

New Jersey Pinelands Commission

Long-Term Economic Monitoring Program



Annual Report

Data including 2010 and 2011

Mark S. Lohbauer, Chairman

Nancy Wittenberg, Executive Director

**NEW JERSEY PINELANDS LONG-TERM ECONOMIC
MONITORING PROGRAM
ANNUAL REPORT
DATA INCLUDING 2010 AND 2011**

April 2013

THE NEW JERSEY PINELANDS COMMISSION

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

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

The Pinelands Commission
P.O. Box 359
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Requests can also be made *via* phone at (609) 894-7300 or email at info@njpines.state.nj.us.

In addition, the Annual Report covering data from 2010 and 2011 is available for review at the following libraries:

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Executive Summary

This report, covering data from 2010 and 2011, provides the results of the ongoing economic monitoring program that tracks economic conditions in the Pinelands Region. The Pinelands is the nation's first federal reserve. Established in 1978, it covers an area of more than one million acres in the heart of southern New Jersey. The Pinelands Comprehensive Management Plan (CMP) was adopted in 1981. The Plan establishes minimum standards for land use throughout the region. These standards are implemented at the local level through municipal ordinances.

This report presents demographic data and describes key trends in the areas of population, real estate, economic growth, and municipal finance. Several core variables are continually monitored in each of these areas every year. The basic unit of analysis is determined by the data. Municipal-level data is available in most cases, and county-level data is utilized where municipal data is not available. The general analytical approach involves comparing economic trends (from 1980 onward) of Pinelands municipalities to other regions outside of the Pinelands Area (i.e., Non-Pinelands in southern New Jersey, southern New Jersey as a whole, and the state).¹ In this report, the "Pinelands" refers to an aggregate of 47 municipalities that have at least 10% of their land area within the state-designated Pinelands Area, which covers 53 total municipalities. The "Non-Pinelands" refers to an aggregate of the remaining 155 municipalities in the eight counties of southern New Jersey. In some instances, certain variables from the United States Census are available below the municipal level at the census-block or census-block group level. Trends inside and outside the Pinelands Area boundary can be distinguished at those sub-municipal geographic levels.

Population

The population of the Pinelands is continuing to grow. The 23rd United States Census was issued in 2010, providing this report with the latest detailed demographic figures. As of 2010, total population in the Pinelands municipalities has reached 698,092 people; a 1.3% increase over the 2009 estimated population and a 13.3% increase since the prior census in 2000. Population estimates for 2011 are posting the Pinelands municipal total at 699,235 residents. Census block data reveals that 312,840 people actually live within the Pinelands boundary; a 13% increase over the 2000 population. This reveals that much of the Pinelands population at a municipal level is just outside of the actual Pinelands Area boundaries. Despite this, the Pinelands municipalities are showing a faster rate of population growth than the Non-Pinelands, southern New Jersey, and the state as a whole.

Age demographics also show that the Pinelands population is aging somewhat faster than that of the Non-Pinelands and New Jersey. The percentage of population 18 years of age and under is 21.9%; a 2.6% decrease since 2000. Residents 65 and older now make up 18% of the Pinelands population; a 1.2% increase. Of the Non-Pinelands population, 24.2% are under 18 (a 1.2% decrease since 2000) and 14.4% are over 64 (a 0.1% decrease). Likewise, the percentage

¹ An ongoing challenge is how to best apportion data in municipalities split by the Pinelands Area boundary.

of state population under 18 fell 1.3% to 23.5% while the percentage 65 and older increased by 0.3% to 13.5%.

Real Estate

The real estate decline in the Pinelands that began in 2004 continued into 2011. During the 2010 to 2011 period, the number of home construction permits issued in the Pinelands dropped by about 21% to an average of 23 permits issued per municipality. Meanwhile, the Non-Pinelands saw only a 8.3% decrease to 19 permits while the number of state and northern New Jersey issued permits increased slightly by about 5% (an increase of one unit) and 14% (an increase of three units), respectively. Real estate transactions in the Pinelands fell for five years straight, until 2010 when property transactions saw an upturn across New Jersey. Residential real estate activity in the Pinelands rose by 37% to 4,440 total transactions in 2010. However, in 2011, total transactions again declined by 28%. The Non-Pinelands fared similarly, showing growth in 2010 (7% to 11,154 transactions) and decline in 2011 by 22%. Spatially, most of the transactions took place along the boundaries of the Pinelands.

Median average home selling prices have also continued to fall. From 2007 to 2011, home values dropped by 20.9% in the Pinelands and by 11.7% in the Non-Pinelands. Home values in the Pinelands were 0.2% lower than the Non-Pinelands homes in 2010. However, in 2011, this reversed and the Pinelands saw median average home values that were 1% higher than the Non-Pinelands (\$224,408 versus \$222,213, respectively).

Economy

Economic recession continues to negatively affect the Pinelands and the state. Per capita income, at \$29,198 in 2010, was lower in the Pinelands than all other regions of the state (\$32,839 in the Non-Pinelands, \$34,858 in New Jersey). However, per capita income of the Pinelands grew at a faster rate from 2000 to 2010 (3.9% in the Pinelands, 2.3% in the Non-Pinelands, -1.4% statewide). Unemployment rates in New Jersey roughly reflected that of the nation as statewide unemployment increased to 9.8% in 2010 and then fell to 9.5% in 2011 (an overall increase of 0.4% from 2009). The southern New Jersey job market continues to be hit slightly harder than the northern New Jersey job market in this recession. The Pinelands unemployment rate reached 10.8% in 2010, but then declined to 10.6% in 2011 (an overall increase of 0.73% from 2009). The Non-Pinelands experienced a similar, but slightly lower increase in unemployment during the two years (+0.71%), finishing with an average rate of 10.8% for 2011.

Employment in 2010 has, predictably, fallen from 2006 levels by 6.2% to 135,357 people employed in the Pinelands. The Non-Pinelands and state employment also declined by 6.8% and 5.5%, respectively. The number of establishments in the Pinelands fell 6.3% to 13,303. Establishments in the Non-Pinelands declined 4.7%, and the state declined 4%. Average annual wages declined across the state, however the Pinelands, with an average annual wage of \$37,003 (down 0.8%), fared better than the Non-Pinelands (\$36,558; down 2.5%) and the state (\$44,847; down 2.0%).

The Pinelands continues to be a major, if volatile, component of New Jersey agriculture. After a significant 23.6% decrease in acres farmed in 2009, the Pinelands farmland acreage increased 6.9% in 2010. For the year 2010, there were 134,750 farmland acres in the Pinelands. Lands protected for wetlands agriculture support two important wetlands crops: cranberries and blueberries. Cranberry value of utilized production rose slightly in 2010 and fell in 2011. In 2010, cranberry value dropped 2.6% and in 2011, value fell 14.8%, with the 2011 value of New Jersey cranberries at \$26 million. Blueberry value fell in 2010 by 5.8% to \$64 million and rose 46.9% in 2011 to \$95 million.

Municipal Finance

Taxes collected are affected by both the valuation of real estate and by the tax rate that individual municipalities apply to private real estate. Average 2011 residential property tax bills of \$4,884 in the Pinelands are lower than those of the state (\$7,730) and the Non-Pinelands (\$5,691). On average, the 47 municipalities with at least 10% of their land in the Pinelands boundary saw their tax bills decrease by 0.7% in 2011. From 2009 to 2011, state-equalized valuation of the Pinelands decreased at a slightly faster rate than the Non-Pinelands and the state (-11.8% vs. -9.9% & -11.4%, respectively). As property values decreased, effective tax rates continued to climb through 2010 and 2011 in the Pinelands, the Non-Pinelands, and the state (increases of 13.1%, 10.9%, & 13.5%, respectively). However, effective tax rates in the Pinelands remain roughly 10.8% lower than those of the Non-Pinelands and 7.4% lower than New Jersey.

Residential taxes make up the largest percentage of tax revenue sources in the Pinelands (84.2%), the Non-Pinelands (77.5%), and New Jersey (77.2%). In terms of percentage of property valuation, the predominant trend in the Pinelands is a gradual decrease in the vacant assessment category as a percentage of total assessment and a gradual increase in the residential category.

In 2010 and 2011, municipal budgets in the Pinelands decreased by 1.8% and 3.6%, respectively; the 2011 combined total budget of the Pineland municipalities is \$584.3 million. Conversely, the Non-Pinelands municipal budgets rose by 0.6% in 2010, but then fell by 2.8% to \$2.3 billion in 2011. Municipal budget per capita in the Pinelands also declined from a 2009 budget per capita of \$897 to \$836 in 2011. The Non-Pinelands per capita budget fell from \$1,355 to \$1,329 during the same period. State-aid continued its long-term decline from 2000 to 2011, as state-aid to the Pinelands and the Non-Pinelands fell by 43% to \$119 per capita and \$133 per capita, respectively.

Special Studies

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

update, expand upon, or retool the methods involved. An evaluation of next steps will be completed for the next annual report.

A second special study is currently taking place that looks to improve the precision and accuracy of the long-term economic monitoring data. Staff is investigating how a geographic information system and alternative data sources can be best used to aid in gathering more precise statistics on those municipalities that are "split" by the Pinelands' border.

Overall, economic and demographic trends in the Pinelands continue to roughly mirror that of the surrounding region. There is no evidence to believe that the Pinelands are in any immediate economic risk based on current data. In fact, the Pinelands are actually performing better than other regions in certain categories and in non-recession times. Through the program's special studies a greater understanding and analysis of economic trends in the Pinelands can be achieved thereby becoming of greater use to the Commission and to local leaders.

1. Introduction

1.1 The Long-Term Economic Monitoring Program

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

Of major interest to land-owners, residents, and businesses in the region is the economic impact of the CMP on land values, real estate markets, local government finances, and the economic performance of farms and businesses. Since the adoption of the CMP in 1981, the Commission has conducted a number of studies to address these issues (see Appendix B). These efforts, while directed at measuring the short-term impacts of the CMP, have recognized the importance of monitoring economic and fiscal impacts during the long term.

As part of its second full review of the CMP, the Commission convened a panel of economic experts in 1992 to review the prior studies and develop recommendations for future Commission efforts. Later that year, the Commission formally endorsed the panel's recommendation to monitor the region's economy on a continuing basis. Consequently, the Pinelands Commission prepared a proposal (July 1994) to the National Park Service (NPS) to institute a long-term economic monitoring program, which 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 after 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 2010 and 2011, is the fourteenth in the series and augments most of the data used to develop the previous reports but also includes a variety of information not found in previous reports. A copy of this *Annual Report* can be obtained on CD-ROM by writing to the Pinelands Commission at P.O. Box 359, New Lisbon, New Jersey 08064. The report is also available on the Pinelands Commission web site at <http://www.nj.gov/pinelands>.

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

1.2 Program Goal and Objectives

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

The program was designed to accomplish several principal objectives:

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

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

1.3 Program Administration

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

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

Pinelands protection policies. The data will also be used for other Commission analyses and independent efforts.

2. Annual Reports

2.1 Data Categories

Ongoing data collection and analysis involves continual monitoring of key economic indicators to establish a historical basis for trend comparison and enable analysis of activity in the Pinelands in relation to regional and statewide patterns. The ongoing reporting of data will allow the Commission to target topics for in-depth research to determine the basis of economic well-being of Pinelands communities and potential cause-and-effect relationships. Data for key variables are collected annually, when possible, and provide information essential to understanding the character of the Pinelands economy. In general, these data are 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 2010 and 2011, does not include new supplemental data, but the practice will likely resume with the *2013 Annual Report*. Supplemental variables can provide valuable information and insight into the Pinelands and regional economy. They are not considered core variables because they cannot be updated regularly. For instance, the United States Census data is extremely valuable, but since it is only updated every 10 years, most of it cannot be considered core. If reliable data can be obtained for a sufficient period of time, supplemental variables can become core in the future.

2.2 Core Variables

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

Population

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

Real Estate

The issue of land values is at the heart of many of the controversies generated by the implementation of the Pinelands' land-use regulations. To the extent that development controls affect the value of land, current and prospective landowners will be affected, as will tax 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. Building permits, median selling price of homes, and volume of residential real estate transactions are the three variables tracked annually for this variable group.

Economy

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

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

Municipal Finance

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

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

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

Table 2.2 Summary of Core Variables in Annual Report

| Name | Years Collected ³ | Years Added ⁴ | Frequency of Collection | Method of Analysis |
|---|------------------------------------|--------------------------|-------------------------|---|
| Municipal Population | 1980, 1990, 2000 | 2010 | Decennial | Inside/Outside Pinelands |
| Census Block Population | 1990, 2000 | 2010 | Decennial | Census Block, Inside/Outside Pinelands Boundary |
| Age Demographics | 1980, 1990, 2000 | 2010 | Decennial | Inside/Outside Pinelands, Census Block Group (2000) |
| Population Estimates | 2001-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |
| Building Permits | 1980-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |
| Median Selling Prices of Homes | 1988-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |
| Volume of Real Estate Transactions | 1988-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |
| Retail Sales & Establishments | 1992, 1997, 2002, 2007 | None | Quintennial | County, Place |
| Income | 1979, 1989, 1999 | 2010 | Decennial | Inside/Outside Pinelands |
| Unemployment | 1980-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |
| Employment | 1993-1999, 2003 (municipal level) | 2010 (county level) | Annual | Inside/Outside Pinelands (93-99), County (91-02) |
| Number of Establishments | 1993-1999, 2003 (municipal level) | 2010 (county level) | Annual | Inside/Outside Pinelands (93-99), County (91-02) |
| Payroll by Major Industry Sector | 1993-1999, 2003 (municipal level) | 2010 (county level) | Annual | Inside/Outside Pinelands (93-99), County (91-02) |
| Farmland Assessed Acreage | 1980-1984, 1986-2009 | 2010 | Annual | Inside/Outside Pinelands |
| Agricultural Census Data | 1982, 1987, 1992, 1997, 2002, 2007 | None | Quintennial | County |
| Blueberry and Cranberry Production | 1972-2009 | 2010 & 2011 | Annual | State |
| Average Residential Property Tax Bill | 1983-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |
| Equalized Property Value | 1980-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |
| Effective Tax Rate | 1980-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |
| Assessment Class Proportions in Municipal Valuation | 1980-1994, 2002-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |
| Local Municipal Purpose Revenues | 1995-2009 | 2010 & 2011 | Annual | Inside/Outside Pinelands |

³ Data acquisition is based on the availability of data. An effort is made to acquire data for every year available from 1980 to the present.

⁴ Refers to addition from previous report and specifies which years of data are new in this update.

2.3 Supplemental Variables

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

2.4 Geographic Scale: Defining the Pinelands

Concise definitions of the various levels of geography used in this report can be found on page 15, 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, since this is typically the most precise level of geography available. Municipal values are aggregated into the Pinelands and the Non-Pinelands regions, based on a "10% rule." Any municipality with at least 10% of its land in the Pinelands Area is considered to be in the Pinelands region and is referred to as a Pinelands municipality; all remaining municipalities in southern New Jersey (those located in the seven counties mentioned above, plus Salem County) are considered to be in the Non-Pinelands region. Of the 53 municipalities completely or partially located in the Pinelands Area, 47 were classified as inside, while six⁵ were classified as outside, joining the remaining 149 municipalities located entirely outside the Pinelands. In summary, the "Pinelands," as used in this report, refers to 47 municipalities that have at least 10% of their land in the state-designated Pinelands Area, while the "Non-Pinelands" refers to the remaining 155 municipalities of southern New Jersey.

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

Obtaining data at a sub-municipal level circumvents this problem. For instance, the population for each municipality in the Pinelands was calculated at the block level to obtain population counts for areas of Pinelands municipalities inside and outside the Pinelands Area boundary. For example, in 2000 the results of the count showed that approximately 277,000 people lived inside the Pinelands Area boundary, while approximately 413,000 people lived outside the boundary, but within Pinelands municipalities. For Pinelands municipalities, population growth between 1990 and 2000 was 5.5% inside the boundary, and 14.3% outside the

⁵ The six are: Corbin City, North Hanover Township, Springfield Township, Berlin Borough, Vineland City, and Toms River Township.

boundary. Clearly, the Pinelands aggregates are including a fair amount of activity actually happening in the Non-Pinelands. Additional data at the census block and census block group level is being sought. Other methods of obtaining sub-municipal data are also being explored, such as using a geographic information system to pinpoint variables with address information to streets, so an inside / outside boundary count can be made. For variables where sub-municipal census data is available, the terms “Pinelands Municipal Area Inside the Boundary,” and “Pinelands Municipal Area Outside the Boundary,” are used to refer to the areas of Pinelands municipalities that are split by the state-designated Pinelands Area boundary.

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

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

2.5 Presentation of Data

Data in the *Annual Report* is arranged by variable and grouped into four main sections. Each core variable is designated by section (population, real estate, economy, and municipal finance) and by number. When a new section begins, numeration restarts at 1. For instance, there are population variables 1 through 4, Real Estate variables 1 through 3, etc. Numbers followed by an “S” indicate supplemental variables. Supplemental variables always appear at the end of a section. A checkbox in the upper right hand corner of the page indicates whether a variable was updated since the last report. A variable is considered updated if additional years of recent data were added or further analysis of previous data was conducted.

The Pinelands and the Non-Pinelands aggregates are charted, along with southern New Jersey and state averages. Data is obtained as far back as 1980, when possible. In most cases,

averages for each region are calculated by averaging the values for all municipalities in the region. In a few instances, values are not averages but are sums for the region.⁶ For example, retail establishments per capita for each region is calculated by dividing the total population of the region by the total number of establishments in each region. It is not calculated by averaging the ratio of each municipality to get a regional average.

Data is presented by Pinelands municipality for some variables in the form of tables, and certain variables are mapped for all of southern New Jersey. While the aggregates provide a regional picture, the tables and maps illustrate the degree of variation that exists among the municipalities. Tables display and sort data for the 47 “inside” municipalities, and record data for five⁷ 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 2011 dollars. This is an update from the *2010 Annual Report*, where variables were keyed to the 2009 CPI. Only sections that received a substantial update this year (as indicated by a check mark in the upper right hand corner “Update” box) have been adjusted to the 2011 CPI. Variables in the Fact Book are not inflation adjusted, as the purpose is to display the most recent information available and not to monitor change over time.

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

The Municipal Fact Book was a new addition to the *2002 Annual Report*, and was significantly updated and enhanced for the *2003* and *2004* reports. Economic data are arranged by municipality rather than by variable, in order to provide a better understanding of the unique economic characteristics of each municipality. The fact sheets are arranged alphabetically by county, then by municipality. Variables for each municipality are listed beside the average value for all municipalities in southern New Jersey and the municipality’s rank for that variable among the 202 municipalities in southern New Jersey. Additional information, such as census block data, population graphs, and map of development zones, is also provided. 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.

⁶ See “Unit of Analysis” for each variable to ascertain whether municipal averages or regional sums are used.

⁷ The five municipalities counted as “outside” the Pinelands in this report have between one and ten percent of their land in the Pinelands.

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 1990s.

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. Previous years studies are listed in Appendix B.

Continuing Study: Split Town Study

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

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

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

Continuing Study: Indicators of Municipal Health (Update underway)

At its September 1999 meeting, the Pinelands Municipal Council unanimously recommended that the Long-Term Economic Monitoring Program conduct a special project to identify and characterize municipalities experiencing poor health. Although difficult to define, poor municipal health can generally be described as being below a given standard with respect to municipalities' social, economic, physical, and fiscal conditions. The project is being administered by Pinelands Commission staff and conducted in consultation with the Pinelands Municipal Council.

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

In January 2001, a short questionnaire was administered to municipal officials (i.e., mayors, CFO's, administrators, council members, etc.) of 36 municipalities.⁸ The questionnaire was designed to reveal municipal officials' opinions on indicators of fiscal health and on ways to measure and compare fiscal health among municipalities. In general, the results of the questionnaire suggest that the most pressing municipal health concerns of the Pinelands municipalities relate to a healthy tax base (i.e., a mix of commercial, industrial, and residential land), tax rates, and school costs. These themes are being examined more closely during the course of this project.

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

After peer review, a final draft for this study was presented to the Public and Governmental Programs Committee of the Pinelands Commission in July 2008. The report was then distributed to State agencies for comment; however no comments have been received. A copy of this document is available for public review on the Pinelands Commission's web site. The final model to measure fiscal stress will use principal components analysis to arrive at a single fiscal stress number for all 566 municipalities in New Jersey. Principal components analysis is an objective, statistical approach that combines several different variables into a single measurement (in this case, overall fiscal health). This method has been 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

⁸ 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.

findings show that the most severely stressed municipalities in the Pinelands region rank among the top 10% of municipalities statewide in regards to fiscal stress.

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

4. LTEM Annual Report of Indicators

Geographic Definitions

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

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

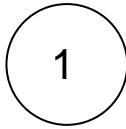
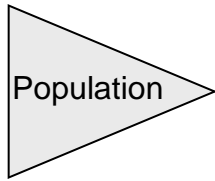
Non-Pinelands: the remaining 155 municipalities in southern New Jersey that have less than 10% of their land in the state-designated Pinelands Area (6 municipalities have between 0.1% and 9% in the Pinelands, the remaining 149 have no land in the Pinelands).

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

State of New Jersey: data for the state as a whole that includes southern (202 municipalities) and northern (364 municipalities) New Jersey (566 municipalities, total).

Pinelands Municipal Area Inside the Pinelands Boundary: all census blocks or census block groups that have their geographic center within the state-designated Pinelands Area. Provides the most accurate measure of activity in the Pinelands. Available in limited instances.

Pinelands Municipal Area Outside the Pinelands Boundary: all census blocks or census block groups that have their geographic center outside the state-designated Pinelands Area, but within a municipality that has at least 1% of its land within the state-designated Pinelands Area. Available in limited instances.



Population

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



↓
Box checked if updated in 2011 - 2012 Report

- Population growth in the Pinelands outpaced the Non-Pinelands in every decade between 1980 and 2010.

Population and Change from 1980 - 2010

| Region | 1980 | 1990 | 2000 | 2010 | Change 1980-1990 | Change 1990-2000 | Change 2000-2010 | Change 1980-2010 |
|---------------|-----------|-----------|-----------|-----------|------------------|------------------|------------------|------------------|
| New Jersey | 7,365,011 | 7,730,188 | 8,414,350 | 8,791,894 | 5.0% | 8.9% | 4.5% | 19.4% |
| Southern NJ | 1,854,074 | 2,083,938 | 2,263,516 | 2,422,041 | 12.4% | 8.6% | 7.0% | 30.6% |
| Non-Pinelands | 1,430,609 | 1,534,417 | 1,647,532 | 1,793,949 | 7.3% | 7.4% | 4.6% | 20.5% |
| Pinelands | 423,465 | 549,521 | 615,984 | 698,092 | 29.8% | 12.1% | 13.3% | 64.9% |

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.

Unit of Analysis: Population data are compiled at the municipal level and aggregated to allow for inside/outside the Pinelands, regional, and statewide analyses.

Summary of Previous Findings

The percentage increase in population was much higher in the Pinelands (30%) than outside (7%) from 1980 to 1990. Both areas surpassed the statewide increase in population of approximately 5% over the decade. A separate analysis of trends by county found that Atlantic County had the greatest differential between inside and outside growth rates from 1980 to 1990, which was most likely due to the start of casino gambling in Atlantic City and associated growth in nearby communities. The percentage increase in population was higher in the Pinelands than outside from 1990 to 2000 (although in absolute terms, population increased more outside the Pinelands over the same period); however, the disparity between inside and outside the Pinelands annual growth rates decreased.

From 1990 to 2000, population growth was higher in the Pinelands (12.1%) than all other regions of the state. Population growth was highest in municipalities located along the edge of the Pinelands, especially those located in the northern and eastern regions. Stafford Township, Jackson Township, and Galloway Township grew the most in terms of percentages. However, a large portion of population growth in these towns occurred outside the Pinelands Area boundary (see next section on population by census block).

Group quarters, housing where unrelated persons live together, are classified as institutional (prisons and mental hospitals) and non-institutional (military bases, colleges and universities, nursing homes, and shelters). Changes in group quarters population, can easily distort the actual change in the number of residents as the relocation of the individual is often because of external forces. For example, in 2010, 93% of Woodland Township's population decrease (826 persons out of 893) was due to a decrease in the institutional population. Likewise, the population of Washington Township decreased while the number of persons in group quarters increased, masking the "actual" decrease in residents.

Update

Once again in 2010, the percentage increase in population in the Pinelands (13.3%) was higher than outside (4.6%) and the disparity has grown. Population growth was also higher in the Pinelands than in the state overall from 2000 to 2010. The 30-year rate of growth (64.9%) was almost three times the rate of growth than that outside the Pinelands or New Jersey as a whole.

As figure P1 illustrates, population growth was generally highest in municipalities located along the edge of the Pinelands, especially those located in the eastern regions. Nine Pinelands municipalities grew more than 20% from 2000 to 2010: Egg Harbor Township, Hamilton Township, Weymouth Township, Barnegat Township, Little Egg Harbor Township, Jackson Township, Monroe Township, Ocean Township, and Woodland Township (Table P1a). However, a large portion of population

growth in these towns occurred outside the Pinelands Area boundary (see next section P2 on population by census block group). In addition to significant growth, Woodland Township's group quarters population makes up about 26.5% of its total. Three other municipalities have a high percentage in group quarters: New Hanover Township at 77%, Maurice River Township at 55.2%, and Woodbine Borough at 20.1%.

An examination of group quarters population (Table P1c) adds additional insight into population change within certain Pinelands municipalities. Several municipalities have been impacted by changes in group quarters population, which distorts the actual change in the number of residents. Practically all of Woodland Township's population increase (474 persons out of total of 618) was due to an increase in the institutional population. Likewise, the population of Washington Township increased by 66 residents, while the number of people in group quarters decreased by 166 residents, masking the "actual" increase in residents. Maurice River Township's increase of 1,048 residents can almost entirely be attributed to an increase in the institutional population (1,044), while Woodbine Borough experienced a decrease in institutional population (-75) that adds to an overall population decrease of 244 people. New Hanover Township has a similar decrease in both population (-2,359) and group quarters (-415).

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

Figure P1

Municipal Population Change - 2000 to 2010

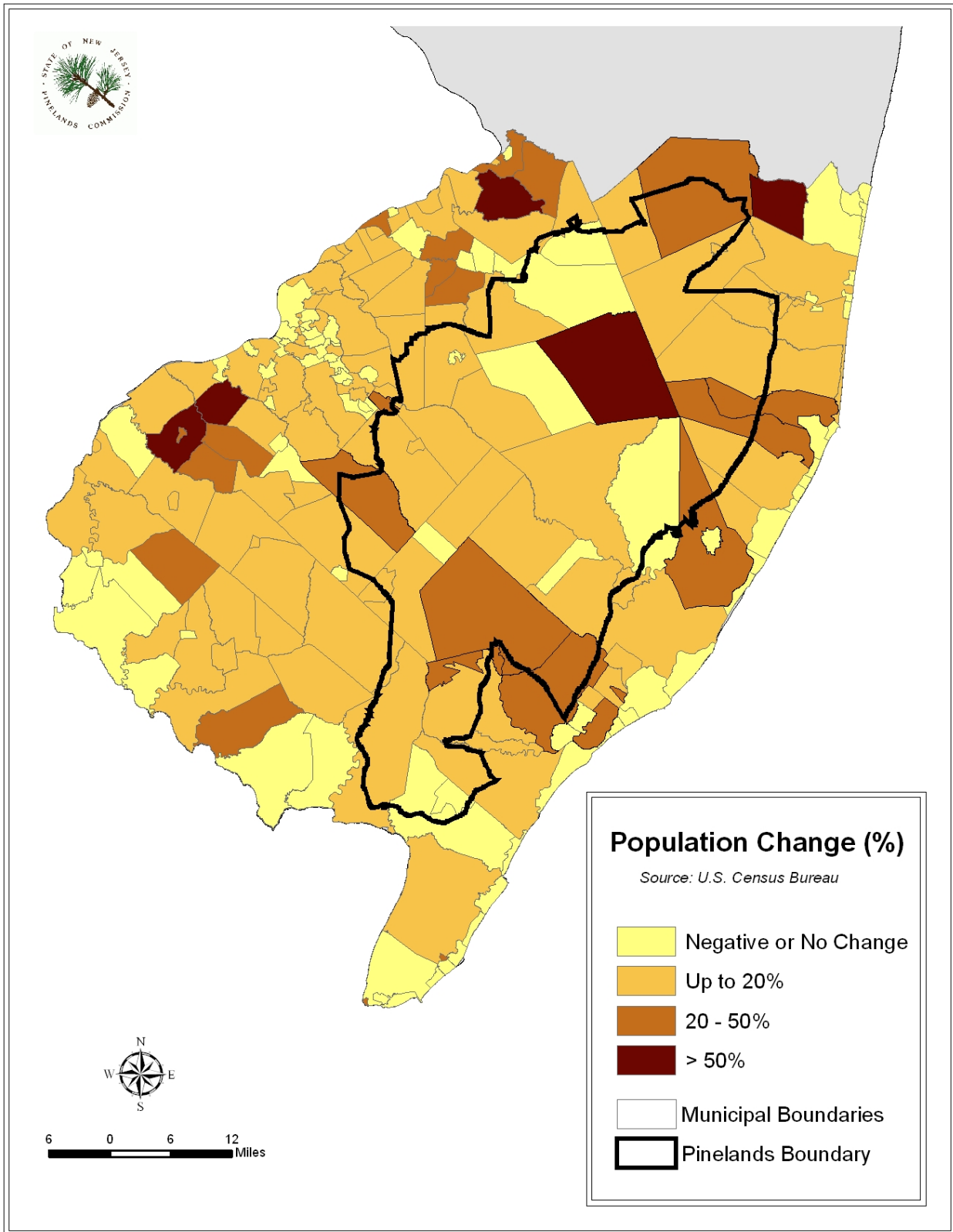


Table P1a

Population by Pinelands Municipality

(Sorted by Population Change from 2000 to 2010)

| Municipalities | County | 1980 | 1990 | 2000 | 2010 | Change 2000 - 2010 | Change 1980 - 2010 |
|---|------------|----------------|----------------|----------------|----------------|-----------------------|-----------------------|
| Woodland Township | Burlington | 2,285 | 2,063 | 1,170 | 1,788 | 52.8% | -21.8% |
| Egg Harbor Township | Atlantic | 19,381 | 24,544 | 30,726 | 43,323 | 41.0% | 123.5% |
| Barnegat Township | Ocean | 8,702 | 12,235 | 15,270 | 20,936 | 37.1% | 140.6% |
| Hamilton Township | Atlantic | 9,499 | 16,012 | 20,499 | 26,503 | 29.3% | 179.0% |
| Ocean Township | Ocean | 3,731 | 5,416 | 6,450 | 8,332 | 29.2% | 123.3% |
| Jackson Township | Ocean | 25,644 | 33,233 | 42,816 | 54,856 | 28.1% | 113.9% |
| Little Egg Harbor Township | Ocean | 8,483 | 13,333 | 15,945 | 20,065 | 25.8% | 136.5% |
| Monroe Township | Gloucester | 21,639 | 26,703 | 28,967 | 36,129 | 24.7% | 67.0% |
| Weymouth Township | Atlantic | 1,260 | 1,957 | 2,257 | 2,715 | 20.3% | 115.5% |
| Galloway Township | Atlantic | 12,176 | 23,330 | 31,209 | 37,349 | 19.7% | 206.7% |
| Buena Borough | Atlantic | 3,642 | 4,441 | 3,873 | 4,603 | 18.8% | 26.4% |
| Stafford Township | Ocean | 10,385 | 13,325 | 22,532 | 26,535 | 17.8% | 155.5% |
| Hammonton Town | Atlantic | 12,298 | 12,208 | 12,604 | 14,791 | 17.4% | 20.3% |
| Plumsted Township | Ocean | 4,674 | 6,005 | 7,275 | 8,421 | 15.8% | 80.2% |
| Maurice River Township | Cumberland | 4,577 | 6,648 | 6,928 | 7,976 | 15.1% | 74.3% |
| Winslow Township | Camden | 20,034 | 30,087 | 34,611 | 39,499 | 14.1% | 97.2% |
| Eagleswood Township | Ocean | 1,009 | 1,476 | 1,441 | 1,603 | 11.2% | 58.9% |
| Manchester Township | Ocean | 27,987 | 35,976 | 38,928 | 43,070 | 10.6% | 53.9% |
| Washington Township | Burlington | 808 | 805 | 621 | 687 | 10.6% | -15.0% |
| Estell Manor City | Atlantic | 848 | 1,404 | 1,585 | 1,735 | 9.5% | 104.6% |
| Lacey Township | Ocean | 14,161 | 22,141 | 25,346 | 27,644 | 9.1% | 95.2% |
| Franklin Township | Gloucester | 12,396 | 14,482 | 15,466 | 16,820 | 8.8% | 35.7% |
| Evesham Township | Burlington | 21,508 | 35,309 | 42,275 | 45,538 | 7.7% | 111.7% |
| Port Republic City | Atlantic | 837 | 992 | 1,037 | 1,115 | 7.5% | 33.2% |
| Chesilhurst Borough | Camden | 1,590 | 1,526 | 1,520 | 1,634 | 7.5% | 2.8% |
| Wrightstown Borough | Burlington | 3,031 | 3,843 | 748 | 802 | 7.2% | -73.5% |
| Beachwood Borough | Ocean | 7,687 | 9,324 | 10,375 | 11,045 | 6.5% | 43.7% |
| Lakehurst Borough | Ocean | 2,908 | 3,078 | 2,522 | 2,654 | 5.2% | -8.7% |
| Mullica Township | Atlantic | 5,243 | 5,896 | 5,912 | 6,147 | 4.0% | 17.2% |
| Medford Township | Burlington | 17,622 | 20,526 | 22,253 | 23,033 | 3.5% | 30.7% |
| Berkeley Township | Ocean | 23,151 | 37,319 | 39,991 | 41,255 | 3.2% | 78.2% |
| Upper Township | Cape May | 6,713 | 10,681 | 12,115 | 12,373 | 2.1% | 84.3% |
| Buena Vista Township | Atlantic | 6,959 | 7,655 | 7,436 | 7,570 | 1.8% | 8.8% |
| Waterford Township | Camden | 8,126 | 10,940 | 10,494 | 10,649 | 1.5% | 31.0% |
| South Toms River Borough | Ocean | 3,954 | 3,869 | 3,634 | 3,684 | 1.4% | -6.8% |
| Berlin Township | Camden | 5,348 | 5,466 | 5,290 | 5,357 | 1.3% | 0.2% |
| Southampton Township | Burlington | 8,808 | 10,202 | 10,388 | 10,464 | 0.7% | 18.8% |
| Shamong Township | Burlington | 4,537 | 5,765 | 6,462 | 6,490 | 0.4% | 43.0% |
| Dennis Township | Cape May | 3,989 | 5,574 | 6,492 | 6,467 | -0.4% | 62.1% |
| Medford Lakes Borough | Burlington | 4,958 | 4,462 | 4,173 | 4,146 | -0.6% | -16.4% |
| Pemberton Township | Burlington | 29,720 | 31,342 | 28,691 | 27,912 | -2.7% | -6.1% |
| Tabernacle Township | Burlington | 6,236 | 7,360 | 7,170 | 6,949 | -3.1% | 11.4% |
| Folsom Borough | Atlantic | 1,892 | 2,181 | 1,972 | 1,885 | -4.4% | -0.4% |
| Bass River Township | Burlington | 1,344 | 1,580 | 1,510 | 1,443 | -4.4% | 7.4% |
| Egg Harbor City | Atlantic | 4,618 | 4,583 | 4,545 | 4,243 | -6.6% | -8.1% |
| Woodbine Borough | Cape May | 2,809 | 2,678 | 2,716 | 2,472 | -9.0% | -12.0% |
| New Hanover Township | Burlington | 14,258 | 9,546 | 9,744 | 7,385 | -24.2% | -48.2% |
| Pinelands Total | | 423,465 | 549,521 | 615,984 | 698,092 | 13.3% | 64.9% |
| <i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | |
| Berlin Borough | Camden | 5,786 | 5,672 | 6,149 | 7,588 | 23.4% | 31.1% |
| Vineland City | Cumberland | 53,753 | 54,780 | 56,271 | 60,724 | 7.9% | 13.0% |
| Springfield Township | Burlington | 2,691 | 3,028 | 3,227 | 3,414 | 5.8% | 26.9% |
| Corbin City | Atlantic | 254 | 412 | 468 | 492 | 5.1% | 93.7% |
| North Hanover Township | Burlington | 9,050 | 9,994 | 7,347 | 7,678 | 4.5% | -15.2% |
| Toms River Township | Ocean | 64,455 | 76,371 | 89,706 | 91,239 | 1.7% | 41.6% |
| "Outside" Pinelands Total | | 135,989 | 150,257 | 163,168 | 171,135 | 4.9% | 25.8% |

