

New Jersey Pinelands Commission

# Long Term Economic Monitoring Program



## 2013 Annual Report

Mark S. Lohbauer, Chairman

Nancy Wittenberg, Executive Director

**NEW JERSEY PINELANDS LONG-TERM ECONOMIC  
MONITORING PROGRAM  
*2013 ANNUAL REPORT***

**April 2014**

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**Larry L. Liggett, Land Use and Technology Programs Director**

**Susan R. Grogan, Chief Planner**

Pinelands Commission  
P.O. Box 359  
New Lisbon, New Jersey 08064  
(609) 894-7300  
<http://www.nj.gov/pinelands>

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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:

The Pinelands Commission  
P.O. Box 359  
New Lisbon, New Jersey 08064

Requests can also be made *via* phone at (609) 894-7300 or email at [info@njpines.state.nj.us](mailto:info@njpines.state.nj.us).

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# Executive Summary

This report covers data from 2012, and it provides the results of the ongoing economic monitoring program that tracks economic conditions in the Pinelands Region. The Pinelands is the nation's first Federal Reserve. Established in 1978, it covers an area of more than one million acres in the heart of southern New Jersey. The Pinelands Comprehensive Management Plan (CMP) was adopted in 1981. The Plan establishes minimum standards for land use throughout the region. These standards are implemented at the local level through municipal ordinances.

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

## Population

The population in the Pinelands continues to grow. The 23<sup>rd</sup> United States Census issued in 2010 showed that the Pinelands municipal aggregate population has reached 698,092 people; a 13.3% increase over the population reported by the 2000 census (1.3% per year). More recently, the 2012 population estimates show that the Pinelands municipal aggregate increased by 2,068 people from 2011. This equates to growth of 0.3%. These numbers show that population growth in the Pinelands and the Non-Pinelands is slowing, yet growth in the Pinelands is still outpacing growth in the Non-Pinelands.

Census block data is used for analyzing population growth at a more detailed level. It provides greater accuracy in determining the number of people who live *in the Pinelands Area* and not just in a Pinelands municipality. In 2010, census data shows that 312,971 people lived *inside* the boundary; a 13.1% increase from 2000. In contrast, the areas outside the boundary, but inside a municipality that has land in the Pinelands Area, grew by 10.7%.

Age demographic data show that the Pinelands, and New Jersey as a whole, has an aging population. In 2012, the average median age of the people living in the Pinelands Area was 42 years old; just ten years earlier, the average median municipal age was 39. The Non-Pinelands average median age in 2012 was 42 years old.

## Real Estate

In the real estate market, the decline that began in 2004 is beginning to show signs of recovering, albeit much slower in the Pinelands. In 2012, the number of residential building permits issued by the Pinelands municipalities increased to 25 permits (11.9%). However, housing transactions declined by 3.3% while the Non-Pinelands and the state, overall, saw increases in the number of transactions. Despite some

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

increased real estate activity throughout the state, average selling prices continued to decrease in the Pinelands, the Non-Pinelands, and the state. The 2012 average home selling price was \$225,101 in the Pinelands; a decrease of 7.3% from 2011.

## **Economic**

The 2012 estimated per capita income in the Pinelands decreased by 5.1% from 2010 to \$29,176. This decline in per capita income is also reflected by the Non-Pinelands and the state. Unemployment rates increased in 2012 after a brief decline in 2011. The unemployment rate in the Pinelands reached 10.7%. This is higher than the state's 9.5% unemployment rate, but lower than the 11.0% rate in the Non-Pinelands.

Based on block-group level data, employment in public administration made up the largest percentage of jobs in the Pinelands at 15.3%. A total of 14.4% of those employed in the Pinelands worked in health care (the second largest sector) while 12.7% worked in retail trade (the third largest sector). Overall, municipal employment figures were down in 2012 by 1% while the numbers of establishments were also down by 3%.

In agriculture, the total Pinelands municipal acreage devoted to agriculture declined by 0.4% in 2012 to a total of 174,254 acres. Berry production saw an increase in prices for 2012, with cranberries increasing by 4.5% to 54¢ per pound and blueberries increasing by 1¢ to \$1.57 per pound.

## **Municipal Finance**

Taxes collected by municipalities are affected by both the valuation of real estate and by the tax rate that is applied to this real estate. In 2012, the average residential property tax bill in the Pinelands municipalities was \$4,940; this is a continuation of the decrease seen in 2011 (down 0.7% from 2010 and then down from 2011 by 0.9%). This average bill continues to be lower than that of the state and Non-Pinelands averages. Likewise, as tax bills decline, the valuations that influence the tax bills have also declined in the Pinelands. The Pineland's state equalized valuation decreased by 6.3% in 2012.

Residential taxes in the Pinelands municipalities make up 84.5% of the property taxes paid to municipalities. Commercial constitutes 9.7% of those revenues while vacant land only makes up 3%. In 2012, municipal budgets continued their decline. At \$825 per capita, the Pinelands average municipal budget has dropped by 3.2% from 2011 while state aid per capita has also fallen 1.7% to \$119 per capita.

## **Special Studies**

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

A second special study is currently underway and it seeks to improve the precision and accuracy of the long-term economic monitoring data. Staff is investigating how a geographic information system and alternative data sources can be best used to aid in gathering more precise statistics on those municipalities that are "split" by the Pinelands' border. One solution that begins with this year's report is the purchase of block group level data. While data has improved the ability of the report to assess the economy in the Pinelands, additional study will be done to determine how to improve the report with this data.



## **Conclusion**

Overall, economic and demographic trends in the Pinelands continue to roughly mirror that of the surrounding region. Based on current data, there is no evidence to believe that the Pinelands are in any immediate economic risk when compared with anywhere else in the state. In fact, the Pinelands are actually performing better than other regions in certain categories and in non-recession times. To probe further into the data, the program's special studies have and will provide a greater understanding and analysis of economic trends in the Pinelands, thereby becoming of greater use to the Commission and to local leaders.

# 1. Introduction

## 1.1 The Long-Term Economic Monitoring Program

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

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 in 1981, 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 2012, is the sixteenth in the series and augments most of the data used to develop the previous reports but also includes a variety of information not found in previous reports. A copy of this *Annual Report* can be obtained on CD-ROM by writing to the Pinelands Commission at P.O. Box 359, New Lisbon, New Jersey 08064. The report is also available on the Pinelands Commission web site at <http://www.nj.gov/pinelands>.

## 1.2 Program Goal and Objectives

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

The program was designed to accomplish several principal objectives:

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<sup>2</sup> 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.

<sup>3</sup> 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 have primary responsibility for the day-to-day implementation of the program, including acquisition and analysis of data; coordination with the NPS, expert advisory committee, and public; and development of all reports and other products. Perhaps most importantly, the Commission will consider the results of these monitoring efforts as it identifies the need for in-depth economic studies and continues to refine and improve the Pinelands protection policies. The data will also be used for other Commission analyses and independent efforts.

## **2. Annual Reports**

### **2.1 Data Categories**

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

The *First Annual Report* included a provision for adding supplemental data, and this provision was used for the first time in the *2003 Annual Report*. This *Annual Report*, which covers data from 2012, does not include new supplemental data. Supplemental variables can provide valuable information and insight into the Pinelands and regional economy. They are not considered core variables because they cannot be updated regularly. For instance, the United States Census data is extremely valuable, but because it is only updated every 10 years, most of it cannot be considered core. If reliable data can be obtained for a sufficient period of time, supplemental variables can become core in the future.

### **2.2 Core Variables**

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

#### **Population**

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

#### **Real Estate**

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

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

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

### **Economy**

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

Seven economic growth variables are tracked annually for this report: (1) Retail sales per capita, (2) Per capita income, (3) Unemployment, (4) Employment, establishments, and wages; (5) Farmland assessed acreage, (6) Census of Agriculture data, and (7) Blueberry and cranberry production.

### **Municipal Finance**

The long-term monitoring of municipal fiscal trends is interesting for several reasons. As discussed in previous studies, the Pinelands 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**

<b>Name</b>	<b>Years Collected<sup>4</sup></b>	<b>Years Added<sup>5</sup></b>	<b>Frequency of Collection</b>	<b>Method of Analysis</b>
Municipal Population	1980, 1990, 2000, 2010		Decennial	Inside/Outside Pinelands
Census Block Population	1990, 2000, 2010		Decennial	Census Block, Inside/Outside Pinelands Area
Age Demographics	1980, 1990, 2000	2012	Decennial/Annual	Inside/Outside Pinelands, Census Block Group
Population Estimates	2001-2011	2012	Annual	Inside/Outside Pinelands
Building Permits	1980-2011	2012	Annual	Inside/Outside Pinelands
Average Selling Prices of Homes	1994-2011	2012	Annual	Inside/Outside Pinelands
Volume of Real Estate Transactions	1994-2011	2012	Annual	Inside/Outside Pinelands
Retail Sales & Establishments	1992, 1997, 2002, 2007		Quintennial	County, Place
Income	1979, 1989, 1999, 2010	2012	Decennial/Annual	Inside/Outside Pinelands
Unemployment	1990-2011	2012	Annual	Inside/Outside Pinelands
Employment	2004-2011	2012	Annual	Inside/Outside Pinelands Census Block Group
Number of Establishments	2004-2011	2012	Annual	Inside/Outside Pinelands)
Payroll by Major Industry Sector (Wages)	2004-2011	2012	Annual	Inside/Outside Pinelands
Farmland Assessed Acreage	2009-2011	2012	Annual	Inside/Outside Pinelands
Agricultural Census Data	1992, 1997, 2002, 2007		Quintennial	County
Berry Production	1980-2011	2012	Annual	State
Average Residential Property Tax Bill	1998-2011	2012	Annual	Inside/Outside Pinelands
Equalized Property Value	1998-2011	2012	Annual	Inside/Outside Pinelands
Effective Tax Rate	2000-2011	2012	Annual	Inside/Outside Pinelands
Assessment Class Proportions in Tax Revenue	1999-2011	2012	Annual	Inside/Outside Pinelands
Local Municipal Purpose Revenues	1999-2011	2012	Annual	Inside/Outside Pinelands

<sup>4</sup>Data acquisition is based on the availability of data. An effort is made to acquire data for every year available from 1980 to the present.

<sup>5</sup> Refers to addition from previous report and specifies which years of data are new in this update.

## 2.3 Supplemental Variables

No new supplemental variables have been added to this year's report. 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.

## 2.4 Geographic Scale: Defining the Pinelands

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

The state-designated Pinelands Area encompasses portions of seven counties in southern New Jersey: Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, and Ocean. There are 53 municipalities that have part or all of their land in the Pinelands Area. Most of the variables monitored in the report are obtained at the municipal level, because this is typically the smallest geographic scale available. Municipal values are aggregated into the Pinelands and the Non-Pinelands regions, based on a "10% rule." Any municipality with at least 10% of its land in the Pinelands Area is considered to be in the Pinelands region and is referred to as a Pinelands municipality; all remaining municipalities in southern New Jersey (those located in the seven counties mentioned above, plus Salem County) are considered to be in the Non-Pinelands region. Of the 53 municipalities completely or partially located in the Pinelands Area, 47 were classified as inside, while six<sup>6</sup> were classified as outside, joining the remaining 149 municipalities located entirely outside the Pinelands. In summary, the "Pinelands," as used in this report, refers to 47 municipalities that have at least 10% of their land in the state-designated Pinelands Area, while the "Non-Pinelands" refers to the remaining 155 municipalities of southern New Jersey.

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

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 503,000 people lived outside the boundary, but within Pinelands municipalities. For Pinelands municipalities, population growth between 1990 and 2000 was 5.4% inside the boundary, and 14.9% 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 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. For variables where sub-municipal census data is available, the terms "Pinelands Municipal Area Inside the Boundary," and "Pinelands Municipal Area Outside the Boundary," are used to refer to the areas of Pinelands municipalities that are split by the state-designated Pinelands Area boundary.

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

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

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

## 2.5 Presentation of Data

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

The Pinelands and the Non-Pinelands aggregates are charted, along with southern New Jersey and 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.<sup>7</sup> 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 six<sup>8</sup> 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.

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 2012 dollars, unless otherwise noted. Variables in the Fact Book are not inflation adjusted, as the purpose is to display the most recent information available and not to monitor change over time.

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

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



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

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

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

### 3. Special Studies

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

#### **Continuing Study: Split Town Study**

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

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

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

For the 2013 iteration of the report, the Commission purchased the Business Analyst extension for ESRI's ArcGIS Desktop software. This software combines GIS-based analysis and visualization capabilities with an extensive data package. Most often, the software is used by businesses to gain a better understanding about their markets and their customers. The data helps to provide better information on the economic activities occurring in the Pinelands Area and not just in Pinelands municipalities. The data package provided some block-group and municipal-variable updates to this year's report. With a better understanding of the software and data, it is hoped that the report can be improved in the future.

## **Continuing Study: Indicators of Municipal Health (Update underway)**

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 is being administered by Pinelands Commission staff and conducted in consultation with the Pinelands Municipal Council.

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

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

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

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

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

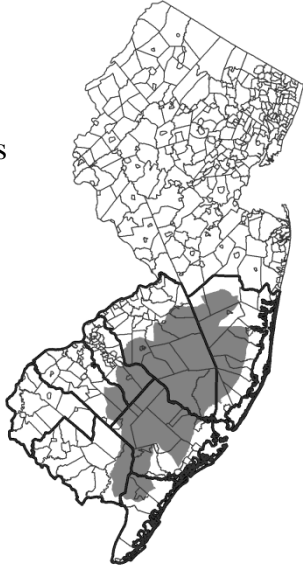
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<sup>9</sup> All municipalities with at least 50% of their land within the Pinelands were included (33 municipalities) plus three additional municipalities which requested to be included.

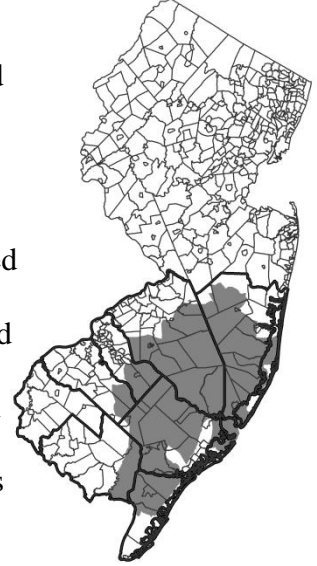
## 4. LTEM Annual Report of Indicators

### Geographic Definitions

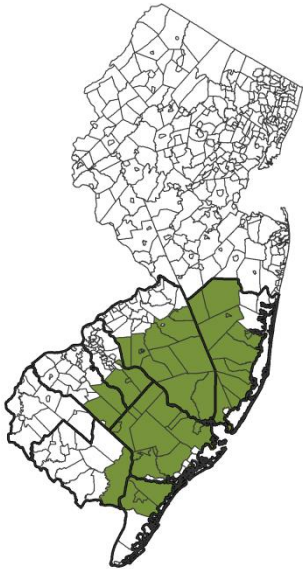
**State-Designated Pinelands Area:** the area designated by The Pinelands Protection Act. This is the state-designated area under the jurisdiction of the Pinelands Commission.



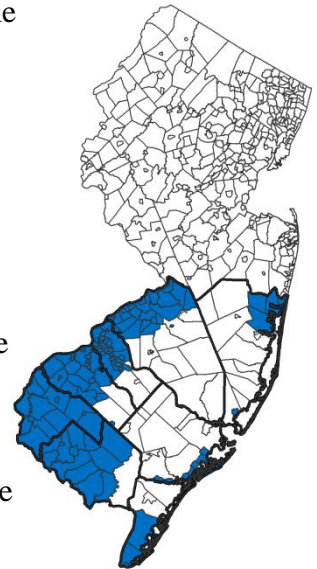
**Pinelands National Reserve:** the area designated by The National Parks and Recreation Act of 1978. This is the federally designated area that includes the state-designated area plus areas under CAFRA and DEP jurisdiction. This report focuses on the state-designated area only.



**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 (364 municipalities) New Jersey (566 municipalities, total).

# P1

## Municipal Population

U.S. Census Bureau 1980, 1990, 2000, 2010

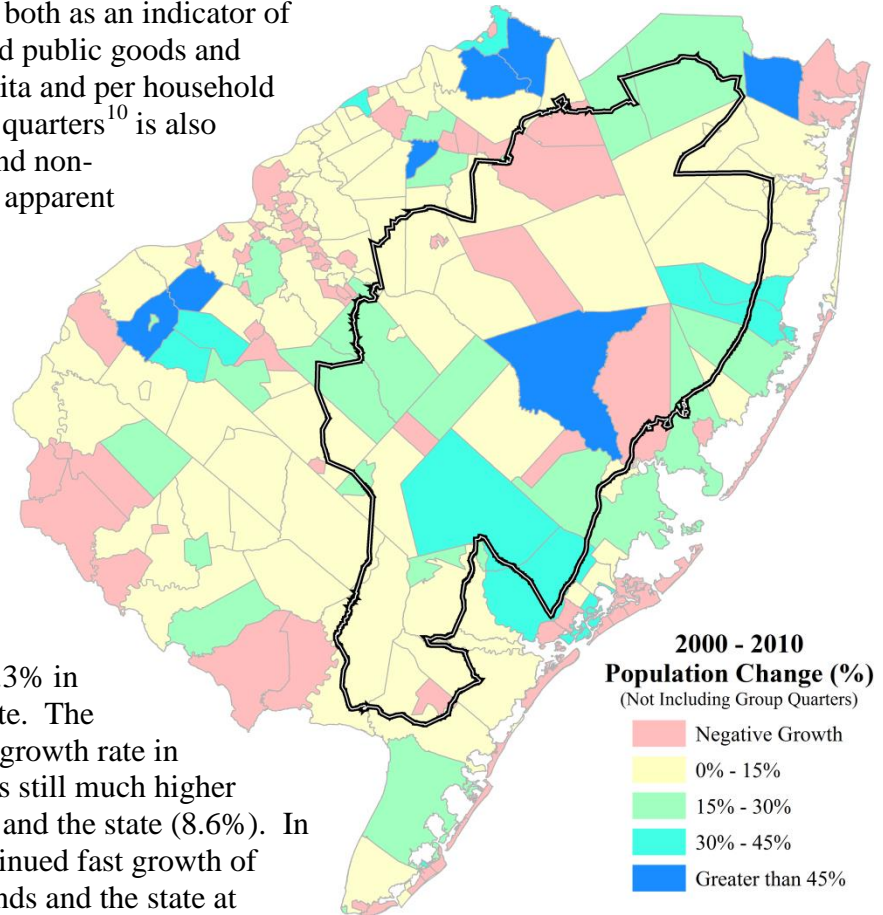
The Pinelands population has grown more quickly than both the Non-Pinelands and the state in every decade since 1980. As of the 2010 U.S. Census, the Pinelands has a population of 698,092.

**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 quarters<sup>10</sup> 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 aggregated to allow for inside/outside the Pinelands and state analysis.

**Findings:** Population in the Pinelands grew quickly in the 1980's, jumping almost 30% over the decade. Elsewhere, population grew only by 7.3% in the Non-Pinelands and 5.2% in the state. The following decade showed a decreased growth rate in the Pinelands at 12.1%, however it was still much higher than that of the Non-Pinelands (7.4%) and the state (8.6%). In the 2000's, the Pinelands showed continued fast growth of 13.3% relative to both the Non-Pinelands and the state at around 4.5%. According to the U.S. Census, the 2010 Pinelands municipal aggregate population was 698,092 while the Non-Pinelands had a population of 1,723,949 and the state's population was 8,791,894. Over the 30-year period, the Pinelands grew by 64.9% despite the added development restraints of the Comprehensive Management Plan. Comparatively, the Non-Pinelands grew by 20.5% and the state grew by 19.4% during the same period.

At the municipal level, Woodland Township grew by 52.8% from 2000 to 2010 (618 additional people). Egg Harbor Township saw the next highest percent growth, increasing by 41.0% 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 13.9%. Nineteen of the municipalities that grew saw increases of less than 10% while only two of those



<sup>10</sup> 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.

grew by less than 1%. All six of the Pinelands municipalities with less than 10% of their land area in the Pinelands also saw growth, with Berlin Borough posting the highest growth at 23.4%.

**Population Change from 1980 to 2010**

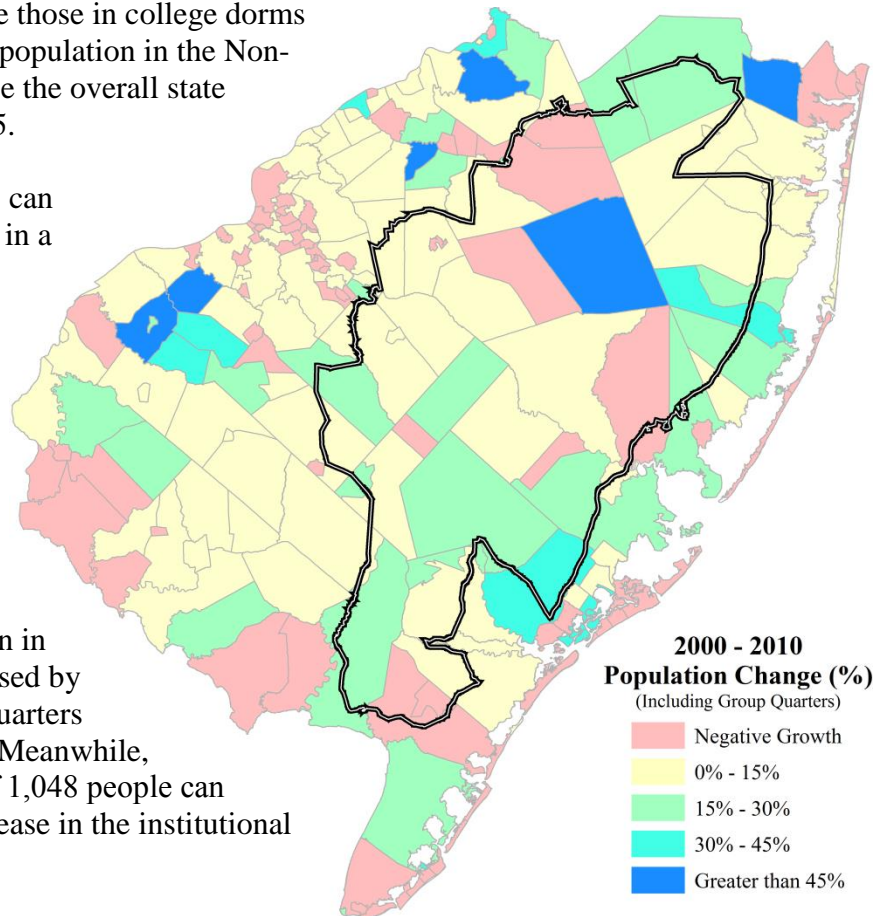
Region	1980	1990	2000	2010	Change 1980 - 1990	Change 1990 - 2000	Change 2000 - 2010	Change 1980 - 2010
Pinelands	423,465	549,521	615,984	698,092	29.8%	12.1%	13.3%	64.9%
Non-Pinelands	1,430,609	1,534,417	1,647,532	1,723,949	7.3%	7.4%	4.6%	20.5%
State	7,365,011	7,747,750	8,414,350	8,791,894	5.2%	8.6%	4.5%	19.4%

Nine municipalities had negative growth from 2000 to 2010, with New Hanover experiencing the greatest loss at 24.2%. The next highest loss occurred in Woodbine Borough, where population declined by 9.0%. Dennis Township and Medford Lakes Borough were the only two municipalities to have losses of less than 1%. The average population loss was 6.2%.

In terms of group quarters, New Hanover Township’s 2010 group quarters population is 77.0% of its total population; likely due to the presence of Joint Base McGuire-Dix-Lakehurst. Maurice River Township has the second highest group quarters population at 55.2% of its total population; most of that population comes 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 group quarters growth 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 has decreased by 7,407 while the overall state group quarters population fell by 7,945.

Changes in group quarters populations can distort the apparent population change in a municipality. For example, Woodland Township, which posted 52.8% total population growth in 2010 (618 people), experienced an increase of 474 people in group quarters; that is 76.7% of the municipality’s 2010 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 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 <sup>11</sup>	Burlington	2,285	2,063	1,170	1,788	618	52.8%	-21.8%
Egg Harbor Township	Atlantic	19,381	24,544	30,726	43,323	12,597	41.0%	123.5%
Barnegat Township	Ocean	8,702	12,235	15,270	20,936	5,666	37.1%	140.6%
Hamilton Township	Atlantic	9,499	16,012	20,499	26,503	6,004	29.3%	179.0%
Ocean Township	Ocean	3,731	5,416	6,450	8,332	1,882	29.2%	123.3%
Jackson Township	Ocean	25,644	33,233	42,816	54,856	12,040	28.1%	113.9%
Little Egg Harbor Township	Ocean	8,483	13,333	15,945	20,065	4,120	25.8%	136.5%
Monroe Township	Gloucester	21,639	26,703	28,967	36,129	7,162	24.7%	67.0%
Weymouth Township	Atlantic	1,260	1,957	2,257	2,715	458	20.3%	115.5%
Galloway Township	Atlantic	12,176	23,330	31,209	37,349	6,140	19.7%	206.7%
Buena Borough	Atlantic	3,642	4,441	3,873	4,603	730	18.8%	26.4%
Stafford Township	Ocean	10,385	13,325	22,532	26,535	4,003	17.8%	155.5%
Hammonton Town	Atlantic	12,298	12,208	12,604	14,791	2,187	17.4%	20.3%
Plumsted Township	Ocean	4,674	6,005	7,275	8,421	1,146	15.8%	80.2%
Maurice River Township <sup>11</sup>	Cumberland	4,577	6,648	6,928	7,976	1,048	15.1%	74.3%
Winslow Township	Camden	20,034	30,087	34,611	39,499	4,888	14.1%	97.2%
Eagleswood Township	Ocean	1,009	1,476	1,441	1,603	162	11.2%	58.9%
Manchester Township	Ocean	27,987	35,976	38,928	43,070	4,142	10.6%	53.9%
Washington Township	Burlington	808	805	621	687	66	10.6%	-15.0%
Estell Manor City	Atlantic	848	1,404	1,585	1,735	150	9.5%	104.6%
Lacey Township	Ocean	14,161	22,141	25,346	27,644	2,298	9.1%	95.2%
Franklin Township	Gloucester	12,396	14,482	15,466	16,820	1,354	8.8%	35.7%
Evesham Township	Burlington	21,508	35,309	42,275	45,538	3,263	7.7%	111.7%
Port Republic City	Atlantic	837	992	1,037	1,115	78	7.5%	33.2%
Chesilhurst Borough	Camden	1,590	1,526	1,520	1,634	114	7.5%	2.8%
Wrightstown Borough	Burlington	3,031	3,843	748	802	54	7.2%	-73.5%
Beachwood Borough	Ocean	7,687	9,324	10,375	11,045	670	6.5%	43.7%
Lakehurst Borough	Ocean	2,908	3,078	2,522	2,654	132	5.2%	-8.7%
Mullica Township	Atlantic	5,243	5,896	5,912	6,147	235	4.0%	17.2%
Medford Township	Burlington	17,622	20,526	22,253	23,033	780	3.5%	30.7%
Berkeley Township	Ocean	23,151	37,319	39,991	41,255	1,264	3.2%	78.2%
Upper Township	Cape May	6,713	10,681	12,115	12,373	258	2.1%	84.3%
Buena Vista Township	Atlantic	6,959	7,655	7,436	7,570	134	1.8%	8.8%
Waterford Township	Camden	8,126	10,940	10,494	10,649	155	1.5%	31.0%
South Toms River Borough	Ocean	3,954	3,869	3,634	3,684	50	1.4%	-6.8%
Berlin Township	Camden	5,348	5,466	5,290	5,357	67	1.3%	0.2%
Southampton Township	Burlington	8,808	10,202	10,388	10,464	76	0.7%	18.8%
Shamong Township	Burlington	4,537	5,765	6,462	6,490	28	0.4%	43.0%
Dennis Township	Cape May	3,989	5,574	6,492	6,467	-25	-0.4%	62.1%
Medford Lakes Borough	Burlington	4,958	4,462	4,173	4,146	-27	-0.6%	-16.4%
Pemberton Township	Burlington	29,720	31,342	28,691	27,912	-779	-2.7%	-6.1%
Tabernacle Township	Burlington	6,236	7,360	7,170	6,949	-221	-3.1%	11.4%
Folsom Borough	Atlantic	1,892	2,181	1,972	1,885	-87	-4.4%	-0.4%
Bass River Township	Burlington	1,344	1,580	1,510	1,443	-67	-4.4%	7.4%
Egg Harbor City	Atlantic	4,618	4,583	4,545	4,243	-302	-6.6%	-8.1%
Woodbine Borough <sup>11</sup>	Cape May	2,809	2,678	2,716	2,472	-244	-9.0%	-12.0%
New Hanover Township <sup>11</sup>	Burlington	14,258	9,546	9,744	7,385	-2,359	-24.2%	-48.2%
<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	23.4%	31.1%
Vineland City	Cumberland	53,753	54,780	56,271	60,724	4,453	7.9%	13.0%
Springfield Township	Burlington	2,691	3,028	3,227	3,414	187	5.8%	26.9%
Corbin City	Atlantic	254	412	468	492	24	5.1%	93.7%
North Hanover Township	Burlington	9,050	9,994	7,347	7,678	331	4.5%	-15.2%
Toms River Township	Ocean	64,455	76,371	89,706	91,239	1,533	1.7%	41.6%

<sup>11</sup> Due to a significant amount of the population living in group quarters, changes are more accurately reflected in the tables on the following two pages.



Table P1b

## 2010 Census Group Quarters Population

Municipality	County	Group Quarters Pop	% of Pop in Group Quarters	Institution Pop	% of GQ Pop in Institutions	Non-Institution Pop	% of GQ Pop in Non-Institutions
New Hanover Township	Burlington	5,685	77.0%	5,325	72.1%	360	4.9%
Maurice River Township	Cumberland	4,405	55.2%	4,405	55.2%	0	0.0%
Woodland Township	Burlington	474	26.5%	54	3.0%	420	23.5%
Woodbine Borough	Cape May	496	20.1%	9	0.4%	487	19.7%
Galloway Township	Atlantic	2,818	7.5%	401	1.1%	2,417	6.5%
Chesilhurst Borough	Camden	108	6.6%	49	3.0%	59	3.6%
Hamilton Township	Atlantic	1,120	4.2%	982	3.7%	138	0.5%
Winslow Township	Camden	962	2.4%	839	2.1%	123	0.3%
Hammonton Town	Atlantic	306	2.1%	167	1.1%	139	0.9%
Washington Township	Burlington	14	2.0%	14	2.0%	0	0.0%
Dennis Township	Cape May	120	1.9%	103	1.6%	17	0.3%
Manchester Township	Ocean	775	1.8%	674	1.6%	101	0.2%
Pemberton Township	Burlington	485	1.7%	417	1.5%	68	0.2%
Waterford Township	Camden	170	1.6%	4	0.0%	166	1.6%
Mullica Township	Atlantic	87	1.4%	0	0.0%	87	1.4%
Berkeley Township	Ocean	582	1.4%	568	1.4%	14	0.0%
Little Egg Harbor Township	Ocean	269	1.3%	269	1.3%	0	0.0%
Medford Township	Burlington	220	1.0%	177	0.8%	43	0.2%
Evesham Township	Burlington	376	0.8%	136	0.3%	240	0.5%
Jackson Township	Ocean	432	0.8%	420	0.8%	12	0.0%
Egg Harbor City	Atlantic	33	0.8%	20	0.5%	13	0.3%
Stafford Township	Ocean	180	0.7%	176	0.7%	4	0.0%
Port Republic City	Atlantic	7	0.6%	0	0.0%	7	0.6%
Barneget Township	Ocean	118	0.6%	109	0.5%	9	0.0%
Monroe Township	Gloucester	195	0.5%	151	0.4%	44	0.1%
Estell Manor City	Atlantic	8	0.5%	8	0.5%	0	0.0%
Buena Borough	Atlantic	19	0.4%	0	0.0%	19	0.4%
Franklin Township	Gloucester	51	0.3%	0	0.0%	51	0.3%
Folsom Borough	Atlantic	5	0.3%	0	0.0%	5	0.3%
Weymouth Township	Atlantic	7	0.3%	0	0.0%	7	0.3%
Buena Vista Township	Atlantic	18	0.2%	0	0.0%	18	0.2%
Berlin Township	Camden	12	0.2%	0	0.0%	12	0.2%
Shamong Township	Burlington	14	0.2%	13	0.2%	1	0.0%
Lacey Township	Ocean	50	0.2%	26	0.1%	24	0.1%
Beachwood Borough	Ocean	14	0.1%	0	0.0%	14	0.1%
Tabernacle Township	Burlington	6	0.1%	0	0.0%	6	0.1%
Upper Township	Cape May	10	0.1%	0	0.0%	10	0.1%
Plumsted Township	Ocean	6	0.1%	0	0.0%	6	0.1%
Ocean Township	Ocean	4	0.0%	0	0.0%	4	0.0%
Egg Harbor Township	Atlantic	19	0.0%	0	0.0%	19	0.0%
Bass River Township	Burlington		0.0%		0.0%		0.0%
Medford Lakes Borough	Burlington		0.0%		0.0%		0.0%
Southampton Township	Burlington		0.0%		0.0%		0.0%
Wrightstown Borough	Burlington		0.0%		0.0%		0.0%
Eagleswood Township	Ocean		0.0%		0.0%		0.0%
Lakehurst Borough	Ocean		0.0%		0.0%		0.0%
South Toms River Borough	Ocean		0.0%		0.0%		0.0%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Vineland City	Cumberland	1,491	2.5%	897	1.5%	594	1.0%
Berlin Borough	Camden	139	1.8%	126	1.7%	13	0.2%
Toms River Township	Ocean	1,439	1.6%	1,343	1.5%	96	0.1%
Springfield Township	Burlington	6	0.2%	0	0.0%	6	0.2%
Corbin City	Atlantic		0.0%		0.0%		0.0%
North Hanover Township	Burlington		0.0%		0.0%		0.0%

**Table P1c 2000 to 2010 Group Quarters Components of Population Change**

Full Name	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	0	0	0
Galloway Township	Atlantic	2,102	2,818	716	32	401	369	2,070	2,417	347
Woodland Township	Burlington	0	474	474	0	54	54	0	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	0	0	0
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	0	0	0	48	87	39
Shamong Township	Burlington	2	14	12	0	13	13	2	1	-1
Lacey Township	Ocean	38	50	12	24	26	2	14	24	10
Beachwood Borough	Ocean	6	14	8	0	0	0	6	14	8
Upper Township	Cape May	8	10	2	0	0	0	8	10	2
Port Republic City	Atlantic	6	7	1	0	0	0	6	7	1
Weymouth Township	Atlantic	6	7	1	0	0	0	6	7	1
Bass River Township	Burlington	0		0	0		0	0		0
Medford Lakes Borough	Burlington	0		0	0		0	0		0
Eagleswood Township	Ocean	0		0	0		0	0		0
Lakehurst Borough	Ocean	0		0	0		0	0		0
South Toms River Borough	Ocean	0		0	0		0	0		0
Folsom Borough	Atlantic	7	5	-2	0	0	0	7	5	-2
Plumsted Township	Ocean	8	6	-2	0	0	0	8	6	-2
Berkeley Township	Ocean	588	582	-6	219	568	349	369	14	-355
Berlin Township	Camden	19	12	-7	0	0	0	19	12	-7
Barneget Township	Ocean	127	118	-9	123	109	-14	4	9	5
Wrightstown Borough	Burlington	10		-10	0		0	10		-10
Buena Borough	Atlantic	33	19	-14	0	0	0	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	0	0	0
Pemberton Township	Burlington	509	485	-24	433	417	-16	76	68	-8
Egg Harbor Township	Atlantic	47	19	-28	0	0	0	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	0	4	4	209	166	-43
Franklin Township	Gloucester	90	51	-39	0	0	0	90	51	-39
Hammonton Town	Atlantic	347	306	-41	225	167	-58	122	139	17
Ocean Township	Ocean	54	4	-50	0	0	0	54	4	-50
Southampton Township	Burlington	58		-58	58		-58	0		0
Tabernacle Township	Burlington	72	6	-66	67	0	-67	5	6	1
Woodbine Borough	Cape May	571	496	-75	570	9	-561	1	487	486
Buena Vista Township	Atlantic	94	18	-76	0	0	0	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	0	-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
North Hanover Township	Burlington	0		0	0		0	0		0
Corbin City	Atlantic	0		0	0		0	0		0
Springfield Township	Burlington	7	6	-1	0	0	0	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

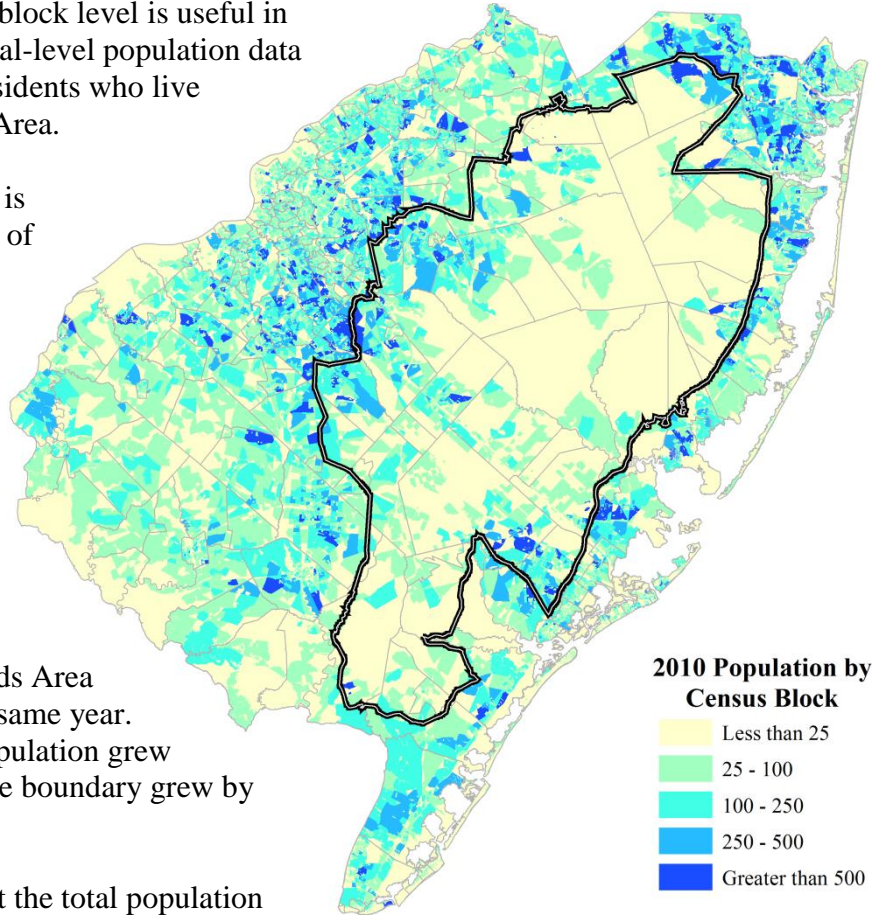
U.S. Census Bureau 1990, 2000, 2010

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 27.3%, while the areas inside only grew by 19.2%.

**Description:** Population at the census block level is useful in overcoming the limitations of municipal-level population data by identifying the actual number of residents who live within the state-designated Pinelands Area.

**Unit of Analysis:** Sub-municipal data is 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.

**Findings:** In 1990, 262,507 people lived in the Pinelands Area. The municipal areas outside of the Pinelands Area had a total population of 437,380 that same year. Ten years later, the Pinelands Area population grew by only 5.4% while the area outside the boundary grew by 14.9%.



The 2010 census block data shows that the total population of the 53 municipalities with any amount of land in the Pinelands reached 869,615. Of that total amount, 64.0% were living outside the Pinelands boundary. Population data analyzed at the census block level revealed that 312,971 people lived in the state-designed Pinelands Area in 2010; a 13.1% increase over the 2000 population of 276,751. The number of persons living in Pinelands municipalities outside of the Pinelands Area boundary increased from 502,662 in 2000 to 556,644 in 2010; an increase of 10.7%. 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 (27.3%), while the areas inside only grew by 19.2%.

**Pinelands Municipal Census Block Population**

In/Out	1990	2000	2010	Change 1990 - 2000	Change 2000 - 2010	Change 1990 - 2010
In Boundary	262,507	276,751	312,971	5.4%	13.1%	19.2%
Out Boundary	437,380	502,662	556,644	14.9%	10.7%	27.3%

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 61.4% of the Pinelands total population, while the 20 most populated municipalities account for 85.5% 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 (122.8%). Wrightstown Borough, New Hanover Township, 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	35.8%
Gained Inside, Lost Outside	4	7.5%
Gained Inside, No Area Outside	7	13.2%
No Change Inside, Gained Outside	5	9.4%
Lost Inside, Gained Outside	12	22.6%
Lost Inside, Lost Outside	2	3.8%
Lost Inside, No Area Outside.	4	7.5%

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 35.8% 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 (22.6% or 12 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	15,769	63.6%
Pemberton Township	Burlington	90%	27,394	515	98.2%
Hamilton Township	Atlantic	97%	24,954	1,549	94.2%
Medford Township	Burlington	75%	18,911	4,172	81.9%
Monroe Township	Gloucester	69%	17,871	18,258	49.5%
Winslow Township	Camden	81%	17,813	21,686	45.1%
Stafford Township	Ocean	39%	15,678	10,857	59.1%
Galloway Township	Atlantic	38%	14,945	22,404	40.0%
Hammonton Town	Atlantic	100%	14,791	0	100.0%
Manchester Township	Ocean	72%	12,286	30,784	28.5%
Evesham Township	Burlington	55%	11,855	33,678	26.0%
Waterford Township	Camden	100%	10,649	0	100.0%
Southampton Township	Burlington	73%	7,295	3,169	69.7%
Barneget Township	Ocean	56%	7,187	13,751	34.3%
Tabernacle Township	Burlington	100%	6,949	0	100.0%
New Hanover Township	Burlington	91%	6,692	693	90.6%
Shamong Township	Burlington	100%	6,490	0	100.0%
Buena Vista Township	Atlantic	90%	6,316	1,254	83.4%
Mullica Township	Atlantic	100%	6,041	0	100.0%
Maurice River Township	Cumberland	69%	5,897	2,075	74.0%
Jackson Township	Ocean	47%	4,832	50,024	8.8%
Egg Harbor City	Atlantic	100%	4,243	0	100.0%
Medford Lakes Borough	Burlington	100%	4,096	0	100.0%
Franklin Township	Gloucester	36%	2,616	14,204	15.6%
South Toms River Borough	Ocean	48%	2,586	1,098	70.2%
Lakehurst Borough	Ocean	87%	2,535	119	95.5%
Woodbine Borough	Cape May	95%	2,465	7	99.7%
Berkeley Township	Ocean	30%	2,112	39,186	5.1%
Weymouth Township	Atlantic	82%	2,086	629	76.8%
Folsom Borough	Atlantic	100%	1,885	0	100.0%
Woodland Township	Burlington	100%	1,788	0	100.0%
Chesilhurst Borough	Camden	100%	1,634	0	100.0%
Estell Manor City	Atlantic	72%	1,629	109	93.7%
Dennis Township	Cape May	38%	1,570	4,897	24.3%
Upper Township	Cape May	33%	1,306	11,067	10.6%
Bass River Township	Burlington	87%	1,172	271	81.2%
Buena Borough	Atlantic	47%	1,030	3,573	22.4%
Washington Township	Burlington	100%	793	0	100.0%
Lacey Township	Ocean	67%	550	27,094	2.0%
Plumsted Township	Ocean	53%	451	7,970	5.4%
Berlin Township	Camden	16%	303	5,054	5.7%
Little Egg Harbor Township	Ocean	23%	203	19,835	1.0%
Ocean Township	Ocean	41%	140	8,190	1.7%
Port Republic City	Atlantic	35%	88	1,027	7.9%
Wrightstown Borough	Burlington	73%	81	721	10.1%
Beachwood Borough	Ocean	28%	2	11,013	0.0%
Eagleswood Township	Ocean	20%	0	1,662	0.0%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>					
North Hanover Township	Burlington	4%	2,973	4,705	38.7%
Vineland City	Cumberland	7%	156	60,568	0.3%
Berlin Borough	Camden	10%	76	7,512	1.0%
Corbin City	Atlantic	1%	0	487	0.0%
Springfield Township	Burlington	2%	0	3,769	0.0%
Toms River Township	Ocean	0.04%	0	91,239	0.0%

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
Barnegat Township	Ocean	56%	3,226	7,187	3,961	122.8%
Egg Harbor Township	Atlantic	38%	16,209	27,556	11,347	70.0%
Little Egg Harbor Township	Ocean	23%	127	203	76	59.8%
Woodland Township	Burlington	100%	1,170	1,788	618	52.8%
Galloway Township	Atlantic	38%	10,658	14,945	4,287	40.2%
Hamilton Township	Atlantic	97%	19,136	24,954	5,818	30.4%
Monroe Township	Gloucester	69%	14,406	17,871	3,465	24.1%
Maurice River Township	Cumberland	69%	4,819	5,897	1,078	22.4%
Weymouth Township	Atlantic	82%	1,723	2,086	363	21.1%
Buena Borough	Atlantic	47%	865	1,030	165	19.1%
Jackson Township	Ocean	47%	4,106	4,832	726	17.7%
Hammonton Town	Atlantic	100%	12,604	14,791	2,187	17.4%
Stafford Township	Ocean	39%	13,390	15,678	2,288	17.1%
Winslow Township	Camden	81%	15,599	17,813	2,214	14.2%
Washington Township	Burlington	100%	704	793	89	12.6%
Estell Manor City	Atlantic	72%	1,454	1,629	175	12.0%
Upper Township	Cape May	33%	1,175	1,306	131	11.1%
Plumsted Township	Ocean	53%	412	451	39	9.5%
Chesilhurst Borough	Camden	100%	1,520	1,634	114	7.5%
Lakehurst Borough	Ocean	87%	2,393	2,535	142	5.9%
Lacey Township	Ocean	67%	521	550	29	5.6%
Medford Township	Burlington	75%	18,189	18,911	722	4.0%
South Toms River Borough	Ocean	48%	2,495	2,586	91	3.6%
Mullica Township	Atlantic	100%	5,829	6,041	212	3.6%
Evesham Township	Burlington	55%	11,553	11,855	302	2.6%
Berlin Township	Camden	16%	298	303	5	1.7%
Waterford Township	Camden	100%	10,494	10,649	155	1.5%
Southampton Township	Burlington	73%	7,193	7,295	102	1.4%
Buena Vista Township	Atlantic	90%	6,248	6,316	68	1.1%
Shamong Township	Burlington	100%	6,462	6,490	28	0.4%
Eagleswood Township	Ocean	20%	0	0	0	0.0%
Manchester Township	Ocean	72%	12,320	12,286	-34	-0.3%
Franklin Township	Gloucester	36%	2,664	2,616	-48	-1.8%
Medford Lakes Borough	Burlington	100%	4,186	4,096	-90	-2.2%
Pemberton Township	Burlington	90%	28,127	27,394	-733	-2.6%
Tabernacle Township	Burlington	100%	7,170	6,949	-221	-3.1%
Dennis Township	Cape May	38%	1,626	1,570	-56	-3.4%
Ocean Township	Ocean	41%	145	140	-5	-3.4%
Folsom Borough	Atlantic	100%	1,972	1,885	-87	-4.4%
Bass River Township	Burlington	87%	1,234	1,172	-62	-5.0%
Egg Harbor City	Atlantic	100%	4,545	4,243	-302	-6.6%
Woodbine Borough	Cape May	95%	2,710	2,465	-245	-9.0%
Berkeley Township	Ocean	30%	2,391	2,112	-279	-11.7%
Port Republic City	Atlantic	35%	102	88	-14	-13.7%
Wrightstown Borough	Burlington	73%	98	81	-17	-17.3%
New Hanover Township	Burlington	91%	9,109	6,692	-2,417	-26.5%
Beachwood Borough	Ocean	28%	4	2	-2	-50.0%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Corbin City	Atlantic	1%	0	0	0	0.0%
Springfield Township	Burlington	2%	0	0	0	0.0%
Toms River Township	Ocean	0%	0	0	0	0.0%
Berlin Borough	Camden	10%	76	76	0	0.0%
North Hanover Township	Burlington	4%	3,108	2,973	-135	-4.3%
Vineland City	Cumberland	7.00%	186	156	-30	-16.1%

**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	109	37	51.4%
Ocean Township	Ocean	41%	6,305	8,190	1,885	29.9%
Jackson Township	Ocean	47%	38,710	50,024	11,314	29.2%
Little Egg Harbor Township	Ocean	23%	15,762	19,835	4,073	25.8%
Monroe Township	Gloucester	69%	14,561	18,258	3,697	25.4%
Buena Borough	Atlantic	47%	3,008	3,573	565	18.8%
Stafford Township	Ocean	39%	9,142	10,857	1,715	18.8%
Woodbine Borough	Cape May	95%	6	7	1	16.7%
Plumsted Township	Ocean	53%	6,863	7,970	1,107	16.1%
Manchester Township	Ocean	72%	26,608	30,784	4,176	15.7%
Barnegat Township	Ocean	56%	12,044	13,751	1,707	14.2%
Winslow Township	Camden	81%	19,012	21,686	2,674	14.1%
Hamilton Township	Atlantic	97%	1,363	1,549	186	13.6%
Eagleswood Township	Ocean	20%	1,496	1,662	166	11.1%
Franklin Township	Gloucester	36%	12,802	14,204	1,402	11.0%
Wrightstown Borough	Burlington	73%	650	721	71	10.9%
Port Republic City	Atlantic	35%	935	1,027	92	9.8%
Evesham Township	Burlington	55%	30,722	33,678	2,956	9.6%
Lacey Township	Ocean	67%	24,825	27,094	2,269	9.1%
New Hanover Township	Burlington	91%	635	693	58	9.1%
Galloway Township	Atlantic	38%	20,551	22,404	1,853	9.0%
Egg Harbor Township	Atlantic	38%	14,517	15,769	1,252	8.6%
Beachwood Borough	Ocean	28%	10,348	11,013	665	6.4%
Buena Vista Township	Atlantic	90%	1,188	1,254	66	5.6%
Weymouth Township	Atlantic	82%	600	629	29	4.8%
Berkeley Township	Ocean	30%	37,635	39,186	1,551	4.1%
Medford Township	Burlington	75%	4,051	4,172	121	3.0%
Berlin Township	Camden	16%	4,992	5,054	62	1.2%
Upper Township	Cape May	33%	10,940	11,067	127	1.2%
Dennis Township	Cape May	38%	4,866	4,897	31	0.6%
Woodland Township	Burlington	100%	0	0	0	0.0%
Hammonton Town	Atlantic	100%	0	0	0	0.0%
Washington Township	Burlington	100%	0	0	0	0.0%
Chesilhurst Borough	Camden	100%	0	0	0	0.0%
Mullica Township	Atlantic	100%	0	0	0	0.0%
Waterford Township	Camden	100%	0	0	0	0.0%
Shamong Township	Burlington	100%	0	0	0	0.0%
Medford Lakes Borough	Burlington	100%	0	0	0	0.0%
Tabernacle Township	Burlington	100%	0	0	0	0.0%
Folsom Borough	Atlantic	100%	0	0	0	0.0%
Egg Harbor City	Atlantic	100%	0	0	0	0.0%
Southampton Township	Burlington	73%	3,177	3,169	-8	-0.3%
Maurice River Township	Cumberland	69%	2,094	2,075	-19	-0.9%
Bass River Township	Burlington	87%	276	271	-5	-1.8%
South Toms River Borough	Ocean	48%	1,139	1,098	-41	-3.6%
Lakehurst Borough	Ocean	87%	129	119	-10	-7.8%
Pemberton Township	Burlington	90%	582	515	-67	-11.5%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Berlin Borough	Camden	10%	6,073	7,512	1,439	23.7%
North Hanover Township	Burlington	4%	4,239	4,705	466	11.0%
Vineland City	Cumberland	7%	56,085	60,568	4,483	8.0%
Springfield Township	Burlington	2%	3,513	3,769	256	7.3%
Corbin City	Atlantic	1%	461	487	26	5.6%
Toms River Township	Ocean	0.04%	89,685	91,239	1,554	1.7%

# P3 Age Demographics

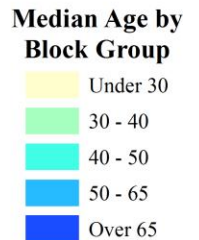
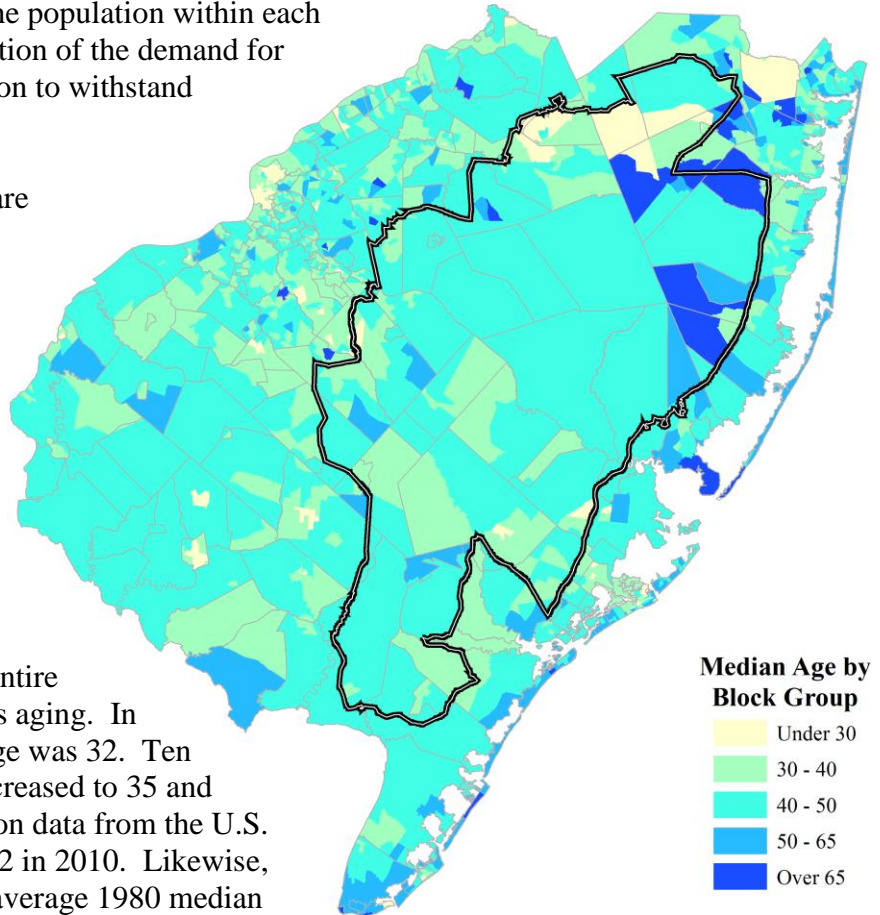
U.S. Census Bureau 1980, 1990, 2000, 2010  
ESRI Data 2012

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

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

**Unit of Analysis:** Demographic data are compiled at the municipal level and aggregated for inside/outside the Pinelands and state analysis. In prior Long-Term Economic Monitoring Reports, analysis was mainly done by percentage under 18 and over 65 years of age. This year's report will look at median ages as well as population pyramids<sup>12</sup> using ESRI block group estimates of 2012 age/sex counts.

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

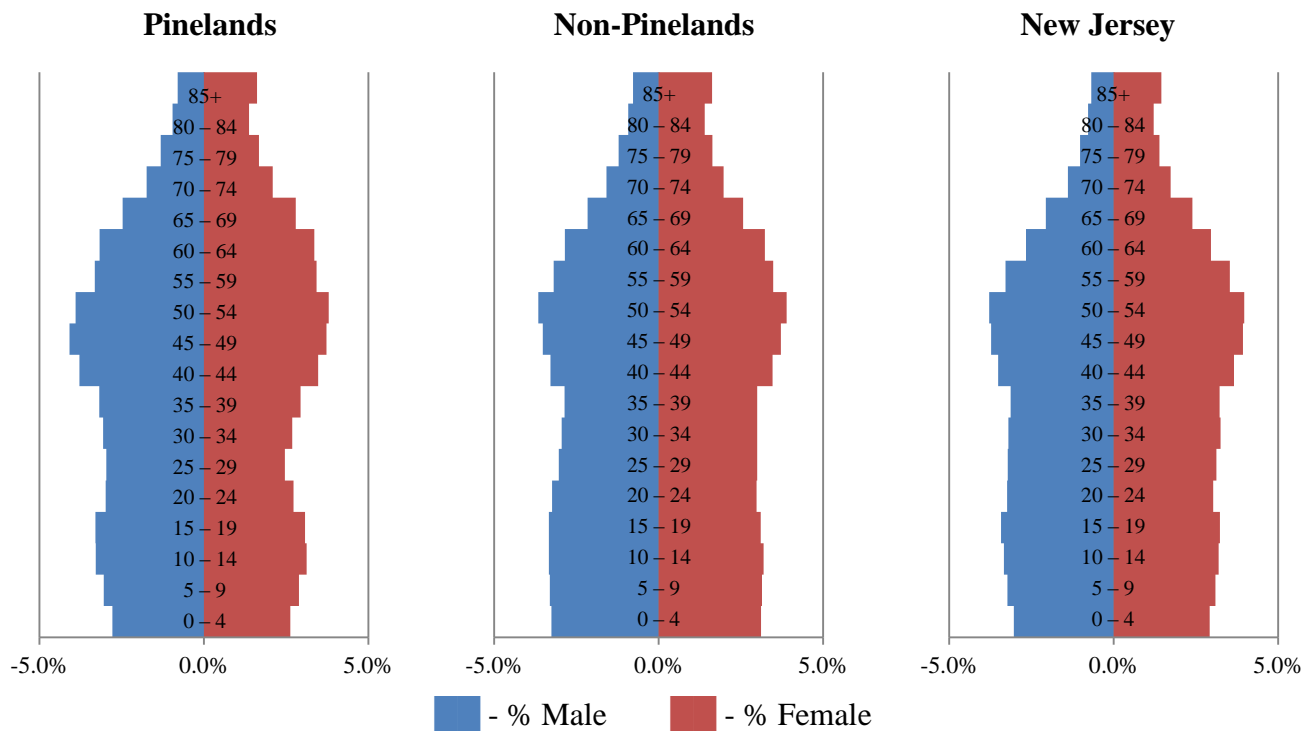


Population pyramids of block group-level data also show an aging population, but not necessarily a declining one. As the baby boomer<sup>13</sup> generation approaches greater numbers in senior citizenship, the median age will continue to increase until that generation no longer makes up such a significant portion of the population. The population pyramids should serve as a warning to governments: the baby boomers are entering into retirement ages and many may soon require greater amounts of targeted government-funded services; and with fewer work-force aged individuals to support those services via taxes, some municipalities may struggle to keep up financially.

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

<sup>13</sup> Baby boomers are those portions of the population born between 1946 and 1964.





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

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

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

Table P3

## Pinelands Municipal Median Age – 1980 to 2010

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

# P4 Population Estimates

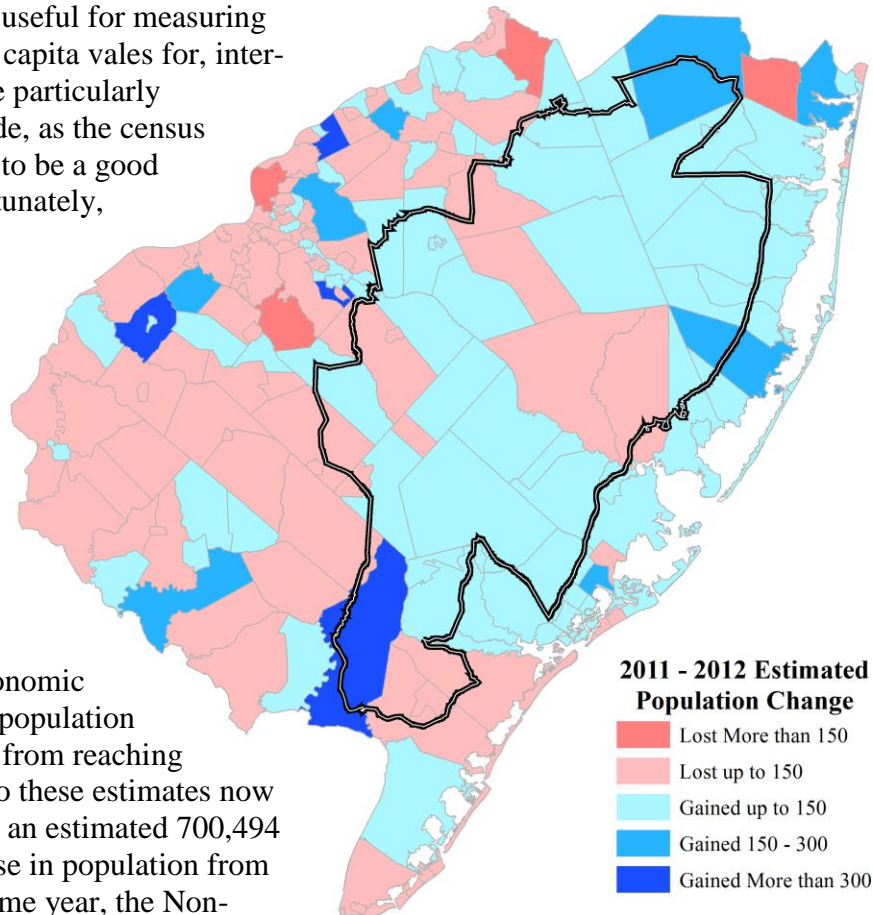
U.S. Census Bureau/N.J. Department of Labor 2008 - 2012

The Pinelands grew from 2011 to 2012, adding an estimated 2,068 people (0.3%). This continues the trend of the Pinelands adding a greater percentage of residents than the Non-Pinelands, which grew by an estimated 0.1% in 2012 (933 people).

**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 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 aggregated to allow for inside/outside the Pinelands and state analysis.

**Findings:** In the 2012 Long-Term Economic Monitoring Report, the reported 2011 population in the Pinelands was 765 people away from reaching 700,000 people. The yearly revision to these estimates now puts the Pinelands' 2011 population at an estimated 700,494 people. This represents a 0.3% increase in population from the 2010 census year to 2011. That same year, the Non-Pinelands grew by 0.2% to 1,726,721 and the state grew by 0.5% to 8,834,773 people.



Estimates from 2012 show that the Pinelands again grew by 0.3% from 2011, adding an estimated 2,068 people. The Non-Pinelands added only 933 people (0.1%) while the state grew by 29,817 people (0.3%). This brings the total Pinelands population to 702,562, the Non-Pinelands to 1,727,654, and the state to 8,864,590.

**Population Estimates**

Region	2008	2009	2010	2011	2012	5-Year Change	5-Year % Change
Pinelands	688,959	693,936	698,092	700,494	702,562	13,603	2.0%
Non-Pinelands	1,719,558	1,721,609	1,723,949	1,726,721	1,727,654	8,096	0.5%
State	8,711,090	8,755,602	8,791,894	8,834,773	8,864,590	153,500	1.8%

Of the 47 Pinelands municipalities with at least 10% land in the Pinelands Area, Maurice River Township grew the greatest at 5.0% in 2012, adding 387 people to bring its estimated population to 8,146. Eagleswood Township and Stafford Township were the only other municipalities to grow by more than

1% (up 1.4% and 1.1%, respectively). Out of 47 municipalities, 34 experienced growth at an average of 0.5%. One municipality (Chesilhurst Borough) neither grew, nor lost population and 12 municipalities posted an average loss of 0.2%. Of those that lost population, Folsom Borough had the highest percentage loss at 0.4%

In absolute terms, nine municipalities saw growth of greater than 100 people, with three of those adding more than 200 (Jackson Township, Stafford Township, and Maurice River Township). Maurice River Township experienced the highest population growth, adding 387 people. On the side of population loss, six municipalities lost less than 10 people. Franklin Township had the greatest absolute loss of 50 people, with the next highest loss occurring in Upper Township, which lost 31 people.

Table P4

## Municipal Population Estimates

Municipality	County	2008	2009	2010	2011	2012	5-Year Change	South N.J. 5-Year Rank Change	5-Year Change (%)
Jackson Township	Ocean	53,163	54,094	54,856	55,355	55,616	2,453	2	4.6%
Egg Harbor Township	Atlantic	41,420	42,528	43,323	43,480	43,628	2,208	3	5.3%
Barneget Township	Ocean	20,097	20,563	20,936	21,296	21,418	1,321	5	6.6%
Monroe Township	Gloucester	35,315	35,784	36,129	36,589	36,597	1,282	6	3.6%
Hamilton Township	Atlantic	25,668	26,165	26,503	26,636	26,728	1,060	8	4.1%
Stafford Township	Ocean	26,040	26,304	26,535	26,648	26,945	905	10	3.5%
Little Egg Harbor Township	Ocean	19,505	19,811	20,065	20,199	20,336	831	12	4.3%
Galloway Township	Atlantic	36,596	37,062	37,349	37,283	37,318	722	13	2.0%
Winslow Township	Camden	38,648	39,118	39,499	39,259	39,238	590	16	1.5%
Evesham Township	Burlington	45,233	45,355	45,538	45,723	45,755	522	18	1.2%
Ocean Township	Ocean	8,062	8,211	8,332	8,451	8,518	456	21	5.7%
Manchester Township	Ocean	42,670	42,868	43,070	43,004	43,043	373	27	0.9%
Lacey Township	Ocean	27,484	27,555	27,644	27,724	27,825	341	28	1.2%
Plumsted Township	Ocean	8,283	8,356	8,421	8,477	8,519	236	35	2.8%
Medford Township	Burlington	23,032	23,006	23,033	23,124	23,227	195	40	0.8%
Berkeley Township	Ocean	41,353	41,267	41,255	41,395	41,498	145	45	0.4%
Maurice River Township	Cumberland	8,023	8,063	7,976	7,759	8,146	123	49	1.5%
Hammonton Town	Atlantic	14,654	14,741	14,791	14,743	14,751	97	53	0.7%
Woodland Township	Burlington	1,708	1,751	1,788	1,801	1,802	94	54	5.5%
Beachwood Borough	Ocean	11,014	11,023	11,045	11,071	11,100	86	56	0.8%
Berlin Township	Camden	5,347	5,355	5,357	5,412	5,421	74	60	1.4%
Eagleswood Township	Ocean	1,583	1,593	1,603	1,627	1,650	67	61	4.2%
Weymouth Township	Atlantic	2,657	2,691	2,715	2,713	2,717	60	62	2.3%
Buena Borough	Atlantic	4,515	4,568	4,603	4,576	4,565	50	66	1.1%
Waterford Township	Camden	10,672	10,657	10,649	10,677	10,711	39	71	0.4%
Mullica Township	Atlantic	6,159	6,156	6,147	6,163	6,190	31	73	0.5%
Chesilhurst Borough	Camden	1,621	1,625	1,634	1,643	1,643	22	77	1.4%
Washington Township	Burlington	672	680	687	687	686	14	85	2.1%
Estell Manor City	Atlantic	1,722	1,730	1,735	1,729	1,734	12	86	0.7%
Medford Lakes Borough	Burlington	4,173	4,152	4,146	4,168	4,185	12	86	0.3%
Upper Township	Cape May	12,236	12,298	12,373	12,278	12,247	11	88	0.1%
Port Republic City	Atlantic	1,108	1,113	1,115	1,111	1,114	6	91	0.5%
Wrightstown Borough	Burlington	797	799	802	802	801	4	93	0.5%
Lakehurst Borough	Ocean	2,663	2,656	2,654	2,662	2,664	1	98	0.0%
South Toms River Borough	Ocean	3,707	3,691	3,684	3,690	3,696	-11	109	-0.3%
Egg Harbor City	Atlantic	4,320	4,278	4,243	4,270	4,299	-21	115	-0.5%
Bass River Township	Burlington	1,462	1,450	1,443	1,444	1,440	-22	116	-1.5%
Buena Vista Township	Atlantic	7,602	7,587	7,570	7,557	7,577	-25	122	-0.3%
Dennis Township	Cape May	6,436	6,444	6,467	6,421	6,407	-29	125	-0.5%
Folsom Borough	Atlantic	1,908	1,895	1,885	1,881	1,873	-35	133	-1.8%
Shamong Township	Burlington	6,536	6,502	6,490	6,487	6,497	-39	137	-0.6%
Tabernacle Township	Burlington	7,020	6,972	6,949	6,984	6,978	-42	140	-0.6%
Franklin Township	Gloucester	16,791	16,809	16,820	16,791	16,741	-50	151	-0.3%
Woodbine Borough	Cape May	2,523	2,486	2,472	2,466	2,462	-61	159	-2.4%
Southampton Township	Burlington	10,516	10,474	10,464	10,470	10,453	-63	160	-0.6%
New Hanover Township	Burlington	8,053	7,651	7,385	7,832	7,859	-194	187	-2.4%
Pemberton Township	Burlington	28,192	27,999	27,912	27,936	27,944	-248	193	-0.9%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>									
Vineland City	Cumberland	60,020	60,422	60,724	60,864	60,854	834	11	1.4%
Toms River Township	Ocean	91,652	91,349	91,239	91,950	92,093	441	23	0.5%
North Hanover Township	Burlington	7,407	7,554	7,678	7,711	7,725	318	30	4.3%
Berlin Borough	Camden	7,365	7,491	7,588	7,601	7,606	241	34	3.3%
Springfield Township	Burlington	3,396	3,402	3,414	3,415	3,414	18	80	0.5%
Corbin City	Atlantic	491	492	492	497	502	11	88	2.2%

# R1 Building Permits for Dwelling Units

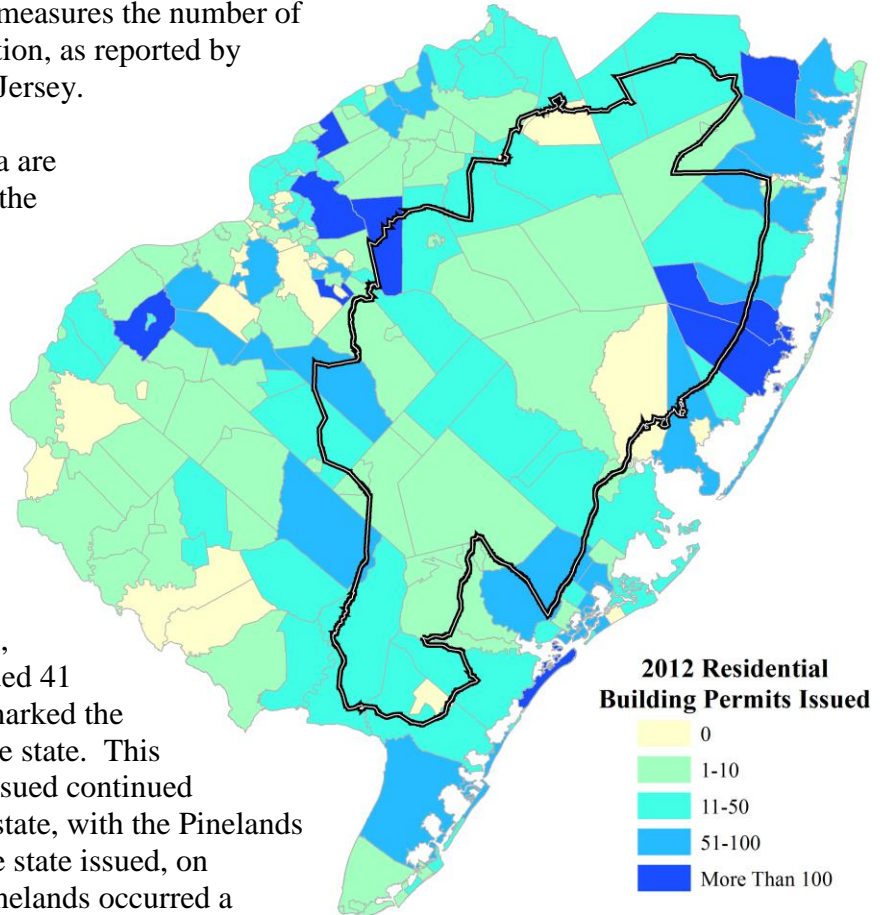
N.J. Department of Labor 1980 - 2012

In 2012, the average number of building permits issued per municipality in the Pinelands increased by 11.9% to 25 permits (the first increase since 2003). Permits issued in the Non-Pinelands and the state rose by 15.1% (to 21) and 38.5% (to 32), respectively.

