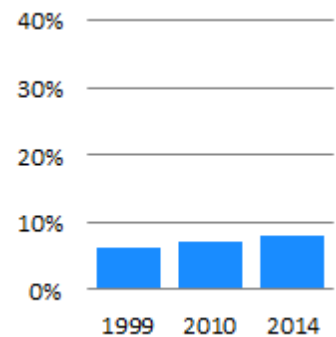


Pinelands Management Areas



2014 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	290,951	303,834	4
Population Density (per mile ²)	864	713	2
Population Change - 2010 to 2014	0.9%	-0.1%	2
% Land Protected in Pinelands Area	28%	46%*	7*
Assessed Acres of Farmland	59,564	57,162	4
Building Permits Issued	491	945	6
Housing Transactions	1,934	2,112	4
Average Home Sale Price	\$215,718	\$275,306	5
Equalized Property Value (millions)	\$25,436.8	\$37,635.6	6
Average Effective Tax Rate	3.18	2.51	2
Average Residential Property Tax Bill	\$6,232	\$5,534	3
Per Capita Income (Estimate)	\$32,996	\$29,574	2
Estimated Unemployment Rate	7.1%	8.6%	7

Estimated Poverty Rate by Year



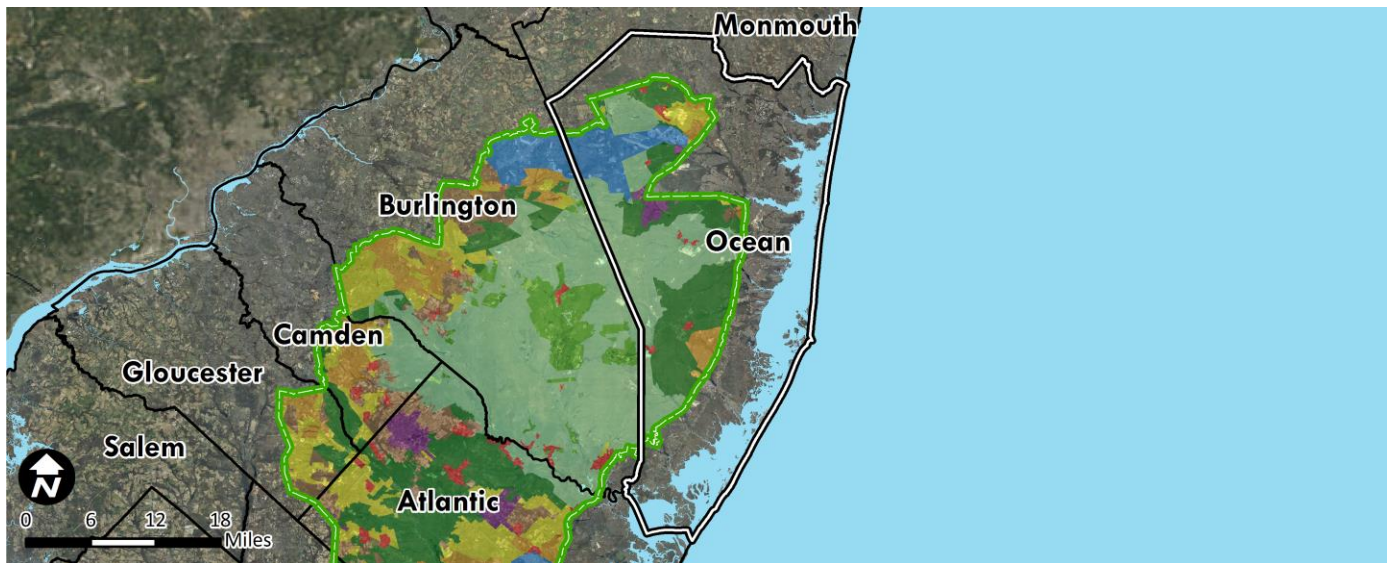
Private Sector Employment 80,894	Private Sector Establishments 5,893	Private Sector Avg. Annual Wages \$40,689
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*This Figure captures the 7 Pinelands Area counties only, not Salem County.

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

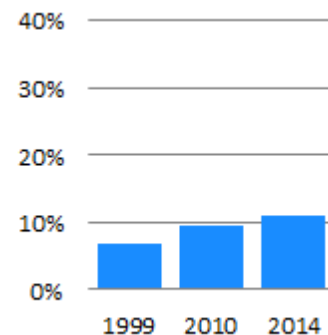
- 3% Rural Development
- Federal**
- 12% Military & Federal