Table P1b

2010 Census Group Quarters Population

(Sorted by Group Quarters Percentage)

| Municipality | County | 2010 Pop | Group Quarters | % Group Quarters | Inst Pop | % Inst | Non-Inst Pop | % Non-Inst |
|---|------------|----------------|----------------|------------------|---------------|-------------|--------------|-------------|
| New Hanover Township | Burlington | 7,385 | 5,685 | 77.0% | 5,325 | 72.1% | 360 | 4.9% |
| Maurice River Township | Cumberland | 7,976 | 4,405 | 55.2% | 4,405 | 55.2% | 0 | 0.0% |
| Woodland Township | Burlington | 1,788 | 474 | 26.5% | 54 | 3.0% | 420 | 23.5% |
| Woodbine Borough | Cape May | 2,472 | 496 | 20.1% | 9 | 0.4% | 487 | 19.7% |
| Galloway Township | Atlantic | 37,349 | 2,818 | 7.5% | 401 | 1.1% | 2,417 | 6.5% |
| Chesilhurst Borough | Camden | 1,634 | 108 | 6.6% | 49 | 3.0% | 59 | 3.6% |
| Hamilton Township | Atlantic | 26,503 | 1,120 | 4.2% | 982 | 3.7% | 138 | 0.5% |
| Winslow Township | Camden | 39,499 | 962 | 2.4% | 839 | 2.1% | 123 | 0.3% |
| Hammonton Town | Atlantic | 14,791 | 306 | 2.1% | 167 | 1.1% | 139 | 0.9% |
| Washington Township | Burlington | 687 | 14 | 2.0% | 14 | 2.0% | 0 | 0.0% |
| Dennis Township | Cape May | 6,467 | 120 | 1.9% | 103 | 1.6% | 17 | 0.3% |
| Manchester Township | Ocean | 43,070 | 775 | 1.8% | 674 | 1.6% | 101 | 0.2% |
| Pemberton Township | Burlington | 27,912 | 485 | 1.7% | 417 | 1.5% | 68 | 0.2% |
| Waterford Township | Camden | 10,649 | 170 | 1.6% | 4 | 0.0% | 166 | 1.6% |
| Mullica Township | Atlantic | 6,147 | 87 | 1.4% | 0 | 0.0% | 87 | 1.4% |
| Berkeley Township | Ocean | 41,255 | 582 | 1.4% | 568 | 1.4% | 14 | 0.0% |
| Little Egg Harbor Township | Ocean | 20,065 | 269 | 1.3% | 269 | 1.3% | 0 | 0.0% |
| Medford Township | Burlington | 23,033 | 220 | 1.0% | 177 | 0.8% | 43 | 0.2% |
| Evesham Township | Burlington | 45,538 | 376 | 0.8% | 136 | 0.3% | 240 | 0.5% |
| Jackson Township | Ocean | 54,856 | 432 | 0.8% | 420 | 0.8% | 12 | 0.0% |
| Egg Harbor City | Atlantic | 4,243 | 33 | 0.8% | 20 | 0.5% | 13 | 0.3% |
| Stafford Township | Ocean | 2,6535 | 180 | 0.7% | 176 | 0.7% | 4 | 0.0% |
| Port Republic City | Atlantic | 1,115 | 7 | 0.6% | 0 | 0.0% | 7 | 0.6% |
| Barnegat Township | Ocean | 20,936 | 118 | 0.6% | 109 | 0.5% | 9 | 0.0% |
| Monroe Township | Gloucester | 36,129 | 195 | 0.5% | 151 | 0.4% | 44 | 0.1% |
| Estell Manor City | Atlantic | 1,735 | 8 | 0.5% | 8 | 0.5% | 0 | 0.0% |
| Buena Borough | Atlantic | 4,603 | 19 | 0.4% | 0 | 0.0% | 19 | 0.4% |
| Franklin Township | Gloucester | 16,820 | 51 | 0.3% | 0 | 0.0% | 51 | 0.3% |
| Folsom Borough | Atlantic | 1,885 | 5 | 0.3% | 0 | 0.0% | 5 | 0.3% |
| Weymouth Township | Atlantic | 2,715 | 7 | 0.3% | 0 | 0.0% | 7 | 0.3% |
| Buena Vista Township | Atlantic | 7,570 | 18 | 0.2% | 0 | 0.0% | 18 | 0.2% |
| Berlin Township | Camden | 5,357 | 12 | 0.2% | 0 | 0.0% | 12 | 0.2% |
| Shamong Township | Burlington | 6,490 | 14 | 0.2% | 13 | 0.2% | 1 | 0.0% |
| Lacey Township | Ocean | 27,644 | 50 | 0.2% | 26 | 0.1% | 24 | 0.1% |
| Beachwood Borough | Ocean | 11,045 | 14 | 0.1% | 0 | 0.0% | 14 | 0.1% |
| Tabernacle Township | Burlington | 6,949 | 6 | 0.1% | 0 | 0.0% | 6 | 0.1% |
| Upper Township | Cape May | 12,373 | 10 | 0.1% | 0 | 0.0% | 10 | 0.1% |
| Plumsted Township | Ocean | 8,421 | 6 | 0.1% | 0 | 0.0% | 6 | 0.1% |
| Ocean Township | Ocean | 8,332 | 4 | 0.0% | 0 | 0.0% | 4 | 0.0% |
| Egg Harbor Township | Atlantic | 43,323 | 19 | 0.0% | 0 | 0.0% | 19 | 0.0% |
| Bass River Township | Burlington | 1,443 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% |
| Medford Lakes Borough | Burlington | 4,146 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% |
| Southampton Township | Burlington | 10,464 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% |
| Wrightstown Borough | Burlington | 802 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% |
| Eagleswood Township | Ocean | 1,603 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% |
| Lakehurst Borough | Ocean | 2,654 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% |
| South Toms River Borough | Ocean | 3,684 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% |
| Pinelands Total | | 698,092 | 20,680 | 3.0% | 15,516 | 2.2% | 5,164 | 0.7% |
| <i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | | |
| Vineland City | Cumberland | 60,724 | 1,491 | 2.5% | 897 | 1.5% | 594 | 1.0% |
| Berlin Borough | Camden | 7,588 | 139 | 1.8% | 126 | 1.7% | 13 | 0.2% |
| Toms River Township | Ocean | 91,239 | 1,439 | 1.6% | 1,343 | 1.5% | 96 | 0.1% |
| Springfield Township | Burlington | 3,414 | 6 | 0.2% | 0 | 0.0% | 6 | 0.2% |
| Corbin City | Atlantic | 492 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% |
| North Hanover Township | Burlington | 7,678 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% |
| "Outside" Pinelands Total | | 171,135 | 3,075 | 1.8% | 2,366 | 1.4% | 709 | 0.4% |

Table P1c Group Quarters Components of Population Change (2000 to 2010)

(Sorted by Group Quarters Change)

| Municipality | County | 2010 Pop | 2000 Pop | 2010 - 2000 Pop Change | GQ Change | Institutional Change | Non-Inst Change | Non-GQ Change |
|---|------------|----------|----------|------------------------|-----------|----------------------|-----------------|---------------|
| Maurice River Township | Cumberland | 7,976 | 6,928 | 1,048 | 1,044 | 1,044 | 0 | 4 |
| Galloway Township | Atlantic | 37,349 | 31,209 | 6,140 | 716 | 369 | 347 | 5,424 |
| Woodland Township | Burlington | 1,788 | 1,170 | 618 | 474 | 54 | 420 | 144 |
| Evesham Township | Burlington | 45,538 | 42,275 | 3,263 | 193 | 22 | 171 | 3,070 |
| Little Egg Harbor Township | Ocean | 20,065 | 15,945 | 4,120 | 99 | 99 | 0 | 4,021 |
| Hamilton Township | Atlantic | 26,503 | 20,499 | 6,004 | 81 | -44 | 125 | 5,923 |
| Jackson Township | Ocean | 54,856 | 42,816 | 12,040 | 52 | 55 | -3 | 11,988 |
| Manchester Township | Ocean | 43,070 | 38,928 | 4,142 | 47 | 169 | -122 | 4,095 |
| Mullica Township | Atlantic | 6,147 | 5,912 | 235 | 39 | 0 | 39 | 196 |
| Shamong Township | Burlington | 6,490 | 6,462 | 28 | 12 | 13 | -1 | 16 |
| Lacey Township | Ocean | 27,644 | 25,346 | 2,298 | 12 | 2 | 10 | 2,286 |
| Beachwood Borough | Ocean | 11,045 | 10,375 | 670 | 8 | 0 | 8 | 662 |
| Upper Township | Cape May | 12,373 | 12,115 | 258 | 2 | 0 | 2 | 256 |
| Port Republic City | Atlantic | 1,115 | 1,037 | 78 | 1 | 0 | 1 | 77 |
| Weymouth Township | Atlantic | 2,715 | 2,257 | 458 | 1 | 0 | 1 | 457 |
| Bass River Township | Burlington | 1,443 | 1,510 | -67 | 0 | 0 | 0 | -67 |
| Medford Lakes Borough | Burlington | 4,146 | 4,173 | -27 | 0 | 0 | 0 | -27 |
| Eagleswood Township | Ocean | 1,603 | 1,441 | 162 | 0 | 0 | 0 | 162 |
| Lakehurst Borough | Ocean | 2,654 | 2,522 | 132 | 0 | 0 | 0 | 132 |
| South Toms River Borough | Ocean | 3,684 | 3,634 | 50 | 0 | 0 | 0 | 50 |
| Folsom Borough | Atlantic | 1,885 | 1,972 | -87 | -2 | 0 | -2 | -85 |
| Plumsted Township | Ocean | 8,421 | 7,275 | 1,146 | -2 | 0 | -2 | 1,148 |
| Berkeley Township | Ocean | 41,255 | 39,991 | 1,264 | -6 | 349 | -355 | 1,270 |
| Berlin Township | Camden | 5,357 | 5,290 | 67 | -7 | 0 | -7 | 74 |
| Barnegat Township | Ocean | 20,936 | 15,270 | 5,666 | -9 | -14 | 5 | 5,675 |
| Wrightstown Borough | Burlington | 802 | 748 | 54 | -10 | 0 | -10 | 64 |
| Buena Borough | Atlantic | 4,603 | 3,873 | 730 | -14 | 0 | -14 | 744 |
| Monroe Township | Gloucester | 36,129 | 28,967 | 7,162 | -17 | 5 | -22 | 7,179 |
| Estell Manor City | Atlantic | 1,735 | 1,585 | 150 | -19 | -19 | 0 | 169 |
| Pemberton Township | Burlington | 27,912 | 28,691 | -779 | -24 | -16 | -8 | -755 |
| Egg Harbor Township | Atlantic | 43,323 | 30,726 | 12,597 | -28 | 0 | -28 | 12,625 |
| Chesilhurst Borough | Camden | 1,634 | 1,520 | 114 | -29 | -55 | 26 | 143 |
| Medford Township | Burlington | 23,033 | 22,253 | 780 | -30 | -13 | -17 | 810 |
| Egg Harbor City | Atlantic | 4,243 | 4,545 | -302 | -37 | -11 | -26 | -265 |
| Waterford Township | Camden | 10,649 | 10,494 | 155 | -39 | 4 | -43 | 194 |
| Franklin Township | Gloucester | 16,820 | 15,466 | 1,354 | -39 | 0 | -39 | 1,393 |
| Hammonton Town | Atlantic | 14,791 | 12,604 | 2,187 | -41 | -58 | 17 | 2,228 |
| Ocean Township | Ocean | 8,332 | 6,450 | 1,882 | -50 | 0 | -50 | 1,932 |
| Southampton Township | Burlington | 10,464 | 10,388 | 76 | -58 | -58 | 0 | 134 |
| Tabernacle Township | Burlington | 6,949 | 7,170 | -221 | -66 | -67 | 1 | -155 |
| Woodbine Borough | Cape May | 2,472 | 2,716 | -244 | -75 | -561 | 486 | -169 |
| Buena Vista Township | Atlantic | 7,570 | 7,436 | 134 | -76 | 0 | -76 | 210 |
| Dennis Township | Cape May | 6,467 | 6,492 | -25 | -88 | -50 | -38 | 63 |
| Stafford Township | Ocean | 26,535 | 22,532 | 4,003 | -113 | -47 | -66 | 4,116 |
| Winslow Township | Camden | 39,499 | 34,611 | 4,888 | -165 | -193 | 28 | 5,053 |
| Washington Township | Burlington | 687 | 621 | 66 | -166 | -122 | -44 | 232 |
| New Hanover Township | Burlington | 7,385 | 9,744 | -2,359 | -415 | 489 | -904 | -1,944 |
| <i>“Outside” Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | | |
| Berlin Borough | Camden | 7,588 | 6,149 | 1,439 | 67 | 93 | -26 | 1,372 |
| Corbin City | Atlantic | 492 | 468 | 24 | 0 | 0 | 0 | 24 |
| North Hanover Township | Burlington | 7,678 | 7,347 | 331 | 0 | 0 | 0 | 331 |
| Springfield Township | Burlington | 3,414 | 3,227 | 187 | -1 | 0 | -1 | 188 |
| Toms River Township | Ocean | 91,239 | 89,706 | 1,533 | -498 | -392 | -106 | 2,031 |
| Vineland City | Cumberland | 60,724 | 56,271 | 4,453 | -911 | -155 | -756 | 5,364 |

- Most of the population growth in the Pinelands municipalities between 1990 and 2010 occurred outside of the Pinelands Area boundary.

Pinelands Municipal Census Block Population

| | 1990 | 2000 | 2010 | Change 1999 – 2000 | Change 2000 – 2010 | Change 1990 – 2010 |
|--------------|---------|---------|---------|-----------------------|-----------------------|-----------------------|
| In Boundary | 262,507 | 276,889 | 312,840 | 5.5% | 13.0% | 19.2% |
| Out Boundary | 437,380 | 502,263 | 556,933 | 14.8% | 10.9% | 27.3% |

Municipal Population Change Categories

| | # Municipalities | % Total |
|----------------------------------|------------------|---------|
| Gained Inside and Gained Outside | 19 | 35.8% |
| Gained Inside and Lost Outside | 4 | 7.5% |
| Gained Inside, No Area Outside | 7 | 13.2% |
| No Change Inside, Gained Outside | 3 | 5.7% |
| Lost Inside, Gained Outside | 15 | 28.3% |
| Lost Inside, Lost Outside | 1 | 1.9% |
| Lost Inside, No Area Outside | 4 | 7.5% |

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

Unit of Analysis: Sub-municipal data is aggregated by counting the population of census blocks inside and outside the Pinelands Area boundary using a geographic information system. The actual population of the state-designated Pinelands Area is calculated, along with areas of Pinelands municipalities that are outside the boundary. Census blocks from 1990 were normalized to make them comparable to 2000 census blocks.

Summary of Previous Findings

While population in the Pinelands region overall has grown to 615,984, the population within the state-designated Pinelands boundary was less than half that number in 2000. Population data analyzed at the census block level revealed that 276,889 people lived in the Pinelands in 2000, a 5.5% increase over the 1990 population of 262,507. The number of persons living in southern New Jersey, but outside of Pinelands Area boundaries increased from 361,009 in 1990 to 412,557 in 2000; an increase of 14.3%.

The three municipalities with the largest populations inside the Pinelands Area boundary are Pemberton Township, Hamilton Township, and Medford Township. Of the 53 municipalities that have any amount of land inside the Pinelands boundary, the 10 most populous in 2000 account for 58% of the Pinelands' total population and the 20 most populous accounts for 85%. The municipalities in the top bracket each contain at least one of the Pinelands development areas: Regional Growth Areas, Pinelands Towns, and Pinelands Villages.

Conversely, the 10 least-populated municipalities in the Pinelands comprise less than 0.5% of the Pinelands' total population. However, five of these 10 are municipalities with less than 10% of their land in the Pinelands Area. Some municipalities considered to be within the Pinelands Area (i.e. at least 10% of their total land area is within the Pinelands Area boundary) have little to no population actually living within the formal boundaries. For example, 20% of Eagleswood Township is located within the Pinelands Area boundary, yet all of its residents are located outside the boundary. Beachwood Borough, another example, has 28% of its land area and four residents located inside the Pinelands. In most instances, these areas fall within Preservation or Forest management areas.

Between 1990 and 2000, the biggest change within the Pinelands boundary occurred in municipalities that have Regional Growth Areas. Stafford Township, Egg Harbor Township, and Hamilton Township were the top three municipalities in terms of absolute growth, while Berkeley Township was the fastest growing in terms of percent change. Wrightstown Borough, Pemberton Township, and North Hanover Township had the largest absolute decreases in population, due to military base reductions.

The 53 municipalities with some or all of their land inside the Pinelands Area were classified according to where their population gain occurred. Municipalities that gained population both inside and outside the boundary accounted for 30.8% of the total municipalities, the largest category by far. Municipalities completely located inside the Pinelands Area that experienced population gain made up the smallest percentage of the total, with 7.7%. Percentages in the other categories were relatively equal, with between seven and nine municipalities in each category.

Update

The 2010 census block data shows that the total population of the 53 municipalities with any amount of land in the Pinelands reached 869,773, with about 64% of those living outside the Pinelands boundary. Population data analyzed at the census block level revealed that 312,840 people lived in the state-designed Pinelands Area in 2010; a 13% increase over the 2000 population of 276,889. The number of persons living in Pinelands municipalities outside of the Pinelands Area boundary increased from 502,263 in 2000 to 556,933 in 2010; an increase of 10.9%.

Pemberton Township and Hamilton Township continue to be among the three most populated municipalities in the Pinelands. A noticeable change over the previous census is the movement of Egg Harbor Township from the fourth most populated in the Pinelands in 2000 to the first most populated, dropping Medford Township to the fourth position (Table P2b).

Of the 53 municipalities with land in the Pinelands Area, the 10 municipalities with the most population in the Pinelands boundary account for 61.5% of the Pinelands total population, while the 20 most populated municipalities account for 85.5% of the population, both slightly more than in 2000. 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 (Table P2b), 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 (117.2%). Wrightstown Borough, Beachwood Borough, and Berlin Borough had the largest percentage decreases in population, but New Hanover Township had the largest absolute decrease (-2,400), probably due to military base reductions.

The 53 municipalities with some or all of their land inside the Pinelands were classified according to where their population gain occurred. Municipalities that gained population both inside and outside the boundary accounted for 35.8% of the total municipalities, the largest category by far. The second highest category was those municipalities that lost population inside but gained outside (28.3% or 15 municipalities). Percentages in the other categories were relatively small and equal, with between five and seven municipalities in each category. Pemberton Township is the only municipality categorized as “lost both inside and outside”.

Table P2a 2010 Population Inside and Outside the Pinelands Boundary

(Sorted by the Total Population Located Inside the Pinelands Boundary)

| Municipality | County | % Land Area in Pinelands | Total Population Inside Pinelands | Total Population Outside Pinelands | % Population Inside Pinelands |
|---|------------|--------------------------|-----------------------------------|------------------------------------|-------------------------------|
| Egg Harbor Township | Atlantic | 38% | 27,556 | 15,754 | 63.6% |
| Pemberton Township | Burlington | 90% | 27,394 | 517 | 98.1% |
| Hamilton Township | Atlantic | 97% | 24,954 | 1,549 | 94.2% |
| Medford Township | Burlington | 75% | 18,883 | 4,172 | 81.9% |
| Monroe Township | Gloucester | 69% | 17,871 | 18,258 | 49.5% |
| Winslow Township | Camden | 81% | 17,813 | 21,686 | 45.1% |
| Stafford Township | Ocean | 39% | 15,857 | 10,857 | 59.4% |
| Galloway Township | Atlantic | 38% | 14,945 | 22,404 | 40.0% |
| Hammonton Town | Atlantic | 100% | 14,791 | 0 | 100.0% |
| Manchester Township | Ocean | 72% | 12,286 | 30,885 | 28.5% |
| Evesham Township | Burlington | 55% | 11,860 | 33,678 | 26.0% |
| Waterford Township | Camden | 100% | 10,649 | 0 | 100.0% |
| Southampton Township | Burlington | 73% | 7,270 | 3,169 | 69.6% |
| Barneget Township | Ocean | 56% | 7,008 | 13,727 | 33.8% |
| Tabernacle Township | Burlington | 100% | 6,971 | 0 | 100.0% |
| New Hanover Township | Burlington | 91% | 6,692 | 693 | 90.6% |
| Shamong Township | Burlington | 100% | 6,493 | 0 | 100.0% |
| Buena Vista Township | Atlantic | 90% | 6,316 | 1,254 | 83.4% |
| Mullica Township | Atlantic | 100% | 6,041 | 0 | 100.0% |
| Maurice River Township | Cumberland | 69% | 5,897 | 2,075 | 74.0% |
| Jackson Township | Ocean | 47% | 4,832 | 50,056 | 8.8% |
| Egg Harbor City | Atlantic | 100% | 4,243 | 0 | 100.0% |
| Medford Lakes Borough | Burlington | 100% | 4,124 | 0 | 100.0% |
| Franklin Township | Gloucester | 36% | 2,616 | 14,200 | 15.6% |
| South Toms River Borough | Ocean | 48% | 2,586 | 1,098 | 70.2% |
| Lakehurst Borough | Ocean | 87% | 2,535 | 119 | 95.5% |
| Woodbine Borough | Cape May | 95% | 2,465 | 7 | 99.7% |
| Berkeley Township | Ocean | 30% | 2,112 | 39,104 | 5.1% |
| Weymouth Township | Atlantic | 82% | 2,093 | 629 | 76.9% |
| Folsom Borough | Atlantic | 100% | 1,885 | 0 | 100.0% |
| Woodland Township | Burlington | 100% | 1,788 | 0 | 100.0% |
| Chesilhurst Borough | Camden | 100% | 1,634 | 0 | 100.0% |
| Estell Manor City | Atlantic | 72% | 1,622 | 109 | 93.7% |
| Dennis Township | Cape May | 38% | 1,570 | 4,895 | 24.3% |
| Upper Township | Cape May | 33% | 1,306 | 11,067 | 10.6% |
| Bass River Township | Burlington | 87% | 1,036 | 407 | 71.8% |
| Buena Borough | Atlantic | 47% | 1,030 | 3,573 | 22.4% |
| Washington Township | Burlington | 100% | 793 | 0 | 100.0% |
| Lacey Township | Ocean | 67% | 550 | 27,097 | 2.0% |
| Plumsted Township | Ocean | 53% | 451 | 7,970 | 5.4% |
| Berlin Township | Camden | 16% | 303 | 5,054 | 5.7% |
| Little Egg Harbor Township | Ocean | 23% | 203 | 19,807 | 1.0% |
| Ocean Township | Ocean | 41% | 140 | 8,214 | 1.7% |
| Port Republic City | Atlantic | 35% | 88 | 1,027 | 7.9% |
| Wrightstown Borough | Burlington | 73% | 81 | 726 | 10.0% |
| Beachwood Borough | Ocean | 28% | 2 | 11,013 | 0.0% |
| Eagleswood Township | Ocean | 20% | 0 | 1,662 | 0.0% |
| <i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | |
| North Hanover Township | Burlington | 4% | 2,973 | 4,694 | 38.8% |
| Vineland City | Cumberland | 7% | 156 | 60,568 | 0.3% |
| Berlin Borough | Camden | 10% | 76 | 7,512 | 1.0% |
| Corbin City | Atlantic | 1% | 0 | 487 | 0.0% |
| Springfield Township | Burlington | 2% | 0 | 3,376 | 0.0% |
| Toms River Township | Ocean | 0.04% | 0 | 91,784 | 0.0% |

Table P2b

Population Change Inside/Outside the Pinelands Boundary (2000 to 2010)

(Sorted by the Total Population Change Inside the Pinelands Boundary)

| Municipality | % Land Area in Pinelands | 2000 Population Inside | 2010 Population Inside | Total Change Inside | % Change Inside Pinelands | 2000 Population Outside | 2010 Population Outside | Total Change Outside | % Change Outside |
|---|--------------------------|------------------------|------------------------|---------------------|---------------------------|-------------------------|-------------------------|----------------------|------------------|
| Egg Harbor Township | 38% | 16,209 | 27,556 | 11,347 | 70.0% | 14,517 | 15,754 | 1,237 | 8.5% |
| Hamilton Township | 97% | 19,136 | 24,954 | 5,818 | 30.4% | 1,363 | 1,549 | 186 | 13.6% |
| Galloway Township | 38% | 10,658 | 14,945 | 4,287 | 40.2% | 20,551 | 22,404 | 1,853 | 9.0% |
| Barneget Township | 56% | 3,226 | 7,008 | 3,782 | 117.2% | 12,044 | 13,727 | 1,683 | 14.0% |
| Monroe Township | 69% | 14,406 | 17,871 | 3,465 | 24.1% | 14,561 | 18,258 | 3,697 | 25.4% |
| Stafford Township | 39% | 13,390 | 15,857 | 2,467 | 18.4% | 9,142 | 10,857 | 1,715 | 18.8% |
| Winslow Township | 81% | 15,599 | 17,813 | 2,214 | 14.2% | 19,012 | 21,686 | 2,674 | 14.1% |
| Hammonton Town | 100% | 12,604 | 14,791 | 2,187 | 17.4% | 0 | 0 | 0 | 0.0% |
| Maurice River Township | 69% | 4,819 | 5,897 | 1,078 | 22.4% | 2,109 | 2,075 | -34 | -1.6% |
| Jackson Township | 47% | 4,106 | 4,832 | 726 | 17.7% | 38,710 | 50,056 | 11,346 | 29.3% |
| Medford Township | 75% | 18,239 | 18,883 | 644 | 3.5% | 4,014 | 4,172 | 158 | 3.9% |
| Woodland Township | 100% | 1,170 | 1,788 | 618 | 52.8% | 0 | 0 | 0 | 0.0% |
| Weymouth Township | 82% | 1,668 | 2,093 | 425 | 25.5% | 600 | 629 | 29 | 4.8% |
| Evesham Township | 55% | 11,553 | 11,860 | 307 | 2.7% | 30,722 | 33,678 | 2,956 | 9.6% |
| Washington Township | 100% | 621 | 793 | 172 | 27.7% | 0 | 0 | 0 | 0.0% |
| Buena Borough | 47% | 865 | 1,030 | 165 | 19.1% | 3,008 | 3,573 | 565 | 18.8% |
| Waterford Township | 100% | 10,494 | 10,649 | 155 | 1.5% | 0 | 0 | 0 | 0.0% |
| Lakehurst Borough | 87% | 2,393 | 2,535 | 142 | 5.9% | 129 | 119 | -10 | -7.8% |
| Upper Township | 33% | 1,175 | 1,306 | 131 | 11.1% | 10,940 | 11,067 | 127 | 1.2% |
| Mullica Township | 100% | 5,912 | 6,041 | 129 | 2.2% | 0 | 0 | 0 | 0.0% |
| Estell Manor City | 72% | 1,502 | 1,622 | 120 | 8.0% | 72 | 109 | 37 | 51.4% |
| Chesilhurst Borough | 100% | 1,520 | 1,634 | 114 | 7.5% | 0 | 0 | 0 | 0.0% |
| Manchester Township | 72% | 12,185 | 12,286 | 101 | 0.8% | 26,743 | 30,885 | 4,142 | 15.5% |
| Little Egg Harbor Township | 23% | 107 | 203 | 96 | 89.7% | 15,838 | 19,807 | 3,969 | 25.1% |
| South Toms River Borough | 48% | 2,495 | 2,586 | 91 | 3.6% | 1,139 | 1,098 | -41 | -3.6% |
| Southampton Township | 73% | 7,193 | 7,270 | 77 | 1.1% | 3,195 | 3,169 | -26 | -0.8% |
| Buena Vista Township | 90% | 6,248 | 6,316 | 68 | 1.1% | 1,188 | 1,254 | 66 | 5.6% |
| Plumsted Township | 53% | 412 | 451 | 39 | 9.5% | 6,863 | 7,970 | 1,107 | 16.1% |
| Shamong Township | 100% | 6,462 | 6,493 | 31 | 0.5% | 0 | 0 | 0 | 0.0% |
| Lacey Township | 67% | 521 | 550 | 29 | 5.6% | 24,825 | 27,097 | 2,272 | 9.2% |
| Eagleswood Township | 20% | 0 | 0 | 0 | 0.0% | 1,441 | 1,662 | 221 | 15.3% |
| Beachwood Borough | 28% | 4 | 2 | -2 | -50.0% | 10,371 | 11,013 | 642 | 6.2% |
| Ocean Township | 41% | 145 | 140 | -5 | -3.4% | 6,305 | 8,214 | 1,909 | 30.3% |
| Port Republic City | 35% | 102 | 88 | -14 | -13.7% | 935 | 1,027 | 92 | 9.8% |
| Wrightstown Borough | 73% | 123 | 81 | -42 | -34.1% | 625 | 726 | 101 | 16.2% |
| Franklin Township | 36% | 2,664 | 2,616 | -48 | -1.8% | 12,802 | 14,200 | 1,398 | 10.9% |
| Medford Lakes Borough | 100% | 4,173 | 4,124 | -49 | -1.2% | 0 | 0 | 0 | 0.0% |
| Dennis Township | 38% | 1,623 | 1,570 | -53 | -3.3% | 4,869 | 4,895 | 26 | 0.5% |
| Folsom Borough | 100% | 1,972 | 1,885 | -87 | -4.4% | 0 | 0 | 0 | 0.0% |
| Berlin Township | 16% | 403 | 303 | -100 | -24.8% | 4,887 | 5,054 | 167 | 3.4% |
| Bass River Township | 87% | 1,234 | 1,036 | -198 | -16.0% | 276 | 407 | 131 | 47.5% |
| Tabernacle Township | 100% | 7,170 | 6,971 | -199 | -2.8% | 0 | 0 | 0 | 0.0% |
| Woodbine Borough | 95% | 2,716 | 2,465 | -251 | -9.2% | 0 | 7 | 7 | - |
| Egg Harbor City | 100% | 4,545 | 4,243 | -302 | -6.6% | 0 | 0 | 0 | 0.0% |
| Berkeley Township | 30% | 2,467 | 2,112 | -355 | -14.4% | 37,524 | 39,104 | 1,580 | 4.2% |
| Pemberton Township | 90% | 28,127 | 27,394 | -733 | -2.6% | 564 | 517 | -47 | -8.3% |
| New Hanover Township | 91% | 9,109 | 6,692 | -2,417 | -26.5% | 635 | 693 | 58 | 9.1% |
| <i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | | | |
| Springfield Township | 2% | 0 | 0 | 0 | 0.0% | 3,227 | 3,376 | 149 | 4.6% |
| Toms River Township | 0.04% | 0 | 0 | 0 | 0.0% | 89,706 | 91,784 | 2,078 | 2.3% |
| Corbin City | 1% | 7 | 0 | -7 | 0% | 461 | 487 | 26 | 5.6% |
| Vineland City | 7% | 186 | 156 | -30 | -16.1% | 56,085 | 60,568 | 4,483 | 8.0% |
| Berlin Borough | 10% | 141 | 76 | -65 | -46.1% | 6,008 | 7,512 | 1,504 | 25.0% |
| North Hanover Township | 4% | 3,090 | 2,973 | -117 | -3.8% | 4,257 | 4,694 | 437 | 10.3% |

- While all of New Jersey shows trends of an aging population, the percentage of people in the Pinelands over 65 is increasing faster than the Non-Pinelands and the State.
- The percentage of residents under the age of 18 in the Pinelands is also decreasing while the Non-Pinelands and State percentage appear to holding steady since the 1990 census.