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

**Unit of Analysis:** Municipal level data are aggregated to allow for inside/outside the Pinelands and statewide analysis. The aggregation method calculates the average units authorized by the municipalities.

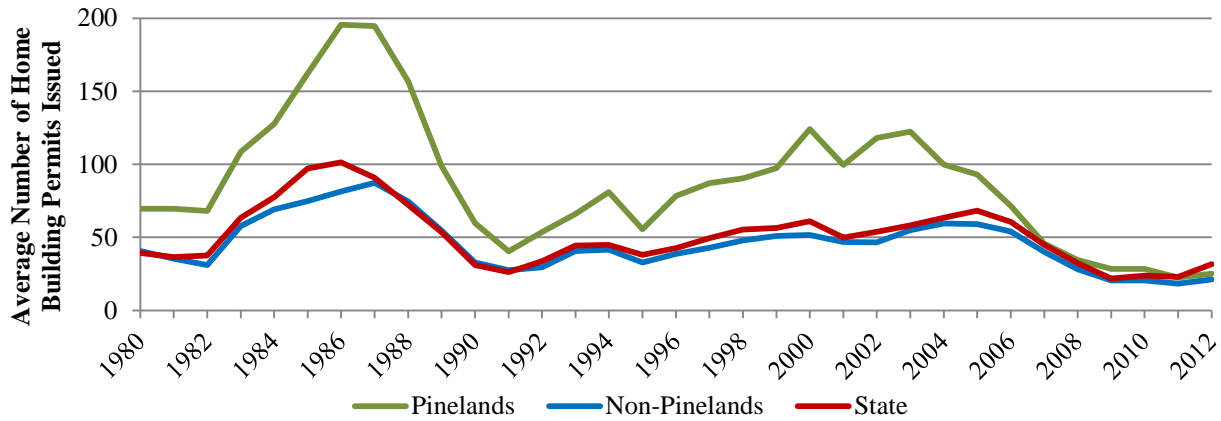
**Findings:** Beginning in the early 1980's and extending into the early 1990's, the Pinelands saw a greater average number of building permits issued than anywhere else in the state. In 1980, the average number of permits issued in the Pinelands was 70, while the Non-Pinelands and state issued 41 and 39, respectively. The year 1983 marked the beginning of a rapid increase across the state. This increase in average building permits issued continued until 1986 in the Pinelands and in the state, with the Pinelands issuing a high of 196 permits while the state issued, on average, 101. The apex in the Non-Pinelands occurred a year later when municipalities issued an average of 87 building permits. The 1986 high for the Pinelands was an increase of 180.9% over 1980.



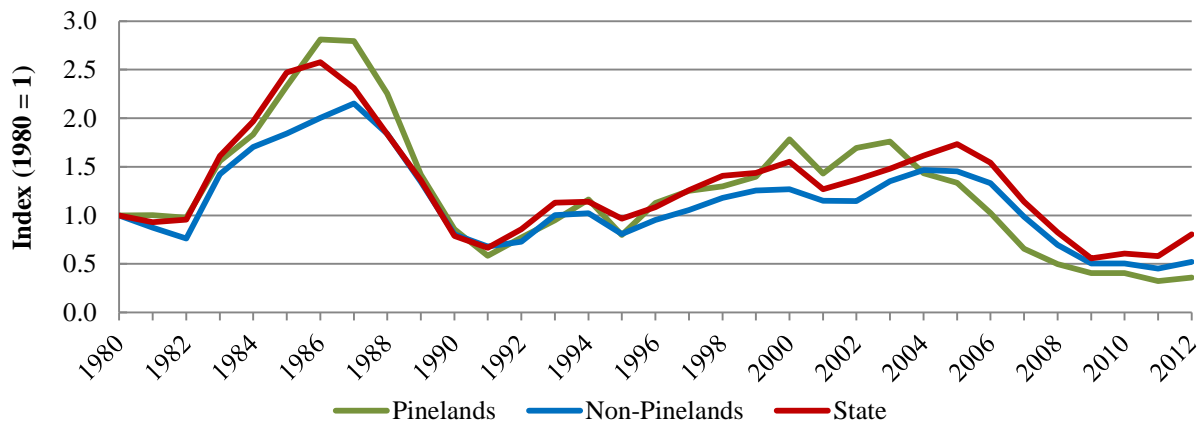
The year 1987 marked the beginning of a decline in average building permits issued in New Jersey. The decrease in permits issued continued until 1991. At that point, the Pinelands had fallen to an average of 41 permits issued (a decrease of 79.3% from the 1986 high point). The state bottomed out in 1991, issuing an average of 26 residential building permits per municipality (a decline of 74.1% from 1986), while the Non-Pinelands dropped to their low with an average of 28 permits (a decline of 68.4% from their 1987 high point).

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

### Average Residential Units Authorized by Building Permits



### Index of Residential Units Authorized by Building Permits



While the state fell to its low point in 2009 (an average of 22 permits issued), the Pinelands and the Non-Pinelands saw their low point in permits issued as recently as 2011. At that point, the Pinelands had issued, on average, 22 permits while the Non-Pinelands issued 18 permits. In 2012, all three regions have shown growth. The average number of permits issued in the Pinelands grew by 11.9% to 25 and the Non-Pinelands increased their issuance by 15.1% to 21 permits. From the 2009 low-point for the state, the average number of permits issued grew by 44.4% to 32 permits. Overall, the Pinelands have lost the “lead” that it enjoyed from 1980 to 2007, and now all three regions are roughly the same.

In the individual municipalities, Barnegat Township saw the greatest gains from 2011, issuing 161 total residential building permits in 2012; an increase of 215.7% over 2011. Stafford Township issued the next highest at 130 permits; a decrease of 38 (22.6%) total permits from the year prior. Evesham Township was the only other municipality to issue more than 100 building permits. In 2012, Evesham Township issued 101 building permits, a 173.0% increase from 2011. Five municipalities did not issue any permits: Bass River Township, Wrightstown Borough, South Toms River Borough, New Hanover Township, and Woodbine Borough. Seventeen municipalities issued between one and 10 permits while five of those only issued one. Of the 42 municipalities that did issue building permits in 2012, the average was about 28 while the median issued was 13.

Twenty-three of the Pinelands municipalities issued more residential building permits in 2012 than they did in 2011, with an average increase of about 14 permits. The largest positive change occurred in Barnegat Township (up 110 permits) and Evesham Township (up 64 permits). Of the municipalities

showing positive growth in building permits, 16 issued less than 10. Seven municipalities showed no change in the number issued over 2011 and 17 showed a decrease in the number issued. Of those issuing less in 2012 than in 2011, three issued at least 20 less than in 2011. The largest negative changes happened in Hamilton Township (down 46), Stafford Township (down 38), and Jackson Township (down 35).



Table R1

## Residential Building Permits Issued

Municipality	County	2008	2009	2010	2011	2012	5-Year Total	5-Year Average	5-Year Change	5-Year % Change
Medford Township	Burlington	2	21	37	54	47	161	32.2	45	2250.0%
Waterford Township	Camden	17	13	16	22	38	106	21.2	21	123.5%
Barnegat Township	Ocean	143	142	118	51	161	615	123	18	12.6%
Berkeley Township	Ocean	57	41	71	56	71	296	59.2	14	24.6%
Lakehurst Borough	Ocean	0	0	2	0	7	9	1.8	7	
Evesham Township	Burlington	95	131	55	37	101	419	83.8	6	6.3%
Egg Harbor City	Atlantic	8	9	15	14	13	59	11.8	5	62.5%
Little Egg Harbor Township	Ocean	53	55	72	76	57	313	62.6	4	7.5%
Maurice River Township	Cumberland	9	7	11	7	13	47	9.4	4	44.4%
Woodland Township	Burlington	5	3	5	3	9	25	5	4	80.0%
Lacey Township	Ocean	47	37	27	45	50	206	41.2	3	6.4%
Dennis Township	Cape May	9	8	8	10	11	46	9.2	2	22.2%
Washington Township	Burlington	2	1	3	2	4	12	2.4	2	100.0%
Plumsted Township	Ocean	15	13	15	14	16	73	14.6	1	6.7%
Mullica Township	Atlantic	15	15	12	12	16	70	14	1	6.7%
Port Republic City	Atlantic	2	0	0	1	3	6	1.2	1	50.0%
Berlin Township	Camden	21	21	27	17	21	107	21.4	0	0.0%
Eagleswood Township	Ocean	11	9	11	10	11	52	10.4	0	0.0%
Shamong Township	Burlington	9	7	9	9	9	43	8.6	0	0.0%
Folsom Borough	Atlantic	2	0	1	1	2	6	1.2	0	0.0%
South Toms River Borough	Ocean	0	0	1	1	0	2	0.4	0	0.0%
Bass River Township	Burlington	0	2	0	0	0	2	0.4	0	0.0%
Upper Township	Cape May	14	10	13	12	13	62	12.4	-1	-7.1%
Wrightstown Borough	Burlington	1	0	0	0	0	1	0.2	-1	-100.0%
Pemberton Township	Burlington	19	28	18	22	17	104	20.8	-2	-10.5%
Beachwood Borough	Ocean	6	11	5	9	4	35	7	-2	-33.3%
Weymouth Township	Atlantic	3	2	1	1	1	8	1.6	-2	-66.7%
Medford Lakes Borough	Burlington	10	7	9	8	7	41	8.2	-3	-30.0%
Estell Manor City	Atlantic	5	6	3	2	2	18	3.6	-3	-60.0%
New Hanover Township	Burlington	3	4	4	2	0	13	2.6	-3	-100.0%
Manchester Township	Ocean	4	1	3	1	1	10	2	-3	-75.0%
Ocean Township	Ocean	68	90	42	37	64	301	60.2	-4	-5.9%
Hammonton Town	Atlantic	19	15	5	10	15	64	12.8	-4	-21.1%
Hamilton Township	Atlantic	10	85	85	51	5	236	47.2	-5	-50.0%
Buena Vista Township	Atlantic	9	14	5	7	4	39	7.8	-5	-55.6%
Franklin Township	Gloucester	25	19	19	14	18	95	19	-7	-28.0%
Southampton Township	Burlington	19	13	13	10	12	67	13.4	-7	-36.8%
Buena Borough	Atlantic	8	1	4	2	1	16	3.2	-7	-87.5%
Chesilhurst Borough	Camden	10	7	5	4	1	27	5.4	-9	-90.0%
Tabernacle Township	Burlington	10	5	2	1	1	19	3.8	-9	-90.0%
Woodbine Borough	Cape May	19	13	6	3	0	41	8.2	-19	-100.0%
Monroe Township	Gloucester	104	89	208	63	61	525	105	-43	-41.3%
Stafford Township	Ocean	192	53	58	168	130	601	120.2	-62	-32.3%
Galloway Township	Atlantic	104	35	16	21	32	208	41.6	-72	-69.2%
Jackson Township	Ocean	141	110	155	80	45	531	106.2	-96	-68.1%
Egg Harbor Township	Atlantic	186	139	101	64	81	571	114.2	-105	-56.5%
Winslow Township	Camden	115	41	36	20	4	216	43.2	-111	-96.5%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>										
Springfield Township	Burlington	0	1	1	2	2	6	1.2	2	
North Hanover Township	Burlington	12	8	11	9	11	51	10.2	-1	-8.3%
Corbin City	Atlantic	6	2	5	2	1	16	3.2	-5	-83.3%
Berlin Borough	Camden	13	12	9	7	4	45	9	-9	-69.2%
Vineland City	Cumberland	142	97	77	79	75	470	94	-67	-47.2%
Toms River Township	Ocean	347	69	368	103	76	963	192.6	-271	-78.1%

# R2 Residential Real Estate Transactions

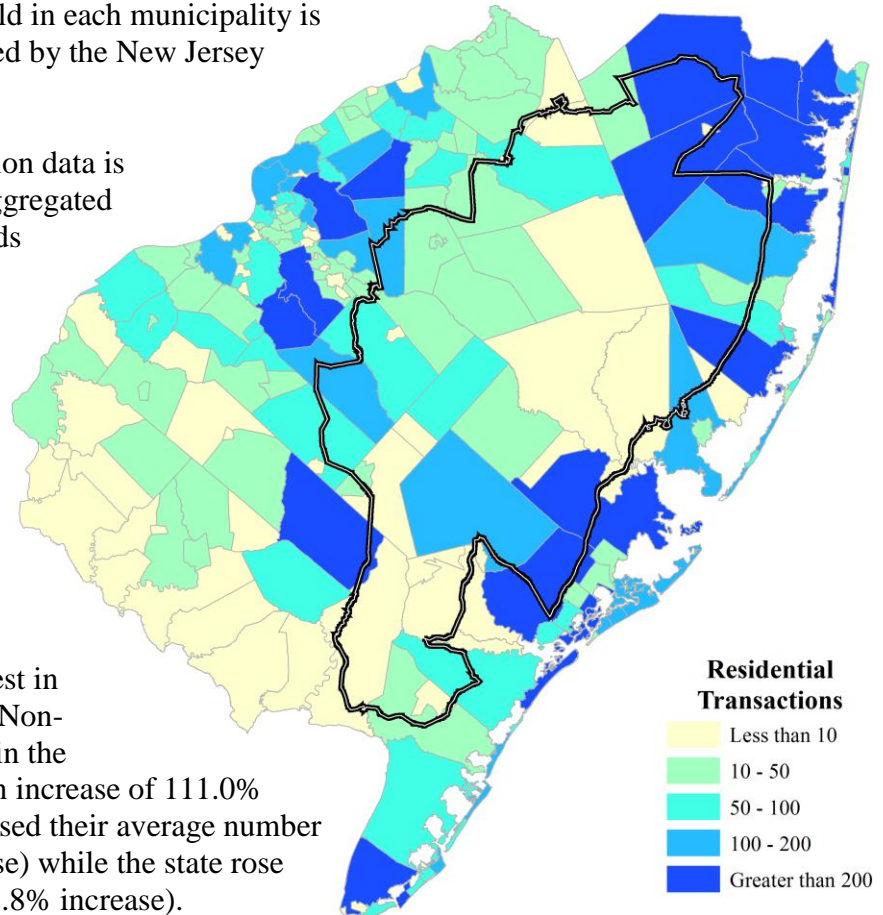
N.J. Department of the Treasury, Division of Taxation 1994 - 2012

The average number of residential real estate transactions stayed roughly stable in 2012. The Pinelands fell to 66 transactions (down 3.3%) while the Non-Pinelands rose to 61 transactions (up 8.7%) and the state rose to 73 transactions (up 4.4%)

**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:** Real estate transaction data is compiled at the municipal level and aggregated to allow for inside/outside the Pinelands and state analysis.

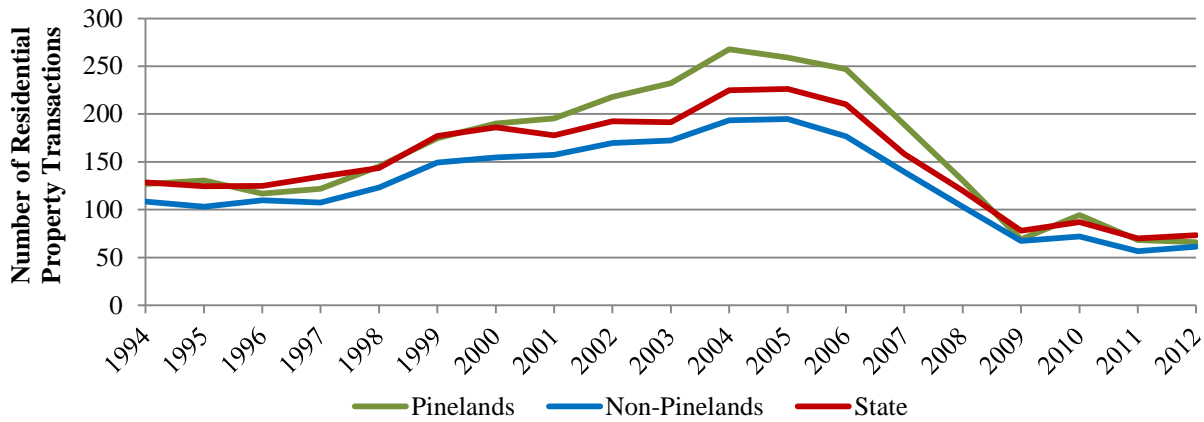
**Findings:** Throughout much of the monitoring period (1994 through 2012), the Pinelands had more transactions per municipality than the Non-Pinelands and the state. The mid-1990's showed all three regions hovering between 100 and 150 transactions a year per municipality. In the latter part of the decade, transactions rose to their highest in 2004 in the Pinelands and 2005 in the Non-Pinelands and the state. Transactions in the Pinelands rose to an average of 268, an increase of 111.0% from 1994. The Non-Pinelands increased their average number of transactions to 195 (a 79.8% increase) while the state rose to an average of 226 transactions (a 75.8% increase).



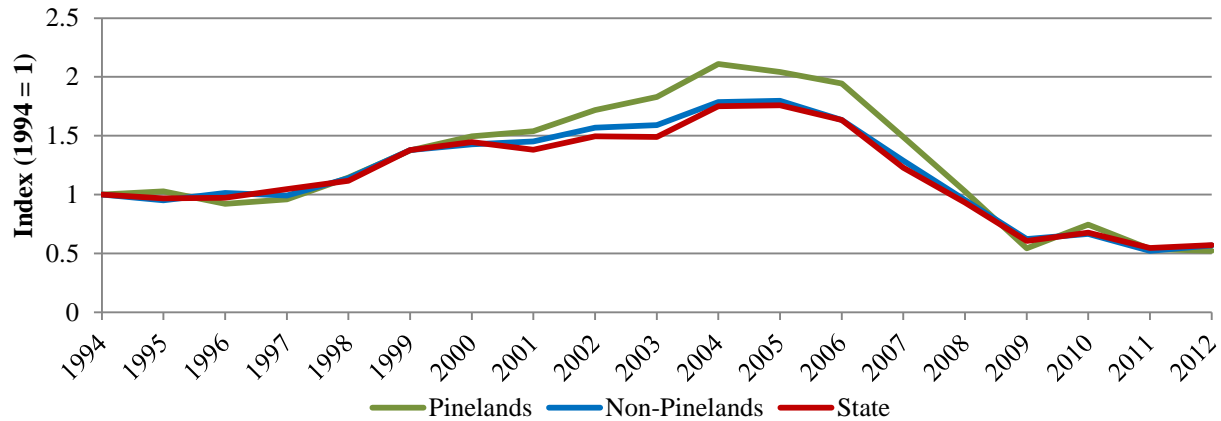
A year later, all three regions declined as the nation-wide housing market began to tumble. The decline that began in the mid-2000's continued until about 2009, when the average number of transactions began to stabilize. The average number of housing transactions in the Pinelands in 2009 was 69 while the Non-Pinelands and the state had an average of 67 and 78 transactions, respectively. In 2010, the average number of transactions briefly increased, but then decreased again in 2011.

In 2012, the Pinelands was the only region to see their average number of housing transactions decrease, albeit slightly; the Pinelands fell by 2 to an average of 66; a decrease of 3.3% from 2011. The Non-Pinelands saw their average transactions increase by 8.7% to 61 in 2012 and the state saw their average increase by 4.4% to 73. For comparison, the northern half of New Jersey is currently averaging 79 home transactions; a 3.9% increase from 2011.

### Average Number of Residential Property Transactions



### Index of Residential Property Transactions



Among the individual Pinelands municipalities (those with at least 10% of their land area in the Pinelands Area), Berkeley Township had the greatest number of housing transactions in 2012 at 319, a 33.5% increase from 2011. Jackson Township has the second most at 311, a 24.9% increase. Chesilhurst Borough was the only municipality to not have a single transaction while Woodbine Borough, Wrightstown Borough, and Washington Township each had one transaction.

Overall, 15 municipalities saw an increase in the number of housing transactions in 2012; five of those saw 50 or more transactions while six municipalities had fewer than ten. The average increase was about 29 transactions. Four municipalities did not see any change in the number of transactions, while 28 saw decreases. Most of the negative change was decreases of less than 50. However, three municipalities had decreases of 55, 110, and 124 (Southampton Township, Medford Township, and Winslow Township, respectively). Of those with decreases of less than 50 transactions, 17 saw declines of less than ten. The average decrease in 2012 was about 19 transactions.

Table R2

## Residential Housing Transactions

Municipality	County	2008	2009	2010	2011	2012	5 Year Change	5 Year % Change	5 Year Average
Monroe Township	Gloucester	89	172	195	117	167	78	87.6%	148
Bass River Township	Burlington	3	3	6	2	4	1	33.3%	4
Washington Township	Burlington	1	3	3	1	1	0	0.0%	2
Wrightstown Borough	Burlington	1	3	2	1	1	0	0.0%	2
Chesilhurst Borough	Camden	0	2	3	6	0	0	0.0%	2
Buena Vista Township	Atlantic	4	16	8	12	3	-1	-25.0%	9
Port Republic City	Atlantic	9	4	9	7	5	-4	-44.4%	7
Weymouth Township	Atlantic	7	6	10	4	3	-4	-57.1%	6
New Hanover Township	Burlington	6	5	8	1	2	-4	-66.7%	4
Estell Manor City	Atlantic	13	6	7	5	8	-5	-38.5%	8
Woodland Township	Burlington	11	4	14	5	5	-6	-54.5%	8
Eagleswood Township	Ocean	12	4	6	7	5	-7	-58.3%	7
Mullica Township	Atlantic	42	29	35	31	33	-9	-21.4%	34
Woodbine Borough	Cape May	11	0	6	1	1	-10	-90.9%	4
Folsom Borough	Atlantic	18	10	9	11	6	-12	-66.7%	11
Lakehurst Borough	Ocean	20	8	9	6	5	-15	-75.0%	10
Maurice River Township	Cumberland	20	14	5	13	4	-16	-80.0%	11
Dennis Township	Cape May	38	20	36	22	21	-17	-44.7%	27
Tabernacle Township	Burlington	48	43	49	46	28	-20	-41.7%	43
Buena Borough	Atlantic	34	13	20	19	11	-23	-67.6%	19
Plumsted Township	Ocean	54	24	24	22	31	-23	-42.6%	31
Hammonton Town	Atlantic	78	80	61	60	54	-24	-30.8%	67
South Toms River Borough	Ocean	27	15	5	6	3	-24	-88.9%	11
Shamong Township	Burlington	47	24	35	39	19	-28	-59.6%	33
Egg Harbor City	Atlantic	33	12	14	17	4	-29	-87.9%	16
Medford Lakes Borough	Burlington	51	43	7	26	17	-34	-66.7%	29
Berlin Township	Camden	48	16	17	15	14	-34	-70.8%	22
Upper Township	Cape May	119	51	67	78	84	-35	-29.4%	80
Barneget Township	Ocean	133	89	76	35	89	-44	-33.1%	84
Beachwood Borough	Ocean	80	47	63	42	31	-49	-61.3%	53
Waterford Township	Camden	110	66	77	32	49	-61	-55.5%	67
Franklin Township	Gloucester	121	92	91	59	56	-65	-53.7%	84
Ocean Township	Ocean	89	71	66	58	20	-69	-77.5%	61
Stafford Township	Ocean	331	210	277	217	237	-94	-28.4%	254
Manchester Township	Ocean	318	70	215	181	210	-108	-34.0%	199
Southampton Township	Burlington	148	95	115	88	33	-115	-77.7%	96
Egg Harbor Township	Atlantic	383	237	332	226	258	-125	-32.6%	287
Little Egg Harbor Township	Ocean	269	136	193	132	126	-143	-53.2%	171
Berkeley Township	Ocean	464	265	150	239	319	-145	-31.3%	287
Medford Township	Burlington	209	147	182	159	49	-160	-76.6%	149
Hamilton Township	Atlantic	286	197	239	48	114	-172	-60.1%	177
Lacey Township	Ocean	301	89	217	159	129	-172	-57.1%	179
Pemberton Township	Burlington	277	178	189	119	91	-186	-67.1%	171
Jackson Township	Ocean	513	120	393	249	311	-202	-39.4%	317
Galloway Township	Atlantic	416	86	302	227	209	-207	-49.8%	248
Evesham Township	Burlington	399	145	376	179	176	-223	-55.9%	255
Winslow Township	Camden	444	271	220	183	59	-385	-86.7%	235
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>									
Corbin City	Atlantic	1	4	1	1	2	1	100.0%	2
Springfield Township	Burlington	19	15	14	7	16	-3	-15.8%	14
North Hanover Township	Burlington	22	18	12	6	6	-16	-72.7%	13
Berlin Borough	Camden	63	45	53	11	43	-20	-31.7%	43
Vineland City	Cumberland	343	223	303	196	236	-107	-31.2%	260
Toms River Township	Ocean	1093	244	891	523	508	-585	-53.5%	652

# R3

## Average Selling Price of Homes

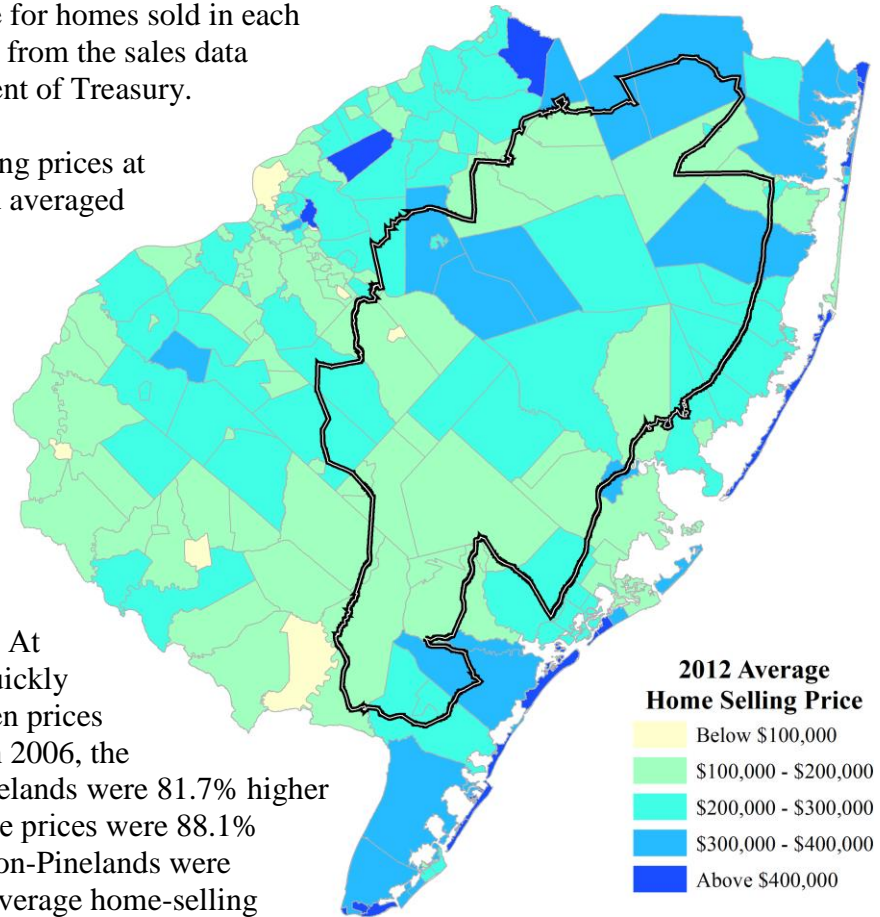
N.J. Department of the Treasury, Division of Taxation 1994 - 2012

For the fourth straight year, the average selling prices of homes fell in all regions by a similar percent. In 2012, home-selling prices in the Pinelands fell by 7.3% to \$225,101. Prices in the Non-Pinelands fell by 6.0%, and the state prices fell by 5.8%.

**Description:** The average selling price for homes sold in each municipality in a given year is derived from the sales data compiled by the New Jersey Department of Treasury.

**Unit of Analysis:** Average home-selling prices at the municipal level are aggregated and averaged for Pinelands/Non-Pinelands and state analysis. Unless otherwise noted, all dollar amounts are adjusted for inflation to 2012 dollars.

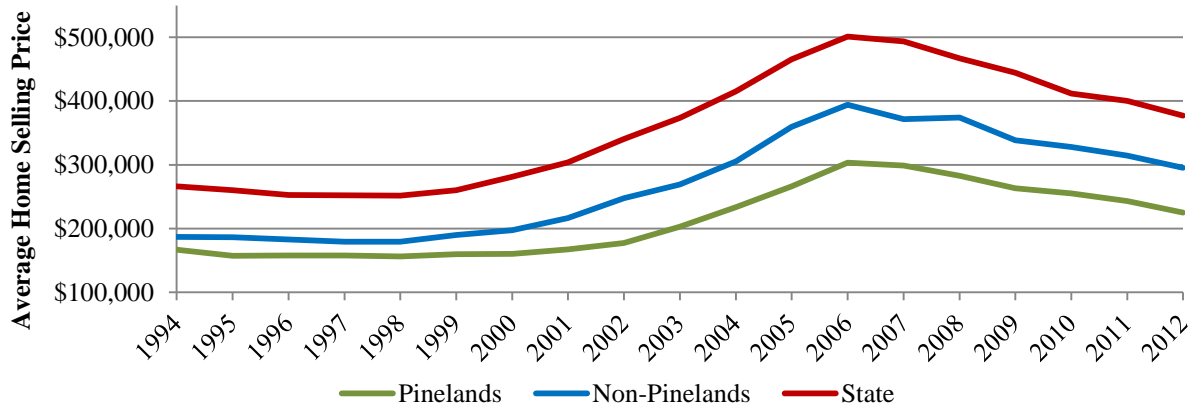
**Findings:** The average home-selling prices for all three regions follow a similar pattern to one another throughout the monitoring period from 1994 to 2012. Prices in 1994 began a slight decline before leveling out in the mid-to-late 1990's. At the end of the decade, selling prices quickly ascended up until the mid-2000's, when prices reached their highest point in 2006. In 2006, the average home-selling prices in the Pinelands were 81.7% higher than those in 1994. The state's average prices were 88.1% higher in 2006 than in 1994 and the Non-Pinelands were 111.1% higher. Since that point, the average home-selling prices have declined to their 2012 averages.



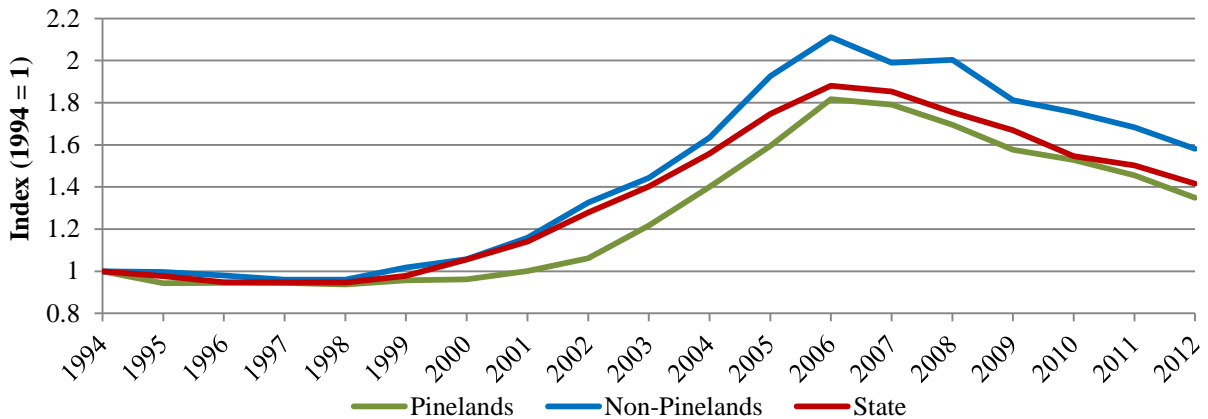
In the Pinelands, the average 2012 selling price was \$225,101, a 7.3% decrease from 2011. Although all three regions were roughly similar in their decline, this was greatest decrease experienced among the regions for the year. The Non-Pinelands fell by 6.0% to a \$295,377 average while the state, influenced by higher prices in northern New Jersey, only fell by 5.8% to \$377,218.

When comparing the regions based on an index with 1994 being the base year, one sees that the Pinelands trailed in the growth of home prices compared to the rest of the state and especially the Non-Pinelands. In addition, the Non-Pinelands saw much greater growth than the rest of the state while also better weathering the most recent declines.

### Average Home Selling Price



### Index of Average Home Selling Price



Among the individual municipalities with at least 10% of their land in the Pinelands Area, Upper Township’s average selling price is the highest at \$354,167; a 0.8% increase over 2011. Shamong Township has the second highest selling price at \$331,684; a 0.8% increase over 2011. Among the lowest home-selling prices, South Toms River Borough has the lowest average price of \$142,000. Buena Vista Township has the next lowest of \$142,333 (declines from 2011 of 26.9% and 37.9%, respectively).

Of the 43 municipalities, 12 showed increases, with an average increase of 9.7%. Nine of those with increases in average selling prices increased by less than 7%, while the remaining three increased by more than 20%. Meanwhile, 34 municipalities experienced decreases in their average home sale prices; the average decrease was 13.8%. Of those showing decreases, 15 declined by less than 10% while eight decreased by more than 20%.

Table R3

## Median Selling Price of Homes

Municipality	County	2008	2009	2010	2011	2012	2012 South N.J. Rank
Upper Township	Cape May	\$368,632	\$372,587	\$370,354	\$351,458	\$354,167	26
Shamong Township	Burlington	\$484,207	\$396,655	\$397,338	\$328,985	\$331,684	32
Tabernacle Township	Burlington	\$355,803	\$358,810	\$320,752	\$333,660	\$326,007	33
Port Republic City	Atlantic	\$337,923	\$331,088	\$267,136	\$318,603	\$324,500	34
Medford Township	Burlington	\$420,736	\$402,012	\$362,896	\$369,347	\$317,841	36
Jackson Township	Ocean	\$370,456	\$325,635	\$338,184	\$323,828	\$310,746	37
Lacey Township	Ocean	\$334,729	\$295,568	\$293,667	\$304,956	\$310,013	38
Plumsted Township	Ocean	\$380,140	\$324,506	\$323,205	\$302,678	\$302,796	43
Medford Lakes Borough	Burlington	\$320,688	\$338,447	\$370,625	\$291,995	\$296,547	47
Washington Township	Burlington	\$234,603	\$257,200	\$298,325	\$211,794	\$294,000	48
Ocean Township	Ocean	\$305,661	\$332,736	\$320,995	\$309,753	\$293,318	50
Evesham Township	Burlington	\$282,605	\$285,315	\$263,083	\$285,585	\$282,807	54
Stafford Township	Ocean	\$357,750	\$328,252	\$317,316	\$307,881	\$270,221	58
Woodbine Borough	Cape May	\$213,702	-	\$198,545	\$306,207	\$270,000	59
Woodland Township	Burlington	\$332,157	\$215,348	\$229,302	\$206,895	\$257,160	63
Eagleswood Township	Ocean	\$272,948	\$245,072	\$241,819	\$227,250	\$242,000	72
Lakehurst Borough	Ocean	\$234,624	\$238,517	\$204,792	\$174,709	\$241,380	73
Barneget Township	Ocean	\$309,658	\$309,905	\$292,830	\$249,968	\$238,356	76
Hammonton Town	Atlantic	\$236,271	\$232,586	\$236,977	\$225,243	\$226,681	81
Dennis Township	Cape May	\$324,653	\$288,962	\$275,422	\$271,337	\$220,524	85
Beachwood Borough	Ocean	\$287,161	\$278,730	\$269,677	\$227,838	\$217,981	89
Egg Harbor Township	Atlantic	\$283,076	\$270,728	\$261,511	\$247,783	\$216,837	91
Little Egg Harbor Township	Ocean	\$276,582	\$264,647	\$240,744	\$217,024	\$209,204	97
Monroe Township	Gloucester	\$258,717	\$241,792	\$223,877	\$207,108	\$204,910	102
Franklin Township	Gloucester	\$249,111	\$236,293	\$220,950	\$211,481	\$203,832	103
Mullica Township	Atlantic	\$292,232	\$281,984	\$235,323	\$240,572	\$200,492	108
Galloway Township	Atlantic	\$229,760	\$224,014	\$214,405	\$214,383	\$199,843	109
Hamilton Township	Atlantic	\$231,227	\$216,838	\$193,723	\$197,834	\$197,152	111
Berkeley Township	Ocean	\$272,741	\$257,414	\$236,611	\$234,671	\$194,288	115
Folsom Borough	Atlantic	\$221,513	\$201,237	\$177,743	\$195,096	\$183,583	121
Pemberton Township	Burlington	\$208,889	\$199,518	\$182,732	\$174,612	\$176,273	126
Waterford Township	Camden	\$229,030	\$224,454	\$206,419	\$204,779	\$175,153	129
Winslow Township	Camden	\$216,384	\$219,467	\$205,979	\$191,847	\$174,988	130
Berlin Township	Camden	\$219,084	\$211,882	\$187,549	\$176,733	\$174,339	131
Manchester Township	Ocean	\$242,109	\$236,022	\$205,598	\$205,868	\$173,162	134
Southampton Township	Burlington	\$261,333	\$209,513	\$224,217	\$195,880	\$173,153	135
Maurice River Township	Cumberland	\$209,122	\$180,547	\$222,796	\$223,995	\$172,750	136
Weymouth Township	Atlantic	\$361,783	\$208,311	\$251,278	\$236,163	\$171,833	139
Bass River Township	Burlington	\$344,618	\$316,418	\$306,748	\$236,801	\$166,875	144
Estell Manor City	Atlantic	\$248,343	\$327,833	\$246,262	\$230,473	\$165,863	146
Buena Borough	Atlantic	\$184,087	\$178,880	\$182,833	\$182,613	\$162,027	150
New Hanover Township	Burlington	\$360,257	\$301,471	\$312,083	\$239,863	\$153,286	162
Egg Harbor City	Atlantic	\$214,297	\$181,129	\$178,533	\$147,749	\$146,750	171
Wrightstown Borough	Burlington	\$181,284	\$171,943	\$224,692	\$287,836	\$145,000	173
Buena Vista Township	Atlantic	\$218,554	\$204,375	\$231,839	\$229,052	\$142,333	174
South Toms River Borough	Ocean	\$233,170	\$230,438	\$199,137	\$194,323	\$142,000	176
Chesilhurst Borough	Camden	-	\$149,826	\$216,689	\$160,419	-	199
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	\$380,960	\$358,424	\$366,061	\$378,383	\$345,132	28
North Hanover Township	Burlington	\$357,488	\$362,906	\$339,214	\$270,654	\$332,150	31
Corbin City	Atlantic	\$47,987	\$109,360	\$250,593	\$279,670	\$322,500	35
Springfield Township	Burlington	\$397,110	\$297,305	\$376,033	\$241,467	\$287,094	52
Berlin Borough	Camden	\$277,408	\$267,991	\$242,470	\$239,061	\$214,064	93
Vineland City	Cumberland	\$200,576	\$192,756	\$189,783	\$171,953	\$170,908	140

# E1 Per Capita Income

N.J. Department of Labor 1979, 1989, 1999, 2010  
ESRI 2012

Estimates for 2012 show a decrease in per capita income across all three regions. The Pinelands per capita income fell by 5.1% from 2010, while the Non-Pinelands and state fell by an estimated 5.8% and 7.6%, respectively.

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

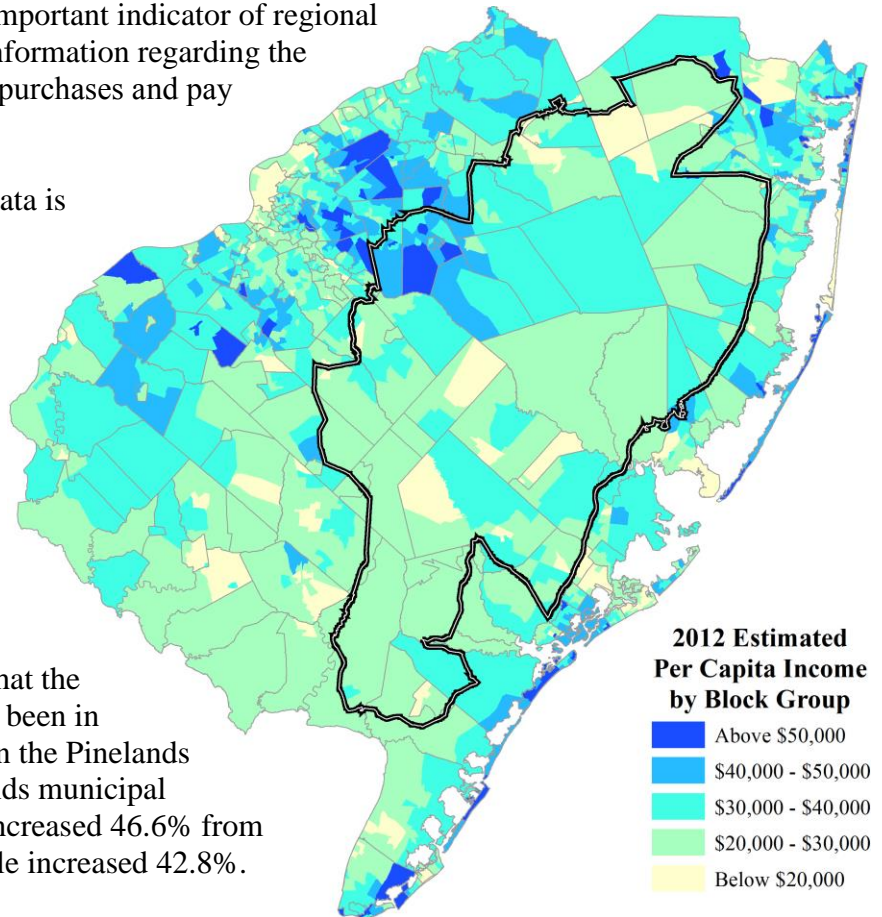
**Unit of Analysis:** Per capita income data is compiled at the municipal level and aggregated to allow for inside/outside the Pinelands and statewide analysis. Estimates at the block group scale are also available for 2012 to analyze regional differences in finer detail than that allowed by aggregated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

**Findings:** For the first three decades that the Comprehensive Management Plan has been in effect, the average per capita income in the Pinelands increased by 52.5%. The Non-Pinelands municipal aggregate per capita income average increased 46.6% from 1979 to 2010, while the state as a whole increased 42.8%.

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

Up to this point (2010), the state is the only entity of the three regions of interest to experience a *decrease* in per capita income over a ten-year period. From 1999 to 2010, the state's per capita income fell \$515 (1.4%) while the Pinelands and the Non-Pinelands grew by \$1,155 (3.9%) and \$781 (2.3%), respectively.

Recent estimates for 2012 show a decrease for the entire state, including the Pinelands and the Non-Pinelands. According to these estimates, the state's per capita income fell by 7.6% from 2010 to 2012, the Non-Pinelands fell by 5.8%, and the Pinelands fell by 5.1%. However, five-year estimates for 2017 (not shown here) suggest that all three regions will show growth in the coming years; the state and the Non-Pinelands are predicted to have growth of around \$5,000, while the Pinelands is predicted to grow by about \$4,000.





At the finer block group-level scale, the 2012 estimated per capita income in the Pinelands is \$29,686. The Non-Pinelands have an estimated per capita income of \$30,605. In 2017, per capita incomes are estimated to rise by about 13% in the Pinelands and 14% in the Non-Pinelands. These numbers closely match the aggregated 2012 municipal estimates as seen described in the chart below.

### Per Capita Income

Region	1979	1989	1999	2010	2012 Estimate	% Change 2010 - 2012	% Change 1979 - 2012
Pinelands	\$20,160	\$27,237	\$29,588	\$30,743	\$29,176	-5.1%	44.7%
Non-Pinelands	\$23,584	\$32,684	\$33,796	\$34,577	\$32,566	-5.8%	38.1%
New Jersey	\$25,701	\$34,650	\$37,217	\$36,702	\$33,924	-7.6%	32.0%

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

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

Table E1

## Per Capita Income

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

# E2 Unemployment

N.J. Department of Labor 1990 - 2012

After a brief downtick in 2011, New Jersey unemployment rates rose in 2012. The 2012 rate of unemployment in the Pinelands was 10.7%, 11.0% in the Non-Pinelands, and 9.5% in the state overall.

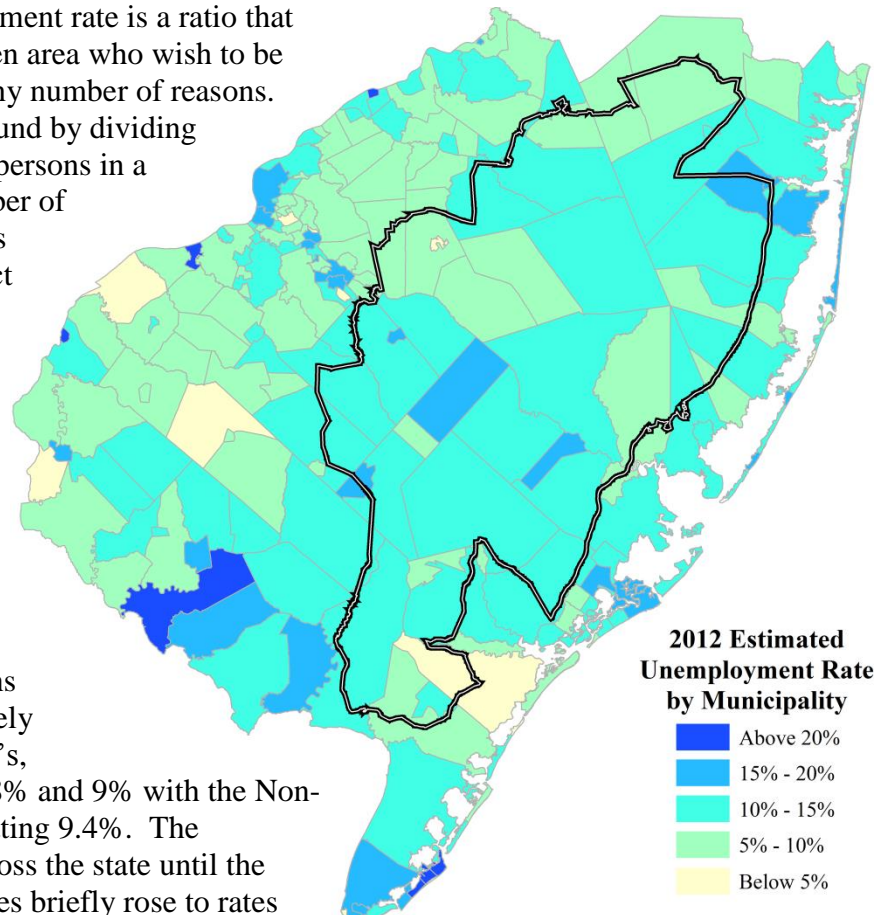
**Description:** The estimated unemployment rate is a ratio that reflects the number of people in a given area who wish to be employed, but are not employed for any number of reasons. The unemployment rate estimate is found by dividing the estimated number of unemployed persons in a given area by the 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 aggregated to allow for inside/outside the Pinelands and statewide analysis.

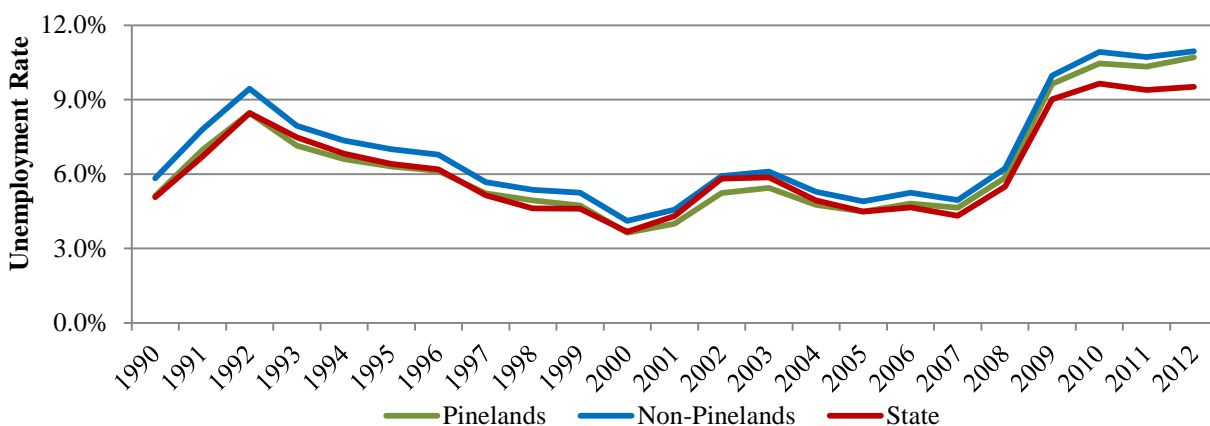
**Findings:** From 1990 onwards, regions throughout the state have tracked closely together. Beginning in the early 1990's, unemployment rates rose to between 8% and 9% with the Non-Pinelands municipal aggregate rate hitting 9.4%. The following years exhibited declines across the state until the early 2000's, when unemployment rates briefly rose to rates between 5% and 6%, but then returned to their late 1990's levels. The year 2007 marked the beginning of rising unemployment rates; rates increased from about 4% up to 9% over a two-year period before leveling off between 9% and 11%. Recently, the 2012 Long-Term Economic Monitoring Report reported that unemployment rates fell in 2011, however that slight decrease has reversed itself and 2012 rates across all regions returned close to their 2010 recent highs.

Throughout the mid-1990's and the early 2000's, the aggregate unemployment rate of the Pinelands municipalities has mostly been lower than that of the state's unemployment rate. The two have tracked so closely that only recently in 2009 has the difference exceeded +/- 0.6 percentage points, with the state showing a recent history of lower unemployment rates.

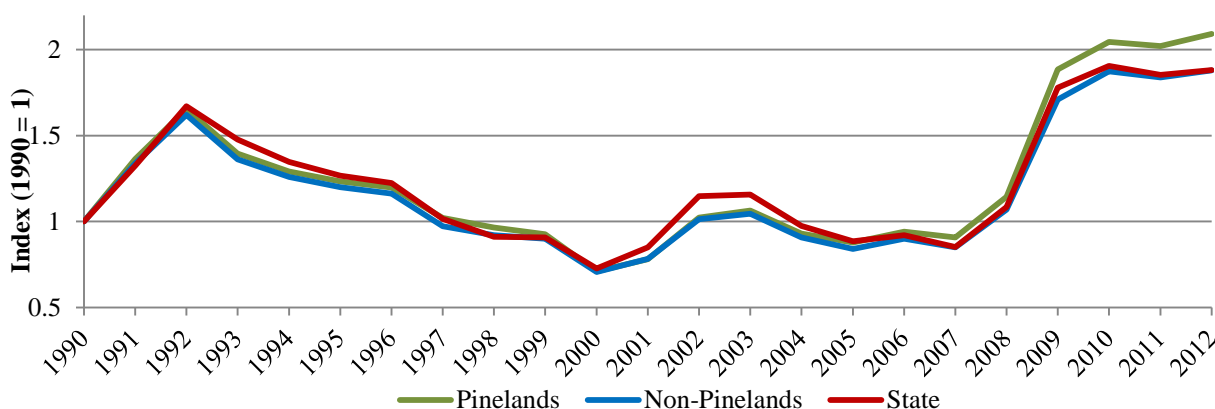
When comparing the Pinelands municipal unemployment rate to that of the Non-Pinelands municipal unemployment rate, the Pinelands rate has consistently been lower. For every year since 1990, the Pinelands rate has been lower than that of the Non-Pinelands by at least 0.3 percentage points. In the last few years, however, the differences in rates have narrowed and, as of 2012, the difference is only 0.26 percentage points.



### Unemployment Rate



### Unemployment Rate Index



The 2012 municipal unemployment rate for the Pinelands is 10.7%; this is a 0.4 percentage points increase over 2011. The Non-Pinelands municipal aggregate unemployment rate in 2012 was 11%, an increase of 0.2 percentage points. Likewise, the overall New Jersey rate of 9.5% is a 0.1 percentage point increase over 2011 rates. Since 1990, the Pinelands rate has risen by 5.6 percentage points while the Non-Pinelands and the state overall have risen 5.1 and 4.5 percentage points, respectively.

Of the individual municipalities, Egg Harbor City experienced the highest unemployment rate in 2012 at 19.8%, a 0.7 percentage point increase over 2011. South Toms River Borough had the second highest rate at 17.1% (a 0.3 percentage point increase) followed by Hammonton Town, Chesilhurst Borough, Berkeley Township, and Buena Borough all of which had rates above 15%. Those municipalities with the lowest unemployment rates are Upper Township at 4.2% (a 0.3 percentage point increase from 2011), Medford Lakes Borough at 4.4%, Tabernacle Township at 5.2%, and Medford Township at 5.7%. Maurice River Township was the only Pinelands municipality to experience at least a 1% increase in unemployment over 2011 rates.

Table E2

## Estimated Unemployment Rates

Full Name	County	2008	2009	2010	2011	2012	5 Year Change (% points)
Egg Harbor City	Atlantic	10.9%	18.0%	19.4%	19.1%	19.8%	8.9%
South Toms River Borough	Ocean	9.7%	15.0%	17.2%	16.8%	17.1%	7.4%
Hammonton Town	Atlantic	9.1%	15.2%	16.5%	16.2%	16.8%	7.7%
Chesilhurst Borough	Camden	9.2%	14.8%	16.1%	15.6%	15.8%	6.6%
Berkeley Township	Ocean	8.8%	13.7%	14.6%	14.9%	15.6%	6.8%
Buena Borough	Atlantic	8.1%	13.7%	14.8%	14.6%	15.1%	7.0%
Lakehurst Borough	Ocean	8.4%	13.0%	14.9%	14.6%	14.9%	6.6%
Estell Manor City	Atlantic	7.9%	13.4%	14.5%	14.2%	14.8%	6.9%
Manchester Township	Ocean	5.8%	13.5%	14.4%	14.2%	14.5%	8.7%
Washington Township	Burlington	8.2%	13.0%	14.2%	13.9%	14.3%	6.0%
Woodbine Borough	Cape May	8.4%	11.6%	12.7%	13.1%	13.9%	5.5%
Mullica Township	Atlantic	7.2%	12.2%	13.3%	13.0%	13.6%	6.3%
Wrightstown Borough	Burlington	7.5%	12.3%	13.5%	13.2%	13.5%	6.0%
Ocean Township	Ocean	7.5%	11.6%	13.4%	13.1%	13.4%	5.9%
Hamilton Township	Atlantic	6.1%	10.4%	11.7%	11.9%	12.9%	6.8%
Franklin Township	Gloucester	6.9%	11.6%	12.9%	12.3%	12.7%	5.7%
Egg Harbor Township	Atlantic	6.2%	10.6%	11.2%	11.6%	12.2%	6.0%
Galloway Township	Atlantic	6.0%	10.4%	11.1%	11.5%	12.2%	6.2%
Little Egg Harbor Township	Ocean	6.6%	10.4%	12.0%	11.7%	11.9%	5.3%
Southampton Township	Burlington	6.6%	10.9%	11.9%	11.5%	11.9%	5.3%
Maurice River Township	Cumberland	5.2%	8.0%	10.2%	10.2%	11.4%	6.2%
Pemberton Township	Burlington	6.6%	10.3%	11.3%	11.0%	11.3%	4.7%
Buena Vista Township	Atlantic	5.9%	10.0%	10.9%	10.7%	11.1%	5.3%
Woodland Township	Burlington	6.2%	10.1%	11.1%	10.7%	11.1%	4.9%
Beachwood Borough	Ocean	6.1%	9.5%	11.0%	10.8%	11.0%	4.9%
Winslow Township	Camden	6.2%	10.3%	11.3%	10.8%	10.9%	4.7%
Monroe Township	Gloucester	6.2%	10.4%	10.9%	10.3%	10.4%	4.2%
Stafford Township	Ocean	8.9%	8.5%	9.7%	9.4%	10.3%	1.4%
Lacey Township	Ocean	5.4%	9.9%	10.3%	10.1%	10.2%	4.8%
Waterford Township	Camden	5.7%	9.5%	10.4%	10.0%	10.1%	4.4%
Barnegat Township	Ocean	5.3%	8.4%	9.7%	9.5%	9.7%	4.4%
Eagleswood Township	Ocean	5.2%	8.1%	9.6%	9.3%	9.5%	4.2%
Bass River Township	Burlington	5.2%	8.5%	9.4%	9.0%	9.4%	4.2%
Jackson Township	Ocean	5.6%	8.9%	9.3%	9.0%	9.2%	3.6%
Weymouth Township	Atlantic	4.3%	7.4%	8.1%	8.0%	8.3%	4.0%
New Hanover Township	Burlington	4.5%	7.5%	8.2%	7.9%	8.2%	3.7%
Dennis Township	Cape May	4.8%	6.7%	7.4%	7.7%	8.2%	3.4%
Port Republic City	Atlantic	4.2%	7.3%	7.9%	7.7%	8.0%	3.9%
Evesham Township	Burlington	4.0%	6.8%	7.2%	7.3%	7.5%	3.5%
Plumsted Township	Ocean	3.9%	6.2%	7.2%	7.0%	7.2%	3.3%
Shamong Township	Burlington	3.8%	6.4%	7.0%	6.8%	7.1%	3.3%
Folsom Borough	Atlantic	3.3%	5.8%	6.2%	6.2%	6.4%	3.2%
Berlin Township	Camden	3.5%	5.9%	6.4%	6.2%	6.3%	2.8%
Medford Township	Burlington	3.1%	5.2%	5.7%	5.5%	5.7%	2.7%
Tabernacle Township	Burlington	2.8%	4.7%	5.2%	5.0%	5.2%	2.4%
Medford Lakes Borough	Burlington	2.3%	4.0%	4.4%	4.2%	4.4%	2.1%
Upper Township	Cape May	2.4%	3.4%	3.8%	3.9%	4.2%	1.8%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Vinland City	Cumberland	8.2%	12.4%	13.3%	13.4%	13.8%	5.7%
North Hanover Township	Burlington	6.4%	10.5%	11.5%	11.1%	11.5%	5.2%
Toms River Township	Ocean	5.5%	9.1%	10.2%	9.9%	10.0%	4.5%
Corbin City	Atlantic	5.0%	8.8%	9.7%	9.5%	9.8%	4.9%
Springfield Township	Burlington	4.8%	8.1%	8.9%	8.6%	8.9%	4.0%
Berlin Borough	Camden	4.9%	8.1%	8.9%	8.5%	8.7%	3.8%

# E3

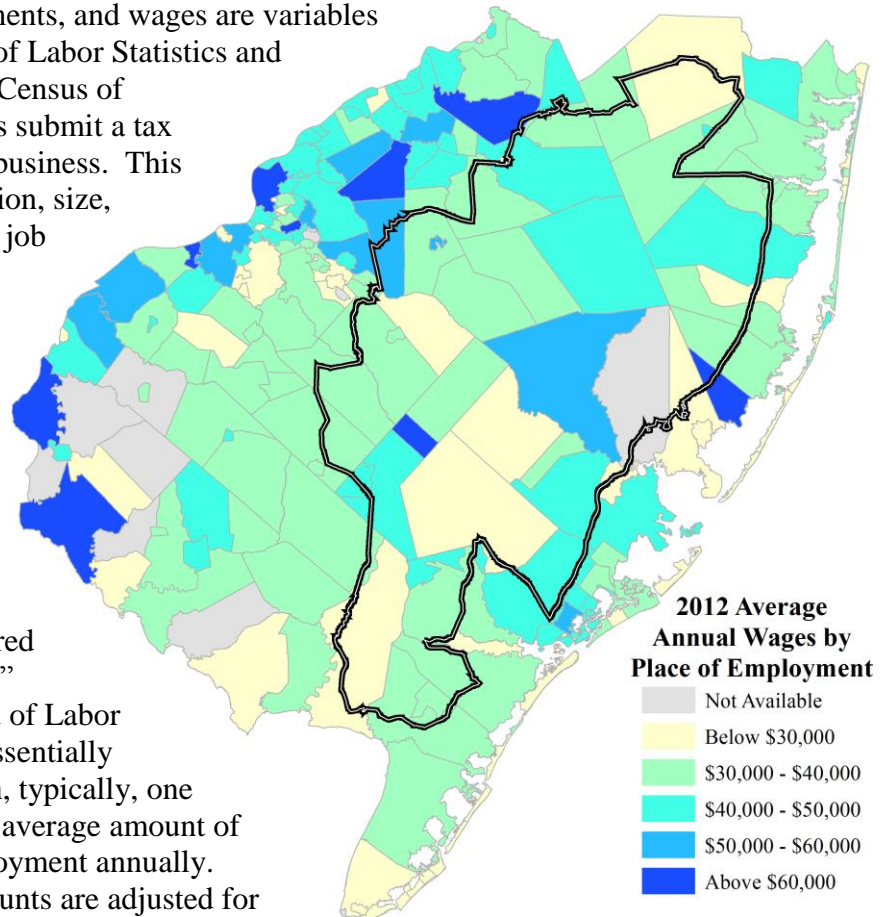
## Employment, Establishments, Wages

N.J. Department of Labor 2004 – 2012  
ESRI 2012

Employment statewide increased in 2012, with the Pinelands gaining 0.9%. The number of Pinelands establishments fell by 3.2%, while wages fell 0.2% (the least among the rest of the state).

**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. Block group data is available for 2012 via ESRI data. 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 2012 dollars.



**Findings:** With 20,288 people employed, public administration makes up the greatest percentage of all job sectors (15.3%) in the Pinelands. Conversely, retail trade comprised the largest percentage in the Non-Pinelands and the state (14.5% and 13.4%, respectively). Health care and social assistance make up the second largest sector for all three regions (14.4% in the Pinelands, 13.7% in the Non-Pinelands, and 12.7% in the state). The top four sectors in terms of employment account for 54.3% of the Pinelands total employed workers. In the Non-Pinelands, 46.9% of the total people employed work in the largest four sectors and in the state as a whole that figure is 42.4%. This is noteworthy because it shows the Pinelands have less employment diversity than other parts of the state.

Amongst particular industries of interest to the Pinelands, agriculture, forestry, fishing and hunting make up 0.5% of total employment in the Pinelands whereas in the Non-Pinelands and the state, it makes up 0.2% and 0.1%, respectively. Mining comprises 0.1% of Pinelands employment, while the percentage is less than 0.05% in the Non-Pinelands and the state. Job sectors that typically require greater amounts of higher education are lower in the Pinelands than anywhere else. For example, professional, scientific, and

technical services make up 3.2% in the Pinelands while in the Non-Pinelands and the state, the sector comprises 5.6% and 7.1% of employment, respectively.

### 2012 Employment by NAICS Sector

Based on ESRI block group data

NAICS Sector	Pinelands		Non-Pinelands		State	
	Total	% of Total	Total	% of Total	Total	% of Total
11-99 Total	132,978	100.0%	1,012,138	100.0%	4,551,649	100.0%
11 Agriculture/Forestry/Fishing/Hunting	612	0.5%	1,913	0.2%	5,288	0.1%
21 Mining	143	0.1%	278	0.0%	2,162	0.0%
22 Utilities	836	0.6%	2,827	0.3%	16,796	0.4%
23 Construction	9,134	6.9%	51,841	5.1%	219,814	4.8%
31-33 Manufacturing	4,561	3.4%	58,641	5.8%	334,939	7.4%
42 Wholesale Trade	4,637	3.5%	38,063	3.8%	219,580	4.8%
44-45 Retail Trade	16,904	12.7%	146,777	14.5%	611,984	13.4%
48-49 Transportation/Warehousing	4,278	3.2%	24,078	2.4%	139,037	3.1%
51 Information	1,346	1.0%	16,538	1.6%	122,242	2.7%
52 Finance/Insurance	2,303	1.7%	27,437	2.7%	205,784	4.5%
53 Real Estate/Rental/Leasing	2,544	1.9%	30,405	3.0%	143,631	3.2%
54 Professional/Scientific/Technical Svcs	4,263	3.2%	57,048	5.6%	325,175	7.1%
55 Management of Companies & Enterprises	28	0.0%	946	0.1%	6,084	0.1%
56 Admin/Support/Waste Mgmt/Remediation	3,848	2.9%	26,727	2.6%	154,947	3.4%
61 Educational Services	15,837	11.9%	94,886	9.4%	388,960	8.5%
62 Health Care & Social Assistance	19,183	14.4%	138,644	13.7%	579,791	12.7%
71 Arts, Entertainment, and Recreation	5,342	4.0%	72,769	7.2%	128,874	2.8%
72 Accommodation/Food Services	9,134	6.9%	94,365	9.3%	348,348	7.7%
81 Other Services Except Public Admin	6,584	5.0%	52,055	5.1%	248,736	5.5%
92 Public Admin	20,288	15.3%	68,763	6.8%	307,262	6.8%
99 Unclassified Establishments	1,173	0.9%	7,137	0.7%	42,215	0.9%

#### Employment

From 2004 onward, employment levels (those employees who are insured for unemployment) in the Pinelands have hovered around the 200,000 mark. Employment rose until 2006 to 211,195 (up 4.8% from 2004). In 2007, the national recession took hold and the Pinelands and Non-Pinelands began losing jobs. The state overall (primarily in northern New Jersey) saw a 0.4% increase in 2007, but over the next few years, employment declined across the entire state. In the Pinelands and the Non-Pinelands, employment reached their lowest numbers in 2011, showing declines from 2004 of 2.8% and 4.4%, respectively. The state overall reached its bottom point one year earlier in 2010, with a 4.2% decline from 2004. In 2012, employment levels again began to rise in the Pinelands, where employment hit 197,660 (still 1.9% lower than 2004 levels and 6.4% lower than the 2006 high). The Non-Pinelands and the state did slightly worse than the Pinelands as employment levels were below 2004 levels by 3.2% in the Non-Pinelands and 2.8% lower for the state.

#### Private Sector Employment by Municipal Aggregate

Region	2008	2009	2010	2011	2012	5 Year Change
Pinelands	207,671	198,434	196,258	195,909	197,660	-4.8%
Non-Pinelands	549,651	529,051	524,146	522,952	529,074	-3.7%
State	3,265,584	3,127,499	3,107,176	3,128,003	3,151,628	-3.5%

Available municipal employment figures for employees covered by unemployment insurance have shown much greater variability than for the region. Possible explanations for the extreme changes could include data suppression, which may cause employment numbers to vary. An additional investigation is likely necessary to determine continued use on a municipal scale.

Employment in Port Republic City (those employees who are insured for unemployment) grew 97.4% from 2011 (a gain of 34 jobs). Evesham Township gained the most employment in absolute terms,

increasing employment by 672 (3.0% growth) from 2011. In the bottom portion, Tabernacle Township lost 24.9%, which is the second most in absolute terms (a loss of 229). The most jobs lost occurred in Berlin Township, where employment declined by 5.6%. This translates to a loss of 275 jobs (the most among Pinelands municipalities).

### *Establishments*<sup>14</sup>

Establishments in the Pinelands and across the state have experienced an overall decline since 2004. The number of establishments in the Pinelands and the state overall grew until 2006 when both peaked (the Non-Pinelands peaked in 2007). Since then, the number of establishments fluctuated while experiencing an overall decline. In 2006, the Pinelands had 6.3% more establishments than in 2004. The state, likewise, had 2.9% more while the Non-Pinelands, during its peak in 2007, had 2.5% more establishments. In 2007, the Pinelands experienced a 2.1% decrease in establishments before gaining back 1.0% the following year; from then on, establishments continued to decline. In 2011, establishments in the Pinelands fell to the levels seen in 2004 while the state and Non-Pinelands were already below their 2004 levels. Despite the Pinelands' early ability to hold onto more of its gained establishments (percentage-wise) than the rest of the state, it has now "caught up," with 17,374 establishments in 2012 (3.2% lower than 2004 levels and 8.9% lower than its 2006 peak). The Non-Pinelands have 36,236 establishments, which is 2.9% lower than 2004 and 5.3% lower than its 2007 peak. New Jersey as a whole has 250,156 establishments, which is 3.0% lower than 2004 and 5.7% lower than its 2006 peak.

**Regional Private Sector Establishments by Municipal Aggregate**

Region	2008	2009	2010	2011	2012	5 Year Change
Pinelands	18,857	18,465	18,398	17,955	17,374	-7.9%
Non-Pinelands	37,713	37,423	37,635	36,944	36,236	-3.9%
State	262,657	258,449	259,893	257,415	250,156	-4.8%

At the municipal level, 16 of the 47 Pinelands Municipalities gained establishments from 2004 to 2012. Jackson Township saw the most gains by adding 333 establishments during the nine-year period (a 58.9% increase). New Hanover Township also saw gains greater than 50%, adding 49 establishments.

Of those losing establishments, Evesham Township, Upper Township, and Waterford Township had losses of more than 100 (losses of 104, 162, and 250, respectively). The highest loss percentage-wise took place in Woodland Township, where 58 establishments were lost (-68.2%).

More recently, only four municipalities actually gained establishments in 2012. Woodbine Borough added the most, with five establishments (a 6.6% gain). Chesilhurst Borough had the highest percentage growth at 7.7% (one new establishment in 2012). Only Manchester Township and Eagleswood Township neither gained, nor lost, any establishments. The remaining 40 municipalities lost between one and 46 establishments. Twenty-seven lost less than 10 establishments while 14 of those only lost five or less. The biggest losses of 42 and 46 were Medford Township (down 5.2%) and Evesham Township (down 3.2%), respectively.

### *Wages*

In 2004, average annual wages in the Pinelands and the Non-Pinelands were about \$40,000 before a four-year slide to just over \$38,000. The state, influenced by northern New Jersey, saw a 0.3% uptick in 2007 before continuing its own slide in 2008. The year 2009 marked a 1.1% rise for the Pinelands, while the rest of the state (including north New Jersey) continued to fall. During the next year, in 2010, all regions saw some growth in their average annual wages (between 0.5% and 0.8%), but then fell the following years.

<sup>14</sup> Due to data suppression, Bass River Township and Washington Township are not fully represented in the *Establishments* narrative. Please see Table E3b for details.



Relative to 2004, 2012 average annual wages decreased across the state by at least 3%. Average annual wages decreased the least in the Pinelands, dropping only 3.7%. Average annual wages fell 6.7% in the Non-Pinelands and by 5.2% state-wide. Despite fairing somewhat better than the rest of the state in relative terms, the Pinelands' average annual wage is still much lower than the state's (\$38,140 and \$46,029, respectively), yet slightly higher than that of the Non-Pinelands (\$37,326).

From 2004 to 2012, 12 Pinelands municipalities saw an overall increase in average annual wages. Chesilhurst saw the largest absolute and percentage increase with a gain of \$21,735 and 131.4%, respectively. The only other gains over \$10,000 were Weymouth Township (\$15,079, 50.8%) and Folsom Borough (\$14,785, 26.3%). Folsom Borough also features the highest average annual wage at \$70,947.

**Regional Private Sector Average Annual Wages by Municipal Aggregate**

<b>Region</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>5 Year Change</b>
Pinelands	\$38,378	\$38,809	\$39,086	\$38,233	\$38,140	-0.6%
Non-Pinelands	\$38,284	\$38,118	\$38,424	\$37,518	\$37,326	-2.5%
State	\$47,320	\$47,020	\$47,288	\$46,488	\$46,029	-2.7%

Of the 34 municipalities that saw decreases in average annual wages, Medford Lakes Borough suffered the worst by decreasing \$15,326. Despite this, the municipality still has the fourth highest average annual wage of the Pinelands municipalities. Three other municipalities sustained losses during the time period greater than \$10,000 (though all three losses were less than \$11,000): Washington Township, Shamong Township, and South Toms River Borough.

In just 2012, 17 municipalities saw gains in average annual wages. Eagleswood grew by 22.5% to \$64,298 (the greatest percentage and absolute one-year change), while Washington Township and Weymouth Township also saw gains greater than \$5,000. Of the 29 municipalities decreasing, 17 of those were decreases of less than \$1,000, with one less than \$100. The greatest absolute and percentage decreases occurred in Mullica Township; a decline of \$4,567 and 14.7%, respectively. Mullica Township also has the 45th lowest average annual wage at \$26,588, making the recent loss significant. Woodbine Borough, Port Republic City, Chesilhurst Borough, and Waterford Township all saw decreases greater than \$2,000 in 2012.