- Pinelands Area Boundary
- County Boundary
- Pinelands Village
- Water Body

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

2014 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	586,301	303,834	1
Population Density (per mile ²)	773	713	3
Population Change - 2010 to 2014	1.7%	-0.1%	1
% Land Protected in Pinelands Area	59%	46%*	1*
Assessed Acres of Farmland	23,133	57,162	6
Building Permits Issued	2,937	945	1
Housing Transactions	4,903	2,112	1
Average Home Sale Price	\$306,258	\$275,306	2
Equalized Property Value (millions)	\$91,918.6	\$37,635.6	1
Average Effective Tax Rate	1.71	2.51	7
Average Residential Property Tax Bill	\$5,719	\$5,534	5
Per Capita Income (Estimate)	\$29,632	\$29,574	5
Estimated Unemployment Rate	7.2%	8.6%	6

Estimated Poverty Rate by Year



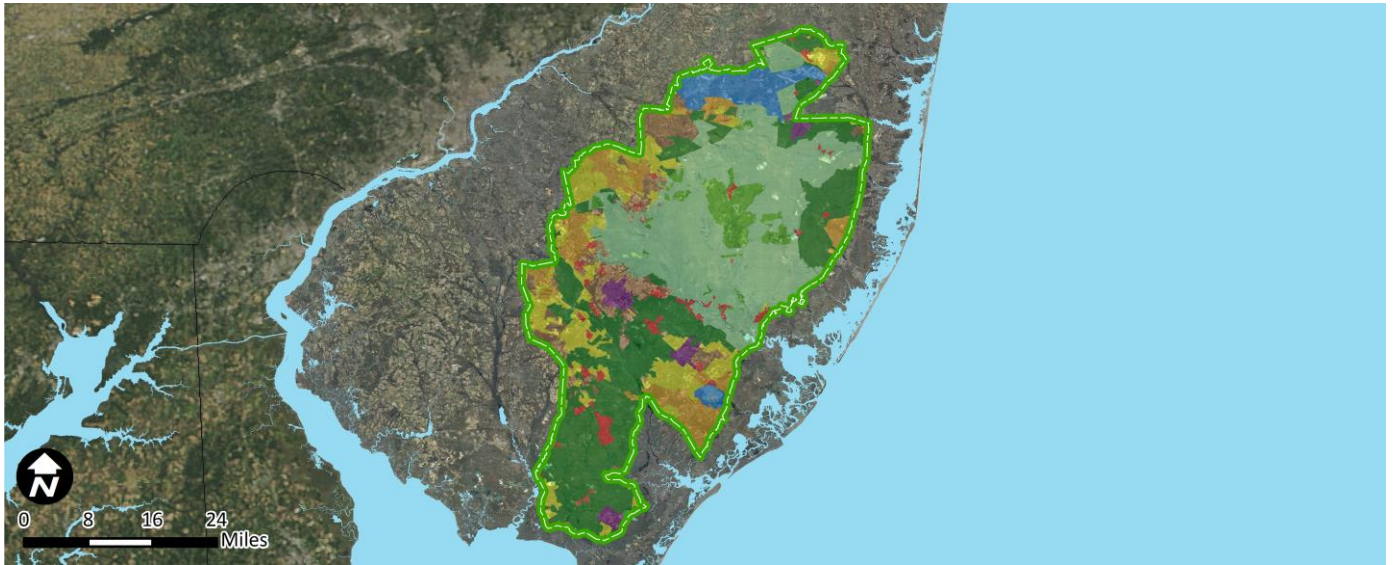
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
131,169	12,147	\$33,589

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

Pinelands Area

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

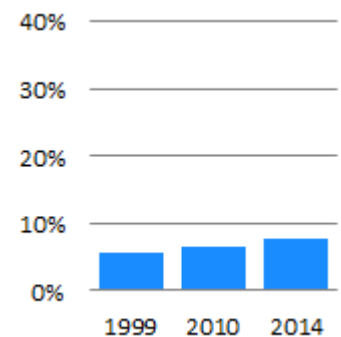
- 12% Rural Development
- Federal**
- 5% Military & Federal

- Pinelands Area Boundary
- Water Body

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

2014 Variables	Pinelands Municipal Value	Non-Pinelands Municipal Value	New Jersey Value
Population Estimate	705,262	1,725,407	8,938,175
Population Density (per mile ²)	329	974	1,137
Population Change - 2010 to 2014	1.0%	0.1%	2.0%
% Land Protected in Pinelands Area	100%	-	-
Assessed Acres of Farmland	170,196	287,098	961,997
Building Permits Issued	1,312	6,245	28,155
Housing Transactions	4,964	11,929	57,612
Average Home Sale Price	\$229,717	\$321,415	\$391,989
Avg. Equalized Prop. Value (millions)	\$1,456.8	\$1,501.2	\$2,063.7
Average Effective Tax Rate	2.41	2.63	2.53
Average Residential Property Tax Bill	\$5,144	\$6,057	\$8,161
Per Capita Income (Estimate)	\$30,080	\$33,093	\$35,673
Estimated Unemployment Rate	8.0%	7.7%	6.6%

Pinelands Municipalities Estimated Poverty Rate by Year



Private Sector Employment 143,934	Private Sector Establishments 12,678	Private Sector Avg. Annual Wages \$37,766
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