Population Aged 18 and Under

| | 1980 | 1990 | 2000 | 2010 |
|----------------------|-------|-------|-------|-------|
| Pinelands | 29.1% | 24.7% | 24.4% | 21.9% |
| Non-Pinelands | 28.1% | 24.8% | 25.4% | 24.2% |
| New Jersey | 27.0% | 23.3% | 24.8% | 23.5% |

Population Aged 65 and Over

| | 1980 | 1990 | 2000 | 2010 |
|----------------------|-------|-------|-------|-------|
| Pinelands | 13.5% | 16.4% | 16.8% | 18.0% |
| Non-Pinelands | 12.5% | 14.2% | 14.6% | 14.4% |
| New Jersey | 11.7% | 13.4% | 13.2% | 13.5% |

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

Unit of Analysis: Demographic data are compiled at the municipal level and aggregated to allow for inside/outside the Pinelands, regional, and statewide analyses.

Summary of Previous Findings

Examination of demographic data indicated that the population throughout southern New Jersey is aging. The proportion of the population under 18 declined 3.3% outside of the Pinelands between 1980 and 1990, and declined 4.4% inside of the Pinelands during the same period. During the same decade, the proportion of the population over 65 increased 1.7% outside of the Pinelands and rose 2.9% inside of the Pinelands. Statewide trends were similar to those found in southern New Jersey. An examination of the geographic distribution of the 20 municipalities in the eight southern counties with the lowest and highest median ages in 1980 and 1990 found that both age extremes (youngest and oldest) are found at the edges of the region, predominantly outside of the Pinelands. The concentration of older populations along the southern and eastern borders may reflect the popularity of resort and beach communities among retirees, while the concentration of younger populations in the north and west most likely reflects the presence of large military installations, a college campus, and more urban areas in Camden County.

The average age in the Pinelands continued to increase gradually during the 1990s, while the proportion of the population under 18 and over 65 changed very little from 1990 to 2000. Census figures also provided evidence of an aging working population (18 to 65 years old) both inside and outside of the Pinelands. The majority of the Pinelands municipalities fell within the median age 30 to 34 in 1990; however, by 2000, the median age group transitioned to the 35 to 39 age group. Similarly, the median age group of many of the Non-Pinelands municipalities shifted to the 35 to 39 age group over the same period.

In 2000, the population within the Pinelands Area boundary was approximately 283,600.⁹ Of these residents, 24.7% were under 18 years of age and 13.6% are over 64 years of age. Compared to the Pinelands municipal aggregate, the number of younger residents is approximately the same, but the number of senior residents inside the Pinelands Area boundary is 3% lower. Similarly, the number of residents in a Pinelands municipality, but outside the boundary was 405,000 residents; 24.6% of which were under the age of 18 and 18.4% over the age of 64.

Of note, the Pinelands portion of Berkeley Township, Manchester Township, Southampton Township, and Barnegat Township stand out as areas that have a large percentage of senior residents (over 40%). These areas are home to several retirement communities.

⁹ This figure is based on block level data which is more precise than block group level data, but less information is available at the block level.

Update

Census block groups are small enough to distinguish population inside and outside the Pinelands Area boundary, thus overcoming the limitations of municipal level data. Data at the block group level was used to calculate age groups inside and outside the Pinelands Area boundary for the year 2010. Based on the block group data, the population of the Pinelands municipalities both inside and outside the boundary was approximately 869,300 (roughly 313,000 inside the Pinelands).¹⁰ Of these inside residents, 21.9% are under 18 years of age and 18% are over 64 years of age. The population of the portion of the Pinelands municipalities that lie outside the boundary was 557,000 residents. Of this number, 24.2% are under 18 and 14.4% are over 64. So, the number of juveniles in the Pinelands municipalities is somewhat higher outside the boundary, but there are a greater number of seniors in Pinelands municipalities who live inside the boundary compared to outside the boundary.

The Pinelands portion of Berkeley Township, Manchester Township, and Southampton Township stand out as areas that have a large percentage of senior residents (over 30 %; 12% above the average); Barnegat Township, Ocean Township and Weymouth Township come in at over 24%. These areas are home to several retirement communities (Table P3b). Conversely, eight Pinelands municipalities have fewer than 10% (8% below the average).

There are 11 Pinelands municipalities whose 18 years of age and under group make up at least 25% of their population. Conversely, eight municipalities have 18 and under age groups that make up less than 18% of their population, which is 3.9% lower than the average.

¹⁰ This figure differs from the block level count, which was approximately 869,800 (312,800 inside the Pinelands). Block level data is more precise than block group level data, but less information is available at the block level.

Table P3a

Median Age at the Municipal Level

| | | 1980 Median Age Classes | | | | | | | | |
|-----------------------------------|--|-------------------------|--------|--------|--------|--------|-------|-------|-------|---------|
| | | 18-22 | 23-29 | 30-34 | 35-39 | 40-49 | 50-59 | 60-64 | 65-69 | Total |
| # of Pinelands Municipalities | | 1 | 26 | 13 | 3 | 2 | 1 | 0 | 1 | 47 |
| % of Pinelands Municipalities | | 2.10% | 55.30% | 27.70% | 6.40% | 4.30% | 2.10% | 0.00% | 2.10% | 100.00% |
| # of Non-Pinelands Municipalities | | 0 | 32 | 78 | 20 | 17 | 7 | 0 | 0 | 154 |
| % of Non-Pinelands Municipalities | | 0.00% | 20.80% | 50.60% | 13.00% | 11.00% | 4.50% | 0.00% | 0.00% | 100.00% |

| | | 1990 Median Age Classes | | | | | | | | |
|-----------------------------------|--|-------------------------|--------|--------|--------|-------|-------|-------|-------|---------|
| | | 18-22 | 23-29 | 30-34 | 35-39 | 40-49 | 50-59 | 60-64 | 65-69 | Total |
| # of Pinelands Municipalities | | 0 | 6 | 27 | 11 | 1 | 0 | 0 | 2 | 47 |
| % of Pinelands Municipalities | | 0.00% | 12.80% | 57.40% | 23.40% | 2.10% | 0.00% | 0.00% | 4.30% | 100.00% |
| # of Non-Pinelands Municipalities | | 0 | 10 | 69 | 51 | 15 | 7 | 3 | 0 | 155 |
| % of Non-Pinelands Municipalities | | 0.00% | 6.50% | 44.50% | 32.90% | 9.70% | 4.50% | 1.90% | 0.00% | 100.00% |

| | | 2000 Median Age Classes | | | | | | | | |
|-----------------------------------|--|-------------------------|-------|--------|--------|--------|-------|-------|-------|---------|
| | | 18-22 | 23-29 | 30-34 | 35-39 | 40-49 | 50-59 | 60-64 | 65-69 | Total |
| # of Pinelands Municipalities | | 0 | 0 | 9 | 29 | 7 | 0 | 0 | 2 | 47 |
| % of Pinelands Municipalities | | 0.00% | 0.00% | 19.10% | 61.70% | 14.90% | 0.00% | 0.00% | 4.30% | 100.00% |
| # of Non-Pinelands Municipalities | | 0 | 4 | 19 | 78 | 40 | 13 | 1 | 0 | 155 |
| % of Non-Pinelands Municipalities | | 0.00% | 2.60% | 12.30% | 50.30% | 25.80% | 8.40% | 0.60% | 0.00% | 100.00% |

| | | 2010 Median Age Classes | | | | | | | | |
|-----------------------------------|--|-------------------------|-------|-------|--------|--------|-------|-------|-------|---------|
| | | 18-22 | 23-29 | 30-34 | 35-39 | 40-49 | 50-59 | 60-64 | 65-69 | Total |
| # of Pinelands Municipalities | | 0 | 1 | 2 | 13 | 28 | 1 | 1 | 1 | 47 |
| % of Pinelands Municipalities | | 0.00% | 2.10% | 4.30% | 27.70% | 59.60% | 2.10% | 2.10% | 2.10% | 100.00% |
| # of Non-Pinelands Municipalities | | 0 | 8 | 6 | 46 | 74 | 12 | 7 | 2 | 155 |
| % of Non-Pinelands Municipalities | | 0.00% | 5.20% | 3.90% | 29.70% | 47.70% | 7.70% | 4.50% | 1.30% | 100.00% |

Table P3b Municipal Age Demographics (Census Block Group Level)
(Sorted Alphabetically by County)

| Municipality | County | 2000 Population | 2000 % Pop < 18 | 2000 % Pop ≥ 65 | 2010 Population | 2010 % Pop < 18 | 2010 % Pop ≥ 65 |
|---|-------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Buena Borough | Atlantic County | 3,873 | 25.7% | 15.8% | 4,603 | 24.9% | 14.2% |
| Buena Vista Township | Atlantic County | 7,436 | 24.7% | 15.3% | 7,570 | 22.9% | 16.4% |
| Egg Harbor City | Atlantic County | 4,545 | 28.3% | 13.9% | 4,243 | 24.9% | 11.8% |
| Egg Harbor Township | Atlantic County | 30,726 | 27.9% | 9.2% | 43,323 | 26.2% | 10.8% |
| Estell Manor City | Atlantic County | 1,585 | 30.2% | 9.7% | 1,735 | 23.9% | 11.1% |
| Folsom Borough | Atlantic County | 1,972 | 24.9% | 9.8% | 1,885 | 22.1% | 11.1% |
| Galloway Township | Atlantic County | 31,209 | 25.8% | 9.1% | 37,349 | 21.3% | 13.7% |
| Hamilton Township | Atlantic County | 20,499 | 27.1% | 8.2% | 26,503 | 24.1% | 10.5% |
| Hammonton Town | Atlantic County | 12,604 | 22.8% | 18.0% | 14,791 | 23.4% | 16.0% |
| Mullica Township | Atlantic County | 5,912 | 27.0% | 10.7% | 6,147 | 23.1% | 13.3% |
| Port Republic City | Atlantic County | 1,037 | 24.0% | 12.0% | 1,115 | 22.2% | 12.6% |
| Weymouth Township | Atlantic County | 2,257 | 24.9% | 17.1% | 2,715 | 17.2% | 27.1% |
| Bass River Township | Burlington County | 1,510 | 26.8% | 10.7% | 1,443 | 20.2% | 13.0% |
| Evesham Township | Burlington County | 42,275 | 27.2% | 8.9% | 45,538 | 23.3% | 13.1% |
| Medford Lakes Borough | Burlington County | 4,173 | 25.6% | 12.4% | 4,146 | 26.3% | 14.7% |
| Medford Township | Burlington County | 22,253 | 26.8% | 10.7% | 23,033 | 26.1% | 13.9% |
| New Hanover Township | Burlington County | 9,744 | 14.5% | 1.3% | 7,385 | 7.9% | 3.7% |
| Pemberton Township | Burlington County | 28,691 | 27.6% | 9.7% | 27,912 | 24.6% | 11.7% |
| Shamong Township | Burlington County | 6,462 | 29.4% | 6.0% | 6,490 | 26.8% | 9.8% |
| Southampton Township | Burlington County | 10,388 | 17.8% | 31.7% | 10,464 | 15.6% | 32.0% |
| Tabernacle Township | Burlington County | 7,170 | 27.9% | 7.0% | 6,949 | 24.1% | 11.2% |
| Washington Township | Burlington County | 621 | 29.3% | 24.3% | 687 | 18.3% | 15.0% |
| Woodland Township | Burlington County | 1,170 | 25.8% | 7.7% | 1,788 | 20.2% | 10.5% |
| Wrightstown Borough | Burlington County | 748 | 29.7% | 8.6% | 802 | 26.9% | 7.9% |
| Berlin Township | Camden County | 5,290 | 25.8% | 12.5% | 5,357 | 22.3% | 14.1% |
| Chesilhurst Borough | Camden County | 1,520 | 22.9% | 15.1% | 1,634 | 17.8% | 19.7% |
| Waterford Township | Camden County | 10,494 | 25.7% | 8.1% | 10,649 | 22.9% | 9.9% |
| Winslow Township | Camden County | 34,611 | 28.8% | 8.5% | 39,499 | 25.7% | 10.6% |
| Dennis Township | Cape May County | 6,492 | 28.3% | 12.3% | 6,467 | 21.4% | 15.0% |
| Upper Township | Cape May County | 12,115 | 28.6% | 12.2% | 12,373 | 23.8% | 14.3% |
| Woodbine Borough | Cape May County | 2,716 | 26.6% | 10.4% | 2,472 | 20.6% | 13.2% |
| Maurice River Township | Cumberland County | 6,928 | 12.9% | 6.4% | 7,976 | 9.5% | 7.0% |
| Franklin Township | Gloucester County | 15,466 | 27.7% | 9.6% | 16,820 | 24.0% | 10.5% |
| Monroe Township | Gloucester County | 28,967 | 25.6% | 12.9% | 36,129 | 25.7% | 13.6% |
| Barnegat Township | Ocean County | 15,270 | 27.1% | 17.9% | 20,936 | 20.9% | 24.1% |
| Beachwood Borough | Ocean County | 10,375 | 28.5% | 8.6% | 11,045 | 25.5% | 9.0% |
| Berkeley Township | Ocean County | 39,991 | 11.4% | 52.0% | 41,255 | 11.9% | 43.4% |
| Eagleswood Township | Ocean County | 1,441 | 24.7% | 14.4% | 1,603 | 21.7% | 13.5% |
| Jackson Township | Ocean County | 42,816 | 29.7% | 9.4% | 54,856 | 24.7% | 14.8% |
| Lacey Township | Ocean County | 25,346 | 25.6% | 15.2% | 27,644 | 23.1% | 14.8% |
| Lakehurst Borough | Ocean County | 2,522 | 30.6% | 8.0% | 2,654 | 28.4% | 7.0% |
| Little Egg Harbor Township | Ocean County | 15,945 | 24.2% | 17.7% | 20,065 | 20.4% | 21.6% |
| Manchester Township | Ocean County | 38,928 | 10.7% | 54.5% | 43,070 | 10.3% | 50.2% |
| Ocean Township | Ocean County | 6,450 | 25.5% | 13.8% | 8,332 | 16.1% | 24.4% |
| Plumsted Township | Ocean County | 7,275 | 28.5% | 8.5% | 8,421 | 26.2% | 11.4% |
| South Toms River Borough | Ocean County | 3,634 | 32.1% | 9.0% | 3,684 | 28.1% | 8.8% |
| Stafford Township | Ocean County | 22,532 | 23.8% | 18.8% | 26,535 | 22.8% | 19.6% |
| <i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | |
| Corbin City | Atlantic County | 468 | 29.9% | 10.5% | 492 | 29.5% | 12.2% |
| North Hanover Township | Burlington County | 7,347 | 33.6% | 6.2% | 7,678 | 29.5% | 8.4% |
| Springfield Township | Burlington County | 3,227 | 25.8% | 10.7% | 3,414 | 29.5% | 13.3% |
| Berlin Borough | Camden County | 6,149 | 24.6% | 13.6% | 7,588 | 29.5% | 16.9% |
| Vineland City | Cumberland County | 56,271 | 25.7% | 14.2% | 60,724 | 29.5% | 13.9% |
| Toms River Township | Ocean County | 89,706 | 23.3% | 17.2% | 91,239 | 29.5% | 17.3% |

- Population growth has been very sluggish across all regions of New Jersey for the past few years. However, the population of communities in the Pinelands has increased at a faster rate of growth than the Non-Pinelands for the five-year period.

Population Estimate

| Region | 2007 Estimate | 2008 Estimate | 2009 Estimate | 2010 Actual | 2011 Estimate | 5 Year Change | 5 Year % Change |
|---------------------|------------------|------------------|------------------|----------------|------------------|------------------|--------------------|
| New Jersey | 8,636,043 | 8,663,398 | 8,707,739 | 8,791,894 | 8,821,155 | 185,112 | 2.1 |
| Southern New Jersey | 2,403,482 | 2,411,118 | 2,419,475 | 2,422,041 | 2,425,226 | 21,744 | 0.9 |
| Pinelands | 683,253 | 685,852 | 688,972 | 698,092 | 699,235 | 15,982 | 2.3 |
| Non-Pinelands | 1,720,229 | 1,725,266 | 1,730,503 | 1,723,949 | 1,725,991 | 5,762 | 0.3 |

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

Unit of Analysis: Population data are compiled at the municipal level and aggregated to allow for inside/outside the Pinelands, regional, and statewide analyses.

Summary of Previous Findings:

The population of New Jersey grew by 2.8% between 2000 and 2006, adding just over 234,000 residents. The Pinelands municipalities grew more quickly than the Non-Pinelands municipalities and the state during the same period, increasing by 9.9% (compared to 2.8% statewide growth and 5.4% growth in southern New Jersey). Components of population growth (natural increase and migration) cannot be calculated for the Pinelands and the Non-Pinelands as this information is not available below the county level.

Population growth statewide and in the Pinelands increased 0.5% from 2008 to 2009 while the Non-Pinelands and all of southern New Jersey only grew at a rate of 0.3%. Despite the apparent growth discrepancy between the Pinelands and the Non-Pinelands, much of the growth may have occurred just outside of the Pinelands Area boundary thereby continuing a trend of faster growth outside the Pinelands than inside.

Update:

Population growth in New Jersey is estimated to have grown 0.3% statewide from 2010 to 2011. Estimated growth in the Pinelands communities, and all of southern New Jersey happened at a slower rate than the state (the Pinelands at 0.2%, the Non-Pinelands at 0.1%, and southern New Jersey at 0.1%). The 11 municipalities with their land area entirely within the Pinelands Area boundary showed a 1.7% increase in population in 2010 and only a 0.06% in 2011. Those communities that straddle the Pinelands Area boundary showed an increase in growth of 1.3% in 2010 and of 0.2% in 2011.

Of the 47 municipalities with at least 10% land area in the Pinelands Area, Egg Harbor Township and Monroe Township are the only municipalities to post 5-year (2007 to 2011) absolute population growth in the top 10% and 5-year percentage population growth in the top 10% of other Pinelands municipalities. (Table P4).

During the period of 2007 to 2011, only six municipalities have exceeded 10% estimated growth: Buena Borough, Weymouth Township, Woodland Township, Dennis Township, Upper Township, and Monroe Township. Thirteen Pinelands municipalities saw estimated growth of up to 5% and six municipalities are estimated to have grown up to 9.8%. Conversely, 20 of the

Pinelands municipalities showed slight estimated decreases of less than 10% during the five-year period and two municipalities actually exceeded an estimated 10% decrease (Chesilhurst Borough at -13.5% and New Hanover Township at -22.1%).

Figure P4

Population Change - 2010 to 2011

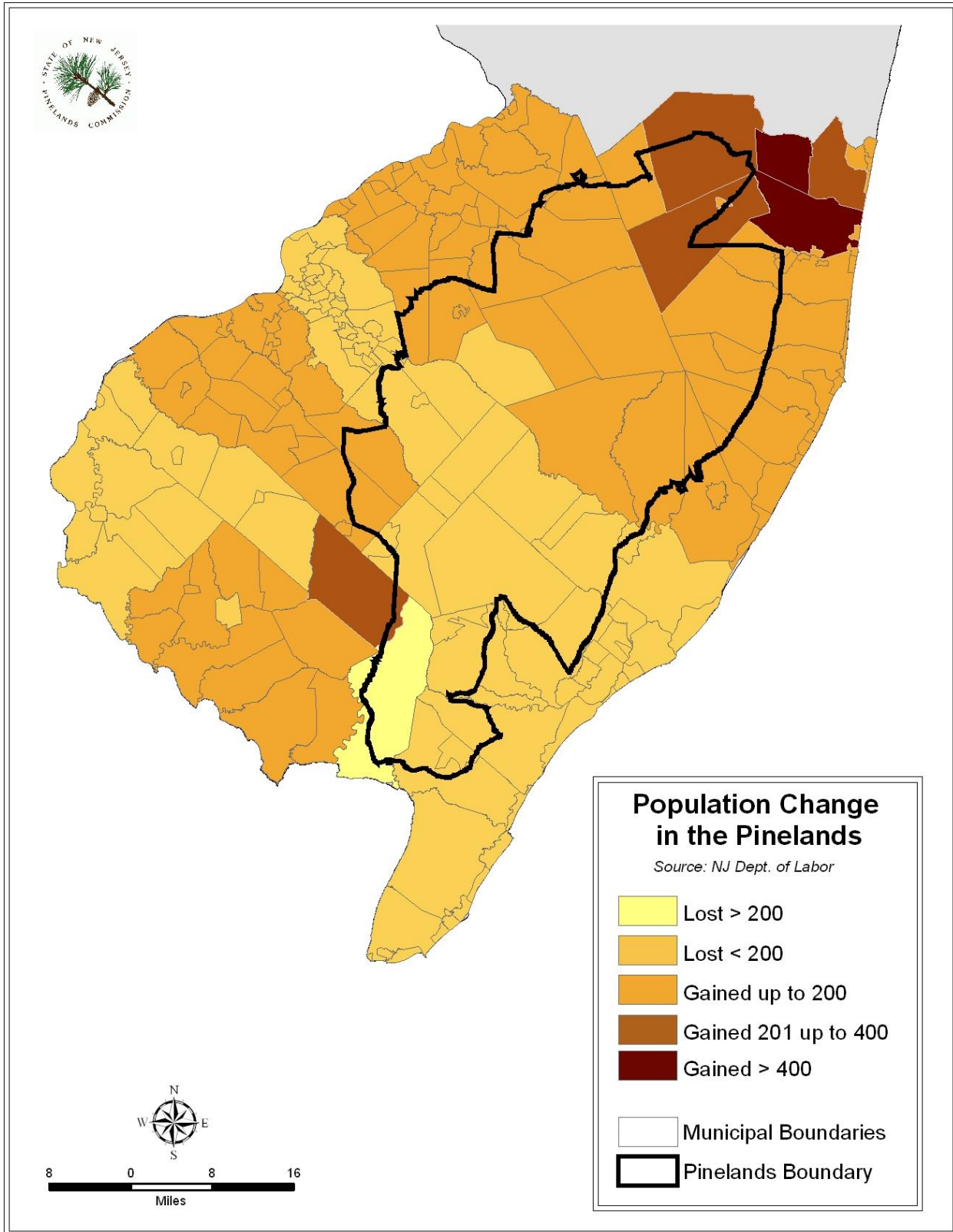


Table P4

Population Estimates

(Sorted by the 5 Year Population Change and, by proxy, the 5 Year Population Rank in Southern New Jersey)

| Municipality | County | 2007 Pop Estimate | 2008 Pop Estimate | 2009 Pop Estimate | 2010 Pop Actual | 2011 Pop Estimate | 5 Year Pop Change* | South N.J. 5 Year Rank: Change | 5 Year Pop Change (%) | South N.J. 5 Year Rank: % Change |
|---|------------|-------------------|-------------------|-------------------|-----------------|-------------------|--------------------|--------------------------------|-----------------------|----------------------------------|
| Egg Harbor Township | Atlantic | 39,431 | 39,900 | 40,239 | 43,323 | 43,288 | 3857 | 2 | 9.8% | 23 |
| Monroe Township | Gloucester | 32,707 | 33,057 | 33,276 | 36,129 | 36,232 | 3525 | 3 | 10.8% | 17 |
| Jackson Township | Ocean | 52,629 | 52,707 | 53,191 | 54,856 | 55,129 | 2500 | 6 | 4.8% | 42 |
| Hamilton Township | Atlantic | 24,446 | 24,340 | 24,326 | 26,503 | 26,483 | 2037 | 10 | 8.3% | 28 |
| Manchester Township | Ocean | 41,757 | 41,764 | 41,848 | 43,070 | 43,278 | 1521 | 11 | 3.6% | 50 |
| Lacey Township | Ocean | 26,319 | 26,402 | 26,566 | 27,644 | 27,781 | 1462 | 13 | 5.6% | 38 |
| Galloway Township | Atlantic | 35,958 | 36,378 | 36,578 | 37,349 | 37,322 | 1364 | 14 | 3.8% | 49 |
| Hammonton Town | Atlantic | 13,463 | 13,420 | 13,433 | 14,791 | 14,779 | 1316 | 16 | 9.8% | 24 |
| Upper Township | Cape May | 11,164 | 11,089 | 11,029 | 12,373 | 12,286 | 1122 | 21 | 10.1% | 20 |
| Buena Borough | Atlantic | 3,741 | 3,714 | 3,724 | 4,603 | 4,600 | 859 | 22 | 23.0% | 7 |
| Dennis Township | Cape May | 5,805 | 5,784 | 5,768 | 6,467 | 6,422 | 617 | 30 | 10.6% | 18 |
| Weymouth Township | Atlantic | 2,263 | 2,253 | 2,254 | 2,715 | 2,712 | 449 | 34 | 19.8% | 8 |
| Woodland Township | Burlington | 1,343 | 1,353 | 1,351 | 1,788 | 1,790 | 447 | 35 | 33.3% | 3 |
| Stafford Township | Ocean | 26,260 | 26,491 | 26,818 | 26,535 | 26,665 | 405 | 38 | 1.5% | 71 |
| Beachwood Borough | Ocean | 10,790 | 10,845 | 10,881 | 11,045 | 11,099 | 309 | 44 | 2.9% | 56 |
| Winslow Township | Camden | 39,169 | 39,364 | 39,599 | 39,499 | 39,466 | 297 | 47 | 0.8% | 78 |
| Medford Township | Burlington | 22,788 | 22,794 | 22,727 | 23,033 | 23,077 | 289 | 50 | 1.3% | 74 |
| Plumsted Township | Ocean | 8,194 | 8,242 | 8,292 | 8,421 | 8,463 | 269 | 51 | 3.3% | 55 |
| Buena Vista Township | Atlantic | 7,372 | 7,358 | 7,360 | 7,570 | 7,564 | 192 | 57 | 2.6% | 60 |
| Mullica Township | Atlantic | 6,028 | 6,028 | 6,052 | 6,147 | 6,144 | 116 | 63 | 1.9% | 64 |
| Evesham Township | Burlington | 45,523 | 45,275 | 45,370 | 45,538 | 45,624 | 101 | 68 | 0.2% | 85 |
| Wrightstown Borough | Burlington | 732 | 737 | 736 | 802 | 804 | 72 | 73 | 9.8% | 21 |
| Washington Township | Burlington | 643 | 646 | 649 | 687 | 689 | 46 | 78 | 7.2% | 32 |
| Medford Lakes Borough | Burlington | 4,109 | 4,119 | 4,110 | 4,146 | 4,153 | 44 | 79 | 1.1% | 75 |
| Estell Manor City | Atlantic | 1,708 | 1,714 | 1,724 | 1,735 | 1,734 | 26 | 83 | 1.5% | 72 |
| Waterford Township | Camden | 10,649 | 10,660 | 10,687 | 10,649 | 10,641 | -8 | 92 | -0.1% | 92 |
| South Toms River Borough | Ocean | 3,715 | 3,714 | 3,726 | 3,684 | 3,701 | -14 | 98 | -0.4% | 98 |
| Folsom Borough | Atlantic | 1,913 | 1,907 | 1,908 | 1,885 | 1,884 | -29 | 105 | -1.5% | 110 |
| Berlin Township | Camden | 5,387 | 5,415 | 5,457 | 5,357 | 5,353 | -34 | 106 | -0.6% | 102 |
| Eagleswood Township | Ocean | 1,648 | 1,679 | 1,703 | 1,603 | 1,610 | -38 | 108 | -2.3% | 123 |
| Woodbine Borough | Cape May | 2,503 | 2,494 | 2,500 | 2,472 | 2,459 | -44 | 110 | -1.8% | 115 |
| Lakehurst Borough | Ocean | 2,715 | 2,717 | 2,719 | 2,654 | 2,668 | -47 | 111 | -1.7% | 114 |
| Port Republic City | Atlantic | 1,216 | 1,213 | 1,216 | 1,115 | 1,113 | -103 | 126 | -8.5% | 166 |
| Bass River Township | Burlington | 1,551 | 1,547 | 1,541 | 1,443 | 1,447 | -104 | 127 | -6.7% | 160 |
| Egg Harbor City | Atlantic | 4,390 | 4,381 | 4,378 | 4,243 | 4,240 | -150 | 137 | -3.4% | 132 |
| Tabernacle Township | Burlington | 7,182 | 7,168 | 7,170 | 6,949 | 6,992 | -190 | 146 | -2.6% | 128 |
| Pemberton Township | Burlington | 28,182 | 28,047 | 27,986 | 27,912 | 27,966 | -216 | 153 | -0.8% | 104 |
| Ocean Township | Ocean | 8,615 | 8,964 | 9,121 | 8,332 | 8,372 | -243 | 154 | -2.8% | 130 |
| Chesilhurst Borough | Camden | 1,892 | 1,917 | 1,936 | 1,634 | 1,633 | -259 | 156 | -13.7% | 180 |
| Shamong Township | Burlington | 6,750 | 6,736 | 6,723 | 6,490 | 6,473 | -277 | 158 | -4.1% | 143 |
| Franklin Township | Gloucester | 17,174 | 17,320 | 17,368 | 16,820 | 16,869 | -305 | 162 | -1.8% | 116 |
| Little Egg Harbor Township | Ocean | 20,479 | 20,677 | 20,824 | 20,065 | 20,162 | -317 | 163 | -1.5% | 111 |
| Maurice River Township | Cumberland | 8,060 | 8,176 | 8,196 | 7,976 | 7,696 | -364 | 169 | -4.5% | 147 |
| Southampton Township | Burlington | 10,890 | 10,867 | 10,865 | 10,464 | 10,484 | -406 | 170 | -3.7% | 137 |
| Barneget Township | Ocean | 21,854 | 22,262 | 22,643 | 20,936 | 21,037 | -817 | 184 | -3.7% | 138 |
| Berkeley Township | Ocean | 42,656 | 42,783 | 42,975 | 41,255 | 41,455 | -1201 | 190 | -2.8% | 129 |
| New Hanover Township | Burlington | 9,490 | 9,434 | 9,429 | 7,385 | 7,396 | -2094 | 195 | -22.1% | 190 |
| <i>Outside Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | | | | |
| Vineland City | Cumberland | 58,475 | 58,800 | 59,198 | 60,724 | 60,952 | 2477 | 7 | 4.2% | 45 |
| North Hanover Township | Burlington | 7,401 | 7,371 | 7,368 | 7,678 | 7,692 | 291 | 49 | 3.9% | 48 |
| Corbin City | Atlantic | 518 | 520 | 531 | 492 | 491 | -27 | 103 | -5.2% | 152 |
| Springfield Township | Burlington | 3,487 | 3,466 | 3,454 | 3,414 | 3,420 | -67 | 117 | -1.9% | 119 |
| Berlin Borough | Camden | 7,922 | 7,926 | 7,943 | 7,588 | 7,583 | -339 | 166 | -4.3% | 144 |
| Toms River Township | Ocean | 95,202 | 96,066 | 96,945 | 91,239 | 91,680 | -3522 | 201 | -3.7% | 135 |

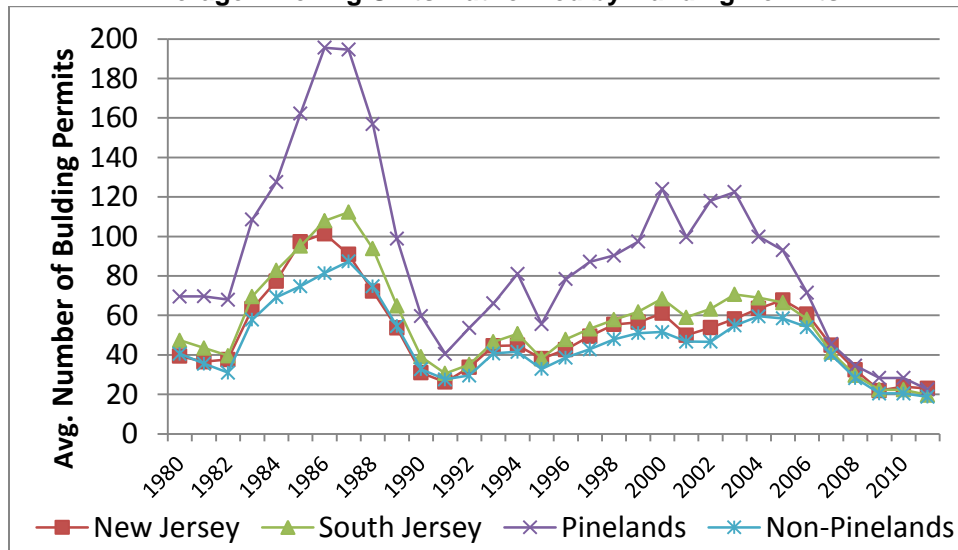
Building Permits for Dwelling Units

New Jersey Department of Labor 1980 - 2011

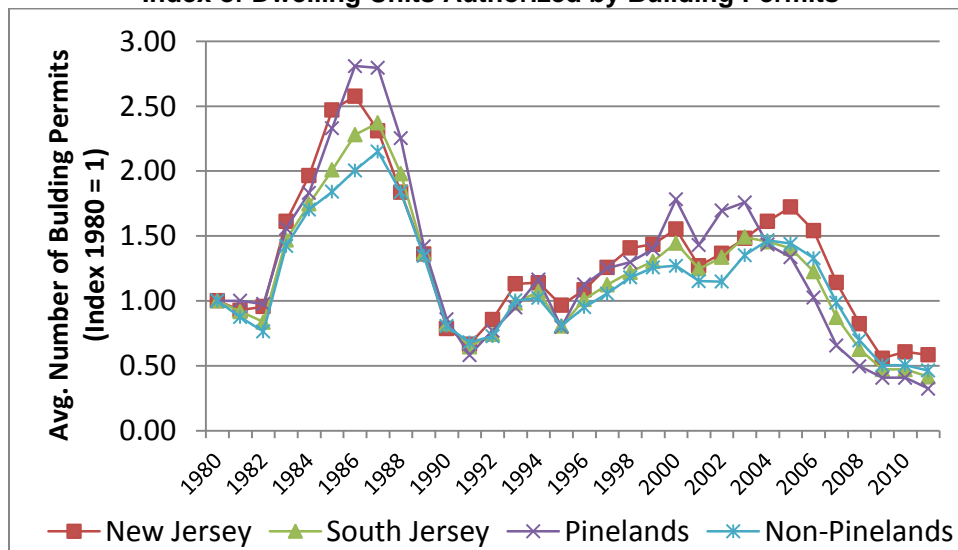
X Updated

- The average number of building permits in the Pinelands has steadily declined each year since 2004, although the rate of decline is lessening. Activity in the Pinelands has fallen sharply in the past five years by 51%, with a similar statewide decrease of 49%.