Table E3a

## Employment

Municipality	County	2008	2009	2010	2011	2012	5 Year Change
Evesham Township	Burlington	23,621	23,114	22,971	22,647	23,319	-1.3%
Egg Harbor Township	Atlantic	11,425	10,624	10,921	11,679	11,813	3.4%
Jackson Township	Ocean	8,101	7,971	8,445	8,474	8,811	8.8%
Galloway Township	Atlantic	8,062	7,757	7,853	7,661	7,819	-3.0%
Hammonton Town	Atlantic	8,108	7,244	7,066	7,217	7,539	-7.0%
Stafford Township	Ocean	7,568	7,464	7,230	7,304	7,403	-2.2%
Hamilton Township	Atlantic	8,207	7,404	7,276	7,383	7,208	-12.2%
Medford Township	Burlington	7,172	6,808	6,244	6,148	6,278	-12.5%
Monroe Township	Gloucester	5,992	5,395	5,432	5,397	5,518	-7.9%
Winslow Township	Camden	5,175	4,729	4,914	4,967	5,270	1.8%
Lacey Township	Ocean	4,901	4,779	4,999	4,805	5,099	4.0%
Berlin Township	Camden	5,185	4,892	4,858	4,922	4,647	-10.4%
Manchester Township	Ocean	3,676	3,808	3,771	3,672	3,637	-1.1%
Berkeley Township	Ocean	3,433	3,259	3,183	3,181	3,109	-9.4%
Egg Harbor City	Atlantic	2,974	2,988	2,566	2,524	2,521	-15.2%
Upper Township	Cape May	2,587	2,545	2,525	2,513	2,374	-8.2%
Pemberton Township	Burlington	2,630	2,373	2,274	2,418	2,374	-9.7%
Southampton Township	Burlington	2,331	2,178	2,075	2,156	2,194	-5.9%
Waterford Township	Camden	2,619	2,270	1,942	1,716	1,886	-28.0%
Barnegat Township	Ocean	1,651	1,435	1,495	1,564	1,623	-1.7%
Little Egg Harbor Township	Ocean	1,659	1,559	1,540	1,585	1,607	-3.1%
Franklin Township	Gloucester	1,777	1,731	1,592	1,497	1,542	-13.2%
Dennis Township	Cape May	1,654	1,625	1,602	1,629	1,488	-10.0%
New Hanover Township	Burlington	1,591	1,665	1,617	1,485	1,432	-10.0%
Buena Vista Township	Atlantic	1,260	1,113	1,062	964	930	-26.2%
Ocean Township	Ocean	873	890	849	941	929	6.4%
Shamong Township	Burlington	866	784	787	813	832	-3.9%
Lakehurst Borough	Ocean	782	788	798	804	765	-2.2%
Eagleswood Township	Ocean	937	865	788	705	728	-22.3%
Plumsted Township	Ocean	744	694	665	696	721	-3.1%
Buena Borough	Atlantic	955	812	712	706	715	-25.1%
Folsom Borough	Atlantic	831	809	772	797	711	-14.5%
Tabernacle Township	Burlington	794	733	961	922	693	-12.7%
Beachwood Borough	Ocean	684	634	569	596	595	-13.0%
Wrightstown Borough	Burlington	646	592	608	614	591	-8.6%
Woodbine Borough	Cape May	633	558	554	516	517	-18.4%
South Toms River Borough	Ocean	449	354	379	436	427	-4.9%
Medford Lakes Borough	Burlington	-	405	367	436	403	0% <sup>15</sup>
Woodland Township	Burlington	359	321	336	278	282	-21.5%
Maurice River Township	Cumberland	267	203	197	202	214	-19.7%
Mullica Township	Atlantic	295	198	173	153	132	-55.4%
Estell Manor City	Atlantic	146	130	138	133	129	-11.8%
Weymouth Township	Atlantic	121	133	140	126	124	2.1%
Chesilhurst Borough	Camden	155	-	-	95	97	-37.2%
Port Republic City	Atlantic	55	43	43	35	70	26.8%
Washington Township	Burlington	-	-	72	56	49	-64.5% <sup>15</sup>
Bass River Township	Burlington	-	-	-	-	-	-
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	33,436	31,747	31,475	31,066	31,324	-6.3%
Vineland City	Cumberland	25,404	25,255	24,679	24,496	24,388	-4.0%
Berlin Borough	Camden	4,008	4,016	4,080	4,165	4,124	2.9%
North Hanover Township	Burlington	405	381	372	327	353	-12.9%
Springfield Township	Burlington	416	318	248	253	268	-35.6%
Corbin City	Atlantic	51	44	49	36	41	-19.0%

<sup>15</sup> Due to suppressed data for Medford Lakes Borough and Washington Township, the percent change is representative of the years 2009 – 2012 and 2007 – 2012, respectively.

Table E3b

## Establishments

Municipality	County	2008	2009	2010	2011	2012	5 Year Change
Evesham Township	Burlington	1,558	1,526	1,493	1,435	1,389	-10.8%
Jackson Township	Ocean	808	768	833	907	898	11.1%
Egg Harbor Township	Atlantic	907	893	889	887	863	-4.9%
Medford Township	Burlington	861	844	831	811	769	-10.7%
Stafford Township	Ocean	682	670	656	638	630	-7.6%
Monroe Township	Gloucester	625	615	615	614	598	-4.3%
Winslow Township	Camden	612	614	635	622	597	-2.5%
Hammonton Town	Atlantic	648	630	622	620	586	-9.6%
Lacey Township	Ocean	603	573	563	551	537	-10.9%
Hamilton Township	Atlantic	591	567	557	547	531	-10.2%
Galloway Township	Atlantic	515	536	552	524	502	-2.5%
Berlin Township	Camden	402	391	389	383	371	-7.7%
Berkeley Township	Ocean	406	388	392	389	368	-9.4%
Manchester Township	Ocean	289	280	295	294	294	1.7%
Upper Township	Cape May	332	327	315	296	288	-13.3%
Barneget Township	Ocean	242	239	251	253	255	5.4%
Southampton Township	Burlington	278	265	256	247	240	-13.7%
Waterford Township	Camden	400	401	352	260	234	-41.5%
Franklin Township	Gloucester	249	240	239	236	224	-10.0%
Egg Harbor City	Atlantic	234	243	241	225	223	-4.7%
Little Egg Harbor Township	Ocean	238	226	223	219	212	-10.9%
Pemberton Township	Burlington	216	212	217	211	202	-6.5%
Dennis Township	Cape May	200	187	182	187	182	-9.0%
Tabernacle Township	Burlington	175	166	164	153	148	-15.4%
New Hanover Township	Burlington	98	102	127	135	137	39.8%
Plumsted Township	Ocean	146	138	137	132	126	-13.7%
Shamong Township	Burlington	129	131	126	125	120	-7.0%
Ocean Township	Ocean	120	119	118	113	104	-13.3%
Beachwood Borough	Ocean	130	117	112	104	102	-21.5%
Buena Borough	Atlantic	93	94	92	99	91	-2.2%
Lakehurst Borough	Ocean	106	101	98	96	91	-14.2%
Eagleswood Township	Ocean	79	81	84	87	87	10.1%
Woodbine Borough	Cape May	90	83	80	76	81	-10.0%
Buena Vista Township	Atlantic	107	104	100	82	74	-30.8%
Wrightstown Borough	Burlington	68	68	68	74	72	5.9%
Medford Lakes Borough	Burlington	-	67	69	74	65	-3.0% <sup>16</sup>
South Toms River Borough	Ocean	56	50	58	62	59	5.4%
Folsom Borough	Atlantic	53	49	45	41	39	-26.4%
Estell Manor City	Atlantic	34	34	36	34	31	-8.8%
Mullica Township	Atlantic	36	34	31	32	30	-16.7%
Maurice River Township	Cumberland	39	32	30	28	27	-30.8%
Woodland Township	Burlington	82	84	65	33	27	-67.1%
Weymouth Township	Atlantic	26	25	27	25	23	-11.5%
Washington Township	Burlington	-	-	22	24	17	-41.4% <sup>16</sup>
Chesilhurst Borough	Camden	20	-	-	13	14	-30.0%
Port Republic City	Atlantic	17	15	16	15	13	-23.5%
Bass River Township	Burlington	-	-	-	-	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	2,972	2,911	2,872	2,782	2,737	-7.9%
Vineland City	Cumberland	1,746	1,697	1,690	1,660	1,587	-9.1%
Berlin Borough	Camden	385	385	392	377	361	-6.2%
North Hanover Township	Burlington	82	75	72	59	63	-23.2%
Springfield Township	Burlington	60	58	58	53	44	-26.7%
Corbin City	Atlantic	12	10	11	11	11	-8.3%

<sup>16</sup> Due to suppressed data for Medford Lakes Borough and Washington Township, the percent change is representative of the years 2009 – 2012 and 2007 – 2012, respectively.

Table E3c

## Average Annual Wages

Municipality	County	2008	2009	2010	2011	2012	5 Year Change
Folsom Borough	Atlantic	\$70,307	\$72,791	\$73,510	\$69,290	\$70,947	0.9%
Eagleswood Township	Ocean	\$49,732	\$60,313	\$55,153	\$52,477	\$64,298	29.3%
Evesham Township	Burlington	\$55,993	\$55,662	\$55,584	\$54,392	\$52,940	-5.5%
Medford Lakes Borough	Burlington	-	\$61,320	\$62,913	\$52,343	\$52,056	-15.1% <sup>17</sup>
Washington Township	Burlington	-	-	\$49,085	\$42,335	\$50,524	-21.0% <sup>17</sup>
Pemberton Township	Burlington	\$48,571	\$45,892	\$45,715	\$48,061	\$46,392	-4.5%
Lakehurst Borough	Ocean	\$42,209	\$46,326	\$46,852	\$46,457	\$46,321	9.7%
Egg Harbor Township	Atlantic	\$44,650	\$44,757	\$45,102	\$45,794	\$45,555	2.0%
Weymouth Township	Atlantic	\$28,282	\$42,278	\$42,786	\$38,282	\$44,768	58.3%
Buena Borough	Atlantic	\$48,642	\$44,041	\$44,199	\$42,589	\$43,869	-9.8%
Buena Vista Township	Atlantic	\$45,400	\$44,564	\$45,341	\$43,073	\$42,119	-7.2%
Woodland Township	Burlington	\$37,099	\$34,431	\$45,435	\$42,357	\$41,968	13.1%
Lacey Township	Ocean	\$45,030	\$42,048	\$44,130	\$43,272	\$41,849	-7.1%
Galloway Township	Atlantic	\$41,775	\$40,998	\$41,148	\$41,959	\$40,639	-2.7%
New Hanover Township	Burlington	\$38,304	\$40,104	\$38,011	\$37,291	\$39,920	4.2%
Chesilhurst Borough	Camden	\$35,364	-	-	\$40,875	\$38,274	8.2%
Woodbine Borough	Cape May	\$40,604	\$39,158	\$39,927	\$40,597	\$38,273	-5.7%
Berlin Township	Camden	\$41,238	\$37,392	\$39,282	\$37,034	\$37,743	-8.5%
Hammonton Town	Atlantic	\$37,580	\$37,295	\$37,716	\$38,332	\$37,433	-0.4%
Upper Township	Cape May	\$39,805	\$39,175	\$41,200	\$37,217	\$37,154	-6.7%
Medford Township	Burlington	\$38,265	\$38,685	\$39,025	\$37,779	\$37,055	-3.2%
Shamong Township	Burlington	\$45,580	\$40,933	\$39,538	\$37,347	\$36,525	-19.9%
Franklin Township	Gloucester	\$35,109	\$36,630	\$36,801	\$37,262	\$36,516	4.0%
Southampton Township	Burlington	\$39,823	\$36,628	\$37,700	\$37,021	\$36,236	-9.0%
Barnegat Township	Ocean	\$28,245	\$29,124	\$32,109	\$31,529	\$35,557	25.9%
Dennis Township	Cape May	\$36,805	\$35,716	\$36,606	\$34,062	\$35,229	-4.3%
Monroe Township	Gloucester	\$34,225	\$34,479	\$35,061	\$36,684	\$34,922	2.0%
Estell Manor City	Atlantic	\$36,754	\$39,456	\$38,529	\$36,266	\$34,917	-5.0%
Stafford Township	Ocean	\$34,033	\$34,786	\$34,125	\$33,865	\$34,077	0.1%
Beachwood Borough	Ocean	\$34,491	\$35,542	\$36,554	\$33,975	\$33,141	-3.9%
Winslow Township	Camden	\$37,371	\$34,319	\$32,272	\$31,100	\$32,865	-12.1%
South Toms River Borough	Ocean	\$34,519	\$39,250	\$38,196	\$33,336	\$32,812	-4.9%
Manchester Township	Ocean	\$33,453	\$34,128	\$32,097	\$32,136	\$32,808	-1.9%
Berkeley Township	Ocean	\$32,793	\$33,158	\$33,423	\$32,418	\$32,640	-0.5%
Egg Harbor City	Atlantic	\$36,145	\$37,347	\$36,199	\$33,530	\$32,450	-10.2%
Wrightstown Borough	Burlington	\$33,859	\$32,140	\$33,726	\$32,060	\$31,604	-6.7%
Tabernacle Township	Burlington	\$35,077	\$35,184	\$31,168	\$30,286	\$31,335	-10.7%
Plumsted Township	Ocean	\$31,119	\$28,553	\$29,793	\$29,708	\$30,847	-0.9%
Waterford Township	Camden	\$33,354	\$32,860	\$33,740	\$33,051	\$29,428	-11.8%
Ocean Township	Ocean	\$30,708	\$29,588	\$27,303	\$27,000	\$29,253	-4.7%
Little Egg Harbor Township	Ocean	\$28,337	\$28,654	\$28,745	\$29,047	\$28,756	1.5%
Hamilton Township	Atlantic	\$29,820	\$29,238	\$29,145	\$28,908	\$28,600	-4.1%
Jackson Township	Ocean	\$30,313	\$29,282	\$28,976	\$28,616	\$28,442	-6.2%
Maurice River Township	Cumberland	\$36,052	\$29,795	\$28,562	\$27,867	\$28,044	-22.2%
Mullica Township	Atlantic	\$36,853	\$31,609	\$30,061	\$31,155	\$26,588	-27.9%
Port Republic City	Atlantic	\$22,123	\$22,699	\$20,696	\$21,647	\$19,300	-12.8%
Bass River Township	Burlington	-	-	-	-	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	\$55,119	\$48,472	\$51,417	\$71,017	\$61,572	11.7%
North Hanover Township	Burlington	\$44,335	\$49,830	\$48,441	\$46,245	\$43,057	-2.9%
Vineland City	Cumberland	\$41,573	\$41,631	\$41,544	\$40,407	\$39,394	-5.2%
Toms River Township	Ocean	\$39,438	\$40,728	\$40,457	\$39,584	\$39,224	-0.5%
Berlin Borough	Camden	\$41,657	\$39,995	\$38,639	\$38,120	\$38,761	-7.0%
Corbin City	Atlantic	\$20,968	\$21,488	\$19,637	\$21,053	\$18,271	-12.9%

<sup>17</sup> Due to suppressed data for Medford Lakes Borough and Washington Township, the percent change is representative of the years 2009 – 2012 and 2007 – 2012, respectively.

# E4

## Retail Sales, Establishments

U.S. Census Bureau 1997, 2002, 2007

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

Region	1997 Per Capita Sales	2002 Per Capita Sales	2007 Per Capita Sales	5 Year Change 2002 - 2007	10 Year Change 1997 - 2007
State	\$12,818	\$13,766	\$14,383	4.5%	12.2%
Pinelands	\$9,655	\$11,211	\$11,794	5.2%	22.2%
Non-Pinelands	\$14,390	\$14,628	\$15,244	4.2%	5.9%

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

Please note, while reviewing this section, that the data here is both pre-recession and pre-Hurricane Sandy. Both of these events have had economic impacts on the entire state that will not be reflected until later versions of the census are released. The next economic census begins its release schedule in 2014.

**Unit of Analysis:** Retail sales data are obtained at three geographic scales: state, county, and economic place. According to the U.S. Census Bureau (2012), an economic place has a population of at least 5,000 and at least 5,000 jobs.<sup>18</sup> 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 analyzed<sup>19</sup>. Sales data for the state and each county/place is analyzed on a per capita basis. All dollar amounts have been adjusted for inflation to 2007 dollars.<sup>20</sup>

**Findings:** Per capita retail trade figures have mostly shown growth over the ten-year period between 1997 and 2007. The Pinelands in particular have shown the greatest amount of growth at 22.2% compared with the next highest, the state, at 12.2%. Meanwhile, the Non-Pinelands grew the least at 5.9%.

In the shorter term, from 2002 to 2007 the Pinelands again grew the greatest amount at 5.2%, with the state showing the next highest growth at 4.5%. The Non-Pinelands grew at 4.2% while southern New Jersey as a whole actually showed a *decrease* of 1.6%. This decrease is likely indicative of the areas in southern New Jersey that do not qualify as economic places. In 2007 the number of retail establishments in the Pinelands reached 1,960 (1 establishment for every 330 people) while the Non-Pinelands have 6,283 establishments (1 store for every 246 people). This is a 12.5% growth in the number of Pinelands retail establishments and a 2.8% decrease in the number of Non-Pinelands retail establishments.

At the county level, Cape May County showed the most growth over the ten-year period between 1997 and 2007 at 28.0%. However, most of this growth took place between the first half of the period from 1997 to 2002, when per capita sales increased just under \$3,000 as opposed to a per capita increase of

<sup>18</sup> 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.

<sup>19</sup> 23 Pinelands municipalities were considered economic places in 2002 and 32 were considered economic places in 2007.

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

\$549 between 2002 and 2007. Gloucester and Atlantic Counties had the next highest growth at 19.5% and 18.4%, respectively.

County	1997 Per Capita Sales	2002 Per Capita Sales	2007 Per Capita Sales	5 Year Change 2002 - 2007	10 Year Change 1997 - 2007
Atlantic	\$13,744	\$14,717	\$16,266	10.5%	18.4%
Burlington	\$13,578	\$19,994	\$15,652	-21.7%	15.3%
Camden	\$11,807	\$10,887	\$11,410	4.8%	-3.4%
Cape May	\$12,678	\$15,675	\$16,224	3.5%	28.0%
Cumberland	\$11,242	\$11,884	\$12,640	6.4%	12.4%
Gloucester	\$12,826	\$14,517	\$15,321	5.5%	19.5%
Ocean	\$12,662	\$12,416	\$12,925	4.1%	2.1%
Salem	\$7,946	\$9,710	\$10,164	4.7%	27.9%

Camden County, while showing growth of 4.8% from 2002 to 2007, actually declined 3.4% over the full ten years. This decline represents a difference of \$349 per capita between 1997 and 2007. Unlike Camden County (which is slightly down despite recent growth), Burlington County has shown growth over the full ten years while exhibiting a more recent decline. Burlington County's per capita sales from 1997 to 2002 increased by \$6,417 (47.3%) and then proceeded to drop \$4,343 (21.7%) the following five years.

County	1997 Establishments	2002 Establishments	2007 Establishments	5 Year Change 2002 - 2007	10 Year Change 1997 - 2007
Atlantic	1,258	1,182	1,291	9.2%	2.6%
Burlington	1,570	1,555	1,594	2.5%	1.5%
Camden	2,052	1,959	1,911	-2.5%	-6.9%
Cape May	784	772	746	-3.4%	-4.8%
Cumberland	578	553	564	2.0%	-2.4%
Gloucester	989	965	989	2.5%	0.0%
Ocean	1,923	1,978	1,984	0.3%	3.2%
Salem	226	216	197	-8.8%	-12.8%

The number of establishments in 5 of the 8 southern New Jersey counties increased from 2002 to 2007. Atlantic County saw the greatest gains of 9.2%. Gloucester and Burlington Counties each saw gains of 2.5% (the next greatest percent increase). Cape May County lost 3.4% of their establishments while Salem County, the only southern county without any land in the Pinelands, saw the greatest decline of 8.8%.

# E5

## Assessed Farmland Acreage

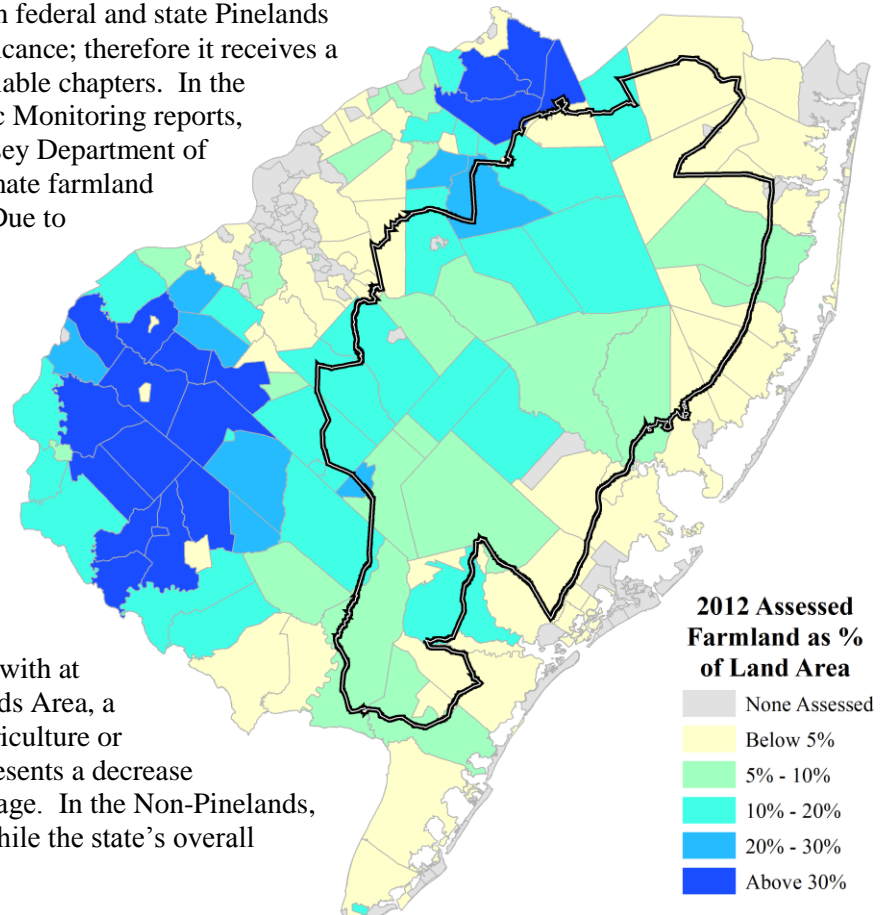
N.J. Department of the Treasury, Division of Taxation 2009 – 2012

After experiencing a slight increase in assessed farmland acreage in 2010, the Pinelands farmland slipped down 3.4% in 2011 and 0.4% in 2012. In 2012, assessed farmland in the Pinelands totaled 174,254 acres.

**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:** Farmland assessment data is compiled at the municipal level and aggregated to examine the Pinelands and county totals.

**Findings:** Among just the municipalities with at least 10% of their land area in the Pinelands Area, a total of 174,254 acres were devoted to agriculture or horticulture use in 2012. This figure represents a decrease 0.3% from 2009's assessed farmland acreage. In the Non-Pinelands, assessed farmland acreage fell by 3.0% while the state's overall assessed farmland acreage fell by 2.3%.



From 2011 to 2012, the Non-Pinelands actually saw an increase of 1.3% to 287,216 acres. The Pinelands and the state both saw their 2012 assessed acreages decrease by 0.4% and 0.7%, respectively. The total 2012 farmland assessed acreage in New Jersey is 975,895.

When investigated at the municipal level, Southampton Township (with 12,654 assessed farmland acres in 2012) has more assessed farmland acreage than any other Pinelands municipality. Woodland Township boasts the next highest at 11,371 acres, while Egg Harbor City, Medford Lakes Borough, Chesilhurst Borough, Beachwood Borough, Lakehurst Borough, and South Toms River Borough do not have any acreage of assessed farmland. The largest absolute gains from 2009 to 2012 were seen in Woodland Township, with an increase of 9,636 acres to a total of 11,371 acres (tax assessment data suggest that such a significant change may be due to an increase in the number of FA-1 forms submitted, thereby increasing the number of acres counted). Tabernacle Township saw the next highest gain of 2,419 acres, for a total of 9,544 acres. On the other end of the spectrum, Franklin Township farmland acreage decreased from 13,844 acres in 2009 to 8,676 acres in 2012 (a decrease of 5,168 acres).

### Pinelands Assessed Farmland Acreage by Year

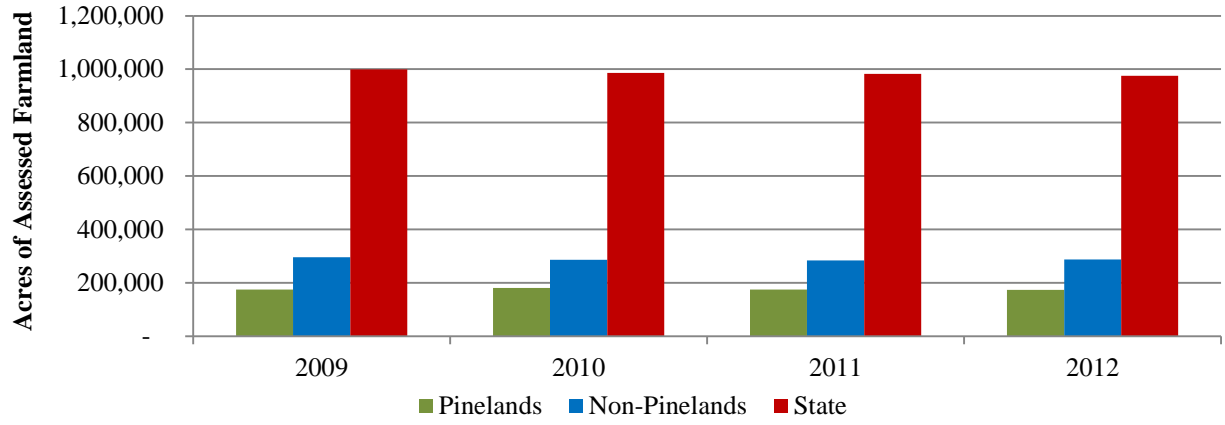




Table E5

## Farmland Assessed Acreage

Municipality	County	2009	2010	2011	2012	Change 2009 - 2012	Percent Change 2009 - 2012
Southampton Township	Burlington	13,835	11,989	12,257	12,654	-1,181	-8.5%
Woodland Township	Burlington	1,735	15,076	11,708	11,371	9,636	555.4%
Pemberton Township	Burlington	10,380	9,003	10,593	9,833	-547	-5.3%
Maurice River Township	Cumberland	9,400	9,276	9,347	9,736	336	3.6%
Estell Manor City	Atlantic	9,540	7,178	9,524	9,647	107	1.1%
Tabernacle Township	Burlington	7,125	9,422	9,836	9,544	2,419	34.0%
Franklin Township	Gloucester	13,844	13,346	13,184	8,676	-5,168	-37.3%
Washington Township	Burlington	8,401	8,192	8,211	8,446	45	0.5%
Bass River Township	Burlington	6,865	6,845	6,949	6,878	13	0.2%
Winslow Township	Camden	7,271	6,952	6,452	6,776	-495	-6.8%
Hammonton Town	Atlantic	6,773	6,823	6,556	6,609	-164	-2.4%
Mullica Township	Atlantic	6,427	6,419	6,429	6,416	-11	-0.2%
Hamilton Township	Atlantic	6,438	6,243	6,379	6,368	-70	-1.1%
Lacey Township	Ocean	6,261	6,266	231	6,295	34	0.5%
Medford Township	Burlington	6,528	6,303	5,974	5,831	-697	-10.7%
Monroe Township	Gloucester	5,834	5,979	6,107	5,348	-486	-8.3%
Plumsted Township	Ocean	5,430	4,994	4,815	5,063	-367	-6.8%
Shamong Township	Burlington	4,982	4,583	4,656	4,456	-526	-10.6%
Jackson Township	Ocean	4,424	4,284	4,432	4,259	-165	-3.7%
Dennis Township	Cape May	3,789	3,870	3,848	3,834	45	1.2%
Manchester Township	Ocean	3,676	3,692	3,820	3,781	105	2.9%
Buena Vista Township	Atlantic	4,009	3,910	4,041	3,641	-368	-9.2%
Waterford Township	Camden	2,593	2,491	2,581	2,565	-28	-1.1%
Galloway Township	Atlantic	2,865	2,782	2,004	2,400	-465	-16.2%
Upper Township	Cape May	2,515	2,170	2,341	2,311	-204	-8.1%
Buena Borough	Atlantic	2,200	2,254	2,339	2,305	105	4.8%
Egg Harbor Township	Atlantic	2,432	2,543	2,484	2,118	-314	-12.9%
Ocean Township	Ocean	2,811	1,848	1,946	1,892	-919	-32.7%
Evesham Township	Burlington	2,570	2,591	2,343	1,354	-1,216	-47.3%
New Hanover Township	Burlington	932	814	602	892	-40	-4.3%
Folsom Borough	Atlantic	754	679	703	721	-33	-4.4%
Little Egg Harbor Township	Ocean	556	537	543	543	-13	-2.3%
Stafford Township	Ocean	442	450	450	450	8	1.8%
Woodbine Borough	Cape May	334	309	317	331	-3	-0.9%
Eagleswood Township	Ocean	270	270	270	287	17	6.3%
Barnegat Township	Ocean	169	192	191	192	23	13.6%
Berlin Township	Camden	173	173	173	157	-16	-9.2%
Port Republic City	Atlantic	148	148	148	147	-1	-0.7%
Berkeley Township	Ocean	88	88	88	88	0	0.0%
Wrightstown Borough	Burlington	24	24	24	24	0	0.0%
Weymouth Township	Atlantic	6	6	9	15	9	150.0%
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>							
North Hanover Township	Burlington	6,784	7,076	6,913	7,234	321	4.6%
Springfield Township	Burlington	11,677	11,679	11,662	11,778	116	1.0%
Toms River Township	Ocean	295	250	284	297	13	4.6%
Berlin Borough	Camden	65	93	93	93	0	0.0%
Corbin City	Atlantic	284	203	184	161	-23	-12.5%
Vineland City	Cumberland	9,801	9,207	9,033	8,727	-306	-3.4%

# E6

## Cranberry & Blueberry Production

U.S.D.A. National Agricultural Statistics Service/  
N.J. Agricultural Statistics Service 1980 - 2012

In 2012, cranberry prices increased by 4.5% to 54¢ per pound and utilized production of cranberries grew by 7.8% to 550,000 barrels. Blueberry prices increased by 1¢ to \$1.57 per pound while utilized production fell by 16.9% to 51,500,000 pounds.

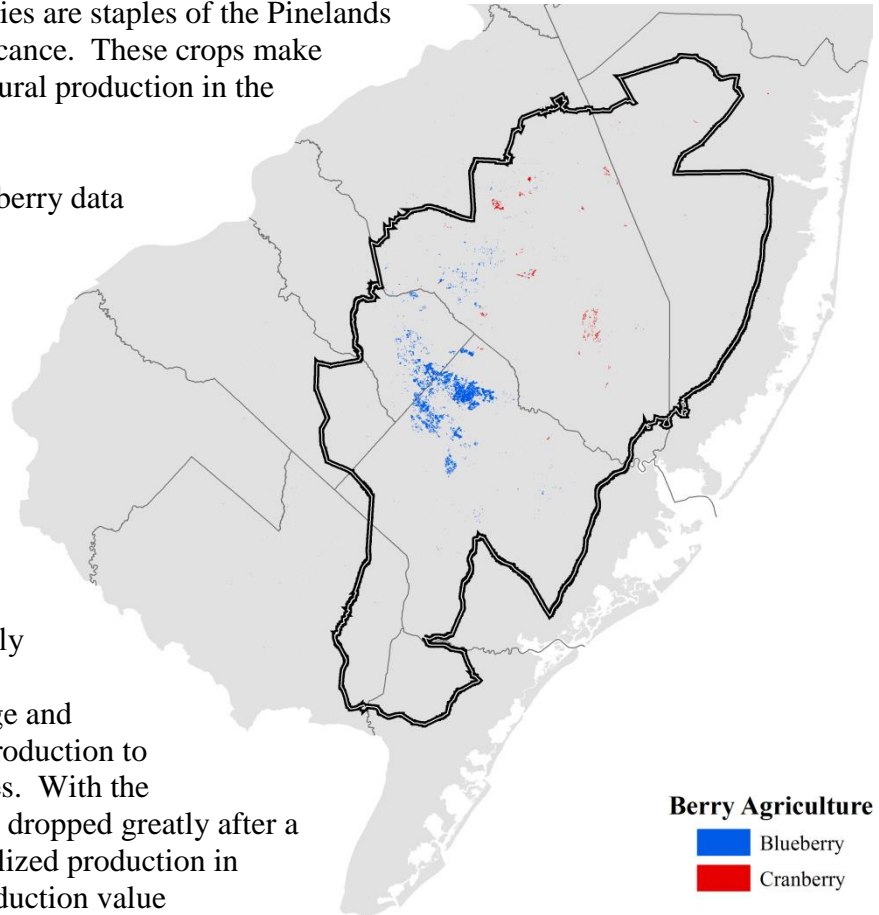
**Description:** Cranberries and blueberries are staples of the Pinelands for their economic and cultural significance. These crops make up a significant amount of the agricultural production in the Pinelands.

**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 2012 dollars.

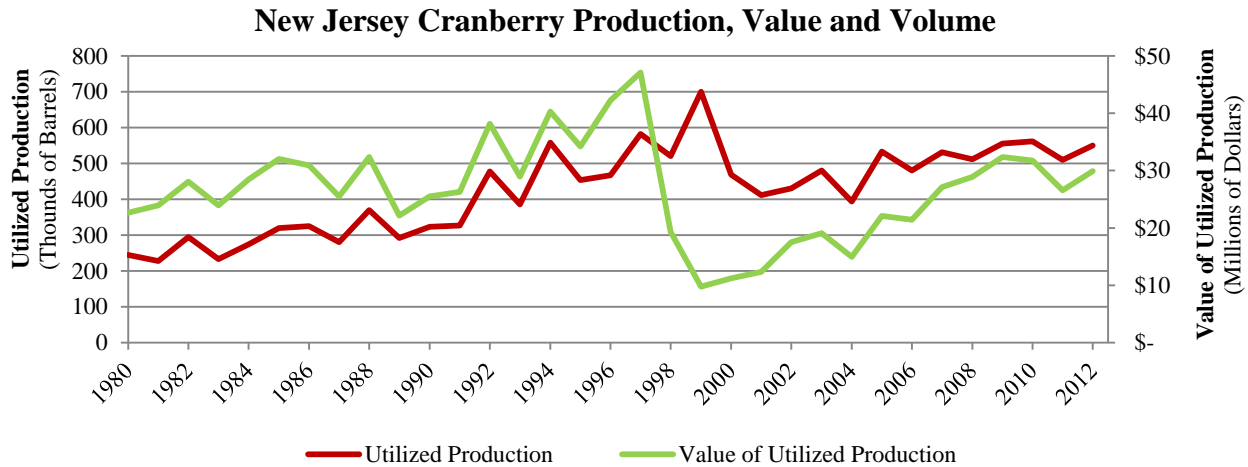
**Findings:** New Jersey cranberry production through the 1980's and early 1990's experienced growth due to advancements in production knowledge and technology. Farmers also increased production to take advantage of high cranberry prices. With the increased supply of cranberries, prices dropped greatly after a brief high of \$47 million dollars of utilized production in 1997. In the following two years, production value plummeted to a low of around \$10 million. Since 1999, production and utilized value is slowly returning to a more stable pattern.

Cranberry prices, in the early 1980's and 1990's, experienced a slow descent, which is likely due to increased production (that is, supply rose and prices dropped in response). Prices fell from 81¢ per pound in 1997 to a low of 14¢ per pound in 1999 (a decrease of 83%). After a slow increase in prices from 1999, prices saw a slight dip in 2011 with a subsequent increase in 2012 to their current levels at 54¢ per pound (291% higher than the 1999 low and 41.2% lower than the price per pound when the Comprehensive Management Plan came into effect in 1980). In 2012, cranberry prices and production grew as cranberry demand rose. Compared to cranberry prices nationally, New Jersey's cranberry prices per pound were 22% higher in 2010 and about 14% higher in 2011 and 2012.

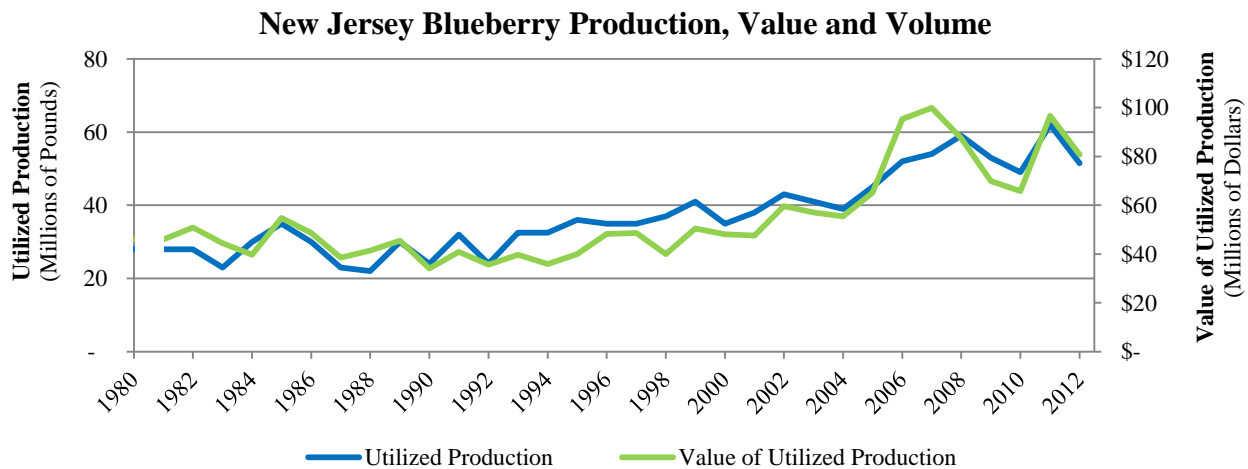
The value of utilized blueberry production in New Jersey showed variation through the 1980's and early 1990's; value of utilized production would often increase one year and fall the next, however it never actually increased beyond \$55 million or decreased below \$35 million. This was the case up until the



mid-1990s, when production and value began steady growth followed by a much more rapid growth in the mid-2000s.



Values of utilized production rose to a high of \$100 million in 2007 while utilized production hit its peak in 2011 to 62 million pounds after a decline in 2009 and 2010. The year 2012 showed drops in production and value despite a slight increase in price per pound. The 52 million pounds of utilized production in 2012 represents a 16.9% drop from the 2011 high. The \$81 million valuation of utilized production in 2012 is 19.1% less than that of 2007’s high mark.



Blueberry prices per pound were stable from 2011 to 2012, with only a 1¢ increase from \$1.56 per pound in 2011 to \$1.57 per pound in 2012; an increase of 0.5%. Unlike cranberry prices, which were fairly stable from year-to-year despite a large decrease in the mid-1990’s, blueberry prices per pound show much greater volatility from year-to-year, often showing spikes of high prices followed by sharp declines in prices. Nationally, blueberry prices per pound showed more volatility in 2012, falling 10.5%. Despite the national drop in blueberry prices, New Jersey blueberry prices per pound were still 7.1% lower than national prices in 2012.

### Cranberry and Blueberry Prices

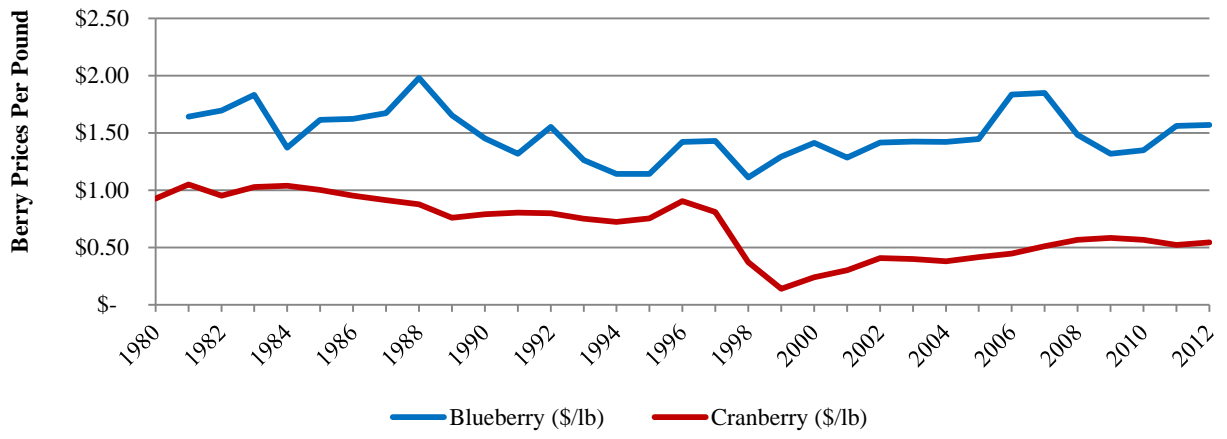


Table E6

## Sales of New Jersey Cranberries and Blueberries

Year	Cranberry		Blueberry	
	Value of Production	Annual % Change	Value of Production	Annual % Change
1980	\$22,664,048	-	-	-
1981	\$23,957,086	5.7%	\$45,971,842	-
1982	\$28,074,707	17.2%	\$50,819,978	10.5%
1983	\$23,955,229	-14.7%	\$44,397,394	-12.6%
1984	\$28,457,281	18.8%	\$39,731,474	-10.5%
1985	\$32,023,669	12.5%	\$54,812,367	38.0%
1986	\$30,909,302	-3.5%	\$48,633,707	-11.3%
1987	\$25,522,122	-17.4%	\$38,507,522	-20.8%
1988	\$32,385,757	26.9%	\$41,435,604	7.6%
1989	\$22,166,930	-31.6%	\$45,474,425	9.7%
1990	\$25,532,891	15.2%	\$34,149,253	-24.9%
1991	\$26,293,739	3.0%	\$40,853,235	19.6%
1992	\$38,171,844	45.2%	\$35,707,349	-12.6%
1993	\$28,947,911	-24.2%	\$39,730,090	11.3%
1994	\$40,284,297	39.2%	\$35,949,587	-9.5%
1995	\$34,198,056	-15.1%	\$39,922,841	11.1%
1996	\$42,232,711	23.5%	\$48,304,002	21.0%
1997	\$47,121,844	11.6%	\$48,608,125	0.6%
1998	\$19,299,982	-59.0%	\$39,946,539	-17.8%
1999	\$9,743,275	-49.5%	\$50,425,237	26.2%
2000	\$11,193,041	14.9%	\$48,132,075	-4.5%
2001	\$12,337,923	10.2%	\$47,617,096	-1.1%
2002	\$17,506,064	41.9%	\$59,714,860	25.4%
2003	\$19,106,214	9.1%	\$57,011,684	-4.5%
2004	\$14,941,234	-21.8%	\$55,459,895	-2.7%
2005	\$22,118,848	48.0%	\$65,210,339	17.6%
2006	\$21,428,773	-3.1%	\$95,345,286	46.2%
2007	\$27,106,093	26.5%	\$99,924,581	4.8%
2008	\$28,937,185	6.8%	\$87,432,187	-12.5%
2009	\$32,370,916	11.9%	\$69,840,188	-20.1%
2010	\$31,775,862	-1.8%	\$65,817,592	-5.8%
2011	\$26,548,264	-16.5%	\$96,659,769	46.9%
2012	\$29,920,000	12.7%	\$80,805,000	-16.4%



# Census of Agriculture

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

According to the 2007 Census of Agriculture, the net cash return per farm in the seven Pinelands counties (\$40,496) was 61.7% higher than the net cash return per farm in the Non-Pinelands County, Salem (\$25,048).

**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. The latest data from the 2012 Census of Agriculture is due out in 2014 and will likely be included in the 2014 Long-Term Economic Monitoring Report.

**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, and 2007.<sup>21</sup>

**Findings:** Total farmland acreage in the Pinelands counties has declined 12.5% from 2002 to 2007, bringing total acreage to 258,882 in 2007. During the ten-year period from 1997 to 2007, however, the decrease was somewhat less, dropping 11.5%. Among the individual counties, Cumberland County saw the only increase in farming acreage from 1997 by increasing 3.4%. Conversely, Gloucester County witnessed a 20.8% decrease during the same period. New Jersey as a whole saw farming acreage decrease by 9% from 2002 to 2007, bringing the state's total 2007 acreage to 733,450. The Non-Pinelands county (Salem) recorded 96,530 acres in 2007 (a 0.3% decrease from 2002).

Interestingly, despite the widespread decrease in farming acreage across the state, the number of individual farms increased. This is happening in conjunction with the shrinking of average farm sizes. In 1997, there were 3,409 farms in the Pinelands counties, with an average of 86 acres each. In 2002, this average size increased to 90 acres. In 2007, the average size decreased to 76 acres. Meanwhile the number of farms increased to 3,386 in 2007. State and Non-Pinelands county totals show a similar trend. The Non-Pinelands county farms increased from 716 in 1997 to 759 in 2007 while size decreased 2.3% to 127 acres in 2007. The total number of farms in the state increased from 10,045 to 10,327 and average size decreased by 16.5% to 71 acres.

In 2007, 51.7% of the agricultural sales in New Jersey came from the Pinelands counties. With the exception of a slight decrease from 1997 to 2002 (1.4%), agricultural sales in the Pinelands counties have been increasing since 2002. Recording 2007 agricultural sales of \$510,118,000, Pinelands county sales have increased almost \$59 million during the ten-year period. Likewise, the Non-Pinelands county had \$79,962,000 in agricultural sales in 2007; a figure that has decreased 9.6% since 1997.

Pinelands counties net cash returns and returns per farm are also higher than the Non-Pinelands county. In 2007, agriculture in the Pinelands counties accounted for 54.6% of the state's agriculture net cash returns. However, despite a 5.2% increase over 1997 returns, most of the Pinelands counties actually saw decreases: Burlington (-39.5%), Camden (-32.4%), Cumberland (-2.7%), Gloucester (-17.9%), and Ocean (-76.1%) all experienced decreased returns. Atlantic and Cape May Counties, on the other hand, saw significant increases of 141.0% and 136.9%, respectively, during the same period. On a per farm basis in 2007, the Pinelands counties saw \$40,496 return per farm while the Non-Pinelands county saw a \$25,048

<sup>21</sup> 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.

return per farm. In 2007, Atlantic County, with a return of \$92,678 per farm, saw the largest return, while Ocean County saw the lowest at \$3,194 return per farm.

Table E7a

## Agricultural Lands

County	Land in Farming (acres)			Percentage Change		
	1997	2002	2007	'97-'02	'02-'07	'97-'07
Atlantic	31,620	30,337	30,372	-4.1%	0.1%	-3.9%
Burlington	103,627	111,237	85,790	7.3%	-22.9%	-17.2%
Camden	9,446	10,259	8,760	8.6%	-14.6%	-7.3%
Cape May	9,840	10,037	7,976	2.0%	-20.5%	-18.9%
Cumberland	67,194	71,097	69,489	5.8%	-2.3%	3.4%
Gloucester	58,888	50,753	46,662	-13.8%	-8.1%	-20.8%
Ocean	12,061	12,239	9,833	1.5%	-19.7%	-18.5%
<b>Pinelands</b>	<b>292,676</b>	<b>295,959</b>	<b>258,882</b>	<b>1.1%</b>	<b>-12.5%</b>	<b>-11.5%</b>
Salem	92,890	96,238	96,530	3.6%	0.3%	3.9%
New Jersey	856,909	805,682	733,450	-6.0%	-9.0%	-14.4%

County	Number of Farms			Percentage Change		
	1997	2002	2007	'97-'02	'02-'07	'97-'07
Atlantic	465	456	499	-1.9%	9.4%	7.3%
Burlington	935	906	922	-3.1%	1.8%	-1.4%
Camden	236	216	225	-8.5%	4.2%	-4.7%
Cape May	165	197	201	19.4%	2.0%	21.8%
Cumberland	622	616	615	-1.0%	-0.2%	-1.1%
Gloucester	718	692	669	-3.6%	-3.3%	-6.8%
Ocean	268	217	255	-19.0%	17.5%	-4.9%
<b>Pinelands</b>	<b>3,409</b>	<b>3,300</b>	<b>3,386</b>	<b>-3.2%</b>	<b>2.6%</b>	<b>-0.7%</b>
Salem	716	753	759	5.2%	0.8%	6.0%
New Jersey	10,045	9,924	10,327	-1.2%	4.1%	2.8%

County	Average Farm Size (acres)			Percentage Change		
	1997	2002	2007	'97-'02	'02-'07	'97-'07
Atlantic	68	67	61	-1.5%	-9.0%	-10.3%
Burlington	111	123	93	10.8%	-24.4%	-16.2%
Camden	40	47	39	17.5%	-17.0%	-2.5%
Cape May	60	51	40	-15.0%	-21.6%	-33.3%
Cumberland	108	115	113	6.5%	-1.7%	4.6%
Gloucester	82	73	70	-11.0%	-4.1%	-14.6%
Ocean	45	56	39	24.4%	-30.4%	-13.3%
<b>Pinelands</b>	<b>86</b>	<b>90</b>	<b>76</b>	<b>4.5%</b>	<b>-14.7%</b>	<b>-10.9%</b>
Salem	130	128	127	-1.5%	-0.8%	-2.3%
New Jersey	85	81	71	-4.7%	-12.3%	-16.5%



Table E7b

## Agricultural Sales

County	Agricultural Sales (\$1,000s)			Percent Change			Agricultural Sales as % of NJ		
	1997	2002	2007	'97-'02	'02-'07	'97-'07	1997	2002	2007
Atlantic	\$84,276	\$90,484	\$128,339	7.4%	41.8%	52.3%	9.2%	10.5%	13.0%
Burlington	\$113,931	\$95,952	\$86,302	-15.8%	-10.1%	-24.3%	12.5%	11.1%	8.7%
Camden	\$22,739	\$15,718	\$18,554	-30.9%	18.0%	-18.4%	2.5%	1.8%	1.9%
Cape May	\$8,969	\$12,967	\$14,586	44.6%	12.5%	62.6%	1.0%	1.5%	1.5%
Cumberland	\$123,845	\$141,384	\$156,939	14.2%	11.0%	26.7%	13.6%	16.4%	15.9%
Gloucester	\$86,943	\$76,078	\$93,883	-12.5%	23.4%	8.0%	9.5%	8.8%	9.5%
Ocean	\$10,791	\$12,363	\$11,515	14.6%	-6.9%	6.7%	1.2%	1.4%	1.2%
<b>Pinelands</b>	<b>\$451,494</b>	<b>\$444,947</b>	<b>\$510,118</b>	<b>-1.4%</b>	<b>14.6%</b>	<b>13.0%</b>	<b>49.4%</b>	<b>51.5%</b>	<b>51.7%</b>
Salem	\$88,481	\$83,585	\$79,962	-5.5%	-4.3%	-9.6%	9.7%	9.7%	8.1%
New Jersey	\$913,546	\$864,258	\$986,885	-5.4%	14.2%	8.0%	100.0%	100.0%	100.0%

Table E7c

## Net Cash Return for New Jersey Farms

County	Net Cash Return (\$1,000s)			Percent Change			Net Cash Return as % of NJ		
	1997*	2002	2007	'97-'02	'02-'07	'97-'07	1997	2002	2007
Atlantic	\$19,192	\$30,676	\$46,246	59.8%	50.8%	141.0%	8.4%	17.8%	18.4%
Burlington	\$30,577	\$25,545	\$18,506	-16.5%	-27.6%	-39.5%	13.5%	14.8%	7.4%
Camden	\$10,135	\$4,351	\$6,856	-57.1%	57.6%	-32.4%	4.5%	2.5%	2.7%
Cape May	\$2,502	\$6,167	\$5,927	146.5%	-3.9%	136.9%	1.1%	3.6%	2.4%
Cumberland	\$37,939	\$37,367	\$36,907	-1.5%	-1.2%	-2.7%	16.7%	21.7%	14.7%
Gloucester	\$26,629	\$11,926	\$21,862	-55.2%	83.3%	-17.9%	11.7%	6.9%	8.7%
Ocean	\$3,408	\$1,784	\$815	-47.6%	-54.3%	-76.1%	1.5%	1.0%	0.3%
<b>Pinelands</b>	<b>\$130,381</b>	<b>\$117,816</b>	<b>\$137,119</b>	<b>-9.6%</b>	<b>16.4%</b>	<b>5.2%</b>	<b>57.4%</b>	<b>68.4%</b>	<b>54.6%</b>
Salem	\$17,933	\$10,422	\$19,011	-41.9%	82.4%	6.0%	7.9%	6.0%	7.6%
New Jersey	\$227,231	\$172,345	\$251,360	-24.2%	45.8%	10.6%	100.0%	100.0%	100.0%

Table E7d

## Net Cash Return per Farm

County	Net Cash Return per Farm			Percent Change		
	1997*	2002	2007	'97-'02	'02-'07	'97-'07
Atlantic	\$45,480	\$67,271	\$92,678	47.9%	37.8%	103.8%
Burlington	\$35,721	\$28,102	\$20,072	-21.3%	-28.6%	-43.8%
Camden	\$48,490	\$20,239	\$30,472	-58.3%	50.6%	-37.2%
Cape May	\$16,790	\$30,991	\$29,487	84.6%	-4.9%	75.6%
Cumberland	\$66,096	\$60,659	\$60,012	-8.2%	-1.1%	-9.2%
Gloucester	\$40,904	\$17,259	\$32,678	-57.8%	89.3%	-20.1%
Ocean	\$14,438	\$8,298	\$3,194	-42.5%	-61.5%	-77.9%
<b>Pinelands</b>	<b>\$38,246</b>	<b>\$35,702</b>	<b>\$40,496</b>	<b>-6.7%</b>	<b>13.4%</b>	<b>5.9%</b>
Salem	\$27,171	\$13,841	\$25,048	-49.1%	81.0%	-7.8%
New Jersey	\$24,987	\$17,373	\$24,340	-30.5%	40.1%	-2.6%

Table E7e

## Farms with Net Losses

County	Farms with Net Losses			% of All Farms with Net Losses		
	1997*	2002	2007	1997	2002	2007
Atlantic	227	197	275	48.8%	43.2%	55.1%
Burlington	369	478	526	39.5%	52.8%	57.0%
Camden	94	108	133	39.8%	50.0%	59.1%
Cape May	75	111	103	45.5%	56.3%	51.2%
Cumberland	248	314	319	39.9%	51.0%	51.9%
Gloucester	286	513	446	39.8%	74.1%	66.7%
Ocean	114	131	156	42.5%	60.4%	61.2%
<b>Pinelands</b>	<b>1,413</b>	<b>1,852</b>	<b>1,958</b>	<b>41.4%</b>	<b>56.1%</b>	<b>57.8%</b>
Salem	373	518	461	52.1%	68.8%	60.7%
New Jersey	4,995	6,117	6,278	49.7%	61.6%	60.8%

# F1

## Average Residential Property Tax Bill

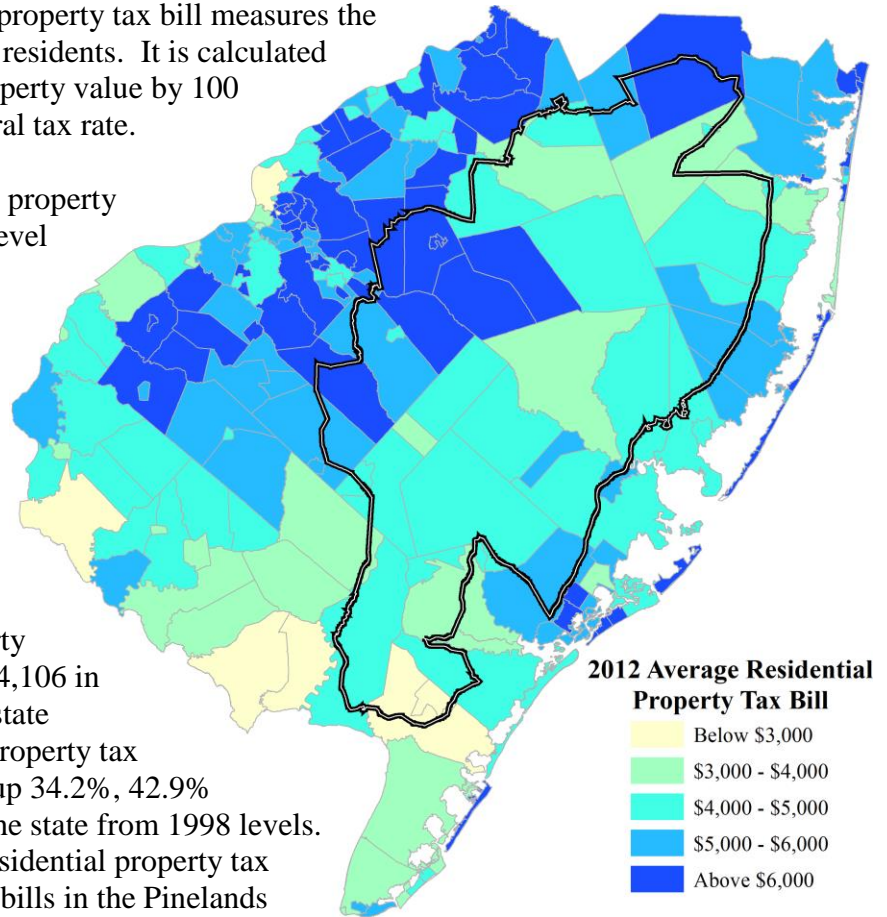
N.J. Department of Community Affairs, Div. LGS 1998 – 2012

The Pinelands continues to have the lowest average residential property tax bill in the state. In 2012, average residential property tax bills declined by 0.9% in the Pinelands, by 0.1% in the Non-Pinelands, and by 0.4% in the state.

**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 aggregated to allow for inside/outside the Pinelands and state analysis. Unless otherwise noted, all dollar amounts are adjusted for inflation to 2012 dollars.

**Findings:** The average residential tax bill has steadily increased across the state since the late 1990's. In 1998, the average residential property tax bill in the Pinelands was \$3,742, \$4,106 in the Non-Pinelands, and \$5,728 in the state overall. In 2010, average residential property tax bills peaked: the Pinelands bills were up 34.2%, 42.9% in the Non-Pinelands, and 39.0% for the state from 1998 levels. In 2011, and again in 2012, average residential property tax bills declined. The year 2012 saw tax bills in the Pinelands decrease by 1.6% from its high point in 2010. Average tax bills in the Non-Pinelands and the state fell from 2010 similarly by 1.1% and 1.3%, respectively.



**2012 Average Residential Property Tax Bill**

- Below \$3,000
- \$3,000 - \$4,000
- \$4,000 - \$5,000
- \$5,000 - \$6,000
- Above \$6,000

The 2012 average residential property tax bill in the Pinelands sits at \$4,940. In the Non-Pinelands, the average bill was \$5,802 while the state's overall average bill was \$7,857. This is a decline from 2011's bills of 0.9% in the Pinelands, 0.1% in the Non-Pinelands, and 0.4% for the state overall. The average residential property tax bill in northern New Jersey also declined, but at a rate of 0.5%. With the lowest rates, the Pinelands average residential property tax bill is 37.1% lower than that of New Jersey, overall.

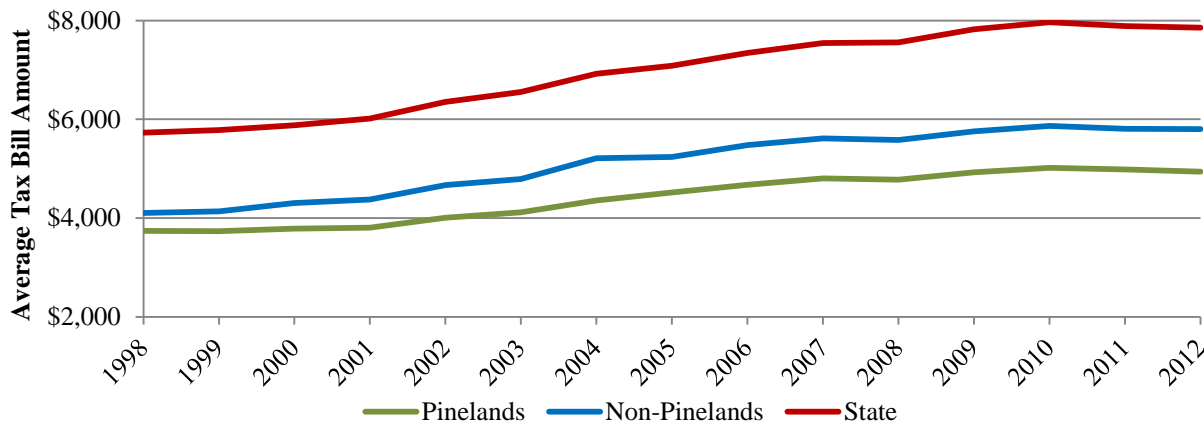
Individually, only 15 of the 47 municipalities with at least 10% of their land area in the Pinelands Area saw their average property tax bills grow from 2011. Of those, six grew by more than \$100, while one, Berkeley Township's, grew by less than one dollar. The highest percentage increase occurred in Woodbine Borough at 7.4%, which equates to \$111. The next two highest percentage growths happened in Maurice River Township and New Hanover Township at 3.6% and 3.3%, respectively. On the decreasing end, 32 municipalities saw average residential property tax bills fall; 30 of which by less than 4% and one of these, Chesilhurst Borough, by less than 0.01%. Of the two that fell by more, Southampton

Township saw a 4.8% drop while Wrightstown Borough fell by 9.7%. Wrightstown also had the largest absolute decrease of \$385.

Of the six municipalities with some land, but less than 10%, in the Pinelands Area, Berlin Borough and Corbin City saw the largest rise in average residential property tax bill at \$181 (2.8%) and \$80 (2.4%) respectively. Springfield Township saw the largest decline of \$106 or 1.4%.

Despite having the largest percent increase in average residential property tax bills, Woodbine boasts the overall lowest average residential tax bill at \$1,605, with the next lowest in Dennis Township (\$2,840). Medford Township has the largest average residential tax bill at \$9,187 while Medford Lakes Borough has the next highest at \$8,103.

**Average Residential Property Tax Bill**



**Index of Average Residential Property Tax Bill**

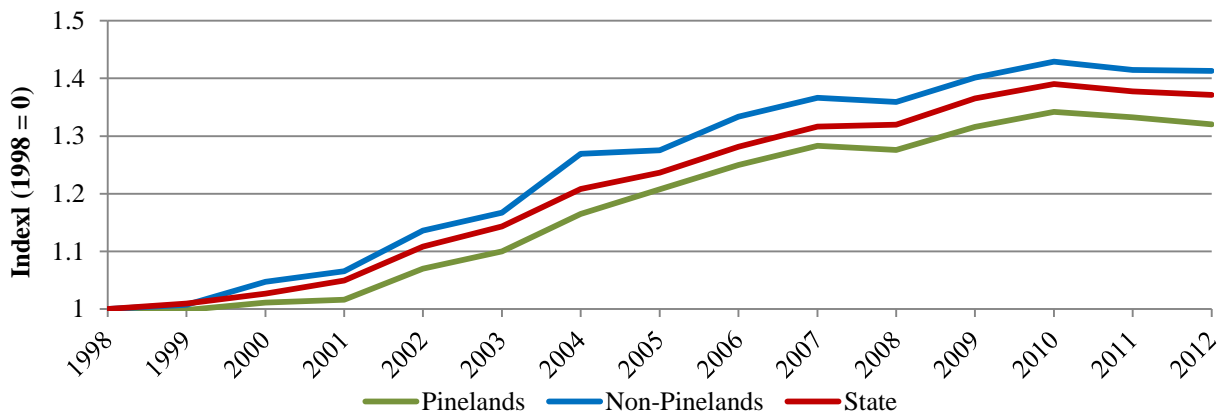


Table F1

## Average Residential Property Tax Bill

Municipality	County	2011 Average Tax Bill	2012 Average Tax Bill	Actual Change 2011 - 2012	Percent Change 2011 - 2012	2012 South N.J. Rank <sup>22</sup>
Woodbine Borough	Cape May	\$1,494	\$1,605	\$111	7.4%	200
Maurice River Township	Cumberland	\$3,987	\$4,131	\$144	3.6%	165
New Hanover Township	Burlington	\$4,032	\$4,164	\$132	3.3%	163
Buena Borough	Atlantic	\$4,481	\$4,604	\$123	2.7%	132
Eagleswood Township	Ocean	\$5,159	\$5,287	\$128	2.5%	95
Dennis Township	Cape May	\$2,785	\$2,840	\$55	2.0%	196
Waterford Township	Camden	\$6,148	\$6,261	\$113	1.8%	60
Lacey Township	Ocean	\$4,763	\$4,822	\$59	1.2%	123
Manchester Township	Ocean	\$3,699	\$3,743	\$43	1.2%	178
Berlin Township	Camden	\$5,592	\$5,655	\$63	1.1%	82
Plumsted Township	Ocean	\$5,700	\$5,756	\$56	1.0%	79
Buena Vista Township	Atlantic	\$4,358	\$4,399	\$41	0.9%	151
Bass River Township	Burlington	\$4,266	\$4,295	\$29	0.7%	158
Medford Township	Burlington	\$9,162	\$9,187	\$24	0.3%	9
Berkeley Township	Ocean	\$3,727	\$3,728	\$0	0.0%	179
Chesilhurst Borough	Camden	\$4,834	\$4,834	\$0	0.0%	121
South Toms River Borough	Ocean	\$4,299	\$4,295	-\$4	-0.1%	157
Folsom Borough	Atlantic	\$3,462	\$3,457	-\$5	-0.2%	189
Beachwood Borough	Ocean	\$4,486	\$4,476	-\$10	-0.2%	145
Egg Harbor Township	Atlantic	\$5,824	\$5,806	-\$18	-0.3%	74
Little Egg Harbor Township	Ocean	\$4,516	\$4,498	-\$19	-0.4%	143
Upper Township	Cape May	\$4,474	\$4,448	-\$26	-0.6%	148
Medford Lakes Borough	Burlington	\$8,170	\$8,103	-\$66	-0.8%	15
Galloway Township	Atlantic	\$4,635	\$4,598	-\$38	-0.8%	133
Lakehurst Borough	Ocean	\$4,495	\$4,456	-\$39	-0.9%	147
Weymouth Township	Atlantic	\$4,138	\$4,096	-\$41	-1.0%	166
Stafford Township	Ocean	\$5,795	\$5,728	-\$66	-1.1%	80
Pemberton Township	Burlington	\$3,420	\$3,380	-\$40	-1.2%	193
Port Republic City	Atlantic	\$5,230	\$5,168	-\$62	-1.2%	108
Estell Manor City	Atlantic	\$3,939	\$3,889	-\$51	-1.3%	174
Hammonton Town	Atlantic	\$4,784	\$4,722	-\$62	-1.3%	129
Egg Harbor City	Atlantic	\$5,735	\$5,650	-\$86	-1.5%	83
Franklin Township	Gloucester	\$5,249	\$5,164	-\$86	-1.6%	109
Jackson Township	Ocean	\$6,591	\$6,482	-\$110	-1.7%	50
Monroe Township	Gloucester	\$6,551	\$6,420	-\$132	-2.0%	53
Winslow Township	Camden	\$5,478	\$5,345	-\$132	-2.4%	93
Hamilton Township	Atlantic	\$4,539	\$4,418	-\$121	-2.7%	150
Ocean Township	Ocean	\$4,655	\$4,528	-\$127	-2.7%	140
Washington Township	Burlington	\$3,553	\$3,456	-\$97	-2.7%	190
Evesham Township	Burlington	\$6,941	\$6,750	-\$191	-2.8%	38
Barneget Township	Ocean	\$5,825	\$5,660	-\$165	-2.8%	81
Shamong Township	Burlington	\$7,769	\$7,531	-\$238	-3.1%	23
Mullica Township	Atlantic	\$4,695	\$4,549	-\$146	-3.1%	137
Tabernacle Township	Burlington	\$6,865	\$6,633	-\$232	-3.4%	45
Woodland Township	Burlington	\$4,940	\$4,759	-\$181	-3.7%	126
Southampton Township	Burlington	\$5,063	\$4,820	-\$243	-4.8%	124
Wrightstown Borough	Burlington	\$3,994	\$3,608	-\$385	-9.7%	185
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Berlin Borough	Camden	\$6,455	\$6,636	\$181	2.8%	44
Corbin City	Atlantic	\$3,305	\$3,385	\$80	2.4%	192
Toms River Township	Ocean	\$5,455	\$5,460	\$5	0.1%	87
North Hanover Township	Burlington	\$5,788	\$5,779	-\$9	-0.2%	77
Vineland City	Cumberland	\$3,960	\$3,945	-\$14	-0.4%	172
Springfield Township	Burlington	\$7,368	\$7,262	-\$106	-1.4%	26

<sup>22</sup> Rankings are out of the 202 municipalities in southern New Jersey; Rankings are ordered in descending order from highest 2012 average residential property tax bill (1) to lowest 2012 average residential property tax bill (202).

# F2

## State Equalized Valuation

N.J. Department of Community Affairs, Div. LGS 1998 – 2012

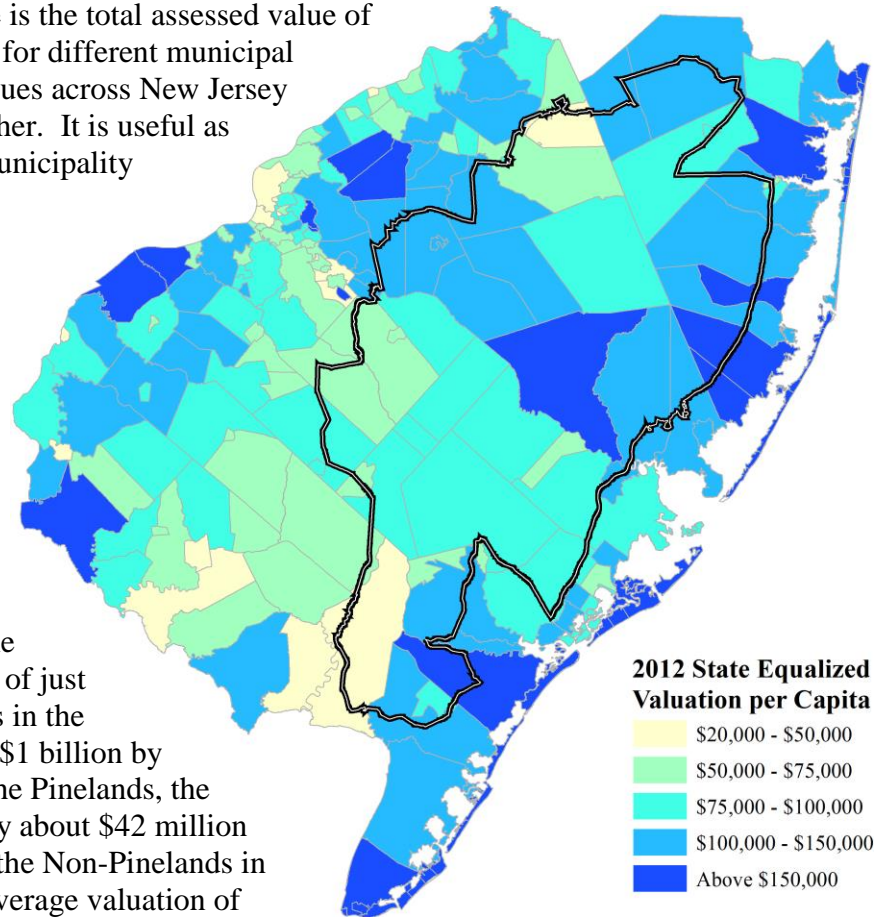
All three regions have seen a decline in state equalized valuation since the high points in 2007. In 2012, valuation in the Pinelands fell 6.3%, while the Non-Pinelands fell 6.6% and the state fell 6.1%.

