

New Jersey Pinelands Commission

Long Term Economic Monitoring Program



2017 Annual Report

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Nancy Wittenberg, Executive Director

**NEW JERSEY PINELANDS LONG-TERM ECONOMIC
MONITORING PROGRAM
*2016-2017 ANNUAL REPORT***

June 2018

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The report is available for review on the Pinelands Commission's website at <http://www.nj.gov/pinelands>.

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

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Executive Summary

The 2017 Long Term Economic Monitoring Report, adding data from 2015 and 2016, provides the results of the ongoing monitoring program that tracks economic conditions in the Pinelands region. This report presents economic data and describes key trends in the areas of population, real estate, economic growth, and municipal finance. Data is updated annually when available. The general analytical approach is to compare economic trends (from 1980 onward) of Pinelands municipalities to Non-Pinelands municipalities and the state as a whole. Efforts are made to obtain data that is representative of the Pinelands Area. When this scale of data is not available, municipal data is used instead. In this report, the “Pinelands municipalities” refers to an aggregate of 47 municipalities that have at least 10% of their land area within the state-designated Pinelands Area (only 11 of these are entirely within the Pinelands Area; the remaining municipalities straddle the Pinelands Area boundary). The “Non-Pinelands municipalities” refers to an aggregate of the remaining 155 municipalities located in the eight counties of southern New Jersey.

Population

Over the two-year period spanning 2015 and 2016, estimates indicate that Pinelands municipalities’ population dropped by about 1,500 people below the population in 2010. That drop represents a decrease of less than 1%. The Non-Pinelands municipalities saw a larger decrease of about 1,700 people. The population growth rate in the Pinelands municipalities slowed since the 2010 Census and the population began to decrease in 2015. The average median age in the Pinelands has remained steady at about 43 years old. In addition to reporting statistics on median age, this report is also showing statistics on two age groups: children less than 19 years of age and adults over 65 years of age.

Real Estate

Pinelands municipalities saw a very slight uptick in the average number of home building permits issued, contrasting with the Non-Pinelands municipalities, where there was a slight downtick. The Pinelands municipalities issued an average of 33 permits, up from 28 issued on average in 2014. The Non-Pinelands municipalities issued an average of 32 permits, down from 40 permits issued on average in 2014.

The number of residential sales continued to climb in the Pinelands and across other regions of the State. Home sales were up 32% over the number of sales in 2014 and 2015. Average price was uneven for the two-year period, gaining in 2015, but falling slightly again in 2016 in Pinelands towns. In Non-Pinelands towns, the average price fell in 2015, but rebounded in 2016 to remain steady for the two-year period. The average selling price for Pinelands municipalities decreased in 2016 to \$236,000, but the average price increased in the Non-Pinelands region to \$310,000.

Economic

The updated estimates for 2016 indicate that per capita income fell slightly by 0.4% (\$118) in Pinelands municipalities and it increased by 15% (\$5,270) in the Non-Pinelands region. Per capita income is estimated at \$31,049 in the Pinelands region and at \$39,560 in the Non-Pinelands region.

Unemployment has been steadily decreasing since 2012 across southern New Jersey. In the Pinelands municipalities, the unemployment rate decreased by 2.2 percentage points since 2014 and ended at 5.8% for 2016. During the same time (2014 to 2016), private sector employment figures showed an increase of about 8,800 jobs (up 6.1%). The number of private sector establishments increased by 105 establishments between 2014 and 2016 in the Pinelands municipalities (up 0.8%). Private sector average annual wages rose over the two-year period by about \$477 (1.25%). Growth in private sector wages was slowest in

Pinelands municipalities when compared to Non-Pinelands municipalities and the State in general, where wages grew by about 3%.

Farmland assessed acreage in the Pinelands has increased 11% since 2014, ending at 19,092 acres in 2016. Acreage assessed in the Non-Pinelands municipalities increased by 3.5% over the two-year period. Cranberry prices have risen since 2014 (up to 43¢ per pound or 15 %.) Prices for New Jersey blueberries fell from \$1.42 per pound in 2014 to \$1.35 per pound in 2016 (5%).

Municipal Finance

Municipal data showed that tax bills have increased by more than 5.5% in the Pinelands municipalities and by 4.7% in the Non-Pinelands municipalities since 2014. State equalized property valuations in Pinelands municipalities held steady, increasing by less than 0.1%. Equalized valuations in Non-Pinelands municipalities declined by just over 1% between 2014 and 2016. Statewide property valuation grew by over 2% in that timeframe.

Since 2014, per capita municipal budgets increased by 2.3% in the Pinelands municipalities to \$901. State aid decreased by just over 1% in that period. Budgets in the Non-Pinelands municipalities increased 2% over the budgets in 2014, to \$1,468 per capita. State aid to Non-Pinelands municipalities has decreased by 3% since 2014.

Special Studies

No special studies were conducted for this update of the Long Term Economic Monitoring report. Staff is conducting a re-evaluation of the report indicators and format. This re-evaluation may inform the selection of a future special study.

Conclusion

Most indicators show positive trends for Pinelands municipalities, except that residential sales prices have declined and wages were relatively stagnant. The most significant divergence in indicators between Pinelands and Non-Pinelands municipal statistics was a decline in per capita income inside the Pinelands, but a substantial increase in the Non-Pinelands municipalities. Most other indicators followed similar trends both inside and outside the Pinelands boundary in southern New Jersey. The Pinelands region and southern New Jersey lag behind the State in economic growth for the monitored indicators.

1. Introduction

1.1 The Long-Term Economic Monitoring Program

The Pinelands National Reserve was established in 1978 and is the nation's first Federal Reserve. It covers an area of more than one million acres in the heart of southern New Jersey. The Pinelands Comprehensive Management Plan (CMP) was adopted in 1981 and manages land-use activities at regional and local levels. A blend of federal, state, and local programs is responsible for safeguarding the region's environmental and cultural resources. Of particular importance to the regional economy are land-use policies and controls included in the CMP and implemented by municipalities. Some of these policies and controls significantly limit development in designated Preservation, Forest, and Agricultural management areas and encourage development in other management areas, particularly Regional Growth and Town Areas. These growth areas tend to be located in and around already-developed areas, many of which have access to central sewer systems and other infrastructure. Studies have suggested that the CMP has been successful in steering growth away from conservation areas and toward growth areas.^{1,2}

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

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

The *New Jersey Pinelands Commission Long-Term Economic Monitoring Program First Annual Report* was released in 1997, following three years of planning. The document, the first in a series of annual reports, presented data and described trends for key indicators in the areas of property values, economic growth, and municipal finance. The *First Annual Report* and its accompanying Executive Summary also identified potential topics for future study. Subsequent annual reports updated most of the data in the *First Annual Report*. This *Annual Report*, which covers data from 2015 and 2016, is the nineteenth in the series and augments most of the data used to develop the previous reports. A copy of this *Annual Report* can be obtained on CD-ROM by writing to the Pinelands Commission at P.O. Box 359, New Lisbon, New Jersey 08064. The report is also available on the Pinelands Commission web site at <http://www.nj.gov/pinelands>.

1.2 Program Goal and Objectives

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

¹ See "Managing Land Use and Land-Cover Change: The New Jersey Pinelands Biosphere Reserve" by Walker and Solecki, *Annals of the Association of American Geographers*, 89(2), 1999, p. 220-237.

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

The program was designed to accomplish several principal objectives:

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

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

1.3 Program Administration

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

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

2. Annual Reports

2.1 Data Categories

Ongoing data collection and analysis involves continual monitoring of key economic indicators to establish a historical basis for comparing trends and to enable the analysis of activity in the Pinelands in relation to regional and statewide patterns. The ongoing reporting of data will allow the Commission to target topics for in-depth research to determine the basis of economic well-being of Pinelands communities and potential cause-and-effect relationships. Data for key variables are collected annually, when possible, and provide information essential to understanding the character of the Pinelands economy. In general, this data is collected from secondary sources. The annually updated data are 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 2015 and 2016, does not include any supplemental variables. Supplemental variables can provide valuable information and insight into the Pinelands and the regional economy. They are not considered core variables because they cannot be updated regularly. For instance, the United States Census data is extremely valuable, but because it is only updated every 10 years, most of it cannot be considered core. If reliable data can be obtained for a sufficient period of time, supplemental variables can become core in the future.

2.2 Core Variables

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

Population

This section examines basic information regarding the population of southern New Jersey and the Pinelands that is necessary for any economic or geographic analysis. The core variables in this section are: population at the municipal and census block level, population change, age demographics, and annual population estimates. New to this *Annual Report*, the demographic data is further segmented to report statistics on age groups under 19 years of age and over 65 years of age. 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 ratables associated with vacant land. This group of variables identifies trends in development pressures and measures the differences in values of housing and land in different areas of the region. The value of property depends in part on the permitted use that yields the highest rate of return to the owner, often called "the highest and best use." Permitted uses on vacant land and farmland in many parts of the Pinelands have been limited significantly and therefore land prices may be adversely affected.

In addition, land-use regulation may also affect the value, type and supply of housing and other development activities. For example, the implementation of the Comprehensive Management Plan

(CMP) has the potential to increase housing prices, both through a reduction in supply in certain areas and by providing a permanent amenity to residents of the region. Conversely, other factors, such as declining or shifting job markets, if they exist, may cause housing prices to decrease. Three variables are tracked annually for this variable group: building permits, the average selling price of homes, and the volume of residential real estate transactions.

Economy

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

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

Municipal Finance

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

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

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

Table 2.2

Summary of Core Variables in Annual Report

Name	Years Collected	Years Added	Frequency of Collection	Data Scale ³					
				St.	Co.	Mu.	BG	Bl.	Pt.
Municipal Population	1980, 1990, 2000, 2010		Decennial			X			
Census Block Population	1990, 2000, 2010		Decennial						X
Age Demographics	1980, 1990, 2000, 2012	2015, 2016	Decennial/Annual			X	X		
Population Estimates	2001-2014	2015, 2016	Annual			X			
Building Permits	1980-2014	2015, 2016	Annual			X			
Average Selling Prices of Homes	1994-2014	2015, 2016	Annual			X			X
Volume of Real Estate Transactions	1994-2014	2015, 2016	Annual			X			X
Retail Sales & Establishments	1992, 1997, 2002, 2007	2012	Quintennial		X	X ⁴			
Per Capita Income	1979, 1989, 1999, 2010, 2012, 2014	2015, 2016	Decennial/Annual			X	X		
Unemployment	1990-2014	2015, 2016	Annual			X			
Employment	2004-2014	2015, 2016	Annual			X			
Number of Establishments	2004-2014	2015, 2016	Annual			X			
Wages	2004-2014	2015, 2016	Annual			X			
Farmland Assessed Acreage	2009-2014	2015, 2016	Annual			X			
Agricultural Census Data	1992, 1997, 2002, 2007, 2012		Quintennial		X				
Berry Production	1980-2014	2015, 2016	Annual	X					
Average Residential Property Tax Bill ⁵	1998-2014	2015, 2016	Annual			X			X
Equalized Property Value	1998-2014	2015, 2016	Annual			X			
Effective Tax Rate	2000-2014	2015, 2016	Annual			X			
Assessment Class Proportions	1999-2014	2015, 2016	Annual			X			
Local Municipal Purpose Revenues	1999-2014	2015, 2016	Annual			X			

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

⁴Data for retail sales and establishments are available by county and by economic place. The economic places largely mirror the boundaries of municipalities, however not all municipalities are classified as an economic place. Therefore, data is only available for 35 Pinelands municipalities.

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

2.3 Supplemental Variables

Supplemental variables can provide valuable information and insight into the Pinelands and regional economy, but are not tracked annually as core variables because they are not updated regularly. If the data are viable and a sufficient time series can be obtained, supplements could become core variables. No supplemental variables have been added to the 2017 LTEM report.

2.4 Geographic Scale: Defining the Pinelands

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

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

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

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 completed for the 2015 report 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,

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

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

2.5 Presentation of Data

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

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

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

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 2016 dollars, unless otherwise noted. Variables in the Fact Book are not adjusted for inflation, as the purpose is to display the most recent information available and not to monitor change over time.

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

The Municipal Fact Book was a new addition to the *2002 Annual Report*, and was significantly updated and enhanced for the *2003, 2004, and 2013* reports. Economic data are arranged by municipality rather

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

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

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. No special study was initiated during this reporting cycle.

Continuing Study: Indicators of Municipal Health

At its September 1999 meeting, the Pinelands Municipal Council unanimously recommended that the Long-Term Economic Monitoring Program conduct a special project to identify and characterize municipalities experiencing poor health. In November 1999, the Pinelands Commission authorized the project as the second special study.

In January 2001, a short questionnaire was administered to municipal officials (i.e., mayors, CFO's, administrators, council members, etc.) in 36 municipalities.⁹ In general, the results of the questionnaire suggested that the most pressing municipal health concerns of the Pinelands municipalities related to a healthy tax base (i.e., a mix of commercial, industrial, and residential land), tax rates, and school costs.

The design of the study consisted of two parts. The first part focused 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 identified those towns in the Pinelands that are most in need of fiscal assistance, and planned to design a corresponding funding model.

After academic peer review, a final draft for this study was presented to the Public and Governmental Programs Committee of the Pinelands Commission in July 2008. The report was then distributed to state agencies for comment; however no comments have been received. A copy of this document is available for public review on the Pinelands Commission's web site.

The draft model to measure fiscal stress used a 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 showed that the most severely stressed municipalities in the Pinelands region rank among the top 10% of municipalities statewide in regards to fiscal stress.

This first phase study:

- has been used, as a guide to provide different Comprehensive Management Plan standards for distressed municipalities in rulemaking
- could be used as a guideline for more efficiently channeling state aid to those municipalities that may have been shortchanged in the past.

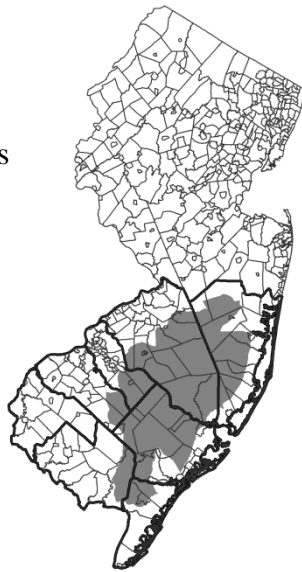
Recently, several independent studies looking at similar factors have been published. This suggests a timely to revisit this topic in a future phase to update, expand upon, or retool the methods involved.

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

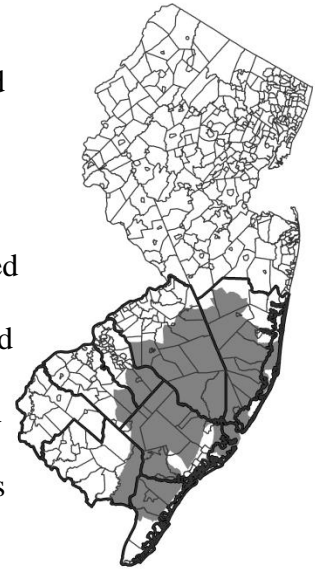
4. LTEM Annual Report of Indicators

Geographic Definitions

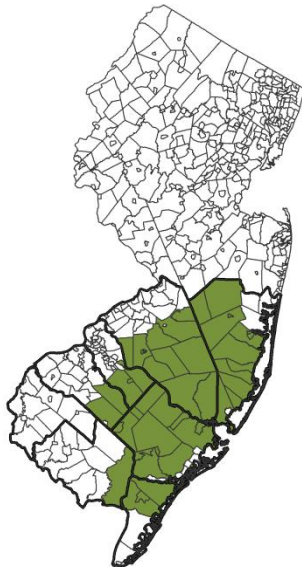
State-Designated Pinelands Area: the area designated by The Pinelands Protection Act. This is the state-designated area under the jurisdiction of the Pinelands Commission.



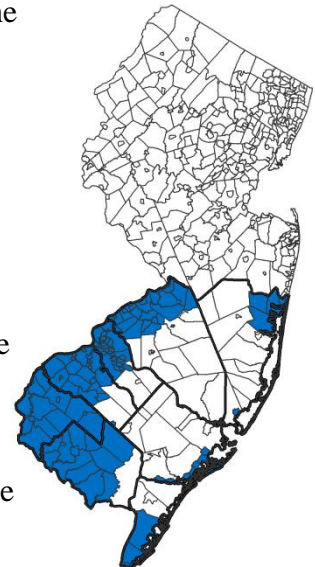
Pinelands National Reserve: the area designated by The National Parks and Recreation Act of 1978. This is the federally designated area that includes the state-designated area plus areas under CAFRA and DEP jurisdiction. This report focuses on the state-designated area only.



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



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



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

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

P1

Municipal Population

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

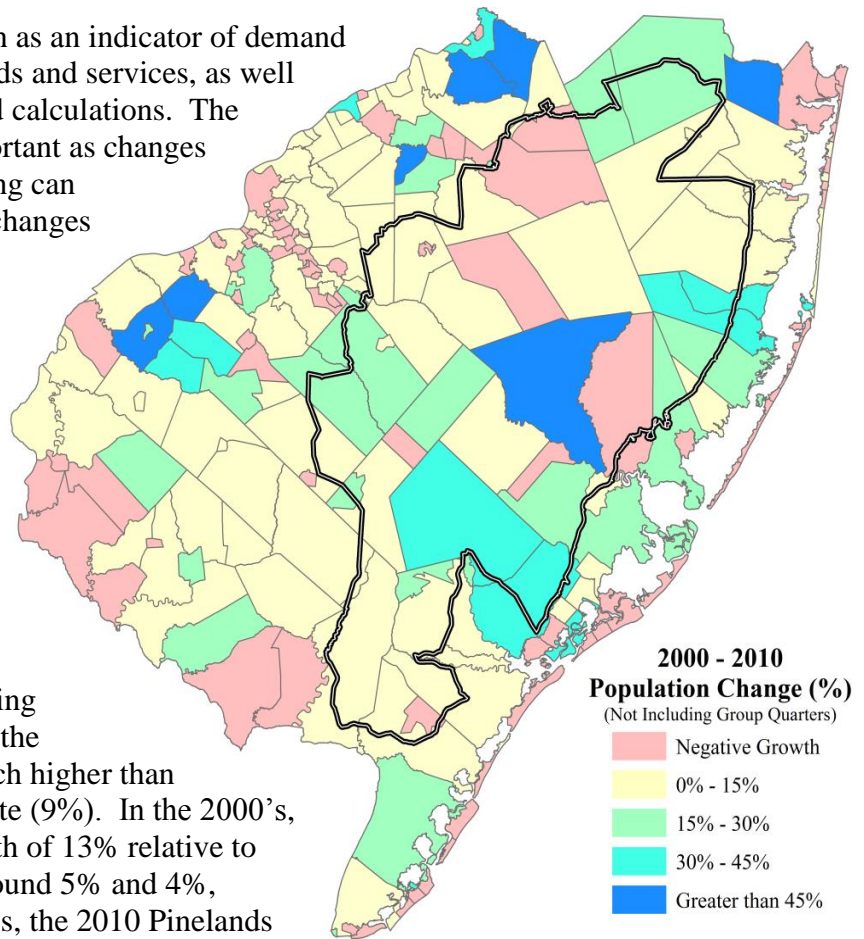
Last Updated for 2012 LTEM with 2010 data

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

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

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

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



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

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

Population Change from 1980 to 2010

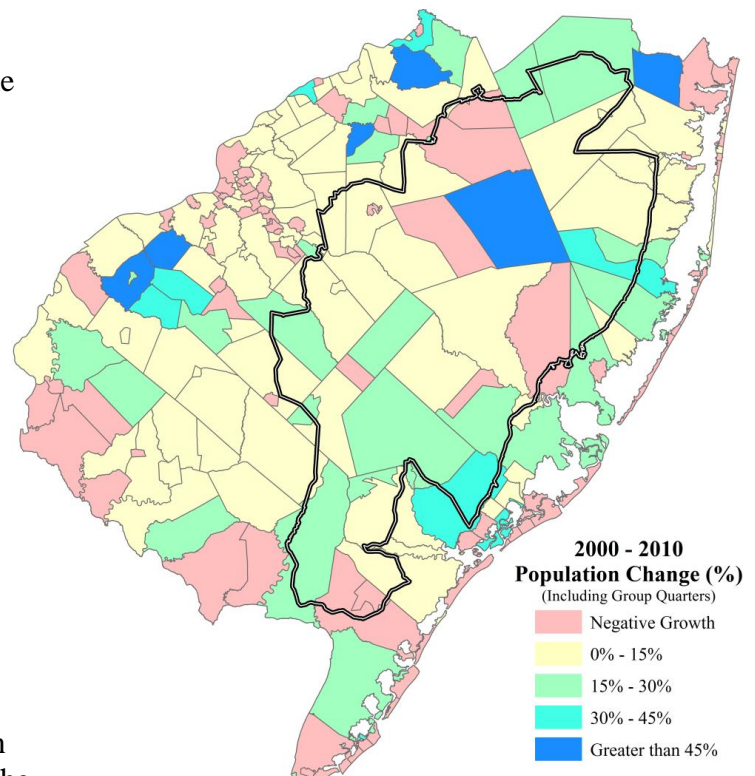
Region	1980	1990	2000	2010	Change 1980-1990	Change 1990-2000	Change 2000-2010	Change 1980-2010
Pinelands	423,465	549,521	615,984	698,092	30%	12%	13%	65%
Non-Pinelands	1,430,609	1,534,417	1,647,532	1,723,949	7%	7%	5%	21%
State	7,365,011	7,747,750	8,414,350	8,791,894	5%	9%	4%	19%

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

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

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

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



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

Table P1a

2010 Census Population by Pinelands Municipality

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

Table P1b

2010 Census Group Quarters Population

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

Table P1c 2000 to 2010 Group Quarters Components of Population Change

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

P2

Census Block Population

U.S. Census Bureau 1990, 2000, 2010

Last Updated for 2012 LTEM with 2010 data

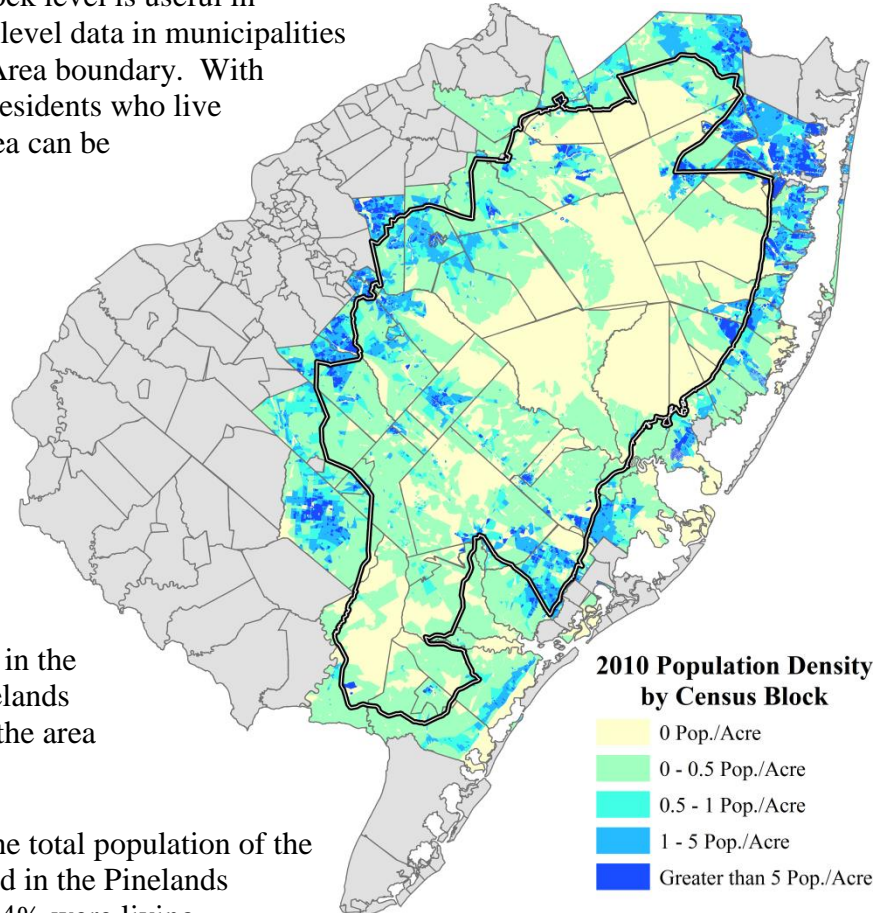
Most of the population growth occurring in Pinelands municipalities was taking place outside of the Pinelands Area boundary. From 1990 to 2010, the areas outside the Pinelands Area grew by 27%, while the areas inside only grew by 19%.

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

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

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

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



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

Pinelands Municipal Census Block Population

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

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

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

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

Pinelands Municipal Population Change Summary

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

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

Table P2a

2010 Census Population Inside and Outside the Pinelands Area

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

Table P2b

2000 to 2010 Population Change Inside the Pinelands Area

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

Table P2c

2000 to 2010 Population Change Outside the Pinelands Area

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

P3

Age Demographics

U.S. Census Bureau 1980, 1990, 2000, 2010, 2016/ESRI Data 2014

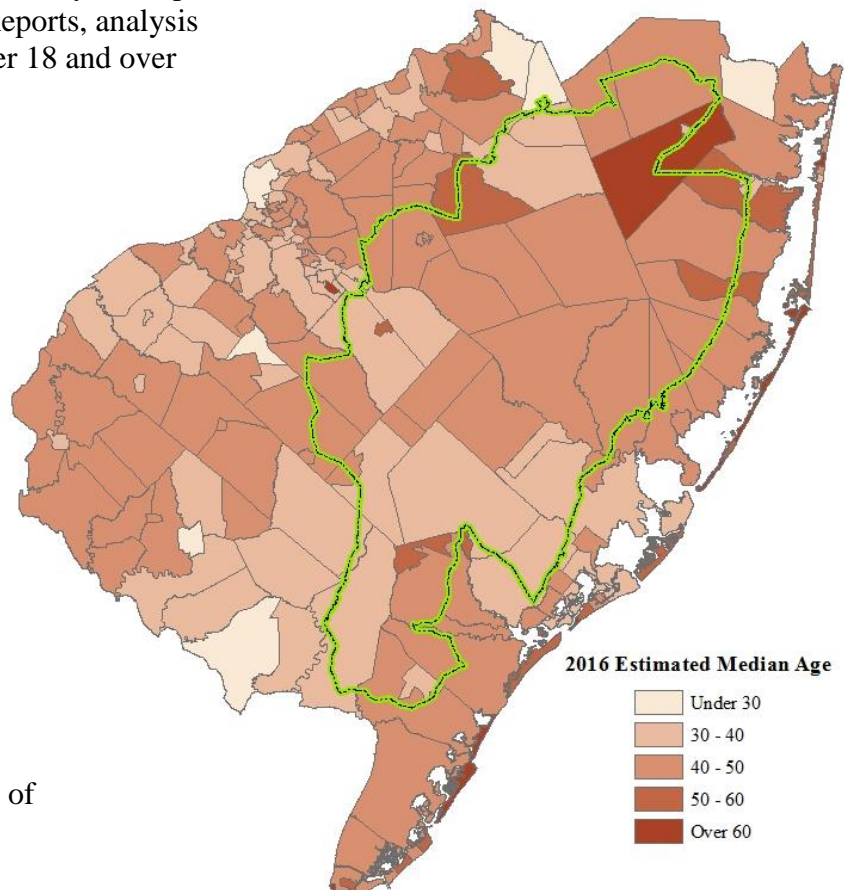
Last updated for 2017 LTEM with 2016 data

In 2016, the estimated average median age in the Pinelands Area was 43 years old. Outside the boundary, the estimated average median age in the Non-Pinelands was 44 years old.

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

Unit of Analysis: Demographic data is compiled at the municipal level and regionally aggregated for inside/outside the Pinelands and state analysis. In prior Long-Term Economic Monitoring Reports, analysis was mainly done by percentage under 18 and over 65 years of age.

Findings: Like the population of the entire state, the population in the Pinelands is aging. In 1980, the Pinelands average median age was 32. Ten years later, the average median age increased to 35 and by 2000, it had climbed to 39. Based on data from the U.S. Census, the average median age was 42 in 2010. Likewise, the Non-Pinelands increased from an average 1980 median age of 34 to 42 in 2010. The 2010 average median age of the state is 42 years old, while the northern half of the state's average median age is 41. Estimates for 2014 put the average median age of the Pinelands and Non-Pinelands municipalities at 43 years old.



The youngest towns in the Pinelands continue to be those surrounding Joint Base McGuire-Dix-Lakehurst: Wrightstown Borough with a median age of 31 and Lakehurst Borough at 34.

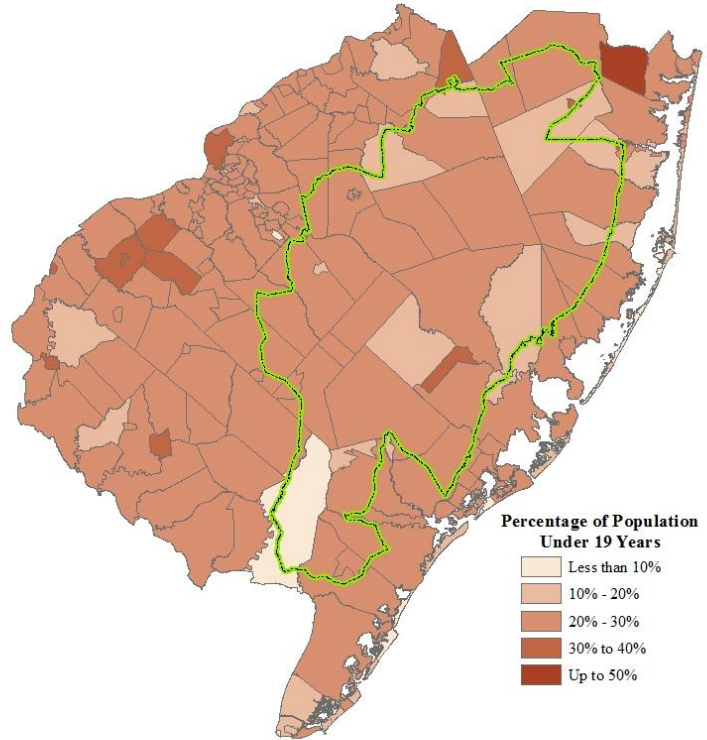
Manchester Township is the only town to have median ages above 60 (64 years). The median age in Berkeley Township is the next highest at 60 years, followed by Ocean Township and Southampton Township with median ages of 56.

Table P3

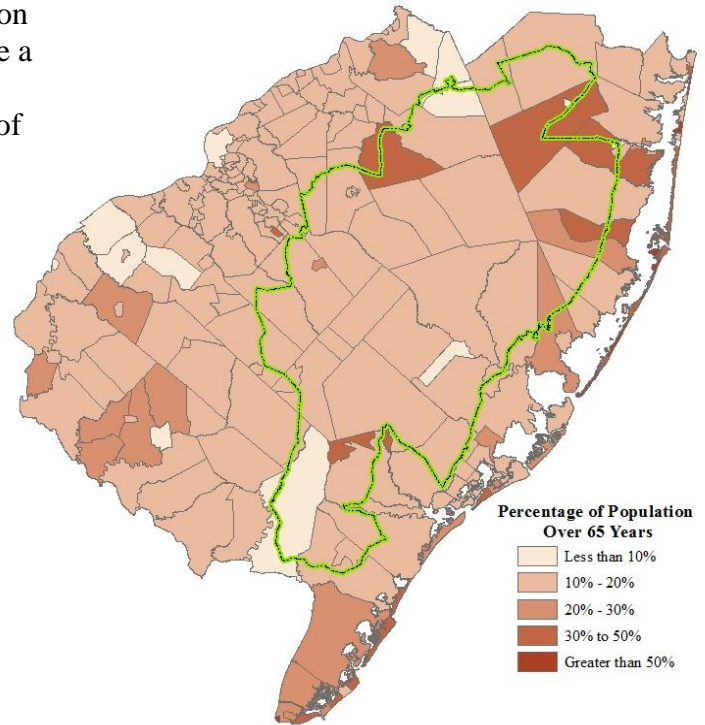
Pinelands Municipal Median Age – 1980 to 2016

Municipality	County	1980	1990	2000	2010	2016 Estimate
Manchester Township	Ocean	66	68	68	65	64
Berkeley Township	Ocean	59	65	66	61	60
Ocean Township	Ocean	45	35	38	50	56
Southampton Township	Burlington	44	46	50	54	56
Weymouth Township	Atlantic	29	33	39	50	52
Chesilhurst Borough	Camden	28	36	42	46	51
Port Republic City	Atlantic	33	36	41	46	50
Dennis Township	Cape May	30	33	37	45	47
Little Egg Harbor Township	Ocean	37	35	40	45	46
Estell Manor City	Atlantic	30	32	37	43	46
Barnegat Township	Ocean	29	33	39	46	46
Medford Lakes Borough	Burlington	32	37	40	42	45
Tabernacle Township	Burlington	29	33	38	43	45
Bass River Township	Burlington	32	33	38	43	45
Medford Township	Burlington	31	37	40	44	45
Woodland Township	Burlington	33	36	38	43	45
Stafford Township	Ocean	32	38	40	44	44
Mullica Township	Atlantic	29	33	37	42	44
Lacey Township	Ocean	35	37	39	41	44
Jackson Township	Ocean	29	32	35	42	43
Plumsted Township	Ocean	29	33	36	41	43
Eagleswood Township	Ocean	33	35	39	43	43
Washington Township	Burlington	35	37	41	44	43
Shamong Township	Burlington	29	34	37	42	43
Folsom Borough	Atlantic	27	32	38	42	42
Evesham Township	Burlington	29	32	36	41	42
Hammonton Town	Atlantic	33	37	39	40	42
Upper Township	Cape May	32	34	38	44	42
Buena Borough	Atlantic	32	34	36	37	42
Franklin Township	Gloucester	28	31	36	40	42
Monroe Township	Gloucester	29	33	37	39	41
Berlin Township	Camden	28	32	36	39	41
Hamilton Township	Atlantic	30	31	35	37	40
Egg Harbor Township	Atlantic	31	33	36	39	40
Woodbine Borough	Cape May	30	33	36	43	40
Buena Vista Township	Atlantic	29	35	39	42	39
Waterford Township	Camden	29	31	36	40	39
Maurice River Township	Cumberland	31	33	36	38	39
Winslow Township	Camden	29	31	34	37	38
Pemberton Township	Burlington	26	30	34	37	37
Galloway Township	Atlantic	28	30	34	39	37
New Hanover Township	Burlington	21	24	32	41	36
Beachwood Borough	Ocean	29	31	35	37	36
Wrightstown Borough	Burlington	22	24	31	30	35
Egg Harbor City	Atlantic	29	32	35	36	34
Lakehurst Borough	Ocean	26	28	32	32	33
South Toms River Borough	Ocean	24	28	32	34	31
<i>"Outside" Municipalities (less than 10% of total area inside Pinelands boundary)</i>						
Springfield Township	Burlington	31	36	39	44	42
Toms River Township	Ocean	33	36	40	43	44
Berlin Borough	Camden	31	35	38	41	41
Corbin City	Atlantic	50	37	37	39	43
Vineland City	Cumberland	31	34	37	38	38
North Hanover Township	Burlington	25	27	29	29	27

A closer look at the age demographic finds a few notable points. The number of municipalities with a large percentage of children (under the age of 19) is small. Of the Pinelands municipalities, South Toms River Borough has the highest percentage of the population under the age of 19 at 35%, but Lakehurst Borough and Little Egg Harbor Township each have at least 30% of their population that is under the age of 19. Maurice River Township has the lowest percentage of the population under 19 years of age, at only 7% of the total population. Manchester Township, New Hanover Township and Berkeley Township are the next lowest in the under 19 age group (11%, 13%, and 13%, respectively).



Among Pinelands municipalities with the largest percentage of the population over 65 years of age, Manchester Township ranks highest at 48%. Rounding out the three municipalities with the highest percentages of the over-65 age group, Berkeley Township comes in at 42% and Southampton Township at 34%. Age-restricted developments have a substantial effect on the median age in those towns. Pinelands municipalities with the lowest percentage of the population in the over-65 age demographic include New Hanover Township (4%), Maurice River Township (6%) and both Wrightstown Borough and Lakehurst Borough (8%). Notably, Maurice River Township ranks among the towns with both the lowest percentage of children and the lowest percentage of older adults.



The figures on the map at right show percentages of each demographic group across southern New Jersey. Table P3b, below provides more detail on these demographics for all Pinelands municipalities.

Table P3b

Populations under 19 and over 65 Years of Age

Municipality	County	Population Under 19 Years	% of Population Under 19 Years	Population Over 65 Years	% of Population Over 65 Years
South Toms River Borough	Ocean	1304	35%	298	8%
Lakehurst Borough	Ocean	876	33%	211	8%
Egg Harbor City	Atlantic	1276	30%	420	10%
Egg Harbor Township	Atlantic	12331	28%	5332	12%
Shamong Township	Burlington	1798	28%	794	12%
Beachwood Borough	Ocean	3008	27%	1201	11%
Wrightstown Borough	Burlington	205	27%	58	8%
Woodbine Borough	Cape May	721	27%	330	12%
Tabernacle Township	Burlington	1859	27%	1082	16%
Winslow Township	Camden	10528	27%	4674	12%
Buena Vista Township	Atlantic	2008	27%	1191	16%
Monroe Township	Gloucester	9657	26%	5607	15%
Plumsted Township	Ocean	2223	26%	1117	13%
Medford Township	Burlington	5988	26%	4131	18%
Medford Lakes Borough	Burlington	1045	26%	666	16%
Folsom Borough	Atlantic	475	26%	297	16%
Pemberton Township	Burlington	7097	26%	3672	13%
Eagleswood Township	Ocean	365	25%	233	16%
Galloway Township	Atlantic	9148	25%	5653	15%
Hammonton Town	Atlantic	3596	25%	2645	18%
Buena Borough	Atlantic	1109	25%	778	17%
Jackson Township	Ocean	13750	24%	10109	18%
Berlin Township	Camden	1299	24%	943	17%
Franklin Township	Gloucester	3972	24%	2095	13%
Waterford Township	Camden	2553	24%	1414	13%
Hamilton Township	Atlantic	6361	24%	3296	12%
Woodland Township	Burlington	342	24%	225	16%
Barneget Township	Ocean	5180	24%	5586	26%
Upper Township	Cape May	2810	23%	1969	16%
Dennis Township	Cape May	1469	23%	1167	18%
Stafford Township	Ocean	6218	23%	5258	20%
Evesham Township	Burlington	10327	23%	7193	16%
Lacey Township	Ocean	6352	22%	5224	18%
Estell Manor City	Atlantic	380	22%	178	11%
Little Egg Harbor Township	Ocean	4500	22%	5175	25%
Washington Township	Burlington	168	21%	127	16%
Mullica Township	Atlantic	1142	19%	997	16%
Port Republic City	Atlantic	181	18%	201	20%
Weymouth Township	Atlantic	494	18%	834	30%
Bass River Township	Burlington	258	18%	213	15%
Chesilhurst Borough	Camden	277	17%	391	24%
Southampton Township	Burlington	1640	16%	3506	34%
Ocean Township	Ocean	1318	15%	2897	33%
Berkeley Township	Ocean	5604	13%	17270	42%
New Hanover Township	Burlington	1062	13%	341	4%
Manchester Township	Ocean	4837	11%	20820	48%
Maurice River Township	Cumberland	587	7%	494	6%
<i>"Outside" Municipalities (less than 10% of total area inside Pinelands boundary)</i>					
North Hanover Township	Burlington	2622	34%	512	7%
Springfield Township	Burlington	924	27%	459	14%
Vineland City	Cumberland	16343	27%	9457	16%
Berlin Borough	Camden	1832	24%	1325	17%
Toms River Township	Ocean	21188	23%	17518	19%
Corbin City	Atlantic	108	22%	72	15%

P4

Population Estimates

U.S. Census Bureau/N.J. Department of Labor 2008 - 2016

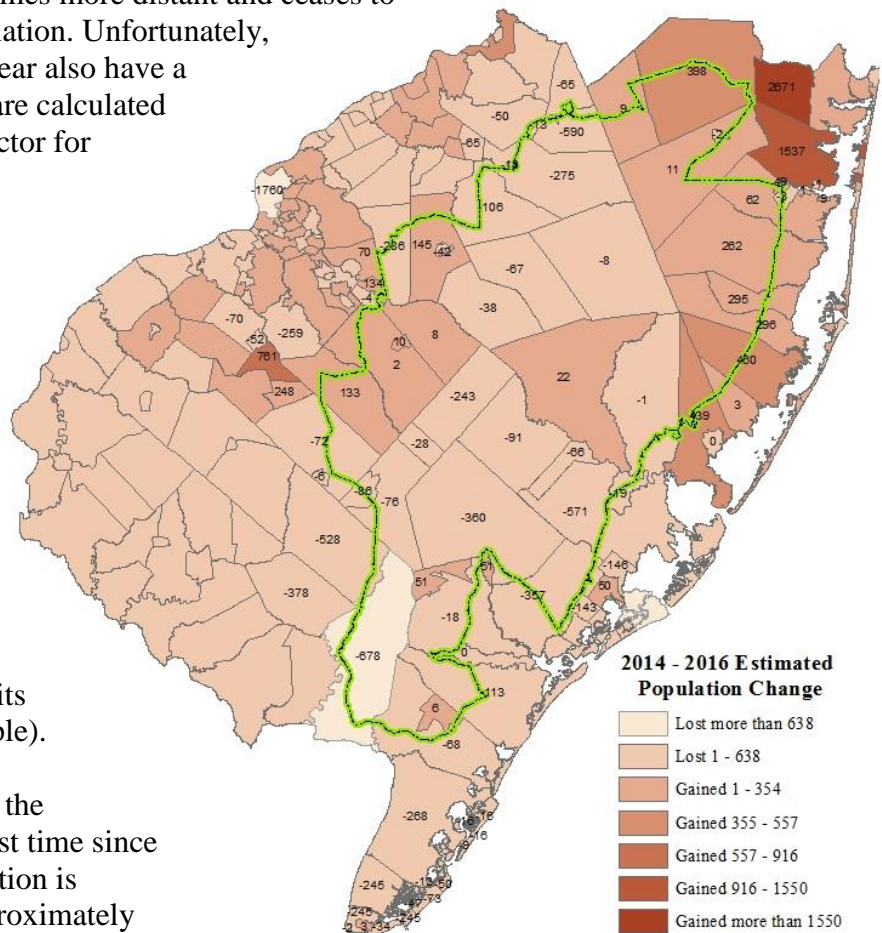
Updated for 2017 LTEM with 2016 data

Between 2014 and 2016, the Pinelands lost an estimated 1,482 people (0.7% decrease). The Non-Pinelands region saw a greater loss of estimated population, about 1,701 people (approximately a 0.1% decrease). At the same time, the State increased in population by an estimated 22,864 people (a 2% increase.)

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

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

Findings: The population of Pinelands municipalities shrank by about 1,482 people in 2016 compared to 2014 estimates. The Non-Pinelands region of southern New Jersey also saw a decrease in its population (down about 1,701 people). A growth trend in the Pinelands municipalities ended in 2015 when the estimated population fell for the first time since the 2010 Census. Statewide population is estimated to have increased by approximately 22,864 people between 2014 and 2016. That represents an increase of less than 1% overall.



Population Estimates

Region	2010 Census	2014	2016	2010 - 2016 Change	6-Year % Change
Pinelands	698,092	704,671	703,189	5,097	<1%
Non-Pinelands	1,723,949	1,725,427	1,723,726	-223	< -1%
State	10,077,763	10,257,101	10,279,965	202,202	2%

Most Pinelands municipalities lost population over the two-year period from 2014 to 2016. Maurice River saw the greatest rate of loss at -9% (a decrease of 678 people) since 2014. Other Pinelands municipalities with large decreases in absolute numbers were New Hanover Township (-590 people or 7% of its population), and Galloway Township (lost 571 people or 2% of its population.)

Twenty Pinelands municipalities grew in population between 2014 and 2016. In absolute numbers, Stafford Township topped the list with an increase of 460 people, representing a 2% growth in population. The other top gainers in absolute numbers were Little Egg Harbor Township with 439 people and Jackson Township with 398 people. The greatest relative growth was just over 3% in Ocean Township, which translates to 295 people in this municipality. Washington Township also achieved a growth rate of just over 3%, but that equates to only 22 people in this low-density municipality.

Estimated population changes since the 2010 census are presented in table P4, below. Notably, Maurice River also lost the greatest percentage of its population in the six-year period, 2010 – 2016. New Hanover Township appears to be reversing the upward growth trend of the six-year period. Lastly, Little Egg Harbor maintains positive population growth in the longer term, as well as in the most recent two years.

Table P4

Municipal Population Estimates

Municipality	County	2016	2014	2010 Census	Change 2010 - 2016	6 Year % Change
Maurice River Township	Cumberland	6562	7240	7976	-1414	-17.73%
Folsom Borough	Atlantic	1824	1852	1885	-61	-3.24%
Upper Township	Cape May	11976	12089	12373	-397	-3.21%
Buena Borough	Atlantic	4456	4542	4603	-147	-3.19%
Dennis Township	Cape May	6285	6353	6467	-182	-2.81%
Port Republic City	Atlantic	1085	1104	1115	-30	-2.69%
Hammonton Town	Atlantic	14428	14671	14791	-363	-2.45%
Medford Lakes Borough	Burlington	4053	4095	4146	-93	-2.24%
Southampton Township	Burlington	10235	10341	10464	-229	-2.19%
Wrightstown borough	Burlington	787	800	802	-15	-1.87%
Mullica Township	Atlantic	6041	6132	6147	-106	-1.72%
Galloway Township	Atlantic	36753	37324	37349	-596	-1.60%
Franklin Township	Gloucester	16568	16640	16820	-252	-1.50%
Buena Vista Township	Atlantic	7461	7537	7570	-109	-1.44%
Pemberton Township	Burlington	27567	27842	27912	-345	-1.24%
Egg Harbor City	Atlantic	4193	4259	4243	-50	-1.18%
Estell Manor City	Atlantic	1718	1736	1735	-17	-0.98%
Tabernacle Township	Burlington	6892	6959	6949	-57	-0.82%
Shamong Township	Burlington	6453	6491	6490	-37	-0.57%
Woodland Township	Burlington	1778	1786	1788	-10	-0.56%
Winslow Township	Camden	39328	39326	39499	-171	-0.43%
Evesham Township	Burlington	45351	45637	45538	-187	-0.41%
Hamilton Township	Atlantic	26499	26859	26503	-4	-0.02%
Bass River Township	Burlington	1443	1444	1443	0	0.00%
Eagleswood Township	Ocean	1604	1601	1603	1	0.06%
Chesilhurst Borough	Camden	1636	1626	1634	2	0.12%
Egg Harbor Township	Atlantic	43504	43861	43323	181	0.42%
Woodbine Borough	Cape May	2494	2488	2472	22	0.89%
Waterford Township	Camden	10754	10746	10649	105	0.99%
Berkeley Township	Ocean	41689	41627	41255	434	1.05%
Manchester Township	Ocean	43546	43535	43070	476	1.11%
Washington Township	Burlington	695	673	687	8	1.16%
Plumsted Township	Ocean	8530	8521	8421	109	1.29%
Beachwood Borough	Ocean	11196	11199	11045	151	1.37%
Lakehurst Borough	Ocean	2692	2694	2654	38	1.43%
Medford Township	Burlington	23440	23295	23033	407	1.77%
South Toms River Borough	Ocean	3761	3712	3684	77	2.09%
Monroe Township	Gloucester	36908	36775	36129	779	2.16%
Stafford Township	Ocean	27153	26693	26535	618	2.33%
Weymouth Township	Atlantic	2788	2737	2715	73	2.69%
Berlin Township	Camden	5513	5379	5357	156	2.91%
Lacey Township	Ocean	28569	28307	27644	925	3.35%
Jackson Township	Ocean	56733	56335	54856	1877	3.42%
Little Egg Harbor Township	Ocean	20818	20379	20065	753	3.75%
Barnegat Township	Ocean	22288	21992	20936	1352	6.46%
Ocean Township	Ocean	9013	8718	8332	681	8.17%
New Hanover Township	Burlington	8129	8719	7385	744	10.07%
<i>"Outside" Municipalities (Less than 10% of total area in Pinelands boundary)</i>						
Springfield Township	Burlington	3315	3365	3414	-99	-2.90%
North Hanover Township	Burlington	7581	7646	7678	-97	-1.26%
Vineland City	Cumberland	60525	61053	60724	-199	-0.33%
Berlin Borough	Camden	7594	7598	7588	6	0.08%
Toms River Township	Ocean	91837	90300	91239	598	0.66%
Corbin City	Atlantic	499	499	492	7	1.42%

R1

Home Transactions and Prices

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

Updated for 2017 LTEM with 2016 data

There were 2,246 homes sold in the Pinelands Area in 2016 at an average price of about \$232,000 (up 4% from 2014). In the Non-Pinelands, 21,260 homes were sold for an average of about \$302,000 (up 4% from 2014).

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

Unit of Analysis: Beginning with the *2014 Annual Report*, home sales data are categorized as being inside or outside the Pinelands Area boundary.

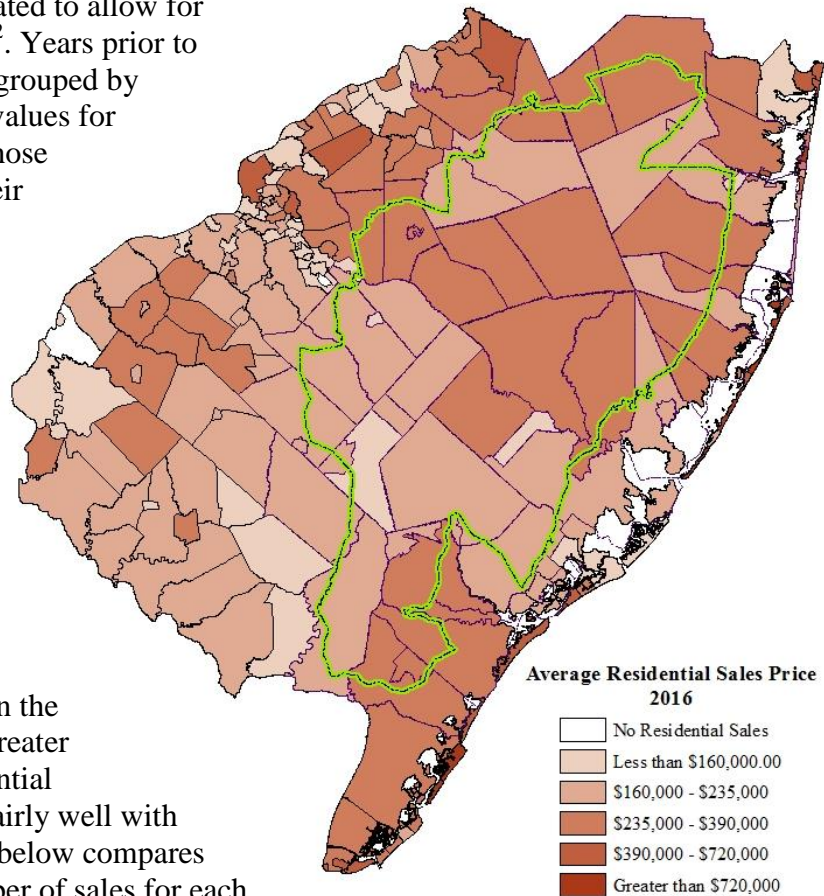
Usable residential sales are disaggregated to allow for inside/outside the Pinelands analysis¹². Years prior to 2014 are not disaggregated, but were grouped by municipality. Before 2014, reported values for non-Pinelands municipalities are all those jurisdictions with less than 10% of their land area inside the Pinelands boundary (municipally aggregated.)

After 2014, sales could be more specifically located inside or outside the Pinelands and therefore are disaggregated for some statistics in this section. Unless otherwise noted, the dollar amounts below are adjusted for inflation to 2016 dollars.

Findings:

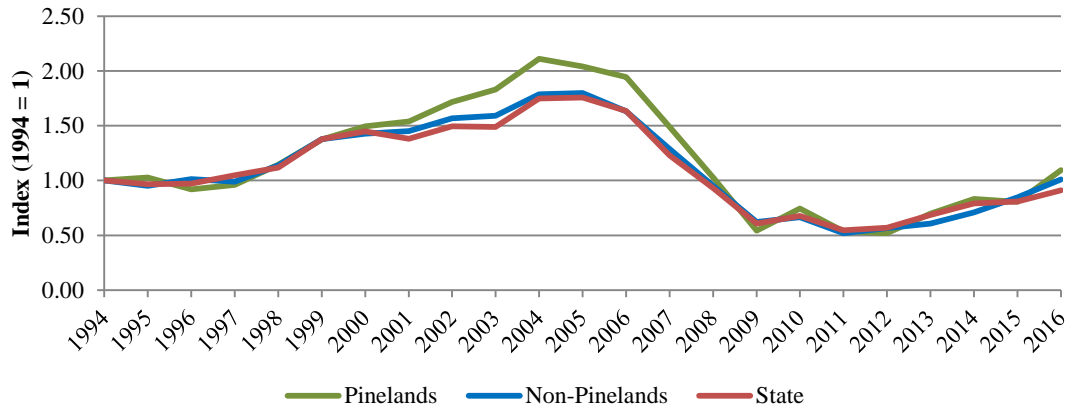
Regional-level transaction data:

Aside from a period in the 2000s when the Pinelands municipalities averaged a greater number of sales, the number of residential transactions from year-to-year track fairly well with the rest of the state. The index graph below compares number of sales each year to the number of sales for each region in 1994.



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

Index of Number of Residential Property Transactions



The number of home transactions in the Pinelands and across the State has continued to increase over the low in 2011. In 2016, the number of sales for all Pinelands municipalities (both inside and outside the Pinelands) totaled 6,538 for an average of 139 per municipality. This is a 32% increase over the years 2014 and 2015, when the number of sales totaled 4,964 and 4,815, respectively. Of that total number of sales, 2,246 were inside the Pinelands boundary.

The Non-Pinelands municipalities and the state also saw continuing increases in total residential sales of 42% in the Non-Pinelands and 15% across the state. The average number of transactions per municipality in Non-Pinelands towns was 94 in 2015 and 112 in 2016. For the State, municipalities averaged 106 in 2015 and 120 in 2016. Remarkably, the number of Pinelands transactions exceeds the number of Non-Pinelands sales as it has since 1994.

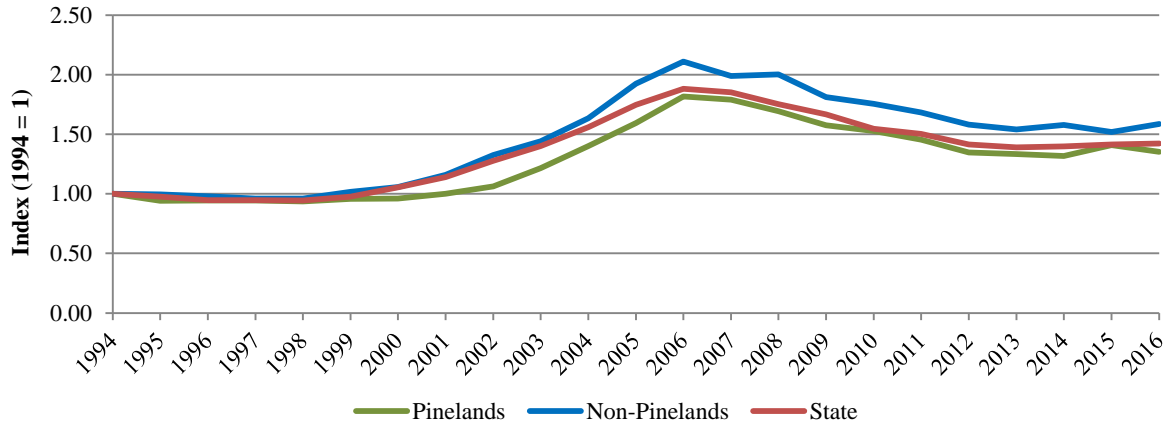
Regional selling price data:

Home selling prices have stabilized since 2012, across the State fluctuating by 3% or less after dropping from the high prices found in the early 2000s. In the Pinelands, with a smaller pool of sales, actual average selling prices went up by 7% from 2014 to 2015 and then dropped by 4% in 2016. The Non-Pinelands municipalities saw prices drop by 4% from 2014 to 2015 and then rebound by 4% in 2016.

The Pinelands average home price declined from an average of \$246,000 in 2015 to the average of \$236,000 in 2016. In the Non-Pinelands, prices increased from an average of \$297,000 in 2015 up to the average of \$310,000 in 2016. At the statewide level, average home prices increased each year from 2014 to 2016, starting at \$389,000 in 2014 up to \$393,000 in 2015 and then \$395,000 in 2016.

The chart below indexes selling prices of homes for the State, the Pinelands, and the Non-Pinelands averages. The index compares the annual average for each region against the average for that region in 1994 when long-term economic monitoring for the Pinelands was initiated. The index shows that the trend in Pinelands home prices follows approximately the same slope as both the State and the Non-Pinelands regions, although prices in the Pinelands tend to be lower on average than in the other regions. It should be noted that the Non-Pinelands average includes municipalities along the oceanfront where real estate prices are at a premium.

Index of Average Home Selling Prices



Sub-municipal data:

The sub-municipal data compares residential sales for municipalities that are split by the Pinelands boundary and it gives a snapshot of sales within different Pinelands Management Areas. For towns that had sales both inside the Pinelands and outside the Pinelands, the average difference in price was only 0.4%. There were several outliers in this dataset that contrasted with the average. Notably, the average price inside the Pinelands of the City of Port Republic was 83% higher than the City average. At the other end of the range, the average selling price outside the Pinelands of Little Egg Harbor Township was 60% higher than the average inside the Pinelands portion of the Township.

By Pinelands Management Area, Preservation Area homes commanded the highest average price at about \$294,000. Homes in the Regional Growth Area followed at about \$234,000. The homes with the lowest average prices were in the Pinelands Town areas.