Average Dwelling Units Authorized by Building Permits



Index of Dwelling Units Authorized by Building Permits



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

Unit of Analysis: Municipal level data are aggregated to allow for inside/outside the Pinelands, regional, and statewide analyses. The aggregation method calculates the average units authorized per municipality.

Summary of Previous Findings

The overall trend in permits for dwelling units followed the broad cycle of economic activity, from a building boom in the mid-1980s to recession at the turn of the decade and subsequent recovery. The average number of permits issued by the Pinelands municipalities was consistently higher and experienced somewhat higher volatility than other areas throughout the monitoring period. This finding is not surprising because the Pinelands region is less developed than the other regions and therefore has more vacant land able to be developed. Another factor involved is the residential build-up that followed the beginning of casino gambling in Atlantic City in the early 1980s.

Building permit activity has gradually increased in all regions of the state from 1995 to 2003, except for a dip in activity during 2001 due to the onset of economic recession. The Pinelands municipalities that ranked highest in building permits during the 1990s tended to be suburban municipalities in the northern and/or eastern regions of the Pinelands. However, much of this building activity actually occurred outside the Pinelands Area boundary, with a few exceptions. An analysis conducted in 2001 suggested that as little as 18% of all the Pinelands municipalities' building permits were actually directed within the Pinelands Area boundary. The Pinelands average is traditionally high because it is influenced by a few towns that are experiencing rapid growth – some in regional growth areas inside the Pinelands Area boundary, others in areas outside the Pinelands Area boundary. The Non-Pinelands average is affected by a larger number of municipalities that are smaller in land area and/or have little or no remaining developable land. These municipalities drive the Non-Pinelands' average downward.

A dramatic shift in building permit activity in the Pinelands began in 2004 and continued through 2011. During those years, the average number of permits issued in the Pinelands decreased from 122 to 23; a decline of 81%. Similarly, the state as a whole saw permit activity fall by 60% (from 58 to 23 permits), and the Non-Pinelands municipalities experienced a 65% decrease in permits (from 55 to 19 permits). In fact, the 2004 to 2011 period marked the first time since 1987 to 1988 that building permit activity decreased in the Pinelands in consecutive years.

Update:

The downward shift in building permit activity in the Pinelands that started in 2004 and continued through 2011 marked the eighth consecutive year since 2003 that permits have declined in the Pinelands. The average number of permits (by municipality) issued from 2009 to 2011 in the Pinelands decreased from 28 to 23, a decline of 20.6%. This is about the same as 2009's decline, when buildings permits dropped by 18% in the Pinelands. Northern New Jersey saw an increase of 14.2% (three more permits issued from 2009). The state as a whole also saw a slight increase in permit activity of 4.7% for the two years (from 22 to 24 in 2010 and 23 in 2011). The Non-Pinelands municipalities' permits dropped only 8.3% (one less permit issued). The gap between the Pinelands and the Non-Pinelands municipalities' average number of permits remains the smallest it has been through the entire monitoring period.

Between 2003 (the most recent high point for permits issued in the Pinelands) and 2011, building activity has fallen by 81.6% in the Pinelands (versus -60.6% statewide and -65.8% in the Non-Pinelands). The only other comparable period of slowdown in the Pinelands during the monitoring period covered in this report was from 1986 to 1991. During those years, building permits decreased by 79% in the Pinelands from a high of 196 in 1986 to a low of 41 in 1991. A plausible explanation for the differences in scale of permit activity region-wide is that the Pinelands region has consistently shown more building permit activity over recent years than the Non-Pinelands. One would thus expect that a slowdown in the housing market is likely to have a greater effect on those municipalities that are experiencing more building activity.

The drop in permits in individual municipalities in the Pinelands was not as uniform as in 2009. Table R1 illustrates the uneven ups and downs in the region overall: only 12 of the 47 Pinelands municipalities that have greater than 10% of their total land area in the Pinelands boundary issued more permits in 2011 than in 2010, but 22 of the 47 issued more permits in 2010 than 2009. The net result was that 18 issued more permits in 2011 than in 2009, perhaps a sign that the recession is coming to an end or, conversely, perhaps a sign of volatility in the markets. Looking at the full 53 municipalities (all municipalities that have any amount of land in the Pinelands boundary), four municipalities showed an increase of more than 20 units during the two-year period (Stafford Township, Medford Township, Toms River Township, and Little Egg Harbor Township); while nine municipalities showed decreases of 18 or more units (Vineland City, Ocean Township, Jackson Township, Egg Harbor Township, Hamilton Township, Evesham Township, Winslow Township, Monroe Township, and Barnegat Township). Monroe Township and Toms River Township saw major increases in building permits issued in 2010, but then plummeted the next year (208 permits issued in 2010 to 63 in 2011 and 368 permits issued in 2010 to 103 in 2011, respectively). Thirty-seven municipalities experienced changes of less than 10 units.

Figure R1a

Residential Building Permits Issued – 2010

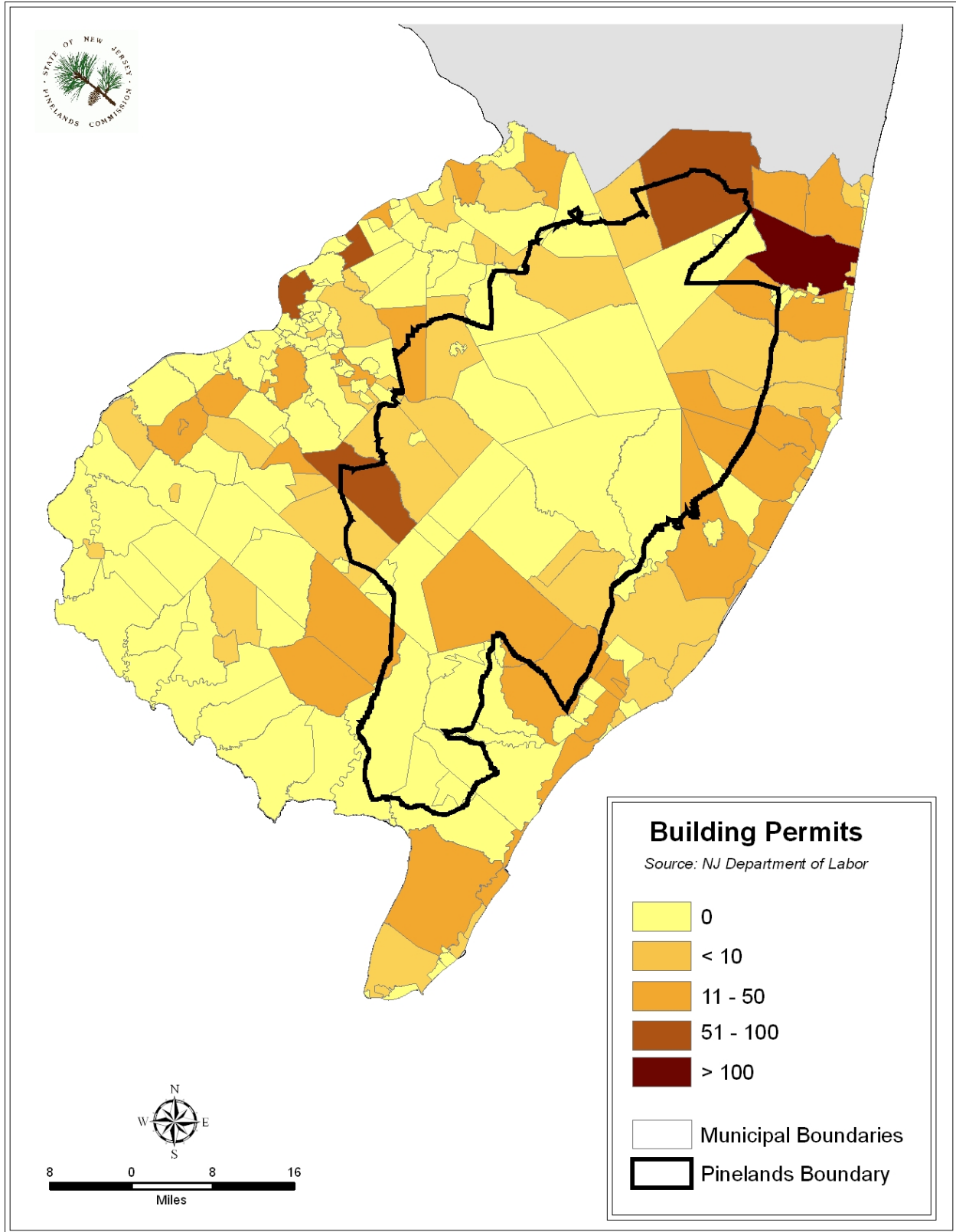


Figure R1b

Residential Building Permits Issued – 2011

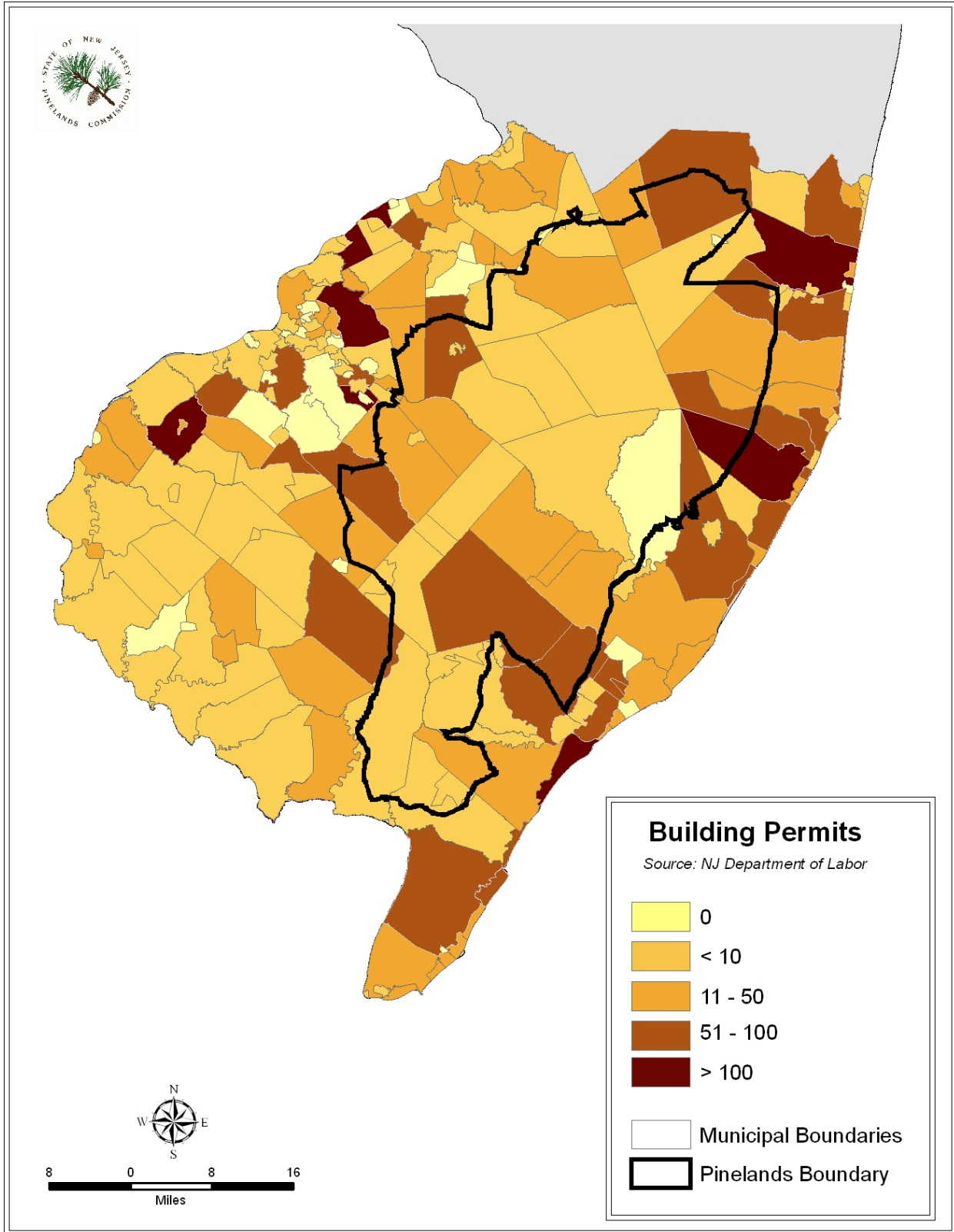


Table R1

Residential Building Permits¹¹

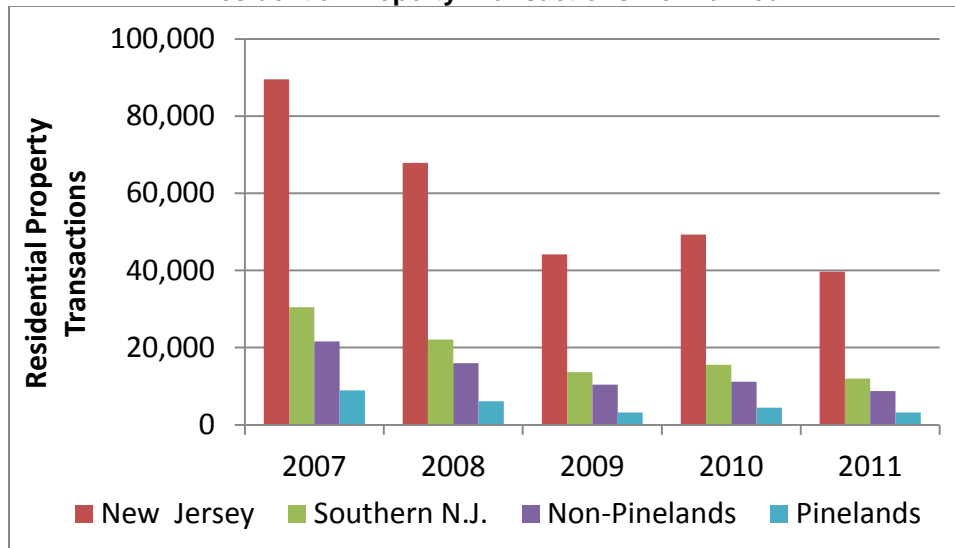
(Sorted by 5 Year Changes in Building Permits Issued)

| Municipality | County | Permits Issued | | | | | 5 Year Total | 5 Year Average | 5 year Change | 5 Year % Change |
|---|------------|----------------|------|------|------|-------------|--------------|----------------|---------------|-----------------|
| | | 2007 | 2008 | 2009 | 2010 | 2011 Prelim | | | | |
| Jackson Township | Ocean | 37 | 141 | 110 | 155 | 89 | 532 | 106.4 | 52 | 140.5% |
| Stafford Township | Ocean | 141 | 192 | 53 | 58 | 168 | 612 | 122.4 | 27 | 19.1% |
| Evesham Township | Burlington | 26 | 95 | 131 | 55 | 37 | 344 | 68.8 | 11 | 42.3% |
| Lacey Township | Ocean | 39 | 47 | 37 | 27 | 45 | 195 | 39 | 6 | 15.4% |
| Egg Harbor City | Atlantic | 12 | 8 | 9 | 15 | 14 | 58 | 11.6 | 2 | 16.7% |
| Buena Borough | Atlantic | 1 | 8 | 1 | 4 | 2 | 16 | 3.2 | 1 | 100.0% |
| Manchester Township | Ocean | 2 | 4 | 1 | 3 | 1 | 11 | 2.2 | -1 | -50.0% |
| South Toms River Borough | Ocean | 2 | 0 | 0 | 1 | 1 | 4 | 0.8 | -1 | -50.0% |
| Washington Township | Burlington | 3 | 2 | 1 | 3 | 2 | 11 | 2.2 | -1 | -33.3% |
| Folsom Borough | Atlantic | 3 | 2 | 0 | 1 | 1 | 7 | 1.4 | -2 | -66.7% |
| Lakehurst Borough | Ocean | 2 | 0 | 0 | 2 | 0 | 4 | 0.8 | -2 | -100.0% |
| Port Republic City | Atlantic | 3 | 2 | 0 | 0 | 1 | 6 | 1.2 | -2 | -66.7% |
| Upper Township | Cape May | 14 | 14 | 10 | 13 | 12 | 63 | 12.6 | -2 | -14.3% |
| Waterford Township | Camden | 24 | 17 | 13 | 16 | 22 | 92 | 18.4 | -2 | -8.3% |
| Weymouth Township | Atlantic | 3 | 3 | 2 | 1 | 1 | 10 | 2 | -2 | -66.7% |
| Woodland Township | Burlington | 5 | 5 | 3 | 5 | 3 | 21 | 4.2 | -2 | -40.0% |
| Dennis Township | Cape May | 13 | 9 | 8 | 8 | 10 | 48 | 9.6 | -3 | -23.1% |
| New Hanover Township | Burlington | 5 | 3 | 4 | 4 | 2 | 18 | 3.6 | -3 | -60.0% |
| Bass River Township | Burlington | 4 | 0 | 2 | 0 | 0 | 6 | 1.2 | -4 | -100.0% |
| Maurice River Township | Cumberland | 11 | 9 | 7 | 11 | 7 | 45 | 9 | -4 | -36.4% |
| Shamong Township | Burlington | 13 | 9 | 7 | 9 | 9 | 47 | 9.4 | -4 | -30.8% |
| Estell Manor City | Atlantic | 7 | 5 | 6 | 3 | 2 | 23 | 4.6 | -5 | -71.4% |
| Wrightstown Borough | Burlington | 5 | 1 | 0 | 0 | 0 | 6 | 1.2 | -5 | -100.0% |
| Berlin Township | Camden | 23 | 21 | 21 | 27 | 17 | 109 | 21.8 | -6 | -26.1% |
| Eagleswood Township | Ocean | 17 | 11 | 9 | 11 | 10 | 58 | 11.6 | -7 | -41.2% |
| Mullica Township | Atlantic | 19 | 15 | 15 | 12 | 12 | 73 | 14.6 | -7 | -36.8% |
| Plumsted Township | Ocean | 21 | 15 | 13 | 15 | 14 | 78 | 15.6 | -7 | -33.3% |
| Woodbine Borough | Cape May | 10 | 19 | 13 | 6 | 3 | 51 | 10.2 | -7 | -70.0% |
| Medford Lakes Borough | Burlington | 17 | 10 | 7 | 9 | 8 | 51 | 10.2 | -9 | -52.9% |
| Pemberton Township | Burlington | 31 | 19 | 28 | 18 | 22 | 118 | 23.6 | -9 | -29.0% |
| Chesilhurst Borough | Camden | 14 | 10 | 7 | 5 | 4 | 40 | 8 | -10 | -71.4% |
| Beachwood Borough | Ocean | 21 | 6 | 11 | 5 | 9 | 52 | 10.4 | -12 | -57.1% |
| Buena Vista Township | Atlantic | 19 | 9 | 14 | 5 | 7 | 54 | 10.8 | -12 | -63.2% |
| Tabernacle Township | Burlington | 14 | 10 | 5 | 2 | 2 | 33 | 6.6 | -12 | -85.7% |
| Medford Township | Burlington | 67 | 2 | 21 | 37 | 51 | 178 | 35.6 | -16 | -23.9% |
| Hammonton Town | Atlantic | 27 | 19 | 15 | 5 | 10 | 76 | 15.2 | -17 | -63.0% |
| Southampton Township | Burlington | 29 | 19 | 13 | 13 | 10 | 84 | 16.8 | -19 | -65.5% |
| Berkeley Township | Ocean | 78 | 57 | 41 | 71 | 55 | 302 | 60.4 | -23 | -29.5% |
| Little Egg Harbor Township | Ocean | 106 | 53 | 55 | 72 | 76 | 362 | 72.4 | -30 | -28.3% |
| Franklin Township | Gloucester | 59 | 25 | 19 | 19 | 14 | 136 | 27.2 | -45 | -76.3% |
| Hamilton Township | Atlantic | 98 | 10 | 85 | 85 | 51 | 329 | 65.8 | -47 | -48.0% |
| Monroe Township | Gloucester | 151 | 104 | 89 | 208 | 63 | 615 | 123 | -88 | -58.3% |
| Galloway Township | Atlantic | 116 | 104 | 35 | 16 | 21 | 292 | 58.4 | -95 | -81.9% |
| Barnegat Township | Ocean | 176 | 143 | 142 | 118 | 51 | 630 | 126 | -125 | -71.0% |
| Winslow Township | Camden | 148 | 115 | 41 | 36 | 20 | 360 | 72 | -128 | -86.5% |
| Ocean Township | Ocean | 173 | 68 | 90 | 42 | 37 | 410 | 82 | -136 | -78.6% |
| Egg Harbor Township | Atlantic | 335 | 186 | 139 | 101 | 63 | 824 | 164.8 | -272 | -81.2% |
| <i>Outside Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | | | | |
| Springfield Township | Burlington | 2 | 0 | 1 | 1 | 2 | 6 | 1.2 | 0 | 0.0% |
| Corbin City | Atlantic | 3 | 6 | 2 | 5 | 2 | 18 | 3.6 | -1 | -33.3% |
| North Hanover Township | Burlington | 11 | 12 | 8 | 11 | 9 | 51 | 10.2 | -2 | -18.2% |
| Berlin Borough | Camden | 17 | 13 | 12 | 9 | 7 | 58 | 11.6 | -10 | -58.8% |
| Vineland City | Cumberland | 218 | 142 | 97 | 77 | 79 | 613 | 122.6 | -139 | -63.8% |
| Toms River Township | Ocean | 450 | 347 | 69 | 368 | 103 | 1337 | 267.4 | -347 | -77.1% |

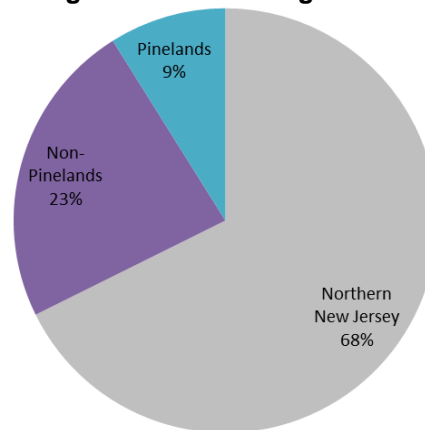
¹¹ Municipalities with small populations tend to experience greater volatility from one year to the next. This applies to all variables in this report, not just with building permits.

- After falling for the fifth consecutive year in 2009, residential real estate transactions in the Pinelands saw a slight upturn in 2010 before continuing to decline in 2011. Activity in the Pinelands fell by less than 1% overall in the two-year period, while the Non-Pinelands fell by 16%, and activity decreased by 10% Statewide.

Residential Property Transactions Normalized



Property Transactions Percentage of Total Housing Transactions by Region (2007 – 2011)



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

Unit of Analysis: Real estate transaction data are compiled at the municipal level and aggregated to allow for analysis inside/outside the Pinelands.

Summary of Previous Findings

The proportion of residential real estate transactions in the Pinelands (relative to the number of state transactions) remained relatively steady during the early course of the monitoring period from 1988 to 1999. The Pinelands' share of total transactions began shrinking in 1997, but began growing again in 1999. The actual number of transactions in all regions of the state declined substantially from the beginning of monitoring in 1988 through 1991. Residential real estate transactions then increased statewide between 1991 and 1996 followed by more substantial increases through 2004. Transactions held relatively steady in 2005. In 2006, activity showed a uniform decline of 7%, marking the first time since 1991 that transactions in all regions of the State decreased simultaneously.

Update:

The pace of residential transactions that began a steep decline in 2007 lessened through 2011. Activity in the Pinelands increased by 37% in 2010 to 4,440 residential real estate transactions. Likewise, the Non-Pinelands, southern New Jersey, and the state also experienced gains of 6.8% to 11,154 transactions, 13.9% to 15,594 transactions, and 11.7% to 49,306 transactions, respectively. Conversely, 2011 brought a decline in the number of transactions in the Pinelands (-27.7%), the Non-Pinelands (-21.6%), southern New Jersey (-23.3%), and the state (-19.6%).

The spatial pattern of transactions in the Pinelands appears to have shifted from the Philadelphia suburbs to the coastal region. In 2011, Jackson Township, Berkeley Township, Stafford Township, Egg Harbor Township, and Galloway Township saw more transactions (greater than 200) than any other municipality with greater than 10% of their total land area in the Pinelands boundary. As is the case with building permits, much of the activity in real estate transactions is occurring on the fringes of the Pinelands Area (Figure R2a and Figure R2b).

Of the 53 municipalities with any amount of land in the Pinelands boundary, five saw positive gains in 2010 *and* 2011. During the past five years, only two municipalities had positive gains (Wrightstown Borough and Weymouth Township) and 14 had decreases of more than 66% (scattered throughout the Pinelands Area). Conversely, Galloway Township, Jackson Township, Berkeley Township, Winslow Township, Vineland City, Evesham Township, Toms River Township, Hamilton Township, Monroe Township, and Egg Harbor Township each decreased their real estate transaction volume by more than 300 sales during the period 2007 to 2011 (Table R2).

Figure R2a

Residential Housing Transactions - 2010

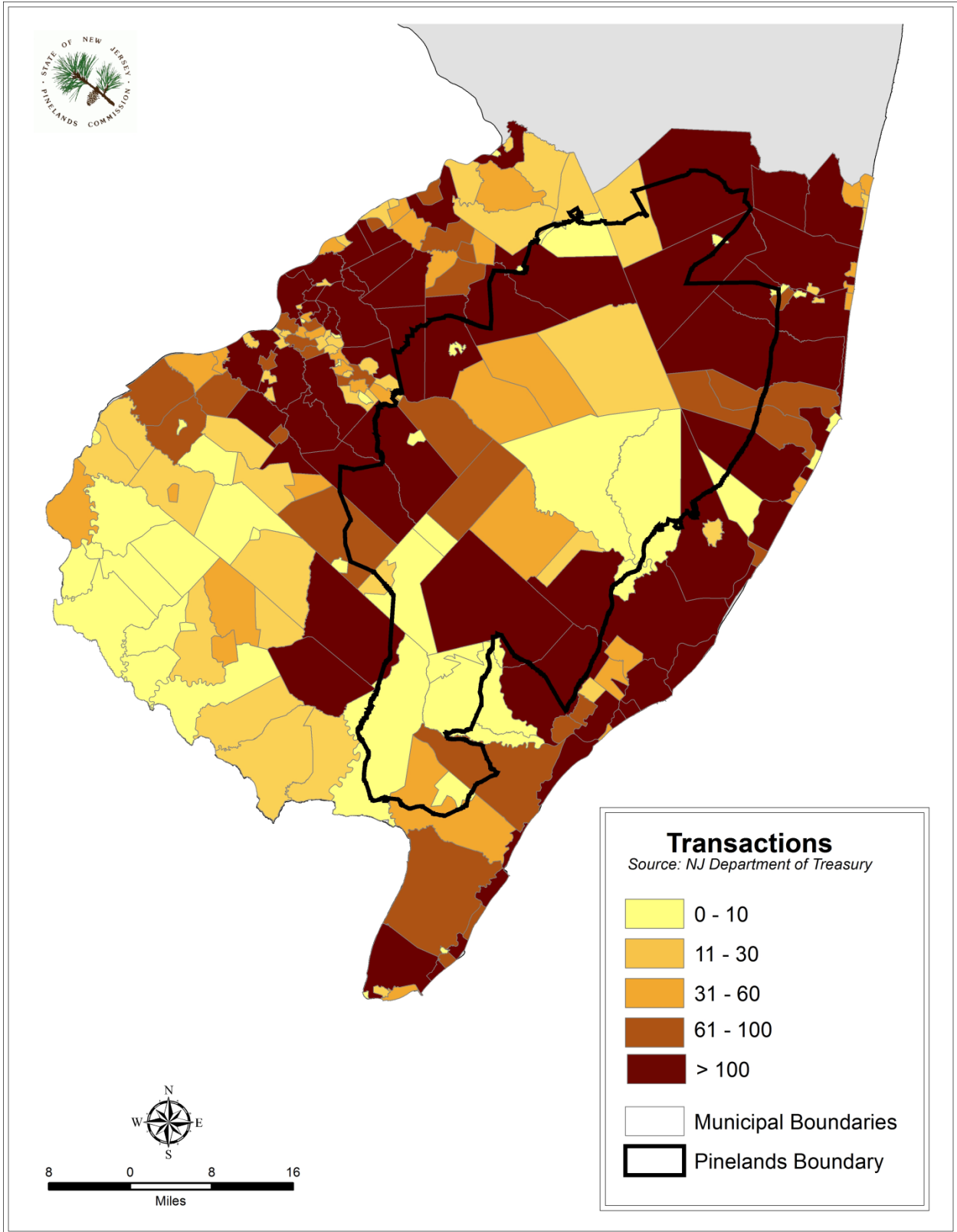


Figure R2b

Residential Housing Transactions - 2011

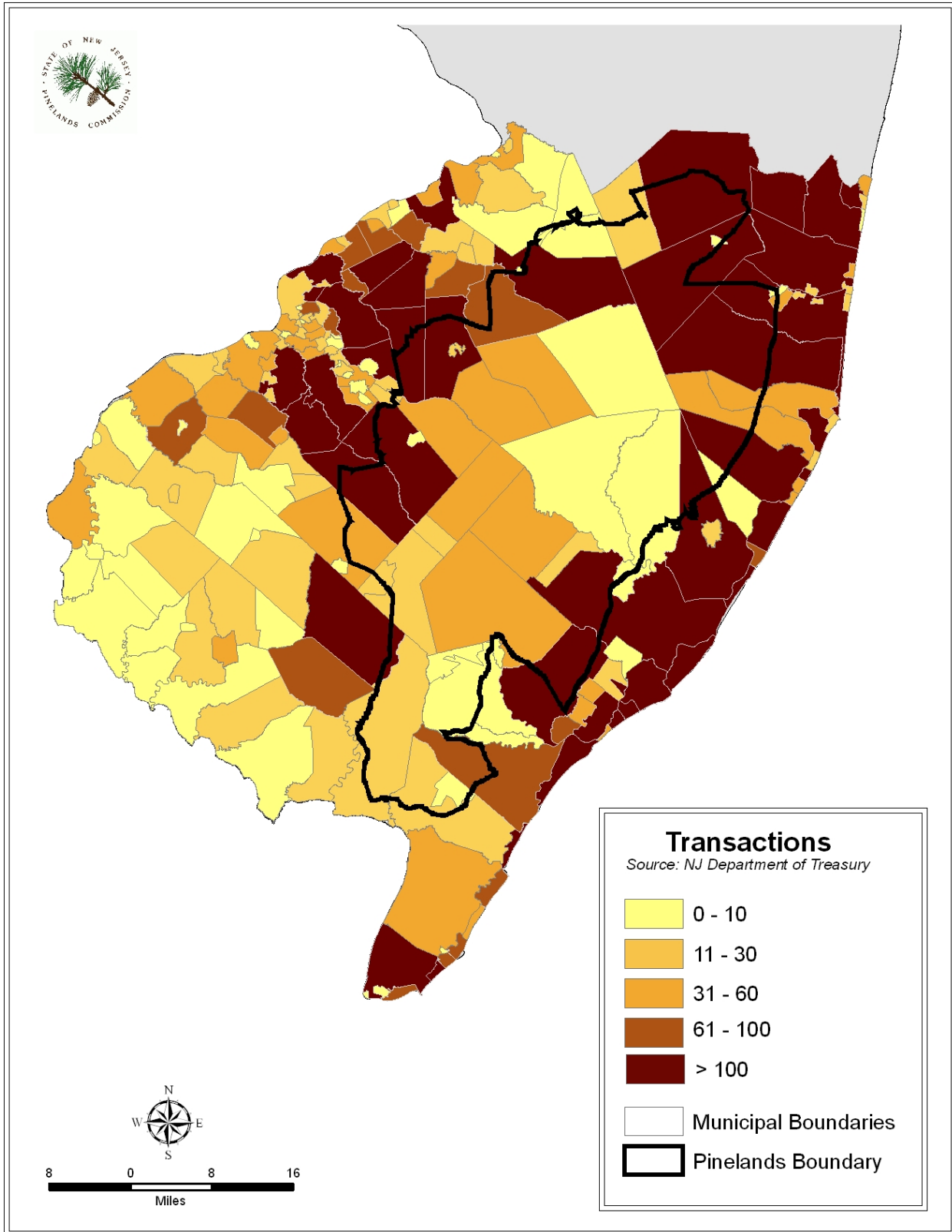


Table R2

Residential Housing Transactions

(Sorted by the 5 Year Change in Housing Transactions)