**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.

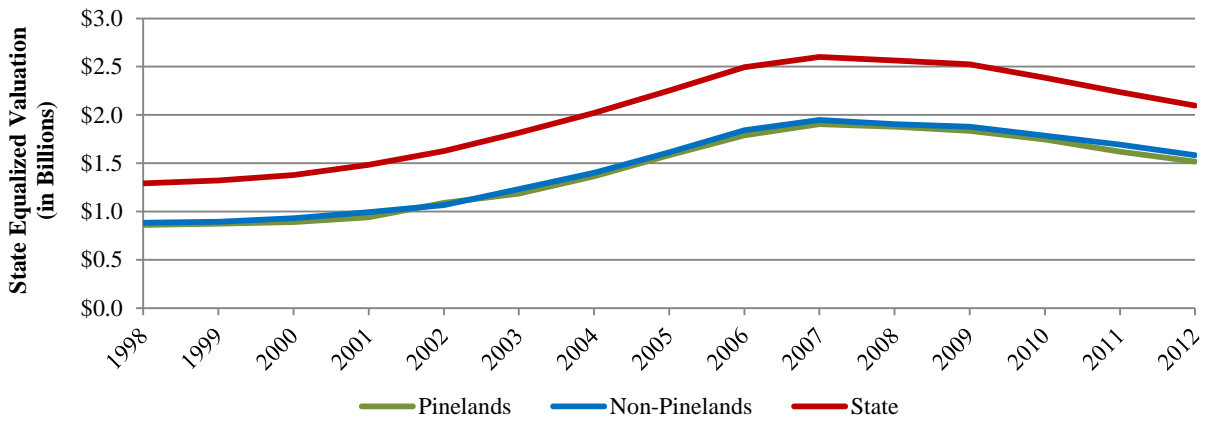
**Unit of Analysis:** State equalized valuation data are compiled at the municipal level and aggregated to allow for inside/outside the Pinelands and state analysis. Unless otherwise noted, all dollar amounts are adjusted for inflation to 2012 dollars.

**Findings:** Average state equalized valuation across New Jersey was on the rise until 2007. Starting at a valuation of just under \$861 million in 1998, valuations in the Pinelands had increased by more than \$1 billion by 2007 to \$1,904,555,018. Relative to the Pinelands, the Non-Pinelands valuation was higher by about \$42 million dollars (a \$1,946,107,908 average for the Non-Pinelands in 2007), while the state overall had an average valuation of \$2,601,278,491. Overall, this had amounted to increases that were 121.2% higher than 1998 in the Pinelands. Likewise, the Non-Pinelands saw values 120.5% higher than in 1998 while the state only saw valuations that were 101.7% higher. This shows that there was much greater valuation growth for the southern half of the state versus the northern half.

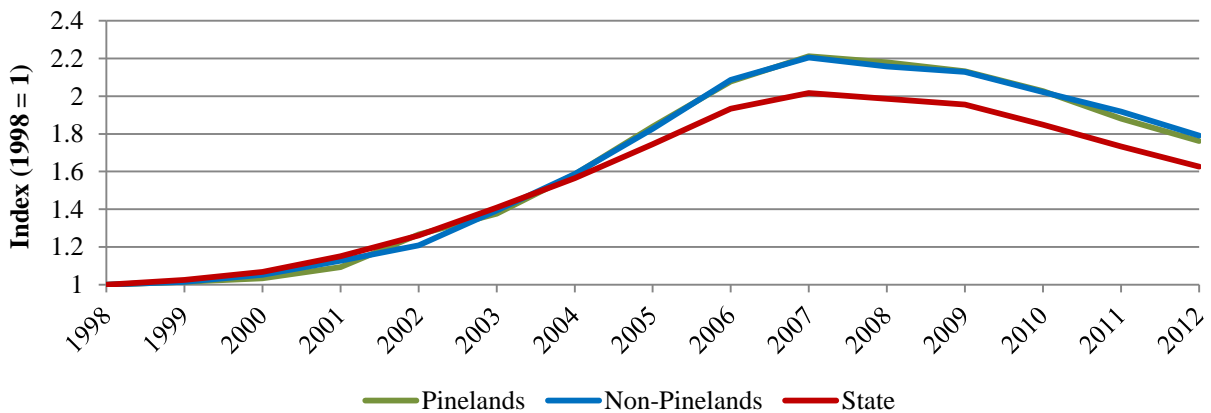
However, with the economic recession came decreased valuations. All across the state, values began to fall; slight decreases at first, followed by steeper decreases from 2009 onward. In 2012, the average Pinelands state equalized valuation was at \$1,516,883,506; a 20.4% decrease from the 2007 high. The Non-Pinelands and state saw declines of 18.7% and 19.4%, respectively, from 2007. This equates to a 2012 average state equalized valuation of \$1,581,409,892 in the Non-Pinelands and \$2,097,422,721 in the state. Despite the onslaught of the national recession, the valuations of the Pinelands and the Non-Pinelands appear to be weathering the downturn better than that of northern New Jersey, while the Non-Pinelands' valuation is doing slightly better than that of the Pinelands.



### 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 \$6,687,221,063 is the greatest. Berkeley Township and Evesham Township are also notable, with values that top \$5 billion. At the bottom end, Wrightstown Borough had the lowest state equalized valuation at \$38,633,437. New Hanover Township and Chesilhurst Borough are the only other Pinelands municipalities with valuations of less than \$100 million. Of the six municipalities with some land, but less than 10%, in the Pinelands Area, Toms River Township’s valuation is just over \$16 billion in 2012, while Corbin City comes in at about \$55 million.

Despite the Pinelands’ overall decline in valuation, only four of the 53 municipalities with any amount of land in the Pinelands Area showed an increase in state equalized valuation in 2012. Lakehurst Borough, Washington Township, Woodbine Borough, and Buena Vista Township all posted gains at 8.5%, 3.3%, 2.7%, and 2.0%, respectively. Additionally, all four are municipalities with at least 10% of their land in the Pinelands Area. New Hanover Township and Wrightstown Borough were the only two municipalities to have a valuation decrease of more than 20% at 24.9% and 26.3%, respectively.

Table F2

## State Equalized Valuation

Municipality	County	2012 Population Estimate	2012 State Equalized Valuation	2012 Equalized Valuation per Capita
Upper Township	Cape May	12,247	\$2,026,669,894	\$165,483
Ocean Township	Ocean	8,518	\$1,355,123,570	\$159,089
Stafford Township	Ocean	26,945	\$4,225,524,246	\$156,820
Eagleswood Township	Ocean	1,650	\$257,569,785	\$156,103
Washington Township	Burlington	686	\$107,084,869	\$156,100
Lacey Township	Ocean	27,825	\$3,981,664,661	\$143,097
Dennis Township	Cape May	6,407	\$879,471,678	\$137,267
Medford Township	Burlington	23,227	\$3,161,765,414	\$136,125
Berkeley Township	Ocean	41,498	\$5,275,431,135	\$127,125
Bass River Township	Burlington	1,440	\$182,721,391	\$126,890
Little Egg Harbor Township	Ocean	20,336	\$2,545,500,669	\$125,172
Port Republic City	Atlantic	1,114	\$135,352,732	\$121,502
Jackson Township	Ocean	55,616	\$6,687,221,063	\$120,239
Evesham Township	Burlington	45,755	\$5,193,735,535	\$113,512
Medford Lakes Borough	Burlington	4,185	\$466,038,985	\$111,359
Barnegat Township	Ocean	21,418	\$2,369,163,892	\$110,616
Shamong Township	Burlington	6,497	\$703,960,796	\$108,352
Southampton Township	Burlington	10,453	\$1,112,495,210	\$106,428
Tabernacle Township	Burlington	6,978	\$720,072,728	\$103,192
Plumsted Township	Ocean	8,519	\$876,459,594	\$102,883
Berlin Township	Camden	5,421	\$555,241,331	\$102,424
Estell Manor City	Atlantic	1,734	\$176,638,539	\$101,868
Egg Harbor Township	Atlantic	43,628	\$4,233,431,374	\$97,035
Folsom Borough	Atlantic	1,873	\$179,761,927	\$95,975
Hammonton Town	Atlantic	14,751	\$1,372,271,391	\$93,029
Hamilton Township	Atlantic	26,728	\$2,440,875,399	\$91,323
Galloway Township	Atlantic	37,318	\$3,253,933,289	\$87,195
Manchester Township	Ocean	43,043	\$3,718,480,685	\$86,390
Mullica Township	Atlantic	6,190	\$529,765,743	\$85,584
Buena Vista Township	Atlantic	7,577	\$639,173,164	\$84,357
Beachwood Borough	Ocean	11,100	\$923,756,967	\$83,221
Woodland Township	Burlington	1,802	\$146,073,239	\$81,062
Franklin Township	Gloucester	16,741	\$1,312,143,731	\$78,379
Woodbine Borough	Cape May	2,462	\$189,042,255	\$76,784
Waterford Township	Camden	10,711	\$811,673,079	\$75,779
Lakehurst Borough	Ocean	2,664	\$201,256,371	\$75,547
Monroe Township	Gloucester	36,597	\$2,656,607,625	\$72,591
Winslow Township	Camden	39,238	\$2,662,797,220	\$67,863
Buena Borough	Atlantic	4,565	\$294,697,229	\$64,556
South Toms River Borough	Ocean	3,696	\$232,790,112	\$62,984
Weymouth Township	Atlantic	2,717	\$160,668,168	\$59,134
Egg Harbor City	Atlantic	4,299	\$252,228,316	\$58,671
Pemberton Township	Burlington	27,944	\$1,565,373,783	\$56,018
Chesilhurst Borough	Camden	1,643	\$89,470,938	\$54,456
Wrightstown Borough	Burlington	801	\$38,633,437	\$48,232
Maurice River Township	Cumberland	8,146	\$321,534,554	\$39,471
New Hanover Township	Burlington	7,859	\$72,177,054	\$9,184
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>				
Toms River Township	Ocean	92,093	\$16,064,575,113	\$174,439
Springfield Township	Burlington	3,414	\$412,079,274	\$120,703
Corbin City	Atlantic	502	\$55,365,208	\$110,289
Berlin Borough	Camden	7,606	\$768,221,563	\$101,002
Vineland City	Cumberland	60,854	\$4,145,023,032	\$68,114
North Hanover Township	Burlington	7,725	\$437,032,881	\$56,574

# F3

## Effective Tax Rate

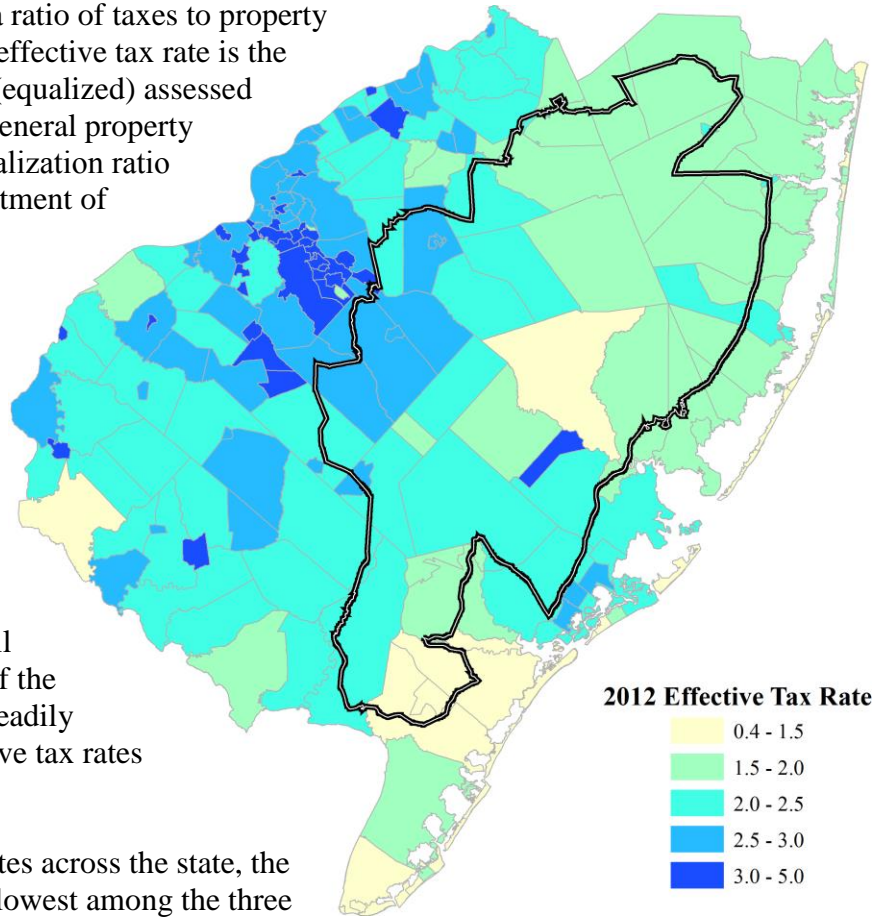
N.J. Department of the Treasury 2000 - 2012

To compensate for decreasing property values, municipalities continue to raise taxes. The Pinelands rate rose by 5.8% while the Non-Pinelands by increased by 5.1% and the state by 5.7%. The effective tax rate (2.10) in the Pinelands 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 aggregated to allow for inside/outside the Pinelands and state analysis.

**Findings:** Statewide, municipal effective tax rates have followed a similar trend; in the early part of the 2000’s, rates began a slow decline until bottoming out in the mid-to-late part of the decade. Since then, rates have been steadily increasing. This trend of rising effective tax rates continued in 2012.



**2012 Effective Tax Rate**

- 0.4 - 1.5
- 1.5 - 2.0
- 2.0 - 2.5
- 2.5 - 3.0
- 3.0 - 5.0

Despite the increase of effective tax rates across the state, the Pinelands average continues to be the lowest among the three regions. In 2012, rates rose 0.12 to an average of 2.10 after a slightly smaller increase (0.10) in 2011. Likewise, the Non-Pinelands and the state average effective tax rate rose 0.11 (to 2.34) and 0.12 (to 2.27), respectively.

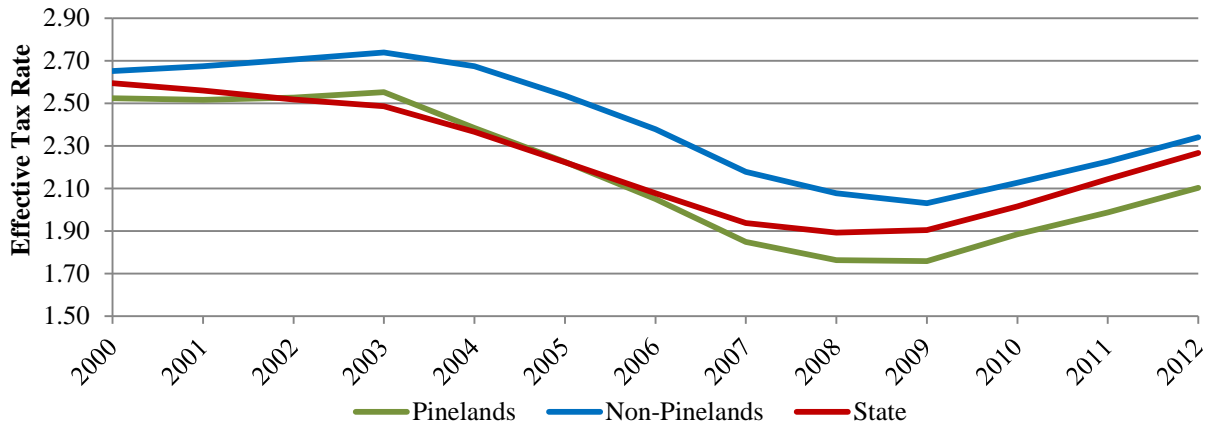
**Effective Tax Rate by Region**

Region	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
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
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
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

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



### Index of Effective Tax Rate

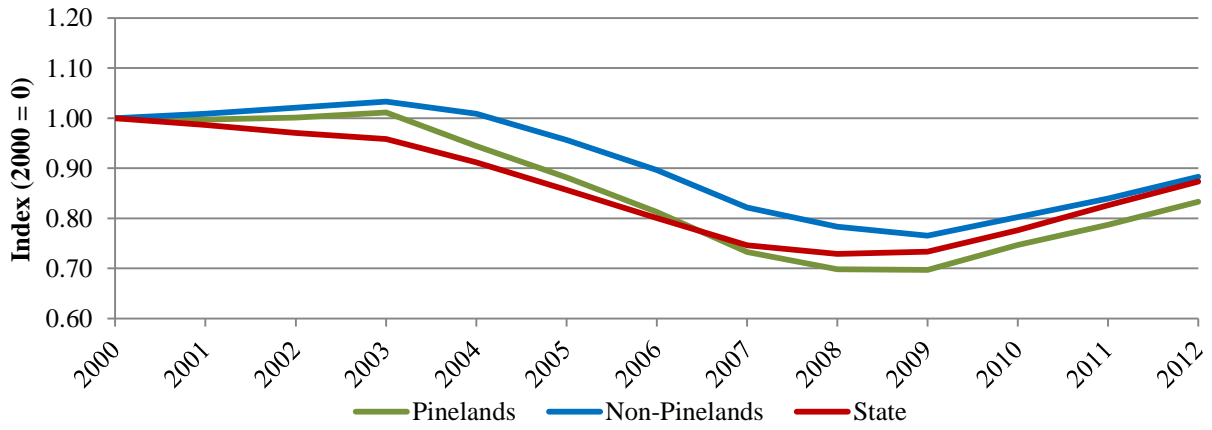


Table F3

## 2012 Effective Tax Rates

Municipality	County	2012 Effective Tax Rate	South N.J. Rank
Egg Harbor City	Atlantic	3.44	15
Berlin Township	Camden	3.28	23
Monroe Township	Gloucester	2.98	36
Chesilhurst Borough	Camden	2.96	38
Waterford Township	Camden	2.92	44
Winslow Township	Camden	2.81	50
Medford Lakes Borough	Burlington	2.67	64
Medford Township	Burlington	2.61	71
Buena Borough	Atlantic	2.59	75
Franklin Township	Gloucester	2.47	87
Egg Harbor Township	Atlantic	2.44	89
Evesham Township	Burlington	2.41	92
Hamilton Township	Atlantic	2.31	106
Wrightstown Borough	Burlington	2.21	112
Galloway Township	Atlantic	2.19	115
Shamong Township	Burlington	2.19	115
Barnegat Township	Ocean	2.18	117
Tabernacle Township	Burlington	2.17	119
Buena Vista Township	Atlantic	2.16	121
South Toms River Borough	Ocean	2.16	122
Southampton Township	Burlington	2.12	125
Lakehurst Borough	Ocean	2.10	129
Maurice River Township	Cumberland	2.08	130
Hammonton Town	Atlantic	2.07	131
Mullica Township	Atlantic	2.00	134
Pemberton Township	Burlington	1.95	137
Jackson Township	Ocean	1.95	138
Weymouth Township	Atlantic	1.93	139
Manchester Township	Ocean	1.93	140
Little Egg Harbor Township	Ocean	1.86	145
Eagleswood Township	Ocean	1.85	146
Estell Manor City	Atlantic	1.84	148
Port Republic City	Atlantic	1.83	150
Stafford Township	Ocean	1.83	150
Beachwood Borough	Ocean	1.82	152
Plumsted Township	Ocean	1.80	153
Woodland Township	Burlington	1.80	154
Berkeley Township	Ocean	1.71	157
Lacey Township	Ocean	1.61	161
Folsom Borough	Atlantic	1.61	162
Bass River Township	Burlington	1.59	163
New Hanover Township	Burlington	1.55	165
Ocean Township	Ocean	1.52	169
Dennis Township	Cape May	1.39	173
Upper Township	Cape May	1.38	174
Washington Township	Burlington	1.36	175
Woodbine Borough	Cape May	1.19	180
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>			
Berlin Borough	Camden	2.69	56
Springfield Township	Burlington	2.35	102
Vineland City	Cumberland	2.12	126
North Hanover Township	Burlington	1.75	156
Toms River Township	Ocean	1.57	164
Corbin City	Atlantic	1.35	176

# F4 Assessment Class Proportions in Municipal Tax Revenue

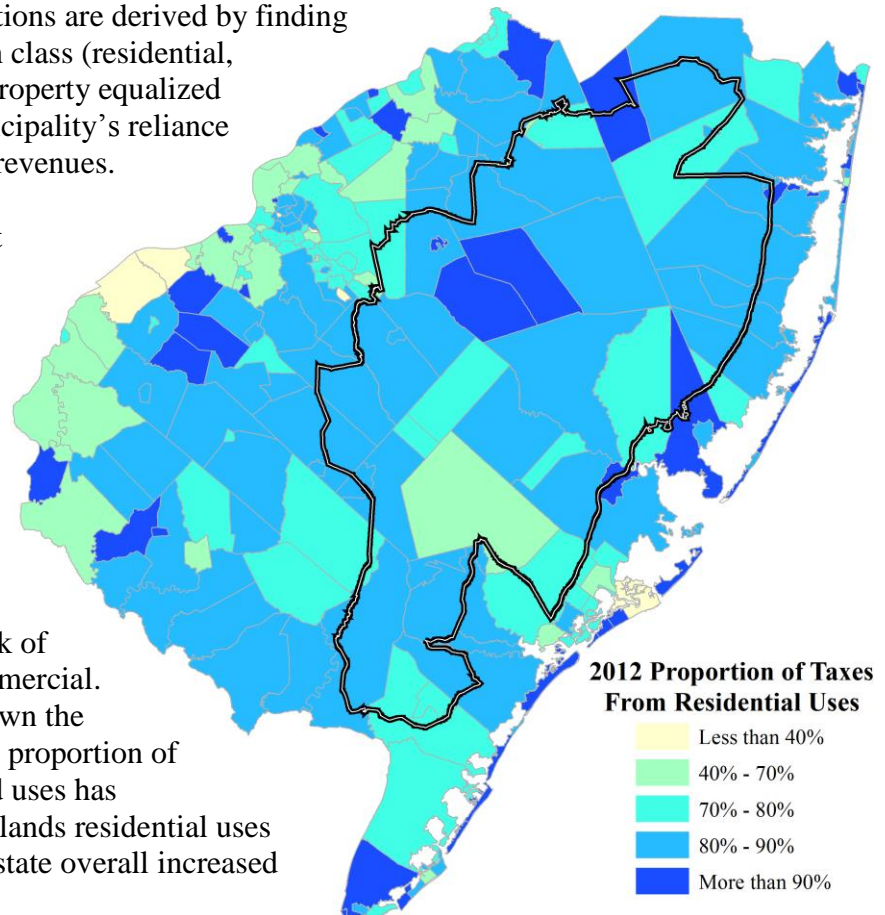
N.J. Department of Community Affairs, Div. LGS 1999 – 2012

Relative to 2000, the 2012 proportion of tax revenue from residential properties is growing in the Pinelands (up 4.4%) while the proportion from vacant and commercial properties are down 38.9% and 9.9%, respectively.

**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 aggregated to allow for inside/outside the Pinelands and statewide analysis.

**Findings:** Land use changes have evolved slowly over time. Beginning in 1999, little has changed in the Pinelands, the Non-Pinelands, and the State. Residential has, and continues to, make up the bulk of tax revenues. The next highest is commercial. In all three regions, residential has grown the most since 2000. In the Pinelands, the proportion of taxes contributed to by residential land uses has increased by 4.4% while the Non-Pinelands residential uses increased their share by 6.3% and the state overall increased by 5.5%.



For the Pinelands municipalities, this growth came primarily at the expense of taxes provided by vacant land and commercial uses. Since 2000, the share of taxes provided by vacant land fell by 38.9% (1.9 percentage points) while the share provided by commercial uses fell by 9.9% (1.1 percentage points). The Non-Pinelands show a greater decline in commercial's share, dropping by 13.9% (2.6 percentage points), while industry showed the next greatest decrease at 32.6% (1.0 percentage points). At the state level, industry saw the greatest loss in share, as it fell by 34.6% (2.0 percentage points) and commercial fell by 7.3% (1.1 percentage points). While a dropping vacant share is expected as lands become developed, a dropping non-residential share may reflect a growing imbalance between development types.

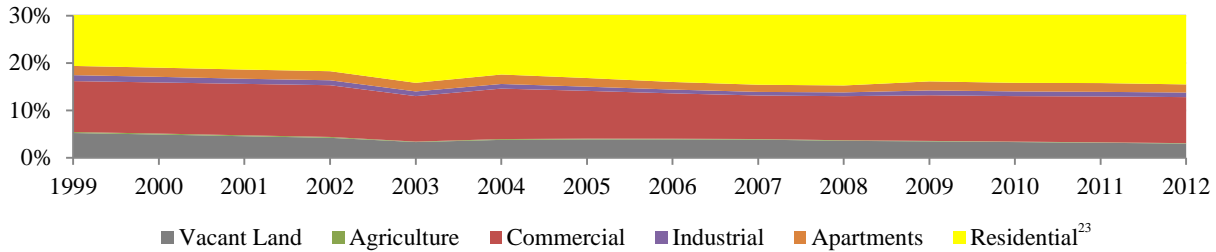
In the Pinelands, Medford Lakes Borough has the greatest proportion of its taxes coming from residential uses. At 97.9%, Medford Lakes Borough edges out Tabernacle Township and Shamong Township, both of which have residential properties contributing to just over 95% of their total tax revenues. On the other end, Wrightstown Borough has only 49.7% of their taxes coming from residential uses, followed by Berlin Township at 52.6%.

Additionally, Wrightstown Borough and Berlin Township have the greatest portion of their tax revenues from commercial uses; 34.4% and 34.2%, respectively. Wrightstown Borough benefits from the proximity of the Joint Base McGuire-Dix-Lakehurst, whose employees patronize local businesses whereas Berlin Township is located within the more urbanized Camden County. Wrightstown also gets 11.8% of its tax revenue from apartments (the highest share in the Pinelands). Industry provides 11.7% of Folsom Borough's tax revenues and 9.0% of Berlin Township's. Only three municipalities receive more than 1.0% of their taxes from agriculture (Estell Manor City, Washington Township, and New Hanover Township) while 22 municipalities receive less than 0.1% of their taxes from agriculture.

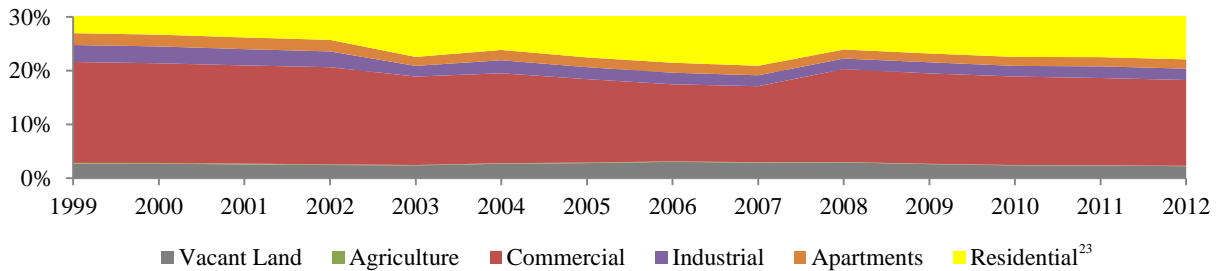
**Table F4a**

**Assessment Class Proportions in Municipal Valuations**

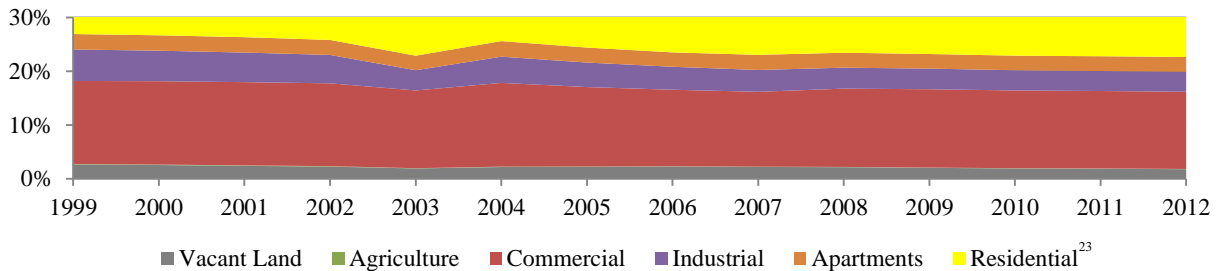
Pinelands								
Class	2000	2002	2004	2006	2008	2010	2012	Change 2000 - 2012
Vacant Land	4.91%	4.21%	3.78%	3.89%	3.58%	3.32%	3.00%	-1.91%
Residential	80.98%	81.73%	82.43%	84.01%	84.74%	84.18%	84.51%	3.53%
Agriculture	0.20%	0.19%	0.18%	0.14%	0.12%	0.10%	0.09%	-0.11%
Commercial	10.78%	10.91%	10.64%	9.57%	9.30%	9.60%	9.71%	-1.07%
Industrial	1.19%	1.04%	0.97%	0.80%	0.80%	0.99%	0.97%	-0.22%
Apartments	1.94%	1.92%	2.00%	1.60%	1.46%	1.81%	1.72%	-0.22%



Non-Pinelands								
Class	2000	2002	2004	2006	2008	2010	2012	Change 2000 - 2012
Vacant Land	2.68%	2.44%	2.67%	3.03%	2.92%	2.38%	2.22%	-0.46%
Residential	73.32%	74.30%	76.17%	78.54%	76.09%	77.46%	77.92%	4.60%
Agriculture	0.14%	0.13%	0.11%	0.09%	0.07%	0.07%	0.07%	-0.08%
Commercial	18.53%	18.05%	16.71%	14.32%	17.28%	16.45%	15.96%	-2.58%
Industrial	3.13%	2.94%	2.42%	2.16%	1.96%	1.98%	2.11%	-1.02%
Apartments	2.19%	2.14%	1.91%	1.85%	1.68%	1.67%	1.73%	-0.47%



State								
Class	2000	2002	2004	2006	2008	2010	2012	Change 2000 - 2012
Vacant Land	2.56%	2.27%	2.19%	2.28%	2.16%	1.92%	1.79%	-0.77%
Residential	73.32%	74.19%	74.40%	76.50%	76.56%	77.11%	77.35%	4.02%
Agriculture	0.09%	0.08%	0.07%	0.06%	0.05%	0.04%	0.04%	-0.04%
Commercial	15.49%	15.40%	15.57%	14.22%	14.55%	14.45%	14.35%	-1.14%
Industrial	5.68%	5.28%	4.87%	4.27%	3.89%	3.76%	3.71%	-1.97%
Apartments	2.86%	2.78%	2.90%	2.68%	2.78%	2.71%	2.76%	-0.10%



<sup>23</sup> Residential values make up the remaining share up to 100%.

**Table F4b Assessment Class Proportions for Pinelands Municipalities (2012)**

Municipality	County	Vacant	Residential	Agriculture	Commercial	Industrial	Apartments
Medford Lakes Borough	Burlington	0.26%	97.87%	0.00%	1.87%	0.00%	0.00%
Tabernacle Township	Burlington	1.15%	95.39%	0.40%	2.96%	0.11%	0.00%
Shamong Township	Burlington	1.23%	95.34%	0.32%	2.70%	0.41%	0.00%
Beachwood Borough	Ocean	1.62%	94.93%	0.00%	3.27%	0.02%	0.16%
Port Republic City	Atlantic	2.76%	93.89%	0.07%	3.28%	0.00%	0.00%
Little Egg Harbor Township	Ocean	4.00%	90.73%	0.00%	5.14%	0.02%	0.11%
Plumsted Township	Ocean	2.36%	90.54%	0.20%	5.22%	1.32%	0.37%
Ocean Township	Ocean	4.67%	89.90%	0.02%	5.33%	0.07%	0.00%
Pemberton Township	Burlington	1.83%	89.75%	0.35%	5.74%	0.20%	2.13%
Waterford Township	Camden	2.65%	89.73%	0.32%	6.53%	0.26%	0.51%
Berkeley Township	Ocean	2.42%	89.71%	0.00%	6.24%	0.48%	1.15%
Mullica Township	Atlantic	4.62%	88.93%	0.81%	5.06%	0.39%	0.18%
Southampton Township	Burlington	1.70%	88.61%	0.67%	8.05%	0.97%	0.00%
Franklin Township	Gloucester	2.96%	88.26%	0.73%	7.80%	0.00%	0.24%
Barneget Township	Ocean	4.76%	87.35%	0.00%	6.19%	0.25%	1.45%
Winslow Township	Camden	2.53%	87.22%	0.17%	7.11%	1.25%	1.72%
Estell Manor City	Atlantic	6.94%	86.86%	1.52%	2.85%	1.33%	0.51%
Jackson Township	Ocean	2.92%	86.80%	0.01%	8.36%	0.68%	1.24%
Stafford Township	Ocean	2.74%	86.63%	0.00%	10.50%	0.02%	0.11%
Medford Township	Burlington	1.12%	86.56%	0.09%	9.38%	0.73%	2.11%
Chesilhurst Borough	Camden	7.55%	85.95%	0.00%	5.18%	0.86%	0.46%
Upper Township	Cape May	3.79%	85.84%	0.02%	9.22%	1.09%	0.05%
Woodland Township	Burlington	5.08%	85.30%	0.59%	3.55%	5.48%	0.00%
Monroe Township	Gloucester	2.79%	85.30%	0.08%	10.22%	0.45%	1.17%
Lacey Township	Ocean	2.77%	84.03%	0.02%	7.87%	5.19%	0.12%
South Toms River Borough	Ocean	1.94%	84.00%	0.00%	13.93%	0.13%	0.00%
Buena Vista Township	Atlantic	5.17%	83.98%	0.36%	8.43%	1.99%	0.07%
Galloway Township	Atlantic	3.59%	83.13%	0.04%	10.84%	0.44%	1.97%
Weymouth Township	Atlantic	5.49%	83.08%	0.00%	9.74%	0.21%	1.47%
Buena Borough	Atlantic	2.82%	82.60%	0.56%	9.84%	1.25%	2.93%
Maurice River Township	Cumberland	7.67%	82.54%	0.70%	6.50%	2.39%	0.21%
Lakehurst Borough	Ocean	1.71%	82.39%	0.00%	15.59%	0.00%	0.30%
Washington Township	Burlington	3.22%	81.59%	1.35%	12.14%	1.71%	0.00%
Egg Harbor City	Atlantic	2.30%	79.48%	0.00%	13.55%	2.52%	2.15%
Dennis Township	Cape May	5.30%	79.29%	0.15%	15.26%	0.00%	0.00%
Evesham Township	Burlington	0.63%	78.93%	0.01%	15.11%	0.60%	4.71%
Bass River Township	Burlington	6.02%	78.31%	0.37%	15.30%	0.00%	0.00%
Egg Harbor Township	Atlantic	4.22%	77.50%	0.02%	16.82%	1.12%	0.32%
Manchester Township	Ocean	4.33%	77.46%	0.01%	8.80%	0.68%	8.73%
Woodbine Borough	Cape May	4.54%	77.33%	0.06%	13.76%	2.10%	2.22%
New Hanover Township	Burlington	2.47%	76.27%	1.00%	20.12%	0.14%	0.00%
Folsom Borough	Atlantic	3.89%	76.21%	0.17%	8.00%	11.74%	0.00%
Eagleswood Township	Ocean	10.89%	75.14%	0.02%	12.06%	1.76%	0.13%
Hammonton Town	Atlantic	2.07%	74.28%	0.66%	20.58%	1.54%	0.88%
Hamilton Township	Atlantic	4.73%	68.88%	0.08%	20.78%	1.05%	4.48%
Berlin Township	Camden	3.12%	52.59%	0.01%	34.19%	8.97%	1.13%
Wrightstown Borough	Burlington	3.13%	49.70%	0.05%	34.37%	0.92%	11.83%
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	1.96%	85.84%	1.74%	10.46%	0.00%	0.00%
Corbin City	Atlantic	6.04%	84.10%	0.17%	9.69%	0.00%	0.00%
Toms River Township	Ocean	1.77%	82.98%	0.00%	13.43%	0.45%	1.37%
North Hanover Township	Burlington	1.78%	80.97%	0.89%	12.99%	0.08%	3.29%
Berlin Borough	Camden	2.26%	79.56%	0.01%	15.80%	1.42%	0.95%
Vineland City	Cumberland	1.25%	71.92%	0.20%	18.83%	5.79%	2.02%

# F5 Local Municipal Purpose Revenues & State Aid

N.J. Department of Community Affairs, Div. LGS 1999 – 2012

Average municipal budgets decreased 2.9% in the Pinelands while the Non-Pinelands budgets decreased 2.5% from 2011. The Non-Pinelands continues to have a higher average per capita budget than the Pinelands.

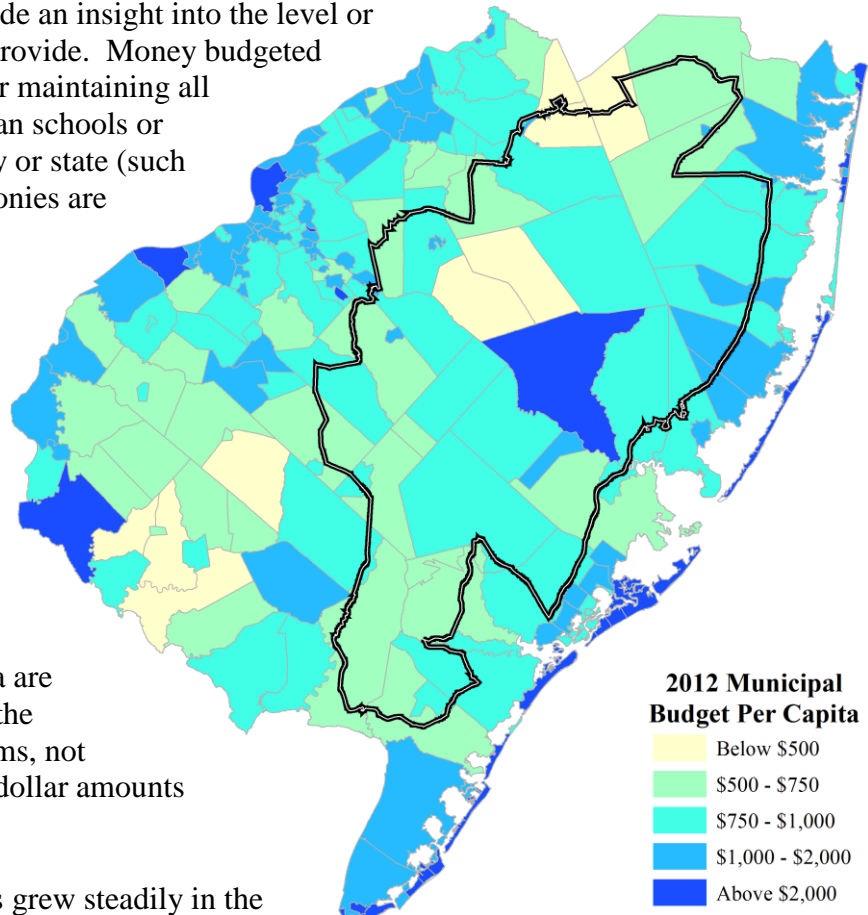
**Description:** Per capita revenues provide an insight into the level or amount of service a municipality can provide. Money budgeted for local municipal purposes is used for maintaining all services within a municipality other than schools or infrastructure maintained by the county or state (such as 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 such as user or license fees. Per capita rates were calculated by using intercensal estimates and census counts, when available.

**Unit of Analysis:** Municipal level data are aggregated to allow for inside/outside the Pinelands analysis. Aggregates are sums, not averages. Unless otherwise noted, all dollar amounts have been adjusted to 2012 dollars.

**Findings:** Municipal purpose revenues grew steadily in the Pinelands and the Non-Pinelands in the early and mid-2000s before beginning to decline at the end of the decade. In 2009, municipal purpose revenues in the Pinelands hit its highest levels of the monitoring period: 30.1% greater than revenues in 1999. Likewise the Non-Pinelands saw their highest revenue levels a year later in 2010: 25.6% greater than 1999 levels. The subsequent decline in revenues in the two regions has been more prevalent in the Pinelands.

In 2012, municipal budgets in the Pinelands fell by 2.9% (about \$17 million) while the Non-Pinelands budgets dropped by 2.5% (about \$58 million). These 2012 municipal budgets are 8.2% lower than the previous 2009 high in the Pinelands, while the Non-Pinelands is down only 5.2% from the 2010 high point. In absolute terms, the 2012 total municipal budget for the Pinelands was \$579,305,295. The budget in the Non-Pinelands was \$2,283,855,248.

On a per capita basis, the Non-Pinelands consistently have a higher budget per capita than the Pinelands. In 2000, the Pinelands budget per capita was \$787, while the Non-Pinelands per capita budget was \$1,170. Over time, that percentage has decreased. The 2012 budget per capita in the Pinelands is 62.4% of the



Non-Pinelands per capita budget, however the absolute difference has increased. In 2000, the difference between the two budgets was \$382, but in 2012, that difference has increased to \$497. Most recently, the per capita budget in the Pinelands decreased by 3.2% in 2012 (\$27) to \$825 per capita. The Non-Pinelands per capita budget fell by 2.5% (\$34) to \$1,322 per capita.

	Population Estimate	Total Municipal Budget <sup>24</sup>	Municipal Budget Per Capita	State Aid	State Aid per Capita
Pinelands in 2000	618,063	\$486,520,510	\$787	\$130,649,080	\$211
Pinelands in 2012	702,562	\$579,305,295	\$825	\$83,513,740	\$119
<b>Change</b>	13.7%	19.1%	4.8%	-36.1%	-43.8%
Non-Pinelands in 2000	1,645,496	\$1,924,564,821	\$1,170	\$395,685,724	\$240
Non-Pinelands in 2012	1,727,654	\$2,283,855,248	\$1,322	\$270,313,764	\$156
<b>Change</b>	5.0%	18.7%	13.0%	-31.7%	-34.9%

Municipalities also rely on state aid to supplement local revenues. Since 1999, state aid given to the Pinelands municipalities has been on the decline, overall. The state aid given to the Pinelands in 1999 was \$221 per capita. With the exception of slight increases in 2001 and 2004, this figure has continued to decrease. As of 2012, the state-aid given to the Pinelands municipalities has fallen to \$119 per capita; a 1.7% decrease from 2011 and a 46.3% decrease from 1999.

State-aid in the Non-Pinelands has been much more volatile since 1999, while also showing an overall decrease. Non-Pinelands state aid increased from \$246 per capita in 1999 to \$248 per capita in 2007. In 2011, Non-Pinelands state aid reached its low point of \$136 per capita. In 2012, 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 \$156 per capita; a 15.2% increase from 2011.

Of the Pinelands municipalities with at least 10% of their total area in the Pinelands Area, Stafford Township has the largest municipal budget at \$39,682,363 in 2012. Other municipalities with municipal budgets above \$30 million are Berkeley Township, Jackson Township, Egg Harbor Township, Evesham Township, and Monroe Township (in descending order). The smallest municipal budget belongs to Port Republic City at \$966,430; the only municipal budget below \$1 million.

The largest percent changes in municipal budget happened in Maurice River Township, where the municipal budget rose by 32.7% from 2011. The next largest budget percent growth took place in Weymouth Township (up 11.3%). Twelve other municipalities saw their budgets grow, but all less than 10%. On the decreasing side, 27 municipalities saw declines, however 22 of those declined by less than 10%. Wrightstown Borough's municipal budget declined by 28.9%; the largest percent decline. The only other municipality to see its municipal budget shrink by more than 20% was Bass River Township, falling 22.7%.

In terms of per capita municipal budgets, Wrightstown Borough has the largest at \$1,546<sup>25</sup> (a decrease of 28.8% from 2011) with nine other municipalities topping \$1,000 per capita. Plumsted Township posts the lowest 2012 per capita municipal budget at \$369; an increase of 0.9%. Only three other municipalities have 2012 per capita municipal budgets less than \$500: Plumsted Township, Shamong Township, and Tabernacle Township (in ascending order).

Lacey Township received more state aid in 2012 than any other Pinelands municipality (it was the only Pinelands municipality to receive more than \$7 million in total state aid). At \$11,273,840, total state aid,

<sup>24</sup> Local Municipal Purposes + Total of Miscellaneous; does not include school budget.

<sup>25</sup> New Hanover Township and Washington Township 2011 and 2012 municipal budgets are representative of miscellaneous revenues only due to missing data.



Lacey Township received \$405 per capita. Upper Township received the next highest total amount at \$6,323,653 (\$516 per capita). In terms of per capita state aid, Washington Township received the most at \$1,191 (\$817,007 total); more than double that of the next highest amount of \$516 per capita in Upper Township.

The lowest total state aid amount occurred in Port Republic, who received \$176,307 (a figure that equates to \$158 per capita). Folsom Borough was the only other Pinelands municipality to receive less than \$200,000 total state aid; Folsom Borough received \$186,082 (\$99 per capita). The lowest per capita amounts occurred in Barnegat (\$49 per capita in state aid) and Plumsted Township (\$53 per capita in state aid).

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	\$184,040,051	\$300,965,078	\$485,005,129	\$794	\$135,285,566	\$221
2000	618,063	\$187,588,687	\$298,931,823	\$486,520,510	\$787	\$130,649,080	\$211
2001	630,581	\$202,111,686	\$306,181,147	\$508,292,833	\$806	\$135,034,406	\$214
2002	643,688	\$210,295,851	\$309,445,990	\$519,741,841	\$807	\$132,028,044	\$205
2003	655,268	\$224,703,484	\$305,762,208	\$530,465,692	\$810	\$129,842,526	\$198
2004	664,840	\$239,570,023	\$306,519,567	\$546,089,590	\$821	\$133,885,343	\$201
2005	671,991	\$253,514,259	\$319,876,093	\$573,390,351	\$853	\$131,447,816	\$196
2006	678,998	\$273,508,023	\$323,450,534	\$596,958,556	\$879	\$127,148,400	\$187
2007	683,974	\$291,504,974	\$324,789,367	\$616,294,341	\$901	\$126,023,330	\$184
2008	688,959	\$311,360,388	\$308,887,179	\$620,247,568	\$900	\$112,391,801	\$163
2009	693,936	\$331,771,784	\$298,992,139	\$630,763,924	\$909	\$109,532,388	\$158
2010	698,092	\$347,425,316	\$271,680,655	\$619,105,970	\$887	\$89,462,365	\$128
2011	700,494	\$353,284,412	\$243,123,462	\$596,407,874	\$851	\$85,088,911	\$121
2012	702,562	\$355,698,814	\$223,606,481	\$579,305,295	\$825	\$83,513,740	\$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	\$894,953,710	\$1,021,732,146	\$1,916,685,856	\$1,169	\$403,007,639	\$246
2000	1,645,496	\$894,056,322	\$1,030,508,499	\$1,924,564,821	\$1,170	\$395,685,724	\$240
2001	1,655,892	\$891,596,984	\$1,031,745,697	\$1,923,342,682	\$1,162	\$396,909,453	\$240
2002	1,672,319	\$939,551,147	\$1,049,944,354	\$1,989,495,502	\$1,190	\$387,938,751	\$232
2003	1,686,044	\$981,517,309	\$1,046,618,304	\$2,028,135,613	\$1,203	\$381,140,172	\$226
2004	1,697,698	\$1,024,045,631	\$1,100,717,284	\$2,124,762,916	\$1,252	\$396,854,251	\$234
2005	1,705,381	\$1,086,303,701	\$1,145,616,176	\$2,231,919,877	\$1,309	\$421,577,124	\$247
2006	1,713,543	\$1,143,139,587	\$1,093,150,811	\$2,236,290,398	\$1,305	\$411,785,193	\$240
2007	1,716,916	\$1,188,760,695	\$1,112,816,428	\$2,301,577,123	\$1,341	\$425,550,087	\$248
2008	1,719,558	\$1,273,060,064	\$1,113,184,707	\$2,386,244,772	\$1,388	\$365,296,326	\$212
2009	1,721,609	\$1,357,445,796	\$1,035,751,382	\$2,393,197,178	\$1,390	\$373,831,210	\$217
2010	1,723,949	\$1,421,659,918	\$986,329,005	\$2,407,988,923	\$1,397	\$242,393,116	\$141
2011	1,726,721	\$1,402,087,434	\$939,636,371	\$2,341,723,805	\$1,356	\$234,518,610	\$136
2012	1,727,654	\$1,406,642,473	\$877,212,775	\$2,283,855,248	\$1,322	\$270,313,764	\$156

**Table F5b Municipal Purpose Revenues and State Aid by Municipality (2012)**

Municipality	County	Population Estimate	Municipal Budget	Municipal Budget Per Capita	Total State Aid	State Aid per Capita
Washington Township <sup>26</sup>	Burlington	686	\$1,407,347	\$2,052	\$817,007	\$1,191
Wrightstown Borough	Burlington	801	\$1,238,486	\$1,546	\$412,067	\$514
Chesilhurst Borough	Camden	1,643	\$2,519,930	\$1,534	\$826,340	\$503
Stafford Township	Ocean	26,945	\$39,682,363	\$1,473	\$2,606,872	\$97
Berlin Township	Camden	5,421	\$7,477,808	\$1,379	\$1,287,847	\$238
Egg Harbor City	Atlantic	4,299	\$5,901,652	\$1,373	\$473,461	\$110
Lakehurst Borough	Ocean	2,664	\$3,583,979	\$1,345	\$295,439	\$111
Ocean Township	Ocean	8,518	\$10,751,819	\$1,262	\$606,801	\$71
Eagleswood Township	Ocean	1,650	\$2,038,300	\$1,235	\$203,363	\$123
South Toms River Borough	Ocean	3,696	\$3,910,380	\$1,058	\$330,995	\$90
Medford Lakes Borough	Burlington	4,185	\$4,204,711	\$1,005	\$289,600	\$69
Berkeley Township	Ocean	41,498	\$39,596,562	\$954	\$4,256,465	\$103
Lacey Township	Ocean	27,825	\$26,525,172	\$953	\$11,273,840	\$405
Hamilton Township	Atlantic	26,728	\$25,336,494	\$948	\$2,841,043	\$106
Barneget Township	Ocean	21,418	\$20,298,326	\$948	\$1,048,932	\$49
Medford Township	Burlington	23,227	\$21,937,012	\$944	\$1,991,135	\$86
Upper Township	Cape May	12,247	\$11,468,013	\$936	\$6,323,653	\$516
Little Egg Harbor Township	Ocean	20,336	\$18,939,466	\$931	\$1,449,056	\$71
Woodland Township	Burlington	1,802	\$1,633,730	\$907	\$628,559	\$349
Woodbine Borough	Cape May	2,462	\$2,222,307	\$903	\$289,537	\$118
Monroe Township	Gloucester	36,597	\$32,528,148	\$889	\$4,035,796	\$110
Waterford Township	Camden	10,711	\$9,452,629	\$883	\$1,304,676	\$122
Mullica Township	Atlantic	6,190	\$5,379,795	\$869	\$493,216	\$80
Port Republic City	Atlantic	1,114	\$966,430	\$868	\$176,307	\$158
Beachwood Borough	Ocean	11,100	\$9,622,692	\$867	\$664,673	\$60
Bass River Township	Burlington	1,440	\$1,241,000	\$862	\$304,290	\$211
Buena Borough	Atlantic	4,565	\$3,923,671	\$860	\$419,272	\$92
Pemberton Township	Burlington	27,944	\$23,300,826	\$834	\$3,018,097	\$108
Egg Harbor Township	Atlantic	43,628	\$34,811,608	\$798	\$6,039,065	\$138
Hammonton Town	Atlantic	14,751	\$11,615,224	\$787	\$1,272,714	\$86
Winslow Township	Camden	39,238	\$29,085,908	\$741	\$6,050,378	\$154
Dennis Township	Cape May	6,407	\$4,651,733	\$726	\$1,643,523	\$257
Evesham Township	Burlington	45,755	\$32,837,213	\$718	\$3,164,693	\$69
Weymouth Township	Atlantic	2,717	\$1,874,465	\$690	\$281,895	\$104
Jackson Township	Ocean	55,616	\$38,176,618	\$686	\$3,408,439	\$61
Galloway Township	Atlantic	37,318	\$24,288,664	\$651	\$2,581,284	\$69
Folsom Borough	Atlantic	1,873	\$1,176,600	\$628	\$186,082	\$99
Manchester Township	Ocean	43,043	\$26,532,008	\$616	\$3,217,467	\$75
Estell Manor City	Atlantic	1,734	\$1,068,227	\$616	\$316,382	\$182
Franklin Township	Gloucester	16,741	\$10,286,304	\$614	\$1,451,704	\$87
Buena Vista Township	Atlantic	7,577	\$4,533,998	\$598	\$716,567	\$95
Maurice River Township	Cumberland	8,146	\$4,486,684	\$551	\$850,305	\$104
Southampton Township	Burlington	10,453	\$5,671,224	\$543	\$1,105,861	\$106
Tabernacle Township	Burlington	6,978	\$3,383,280	\$485	\$630,161	\$90
Shamong Township	Burlington	6,497	\$2,737,783	\$421	\$582,995	\$90
Plumsted Township	Ocean	8,519	\$3,147,487	\$369	\$452,322	\$53
New Hanover Township <sup>26</sup>	Burlington	7,859	\$1,851,220	\$236	\$893,564	\$114
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Toms River Township	Ocean	92,093	\$100,681,043	\$1,093	\$8,492,807	\$92
Springfield Township	Burlington	3,414	\$3,326,272	\$974	\$426,607	\$125
Vineland City	Cumberland	60,854	\$56,385,867	\$927	\$6,190,788	\$102
Berlin Borough	Camden	7,606	\$6,870,329	\$903	\$696,697	\$92
Corbin City	Atlantic	502	\$434,128	\$865	\$102,127	\$203
North Hanover Township	Burlington	7,725	\$3,134,086	\$406	\$765,714	\$99

<sup>26</sup> Local Municipal Purposes + total miscellaneous revenues; New Hanover Township and Washington Township 2011 and 2012 municipal budgets are representative of miscellaneous revenues only due to incomplete data.

## Appendix A. Selected References

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

County Boundaries: ESRI

Municipal Boundaries: ESRI

Census Block Groups: ESRI

Census Blocks: U.S. Census Bureau

Berry Agriculture Location: USDA National Agriculture Statistics Service

Pinelands Area Boundary: N.J. Pinelands Commission

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

County Boundaries: N.J. Office of Information Technology

Municipal Boundaries: N.J. Office of Information Technology

Pinelands Area Boundary: N.J. Pinelands Commission

Pinelands Management Areas: N.J. Pinelands Commission

Water Bodies: U.S. Geological Survey

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

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

## **Appendix B.**

## **Previous Special Studies**

### **Value-Added Blueberry Products Study**

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

### **Housing Task Force Study**

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

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

### **Pinelands Development Credit Supply & Demand Study**

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

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

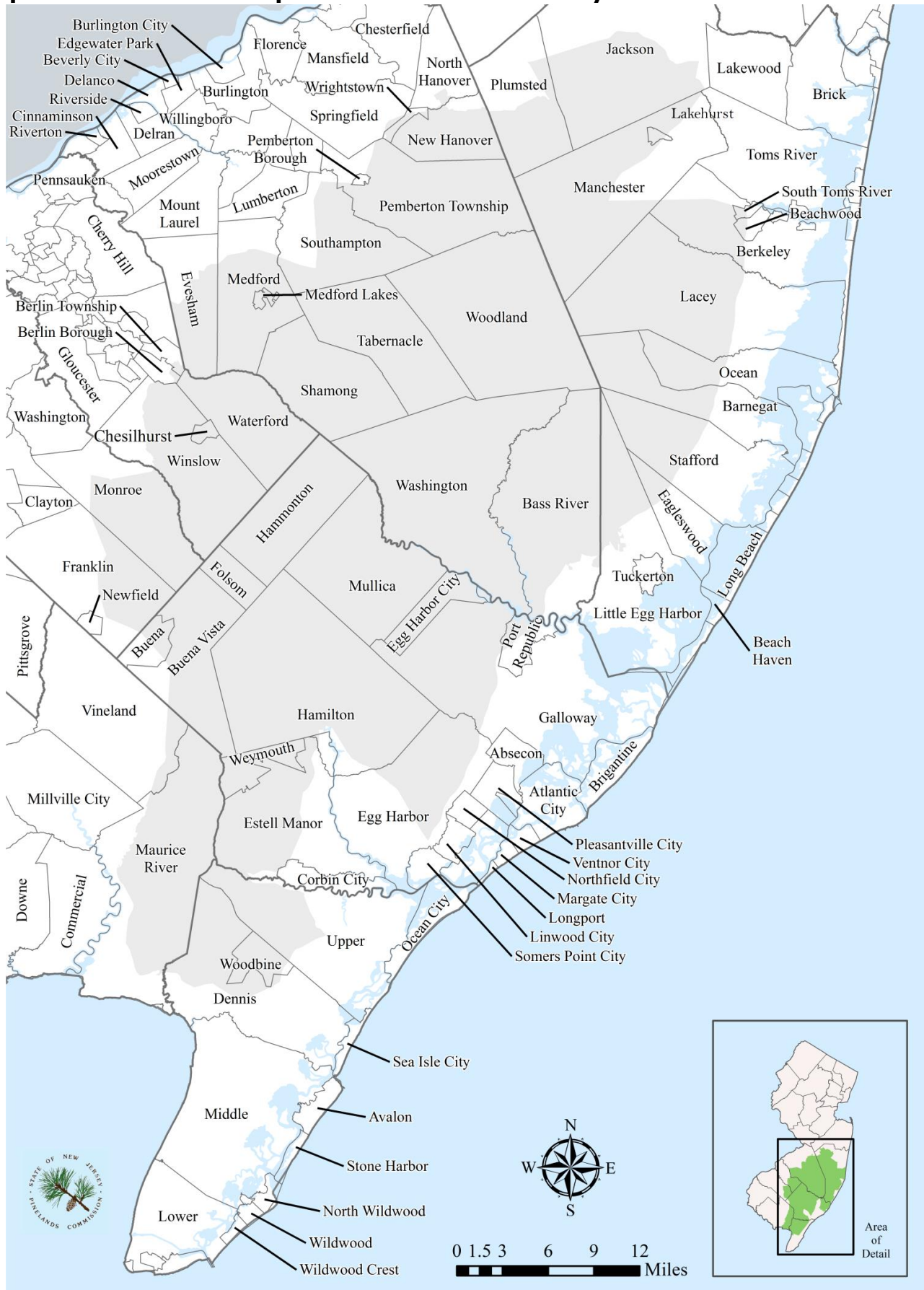
This study is a comprehensive review of what has worked well to this point, in addition to examining new ideas on how further to stimulate use of PDCs in the coming years. A preliminary package of recommendations was submitted to the Policy and Implementation Committee in the summer of 2007.



## Appendix C. Pinelands Acreage by County

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

# Appendix D. Municipalities of the New Jersey Pinelands

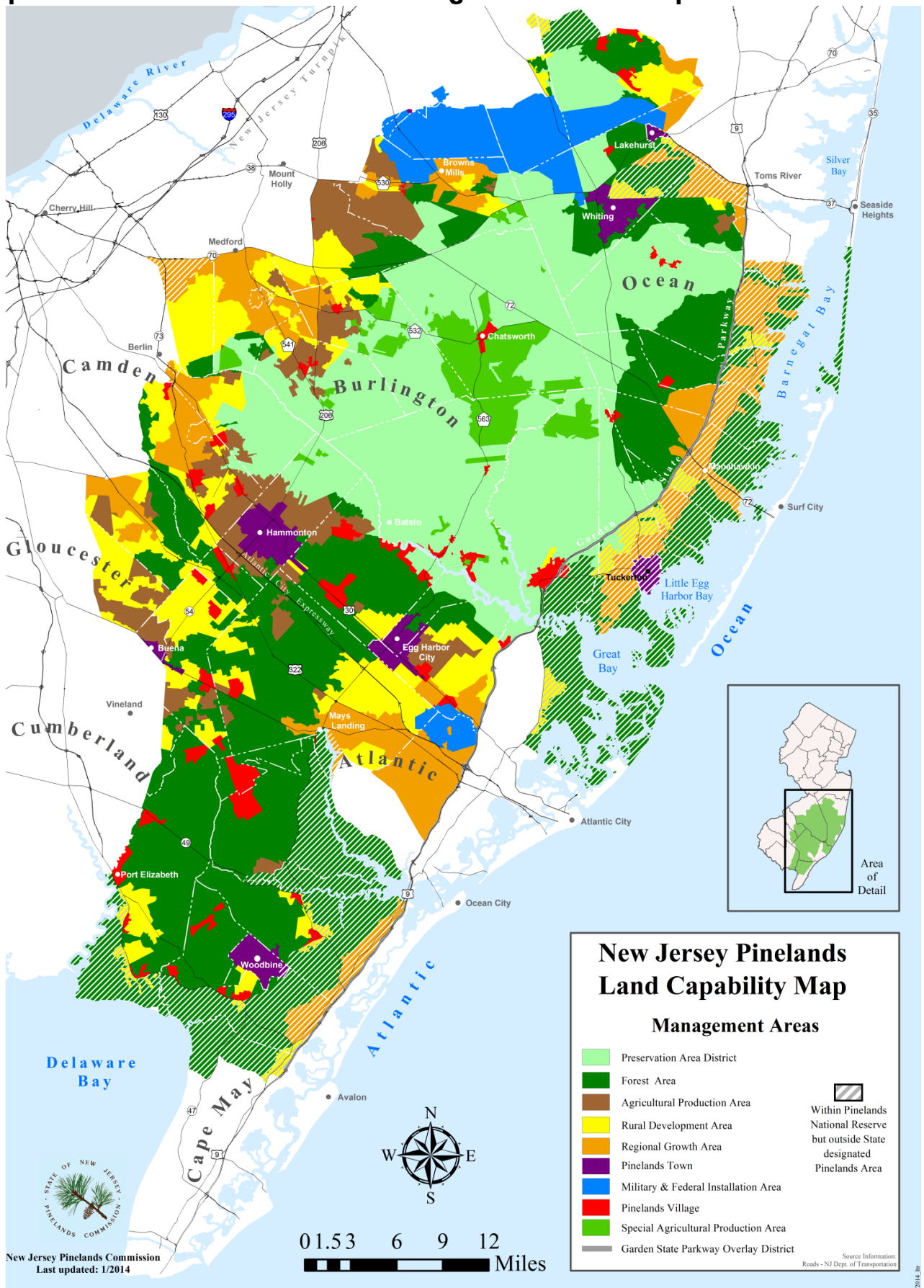


## Appendix E.

## Pinelands Management Areas

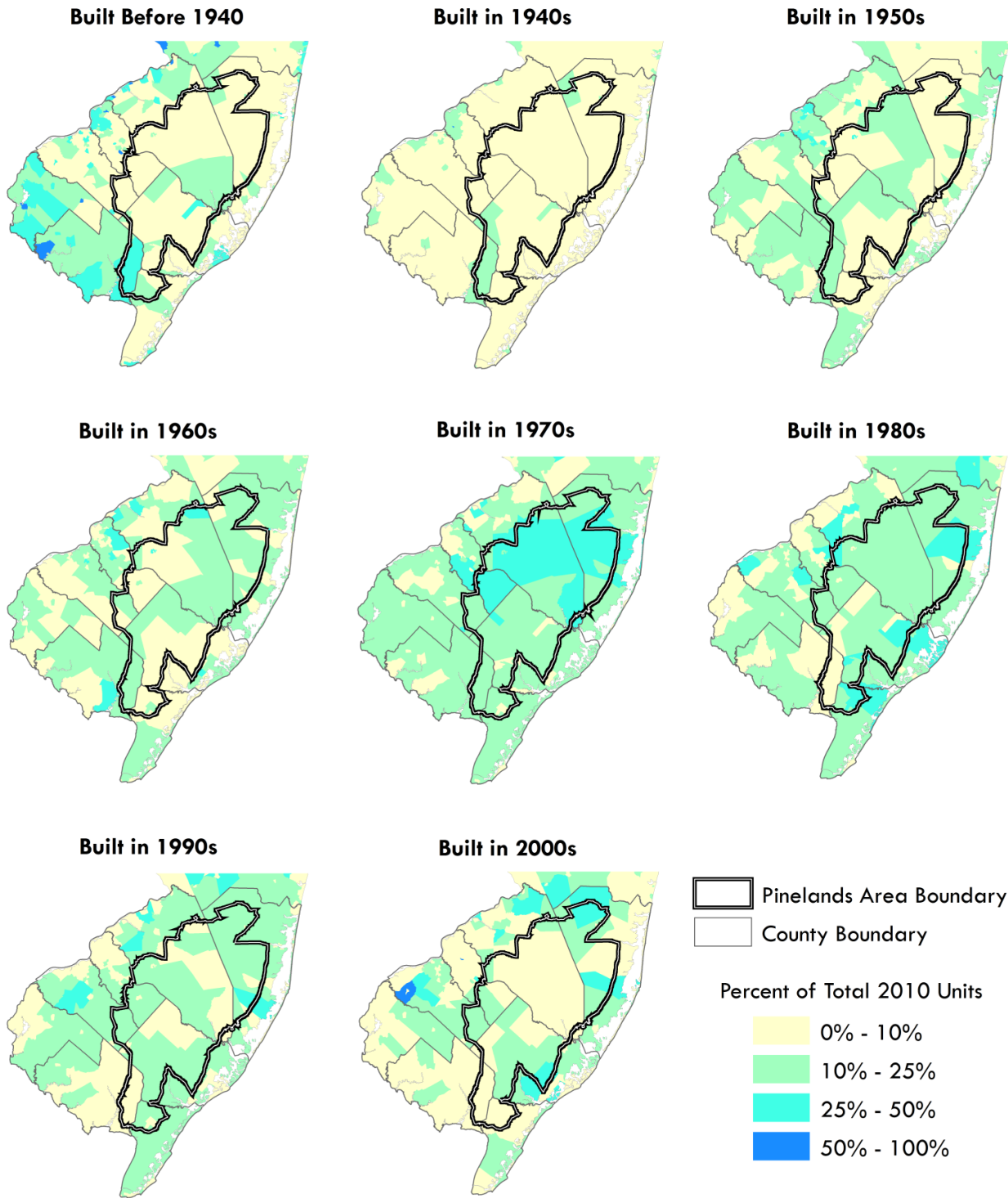
Management Areas	Description	Permitted Uses	
		Residential	Non-residential
Preservation Area District	Core of the Pinelands environment and the most critical ecological region; a large, contiguous wilderness area of forest which supports diverse plant and animal communities, many of which are threatened and endangered species.	None except 1 acre lots in designated infill areas	Limited commercial uses in designated infill areas
Special Agricultural Production Area	Discrete areas within the Preservation Area primarily used for berry agriculture and horticulture of plants native to the Pinelands.	Farm-related housing on 40 acres	Expansion of existing uses only
Forest Area	Similar to the Preservation Area District in terms of ecological value; a largely undeveloped area which 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.	5 acre minimum. Historical development average has been 1 unit per 28 acres	Roadside retail within 300 feet of pre-existing use
Agricultural Production Area	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 on 40 acres	Agricultural commercial; roadside retail within 300 feet of pre-existing use
Rural Development Area	Areas which are slightly modified and suitable for limited future development; represents a balance of environmental and development values that is intermediate between Forest Areas and existing growth areas.	Historical development average has been 1 unit per 5 acres	Small scale community commercial and light industrial uses on septic systems
Pinelands Village	Small, existing, spatially discrete settlements which are appropriate for infill residential, commercial, and industrial development compatible with their existing character.	1 to 5 acre lots if not sewerred	Commercial and industrial uses compatible with existing character
Pinelands Town	Large, existing spatially discrete settlements.	2 to 4 homes per acre with sewers	Commercial and industrial uses
Regional Growth Area	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 4 homes per acre with sewers	Commercial and industrial uses
Military and Federal Installation Area	Federal enclaves within the Pinelands.	Not Applicable	Uses associated with function of the installation or other public purpose uses

# Appendix F. Pinelands Management Areas Map



# Appendix G. Southern New Jersey Housing Unit Construction

## Percentage of Total Housing in 2010 Built in Each Decade



20 0 20 40 Miles

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. This year's report has an updated layout featuring capability maps for each municipality.

### **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.

### **Capability Map**

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 management area boundaries. For example, areas marked as "development" were synonymous with the Pineland's 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 2000 to 2012 (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 indicates the percentage of assessed value derived from each land-use category.

### **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 the previous (2009) Fact Book should be interpreted with caution, as data volatility can often be responsible for a municipality’s change in rank.

### **Specific Caveats**

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

Pomona, Cologne, and Oceanville are all places within Galloway, a single township). The number of business establishments for each municipality should be regarded as illustrative and not as exact figures.

### **County Level Fact Sheets**

County-level fact sheets are reported for the seven 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.



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**Counties**

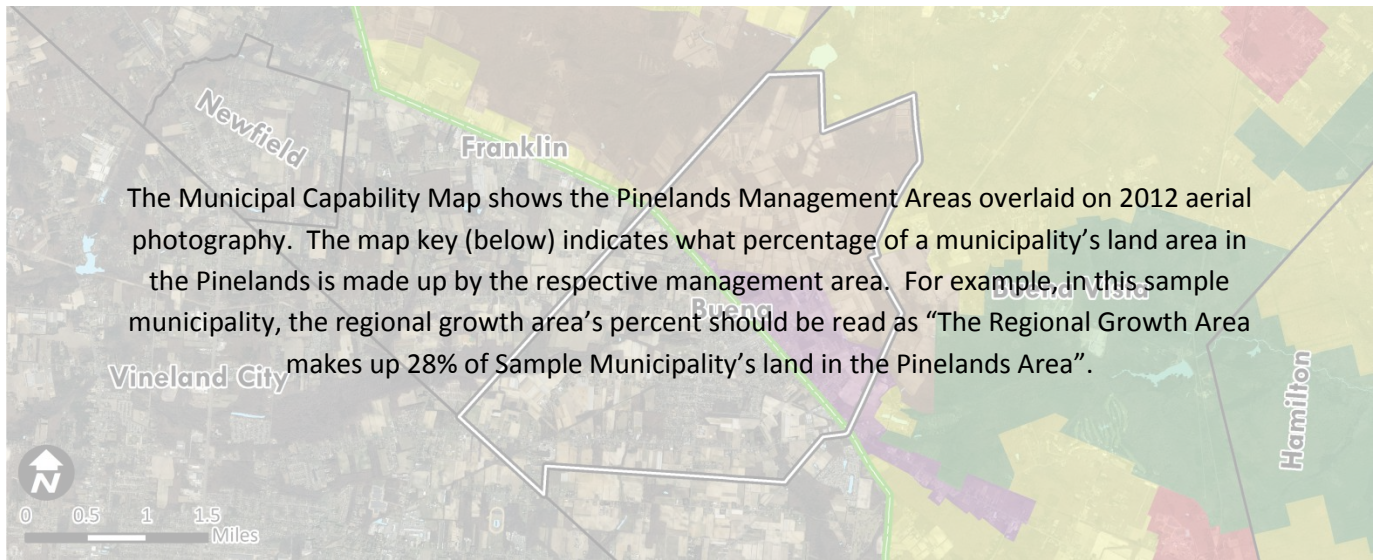
Atlantic County ..... H60  
Burlington County ..... H61  
Camden County ..... H62  
Cape May County ..... H63  
Cumberland County ..... H64  
Gloucester County..... H65  
Ocean County ..... H66

**Pinelands Area Municipalities..... H67**

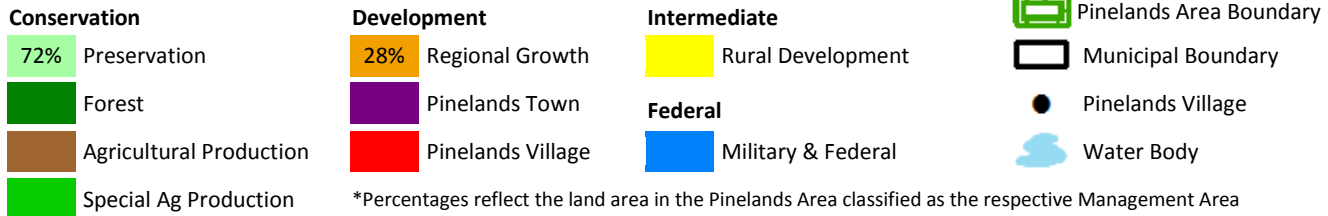
# Sample Municipality



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



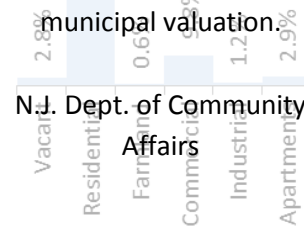
## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate		U.S. Census Bureau	
Population Density (per mile <sup>2</sup> )		N.J. Pinelands Commission	
Population Change - 2000 to 2012		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	
Unemployment Rate		N.J. Dept. of Labor	
Private Sector Employment		Private Sector Establishments	
N.J. Dept. of Labor		N.J. Dept. of Labor	

## Assessment Class Proportions in 2012 Municipal Valuations

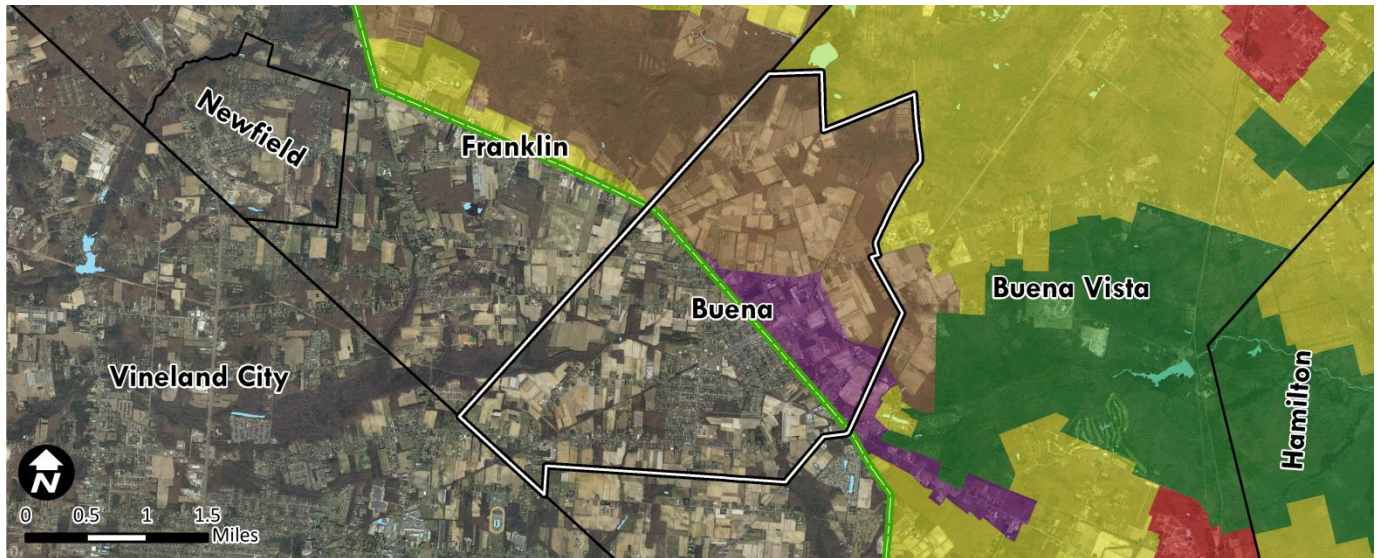
The assessment class proportions bar graph is representative of the percentage that each category makes up of the total municipal valuation.