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

Homes Sold by Management Area (2016)

Pinelands Management Area	Average Sales Price	# of Homes Sold
Regional Growth Area	\$234,786	1285
Rural Development Area	\$241,558	486
Pinelands Town	\$178,337	212
Pinelands Village	\$232,448	93
Forest Area	\$231,876	66
Agricultural Production Area	\$198,592	26
Preservation Area	\$294,260	15

Table R1a

Residential Housing Transactions

Municipality	County	2012	2013	2014	2015	2016	5-Year Average
Berkeley Township	Ocean	319	654	636	671	908	638
Jackson Township	Ocean	311	400	467	503	745	485
Manchester Township	Ocean	210	200	498	555	551	403
Evesham Township	Burlington	176	340	390	371	447	345
Galloway Township	Atlantic	209	266	122	283	273	231
Egg Harbor Township	Atlantic	258	107	279	234	259	227
Monroe Township	Gloucester	167	152	224	204	261	202
Medford Township	Burlington	49	195	215	267	254	196
Stafford Township	Ocean	237	105	108	110	373	187
Lacey Township	Ocean	129	191	215	92	305	186
Barnegat Township	Ocean	89	145	185	208	252	176
Winslow Township	Camden	59	163	215	178	252	173
Little Egg Harbor Township	Ocean	126	146	148	75	252	149
Hamilton Township	Atlantic	114	132	132	70	153	120
Southampton Township	Burlington	33	132	148	132	138	117
Pemberton Township	Burlington	91	104	124	122	138	116
Upper Township	Cape May	84	106	94	50	120	91
Ocean Township	Ocean	20	65	94	81	100	72
Franklin Township	Gloucester	56	34	84	79	90	69
Hammonton Town	Atlantic	54	70	89	29	90	66
Beachwood Borough	Ocean	31	63	65	72	37	54
Waterford Township	Camden	49	52	52	22	75	50
Shamong Township	Burlington	19	33	51	56	47	41
Plumsted Township	Ocean	31	17	46	47	61	40
Medford Lakes Borough	Burlington	17	31	56	42	44	38
Tabernacle Township	Burlington	28	46	15	49	48	37
Dennis Township	Cape May	21	38	26	16	49	30
Mullica Township	Atlantic	33	27	27	23	22	26
Buena Borough	Atlantic	11	25	20	24	31	22
Berlin Township	Camden	14	16	28	27	9	19
Buena Vista Township	Atlantic	3	16	22	18	24	17
Egg Harbor City	Atlantic	4	16	15	18	16	14
South Toms River Borough	Ocean	3	9	15	11	10	10
Estell Manor City	Atlantic	8	7	4	8	14	8
Woodland Township	Burlington	5	7	8	9	9	8
Folsom Borough	Atlantic	6	7	8	8	7	7
Lakehurst Borough	Ocean	5	3	3	9	15	7
Eagleswood Township	Ocean	5	8	7	5	9	7
Maurice River Township	Cumberland	4	8	7	4	11	7
New Hanover Township	Burlington	2	3	6	9	9	6
Port Republic City	Atlantic	5	5	5	8	6	6
Weymouth Township	Atlantic	3	8	5	1	6	5
Bass River Township	Burlington	4	5	1	6	6	4
Chesilhurst Borough	Camden	0	3	4	3	3	3
Washington Township	Burlington	1	1	0	5	5	2
Wrightstown Borough	Burlington	1	4	1	1	2	2
Woodbine Borough	Cape May	1	2	0	0	2	1
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	508	316	319	1,010	1,257	682
Vineland City	Cumberland	236	85	260	306	336	245
Berlin Borough	Camden	43	54	73	54	82	61
Springfield Township	Burlington	16	19	4	20	33	18
North Hanover Township	Burlington	6	13	13	27	17	15
Corbin City	Atlantic	2	4	0	4	1	2

Table R1b

Average Selling Price of Homes

Municipality	County	2012	2013	2014	2015	2016	5-Year % Change
New Hanover Township	Burlington	\$160,238	\$186,478	\$246,104	\$279,426	\$257,208	61%
Wrightstown Borough	Burlington	\$151,576	\$211,204	\$84,147	\$121,514	\$232,500	53%
Estell Manor City	Atlantic	\$173,385	\$214,780	\$286,403	\$234,724	\$250,529	44%
Buena Vista Township	Atlantic	\$148,789	\$246,072	\$213,851	\$205,105	\$189,996	28%
Eagleswood Township	Ocean	\$252,976	\$286,993	\$258,885	\$311,278	\$298,508	18%
Southampton Township	Burlington	\$181,006	\$198,924	\$189,878	\$197,380	\$213,444	18%
Weymouth Township	Atlantic	\$179,627	\$253,574	\$199,823	\$876,925	\$211,250	18%
Mullica Township	Atlantic	\$209,586	\$197,719	\$211,460	\$217,235	\$240,241	15%
South Toms River Borough	Ocean	\$148,440	\$175,648	\$159,560	\$164,200	\$164,550	11%
Medford Township	Burlington	\$332,256	\$390,908	\$362,412	\$362,970	\$360,872	9%
Berlin Township	Camden	\$182,246	\$180,161	\$166,675	\$161,493	\$197,256	8%
Jackson Township	Ocean	\$324,840	\$318,453	\$323,776	\$346,750	\$349,295	8%
Bass River Township	Burlington	\$174,443	\$243,348	\$418,706	\$263,347	\$287,750	6%
Woodland Township	Burlington	\$268,823	\$320,250	\$273,731	\$229,470	\$285,833	6%
Dennis Township	Cape May	\$230,525	\$257,447	\$243,043	\$250,546	\$244,980	6%
Waterford Township	Camden	\$183,097	\$170,544	\$186,057	\$182,839	\$192,729	5%
Winslow Township	Camden	\$182,925	\$183,319	\$183,522	\$188,211	\$192,461	5%
Port Republic City	Atlantic	\$339,217	\$346,928	\$207,932	\$254,299	\$355,383	5%
Beachwood Borough	Ocean	\$227,867	\$222,212	\$228,988	\$226,401	\$230,231	1%
Buena Borough	Atlantic	\$169,376	\$166,552	\$145,898	\$168,953	\$169,542	<1%
Franklin Township	Gloucester	\$213,077	\$201,006	\$216,170	\$203,066	\$212,717	<-1%
Upper Township	Cape May	\$370,230	\$324,231	\$356,420	\$355,875	\$367,041	<-1%
Plumsted Township	Ocean	\$316,529	\$358,657	\$331,238	\$361,236	\$313,302	-1%
Shamong Township	Burlington	\$346,727	\$384,085	\$343,269	\$334,936	\$342,570	-1%
Manchester Township	Ocean	\$181,016	\$137,053	\$170,606	\$167,437	\$178,096	-2%
Stafford Township	Ocean	\$282,476	\$227,644	\$260,058	\$267,535	\$276,258	-2%
Monroe Township	Gloucester	\$214,204	\$204,162	\$202,936	\$201,365	\$208,897	-2%
Ocean Township	Ocean	\$306,621	\$284,425	\$296,910	\$303,997	\$294,618	-4%
Tabernacle Township	Burlington	\$340,793	\$289,099	\$306,342	\$318,653	\$324,369	-5%
Medford Lakes Borough	Burlington	\$309,997	\$280,918	\$273,965	\$290,727	\$292,998	-5%
Barneget Township	Ocean	\$249,166	\$244,587	\$233,391	\$233,755	\$233,411	-6%
Maurice River Township	Cumberland	\$180,585	\$164,263	\$228,305	\$173,284	\$168,091	-7%
Berkeley Township	Ocean	\$203,100	\$170,193	\$174,135	\$178,083	\$187,583	-8%
Folsom Borough	Atlantic	\$191,910	\$214,103	\$185,022	\$226,636	\$175,357	-9%
Egg Harbor Township	Atlantic	\$226,672	\$236,915	\$238,965	\$246,110	\$206,673	-9%
Evesham Township	Burlington	\$295,634	\$266,040	\$267,507	\$271,883	\$269,343	-9%
Pemberton Township	Burlington	\$184,267	\$165,245	\$168,865	\$169,947	\$167,670	-9%
Little Egg Harbor Township	Ocean	\$218,692	\$197,825	\$216,565	\$196,437	\$195,880	-10%
Hamilton Township	Atlantic	\$206,094	\$200,208	\$194,357	\$180,564	\$180,346	-12%
Woodbine Borough	Cape May	\$282,246	\$165,100	n/a	n/a	\$247,500	-12%
Lacey Township	Ocean	\$324,073	\$283,299	\$268,538	\$249,447	\$276,276	-15%
Hammonton Town	Atlantic	\$236,961	\$237,293	\$210,654	\$219,243	\$201,913	-15%
Egg Harbor City	Atlantic	\$153,406	\$149,227	\$110,634	\$132,238	\$129,503	-16%
Galloway Township	Atlantic	\$208,907	\$207,041	\$182,904	\$180,442	\$175,354	-16%
Washington Township	Burlington	\$307,334	\$293,625	n/a	\$256,293	\$252,380	-18%
Lakehurst Borough	Ocean	\$252,328	\$152,822	\$173,025	\$197,032	\$169,420	-33%
Chesilhurst Borough	Camden	n/a	\$130,157	\$141,934	\$142,576	\$129,184	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	\$300,115	\$271,254	\$328,350	\$322,771	\$334,482	11%
Berlin Borough	Camden	\$223,772	\$250,806	\$229,901	\$226,144	\$226,928	1%
Vineland City	Cumberland	\$178,660	\$176,325	\$166,887	\$176,972	\$174,388	-2%
North Hanover Township	Burlington	\$347,214	\$313,160	\$291,925	\$336,938	\$338,838	-2%
Toms River Township	Ocean	\$360,785	\$281,317	\$278,668	\$292,820	\$323,328	-10%
Corbin City	Atlantic	\$337,127	\$150,702	n/a	\$174,296	\$272,000	-19%

Table R1c

2016 Pinelands Area Home Sales

Municipality	County	Inside Pinelands Area Boundary		Outside Pinelands Area Boundary	
		Number of Sales	Avg. Sales Price	Number of Sales	Avg. Sales Price
Buena Borough	Atlantic	8	\$147,125	22	\$176,037
Buena Vista Township	Atlantic	19	\$192,100	4	\$160,000
Egg Harbor City	Atlantic	16	\$129,503	-	-
Egg Harbor Township	Atlantic	164	\$212,795	92	\$193,997
Estell Manor City	Atlantic	14	\$233,828	0	-
Folsom Borough	Atlantic	7	\$175,357	-	-
Galloway Township	Atlantic	69	\$189,053	200	\$169,398
Hamilton Township	Atlantic	132	\$171,903	8	\$275,938
Hammonton Town	Atlantic	90	\$201,913	-	-
Mullica Township	Atlantic	22	\$240,241	-	-
Port Republic City	Atlantic	0	N/A	5	\$296,460
Weymouth Township	Atlantic	6	\$211,250	3	\$210,500
Bass River Township	Burlington	4	\$325,375	2	\$212,500
Evesham Township	Burlington	143	\$250,747	307	\$278,176
Medford Lakes Borough	Burlington	44	\$292,998	-	-
Medford Township	Burlington	201	\$373,206	44	\$298,285
New Hanover Township	Burlington	0	N/A	9	\$257,208
Pemberton Township	Burlington	135	\$167,783	2	\$160,000
Shamong Township	Burlington	47	\$342,570	-	-
Southampton Township	Burlington	107	\$191,950	32	\$292,800
Tabernacle Township	Burlington	48	\$324,369	-	-
Washington Township	Burlington	5	252380	0	-
Woodland Township	Burlington	9	\$285,833	-	-
Wrightstown Borough	Burlington	0	N/A	2	\$232,500
Berlin Township	Camden	1	\$215,000	7	\$215,771
Chesilhurst Borough	Camden	3	\$129,184	-	-
Waterford Township	Camden	75	\$192,729	-	-
Winslow Township	Camden	108	\$211,754	144	\$177,601
Dennis Township	Cape May	7	\$205,714	42	\$251,524
Upper Township	Cape May	4	\$285,250	116	\$369,861
Woodbine Borough	Cape May	2	\$247,500	-	-
Maurice River Township	Cumberland	4	\$188,000	7	\$156,714
Franklin Township	Gloucester	12	\$223,408	76	\$210,798
Monroe Township	Gloucester	135	\$200,292	119	\$212,832
Barnegat Township	Ocean	117	\$243,779	135	\$224,425
Beachwood Borough	Ocean	0	N/A	37	\$230,231
Berkeley Township	Ocean	75	\$179,679	832	\$188,210
Eagleswood Township	Ocean	0	N/A	9	\$298,508
Jackson Township	Ocean	34	\$318,081	694	\$350,870
Lacey Township	Ocean	2	412500	302	\$275,196
Lakehurst Borough	Ocean	14	\$171,529	1	\$139,900
Little Egg Harbor Township	Ocean	0	N/A	244	\$199,718
Manchester Township	Ocean	96	\$200,715	455	\$173,323
Ocean Township	Ocean	1	\$279,000	99	\$294,775
Plumsted Township	Ocean	3	298000	58	\$314,094
South Toms River Borough	Ocean	7	\$156,214	3	\$184,000
Stafford Township	Ocean	192	\$226,225	181	\$328,780
<i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i>					
Corbin City	Atlantic	0	N/A	1	\$272,000
North Hanover Township	Burlington	0	N/A	17	\$338,838
Springfield Township	Burlington	0	N/A	33	\$334,482
Berlin Borough	Camden	0	N/A	75	\$225,988
Vineland City	Cumberland	0	N/A	336	\$174,388
Toms River Township	Ocean	0	N/A	1257	\$323,328

E1

Per Capita Income

N.J. Department of Labor 1979, 1989, 1999, 2010, 2016/ESRI Data 2012

Last Updated for 2017 LTEM with 2016 data

Per capita income in 2016 increased for both the Pinelands and the Non-Pinelands regions since 2014. Per capita income was up by less than 1% in the Pinelands and up by 15% in the Non-Pinelands over the two-year period. The State has experienced a 3% decrease in per capita income since 2014, down to \$35,673.

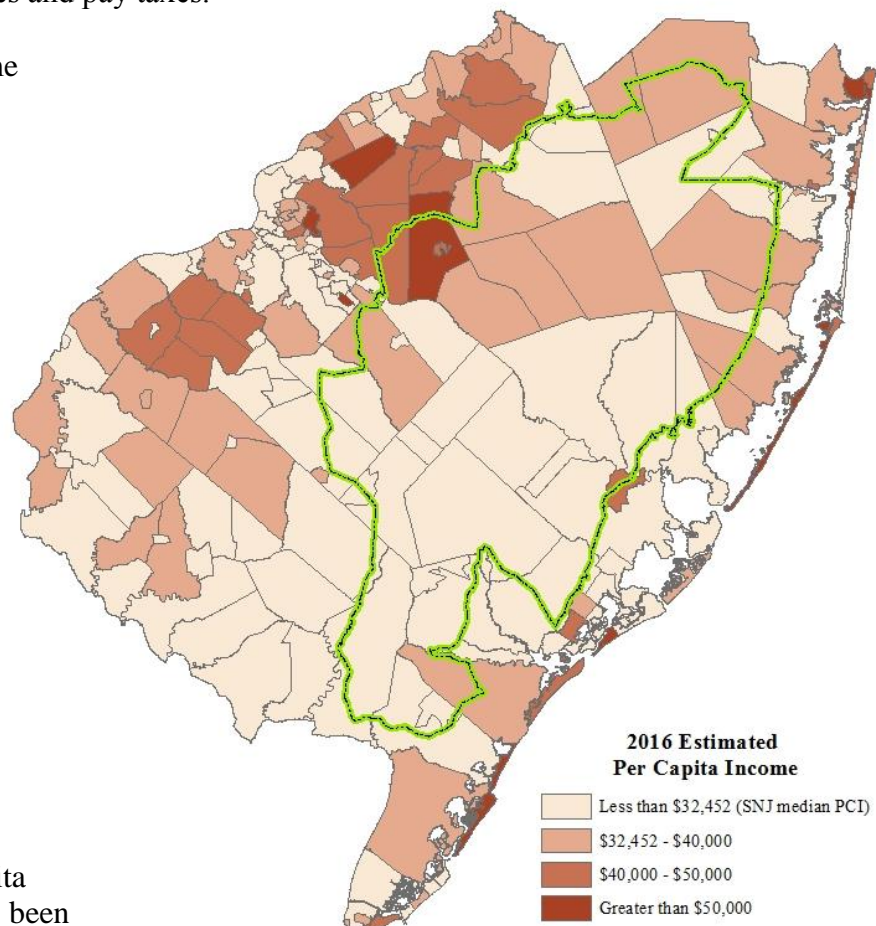
Description: Per capita income is an important indicator of regional economic health because it provides information regarding the ability of a region's residents to make purchases and pay taxes.

Unit of Analysis: Per capita income data is compiled at the municipal level. Municipal data is regionally aggregated and averaged to allow for inside/outside the Pinelands and statewide analysis. Unless otherwise noted, the dollar amounts below are adjusted for inflation to 2016 dollars.

Findings: Per capita income has risen across southern New Jersey by more than 50% since the Pinelands was established in 1979. In that year, per capita income across the region was approximately \$24,300 and it has risen to \$37,600. The State average per capita income rose 45% from about \$27,500 to over \$39,900.

Since 2014, the increase in per capita income in southern New Jersey has been led by the Non-Pinelands municipalities. These municipalities saw a 15% increase in per capita income over the two-year period ending in 2016, with an average per capita income of \$39,560. For comparison, the Pinelands municipalities had a very minimal reduction (less than 0.5%) in per capita income between 2014 and 2016, starting at \$31,167 and ending at \$31,049. In the same two-year period, the State average per capita income rose about 8% from \$36,962 to \$39,944.

The table below shows average per capita income for the State, the Pinelands and the Non-Pinelands regions for selected years starting in 1979 and ending in 2016.



Average per Capita Income

Region	1979	1989	1999	2010	2014 Estimate	2016	Change 2014 - 2016	Change 1979 - 2016
Pinelands	\$21,538	\$29,099	\$31,611	\$32,845	\$31,167	\$31,049	0%	44%
Non-Pinelands	\$25,196	\$34,919	\$36,107	\$36,941	\$34,289	\$39,560	15%	57%
State	\$27,458	\$37,019	\$39,762	\$39,212	\$36,962	\$35,673	-3%	30%

According to Census estimates, Medford Township has the highest per capita income of all Pinelands municipalities at \$51,713. The second closest in per capita income was Medford Lakes Borough at \$47,373. The other municipalities topping a \$40,000 per capita income were Evesham Township, and the City of Port Republic. Maurice River Township had the lowest estimated per capita income at \$15,669. Other municipalities where the per capita income was under \$20,000 in 2016 are New Hanover Township, Woodbine Borough, and South Toms River Borough.

As noted previously, changes in per capita income in Pinelands municipalities averaged out to less than 0.5%. Per capita income estimates for 2016 indicate that 24 Pinelands municipalities experienced a decrease by an average of just over 9% below per capita income from 2014. The remaining municipalities had an increase in average per capita income of slightly less than 9%. Continuing a long-time pattern, municipalities at the boundaries of the Pinelands region tend to have a higher average per capita income. The table below lists average per capita income for all municipalities that have land in the Pinelands boundary.

Table E1

Per Capita Income

Municipality	County	1989	1999	2010	2014 Estimate	2016	Estimated % Change 2014- 2016
Medford Township	Burlington	\$48,629	\$56,892	\$51,662	\$51,005	\$51,713	1%
Medford Lakes Borough	Burlington	\$43,852	\$46,205	\$54,882	\$48,827	\$47,373	-3%
Port Republic City	Atlantic	\$34,819	\$35,879	\$40,955	\$33,400	\$44,574	33%
Evesham Township	Burlington	\$39,535	\$43,425	\$44,895	\$44,185	\$43,130	-2%
Shamong Township	Burlington	\$37,209	\$45,545	\$43,665	\$45,360	\$38,008	-16%
Tabernacle Township	Burlington	\$40,194	\$41,040	\$41,313	\$43,425	\$37,144	-14%
Upper Township	Cape May	\$34,847	\$40,486	\$43,536	\$38,074	\$37,057	-3%
Jackson Township	Ocean	\$31,860	\$35,308	\$38,832	\$37,738	\$36,936	-2%
Southampton Township	Burlington	\$33,007	\$39,719	\$38,801	\$35,806	\$35,939	0%
Stafford Township	Ocean	\$28,936	\$37,393	\$35,648	\$34,391	\$35,576	3%
Ocean Township	Ocean	\$26,634	\$33,613	\$41,503	\$37,399	\$35,564	-5%
Plumsted Township	Ocean	\$29,733	\$33,029	\$33,681	\$35,904	\$35,122	-2%
Lacey Township	Ocean	\$29,431	\$34,064	\$35,493	\$34,387	\$34,771	1%
Woodland Township	Burlington	\$22,088	\$38,466	\$37,742	\$30,948	\$34,505	11%
Eagleswood Township	Ocean	\$25,973	\$30,355	\$31,649	\$29,424	\$33,218	13%
Winslow Township	Camden	\$27,726	\$31,293	\$31,367	\$30,773	\$32,684	6%
Monroe Township	Gloucester	\$27,186	\$30,165	\$31,801	\$31,431	\$32,326	3%
Mullica Township	Atlantic	\$27,415	\$29,099	\$29,491	\$27,476	\$31,622	15%
Washington Township	Burlington	\$34,115	\$20,579	\$27,906	\$31,386	\$31,509	0%
Bass River Township	Burlington	\$25,712	\$30,009	\$27,492	\$31,384	\$31,450	0%
Waterford Township	Camden	\$28,891	\$31,914	\$35,089	\$32,745	\$31,399	-4%
Little Egg Harbor Township	Ocean	\$28,173	\$30,358	\$32,134	\$28,811	\$31,327	9%
Franklin Township	Gloucester	\$26,725	\$29,854	\$36,155	\$32,827	\$31,175	-5%
Berkeley Township	Ocean	\$27,405	\$32,683	\$31,686	\$28,127	\$31,025	10%
Estell Manor City	Atlantic	\$30,978	\$28,665	\$31,315	\$27,881	\$30,906	11%
Manchester Township	Ocean	\$29,486	\$32,993	\$30,669	\$27,529	\$30,704	12%
Hamilton Township	Atlantic	\$31,547	\$31,374	\$28,451	\$25,429	\$30,296	19%
Hammonton Town	Atlantic	\$30,938	\$29,283	\$29,393	\$25,924	\$30,262	17%
Barnegat Township	Ocean	\$51,378	\$28,426	\$32,838	\$29,365	\$30,163	3%
Egg Harbor Township	Atlantic	\$31,379	\$32,874	\$32,750	\$29,485	\$29,969	2%
Weymouth Township	Atlantic	\$26,802	\$27,955	\$32,461	\$29,727	\$29,224	-2%
Folsom Borough	Atlantic	\$26,222	\$30,355	\$33,124	\$31,779	\$28,794	-9%
Beachwood Borough	Ocean	\$28,703	\$31,283	\$31,909	\$30,907	\$28,774	-7%
Galloway Township	Atlantic	\$32,248	\$30,990	\$27,337	\$29,373	\$28,438	-3%
Dennis Township	Cape May	\$30,268	\$31,589	\$34,360	\$35,307	\$28,201	-20%
Buena Borough	Atlantic	\$23,585	\$24,613	\$25,922	\$22,515	\$27,126	20%
Lakehurst Borough	Ocean	\$20,761	\$27,076	\$30,565	\$23,733	\$26,841	13%
Buena Vista Township	Atlantic	\$24,952	\$27,064	\$29,967	\$24,890	\$26,313	6%
Berlin Township	Camden	\$26,713	\$32,652	\$29,454	\$28,453	\$26,293	-8%
Pemberton Township	Burlington	\$24,944	\$28,325	\$29,517	\$26,552	\$26,163	-1%
Wrightstown Borough	Burlington	\$16,955	\$21,333	\$27,257	\$27,282	\$22,817	-16%
Chesilhurst Borough	Camden	\$22,147	\$22,456	\$27,724	\$26,449	\$22,783	-14%
Egg Harbor City	Atlantic	\$24,709	\$22,307	\$25,078	\$21,822	\$20,525	-6%
South Toms River Borough	Ocean	\$19,841	\$23,987	\$21,572	\$21,568	\$19,882	-8%
Woodbine Borough	Cape May	\$14,891	\$19,634	\$17,699	\$19,162	\$17,907	-7%
New Hanover Township	Burlington	\$17,948	\$17,874	\$17,309	\$21,285	\$16,124	-24%
Maurice River Township	Cumberland	\$20,155	\$25,237	\$17,666	\$23,183	\$15,669	-32%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Springfield Township	Burlington	\$36,708	\$43,172	\$42,635	\$43,441	\$41,140	-5%
Berlin Borough	Camden	\$31,209	\$36,330	\$37,877	\$35,268	\$38,442	9%
Toms River Township	Ocean	\$34,232	\$36,823	\$37,597	\$36,296	\$36,155	0%
Corbin City	Atlantic	\$29,896	\$31,392	\$31,887	\$27,829	\$30,169	8%
Vineland City	Cumberland	\$25,643	\$27,675	\$27,573	\$25,124	\$23,886	-5%
North Hanover Township	Burlington	\$22,238	\$25,884	\$33,217	\$28,178	\$23,514	-17%

E2

Unemployment

N.J. Department of Labor 1990 - 2016

Updated for 2017 LTEM with 2016 data

Between 2015 and 2016, all three regions saw a decrease in estimated unemployment rates of about 1%. The Pinelands rate dropped by 1.2 points to 5.8%, while the Non-Pinelands fell by 1.1 points to 5.6% and the state fell by 0.7 points to 4.9%.

Description: The estimated unemployment rate is a percentage that reflects the number of people in a given area who wish to be employed, but are not employed for any number of reasons. The unemployment rate estimate is determined by dividing the estimated number of unemployed persons in a given area by the estimated total number of employed and unemployed individuals (labor force).

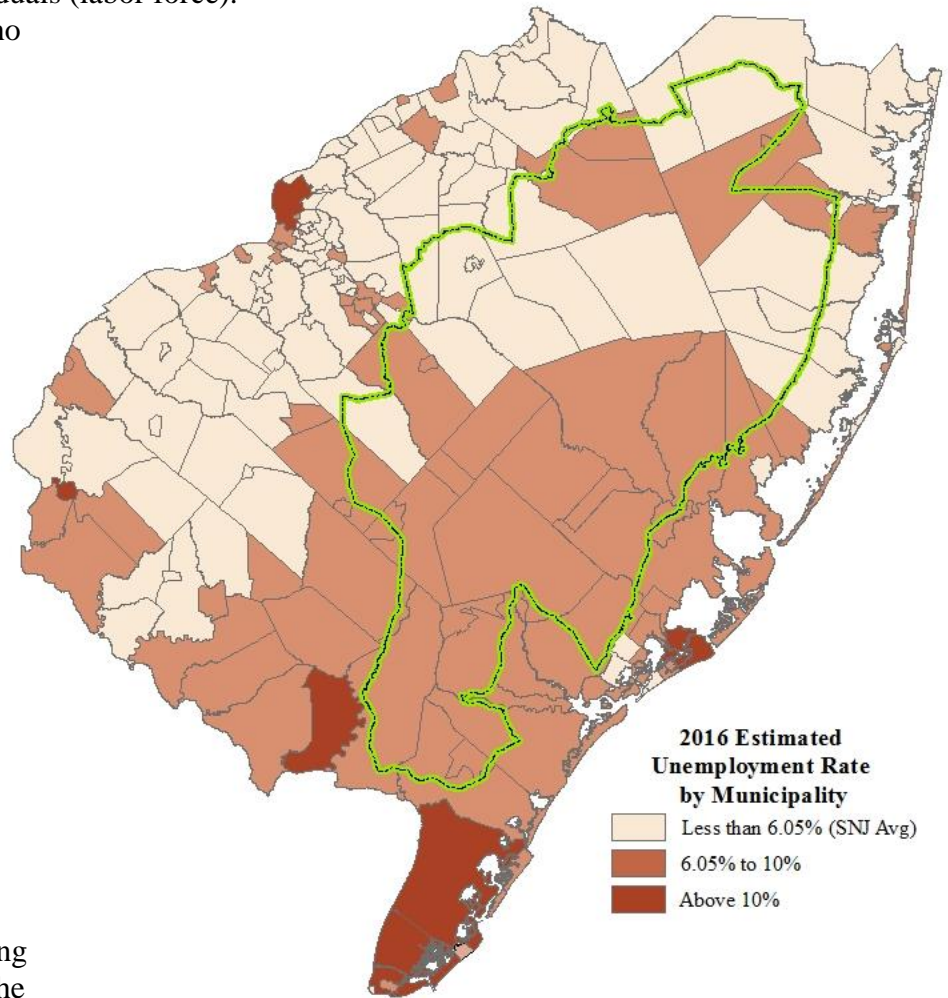
This rate does not reflect those who are underemployed or those who were previously considered unemployed, but have stopped looking for work.

Unit of Analysis:

Municipal-level data is regionally aggregated to allow for inside/outside the Pinelands and statewide analysis.¹³

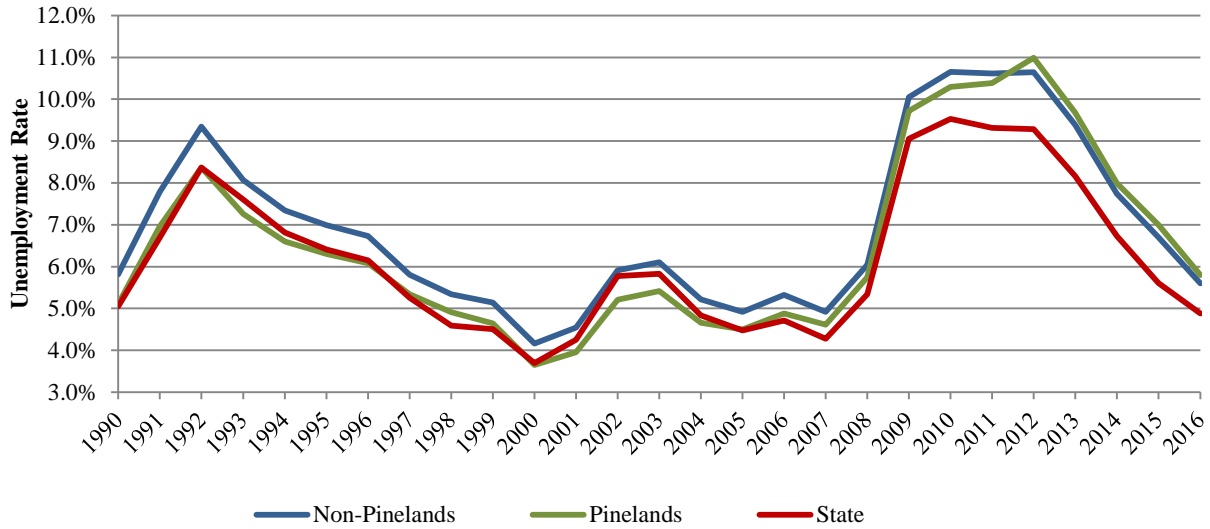
Findings: Unemployment continues to decrease in all regions of the State, although it has not reached lows last seen in the early 2000s. As can be seen in the graph below of the years 1990 to 2016, starting in 2012 the Pinelands region has had the highest percentage of unemployment among the identified regions of the State.

This reverses the pattern prior to 2012 of the Pinelands region having a lower unemployment rate than the Non-Pinelands region, and at times, experiencing lower unemployment rates than the State average. For 2016, the average rate of unemployment in the Pinelands was 5.8% and for all southern New Jersey it was 6.0%. The average unemployment rates in the Non-Pinelands and Pinelands municipalities are within tenths of a percentage point since 2012.



¹³ Due to changes in labor force and unemployment estimation methods, some data may exhibit significant changes from data using a different calculation method. Therefore, some timeframes are not fully comparable to each other. These timeframes are: 1990 to 1999, 2000 to 2004, 2005 to 2009, and 2010 to present.

Estimated Unemployment Rate (see footnote above)



Among the municipalities in the Pinelands region, Mullica Township experienced the highest unemployment rate in 2016 at 9.2%, a 2.4 percentage-point decrease from 2015. Interestingly, that 2.4 percentage point decrease experienced in Mullica was also the greatest decrease in the unemployment rate in the Pinelands municipalities. Egg Harbor City also had an unemployment rate of 9.2% (a 2.3 percentage-point decrease), followed by Buena Vista Township and then Maurice River Township, which had rates of 9.0% and 8.9%, respectively. Those municipalities with the lowest unemployment rates in 2016 were Medford Township at 3.4% (a 0.7 percentage-point decrease from 2015), Medford Lakes Borough at 3.6% and Evesham Township, also at 3.6%. No Pinelands municipality experienced a rise in unemployment over 2015 rates.

The graph below documents recent years’ unemployment trends for counties in southern New Jersey. The rank of each county relative to the others in the region remains fairly consistent through the period from 2010 to 2016 with Burlington County always having the lowest unemployment rate and Cape May County always having the highest rate. For reference, the average rate for the Pinelands Region is also included on the graph.

Average Unemployment for Southern New Jersey Counties

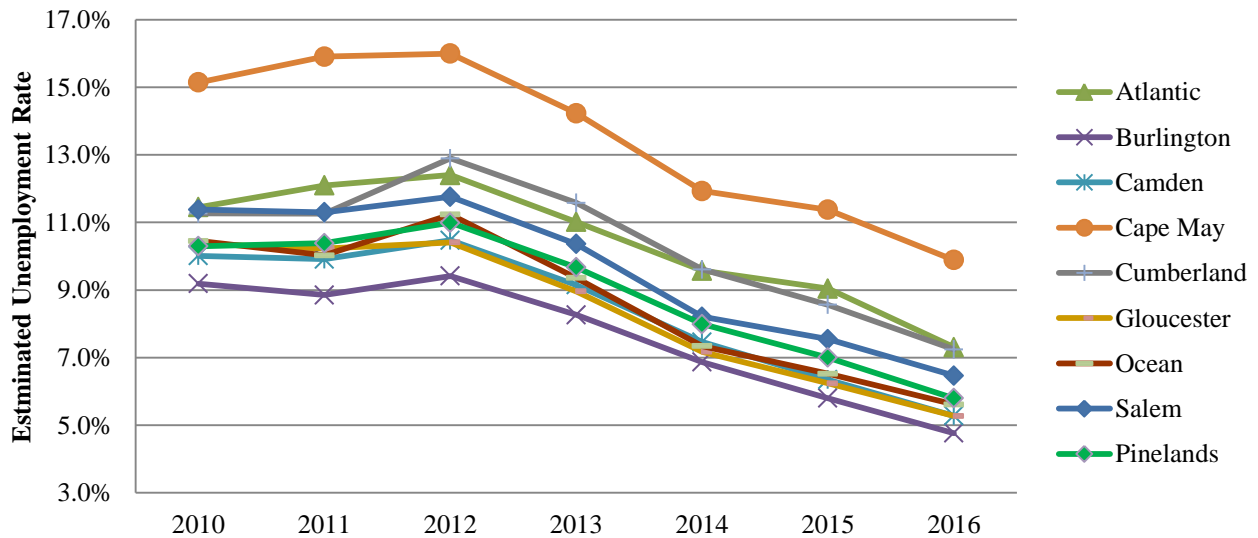


Table E2

Estimated Unemployment Rates

County	Municipality	2012	2013	2014	2015	2016	4-Year Change (% Points)
Atlantic	Mullica Township	16.8%	13.5%	11.3%	11.6%	9.2%	-7.6%
Atlantic	Egg Harbor City	13.8%	12.0%	10.6%	11.5%	9.2%	-4.6%
Atlantic	Buena Vista Township	15.3%	12.9%	10.6%	10.4%	9.0%	-6.3%
Cumberland	Maurice River Township	14.7%	13.4%	11.4%	10.4%	8.9%	-5.8%
Cape May	Woodbine Borough	13.3%	12.5%	10.5%	10.0%	8.6%	-4.6%
Atlantic	Folsom Borough	13.8%	10.9%	10.2%	9.3%	8.6%	-5.3%
Ocean	South Toms River Borough	12.9%	11.9%	9.9%	8.5%	7.9%	-5.0%
Atlantic	Estell Manor City	14.3%	12.3%	10.1%	8.6%	7.7%	-6.6%
Burlington	New Hanover Township	13.0%	12.4%	9.8%	8.6%	7.6%	-5.5%
Atlantic	Port Republic City	11.9%	10.1%	8.3%	8.2%	7.5%	-4.4%
Burlington	Bass River Township	17.2%	13.8%	10.5%	9.9%	7.5%	-9.6%
Camden	Chesilhurst Borough	15.1%	11.7%	10.5%	8.4%	7.4%	-7.7%
Atlantic	Buena Borough	14.3%	12.7%	9.6%	9.5%	7.3%	-7.0%
Cape May	Dennis Township	13.2%	11.8%	9.9%	8.0%	7.0%	-6.2%
Atlantic	Weymouth Township	12.1%	10.1%	9.1%	8.8%	7.0%	-5.1%
Atlantic	Hammonton Town	11.0%	10.1%	8.3%	8.4%	6.9%	-4.1%
Ocean	Lakehurst Borough	12.8%	10.0%	9.2%	8.0%	6.9%	-5.9%
Atlantic	Hamilton Township	11.8%	11.0%	9.6%	8.8%	6.8%	-5.1%
Ocean	Manchester Township	12.8%	11.8%	9.1%	7.8%	6.7%	-6.0%
Gloucester	Franklin Township	12.4%	11.1%	9.0%	8.0%	6.7%	-5.7%
Ocean	Berkeley Township	13.2%	11.2%	9.0%	8.0%	6.7%	-6.5%
Atlantic	Egg Harbor Township	11.8%	10.7%	9.7%	8.9%	6.7%	-5.1%
Burlington	Washington Township	10.9%	10.0%	8.7%	7.9%	6.7%	-4.2%
Cape May	Upper Township	10.9%	9.7%	8.0%	8.3%	6.6%	-4.3%
Atlantic	Galloway Township	11.5%	10.4%	9.5%	8.7%	6.6%	-4.9%
Camden	Berlin Township	12.7%	10.1%	8.4%	7.2%	6.5%	-6.2%
Burlington	Pemberton Township	12.0%	10.5%	8.8%	7.8%	6.5%	-5.4%
Ocean	Eagleswood Township	12.3%	9.8%	8.9%	6.8%	6.5%	-5.9%
Ocean	Little Egg Harbor Township	13.1%	11.0%	8.6%	8.0%	6.4%	-6.7%
Camden	Winslow Township	11.3%	10.0%	8.1%	7.2%	6.1%	-5.2%
Ocean	Ocean Township	12.2%	9.9%	8.4%	6.9%	5.9%	-6.3%
Camden	Waterford Township	11.9%	10.3%	8.7%	7.2%	5.8%	-6.1%
Gloucester	Monroe Township	10.6%	9.7%	8.0%	6.8%	5.7%	-4.9%
Burlington	Wrightstown Borough	10.0%	8.2%	7.4%	6.4%	5.6%	-4.4%
Ocean	Barneget Township	11.2%	9.9%	8.0%	6.6%	5.5%	-5.7%
Ocean	Stafford Township	10.7%	8.8%	7.1%	6.1%	5.3%	-5.5%
Burlington	Southampton Township	11.3%	9.6%	7.7%	6.3%	5.3%	-6.1%
Ocean	Plumsted Township	9.7%	9.2%	7.7%	6.0%	5.2%	-4.5%
Burlington	Woodland Township	9.5%	8.3%	6.8%	5.6%	5.2%	-4.4%
Ocean	Lacey Township	10.4%	9.2%	7.0%	5.7%	5.1%	-5.3%
Ocean	Beachwood Borough	9.8%	8.3%	6.6%	6.1%	4.9%	-4.9%
Ocean	Jackson Township	9.4%	8.3%	6.7%	5.6%	4.8%	-4.6%
Burlington	Tabernacle Township	9.0%	7.5%	5.8%	5.7%	4.7%	-4.3%
Burlington	Shamong Township	8.1%	7.4%	5.5%	5.1%	4.3%	-3.8%
Burlington	Evesham Township	7.0%	6.1%	4.9%	4.3%	3.6%	-3.4%
Burlington	Medford Lakes Borough	7.3%	6.2%	5.2%	4.4%	3.6%	-3.7%
Burlington	Medford Township	6.8%	6.0%	5.1%	4.1%	3.4%	-3.4%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Atlantic	Corbin City	11.8%	8.6%	7.3%	8.6%	7.5%	-4.2%
Cumberland	Vineland City	12.9%	11.5%	9.7%	8.5%	7.2%	-5.7%
Burlington	North Hanover Township	10.3%	8.0%	7.1%	6.7%	5.4%	-4.9%
Camden	Berlin Borough	9.6%	8.3%	7.0%	5.7%	5.0%	-4.5%
Ocean	Toms River Township	10.0%	9.0%	6.7%	5.9%	4.9%	-5.0%
Burlington	Springfield Township	7.6%	7.2%	6.0%	5.3%	3.8%	-3.8%

E3

Employment, Establishments, Wages

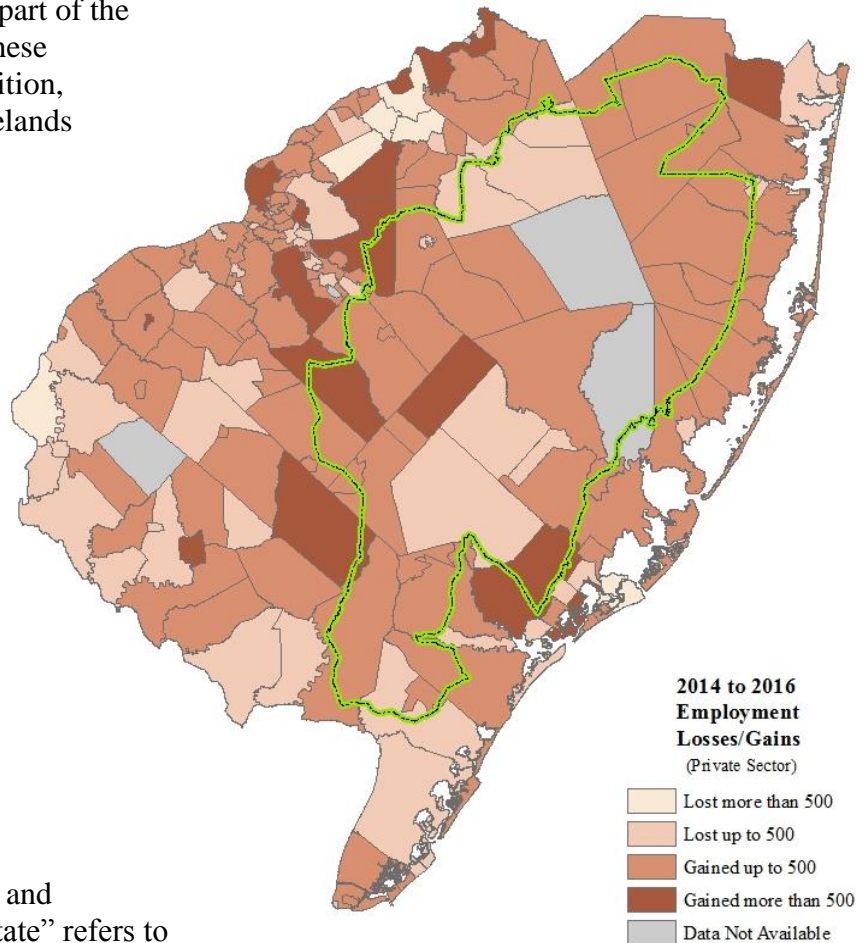
N.J. Department of Labor 2004 – 2013, 2016/ESRI Data 2012

Updated for 2017LTEM with 2016 data

Since 2014, the number of Pinelands establishments has grown by 0.8% to 12,783. The number of private sector establishments in the State grew by 1.5% over that time period. In the Non-Pinelands region, the number of establishments grew most slowly, by only 0.6% to 41,328.

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. These variables help to describe the composition, size, strength, and location of the Pinelands job market.

Unit of Analysis: 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 2016 dollars. Municipal level data is regionally aggregated to allow for inside/outside the Pinelands and statewide analysis. In this section, “state” refers to aggregated municipal and undistributed data. Due to data suppression, some municipalities may not be fully represented in the narratives.



Findings:

Private Sector Employment

Across all southern New Jersey municipalities, growth in the number of jobs achieved 2.6% between 2014 and 2016. In the Pinelands, jobs grew by 6%, trailed by the Non-Pinelands region at almost 2% and the State at 3%. The number of jobs has grown steadily in the Pinelands region since 2012, up 11% to 152,754 positions. In the Non-Pinelands municipalities, the rate of growth since 2012 was slower at only

3%, while the number of jobs in the State grew by 6% over that same five-year period. This growth in the Pinelands brought complete rebound to the number of jobs in the Pinelands before the 2008 recession.

Private Sector Employment by Municipal Aggregate

Region	2012	2013	2014	2015	2016	5 Year Change
Pinelands	137,162	140,446	143,934	149,390	152,754	11.4%
Non-Pinelands	589,572	595,365	599,426	599,019	609,757	3.4%
State	3,151,628	3,208,738	3,236,358	3,277,289	3,347,360	6.2%

At a local level in Pinelands municipalities, between 2015 and 2016 Washington Township saw the greatest percentage gains in employment by increasing 193% (158 jobs), followed by the City of Estell Manor (posting 50% gain), and Chesilhurst Borough (seeing a gain of approximately 21%). At least ten municipalities saw *decreases* in employment. Dennis Township saw the greatest percentage loss of about 8% (118 jobs). Medford Lakes Borough, New Hanover Township, and Weymouth Township also lost jobs, or about 5% to 7% of their private sector jobs. The 2013 data for two municipalities – Bass River Township and Woodland Township – were not available and are not discussed here.

See table E3a, below, for more detail on employment rates for individual Pinelands municipalities.

Private Sector Establishments¹⁴

The number of private sector establishments fluctuates in the Pinelands from year to year. From 2014 to 2015, the number decreased slightly, but recovered in 2016 to exceed the number in both 2014 and 2015. On the five-year trend, the number of Pinelands establishments has grown by 1.7%. Similarly, across the State and in the Non-Pinelands region, establishments declined from 2014 to 2015, only to recover in 2016. The number of establishments in the State rose by 2.6%, and the Non-Pinelands region grew by less than 1% since 2012.

Regional Private Sector Establishments by Municipal Aggregate

Region	2012	2013	2014	2015	2016	5 Year Change
Pinelands	12,571	12,409	12,678	12,627	12,783	1.7%
Non-Pinelands	41,039	40,659	41,069	40,802	41,328	0.7%
State	250,148	249,698	252,989	252,449	256,710	2.6%

Of the 45 Pinelands municipalities whose data was not suppressed, 28 saw increases in the number of establishments between 2015 and 2016. Washington Township experienced the largest percent increase at 15%, and that reflected the addition of two businesses. Port Republic City, Estell Manor City, and Chesilhurst Borough all had increases of over 10% in number of establishments, (two, three, and two, respectively.) The largest absolute gain in number of establishments between 2015 and 2016 occurred in Monroe Township, where 26 establishments were added after 2015.

Fourteen of the Pinelands municipalities experienced a loss of establishments. Two towns with the highest percentage of losses were New Hanover Township (10 establishments or 8% of the total in 2015) and Woodbine Borough (five establishments for almost 7% of the 2015 total). Medford Township lost

¹⁴ Due to lack of data, Bass River Township and Woodland Township are not fully represented in the *Establishments* narrative. Please see Table E3b for details.

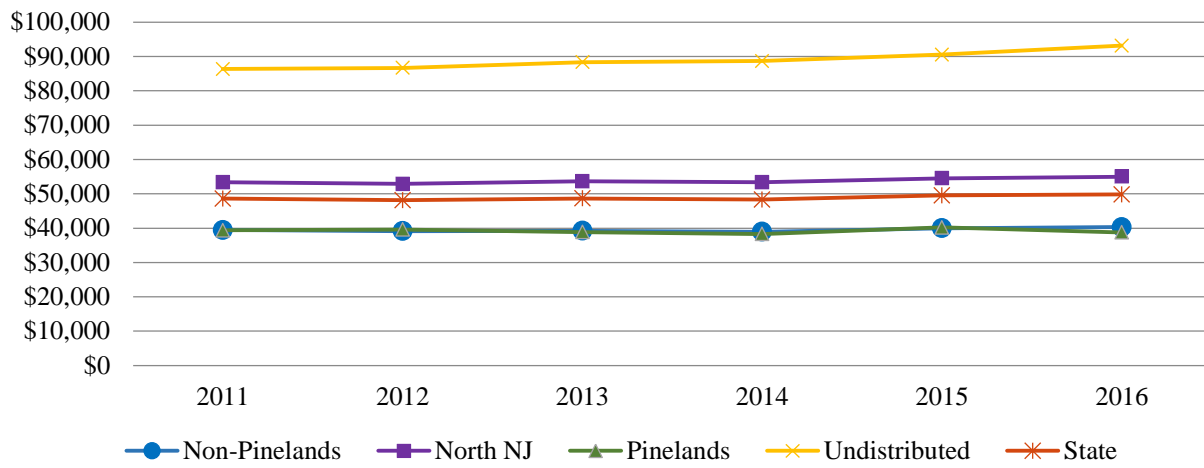
the greatest absolute number of establishments over the one-year period, down 14 to a total of 738 in 2016. Four municipalities did not see a change in the number of establishments.

Details for private sector establishments for Pinelands municipalities can be seen in Table E3b, below.

Average of Private Sector Average Annual Wages

In 2016, the Pinelands saw a 4% dip in average annual wages to \$38,765 after increasing from 2014 to 2015. Average annual wages in the Non-Pinelands and the state both increased by less than 1% in 2016, continuing a three-year trend of small increases. The graph below represents six years of average annual wages for multiple regions and shows wages have been relatively flat in New Jersey.

Average Annual Wages (Private Sector)



Regional Private Sector Average of Average Annual Wages by Municipal Aggregate

Region	2012	2013	2014	2015	2016	5 Year Change
Pinelands	\$39,610	\$38,870	\$38,288	\$40,224	\$38,765	-2%
Non-Pinelands	\$39,139	\$39,214	\$38,965	\$39,984	\$40,320	3%
State	\$48,116	\$48,657	\$48,306	\$49,525	\$49,825	4%

Of the 18 Pinelands municipalities that showed a decline in average annual wages between 2015 and 2016, three had wages decline by more than 10%. Meanwhile, another 10 municipalities saw average wages drop by 1% - 10%. The average one-year decline was 8%. The largest decline occurred in Medford Lakes Borough, where average annual wages declined by 46% to \$28,183. Washington Township and Port Republic City also saw average wages decline by more than 10%.

Average annual wages increased in 26 Pinelands municipalities in 2016. Weymouth Township experienced an increase of about 11% to \$41,640 (up \$3,984). Five municipalities saw increases greater than 5% while three saw increases of less than 1%. Franklin Township average wages grew almost 7%; Wrightstown Borough by just over 6%; and Pemberton by slightly less than 6%. The average increase was 4%.

Average wages for all Pinelands municipalities are detailed in table E3c, below.

Table E3a

Private Sector Employment

Municipality	County	2012	2013	2014	2015	2016	5 Year Change
Evesham Township	Burlington	23,319	24,809	25,799	28,878	29,181	25%
Egg Harbor Township	Atlantic	11,813	11,711	11,889	12,764	13,452	14%
Jackson Township	Ocean	8,811	9,071	9,358	9,509	9,767	11%
Galloway Township	Atlantic	7,819	7,835	8,072	8,043	8,232	5%
Stafford Township	Ocean	7,403	8,027	7,827	7,963	8,036	9%
Hammonton Town	Atlantic	7,539	7,296	7,463	7,734	7,964	6%
Hamilton Township	Atlantic	7,208	7,434	7,473	7,430	7,264	1%
Medford Township	Burlington	6,278	6,478	6,535	6,874	6,868	9%
Monroe Township	Gloucester	5,518	5,542	5,722	5,940	6,306	14%
Winslow Township	Camden	5,270	5,458	5,640	5,776	5,994	14%
Lacey Township	Ocean	5,099	5,177	5,279	5,232	5,318	4%
Berlin Township	Camden	4,647	4,879	5,039	5,127	5,148	11%
Manchester Township	Ocean	3,637	3,700	3,797	3,849	3,843	6%
Berkeley Township	Ocean	3,109	3,162	3,186	3,225	3,311	6%
Upper Township	Cape May	2,374	2,433	2,612	2,712	2,880	21%
Egg Harbor City	Atlantic	2,521	2,536	2,540	2,390	2,515	0%
Pemberton Township	Burlington	2,374	2,330	2,410	2,348	2,365	0%
Southampton Township	Burlington	2,194	2,343	2,345	2,351	2,327	6%
Barnegat Township	Ocean	1,623	1,816	1,849	1,955	2,179	34%
Waterford Township	Camden	1,886	1,770	1,931	2,070	2,080	10%
Little Egg Harbor Township	Ocean	1,607	1,745	1,770	1,819	2,076	29%
Franklin Township	Gloucester	1,542	1,597	1,577	1,589	1,578	2%
Dennis Township	Cape May	1,488	1,547	1,542	1,531	1,413	-5%
Ocean Township	Ocean	929	1,081	1,227	1,139	1,246	34%
Buena Borough	Atlantic	715	791	979	1,080	1,130	58%
Shamong Township	Burlington	832	860	888	948	992	19%
New Hanover Township	Burlington	1,432	1,272	1,131	959	905	-37%
Eagleswood Township	Ocean	728	879	827	820	864	19%
Folsom Borough	Atlantic	711	723	770	793	820	15%
Plumsted Township	Ocean	721	737	735	798	814	13%
Lakehurst Borough	Ocean	765	765	742	709	771	1%
Tabernacle Township	Burlington	693	726	721	739	753	9%
Buena Vista Township	Atlantic	930	777	573	643	673	-28%
Woodbine Borough	Cape May	517	529	565	628	628	22%
Beachwood Borough	Ocean	595	598	642	605	622	4%
Wrightstown Borough	Burlington	591	609	603	593	607	3%
South Toms River Borough	Ocean	427	465	478	460	478	12%
Medford Lakes Borough	Burlington	403	0	408	402	374	-7%
Maurice River Township	Cumberland	214	223	219	223	236	10%
Estell Manor City	Atlantic	129	134	126	122	183	42%
Washington Township	Burlington	49	52	56	54	158	221%
Weymouth Township	Atlantic	124	126	124	149	142	15%
Chesilhurst Borough	Camden	97	0	79	107	130	34%
Mullica Township	Atlantic	132	129	123	100	101	-23%
Port Republic City	Atlantic	70	25	27	26	31	-55%
Bass River Township	Burlington	0	0	0	0	0	No Data
Woodland Township	Burlington	282	250	239	182	0	No Data
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
Toms River Township	Ocean	31,324	31,885	32,334	32,761	32,721	4%
Vineland City	Cumberland	24,388	24,585	24,004	24,385	25,434	4%
Berlin Borough	Camden	4,124	4,211	4,185	4,169	4,173	1%
North Hanover Township	Burlington	353	354	371	468	571	62%
Springfield Township	Burlington	268	287	262	301	318	19%
Corbin City	Atlantic	41	46	45	42	40	-3%

Table E3b

Private Sector Establishments

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

Table E3c

Private Sector Average Annual Wages

Municipality	County	2012	2013	2014	2015	2016	5 Year Change
Folsom Borough	Atlantic	\$70,947	\$75,450	\$75,498	\$80,878	\$79,309	11.8%
Lakehurst Borough	Ocean	\$46,321	\$46,436	\$47,856	\$52,832	\$52,627	13.6%
Buena Borough	Atlantic	\$43,869	\$44,223	\$45,859	\$51,963	\$52,593	19.9%
Eagleswood Township	Ocean	\$64,298	\$58,072	\$49,139	\$51,093	\$52,195	-18.8%
Pemberton Township	Burlington	\$46,392	\$47,593	\$46,989	\$49,162	\$52,021	12.1%
Egg Harbor Township	Atlantic	\$45,555	\$46,567	\$48,685	\$50,304	\$51,582	13.2%
Evesham Township	Burlington	\$52,940	\$51,145	\$50,590	\$48,140	\$47,530	-10.2%
New Hanover Township	Burlington	\$39,920	\$43,628	\$45,013	\$46,226	\$46,734	17.1%
Woodland Township	Burlington	\$41,968	\$44,300	\$44,955	\$45,708	-	-
Lacey Township	Ocean	\$41,849	\$39,817	\$41,750	\$43,113	\$44,768	7.0%
Hammonton Town	Atlantic	\$37,433	\$38,385	\$41,339	\$42,873	\$42,735	14.2%
Shamong Township	Burlington	\$36,525	\$37,928	\$41,870	\$44,623	\$42,239	15.6%
Woodbine Borough	Cape May	\$38,273	\$38,594	\$38,007	\$42,205	\$42,103	10.0%
Washington Township	Burlington	\$50,524	\$44,153	\$47,281	\$64,693	\$42,008	-16.9%
Weymouth Township	Atlantic	\$44,768	\$39,992	\$31,384	\$37,656	\$41,640	-7.0%
Southampton Township	Burlington	\$36,236	\$36,902	\$37,679	\$39,241	\$41,368	14.2%
Galloway Township	Atlantic	\$40,639	\$42,126	\$42,627	\$41,634	\$41,236	1.5%
Wrightstown Borough	Burlington	\$31,604	\$32,602	\$35,104	\$37,783	\$40,160	27.1%
Medford Township	Burlington	\$37,055	\$37,459	\$37,749	\$39,304	\$39,577	6.8%
Berlin Township	Camden	\$37,743	\$38,083	\$38,398	\$38,886	\$39,559	4.8%
Dennis Township	Cape May	\$35,229	\$35,550	\$37,454	\$39,115	\$39,239	11.4%
Upper Township	Cape May	\$37,154	\$36,127	\$36,644	\$38,078	\$38,987	4.9%
Franklin Township	Gloucester	\$36,516	\$38,485	\$39,508	\$34,541	\$36,902	1.1%
Berkeley Township	Ocean	\$32,640	\$33,466	\$34,083	\$35,045	\$36,768	12.6%
Barnegat Township	Ocean	\$35,557	\$36,488	\$36,039	\$36,545	\$36,651	3.1%
Stafford Township	Ocean	\$34,077	\$37,303	\$34,686	\$35,599	\$35,989	5.6%
South Toms River Borough	Ocean	\$32,812	\$33,473	\$34,585	\$35,696	\$35,809	9.1%
Monroe Township	Gloucester	\$34,922	\$34,278	\$35,445	\$34,735	\$35,545	1.8%
Egg Harbor City	Atlantic	\$32,450	\$31,224	\$31,661	\$35,244	\$34,936	7.7%
Manchester Township	Ocean	\$32,808	\$32,841	\$33,044	\$34,951	\$34,797	6.1%
Tabernacle Township	Burlington	\$31,335	\$29,493	\$32,135	\$33,993	\$34,259	9.3%
Winslow Township	Camden	\$32,865	\$33,703	\$32,726	\$33,504	\$33,518	2.0%
Jackson Township	Ocean	\$28,442	\$30,236	\$30,928	\$32,213	\$32,721	15.0%
Buena Vista Township	Atlantic	\$42,119	\$38,219	\$31,281	\$30,973	\$32,078	-23.8%
Waterford Township	Camden	\$29,428	\$30,737	\$30,119	\$30,866	\$31,964	8.6%
Estell Manor City	Atlantic	\$34,917	\$31,909	\$31,815	\$34,859	\$31,604	-9.5%
Plumsted Township	Ocean	\$30,847	\$30,853	\$31,763	\$31,844	\$31,541	2.3%
Chesilhurst Borough	Camden	\$38,274	-	\$30,871	\$33,108	\$31,201	-18.5%
Maurice River Township	Cumberland	\$28,044	\$28,868	\$29,109	\$31,150	\$30,447	8.6%
Hamilton Township	Atlantic	\$28,600	\$28,165	\$28,340	\$29,438	\$30,064	5.1%
Little Egg Harbor Township	Ocean	\$28,756	\$29,608	\$28,806	\$29,273	\$29,964	4.2%
Ocean Township	Ocean	\$29,253	\$31,560	\$31,488	\$32,432	\$29,814	1.9%
Medford Lakes Borough	Burlington	\$52,056	-	\$47,636	\$51,731	\$28,183	-45.9%
Beachwood Borough	Ocean	\$33,141	\$28,769	\$26,923	\$28,484	\$27,967	-15.6%
Mullica Township	Atlantic	\$26,588	\$30,243	\$28,755	\$25,714	\$25,769	-3.1%
Port Republic City	Atlantic	\$19,300	\$24,993	\$23,625	\$29,783	\$25,709	33.2%
Bass River Township	Burlington	-	-	-	-	-	-
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>							
North Hanover Township	Burlington	\$43,057	\$44,018	\$50,767	\$51,738	\$47,199	9.6%
Berlin Borough	Camden	\$38,761	\$39,304	\$39,956	\$41,784	\$43,504	12.2%
Toms River Township	Ocean	\$39,224	\$39,477	\$39,951	\$41,305	\$42,283	7.8%
Vineland City	Cumberland	\$39,394	\$39,429	\$40,119	\$41,848	\$41,692	5.8%
Springfield Township	Burlington	\$61,572	\$49,134	\$39,592	\$36,506	\$40,358	-34.5%
Corbin City	Atlantic	\$18,271	\$18,080	\$16,561	\$17,487	\$19,594	7.2%

E4

Retail Sales, Establishments

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

Last updated for 2015 LTEM with 2012 data

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

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

Unit of Analysis: Retail sales data is obtained at three geographic scales: state, county, and economic place. According to the U.S. Census Bureau (2012), an economic place has a population of at least 2,500 and at least 2,500 jobs.¹⁵ 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 analyzed¹⁶. Sales data for the state and each county/place is analyzed on a per-capita basis. All dollar amounts have been adjusted for inflation to 2012 dollars.¹⁷

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

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

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

¹⁵ 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.

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

¹⁷ Dollar amounts are adjusted for inflation to 2012 dollars due to 2012 being the latest year of available data.

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

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

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

E5

Assessed Farmland Acreage

N.J. Department of the Treasury, Division of Taxation 2009 – 2016

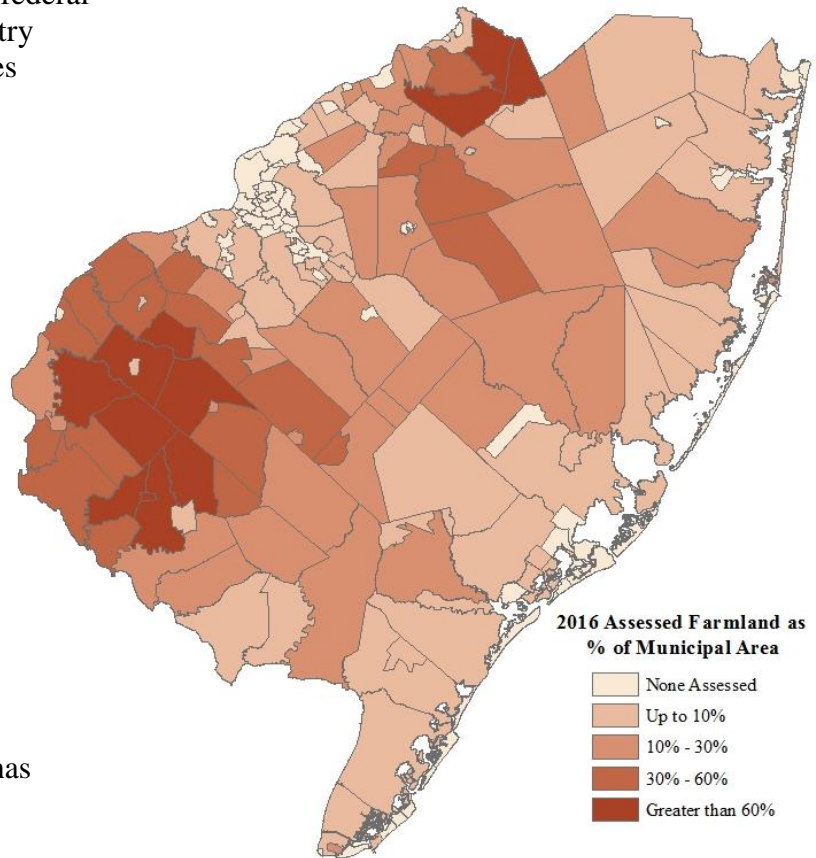
Updated for 2017LTEM with 2016 data

Acreage assessed as farmland has increased in Pinelands municipalities for the two years ending 2016. Farmland acreage grew by 11% in the Pinelands municipalities over the two-year period to a total of 189,288 acres.

Description: Agriculture is recognized in federal and state Pinelands legislation as an industry of special significance, therefore it receives detailed reporting in the next three variable sections. 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. Data is sourced from the New Jersey Division of Taxation which calculates farmland acreage directly from FA-1 tax forms.

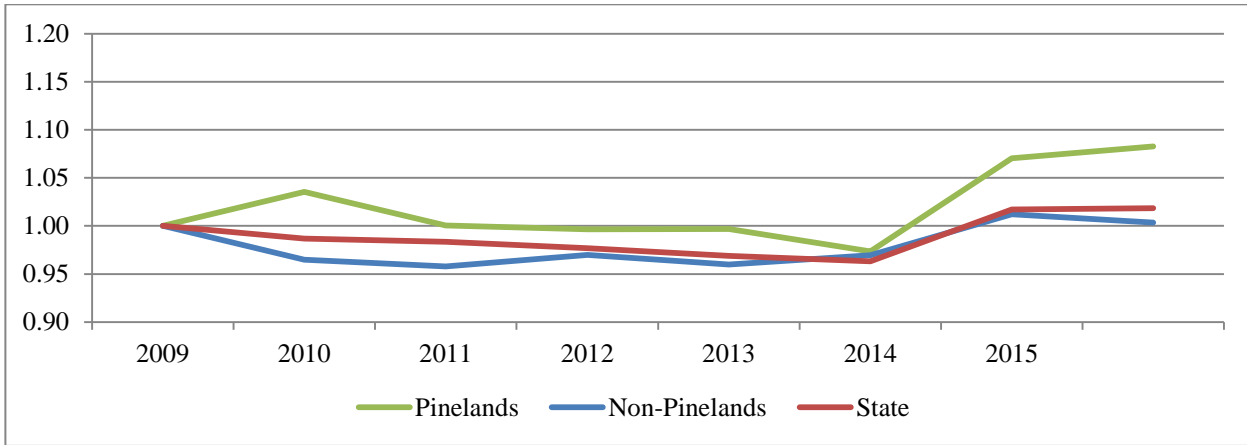
Unit of Analysis: Municipal-level data is regionally aggregated to allow for inside/outside the Pinelands and statewide analysis.

Findings: Acreage assessed as farmland has increased in the Pinelands by 1% between 2015 and 2016. In the Non-Pinelands municipalities, acreage increased in 2015 and then dropped back by about 2,500 acres in 2016. Statewide acreage increased in both 2015 and 2016 for a total acreage of 1,017,398 in 2016. The number of farming acres in the Pinelands municipalities sits at 189,288 acres. The Non-Pinelands municipalities overall acreage totals 297,187. There is no change in the pattern of farmland as a land use focusing in Cumberland, Salem and northern Burlington counties. Five-year trends are shown on Table E5.



Two graphs showing trends in assessed farmland acreage are shown below. An index graph compares annual total acreage assessed in each region (Pinelands, Non-Pinelands, and State) against the total acreage that was assessed in the base year of 2009. A second graph showing annual total acreage since 2009 presents a picture of relative stability in total acreage over the seven-year period.