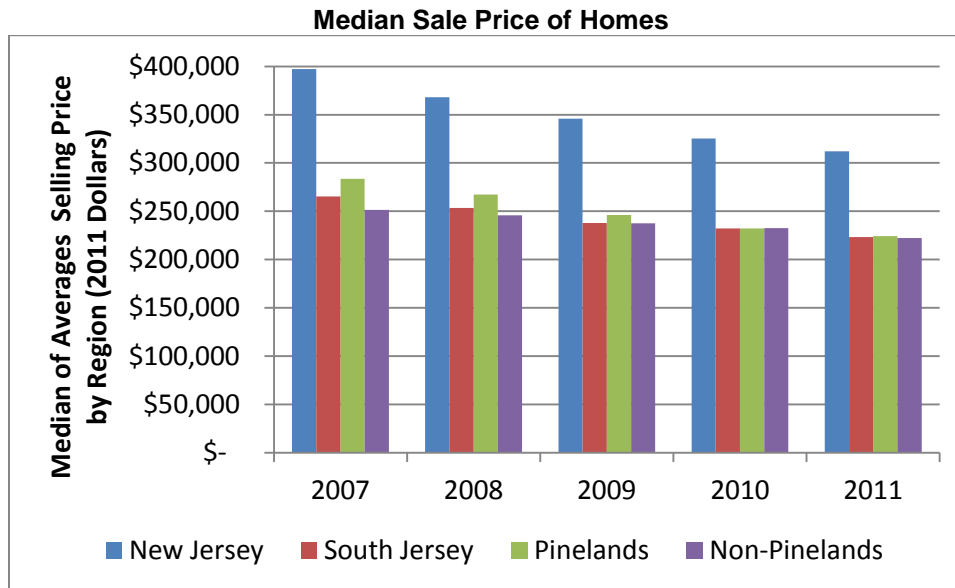
| Municipality | County | 2007 Sales | 2008 Sales | 2009 Sales | 2010 Sales | 2011 Sales | 5 Year Change | 5 Year % Change | 5 Year Average |
|---|------------|------------|------------|------------|------------|------------|---------------|-----------------|----------------|
| Weymouth Township | Atlantic | 3 | 7 | 6 | 10 | 4 | 1 | 33.3% | 6 |
| Wrightstown Borough | Burlington | 0 | 1 | 3 | 2 | 1 | 1 | 100.0% | 1 |
| Buena Borough | Atlantic | 20 | 33 | 13 | 19 | 19 | -1 | -5.0% | 21 |
| Estell Manor City | Atlantic | 6 | 13 | 6 | 7 | 5 | -1 | -16.7% | 7 |
| Washington Township | Burlington | 2 | 1 | 3 | 3 | 1 | -1 | -50.0% | 2 |
| Woodbine Borough | Cape May | 2 | 11 | 0 | 6 | 1 | -1 | -50.0% | 4 |
| Eagleswood Township | Ocean | 8 | 12 | 4 | 6 | 7 | -1 | -12.5% | 7 |
| Port Republic City | Atlantic | 9 | 9 | 4 | 9 | 7 | -2 | -22.2% | 8 |
| New Hanover Township | Burlington | 4 | 6 | 5 | 8 | 1 | -3 | -75.0% | 5 |
| Plumsted Township | Ocean | 25 | 54 | 24 | 24 | 22 | -3 | -12.0% | 30 |
| Woodland Township | Burlington | 11 | 11 | 4 | 12 | 5 | -6 | -54.5% | 9 |
| Buena Vista Township | Atlantic | 19 | 4 | 16 | 8 | 12 | -7 | -36.8% | 12 |
| Folsom Borough | Atlantic | 19 | 18 | 10 | 9 | 11 | -8 | -42.1% | 13 |
| Tabernacle Township | Burlington | 54 | 47 | 43 | 49 | 46 | -8 | -14.8% | 48 |
| Bass River Township | Burlington | 12 | 3 | 3 | 6 | 2 | -10 | -83.3% | 5 |
| Chesilhurst Borough | Camden | 16 | 0 | 2 | 3 | 6 | -10 | -62.5% | 5 |
| Beachwood Borough | Ocean | 55 | 80 | 47 | 63 | 42 | -13 | -23.6% | 57 |
| Maurice River Township | Cumberland | 28 | 20 | 14 | 5 | 13 | -15 | -53.6% | 16 |
| Dennis Township | Cape May | 41 | 38 | 20 | 36 | 22 | -19 | -46.3% | 31 |
| Lakehurst Borough | Ocean | 35 | 20 | 8 | 9 | 6 | -29 | -82.9% | 16 |
| Mullica Township | Atlantic | 62 | 42 | 29 | 35 | 31 | -31 | -50.0% | 40 |
| Egg Harbor City | Atlantic | 49 | 33 | 12 | 14 | 17 | -32 | -65.3% | 25 |
| Shamong Township | Burlington | 72 | 46 | 24 | 35 | 39 | -33 | -45.8% | 43 |
| Upper Township | Cape May | 113 | 119 | 51 | 67 | 78 | -35 | -31.0% | 86 |
| South Toms River Borough | Ocean | 41 | 27 | 15 | 5 | 6 | -35 | -85.4% | 19 |
| Medford Lakes Borough | Burlington | 64 | 51 | 43 | 7 | 26 | -38 | -59.4% | 38 |
| Berlin Township | Camden | 53 | 48 | 16 | 17 | 15 | -38 | -71.7% | 30 |
| Barneгат Township | Ocean | 83 | 133 | 89 | 76 | 35 | -48 | -57.8% | 83 |
| Hammonton Town | Atlantic | 117 | 78 | 80 | 61 | 60 | -57 | -48.7% | 79 |
| Ocean Township | Ocean | 134 | 89 | 71 | 66 | 58 | -76 | -56.7% | 84 |
| Franklin Township | Gloucester | 153 | 121 | 92 | 91 | 59 | -94 | -61.4% | 103 |
| Waterford Township | Camden | 127 | 110 | 66 | 77 | 32 | -95 | -74.8% | 82 |
| Southampton Township | Burlington | 189 | 148 | 95 | 115 | 88 | -101 | -53.4% | 127 |
| Medford Township | Burlington | 272 | 209 | 147 | 182 | 159 | -113 | -41.5% | 194 |
| Stafford Township | Ocean | 357 | 331 | 210 | 277 | 217 | -140 | -39.2% | 278 |
| Little Egg Harbor Township | Ocean | 370 | 269 | 136 | 193 | 132 | -238 | -64.3% | 220 |
| Lacey Township | Ocean | 422 | 301 | 89 | 217 | 159 | -263 | -62.3% | 238 |
| Pemberton Township | Burlington | 392 | 277 | 178 | 189 | 119 | -273 | -69.6% | 231 |
| Manchester Township | Ocean | 454 | 318 | 70 | 215 | 181 | -273 | -60.1% | 248 |
| Monroe Township | Gloucester | 423 | 89 | 172 | 195 | 117 | -306 | -72.3% | 199 |
| Egg Harbor Township | Atlantic | 548 | 383 | 237 | 332 | 226 | -322 | -58.8% | 345 |
| Jackson Township | Ocean | 636 | 513 | 120 | 393 | 249 | -387 | -60.8% | 382 |
| Galloway Township | Atlantic | 657 | 416 | 86 | 302 | 227 | -430 | -65.4% | 338 |
| Hamilton Township | Atlantic | 514 | 286 | 197 | 239 | 48 | -466 | -90.7% | 257 |
| Berkeley Township | Ocean | 721 | 464 | 265 | 150 | 239 | -482 | -66.9% | 368 |
| Winslow Township | Camden | 704 | 444 | 271 | 220 | 183 | -521 | -74.0% | 364 |
| Evesham Township | Burlington | 795 | 399 | 145 | 376 | 179 | -616 | -77.5% | 379 |
| <i>Outside Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | | | |
| Corbin City | Atlantic | 1 | 1 | 4 | 1 | 1 | 0 | 0.0% | 2 |
| Springfield Township | Burlington | 16 | 19 | 14 | 14 | 7 | -9 | -56.3% | 14 |
| North Hanover Township | Burlington | 18 | 22 | 18 | 12 | 6 | -12 | -66.7% | 15 |
| Berlin Borough | Camden | 83 | 63 | 45 | 53 | 11 | -72 | -86.7% | 51 |
| Vineland City | Cumberland | 527 | 342 | 222 | 303 | 196 | -331 | -62.8% | 318 |
| Toms River Township | Ocean | 1334 | 1093 | 244 | 891 | 523 | -811 | -60.8% | 817 |

Median Selling Price of Homes

N.J. Dept. of Treasury, Division of Taxation 1989 - 2011

X Updated

- In 2010 and 2011, home prices continued to drop due to economic recession. Median average home prices for the two years fell 9.7% Statewide, 8.8% in the Pinelands, 6.4% in the Non-Pinelands, and 6.1% in southern New Jersey.



Description: The median average selling price for homes sold in each municipality in a given year is derived from sales data compiled by the New Jersey Department of Treasury. Selling prices are shown in 2011 dollars. Then, for comparison purposes regionally and to avoid outliers, the median of these averages is reported.

Unit of Analysis: Average home values at the municipal level are gathered then the median value is utilized to represent its respective region.

Summary of Previous Findings

Median selling prices of homes inside and outside of the Pinelands Area declined from the beginning of the monitoring period (1989) into the early 1990s, and increased slightly in subsequent years through 2001. This period encompassed the end of a real estate boom, recession, and subsequent recovery. Prices began to escalate for all regions in 2002, in spite of a recession in 2001 and weak job market thereafter. Prices continued their steady climb through 2006 across all regions. Overall, median selling prices were slightly higher in the Non-Pinelands than in the Pinelands, which is consistent with data from the years prior to implementation of the New Jersey Pineland Commission's *Comprehensive Management Plan* and shortly thereafter.¹² Historically, median selling prices at the state level have been substantially higher than those for southern New Jersey.

In 2009, the median sales price of homes across all regions continued to decline as activity in the real estate market slowed considerably for the third straight year. The median, inflation-adjusted sales price of a home fell by 4.2% in the Pinelands, 4.8% in the Non-Pinelands, and 7.0% statewide for the year. The year 2009 also marked the fifth consecutive year that the median sale price of homes in the Pinelands (\$234,000) was 4% higher than that of homes in the Non-Pinelands (\$225,000).

¹² See *Economic & Fiscal Impacts of the Comprehensive Management Plan*, New Jersey Pinelands Commission, 1983.

Update:

For the sixth straight year, the median average sales price of homes declined across all regions. Adjusted for inflation, 2011 median average homes sales prices fell 8.8% in the Pinelands, 6.4% in the Non-Pinelands, and 9.7% across New Jersey from 2009 prices. As in 2009, 2011 median home prices in the Pinelands (\$224,408) exceeded that of homes in the Non-Pinelands (\$222,213) by 1%. However, in 2010, median home prices were approximately 0.2% higher in the Non-Pinelands.

Among the 53 municipalities with any amount of land inside the Pinelands Area boundary 39 saw their highest five-year price in 2007, five in 2008, two in 2009, three in 2010, and four in 2011. The four municipalities that saw their highest prices in 2011 are Woodbine Borough, Wrightstown Borough, Maurice River Township, and Corbin City. Of the Pinelands municipalities with the highest 2011 home prices, three of the top five are in Burlington County (Shamong Township, Medford Township and Tabernacle Township) while Ocean and Cape May Counties each have one municipality in the top five. This is opposed to 2009 when Burlington County held four of the top five municipalities.

Figure R3a

Average Home Sales Prices - 2010

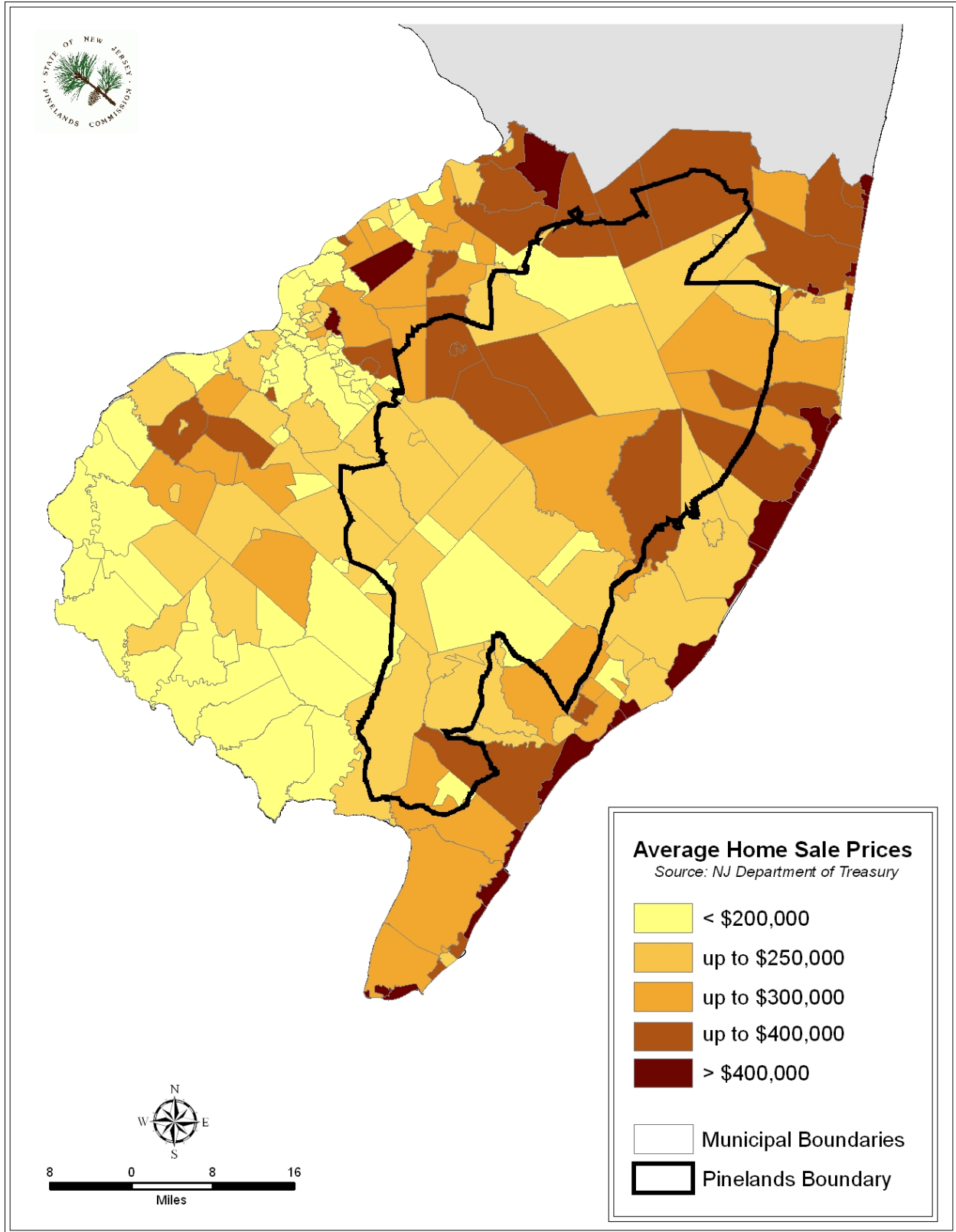


Figure R3b

Average Home Sales Prices - 2011

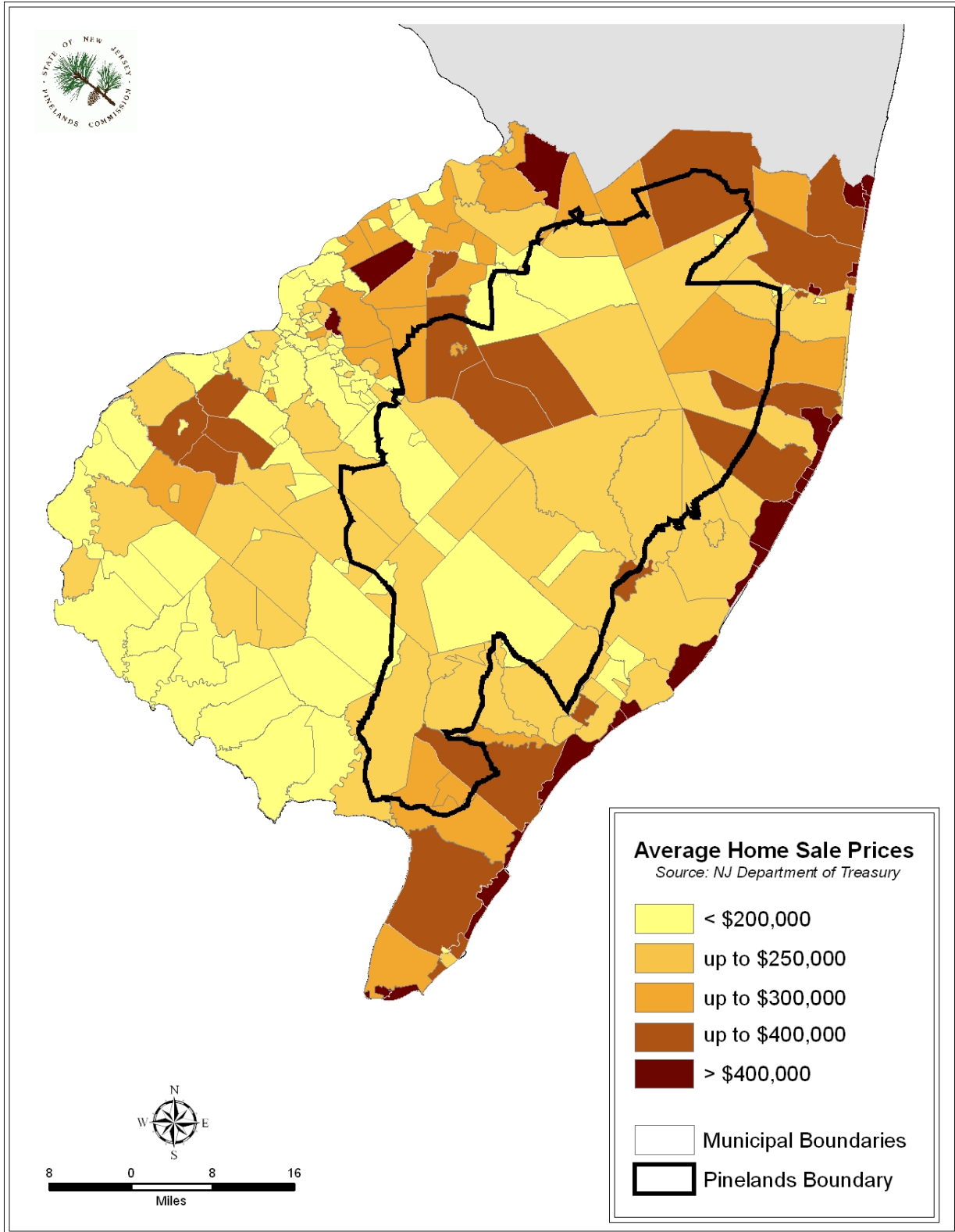
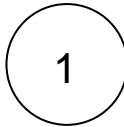
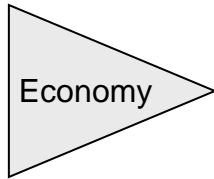


Table R3

Average Home Values
(Sorted by the 2011 Average Home Sale Price)

| Municipality | County | 2007 Average Sale Price | 2008 Average Sale Price | 2009 Average Sale Price | 2010 Average Sale Price | 2011 Average Sale Price | 2011 Southern NJ Rank |
|---|------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-----------------------------|
| Medford Township | Burlington | \$433,386 | \$412,206 | \$393,861 | \$355,538 | \$361,859 | 31 |
| Upper Township | Cape May | \$358,394 | \$361,158 | \$365,032 | \$362,845 | \$344,332 | 32 |
| Tabernacle Township | Burlington | \$384,735 | \$343,980 | \$351,535 | \$314,248 | \$326,895 | 37 |
| Shamong Township | Burlington | \$446,326 | \$465,227 | \$388,613 | \$389,282 | \$322,315 | 39 |
| Jackson Township | Ocean | \$395,338 | \$362,945 | \$319,033 | \$331,328 | \$317,262 | 40 |
| Port Republic City | Atlantic | \$368,373 | \$331,071 | \$324,375 | \$261,720 | \$312,143 | 42 |
| Ocean Township | Ocean | \$335,372 | \$299,463 | \$325,990 | \$314,487 | \$303,473 | 44 |
| Stafford Township | Ocean | \$392,201 | \$350,497 | \$321,597 | \$310,883 | \$301,639 | 47 |
| Woodbine Borough | Cape May | \$291,830 | \$209,369 | - | \$194,519 | \$299,999 | 48 |
| Lacey Township | Ocean | \$347,882 | \$327,943 | \$289,575 | \$287,713 | \$298,773 | 49 |
| Plumsted Township | Ocean | \$432,251 | \$372,432 | \$317,927 | \$316,652 | \$296,541 | 50 |
| Medford Lakes Borough | Burlington | \$330,846 | \$314,186 | \$331,585 | \$363,111 | \$286,075 | 55 |
| Wrightstown Borough | Burlington | - | \$177,608 | \$168,457 | \$220,136 | \$282,000 | 56 |
| Evesham Township | Burlington | \$314,908 | \$276,875 | \$279,531 | \$257,748 | \$279,795 | 58 |
| Dennis Township | Cape May | \$330,162 | \$318,070 | \$283,103 | \$269,837 | \$265,836 | 65 |
| Barneget Township | Ocean | \$343,767 | \$303,379 | \$303,621 | \$286,893 | \$244,900 | 78 |
| Egg Harbor Township | Atlantic | \$298,393 | \$277,336 | \$265,238 | \$256,209 | \$242,759 | 80 |
| Mullica Township | Atlantic | \$241,534 | \$286,307 | \$276,266 | \$230,552 | \$235,694 | 85 |
| New Hanover Township | Burlington | \$385,129 | \$352,953 | \$295,358 | \$305,756 | \$235,000 | 86 |
| Bass River Township | Burlington | \$291,984 | \$337,630 | \$310,002 | \$300,529 | \$232,000 | 89 |
| Weymouth Township | Atlantic | \$265,070 | \$354,448 | \$204,088 | \$246,183 | \$231,375 | 90 |
| Berkeley Township | Ocean | \$275,534 | \$267,210 | \$252,196 | \$231,813 | \$229,913 | 91 |
| Estell Manor City | Atlantic | \$325,009 | \$243,307 | \$321,186 | \$241,268 | \$225,800 | 96 |
| Buena Vista Township | Atlantic | \$213,320 | \$214,123 | \$200,232 | \$227,138 | \$224,408 | 98 |
| Beachwood Borough | Ocean | \$299,089 | \$281,339 | \$273,079 | \$264,210 | \$223,219 | 100 |
| Eagleswood Township | Ocean | \$337,394 | \$267,414 | \$240,103 | \$236,916 | \$222,643 | 101 |
| Hammonton Town | Atlantic | \$257,992 | \$231,480 | \$227,871 | \$232,172 | \$220,676 | 105 |
| Maurice River Township | Cumberland | \$174,457 | \$204,882 | \$176,887 | \$218,279 | \$219,454 | 106 |
| Little Egg Harbor Township | Ocean | \$292,321 | \$270,974 | \$259,281 | \$235,863 | \$212,624 | 108 |
| Galloway Township | Atlantic | \$243,619 | \$225,102 | \$219,472 | \$210,058 | \$210,036 | 111 |
| Washington Township | Burlington | \$318,138 | \$229,846 | \$251,986 | \$292,277 | \$207,500 | 113 |
| Franklin Township | Gloucester | \$252,791 | \$244,060 | \$231,502 | \$216,470 | \$207,193 | 114 |
| Monroe Township | Gloucester | \$257,898 | \$253,471 | \$236,889 | \$219,338 | \$202,909 | 117 |
| Woodland Township | Burlington | \$275,636 | \$325,422 | \$210,982 | \$206,218 | \$202,700 | 118 |
| Manchester Township | Ocean | \$262,799 | \$237,200 | \$231,236 | \$201,430 | \$201,694 | 120 |
| Waterford Township | Camden | \$228,999 | \$224,386 | \$219,904 | \$202,234 | \$200,627 | 121 |
| Hamilton Township | Atlantic | \$232,539 | \$226,539 | \$212,442 | \$189,795 | \$193,823 | 128 |
| Southampton Township | Burlington | \$269,831 | \$256,034 | \$205,265 | \$219,671 | \$191,909 | 129 |
| Folsom Borough | Atlantic | \$232,699 | \$217,022 | \$197,157 | \$174,140 | \$191,140 | 130 |
| South Toms River Borough | Ocean | \$253,562 | \$228,442 | \$225,766 | \$195,100 | \$190,383 | 131 |
| Winslow Township | Camden | \$216,171 | \$211,997 | \$215,017 | \$201,803 | \$187,957 | 138 |
| Buena Borough | Atlantic | \$197,631 | \$177,906 | \$175,254 | \$181,061 | \$178,911 | 145 |
| Berlin Township | Camden | \$215,295 | \$214,642 | \$207,586 | \$183,746 | \$173,150 | 152 |
| Lakehurst Borough | Ocean | \$231,018 | \$229,867 | \$233,681 | \$200,639 | \$171,167 | 156 |
| Pemberton Township | Burlington | \$215,165 | \$204,654 | \$195,473 | \$179,027 | \$171,072 | 157 |
| Chesilhurst Borough | Camden | \$173,799 | - | \$146,788 | \$212,296 | \$157,167 | 168 |
| Egg Harbor City | Atlantic | \$225,487 | \$209,952 | \$177,456 | \$174,913 | \$144,753 | 180 |
| <i>Outside Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | |
| Toms River Township | Ocean | \$398,744 | \$373,236 | \$351,156 | \$358,639 | \$370,711 | 29 |
| Corbin City | Atlantic | \$124,760 | \$47,014 | \$107,142 | \$245,513 | \$274,000 | 61 |
| North Hanover Township | Burlington | \$440,915 | \$350,240 | \$355,547 | \$332,336 | \$265,167 | 66 |
| Springfield Township | Burlington | \$404,982 | \$389,059 | \$274,636 | \$368,409 | \$236,571 | 84 |
| Berlin Borough | Camden | \$300,328 | \$271,784 | \$262,557 | \$237,554 | \$234,214 | 87 |
| Vineland City | Cumberland | \$207,159 | \$196,931 | \$188,731 | \$185,935 | \$168,467 | 160 |



Per Capita Income

U.S. Census Bureau 1979, 1989, 1999, 2010



- Per Capita Income continues to be lower in the Pinelands than in the Non-Pinelands, but is growing at a somewhat faster rate.

Per Capita Income (2010 \$)

| Region | 1979 | 1989 | 1999 | 2010 | Change 1999 - 2010 | Change 1979 - 2010 |
|---------------|----------|----------|----------|----------|--------------------|--------------------|
| New Jersey | \$24,410 | \$32,909 | \$35,347 | \$34,858 | -1.4% | 42.8% |
| South Jersey | \$21,642 | \$29,838 | \$31,168 | \$32,312 | 3.7% | 49.3% |
| Non-Pinelands | \$22,398 | \$31,042 | \$32,098 | \$32,839 | 2.3% | 46.6% |
| Pinelands | \$19,147 | \$25,868 | \$28,101 | \$29,198 | 3.9% | 52.5% |

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, and provides a measure of the economic well-being of individuals.

Unit of Analysis: Per capita income data are compiled at the municipal level and aggregated to allow for inside/outside the Pinelands and statewide analyses.

Summary of Previous Findings

Real per capita income increased significantly inside and outside of the Pinelands area during the 1980s. Per capita income growth in the Pinelands kept pace and finished slightly behind the surrounding region in terms of percentage change between 1980 and 1990. The level of per capita income remained higher in absolute terms in the Non-Pinelands region compared to the Pinelands region.

Per capita income continued to increase during the 1990s, but the rate of growth was much lower than in the 1980s. The Pinelands region experienced an 11% increase in income levels between 1989 and 1999, compared to an increase of 7% for the state and 3% for the Non-Pinelands region. While the Pinelands region is catching up to the rest of the state, its income levels are still significantly lower than the rest of the state. Medford Township, Medford Lakes Borough, and Shamong Township had the highest incomes in the Pinelands, while New Hanover Township, Washington Township, and Woodbine Borough had the lowest income levels. Woodland Township experienced the largest increase in income between 1990 and 2000 (74%), while Washington Township had the largest decrease (40%). The changes in both towns are anomalies related to shifts in institutional group quarters population and volatility due to small population size. A positive sign is that many towns with the lowest per capita incomes experienced the largest increases in income (i.e. Woodbine Borough, Wrightstown Borough, South Toms River Borough, Maurice River Township, and Lakehurst Borough).

Geographically, income levels appear as a series of bands that run across Southern New Jersey. A band of higher income surrounds the Philadelphia metropolitan area and stretches into the upper-middle portion of the Pinelands. This band represents suburbanizing communities outside of the city. The band is actually split in two by older, working class suburbs and rural communities that have only begun to suburbanize. Another thin band of high income stretches along the shore. A band of more moderate income stretches across the south-central half of the state, and a smaller, moderate income area is located in the northeastern part of Southern New Jersey. These communities tend to be rural communities, with some experiencing recent suburbanization. A region of poverty exists in the extreme southern portion of the state, along with a small pocket of lower income in the heart of the Pinelands. These areas are predominantly rural, and are the least impacted by development. Smaller pockets of poverty persist in the military towns of Burlington County, and in the older urban areas such as Camden and Atlantic City, which have suffered economic hardship. It is interesting to note that while the Pinelands does have a lower per capita income than the Non-Pinelands region, these bands of different income stretch across southern New Jersey regardless of the Pinelands Area boundary.

Update

Income growth was flat during the period of 1999 to 2010. From 1979 to 1989, per capita income in the Pinelands grew by 35.1% then through 1999 it grew by 8.6%. Per capita income in the Pinelands increased 3.9% by 2010; a lower rate than seen in previous decades. In comparison, the Non-Pinelands region has also seen its per capita income increasing at a decreasing rate, though a slightly faster decrease than in the Pinelands. Per capita income in the Non-Pinelands increased 38.6% from 1979 through 1989, then by 3.4% through 1999 and now by 2.3% in 2010. The state as a whole has seen a similar trend, except for a recent *decrease* of 1.4% from 1999 through 2010.

Despite this higher percentage gains in per capita income during the past three decades, the Pinelands historically has a lower per capita income than the rest of New Jersey. In 2010, per capita income in the Pinelands reached \$29,198 compared to \$32,839 in the Non-Pinelands and \$34,858 in the state as a whole.

In terms of the municipalities during the entire 30-year period (1979 to 2010), 14 municipalities in the Pinelands saw per capita income grow by 65 to 100% (more than 2% per year), 24 grew by 30 to 65% (1 to 2% per year), six grew by 10 to 30% (<1% per year), and three were essentially stagnant (Egg Harbor City, New Hanover Township, and Maurice River Township).

During the last decade, 16 municipalities saw declines in per capita income (three exceeded -10%: South Toms River Borough, Maurice River Township, and Galloway Township), while 19 had up to 10% growth, seven had grown 10 to 20%, and five had grown more than 20% (Ocean Township, Franklin Township, Chesilhurst Borough, Wrightstown Borough, and Washington Township).