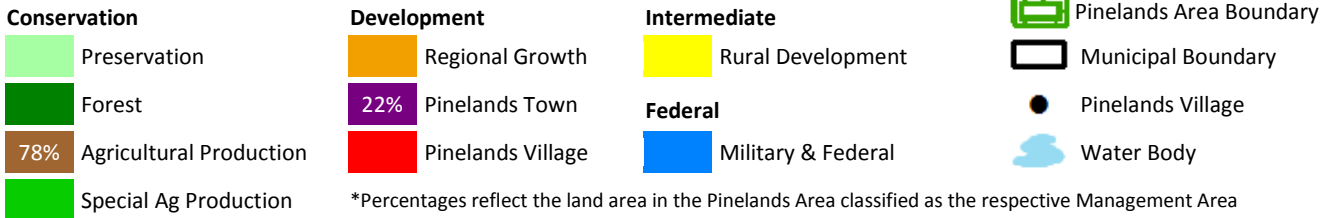
# Buena Borough

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

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

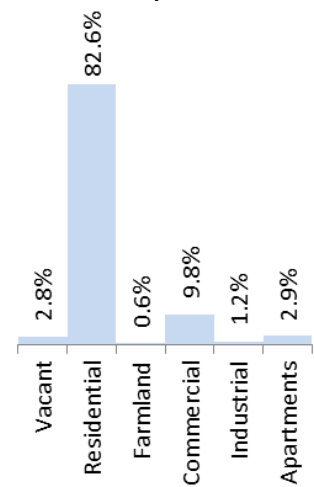


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,565	12,031	118
Population Density (per mile <sup>2</sup> )	604	1,773	126
Population Change - 2000 to 2012	17.9%	4.9%	31
% Land Protected in Pinelands Area*	21.1%	36.4%	34
Assessed Acres of Farmland	2,305	2,285	59
Building Permits Issued	1	22	146
Housing Transactions	11	62	141
Average Home Sale Price	\$162,027	\$273,524	150
Equalized Property Value (millions)	\$294.7	\$1,566.4	143
Effective Tax Rate	2.59	2.28	75
Average Residential Property Tax Bill	\$4,604	\$5,601	132
Per Capita Income Estimate	\$22,957	\$31,778	174
Unemployment Rate	15.1%	11.0%	32

Assessment Class Proportions in 2012 Municipal Valuations

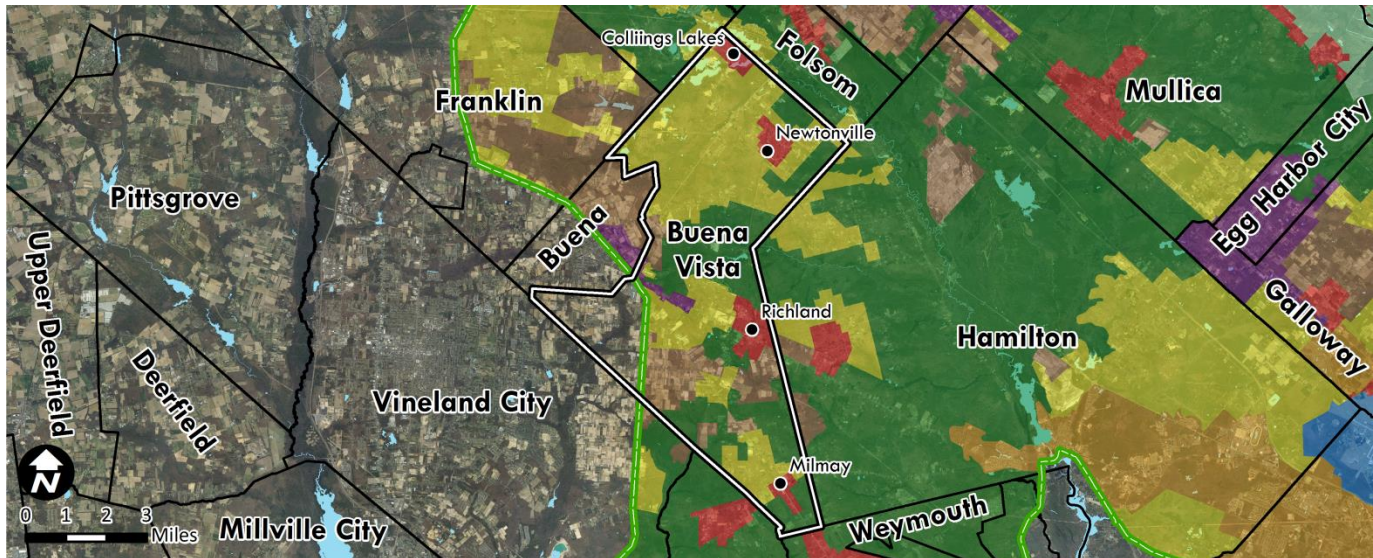


Private Sector Employment 715	Private Sector Establishments 91	Private Sector Avg. Annual Wages \$43,869
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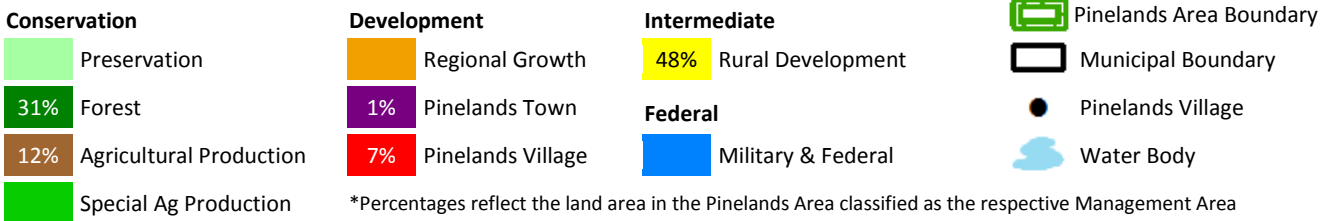
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Buena Vista Township

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

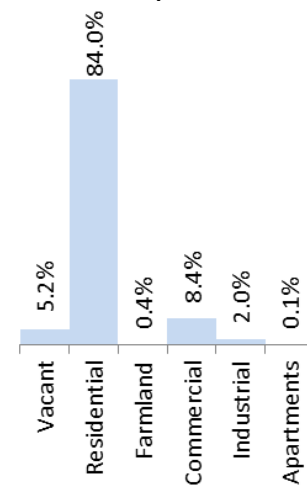


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,577	12,031	91
Population Density (per mile <sup>2</sup> )	182	1,773	170
Population Change - 2000 to 2012	1.9%	4.9%	98
% Land Protected in Pinelands Area*	15.8%	36.4%	36
Assessed Acres of Farmland	3,641	2,285	50
Building Permits Issued	4	22	114
Housing Transactions	3	62	179
Average Home Sale Price	\$142,333	\$273,524	174
Equalized Property Value (millions)	\$639.2	\$1,566.4	108
Effective Tax Rate	2.16	2.28	121
Average Residential Property Tax Bill	\$4,399	\$5,601	151
Per Capita Income Estimate	\$22,912	\$31,778	175
Unemployment Rate	11.1%	11.0%	86

Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
930	74	\$42,119

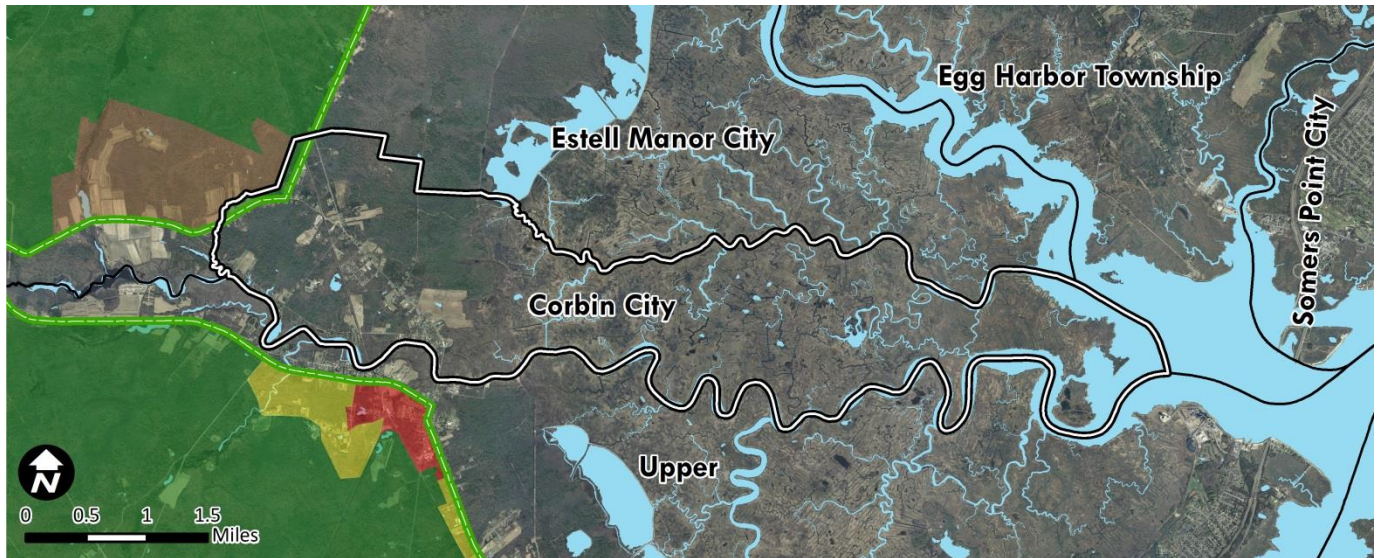
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Corbin City

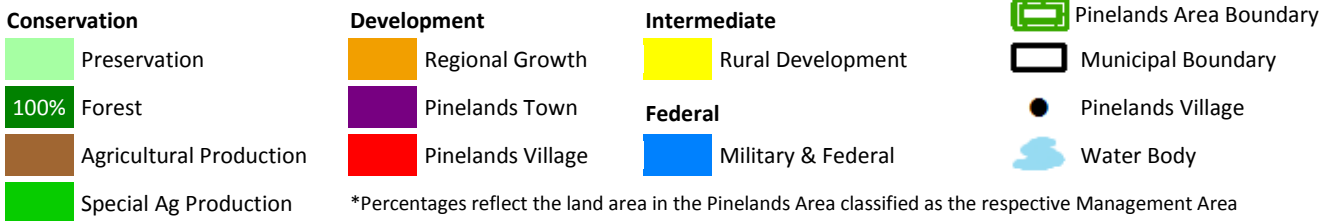


Pinelands Area 2010 population: 0 (0% of total population)

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

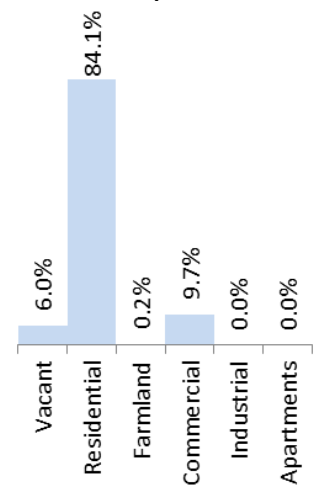


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	502	12,031	197
Population Density (per mile <sup>2</sup> )	57	1,773	192
Population Change - 2000 to 2012	7.3%	4.9%	65
% Land Protected in Pinelands Area*	9.4%	36.4%	39
Assessed Acres of Farmland	161	2,285	99
Building Permits Issued	1	22	146
Housing Transactions	2	62	187
Average Home Sale Price	\$322,500	\$273,524	35
Equalized Property Value (millions)	\$55.4	\$1,566.4	195
Effective Tax Rate	1.35	2.28	176
Average Residential Property Tax Bill	\$3,385	\$5,601	192
Per Capita Income Estimate	\$25,944	\$31,778	150
Unemployment Rate	9.8%	11.0%	113

Assessment Class Proportions in 2012 Municipal Valuations

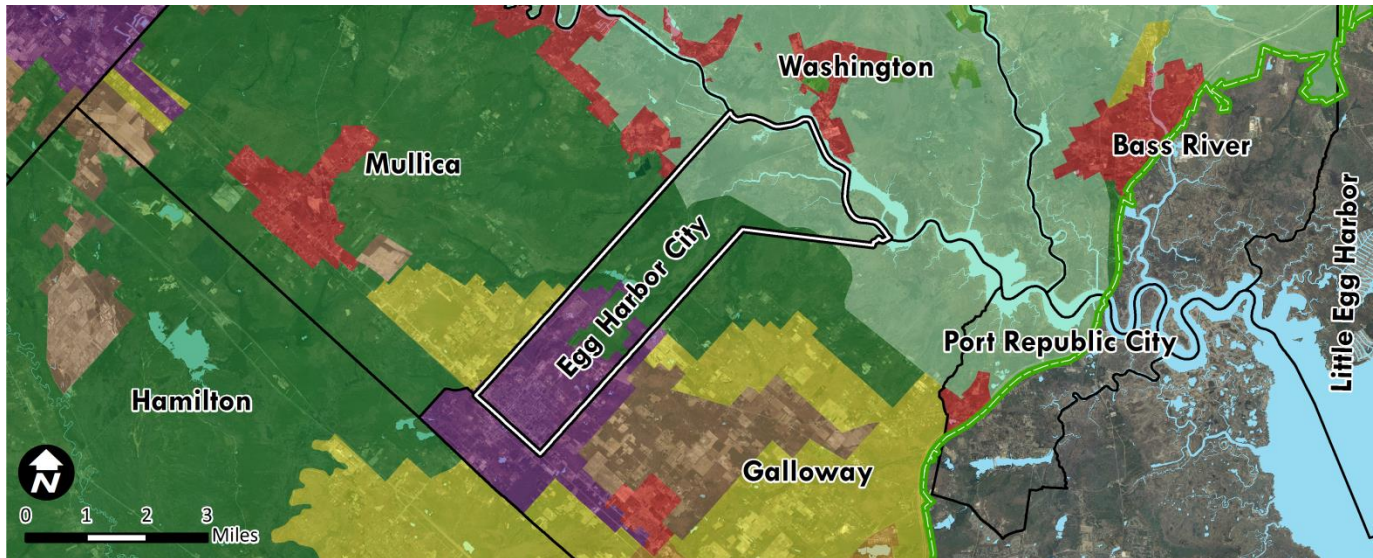


Private Sector Employment 41	Private Sector Establishments 11	Private Sector Avg. Annual Wages \$18,271
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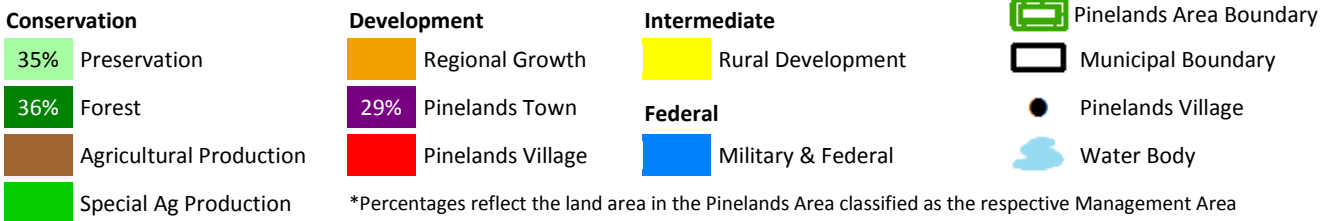
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Egg Harbor City

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

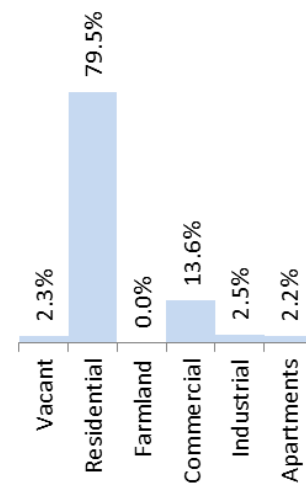


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,299	12,031	121
Population Density (per mile <sup>2</sup> )	373	1,773	144
Population Change - 2000 to 2012	-5.4%	4.9%	165
% Land Protected in Pinelands Area*	2.1%	36.4%	43
Assessed Acres of Farmland	0	2,285	122
Building Permits Issued	13	22	67
Housing Transactions	4	62	173
Average Home Sale Price	\$146,750	\$273,524	171
Equalized Property Value (millions)	\$252.2	\$1,566.4	154
Effective Tax Rate	3.44	2.28	15
Average Residential Property Tax Bill	\$5,650	\$5,601	83
Per Capita Income Estimate	\$19,122	\$31,778	194
Unemployment Rate	19.8%	11.0%	9

Assessment Class Proportions in 2012 Municipal Valuations



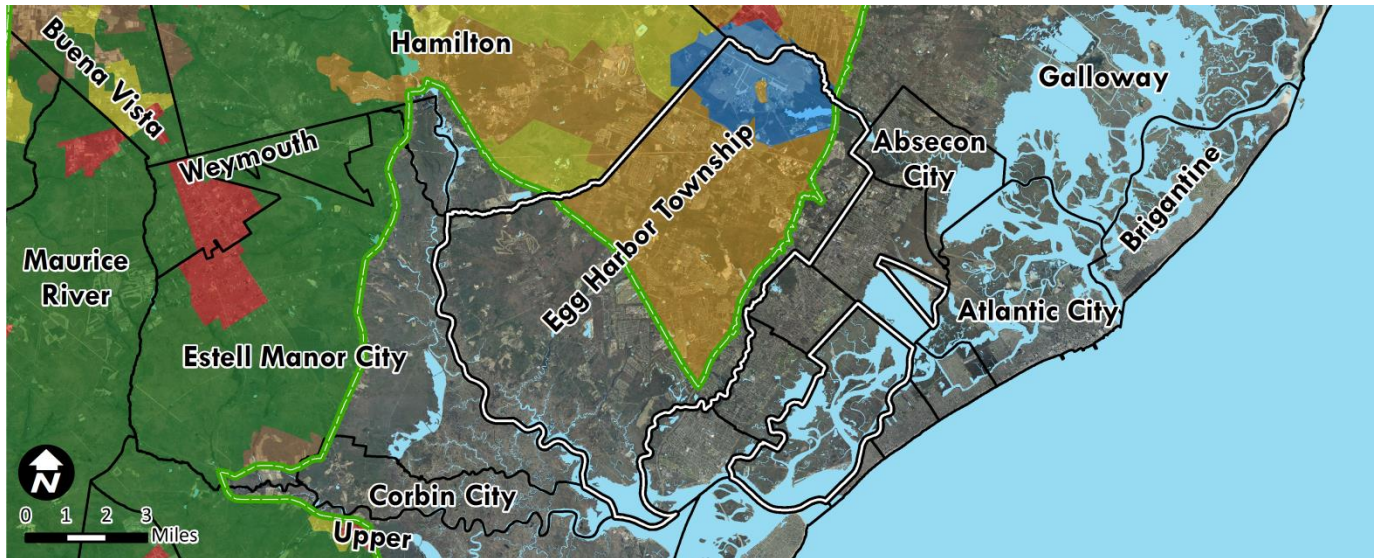
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
2,521	223	\$32,450

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

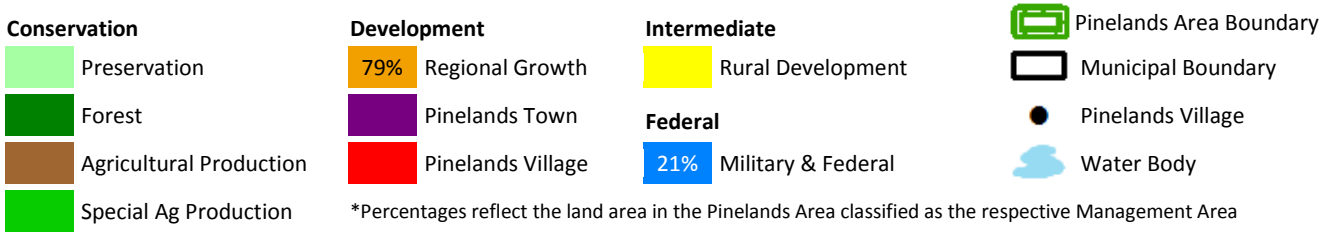
# Egg Harbor Township

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

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

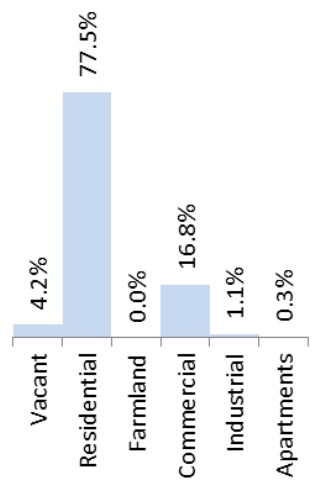


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	43,628	12,031	11
Population Density (per mile <sup>2</sup> )	690	1,773	121
Population Change - 2000 to 2012	42.0%	4.9%	9
% Land Protected in Pinelands Area*	1.0%	36.4%	44
Assessed Acres of Farmland	2,118	2,285	61
Building Permits Issued	81	22	12
Housing Transactions	258	62	11
Average Home Sale Price	\$216,837	\$273,524	91
Equalized Property Value (millions)	\$4,233.4	\$1,566.4	16
Effective Tax Rate	2.44	2.28	89
Average Residential Property Tax Bill	\$5,806	\$5,601	74
Per Capita Income Estimate	\$28,260	\$31,778	119
Unemployment Rate	12.2%	11.0%	66

## Assessment Class Proportions in 2012 Municipal Valuations



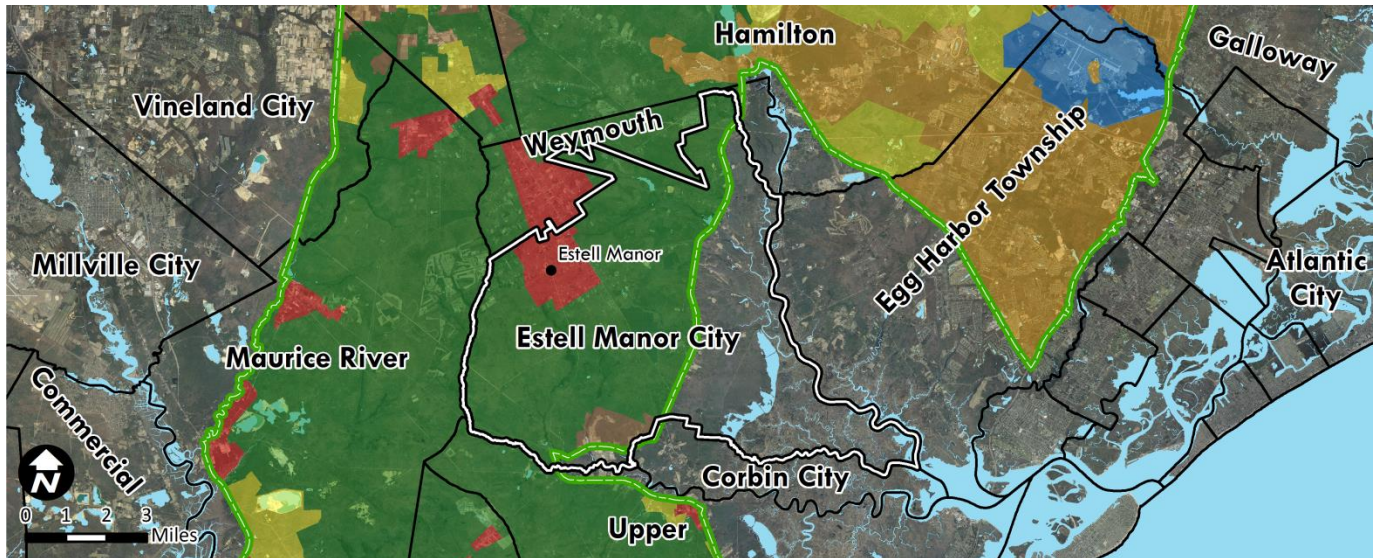
Private Sector Employment 11,813	Private Sector Establishments 863	Private Sector Avg. Annual Wages \$45,555
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

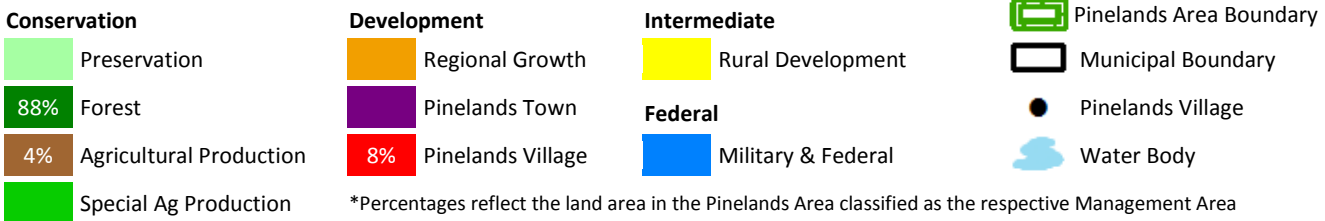


# Estell Manor City

Pinelands Area 2010 population: 1,629 (94% of total population)  
 Pinelands Area acreage: 22,423 (63% of total acreage)

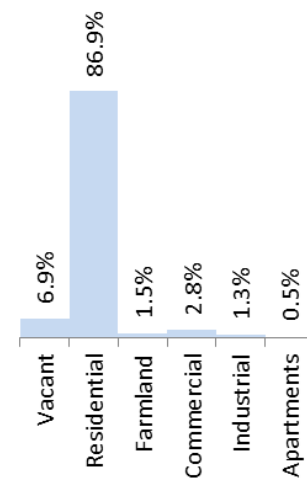


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,734	12,031	167
Population Density (per mile <sup>2</sup> )	31	1,773	196
Population Change - 2000 to 2012	9.4%	4.9%	55
% Land Protected in Pinelands Area*	54.8%	36.4%	15
Assessed Acres of Farmland	9,647	2,285	14
Building Permits Issued	2	22	134
Housing Transactions	8	62	153
Average Home Sale Price	\$165,863	\$273,524	146
Equalized Property Value (millions)	\$176.6	\$1,566.4	175
Effective Tax Rate	1.84	2.28	148
Average Residential Property Tax Bill	\$3,889	\$5,601	174
Per Capita Income Estimate	\$27,526	\$31,778	127
Unemployment Rate	14.8%	11.0%	35

## Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
129	31	\$34,917

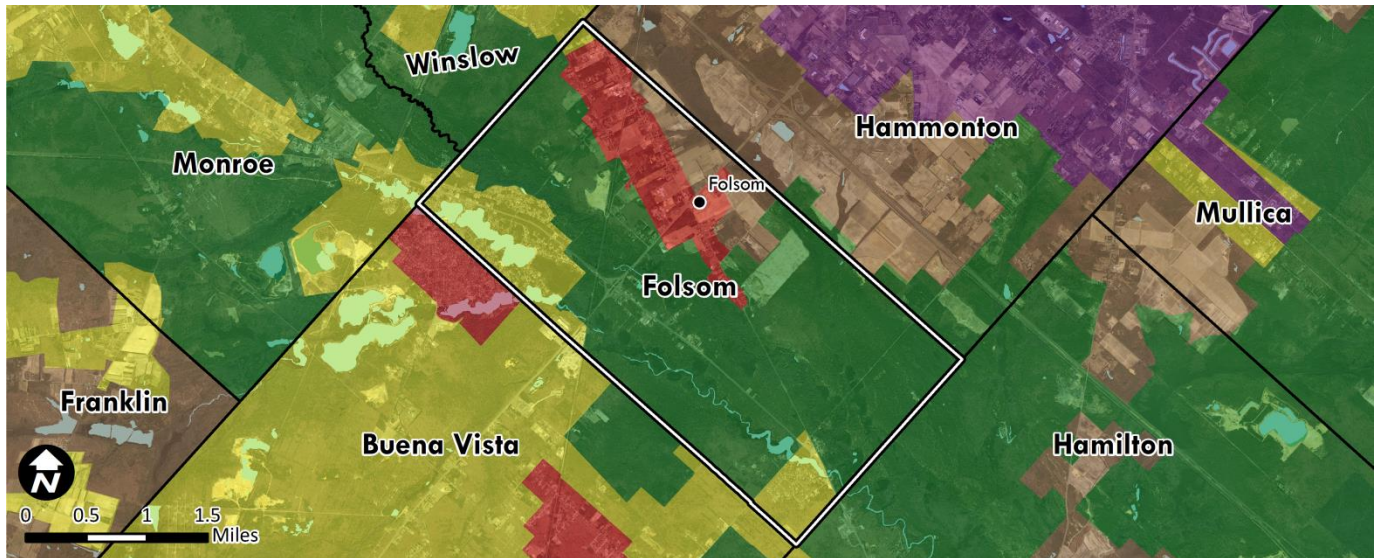
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Folsom Borough

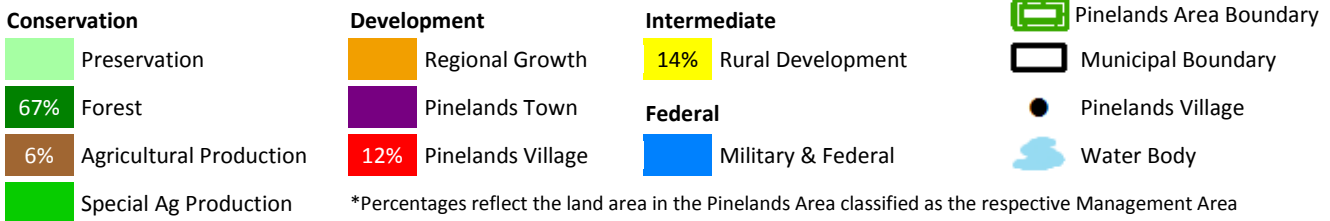


Pinelands Area 2010 population: 1,885 (100% of total population)

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

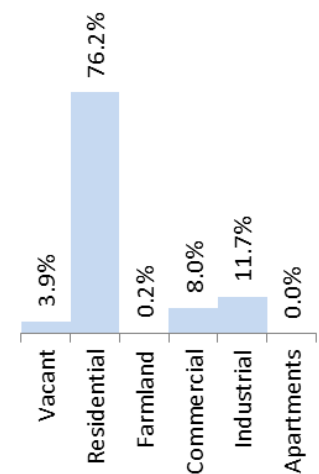


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,873	12,031	162
Population Density (per mile <sup>2</sup> )	221	1,773	164
Population Change - 2000 to 2012	-5.0%	4.9%	163
% Land Protected in Pinelands Area*	16.2%	36.4%	35
Assessed Acres of Farmland	721	2,285	79
Building Permits Issued	2	22	134
Housing Transactions	6	62	160
Average Home Sale Price	\$183,583	\$273,524	121
Equalized Property Value (millions)	\$179.8	\$1,566.4	174
Effective Tax Rate	1.61	2.28	162
Average Residential Property Tax Bill	\$3,457	\$5,601	189
Per Capita Income Estimate	\$26,582	\$31,778	143
Unemployment Rate	6.4%	11.0%	183

Assessment Class Proportions in 2012 Municipal Valuations

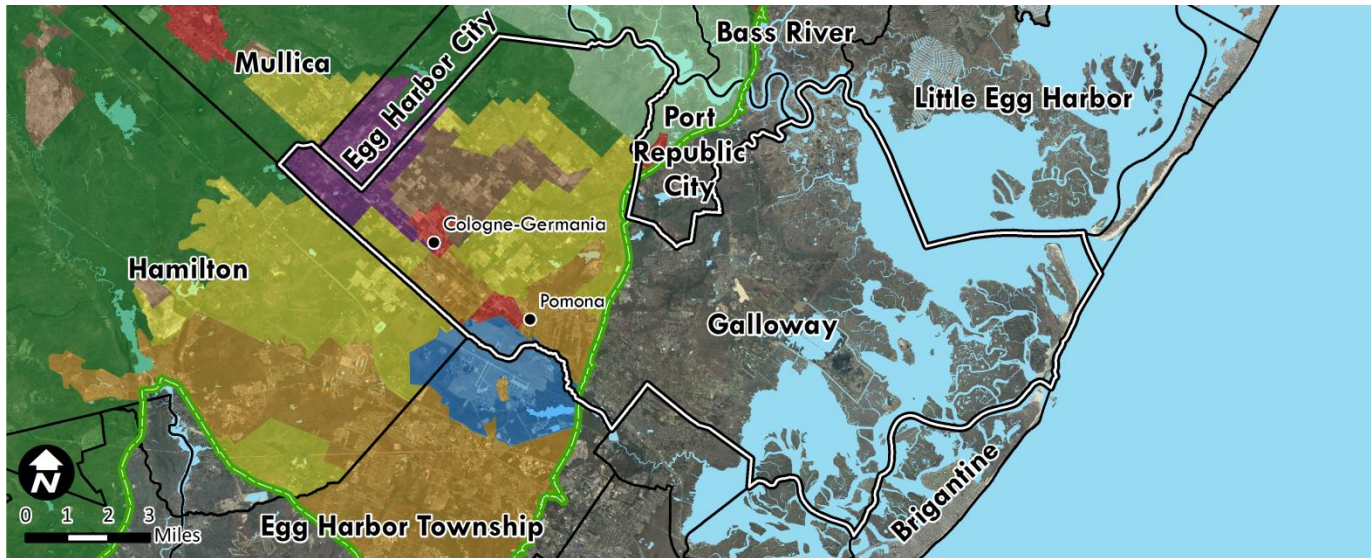


Private Sector Employment 711	Private Sector Establishments 39	Private Sector Avg. Annual Wages \$70,947
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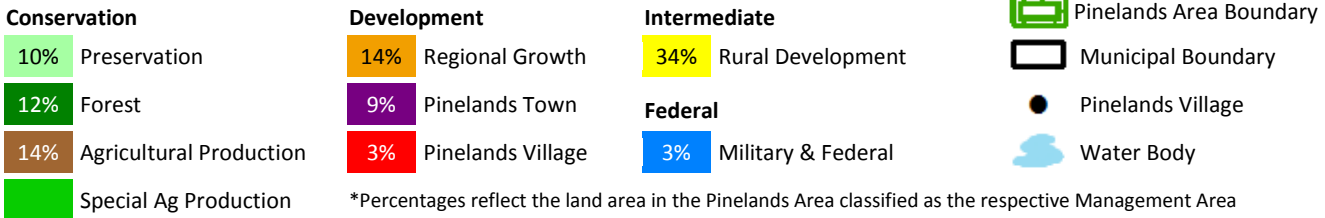
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Galloway Township

Pinelands Area 2010 population: 14,945 (40% of total population)  
 Pinelands Area acreage: 27,005 (38% of total acreage)

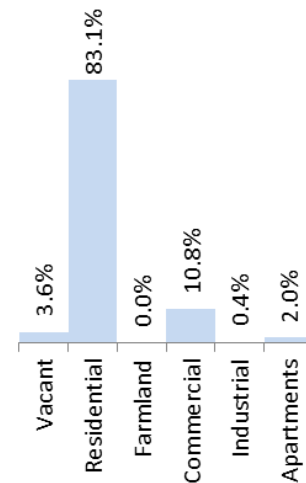


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	37,318	12,031	17
Population Density (per mile <sup>2</sup> )	338	1,773	149
Population Change - 2000 to 2012	19.6%	4.9%	29
% Land Protected in Pinelands Area*	13.8%	36.4%	37
Assessed Acres of Farmland	2,400	2,285	56
Building Permits Issued	32	22	42
Housing Transactions	209	62	16
Average Home Sale Price	\$199,843	\$273,524	109
Equalized Property Value (millions)	\$3,253.9	\$1,566.4	28
Effective Tax Rate	2.19	2.28	115
Average Residential Property Tax Bill	\$4,598	\$5,601	133
Per Capita Income Estimate	\$29,912	\$31,778	101
Unemployment Rate	12.2%	11.0%	67

Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment 7,819	Private Sector Establishments 502	Private Sector Avg. Annual Wages \$40,639
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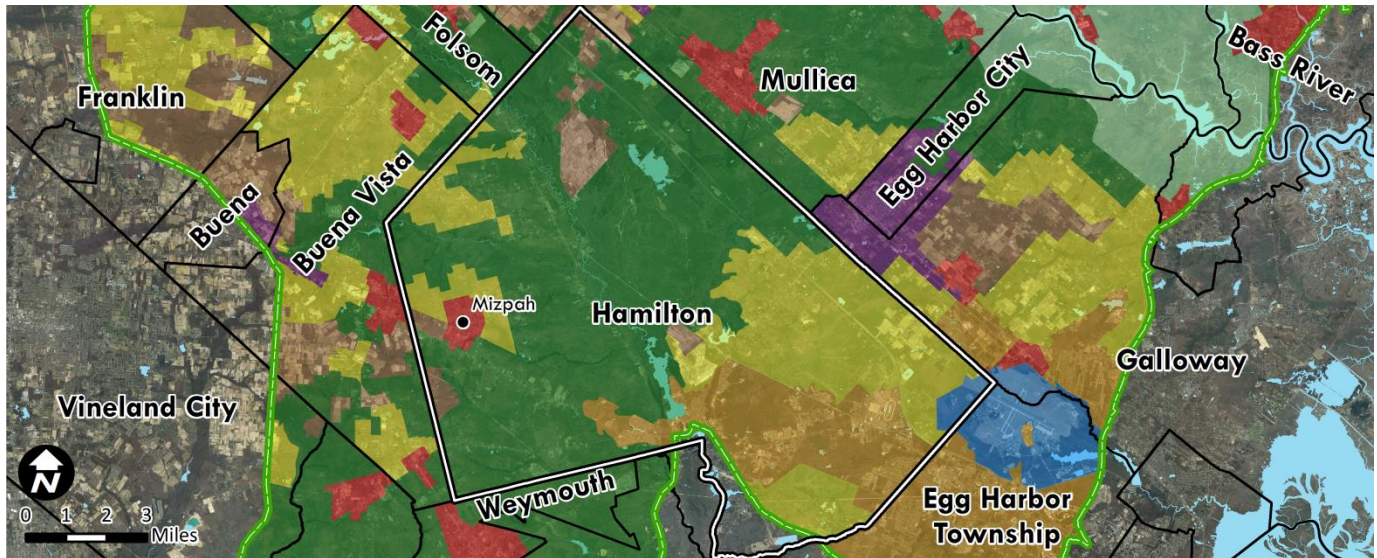
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Hamilton Township

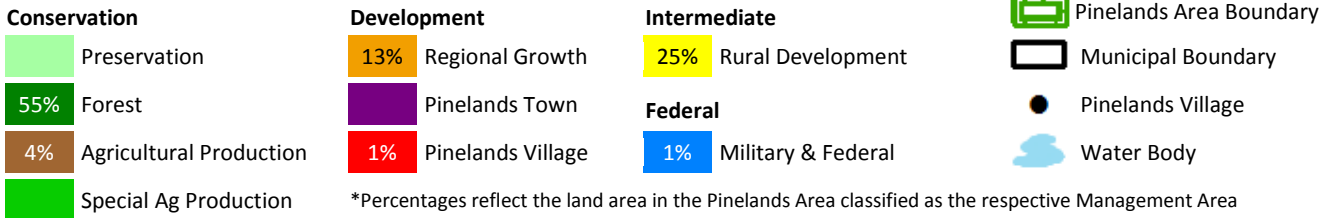


Pinelands Area 2010 population: 24,954 (94% of total population)

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

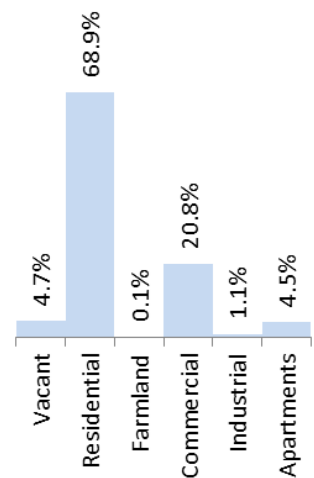


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	26,728	12,031	27
Population Density (per mile <sup>2</sup> )	237	1,773	159
Population Change - 2000 to 2012	30.4%	4.9%	16
% Land Protected in Pinelands Area*	36.0%	36.4%	26
Assessed Acres of Farmland	6,368	2,285	33
Building Permits Issued	5	22	108
Housing Transactions	114	62	33
Average Home Sale Price	\$197,152	\$273,524	111
Equalized Property Value (millions)	\$2,440.9	\$1,566.4	40
Effective Tax Rate	2.31	2.28	106
Average Residential Property Tax Bill	\$4,418	\$5,601	150
Per Capita Income Estimate	\$26,571	\$31,778	144
Unemployment Rate	12.9%	11.0%	56

Assessment Class Proportions in 2012 Municipal Valuations

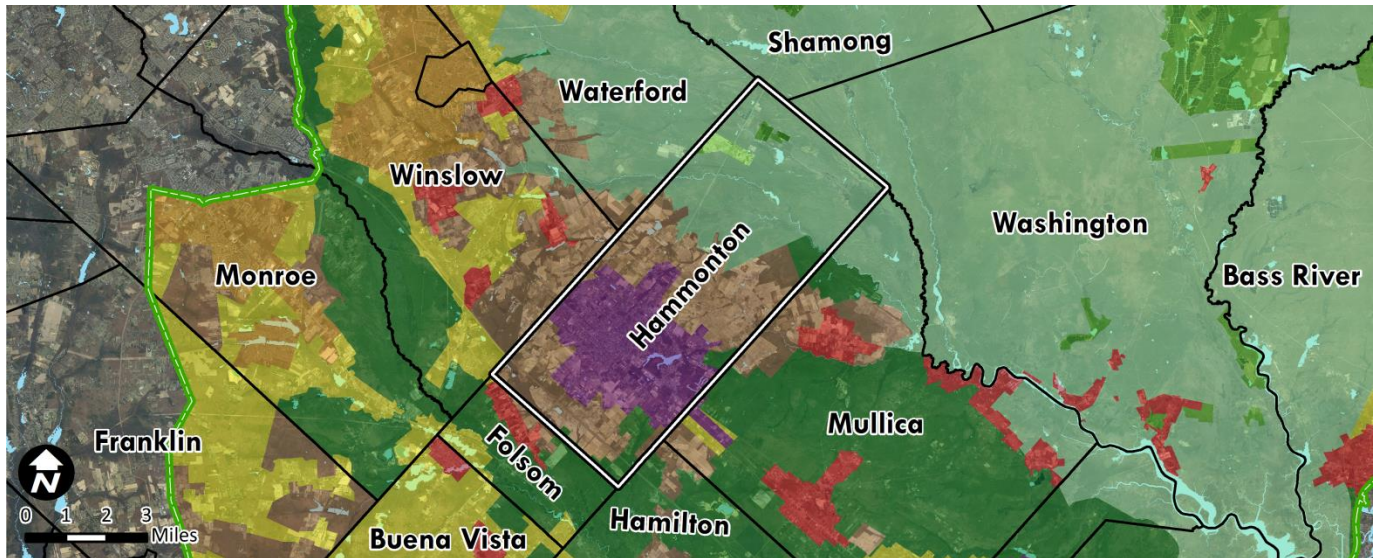


Private Sector Employment 7,208	Private Sector Establishments 531	Private Sector Avg. Annual Wages \$28,600
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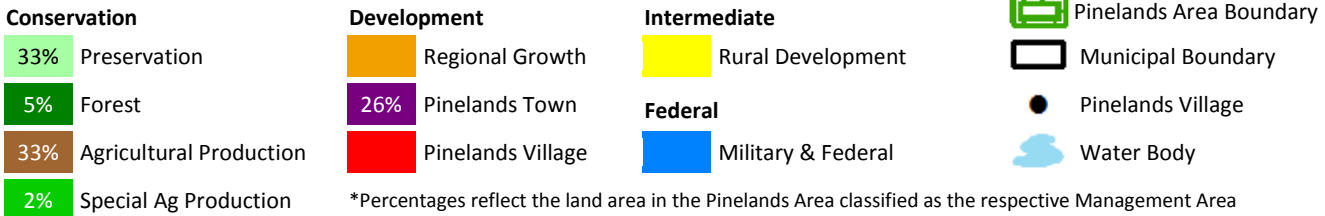
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Hammonton Town

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

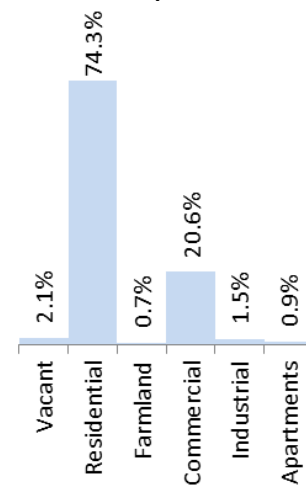


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	14,751	12,031	46
Population Density (per mile <sup>2</sup> )	355	1,773	146
Population Change - 2000 to 2012	17.0%	4.9%	34
% Land Protected in Pinelands Area*	49.2%	36.4%	21
Assessed Acres of Farmland	6,609	2,285	30
Building Permits Issued	15	22	64
Housing Transactions	54	62	63
Average Home Sale Price	\$226,681	\$273,524	81
Equalized Property Value (millions)	\$1,372.3	\$1,566.4	64
Effective Tax Rate	2.07	2.28	131
Average Residential Property Tax Bill	\$4,722	\$5,601	129
Per Capita Income Estimate	\$25,434	\$31,778	152
Unemployment Rate	16.8%	11.0%	18

Assessment Class Proportions in 2012 Municipal Valuations

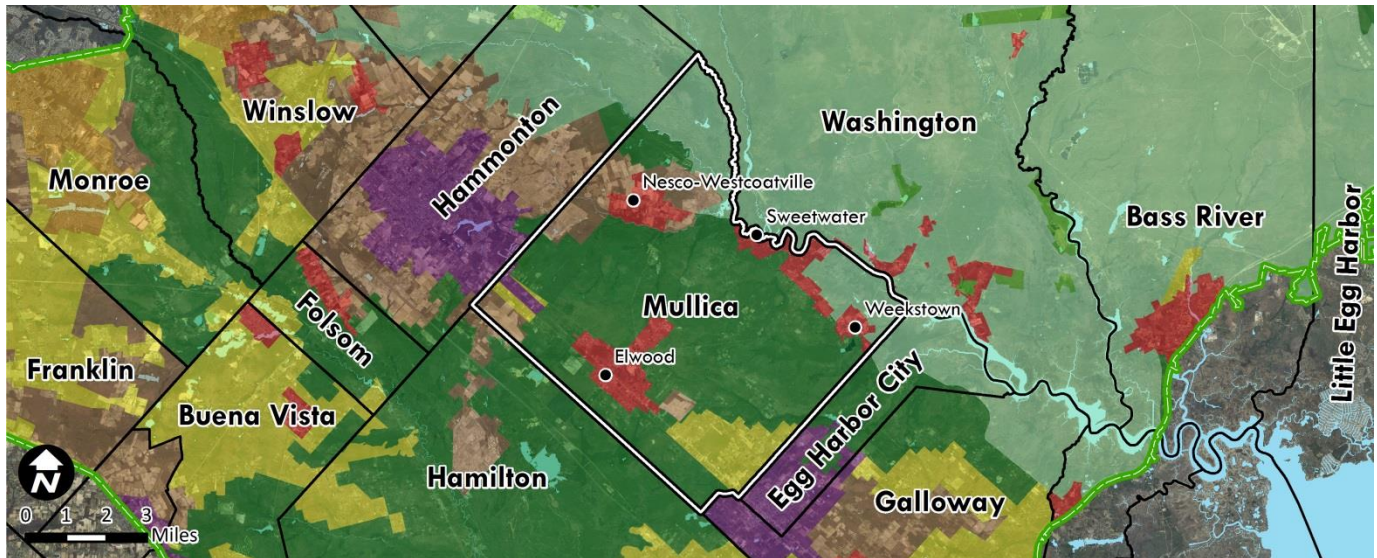


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
7,539	586	\$37,433

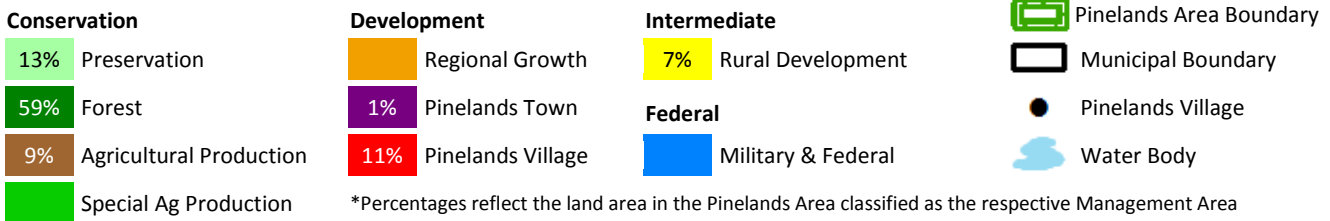
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Mullica Township

Pinelands Area 2010 population: 6,041 (100% of total population)  
 Pinelands Area acreage: 36,406 (100% of total acreage)

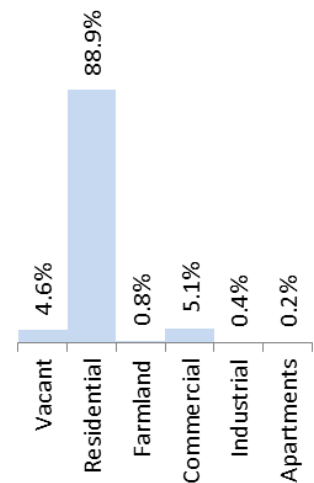


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,190	12,031	102
Population Density (per mile <sup>2</sup> )	109	1,773	182
Population Change - 2000 to 2012	4.7%	4.9%	76
% Land Protected in Pinelands Area*	30.4%	36.4%	30
Assessed Acres of Farmland	6,416	2,285	31
Building Permits Issued	16	22	60
Housing Transactions	33	62	91
Average Home Sale Price	\$200,492	\$273,524	108
Equalized Property Value (millions)	\$529.8	\$1,566.4	116
Effective Tax Rate	2.00	2.28	134
Average Residential Property Tax Bill	\$4,549	\$5,601	137
Per Capita Income Estimate	\$26,613	\$31,778	142
Unemployment Rate	13.6%	11.0%	49

Assessment Class Proportions in 2012 Municipal Valuations

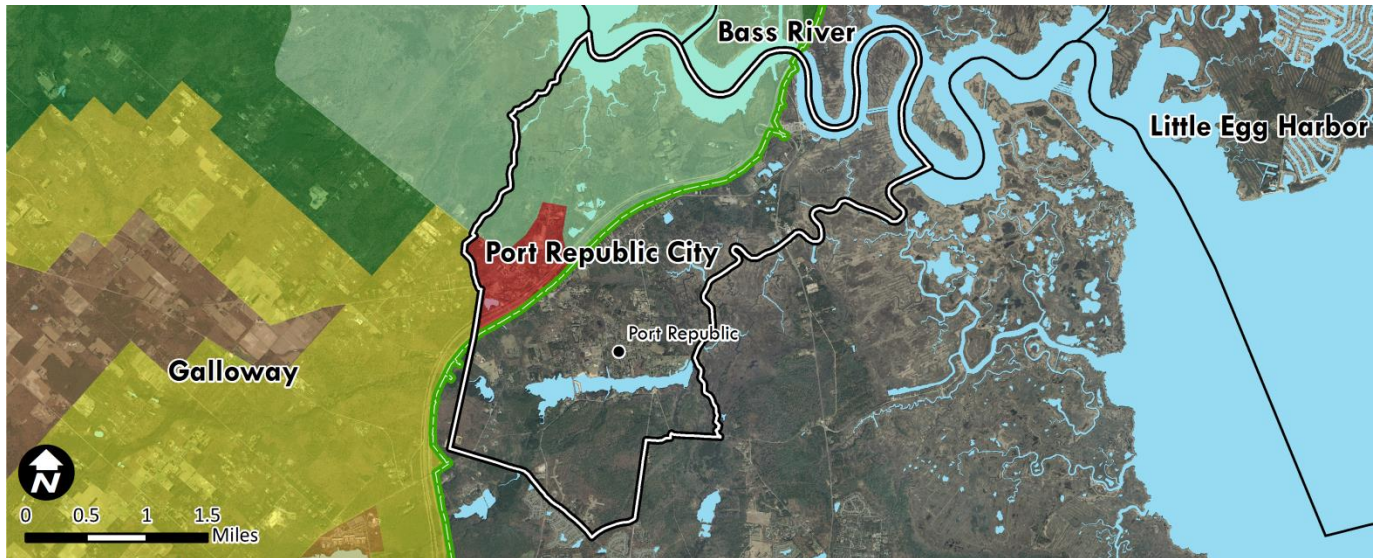


Private Sector Employment 132	Private Sector Establishments 30	Private Sector Avg. Annual Wages \$26,588
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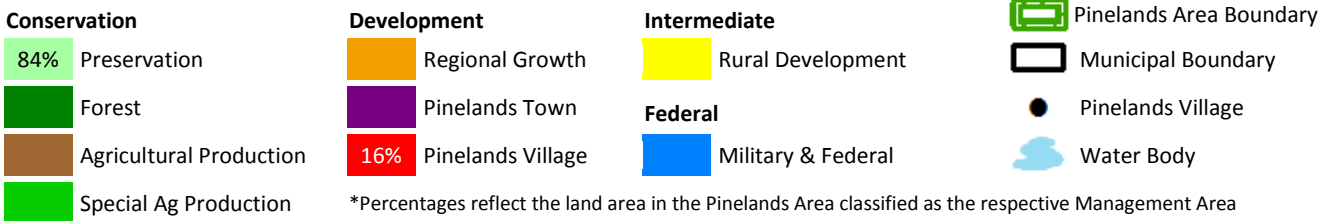
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Port Republic City

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

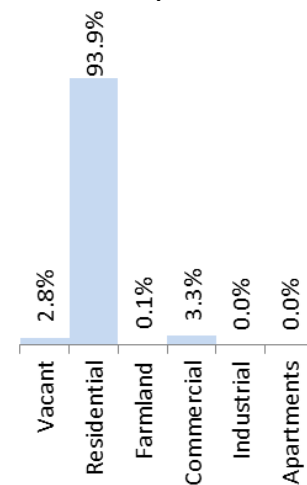


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,114	12,031	182
Population Density (per mile <sup>2</sup> )	131	1,773	177
Population Change - 2000 to 2012	7.4%	4.9%	64
% Land Protected in Pinelands Area*	36.5%	36.4%	25
Assessed Acres of Farmland	147	2,285	101
Building Permits Issued	3	22	122
Housing Transactions	5	62	166
Average Home Sale Price	\$324,500	\$273,524	34
Equalized Property Value (millions)	\$135.4	\$1,566.4	181
Effective Tax Rate	1.83	2.28	150
Average Residential Property Tax Bill	\$5,168	\$5,601	108
Per Capita Income Estimate	\$36,128	\$31,778	50
Unemployment Rate	8.0%	11.0%	153

Assessment Class Proportions in 2012 Municipal Valuations



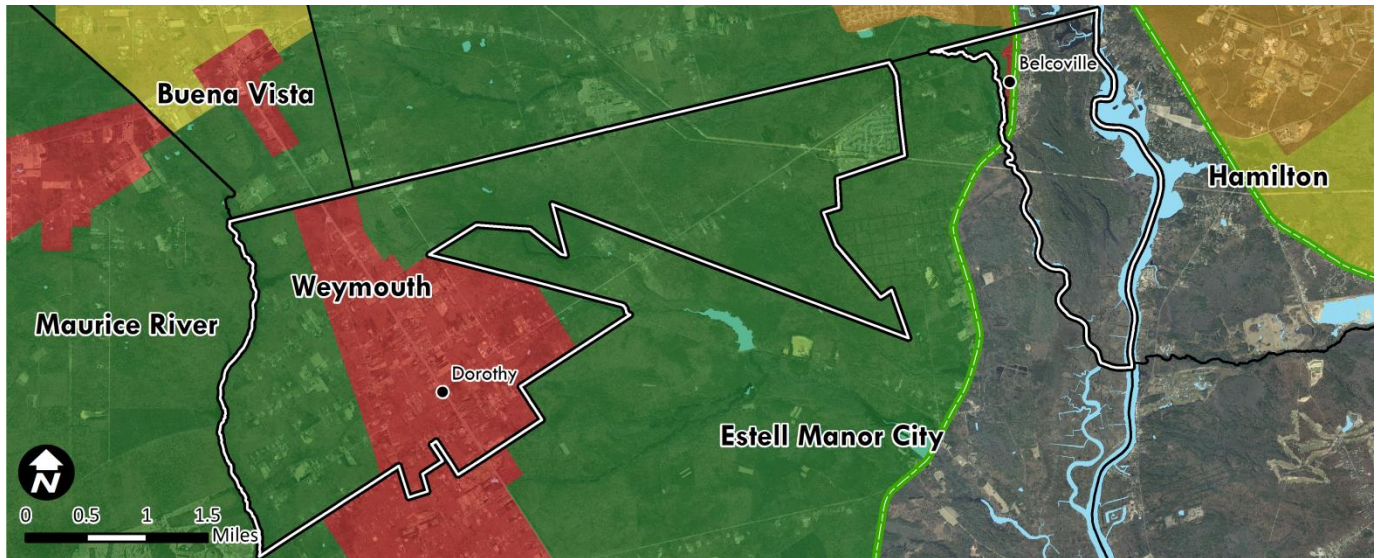
Private Sector Employment 70	Private Sector Establishments 13	Private Sector Avg. Annual Wages \$19,300
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

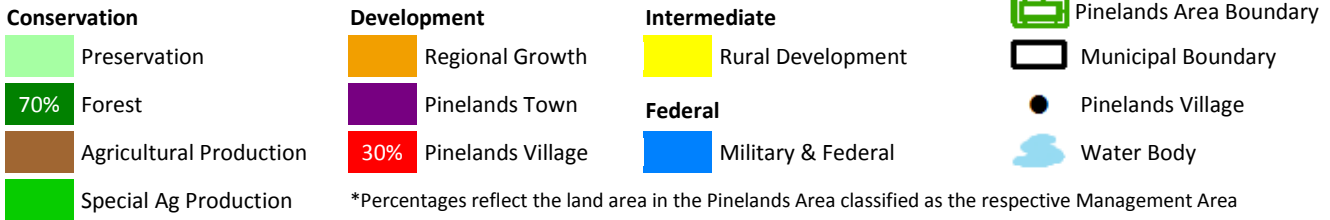
# Weymouth Township

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

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

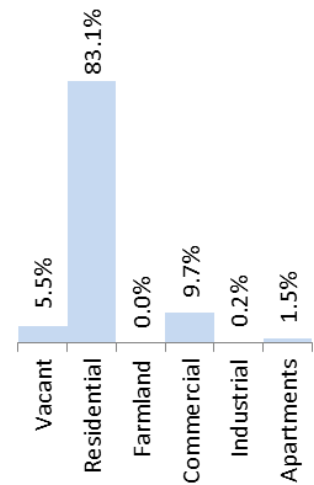


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,717	12,031	149
Population Density (per mile <sup>2</sup> )	225	1,773	163
Population Change - 2000 to 2012	20.4%	4.9%	26
% Land Protected in Pinelands Area*	6.5%	36.4%	41
Assessed Acres of Farmland	15	2,285	118
Building Permits Issued	1	22	146
Housing Transactions	3	62	179
Average Home Sale Price	\$171,833	\$273,524	139
Equalized Property Value (millions)	\$160.7	\$1,566.4	179
Effective Tax Rate	1.93	2.28	139
Average Residential Property Tax Bill	\$4,096	\$5,601	166
Per Capita Income Estimate	\$26,268	\$31,778	148
Unemployment Rate	8.3%	11.0%	143

Assessment Class Proportions in 2012 Municipal Valuations



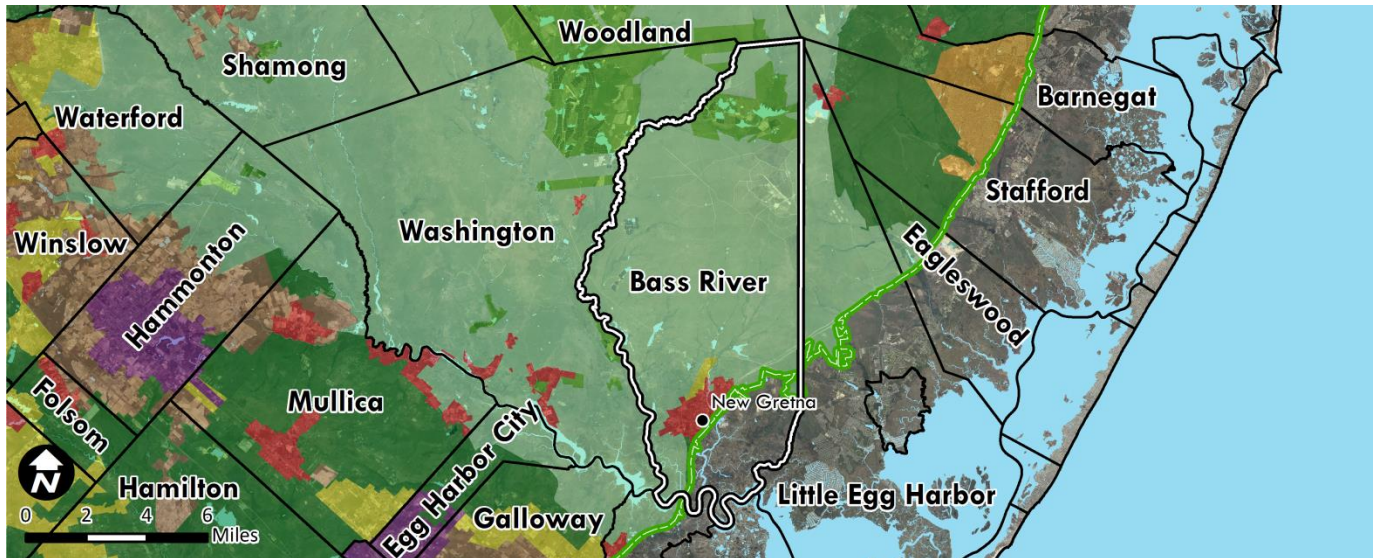
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
124	23	\$44,768

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

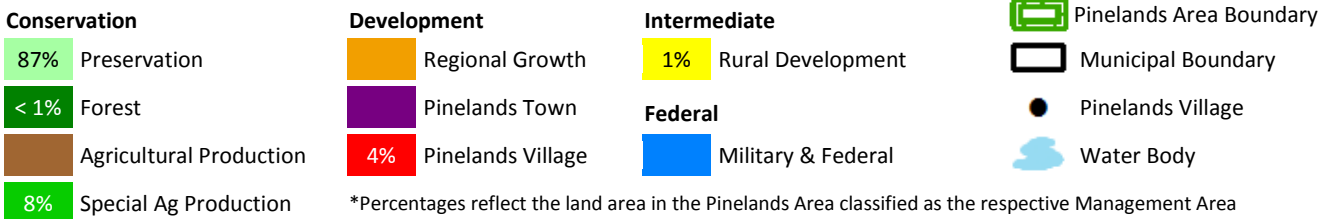


# Bass River Township

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

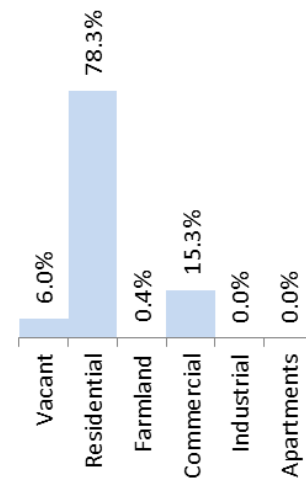


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,440	12,031	174
Population Density (per mile <sup>2</sup> )	18	1,773	199
Population Change - 2000 to 2012	-4.6%	4.9%	160
% Land Protected in Pinelands Area*	50.6%	36.4%	18
Assessed Acres of Farmland	6,878	2,285	26
Building Permits Issued	0	22	169
Housing Transactions	4	62	173
Average Home Sale Price	\$166,875	\$273,524	144
Equalized Property Value (millions)	\$182.7	\$1,566.4	173
Effective Tax Rate	1.59	2.28	163
Average Residential Property Tax Bill	\$4,295	\$5,601	158
Per Capita Income Estimate	\$27,134	\$31,778	133
Unemployment Rate	9.4%	11.0%	124

## Assessment Class Proportions in 2012 Municipal Valuations



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

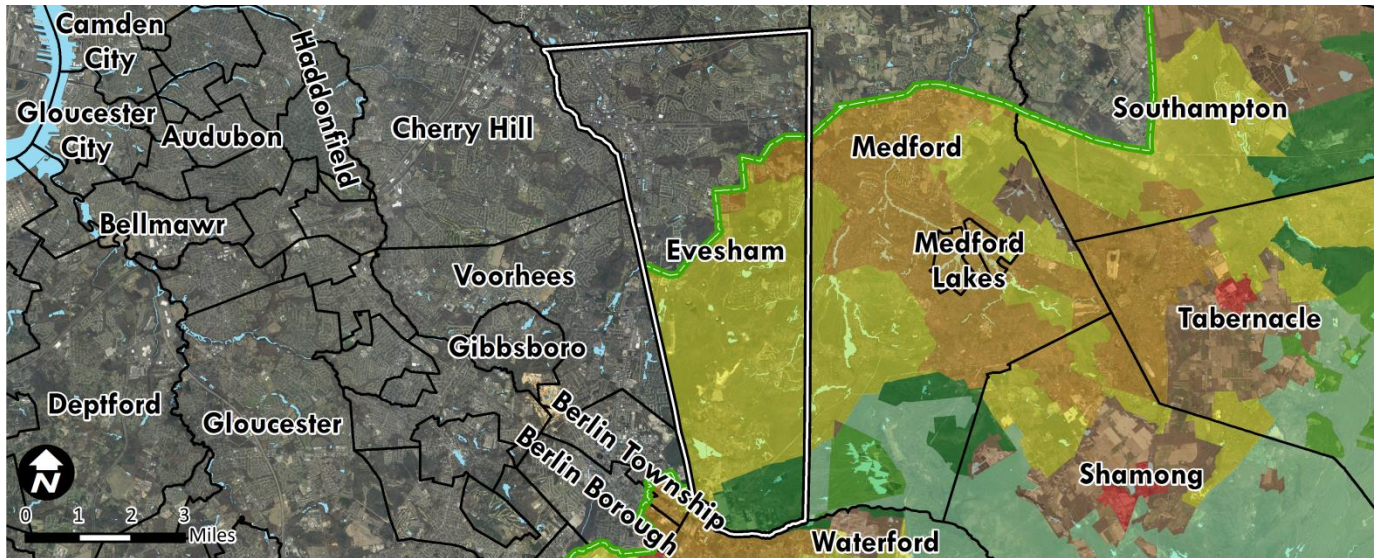
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Evesham Township

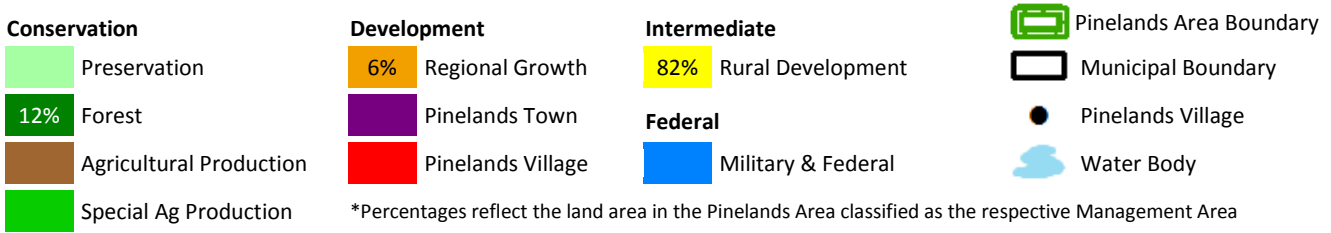


Pinelands Area 2010 population: 11,855 (26% of total population)

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

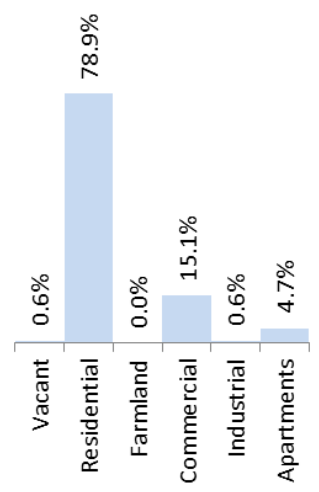


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	45,755	12,031	10
Population Density (per mile <sup>2</sup> )	1,554	1,773	87
Population Change - 2000 to 2012	8.2%	4.9%	61
% Land Protected in Pinelands Area*	29.3%	36.4%	32
Assessed Acres of Farmland	1,354	2,285	66
Building Permits Issued	101	22	9
Housing Transactions	176	62	19
Average Home Sale Price	\$282,807	\$273,524	54
Equalized Property Value (millions)	\$5,193.7	\$1,566.4	12
Effective Tax Rate	2.41	2.28	92
Average Residential Property Tax Bill	\$6,750	\$5,601	38
Per Capita Income Estimate	\$38,010	\$31,778	40
Unemployment Rate	7.5%	11.0%	163