Index of Assessed Farmland Acreage by Year



Tax Assessed Farmland Acreage by Year

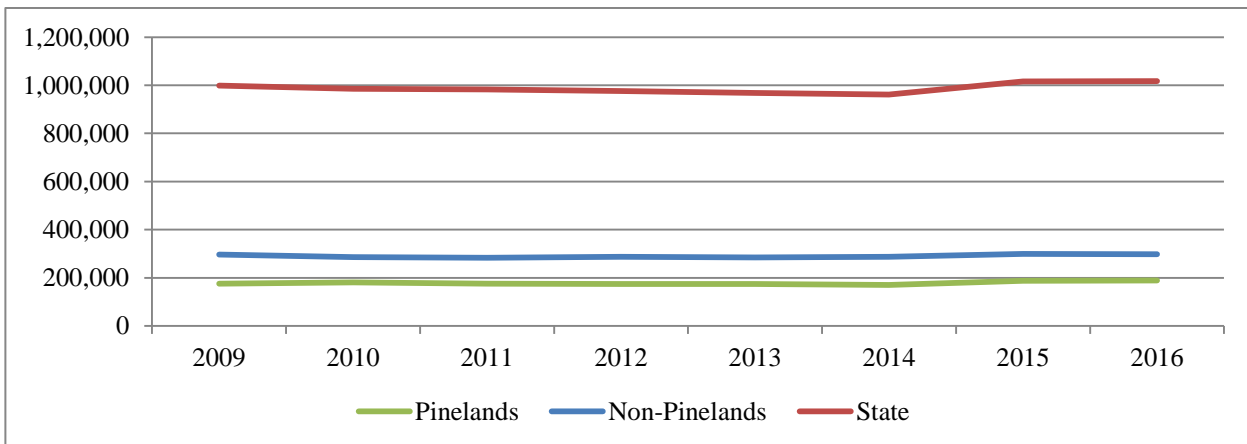


Table E5

Farmland Assessed Acreage

Municipality	County	2012	2013	2014	2015	2016	5 Year Change	5 Year % Change
Southampton Township	Burlington	12,654	12,492	14,621	15,079	14,263	1,609	13%
Franklin Township	Gloucester	8,676	12,826	13,080	14,123	14,215	5,539	64%
Woodland Township	Burlington	11,371	8,410	7,121	12,165	11,947	576	5%
Pemberton Township	Burlington	9,833	10,652	9,254	10,625	10,819	986	10%
Maurice River Township	Cumberland	9,736	9,550	9,955	11,086	10,739	1,003	10%
Tabernacle Township	Burlington	9,544	9,663	9,473	9,781	10,725	1,181	12%
Washington Township	Burlington	8,446	8,153	8,552	7,999	8,058	-388	-5%
Bass River Township	Burlington	6,878	6,959	6,909	7,041	7,069	191	3%
Hammonton Town	Atlantic	6,609	6,505	6,600	6,917	7,010	401	6%
Lacey Township	Ocean	6,295	6,320	6,304	6,575	6,523	228	4%
Mullica Township	Atlantic	6,416	6,221	6,175	6,411	6,470	54	1%
Winslow Township	Camden	6,776	6,853	5,446	6,511	6,444	-332	-5%
Monroe Township	Gloucester	5,348	4,845	5,014	5,664	6,061	713	13%
Hamilton Township	Atlantic	6,368	6,331	5,972	5,943	5,955	-413	-6%
Medford Township	Burlington	5,831	5,715	5,604	5,607	5,678	-153	-3%
Plumsted Township	Ocean	5,063	5,020	5,041	5,214	5,167	104	2%
Jackson Township	Ocean	4,259	4,124	3,771	4,585	4,952	693	16%
Shamong Township	Burlington	4,456	4,696	4,692	4,890	4,936	480	11%
Estell Manor City	Atlantic	9,647	9,700	4,642	4,650	4,655	-4,992	-52%
Manchester Township	Ocean	3,781	3,844	3,835	4,600	4,608	827	22%
Buena Vista Township	Atlantic	3,641	4,098	4,225	4,151	4,467	826	23%
Galloway Township	Atlantic	2,400	539	2,521	3,924	4,166	1,766	74%
Dennis Township	Cape May	3,834	4,244	4,084	4,649	4,033	199	5%
Egg Harbor Township	Atlantic	2,118	2,417	2,235	4,128	3,997	1,879	89%
Upper Township	Cape May	2,311	2,283	2,417	3,147	3,033	722	31%
Buena Borough	Atlantic	2,305	2,308	2,294	2,462	2,446	141	6%
Evesham Township	Burlington	1,354	1,326	2,240	1,355	2,277	923	68%
Waterford Township	Camden	2,565	2,541	2,253	2,463	2,089	-476	-19%
Ocean Township	Ocean	1,892	1,915	1,915	1,935	2,006	114	6%
New Hanover Township	Burlington	892	932	956	970	908	16	2%
Folsom Borough	Atlantic	721	674	662	691	731	10	1%
Barnegat Township	Ocean	192	220	229	432	633	441	230%
Little Egg Harbor Township	Ocean	543	543	538	285	598	55	10%
Stafford Township	Ocean	450	465	461	37	547	97	22%
Woodbine Borough	Cape May	331	319	318	357	374	43	13%
Eagleswood Township	Ocean	287	258	359	362	264	-23	-8%
Berlin Township	Camden	157	50	157	26	157	0	0%
Berkeley Township	Ocean	88	88	88	89	87	-1	-1%
Weymouth Township	Atlantic	15	15	23	20	86	71	473%
Port Republic City	Atlantic	147	136	136	169	72	-75	-51%
Wrightstown Borough	Burlington	24	24	24	23	23	-1	-4%
Egg Harbor City	Atlantic	0	0	0	0	0	0	0%
Medford Lakes Borough	Burlington	0	0	0	0	0	0	0%
Chesilhurst Borough	Camden	0	0	0	0	0	0	0%
Beachwood Borough	Ocean	0	0	0	0	0	0	0%
Lakehurst Borough	Ocean	0	0	0	0	0	0	0%
South Toms River Borough	Ocean	0	0	0	0	0	0	0%
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>								
Springfield Township	Burlington	11,778	11,735	12,105	12,699	12,855	1,077	9%
Vineland City	Cumberland	8,727	9,296	9,545	10,155	10,454	1,727	20%
North Hanover Township	Burlington	7,234	7,181	7,034	7,111	7,082	-152	-2%
Toms River Township	Ocean	297	307	320	319	311	14	5%
Corbin City	Atlantic	161	178	177	120	182	21	13%
Berlin Borough	Camden	93	93	64	65	87	-6	-6%

E6

Cranberry & Blueberry Production

U.S.D.A. National Ag. Statistics Service/N.J. Ag. Statistics Service 1980 - 2016

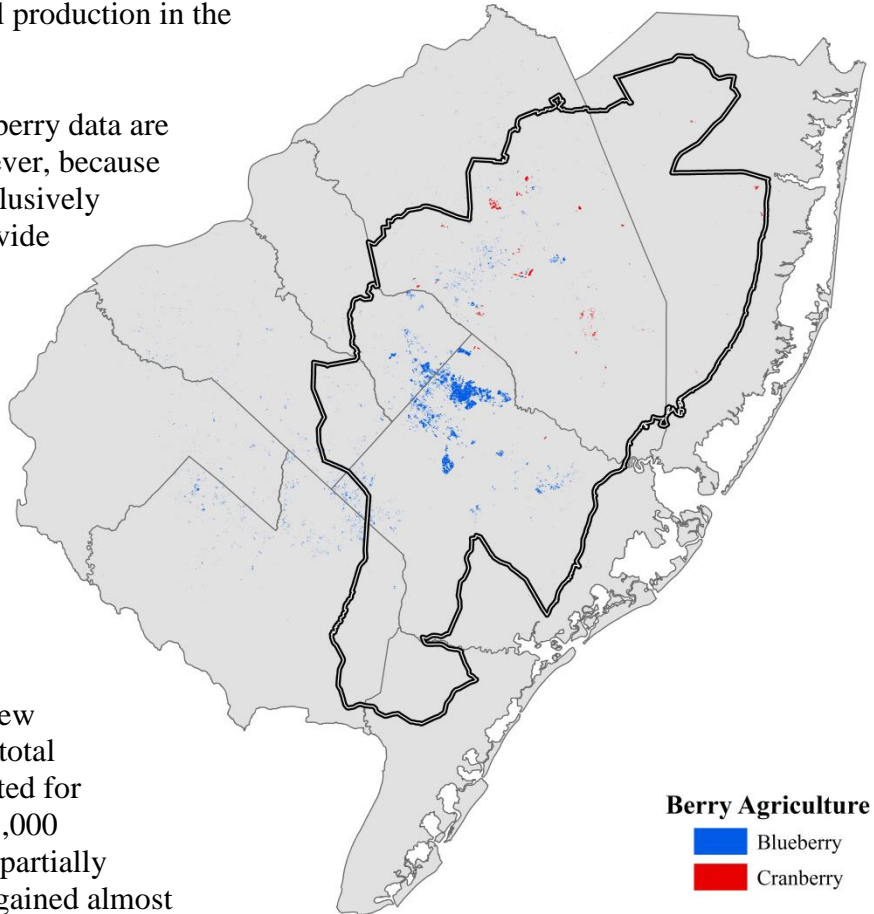
Updated for 2017 LTEM with 2016 data

Cranberry prices rose by 30% in 2016 to end at 43¢ per pound, which is up from 37¢ the previous year. Blueberry prices dropped slightly less than 20%, from \$1.39 per pound to \$1.35 per pound.

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

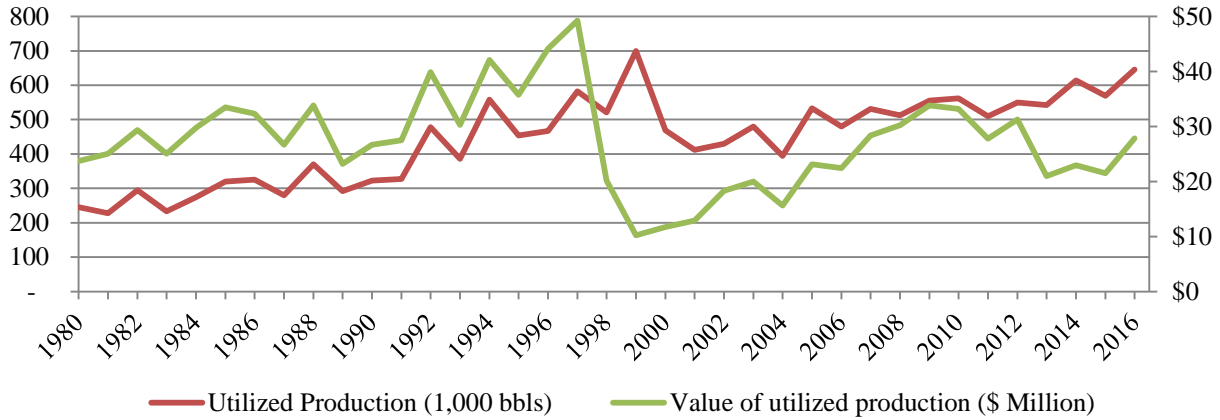
Unit of Analysis: Cranberry and blueberry data are only available at the state level. However, because these two staples are found almost exclusively in the Pinelands, statewide figures provide sufficient information for the purposes of this analysis. Unless otherwise noted, the dollar amounts below are adjusted for inflation to 2016 dollars.

Findings: In 2016, the used portion of the cranberry crop increased by 14% since 2015 (about 5% over utilized production in 2014.) Cranberry prices per pound also rose by 14% from prices in 2015. Total utilized production of cranberries in New Jersey climbed to 646,000 barrels at a total value of \$27,835,000. The area harvested for cranberries is staying steady at about 3,000 acres, so increase in used harvest may partially reflect increased yield. Yield per acre gained almost 10% over 2015 production. New Jersey production ranked third among the states in total cranberry production.

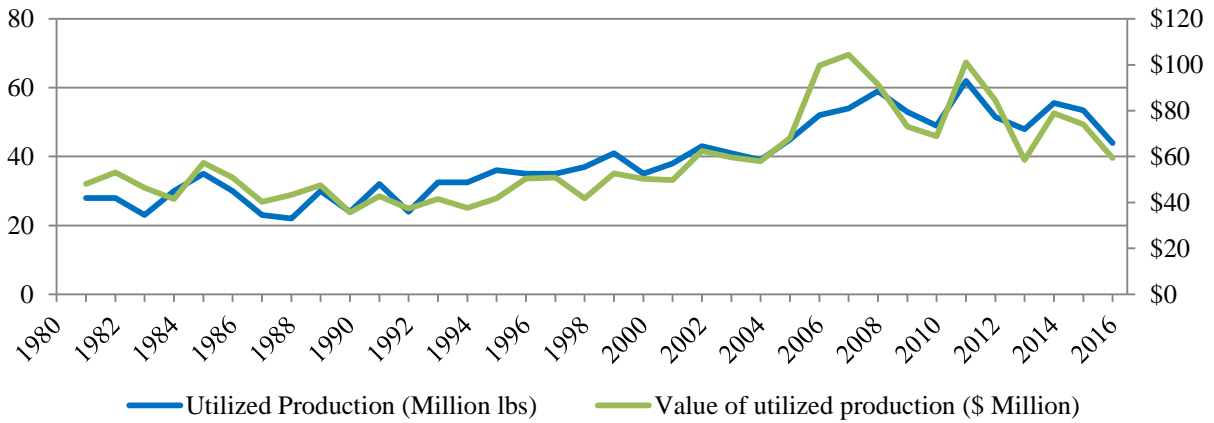


For blueberries, the used portion of the harvest has decreased by about 18% since 2015 and by almost 21% since 2014. The decrease in production was coupled with a 2% decrease in prices from 2014 to 2015 and another 3% decrease in prices for 2016. Blueberry prices went from \$1.40 per pound in 2014 to \$1.37 per pound in 2015 and ended at \$1.35 per pound in 2016. Overall value of the crop used in 2016 dropped to \$59,390,000. For 2016, the 9,300 acres harvested for blueberries was equal to the acreage harvested in 2014, but was down compared to 2015 when 10,000 acres were harvested. New Jersey blueberries yielded a total of 44,120 pounds, which ranked seventh in blueberry production among the states.

New Jersey Cranberry Production, Value and Volume



New Jersey Blueberry Production, Value and Volume



Cranberry and Blueberry Prices

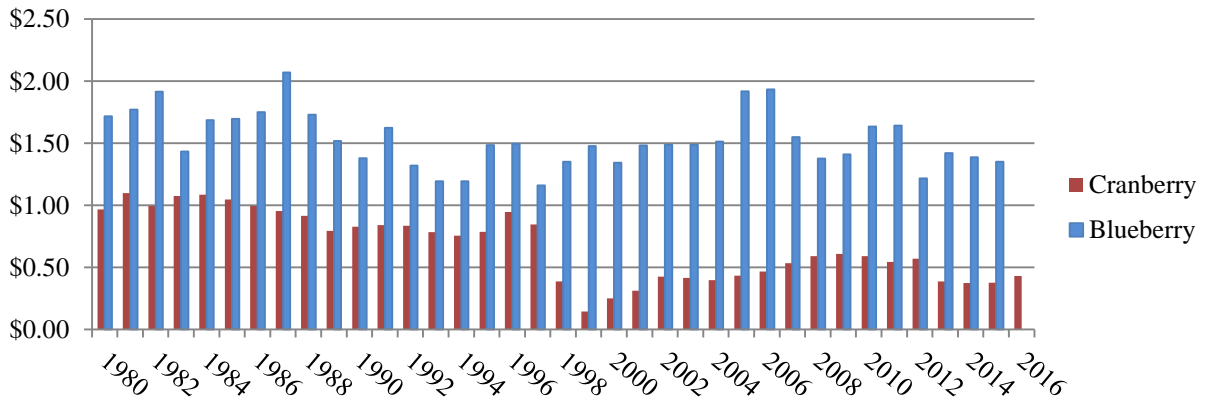


Table E6

Sales of New Jersey Cranberries and Blueberries

Year	Cranberry		Blueberry	
	Value of Production	Annual % Change	Value of Production	Annual % Change
1980	\$23,691,953	-	-	-
1981	\$25,043,635	6%	\$48,056,847	-
1982	\$29,348,006	17%	\$53,124,865	11%
1983	\$25,041,694	-15%	\$46,410,992	-13%
1984	\$29,747,932	19%	\$41,533,454	-11%
1985	\$33,476,069	13%	\$57,298,325	38%
1986	\$32,311,161	-3%	\$50,839,439	-11%
1987	\$26,679,651	-17%	\$40,253,991	-21%
1988	\$33,854,580	27%	\$43,314,873	8%
1989	\$23,172,289	-32%	\$47,536,870	10%
1990	\$26,690,909	15%	\$35,698,057	-25%
1991	\$27,486,264	3%	\$42,706,091	20%
1992	\$39,903,088	45%	\$37,326,819	-13%
1993	\$30,260,813	-24%	\$41,532,007	11%
1994	\$42,111,350	39%	\$37,580,043	-10%
1995	\$35,749,074	-15%	\$41,733,501	11%
1996	\$44,148,133	23%	\$50,494,781	21%
1997	\$49,259,007	12%	\$50,812,697	1%
1998	\$20,175,312	-59%	\$41,758,273	-18%
1999	\$10,185,171	-50%	\$52,712,222	26%
2000	\$11,700,690	15%	\$50,315,056	-5%
2001	\$12,897,496	10%	\$49,776,720	-1%
2002	\$18,300,033	42%	\$62,423,166	25%
2003	\$19,972,756	9%	\$59,597,390	-5%
2004	\$15,618,878	-22%	\$57,975,222	-3%
2005	\$23,122,026	48%	\$68,167,887	18%
2006	\$22,400,653	-3%	\$99,669,574	46%
2007	\$28,335,462	26%	\$104,456,558	5%
2008	\$30,249,602	7%	\$91,397,584	-13%
2009	\$33,839,066	12%	\$73,007,718	-20%
2010	\$33,217,023	-2%	\$68,802,682	-6%
2011	\$27,752,333	-16%	\$101,043,674	47%
2012	\$31,276,991	13%	\$84,469,828	-16%
2013	\$20,951,430	-33%	\$58,518,944	-31%
2014	\$22,970,054	10%	\$78,867,872	35%
2015	\$21,491,743	-6%	\$73,939,131	-6%
2016	\$27,835,000	30%	\$59,390,000	-19%



Census of Agriculture

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

Last Updated for 2014 LTEM with 2012 data

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

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

Unit of Analysis: Census of Agriculture data is limited to the county level and, consequently, inside/outside the Pinelands trends cannot be distinguished. Additionally, due to compatibility issues, data is limited to the years 1997, 2002, 2007, and 2012.¹⁸

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

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

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

Among the individual counties, Ocean County lost 30% of its farms from 2007 to 2012 (down 77) while Cape May lost almost a quarter (a decline of 49). All of the Pinelands counties saw an increase in the average size of their farms with the exception of Cumberland, which saw a decrease from 113 acres in

¹⁸ 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.

2007 to 111 acres in 2012 (down 2%). Ocean County saw the greatest increase in net cash income per farm (up 140% from 2007) while Cape May saw the greatest decline (down 64% from 2007).

Table E7a **Agricultural Lands**

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

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

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

Table E7b

Agricultural Sales

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

Table E7c

Net Cash Income for New Jersey Farms

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

Table E7d

Net Cash Income per Farm

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

Table E7e

Farms with Net Income Losses

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

Municipal Finance

Municipal Finance

F1

Average Residential Property Tax Bill

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

Updated for 2017 LTEM with 2016 data

Average residential property tax bills increased across the state, and the Pinelands municipalities had the greatest increase over the two-year period, 2014 – 2016. Pinelands municipalities had an average increase: less than half of a percent. The Non-Pinelands saw bills increase by 1% while the state as a whole saw an increase of half of a percent.

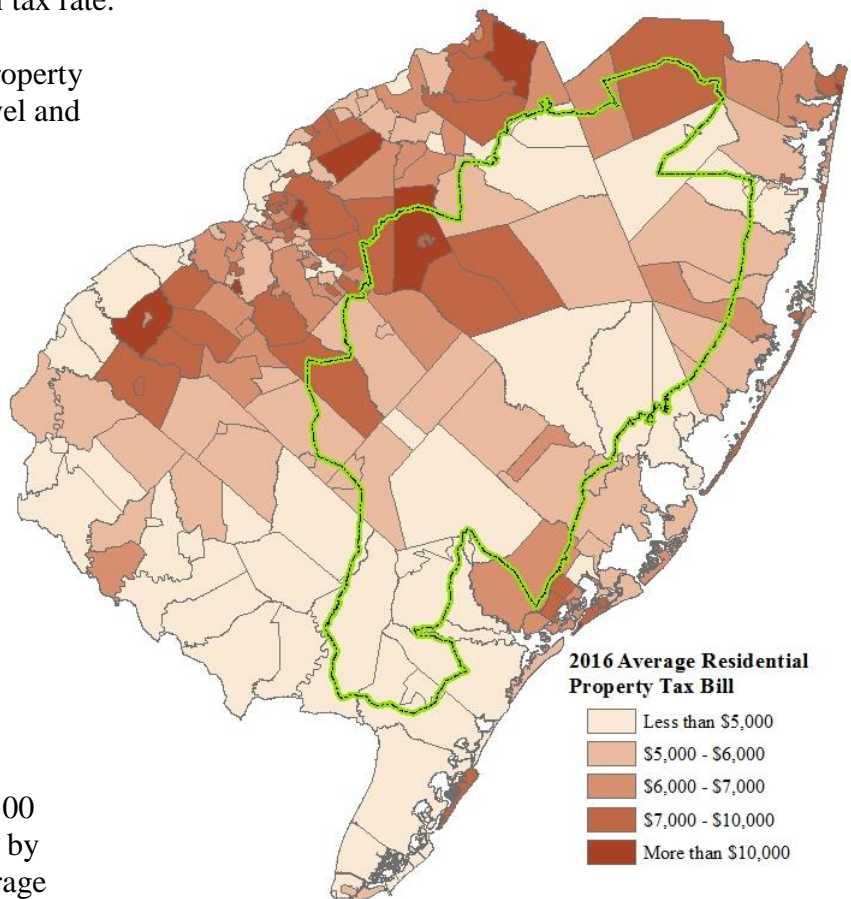
Description: The average residential property tax bill measures the impact of property taxes on municipal residents. It is calculated by dividing the average residential property value by 100 and multiplying the result by the general tax rate.

Unit of Analysis: Average residential property tax data is compiled at the municipal level and regionally aggregated to allow for inside/outside the Pinelands and state analysis. Unless otherwise noted, all dollar amounts are adjusted for inflation to 2016 dollars.

Findings:

Regional-level data:

The average residential tax bill has steadily increased across the state from the late 1990s until 2007. From 2007 to 2014, average residential tax held mostly steady or declined slightly. Starting in 2014, the average residential tax bill resumed a steady increase. In 2010, the average residential property tax bill in the Pinelands municipalities had risen to about \$5,200. They rose by \$6,100 in the Non-Pinelands municipalities and by \$8,300 in the state overall. In 2012, average residential property tax bills had dropped back to \$5,100 in the Pinelands and to \$8,200 in the state. These slight declines were temporary as tax bills started to increase again in 2014. From the late 1990s until 2016, average residential tax bills have risen by 40%.



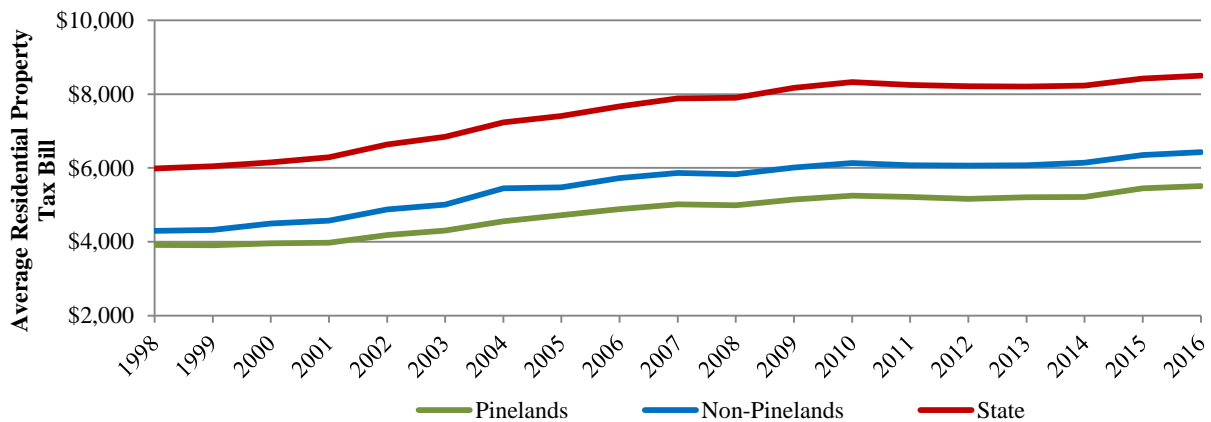
With the renewed upward trend in average residential taxes across the state, averages for 2016 are the highest since 1998. In Pinelands municipalities, the average residential tax bill was \$5,509 (up more than 6% since 2014). In the Non-Pinelands municipalities, the average municipal tax bill was \$6,429 (up almost 5% from 2014). Statewide, the average residential tax bill in 2016 was \$8,501 (up 3% from 2014.) The greater increase occurred from 2014 to 2015. The average increase from 2015 to 2016 was about 1% in the Pinelands and across the State.

Individual Municipalities:

Of the Pinelands municipalities, Medford Township continued to have the highest average tax bill in 2016 at \$10,127. However, the largest absolute increase from 2014 to 2016 (up \$706) occurred in Woodland Township. New Hanover Township delivered the greatest percentage increase of 17% over the two-year period. This change resulted in its rank among south Jersey municipalities' tax bill changing from 186 (of 202) up to 168. Woodland Township and Washington Township also tallied higher average residential taxes (up \$706 and \$501, respectively.) Those increases caused rank jumps from 142 to 115 for Woodland Township and from 190 to 179 for Washington Township. Almost all of the municipalities saw an increase in the average residential tax bill. The average increase was 5% between 2014 and 2016. See Table F1 for more detail on average tax bills for Pinelands municipalities.

Several municipalities carried decreases in the residential tax bill by an average of 4% since 2014. The greatest percentage decrease occurred in Dennis Township (down 5% from 2014). Woodbine Borough continued to have the lowest average tax bill in 2016 at \$1,783.

Average Residential Property Tax Bill



Index of Average Residential Property Tax Bill

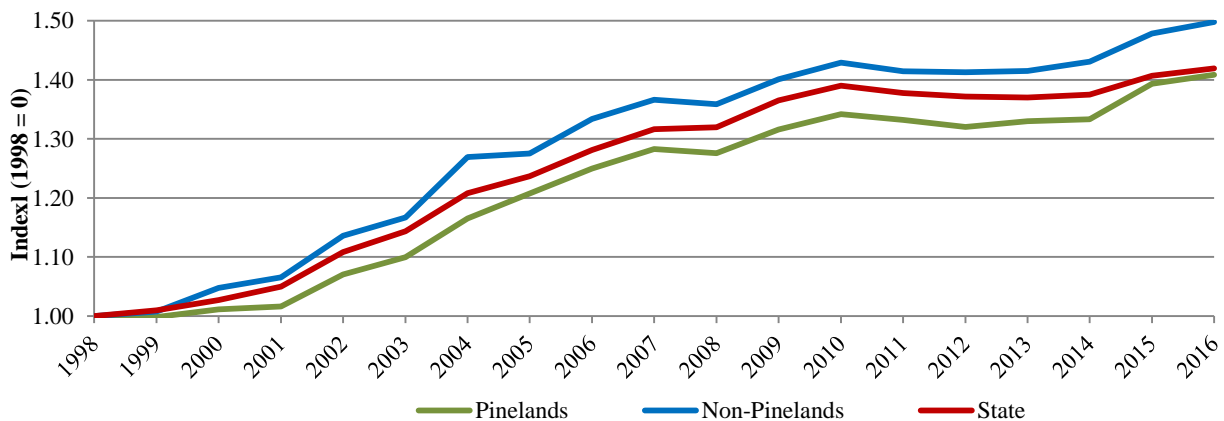


Table F1

Average Residential Property Tax Bill¹⁹

Municipality	County	2014 Average Tax Bill	2015 Average Tax Bill	2016 Average Tax Bill	Actual Change 2014- 2016	Percent Change 2014-2016	2014 South N.J. Rank	2016 South N.J. Rank
Medford Township	Burlington	\$9,863	\$10,112	\$10,127	\$264	3%	9	10
Medford Lakes Borough	Burlington	\$8,489	\$8,678	\$8,614	\$125	1%	18	21
Shamong Township	Burlington	\$7,830	\$8,338	\$8,430	\$600	8%	25	22
Tabernacle Township	Burlington	\$6,896	\$7,370	\$7,334	\$438	6%	52	43
Evesham Township	Burlington	\$6,917	\$7,125	\$7,153	\$236	3%	48	46
Jackson Township	Ocean	\$6,899	\$7,093	\$7,139	\$241	3%	51	50
Monroe Township	Gloucester	\$6,701	\$6,896	\$7,011	\$311	5%	56	53
Waterford Township	Camden	\$6,489	\$6,630	\$6,707	\$218	3%	63	64
Plumsted Township	Ocean	\$6,210	\$6,360	\$6,471	\$261	4%	76	73
Egg Harbor City	Atlantic	\$5,975	\$6,056	\$6,275	\$300	5%	83	79
Egg Harbor Township	Atlantic	\$6,127	\$6,244	\$6,261	\$134	2%	77	81
Barneget Township	Ocean	\$5,968	\$6,118	\$6,248	\$280	5%	84	82
Berlin Township	Camden	\$6,001	\$6,151	\$6,123	\$122	2%	81	86
Stafford Township	Ocean	\$5,594	\$5,753	\$5,986	\$392	7%	95	91
Eagleswood Township	Ocean	\$5,717	\$5,871	\$5,968	\$251	4%	92	93
Franklin Township	Gloucester	\$5,555	\$5,777	\$5,952	\$397	7%	100	95
Port Republic City	Atlantic	\$5,720	\$5,888	\$5,857	\$137	2%	90	102
Winslow Township	Camden	\$5,623	\$5,745	\$5,764	\$141	3%	94	103
Lacey Township	Ocean	\$5,405	\$5,399	\$5,592	\$187	3%	109	108
Hammonton Town	Atlantic	\$5,140	\$5,386	\$5,492	\$352	7%	119	112
Woodland Township	Burlington	\$4,761	\$5,299	\$5,466	\$706	15%	142	115
Southampton Township	Burlington	\$5,001	\$5,182	\$5,283	\$283	6%	128	124
Chesilhurst Borough	Camden	\$5,042	\$5,282	\$5,279	\$238	5%	126	125
Mullica Township	Atlantic	\$4,888	\$4,935	\$5,132	\$245	5%	135	130
Galloway Township	Atlantic	\$4,991	\$5,157	\$5,114	\$123	2%	129	131
Buena Vista Township	Atlantic	\$5,068	\$5,073	\$5,098	\$30	1%	122	132
Ocean Township	Ocean	\$4,906	\$4,982	\$5,089	\$183	4%	134	133
Buena Borough	Atlantic	\$4,865	\$4,940	\$5,035	\$170	3%	138	138
Lakehurst Borough	Ocean	\$4,698	\$4,872	\$4,876	\$178	4%	148	147
Bass River Township	Burlington	\$4,575	\$4,944	\$4,829	\$255	6%	155	150
Hamilton Township	Atlantic	\$4,728	\$4,687	\$4,800	\$72	2%	145	151
Beachwood Borough	Ocean	\$4,631	\$4,735	\$4,736	\$105	2%	153	154
Upper Township	Cape May	\$4,663	\$4,639	\$4,713	\$50	1%	150	155
South Toms River Borough	Ocean	\$4,433	\$4,547	\$4,603	\$170	4%	160	160
Weymouth Township	Atlantic	\$4,460	\$4,411	\$4,567	\$107	2%	159	162
Little Egg Harbor Township	Ocean	\$4,581	\$4,598	\$4,546	-\$35	-1%	154	165
New Hanover Township	Burlington	\$3,760	\$4,396	\$4,413	\$653	17%	186	168
Maurice River Township	Cumberland	\$4,330	\$4,421	\$4,405	\$75	2%	165	169
Estell Manor City	Atlantic	\$4,178	\$4,302	\$4,309	\$131	3%	172	172
Berkeley Township	Ocean	\$3,934	\$4,041	\$4,120	\$186	5%	179	177
Washington Township	Burlington	\$3,592	\$3,931	\$4,093	\$501	14%	190	179
Manchester Township	Ocean	\$3,865	\$3,957	\$4,000	\$134	3%	181	182
Wrightstown Borough	Burlington	\$4,207	\$3,904	\$3,934	-\$273	-6%	171	185
Folsom Borough	Atlantic	\$3,718	\$3,709	\$3,769	\$51	1%	187	189
Pemberton Township	Burlington	\$3,484	\$3,641	\$3,627	\$143	4%	192	192
Dennis Township	Cape May	\$2,946	\$2,828	\$2,833	-\$112	-4%	196	197
Woodbine Borough	Cape May	\$1,696	\$1,712	\$1,783	\$87	5%	201	201
<i>"Outside" Municipalities (less than 10% of total area inside Pinelands boundary)</i>								
Springfield Township	Burlington	\$7,537	\$7,940	\$8,123	\$586	8%	28	31
Berlin Borough	Camden	\$6,978	\$7,111	\$7,152	\$174	3%	47	45
North Hanover Township	Burlington	\$6,283	\$6,593	\$6,524	\$241	4%	71	71
Toms River Township	Ocean	\$5,371	\$5,691	\$5,918	\$547	10%	99	112
Vineland City	Cumberland	\$3,784	\$3,995	\$4,102	\$318	8%	178	185
Corbin City	Atlantic	\$3,431	\$3,512	\$3,450	\$19	1%	193	193

¹⁹ Rankings are out of the 202 municipalities in southern New Jersey; Rankings are ordered in descending order from highest 2016 average residential property tax bill (1) to lowest 2016 average residential property tax bill (202).

F2

State Equalized Valuation

N.J. Department of Community Affairs

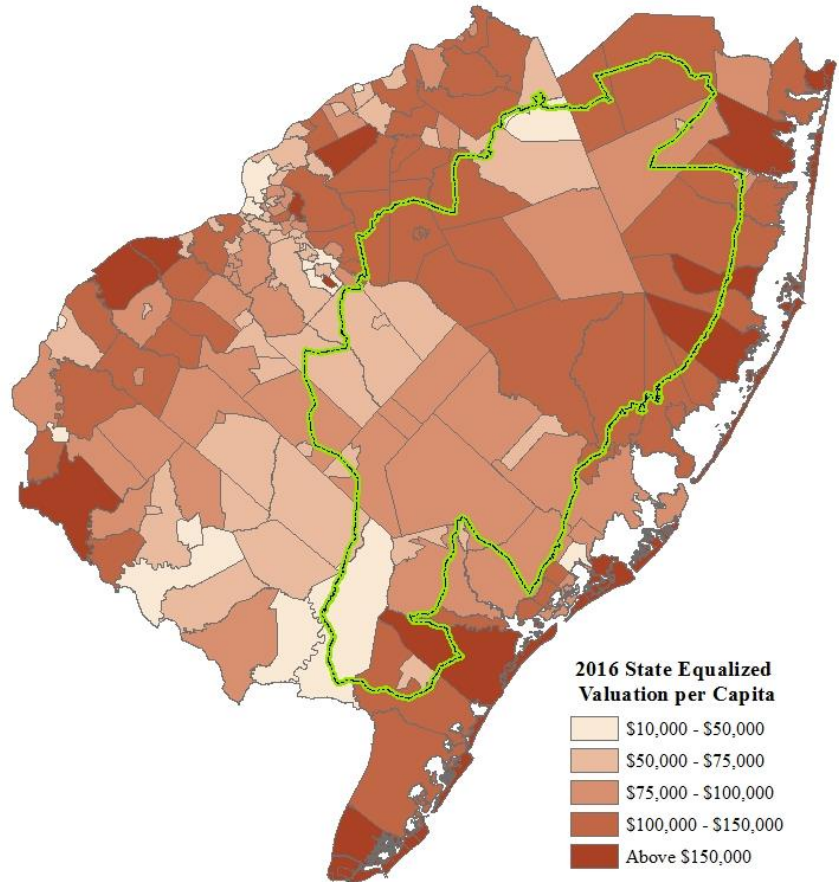
Updated for 2017 LTEM Report with 2016 data

The state equalized valuations have remained stable since 2014. The average valuations in the Pinelands barely moved higher, less than 0.1%. The state's valuation increased by 2% over the two-year period.

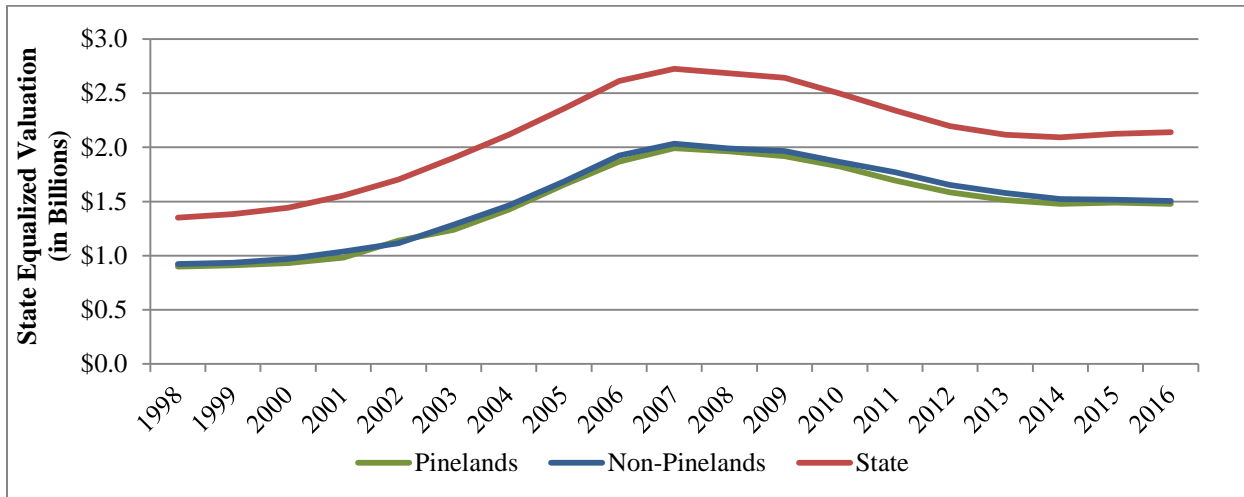
Description: Equalized property value is the total assessed value of all property in a municipality adjusted for different municipal assessment biases in order to make values across New Jersey municipalities comparable to one another. It is useful as a measurement of the wealth of one municipality relative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

Unit of Analysis: State equalized valuation data are compiled at the municipal level and regionally aggregated to allow for inside/outside the Pinelands and state analysis. Unless otherwise noted, all dollar amounts are adjusted for inflation to 2016 dollars.

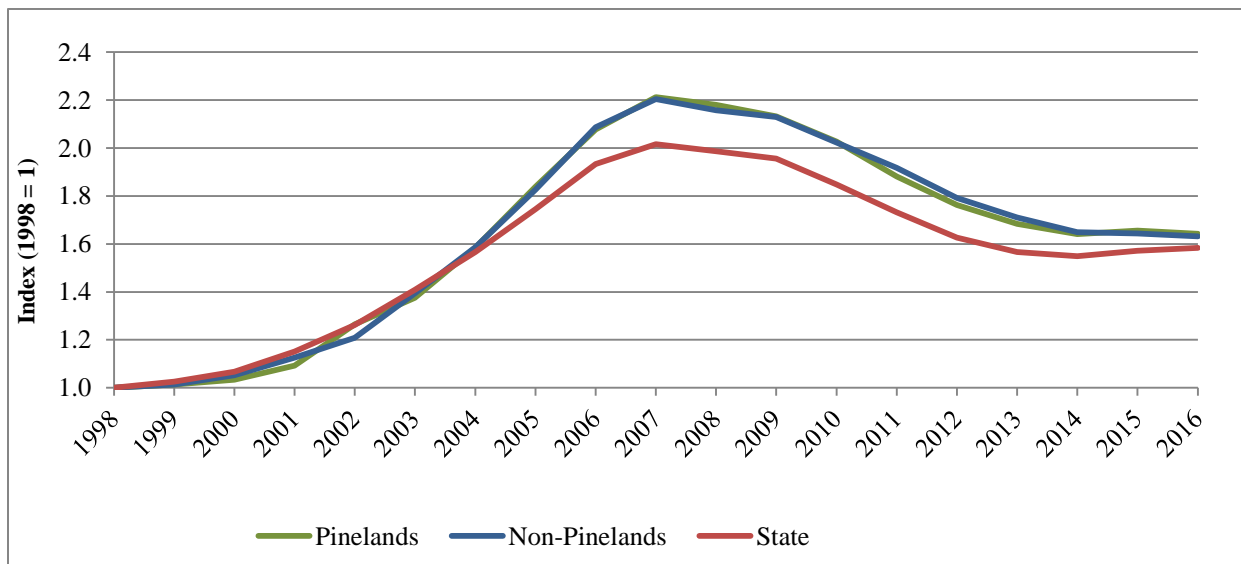
Findings: Trends in state equalized valuation continue to mirror each other from region to region. The State, as a whole, the northern half and the Pinelands all showed slight increases (2%, 3%, and 0.08%, respectively.) The non-Pinelands region exhibited a slight reduction in valuation of approximately 1%. The increased average state equalized valuation in the Pinelands brought the regional municipal average to about \$1.48 billion after having declined from the 2013 valuation. In the Non-Pinelands, the average fell by 1% to slightly more than \$1.50 billion and the state rose to about \$2.14 billion. The northern half of the state led the rate of increase in average equalized valuation, bringing that regional average to \$2.5 billion.



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 \$6.9 billion tops all others. Berkeley Township and Evesham Township also retain high values, each over \$5 billion. At the bottom end, Wrightstown Borough had the lowest state equalized valuation at \$37.5 million. Chesilhurst Borough, New Hanover Township, and Washington Township are the only other Pinelands municipalities with valuations of less than \$100 million. Of the six municipalities with some land, but less than 10%, in the Pinelands Area, Toms River Township’s valuation is the highest at just over \$15 billion in 2016.

In the Pinelands region, very little change in average valuation was seen between 2014 and 2016. Thirty of the 53 municipalities with any amount of land in the Pinelands Area had increases in state equalized valuation in 2016. Weymouth Township and Egg Harbor City displayed the largest gains of 14% and 11%, respectively. For the 30 municipalities with increased valuation, the average increase was 4%. In the remaining 23 municipalities with any land in the Pinelands Area, the average decrease was about 3%.

Table F2

State Equalized Valuation

Municipality	County	2016 Population Estimate	2015 State Equalized Valuation	2016 State Equalized Valuation	2016 Equalized Valuation per Capita
Jackson Township	Ocean	56733	\$6,691,228,327	\$6,948,799,597	\$122,482
Berkeley Township	Ocean	41689	\$5,145,736,768	\$5,286,358,469	\$126,805
Evesham Township	Burlington	45351	\$5,218,087,643	\$5,243,965,949	\$115,631
Stafford Township	Ocean	27153	\$4,057,256,682	\$4,180,155,817	\$153,948
Egg Harbor Township	Atlantic	43504	\$4,173,764,100	\$4,104,616,654	\$94,350
Manchester Township	Ocean	43546	\$3,710,002,911	\$3,793,121,953	\$87,106
Lacey Township	Ocean	28569	\$3,831,083,359	\$3,742,000,493	\$130,981
Medford Township	Burlington	23440	\$3,262,317,610	\$3,276,195,987	\$139,769
Galloway Township	Atlantic	36753	\$2,927,947,523	\$2,770,557,757	\$75,383
Monroe Township	Gloucester	36908	\$2,609,444,955	\$2,630,673,471	\$71,277
Winslow Township	Camden	39328	\$2,646,364,642	\$2,617,852,412	\$66,565
Little Egg Harbor Township	Ocean	20818	\$2,274,331,365	\$2,286,645,734	\$109,840
Barnegat Township	Ocean	22288	\$2,220,474,015	\$2,253,217,077	\$101,096
Hamilton Township	Atlantic	26499	\$2,249,817,012	\$2,145,057,650	\$80,949
Upper Township	Cape May	11976	\$1,934,627,003	\$1,902,707,738	\$158,877
Pemberton Township	Burlington	27567	\$1,453,885,421	\$1,447,828,806	\$52,520
Ocean Township	Ocean	9013	\$1,356,366,366	\$1,379,717,742	\$153,081
Hammonton Town	Atlantic	14428	\$1,339,593,769	\$1,351,724,801	\$93,688
Franklin Township	Gloucester	16568	\$1,293,215,305	\$1,299,086,870	\$78,409
Southampton Township	Burlington	10235	\$1,086,094,552	\$1,104,573,064	\$107,921
Dennis Township	Cape May	6285	\$877,388,940	\$887,340,914	\$141,184
Beachwood Borough	Ocean	11196	\$872,536,212	\$869,631,232	\$77,673
Plumsted Township	Ocean	8530	\$859,423,102	\$853,005,562	\$100,001
Waterford Township	Camden	10754	\$756,531,846	\$747,933,144	\$69,549
Tabernacle Township	Burlington	6892	\$697,035,880	\$713,352,031	\$103,504
Shamong Township	Burlington	6453	\$696,545,991	\$700,932,934	\$108,621
Buena Vista Township	Atlantic	7461	\$612,041,904	\$590,938,462	\$79,204
Berlin Township	Camden	5513	\$542,659,029	\$570,463,307	\$103,476
Mullica Township	Atlantic	6041	\$507,403,762	\$481,426,405	\$79,693
Medford Lakes Borough	Burlington	4053	\$450,237,504	\$453,868,893	\$111,983
Maurice River Township	Cumberland	6562	\$294,950,166	\$294,838,090	\$44,931
Buena Borough	Atlantic	4456	\$264,312,487	\$272,731,990	\$61,206
Egg Harbor City	Atlantic	4193	\$233,511,153	\$233,744,048	\$55,746
Eagleswood Township	Ocean	1604	\$241,946,058	\$231,759,544	\$144,488
South Toms River Borough	Ocean	3761	\$222,350,309	\$221,944,624	\$59,012
Weymouth Township	Atlantic	2788	\$177,676,512	\$183,634,307	\$65,866
Bass River Township	Burlington	1443	\$176,538,091	\$174,980,076	\$121,261
Folsom Borough	Atlantic	1824	\$167,744,572	\$172,782,614	\$94,727
Estell Manor City	Atlantic	1718	\$167,012,107	\$160,421,553	\$93,377
Lakehurst Borough	Ocean	2692	\$160,482,784	\$158,666,014	\$58,940
Woodbine Borough	Cape May	2494	\$152,953,523	\$158,490,254	\$63,549
Woodland Township	Burlington	1778	\$144,002,937	\$151,401,372	\$85,153
Port Republic City	Atlantic	1085	\$130,689,036	\$123,427,804	\$113,758
Washington Township	Burlington	695	\$92,213,311	\$89,348,922	\$128,560
New Hanover Township	Burlington	8129	\$81,979,068	\$86,239,263	\$10,609
Chesilhurst Borough	Camden	1636	\$84,509,359	\$85,086,301	\$52,009
Wrightstown Borough	Burlington	787	\$34,418,286	\$37,523,500	\$47,679
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>					
Toms River Township	Ocean	91837	\$14,460,430,346	\$15,167,528,438	\$165,157
Vineland City	Cumberland	60525	\$4,176,171,096	\$4,095,438,711	\$67,665
Berlin Borough	Camden	7594	\$729,557,649	\$735,922,471	\$96,908
North Hanover Township	Burlington	7581	\$416,826,073	\$420,568,891	\$55,477
Springfield Township	Burlington	3315	\$402,152,675	\$419,578,570	\$126,570
Corbin City	Atlantic	499	\$50,450,752	\$53,090,194	\$106,393

F3

Effective Tax Rate

N.J. Department of Community Affairs

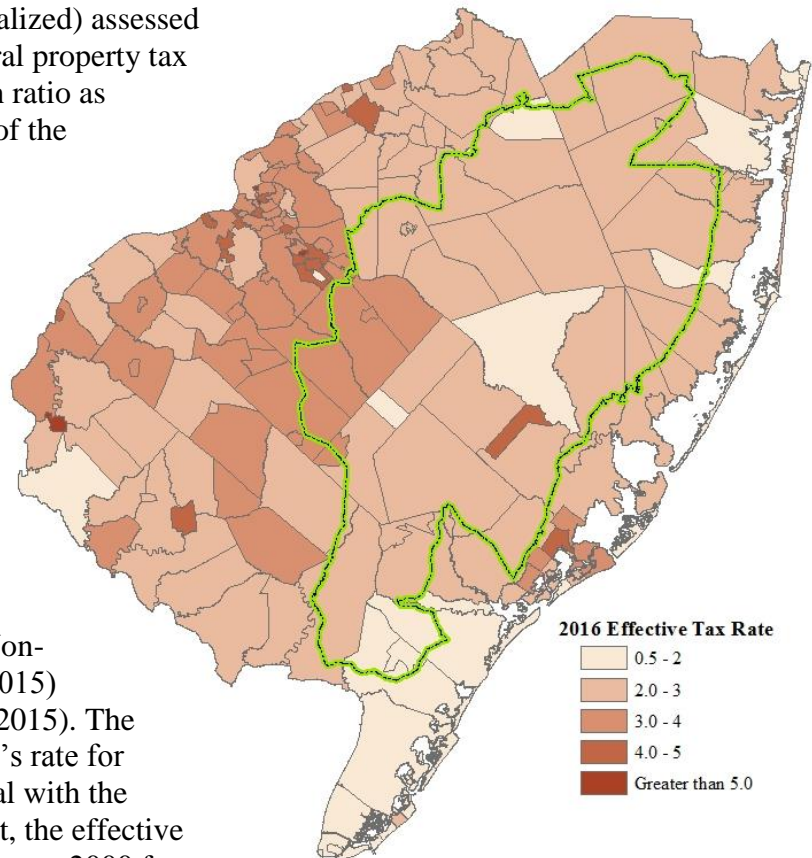
Updated for 2017 LTEM Report with 2016 data

The average municipal effective tax rate continued to climb across the state in 2016. The average effective tax rate in the Pinelands and Non-Pinelands areas rose by 2% while the state rose by 1%. Average municipal effective tax rates in the Pinelands (2.53) remained lower than the rest of the state.

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

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

Findings: In 2016, average municipal effective tax rates in the Pinelands increased by slightly more than 2% over the 2015 average, bringing the new rate to 2.53. The average effective tax rate in the Pinelands continues to be lower than the Non-Pinelands’ rate of 2.84 (also up 2% from 2015) and the state’s rate of 2.63 (up 1.5% from 2015). The increase in the Pinelands rate and the State’s rate for 2016 brings those rates back to nearly equal with the effective rates in the year 2000. In contrast, the effective rate in 2016 is about 7% higher than in the year 2000 for the non-Pinelands areas.

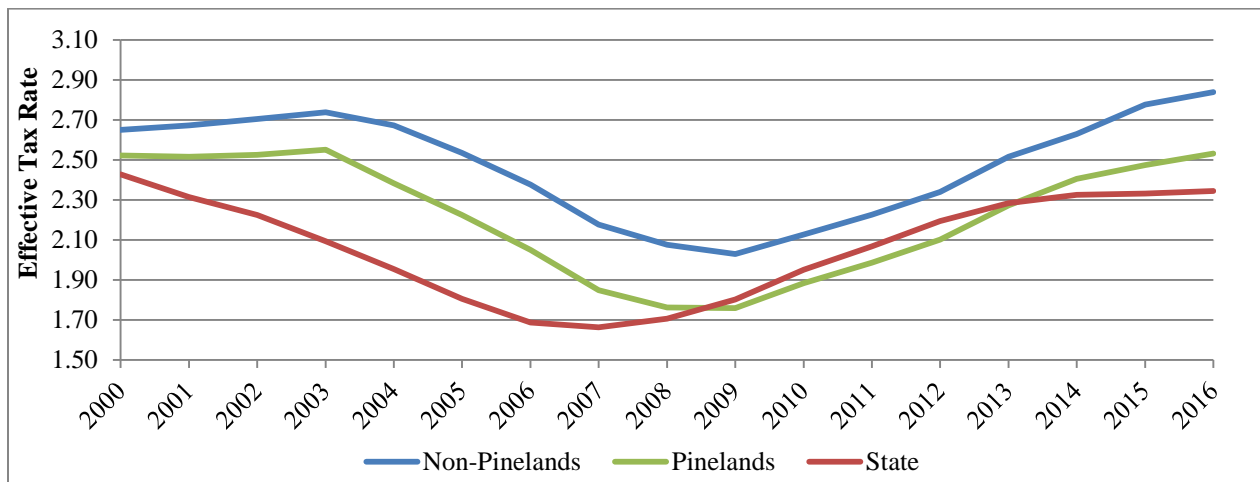


Compared with tax rates in 2014, when the previous LTEM report was completed, the 2016 average rate in the Pinelands increased by 5%, in the Non-Pinelands it increased by 8%, and in the State it increased by 4%. Two municipalities in the southern New Jersey region, Lower Alloways Creek and Avalon Borough, retain a rate below 1.5.

Effective Tax Rate by Region

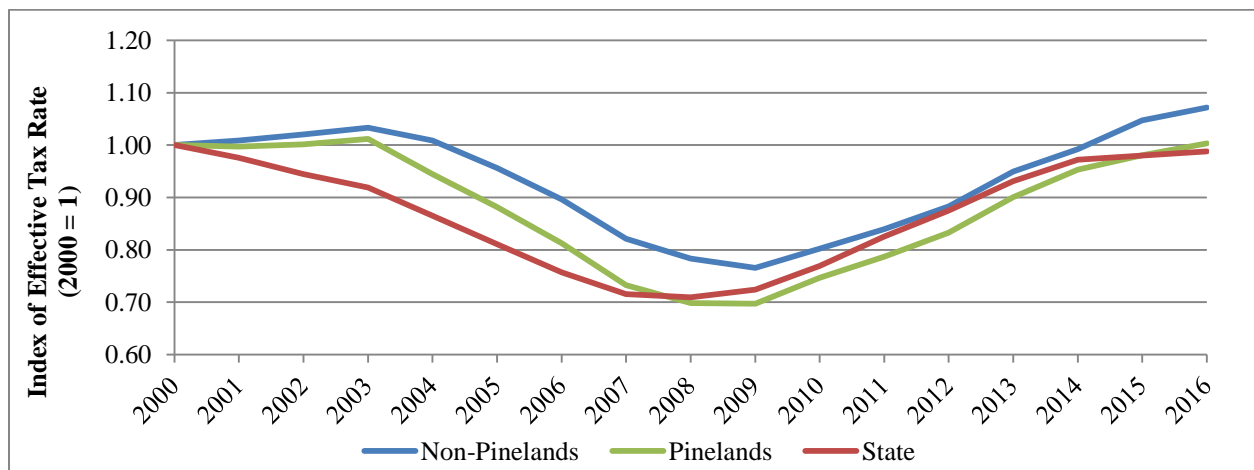
Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Pinelands	2.22	2.05	1.85	1.76	1.76	1.88	1.99	2.10	2.27	2.41	2.47	2.53
Non-Pinelands	2.54	2.38	2.18	2.08	2.03	2.13	2.23	2.34	2.52	2.63	2.78	2.84
State	2.22	2.08	1.94	1.89	1.90	2.01	2.14	2.27	2.42	2.53	2.59	2.63

Effective Tax Rate



The highest effective tax rate in 2016 was found in Egg Harbor City, which had a rate of 4.34 per \$100 of assessed value. Of all the municipalities that have any portion of land inside the Pinelands Area, 37 saw increases in their effective tax rates. The greatest percent increase was in Washington Township, which increased by 25% from 2014 to 2016 bringing that effective rate to 1.87. Although it saw the greatest increase over the two-year period, the effective rate remains among the lowest in the region, ranking 165 out of 202 municipalities. Bass River Township also had a substantial increase of 15% over the 2014 effective rate. Municipalities that saw a decrease in the effective tax rates included Weymouth Township, New Hanover Township, Toms River Township, Jackson Township, Dennis Township, Stafford Township and Manchester Township.

Index of Effective Tax Rate



Using municipal effective tax rate as an indicator of fiscal health, Henry Coleman of Rutgers University reported in 2002 that an effective rate above 3.00 is unsustainable. In 2016, eight municipalities had rates above 3.00. These included Franklin Township (3.05), Berlin Borough (3.08), Buena Borough (3.1), Winslow Township (3.34), Chesilhurst Borough (3.37), Berlin Township (3.54), Waterford Township (3.66), Monroe Township (3.54), and Egg Harbor City (4.34).

Table F3

2016 Effective Tax Rates

Municipality	County	2015 Effective Tax Rate	2016 Effective Tax Rate	2015 South N.J. Rank	2016 South N.J. Rank
Egg Harbor City	Atlantic	4.12	4.34	14	12
Waterford Township	Camden	3.55	3.66	38	39
Berlin Township	Camden	3.69	3.54	33	42
Monroe Township	Gloucester	3.44	3.54	43	43
Chesilhurst Borough	Camden	3.36	3.37	46	53
Winslow Township	Camden	3.23	3.33	58	58
Buena Borough	Atlantic	3.11	3.10	66	69
Franklin Township	Gloucester	2.94	3.05	77	74
Egg Harbor Township	Atlantic	2.89	2.99	85	79
Medford Lakes Borough	Burlington	3.00	2.99	72	81
Galloway Township	Atlantic	2.82	2.98	95	84
Hamilton Township	Atlantic	2.68	2.91	107	90
Medford Township	Burlington	2.78	2.82	98	101
South Toms River Borough	Ocean	2.67	2.77	110	103
Lakehurst Borough	Ocean	2.63	2.71	111	106
Mullica Township	Atlantic	2.42	2.68	128	111
Barnegat Township	Ocean	2.60	2.66	114	113
Evesham Township	Burlington	2.60	2.64	113	115
Buena Vista Township	Atlantic	2.47	2.60	125	118
Wrightstown Borough	Burlington	2.80	2.59	97	119
Shamong Township	Burlington	2.55	2.59	118	120
Hammonton Town	Atlantic	2.52	2.57	122	121
Tabernacle Township	Burlington	2.61	2.57	112	122
Maurice River Township	Cumberland	2.54	2.54	119	126
Southampton Township	Burlington	2.45	2.49	126	127
Eagleswood Township	Ocean	2.24	2.43	139	131
Port Republic City	Atlantic	2.22	2.35	140	135
Estell Manor City	Atlantic	2.19	2.31	144	137
Pemberton Township	Burlington	2.26	2.28	138	141
Little Egg Harbor Township	Ocean	2.28	2.27	136	142
Woodland Township	Burlington	2.21	2.20	141	143
Manchester Township	Ocean	2.17	2.17	145	146
Beachwood Borough	Ocean	2.10	2.16	151	150
Stafford Township	Ocean	2.11	2.14	150	151
Bass River Township	Burlington	1.99	2.13	159	152
Plumsted Township	Ocean	2.05	2.13	155	153
Jackson Township	Ocean	2.15	2.11	146	154
Weymouth Township	Atlantic	2.06	2.09	154	156
Lacey Township	Ocean	1.92	2.06	162	157
Berkeley Township	Ocean	1.99	2.00	158	161
Folsom Borough	Atlantic	1.97	1.95	161	163
Washington Township	Burlington	1.72	1.87	171	165
Ocean Township	Ocean	1.75	1.80	169	168
New Hanover Township	Burlington	1.80	1.73	166	171
Upper Township	Cape May	1.59	1.67	176	175
Woodbine Borough	Cape May	1.60	1.62	175	176
Dennis Township	Cape May	1.52	1.52	179	178
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>					
Berlin Borough	Camden	3.06	3.08	69	71
Springfield Township	Burlington	2.73	2.71	103	106
Vineland City	Cumberland	2.33	2.45	133	130
North Hanover Township	Burlington	2.10	2.10	152	155
Toms River Township	Ocean	1.85	1.85	164	166
Corbin City	Atlantic	1.77	1.73	168	170

F4

Assessment Class Proportions

N.J. Department of Community Affairs, Div. LGS

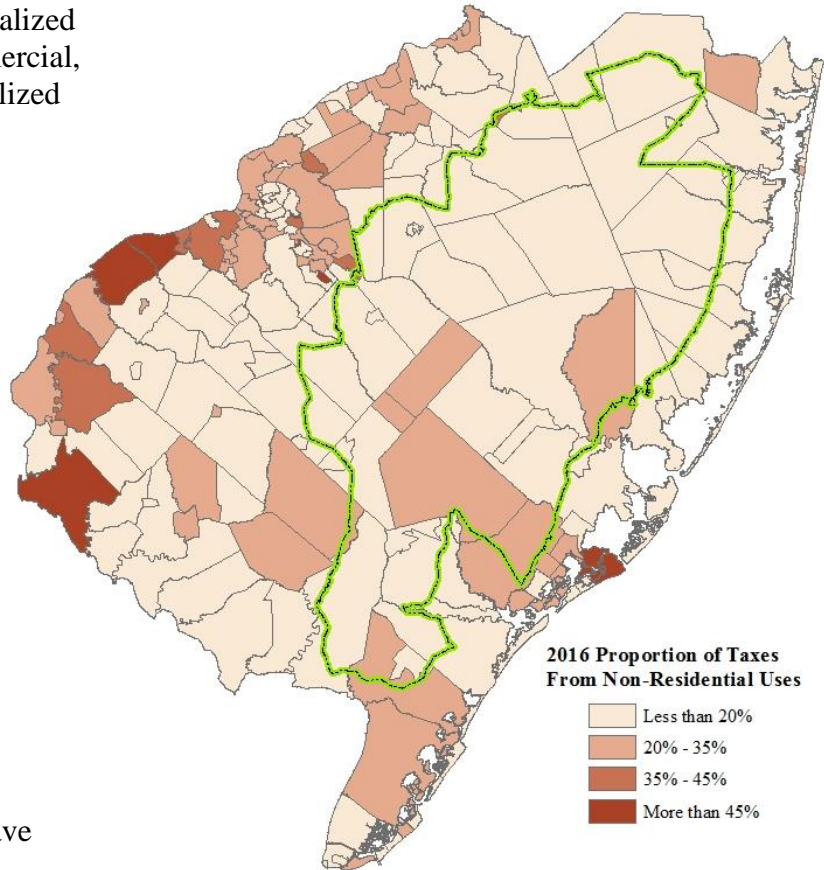
Updated for 2017 LTEM with 2016 data

From 2014 to 2016, tax assessment class proportions stayed mostly the same. The most significant change occurred in the Non-Pinelands municipalities, where the proportion of commercial assessed valuations dropped by almost 2 percentage points while the residential proportion increased by almost the same percentage points.