Figure E1

Per Capita Income – 2010

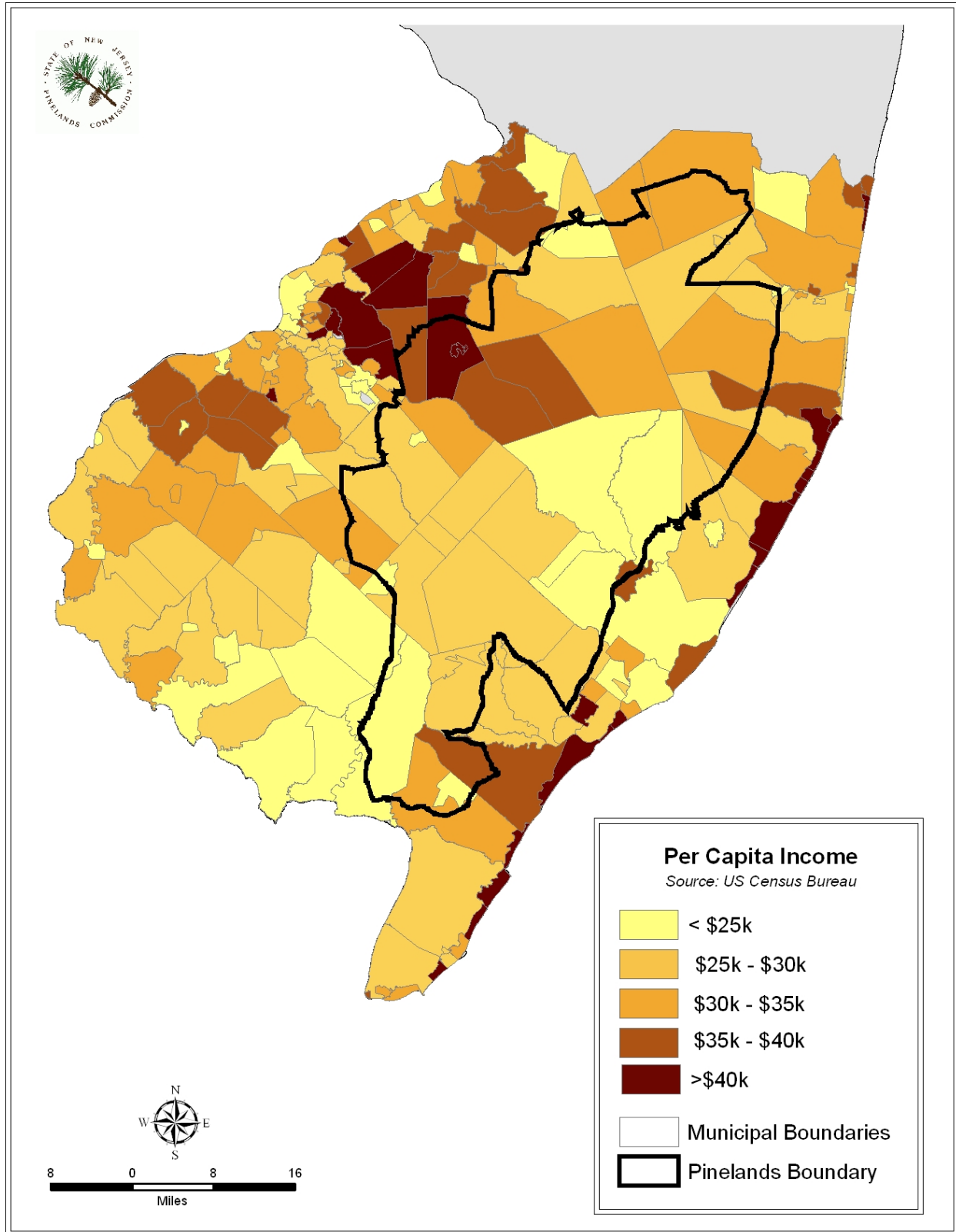


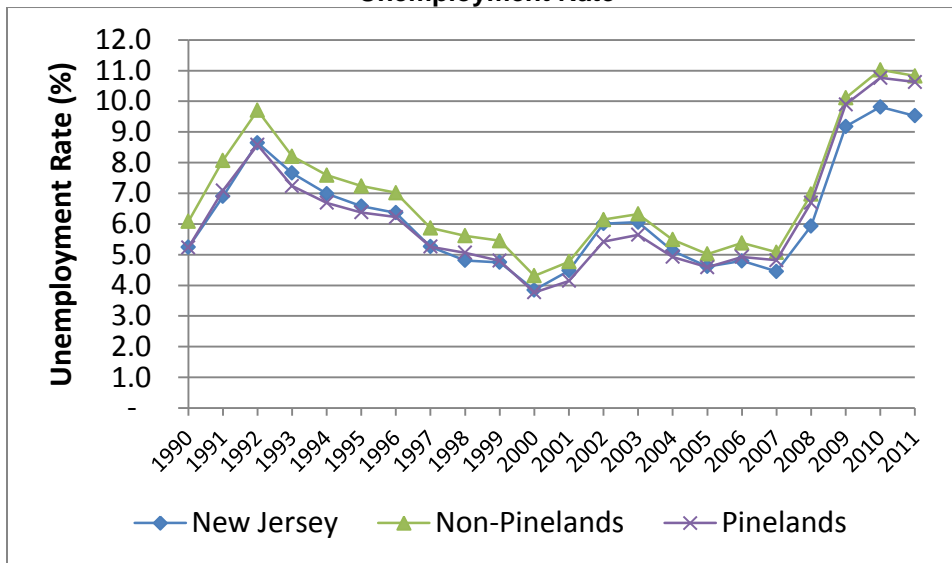
Table E1

Per Capita Income by Pinelands Municipality
(Adjusted to 2010 Dollars)
(Sorted by 2010 Per Capita Income)

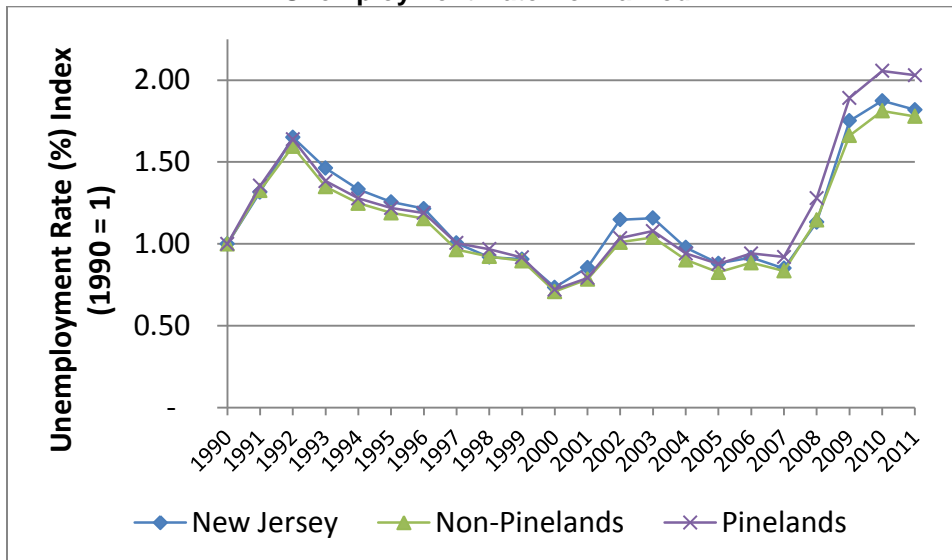
| Municipality | County | 1979 Per Capita Income | 1989 Per Capita Income | 1999 Per Capita Income | 2010 Per Capita Income | % Change 1999 - 2010 | % Change 1979 - 2010 |
|---|------------|------------------------|------------------------|------------------------|------------------------|----------------------|----------------------|
| Medford Lakes Borough | Burlington | \$28,564 | \$38,983 | \$41,075 | \$48,789 | 18.8% | 70.8% |
| Medford Township | Burlington | \$28,705 | \$43,230 | \$50,576 | \$45,926 | -9.2% | 60.0% |
| Evesham Township | Burlington | \$25,914 | \$35,146 | \$38,604 | \$39,910 | 3.4% | 54.0% |
| Shamong Township | Burlington | \$21,989 | \$33,078 | \$40,488 | \$38,817 | -4.1% | 76.5% |
| Upper Township | Cape May | \$21,634 | \$30,978 | \$35,991 | \$38,702 | 7.5% | 78.9% |
| Ocean Township | Ocean | \$21,094 | \$23,677 | \$29,881 | \$36,895 | 23.5% | 74.9% |
| Tabernacle Township | Burlington | \$20,920 | \$35,731 | \$36,483 | \$36,726 | 0.7% | 75.6% |
| Port Republic City | Atlantic | \$24,229 | \$30,953 | \$31,896 | \$36,408 | 14.1% | 50.3% |
| Jackson Township | Ocean | \$20,052 | \$28,323 | \$31,388 | \$34,521 | 10.0% | 72.2% |
| Southampton Township | Burlington | \$23,070 | \$29,343 | \$35,309 | \$34,493 | -2.3% | 49.5% |
| Woodland Township | Burlington | \$12,263 | \$19,636 | \$34,195 | \$33,552 | -1.9% | 173.6% |
| Franklin Township | Gloucester | \$18,460 | \$23,758 | \$26,540 | \$32,141 | 21.1% | 74.1% |
| Plumsted Township | Ocean | \$19,126 | \$26,432 | \$29,362 | \$31,719 | 8.0% | 65.8% |
| Stafford Township | Ocean | \$20,076 | \$25,724 | \$33,241 | \$31,690 | -4.7% | 57.9% |
| Lacey Township | Ocean | \$19,862 | \$26,163 | \$30,282 | \$31,552 | 4.2% | 58.9% |
| Waterford Township | Camden | \$18,784 | \$25,683 | \$28,371 | \$31,193 | 9.9% | 66.1% |
| Dennis Township | Cape May | \$18,739 | \$26,907 | \$28,082 | \$30,545 | 8.8% | 63.0% |
| Folsom Borough | Atlantic | \$19,202 | \$23,311 | \$26,985 | \$29,446 | 9.1% | 53.4% |
| Barnegat Township | Ocean | \$17,255 | \$45,674 | \$25,270 | \$29,192 | 15.5% | 69.2% |
| Egg Harbor Township | Atlantic | \$20,613 | \$27,895 | \$29,224 | \$29,114 | -0.4% | 41.2% |
| Weymouth Township | Atlantic | \$18,126 | \$23,826 | \$24,851 | \$28,857 | 16.1% | 59.2% |
| Little Egg Harbor Township | Ocean | \$19,235 | \$25,045 | \$26,987 | \$28,566 | 5.8% | 48.5% |
| Beachwood Borough | Ocean | \$18,544 | \$25,516 | \$27,809 | \$28,366 | 2.0% | 53.0% |
| Monroe Township | Gloucester | \$19,021 | \$24,167 | \$26,816 | \$28,270 | 5.4% | 48.6% |
| Berkeley Township | Ocean | \$19,087 | \$24,362 | \$29,054 | \$28,168 | -3.0% | 47.6% |
| Eagleswood Township | Ocean | \$16,099 | \$23,089 | \$26,985 | \$28,135 | 4.3% | 74.8% |
| Winslow Township | Camden | \$19,066 | \$24,647 | \$27,819 | \$27,884 | 0.2% | 46.2% |
| Estell Manor City | Atlantic | \$19,406 | \$27,538 | \$25,482 | \$27,838 | 9.2% | 43.5% |
| Manchester Township | Ocean | \$21,797 | \$26,212 | \$29,330 | \$27,264 | -7.0% | 25.1% |
| Lakehurst Borough | Ocean | \$15,735 | \$18,456 | \$24,070 | \$27,171 | 12.9% | 72.7% |
| Buena Vista Township | Atlantic | \$16,973 | \$22,182 | \$24,059 | \$26,640 | 10.7% | 57.0% |
| Pemberton Township | Burlington | \$16,988 | \$22,175 | \$25,180 | \$26,240 | 4.2% | 54.5% |
| Mullica Township | Atlantic | \$19,328 | \$24,371 | \$25,868 | \$26,217 | 1.3% | 35.6% |
| Berlin Township | Camden | \$18,733 | \$23,747 | \$29,027 | \$26,184 | -9.8% | 39.8% |
| Hammonton Town | Atlantic | \$21,352 | \$27,503 | \$26,032 | \$26,130 | 0.4% | 22.4% |
| Hamilton Township | Atlantic | \$20,334 | \$28,045 | \$27,890 | \$25,292 | -9.3% | 24.4% |
| Washington Township | Burlington | \$16,703 | \$30,327 | \$18,294 | \$24,808 | 35.6% | 48.5% |
| Chesilhurst Borough | Camden | \$15,711 | \$19,688 | \$19,963 | \$24,646 | 23.5% | 56.9% |
| Bass River Township | Burlington | \$19,379 | \$22,857 | \$26,677 | \$24,440 | -8.4% | 26.1% |
| Galloway Township | Atlantic | \$19,856 | \$28,667 | \$27,549 | \$24,302 | -11.8% | 22.4% |
| Wrightstown Borough | Burlington | \$11,606 | \$15,072 | \$18,964 | \$24,231 | 27.8% | 108.8% |
| Buena Borough | Atlantic | \$19,451 | \$20,967 | \$21,880 | \$23,044 | 5.3% | 18.5% |
| Egg Harbor City | Atlantic | \$20,823 | \$21,966 | \$19,831 | \$22,294 | 12.4% | 7.1% |
| South Toms River Borough | Ocean | \$14,717 | \$17,638 | \$21,324 | \$19,177 | -10.1% | 30.3% |
| Woodbine Borough | Cape May | \$11,089 | \$13,238 | \$17,454 | \$15,734 | -9.9% | 41.9% |
| Maurice River Township | Cumberland | \$14,564 | \$17,918 | \$22,435 | \$15,705 | -30.0% | 7.8% |
| New Hanover Township | Burlington | \$15,639 | \$15,955 | \$15,890 | \$15,387 | -3.2% | -1.6% |
| <i>Outside Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | |
| Springfield Township | Burlington | \$22,241 | \$32,633 | \$38,378 | \$37,901 | -1.2% | 70.4% |
| Berlin Borough | Camden | \$23,647 | \$27,744 | \$32,296 | \$33,672 | 4.3% | 42.4% |
| Toms River Township | Ocean | \$21,917 | \$30,431 | \$32,735 | \$33,423 | 2.1% | 52.5% |
| North Hanover Township | Burlington | \$16,102 | \$19,769 | \$23,010 | \$29,529 | 28.3% | 83.4% |
| Corbin City | Atlantic | \$20,875 | \$26,576 | \$27,906 | \$28,347 | 1.6% | 35.8% |
| Vineland City | Cumberland | \$18,481 | \$22,796 | \$24,603 | \$24,512 | -0.4% | 32.6% |

- Unemployment rates continued to rise in 2010, but subsided somewhat in 2011 in parallel to the national recession and upturn.
- Southern New Jersey was hit harder than northern New Jersey in the two-year period. Unemployment rates increased by 0.3% in the 2 years in the state and 0.7% in both the Pinelands and the Non-Pinelands.

Unemployment Rate



Unemployment Rate Normalized



Description: The unemployment rate is the proportion of the labor force (defined as the number of people available to be, and desiring to be, working for pay) residing in an area that is unemployed (not working for pay) at a given point in time.

Unit of Analysis: Municipal level data are aggregated to allow for inside/outside the Pinelands and statewide analyses. Values are based on sums for each region and not average.

Summary of Previous Findings

Trends in unemployment in the Pinelands and the Non-Pinelands regions have tracked closely together, with levels in the Pinelands consistently lower than levels in the Non-Pinelands from 1990 to 2000. Unemployment in New Jersey appeared to follow general economic conditions, declining in the mid-1980s before increasing at the turn of the decade during the recession. Following a peak in 1992, unemployment levels declined steadily, roughly 4% by 2000, coinciding with a period of economic growth. Unemployment rose in 2001 with the onset of recession, with modest increases in unemployment in 2002 and 2003. In 2004, unemployment decreased in all regions of the state for the first time in four years and was followed in 2005 by another 0.5% decrease. From 2006 to 2007, rates remained relatively steady and close to historical lows for all areas of the state.

The national job market responded as expected to the widening recession in 2009. According to the United States Bureau of Labor statistics, approximately 15.2 million Americans were unemployed in 2009, compared to 11.3 million in 2008. The national unemployment rate increased from 7.3% in 2008 to 9.9% in 2009.

In comparison to the national average, unemployment rates in New Jersey fared slightly better, with the statewide unemployment rate increasing from 5.5% in 2008 to 9.1% in 2009. The southern New Jersey job market seemed to be hit much harder than the northern New Jersey job market in 2009. In the Pinelands, the unemployment rate increased 3.8% for the year, going from 6.2% in 2008 to 10% in 2009. The Non-Pinelands experienced a similar increase in unemployment during the year (+4.1%), finishing with an average rate of 10.1% for the year.

Unemployment rates in southern New Jersey are generally the lowest in the easternmost suburbs of Trenton and Philadelphia. The highest rates in southern New Jersey are found in Cumberland and Atlantic Counties. Although the Pinelands communities generally exhibit lower unemployment rates than the rest of southern New Jersey, some of the central and southern municipalities in the Pinelands have been more negatively affected over the past three years, with rates increasing by more than 5% between 2006 and 2009. Of the 21 Pinelands municipalities with unemployment increases of greater than 5% over that time, 10 are located in Ocean and Burlington counties (Berkeley Township, Manchester Township, South Toms River Borough, Washington Township, Wrightstown Borough, Lakehurst Borough, Southampton Township, Ocean Township, Woodland Township, and Lacey Township).

Update

The national job market responded as expected to the continuing recession through 2010, but improved slightly in 2011. According to the statistics from the United States Bureau of Labor, approximately 14.3 million Americans were unemployed in 2009, 14.8 million in 2010, and 13.7 million in 2011. The national unemployment rate increased from 9.3% in 2009 to 9.6% in 2010 and then declined to 8.9% in 2011.

New Jersey unemployment rates roughly reflected that of the nation as statewide unemployment increased to 9.8% in 2010 and then fell to 9.5% in 2011 (an overall increase of 0.4% from 2009). The southern New Jersey job market continues to be hit slightly harder than the northern New Jersey job market in this recession. Unemployment in the Pinelands reached 10.8% in 2010, but then declined to 10.6% in 2011 (an overall increase of 0.73% from 2009). The Non-Pinelands experienced a similar, but slightly lower, increase in unemployment during the two years (+0.71%), finishing with an average rate of 10.8% for 2011.

For the five-year period between 2007 and 2011, 14 Pinelands municipalities had increases in unemployment up to 5%; 33 had increases in unemployment between 5% and 10%. Two municipalities that straddle the Pinelands boundary but have less than 10% land area in the Pinelands Area saw increases of up to 5% while the other four had increases between 5% and 7%. The two greatest increases in unemployment from 2007 to 2011 occurred in Egg Harbor City (10%) and South Toms River Borough (9.2%) while the smallest increases were in Upper Township (1.9%) and Medford Lakes Borough (2.5%).

Figure E2a

Unemployment Rate – 2010

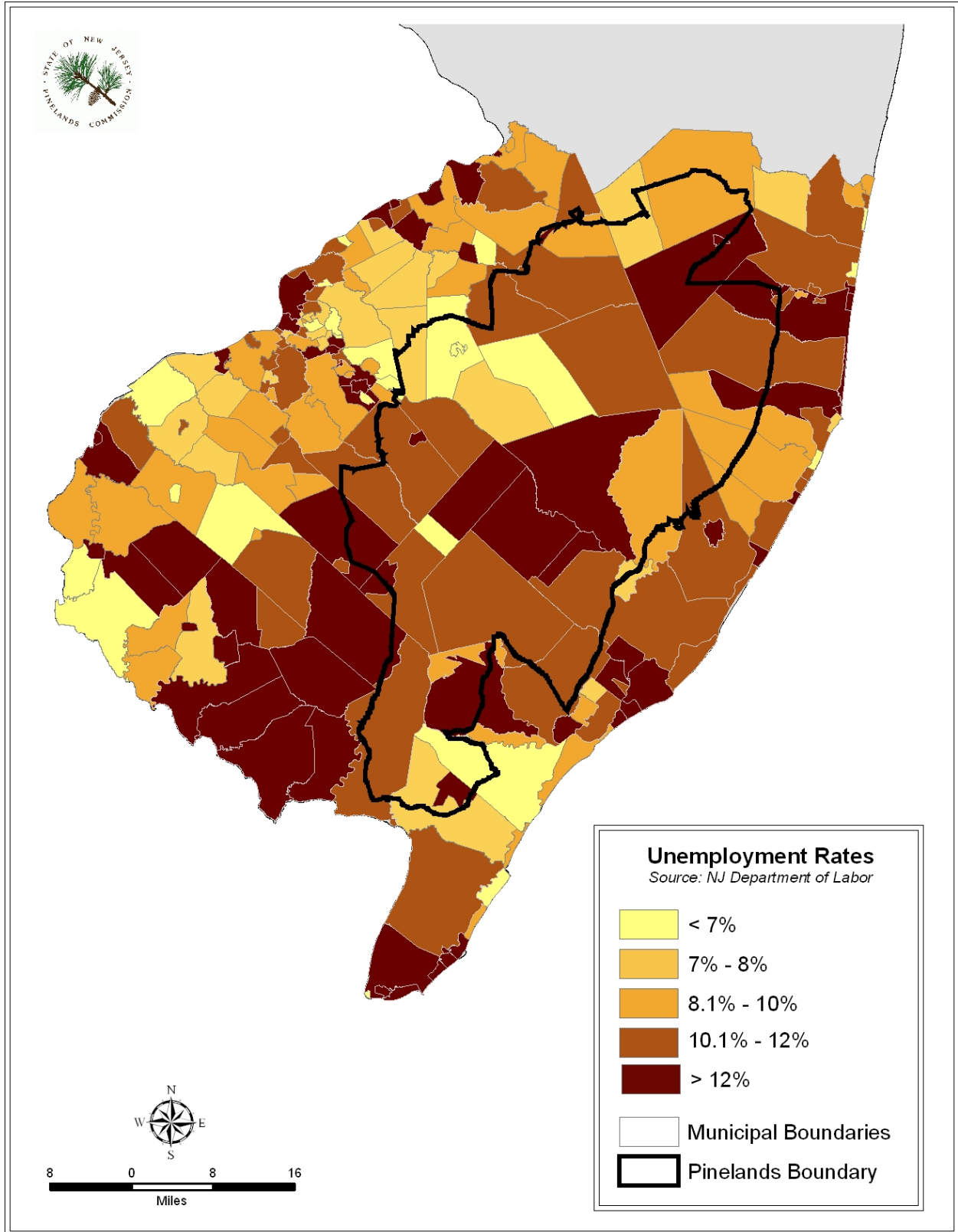


Figure E2b

Unemployment Rate – 2011

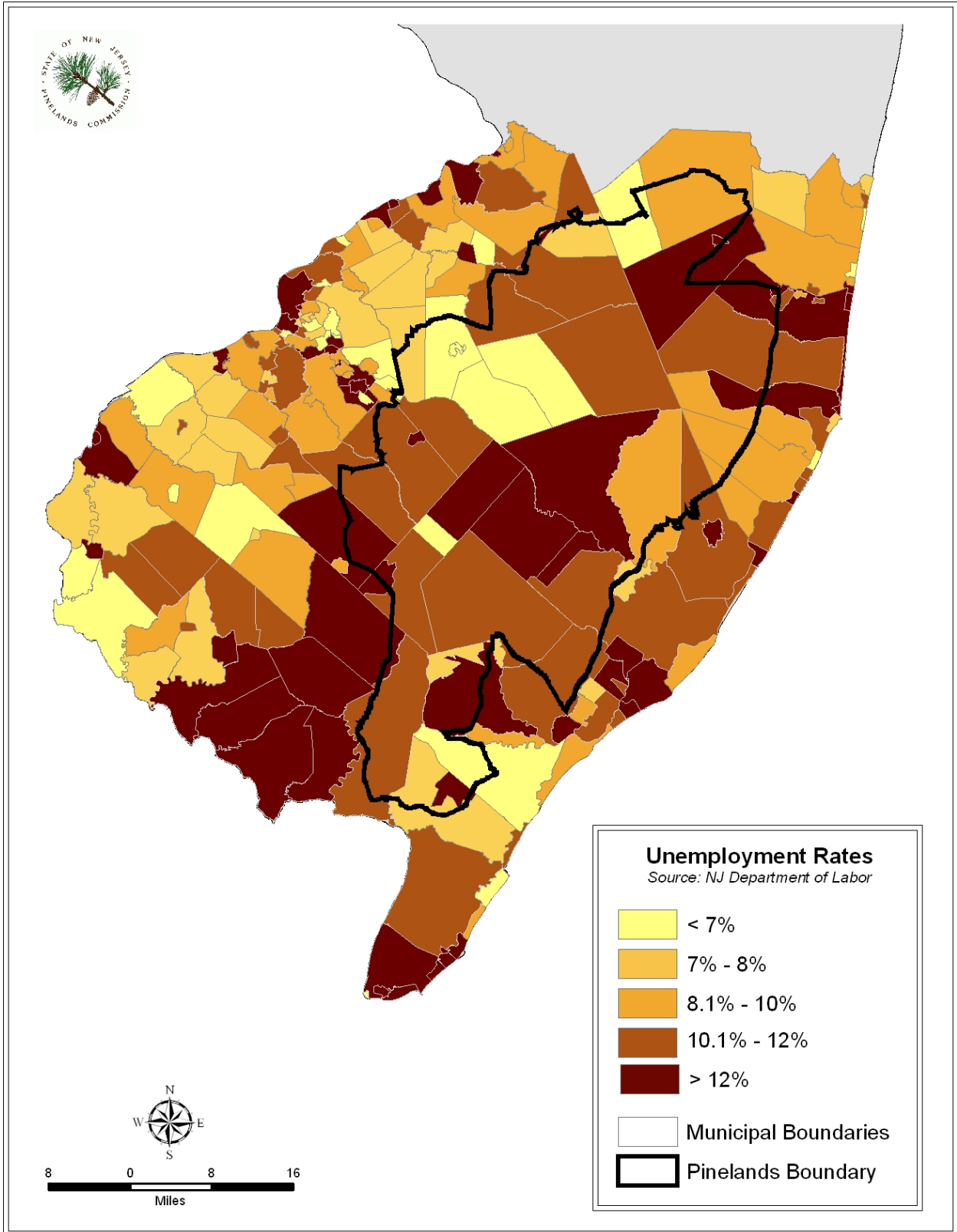


Figure E2c

Unemployment Rate Change – 2006 to 2011

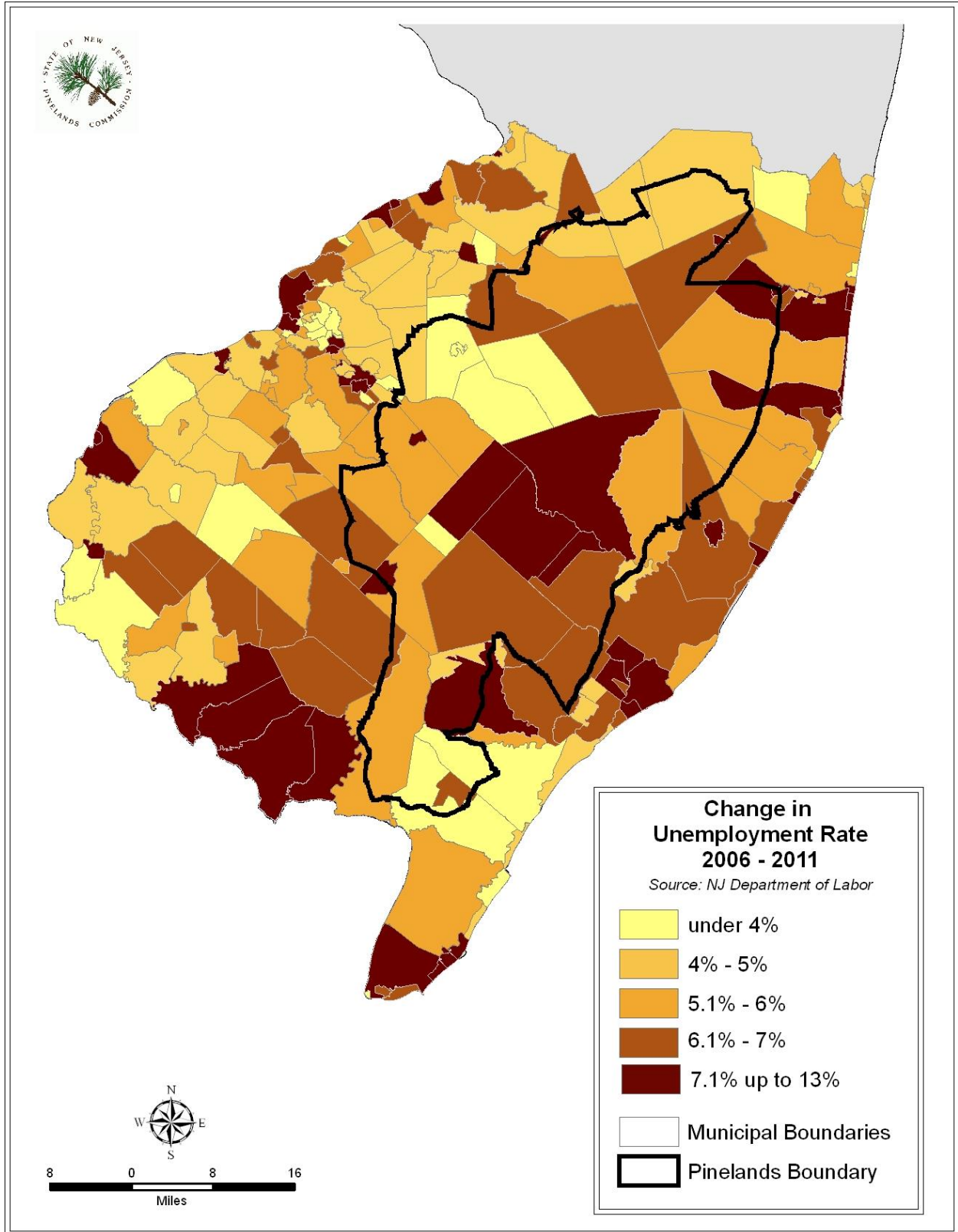
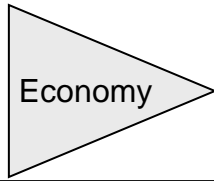