### Assessment Class Proportions in 2012 Municipal Valuations

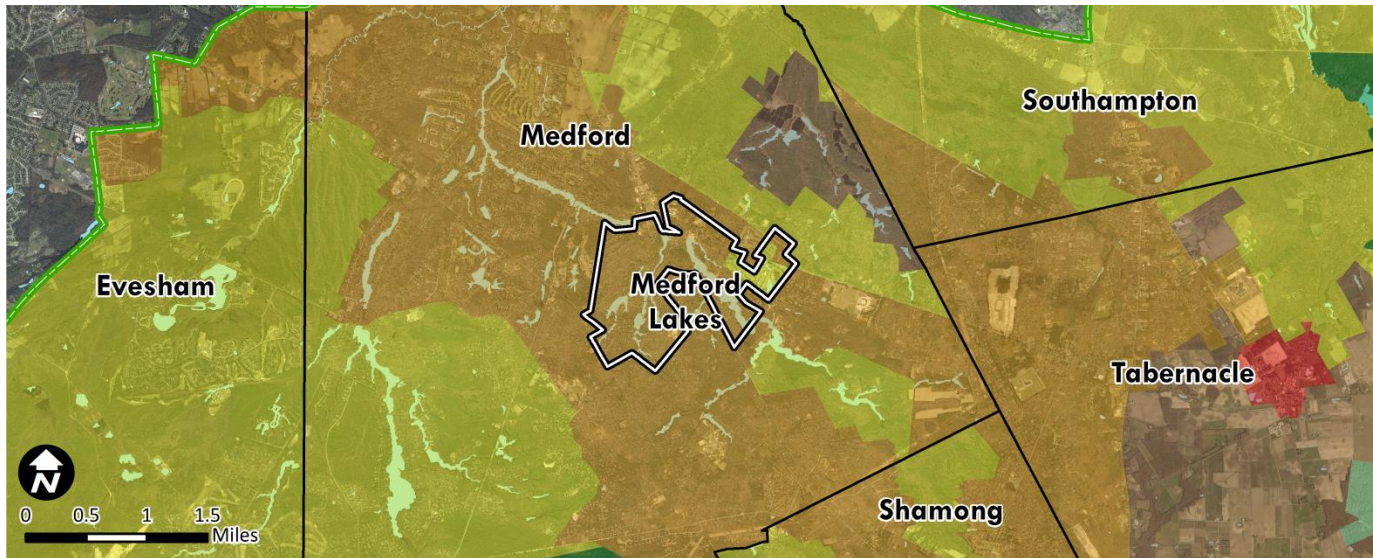


Private Sector Employment 23,319	Private Sector Establishments 1,389	Private Sector Avg. Annual Wages \$52,940
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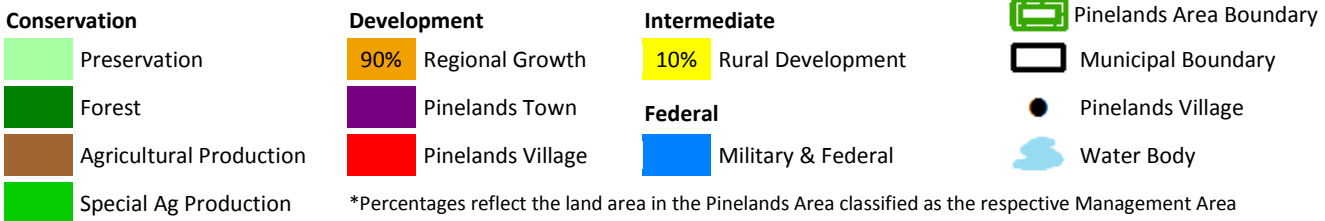
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Medford Lakes Borough

Pinelands Area 2010 population: 4,096 (100% of total population)  
 Pinelands Area acreage: 812 (100% of total acreage)

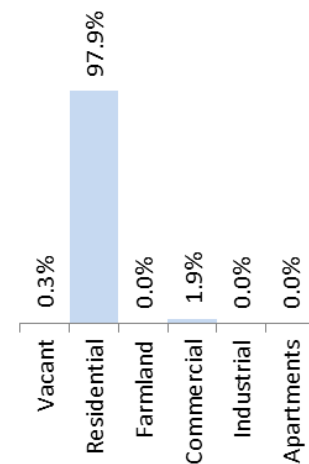


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,185	12,031	124
Population Density (per mile <sup>2</sup> )	3,299	1,773	40
Population Change - 2000 to 2012	0.3%	4.9%	116
% Land Protected in Pinelands Area*	0.0%	36.4%	46
Assessed Acres of Farmland	0	2,285	122
Building Permits Issued	7	22	91
Housing Transactions	17	62	126
Average Home Sale Price	\$296,547	\$273,524	47
Equalized Property Value (millions)	\$466.0	\$1,566.4	123
Effective Tax Rate	2.67	2.28	64
Average Residential Property Tax Bill	\$8,103	\$5,601	15
Per Capita Income Estimate	\$42,207	\$31,778	24
Unemployment Rate	4.4%	11.0%	193

## Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment 403	Private Sector Establishments 65	Private Sector Avg. Annual Wages \$52,056
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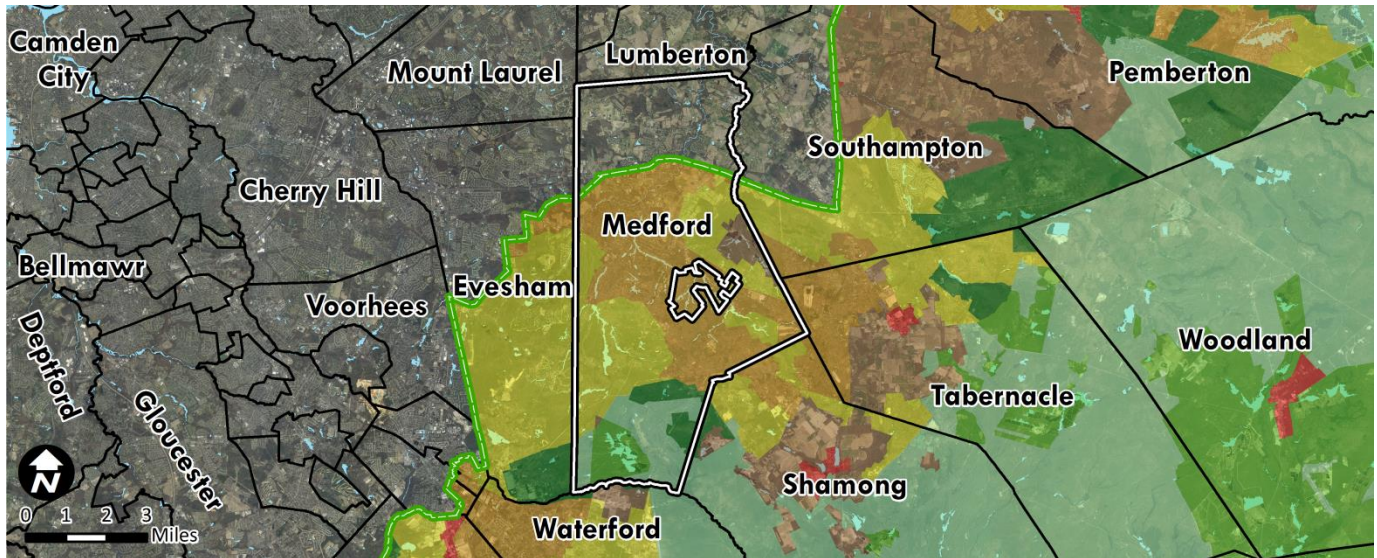
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Medford Township

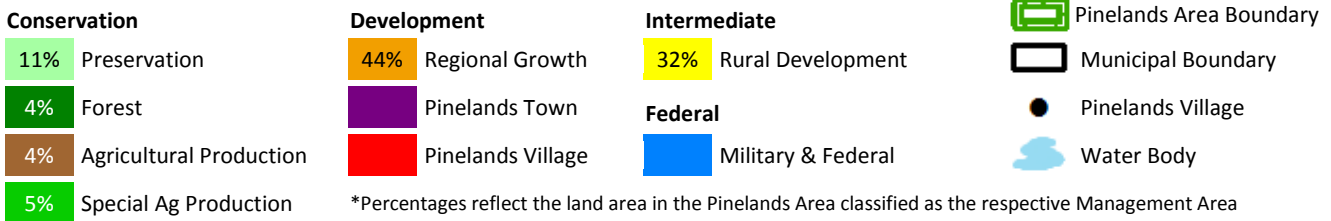


Pinelands Area 2010 population: 18,911 (82% of total population)

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

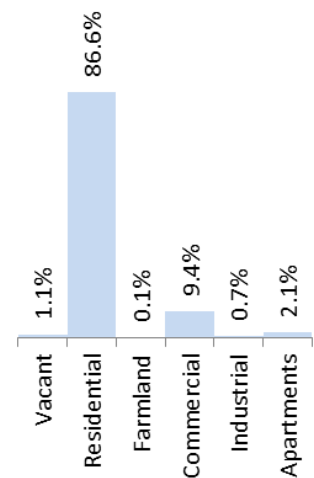


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	23,227	12,031	29
Population Density (per mile <sup>2</sup> )	583	1,773	127
Population Change - 2000 to 2012	4.4%	4.9%	80
% Land Protected in Pinelands Area*	32.1%	36.4%	27
Assessed Acres of Farmland	5,831	2,285	36
Building Permits Issued	47	22	34
Housing Transactions	49	62	70
Average Home Sale Price	\$317,841	\$273,524	36
Equalized Property Value (millions)	\$3,161.8	\$1,566.4	29
Effective Tax Rate	2.61	2.28	71
Average Residential Property Tax Bill	\$9,187	\$5,601	9
Per Capita Income Estimate	\$46,285	\$31,778	17
Unemployment Rate	5.7%	11.0%	189

Assessment Class Proportions in 2012 Municipal Valuations

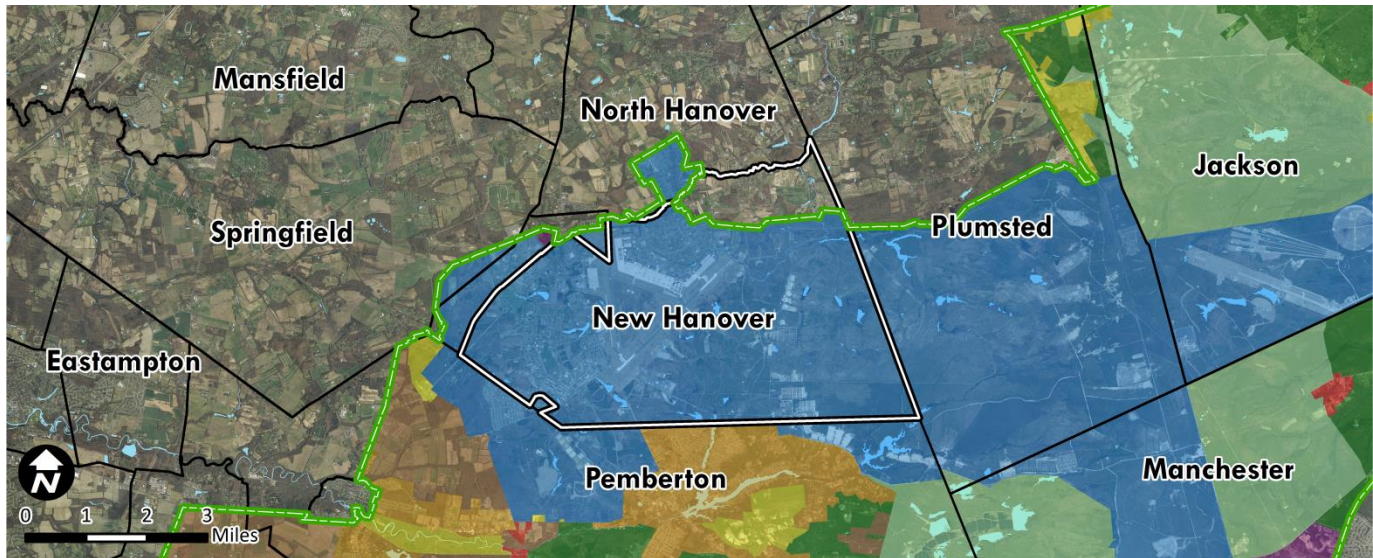


Private Sector Employment 6,278	Private Sector Establishments 769	Private Sector Avg. Annual Wages \$37,055
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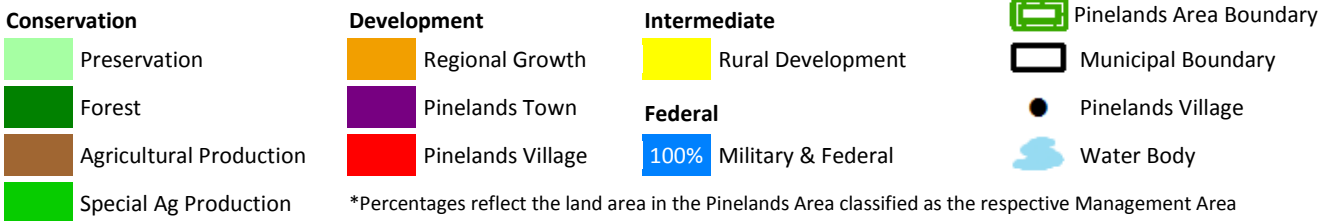
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# New Hanover Township

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

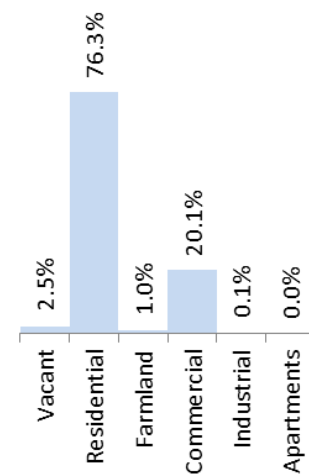


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,859	12,031	86
Population Density (per mile <sup>2</sup> )	350	1,773	148
Population Change - 2000 to 2012	-19.3%	4.9%	189
% Land Protected in Pinelands Area*	0.0%	36.4%	46
Assessed Acres of Farmland	892	2,285	73
Building Permits Issued	0	22	169
Housing Transactions	2	62	187
Average Home Sale Price	\$153,286	\$273,524	162
Equalized Property Value (millions)	\$72.2	\$1,566.4	194
Effective Tax Rate	1.55	2.28	165
Average Residential Property Tax Bill	\$4,164	\$5,601	163
Per Capita Income Estimate	\$31,371	\$31,778	88
Unemployment Rate	8.2%	11.0%	146

## Assessment Class Proportions in 2012 Municipal Valuations



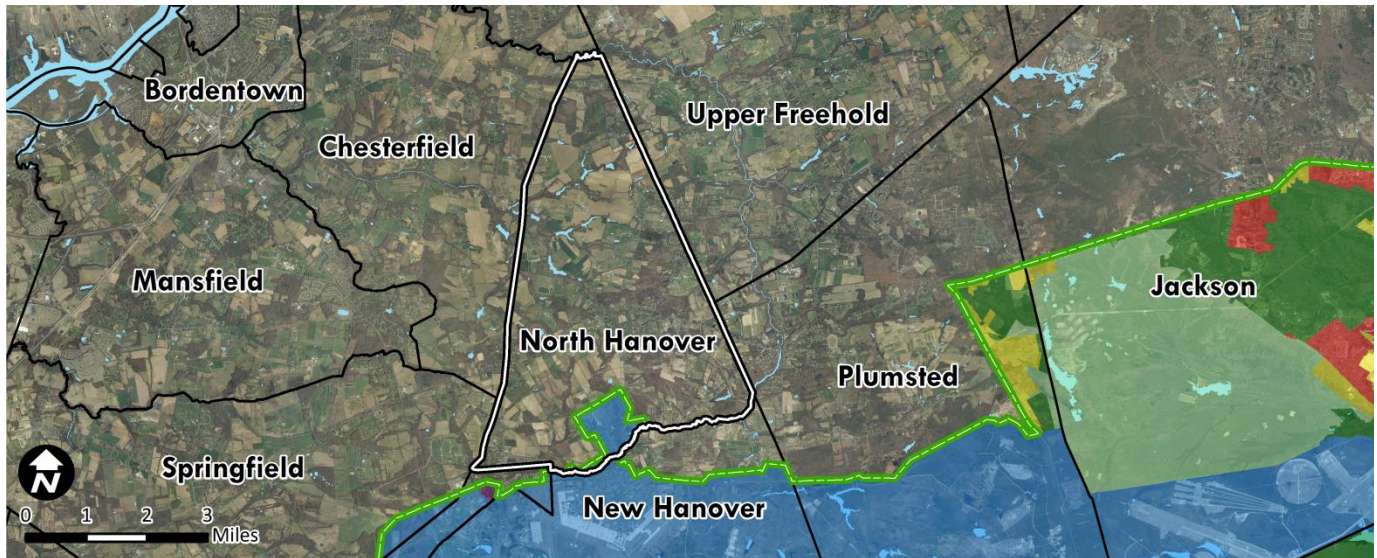
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
1,432	137	\$39,920

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

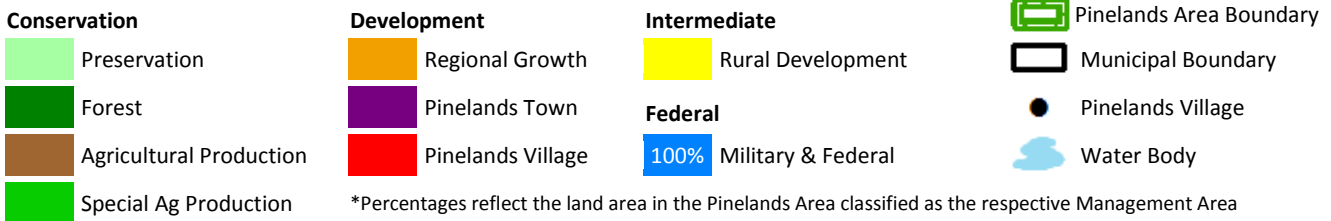
# North Hanover Township

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

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

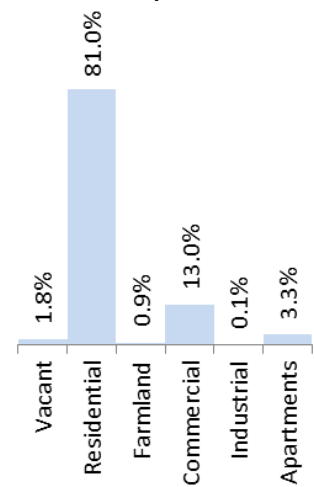


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,725	12,031	88
Population Density (per mile <sup>2</sup> )	442	1,773	139
Population Change - 2000 to 2012	5.1%	4.9%	75
% Land Protected in Pinelands Area*	0.0%	36.4%	46
Assessed Acres of Farmland	7,234	2,285	23
Building Permits Issued	11	22	75
Housing Transactions	6	62	160
Average Home Sale Price	\$332,150	\$273,524	31
Equalized Property Value (millions)	\$437.0	\$1,566.4	130
Effective Tax Rate	1.75	2.28	156
Average Residential Property Tax Bill	\$5,779	\$5,601	77
Per Capita Income Estimate	\$24,493	\$31,778	158
Unemployment Rate	11.5%	11.0%	82

Assessment Class Proportions in 2012 Municipal Valuations

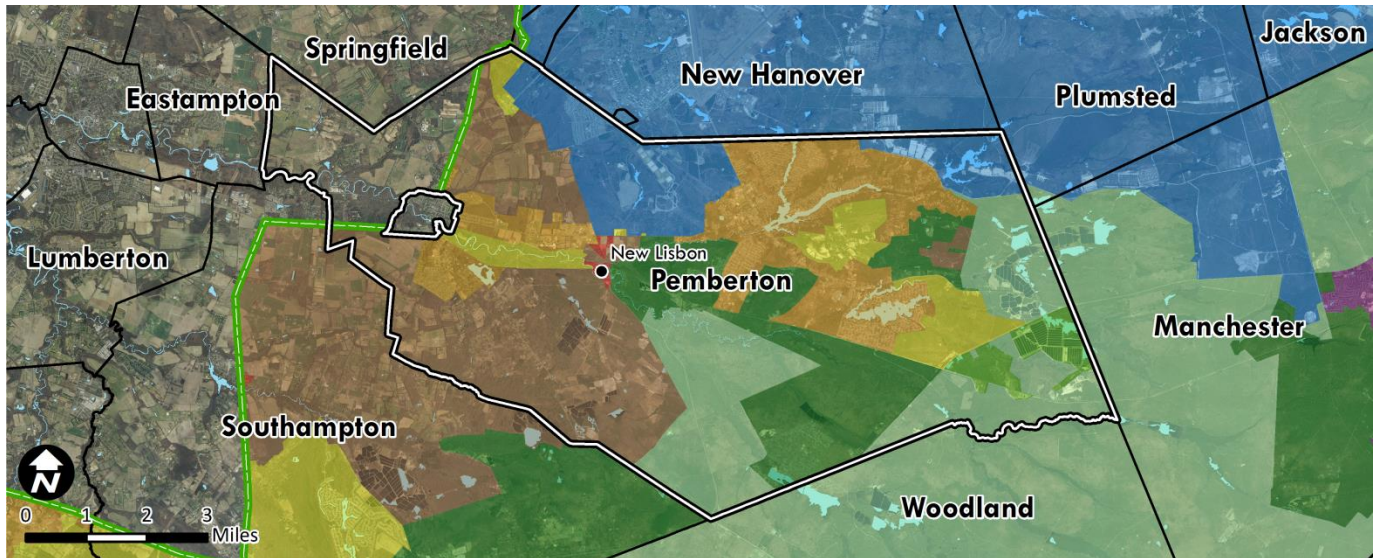


Private Sector Employment 353	Private Sector Establishments 63	Private Sector Avg. Annual Wages \$43,057
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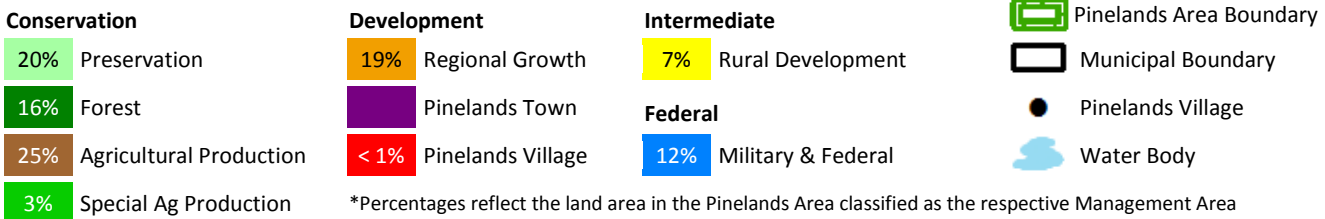
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Pemberton Township

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

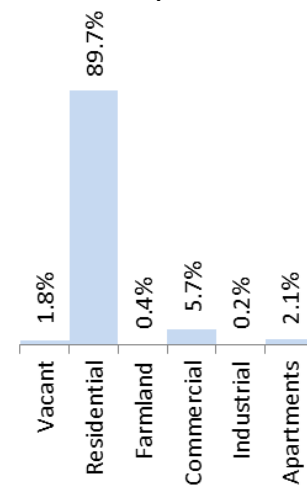


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	27,944	12,031	24
Population Density (per mile <sup>2</sup> )	444	1,773	138
Population Change - 2000 to 2012	-2.6%	4.9%	139
% Land Protected in Pinelands Area*	40.6%	36.4%	24
Assessed Acres of Farmland	9,833	2,285	11
Building Permits Issued	17	22	57
Housing Transactions	91	62	43
Average Home Sale Price	\$176,273	\$273,524	126
Equalized Property Value (millions)	\$1,565.4	\$1,566.4	57
Effective Tax Rate	1.95	2.28	137
Average Residential Property Tax Bill	\$3,380	\$5,601	193
Per Capita Income Estimate	\$23,601	\$31,778	166
Unemployment Rate	11.3%	11.0%	85

## Assessment Class Proportions in 2012 Municipal Valuations



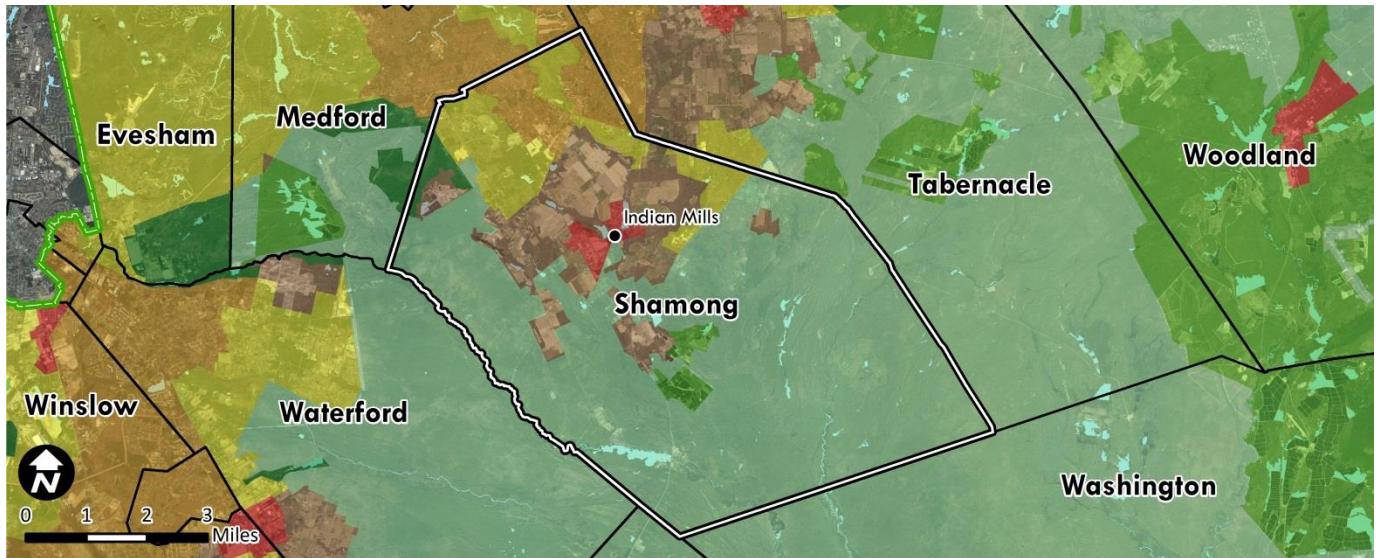
Private Sector Employment 2,374	Private Sector Establishments 202	Private Sector Avg. Annual Wages \$46,392
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

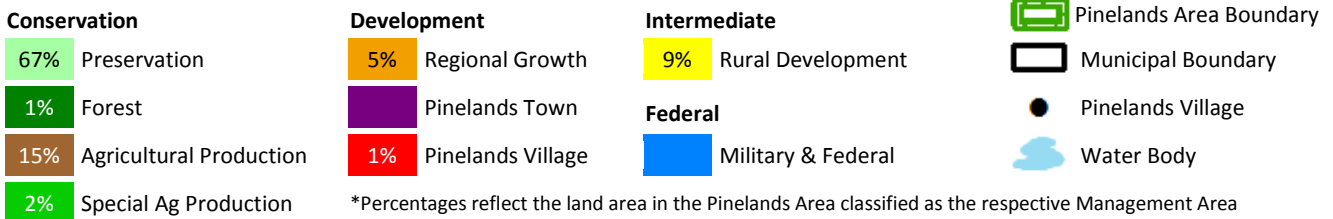
# Shamong Township

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

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

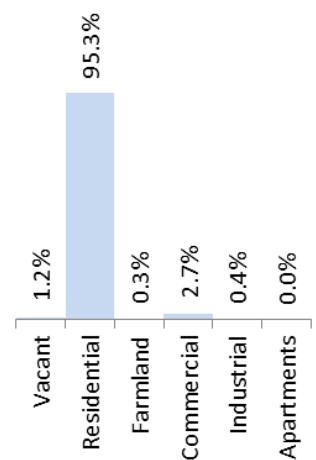


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,497	12,031	99
Population Density (per mile <sup>2</sup> )	145	1,773	175
Population Change - 2000 to 2012	0.5%	4.9%	110
% Land Protected in Pinelands Area*	63.5%	36.4%	13
Assessed Acres of Farmland	4,456	2,285	44
Building Permits Issued	9	22	83
Housing Transactions	19	62	122
Average Home Sale Price	\$331,684	\$273,524	32
Equalized Property Value (millions)	\$704.0	\$1,566.4	101
Effective Tax Rate	2.19	2.28	115
Average Residential Property Tax Bill	\$7,531	\$5,601	23
Per Capita Income Estimate	\$39,502	\$31,778	34
Unemployment Rate	7.1%	11.0%	177

## Assessment Class Proportions in 2012 Municipal Valuations



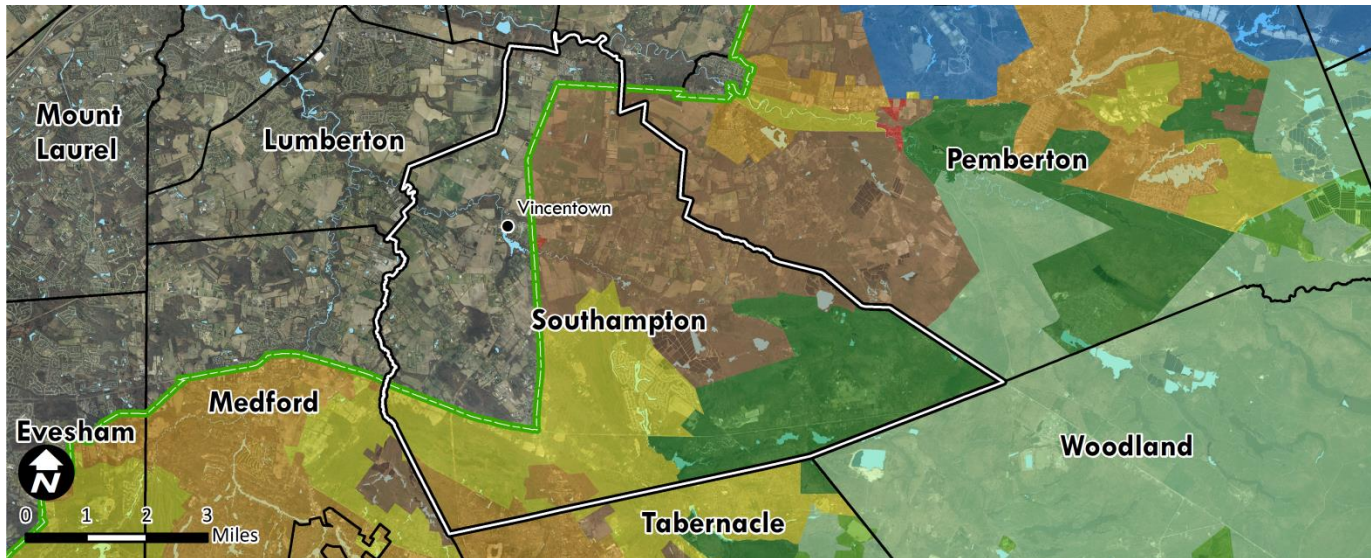
Private Sector Employment 832	Private Sector Establishments 120	Private Sector Avg. Annual Wages \$36,525
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

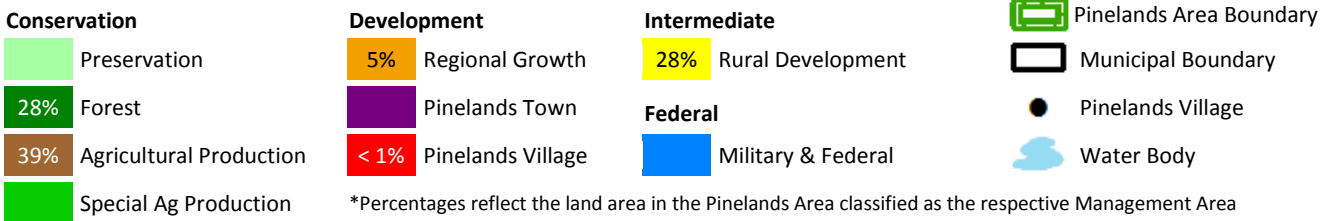


# Southampton Township

Pinelands Area 2010 population: 7,295 (70% of total population)  
 Pinelands Area acreage: 20,760 (73% of total acreage)

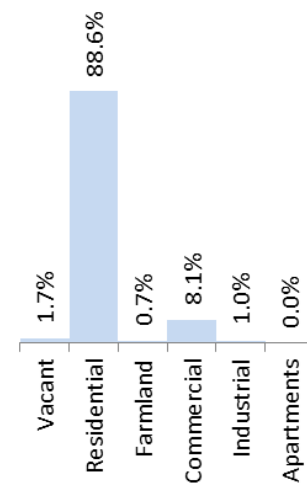


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	10,453	12,031	65
Population Density (per mile <sup>2</sup> )	235	1,773	160
Population Change - 2000 to 2012	0.6%	4.9%	109
% Land Protected in Pinelands Area*	31.5%	36.4%	29
Assessed Acres of Farmland	12,654	2,285	7
Building Permits Issued	12	22	73
Housing Transactions	33	62	91
Average Home Sale Price	\$173,153	\$273,524	135
Equalized Property Value (millions)	\$1,112.5	\$1,566.4	79
Effective Tax Rate	2.12	2.28	125
Average Residential Property Tax Bill	\$4,820	\$5,601	124
Per Capita Income Estimate	\$32,736	\$31,778	73
Unemployment Rate	11.9%	11.0%	70

Assessment Class Proportions in 2012 Municipal Valuations



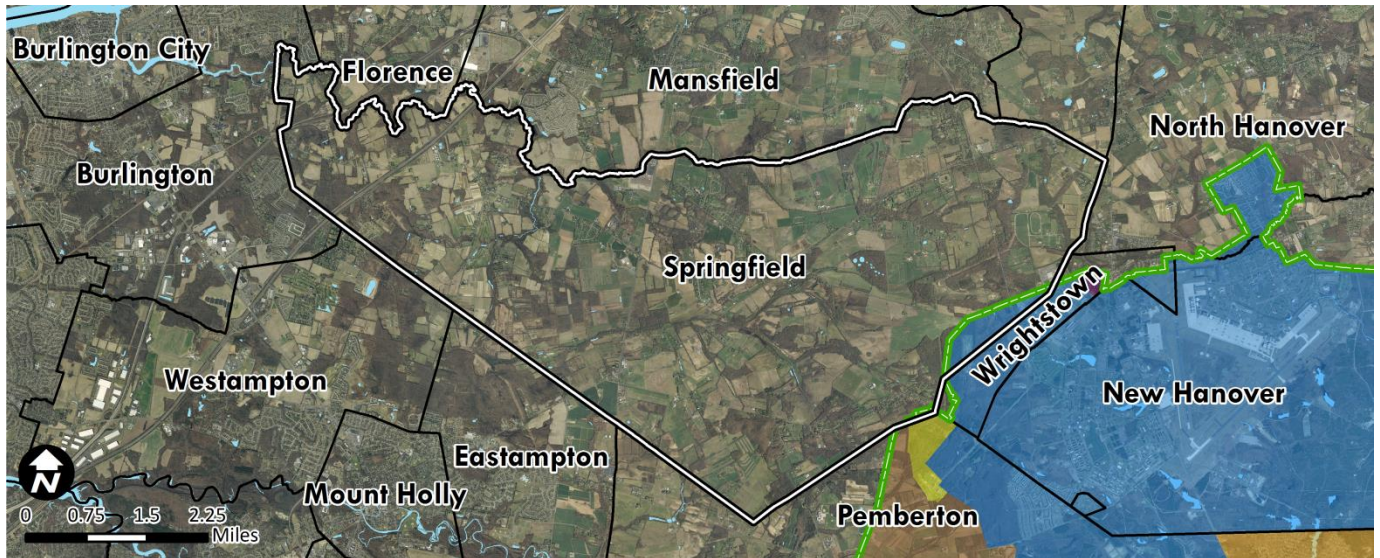
Private Sector Employment 2,194	Private Sector Establishments 240	Private Sector Avg. Annual Wages \$36,236
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

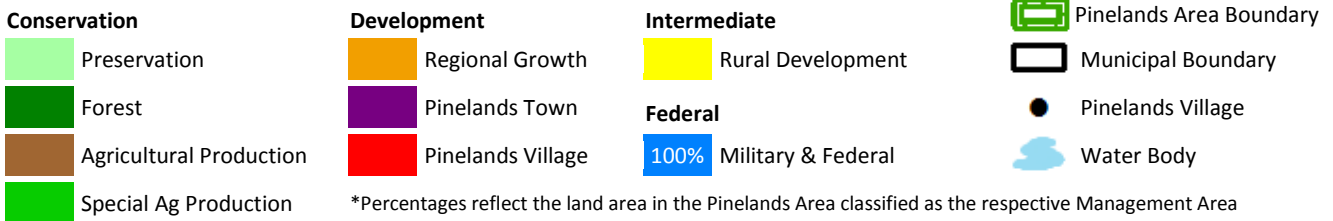
# Springfield Township

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

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

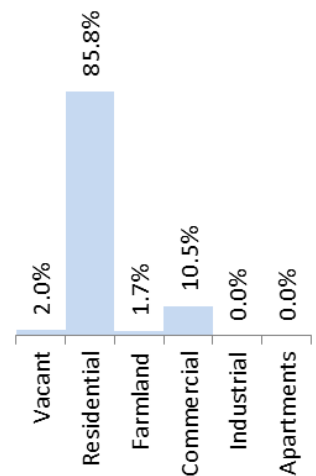


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	3,414	12,031	135
Population Density (per mile <sup>2</sup> )	115	1,773	179
Population Change - 2000 to 2012	5.8%	4.9%	72
% Land Protected in Pinelands Area*	0.0%	36.4%	46
Assessed Acres of Farmland	11,778	2,285	8
Building Permits Issued	2	22	134
Housing Transactions	16	62	127
Average Home Sale Price	\$287,094	\$273,524	52
Equalized Property Value (millions)	\$412.1	\$1,566.4	132
Effective Tax Rate	2.35	2.28	102
Average Residential Property Tax Bill	\$7,262	\$5,601	26
Per Capita Income Estimate	\$38,340	\$31,778	37
Unemployment Rate	8.9%	11.0%	137

Assessment Class Proportions in 2012 Municipal Valuations

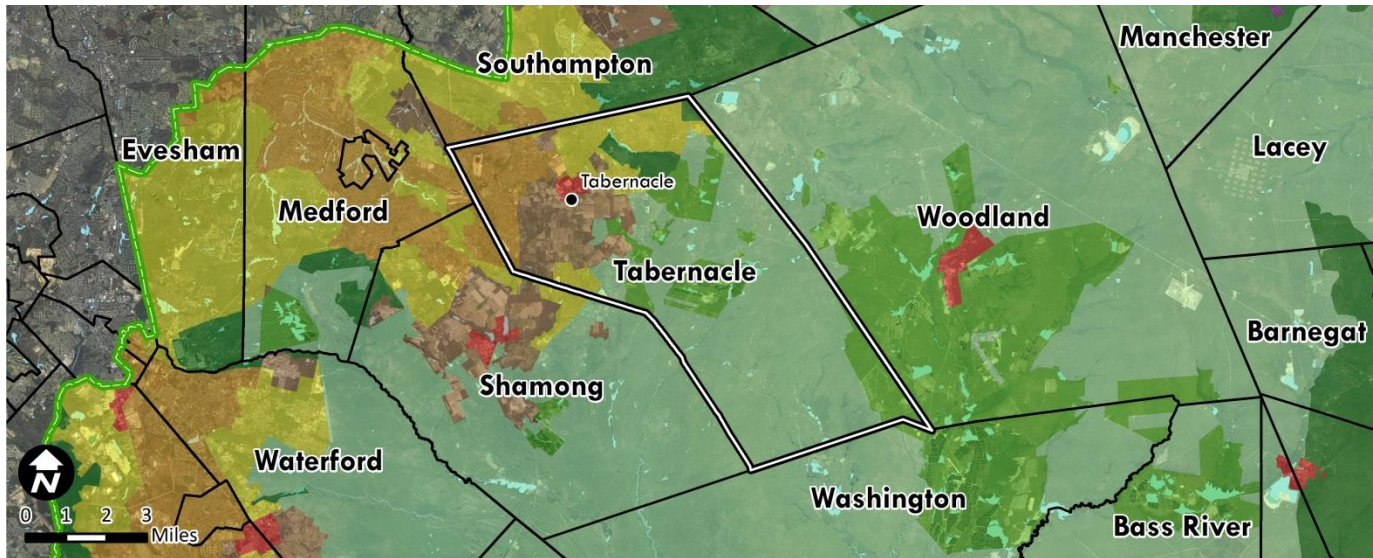


Private Sector Employment 268	Private Sector Establishments 44	Private Sector Avg. Annual Wages \$61,572
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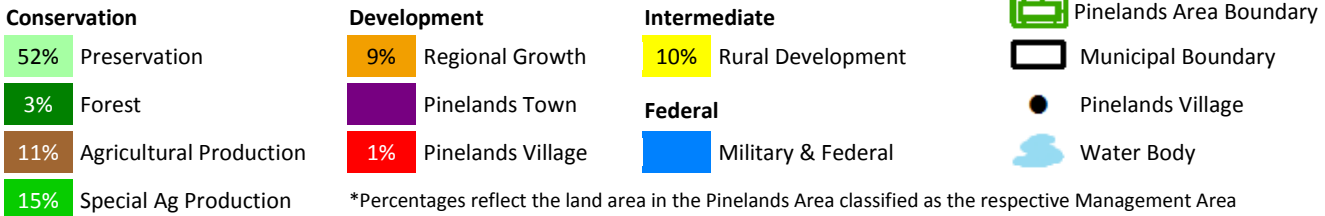
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Tabernacle Township

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

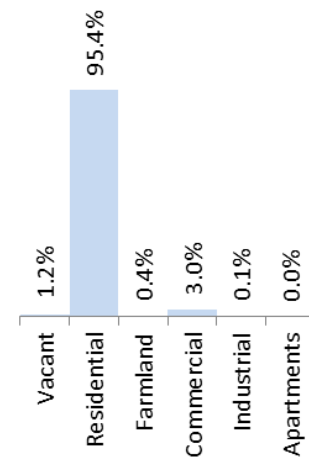


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,978	12,031	96
Population Density (per mile <sup>2</sup> )	142	1,773	176
Population Change - 2000 to 2012	-2.7%	4.9%	141
% Land Protected in Pinelands Area*	45.8%	36.4%	23
Assessed Acres of Farmland	9,544	2,285	15
Building Permits Issued	1	22	146
Housing Transactions	28	62	99
Average Home Sale Price	\$326,007	\$273,524	33
Equalized Property Value (millions)	\$720.1	\$1,566.4	98
Effective Tax Rate	2.17	2.28	119
Average Residential Property Tax Bill	\$6,633	\$5,601	45
Per Capita Income Estimate	\$36,796	\$31,778	48
Unemployment Rate	5.2%	11.0%	191

## Assessment Class Proportions in 2012 Municipal Valuations

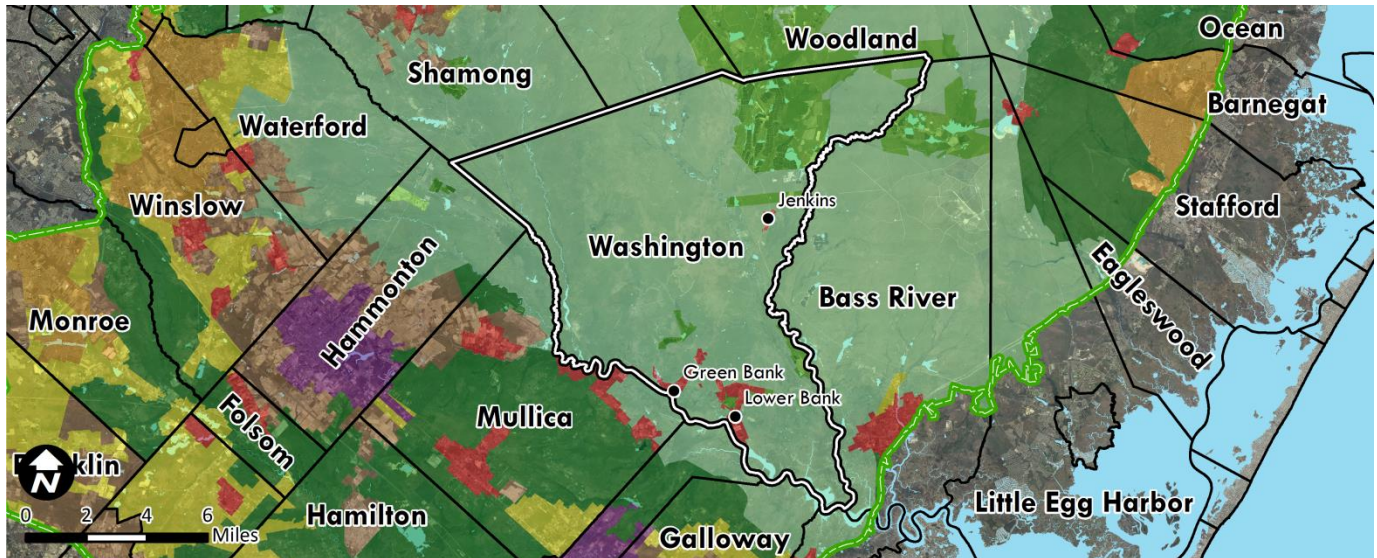


Private Sector Employment 693	Private Sector Establishments 148	Private Sector Avg. Annual Wages \$31,335
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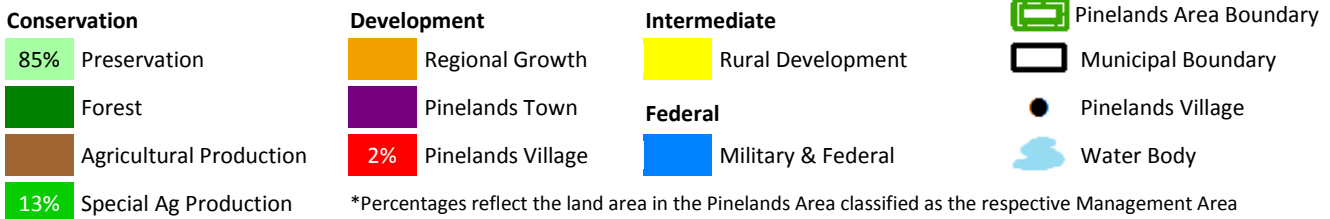
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Washington Township

Pinelands Area 2010 population: 793 (100% of total population)  
 Pinelands Area acreage: 66,774 (100% of total acreage)

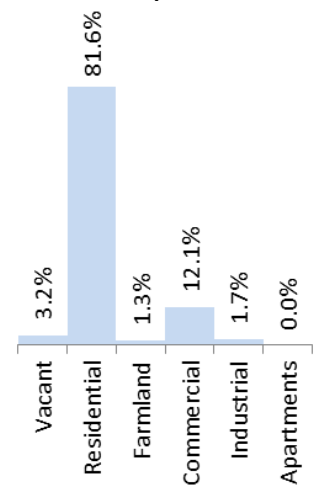


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	686	12,031	192
Population Density (per mile <sup>2</sup> )	7	1,773	202
Population Change - 2000 to 2012	10.5%	4.9%	51
% Land Protected in Pinelands Area*	86.3%	36.4%	3
Assessed Acres of Farmland	8,446	2,285	20
Building Permits Issued	4	22	114
Housing Transactions	1	62	193
Average Home Sale Price	\$294,000	\$273,524	48
Equalized Property Value (millions)	\$107.1	\$1,566.4	189
Effective Tax Rate	1.36	2.28	175
Average Residential Property Tax Bill	\$3,456	\$5,601	190
Per Capita Income Estimate	\$27,151	\$31,778	132
Unemployment Rate	14.3%	11.0%	41

Assessment Class Proportions in 2012 Municipal Valuations

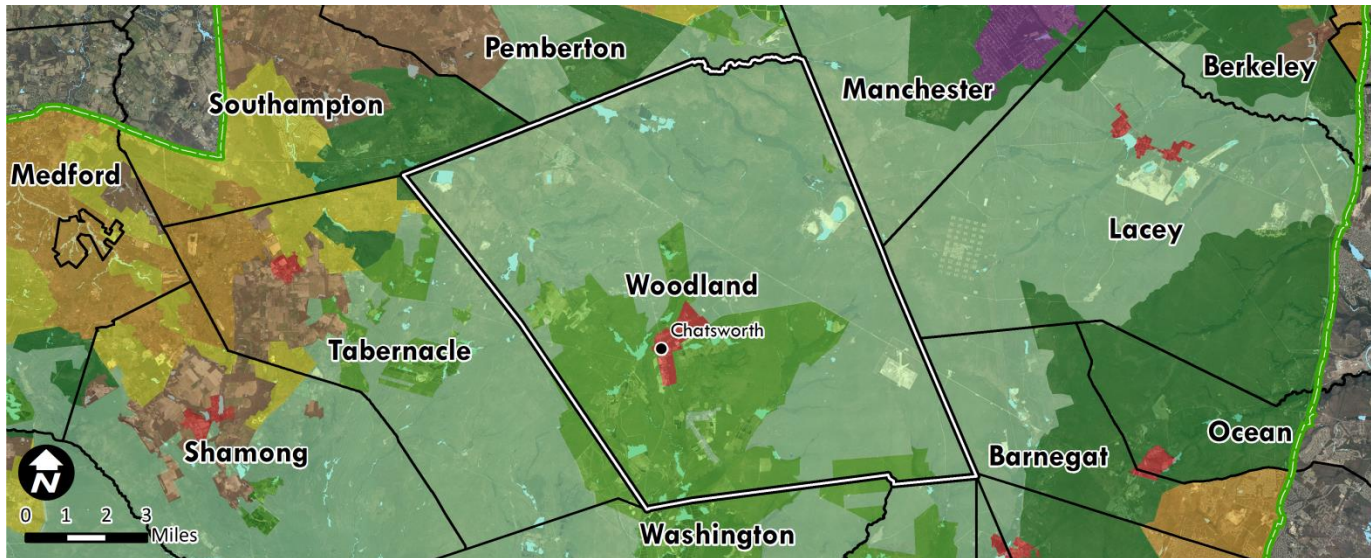


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
49	17	\$50,524

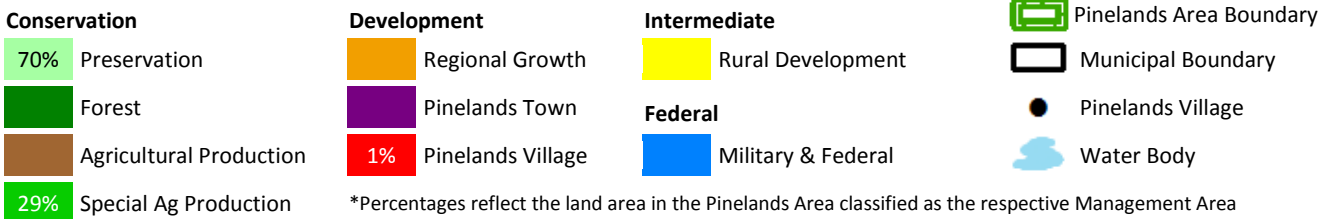
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Woodland Township

Pinelands Area 2010 population: 1,788 (100% of total population)  
 Pinelands Area acreage: 60,523 (100% of total acreage)

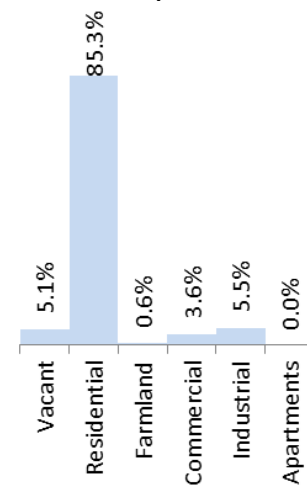


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,802	12,031	165
Population Density (per mile <sup>2</sup> )	19	1,773	198
Population Change - 2000 to 2012	54.0%	4.9%	4
% Land Protected in Pinelands Area*	76.5%	36.4%	6
Assessed Acres of Farmland	11,371	2,285	10
Building Permits Issued	9	22	83
Housing Transactions	5	62	166
Average Home Sale Price	\$257,160	\$273,524	63
Equalized Property Value (millions)	\$146.1	\$1,566.4	180
Effective Tax Rate	1.80	2.28	154
Average Residential Property Tax Bill	\$4,759	\$5,601	126
Per Capita Income Estimate	\$35,116	\$31,778	56
Unemployment Rate	11.1%	11.0%	88

Assessment Class Proportions in 2012 Municipal Valuations



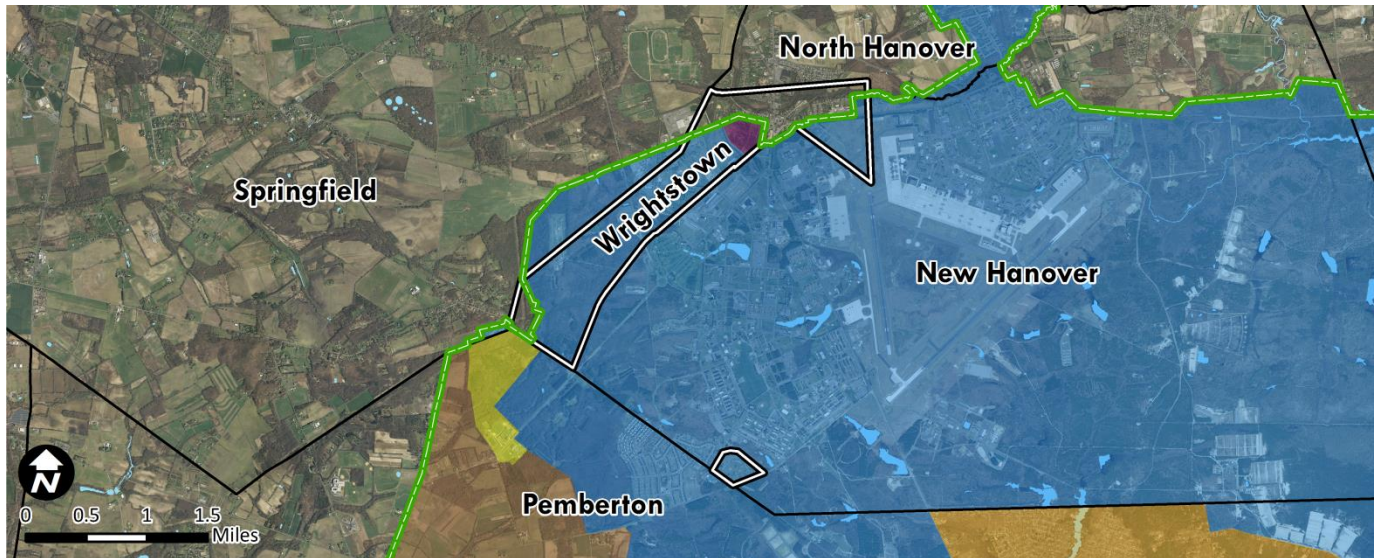
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
282	27	\$41,968

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

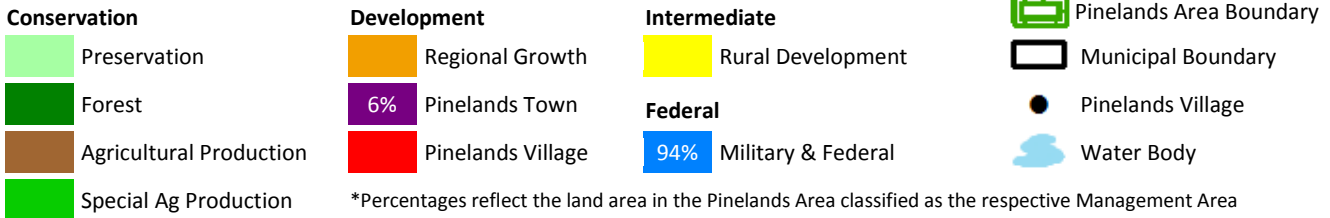
# Wrightstown Borough

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

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

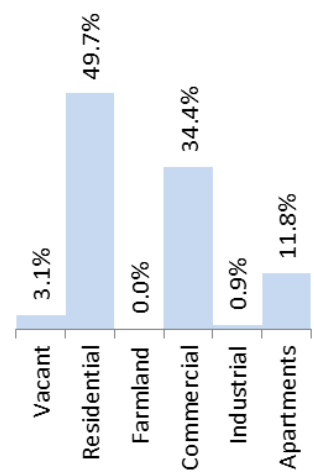


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	801	12,031	191
Population Density (per mile <sup>2</sup> )	435	1,773	140
Population Change - 2000 to 2012	7.1%	4.9%	66
% Land Protected in Pinelands Area*	0.0%	36.4%	46
Assessed Acres of Farmland	24	2,285	112
Building Permits Issued	0	22	169
Housing Transactions	1	62	193
Average Home Sale Price	\$145,000	\$273,524	173
Equalized Property Value (millions)	\$38.6	\$1,566.4	199
Effective Tax Rate	2.21	2.28	112
Average Residential Property Tax Bill	\$3,608	\$5,601	185
Per Capita Income Estimate	\$20,288	\$31,778	188
Unemployment Rate	13.5%	11.0%	50

Assessment Class Proportions in 2012 Municipal Valuations

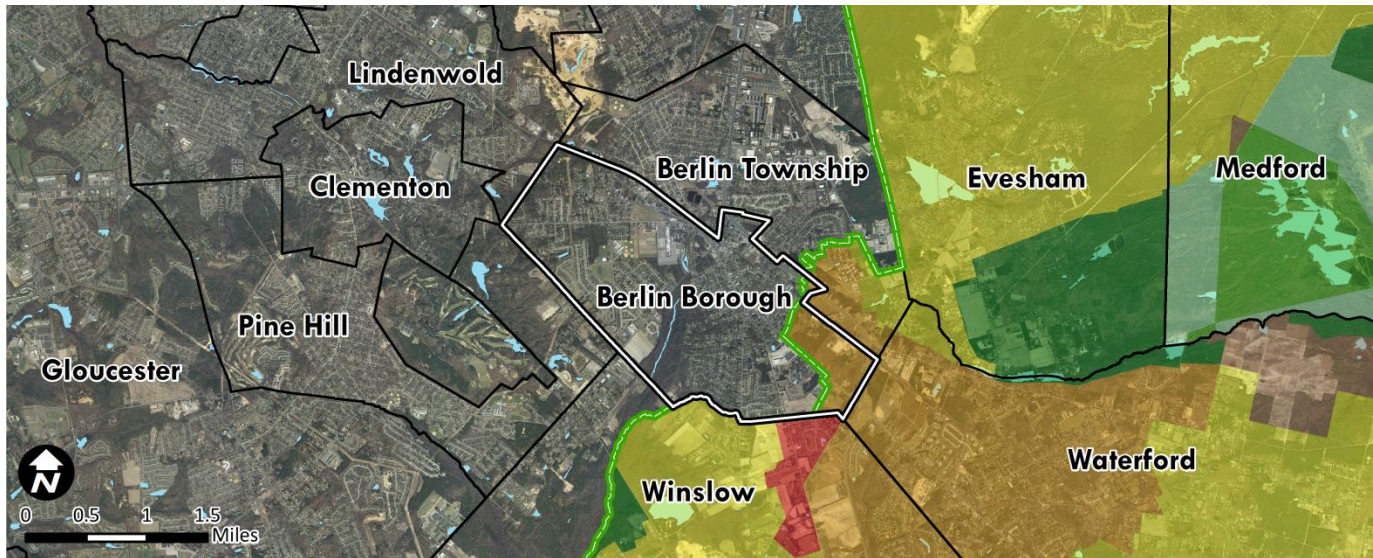


Private Sector Employment 591	Private Sector Establishments 72	Private Sector Avg. Annual Wages \$31,604
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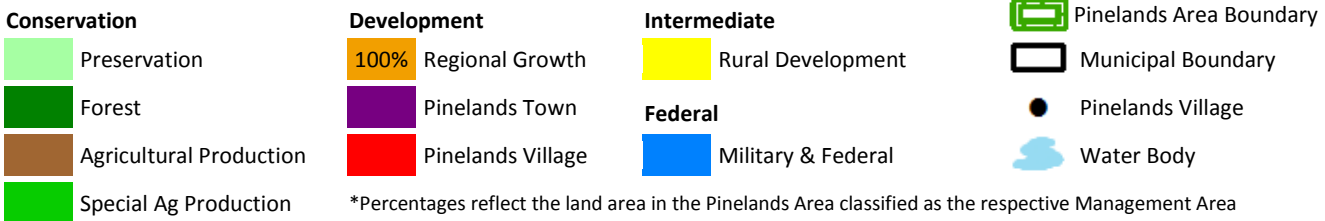
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Berlin Borough

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

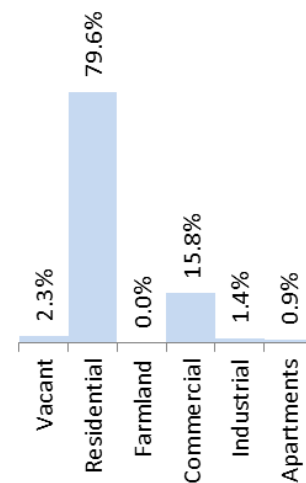


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,606	12,031	90
Population Density (per mile <sup>2</sup> )	2,089	1,773	71
Population Change - 2000 to 2012	23.7%	4.9%	22
% Land Protected in Pinelands Area*	0.0%	36.4%	46
Assessed Acres of Farmland	93	2,285	105
Building Permits Issued	4	22	114
Housing Transactions	43	62	75
Average Home Sale Price	\$214,064	\$273,524	93
Equalized Property Value (millions)	\$768.2	\$1,566.4	96
Effective Tax Rate	2.69	2.28	56
Average Residential Property Tax Bill	\$6,636	\$5,601	44
Per Capita Income Estimate	\$32,263	\$31,778	80
Unemployment Rate	8.7%	11.0%	140

Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment 4,124	Private Sector Establishments 361	Private Sector Avg. Annual Wages \$38,761
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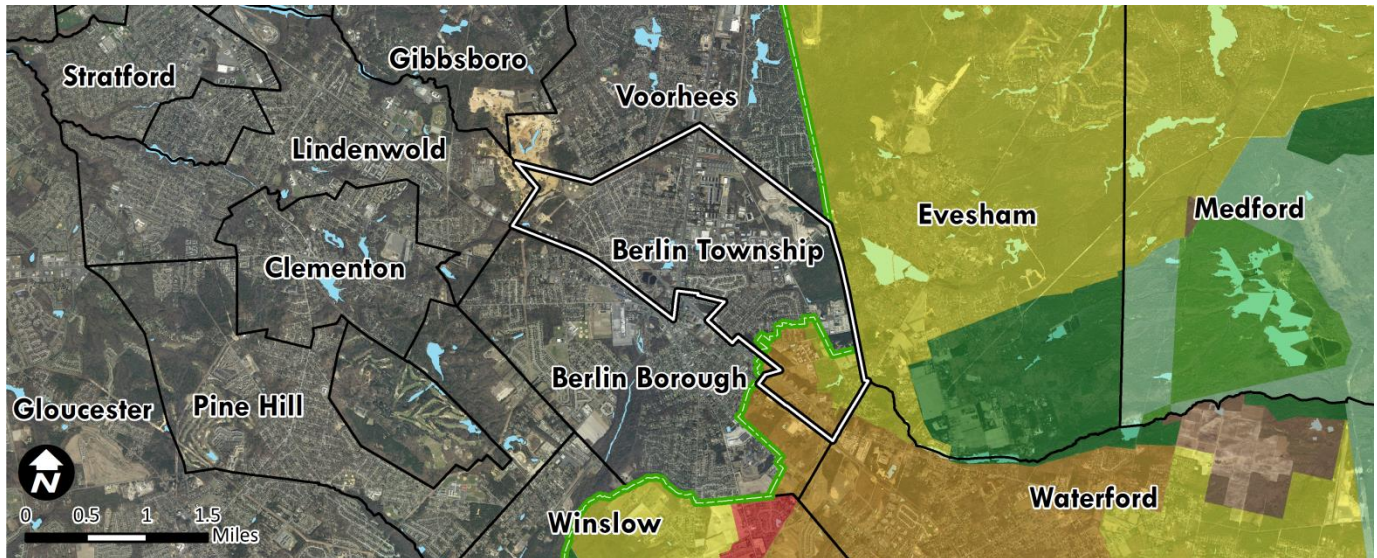
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Berlin Township

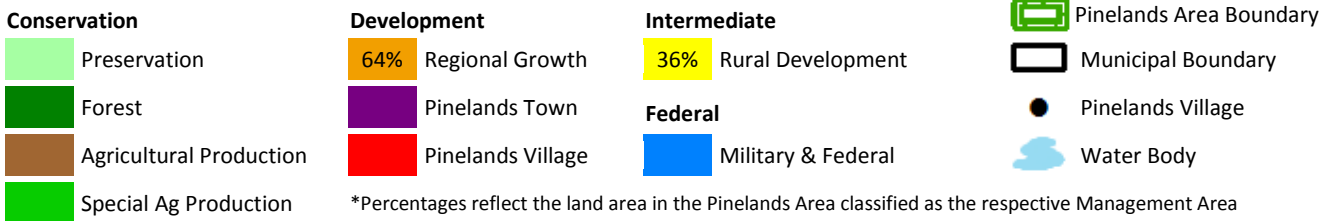


Pinelands Area 2010 population: 303 (6% of total population)

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

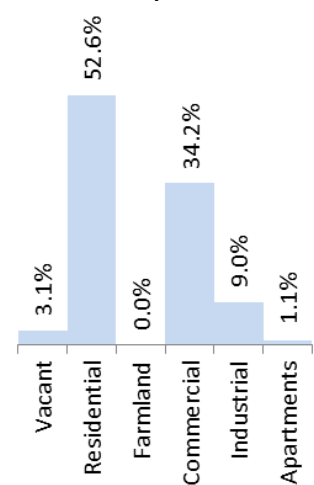


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	5,421	12,031	107
Population Density (per mile <sup>2</sup> )	1,649	1,773	82
Population Change - 2000 to 2012	2.5%	4.9%	90
% Land Protected in Pinelands Area*	0.0%	36.4%	46
Assessed Acres of Farmland	157	2,285	100
Building Permits Issued	21	22	48
Housing Transactions	14	62	134
Average Home Sale Price	\$174,339	\$273,524	131
Equalized Property Value (millions)	\$555.2	\$1,566.4	112
Effective Tax Rate	3.28	2.28	23
Average Residential Property Tax Bill	\$5,655	\$5,601	82
Per Capita Income Estimate	\$29,140	\$31,778	109
Unemployment Rate	6.3%	11.0%	184

Assessment Class Proportions in 2012 Municipal Valuations



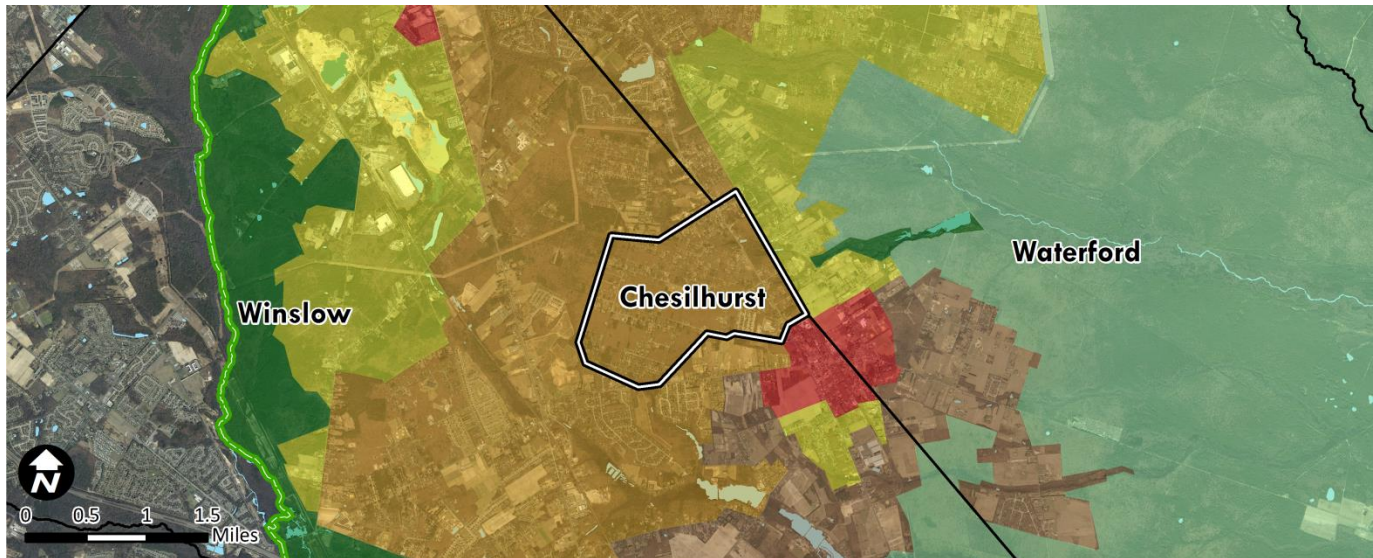
Private Sector Employment 4,647	Private Sector Establishments 371	Private Sector Avg. Annual Wages \$37,743
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

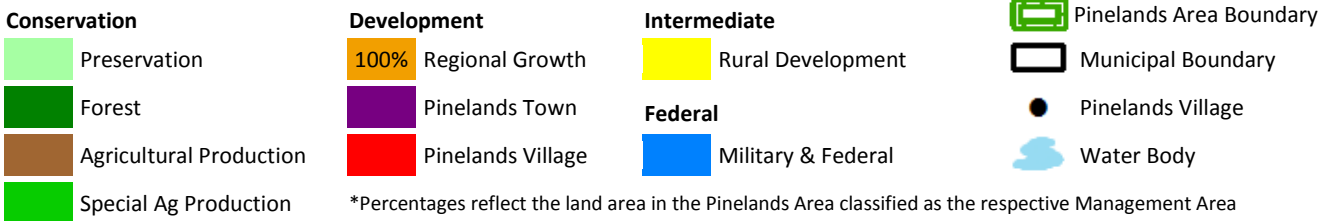


# Chesilhurst Borough

Pinelands Area 2010 population: 1,634 (100% of total population)  
 Pinelands Area acreage: 1,105 (100% of total acreage)

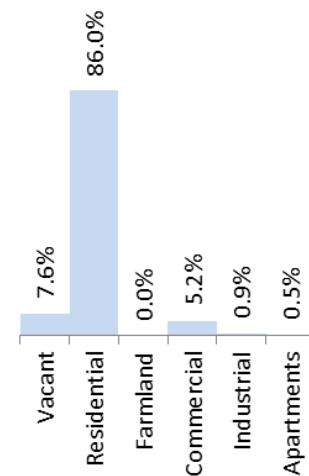


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,643	12,031	170
Population Density (per mile <sup>2</sup> )	951	1,773	107
Population Change - 2000 to 2012	8.1%	4.9%	63
% Land Protected in Pinelands Area*	0.0%	36.4%	45
Assessed Acres of Farmland	0	2,285	122
Building Permits Issued	1	22	146
Housing Transactions	0	62	199
Average Home Sale Price	\$0	\$273,524	199
Equalized Property Value (millions)	\$89.5	\$1,566.4	191
Effective Tax Rate	2.96	2.28	38
Average Residential Property Tax Bill	\$4,834	\$5,601	121
Per Capita Income Estimate	\$23,109	\$31,778	172
Unemployment Rate	15.8%	11.0%	25

Assessment Class Proportions in 2012 Municipal Valuations

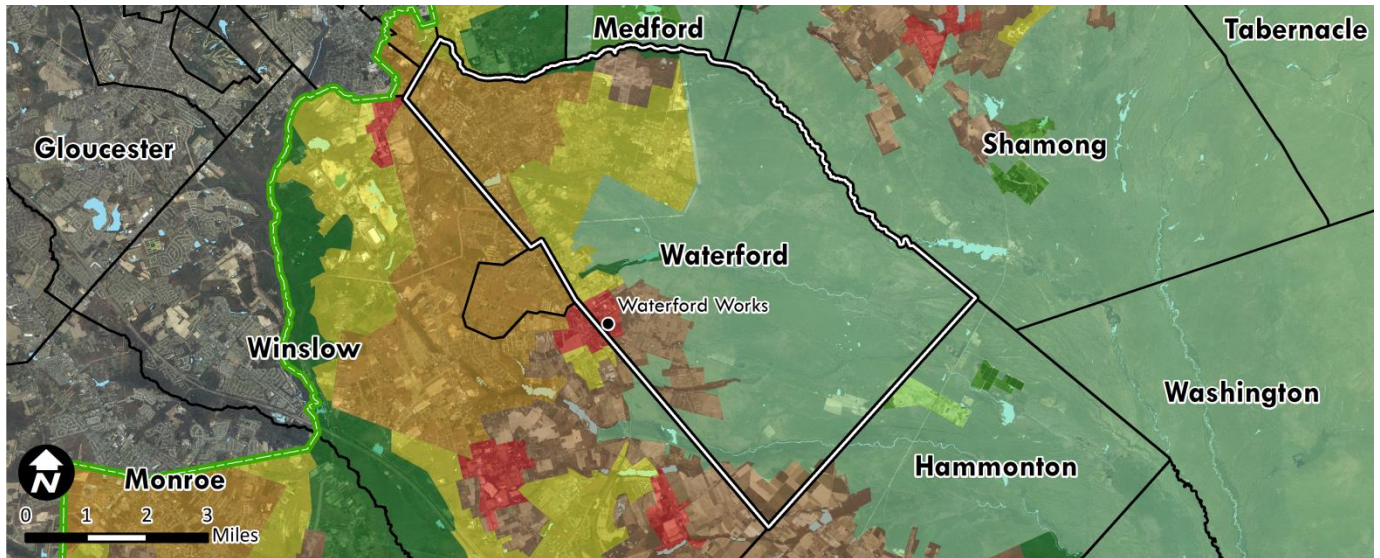


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
97	14	\$38,274

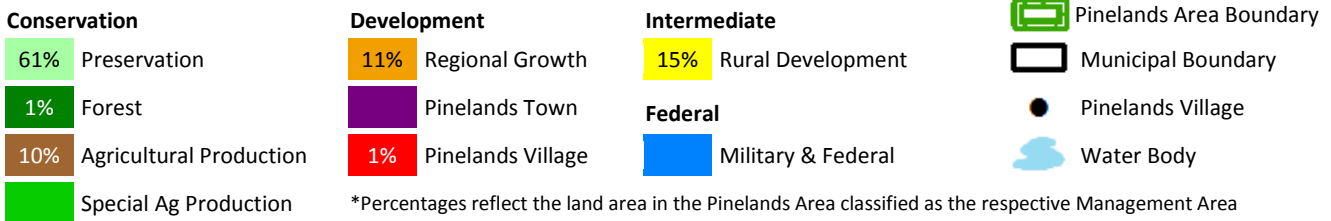
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Waterford Township