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

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

Findings: Changes in land use since 1999 have occurred slowly. In all three regions, municipal class percentages have been largely dominated by residential uses. Also since 1999, only the residential portion of the tax base has grown, while the remaining classes have decreased.



In 2016, there were no significant changes in the Pinelands proportions; all assessment classes retained approximately the same portion of the tax base. In the Non-Pinelands, the commercial category decreased by almost two full percentage points and the residential showed an almost identical increase in percentage. In the state, assessment class percentages went mostly unchanged from 2014; although residential proportion increased by almost 1%.

Of the individual municipalities with at least 10% of their land in the Pinelands Area, Bass River Township, Dennis Township, Weymouth Township and Upper Township each saw their proportions from residential uses increase by upwards of two percentage points. These same towns saw comparable reductions in proportion of commercial assessment class value. Two municipalities, Vineland City and New Hanover Township, had decreases of at least two percentage points in the residential proportion of total assessed value, with similar increases in commercial proportion.

Table F4a

Assessment Class Proportions in Municipal Valuations

Pinelands

Class	2005	2010	2015	2016	% Point Change 2005 - 2016
Vacant Land	5%	3%	2%	2%	-2%
Residential	81%	84%	85%	84%	3%
Farmland	< 1%	< 1%	< 1%	< 1%	- <1%
Commercial	11%	10%	9%	10%	- 1%
Industrial	1%	1%	1%	1%	- <1%
Apartment	2%	2%	2%	2%	- <1%

Non-Pinelands

Class	2005	2010	2015	2016	% Point Change 2005 - 2016
Vacant Land	3%	3%	2%	2%	- <1%
Residential	74%	78%	77%	79%	5%
Farmland	< 1%	< 1%	< 1%	< 1%	- <1%
Commercial	18%	16%	16%	15%	-4%
Industrial	3%	2%	2%	2%	-1%
Apartment	2%	2%	2%	2%	- <1%

State

Class	2000	2005	2010	2014	% Point Change 2005- 2016
Vacant Land	2%	2%	2%	2%	-<1%
Residential	74%	76%	77%	77%	3%
Farmland	< 1%	< 1%	< 1%	< 1%	- <1%
Commercial	15%	15%	14%	14%	-1%
Industrial	6%	5%	4%	4%	-2%
Apartment	3%	3%	3%	3%	< 1%

Table F4b Assessment Class Proportions for Pinelands Municipalities (2016)

Municipality	County	Vacant	Residential	Agriculture	Commercial	Industrial	Apartments
Medford Lakes Borough	Burlington	< 1%	98%	0%	2%	0%	0%
Shamong Township	Burlington	1%	95%	< 1%	3%	< 1%	0%
Beachwood Borough	Ocean	1%	95%	0%	3%	< 1%	< 1%
Tabernacle Township	Burlington	1%	94%	< 1%	4%	< 1%	0%
Port Republic City	Atlantic	3%	94%	< 1%	3%	0%	0%
Ocean Township	Ocean	4%	91%	< 1%	5%	< 1%	0%
Waterford Township	Camden	2%	91%	< 1%	6%	< 1%	1%
Plumsted Township	Ocean	2%	90%	< 1%	5%	1%	< 1%
Berkeley Township	Ocean	3%	90%	< 1%	6%	< 1%	1%
Pemberton Township	Burlington	2%	89%	< 1%	6%	< 1%	2%
Mullica Township	Atlantic	5%	89%	1%	5%	< 1%	< 1%
Southampton Township	Burlington	2%	89%	1%	8%	1%	0%
Estell Manor City	Atlantic	6%	89%	1%	3%	1%	< 1%
Little Egg Harbor Township	Ocean	6%	89%	< 1%	6%	< 1%	< 1%
Franklin Township	Gloucester	3%	88%	< 1%	8%	0%	< 1%
Barnegat Township	Ocean	4%	88%	< 1%	6%	< 1%	1%
Medford Township	Burlington	1%	88%	< 1%	9%	1%	2%
Jackson Township	Ocean	3%	87%	< 1%	8%	1%	1%
Winslow Township	Camden	3%	87%	< 1%	7%	1%	2%
Chesilhurst Borough	Camden	7%	86%	0%	5%	1%	< 1%
Upper Township	Cape May	4%	86%	< 1%	9%	1%	< 1%
Woodland Township	Burlington	5%	85%	1%	4%	6%	0%
South Toms River Borough	Ocean	2%	84%	0%	14%	< 1%	0%
Lacey Township	Ocean	3%	84%	< 1%	8%	5%	< 1%
Monroe Township	Gloucester	3%	84%	< 1%	12%	< 1%	1%
Buena Vista Township	Atlantic	5%	84%	< 1%	8%	2%	< 1%
Stafford Township	Ocean	2%	84%	< 1%	14%	< 1%	< 1%
Weymouth Township	Atlantic	5%	83%	< 1%	10%	< 1%	1%
Galloway Township	Atlantic	3%	83%	< 1%	11%	< 1%	2%
Maurice River Township	Cumberland	4%	83%	1%	6%	6%	< 1%
Buena Borough	Atlantic	3%	83%	1%	10%	1%	3%
Lakehurst Borough	Ocean	1%	80%	0%	17%	0%	1%
Washington Township	Burlington	3%	80%	2%	13%	2%	0%
Dennis Township	Cape May	5%	79%	< 1%	16%	0%	0%
Evesham Township	Burlington	1%	79%	< 1%	15%	1%	5%
Egg Harbor City	Atlantic	3%	79%	0%	14%	2%	2%
Woodbine Borough	Cape May	4%	78%	< 1%	13%	2%	2%
Manchester Township	Ocean	4%	77%	< 1%	10%	1%	8%
Bass River Township	Burlington	6%	77%	< 1%	17%	0%	0%
New Hanover Township	Burlington	3%	77%	1%	19%	< 1%	0%
Folsom Borough	Atlantic	4%	75%	< 1%	9%	12%	0%
Hammonton Town	Atlantic	2%	75%	1%	20%	2%	1%
Egg Harbor Township	Atlantic	4%	75%	< 1%	20%	1%	< 1%
Eagleswood Township	Ocean	11%	75%	< 1%	12%	2%	< 1%
Hamilton Township	Atlantic	4%	69%	< 1%	21%	1%	5%
Berlin Township	Camden	3%	54%	< 1%	33%	9%	1%
Wrightstown Borough	Burlington	3%	52%	< 1%	31%	1%	12%
Springfield Township	Burlington	3%	86%	2%	9%	0%	0%
Corbin City	Atlantic	6%	84%	< 1%	10%	0%	0%
North Hanover Township	Burlington	2%	81%	1%	13%	< 1%	3%
Toms River Township	Ocean	2%	80%	< 1%	16%	1%	2%
Berlin Borough	Camden	2%	80%	< 1%	15%	1%	1%
Vineland City	Cumberland	1%	64%	< 1%	24%	7%	3%

F5

Local Municipal Purpose Revenues & State Aid

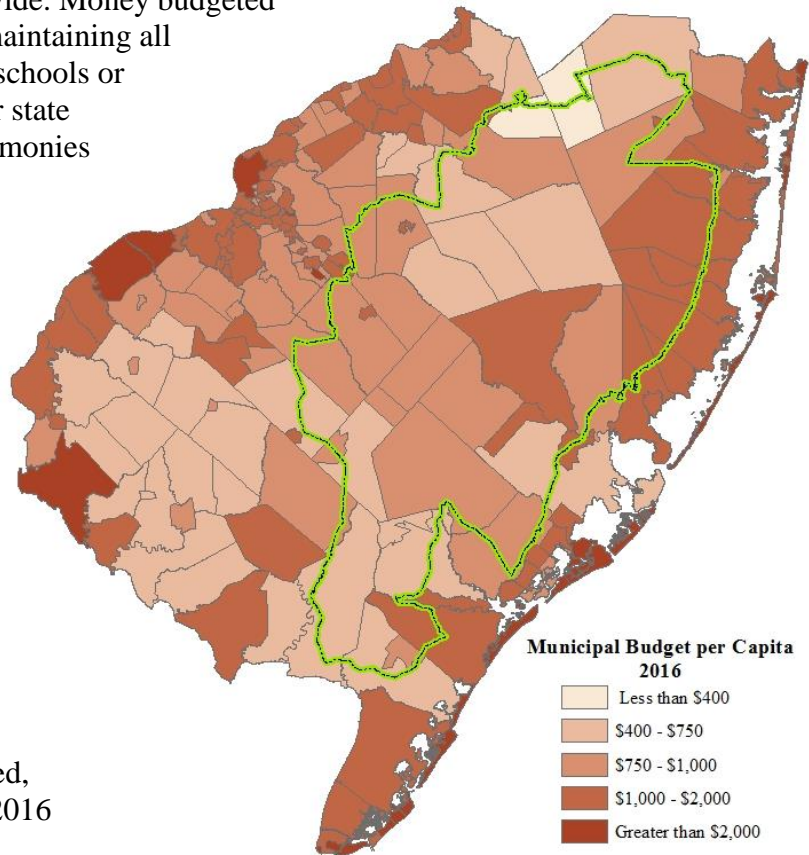
N.J. Department of Community Affairs, Div. LGS

Updated for 2017 LTEM Report with 2016 data

In 2016, per capita municipal budgets in the Pinelands increased to \$901 per capita (a 2% increase over 2014.) Budgets in the Non-Pinelands also increased 2% from 2014, up to \$1,468 per capita in 2016.

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

Unit of Analysis: Municipal-level data are regionally aggregated to allow for inside/outside the Pinelands analysis. Aggregates are sums, not averages. Unless otherwise noted, all dollar amounts have been adjusted to 2016 dollars.



Findings: Throughout the history of the Long Term Economic Monitoring program, the per capita annual municipal budget in the Non-Pinelands has always been greater than that of the Pinelands. This disparity continues for this report. Since 1999, the average per capita budget municipal budget inside the Pinelands area is 65% that of the Non- Pinelands area. For 2016, the per capita municipal budget in the Pinelands was \$901, as compared with \$1,468 per capita in the Non-Pinelands area. In 1999, the per capita budget in the Pinelands was \$830. It was \$1,222 in the Non-Pinelands. The map above shows municipal per capita budgets.

Meanwhile, state aid continues to decline both inside the Pinelands and outside the Pinelands. The trend of decreasing State aid has been rather gradual in the Pinelands since 1999. Despite several minor and temporary increases (2001, 2004, and 2015), per capita aid has decreased from \$232 per capita in 1999 down to the \$119 in 2016. That decrease amounts to a 48% drop in per capita state aid in the Pinelands

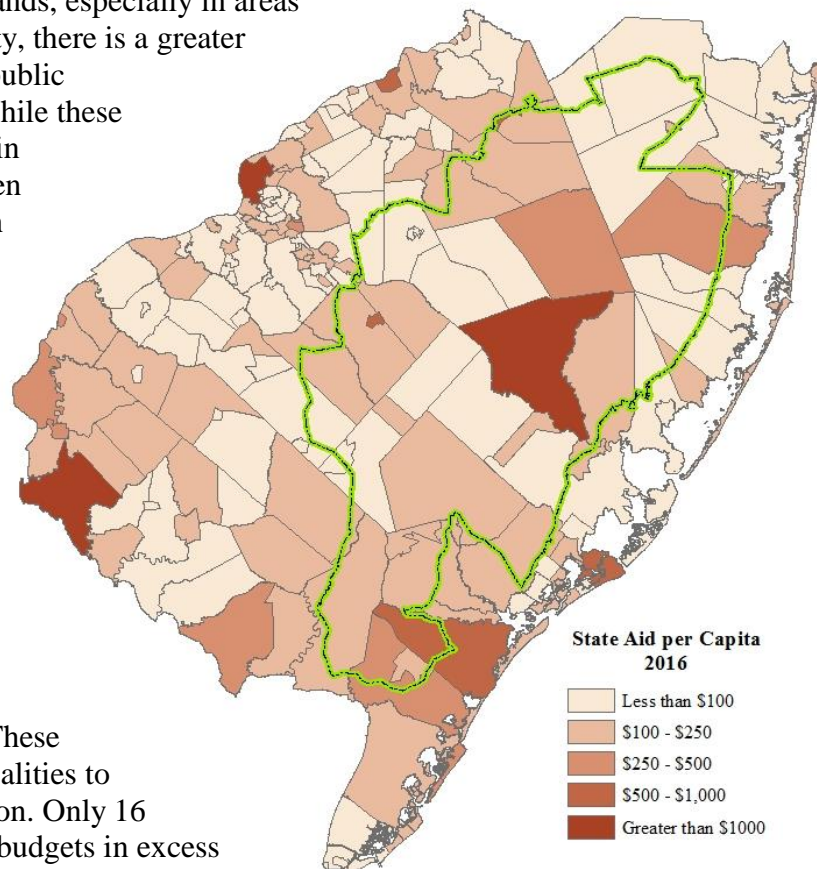
area since 1999. The change since 2014 is only a 1% decrease. More detailed figures are available in table F5a, below.

State aid in the Non-Pinelands has also decreased since 1999. A significant shift occurred in 2010 State aid in the Non-Pinelands region. Before 2010, the cumulative average was \$244 per capita. Starting in 2010 through 2016, the average is \$173 per capita. In 2016, state aid per capita in the Non-Pinelands was \$177, a 3% decrease from 2014. The map below shows state aid per capita in municipalities across southern New Jersey.

Municipal Budgets and State Aid²⁰

	Population Estimate	Total Municipal Budget	Municipal Budget per Capita	State Aid	State Aid per Capita
Pinelands in 2005	671,991	\$599,295,882	\$892	\$137,409,496	\$204
Pinelands in 2016	703,189	\$633,823,252	\$901	\$83,778,740	\$119
Change	14%	6%	1%	-39%	-42%
Non-Pinelands in 2005	1,705,381	\$2,333,146,310	\$1,368	\$440,697,322	\$258
Non-Pinelands in 2016	1,723,726	\$2,529,778,687	\$1,468	\$305,783,764	\$177
Change	5%	8%	7%	-31%	-31%

Although the reasons for the difference in per capita budgets and state aid between the Pinelands and the Non-Pinelands are not specifically researched here, several possibilities exist. In the Non-Pinelands, especially in areas around Philadelphia and Atlantic City, there is a greater offering of certain services such as public transportation or waste treatment. While these services are sometimes also offered in Pinelands communities, they are often offered to a lesser degree. Also, both Atlantic City and Camden City suffer from extreme economic distress that has led to a large State effort to police and manage those cities. The cost of those efforts may be wrapped into the budgets and State aid.



Of the Pinelands municipalities, Berkeley Township continues to have the largest municipal budget at \$45,943,787, followed by Stafford Township and Jackson Township. These three are the only Pinelands municipalities to have a budget greater than \$40 million. Only 16 other Pinelands municipalities have budgets in excess of \$10 million. Washington Township has the only municipal budget that is less than \$1 million.

For 2016, Berlin Township had the greatest budget per capita at \$1,866 while the lowest budget per capita belongs to New Hanover Township at \$204. There were 27 Pinelands municipalities that increased their

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

municipal budgets per capita by an average of \$40 from 2015 to 2016. Conversely, 20 Pinelands municipalities decreased their municipal budgets per capita by an average of \$37. There were three municipalities where the change in per capita budgets was \$1 or less (Mullica Township, Galloway Township, and Monroe Township.)

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

Per capita State aid has decreased marginally across the Pinelands, although the dollar amounts allocated to each municipality have remained constant. For example, Lacey Township was allocated \$11,273,840 each year from 2014 to 2016. This translates to a per capita rate of \$405 in 2014 as compared with \$394 in 2016 (using estimated populations and converting 2014 to 2016 dollars.) Ten municipalities saw some increase in state aid, but the majority saw decreasing state aid. The average decrease was \$3.75 per capita.

The graph below shows average per capita state aid to municipalities in the Pinelands and Non-Pinelands regions indexed to the average for all of southern New Jersey in 1999. The graph uses an estimated per capita aid for all southern New Jersey municipalities of \$244 (adjusted to 2016 dollars) in 1999 and compares average aid in the Pinelands and Non-Pinelands municipalities to the aid in that initial year. Further comparisons can be seen in Table F5a below and details for Pinelands towns in F5b, below.

Index of per Capita State Aid

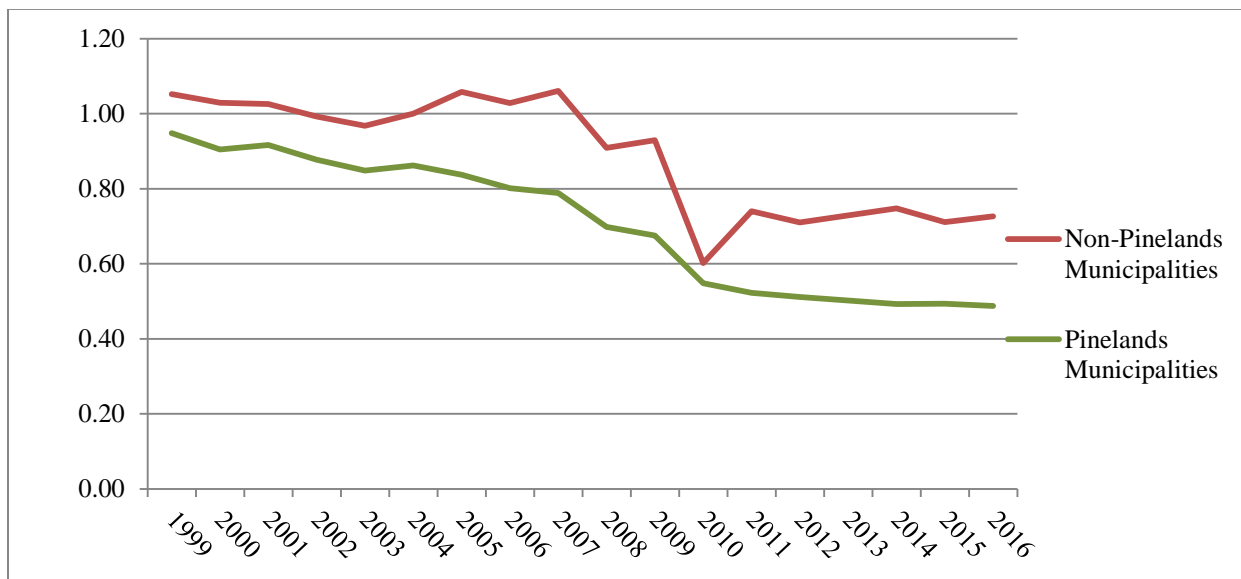


Table F5a

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	\$192,386,999	\$314,615,040	\$507,002,039	\$830	\$141,421,304	\$232
2000	618,063	\$196,096,579	\$312,489,568	\$508,586,148	\$823	\$136,574,535	\$221
2001	630,581	\$211,278,254	\$320,067,678	\$531,345,932	\$843	\$141,158,753	\$224
2002	643,688	\$219,833,603	\$323,480,595	\$543,314,198	\$844	\$138,016,040	\$214
2003	655,268	\$234,894,680	\$319,629,739	\$554,524,418	\$846	\$135,731,400	\$207
2004	664,840	\$250,435,475	\$320,421,447	\$570,856,922	\$859	\$139,957,575	\$211
2005	671,991	\$265,012,137	\$334,383,745	\$599,395,882	\$892	\$137,409,496	\$204
2006	678,998	\$285,912,698	\$338,120,300	\$624,032,998	\$919	\$132,915,085	\$196
2007	683,974	\$304,725,882	\$339,519,856	\$644,245,738	\$942	\$131,738,988	\$193
2008	688,959	\$325,481,819	\$322,896,440	\$648,378,259	\$941	\$117,489,216	\$171
2009	693,936	\$346,818,953	\$312,552,621	\$659,371,574	\$950	\$114,527,511	\$165
2010	698,092	\$363,182,434	\$284,002,452	\$647,184,886	\$927	\$93,519,839	\$134
2011	701,018	\$369,307,264	\$254,150,076	\$623,457,340	\$889	\$89,449,515	\$128
2012	702,935	\$371,831,169	\$233,747,923	\$605,579,092	\$861	\$87,892,045	\$125
2013	704,310	\$381,195,609	\$241,277,798	\$622,473,407	\$884	\$86,458,384	\$123
2014	705,262	\$386,286,855	\$234,814,190	\$621,101,046	\$881	\$84,936,317	\$120
2015	703,865	\$392,226,626	\$240,948,793	\$629,298,021	\$894	\$84,835,620	\$121
2016	703,189	\$398,500,703	\$239,168,162	\$633,823,252	\$901	\$83,778,740	\$119

Non-Pinelands

Year	Population Estimate	Local Municipal Purpose Revenue	Miscellaneous Revenues	Total Municipal Budget	Municipal Budget per Capita	Total State Aid	State Aid per Capita
1999	1,639,053	\$935,543,416	\$1,068,071,758	\$2,003,615,174	\$1,222	\$421,285,637	\$257
2000	1,645,496	\$934,605,328	\$1,077,246,154	\$2,011,851,482	\$1,223	\$413,631,643	\$251
2001	1,655,892	\$932,034,450	\$1,078,539,464	\$2,010,573,913	\$1,214	\$414,910,874	\$251
2002	1,672,319	\$982,163,524	\$1,097,563,502	\$2,079,727,026	\$1,244	\$405,533,314	\$242
2003	1,686,044	\$1,026,033,019	\$1,094,086,602	\$2,120,119,620	\$1,257	\$398,426,393	\$236
2004	1,697,698	\$1,070,490,169	\$1,150,639,186	\$2,221,129,355	\$1,308	\$414,853,168	\$244
2005	1,705,381	\$1,135,571,889	\$1,197,574,421	\$2,333,146,310	\$1,368	\$440,697,322	\$258
2006	1,713,543	\$1,194,985,508	\$1,142,729,543	\$2,337,715,051	\$1,364	\$430,461,288	\$251
2007	1,716,916	\$1,242,675,715	\$1,163,287,074	\$2,405,962,789	\$1,401	\$444,850,474	\$259
2008	1,719,558	\$1,330,798,396	\$1,163,672,056	\$2,494,470,452	\$1,451	\$381,863,965	\$222
2009	1,721,609	\$1,419,011,355	\$1,082,726,822	\$2,501,738,177	\$1,453	\$390,793,091	\$227
2010	1,723,949	\$1,486,137,843	\$1,031,062,944	\$2,517,200,787	\$1,460	\$253,386,607	\$147
2011	1,726,247	\$1,465,677,669	\$982,252,613	\$2,447,930,283	\$1,417	\$312,215,097	\$181
2012	1,727,178	\$1,470,439,297	\$916,997,860	\$2,387,437,156	\$1,381	\$299,508,301	\$173
2013	1,725,583	\$1,474,320,369	\$955,416,286	\$2,429,736,656	\$1,407	\$307,379,783	\$178
2014	1,725,407	\$1,493,898,985	\$986,668,523	\$2,480,567,508	\$1,438	\$315,108,302	\$183
2015	1,724,062	\$1,452,102,645	\$1,060,906,426	\$2,516,886,470	\$1,460	\$299,515,114	\$174
2016	1,723,726	\$1,465,023,888	\$1,060,909,186	\$2,529,778,687	\$1,468	\$305,783,764	\$177

Table F5b Municipal Purpose Revenues and State Aid by Municipality (2016)

Municipality	County	Population Estimate	Municipal Budget	Municipal Budget per Capita	Total State Aid	State Aid per Capita
Washington Township	Burlington	695	\$851,130	\$1,225	\$817,007	\$1,214
Upper Township	Cape May	11,976	\$12,277,585	\$1,025	\$6,323,653	\$522
Wrightstown Borough	Burlington	787	\$1,038,135	\$1,319	\$412,067	\$518
Chesilhurst Borough	Camden	1,636	\$2,731,748	\$1,670	\$826,340	\$508
Lacey Township	Ocean	28,569	\$29,512,290	\$1,033	\$11,273,840	\$400
Woodland Township	Burlington	1,778	\$1,204,873	\$678	\$628,559	\$350
Dennis Township	Cape May	6,285	\$4,512,316	\$718	\$1,643,523	\$260
Berlin Township	Camden	5,513	\$10,285,377	\$1,866	\$1,287,847	\$240
Bass River Township	Burlington	1,443	\$1,270,556	\$880	\$304,290	\$211
Estell Manor City	Atlantic	1,718	\$1,180,884	\$687	\$316,382	\$182
Port Republic City	Atlantic	1,085	\$1,586,771	\$1,462	\$176,307	\$157
Winslow Township	Camden	39,328	\$30,006,963	\$763	\$6,050,378	\$156
Maurice River Township	Cumberland	6,562	\$3,845,614	\$586	\$1,115,305	\$141
Egg Harbor Township	Atlantic	43,504	\$39,847,824	\$916	\$6,039,065	\$138
Eagleswood Township	Ocean	1,604	\$2,064,840	\$1,287	\$203,363	\$126
New Hanover Township	Burlington	8,129	\$1,657,897	\$204	\$893,564	\$123
Waterford Township	Camden	10,754	\$10,630,927	\$989	\$1,304,676	\$122
Woodbine Borough	Cape May	2,494	\$2,417,921	\$969	\$289,537	\$119
Egg Harbor City	Atlantic	4,193	\$5,977,748	\$1,426	\$473,461	\$111
Lakehurst Borough	Ocean	2,692	\$4,060,176	\$1,508	\$295,439	\$109
Pemberton Township	Burlington	27,567	\$23,516,058	\$853	\$3,018,097	\$108
Monroe Township	Gloucester	36,908	\$35,474,686	\$961	\$4,035,796	\$108
Southampton Township	Burlington	10,235	\$6,407,102	\$626	\$1,105,861	\$107
Hamilton Township	Atlantic	26,499	\$25,702,604	\$970	\$2,841,043	\$107
Weymouth Township	Atlantic	2,788	\$1,332,893	\$478	\$281,895	\$104
Berkeley Township	Ocean	41,689	\$45,943,787	\$1,102	\$4,256,465	\$101
Folsom Borough	Atlantic	1,824	\$1,425,962	\$782	\$186,082	\$100
Stafford Township	Ocean	27,153	\$44,124,147	\$1,625	\$2,606,872	\$97
Buena Vista Township	Atlantic	7,461	\$4,532,551	\$607	\$716,567	\$94
Buena Borough	Atlantic	4,456	\$4,223,988	\$948	\$419,272	\$91
Shamong Township	Burlington	6,453	\$3,169,441	\$491	\$582,995	\$91
Tabernacle Township	Burlington	6,892	\$4,107,561	\$596	\$630,161	\$91
South Toms River Borough	Ocean	3,761	\$4,463,792	\$1,187	\$330,995	\$88
Franklin Township	Gloucester	16,568	\$11,773,930	\$711	\$1,451,704	\$87
Hammonton Town	Atlantic	14,428	\$13,208,298	\$915	\$1,272,714	\$86
Medford Township	Burlington	23,440	\$20,634,064	\$880	\$1,991,135	\$85
Mullica Township	Atlantic	6,041	\$5,533,026	\$916	\$493,216	\$80
Manchester Township	Ocean	43,546	\$33,124,795	\$761	\$3,217,467	\$74
Little Egg Harbor Township	Ocean	20,818	\$23,414,772	\$1,125	\$1,449,056	\$71
Medford Lakes Borough	Burlington	4,053	\$4,491,780	\$1,108	\$289,600	\$70
Ocean Township	Ocean	9,013	\$10,883,495	\$1,208	\$606,801	\$70
Evesham Township	Burlington	45,351	\$35,673,898	\$787	\$3,164,693	\$69
Galloway Township	Atlantic	36,753	\$27,443,962	\$747	\$2,581,284	\$69
Jackson Township	Ocean	56,733	\$41,792,709	\$737	\$3,408,439	\$60
Beachwood Borough	Ocean	11,196	\$10,793,684	\$964	\$664,673	\$59
Plumsted Township	Ocean	8,530	\$3,407,700	\$399	\$452,322	\$53
Barnegat Township	Ocean	22,288	\$24,106,606	\$1,082	\$1,048,932	\$47
<i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i>						
Corbin City	Atlantic	3,315	\$536,804	\$1,023	\$102,127	\$207
Springfield Township	Burlington	7,594	\$3,799,350	\$1,017	\$426,607	\$126
Vineland City	Cumberland	60,525	\$60,184,837	\$952	\$6,190,788	\$101
North Hanover Township	Burlington	91,837	\$3,466,608	\$431	\$765,714	\$100
Toms River Township	Ocean	499	\$124,946,304	\$1,366	\$8,492,807	\$93
Berlin Borough	Camden	7,581	\$7,935,831	\$960	\$696,697	\$92

Appendix A. Selected References

In addition to the selected references listed below, this nineteenth report relied on data and results reported in all the previous Long Term Economic Monitoring reports. Reports were issued annually starting in 1997, except in 2010, 2012, and 2017.

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- GIS data used in maps and analysis was provided by the following sources:
- County Boundaries: U.S. Census Bureau
 - Municipal Boundaries: U.S. Census Bureau
 - Census Block Groups: U.S. Census Bureau
 - Census Blocks: U.S. Census Bureau
 - Berry Agriculture Location: USDA National Agriculture Statistics Service
 - Pinelands Area Boundary: N.J. Pinelands Commission
- GIS data used in Municipal Fact Book was provided by the following sources:
- County Boundaries: N.J. Office of Information Technology
 - Municipal Boundaries: N.J. Office of Information Technology

Pinelands Area Boundary: N.J. Pinelands Commission
Pinelands Management Areas: N.J. Pinelands Commission
Water Bodies: U.S. Geological Survey
N.J. Aerial Imagery: N.J. Office of Information Technology
Non-N.J. Aerial Imagery: National Aeronautics and Space Administration

Appendix B. Previous Special Studies

Value-Added Blueberry Products Study

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

Housing Task Force Study

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

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

Pinelands Development Credit Supply & Demand Study

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

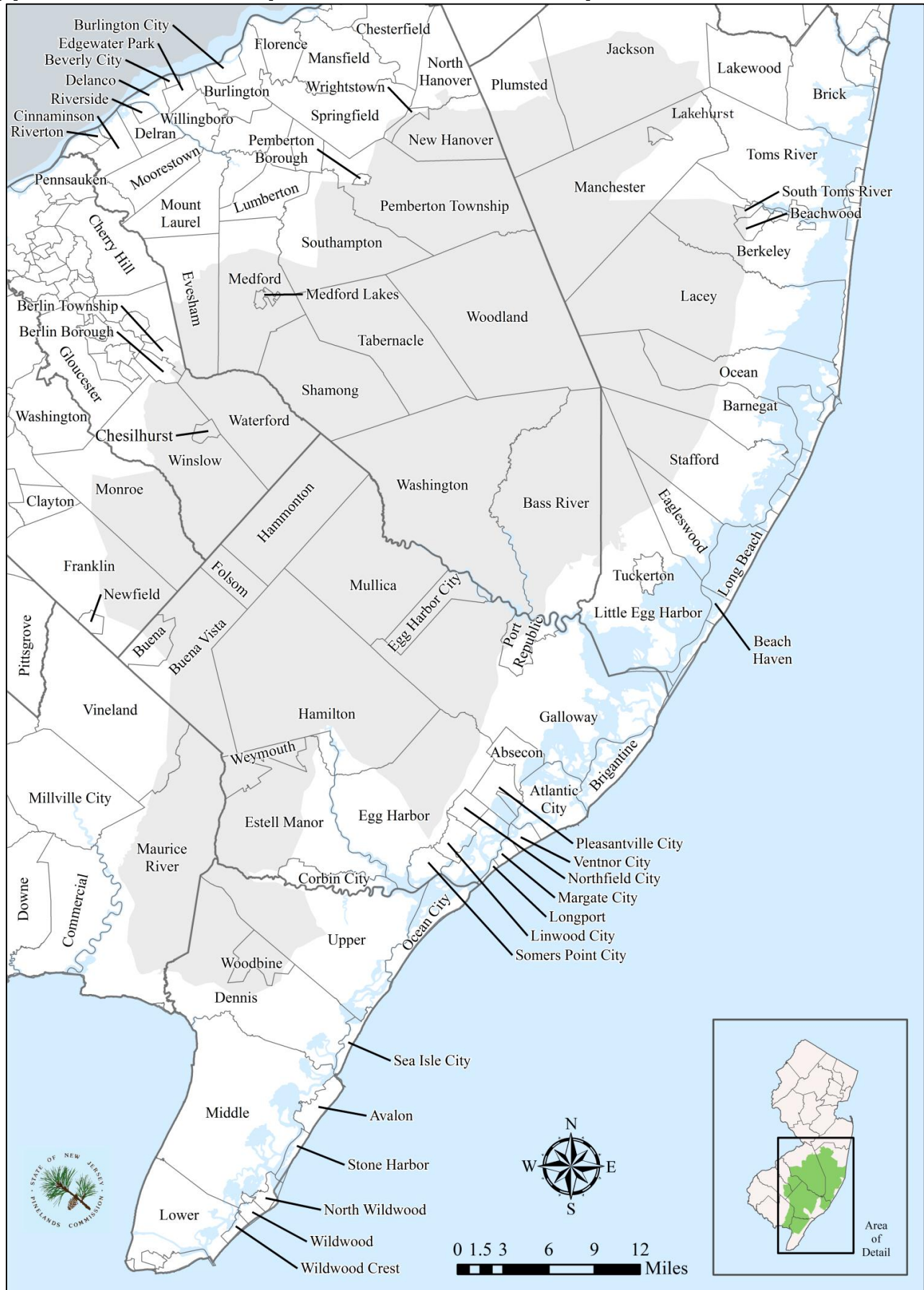
Since the PDC program is market-driven, its ultimate success depends upon a healthy balance between supply and demand pressures in the land development market in the Pinelands. Initially, the PDC program was slow to be utilized by both developers and land owners in the region. However, significant activity in the PDC market occurred between 1996 and 2007, with the price of a development right rising from an initial value of \$2,500 in 1981 to a high of \$40,000 in 2006. Prices have continued to fall since then. The mean sales price for a development right in fiscal year 2015 was \$9,400.

This study is a comprehensive review of what has worked well to this point, in addition to examining new ideas on how further to stimulate use of PDCs in the coming years. A preliminary package of recommendations was submitted to the Commission's Policy and Implementation Committee in the summer of 2007. Revised recommendations were prepared in 2015 after several years of meetings with interested parties. These recommendations, along with updated PDC supply and demand estimate, are expected to be the subject of discussion by the Commission throughout 2016.

Appendix C. Pinelands Acreage by County

County	Total Acreage	Acreage Inside Pinelands	Acreage Outside Pinelands	% Area in Pinelands	% of Pinelands contributed to by County	% of Southern N.J. contributed to by County
Atlantic	391,134	247,877	143,257	63%	26%	17%
Burlington	524,205	334,224	189,981	64%	36%	23%
Camden	145,592	54,907	90,685	38%	6%	6%
Cape May	182,632	34,807	147,825	19%	4%	8%
Cumberland	321,645	45,398	276,247	14%	5%	14%
Gloucester	215,617	33,581	182,036	16%	4%	10%
Ocean	485,569	187,559	298,010	39%	20%	21%

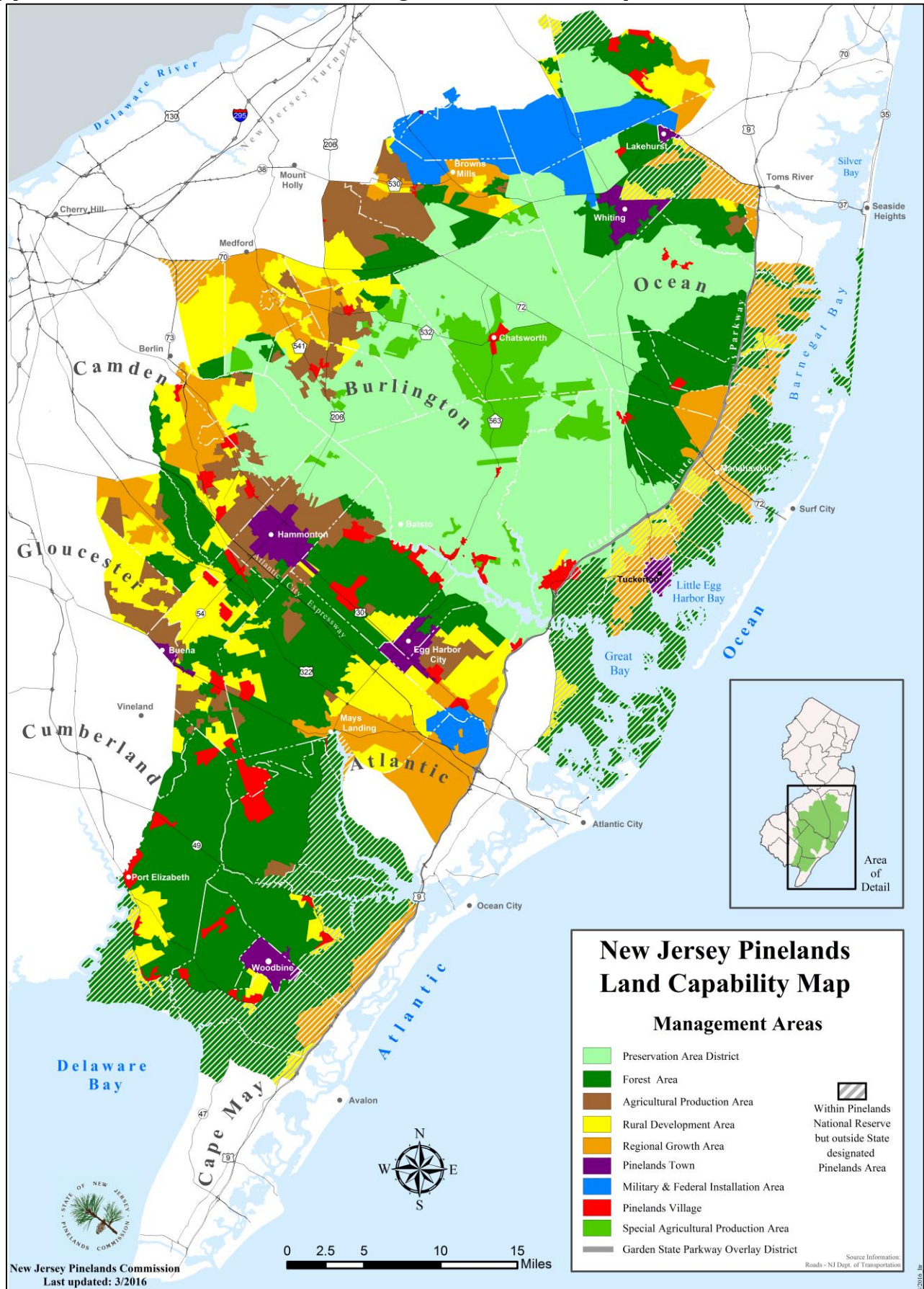
Appendix D. Municipalities of the New Jersey Pinelands



Appendix E. Pinelands Management Areas

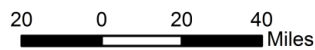
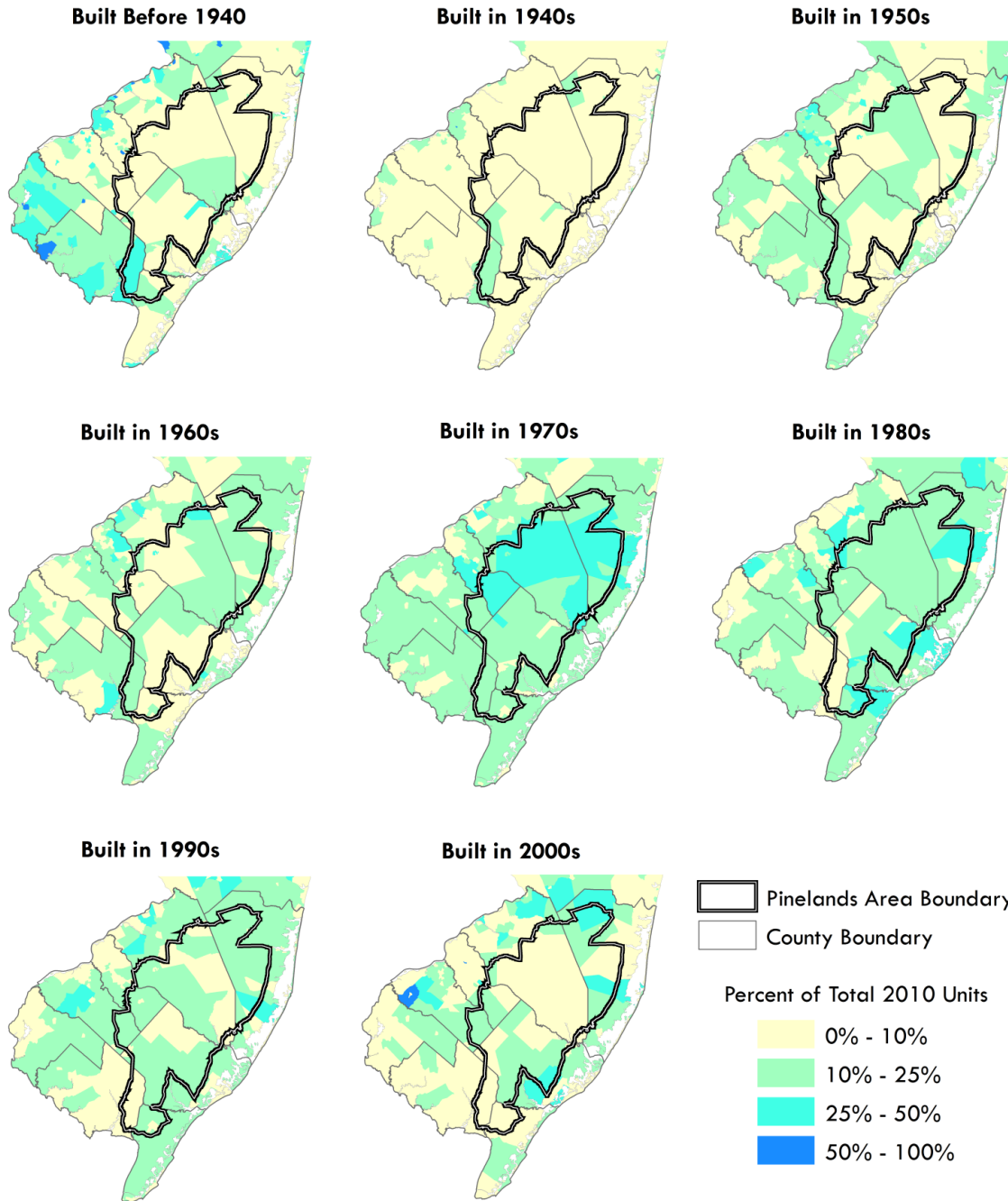
Management Area	Description	Permitted Uses	
		Residential	Nonresidential
Preservation Area District (PAD)	Heart of the Pinelands environment and the most critical ecological region; a large, contiguous wilderness-like area of forest that supports diverse plant and animal communities and is home to many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

Appendix F. Pinelands Management Areas Map



Appendix G. Southern New Jersey Housing Unit Construction

Percentage of Total Housing in 2010 Built in Each Decade



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



Appendix H. Municipal Fact Book

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 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 eight southern New Jersey and municipal ranks for each variable. Since 2003, the Fact Book has also included maps and charts for each municipality. Subsequent Fact Books expanded to add sheets for county level data. County sheets are provided for the seven counties containing any of the 53 Pinelands municipalities. A sheet for the Pinelands area municipalities shows average values for the 53 municipalities compared to Non-Pinelands municipalities of southern New Jersey and the State as a whole.

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 at the 2010 Census 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 reference map (in the upper-right corner) locates the municipality or county in relation to the Pinelands Area.

Municipal Maps

Each Fact Book sheet has a municipal map presenting the Pinelands Management Areas overlaid on 2012 aerial photography. While the Management Area layer gives the reader a sense for where what types of development are encouraged, the aerial photography gives an indication as to where development has already occurred.

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

Data Table

Most of the table is devoted to several municipal variables tracked in the annual report. Variables are from the most current year available, and are shown beside the southern New Jersey municipal average. Rankings are out of the 202 municipalities in southern New Jersey. A rank of "1" indicates the highest value for a particular variable, while a rank of "202" typically indicates the lowest value, or that it is last in the series of the variable being tracked. It is important to note that these rankings *do not* indicate a positive or negative connotation.

The variables in the table include: population estimate, population density, population change 2010 to 2016 (estimate), percentage of total land area that is permanently protected *and* in the Pinelands Area, assessed acres of farmland, building permits, residential housing transactions, average sale price of homes, equalized value of property (in millions of dollars), effective tax rate, average residential property tax bill, per capita

income estimates (actual values for census years), and estimated unemployment rate. Thorough descriptions of these variables can be found in the appropriate sections in the *Annual Report*.

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

General Caveats

- **Ranking Values.** Again, a rank of "1" indicates the highest value for a particular variable, while a rank of "202" typically indicates the lowest value. It is important to note that these rankings *do not* indicate a positive or negative connotation. The reader should understand that the rankings can be interpreted in different ways.
- **Data Volatility.** Municipalities with small populations tend to experience greater volatility in values and rankings from one year to the next.
- **Comparing Ranks to Previous Fact Books.** The change in rank for a particular municipality from its rank in previous Fact Books should be interpreted with caution, as data volatility or re-definition 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) generally 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. The percentage of permanently protected land was updated to April 2018 totals, except for five municipalities. Preserved land is not updated for Buena Vista Township, Eagleswood Township, Stafford Township, Washington Township, and Weymouth Township due to data complications.
- **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 (e.g. 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.
- **Pinelands Area Population Density:** The density for the Pinelands area is calculated on the total population of the 47 municipalities with more than 10% of their area inside the Pinelands boundary and on the total area of those municipalities, including both areas inside and outside the Pinelands boundary.

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

County Level Fact Sheets

County-level fact sheets are reported for seven of the eight counties of southern New Jersey and are presented following the municipal sheets. The county-level sheets follow the same format and design as the municipal-level sheets. It is important to note that the southern New Jersey average that is presented in-between the county value and county rank is *not* the same as the southern New Jersey average shown in the municipal sheets. The southern New Jersey average shown in the county sheets is a *county* average (out of seven 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

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Cape May County H63
Cumberland County H64
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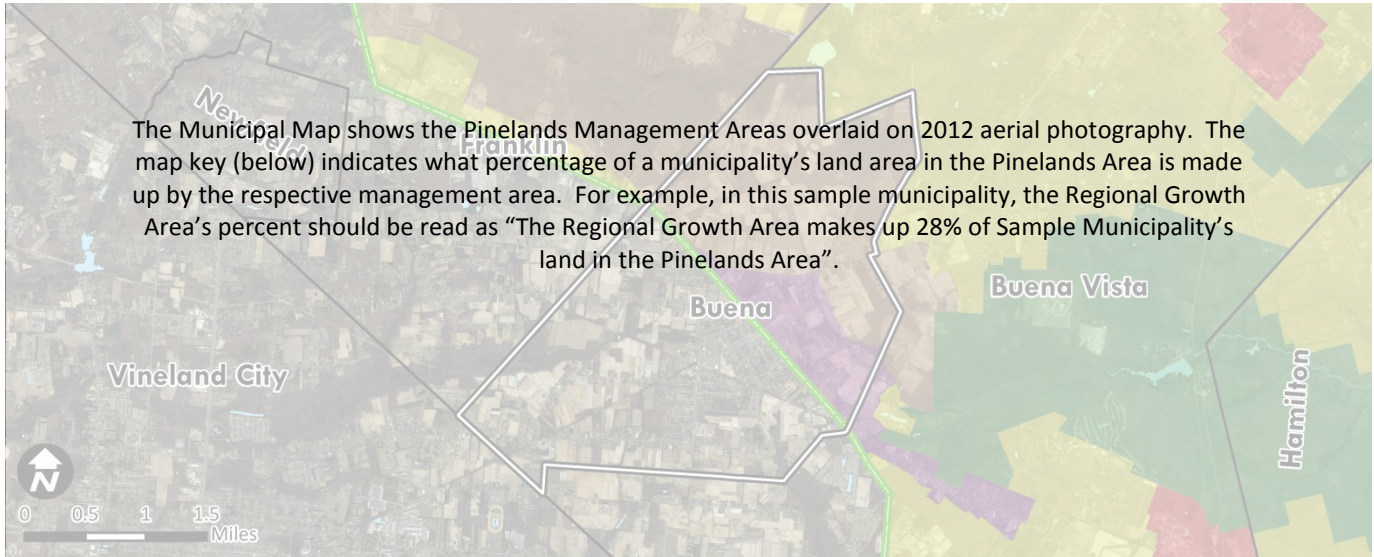
Pinelands Area Municipalities..... H67

Sample Municipality

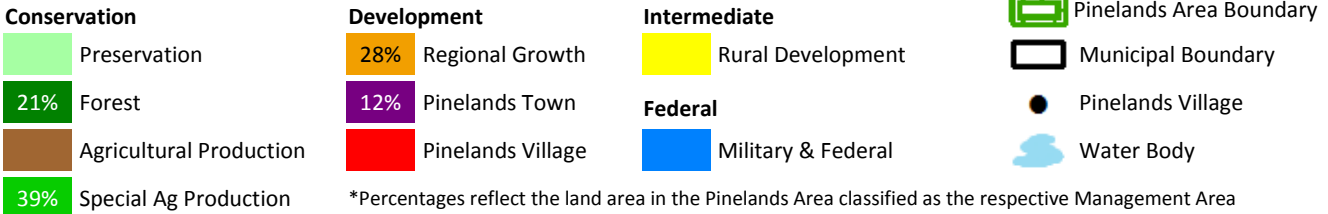


Municipal population inside Pinelands Area (% of total population) - U.S. Census Bureau 2010 Census Block

Municipal acreage inside Pinelands Area (% of total acreage) - N.J. Pinelands Commission 2014

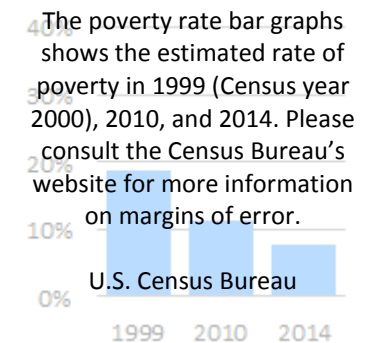


Pinelands Management Areas



2014 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate		U.S. Census Bureau	
Population Density (per mile ²)		N.J. Pinelands Commission	
Population Change - 2010 to 2014		U.S. Census Bureau	
% Land Protected in Pinelands Area		N.J. Pinelands Commission	
Assessed Acres of Farmland		N.J. Dept. of Treasury	
Building Permits Issued		N.J. Dept. of Labor	
Housing Transactions		N.J. Dept. of Treasury	
Average Home Sale Price		N.J. Dept. of Treasury	
Equalized Property Value (millions)		N.J. Dept. of Community Affairs	
Effective Tax Rate		N.J. Dept. of Treasury	
Average Residential Property Tax Bill		N.J. Dept. of Community Affairs	
Per Capita Income Estimate		ESRI	
Estimated Unemployment Rate		N.J. Dept. of Labor	
Private Sector Employment	N.J. Dept. of Labor	Private Sector Establishments	N.J. Dept. of Labor
		Private Sector Avg. Annual Wages	N.J. Dept. of Labor

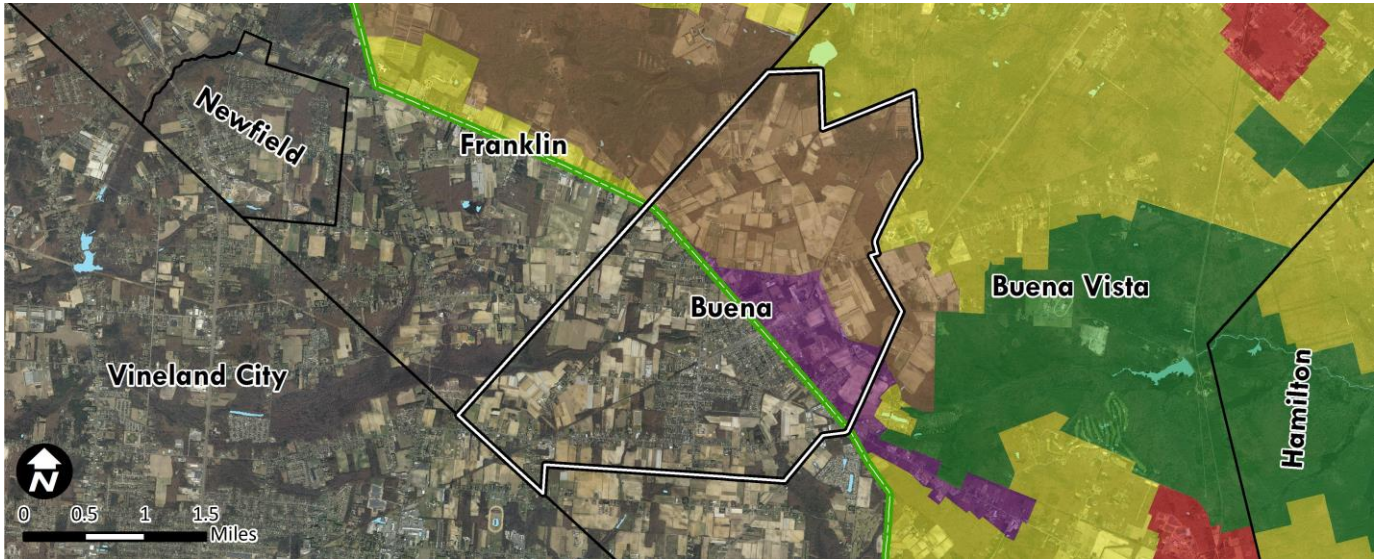
Estimated Poverty Rate by Year



Buena Borough

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

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



Pinelands Management Areas

Conservation

- Preservation
- Forest
- 78% Agricultural Production
- Special Ag Production

Development

- Regional Growth
- 22% Pinelands Town
- Pinelands Village

Intermediate

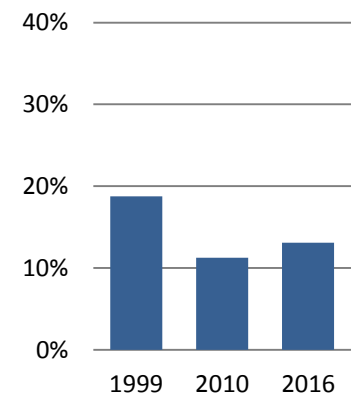
- Rural Development
- Federal**
- Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,456	12,049	117
Population Density (per mile ²)	589	1,763	126
Population Change - 2010 to 2016	-3.2%	0.79%	153
% Land Protected in Pinelands Area*	22%	37%	34
Assessed Acres of Farmland	2,446	2,408	60
Building Permits Issued	0	33	159
Housing Transactions	31	116	127
Average Home Sale Price	\$169,542	\$295,642	147
Equalized Property Value (millions)	\$272.7	\$1,499.2	147
Effective Tax Rate	3.10	2.77	69
Average Residential Property Tax Bill	\$5,035	\$6,195	138
Per Capita Income Estimate	\$27,126	\$37,580	156
Unemployment Rate	7.3%	6.1%	42

Estimated Poverty Rate by Year



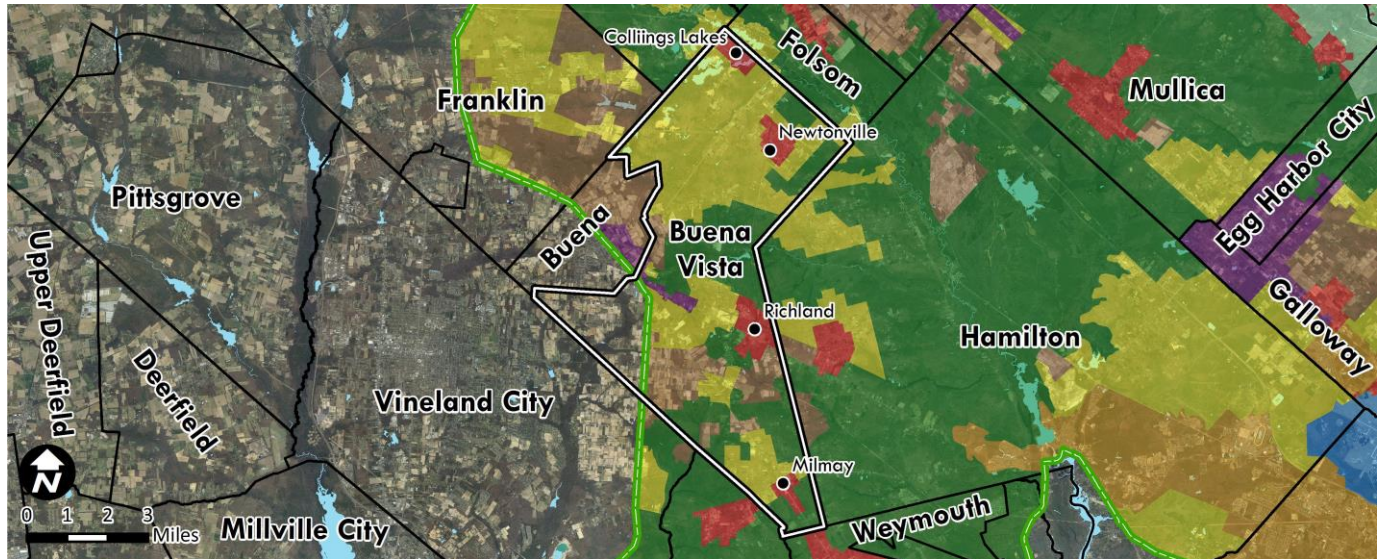
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
1130	91	\$52,593

*Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Buena Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

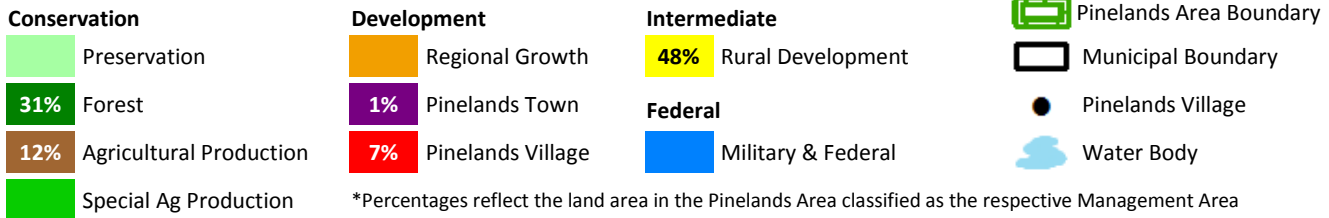
Buena Vista Township

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

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

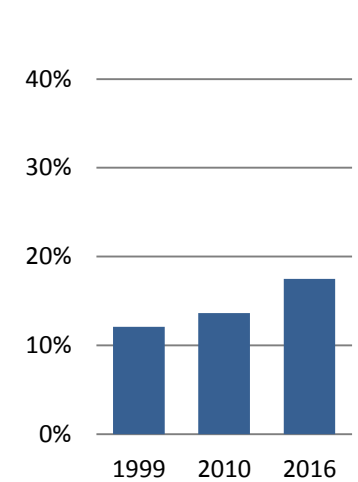


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,461	12,049	91
Population Density (per mile ²)	179	1,763	170
Population Change - 2010 to 2016	-1.5%	0.79%	139
% Land Protected in Pinelands Area*	16%	37%	36
Assessed Acres of Farmland	4467	2,408	48
Building Permits Issued	1	33	147
Housing Transactions	24	116	138
Average Home Sale Price	\$189,996	\$295,642	129
Equalized Property Value (millions)	\$590.9	\$1,499.2	108
Effective Tax Rate	2.60	2.77	118
Average Residential Property Tax Bill	\$5,098	\$6,195	132
Per Capita Income Estimate	\$26,313	\$37,580	166
Unemployment Rate	9.0%	6.1%	18

Estimated Poverty Rate by Year



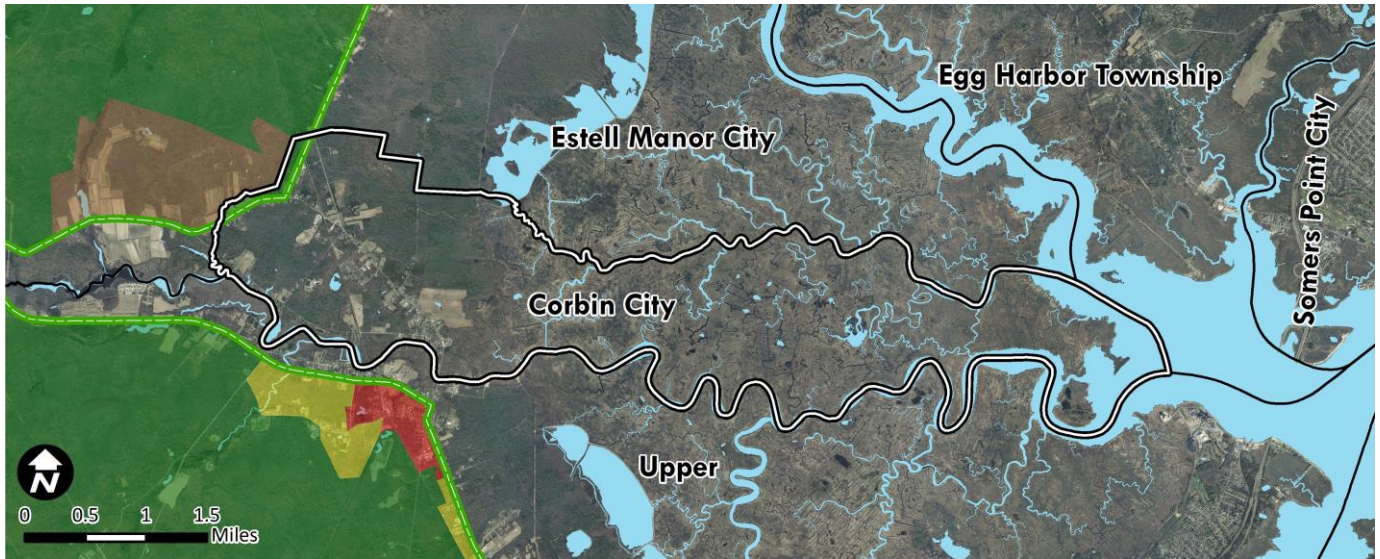
Private Sector Employment 673	Private Sector Establishments 71	Private Sector Avg. Annual Wages \$32,078
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey. It has not been updated for the 2017 LTEM report due to complications with the data.