Table E2

Unemployment

(Sorted by 2011 Unemployment Rates)

| Municipality | County | 2007 | 2008 | 2009 | 2010 | 2011 | 5 Year Change |
|---|------------|------|-------|-------|-------|-------|---------------|
| Egg Harbor City | Atlantic | 9.1% | 10.9% | 18.0% | 19.4% | 19.0% | 10.0% |
| South Toms River Borough | Ocean | 7.6% | 9.7% | 15.0% | 17.2% | 16.8% | 9.2% |
| Hammonton Town | Atlantic | 7.6% | 9.1% | 15.2% | 16.5% | 16.2% | 8.6% |
| Chesilhurst Borough | Camden | 7.5% | 9.1% | 14.8% | 16.1% | 15.6% | 8.1% |
| Berkeley Township | Ocean | 6.8% | 8.8% | 13.7% | 14.6% | 14.9% | 8.1% |
| Lakehurst Borough | Ocean | 6.5% | 8.4% | 13.0% | 14.9% | 14.6% | 8.1% |
| Buena Borough | Atlantic | 6.7% | 8.1% | 13.7% | 14.8% | 14.5% | 7.8% |
| Washington Township | Burlington | 6.1% | 13.1% | 13.1% | 14.2% | 13.8% | 7.7% |
| Estell Manor City | Atlantic | 6.6% | 8.0% | 13.4% | 14.5% | 14.2% | 7.7% |
| Ocean Township | Ocean | 5.8% | 7.5% | 11.6% | 13.4% | 13.1% | 7.3% |
| Wrightstown Borough | Burlington | 5.8% | 12.4% | 12.4% | 13.5% | 13.0% | 7.3% |
| Mullica Township | Atlantic | 6.0% | 7.2% | 12.2% | 13.3% | 13.0% | 7.0% |
| Manchester Township | Ocean | 7.2% | 8.9% | 13.5% | 14.4% | 14.2% | 7.0% |
| Hamilton Township | Atlantic | 5.0% | 6.1% | 10.4% | 11.7% | 11.9% | 6.9% |
| Franklin Township | Gloucester | 5.6% | 6.9% | 11.6% | 12.9% | 12.4% | 6.8% |
| Galloway Township | Atlantic | 4.9% | 6.0% | 10.4% | 11.1% | 11.5% | 6.6% |
| Little Egg Harbor Township | Ocean | 5.1% | 6.6% | 10.3% | 11.9% | 11.7% | 6.6% |
| Egg Harbor Township | Atlantic | 5.1% | 6.2% | 10.6% | 11.2% | 11.6% | 6.5% |
| Southampton Township | Burlington | 5.0% | 10.9% | 10.9% | 11.9% | 11.5% | 6.5% |
| Beachwood Borough | Ocean | 4.7% | 6.1% | 9.5% | 11.0% | 10.7% | 6.1% |
| Woodbine Borough | Cape May | 6.9% | 8.4% | 11.5% | 12.7% | 12.9% | 6.1% |
| Woodland Township | Burlington | 4.7% | 10.1% | 10.1% | 11.0% | 10.7% | 6.0% |
| Buena Vista Township | Atlantic | 4.8% | 5.9% | 10.0% | 10.9% | 10.7% | 5.9% |
| Maurice River Township | Cumberland | 4.3% | 5.2% | 8.0% | 10.2% | 10.1% | 5.8% |
| Winslow Township | Camden | 5.1% | 6.2% | 10.3% | 11.3% | 10.8% | 5.7% |
| Pemberton Township | Burlington | 5.3% | 10.3% | 10.3% | 11.3% | 10.9% | 5.6% |
| Lacey Township | Ocean | 4.6% | 6.2% | 9.9% | 10.3% | 10.1% | 5.5% |
| Waterford Township | Camden | 4.6% | 5.7% | 9.5% | 10.4% | 10.0% | 5.4% |
| Barnegat Township | Ocean | 4.1% | 5.3% | 8.4% | 9.7% | 9.5% | 5.4% |
| Monroe Township | Gloucester | 5.0% | 6.2% | 10.4% | 10.9% | 10.3% | 5.3% |
| Stafford Township | Ocean | 4.1% | 5.5% | 8.5% | 9.7% | 9.4% | 5.3% |
| Eagleswood Township | Ocean | 4.0% | 5.2% | 8.2% | 9.5% | 9.3% | 5.3% |
| Bass River Township | Burlington | 3.9% | 8.5% | 8.5% | 9.3% | 9.0% | 5.1% |
| Jackson Township | Ocean | 4.1% | 5.4% | 8.9% | 9.3% | 9.0% | 4.9% |
| New Hanover Township | Burlington | 3.4% | 7.5% | 7.5% | 8.2% | 7.9% | 4.5% |
| Weymouth Township | Atlantic | 3.5% | 4.3% | 7.5% | 8.1% | 8.0% | 4.4% |
| Evesham Township | Burlington | 2.9% | 6.8% | 6.8% | 7.2% | 7.3% | 4.4% |
| Port Republic City | Atlantic | 3.4% | 4.2% | 7.2% | 7.9% | 7.7% | 4.3% |
| Plumsted Township | Ocean | 3.0% | 3.9% | 6.2% | 7.2% | 7.0% | 4.0% |
| Shamong Township | Burlington | 2.9% | 6.4% | 6.4% | 7.1% | 6.8% | 3.9% |
| Dennis Township | Cape May | 3.9% | 4.8% | 6.7% | 7.4% | 7.6% | 3.7% |
| Folsom Borough | Atlantic | 2.7% | 3.3% | 5.7% | 6.3% | 6.1% | 3.4% |
| Berlin Township | Camden | 2.8% | 3.5% | 5.9% | 6.4% | 6.2% | 3.4% |
| Medford Township | Burlington | 2.3% | 5.2% | 5.2% | 5.7% | 5.5% | 3.2% |
| Tabernacle Township | Burlington | 2.1% | 4.7% | 4.7% | 5.2% | 5.0% | 2.9% |
| Medford Lakes Borough | Burlington | 1.8% | 4.0% | 4.0% | 4.4% | 4.2% | 2.5% |
| Upper Township | Cape May | 2.0% | 2.4% | 3.4% | 3.8% | 3.9% | 1.9% |
| <i>Outside Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | |
| Vineland City | Cumberland | 6.5% | 8.2% | 12.4% | 13.3% | 13.3% | 6.8% |
| North Hanover Township | Burlington | 4.8% | 10.5% | 10.5% | 11.5% | 11.1% | 6.3% |
| Toms River Township | Ocean | 4.3% | 5.6% | 9.1% | 10.2% | 9.9% | 5.6% |
| Corbin City | Atlantic | 4.2% | 5.1% | 8.9% | 9.6% | 9.4% | 5.2% |
| Springfield Township | Burlington | 3.7% | 8.1% | 8.1% | 8.8% | 8.5% | 4.9% |
| Berlin Borough | Camden | 3.9% | 4.9% | 8.1% | 8.9% | 8.6% | 4.6% |



3

Employment, Establishments, Wages

New Jersey Department of Labor 1980 - 2010

X Updated

- From 2006 to 2010, employment and the number of establishments have declined at similar rates in all regions, but wages decreased less in the Pinelands than elsewhere.

| NAICS* | Time Period | Largest Employment Sector | 2 nd Largest Sector | 3 rd Largest Sector |
|------------|-------------|------------------------------------|------------------------------------|------------------------------------|
| Atlantic | 2005-2010 | Leisure/Hospitality (↓) | Trade/Transportation/Utilities (↓) | Education/Health Services (↑) |
| Burlington | 2004-2009 | Trade/Transportation/Utilities (↓) | Professional/Business Services (↑) | Education/Health Services (↑) |
| Camden | 2004-2009 | Trade/Transportation/Utilities (↓) | Education/Health Services (↑) | Professional/Business Services (↓) |
| Cape May | 2004-2009 | Leisure/Hospitality (↓) | Trade/Transportation/Utilities (↓) | Education/Health Services (↑) |
| Cumberland | 2004-2009 | Trade/Transportation/Utilities (↓) | Manufacturing (↓) | Education/Health Services (↑) |
| Gloucester | 2004-2009 | Trade/Transportation/Utilities (↓) | Education/Health Services (↑) | Manufacturing (↓) |
| Ocean | 2005-2010 | Trade/Transportation/Utilities (↓) | Education/Health Services (↑) | Leisure/Hospitality (↑) |
| Salem | 2004-2009 | Trade/Transportation/Utilities (↓) | Manufacturing (↓) | Education/Health Services (↓) |

* For an in-depth analysis of the various sectors by county, please visit http://lwd.dol.state.nj.us/labor/lpa/pub/factbook/factbook_index.html

Description: These three variables collectively describe the composition, size, strength, and location of the job market. The first variable, *employment*, is a basic measure of economic health. Employment data count the number of jobs tracked by unemployment insurance coverage.¹³ The data are broken down to the first Standard Industrial Classification (SIC) code level (major industry division) to track the shifting of activity between major economic components. The second variable, *number of establishments*, refers to the number of businesses that have employees and is presented at the single-digit SIC code level. The third variable, *wages*, is a measure of economic activity that complements employment and number of establishments. In 2001 the state began using the new North American Industrial Classification System (NAICS) and discontinued the use of SIC codes. NAICS data is broken down to the two-digit level for post-2000 data.

Unit of Analysis: Municipal-level data is available for all three variables from the period 1993 to 1999. No municipal data is available for the years 2000 to 2002, but the New Jersey Department of Labor once again began collecting that data for 2003. The municipal-level data previously collected is presented here along with the new data for 2003. It must be emphasized that there are limitations to municipal data due to disclosure regulations.¹⁴ Therefore, the Pinelands and the Non-Pinelands aggregates are approximations, not exact counts. The New Jersey Department of Labor is under contract to produce county level data each year, so county level data is included as well. County-level data is subjected to the same limitations, but to a lesser degree. Municipal data is not comparable to the county data due to the effects of data suppression (i.e. the sum of the municipal parts does not equal the county whole).

Summary of Previous Findings

Employment

The Pinelands region outpaced the Non-Pinelands region and the state for growth in employment from 1993 to 1998. Employment in the Pinelands grew by 16.2% during that period, compared to 10% for the state and 9.2% for the Non-Pinelands region. The largest sectors of employment in the Pinelands are retail, health care, and construction, whereas the largest sectors for the state and the Non-Pinelands region are services, retail, and manufacturing. While service employment is greater than retail employment in the Pinelands, employment in the Pinelands is weighted more toward the retail sector and less toward the

¹³ Because government employment is not included in all data sets, any such data have been omitted to facilitate comparisons over the entire monitoring period. Federal, state, local, and postal service jobs are therefore not represented in the data shown. This exclusion is in addition to the types of employment not tracked by the New Jersey Department of Labor, which includes “self-employed and unpaid family workers or certain agricultural and in-home domestic workers.” As used in this report, the term “employment” refers to the modified private employment figures.

¹⁴ The information derived in this analysis was obtained from the records of the Covered Employment system, which does not release data in cases where it has the possibility of providing information about a single employer or employment location. Data are “suppressed” when the system contains information on three or fewer employers, or when one employer represents 80% or more of the market. While it is unlikely that data suppression has had a large effect at the county level, it is likely to affect data at the municipal level, especially when the data are further broken down by industrial sector.

service sector compared to the state and the Non-Pinelands region. Employment shifts between different sectors was minimal in the Pinelands during the course of the monitoring period.

While employment was generally flat in the state as a whole and in the Non-Pinelands region from 1998 to 2003, the Pinelands region continued to post impressive job numbers. For the five-year period, employment increased 15.3% in the Pinelands; in contrast, the Non-Pinelands job market increased only 1.7% and the state increased only 3.3% over the same time frame. Since 1993, job growth in the Pinelands has grown at three times the rate of the Non-Pinelands and the rest of the state, adding almost 35,000 new jobs during that time (+34%).

Establishments

The Pinelands region outpaced both the state and the Non-Pinelands region for growth in new establishments from 1993 to 1998 by about a two-to-one margin. The Pinelands economy created 21.1% more establishments during the period, while the state grew 10.5% and the Non-Pinelands added 12.6% new businesses over the same time frame.

The sectors with the largest number of establishments are synonymous with the sectors of largest employment. Construction establishments comprise a larger percentage of total establishments in the Pinelands compared to the other regions. The percentage of total establishments in the agricultural sector is also larger in the Pinelands, while the percentages of service and retail sectors are fairly close between all three regions.

Growth in establishments slowed in all regions from 1998 to 2003 in comparison to 1993 to 1998. The Pinelands again fared better in this respect, however. From 1998 to 2003, the Pinelands added 1,000 new establishments, a gain of 9.2% since 1998. The Non-Pinelands region actually posted a slight decrease (-0.7%) in establishments, dropping from 42,952 in 1998 to 42,632 in 2003. As a whole, the state posted a 6.3% increase in new businesses from 1998 to 2003. During the past 10 years, the Pinelands have added more than 3,000 new establishments, which represent a gain of 32.3% over the 1993 level. That is twice the rate of growth of the state as a whole (+17.5%) and almost three times the rate of growth of the Non-Pinelands region (+11.8%).

Wages

Average annual wages declined by 2.7% statewide from 1993 to 1998. Southern New Jersey fared better in respect to wages over this time period, with wages in the Pinelands rising 2.9% and wages in the Non-Pinelands increasing 3.3%. Average annual wages in the Pinelands still lagged \$2,000 behind the Non-Pinelands by 1998, and trailed the state as a whole by almost \$13,000 annually. The highest paying sectors in the Pinelands in 1998 were wholesale, finance-insurance-real estate, and construction. The highest paying sectors in the state were finance-insurance-real estate, transportation-communications-utilities, and wholesale, and the highest paying sectors in the Non-Pinelands were manufacturing, wholesale, and construction. Agricultural wages are much higher in the Pinelands compared to the Non-Pinelands region, while manufacturing wages are much lower in the Pinelands compared to the Non-Pinelands.

Annual average wages climbed considerably in all three regions in the period between 1998 and 2003. After posting a real decrease of 2.7% in wages from 1993 to 1998, the state as a whole increased average annual wages 4.1% from 1998 to 2003. Southern New Jersey fared even better over the past five years, with the Pinelands region wages rising 4.4% and the Non-Pinelands posting a strong 6.1% increase in average annual wages. During the ten-year period of 1993 to 2003, southern New Jersey has fared very well in comparison to northern New Jersey in respect to wage growth. During that time, wages in the state as a whole grew very slightly by 1.3%. In contrast, the Non-Pinelands wages increased by 9.6%, and the Pinelands region increased by 7.4% during the same time frame.

With the exception of Folsom Borough, Medford Lakes Borough, and Evesham Township, all of the municipal economies at the highest end of the average wages scale are located to the west of the Pinelands. A number of these municipalities are logical extensions of the Philadelphia metropolitan economy. Within the Pinelands, four municipalities are of particular note. Jackson Township, Plumsted Township, Manchester Township, and Hamilton Township, while all posting large increases in population during the past 10 years, have relatively low annual wages for their local economies. Of those four, the Ocean County communities have served largely as residential communities. Hamilton Township, however, has had the largest increase in retail space in all of southern New Jersey in the past 10 years, but its average annual wages nonetheless have lagged behind the rest of the region.

In the 2004 Annual Report, updates were provided only at the county level since new municipal data had not been available since 1999. Though data has not been provided for the missing years of 2000 to 2002, the new municipal data released for 2003 allowed an analysis once again at the Pinelands versus the Non-Pinelands regional level.

| Region | 2006 Total Establishments | 2010 Total Establishments | 5 Year Change | 5 Year % Change |
|---------------|---------------------------|---------------------------|---------------|-----------------|
| New Jersey | 270,829 | 259,893 | -10,936 | -4.0% |
| Pinelands | 14,193 | 13,303 | -890 | -6.3% |
| Non-Pinelands | 44,822 | 42,730 | -2,092 | -4.7% |

| Region | 2006 Total Average Annual Employment | 2010 Total Average Annual Employment | 5 Year Change | 5 Year % Change |
|---------------|--------------------------------------|--------------------------------------|---------------|-----------------|
| New Jersey | 3,289,021 | 3,107,176 | -181,845 | -5.5% |
| Pinelands | 144,336 | 135,357 | -8,979 | -6.2% |
| Non-Pinelands | 627,538 | 585,047 | -42,491 | -6.8% |

| Region | 2006 Private Average Annual Wage | 2010 Private Average Annual Wage | 5 Year Change | 5 Year % Change |
|---------------|----------------------------------|----------------------------------|---------------|-----------------|
| New Jersey | \$45,782 | \$44,847 | -\$935 | -2.0% |
| Pinelands | \$37,294 | \$37,003 | -\$291 | -0.8% |
| Non-Pinelands | \$37,511 | \$36,558 | -\$953 | -2.5% |

Update¹⁵

Establishments

Establishment totals fell across the state from 2006 to 2010. The number of establishments in the Pinelands fell by 890 to 13,303; a 6.3% decrease. The Non-Pinelands and New Jersey fell by 4.7% and 4.0%, respectively. The changes within the Pinelands counties (including Salem County) during the five-year period were more variable: six of the eight counties saw a decrease in the number of establishments. Salem County's 1,345 establishments in 2006 fell by 9.7% through 2010 (the largest percentage decrease of the southern New Jersey counties), despite a 9.2% increase in establishments in 2010. Ocean County was posted gains during the five-year period; an increase of 3.4% to 12,000 establishments while Atlantic County added 20 new establishments (a 0.3% gain).

At the municipal level, 15 of the 50 municipalities with any amount of land in the Pinelands boundary showed gains in the number of establishments from 2006 to 2010 (only one of those 15 – Berlin Borough – have less than 10% of its land in the Pinelands Area). Jackson Township had the largest gains in both the number of establishments gained as well as percentage (245 and 41.7%, respectively). Barnegat Township added 49 establishments (a 24.3% increase); the second highest.

Among the 34 municipalities that lost establishments during the 2006 to 2010 monitoring period, 20 exceeded the Pinelands' average of -6.3%. Washington Township and Springfield Township lost the largest percentages at 51.1% and 50%, respectively, while the largest absolute losses occurred in Waterford Township (lost 226 establishments) and Upper Township (lost 155 establishments).

Employment

From 2006 to 2010, employment in the Pinelands, the Non-Pinelands, and New Jersey is declining. With 135,357 employees in 2010, employment in the Pinelands declined by 6.2% from 2006. Likewise, employment in the Non-Pinelands has decreased by 6.8% to 585,047 while the state did slightly better, falling only 5.5%. Camden County lost more private sector jobs than any other county in the Pinelands, posting a decrease of 15,080 jobs (8.7% since 2006). Atlantic County posted an 11.7% decrease; the highest percentage decrease of the Pinelands counties since 2006. One county was able to post five-year increases, however, with Salem County gaining 508 jobs (a 3.3% increase). Salem also had the largest one-year percentage increase from 2009 to 2010 at 22.4%; the next highest increase in 2010 is Ocean County at 0.4% while the rest of the counties lost jobs.

At the municipal level, Jackson Township posted the largest gain of 1,326 jobs from 2006 (18.6%). Twelve others posted gains, with four total Pinelands municipalities showing at least 10% job growth: Jackson Township, Manchester Township, Tabernacle Township, and South Toms River Borough.

¹⁵ Note: Bass River Township, Chesilhurst Borough, and Medford Lakes Township, have been omitted from analysis due to incomplete data.

The Pinelands municipalities mostly experienced negative job growth, as 32 of the 44 municipalities with at least 10% of their land in the Pinelands boundary posted lost jobs. Of those, 24 municipalities posted more percentage loss than the -6.2% average for the Pinelands. Washington Township was hit the hardest, losing 72.6% of its jobs in 2006 (an absolute loss of 189). Of the Pinelands municipalities, Waterford Township posted the largest absolute loss at 1,545 jobs (44.3%). Of those municipalities with less than 10% of their total land area in the Pinelands Area, Toms River Township lost 3,700 jobs (-10.5%) and Vineland City lost 1,849 jobs (-7.0%).

Wages

Annual average wages decreased in all three regions in the period between 2006 and 2010. Wages were generally decreasing in the state as a whole by 2% and in the Non-Pinelands by -2.5% from 2006 to 2010. However, at -0.8%, the Pinelands decrease was less. The Pinelands boasted a higher average annual wage than the Non-Pinelands in 2010 (\$37,003 versus \$36,558). This is much lower than the state's \$44,847 average annual wage. However, this was not the case five years prior when the Non-Pinelands wage edged that of the Pinelands by approximately \$500. Wages decreased in five counties (ranging from -0.9% in Atlantic County to -5.5% in Gloucester County). In contrast, wages increased in Burlington County by 2.0% and in Salem County by 7.6% to five-year highs of \$41,575 and \$44,261, respectively:

Nineteen of the 50 municipalities with any amount of land in the Pinelands Area showed a decrease in average annual wages. Of those 19 municipalities, 13 had changes of greater than -2%. Corbin City experienced the largest absolute and percentage decrease at \$4,596 and 19.8%, respectively. Maurice River Township (-\$3,818; -12.3%) and Ocean Township (-\$3,172; -10.9%) showed the largest decreases among municipalities with at least 10% of their total land area in the Pinelands boundary.

Conversely, 31 municipalities enjoyed an overall increase in average annual wages; only four of which was less than 2%. Ten municipalities increased between 10% and 20%, while three increased by at least 24%. Springfield Township saw a 24.4% increase to an average annual wage of \$48,833, and Folsom Borough increased by 42.6% to \$69,816.

Figure E3

Average Annual Private Sector Wages - 2010

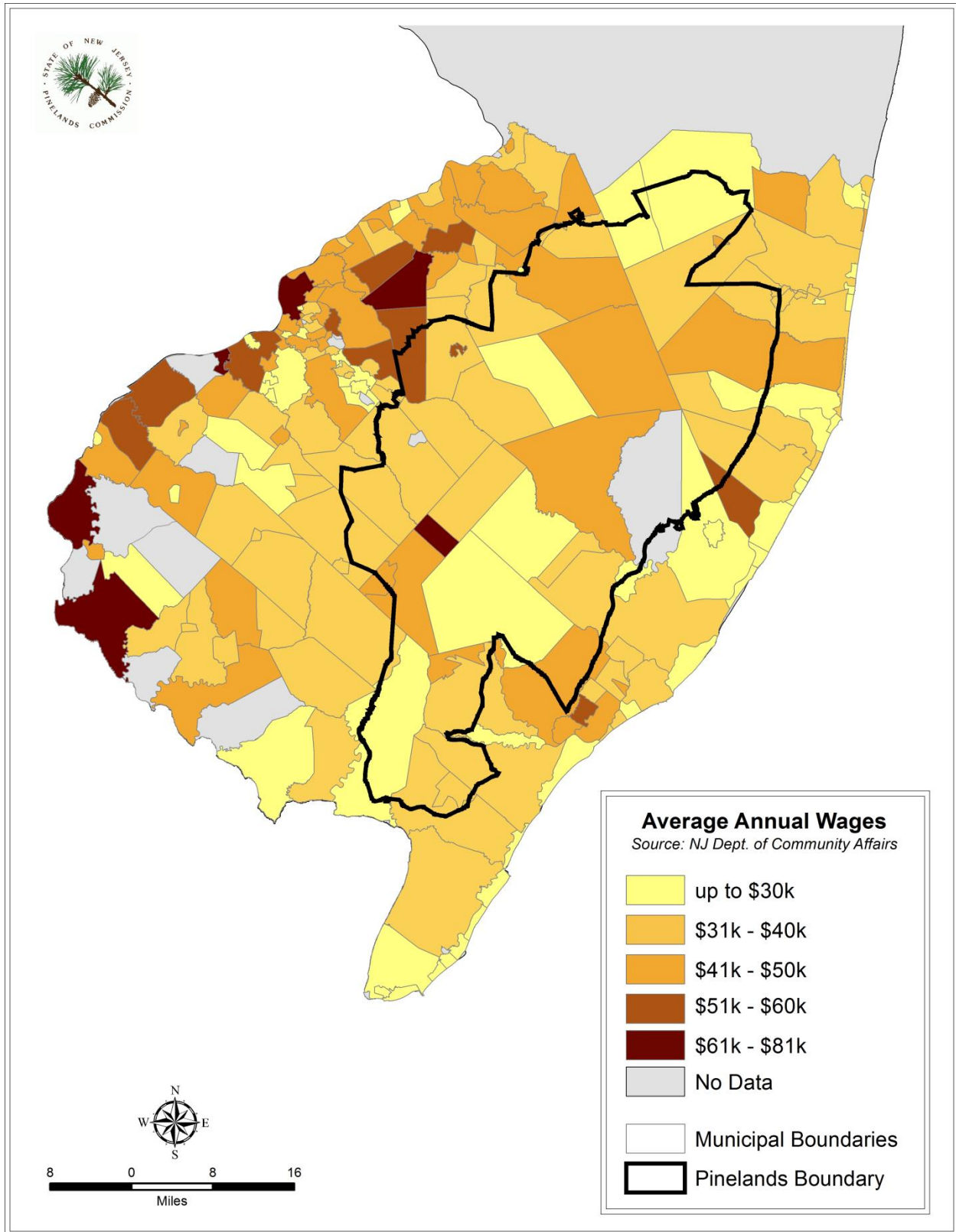


Table E3a**County Private Sector Establishments**

| County | 2006 | 2007 | 2008 | 2009 | 2010 | 5 Year Change |
|-------------------|--------|--------|--------|--------|--------|---------------|
| Atlantic County | 6,604 | 6,767 | 6,772 | 6,640 | 6,624 | 20 |
| Burlington County | 10,855 | 10,836 | 10,836 | 10,709 | 10,817 | -38 |
| Camden County | 13,052 | 12,608 | 12,598 | 12,341 | 12,316 | -736 |
| Cape May County | 4,164 | 4,003 | 3,942 | 3,907 | 3,877 | -287 |
| Cumberland County | 3,397 | 3,261 | 3,120 | 3,182 | 3,178 | -219 |
| Gloucester County | 6,156 | 6,064 | 5,995 | 5,945 | 6,006 | -150 |
| Ocean County | 11,603 | 12,070 | 12,111 | 11,861 | 12,000 | 397 |
| Salem County | 1,345 | 1,314 | 1,196 | 1,113 | 1,215 | -130 |

Table E3b**County Private Sector Employment**

| County | 2006 | 2007 | 2008 | 2009 | 2010 | 5 Year Change |
|-------------------|---------|---------|---------|---------|---------|---------------|
| Atlantic County | 126,505 | 125,118 | 122,498 | 113,919 | 111,749 | -14,756 |
| Burlington County | 167,846 | 168,560 | 166,346 | 163,625 | 161,307 | -6,539 |
| Camden County | 172,854 | 171,727 | 170,339 | 160,011 | 157,774 | -15,080 |
| Cape May County | 33,035 | 32,622 | 32,045 | 31,342 | 31,120 | -1,915 |
| Cumberland County | 46,809 | 46,421 | 45,392 | 44,754 | 44,302 | -2,507 |
| Gloucester County | 86,458 | 86,176 | 83,475 | 80,186 | 78,750 | -7,708 |
| Ocean County | 122,924 | 123,532 | 123,241 | 118,998 | 119,451 | -3,473 |
| Salem County | 15,443 | 15,712 | 13,986 | 13,034 | 15,951 | 508 |

Table E3c**County Private Sector Average Annual Wages
(Adjusted to 2010 Dollars)**

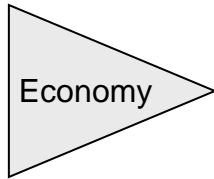
| County | 2006 | 2007 | 2008 | 2009 | 2010 | 5 Year Change |
|-------------------|----------|----------|----------|----------|----------|---------------|
| Atlantic County | \$36,817 | \$36,835 | \$36,580 | \$36,581 | \$36,478 | -\$340 |
| Burlington County | \$40,748 | \$41,118 | \$40,291 | \$40,412 | \$41,575 | \$827 |
| Camden County | \$39,027 | \$38,376 | \$38,134 | \$37,418 | \$37,018 | -\$2,009 |
| Cape May County | \$29,669 | \$29,163 | \$29,209 | \$28,083 | \$28,166 | -\$1,503 |
| Cumberland County | \$36,212 | \$34,385 | \$35,121 | \$35,432 | \$34,352 | -\$1,860 |
| Gloucester County | \$40,694 | \$40,244 | \$39,847 | \$39,361 | \$38,448 | -\$2,245 |
| Ocean County | \$32,775 | \$32,713 | \$31,119 | \$31,492 | \$31,298 | -\$1,477 |
| Salem County | \$41,128 | \$37,592 | \$36,029 | \$37,134 | \$44,261 | \$3,133 |

Table E3d 2003 County Private Sector Employment by NAICS Sector

| Sector | NAICS Description | Atlantic | Burlington | Camden | Cape May | Cumberland | Gloucester | Ocean | Salem | S. New Jersey |
|--------|--------------------------------------|----------------|----------------|----------------|---------------|---------------|---------------|----------------|---------------|----------------|
| 11 | Agriculture/Forestry/Fishing/Hunting | 1,349 | 532 | 127 | 172 | 1,347 | 737 | 58 | 473 | 4,795 |
| 21 | Mining | | | | | | | | | 0 |
| 22 | Utilities | 192 | | 81 | | | | 260 | | 533 |
| 23 | Construction | 6,272 | 7,185 | 9,482 | 2,434 | 2,475 | 5,796 | 8,318 | 929 | 42,891 |
| 31-33 | Manufacturing | 3,689 | 17,967 | 16,187 | 873 | 9,761 | 8,935 | 5,864 | 2,343 | 65,619 |
| 42 | Wholesale Trade | 2,123 | 10,048 | 10,993 | 458 | 2,011 | 7,711 | 3,290 | 198 | 36,832 |
| 44-45 | Retail Trade | 15,208 | 28,227 | 24,013 | 6,617 | 7,209 | 16,465 | 26,630 | 2,356 | 126,725 |
| 48-49 | Transportation and Warehousing | 2,075 | 3,709 | 4,260 | 282 | 1,620 | 1,519 | 1,912 | 637 | 16,014 |
| 51 | Information | 621 | 2,777 | 3,304 | 167 | 863 | 575 | 1,252 | 21 | 9,580 |
| 52 | Finance and Insurance | 2,322 | 16,322 | 7,246 | 1,038 | 1,151 | 1,783 | 4,281 | 493 | 34,636 |
| 53 | Real Estate and Rental and Leasing | 1,497 | 3,271 | 2,710 | 895 | 581 | 927 | 2,154 | 118 | 12,153 |
| 54 | Professional and Technical Services | 4,412 | 9,671 | 14,001 | 1,098 | 1,107 | 2,894 | 5,576 | 313 | 39,072 |
| 55 | Management of Co. and Enterprises | . | 329 | 42 | | | | 112 | | 483 |
| 56 | Administrative and Waste Services | 4,047 | 10,957 | 11,552 | 931 | 1,192 | 4,987 | 4,071 | 664 | 38,401 |
| 61 | Educational Services | 622 | 704 | 1,214 | 180 | 313 | 266 | 2,139 | | 5,438 |
| 62 | Health Care and Social Assistance | 14,362 | 19,354 | 29,823 | 3,836 | 7,326 | 9,962 | 25,156 | 2,666 | 112,485 |
| 71 | Arts, Entertainment, and Recreation | 1,527 | 1,506 | 1,793 | 1,059 | 447 | 900 | 3,434 | | 10,666 |
| 72 | Accommodation and Food Services | 51,346 | 11,664 | 12,087 | 8,376 | 2,808 | 7,056 | 11,213 | 1,412 | 105,962 |
| 81 | Other Services, Except Public Admin | 3,109 | 6,007 | 6,953 | 1,316 | 1,313 | 2,898 | 4,756 | 362 | 26,714 |
| 99 | Unclassified Entities | 17 | 111 | 1,018 | 101 | 110 | 71 | 466 | 63 | 1,957 |
| | Private Sector Total | 122,184 | 164,589 | 169,238 | 32,163 | 45,348 | 79,463 | 116,338 | 18,390 | 747,713 |

Table E3e 2003 County Private Sector Employment as a % of Total Employment

| Sector | NAICS Description | Atlantic | Burlington | Camden | Cape May | Cumberland | Gloucester | Ocean | Salem | S. New Jersey |
|--------|--------------------------------------|----------|------------|--------|----------|------------|------------|-------|-------|---------------|
| 11 | Agriculture/Forestry/Fishing/Hunting | 1.1% | 0.3% | 0.1% | 0.5% | 3.0% | 0.9% | 0.0% | 2.6% | 0.6% |
| 21 | Mining | | | | | | | | | 0.0% |
| 22 | Utilities | 0.2% | | 0.0% | | | | 0.2% | | 0.1% |
| 23 | Construction | 5.1% | 4.4% | 5.6% | 7.6% | 5.5% | 7.3% | 7.1% | 5.1% | 5.7% |
| 31-33 | Manufacturing | 3.0% | 10.9% | 9.6% | 2.7% | 21.5% | 11.2% | 5.0% | 12.7% | 8.8% |
| 42 | Wholesale Trade | 1.7% | 6.1% | 6.5% | 1.4% | 4.4% | 9.7% | 2.8% | 1.1% | 4.9% |
| 44-45 | Retail Trade | 12.4% | 17.1% | 14.2% | 20.6% | 15.9% | 20.7% | 22.9% | 12.8% | 16.9% |
| 48-49 | Transportation and Warehousing | 1.7% | 2.3% | 2.5% | 0.9% | 3.6% | 1.9% | 1.6% | 3.5% | 2.1% |
| 51 | Information | 0.5% | 1.7% | 2.0% | 0.5% | 1.9% | 0.7% | 1.1% | 0.1% | 1.3% |
| 52 | Finance and Insurance | 1.9% | 9.9% | 4.3% | 3.2% | 2.5% | 2.2% | 3.7% | 2.7% | 4.6% |
| 53 | Real Estate and Rental and Leasing | 1.2% | 2.0% | 1.6% | 2.8% | 1.3% | 1.2% | 1.9% | 0.6% | 1.6% |
| 54 | Professional and Technical Services | 3.6% | 5.9% | 8.3% | 3.4% | 2.4% | 3.6% | 4.8% | 1.7% | 5.2% |
| 55 | Management of Co. and Enterprises | . | 0.2% | 0.0% | | | | 0.1% | | 0.1% |
| 56 | Administrative and Waste Services | 3.3% | 6.7% | 6.8% | 2.9% | 2.6% | 6.3% | 3.5% | 3.6% | 5.1% |
| 61 | Educational Services | 0.5% | 0.4% | 0.7% | 0.6% | 0.7% | 0.3% | 1.8% | | 0.7% |
| 62 | Health Care and Social Assistance | 11.8% | 11.8% | 17.6% | 11.9% | 16.2% | 12.5% | 21.6% | 14.5% | 15.0% |
| 71 | Arts, Entertainment, and Recreation | 1.2% | 0.9% | 1.1% | 3.3% | 1.0% | 1.1% | 3.0% | | 1.4% |
| 72 | Accommodation and Food Services | 42.0% | 7.1% | 7.1% | 26.0% | 6.2% | 8.9% | 9.6% | 7.7% | 14.2% |
| 81 | Other Services, Except Public Admin | 2.5% | 3.6% | 4.1% | 4.1% | 2.9% | 3.6% | 4.1% | 2.0% | 3.6% |
| 99 | Unclassified Entities | 0.0% | 0.1% | 0.6% | 0.3% | 0.2% | 0.1% | 0.4% | 0.3% | 0.3% |



4

Retail Sales/Establishments

U.S. Census of Retail Trade 1992, 1997, 2002, 2007

Updated

- From 1997 to 2007, per capita retail sales growth was much stronger in the Pinelands than in all other regions of the state.