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

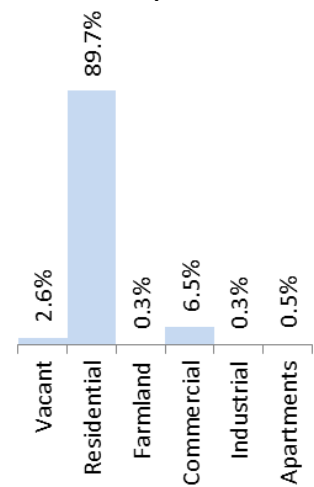


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	10,711	12,031	62
Population Density (per mile <sup>2</sup> )	296	1,773	152
Population Change - 2000 to 2012	2.1%	4.9%	95
% Land Protected in Pinelands Area*	65.1%	36.4%	12
Assessed Acres of Farmland	2,565	2,285	55
Building Permits Issued	38	22	39
Housing Transactions	49	62	70
Average Home Sale Price	\$175,153	\$273,524	129
Equalized Property Value (millions)	\$811.7	\$1,566.4	92
Effective Tax Rate	2.92	2.28	44
Average Residential Property Tax Bill	\$6,261	\$5,601	60
Per Capita Income Estimate	\$27,600	\$31,778	126
Unemployment Rate	10.1%	11.0%	105

Assessment Class Proportions in 2012 Municipal Valuations

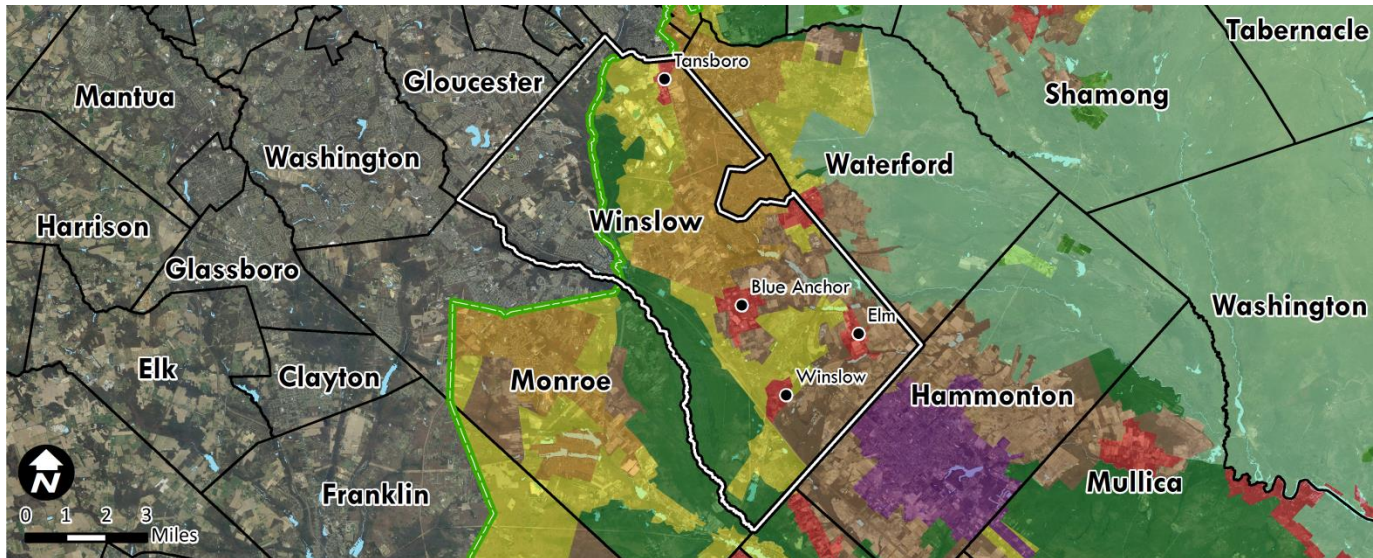


Private Sector Employment 1,886	Private Sector Establishments 234	Private Sector Avg. Annual Wages \$29,428
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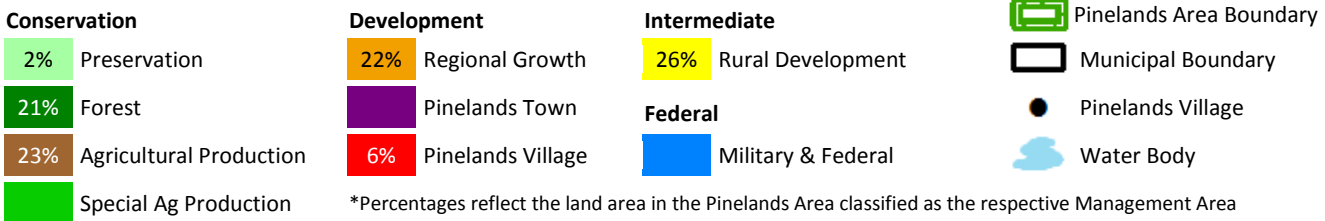
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Winslow Township

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

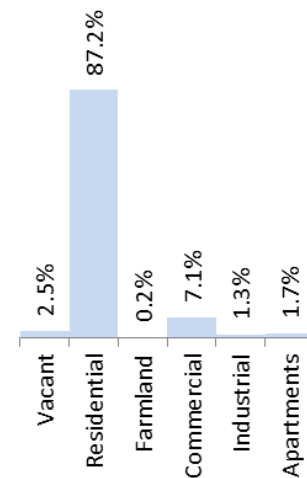


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	39,238	12,031	16
Population Density (per mile <sup>2</sup> )	673	1,773	123
Population Change - 2000 to 2012	13.4%	4.9%	42
% Land Protected in Pinelands Area*	30.1%	36.4%	31
Assessed Acres of Farmland	6,776	2,285	28
Building Permits Issued	4	22	114
Housing Transactions	59	62	60
Average Home Sale Price	\$174,988	\$273,524	130
Equalized Property Value (millions)	\$2,662.8	\$1,566.4	34
Effective Tax Rate	2.81	2.28	50
Average Residential Property Tax Bill	\$5,345	\$5,601	93
Per Capita Income Estimate	\$27,713	\$31,778	124
Unemployment Rate	10.9%	11.0%	91

Assessment Class Proportions in 2012 Municipal Valuations

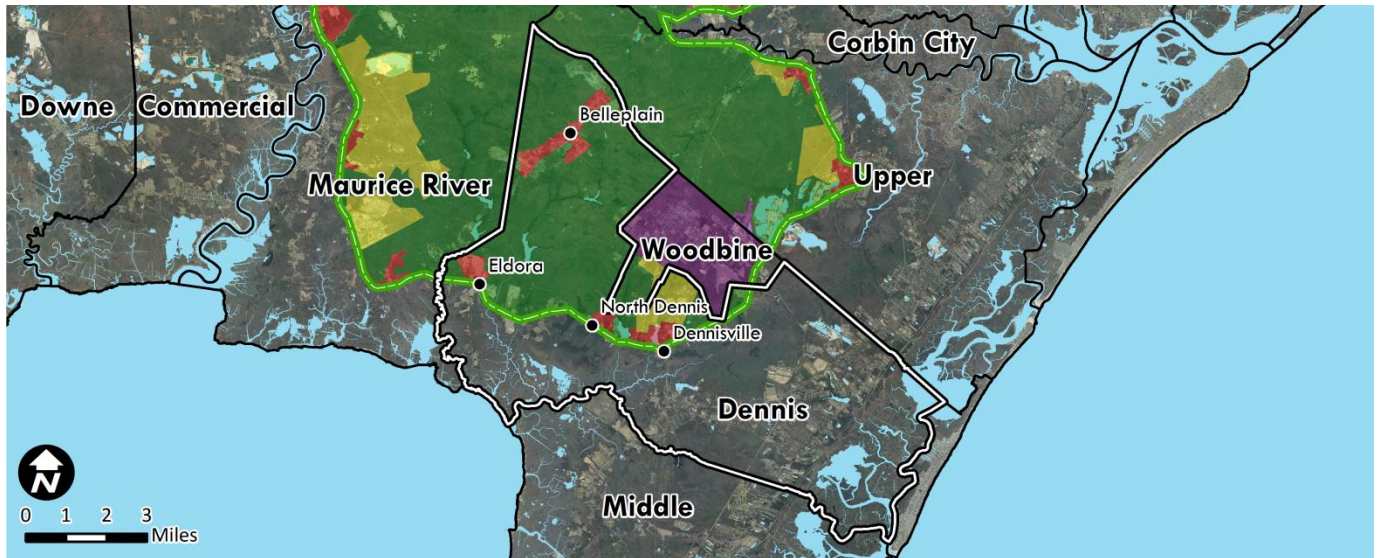


Private Sector Employment 5,270	Private Sector Establishments 597	Private Sector Avg. Annual Wages \$32,865
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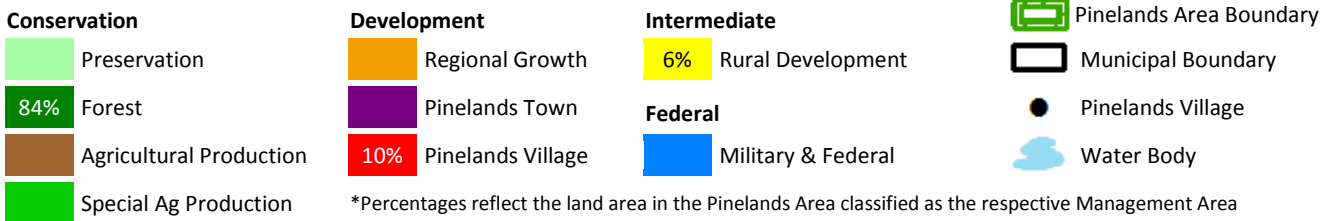
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Dennis Township

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

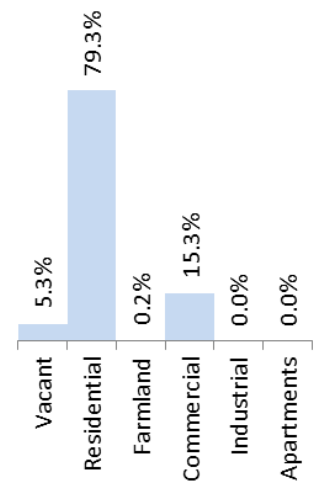


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,407	12,031	100
Population Density (per mile <sup>2</sup> )	100	1,773	184
Population Change - 2000 to 2012	-1.3%	4.9%	130
% Land Protected in Pinelands Area*	68.1%	36.4%	10
Assessed Acres of Farmland	3,834	2,285	48
Building Permits Issued	11	22	75
Housing Transactions	21	62	117
Average Home Sale Price	\$220,524	\$273,524	85
Equalized Property Value (millions)	\$879.5	\$1,566.4	89
Effective Tax Rate	1.39	2.28	173
Average Residential Property Tax Bill	\$2,840	\$5,601	196
Per Capita Income Estimate	\$28,558	\$31,778	112
Unemployment Rate	8.2%	11.0%	147

Assessment Class Proportions in 2012 Municipal Valuations

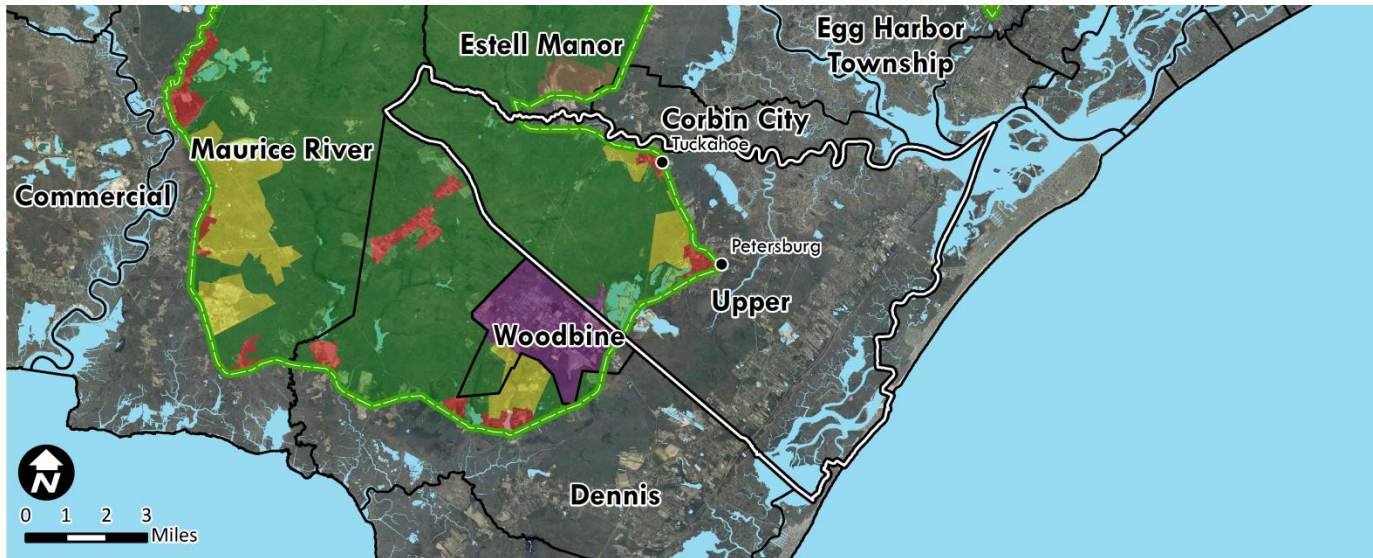


Private Sector Employment 1,488	Private Sector Establishments 182	Private Sector Avg. Annual Wages \$35,229
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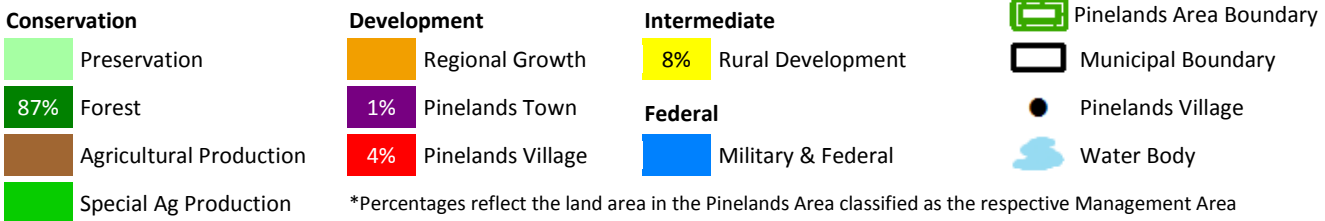
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Upper Township

Pinelands Area 2010 population: 1,306 (11% of total population)  
 Pinelands Area acreage: 14,322 (33% of total acreage)

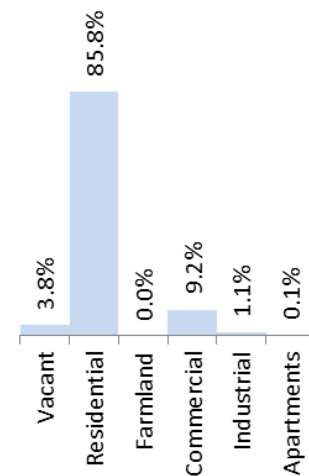


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	12,247	12,031	53
Population Density (per mile <sup>2</sup> )	178	1,773	171
Population Change - 2000 to 2012	1.1%	4.9%	104
% Land Protected in Pinelands Area*	51.3%	36.4%	17
Assessed Acres of Farmland	2,311	2,285	58
Building Permits Issued	13	22	67
Housing Transactions	84	62	46
Average Home Sale Price	\$354,167	\$273,524	26
Equalized Property Value (millions)	\$2,026.7	\$1,566.4	47
Effective Tax Rate	1.38	2.28	174
Average Residential Property Tax Bill	\$4,448	\$5,601	148
Per Capita Income Estimate	\$35,120	\$31,778	55
Unemployment Rate	4.2%	11.0%	195

Assessment Class Proportions in 2012 Municipal Valuations

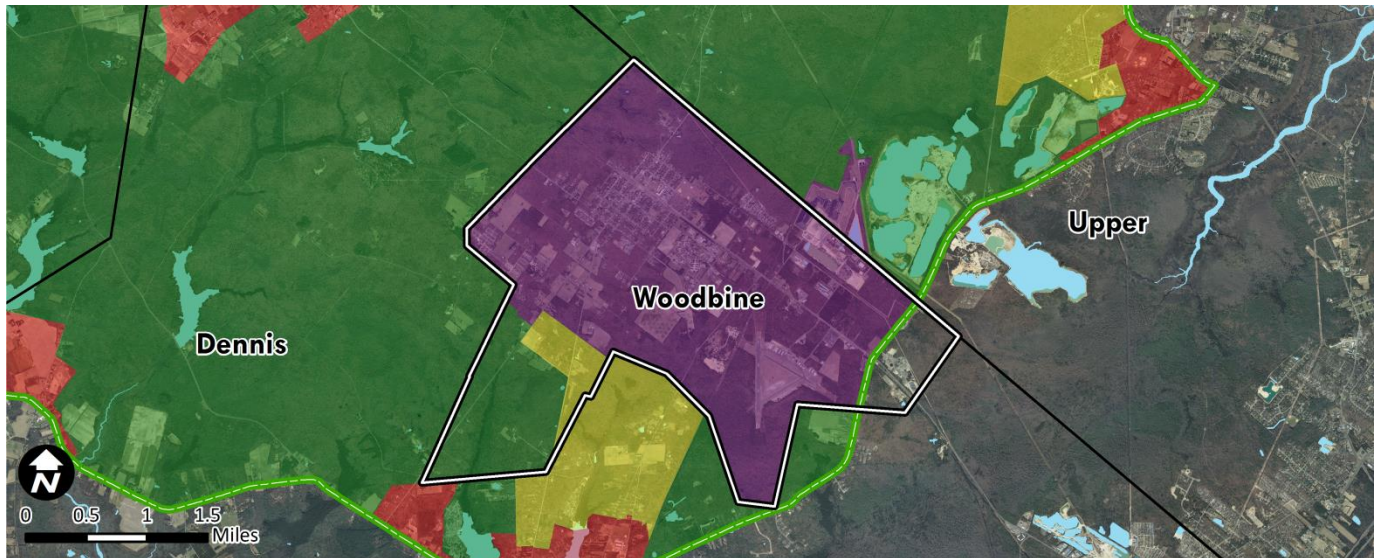


Private Sector Employment 2,374	Private Sector Establishments 288	Private Sector Avg. Annual Wages \$37,154
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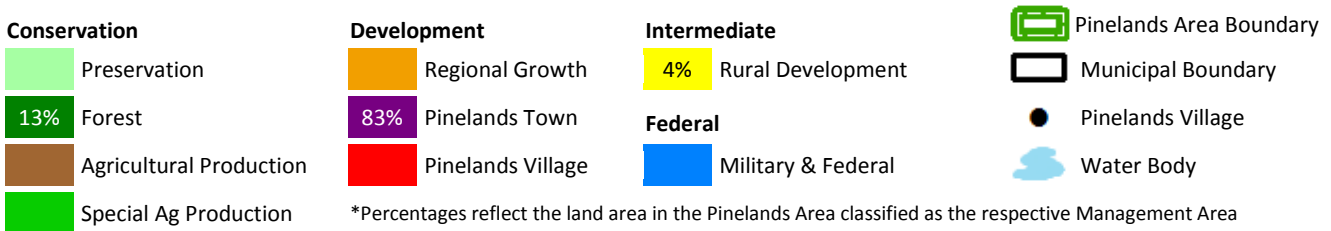
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Woodbine Borough

Pinelands Area 2010 population: 2,465 (99% of total population)  
 Pinelands Area acreage: 4,801 (95% of total acreage)

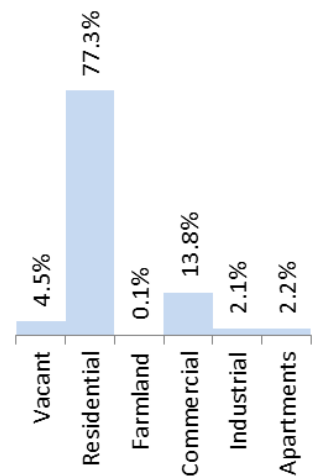


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,462	12,031	153
Population Density (per mile <sup>2</sup> )	312	1,773	150
Population Change - 2000 to 2012	-9.4%	4.9%	176
% Land Protected in Pinelands Area*	7.2%	36.4%	40
Assessed Acres of Farmland	331	2,285	86
Building Permits Issued	0	22	169
Housing Transactions	1	62	193
Average Home Sale Price	\$270,000	\$273,524	59
Equalized Property Value (millions)	\$189.0	\$1,566.4	171
Effective Tax Rate	1.19	2.28	180
Average Residential Property Tax Bill	\$1,605	\$5,601	200
Per Capita Income Estimate	\$20,209	\$31,778	189
Unemployment Rate	13.9%	11.0%	46

Assessment Class Proportions in 2012 Municipal Valuations

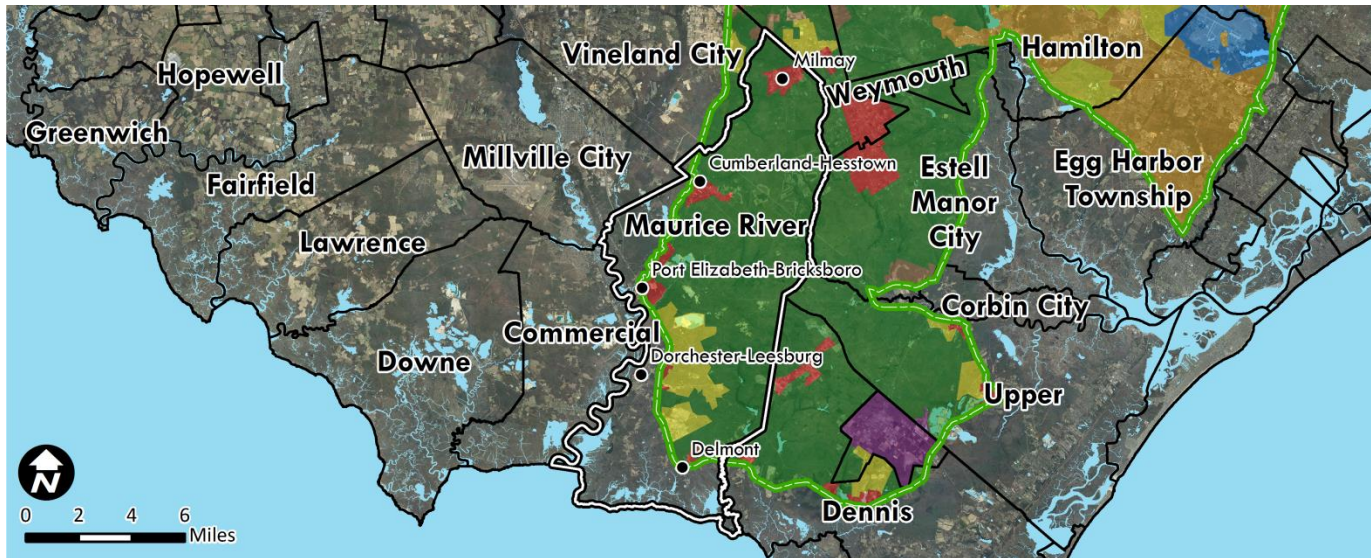


Private Sector Employment 517	Private Sector Establishments 81	Private Sector Avg. Annual Wages \$38,273
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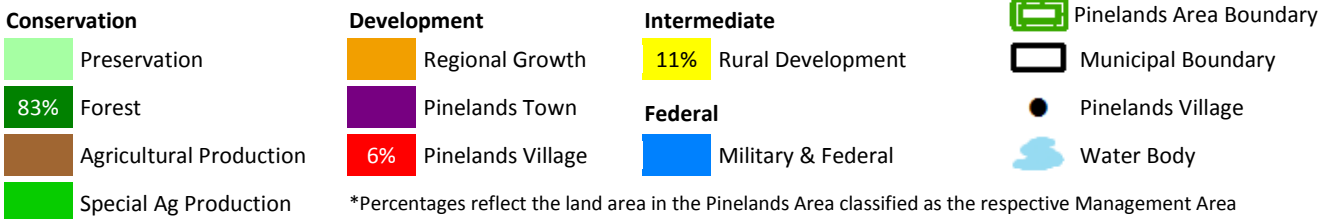
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Maurice River Township

Pinelands Area 2010 population: 5,897 (74% of total population)  
 Pinelands Area acreage: 42,009 (70% of total acreage)

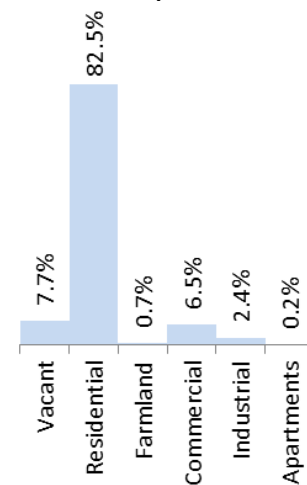


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	8,146	12,031	83
Population Density (per mile <sup>2</sup> )	86	1,773	188
Population Change - 2000 to 2012	17.6%	4.9%	32
% Land Protected in Pinelands Area*	50.2%	36.4%	19
Assessed Acres of Farmland	9,736	2,285	12
Building Permits Issued	13	22	67
Housing Transactions	4	62	173
Average Home Sale Price	\$172,750	\$273,524	136
Equalized Property Value (millions)	\$321.5	\$1,566.4	139
Effective Tax Rate	2.08	2.28	130
Average Residential Property Tax Bill	\$4,131	\$5,601	165
Per Capita Income Estimate	\$30,394	\$31,778	95
Unemployment Rate	11.4%	11.0%	84

Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment 214	Private Sector Establishments 27	Private Sector Avg. Annual Wages \$28,044
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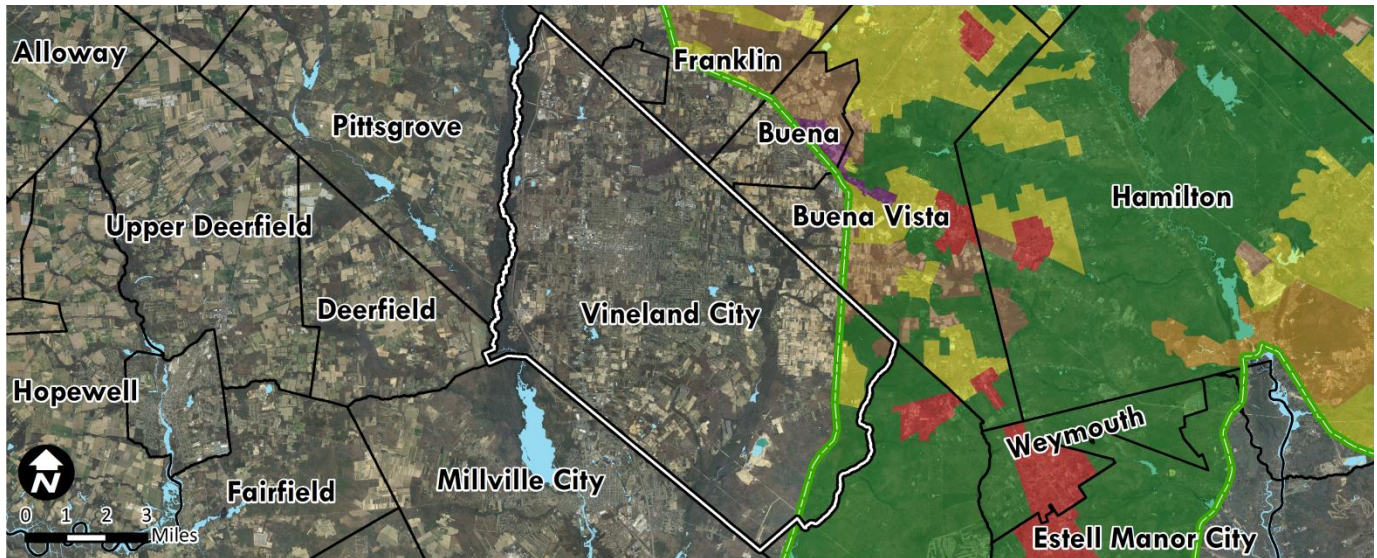
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Vineland City

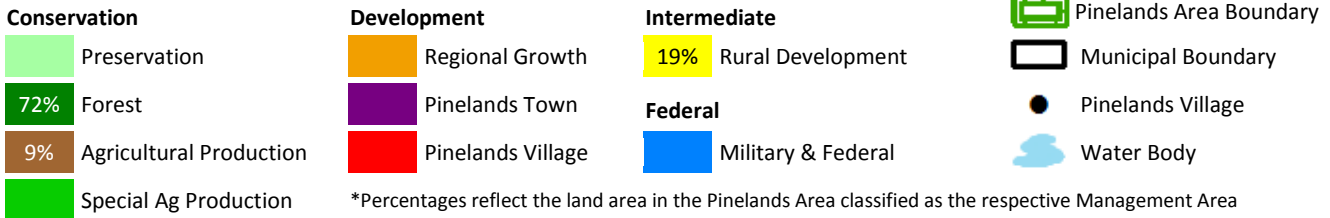


Pinelands Area 2010 population: 156 (< 1% of total population)

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

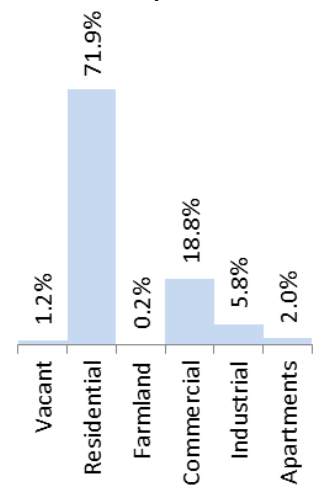


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	60,854	12,031	7
Population Density (per mile <sup>2</sup> )	881	1,773	113
Population Change - 2000 to 2012	8.1%	4.9%	62
% Land Protected in Pinelands Area*	78.5%	36.4%	5
Assessed Acres of Farmland	8,727	2,285	16
Building Permits Issued	75	22	16
Housing Transactions	236	62	13
Average Home Sale Price	\$170,908	\$273,524	140
Equalized Property Value (millions)	\$4,145.0	\$1,566.4	20
Effective Tax Rate	2.12	2.28	126
Average Residential Property Tax Bill	\$3,945	\$5,601	172
Per Capita Income Estimate	\$23,278	\$31,778	170
Unemployment Rate	13.8%	11.0%	47

Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment 24,388	Private Sector Establishments 1,587	Private Sector Avg. Annual Wages \$39,394
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

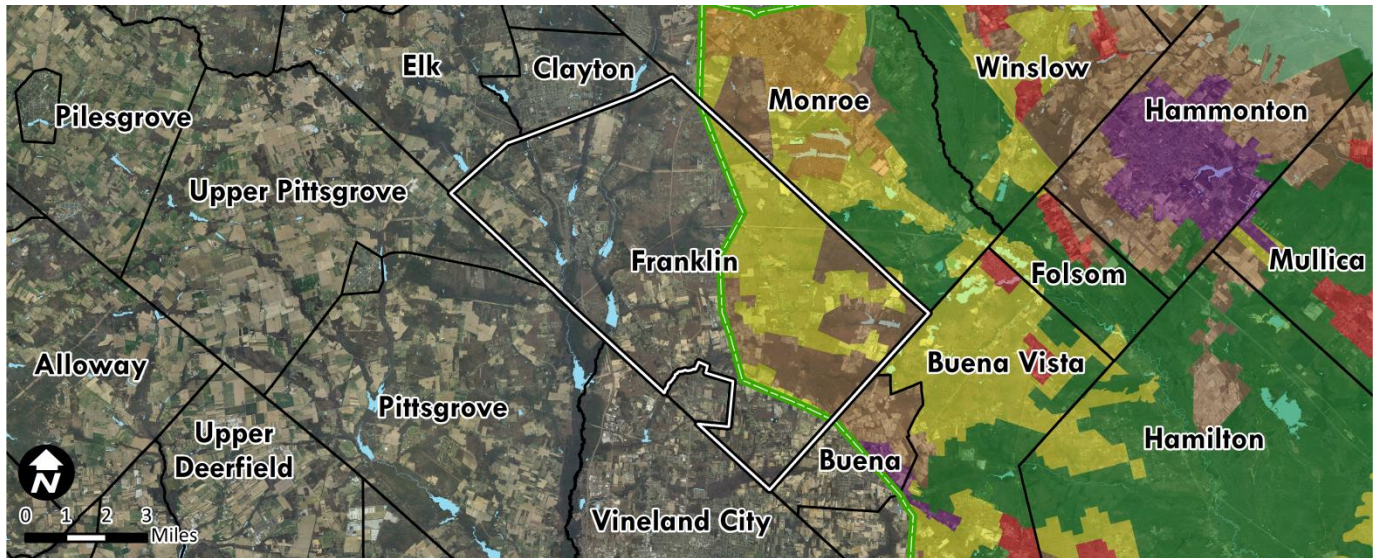


# Franklin Township

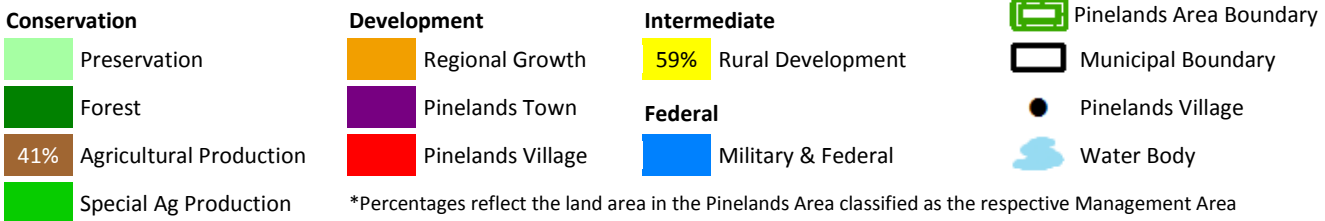


Pinelands Area 2010 population: 2,616 (16% of total population)

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

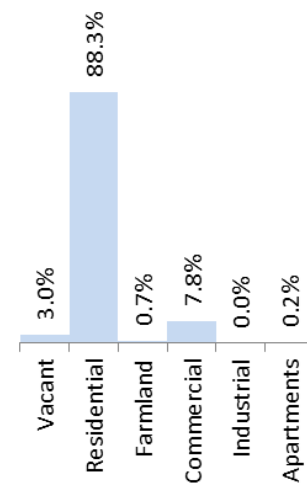


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	16,741	12,031	43
Population Density (per mile <sup>2</sup> )	297	1,773	151
Population Change - 2000 to 2012	8.2%	4.9%	60
% Land Protected in Pinelands Area*	31.9%	36.4%	28
Assessed Acres of Farmland	8,676	2,285	17
Building Permits Issued	18	22	53
Housing Transactions	56	62	62
Average Home Sale Price	\$203,832	\$273,524	103
Equalized Property Value (millions)	\$1,312.1	\$1,566.4	67
Effective Tax Rate	2.47	2.28	87
Average Residential Property Tax Bill	\$5,164	\$5,601	109
Per Capita Income Estimate	\$28,366	\$31,778	115
Unemployment Rate	12.7%	11.0%	60

Assessment Class Proportions in 2012 Municipal Valuations



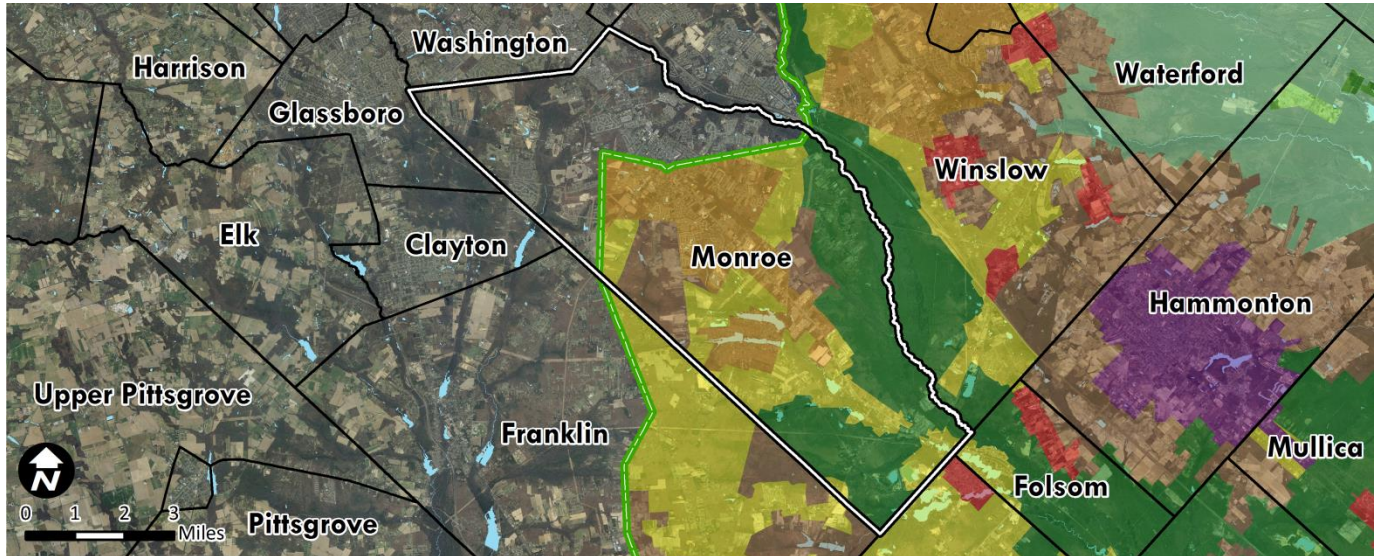
Private Sector Employment 1,542	Private Sector Establishments 224	Private Sector Avg. Annual Wages \$36,516
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

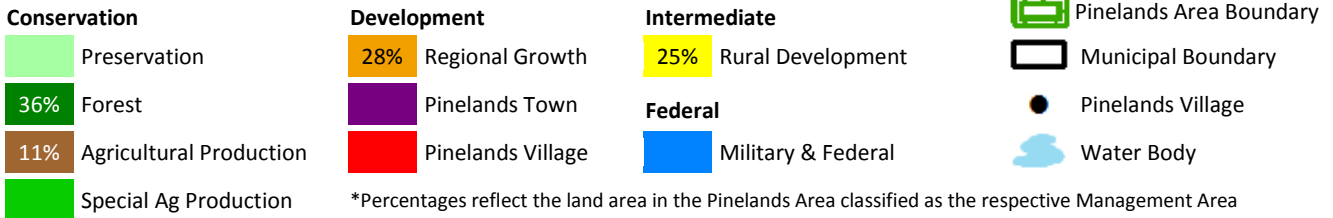
# Monroe Township

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

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

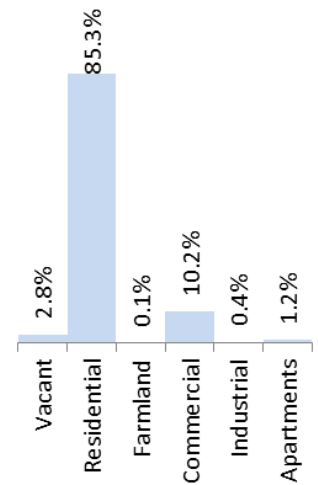


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	36,597	12,031	18
Population Density (per mile <sup>2</sup> )	781	1,773	117
Population Change - 2000 to 2012	26.3%	4.9%	20
% Land Protected in Pinelands Area*	24.6%	36.4%	33
Assessed Acres of Farmland	5,348	2,285	37
Building Permits Issued	61	22	25
Housing Transactions	167	62	21
Average Home Sale Price	\$204,910	\$273,524	102
Equalized Property Value (millions)	\$2,656.6	\$1,566.4	35
Effective Tax Rate	2.98	2.28	36
Average Residential Property Tax Bill	\$6,420	\$5,601	53
Per Capita Income Estimate	\$26,411	\$31,778	147
Unemployment Rate	10.4%	11.0%	100

Assessment Class Proportions in 2012 Municipal Valuations

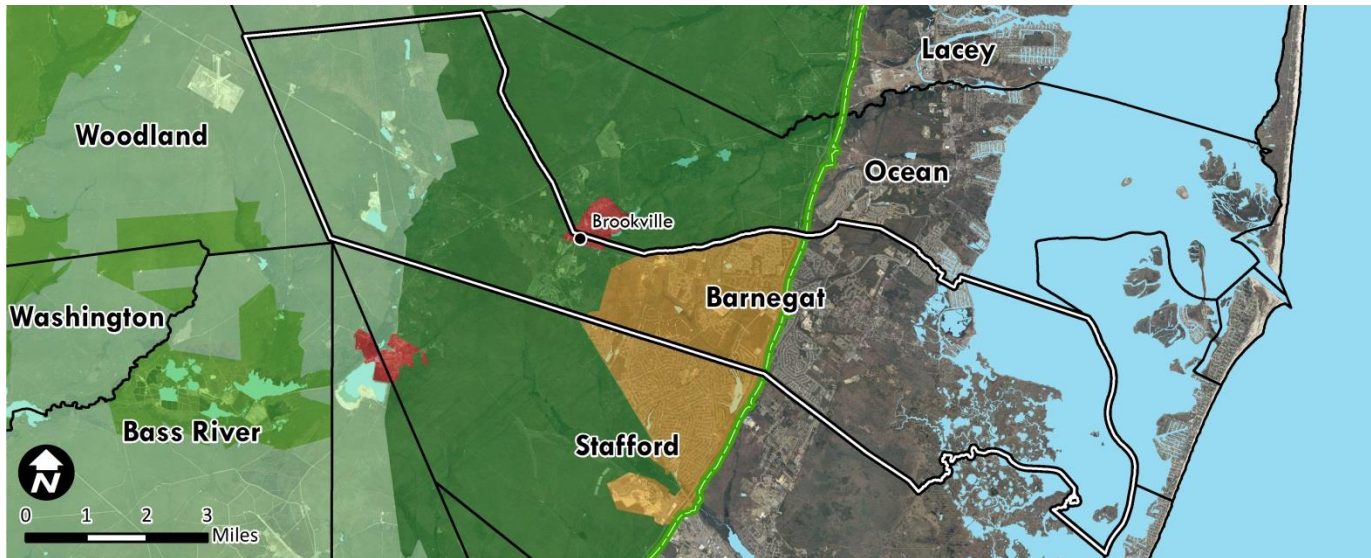


Private Sector Employment 5,518	Private Sector Establishments 598	Private Sector Avg. Annual Wages \$34,922
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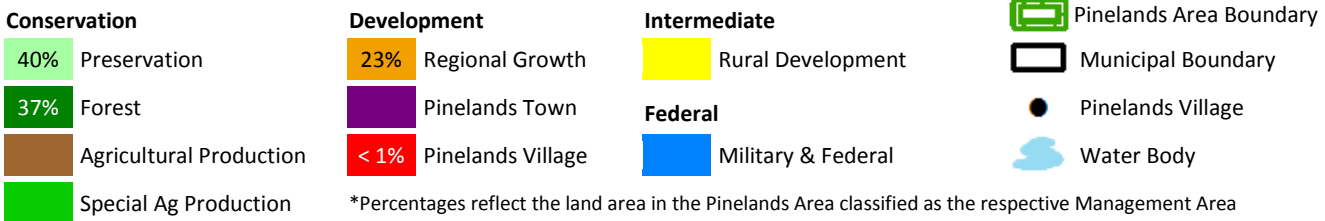
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Barnegat Township

Pinelands Area 2010 population: 7,187 (34% of total population)  
 Pinelands Area acreage: 14,357 (56% of total acreage)

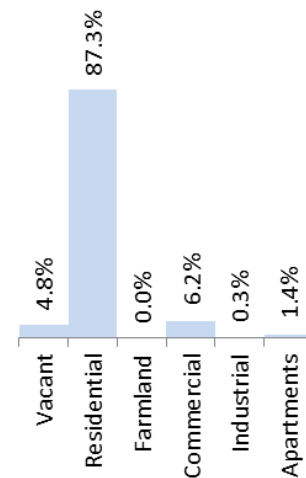


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	21,418	12,031	33
Population Density (per mile <sup>2</sup> )	533	1,773	129
Population Change - 2000 to 2012	40.3%	4.9%	10
% Land Protected in Pinelands Area*	61.2%	36.4%	14
Assessed Acres of Farmland	192	2,285	97
Building Permits Issued	161	22	3
Housing Transactions	89	62	44
Average Home Sale Price	\$238,356	\$273,524	76
Equalized Property Value (millions)	\$2,369.2	\$1,566.4	41
Effective Tax Rate	2.18	2.28	117
Average Residential Property Tax Bill	\$5,660	\$5,601	81
Per Capita Income Estimate	\$27,224	\$31,778	130
Unemployment Rate	9.7%	11.0%	117

Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
1,623	255	\$35,557

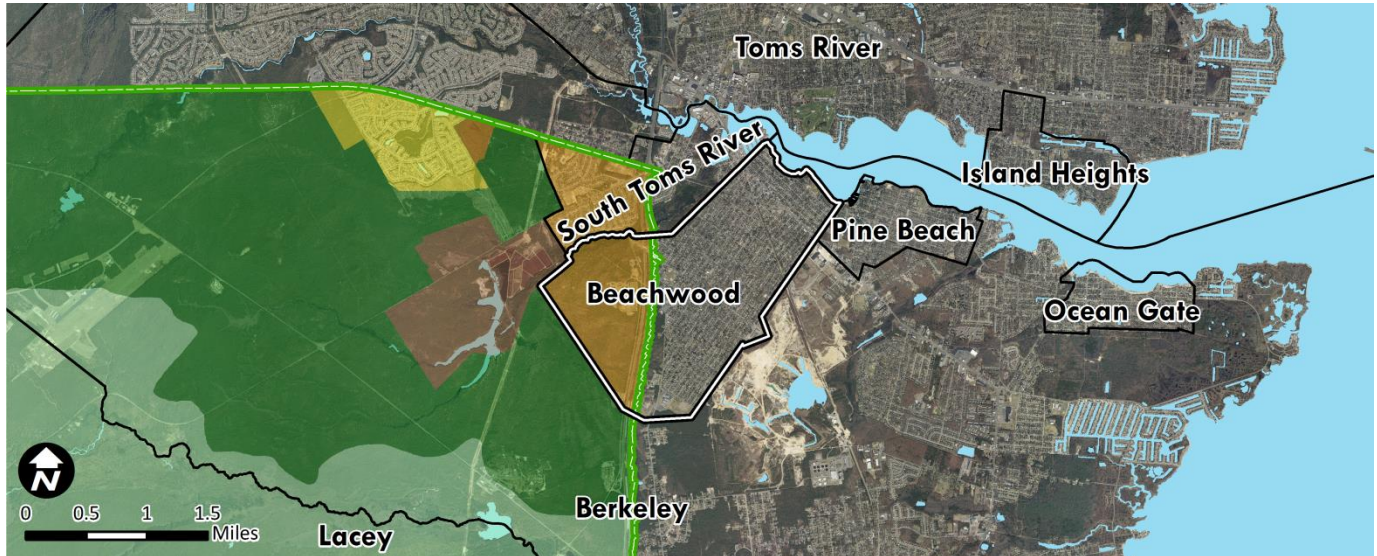
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Beachwood Borough

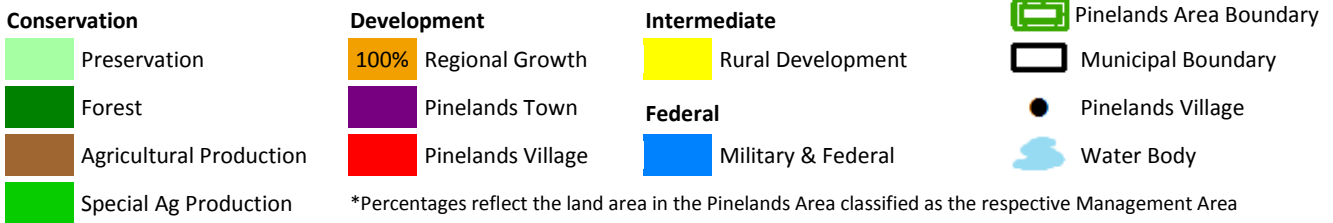


Pinelands Area 2010 population: 2 (< 1% of total population)

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

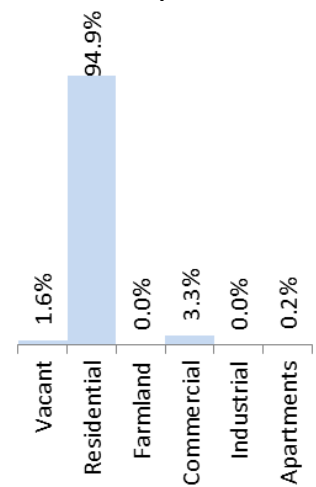


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	11,100	12,031	59
Population Density (per mile <sup>2</sup> )	4,006	1,773	26
Population Change - 2000 to 2012	7.0%	4.9%	67
% Land Protected in Pinelands Area*	67.6%	36.4%	11
Assessed Acres of Farmland	0	2,285	122
Building Permits Issued	4	22	114
Housing Transactions	31	62	96
Average Home Sale Price	\$217,981	\$273,524	89
Equalized Property Value (millions)	\$923.8	\$1,566.4	88
Effective Tax Rate	1.82	2.28	152
Average Residential Property Tax Bill	\$4,476	\$5,601	145
Per Capita Income Estimate	\$28,376	\$31,778	114
Unemployment Rate	11.0%	11.0%	89

Assessment Class Proportions in 2012 Municipal Valuation



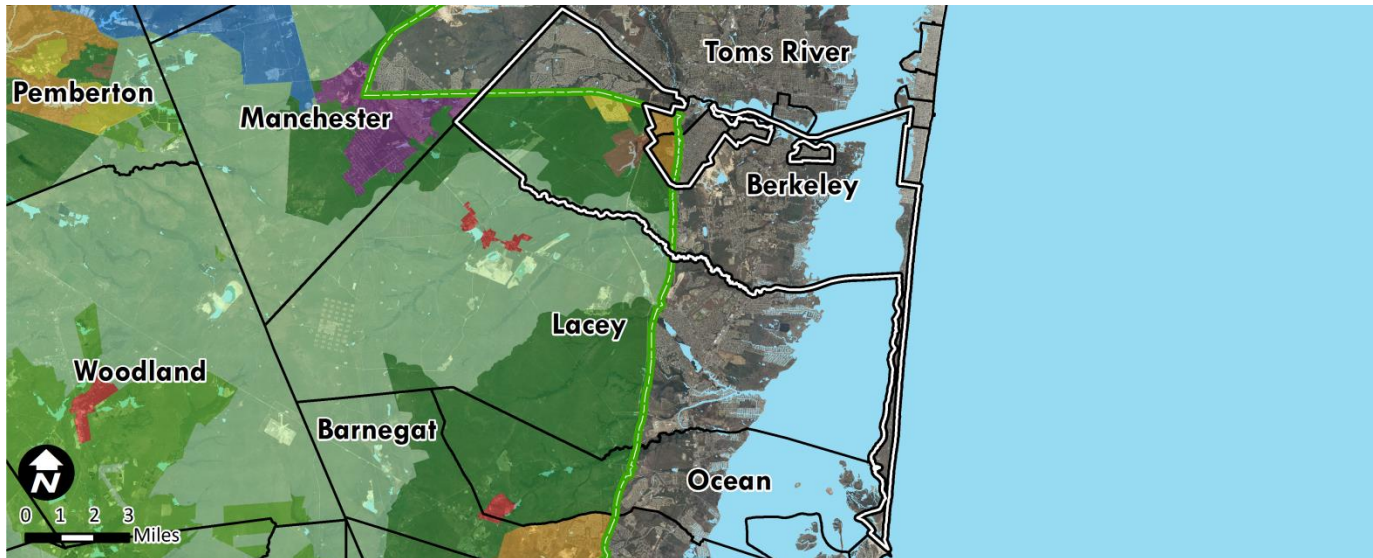
Private Sector Employment 595	Private Sector Establishments 102	Private Sector Avg. Annual Wages \$33,141
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# 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

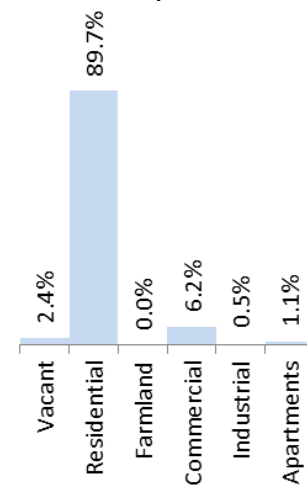
Pinelands Village

Water Body

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

2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	41,498	12,031	14
Population Density (per mile <sup>2</sup> )	764	1,773	118
Population Change - 2000 to 2012	3.8%	4.9%	85
% Land Protected in Pinelands Area*	74.4%	36.4%	8
Assessed Acres of Farmland	88	2,285	106
Building Permits Issued	71	22	18
Housing Transactions	319	62	8
Average Home Sale Price	\$194,288	\$273,524	115
Equalized Property Value (millions)	\$5,275.4	\$1,566.4	11
Effective Tax Rate	1.71	2.28	157
Average Residential Property Tax Bill	\$3,728	\$5,601	179
Per Capita Income Estimate	\$30,507	\$31,778	94
Unemployment Rate	15.6%	11.0%	27

## Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment 3,109	Private Sector Establishments 368	Private Sector Avg. Annual Wages \$32,640
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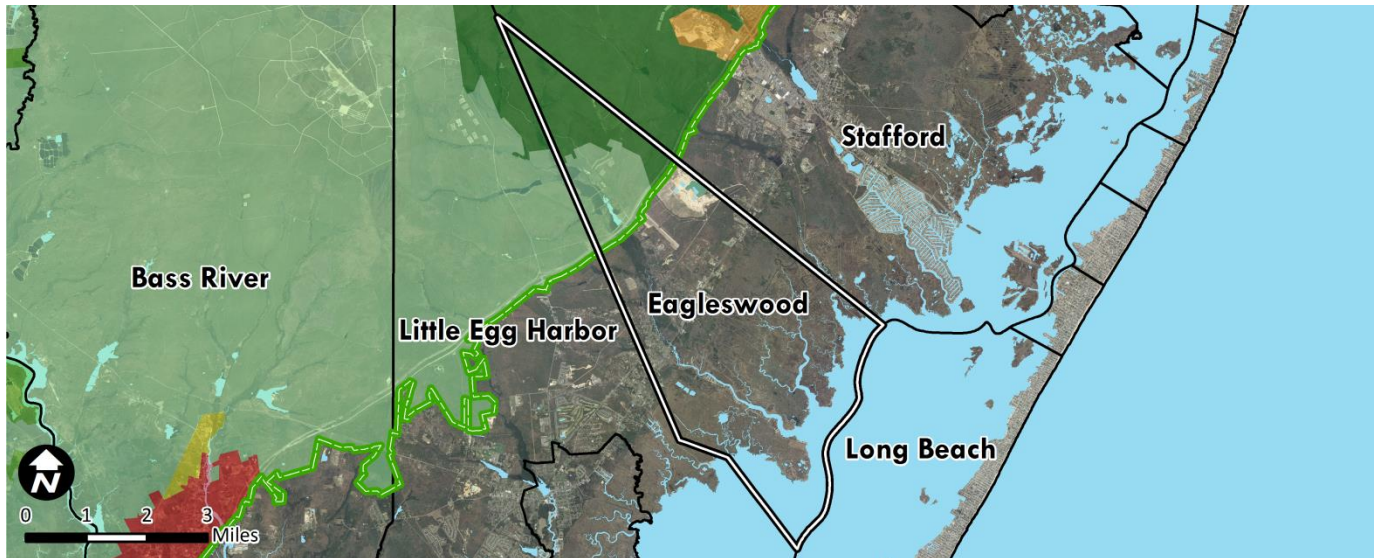
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Eagleswood Township

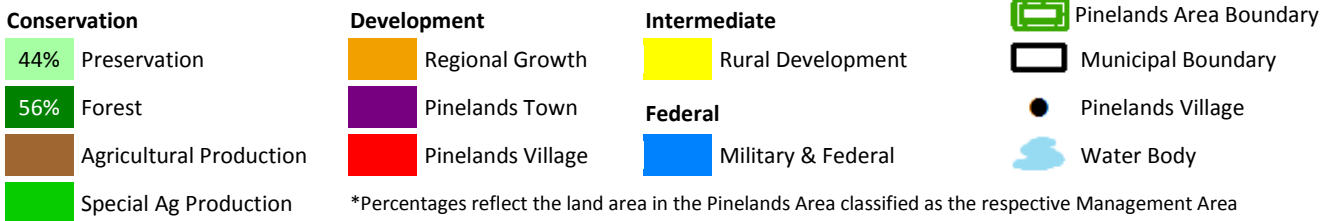


Pinelands Area 2010 population: 0 (0% of total population)

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

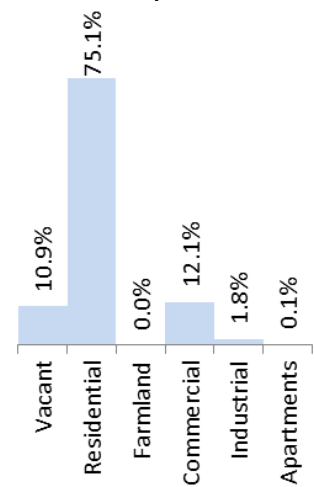


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,650	12,031	169
Population Density (per mile <sup>2</sup> )	88	1,773	186
Population Change - 2000 to 2012	14.5%	4.9%	40
% Land Protected in Pinelands Area*	88.1%	36.4%	1
Assessed Acres of Farmland	287	2,285	88
Building Permits Issued	11	22	75
Housing Transactions	5	62	166
Average Home Sale Price	\$242,000	\$273,524	72
Equalized Property Value (millions)	\$257.6	\$1,566.4	153
Effective Tax Rate	1.85	2.28	146
Average Residential Property Tax Bill	\$5,287	\$5,601	95
Per Capita Income Estimate	\$27,023	\$31,778	137
Unemployment Rate	9.5%	11.0%	121

Assessment Class Proportions in 2012 Municipal Valuations

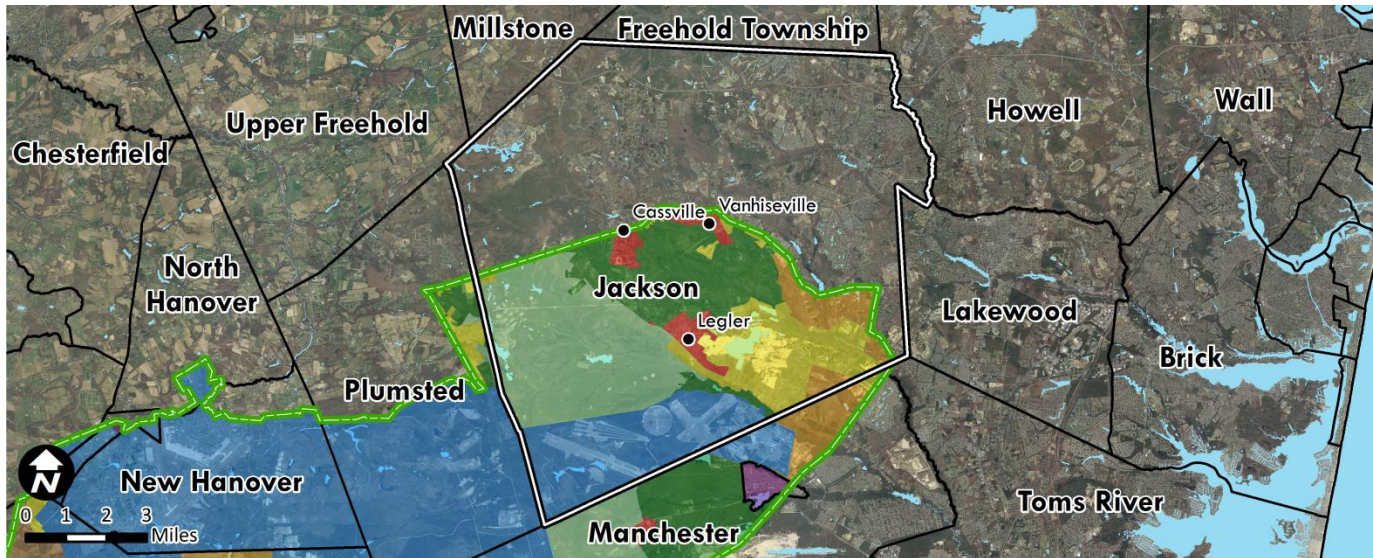


Private Sector Employment 728	Private Sector Establishments 87	Private Sector Avg. Annual Wages \$64,298
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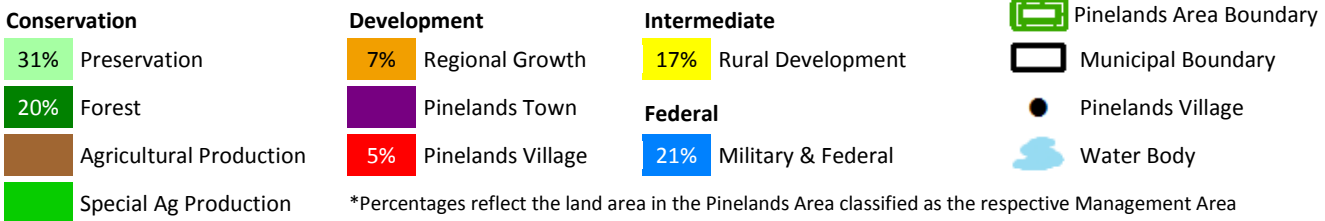
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Jackson Township

Pinelands Area 2010 population: 4,832 (9% of total population)  
 Pinelands Area acreage: 30,385 (47% of total acreage)

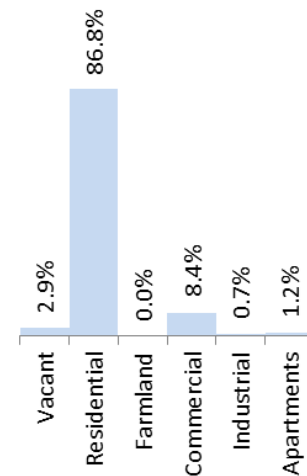


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	55,616	12,031	8
Population Density (per mile <sup>2</sup> )	552	1,773	128
Population Change - 2000 to 2012	29.9%	4.9%	17
% Land Protected in Pinelands Area*	48.7%	36.4%	22
Assessed Acres of Farmland	4,259	2,285	45
Building Permits Issued	45	22	37
Housing Transactions	311	62	9
Average Home Sale Price	\$310,746	\$273,524	37
Equalized Property Value (millions)	\$6,687.2	\$1,566.4	9
Effective Tax Rate	1.95	2.28	138
Average Residential Property Tax Bill	\$6,482	\$5,601	50
Per Capita Income Estimate	\$34,443	\$31,778	60
Unemployment Rate	9.2%	11.0%	127

## Assessment Class Proportions in 2012 Municipal Valuations



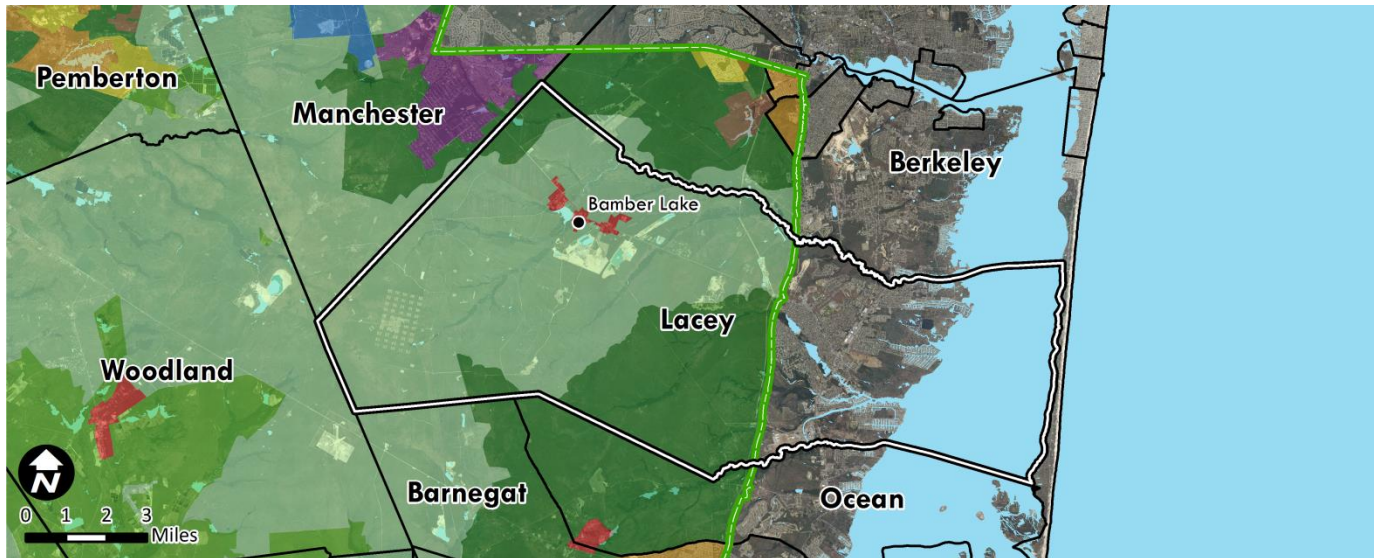
Private Sector Employment 8,811	Private Sector Establishments 898	Private Sector Avg. Annual Wages \$28,442
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

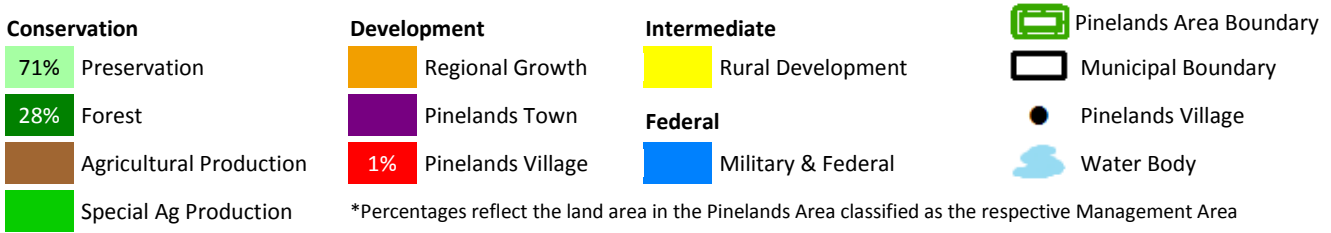
# Lacey Township



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

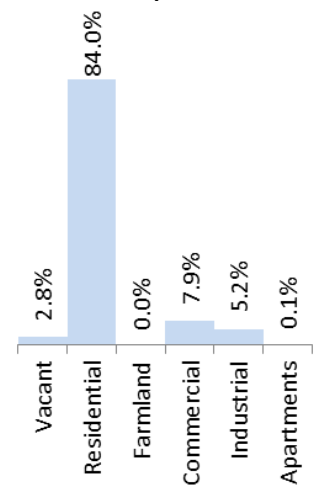


### Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	27,825	12,031	25
Population Density (per mile <sup>2</sup> )	279	1,773	153
Population Change - 2000 to 2012	9.8%	4.9%	53
% Land Protected in Pinelands Area*	75.9%	36.4%	7
Assessed Acres of Farmland	6,295	2,285	34
Building Permits Issued	50	22	32
Housing Transactions	129	62	28
Average Home Sale Price	\$310,013	\$273,524	38
Equalized Property Value (millions)	\$3,981.7	\$1,566.4	21
Effective Tax Rate	1.61	2.28	161
Average Residential Property Tax Bill	\$4,822	\$5,601	123
Per Capita Income Estimate	\$29,330	\$31,778	106
Unemployment Rate	10.2%	11.0%	104

Assessment Class Proportions in 2012 Municipal Valuations



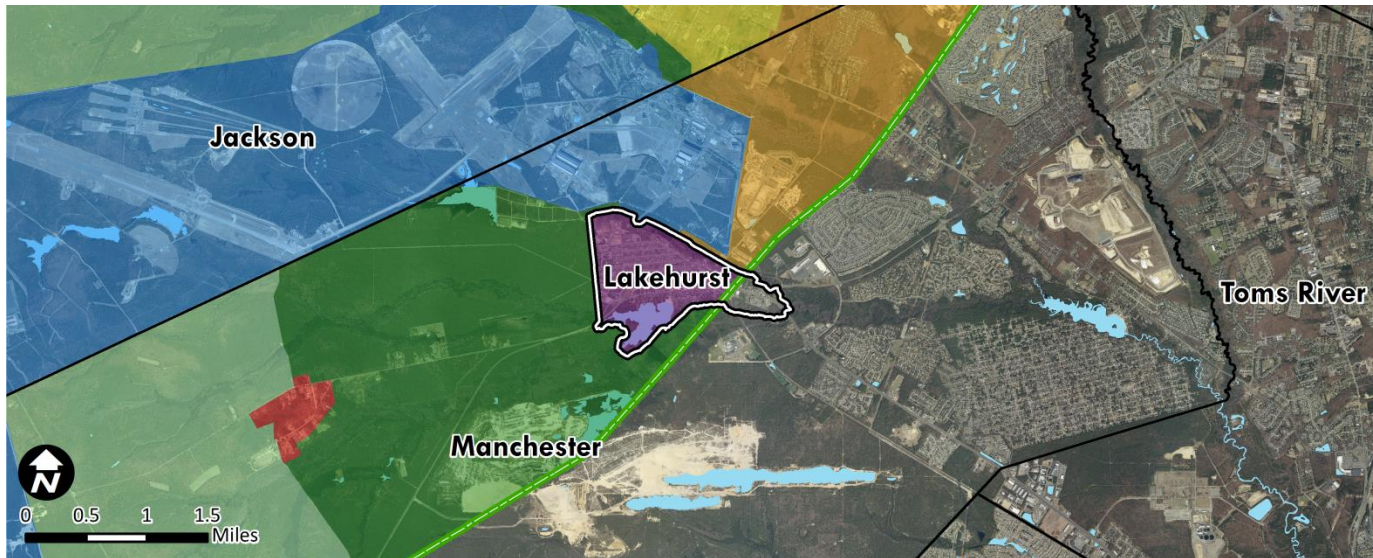
Private Sector Employment 5,099	Private Sector Establishments 537	Private Sector Avg. Annual Wages \$41,849
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

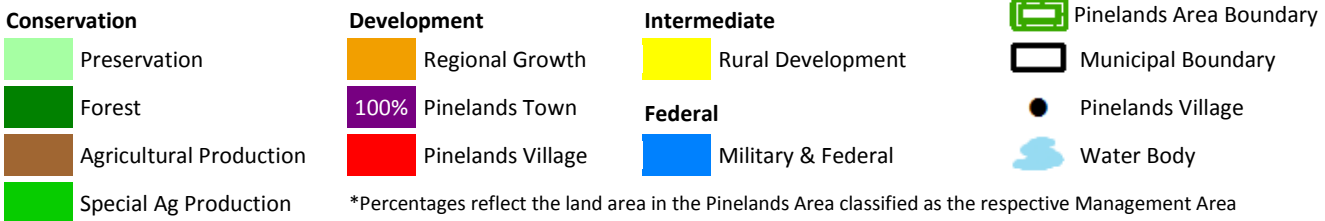


# Lakehurst Borough

Pinelands Area 2010 population: 2,535 (96% of total population)  
 Pinelands Area acreage: 551 (87% of total acreage)