Corbin City

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

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



Pinelands Management Areas

Conservation

- Preservation
- 100% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

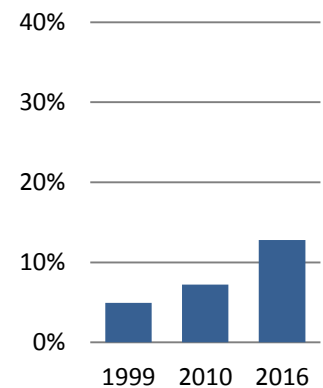
- Rural Development
- Federal**
- Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	499	12,049	197
Population Density (per mile ²)	56	1,763	192
Population Change - 2010 to 2016	1.4%	0.79%	50
% Land Protected in Pinelands Area*	9%	37%	39
Assessed Acres of Farmland	182	2,408	97
Building Permits Issued	0	33	159
Housing Transactions	1	116	198
Average Home Sale Price	\$272,000	\$295,642	63
Equalized Property Value (millions)	\$53.1	\$1,499.2	195
Effective Tax Rate	1.73	2.77	170
Average Residential Property Tax Bill	\$3,450	\$6,195	193
Per Capita Income Estimate	\$30,169	\$37,580	132
Unemployment Rate	7.5%	6.1%	35

Estimated Poverty Rate by Year



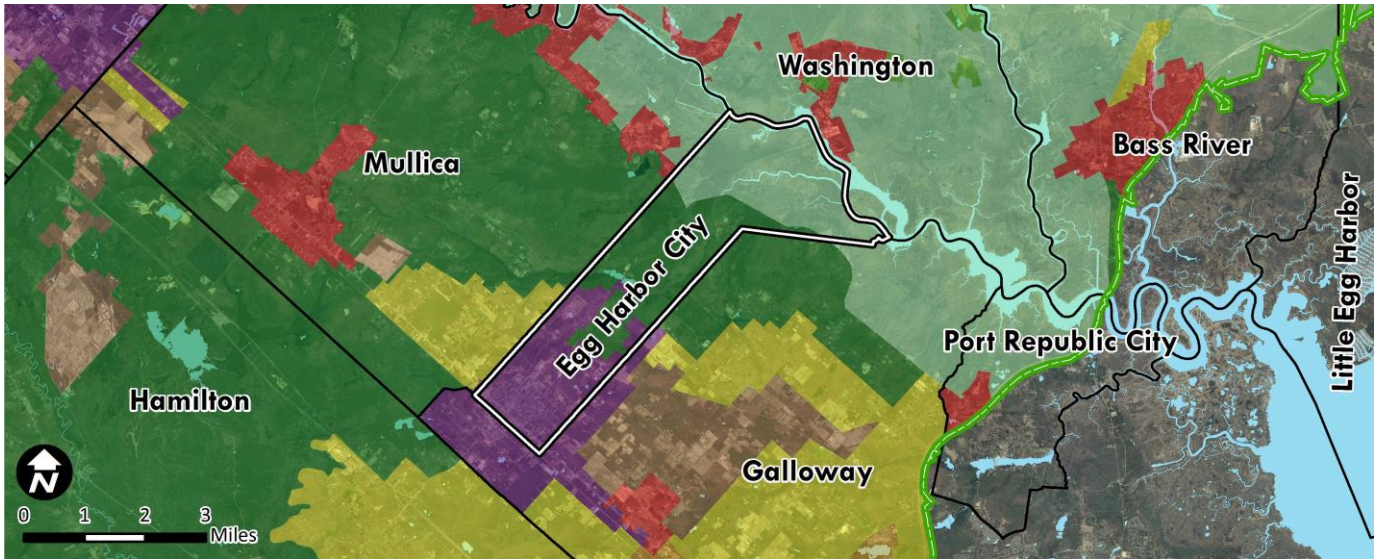
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
40	10	\$19,594

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Corbin City, it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Egg Harbor City

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

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



Pinelands Management Areas

Conservation

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

Development

- Regional Growth
- 29% Pinelands Town
- Pinelands Village

Intermediate

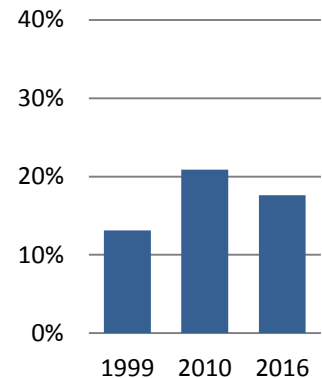
- Rural Development
- Federal**
- Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,193	12,049	122
Population Density (per mile ²)	368	1,763	144
Population Change - 2010 to 2016	-1.50%	0.79%	118
% Land Protected in Pinelands Area*	2%	37%	43
Assessed Acres of Farmland	0	2,408	124
Building Permits Issued	10	33	80
Housing Transactions	16	116	155
Average Home Sale Price	\$129,503	\$295,642	184
Equalized Property Value (millions)	\$233.7	\$1,499.2	155
Effective Tax Rate	4.34	2.77	12
Average Residential Property Tax Bill	\$6,275	\$6,195	79
Per Capita Income Estimate	\$20,525	\$37,580	188
Unemployment Rate	9.2%	6.1%	12

Estimated Poverty Rate by Year



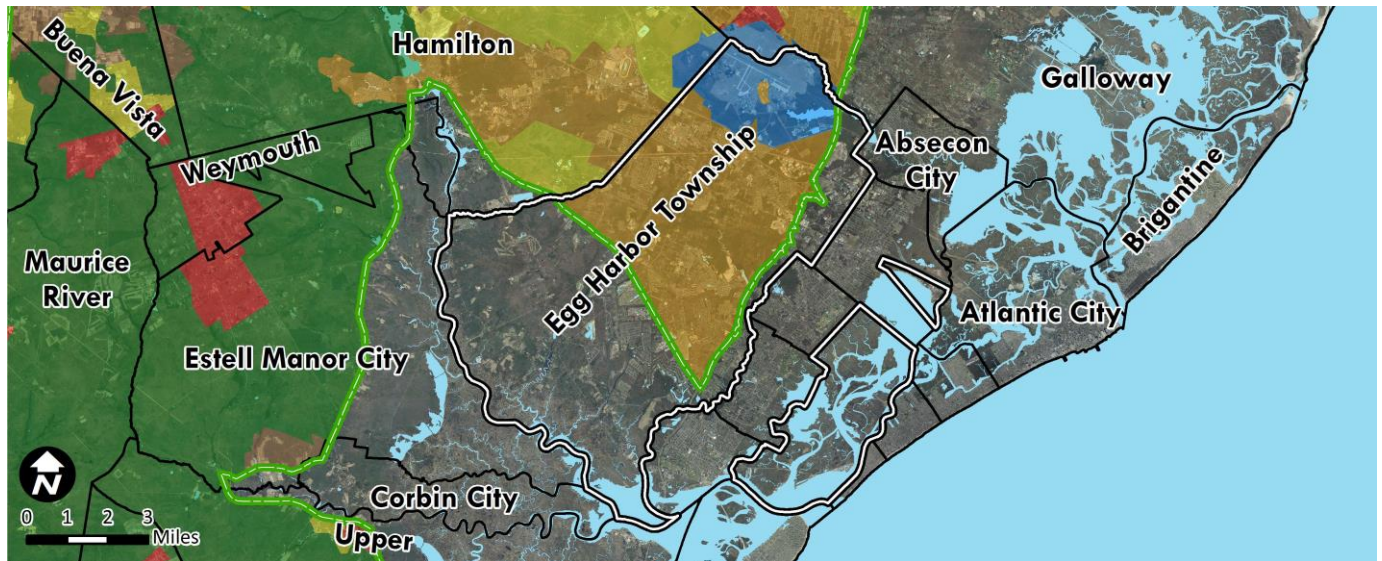
Private Sector Employment	2,515	Private Sector Establishments	236	Private Sector Avg. Annual Wages	\$34,936
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Egg Harbor City it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Egg Harbor Township

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

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



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 79% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- Rural Development

Federal

- 21% Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

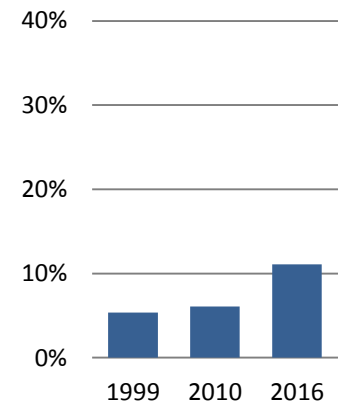


Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	43,504	12,049	12
Population Density (per mile ²)	576	1,763	128
Population Change - 2010 to 2016	0.15%	0.79%	38
% Land Protected in Pinelands Area*	2%	37%	44
Assessed Acres of Farmland	3,997	2,408	52
Building Permits Issued	108	33	13
Housing Transactions	259	116	21
Average Home Sale Price	\$206,673	\$295,642	113
Equalized Property Value (millions)	\$4,104.6	\$1,499.2	19
Effective Tax Rate	2.99	2.77	79
Average Residential Property Tax Bill	\$6,261	\$6,195	81
Per Capita Income Estimate	\$29,969	\$37,580	134
Unemployment Rate	6.7%	6.1%	59

Estimated Poverty Rate by Year



Private Sector Employment
13,452

Private Sector Establishments
882

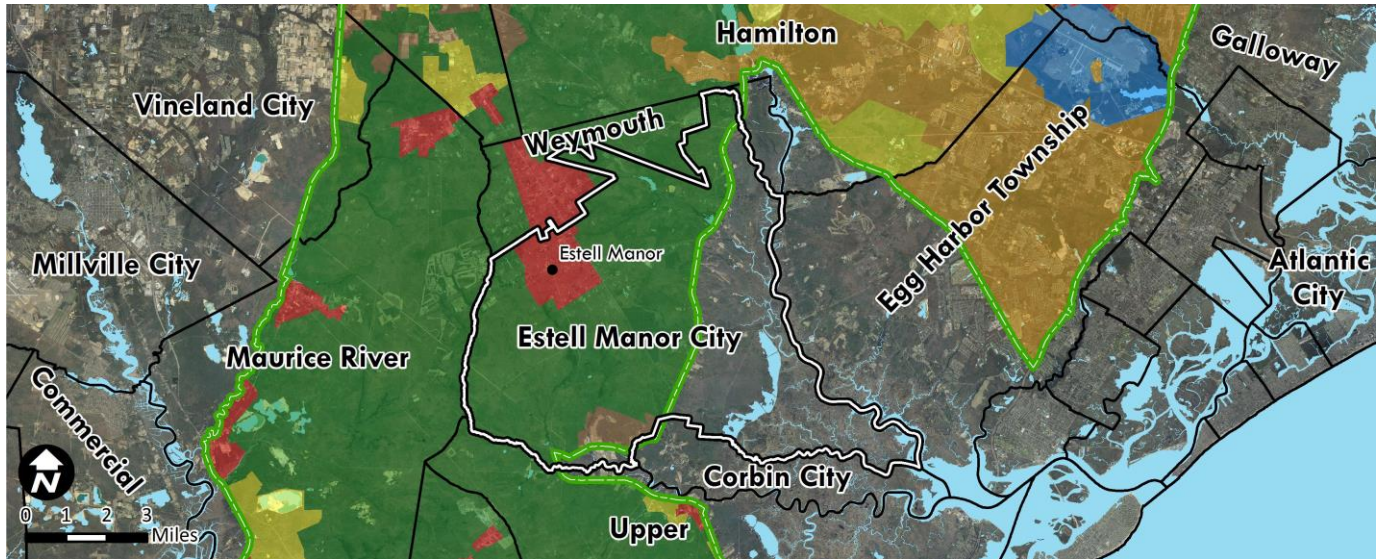
Private Sector Avg. Annual Wages
\$51,582

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Egg Harbor Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

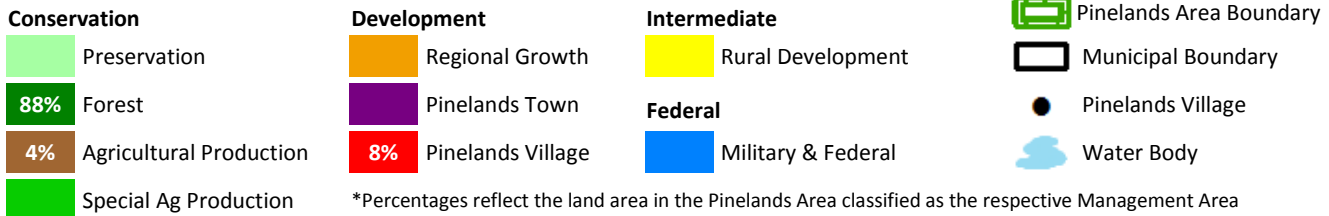
Estell Manor City

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

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

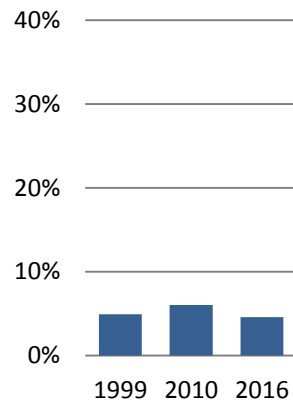


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,718	12,049	167
Population Density (per mile ²)	31	1,763	196
Population Change - 2010 to 2016	-0.81%	0.79%	70
% Land Protected in Pinelands Area*	55%	37%	17
Assessed Acres of Farmland	4,655	2,408	45
Building Permits Issued	2	33	136
Housing Transactions	14	116	161
Average Home Sale Price	\$250,529	\$295,642	75
Equalized Property Value (millions)	\$160.4	\$1,499.2	173
Effective Tax Rate	2.31	2.77	137
Average Residential Property Tax Bill	\$4,309	\$6,195	172
Per Capita Income Estimate	\$30,906	\$37,580	122
Unemployment Rate	7.7%	6.1%	32

Estimated Poverty Rate by Year



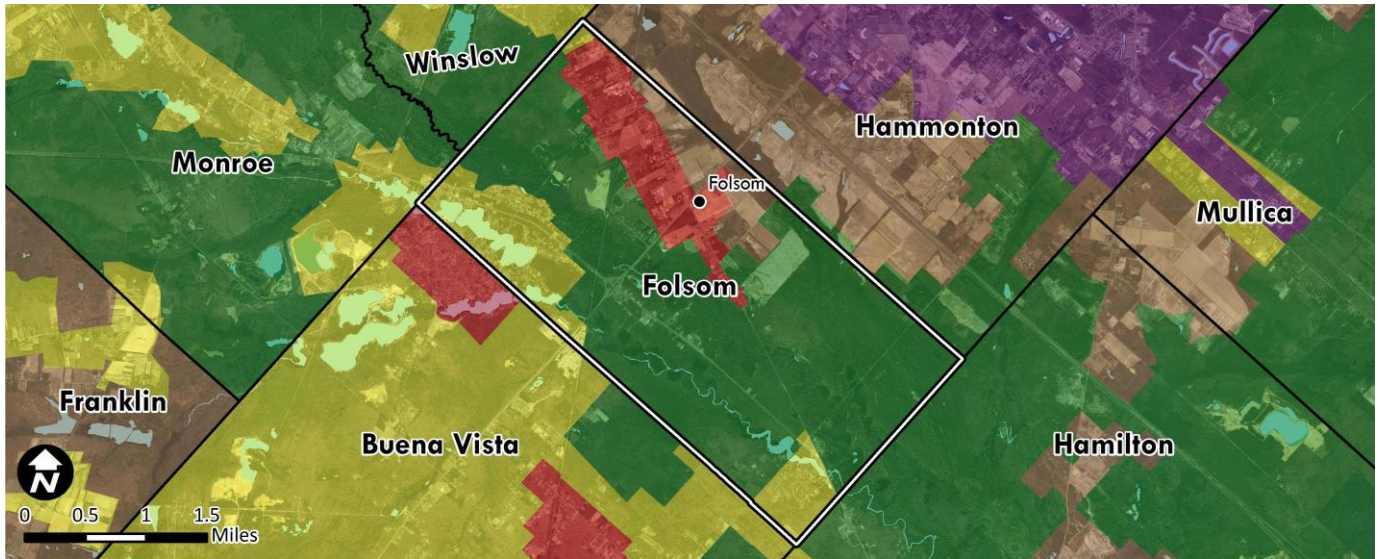
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
183	29	\$51,582

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Buena Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Folsom Borough

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

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



Pinelands Management Areas

Conservation

- Preservation
- 67% Forest
- 6% Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 12% Pinelands Village

Intermediate

- 14% Rural Development
- Federal**
- Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

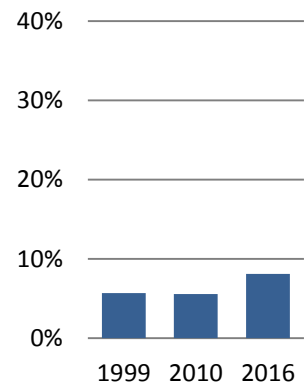


Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,824	12,049	162
Population Density (per mile ²)	215	1,763	165
Population Change - 2010 to 2016	-3.08%	0.79%	115
% Land Protected in Pinelands Area*	20%	37%	35
Assessed Acres of Farmland	731	2,408	78
Building Permits Issued	1	33	147
Housing Transactions	7	116	181
Average Home Sale Price	\$175,357	\$295,642	140
Equalized Property Value (millions)	\$172.8	\$1,499.2	172
Effective Tax Rate	1.95	2.77	163
Average Residential Property Tax Bill	\$3,769	\$6,195	189
Per Capita Income Estimate	\$28,794	\$37,580	144
Unemployment Rate	8.6%	6.1%	23

Estimated Poverty Rate by Year



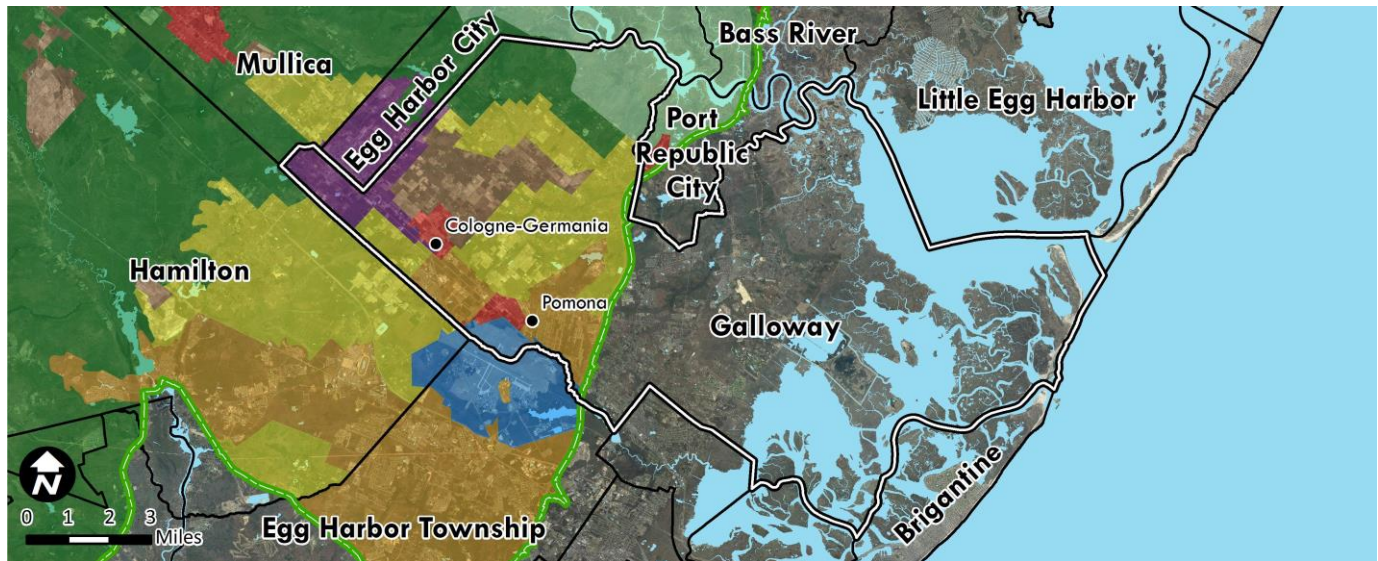
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
820	33	\$79,309

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Folsom Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

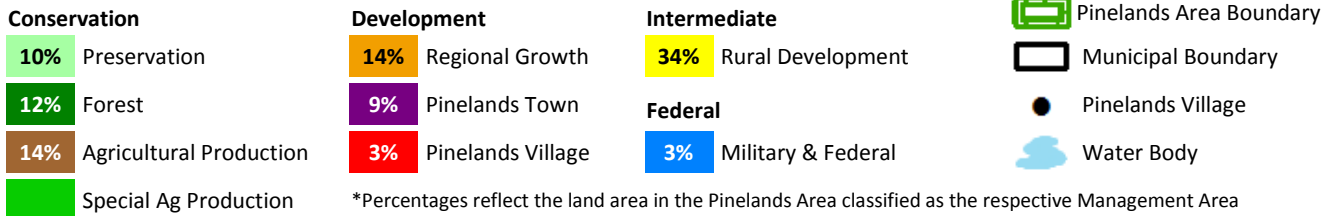
Galloway Township

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

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

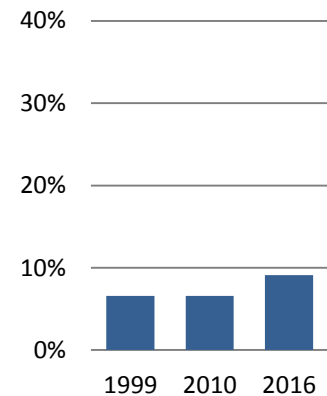


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	36,753	12,049	18
Population Density (per mile ²)	330	1,763	149
Population Change - 2010 to 2016	-1.32%	0.79%	194
% Land Protected in Pinelands Area*	14%	37%	37
Assessed Acres of Farmland	4,166	2,408	50
Building Permits Issued	29	33	50
Housing Transactions	273	116	18
Average Home Sale Price	\$175,354	\$295,642	141
Equalized Property Value (millions)	\$2,770.6	\$1,499.2	31
Effective Tax Rate	2.98	2.77	84
Average Residential Property Tax Bill	\$5,114	\$6,195	131
Per Capita Income Estimate	\$28,438	\$37,580	149
Unemployment Rate	6.6%	6.1%	66

Estimated Poverty Rate by Year



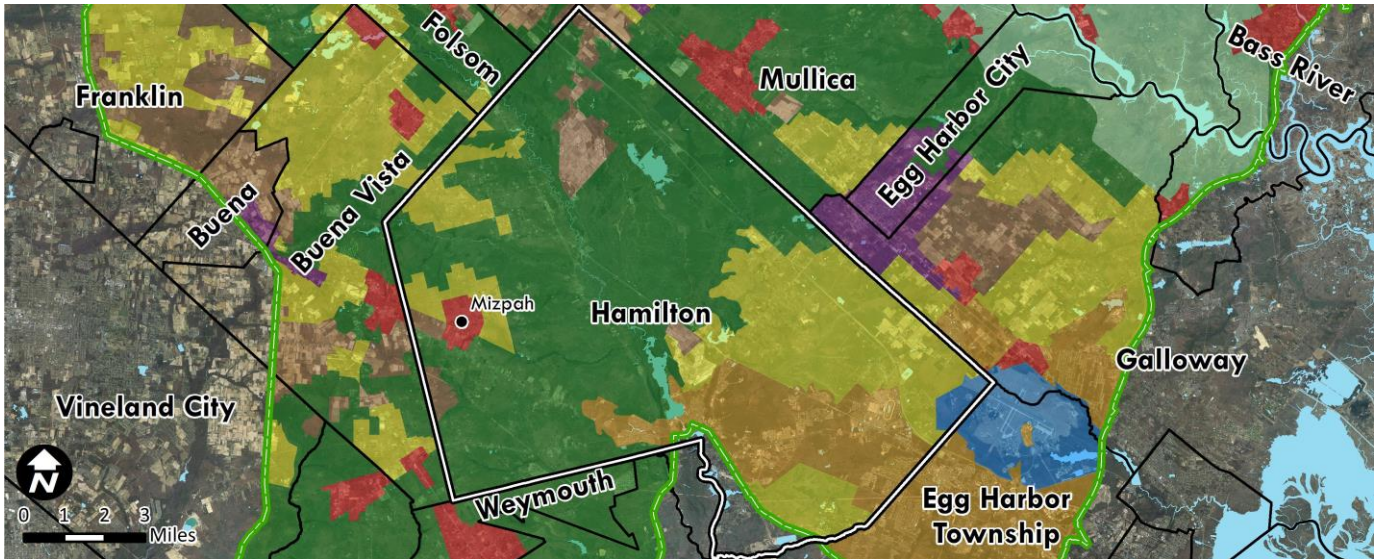
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
8,232	496	\$41,236

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Galloway Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Hamilton Township

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

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



Pinelands Management Areas

Conservation

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

Development

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

Intermediate

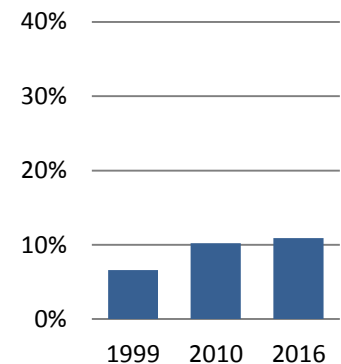
- 25% Rural Development
- Federal**
- 1% Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	26,499	12,049	27
Population Density (per mile ²)	235	1,763	159
Population Change - 2010 to 2016	-0.40%	0.79%	137
% Land Protected in Pinelands Area*	37%	37%	25
Assessed Acres of Farmland	5,955	2,408	35
Building Permits Issued	33	33	48
Housing Transactions	153	116	44
Average Home Sale Price	\$180,346	\$295,642	135
Equalized Property Value (millions)	\$2,145.1	\$1,499.2	45
Effective Tax Rate	2.91	2.77	90
Average Residential Property Tax Bill	\$4,800	\$6,195	151
Per Capita Income Estimate	\$30,296	\$37,580	129
Unemployment Rate	6.8%	6.1%	57

Estimated Poverty Rate by Year



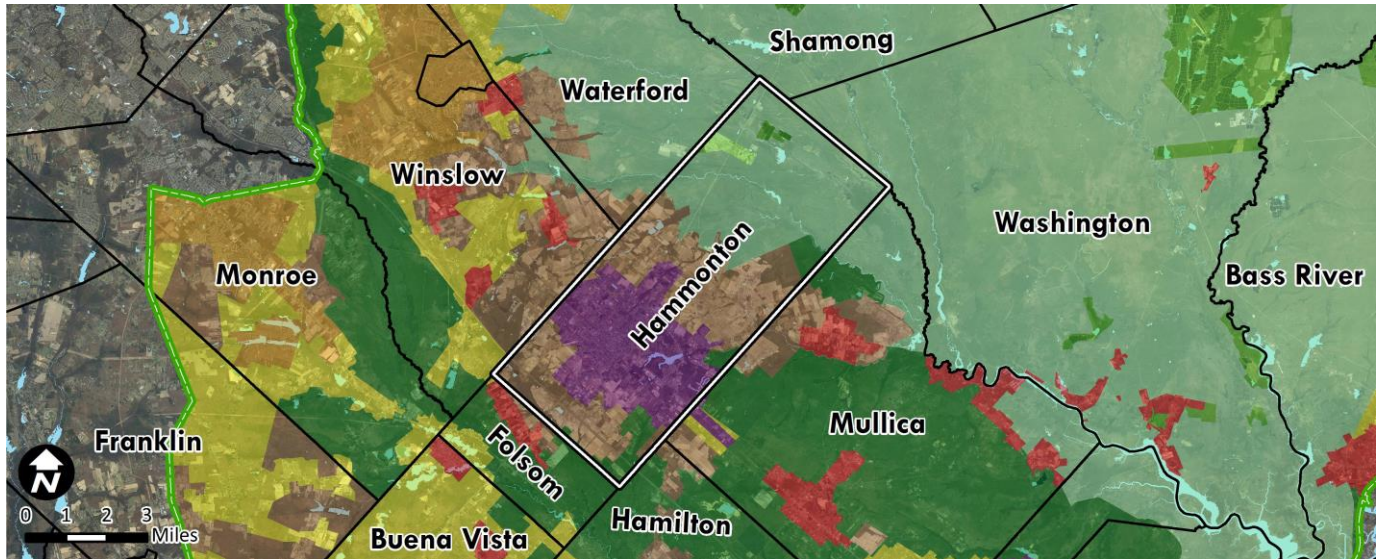
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
7,264	518	\$30,064

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Hamilton Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

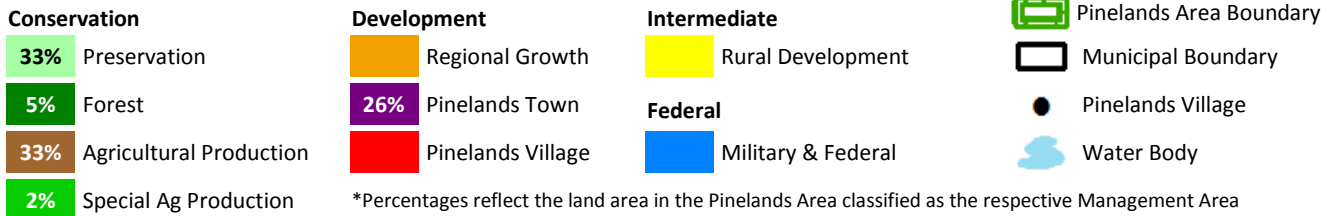
Hammonton Town

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

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

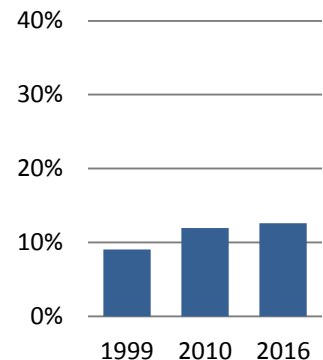


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	14,428	12,049	47
Population Density (per mile ²)	349	1,763	147
Population Change - 2010 to 2016	-2.41%	0.79%	186
% Land Protected in Pinelands Area*	49%	37%	23
Assessed Acres of Farmland	7,010	2,408	24
Building Permits Issued	6	33	101
Housing Transactions	90	116	71
Average Home Sale Price	\$201,913	\$295,642	120
Equalized Property Value (millions)	\$1,351.7	\$1,499.2	63
Effective Tax Rate	2.57	2.77	121
Average Residential Property Tax Bill	\$5,492	\$6,195	112
Per Capita Income Estimate	\$30,262	\$37,580	131
Unemployment Rate	6.9%	6.1%	51

Estimated Poverty Rate by Year



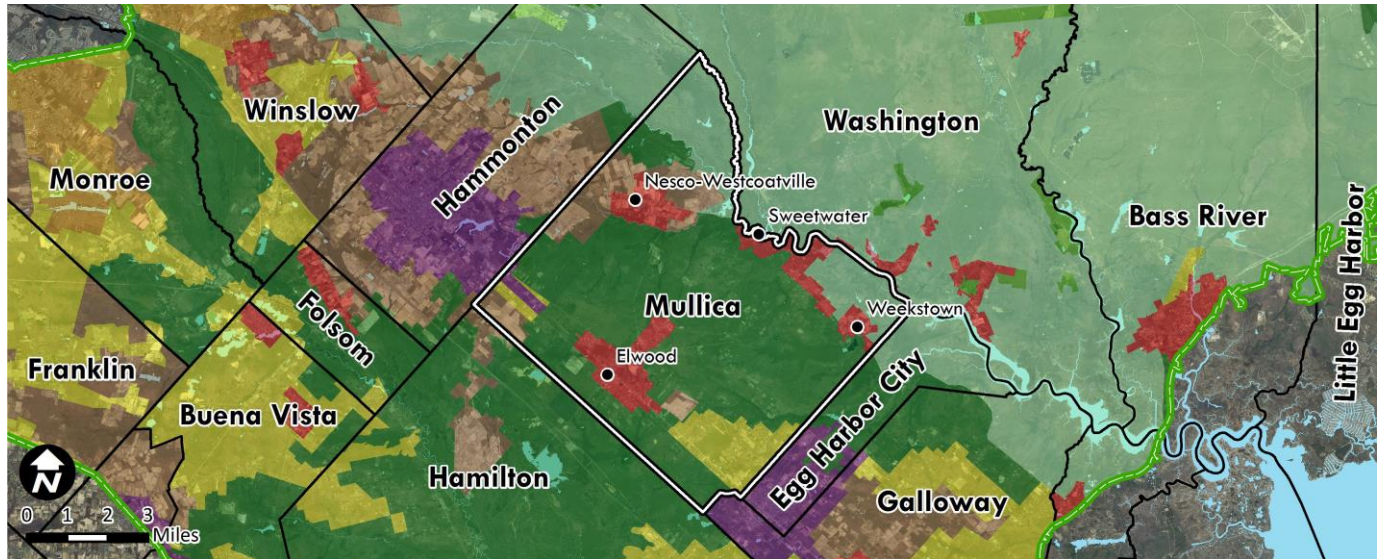
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
7,964	597	\$42,735

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For the Town of Hammonton it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Mullica Township

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

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



Pinelands Management Areas

Conservation

- 13% Preservation
- 59% Forest
- 9% Agricultural Production
- Special Ag Production

Development

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

Intermediate

- 7% Rural Development
- Federal**
- Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

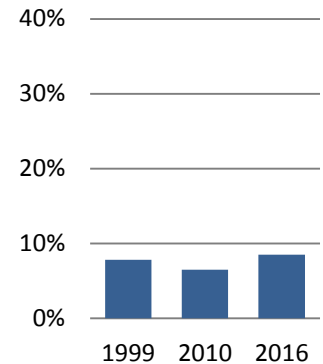


Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,041	12,049	103
Population Density (per mile ²)	106	1,763	181
Population Change - 2010 to 2016	-1.68%	0.79%	135
% Land Protected in Pinelands Area*	33*	37%	28
Assessed Acres of Farmland	6,470	2,408	31
Building Permits Issued	7	33	95
Housing Transactions	22	116	143
Average Home Sale Price	\$240,241	\$295,642	83
Equalized Property Value (millions)	\$481.4	\$1,499.2	118
Effective Tax Rate	2.68	2.77	111
Average Residential Property Tax Bill	\$5,132	\$6,195	130
Per Capita Income Estimate	\$31,622	\$37,580	109
Unemployment Rate	9.2%	6.1%	12

Estimated Poverty Rate by Year



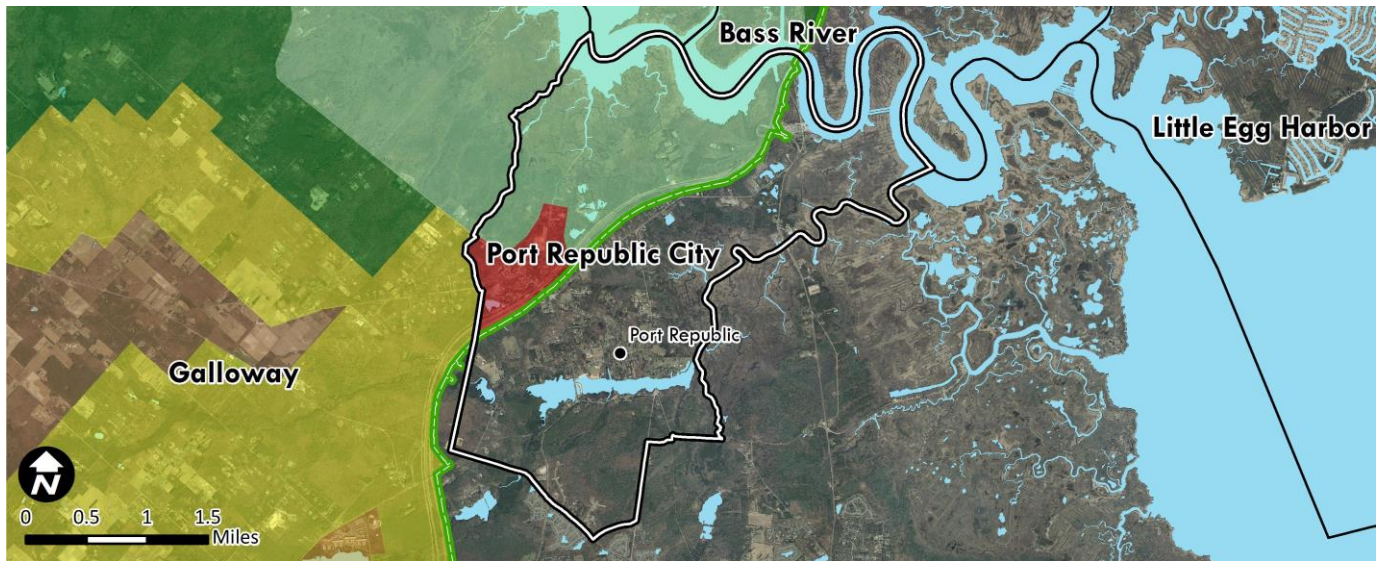
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
101	25	\$25,769

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Mullica Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Port Republic City

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

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



Pinelands Management Areas

Conservation

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

Development

- Regional Growth
- Pinelands Town
- 16% Pinelands Village

Intermediate

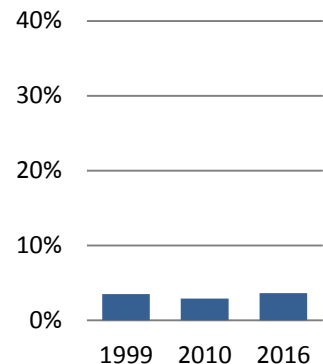
- Rural Development
- Federal**
- Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,085	12,049	182
Population Density (per mile ²)	127	1,763	178
Population Change - 2010 to 2016	-2.60%	0.79%	83
% Land Protected in Pinelands Area*	29%	37%	32
Assessed Acres of Farmland	72	2,408	107
Building Permits Issued	4	33	120
Housing Transactions	6	116	183
Average Home Sale Price	\$355,383	\$295,642	30
Equalized Property Value (millions)	\$123.4	\$1,499.2	182
Effective Tax Rate	2.35	2.77	135
Average Residential Property Tax Bill	\$5,857	\$6,195	102
Per Capita Income Estimate	\$44,574	\$37,580	29
Unemployment Rate	7.5%	6.1%	35

Estimated Poverty Rate by Year



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
31	19	\$25,709

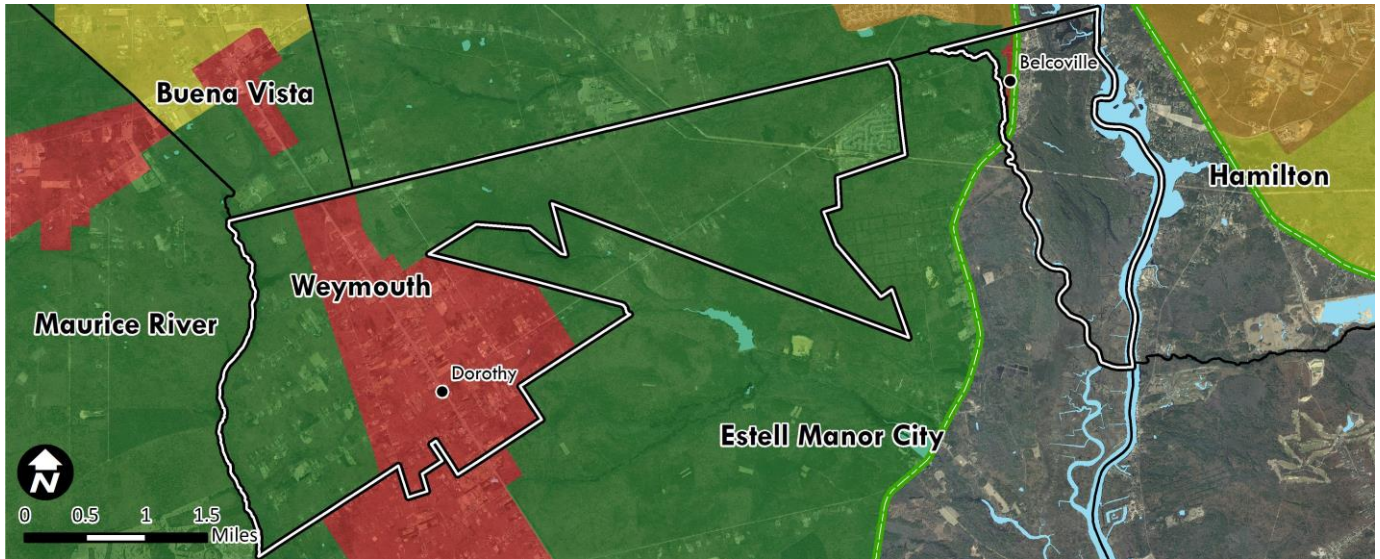
* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For the City of Port Republic it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Weymouth Township



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

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



Pinelands Management Areas

Conservation

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

Development

- Regional Growth
- Pinelands Town
- 30% Pinelands Village

Intermediate

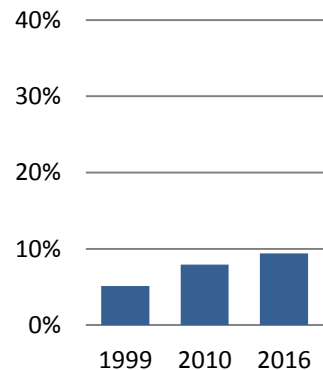
- Rural Development
- Federal**
- Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,788	12,049	147
Population Density (per mile ²)	229	1,763	161
Population Change - 2010 to 2016	2.80%	0.79%	34
% Land Protected in Pinelands Area*	8%	37%	40
Assessed Acres of Farmland	86	2,408	106
Building Permits Issued	1	33	147
Housing Transactions	6	116	183
Average Home Sale Price	\$211,250	\$295,642	108
Equalized Property Value (millions)	\$183.6	\$1,499.2	169
Effective Tax Rate	2.09	2.77	156
Average Residential Property Tax Bill	\$4,567	\$6,195	162
Per Capita Income Estimate	\$29,224	\$37,580	140
Unemployment Rate	7.0%	6.1%	47

Estimated Poverty Rate by Year



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
142	23	\$41,640

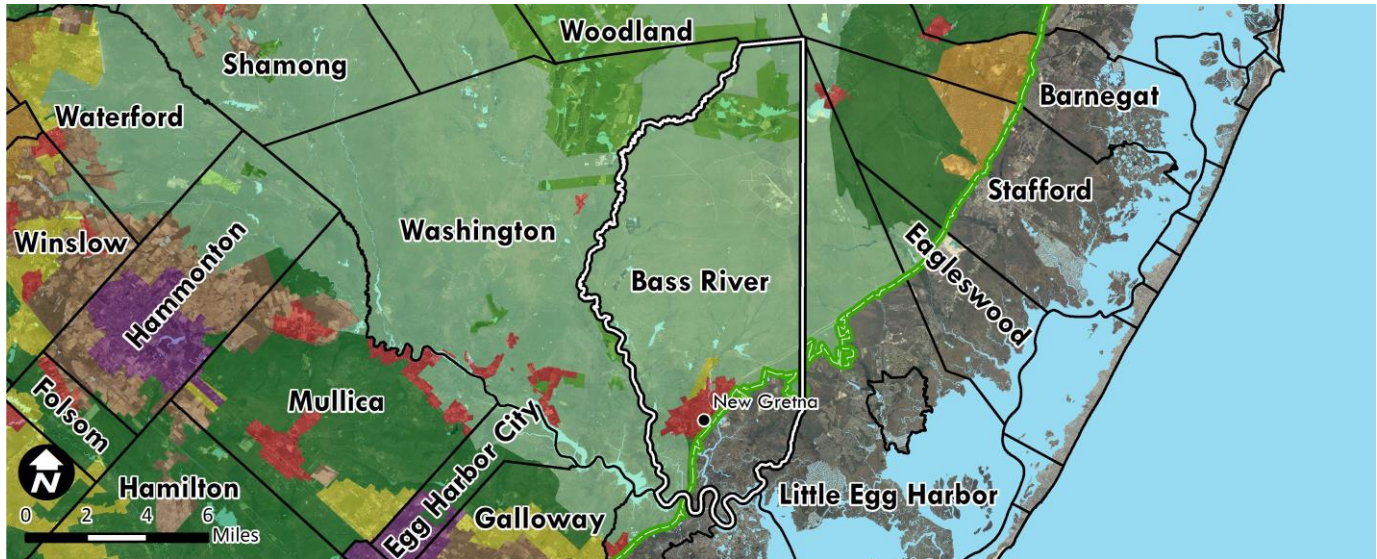
*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey. It has not been updated for the 2017 LTEM report due to complications with the data.

Bass River Township

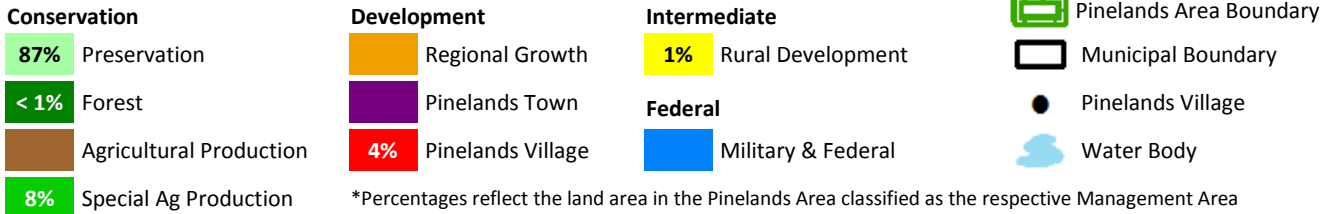


Pinelands Area 2010 population: 1,172 (81% of total population)

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

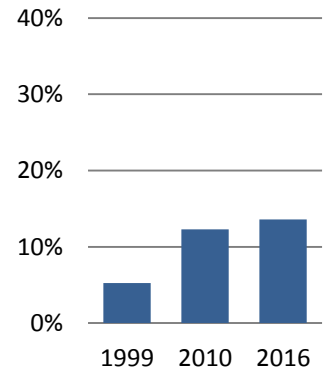


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,443	12,049	174
Population Density (per mile ²)	18	1,763	200
Population Change - 2010 to 2016	-0.21%	0.79%	62
% Land Protected in Pinelands Area*	51%	37%	19
Assessed Acres of Farmland	7,069	2,408	23
Building Permits Issued	1	33	147
Housing Transactions	6	116	183
Average Home Sale Price	\$287,750	\$295,642	53
Equalized Property Value (millions)	\$175.0	\$1,499.2	170
Effective Tax Rate	2.13	2.77	152
Average Residential Property Tax Bill	\$4,829	\$6,195	150
Per Capita Income Estimate	\$31,450	\$37,580	112
Unemployment Rate	7.5%	6.1%	35

Estimated Poverty Rate by Year



Private Sector Employment

Private Sector Establishments

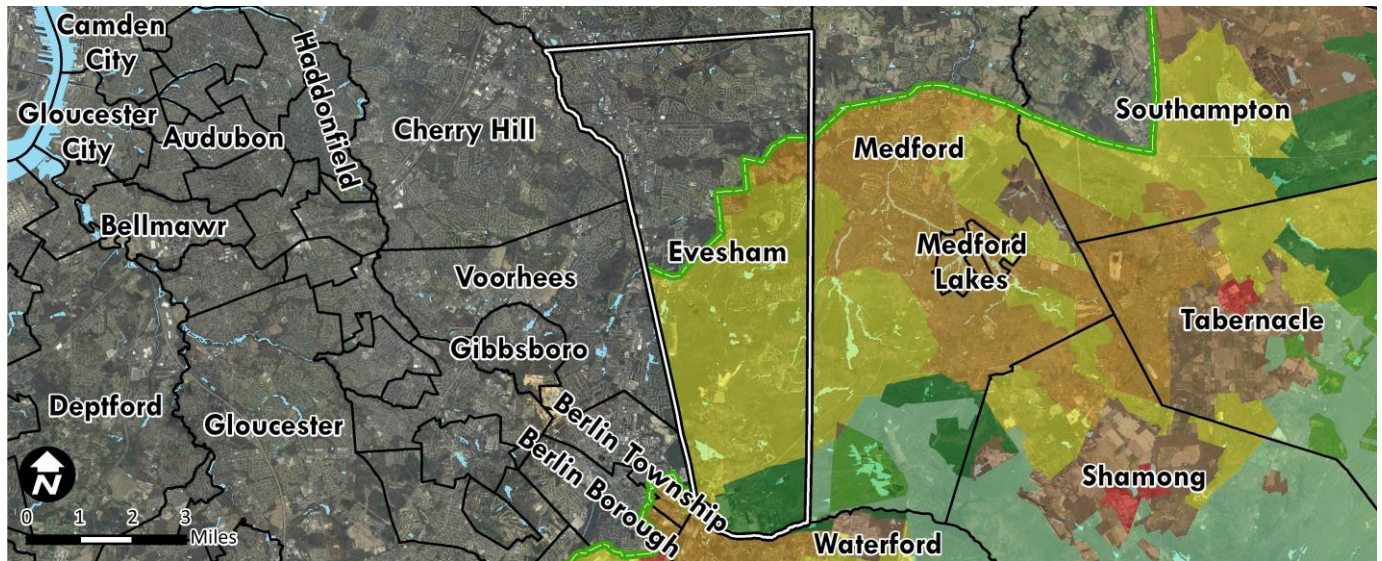
Private Sector Avg. Annual Wages
\$-

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Bass River Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

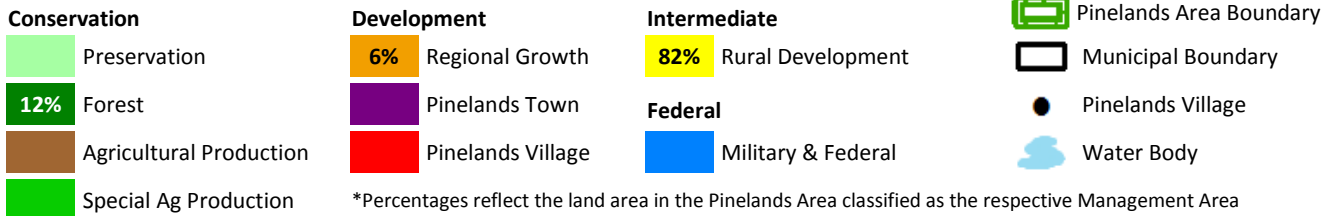
Evesham Township

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

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

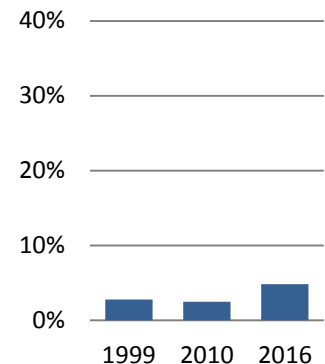


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	45,351	12,049	10
Population Density (per mile ²)	1,533	1,763	87
Population Change - 2010 to 2016	-0.49%	0.79%	173
% Land Protected in Pinelands Area*	30%	37%	30
Assessed Acres of Farmland	2,277	2,408	61
Building Permits Issued	77	33	22
Housing Transactions	447	116	12
Average Home Sale Price	\$269,343	\$295,642	67
Equalized Property Value (millions)	\$5,244.0	\$1,499.2	12
Effective Tax Rate	2.64	2.77	115
Average Residential Property Tax Bill	\$7,153	\$6,195	46
Per Capita Income Estimate	\$43,130	\$37,580	37
Unemployment Rate	3.6%	6.1%	190

Estimated Poverty Rate by Year



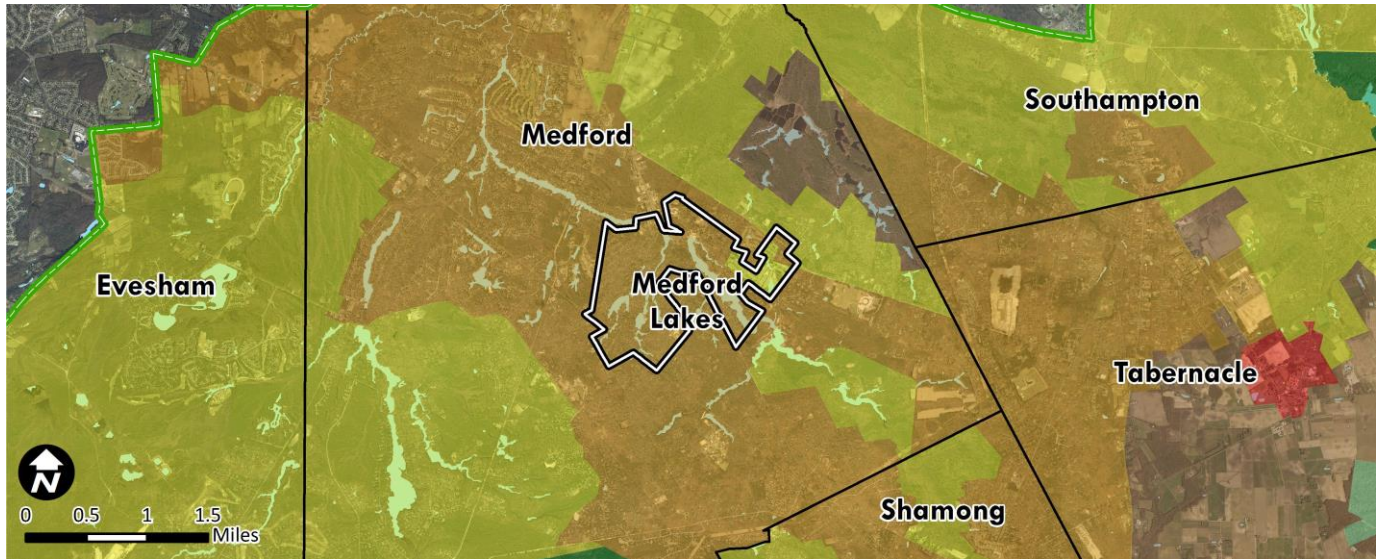
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
29,181	1,449	\$47,530

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Evesham Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

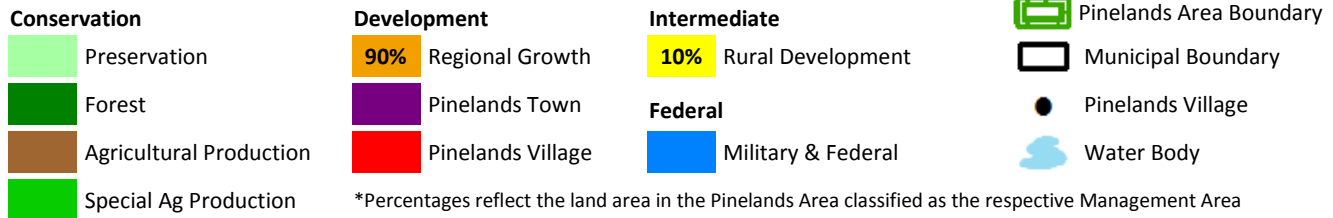
Medford Lakes Borough

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

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

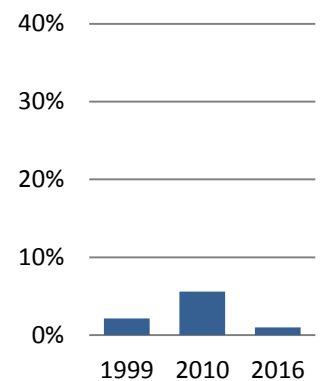


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	4,053	12,049	124
Population Density (per mile ²)	3,217	1,763	42
Population Change - 2010 to 2016	-2.22%	0.79%	134
% Land Protected in Pinelands Area*	0%	37%	46
Assessed Acres of Farmland	0	2,408	124
Building Permits Issued	5	33	111
Housing Transactions	44	116	109
Average Home Sale Price	\$292,998	\$295,642	51
Equalized Property Value (millions)	\$453.9	\$1,499.2	123
Effective Tax Rate	2.99	2.77	81
Average Residential Property Tax Bill	\$8,614	\$6,195	21
Per Capita Income Estimate	\$47,373	\$37,580	23
Unemployment Rate	3.6%	6.1%	190

Estimated Poverty Rate by Year



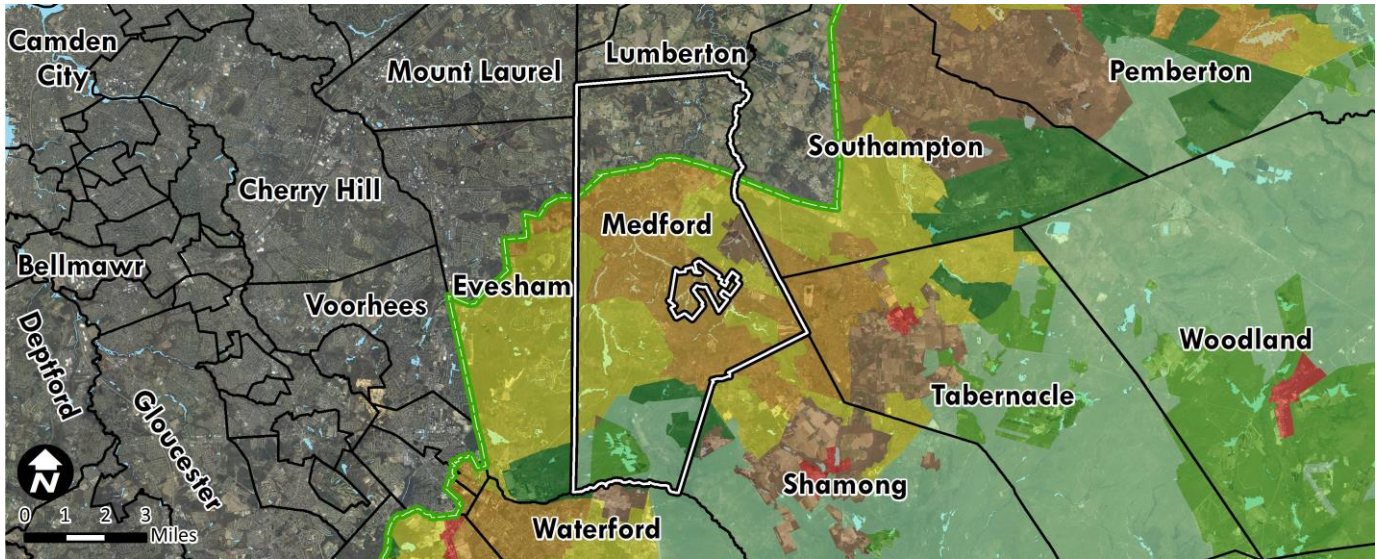
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
374	72	\$28,183

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Medford Lakes Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

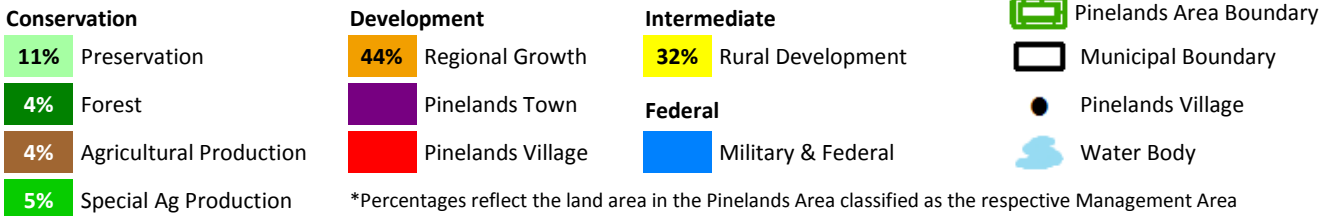
Medford Township

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

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

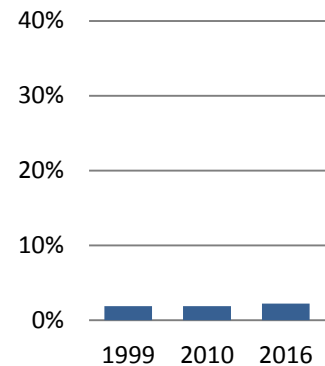


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	23,440	12,049	29
Population Density (per mile ²)	589	1,763	125
Population Change - 2010 to 2016	1.62%	0.79%	22
% Land Protected in Pinelands Area*	32%	37%	29
Assessed Acres of Farmland	5,678	2,408	36
Building Permits Issued	67	33	30
Housing Transactions	254	116	22
Average Home Sale Price	\$360,872	\$295,642	29
Equalized Property Value (millions)	\$3,276.2	\$1,499.2	28
Effective Tax Rate	2.82	2.77	101
Average Residential Property Tax Bill	\$10,127	\$6,195	10
Per Capita Income Estimate	\$51,713	\$37,580	16
Unemployment Rate	3.4%	6.1%	195

Estimated Poverty Rate by Year



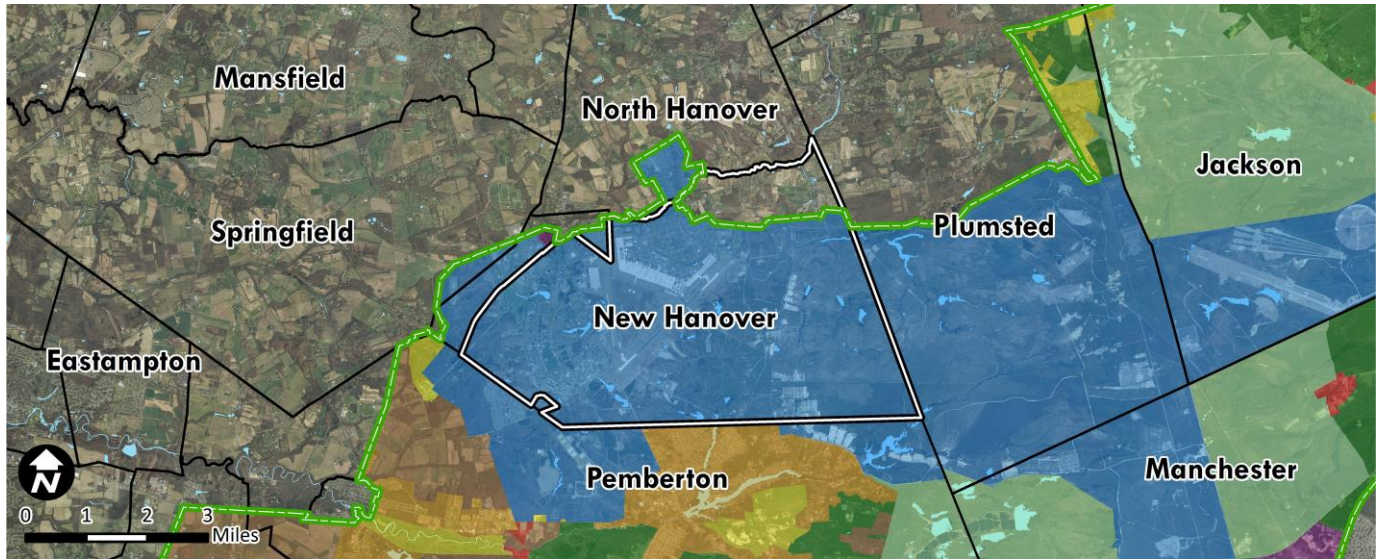
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
6,868	738	\$39,577

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Medford Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