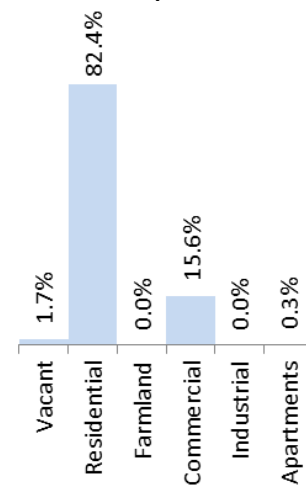


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,664	12,031	150
Population Density (per mile <sup>2</sup> )	2,694	1,773	53
Population Change - 2000 to 2012	5.6%	4.9%	73
% Land Protected in Pinelands Area*	13.0%	36.4%	38
Assessed Acres of Farmland	0	2,285	122
Building Permits Issued	7	22	91
Housing Transactions	5	62	166
Average Home Sale Price	\$241,380	\$273,524	73
Equalized Property Value (millions)	\$201.3	\$1,566.4	169
Effective Tax Rate	2.10	2.28	129
Average Residential Property Tax Bill	\$4,456	\$5,601	147
Per Capita Income Estimate	\$23,225	\$31,778	171
Unemployment Rate	14.9%	11.0%	34

## Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
765	91	\$46,321

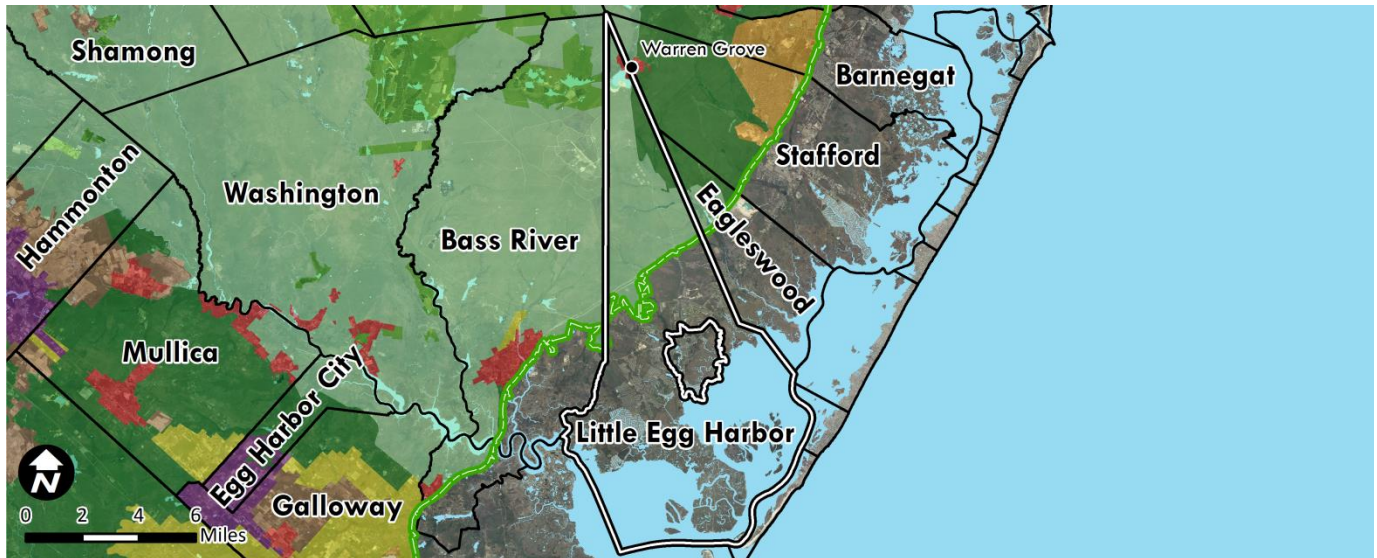
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Little Egg Harbor Township

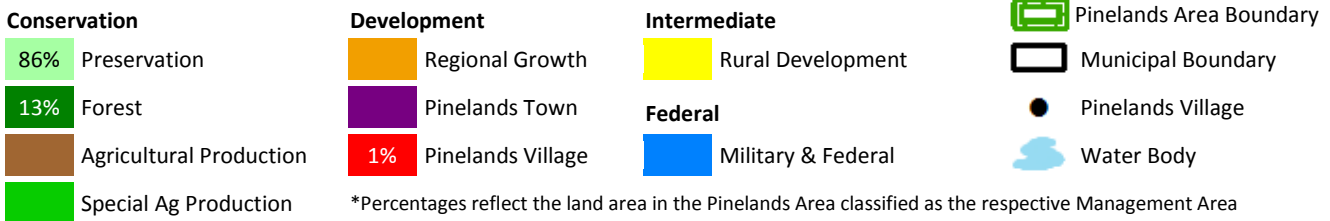


Pinelands Area 2010 population: 203 (1% of total population)

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

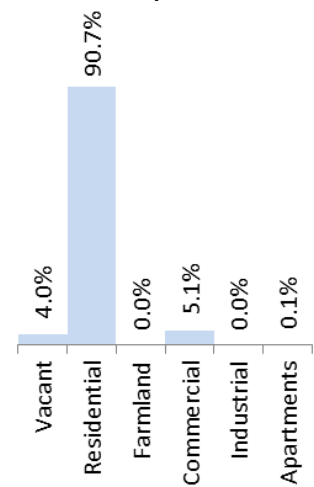


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	20,336	12,031	36
Population Density (per mile <sup>2</sup> )	277	1,773	154
Population Change - 2000 to 2012	27.5%	4.9%	18
% Land Protected in Pinelands Area*	86.9%	36.4%	2
Assessed Acres of Farmland	543	2,285	82
Building Permits Issued	57	22	28
Housing Transactions	126	62	30
Average Home Sale Price	\$209,204	\$273,524	97
Equalized Property Value (millions)	\$2,545.5	\$1,566.4	36
Effective Tax Rate	1.86	2.28	145
Average Residential Property Tax Bill	\$4,498	\$5,601	143
Per Capita Income Estimate	\$27,180	\$31,778	131
Unemployment Rate	11.9%	11.0%	69

Assessment Class Proportions in 2012 Municipal Valuations

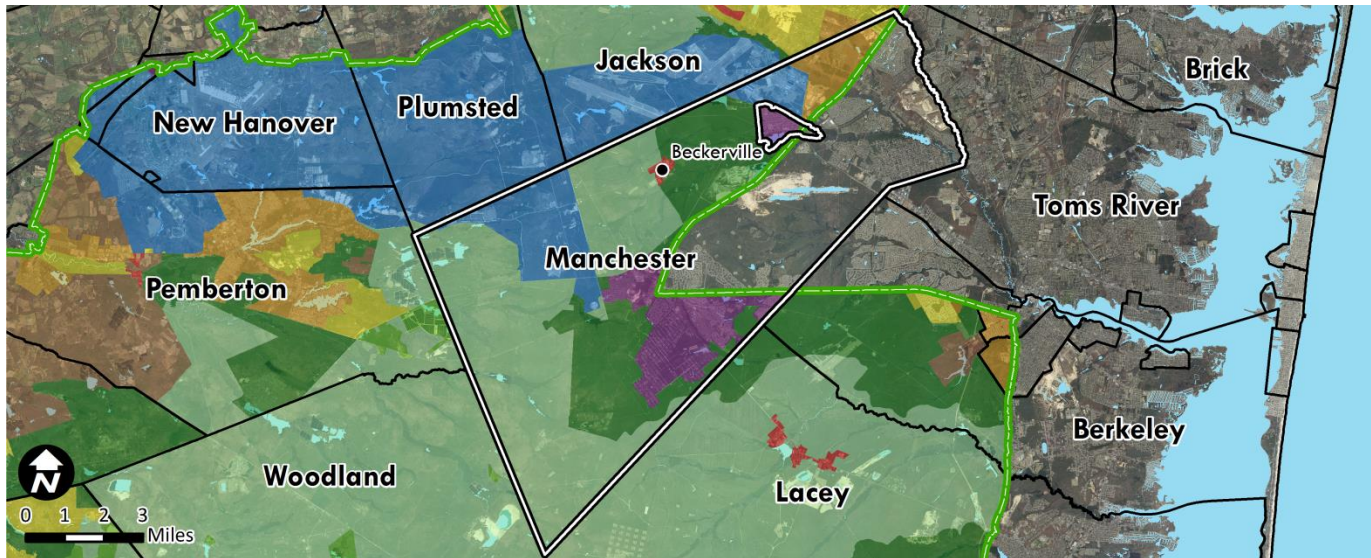


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
1,607	212	\$28,756

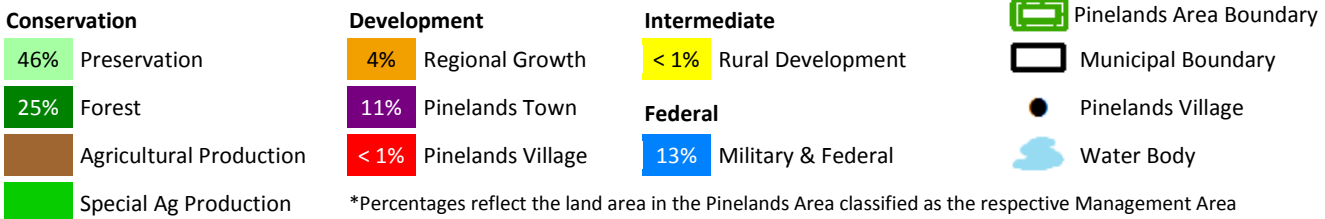
\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

# Manchester Township

Pinelands Area 2010 population: 12,286 (29% of total population)  
 Pinelands Area acreage: 38,728 (73% of total acreage)

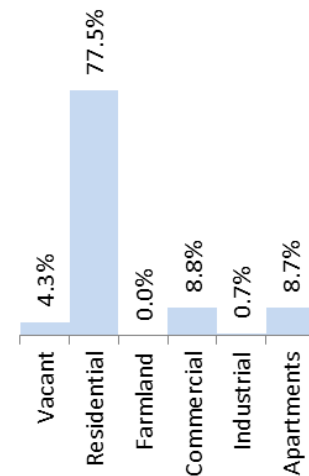


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	43,043	12,031	12
Population Density (per mile <sup>2</sup> )	520	1,773	131
Population Change - 2000 to 2012	10.6%	4.9%	50
% Land Protected in Pinelands Area*	51.5%	36.4%	16
Assessed Acres of Farmland	3,781	2,285	49
Building Permits Issued	1	22	146
Housing Transactions	210	62	15
Average Home Sale Price	\$173,162	\$273,524	134
Equalized Property Value (millions)	\$3,718.5	\$1,566.4	24
Effective Tax Rate	1.93	2.28	140
Average Residential Property Tax Bill	\$3,743	\$5,601	178
Per Capita Income Estimate	\$32,393	\$31,778	79
Unemployment Rate	14.5%	11.0%	37

Assessment Class Proportions in 2012 Municipal Valuations



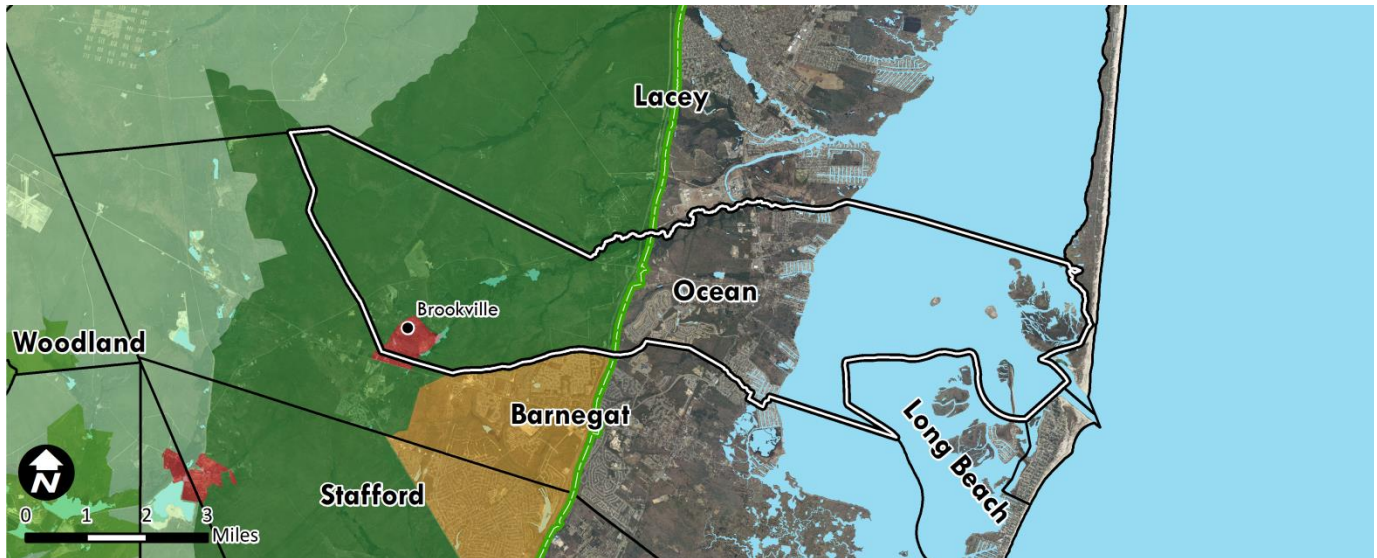
Private Sector Employment 3,637	Private Sector Establishments 294	Private Sector Avg. Annual Wages \$32,808
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\*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey.

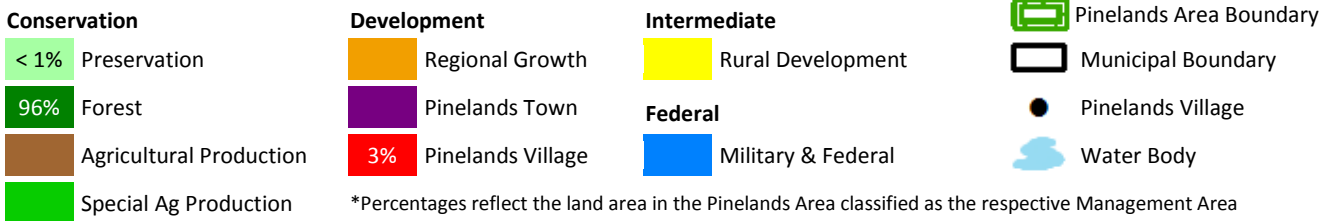
# Ocean Township



Pinelands Area 2010 population: 140 (2% of total population)  
 Pinelands Area acreage: 8,233 (41% of total acreage)

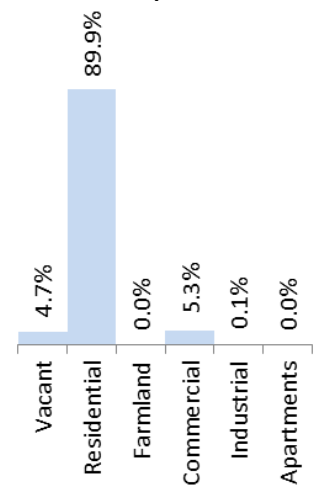


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	8,518	12,031	79
Population Density (per mile <sup>2</sup> )	269	1,773	155
Population Change - 2000 to 2012	32.1%	4.9%	14
% Land Protected in Pinelands Area*	49.6%	36.4%	20
Assessed Acres of Farmland	1,892	2,285	62
Building Permits Issued	64	22	20
Housing Transactions	20	62	119
Average Home Sale Price	\$293,318	\$273,524	50
Equalized Property Value (millions)	\$1,355.1	\$1,566.4	66
Effective Tax Rate	1.52	2.28	169
Average Residential Property Tax Bill	\$4,528	\$5,601	140
Per Capita Income Estimate	\$34,442	\$31,778	61
Unemployment Rate	13.4%	11.0%	53

Assessment Class Proportions in 2012 Municipal Valuations

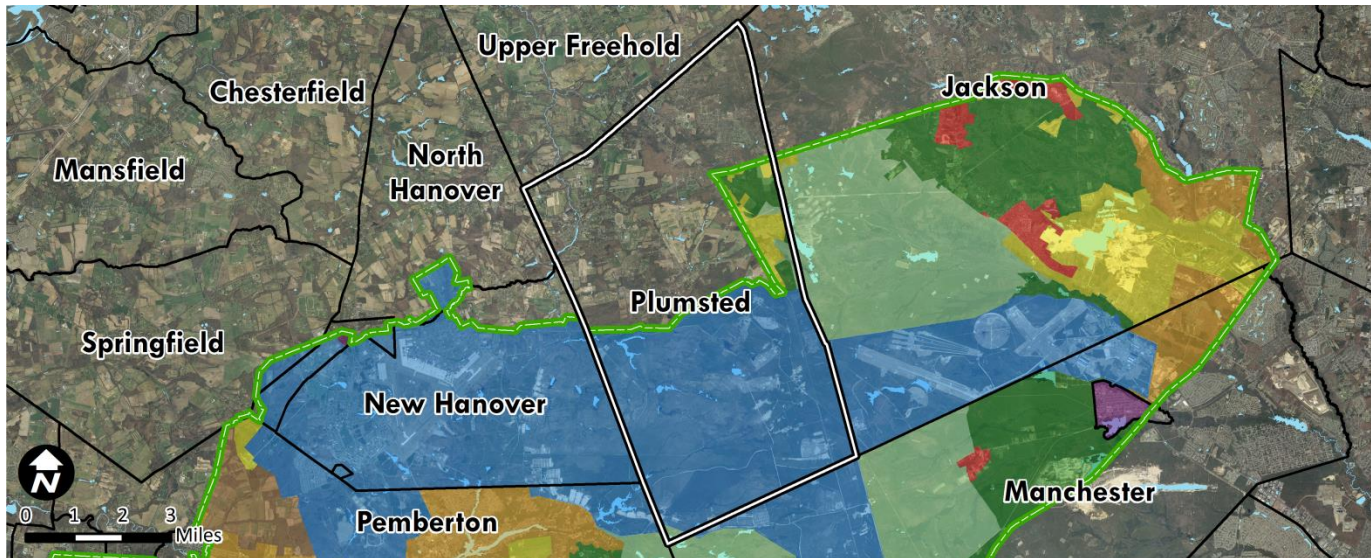


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
929	104	\$29,253

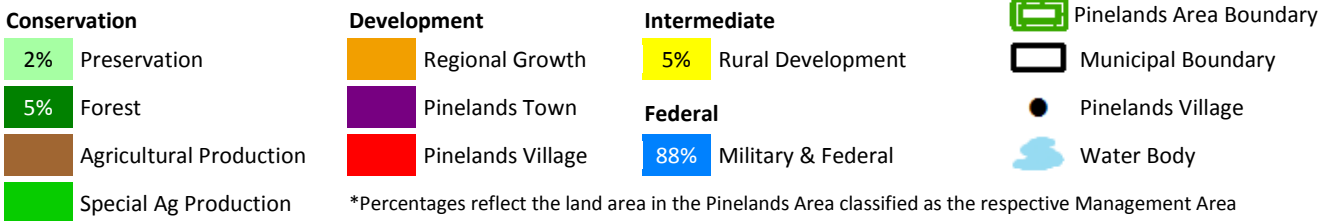
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# Plumsted Township

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

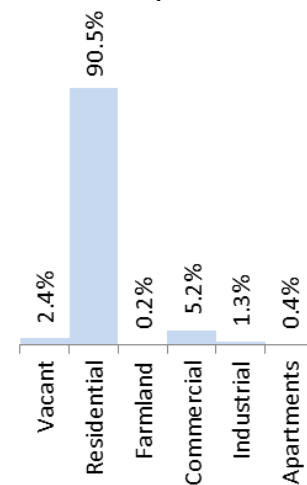


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	8,519	12,031	78
Population Density (per mile <sup>2</sup> )	216	1,773	166
Population Change - 2000 to 2012	17.1%	4.9%	33
% Land Protected in Pinelands Area*	5.7%	36.4%	42
Assessed Acres of Farmland	5,063	2,285	40
Building Permits Issued	16	22	60
Housing Transactions	31	62	96
Average Home Sale Price	\$302,796	\$273,524	43
Equalized Property Value (millions)	\$876.5	\$1,566.4	90
Effective Tax Rate	1.80	2.28	153
Average Residential Property Tax Bill	\$5,756	\$5,601	79
Per Capita Income Estimate	\$29,842	\$31,778	102
Unemployment Rate	7.2%	11.0%	176

## Assessment Class Proportions in 2012 Municipal Valuations

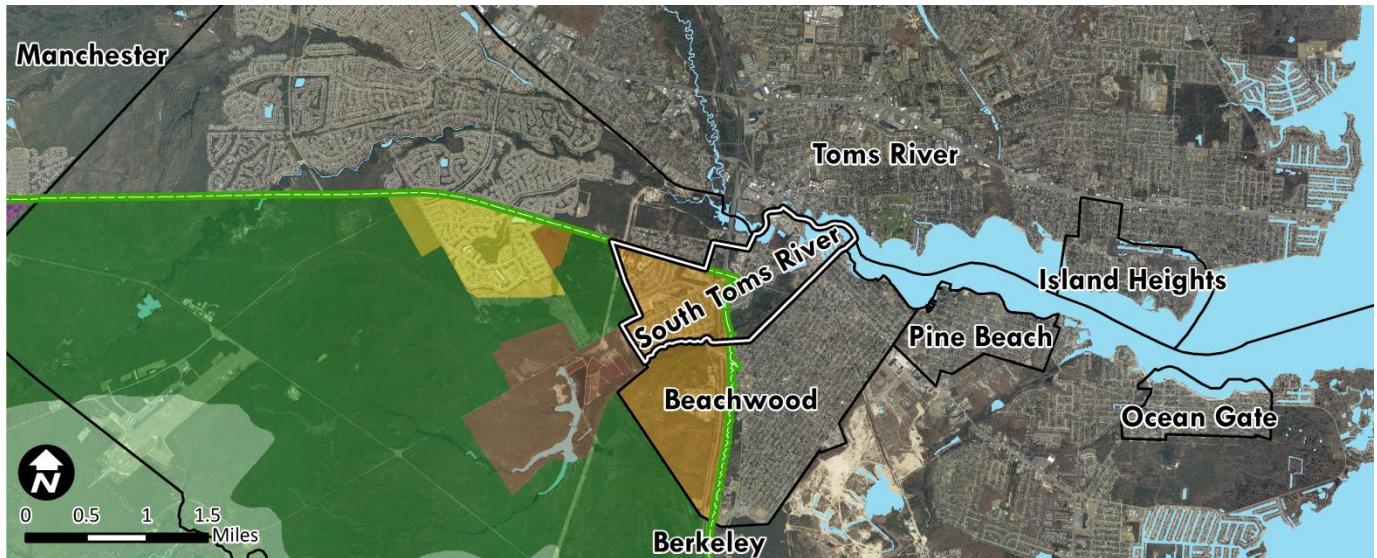


Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
721	126	\$30,847

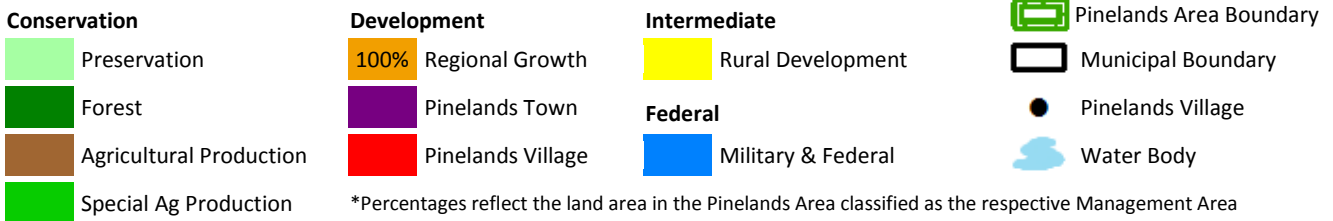
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# South Toms River Borough

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

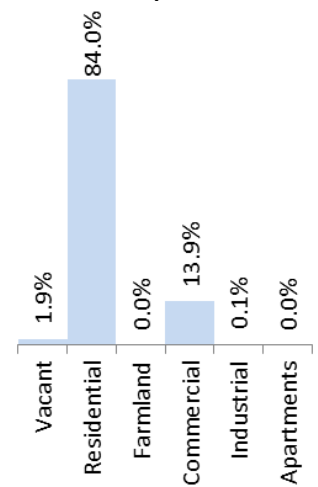


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	3,696	12,031	130
Population Density (per mile <sup>2</sup> )	2,964	1,773	45
Population Change - 2000 to 2012	1.7%	4.9%	99
% Land Protected in Pinelands Area*	0.0%	36.4%	46
Assessed Acres of Farmland	0	2,285	122
Building Permits Issued	0	22	169
Housing Transactions	3	62	179
Average Home Sale Price	\$142,000	\$273,524	176
Equalized Property Value (millions)	\$232.8	\$1,566.4	164
Effective Tax Rate	2.16	2.28	122
Average Residential Property Tax Bill	\$4,295	\$5,601	157
Per Capita Income Estimate	\$20,504	\$31,778	187
Unemployment Rate	17.1%	11.0%	17

Assessment Class Proportions in 2012 Municipal Valuations

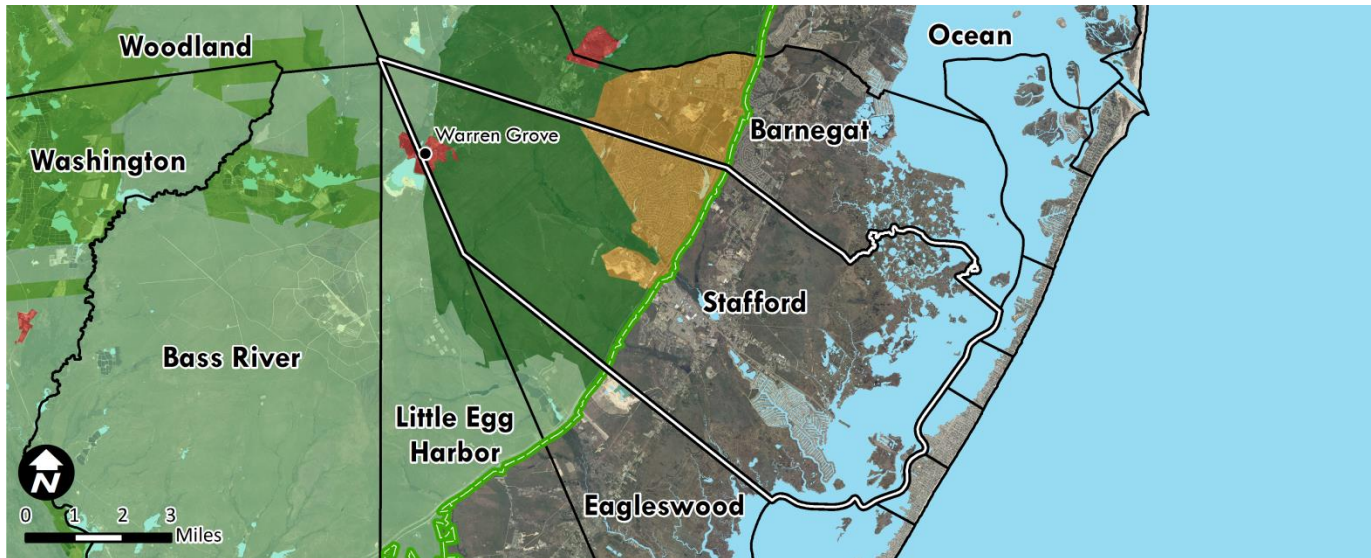


Private Sector Employment 427	Private Sector Establishments 59	Private Sector Avg. Annual Wages \$32,812
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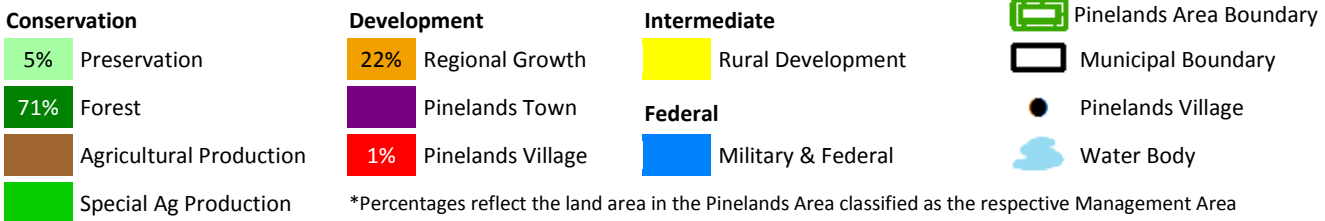
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# Stafford Township

Pinelands Area 2010 population: 15,678 (59% of total population)  
 Pinelands Area acreage: 13,709 (39% of total acreage)

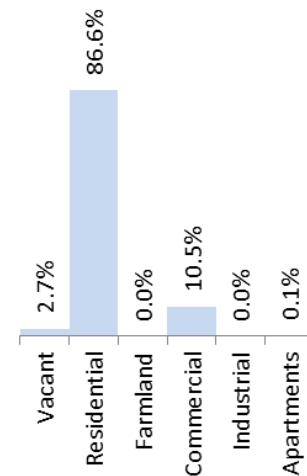


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	26,945	12,031	26
Population Density (per mile <sup>2</sup> )	493	1,773	134
Population Change - 2000 to 2012	19.6%	4.9%	28
% Land Protected in Pinelands Area*	69.7%	36.4%	9
Assessed Acres of Farmland	450	2,285	83
Building Permits Issued	130	22	7
Housing Transactions	237	62	12
Average Home Sale Price	\$270,221	\$273,524	58
Equalized Property Value (millions)	\$4,225.5	\$1,566.4	17
Effective Tax Rate	1.83	2.28	150
Average Residential Property Tax Bill	\$5,728	\$5,601	80
Per Capita Income Estimate	\$31,664	\$31,778	85
Unemployment Rate	10.3%	11.0%	102

Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment 7,403	Private Sector Establishments 630	Private Sector Avg. Annual Wages \$34,077
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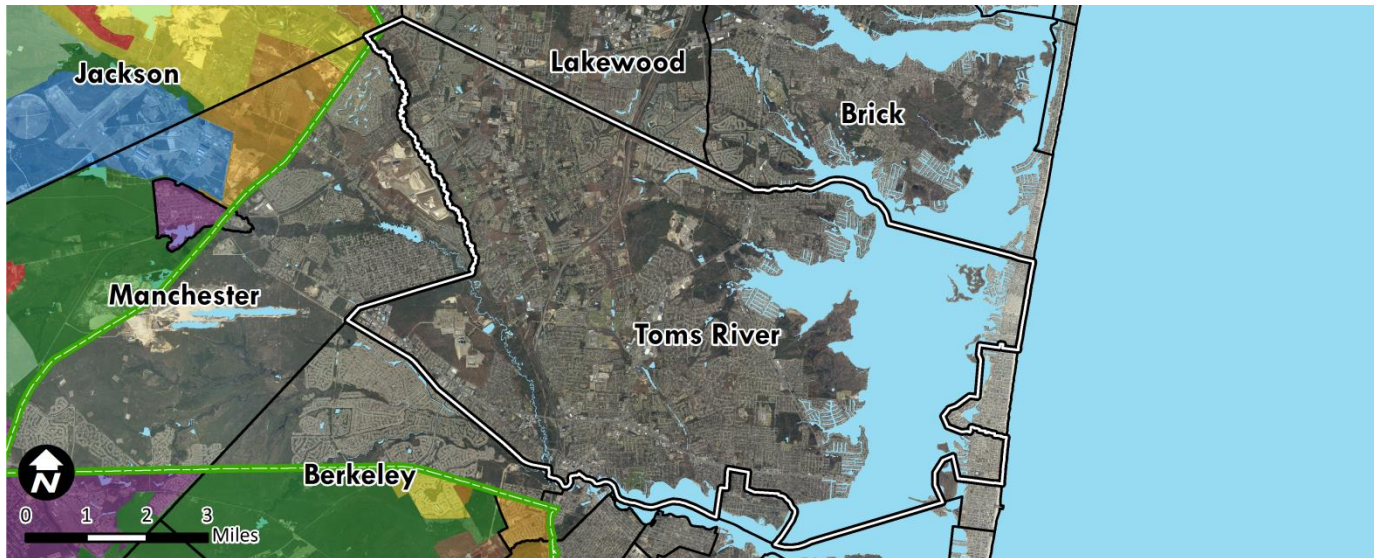
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# Toms River Township

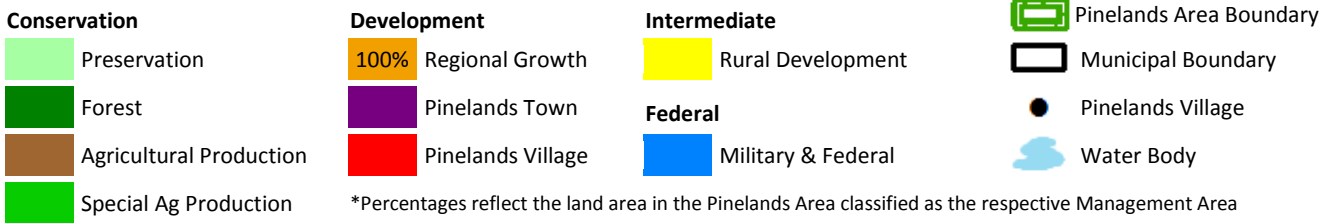


Pinelands Area 2010 population: 0 (0% of total population)

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

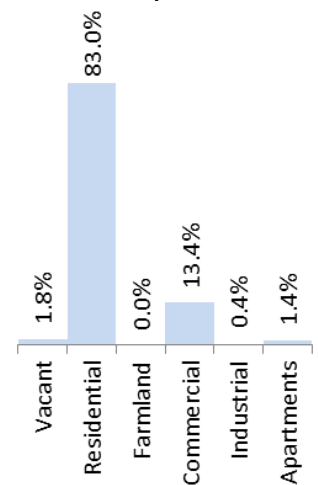


## Pinelands Management Areas



2012 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	92,093	12,031	2
Population Density (per mile <sup>2</sup> )	1,727	1,773	81
Population Change - 2000 to 2012	2.7%	4.9%	87
% Land Protected in Pinelands Area*	82.7%	36.4%	4
Assessed Acres of Farmland	297	2,285	87
Building Permits Issued	76	22	14
Housing Transactions	508	62	2
Average Home Sale Price	\$345,132	\$273,524	28
Equalized Property Value (millions)	\$16,064.6	\$1,566.4	1
Effective Tax Rate	1.57	2.28	164
Average Residential Property Tax Bill	\$5,460	\$5,601	87
Per Capita Income Estimate	\$35,415	\$31,778	54
Unemployment Rate	10.0%	11.0%	109

Assessment Class Proportions in 2012 Municipal Valuations



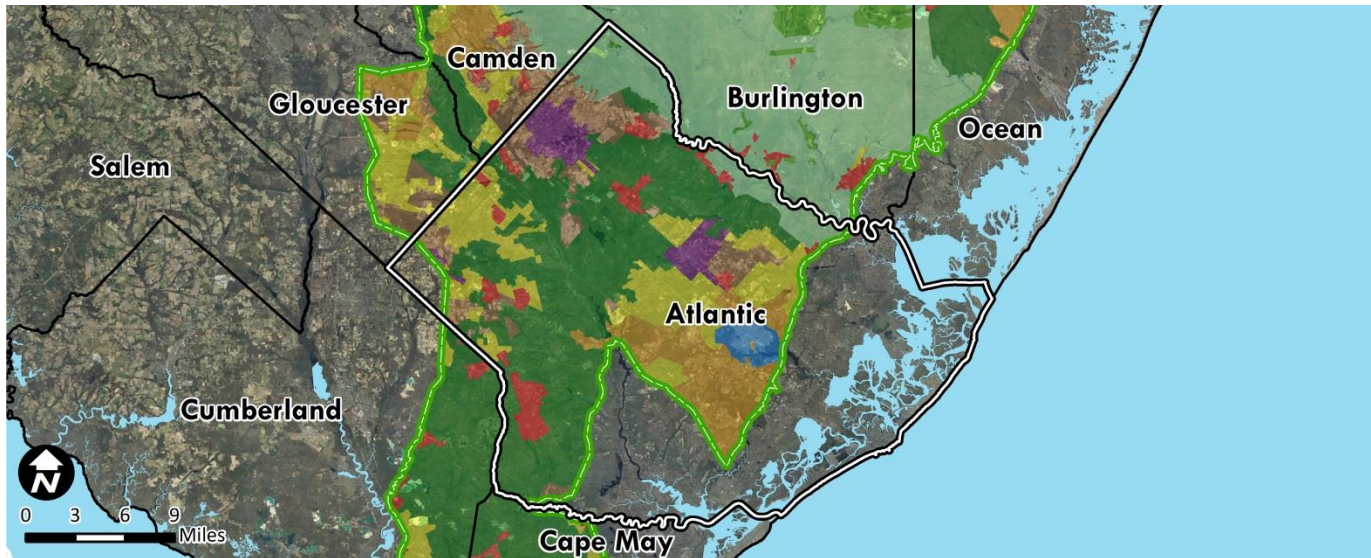
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
31,324	2,737	\$39,224

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



# Atlantic County

Pinelands Area 2010 population: 105,670 (38% of total population)  
 Pinelands Area acreage: 247,877 (63% of total acreage)



## Pinelands Management Areas

### Conservation

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

### Development

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

### Intermediate

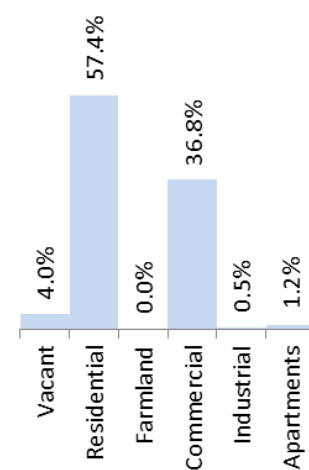
- 17% Rural Development
- Federal**
- 2% Military & Federal

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

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

2012 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	275,422	303,777	5
Population Density (per mile <sup>2</sup> )	451	714	5
Population Change - 2000 to 2012	9.1%	6.0%	3
% Land Protected in Pinelands Area*	29.1%	45.9%	6
Assessed Acres of Farmland	40,562	57,693	5
Building Permits Issued	441	557	6
Housing Transactions	1,538	1,577	5
Average Home Sale Price	\$278,220	\$274,799	3
Equalized Property Value (millions)	\$45,925.7	\$39,542.2	4
Average Effective Tax Rate	2.08	2.23	6
Average Residential Property Tax Bill	\$5,464	\$5,239	5
Per Capita Income Estimate	\$26,939	\$29,391	7
Unemployment Rate	13.5%	11.5%	2

## Assessment Class Proportions in 2012 Municipal Valuations

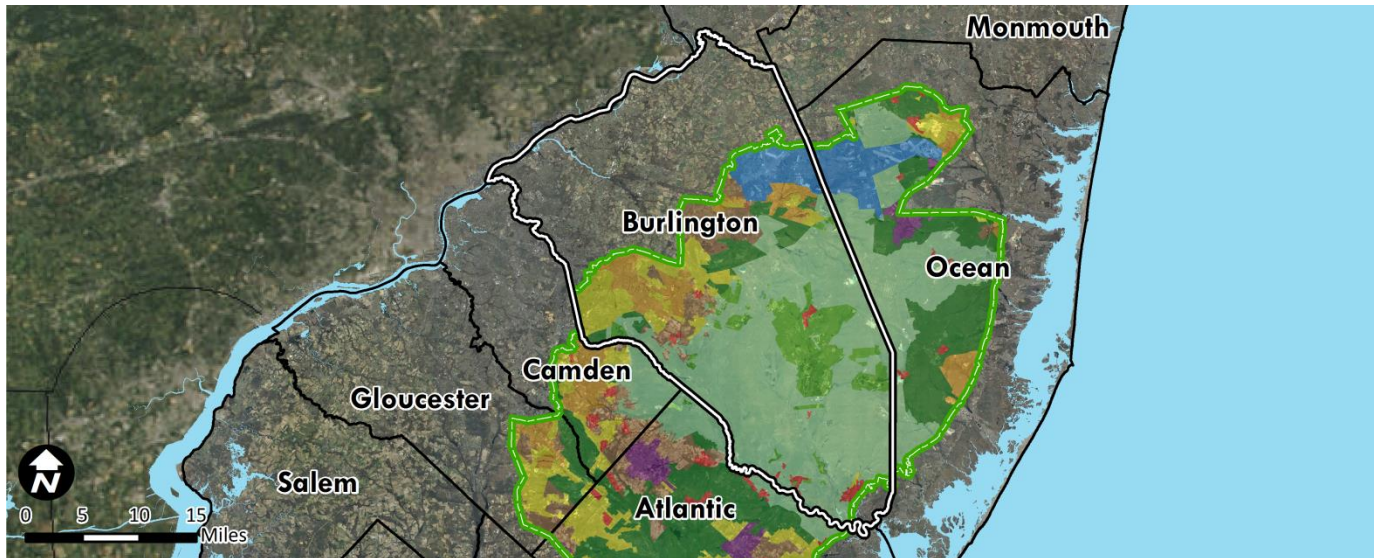


Private Sector Employment 112,144	Private Sector Establishments 6,333	Private Sector Avg. Annual Wages \$36,850
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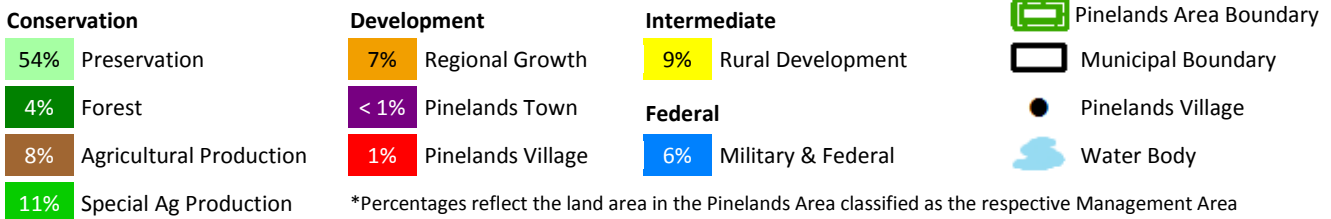
\*This Figure captures the 7 Pinelands Area counties only, not Salem County.

# Burlington County

Pinelands Area 2010 population: 96,383 (21% of total population)  
 Pinelands Area acreage: 334,224 (64% of total acreage)

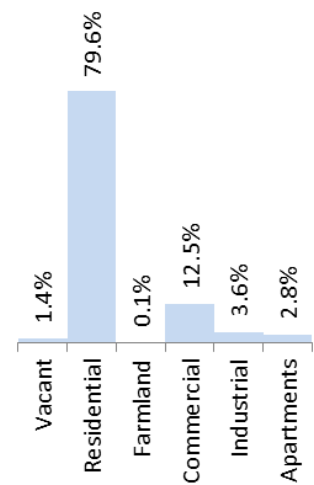


### Pinelands Management Areas



2012 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	451,336	303,777	3
Population Density (per mile <sup>2</sup> )	551	714	4
Population Change - 2000 to 2012	6.6%	6.0%	5
% Land Protected in Pinelands Area*	56.7%	45.9%	2
Assessed Acres of Farmland	120,712	57,693	1
Building Permits Issued	713	557	3
Housing Transactions	1,773	1,577	4
Average Home Sale Price	\$256,370	\$274,799	4
Equalized Property Value (millions)	\$46,477.1	\$39,542.2	3
Average Effective Tax Rate	2.30	2.23	5
Average Residential Property Tax Bill	\$6,146	\$5,239	1
Per Capita Income Estimate	\$34,714	\$29,391	1
Unemployment Rate	9.2%	11.5%	7

Assessment Class Proportions in 2012 Municipal Valuations



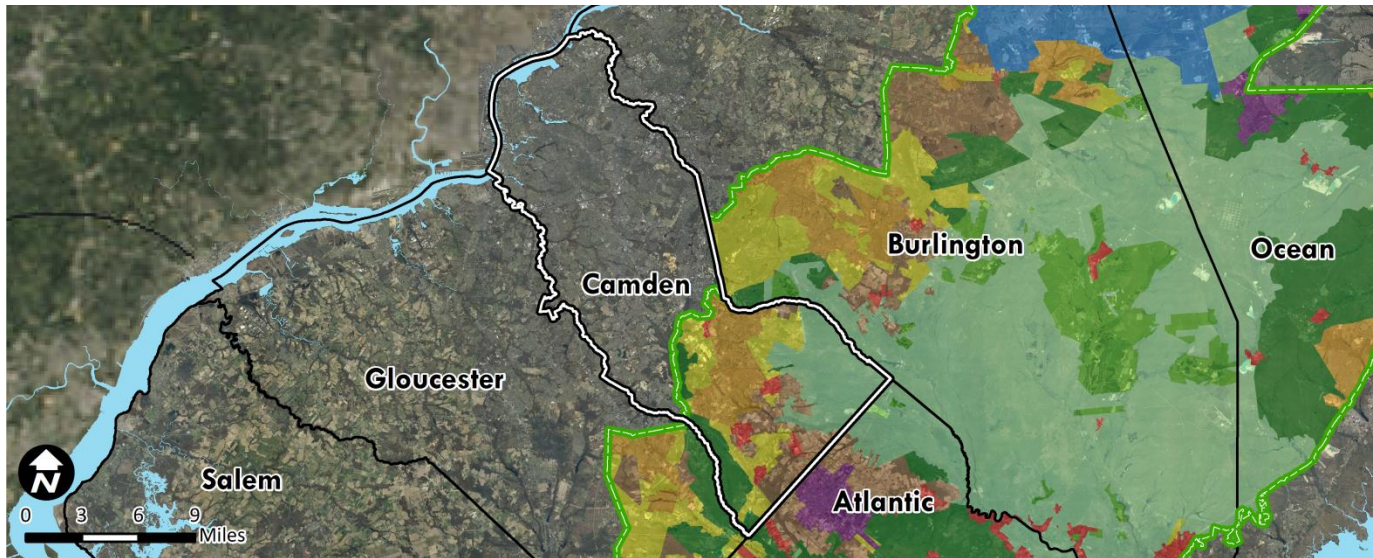
Private Sector Employment 164,530	Private Sector Establishments 10,393	Private Sector Avg. Annual Wages \$42,845
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\*This Figure captures the 7 Pinelands Area counties only, not Salem County.

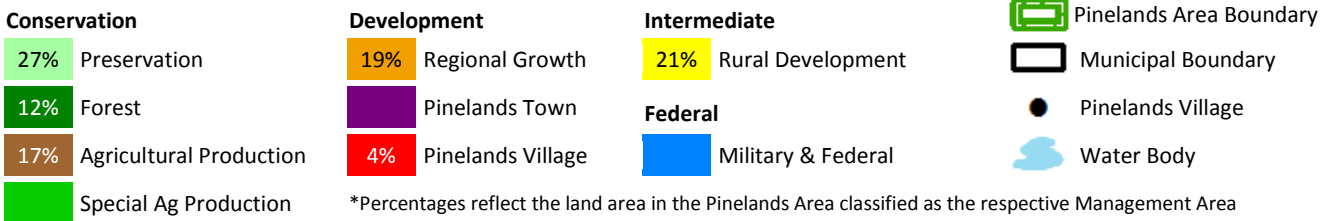
# Camden County



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

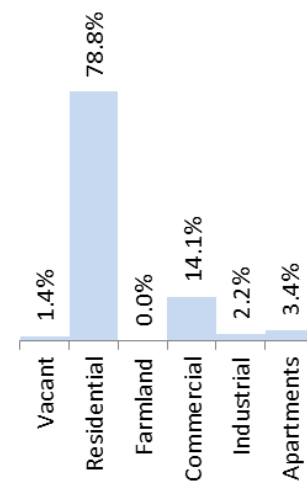


## Pinelands Management Areas



2012 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	513,539	303,777	2
Population Density (per mile <sup>2</sup> )	2,257	714	1
Population Change - 2000 to 2012	0.9%	6.0%	7
% Land Protected in Pinelands Area*	44.0%	45.9%	5
Assessed Acres of Farmland	10,899	57,693	7
Building Permits Issued	898	557	2
Housing Transactions	2,048	1,577	2
Average Home Sale Price	\$213,169	\$274,799	5
Equalized Property Value (millions)	\$38,064.5	\$39,542.2	5
Average Effective Tax Rate	3.12	2.23	1
Average Residential Property Tax Bill	\$5,900	\$5,239	3
Per Capita Income Estimate	\$28,469	\$29,391	5
Unemployment Rate	10.6%	11.5%	4

Assessment Class Proportions in 2012 Municipal Valuations



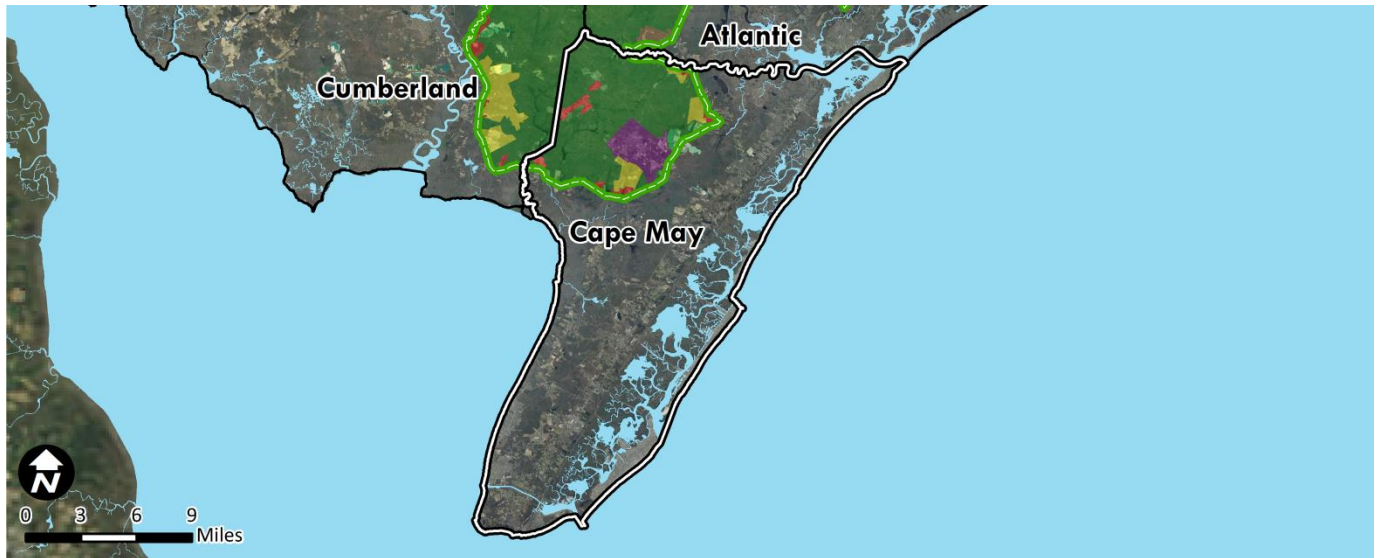
Private Sector Employment 157,733	Private Sector Establishments 11,482	Private Sector Avg. Annual Wages \$38,288
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\*This Figure captures the 7 Pinelands Area counties only, not Salem County.

# 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



Municipal Boundary



Pinelands Village

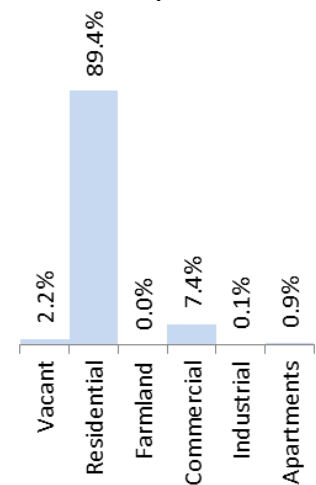


Water Body

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

2012 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	96,304	303,777	7
Population Density (per mile <sup>2</sup> )	337	714	6
Population Change - 2000 to 2012	-5.9%	6.0%	8
% Land Protected in Pinelands Area*	52.8%	45.9%	3
Assessed Acres of Farmland	9,697	57,693	8
Building Permits Issued	491	557	5
Housing Transactions	1,795	1,577	3
Average Home Sale Price	\$524,575	\$274,799	1
Equalized Property Value (millions)	\$47,967.1	\$39,542.2	2
Average Effective Tax Rate	1.06	2.23	8
Average Residential Property Tax Bill	\$4,377	\$5,239	7
Per Capita Income Estimate	\$31,360	\$29,391	3
Unemployment Rate	13.4%	11.5%	3

## Assessment Class Proportions in 2012 Municipal Valuations



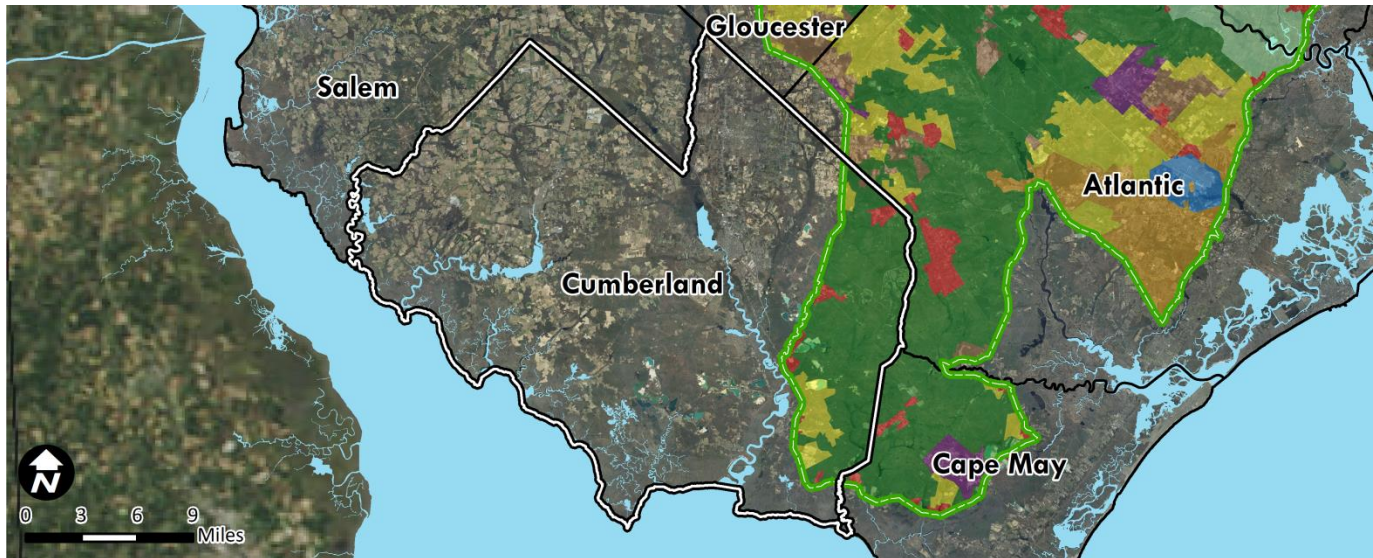
Private Sector Employment 30,924	Private Sector Establishments 3,757	Private Sector Avg. Annual Wages \$28,694
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\*This Figure captures the 7 Pinelands Area counties only, not Salem County.

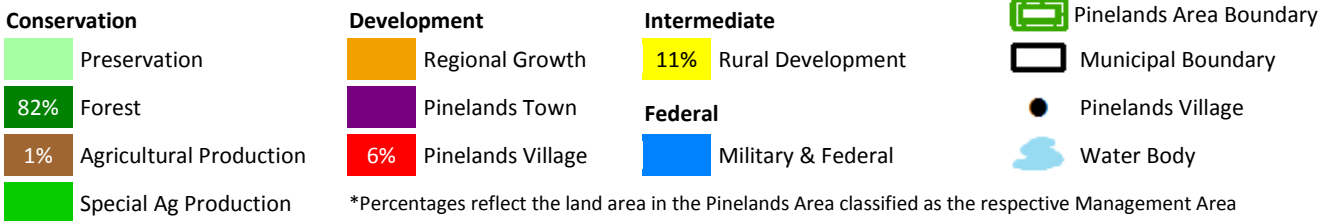
# Cumberland County



Pinelands Area 2010 population: 6,053 (4% of total population)  
 Pinelands Area acreage: 45,398 (14% of total acreage)

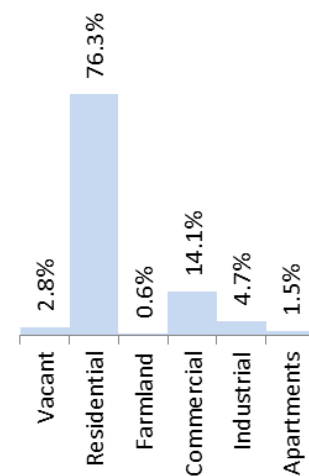


## Pinelands Management Areas



2012 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	157,785	303,777	6
Population Density (per mile <sup>2</sup> )	314	714	7
Population Change - 2000 to 2012	7.7%	6.0%	4
% Land Protected in Pinelands Area*	52.1%	45.9%	4
Assessed Acres of Farmland	84,420	57,693	3
Building Permits Issued	190	557	7
Housing Transactions	464	1,577	7
Average Home Sale Price	\$153,690	\$274,799	8
Equalized Property Value (millions)	\$9,110.6	\$39,542.2	7
Average Effective Tax Rate	2.45	2.23	4
Average Residential Property Tax Bill	\$3,809	\$5,239	8
Per Capita Income Estimate	\$22,531	\$29,391	8
Unemployment Rate	14.1%	11.5%	2

Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment 44,318	Private Sector Establishments 2,931	Private Sector Avg. Annual Wages \$33,616
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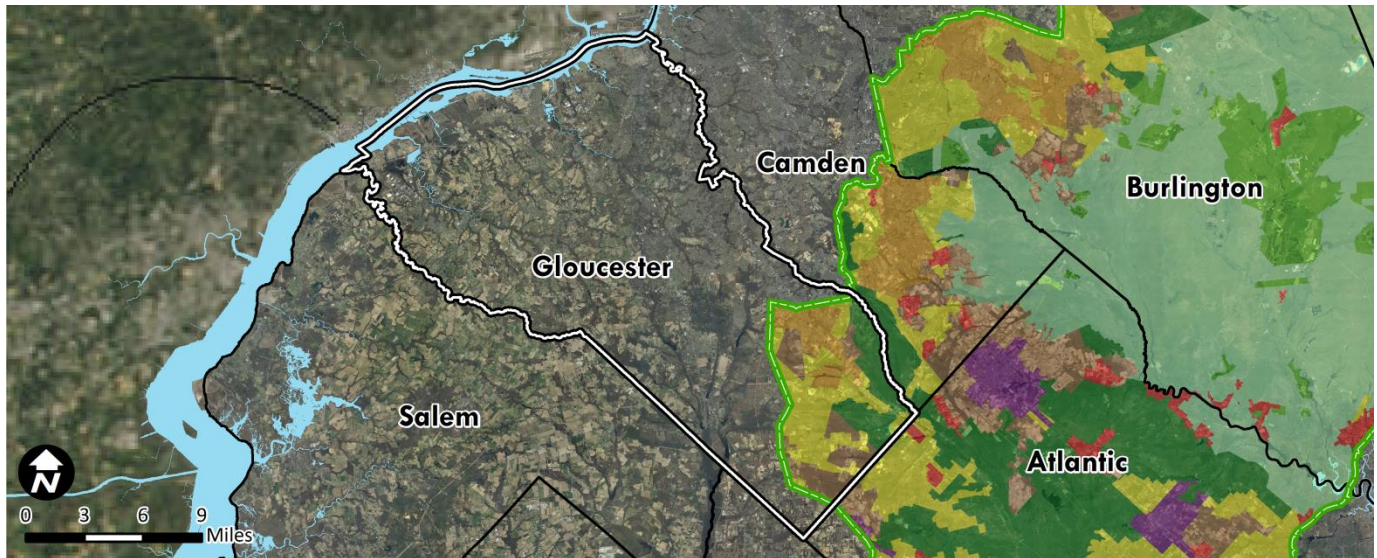
\*This Figure captures the 7 Pinelands Area counties only, not Salem County.

# Gloucester County

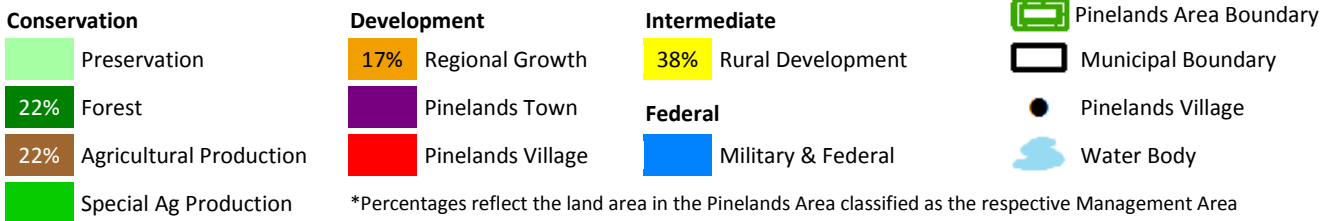


Pinelands Area 2010 population: 20,487 (7% of total population)

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

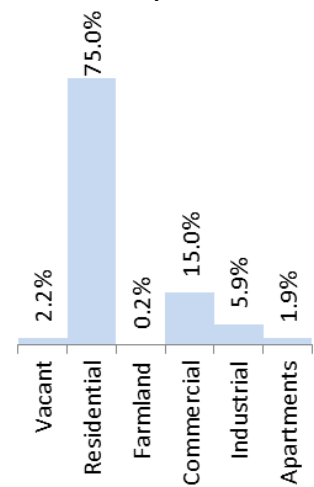


## Pinelands Management Areas



2012 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	289,586	303,777	4
Population Density (per mile <sup>2</sup> )	860	714	2
Population Change - 2000 to 2012	13.7%	6.0%	1
% Land Protected in Pinelands Area*	27.4%	45.9%	7
Assessed Acres of Farmland	57,079	57,693	4
Building Permits Issued	534	557	4
Housing Transactions	1,281	1,577	6
Average Home Sale Price	\$211,069	\$274,799	6
Equalized Property Value (millions)	\$26,566.2	\$39,542.2	6
Average Effective Tax Rate	2.84	2.23	2
Average Residential Property Tax Bill	\$5,967	\$5,239	2
Per Capita Income Estimate	\$32,404	\$29,391	2
Unemployment Rate	10.0%	11.5%	4

Assessment Class Proportions in 2012 Municipal Valuations



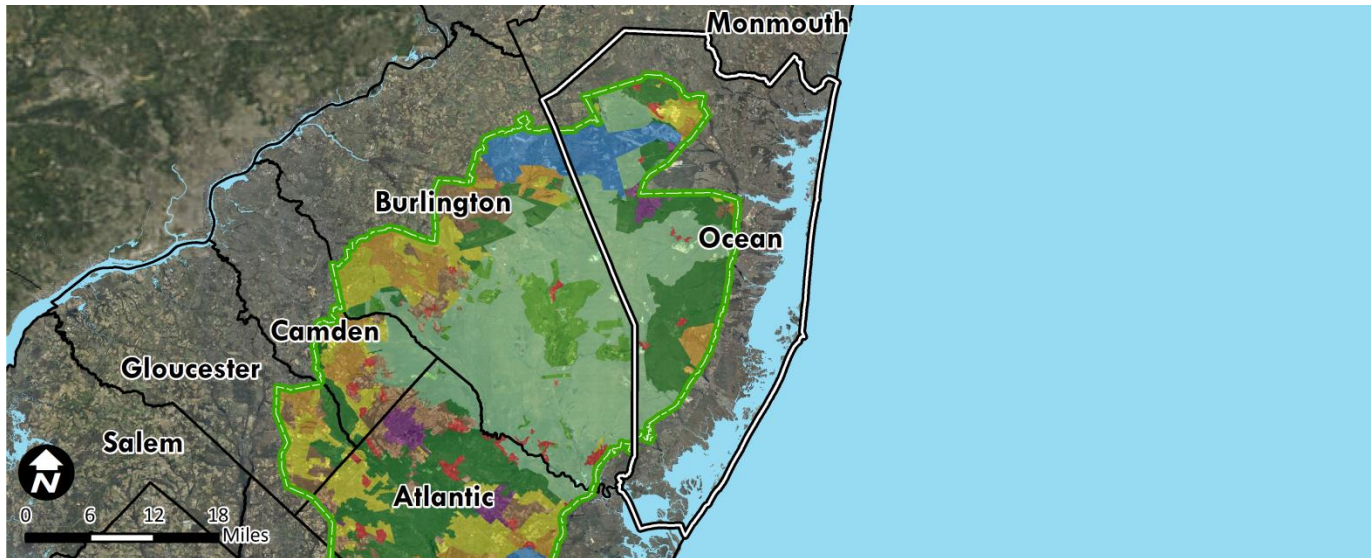
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
79,456	5,870	\$38,697

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

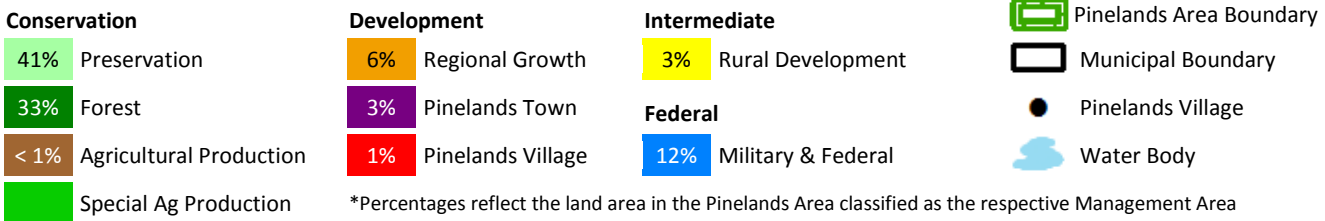
# Ocean County



Pinelands Area 2010 population: 48,562 (8% of total population)  
 Pinelands Area acreage: 187,559 (39% of total acreage)

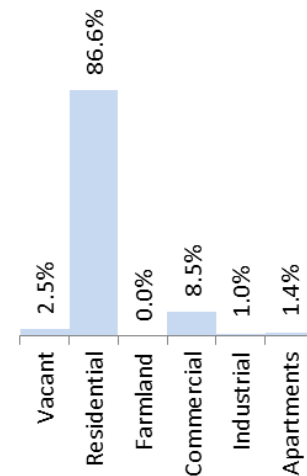


## Pinelands Management Areas



2012 Variables	County Value	South N.J. County Avg.	South N.J. County Rank
Population Estimate	580,470	303,777	1
Population Density (per mile <sup>2</sup> )	765	714	3
Population Change - 2000 to 2012	13.6%	6.0%	2
% Land Protected in Pinelands Area*	59.1%	45.9%	1
Assessed Acres of Farmland	23,398	57,693	6
Building Permits Issued	1,125	557	1
Housing Transactions	3,532	1,577	1
Average Home Sale Price	\$369,094	\$274,799	2
Equalized Property Value (millions)	\$96,876.2	\$39,542.2	1
Average Effective Tax Rate	1.49	2.23	7
Average Residential Property Tax Bill	\$5,466	\$5,239	4
Per Capita Income Estimate	\$30,573	\$29,391	4
Unemployment Rate	10.3%	11.5%	3

## Assessment Class Proportions in 2012 Municipal Valuations

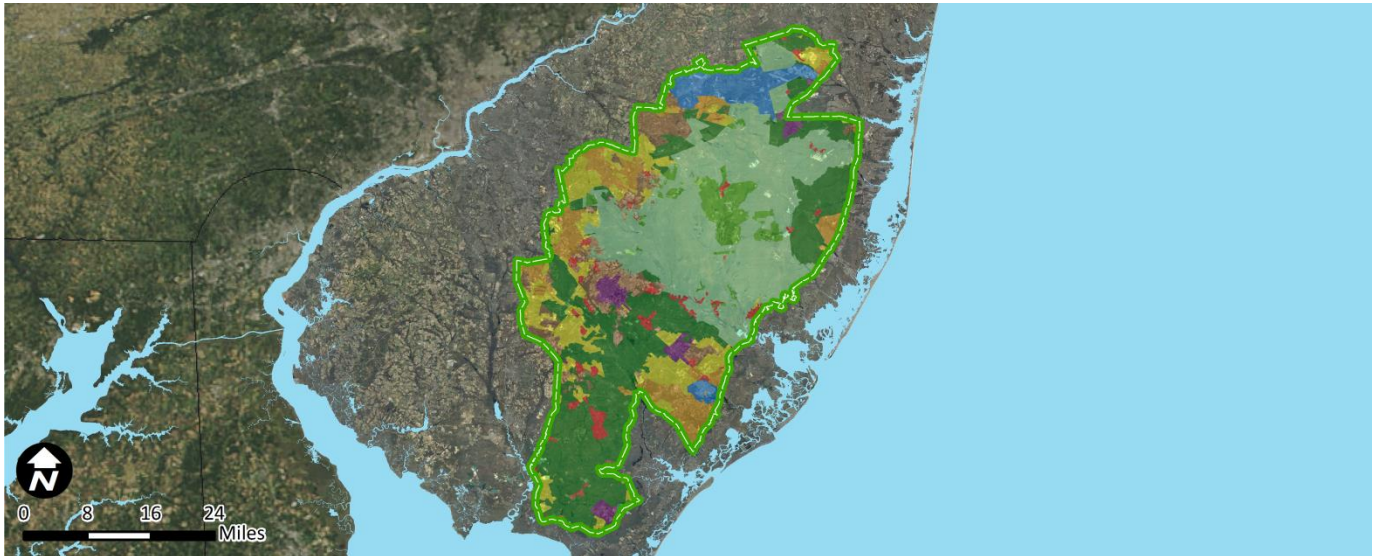


Private Sector Employment 122,515	Private Sector Establishments 11,767	Private Sector Avg. Annual Wages \$32,660
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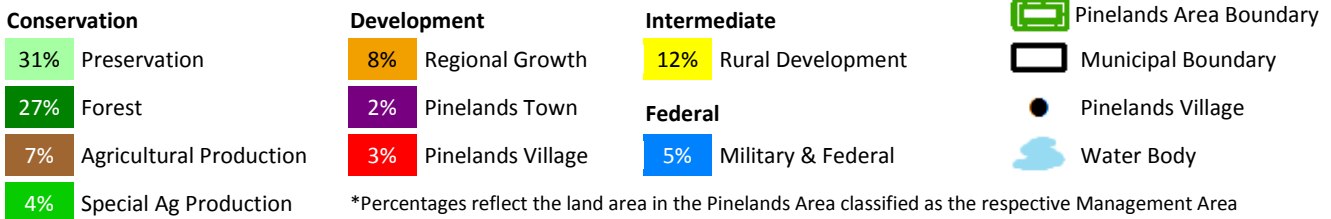
\*This Figure captures the 7 Pinelands Area counties only, not Salem County.

# Pinelands Area Municipalities

Pinelands Area 2010 population: 312,971  
 Pinelands Area acreage: 938,000

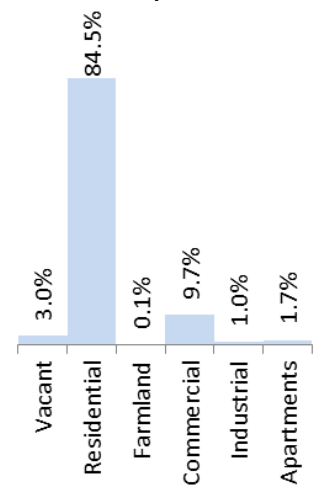


## Pinelands Management Areas



2012 Variables	Pinelands Municipal Value	Non-Pinelands Municipal Value	New Jersey Value
Population Estimate	702,562	1,727,654	8,864,590
Population Density (per mile <sup>2</sup> )	326	1,218	1,132
Population Change - 2000 to 2012	13.3%	4.6%	4.5%
% Land Protected in Pinelands Area	100.0%	N/A	N/A
Assessed Acres of Farmland	174,254	287,216	975,895
Building Permits Issued	1,179	3,274	17,939
Housing Transactions	3,105	9,512	41,414
Average Home Sale Price	\$225,101	\$295,377	\$377,218
Equalized Property Value (millions)	\$1,517	\$1,581	\$2,097
Average Effective Tax Rate	2.10	2.34	2.27
Average Residential Property Tax Bill	\$4,940	\$5,802	\$7,857
Per Capita Income Estimate	\$29,176	\$32,566	\$33,924
Unemployment Rate	10.7%	11.0%	9.5%

Assessment Class Proportions in 2012 Municipal Valuations



Private Sector Employment 197,660	Private Sector Establishments 17,374	Private Sector Avg. Annual Wages \$38,140
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