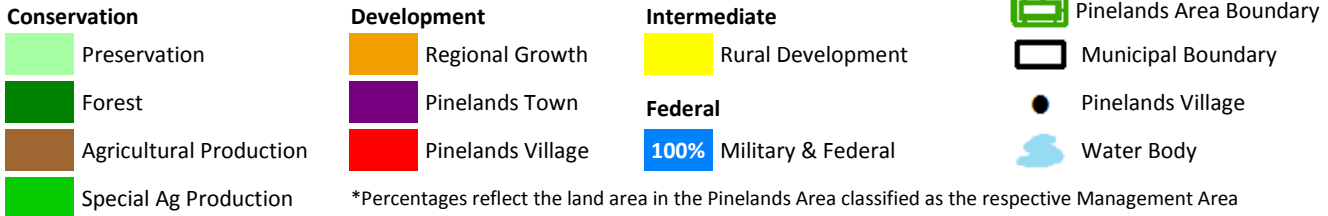
New Hanover Township

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

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

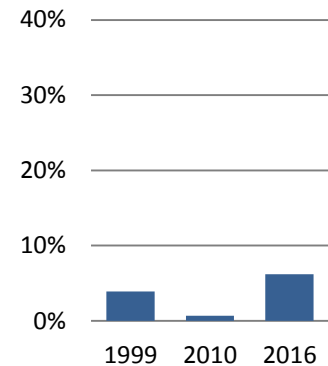


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	8,129	12,049	83
Population Density (per mile ²)	359	1,763	146
Population Change - 2010 to 2016	9.56%	0.79%	10
% Land Protected in Pinelands Area*	0%	37%	46
Assessed Acres of Farmland	908	2,408	72
Building Permits Issued	10	33	80
Housing Transactions	9	116	168
Average Home Sale Price	\$257,208	\$295,642	71
Equalized Property Value (millions)	\$86.2	\$1,499.2	191
Effective Tax Rate	1.73	2.77	171
Average Residential Property Tax Bill	\$4,413	\$6,195	168
Per Capita Income Estimate	\$16,124	\$37,580	197
Unemployment Rate	7.6%	6.1%	33

Estimated Poverty Rate by Year



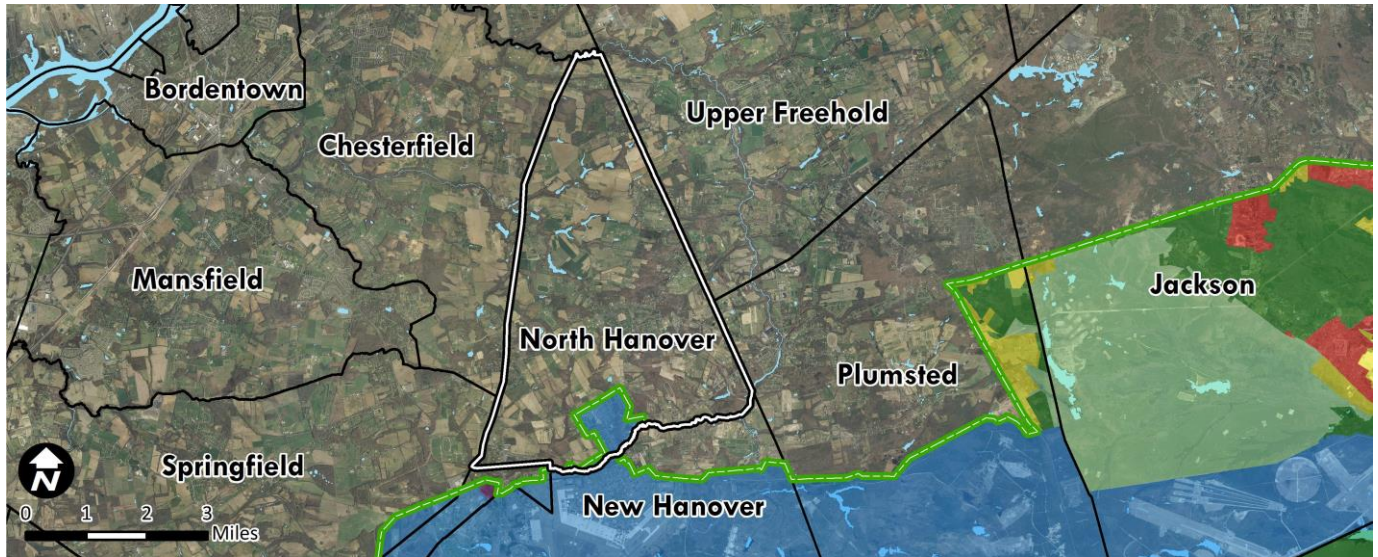
Private Sector Employment 905	Private Sector Establishments 111	Private Sector Avg. Annual Wages \$46,734
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For New Hanover Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

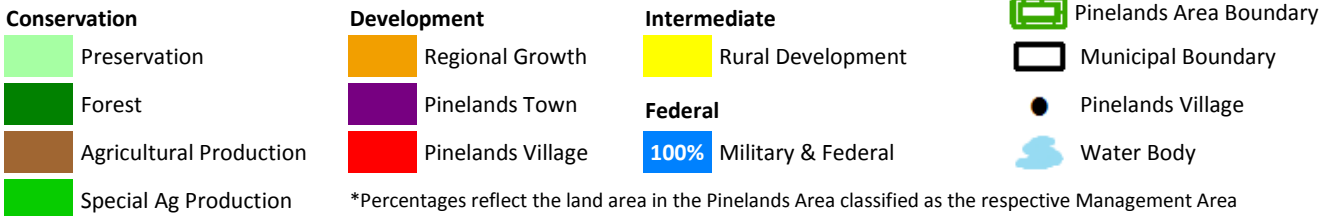
North Hanover Township

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

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

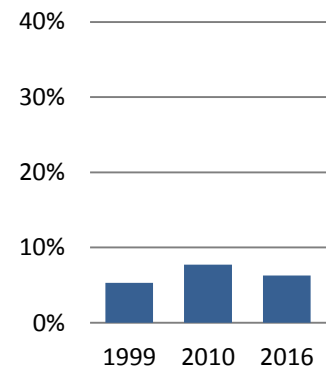


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,581	12,049	87
Population Density (per mile ²)	433	1,763	139
Population Change - 2010 to 2016	-1.52%	0.79%	143
% Land Protected in Pinelands Area*	0%	37%	46
Assessed Acres of Farmland	7,082	2,408	22
Building Permits Issued	13	33	75
Housing Transactions	17	116	152
Average Home Sale Price	\$338,838	\$295,642	35
Equalized Property Value (millions)	\$420.6	\$1,499.2	128
Effective Tax Rate	2.10	2.77	155
Average Residential Property Tax Bill	\$6,524	\$6,195	71
Per Capita Income Estimate	\$23,514	\$37,580	182
Unemployment Rate	5.4%	6.1%	108

Estimated Poverty Rate by Year



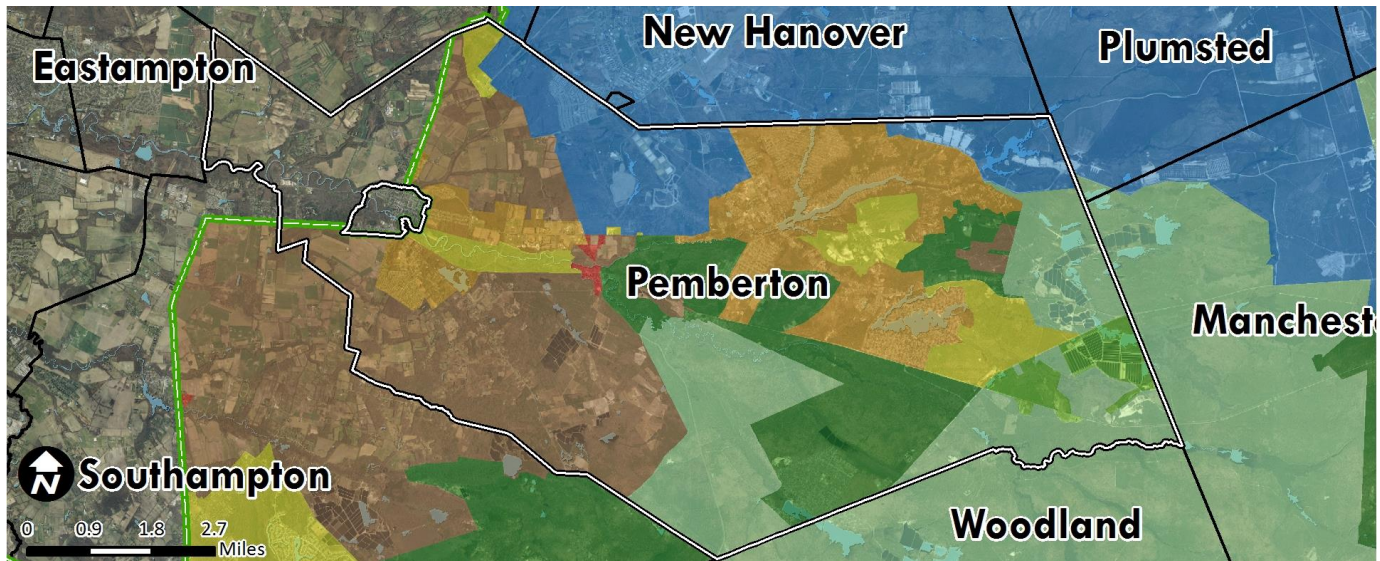
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
571	68	\$47,199

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For North Hanover Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

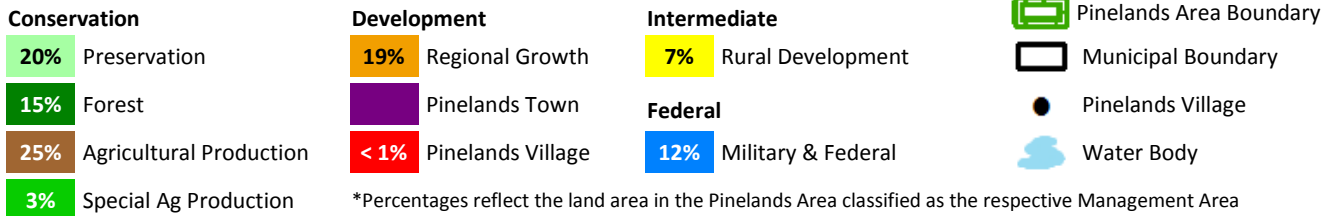
Pemberton Township

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

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

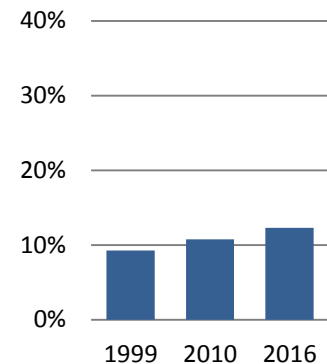


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	27,567	12,049	25
Population Density (per mile ²)	439	1,763	137
Population Change - 2010 to 2016	-1.33%	0.79%	189
% Land Protected in Pinelands Area*	42%	37%	24
Assessed Acres of Farmland	10,819	2,408	12
Building Permits Issued	2	33	136
Housing Transactions	138	116	50
Average Home Sale Price	\$167,670	\$295,642	152
Equalized Property Value (millions)	\$1,447.8	\$1,499.2	58
Effective Tax Rate	2.28	2.77	141
Average Residential Property Tax Bill	\$3,627	\$6,195	192
Per Capita Income Estimate	\$26,163	\$37,580	168
Unemployment Rate	6.5%	6.1%	70

Estimated Poverty Rate by Year



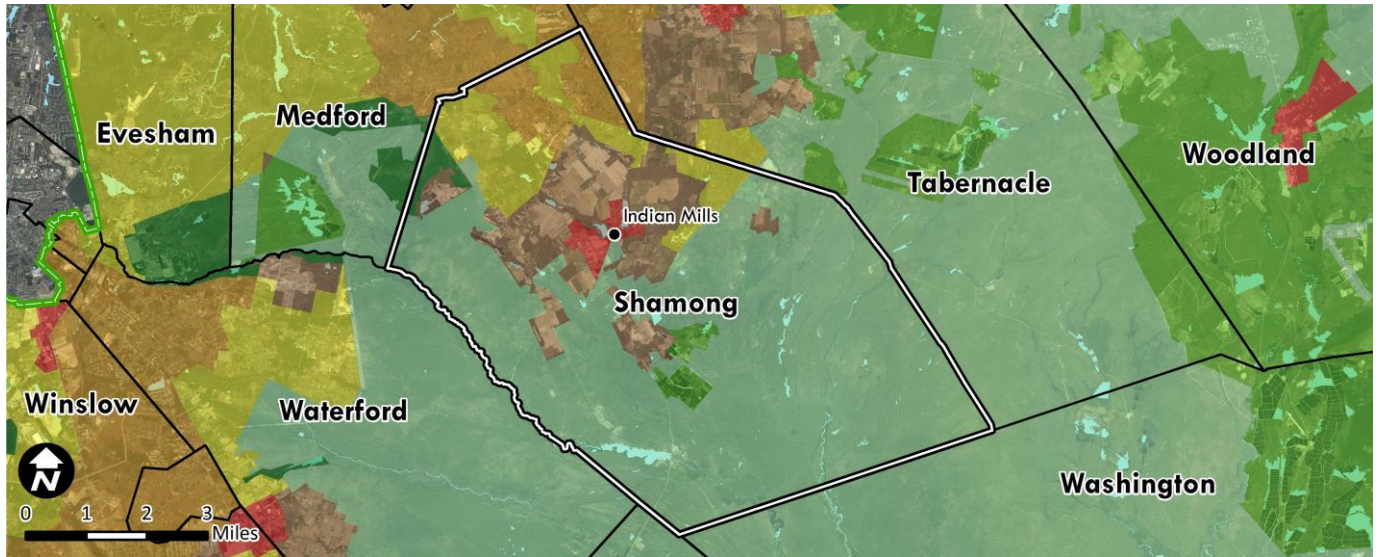
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
2,365	208	\$52,021

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Pemberton Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Shamong Township

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

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



Pinelands Management Areas

Conservation

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

Development

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

Intermediate

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



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

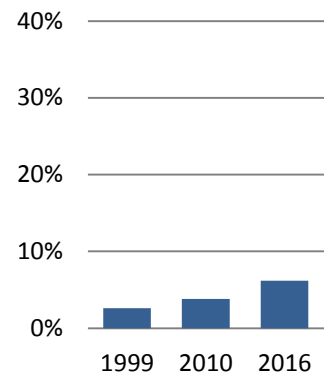


Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,453	12,049	98
Population Density (per mile ²)	143	1,763	174
Population Change - 2010 to 2016	-1.30%	0.79%	127
% Land Protected in Pinelands Area*	66%	37%	12
Assessed Acres of Farmland	4,936	2,408	42
Building Permits Issued	7	33	95
Housing Transactions	47	116	106
Average Home Sale Price	\$342,570	\$295,642	34
Equalized Property Value (millions)	\$700.9	\$1,499.2	100
Effective Tax Rate	2.59	2.77	120
Average Residential Property Tax Bill	\$8,430	\$6,195	22
Per Capita Income Estimate	\$38,008	\$37,580	56
Unemployment Rate	4.3%	6.1%	166

Estimated Poverty Rate by Year



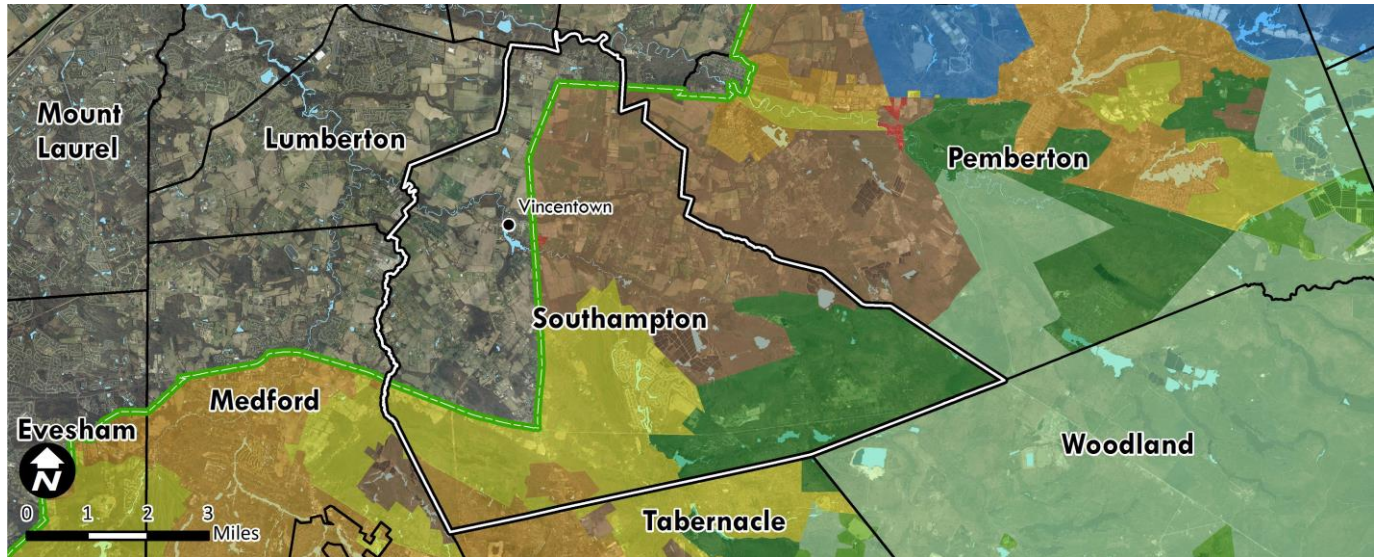
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
992	121	\$42,239

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Shamong Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

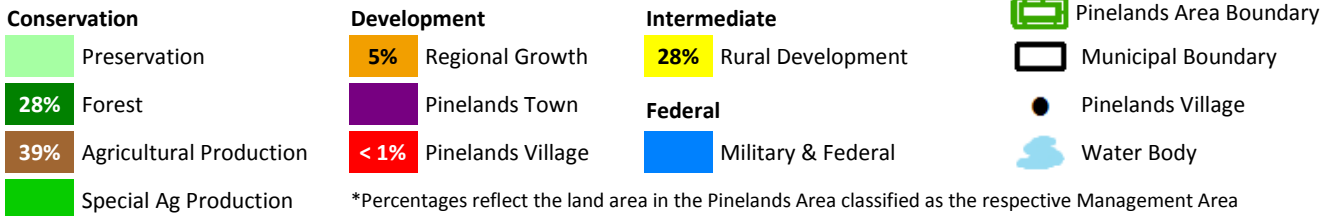
Southampton Township

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

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

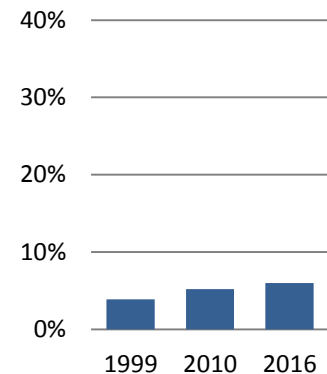


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	10,235	12,049	66
Population Density (per mile ²)	231	1,763	160
Population Change - 2010 to 2016	-1.98%	0.79%	167
% Land Protected in Pinelands Area*	35%	37%	26
Assessed Acres of Farmland	14,263	2,408	4
Building Permits Issued	5	33	111
Housing Transactions	138	116	50
Average Home Sale Price	\$213,444	\$295,642	106
Equalized Property Value (millions)	\$1,104.6	\$1,499.2	80
Effective Tax Rate	2.49	2.77	127
Average Residential Property Tax Bill	\$5,283	\$6,195	124
Per Capita Income Estimate	\$35,939	\$37,580	75
Unemployment Rate	5.3%	6.1%	113

Estimated Poverty Rate by Year



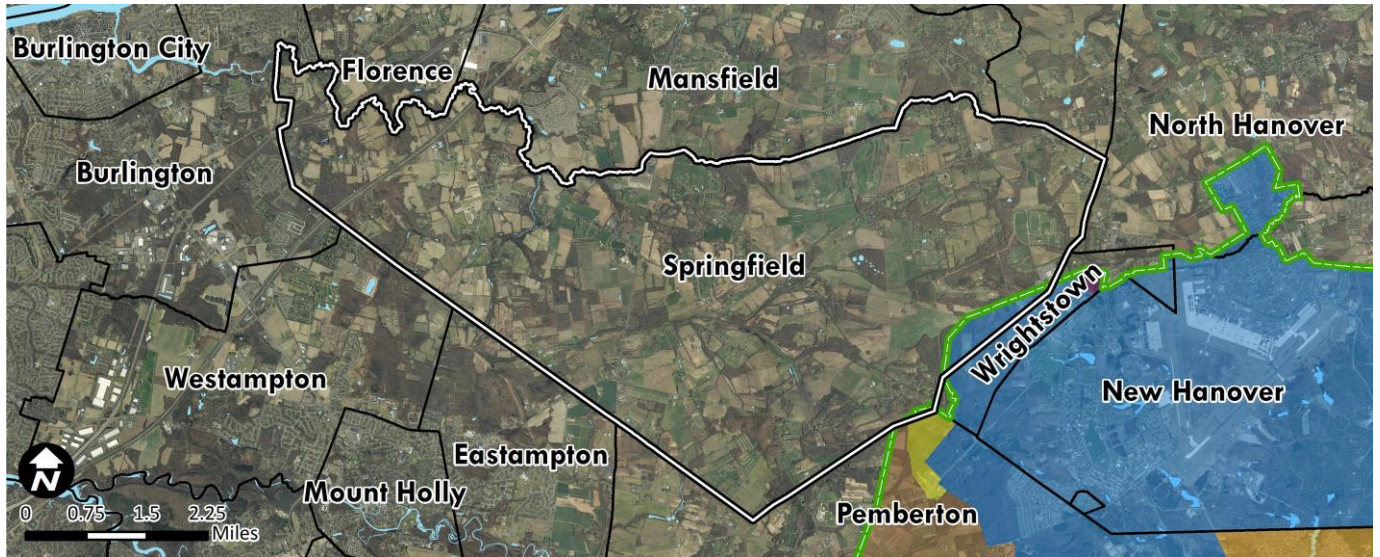
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
2,327	230	\$41,368

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Southampton Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Springfield Township

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

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



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- Rural Development
- Federal**
- 100% Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

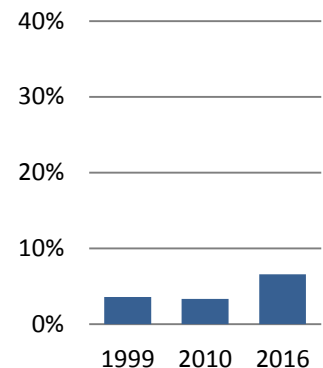


Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	3,315	12,049	136
Population Density (per mile ²)	112	1,763	180
Population Change - 2010 to 2016	-2.53%	0.79%	129
% Land Protected in Pinelands Area*	0%	37%	46
Assessed Acres of Farmland	12,855	2,408	9
Building Permits Issued	4	33	120
Housing Transactions	33	116	123
Average Home Sale Price	\$334,482	\$295,642	36
Equalized Property Value (millions)	\$419.6	\$1,499.2	129
Effective Tax Rate	2.71	2.77	106
Average Residential Property Tax Bill	\$8,123	\$6,195	28
Per Capita Income Estimate	\$41,140	\$37,580	41
Unemployment Rate	3.8%	6.1%	180

Estimated Poverty Rate by Year



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
318	43	\$40,358

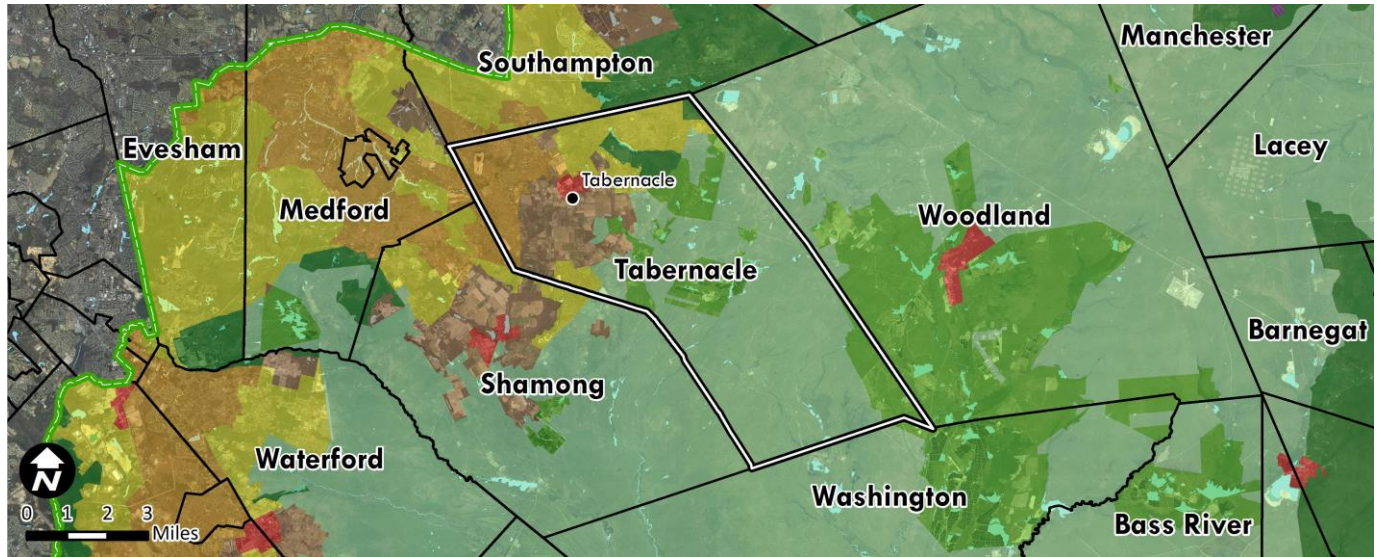
* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Springfield Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Tabernacle Township

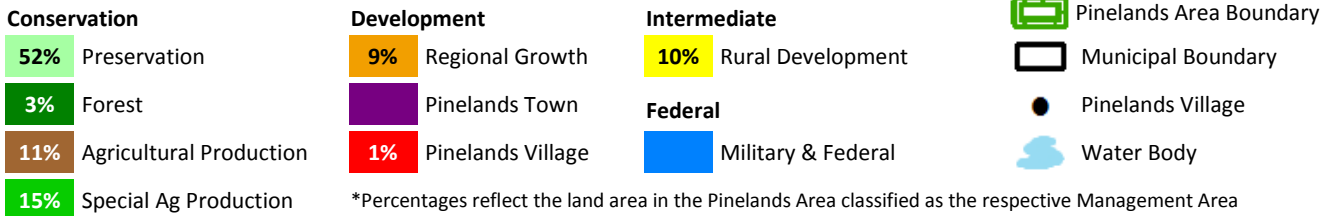


Pinelands Area 2010 population: 6,949 (100% of total population)

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

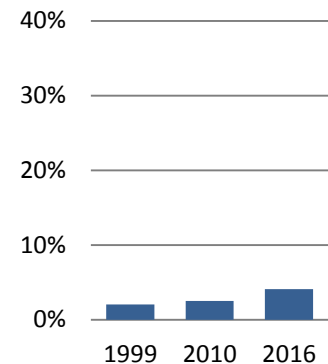


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,892	12,049	94
Population Density (per mile ²)	139	1,763	176
Population Change - 2010 to 2016	-1.22%	0.79%	127
% Land Protected in Pinelands Area*	61%	37%	15
Assessed Acres of Farmland	10,725	2,408	14
Building Permits Issued	0	33	159
Housing Transactions	48	116	105
Average Home Sale Price	\$324,369	\$295,642	38
Equalized Property Value (millions)	\$713.4	\$1,499.2	98
Effective Tax Rate	2.57	2.77	122
Average Residential Property Tax Bill	\$7,334	\$6,195	43
Per Capita Income Estimate	\$37,144	\$37,580	60
Unemployment Rate	4.7%	6.1%	148

Estimated Poverty Rate by Year



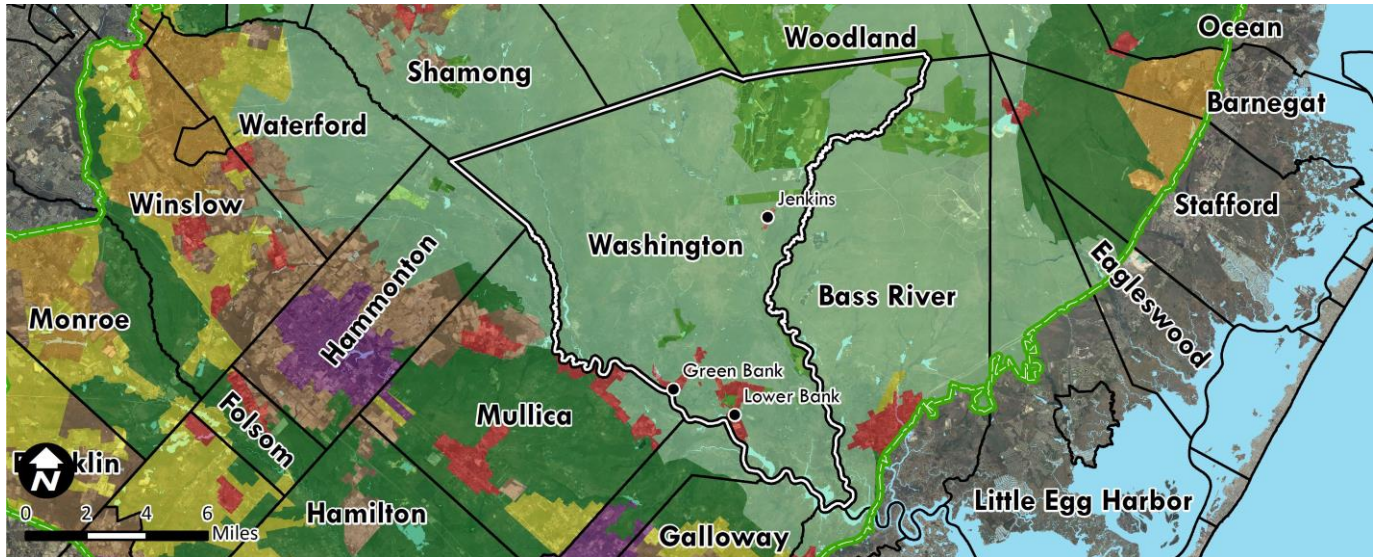
Private Sector Employment 753	Private Sector Establishments 139	Private Sector Avg. Annual Wages \$34,259
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Tabernacle Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Washington Township

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

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



Pinelands Management Areas

Conservation

- 85% Preservation
- Forest
- Agricultural Production
- 13% Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 2% Pinelands Village

Intermediate

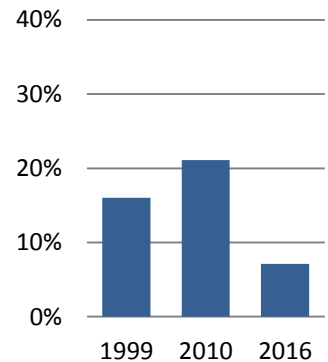
- Rural Development
- Federal**
- Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	695	12,049	192
Population Density (per mile ²)	7	1,763	202
Population Change - 2010 to 2016	1.46%	0.79%	46
% Land Protected in Pinelands Area*	88%	37%	2
Assessed Acres of Farmland	8,058	2,408	20
Building Permits Issued	5	33	111
Housing Transactions	5	116	188
Average Home Sale Price	\$252,380	\$295,642	72
Equalized Property Value (millions)	\$89.3	\$1,499.2	190
Effective Tax Rate	1.87	2.77	165
Average Residential Property Tax Bill	\$4,093	\$6,195	179
Per Capita Income Estimate	\$31,509	\$37,580	111
Unemployment Rate	6.7%	6.1%	59

Estimated Poverty Rate by Year



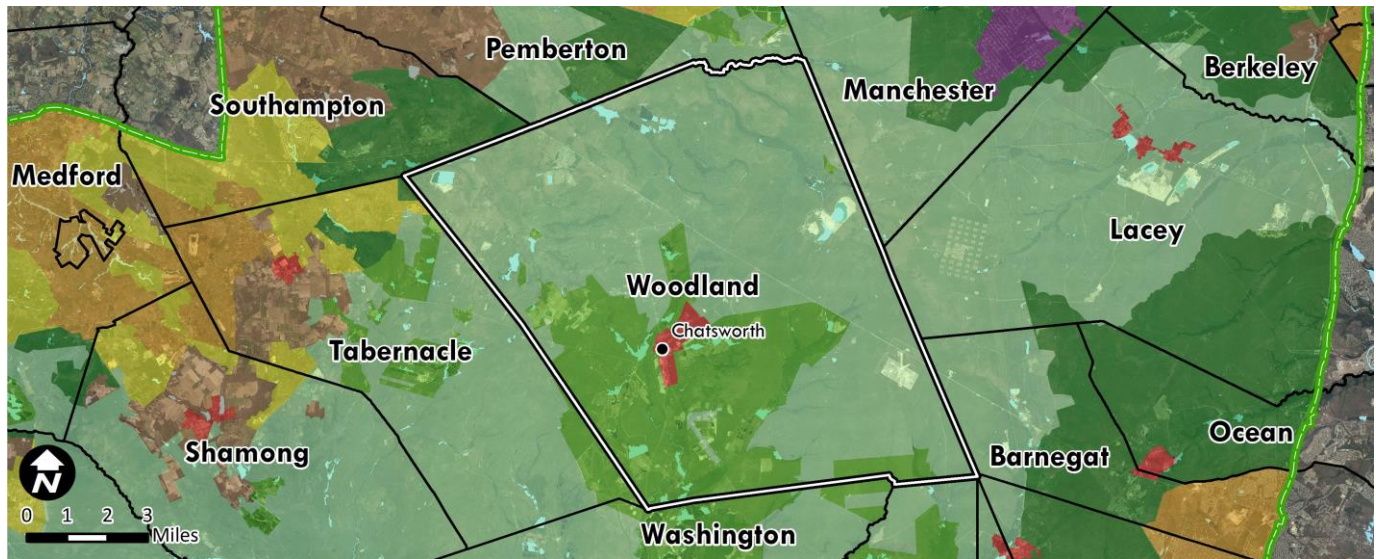
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
158	15	\$42,008

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey. It has not been updated for the 2017 LTEM report due to complications with the data.

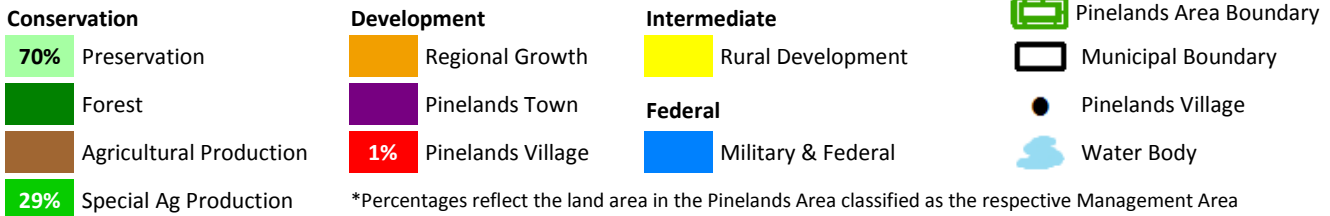
Woodland Township

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

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

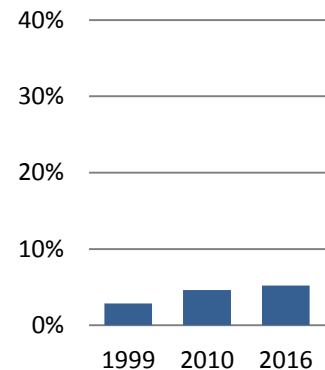


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,778	12,049	165
Population Density (per mile ²)	19	1,763	198
Population Change - 2010 to 2016	-0.34%	0.79%	64
% Land Protected in Pinelands Area*	77%	37%	7%
Assessed Acres of Farmland	11,947	2,408	11
Building Permits Issued	0	33	159
Housing Transactions	9	116	168
Average Home Sale Price	\$285,833	\$295,642	56
Equalized Property Value (millions)	\$151.4	\$1,499.2	177
Effective Tax Rate	2.20	2.77	143
Average Residential Property Tax Bill	\$5,466	\$6,195	115
Per Capita Income Estimate	\$34,505	\$37,580	86
Unemployment Rate	5.2%	6.1%	121

Estimated Poverty Rate by Year



Private Sector Employment

Private Sector Establishments

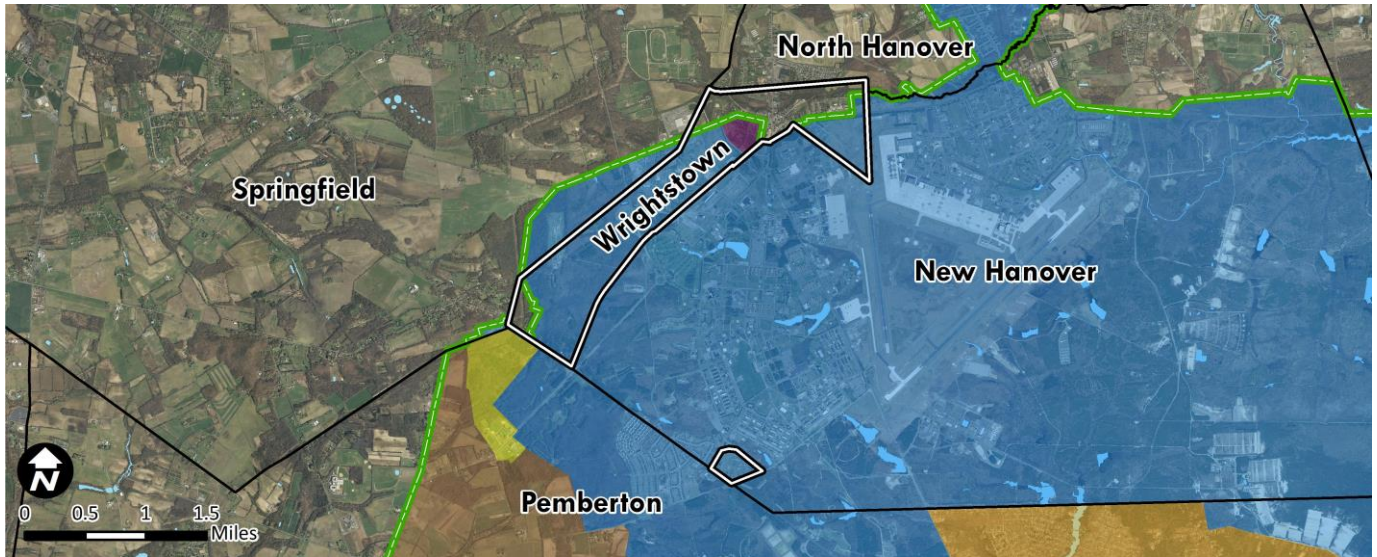
Private Sector Avg. Annual Wages
\$-

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Woodland Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Wrightstown Borough

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

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



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- 6% Pinelands Town
- Pinelands Village

Intermediate

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

Pinelands Area Boundary

Municipal Boundary

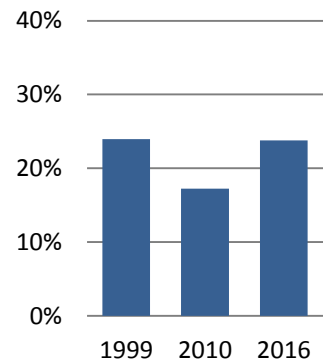
Pinelands Village

Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	787	12,049	190
Population Density (per mile ²)	442	1,763	136
Population Change - 2010 to 2016	-2.24%	0.79%	73
% Land Protected in Pinelands Area*	0%	37%	46
Assessed Acres of Farmland	23	2,408	117
Building Permits Issued	0	33	159
Housing Transactions	2	116	195
Average Home Sale Price	\$232,500	\$295,642	90
Equalized Property Value (millions)	\$37.5	\$1,499.2	198
Effective Tax Rate	2.59	2.77	119
Average Residential Property Tax Bill	\$3,934	\$6,195	185
Per Capita Income Estimate	\$22,817	\$37,580	184
Unemployment Rate	5.6%	6.1%	102

Estimated Poverty Rate by Year



Private Sector Employment
607

Private Sector Establishments
68

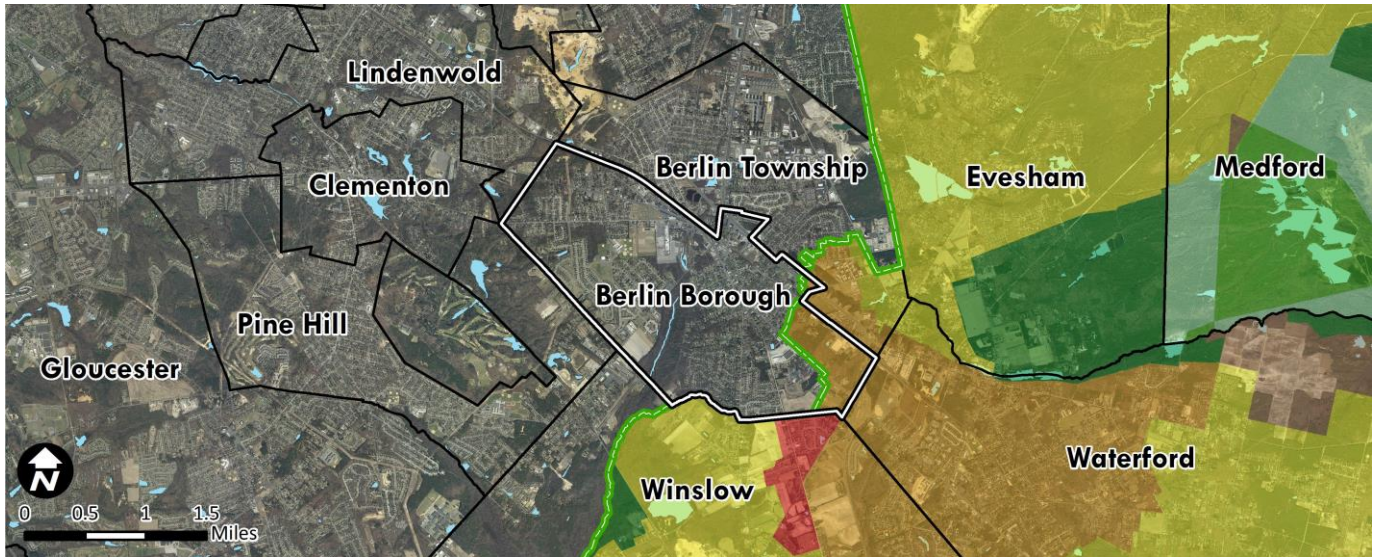
Private Sector Avg. Annual Wages
\$40,160

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Wrightstown Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

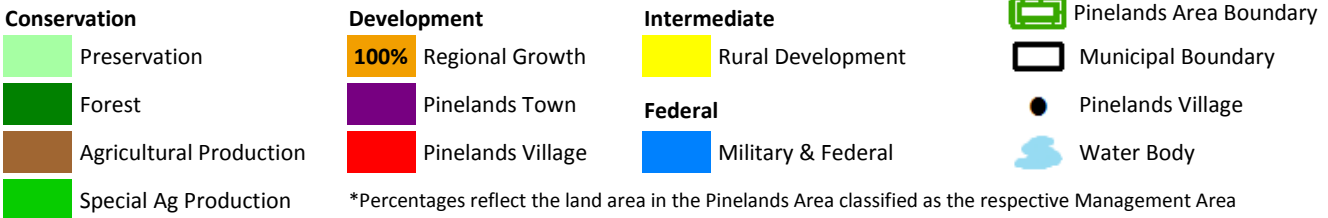
Berlin Borough

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

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

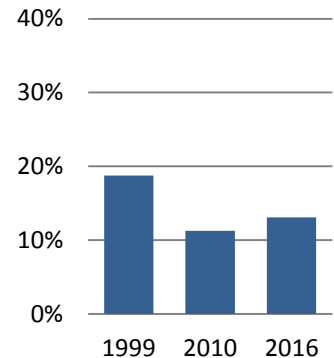


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	7,594	12,049	86
Population Density (per mile ²)	2,104	1,763	72
Population Change - 2010 to 2016	-0.51%	0.79%	96
% Land Protected in Pinelands Area*	0%	37%	46
Assessed Acres of Farmland	87	2,408	104
Building Permits Issued	2	33	136
Housing Transactions	82	116	77
Average Home Sale Price	\$226,928	\$295,642	98
Equalized Property Value (millions)	\$735.9	\$1,499.2	97
Effective Tax Rate	3.08	2.77	71
Average Residential Property Tax Bill	\$7,152	\$6,195	47
Per Capita Income Estimate	\$38,442	\$37,580	55
Unemployment Rate	5.0%	6.1%	131

Estimated Poverty Rate by Year



Private Sector Employment 4,173	Private Sector Establishments 358	Private Sector Avg. Annual Wages \$43,504
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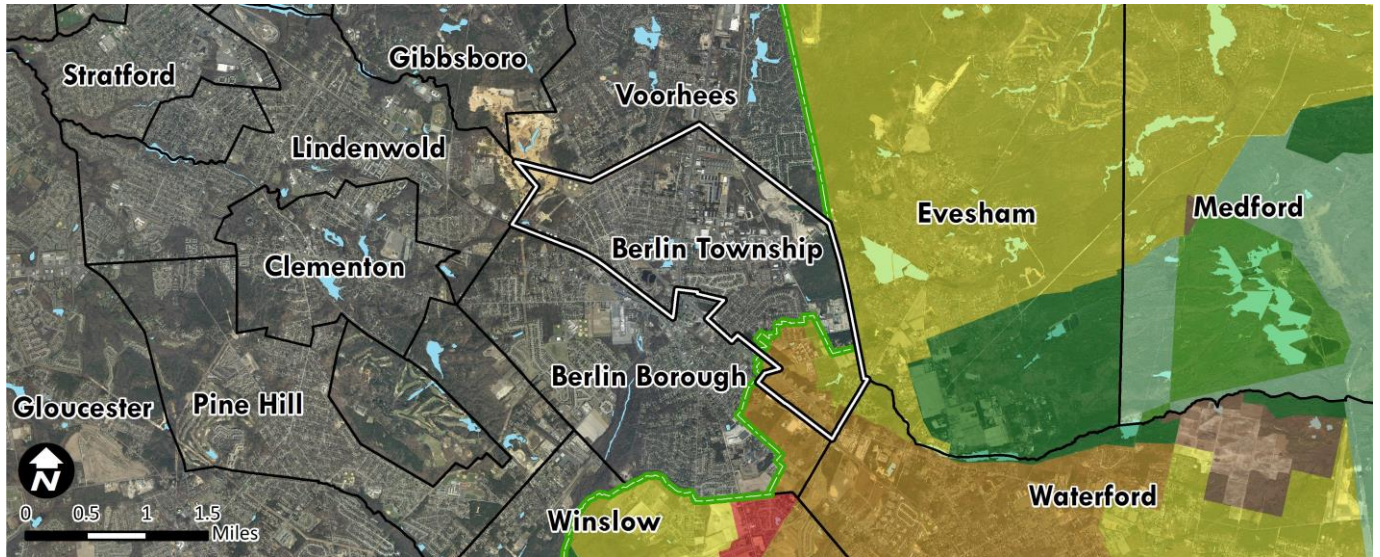
* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Berlin Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Berlin Township



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

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



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 64%** Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- 36%** Rural Development

Federal

- Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

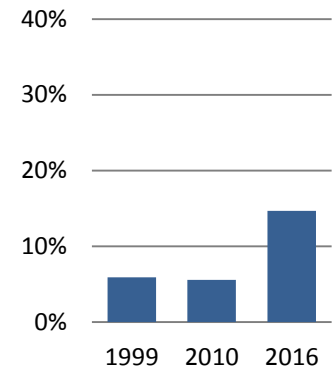


Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	5,513	12,049	107
Population Density (per mile ²)	1,656	1,763	82
Population Change - 2010 to 2016	2.66%	0.79%	29
% Land Protected in Pinelands Area*	0	37%	46
Assessed Acres of Farmland	157	2,408	100
Building Permits Issued	34	33	47
Housing Transactions	9	116	168
Average Home Sale Price	\$197,256	\$295,642	124
Equalized Property Value (millions)	\$570.5	\$1,499.2	110
Effective Tax Rate	3.54	2.77	42
Average Residential Property Tax Bill	\$6,123	\$6,195	86
Per Capita Income Estimate	\$26,293	\$37,580	167
Unemployment Rate	6.5%	6.1%	70

Estimated Poverty Rate by Year



Private Sector Employment
5,148

Private Sector Establishments
379

Private Sector Avg. Annual Wages
\$39,559

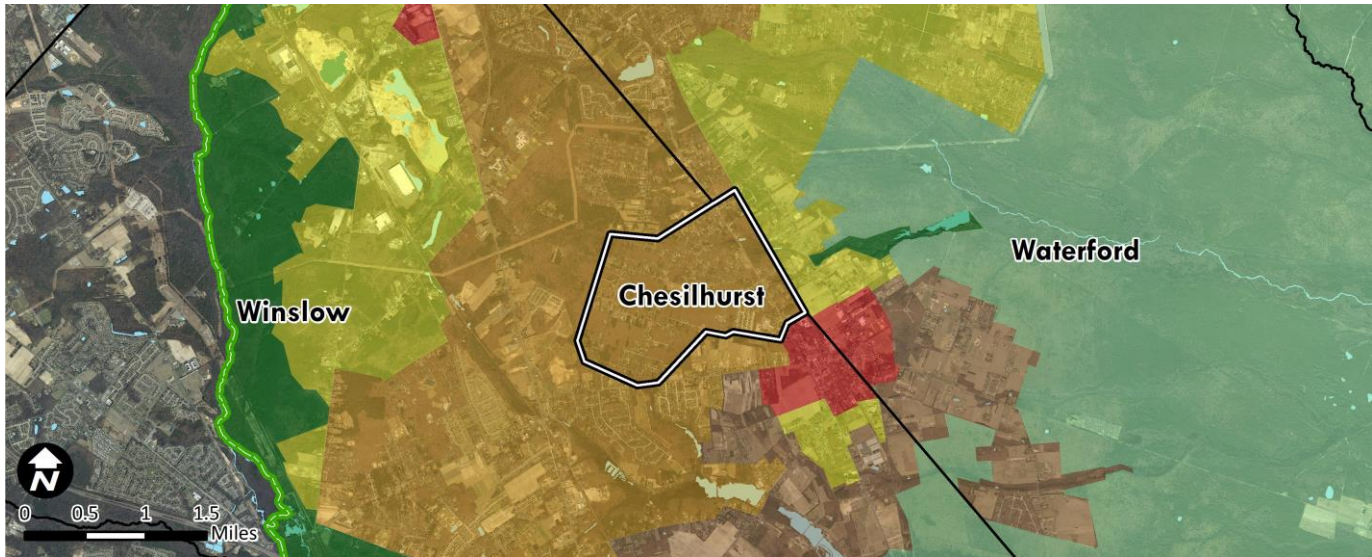
* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Berlin Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Chesilhurst Borough

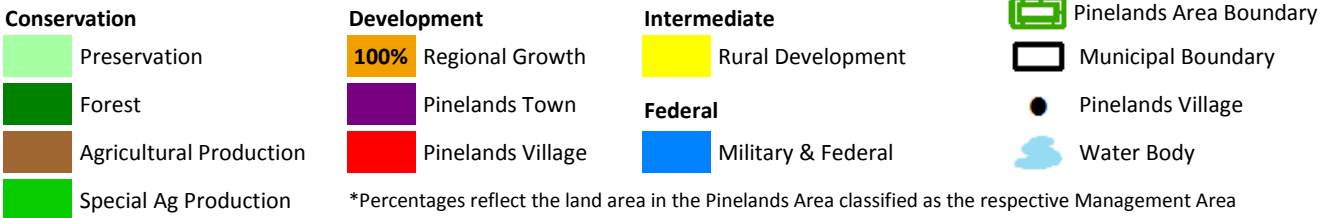


Pinelands Area 2010 population: 1,634 (100% of total population)

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

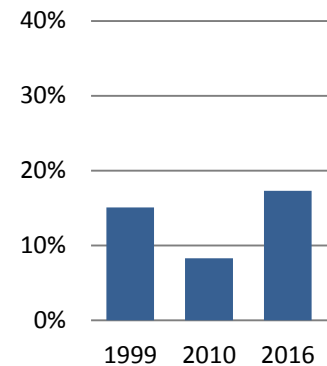


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,636	12,049	169
Population Density (per mile ²)	951	1,763	105
Population Change - 2010 to 2016	0.18%	0.79%	53
% Land Protected in Pinelands Area*	<1%	37%	45
Assessed Acres of Farmland	0	2,408	124
Building Permits Issued	0	33	159
Housing Transactions	3	116	192
Average Home Sale Price	\$129,184	\$295,642	185
Equalized Property Value (millions)	\$85.1	\$1,499.2	192
Effective Tax Rate	3.37	2.77	53
Average Residential Property Tax Bill	\$5,279	\$6,195	125
Per Capita Income Estimate	\$22,783	\$37,580	185
Unemployment Rate	7.4%	6.1%	38

Estimated Poverty Rate by Year



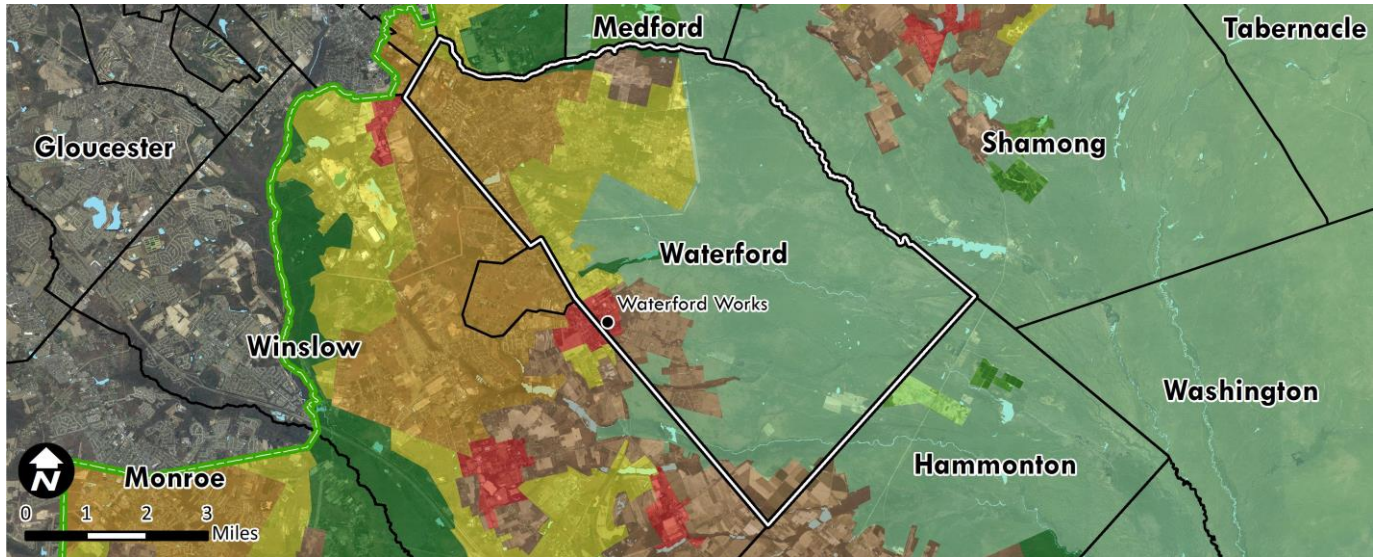
Private Sector Employment 130	Private Sector Establishments 20	Private Sector Avg. Annual Wages \$31,201
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Chesilhurst Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Waterford Township

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

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



Pinelands Management Areas

Conservation

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

Development

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

Intermediate

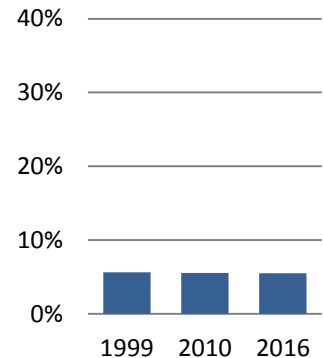
- 15%** Rural Development
- Federal** Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	10,754	12,049	61
Population Density (per mile ²)	297	1,763	151
Population Change - 2010 to 2016	1.04%	0.79%	31
% Land Protected in Pinelands Area*	65%	37%	13
Assessed Acres of Farmland	2,089	2,408	62
Building Permits Issued	24	33	58
Housing Transactions	75	116	80
Average Home Sale Price	\$192,729	\$295,642	127
Equalized Property Value (millions)	\$747.9	\$1,499.2	95
Effective Tax Rate	3.66	2.77	39
Average Residential Property Tax Bill	\$6,707	\$6,195	64
Per Capita Income Estimate	\$31,399	\$37,580	114
Unemployment Rate	5.8%	6.1%	93

Estimated Poverty Rate by Year



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
2,080	228	\$31,964

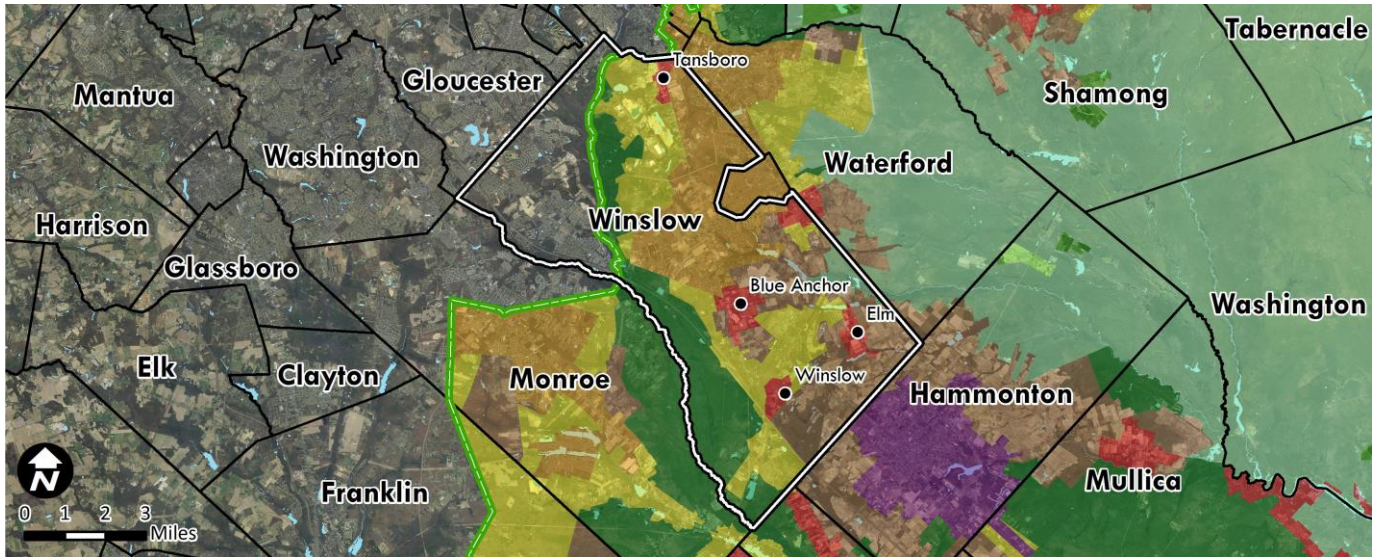
* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Waterford Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Winslow Township

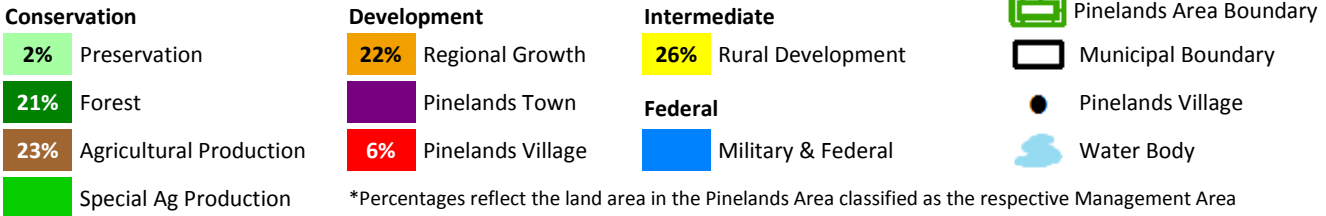


Pinelands Area 2010 population: 17,813 (45% of total population)

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

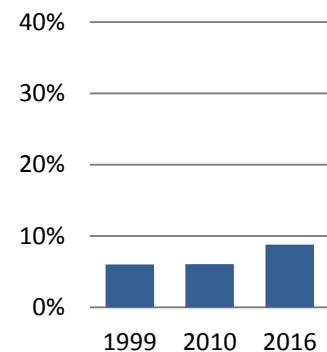


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	39,328	12,049	15
Population Density (per mile ²)	675	1,763	123
Population Change - 2010 to 2016	-1.26%	0.79%	195
% Land Protected in Pinelands Area*	30%	0.37	31
Assessed Acres of Farmland	6,444	2,408	32
Building Permits Issued	44	33	39
Housing Transactions	252	116	23
Average Home Sale Price	\$192,461	\$295,642	128
Equalized Property Value (millions)	\$2,617.9	\$1,499.2	33
Effective Tax Rate	3.33	2.77	58
Average Residential Property Tax Bill	\$5,764	\$6,195	103
Per Capita Income Estimate	\$32,684	\$37,580	97
Unemployment Rate	6.1%	6.1%	82

Estimated Poverty Rate by Year



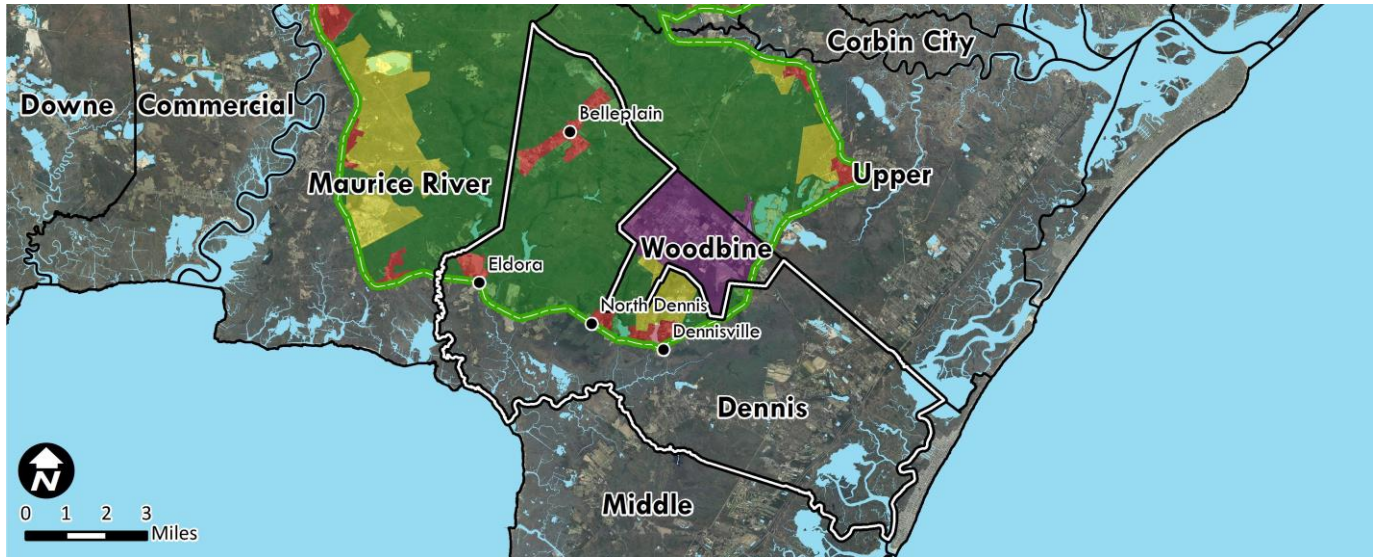
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
5,994	622	\$33,518

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Winslow Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Dennis Township

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

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



Pinelands Management Areas

Conservation

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

Development

- Regional Growth
- Pinelands Town
- 10% Pinelands Village

Intermediate

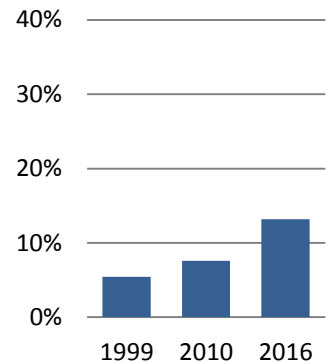
- 6% Rural Development
- Federal Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,285	12,049	99
Population Density (per mile ²)	99	1,763	183
Population Change - 2010 to 2016	-2.86%	0.79%	162
% Land Protected in Pinelands Area*	69%	37%	11
Assessed Acres of Farmland	4,033	2,408	51
Building Permits Issued	13	33	75
Housing Transactions	49	116	103
Average Home Sale Price	\$244,980	\$295,642	80
Equalized Property Value (millions)	\$887.3	\$1,499.2	86
Effective Tax Rate	1.52	2.77	178
Average Residential Property Tax Bill	\$2,833	\$6,195	197
Per Capita Income Estimate	\$28,201	\$37,580	152
Unemployment Rate	7.0%	6.1%	47

Estimated Poverty Rate by Year



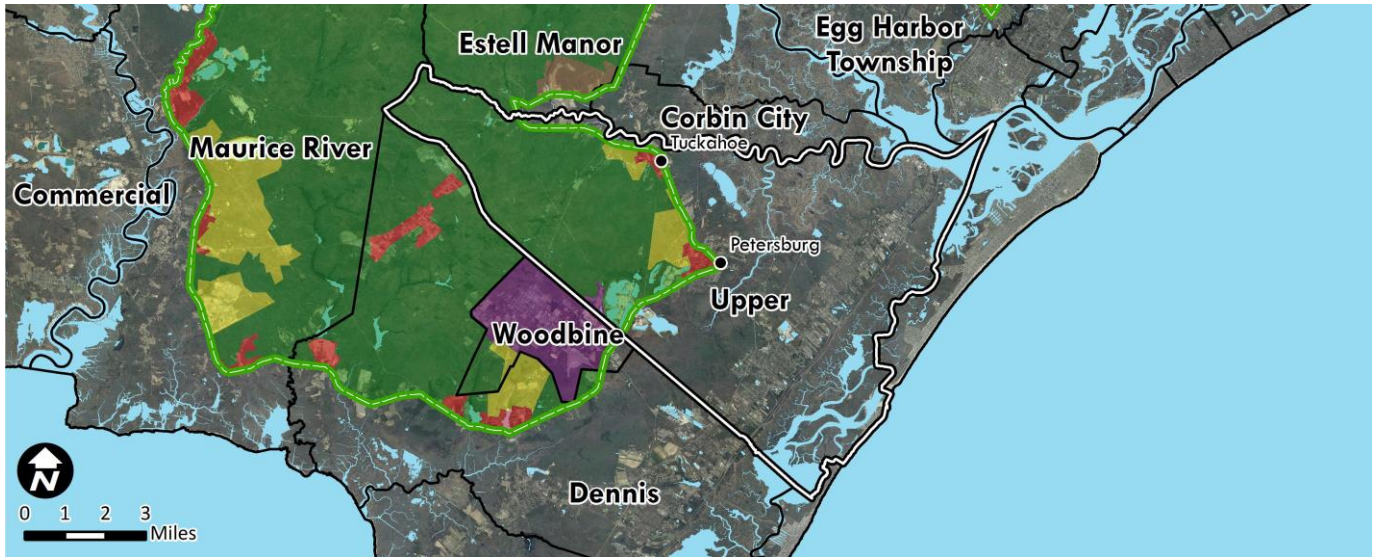
Private Sector Employment 1,413	Private Sector Establishments 188	Private Sector Avg. Annual Wages \$39,239
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Dennis Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

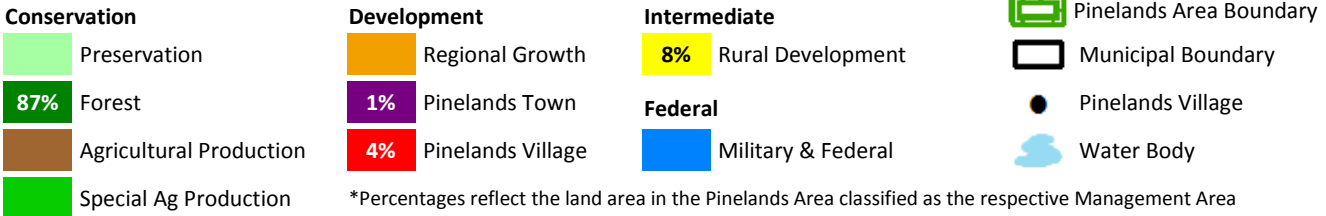
Upper Township

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

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

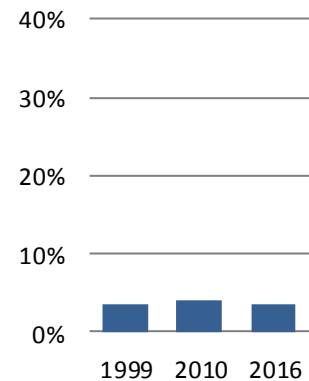


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	11,976	12,049	55
Population Density (per mile ²)	175	1,763	171
Population Change - 2010 to 2016	-3.14%	0.79%	190
% Land Protected in Pinelands Area*	52%	37%	18
Assessed Acres of Farmland	3,033	2,408	56
Building Permits Issued	12	33	78
Housing Transactions	120	116	56
Average Home Sale Price	\$367,041	\$295,642	27
Equalized Property Value (millions)	\$1,902.7	\$1,499.2	48
Effective Tax Rate	1.67	2.77	175
Average Residential Property Tax Bill	\$4,713	\$6,195	155
Per Capita Income Estimate	\$37,057	\$37,580	61
Unemployment Rate	6.6%	6.1%	66

Estimated Poverty Rate by Year



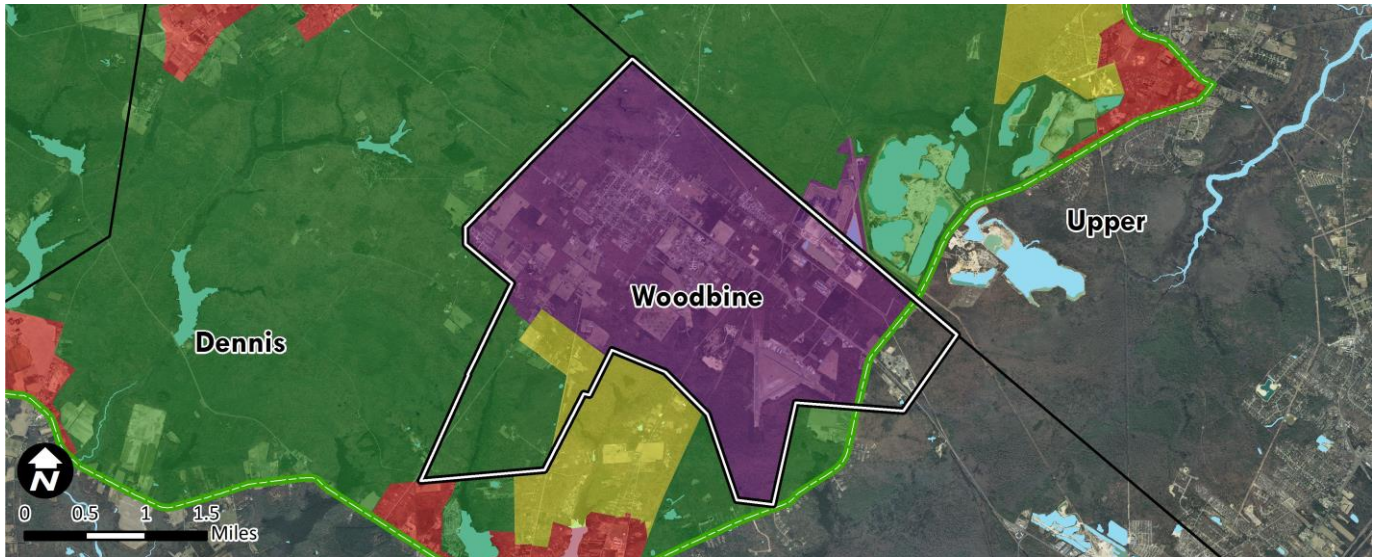
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
2,880	276	\$38,987

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Upper Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Woodbine Borough

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

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



Pinelands Management Areas

Conservation

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

Development

- Regional Growth
- 83%** Pinelands Town
- Pinelands Village

Intermediate

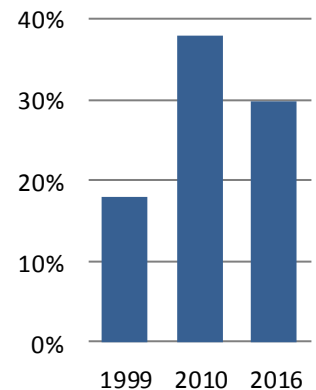
- 4%** Rural Development
- Federal**
- Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,494	12,049	152
Population Density (per mile ²)	311	1,763	150
Population Change - 2010 to 2016	1.18%	0.79%	42
% Land Protected in Pinelands Area*	7%	37%	41
Assessed Acres of Farmland	374	2,408	86
Building Permits Issued	3	33	132
Housing Transactions	2	116	195
Average Home Sale Price	\$247,500	\$295,642	77
Equalized Property Value (millions)	\$158.5	\$1,499.2	175
Effective Tax Rate	1.62	2.77	176
Average Residential Property Tax Bill	\$1,783	\$6,195	201
Per Capita Income Estimate	\$17,907	\$37,580	194
Unemployment Rate	8.6%	6.1%	23

Estimated Poverty Rate by Year



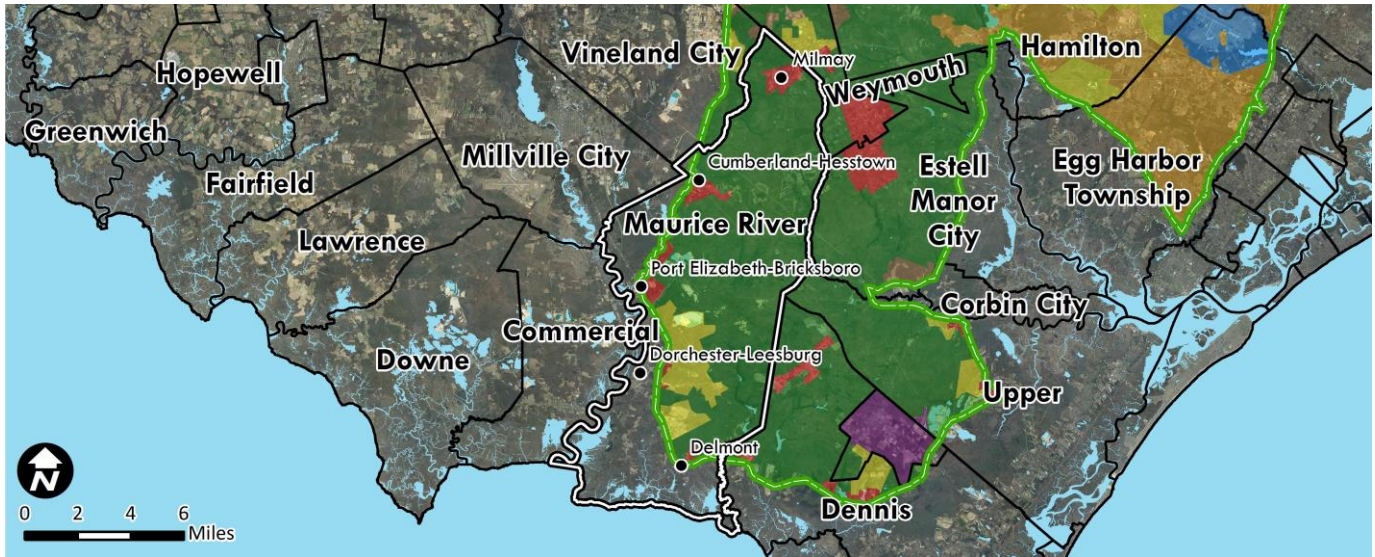
Private Sector Employment	628	Private Sector Establishments	69	Private Sector Avg. Annual Wages	\$42,103
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Woodbine Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

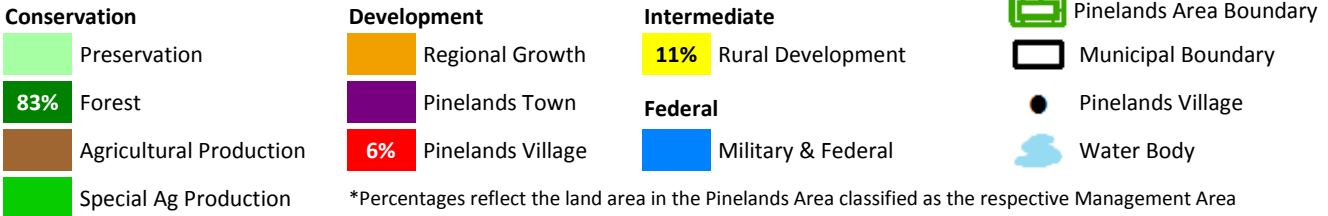
Maurice River Township

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

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

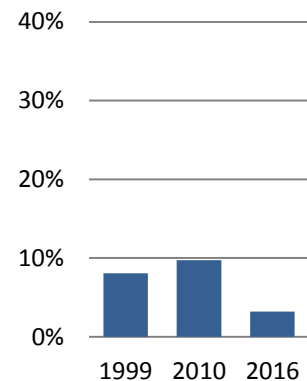


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	6,562	12,049	97
Population Density (per mile ²)	69	1,763	191
Population Change - 2010 to 2016	-11.84%	0.79%	201
% Land Protected in Pinelands Area*	51%	37%	20
Assessed Acres of Farmland	10,739	2,408	13
Building Permits Issued	9	33	85
Housing Transactions	11	116	164
Average Home Sale Price	\$168,091	\$295,642	149
Equalized Property Value (millions)	\$294.8	\$1,499.2	140
Effective Tax Rate	2.54	2.77	126
Average Residential Property Tax Bill	\$4,405	\$6,195	169
Per Capita Income Estimate	\$15,669	\$37,580	199
Unemployment Rate	8.9%	6.1%	21

Estimated Poverty Rate by Year



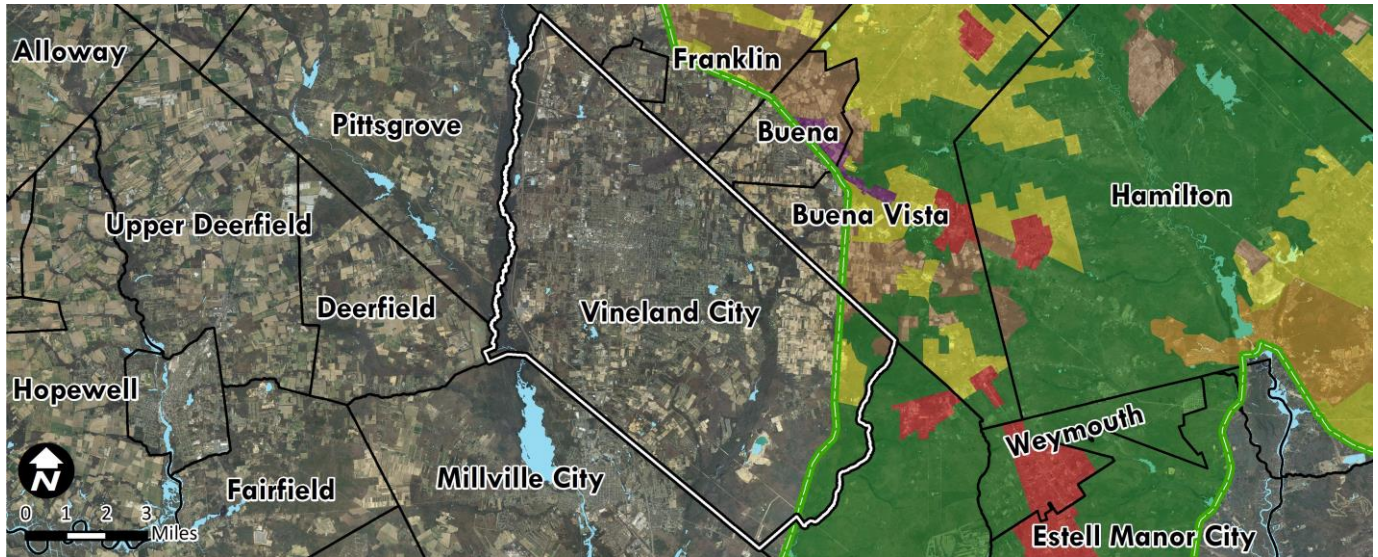
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
236	28	\$30,447

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Maurice River Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

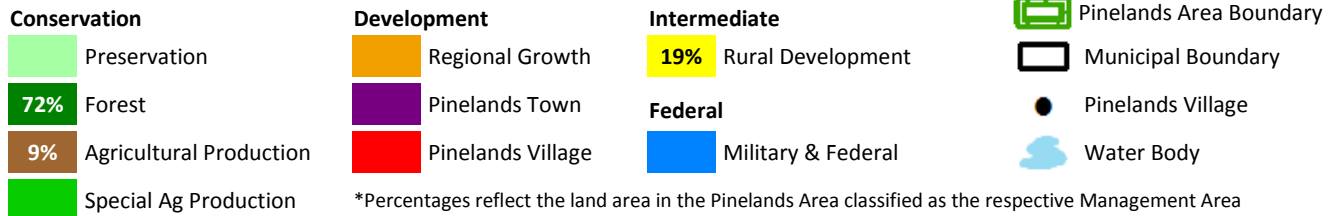
Vineland City

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

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

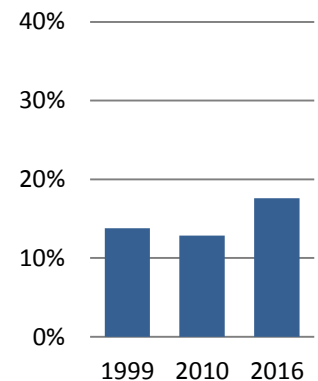


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	60,525	12,049	7
Population Density (per mile ²)	877	1,763	113
Population Change - 2010 to 2016	-0.48%	0.79%	180
% Land Protected in Pinelands Area*	80%	37%	4
Assessed Acres of Farmland	10,454	2,408	15
Building Permits Issued	51	33	36
Housing Transactions	336	116	15
Average Home Sale Price	\$174,388	\$295,642	143
Equalized Property Value (millions)	\$4,095.4	\$1,499.2	20
Effective Tax Rate	2.45	2.77	130
Average Residential Property Tax Bill	\$4,102	\$6,195	178
Per Capita Income Estimate	\$23,886	\$37,580	179
Unemployment Rate	7.2%	6.1%	44

Estimated Poverty Rate by Year



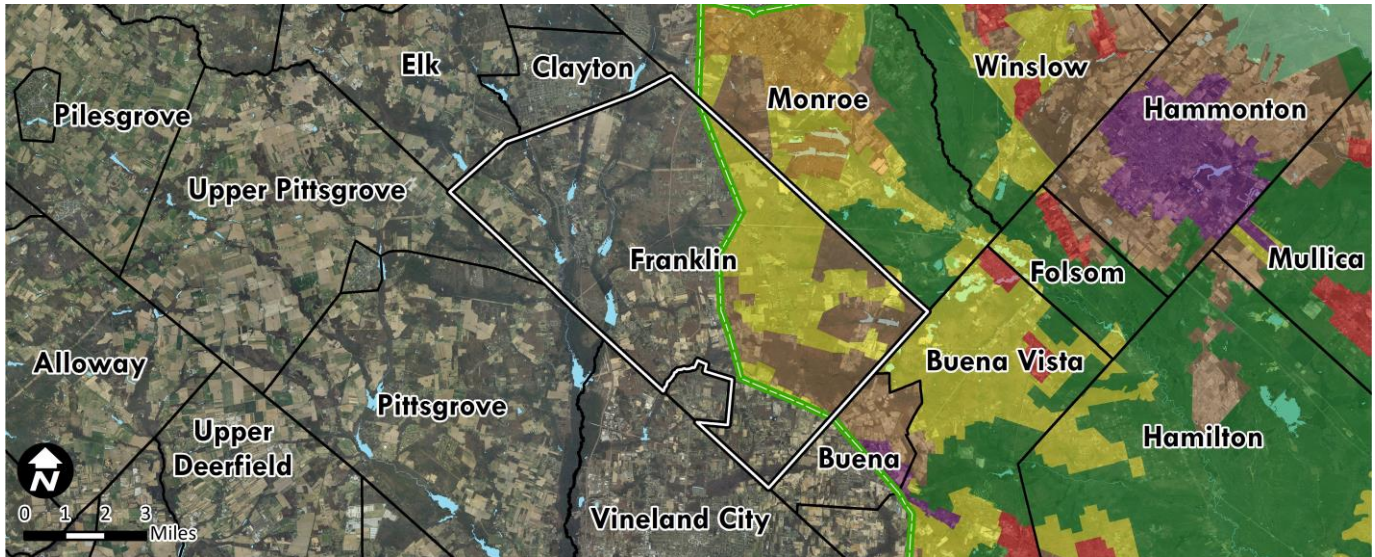
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
25,434	1,538	\$41,692

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For the City of Vineland it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

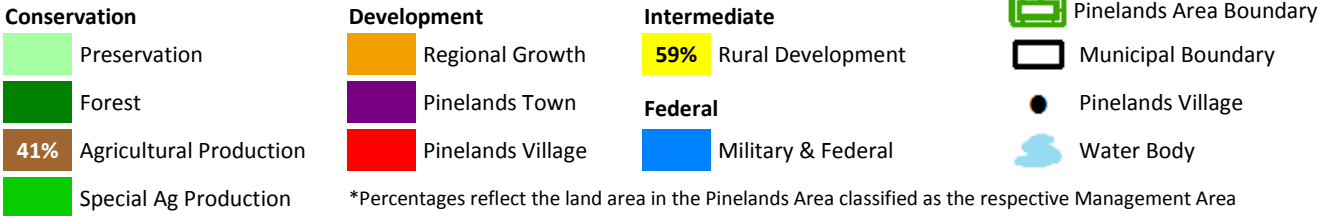
Franklin Township

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

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

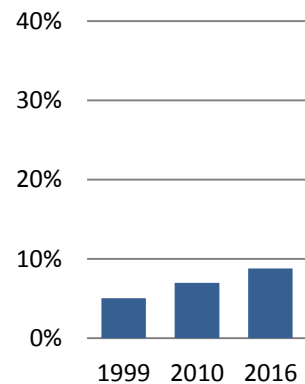


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	16,568	12,049	43
Population Density (per mile ²)	294	1,763	152
Population Change - 2010 to 2016	-1.23%	0.79%	167
% Land Protected in Pinelands Area*	33%	37%	27
Assessed Acres of Farmland	14,215	2,408	5
Building Permits Issued	17	33	67
Housing Transactions	90	116	71
Average Home Sale Price	\$212,717	\$295,642	107
Equalized Property Value (millions)	\$1,299.1	\$1,499.2	68
Effective Tax Rate	3.05	2.77	74
Average Residential Property Tax Bill	\$5,952	\$6,195	95
Per Capita Income Estimate	\$31,175	\$37,580	118
Unemployment Rate	6.7%	6.1%	59

Estimated Poverty Rate by Year



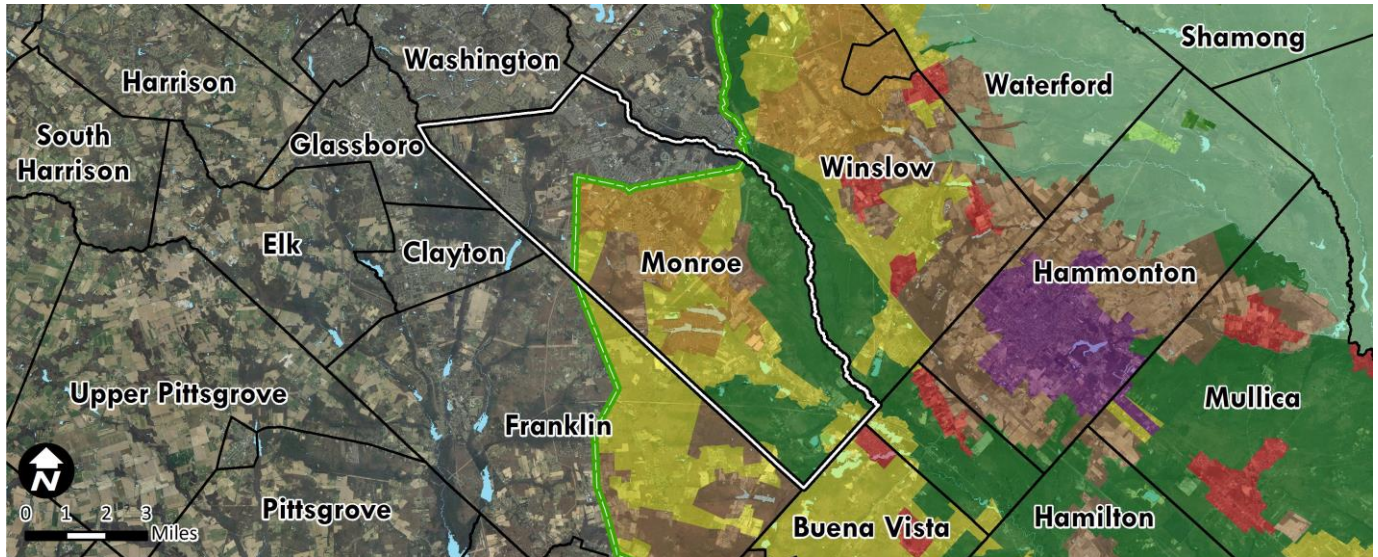
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
1,578	220	\$36,902

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Franklin Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

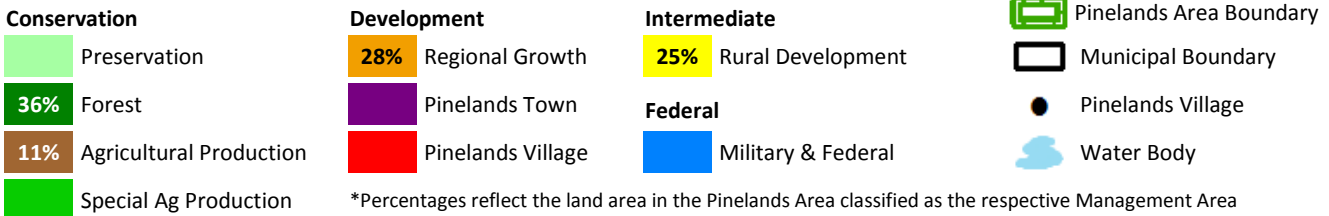
Monroe Township

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

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

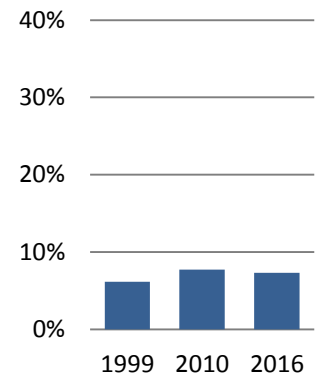


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	36,908	12,049	17
Population Density (per mile ²)	787	1,763	117
Population Change - 2010 to 2016	1.98%	0.79%	9
% Land Protected in Pinelands Area*	25%	37%	33
Assessed Acres of Farmland	6,061	2,408	34
Building Permits Issued	120	33	12
Housing Transactions	261	116	20
Average Home Sale Price	\$208,897	\$295,642	111
Equalized Property Value (millions)	\$2,630.7	\$1,499.2	32
Effective Tax Rate	3.54	2.77	43
Average Residential Property Tax Bill	\$7,011	\$6,195	53
Per Capita Income Estimate	\$32,326	\$37,580	105
Unemployment Rate	5.7%	6.1%	98

Estimated Poverty Rate by Year



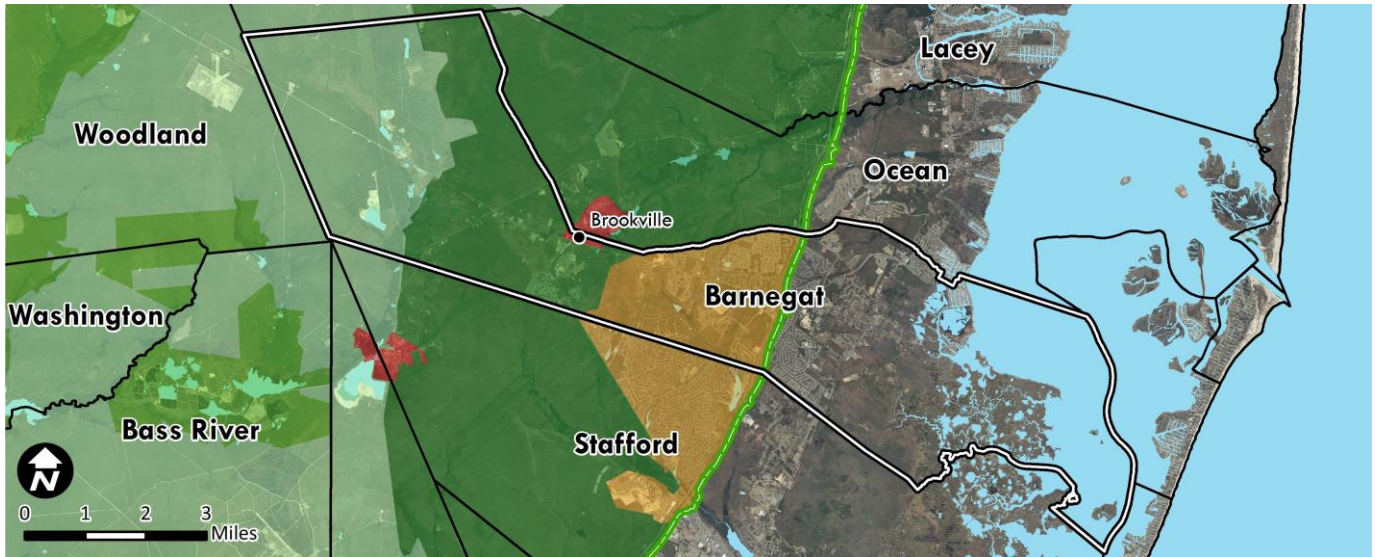
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
6,306	626	\$35,545

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Monroe Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

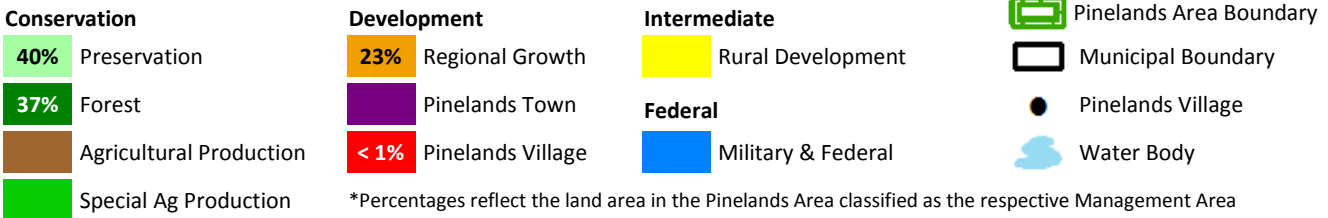
Barnegat Township

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

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

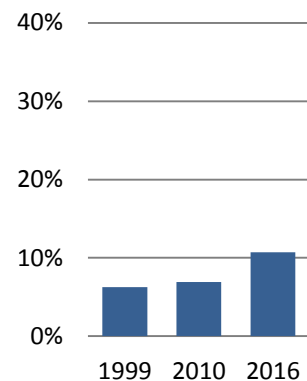


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	22,288	12,049	31
Population Density (per mile ²)	553	1,763	130
Population Change - 2010 to 2016	5.85%	0.79%	5
% Land Protected in Pinelands Area*	62%	37%	14
Assessed Acres of Farmland	633	2,408	80
Building Permits Issued	204	33	7
Housing Transactions	252	116	23
Average Home Sale Price	\$233,411	\$295,642	88
Equalized Property Value (millions)	\$2,253.2	\$1,499.2	41
Effective Tax Rate	2.66	2.77	113
Average Residential Property Tax Bill	\$6,248	\$6,195	82
Per Capita Income Estimate	\$30,163	\$37,580	133
Unemployment Rate	5.5%	6.1%	105

Estimated Poverty Rate by Year



Private Sector Employment 2,179	Private Sector Establishments 309	Private Sector Avg. Annual Wages \$36,651
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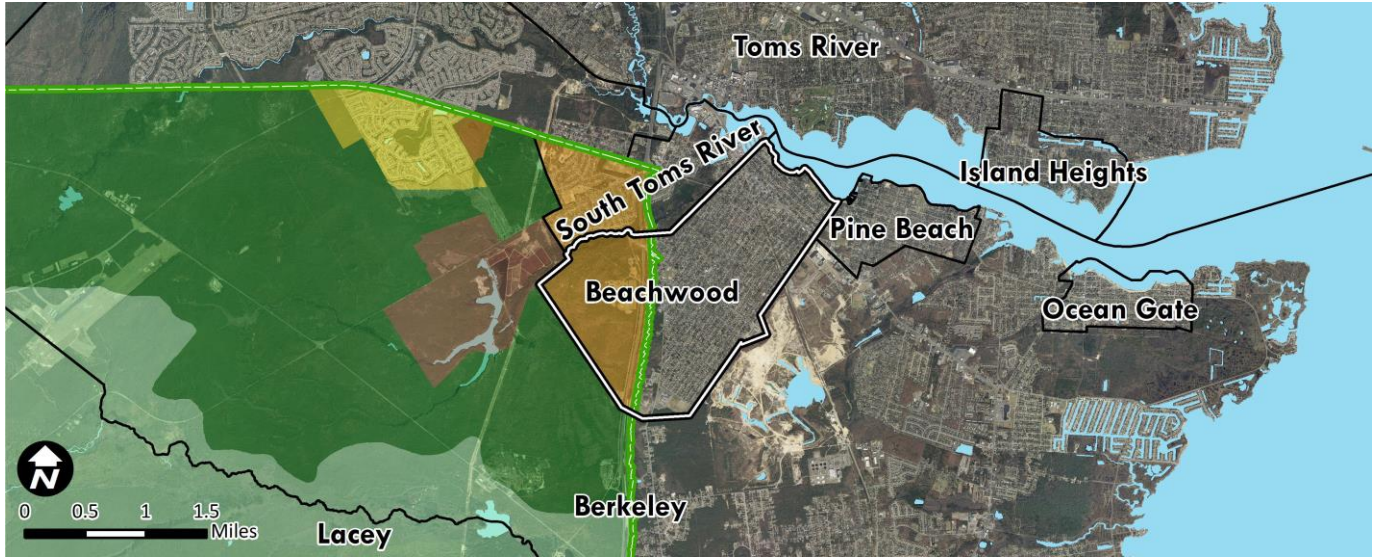
* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Barnegat Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Beachwood Borough



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

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



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 100% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- Rural Development
- Federal**
- Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

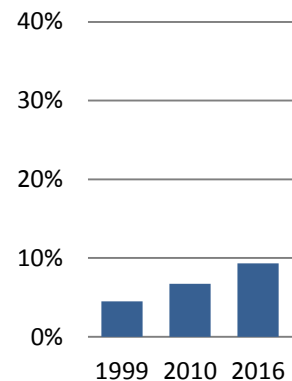


Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	11,196	12,049	60
Population Density (per mile ²)	4,042	1,763	23
Population Change - 2010 to 2016	1.28%	0.79%	30
% Land Protected in Pinelands Area*	69%	37%	10
Assessed Acres of Farmland	0	2,408	124
Building Permits Issued	5	33	111
Housing Transactions	37	116	120
Average Home Sale Price	\$230,231	\$295,642	94
Equalized Property Value (millions)	\$869.6	\$1,499.2	87
Effective Tax Rate	2.16	2.77	150
Average Residential Property Tax Bill	\$4,736	\$6,195	154
Per Capita Income Estimate	\$28,774	\$37,580	145
Unemployment Rate	4.9%	6.1%	138

Estimated Poverty Rate by Year



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
622	107	\$27,967

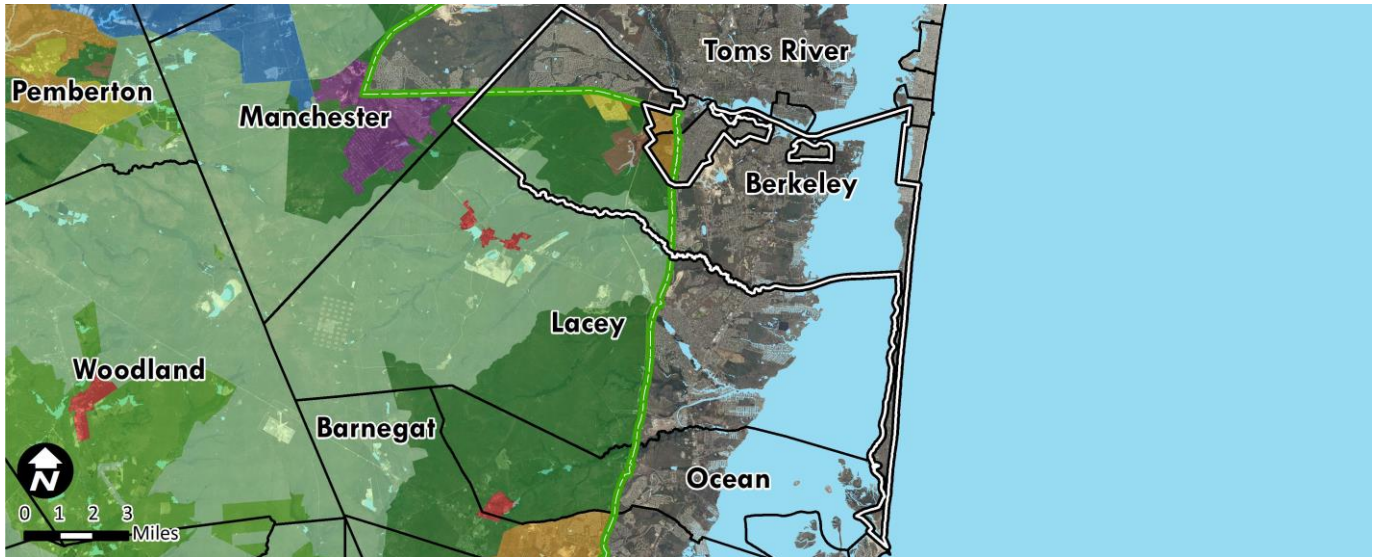
* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Beachwood Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Berkeley Township

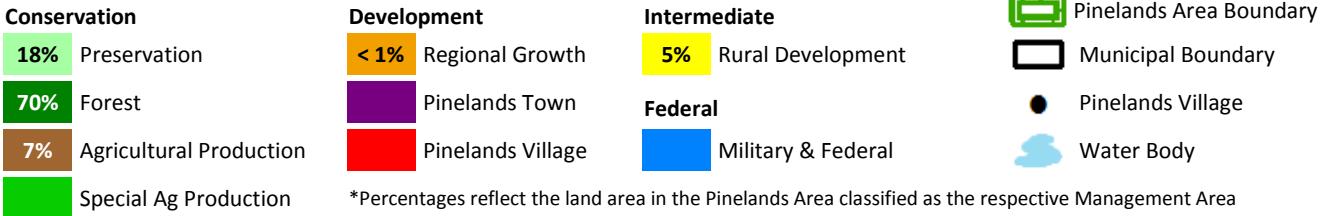


Pinelands Area 2010 population: 2,112 (5% of total population)

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

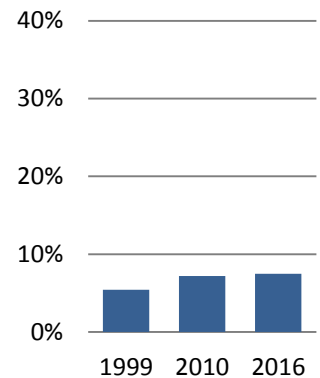


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	41,689	12,049	14
Population Density (per mile ²)	770	1,763	118
Population Change - 2010 to 2016	0.94%	0.79%	21
% Land Protected in Pinelands Area*	75%	37%	8*
Assessed Acres of Farmland	87	2,408	104
Building Permits Issued	72	33	28
Housing Transactions	908	116	3
Average Home Sale Price	\$187,583	\$295,642	130
Equalized Property Value (millions)	\$5,286.4	\$1,499.2	11
Effective Tax Rate	2.00	2.77	161
Average Residential Property Tax Bill	\$4,120	\$6,195	177
Per Capita Income Estimate	\$31,025	\$37,580	120
Unemployment Rate	6.7%	6.1%	59

Estimated Poverty Rate by Year



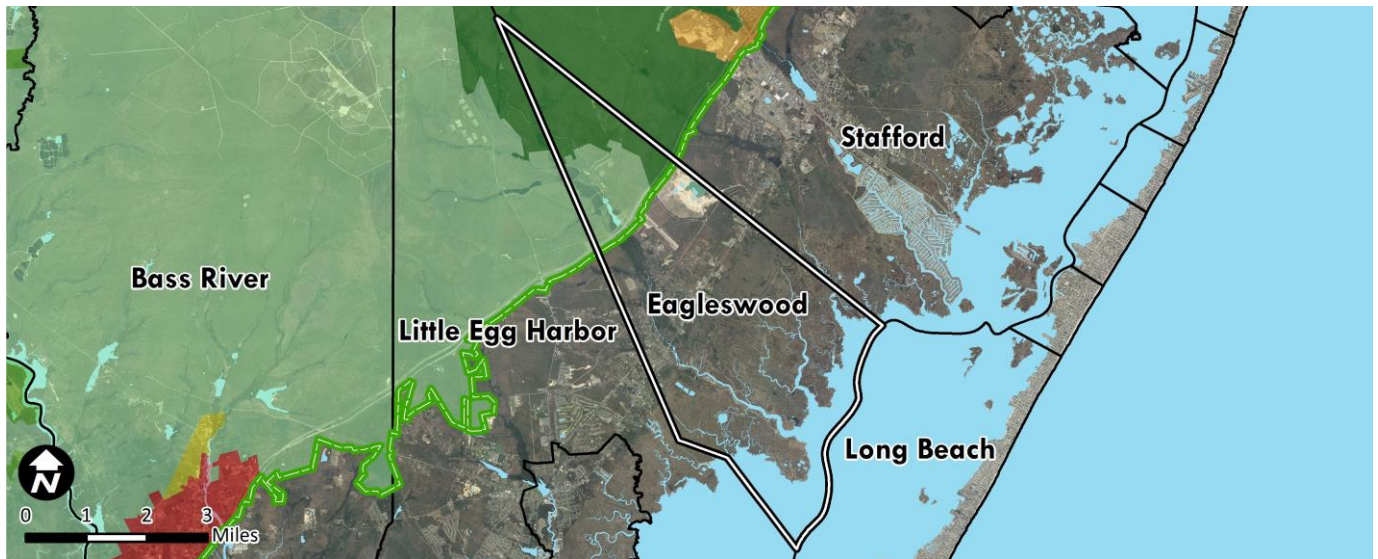
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
3,311	385	\$36,768

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Berkeley Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Eagleswood Township

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

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



Pinelands Management Areas

Conservation

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

Development

- Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

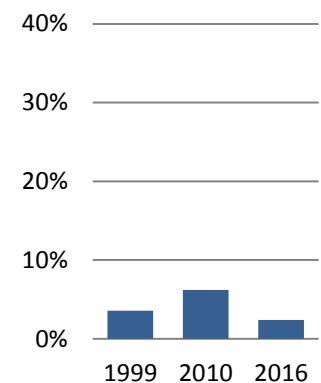
- Rural Development
- Federal**
- Military & Federal

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

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	1,604	12,049	170
Population Density (per mile ²)	85	1,763	186
Population Change - 2010 to 2016	0.12%	0.79%	54
% Land Protected in Pinelands Area*	78%	37%	6
Assessed Acres of Farmland	264	2,408	90
Building Permits Issued	10	33	80
Housing Transactions	9	116	168
Average Home Sale Price	\$298,508	\$295,642	48
Equalized Property Value (millions)	\$231.8	\$1,499.2	158
Effective Tax Rate	2.43	2.77	131
Average Residential Property Tax Bill	\$5,968	\$6,195	93
Per Capita Income Estimate	\$33,218	\$37,580	94
Unemployment Rate	6.5%	6.1%	70

Estimated Poverty Rate by Year



Private Sector Employment
864

Private Sector Establishments
90

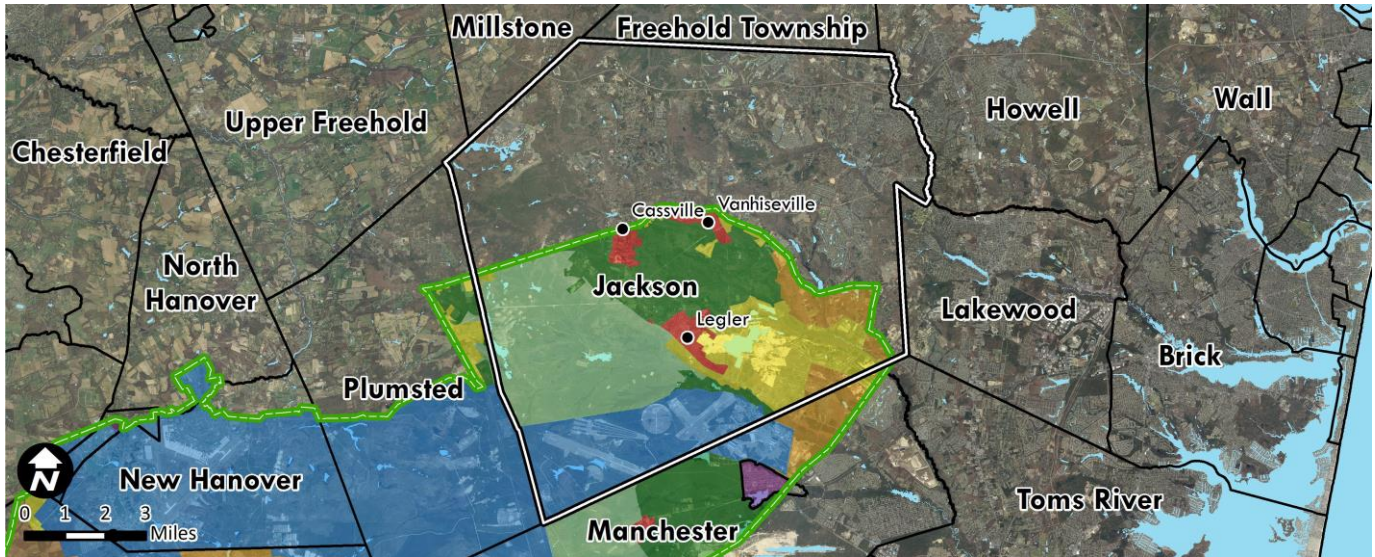
Private Sector Avg. Annual Wages
\$52,195

*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey. It has not been updated for the 2017 LTEM report due to complications with the data.

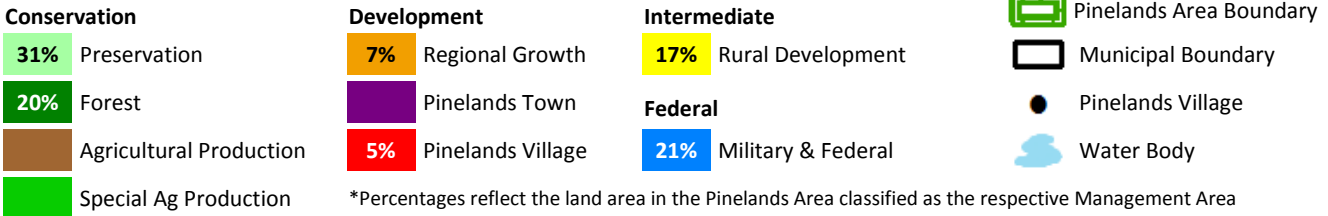
Jackson Township

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

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

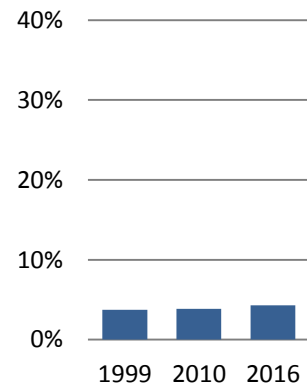


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	56,733	12,049	8
Population Density (per mile ²)	564	1,763	129
Population Change - 2010 to 2016	3.02%	0.79%	3
% Land Protected in Pinelands Area*	49%	37%	22
Assessed Acres of Farmland	4,952	2,408	41
Building Permits Issued	304	33	4
Housing Transactions	745	116	6
Average Home Sale Price	\$349,295	\$295,642	32
Equalized Property Value (millions)	\$6,948.8	\$1,499.2	8
Effective Tax Rate	2.11	2.77	154
Average Residential Property Tax Bill	\$7,139	\$6,195	50
Per Capita Income Estimate	\$36,936	\$37,580	62
Unemployment Rate	4.8%	6.1%	144

Estimated Poverty Rate by Year



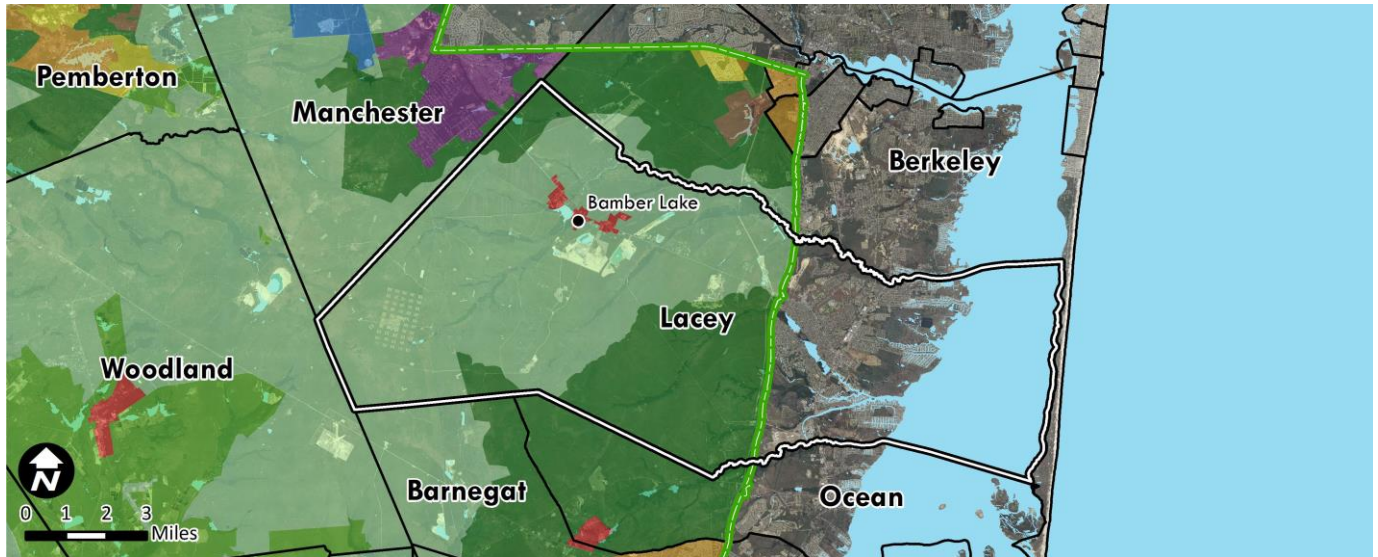
Private Sector Employment 9,767	Private Sector Establishments 926	Private Sector Avg. Annual Wages \$32,721
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Jackson Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

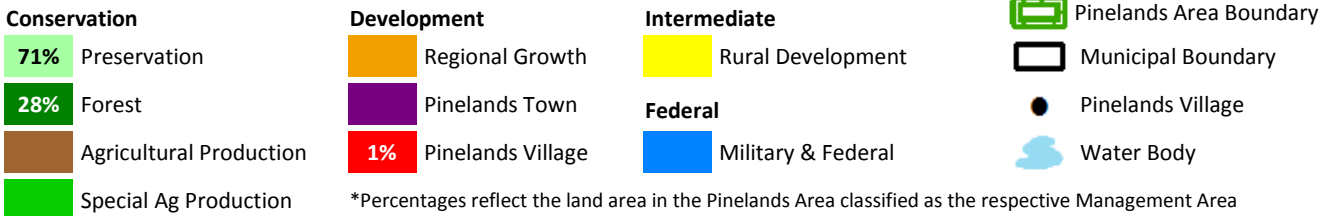
Lacey Township

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

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

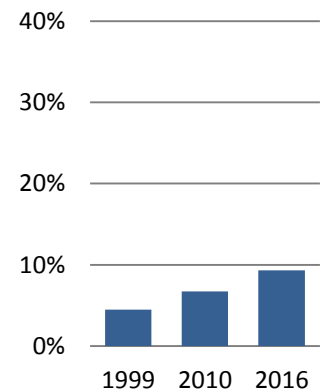


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	28,569	12,049	23
Population Density (per mile ²)	287	1,763	153
Population Change - 2010 to 2016	3.24%	0.79%	7
% Land Protected in Pinelands Area*	80%	37%	5
Assessed Acres of Farmland	6,523	2,408	30
Building Permits Issued	85	33	20
Housing Transactions	305	116	16
Average Home Sale Price	\$276,276	\$295,642	60
Equalized Property Value (millions)	\$3,742.0	\$1,499.2	24
Effective Tax Rate	2.06	2.77	157
Average Residential Property Tax Bill	\$5,592	\$6,195	108
Per Capita Income Estimate	\$34,771	\$37,580	84
Unemployment Rate	5.1%	6.1%	126

Estimated Poverty Rate by Year



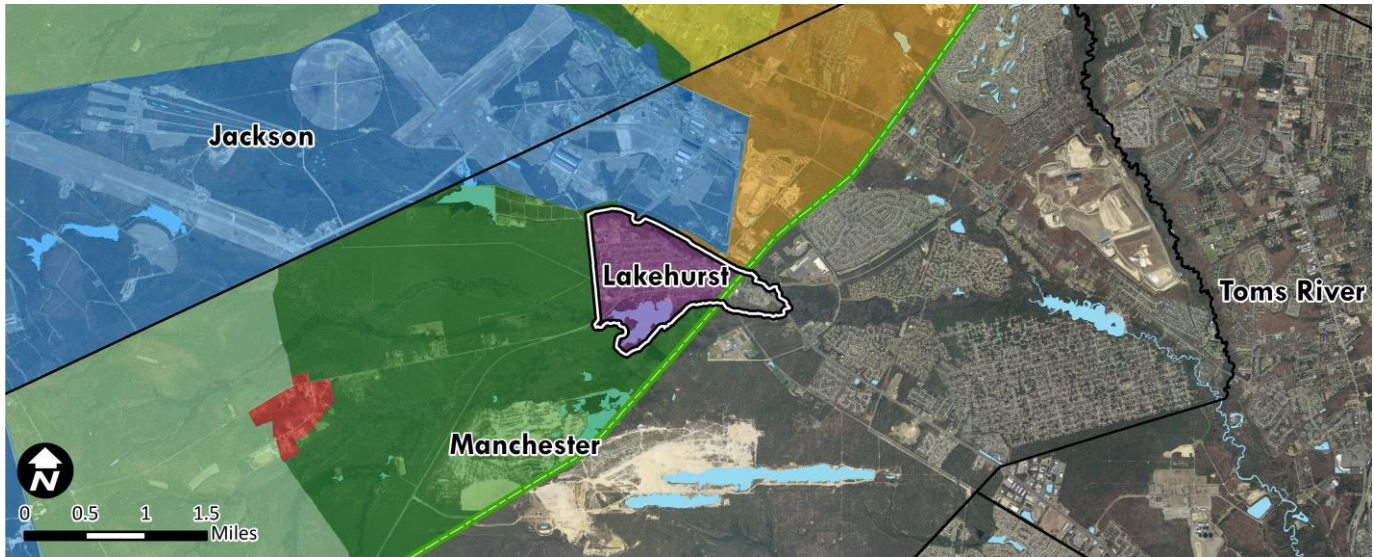
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
5,318	547	\$44,768

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Lacey Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

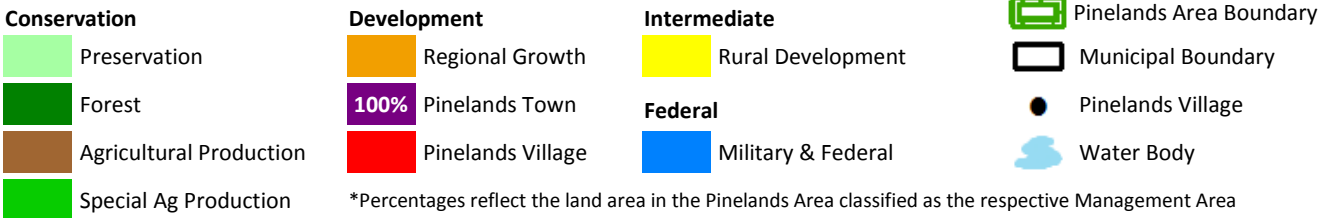
Lakehurst Borough

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

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

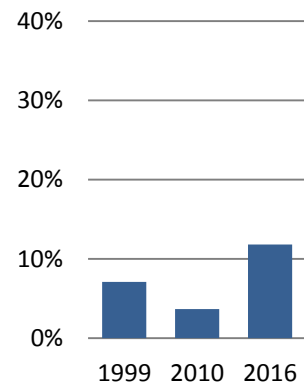


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	2,692	12,049	149
Population Density (per mile ²)	2,747	1,763	52
Population Change - 2010 to 2016	1.39%	0.79%	41
% Land Protected in Pinelands Area*	13%	37%	38
Assessed Acres of Farmland	0	2,408	124
Building Permits Issued	5	33	111
Housing Transactions	15	116	158
Average Home Sale Price	\$169,420	\$295,642	148
Equalized Property Value (millions)	\$158.7	\$1,499.2	174
Effective Tax Rate	2.71	2.77	106
Average Residential Property Tax Bill	\$4,876	\$6,195	147
Per Capita Income Estimate	\$26,841	\$37,580	160
Unemployment Rate	6.9%	6.1%	51

Estimated Poverty Rate by Year



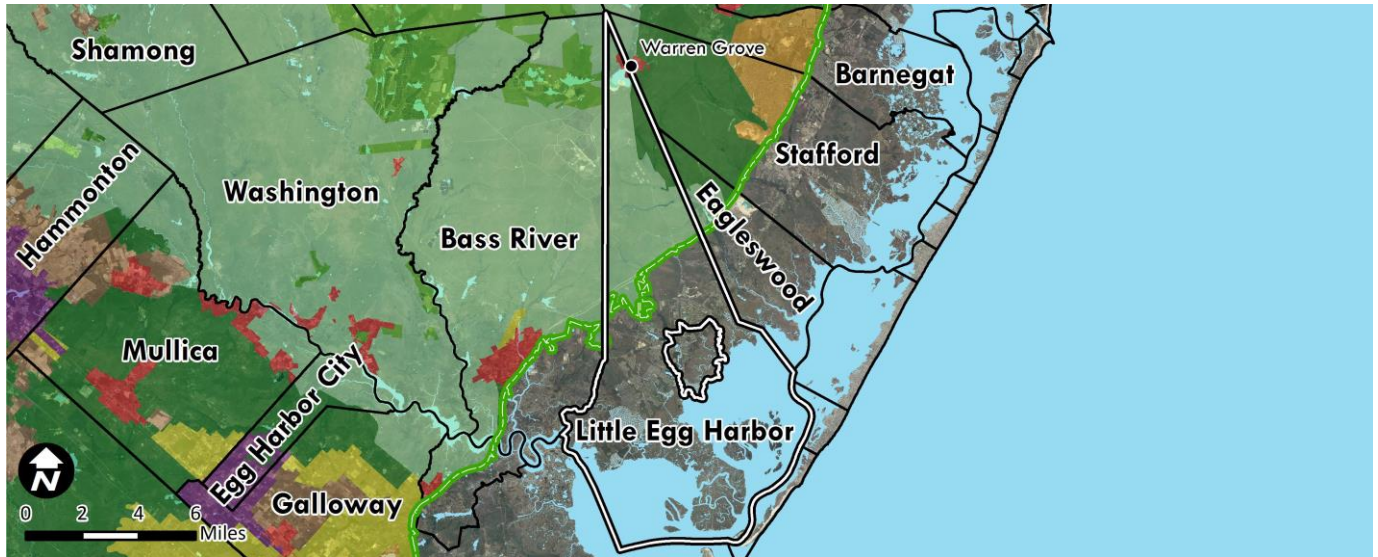
Private Sector Employment 771	Private Sector Establishments 97	Private Sector Avg. Annual Wages \$52,627
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Lakehurst Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

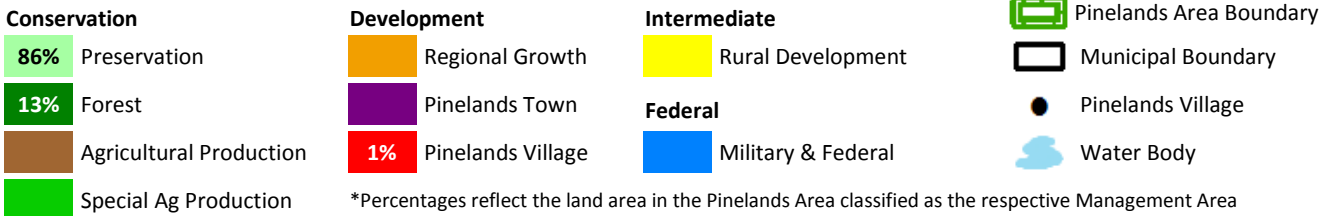
Little Egg Harbor Township

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

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

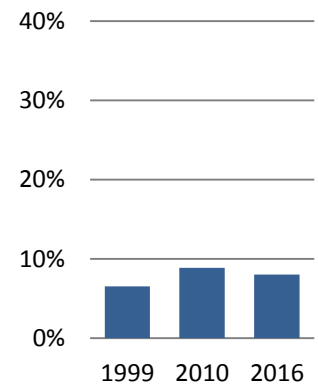


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	20,818	12,049	34
Population Density (per mile ²)	281	1,763	155
Population Change - 2010 to 2016	3.42%	0.79%	12
% Land Protected in Pinelands Area*	86%	37%	3
Assessed Acres of Farmland	598	2,408	82
Building Permits Issued	70	33	29
Housing Transactions	252	116	23
Average Home Sale Price	\$195,880	\$295,642	125
Equalized Property Value (millions)	\$2,286.6	\$1,499.2	38
Effective Tax Rate	2.27	2.77	142
Average Residential Property Tax Bill	\$4,546	\$6,195	165
Per Capita Income Estimate	\$31,327	\$37,580	115
Unemployment Rate	6.4%	6.1%	74

Estimated Poverty Rate by Year



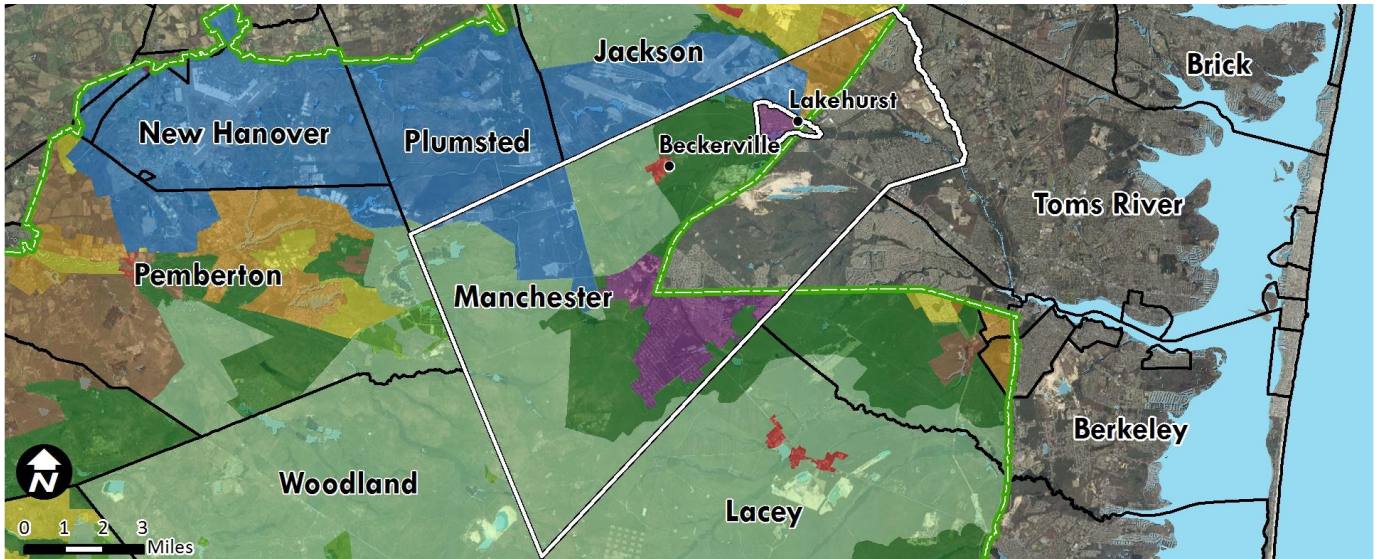
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
2,076	237	\$29,964

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Little Egg Harbor Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

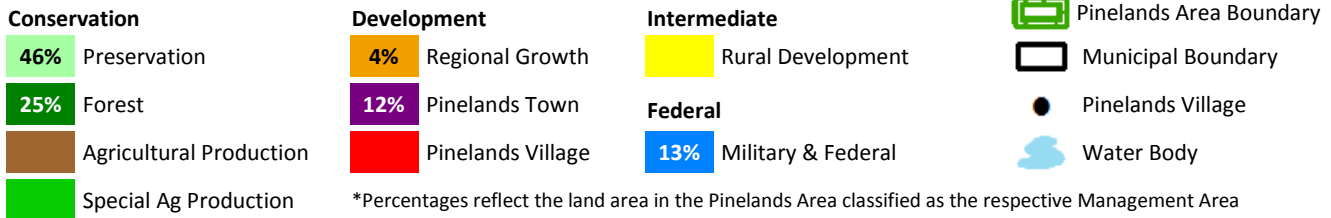
Manchester Township

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

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

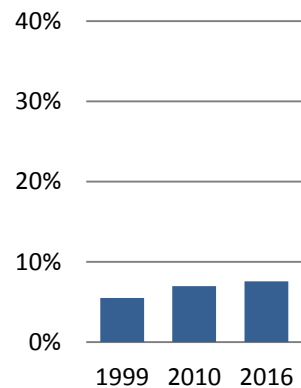


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	43,546	12,049	11
Population Density (per mile ²)	528	1,763	131
Population Change - 2010 to 2016	1.04%	0.79%	19
% Land Protected in Pinelands Area*	55%	37%	16
Assessed Acres of Farmland	4,608	2,408	47
Building Permits Issued	2	33	136
Housing Transactions	551	116	9
Average Home Sale Price	\$178,096	\$295,642	136
Equalized Property Value (millions)	\$3,793.1	\$1,499.2	22
Effective Tax Rate	2.17	2.77	146
Average Residential Property Tax Bill	\$4,000	\$6,195	182
Per Capita Income Estimate	\$30,704	\$37,580	123
Unemployment Rate	6.7%	6.1%	59

Estimated Poverty Rate by Year



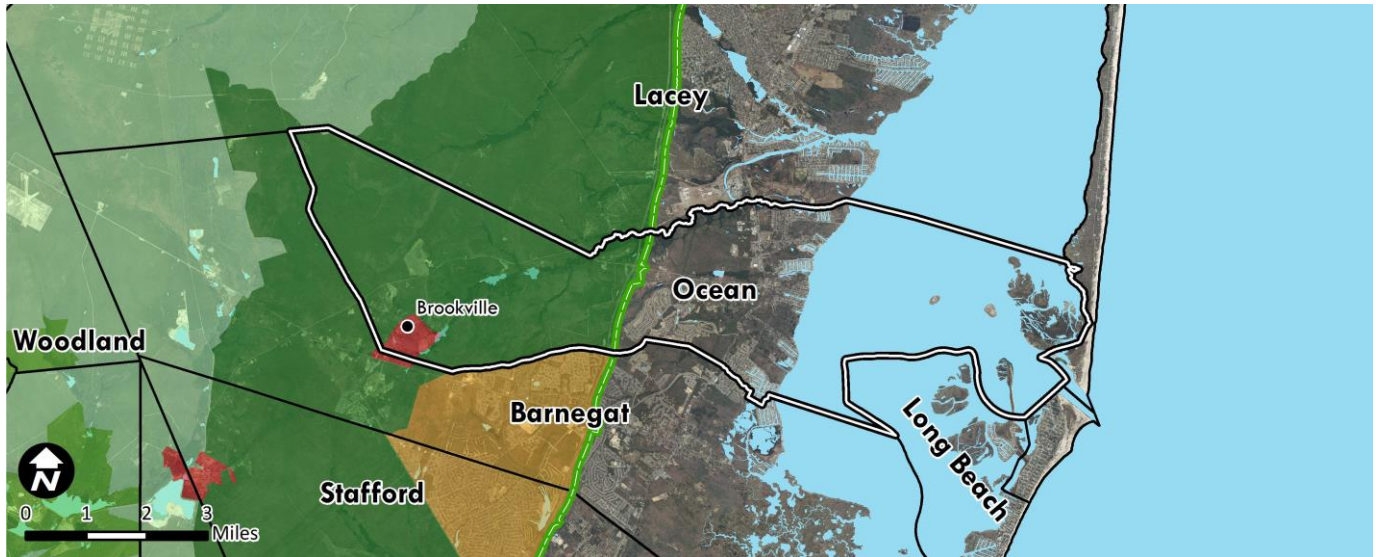
Private Sector Employment 3,843	Private Sector Establishments 321	Private Sector Avg. Annual Wages \$34,797
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Manchester Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Ocean Township

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

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



Pinelands Management Areas

Conservation

- < 1% Preservation
- 96% Forest
- Agricultural Production
- Special Ag Production

Development

- Regional Growth
- Pinelands Town
- 3% Pinelands Village

Intermediate

- Rural Development
- Federal**
- Military & Federal

 Pinelands Area Boundary

 Municipal Boundary

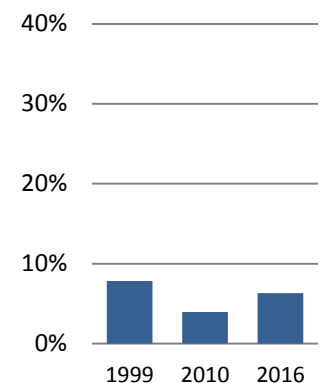
● Pinelands Village

☁ Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	9,013	12,049	71
Population Density (per mile ²)	285	1,763	154
Population Change - 2010 to 2016	7.66%	0.79%	13
% Land Protected in Pinelands Area*	51%	37%	21
Assessed Acres of Farmland	2,006	2,408	63
Building Permits Issued	4	33	120
Housing Transactions	100	116	65
Average Home Sale Price	\$294,618	\$295,642	50
Equalized Property Value (millions)	\$1,379.7	\$1,499.2	61
Effective Tax Rate	1.80	2.77	168
Average Residential Property Tax Bill	\$5,089	\$6,195	133
Per Capita Income Estimate	\$35,564	\$37,580	79
Unemployment Rate	5.9%	6.1%	89

Estimated Poverty Rate by Year



Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
1,246	133	\$29,814

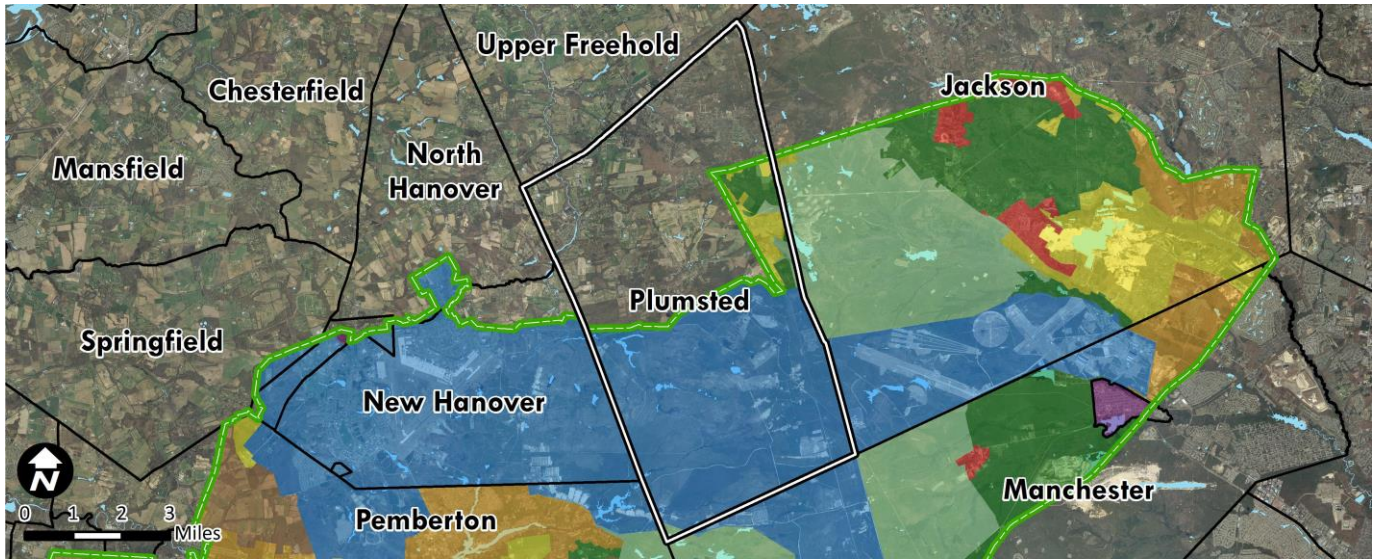
* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Ocean Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Plumsted Township

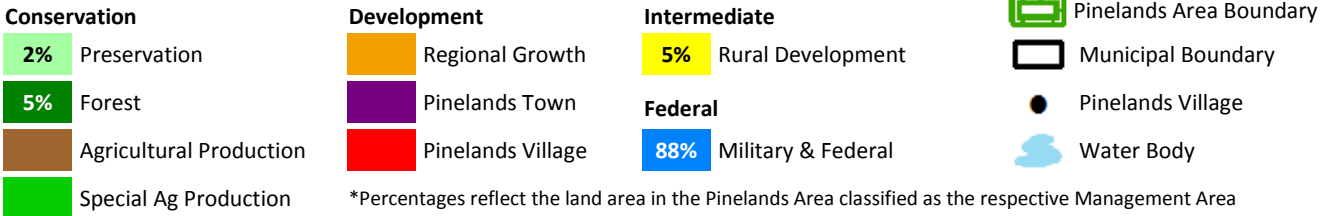


Pinelands Area 2010 population: 451 (5% of total population)

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

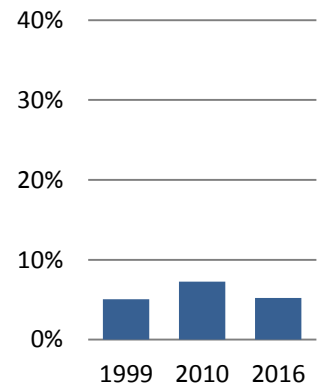


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	8,530	12,049	79
Population Density (per mile ²)	216	1,763	164
Population Change - 2010 to 2016	1.10%	0.79%	33
% Land Protected in Pinelands Area*	6%	37%	42
Assessed Acres of Farmland	5,167	2,408	39
Building Permits Issued	7	33	95
Housing Transactions	60	116	92
Average Home Sale Price	\$311,441	\$295,642	43
Equalized Property Value (millions)	\$853.0	\$1,499.2	88
Effective Tax Rate	2.13	2.77	153
Average Residential Property Tax Bill	\$6,471	\$6,195	73
Per Capita Income Estimate	\$35,122	\$37,580	80
Unemployment Rate	5.2%	6.1%	121

Estimated Poverty Rate by Year



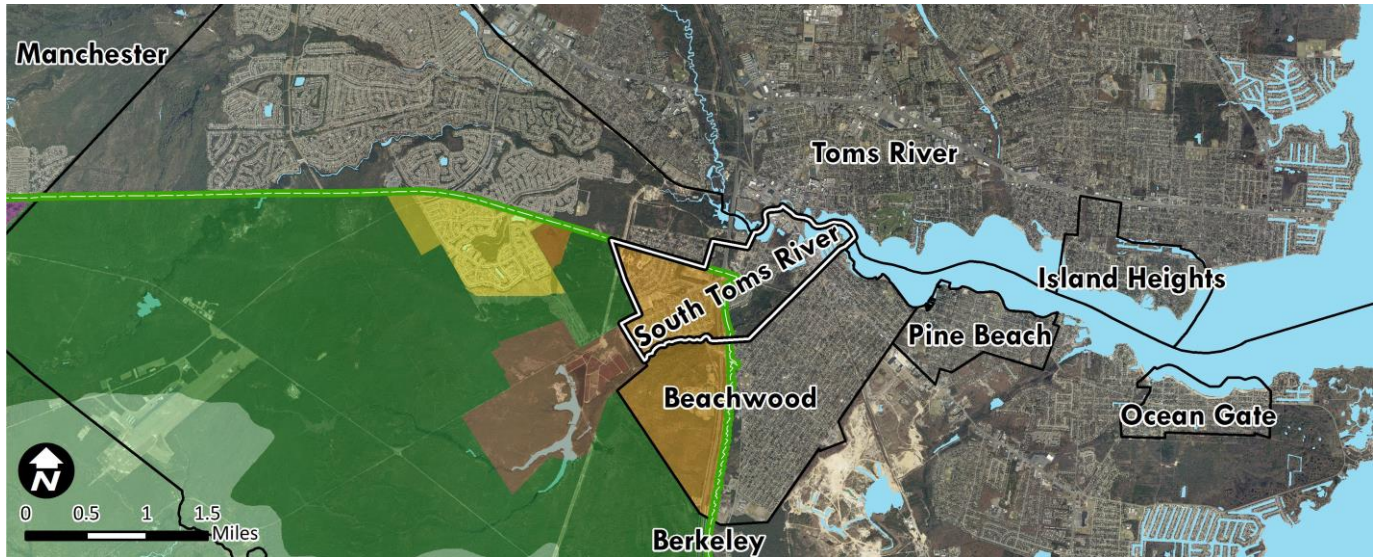
Private Sector Employment 814	Private Sector Establishments 127	Private Sector Avg. Annual Wages \$31,541
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* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Plumsted Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

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

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 100% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- Rural Development
- Federal**
- Military & Federal

Pinelands Area Boundary

Municipal Boundary

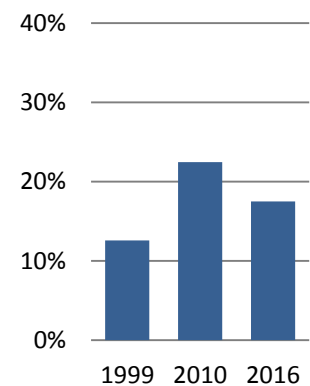
Pinelands Village

Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	3,761	12,049	130
Population Density (per mile ²)	3,058	1,763	45
Population Change - 2010 to 2016	2.03%	0.79%	35
% Land Protected in Pinelands Area*	0%	37%	46
Assessed Acres of Farmland	0	2,408	124
Building Permits Issued	0	33	159
Housing Transactions	10	116	165
Average Home Sale Price	\$164,550	\$295,642	155
Equalized Property Value (millions)	\$221.9	\$1,499.2	163
Effective Tax Rate	2.77	2.77	103
Average Residential Property Tax Bill	\$4,603	\$6,195	160
Per Capita Income Estimate	\$19,882.0	\$37,580	189
Unemployment Rate	7.9%	6.1%	26

Estimated Poverty Rate by Year



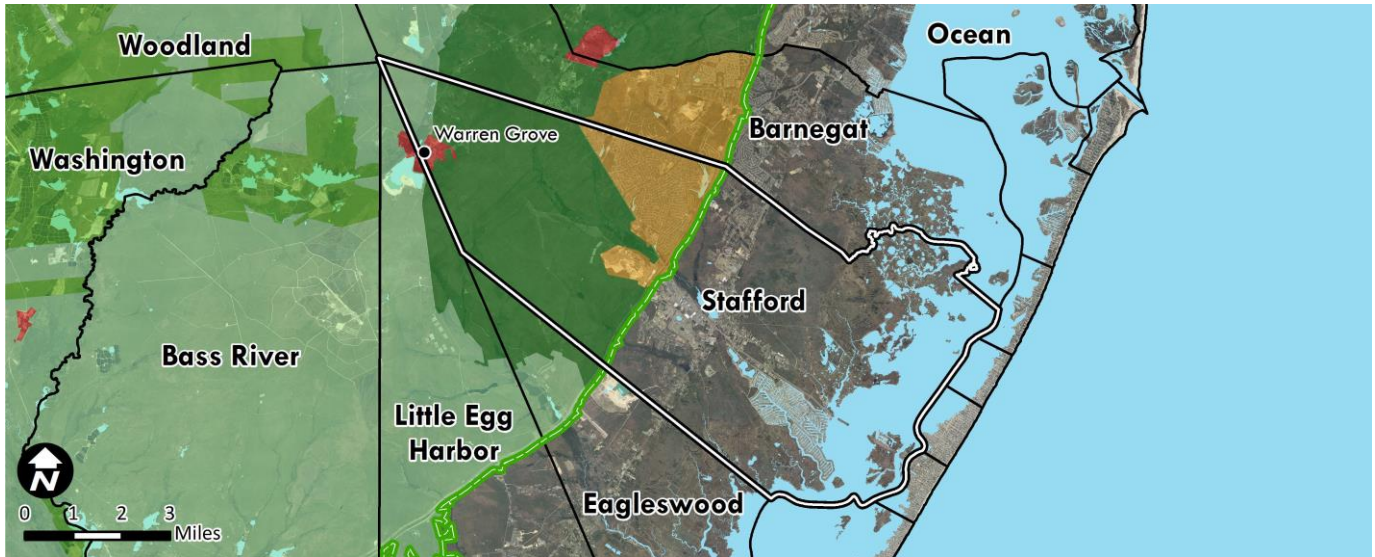
Private Sector Employment	Private Sector Establishments	Private Sector Avg. Annual Wages
478	54	\$35,809

* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For South Toms River Borough it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

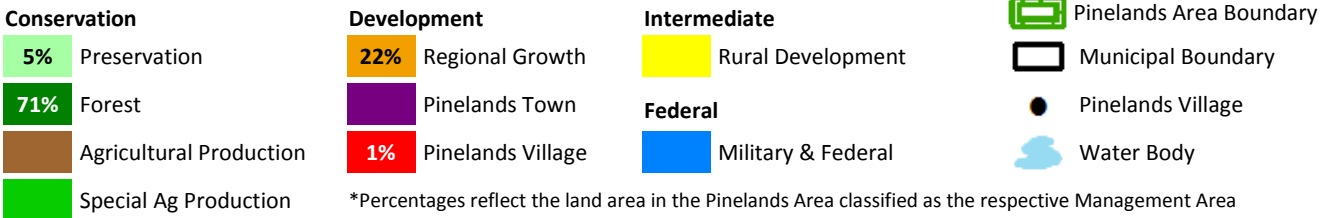
Stafford Township

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

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

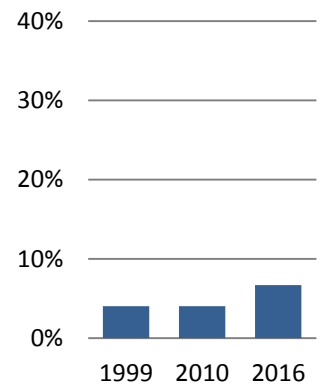


Pinelands Management Areas



2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	27,153	12,049	26
Population Density (per mile ²)	497	1,763	134
Population Change - 2010 to 2016	2.13%	0.79%	15
% Land Protected in Pinelands Area*	70%	37%	9
Assessed Acres of Farmland	547	2,408	84
Building Permits Issued	128	33	11
Housing Transactions	373	116	14
Average Home Sale Price	\$276,258	\$295,642	61
Equalized Property Value (millions)	\$4,180.2	\$1,499.2	18
Effective Tax Rate	2.14	2.77	151
Average Residential Property Tax Bill	\$5,986	\$6,195	91
Per Capita Income Estimate	\$35,576	\$37,580	78
Unemployment Rate	5.3%	6.1%	113

Estimated Poverty Rate by Year



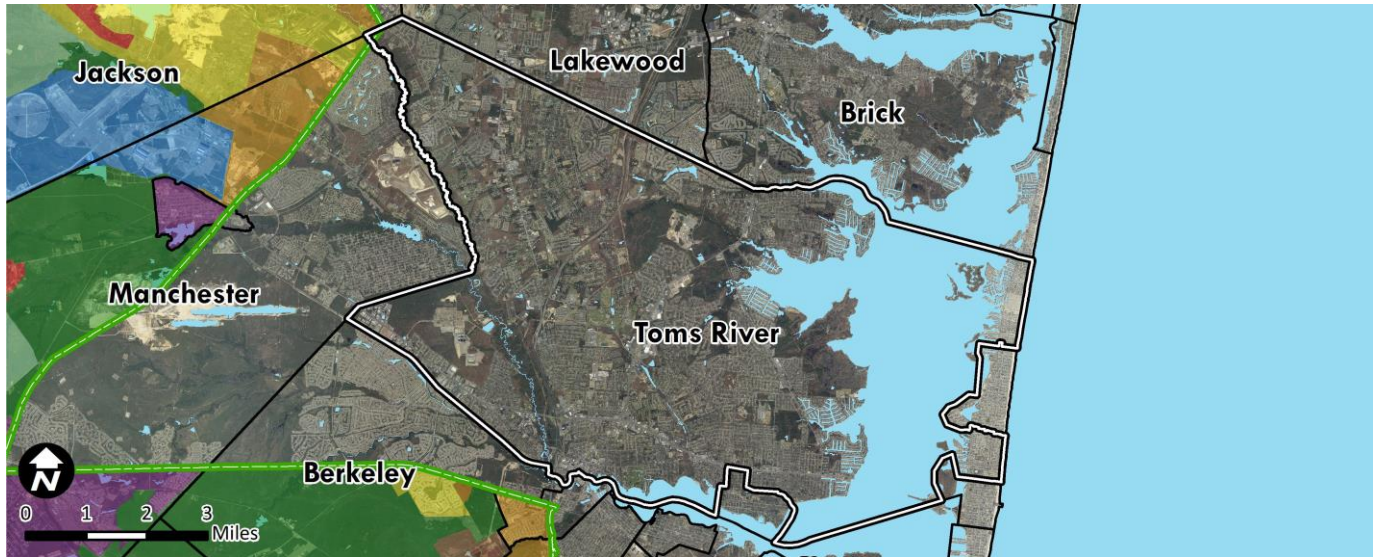
Private Sector Employment 8,036	Private Sector Establishments 623	Private Sector Avg. Annual Wages \$35,989
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*This Figure captures the 53 Pinelands Area municipalities only, not southern New Jersey. It has not been updated for the 2017 LTEM report due to complications with the data.

Toms River Township

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

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



Pinelands Management Areas

Conservation

- Preservation
- Forest
- Agricultural Production
- Special Ag Production

Development

- 100% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- Rural Development
- Federal**
- Military & Federal



Pinelands Area Boundary



Municipal Boundary



Pinelands Village

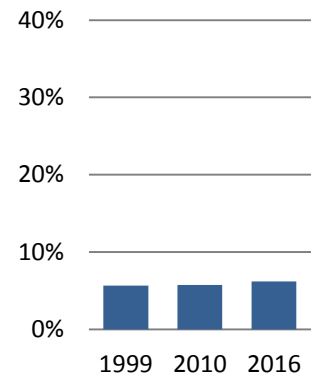


Water Body

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

2016 Variables	Municipal Value	South N.J. Average	South N.J. Rank
Population Estimate	91,837	12,049	2
Population Density (per mile ²)	1,743	1,763	80
Population Change - 2010 to 2016	0.54%	0.79%	18
% Land Protected in Pinelands Area*	86%	37%	1
Assessed Acres of Farmland	311	2,408	87
Building Permits Issued	518	33	2
Housing Transactions	1257	116	1
Average Home Sale Price	\$323,328	\$295,642	40
Equalized Property Value (millions)	\$15,167.5	\$1,499.2	1
Effective Tax Rate	1.85	2.77	166
Average Residential Property Tax Bill	\$5,918	\$6,195	99
Per Capita Income Estimate	\$36,155	\$37,580	72
Unemployment Rate	4.9%	6.1%	138

Estimated Poverty Rate by Year



Private Sector Employment
32,721

Private Sector Establishments
2730

Private Sector Avg. Annual Wages
\$42,283

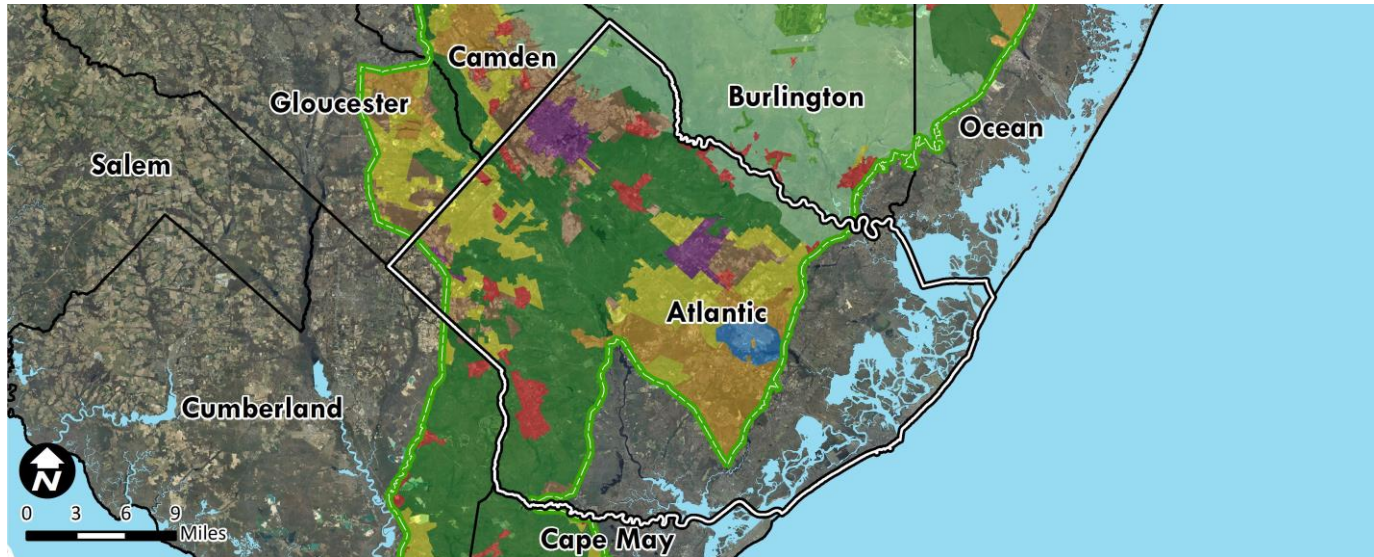
* Protected land captures the 53 Pinelands Area municipalities only, not southern New Jersey. For Toms River Township it is updated to April 2018, in contrast with other variables reported here that are updated to 2016.

Atlantic County

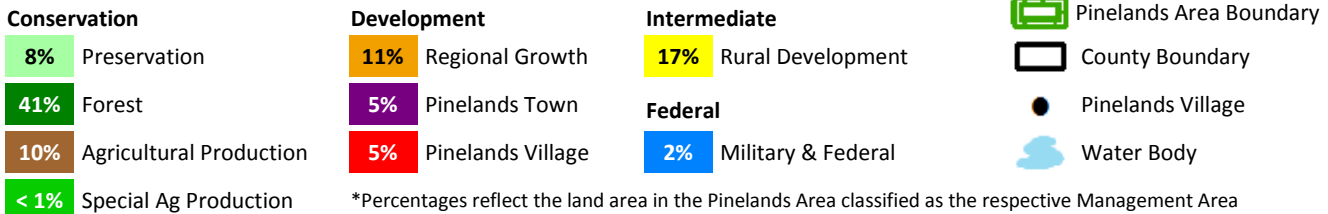


Pinelands Area 2010 population: 105,672 (38% of total population)

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

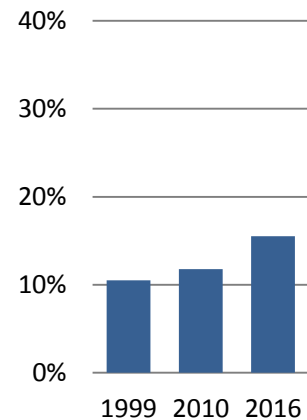


Pinelands Management Areas



2016 Variables	County Value	South N.J. County Avg.*	South N.J. County Rank
Population Estimate	270,991	337,640	5
Population Density (per mile ²)	444	789	5
Population Change - 2010 to 2016	-1%	-0.40%	5
% Land Protected in Pinelands Area	30%	47%	6
Assessed Acres of Farmland	40,252	52,609	4
Building Permits Issued	1,083	942	2
Housing Transactions	2,146	3,309	6
Average Home Sale Price	\$271,465	\$302,998	3
Equalized Property Value (millions)	\$34,910	\$42,560	5
Average Effective Tax Rate	2.69	2.64	5
Average Residential Property Tax Bill	\$5,922	\$5,989	5
Per Capita Income (Estimate)	\$33,394	\$36,649	6
Estimated Unemployment Rate	7.4%	6.4%	3

Estimated Poverty Rate by Year



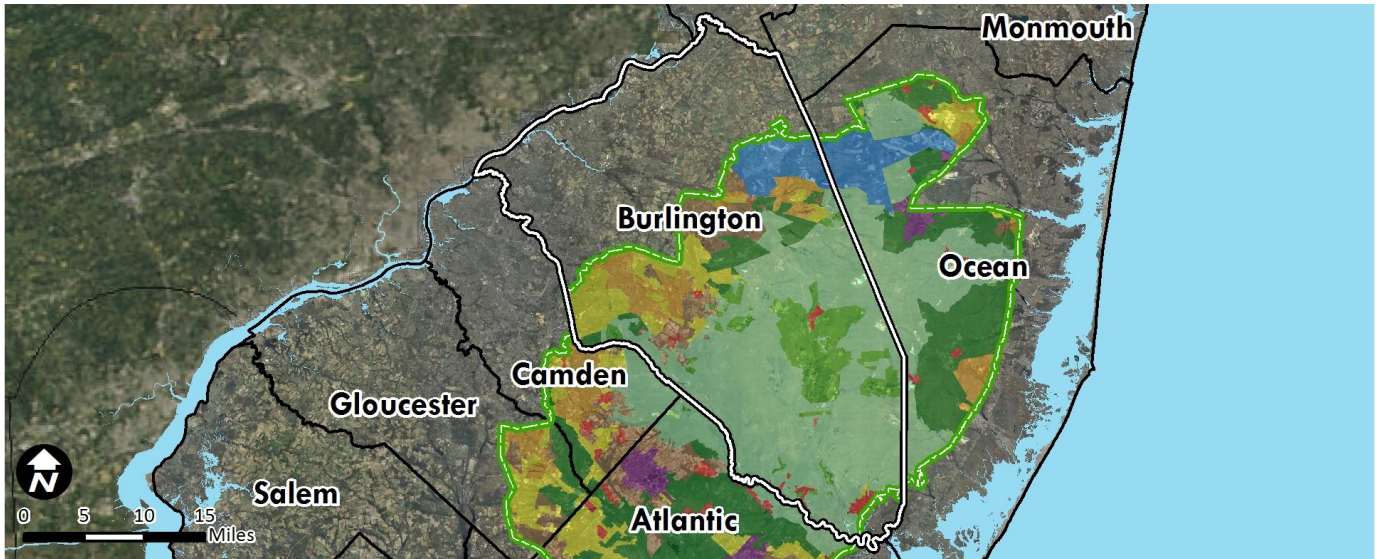
Private Sector Employment 107,020	Private Sector Establishments 6,274	Private Sector Avg. Annual Wages \$36,476
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*This Figure captures the 7 Pinelands Area counties only, not Salem County.

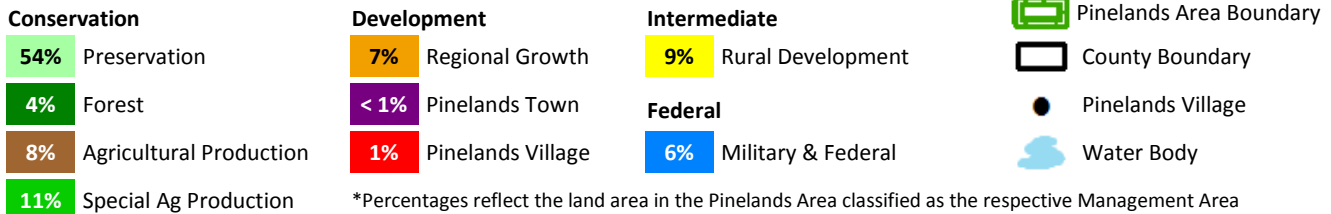
Burlington County

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

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

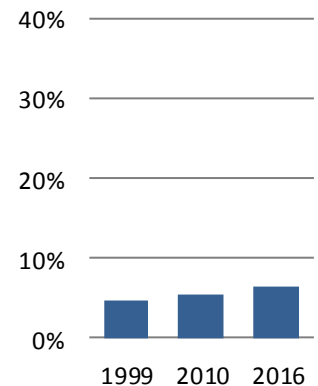


Pinelands Management Areas



2016 Variables	County Value	South N.J. County Avg.*	South N.J. County Rank
Population Estimate	449,284	337,640	3
Population Density (per mile ²)	548	789	4
Population Change - 2010 to 2016	0%	-0.40%	3
% Land Protected in Pinelands Area	59%	47%	2
Assessed Acres of Farmland	126,839	52,609	1
Building Permits Issued	825	942	3
Housing Transactions	3,902	3,309	2
Average Home Sale Price	\$254,966	\$302,998	4
Equalized Property Value (millions)	\$46,366	\$42,560	3
Average Effective Tax Rate	2.7	2.64	4
Average Residential Property Tax Bill	\$6,362	\$5,989	4
Per Capita Income (Estimate)	\$36,069	\$36,649	4
Estimated Unemployment Rate	4.4%	6.4%	7

Estimated Poverty Rate by Year



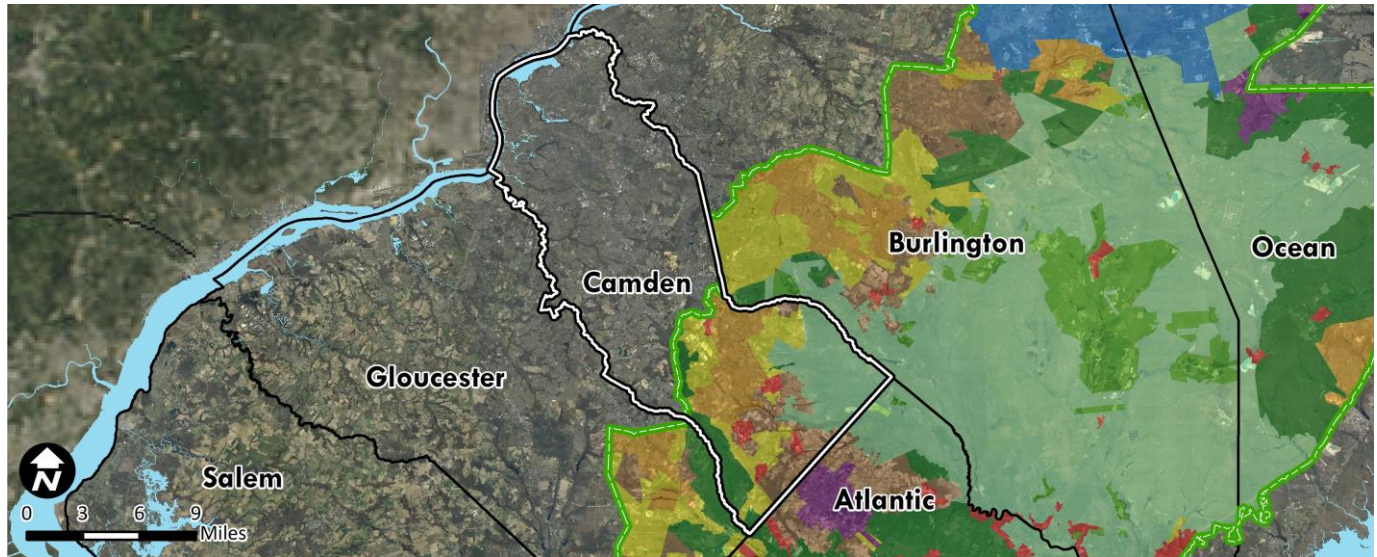
Private Sector Employment 169,000	Private Sector Establishments 10,446	Private Sector Avg. Annual Wages \$43,417
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*This Figure captures the 7 Pinelands Area counties only, not Salem County.

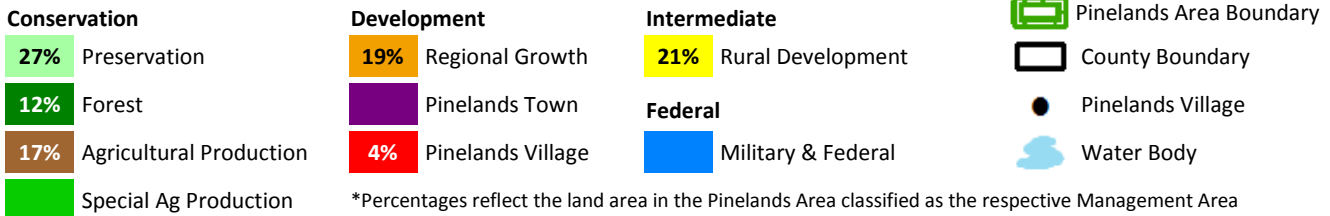
Camden County

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

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

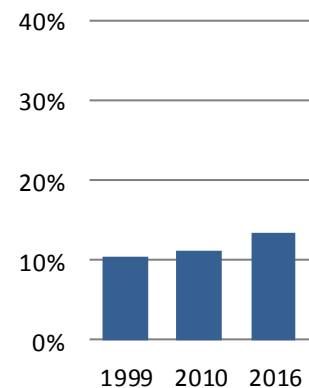


Pinelands Management Areas



2016 Variables	County Value	South N.J. County Avg.*	South N.J. County Rank
Population Estimate	510,150	337,640	2
Population Density (per mile ²)	2,242	789	1
Population Change - 2010 to 2016	-0.70%	-0.40%	4
% Land Protected in Pinelands Area	44%	47%	5
Assessed Acres of Farmland	10,182	52,609	7
Building Permits Issued	553	942	6
Housing Transactions	3,705	3,309	3
Average Home Sale Price	\$181,166	\$302,998	7
Equalized Property Value (millions)	\$37,399	\$42,560	4
Average Effective Tax Rate	3.79	2.64	1
Average Residential Property Tax Bill	\$7,195	\$5,989	1
Per Capita Income (Estimate)	\$47,838	\$36,649	1
Estimated Unemployment Rate	5.5%	6.4%	4

Estimated Poverty Rate by Year



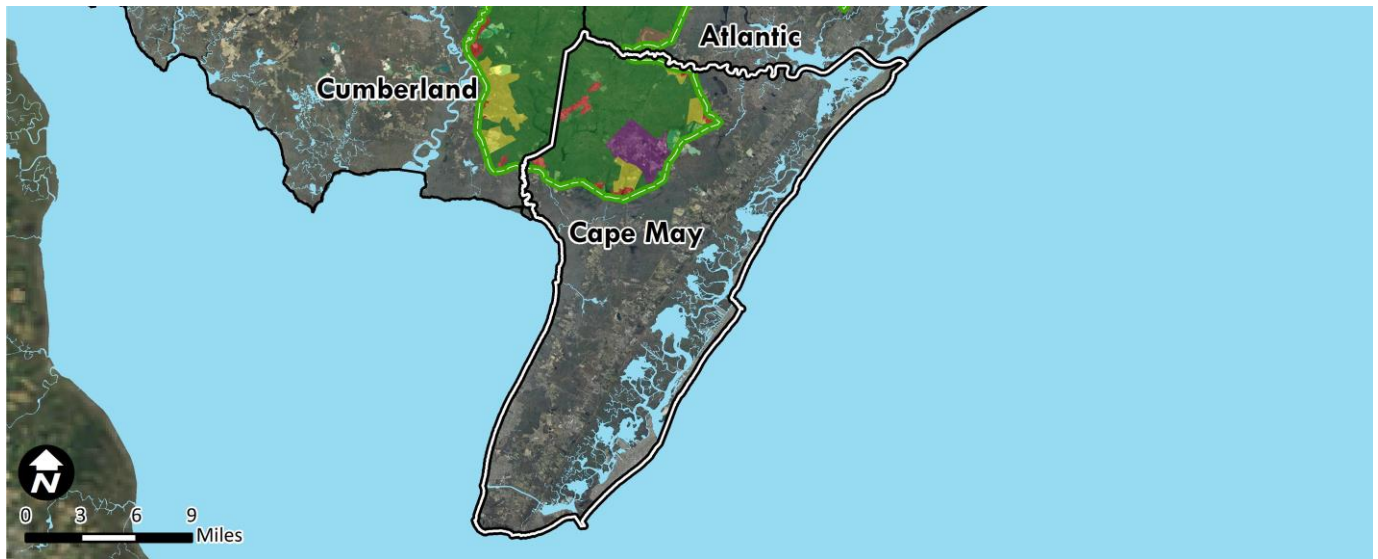
Private Sector Employment 162,532	Private Sector Establishments 11,259	Private Sector Avg. Annual Wages \$38,950
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*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Cape May County

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

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



Pinelands Management Areas

Conservation

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

Development

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

Intermediate

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



Pinelands Area Boundary



County Boundary



Pinelands Village

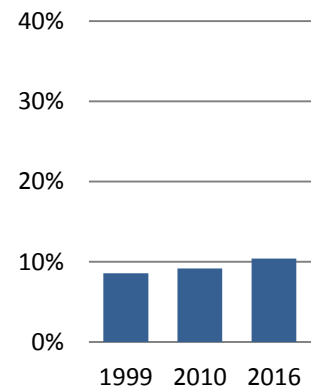


Water Body

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

2016 Variables	County Value	South N.J. County Avg.*	South N.J. County Rank
Population Estimate	94,430	337,640	7
Population Density (per mile ²)	330	789	6
Population Change - 2010 to 2016	-2.90%	-0.40%	7
% Land Protected in Pinelands Area	54%	47%	3
Assessed Acres of Farmland	10,933	52,609	6
Building Permits Issued	642	942	5
Housing Transactions	2,467	3,309	4
Average Home Sale Price	\$501,427	\$302,998	2
Equalized Property Value (millions)	\$48,546	\$42,560	2
Average Effective Tax Rate	1.22	2.64	7
Average Residential Property Tax Bill	\$4,595	\$5,989	6
Per Capita Income (Estimate)	\$39,072	\$36,649	3
Estimated Unemployment Rate	9.8%	6.4%	1

Estimated Poverty Rate by Year



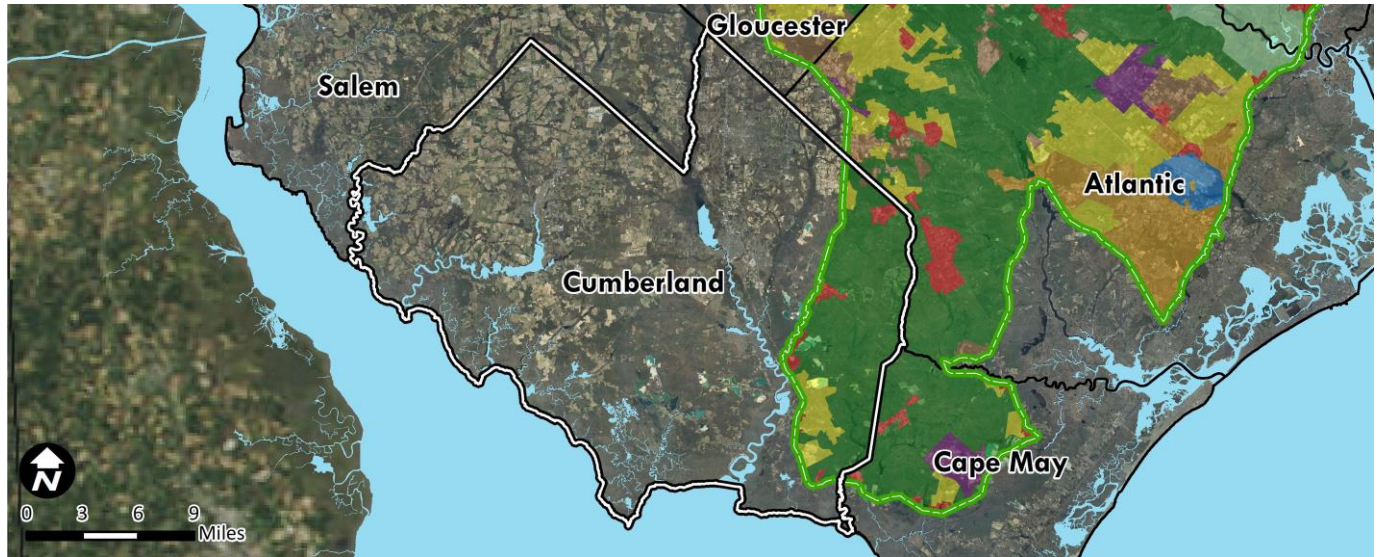
Private Sector Employment 31,892	Private Sector Establishments 3,719	Private Sector Avg. Annual Wages \$29,503
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*This Figure captures the 7 Pinelands Area counties only, not Salem County.

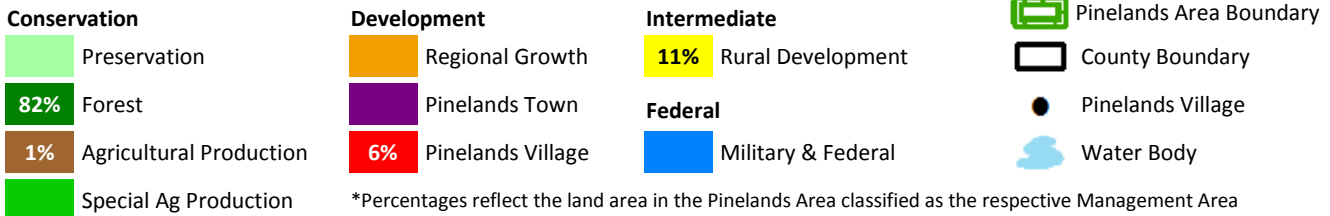
Cumberland County

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

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

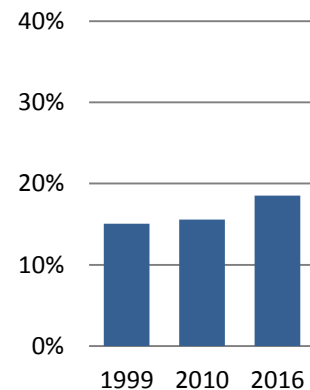


Pinelands Management Areas



2016 Variables	County Value	South N.J. County Avg.*	South N.J. County Rank
Population Estimate	153,797	337,640	6
Population Density (per mile ²)	306	789	7
Population Change - 2010 to 2016	-1.80%	-0.40%	6
% Land Protected in Pinelands Area	53%	47%	4
Assessed Acres of Farmland	91,100	52,609	2
Building Permits Issued	134	942	7
Housing Transactions	760	3,309	7
Average Home Sale Price	\$181,550	\$302,998	6
Equalized Property Value (millions)	\$8,683	\$42,560	7
Average Effective Tax Rate	2.91	2.64	3
Average Residential Property Tax Bill	\$4,203	\$5,989	7
Per Capita Income (Estimate)	\$24,738	\$36,649	7
Estimated Unemployment Rate	7.5%	6.4%	2

Estimated Poverty Rate by Year



Private Sector Employment 45,489	Private Sector Establishments 2,913	Private Sector Avg. Annual Wages \$36,334
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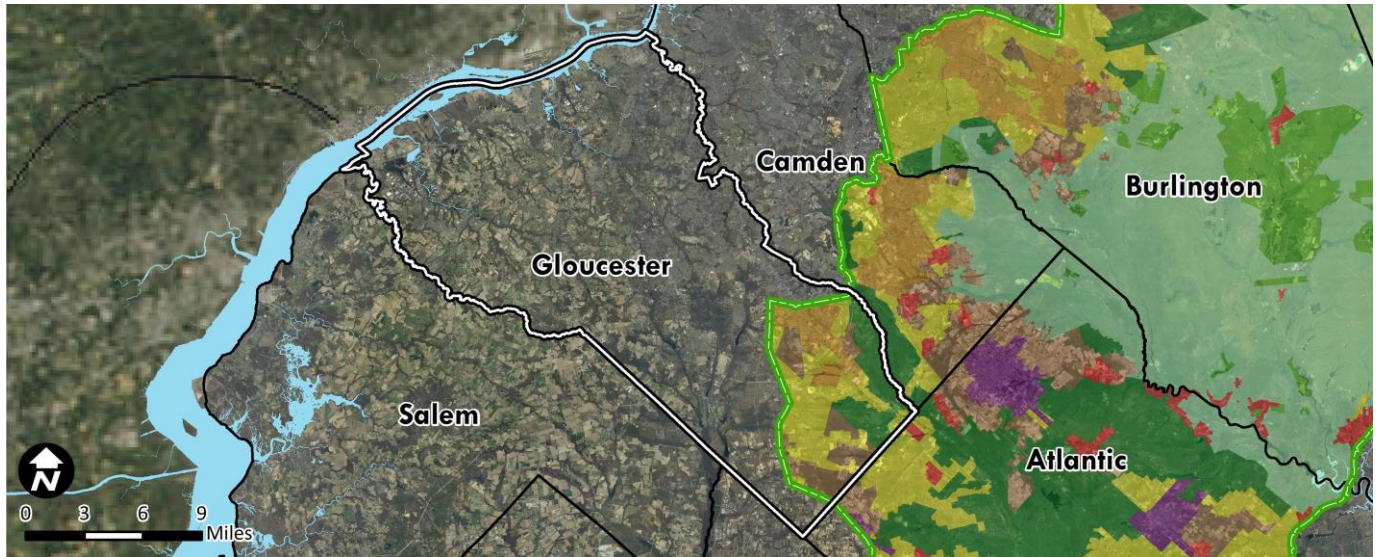
*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Gloucester County



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

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



Pinelands Management Areas

Conservation

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

Development

- 17% Regional Growth
- Pinelands Town
- Pinelands Village

Intermediate

- 38% Rural Development

Federal

- Military & Federal



Pinelands Area Boundary



County Boundary



Pinelands Village

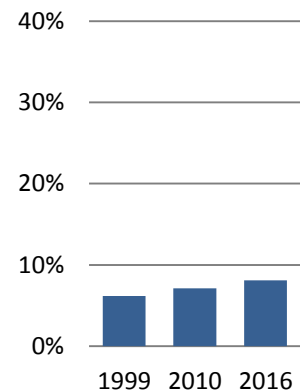


Water Body

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

2016 Variables	County Value	South N.J. County Avg.*	South N.J. County Rank
Population Estimate	292,330	337,640	4
Population Density (per mile ²)	870	789	2
Population Change - 2010 to 2016	1.20%	-0.40%	2
% Land Protected in Pinelands Area	28%	47%	7
Assessed Acres of Farmland	62,954	52,609	3
Building Permits Issued	727	942	4
Housing Transactions	2,418	3,309	5
Average Home Sale Price	\$214,059	\$302,998	5
Equalized Property Value (millions)	\$25,864	\$42,560	6
Average Effective Tax Rate	3.42	2.64	2
Average Residential Property Tax Bill	\$6,785	\$5,989	3
Per Capita Income (Estimate)	\$34,583	\$36,649	5
Estimated Unemployment Rate	5.1%	6.4%	6

Estimated Poverty Rate by Year



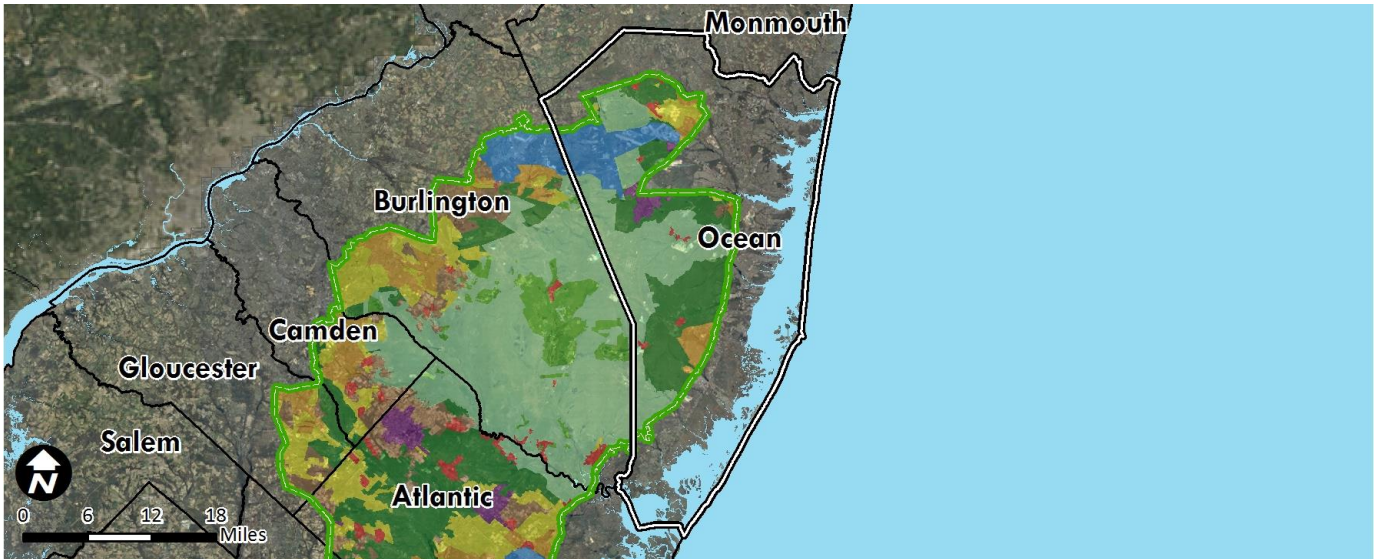
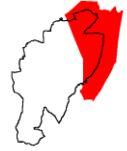
Private Sector Employment 80,894	Private Sector Establishments 5,893	Private Sector Avg. Annual Wages \$40,689
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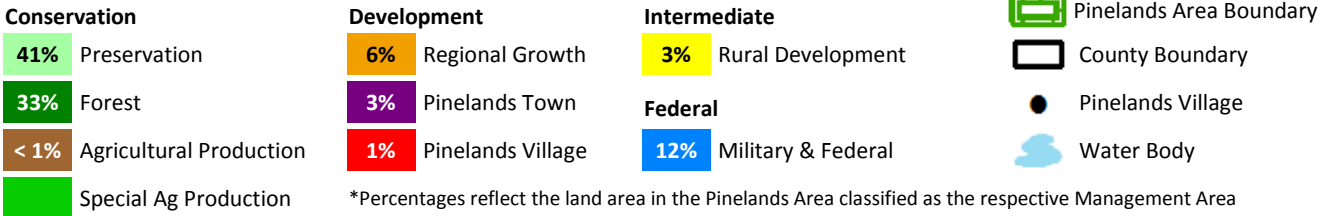
Ocean County

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

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

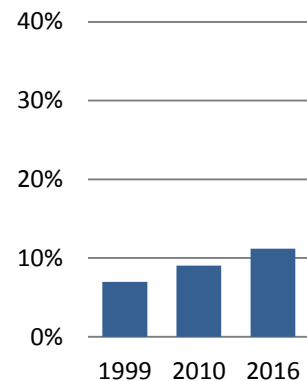


Pinelands Management Areas



2016 Variables	County Value	South N.J. County Avg.*	South N.J. County Rank
Population Estimate	592,497	337,640	1
Population Density (per mile ²)	782	789	3
Population Change - 2010 to 2016	2.60%	-0.40%	1
% Land Protected in Pinelands Area	61%	47%	1
Assessed Acres of Farmland	26,000	52,609	5
Building Permits Issued	2,628	942	1
Housing Transactions	7,764	3,309	1
Average Home Sale Price	\$516,352	\$302,998	1
Equalized Property Value (millions)	\$96,152	\$42,560	1
Average Effective Tax Rate	3.42	2.64	2
Average Residential Property Tax Bill	\$6,862	\$5,989	2
Per Capita Income (Estimate)	\$40,850	\$36,649	2
Estimated Unemployment Rate	5.2%	6.4%	5

Estimated Poverty Rate by Year



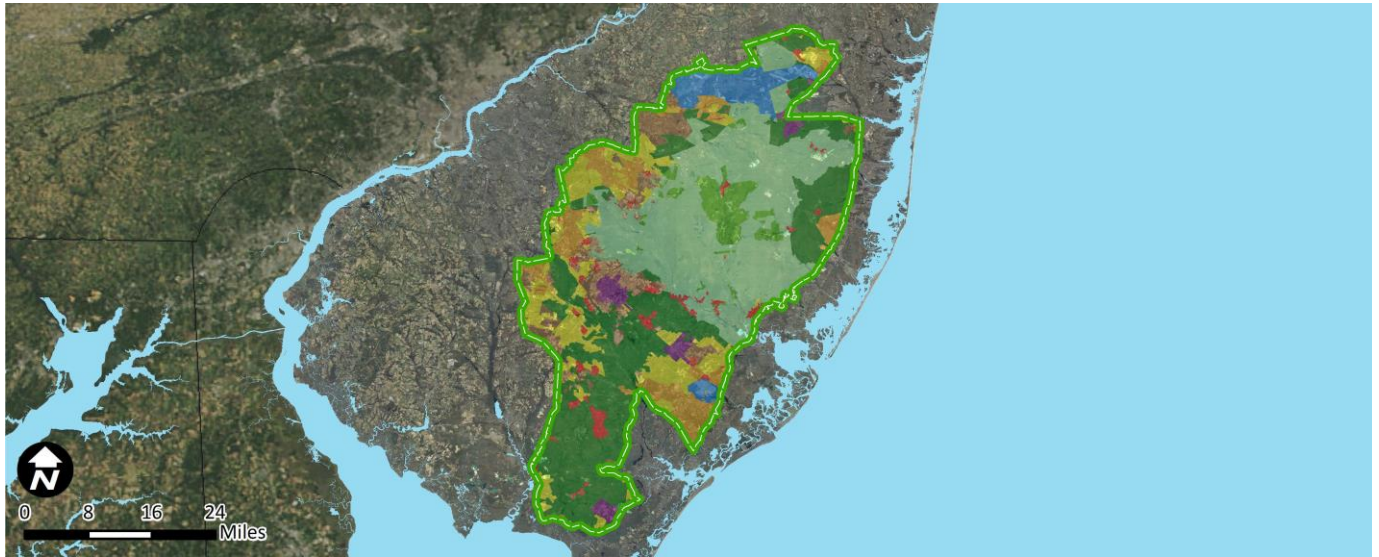
Private Sector Employment 131,169	Private Sector Establishments 12,147	Private Sector Avg. Annual Wages \$33,589
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*This Figure captures the 7 Pinelands Area counties only, not Salem County.

Pinelands Area

Pinelands Area 2010 population: 312,869

Pinelands Area acreage: 938,000



Pinelands Management Areas

Conservation

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

Development

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

Intermediate

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



Pinelands Area Boundary

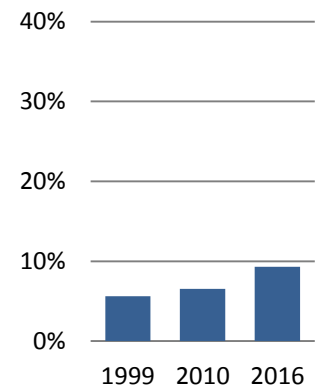


Water Body

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

2016 Variables	Pinelands Municipal Value	Non-Pinelands Municipal Value	New Jersey Value
Population Estimate	703,189	1,723,726	8,915,456
Population Density (per mile ²)	326	996	1,134
Population Change - 2010 to 2016	<1%	<-1%	2%
% Land Protected in Pinelands Area	49%	-	9%
Assessed Acres of Farmland	189,288	297,187	1,017,398
Building Permits Issued	1,553	5,089	26,793
Housing Transactions	6,537	16,953	66,399
Average Home Sale Price	\$236,158	\$309,869	\$395,263
Avg. Equalized Prop. Value (millions)	\$1,478	\$1,506	\$2,140
Average Effective Tax Rate	2.84	2.53	2.35
Average Residential Property Tax Bill	\$5,509	\$6,429	\$8,510
Per Capita Income (Estimate)	\$31,049	\$39,560	\$37,580
Estimated Unemployment Rate	6.5%	5.9%	5.0%

Pinelands Municipalities Estimated Poverty Rate by Year



Private Sector Employment
152,754

Private Sector Establishments
14,230

Private Sector Avg. Annual Wages
\$38,765