Per Capita Retail Sales

| County | 1997 Per Capita Sales | 2002 Per Capita Sales | 2007 Per Capita Sales | 5 Year Change 2002 - 2007 | 10 Year Change 1997 - 2007 |
|-------------------------|-----------------------|-----------------------|-----------------------|---------------------------|----------------------------|
| Atlantic | \$13,782 | \$14,733 | \$16,368 | 11.1% | 18.8% |
| Burlington | \$13,661 | \$19,933 | \$15,724 | -21.1% | 15.1% |
| Camden | \$11,842 | \$10,806 | \$9,540 | -11.7% | -19.4% |
| Cape May | \$12,715 | \$15,666 | \$16,429 | 4.9% | 29.2% |
| Cumberland | \$11,275 | \$11,838 | \$12,455 | 5.2% | 10.5% |
| Gloucester | \$12,866 | \$14,550 | \$15,104 | 3.8% | 17.4% |
| Ocean | \$12,703 | \$12,400 | \$12,828 | 3.5% | 1.0% |
| Salem | \$7,971 | \$9,669 | \$10,113 | 4.6% | 26.9% |
| South New Jersey | \$12,853 | \$13,729 | \$14,407 | 4.9% | 12.1% |
| State | \$12,590 | \$14,003 | \$13,753 | -1.8% | 9.2% |
| Pinelands ¹⁶ | \$9,588 | \$11,577 | \$11,501 | -0.7% | 20.0% |
| Non-Pinelands | \$14,385 | \$14,407 | \$15,150 | 5.2% | 5.3% |

Description: The Census of Retail Trade is conducted every 5 years as part of the Economic Census. The Census Bureau began using a different industrial classification system in 1997, with the largest change being the removal of the eating and drinking establishment’s classification from the 1997 data. To adjust for this, sales for eating and drinking establishments were removed from the 1992 data. The resulting numbers are suitable for a rough comparison.¹⁷ Values are adjusted for inflation and shown in 2004 dollars, and sales are presented per capita, based on 1992, 1997, and 2002 population estimates.

Unit of Analysis: Retail sales data are obtained at the county level and aggregated to yield totals for the southern eight-county region and the entire State (see Appendix C for county acreages). Partial data for the Pinelands and the Non-Pinelands region are available as the Census also collects data at the “place” level, which includes the most populous municipalities (109 out of 202 municipalities are available, 28 in the Pinelands and 81 outside the Pinelands).

Summary of Previous Findings

Per capita retail sales rose in southern New Jersey between 1992 and 1997 with an increase of 20.3%. The change in sales was generally more significant in the more densely populated counties, while the southern counties experienced smaller increases. Per capita sales are higher for the state as a whole compared to southern New Jersey, but southern New Jersey sales have increased at a faster rate. Per capita retail sales for the 28 Pinelands municipalities increased by 23%, while sales for the 81 Non-Pinelands municipalities rose by 14.1%.

Statewide growth in per capita retail sales increased 6.8% from 1997 to 2002, which marked a slowdown from the 17.1% growth statewide for the period 1992 to 1997. Per capita retail sales in the Non-Pinelands portion of southern New Jersey were

¹⁶ The categories for the Pinelands and the Non-Pinelands represent the number of municipalities for which the data is available. Data is available for 28 of the 47 Pinelands municipalities, and 81 of the 155 Non-Pinelands municipalities.

¹⁷ Other noteworthy changes include the reclassification of pawn shops to the Finance and Insurance sector, and of bakeries to the Manufacturing sector, and the addition of Wholesale Trade establishments that have facilities which cater to the general public. The numbers in this report have not been adjusted to reflect these changes.

essentially unchanged from 1997 to 2002, rising only 0.2%. In contrast, the Pinelands communities followed their 23% gain in per capita retail sales from 1992 to 1997, with a 20.7% increase in the period from 1997 to 2002. A large portion of this sustained growth in per capita sales for the Pinelands occurred in Ocean County.

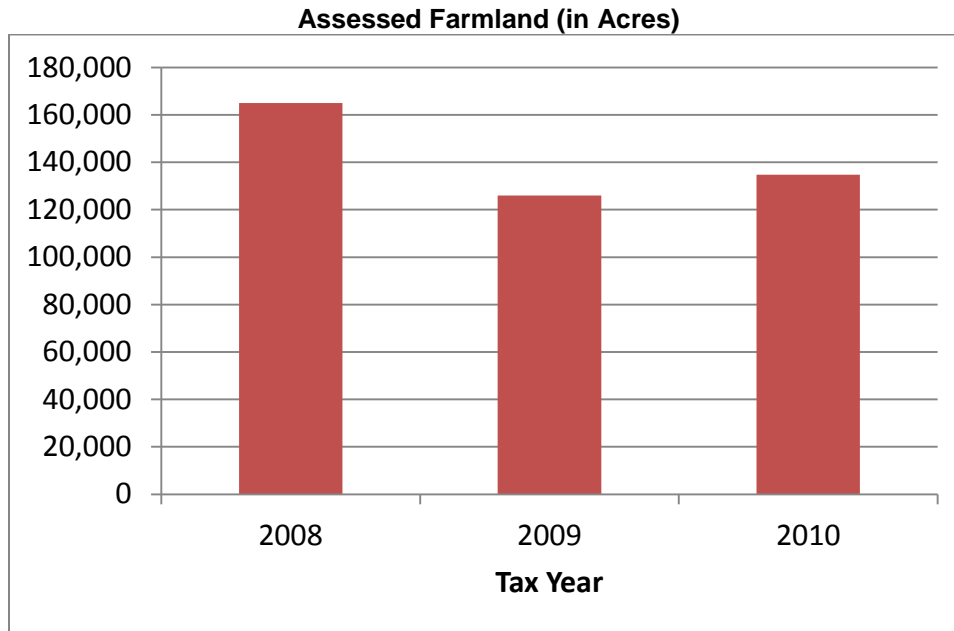
The concentration of retail establishments per resident continued to be about 50% higher in the Non-Pinelands than in the Pinelands in 2002. According to the New Jersey Department of Labor, in 2002, there were 1,598 retail establishments in the Pinelands (1 store for every 403 residents). In the Non-Pinelands, there were 6,273 retail establishments (1 store for every 268 residents). The pattern again appears to show higher concentrations of establishments in municipalities in the Pinelands that contain regional growth areas.

Update

The 2007 Census of Retail Trade shows the Pinelands region struggling to keep pace with the Non-Pinelands per capita retail sales following the growth during the period of 1992 to 2002. Statewide growth in per capita retail sales decreased 1.8% from 2002 to 2007, which marked a slowdown from the 6.8% growth statewide for the period 1997 to 2002. Per capita retail sales in the Non-Pinelands portion of southern New Jersey increased 5.2% from 2002 to 2007. In contrast, the Pinelands communities followed their 20.7% gain in per capita retail sales from 1997 to 2002, with a 0.7% decrease in the period from 2002 to 2007. From 2002 to 2007, the most drastic loss in per capita sales occurred in Burlington County (-21.1%), followed by Camden County (-11.7%). From 1997 to 2007, Camden County lost 19.4% in per capita retail sales, the single largest and only decline for any county in southern New Jersey.

Tracking the ten-year change of per capita retail across southern New Jersey, the Pinelands have the largest increase with 20% growth. The Non-Pinelands region has the smallest gains in retail during this same time with only 5.3% growth. The entire southern New Jersey region, during the same time, gained 12.1% in per capita retail sales, while the entire state gained 9.2%.

- Assessed acres in farmland continued to drop in the Pinelands in 2009, but increased in 2010. Data for areas outside of the Pinelands was unavailable.



Description: Agriculture is recognized in federal and state Pinelands legislation as an industry of special significance, and therefore receives a more detailed examination that uses three variables. The first variable, farmland assessed acreage, is compiled from FA-1 forms, which are completed by landowners and indicate acreage devoted to various crops and pasture as well as livestock. To qualify for farmland assessment, a landowner must have a minimum of five contiguous acres devoted to agricultural or horticultural use, and generate a minimum of \$500 in sales (plus an additional \$5 per acre for every acre of agricultural land beyond the first five acres or \$0.50 per acre for every acre of wood land beyond the first five acres).

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

Summary of Previous Findings

Assessed farmland acres were fairly stable in the Non-Pinelands portion of southern New Jersey from 1980 to 1995. Since 1995, development pressures have slowly eroded the farm base outside the Pinelands, and assessed acres in that region have decreased in nine of the 10 years from 1995 to 2005. In contrast, the Pinelands have shown a substantial increase in acreage devoted to agriculture since 1980. This growth was fueled by two periods that contributed significantly to farmland acres in the Pinelands: from 1980 to 1983, farm acreage increased 13.8% in the Pinelands, and from 1992 to 1996 acreage increased by 19.2%. During the entire period monitored, the Pinelands’ percentage of southern New Jersey farm acreage has increased from 33% in 1980 to 37% in 2008.

Burlington County has the largest amount of farm acreage in the Pinelands, while the overwhelming majority of Atlantic, Camden, and Ocean Counties’ assessed farmland fell inside the Pinelands. Much of the decrease in farm acres in the Non-Pinelands has been concentrated in Burlington, Camden, Cape May, and Gloucester counties.

After a 1.3% decrease in acres farmed in 2007, the Pinelands region experienced a slightly larger 2.0% decrease in acres farmed in 2008. For the year, there were 172,619 farmland acres in the Pinelands. The Non-Pinelands farmland acreage decreased for the ninth consecutive year in 2008, falling 0.4% to a total of 292,894 acres.

Update

Note: The Non-Pinlands farmland acreage is not available for this period. After a significant 23.6% decrease in acres farmed in 2009, the acres of farmland in the Pinelands increased 6.9% in 2010. For 2010, there were 134,750 farmland acres in the Pinelands. In 2010, 12 Pinelands municipalities gained acres in farmland, with Woodland Township posting an increase of 569.8% to 11,654 acres. Tabernacle Township posted the next largest increase (37.4%), bringing its total to 8,576. Thirteen Pinelands municipalities posted no change, and 22 lost farmland. The largest absolute loss in 2010 occurred in Pemberton Township, with 8,191 total acres (down 1,308 acres, -13.8%) and the largest percentage loss, at -34.3%, was Ocean Township, with a total of 752 acres (down 392 acres).

Figure E5

Farmland Assessed Acreage - 2010

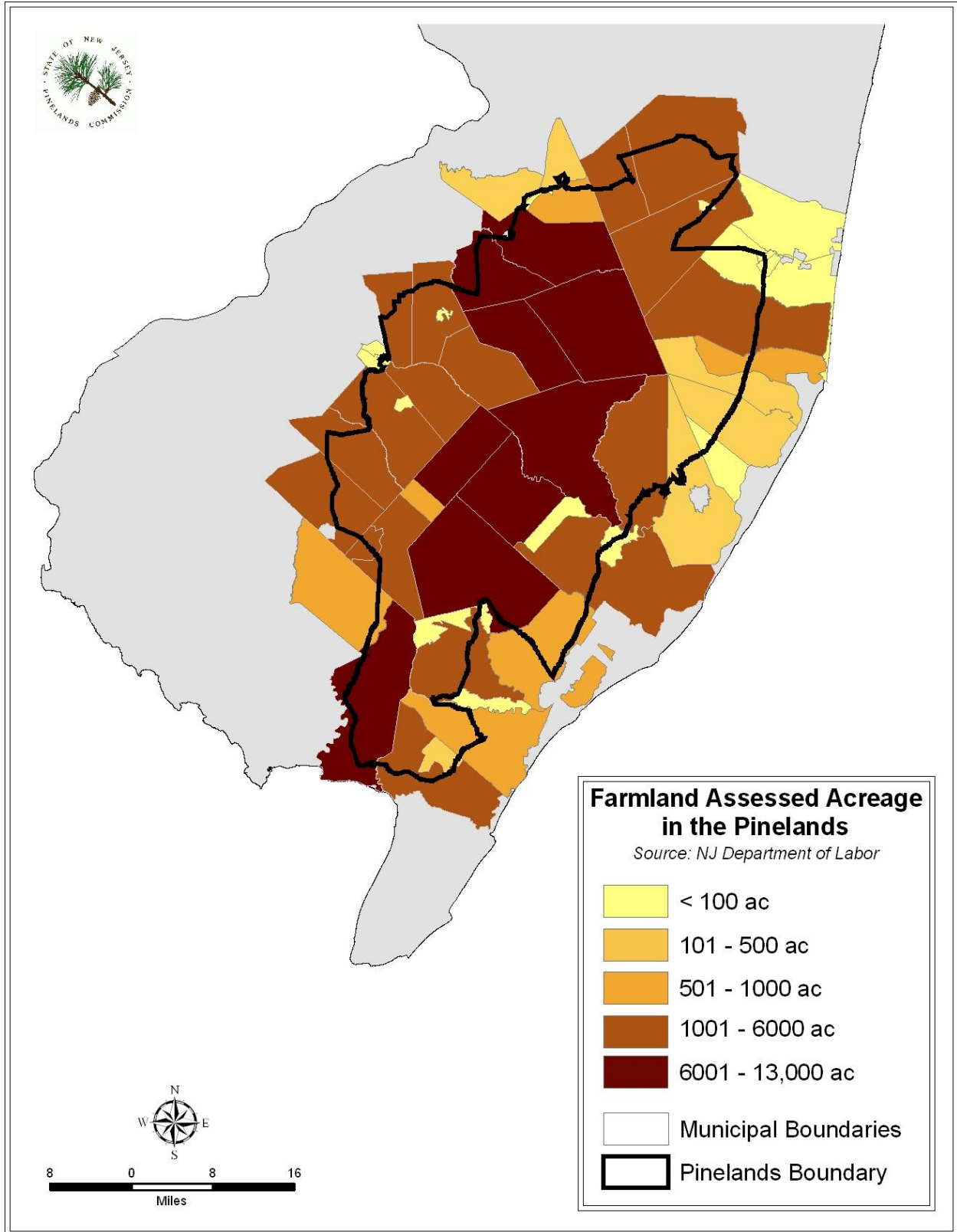


Table E5

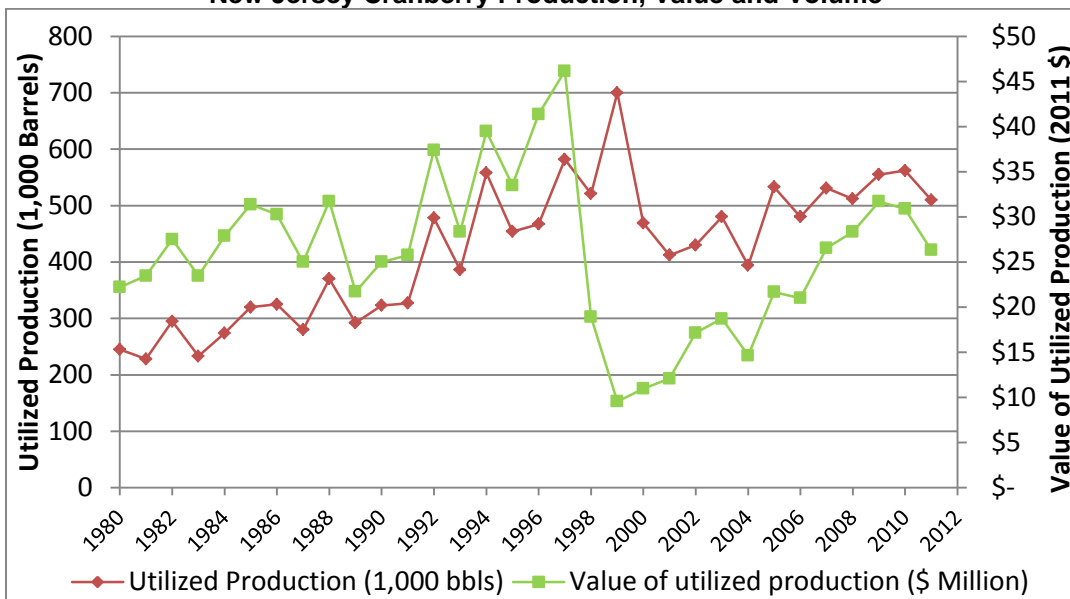
Farmland Assessed Acreage

(Sorted by the Change in Farmland Acreage from 2008 to 2010)

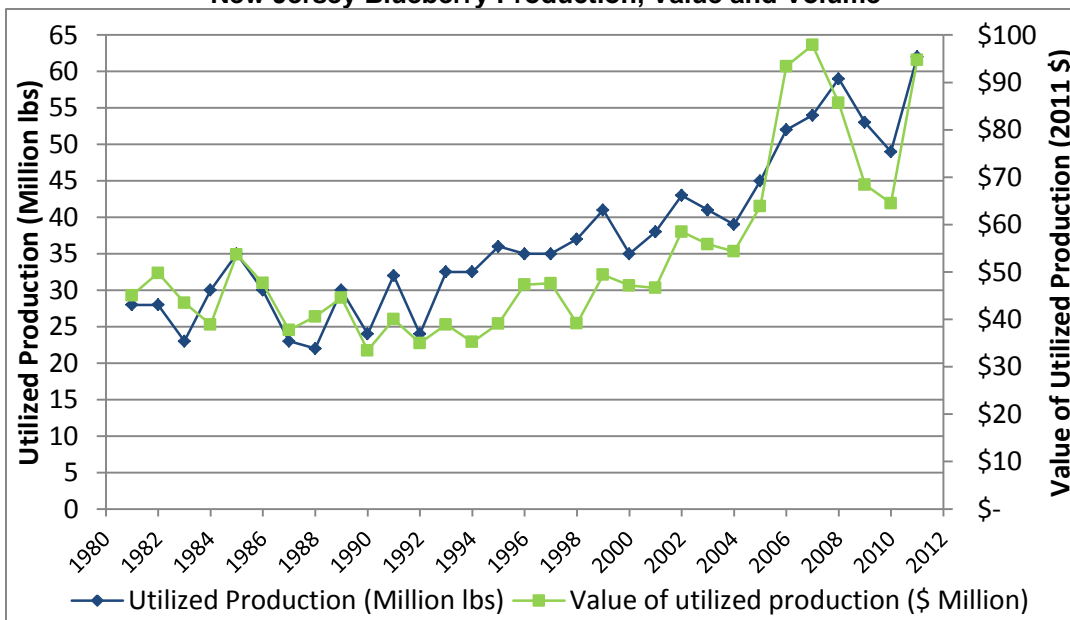
| Municipality | County | 2008 | 2009 | 2010 | Change 2008-2010 | Percent Change 2008-2010 |
|---|-------------------|-------|------|-------|---------------------|-----------------------------|
| Woodland Township | Burlington | 8038 | 1740 | 11654 | 3616 | 45.0% |
| Shamong Township | Burlington | 4664 | 4924 | 4745 | 81 | 1.7% |
| Buena Vista Township | Atlantic | 3484 | 3598 | 3521 | 37 | 1.1% |
| Mullica Township | Atlantic | 6392 | 6415 | 6422 | 30 | 0.5% |
| Egg Harbor City | Atlantic | 0 | 0 | 0 | 0 | 0.0% |
| Medford Lakes Borough | Burlington | 0 | 0 | 0 | 0 | 0.0% |
| Chesilhurst Borough | Camden | 0 | 0 | 0 | 0 | 0.0% |
| Beachwood Borough | Ocean | 0 | 0 | 0 | 0 | 0.0% |
| Lakehurst Borough | Ocean | 0 | 0 | 0 | 0 | 0.0% |
| South Toms River Borough | Ocean | 0 | 0 | 0 | 0 | 0.0% |
| Wrightstown Borough | Burlington | 20 | 17 | 17 | -3 | -15.0% |
| Hammonton Town | Atlantic | 6801 | 6767 | 6793 | -8 | -0.1% |
| Barnegat Township | Ocean | 111 | 98 | 101 | -10 | -9.0% |
| Weymouth Township | Atlantic | 18 | 5 | 5 | -13 | -72.2% |
| Waterford Township | Camden | 2558 | 2607 | 2508 | -50 | -2.0% |
| Berkeley Township | Ocean | 76 | 26 | 26 | -50 | -65.8% |
| Port Republic City | Atlantic | 144 | 52 | 70 | -74 | -51.4% |
| Folsom Borough | Atlantic | 769 | 729 | 678 | -91 | -11.8% |
| Berlin Township | Camden | 124 | 28 | 28 | -96 | -77.4% |
| Woodbine Borough | Cape May | 392 | 317 | 290 | -102 | -26.0% |
| New Hanover Township | Burlington | 854 | 846 | 739 | -115 | -13.5% |
| Buena Borough | Atlantic | 1196 | 1034 | 1060 | -136 | -11.4% |
| Eagleswood Township | Ocean | 236 | 55 | 55 | -181 | -76.7% |
| Stafford Township | Ocean | 423 | 173 | 176 | -247 | -58.4% |
| Little Egg Harbor Township | Ocean | 458 | 135 | 131 | -327 | -71.4% |
| Washington Township | Burlington | 8715 | 7855 | 8194 | -521 | -6.0% |
| Galloway Township | Atlantic | 1616 | 1059 | 1039 | -577 | -35.7% |
| Evesham Township | Burlington | 2093 | 1415 | 1430 | -663 | -31.7% |
| Tabernacle Township | Burlington | 9316 | 6242 | 8576 | -740 | -7.9% |
| Monroe Township | Gloucester | 4523 | 4023 | 3762 | -761 | -16.8% |
| Manchester Township | Ocean | 3440 | 2665 | 2665 | -775 | -22.5% |
| Egg Harbor Township | Atlantic | 1730 | 886 | 954 | -776 | -44.9% |
| Bass River Township | Burlington | 6791 | 5966 | 5949 | -842 | -12.4% |
| Winslow Township | Camden | 6582 | 5886 | 5659 | -923 | -14.0% |
| Hamilton Township | Atlantic | 7035 | 6240 | 6055 | -980 | -13.9% |
| Medford Township | Burlington | 5877 | 5053 | 4884 | -993 | -16.9% |
| Dennis Township | Cape May | 2478 | 1440 | 1467 | -1011 | -40.8% |
| Plumsted Township | Ocean | 3677 | 2885 | 2653 | -1024 | -27.8% |
| Upper Township | Cape May | 2377 | 822 | 705 | -1672 | -70.3% |
| Jackson Township | Ocean | 3794 | 2086 | 2023 | -1771 | -46.7% |
| Pemberton Township | Burlington | 10155 | 9499 | 8191 | -1964 | -19.3% |
| Southampton Township | Burlington | 11418 | 9522 | 9425 | -1993 | -17.5% |
| Lacey Township | Ocean | 6212 | 4195 | 4195 | -2017 | -32.5% |
| Ocean Township | Ocean | 2986 | 1144 | 752 | -2234 | -74.8% |
| Maurice River Township | Cumberland | 9291 | 6687 | 6509 | -2782 | -29.9% |
| Estell Manor City | Atlantic | 9001 | 6066 | 5902 | -3099 | -34.4% |
| Franklin Township | Gloucester County | 9135 | 4830 | 4742 | -4393 | -48.1% |
| <i>Outside Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | |
| Berlin Borough | Camden | 9 | 6 | 9 | 0 | 0.0% |
| Corbin City | Atlantic | 3 | 3 | 2 | -1 | -33.3% |
| Toms River Township | Ocean | 114 | 0 | 0 | -114 | -100.0% |
| North Hanover Township | Burlington | 2018 | 292 | 304 | -1714 | -84.9% |
| Springfield Township | Burlington | 2574 | 175 | 176 | -2398 | -93.2% |
| Vineland City | Cumberland | 3895 | 707 | 673 | -3222 | -82.7% |

- In 2010, prices of cranberries decreased by 3.8%, and utilized production rose by 1.3%. In 2011, prices continued to drop (-6.2%), and utilized production decreased by 9.3%.
- Blueberries prices increased by 2.4% and 15.9% in 2010 and 2011, respectively, whereas utilized production first fell by 7.5%, but then rose by 26.5% the following year.

New Jersey Cranberry Production, Value and Volume



New Jersey Blueberry Production, Value and Volume



Description: Agriculture is recognized in federal and state Pinelands legislation as an industry of special significance and therefore receives a more detailed examination that uses three variables. The second indicator, *cranberry and blueberry production*, measures a critical component of Pinelands agriculture.

Unit of Analysis: Cranberry and blueberry data are only available at the state level, but because these crops are found almost exclusively within the Pinelands, statewide figures provide sufficient information for the purposes of this analysis.

Summary of Previous Findings

Examination of two key crops of the Pinelands, cranberries and blueberries, revealed that cranberry production grew significantly from 1972 to 1996. However, cranberries plummeted precipitously from 1997 to 1999 due to increased production (growers developed more efficient bogs to take advantage of good cranberry prices) without increased demand. Nationally, increased production combined with steady demand created a surplus of frozen cranberries. Increased foreign production of cranberries also may have been a contributing factor. A small recovery in cranberry farming began in 2000, which may have been aided by actions such as nationwide production cutbacks and USDA surplus. Production has increased by just 2.3% between 2000 and 2006. The value of production during that time increased dramatically, growing 73% between 2000 and 2006, with the price of cranberries climbing from \$22.48 per 100 lbs. in 2000 to \$53.9 per 100 lbs. in 2008, an increase of 139%. Despite this increase, prices remain well below their peak of \$86.22 per 100 lbs. in 1996.

Until recently, the value of utilized production for blueberries remained fairly steady, with yearly fluctuations from 1972 to 2004. Overall production increased by 36% between 2004 and 2008. The values of production increased dramatically during this four-year period, rising by 51%, while the sale price improved by 7.2%. In 2005, 2006 and 2007, the blueberry industry set records for the highest production and the highest value of utilized production during the entire 35-year monitoring period covered in this report.

The value in utilized production of cranberries increased for the fourth consecutive year in 2009, rising 12% to \$30.8 million. This increase was due to an increase in both price (+3%) and production (+8.4%) for the year. Cranberry prices finished the year at \$0.56/lb., which marks their highest level since 1997.

Blueberry prices decreased by 13.9% in 2009, posting a price of \$1.23/lb. Blueberry production also decreased 10% for the year, with the value of utilized production decreasing 23%. This decrease is trailing the 2005 to 2007 period, when the blueberry industry set the record for both the highest level of production and the highest utilized value of production during the entire monitoring period.

Update

The value in utilized production of cranberries continued on the downward trend that began in 2009, falling 17% to \$26.3 million in the two-year period. Prices, adjusted for inflation to 2011 dollars, fell by 3.8% in 2010 and again by 6.2% in 2011 to the current price of \$0.52/lb. This occurred while production rose 1.3% in 2010 and then dropped by 9.3% in 2011. Value of utilized production in 2011 is \$26 million; down 17.0% from a recent high in 2009.

Blueberry prices, adjusted for inflation to 2011 dollars, increased by 2.4% and 15.9% in 2010 and 2011, respectively, posting a final price of \$1.53/lb. This is still down from the previous high of \$1.81/lb. in 2007. Blueberry production decreased by 7.5% in 2010, and then increased by 26.5% in 2011. The value and volume of utilized production ascended to \$95 million and 62 million pounds in 2011. This is close to the 30-year peak in 2007, when the value stood at approximately \$98 million. Utilized production in 2011 exceeded the previous high of 59 million pounds.

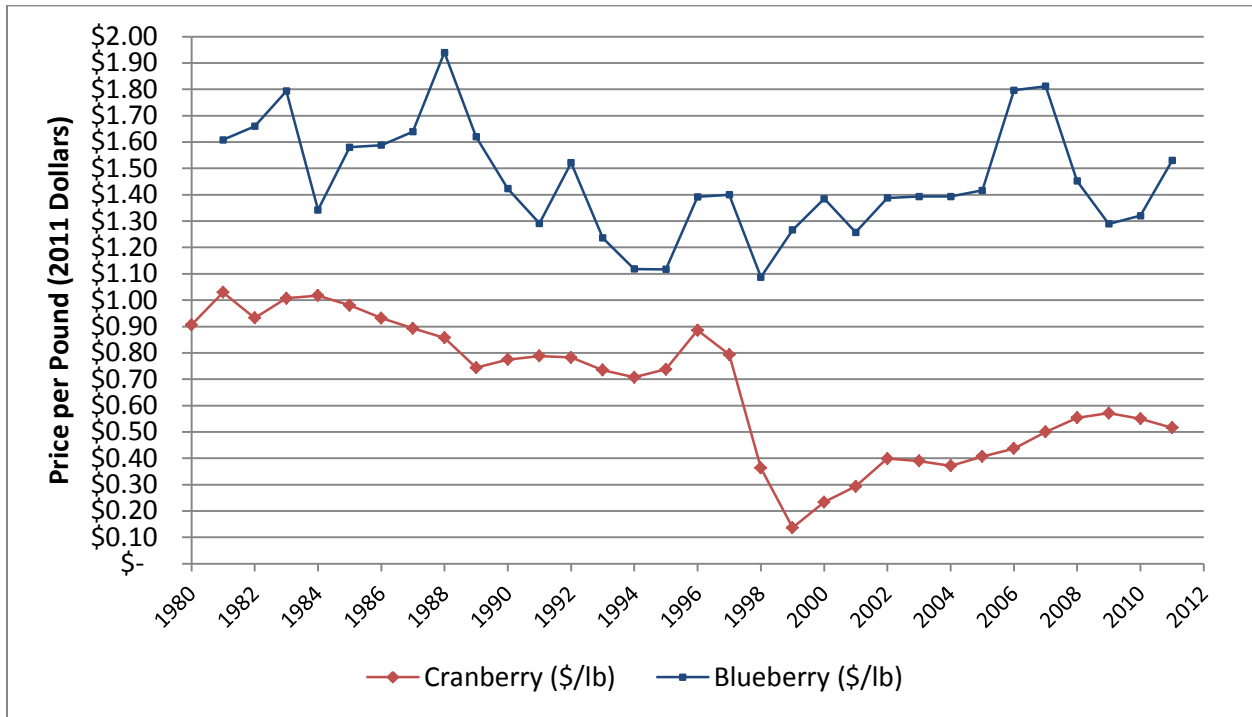
Table E6 Sales of New Jersey Farm Products (Adjusted to 2011 Dollars)¹⁸

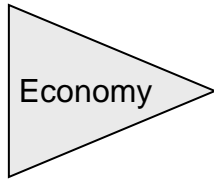
| Year | Value of production (in \$1,000s) | | Annual Percent Change | |
|------|-----------------------------------|-----------|-----------------------|-----------|
| | Cranberry | Blueberry | Cranberry | Blueberry |
| 1980 | \$22,205 | - | - | - |
| 1981 | \$23,471 | \$45,040 | 5.7% | - |
| 1982 | \$27,505 | \$49,790 | 17.2% | 10.5% |
| 1983 | \$23,470 | \$43,497 | -14.7% | -12.6% |
| 1984 | \$27,880 | \$38,926 | 18.8% | -10.5% |
| 1985 | \$31,374 | \$53,701 | 12.5% | 38.0% |
| 1986 | \$30,283 | \$47,648 | -3.5% | -11.3% |
| 1987 | \$25,005 | \$37,727 | -17.4% | -20.8% |
| 1988 | \$31,729 | \$40,595 | 26.9% | 7.6% |
| 1989 | \$21,717 | \$44,552 | -31.6% | 9.7% |
| 1990 | \$25,015 | \$33,457 | 15.2% | -24.9% |
| 1991 | \$25,761 | \$40,025 | 3.0% | 19.6% |
| 1992 | \$37,398 | \$34,983 | 45.2% | -12.6% |
| 1993 | \$28,361 | \$38,925 | -24.2% | 11.3% |
| 1994 | \$39,468 | \$35,221 | 39.2% | -9.5% |
| 1995 | \$33,505 | \$39,113 | -15.1% | 11.1% |
| 1996 | \$41,376 | \$47,325 | 23.5% | 21.0% |
| 1997 | \$46,166 | \$47,623 | 11.6% | 0.6% |
| 1998 | \$18,909 | \$39,137 | -59.0% | -17.8% |
| 1999 | \$9,546 | \$49,403 | -49.5% | 26.2% |
| 2000 | \$10,966 | \$47,156 | 14.9% | -4.5% |
| 2001 | \$12,088 | \$46,652 | 10.2% | -1.1% |
| 2002 | \$17,151 | \$58,504 | 41.9% | 25.4% |
| 2003 | \$18,719 | \$55,856 | 9.1% | -4.5% |
| 2004 | \$14,638 | \$54,335 | -21.8% | -2.7% |
| 2005 | \$21,670 | \$63,888 | 48.0% | 17.6% |
| 2006 | \$20,994 | \$93,412 | -3.1% | 46.2% |
| 2007 | \$26,557 | \$97,899 | 26.5% | 4.8% |
| 2008 | \$28,350 | \$85,660 | 6.8% | -12.5% |
| 2009 | \$31,715 | \$68,424 | 11.9% | -20.1% |
| 2010 | \$30,901 | \$64,483 | -2.6% | -5.8% |
| 2011 | \$26,316 | \$94,700 | -14.8% | 46.9% |

¹⁸ The Blueberry data from 1981 to present are not comparable to years prior due to differences in units calculated. Data are reported for 1981 to present only.

Figure E6

Cranberry and Blueberry Prices (Adjusted to 2011 Dollars)





7

Census of Agriculture

U.S. Census of Agriculture

1982, 1987, 1992, 1997, 2002, 2007



- According to the 2007 Census of Agriculture, the net cash return per farm in the seven Pinelands counties (\$42,000) is more than double the net cash return per farm in the remaining Non-Pinelands counties (\$17,000).

Description Agriculture is recognized in federal and state Pinelands legislation as an industry of special significance, and therefore receives a more detailed examination that uses three variables. The third indicator is actually a collection of indicators from the Agricultural Census, which is taken every five years.

Unit of Analysis: Agricultural Census data is limited to the county level and consequently inside/outside the Pinelands trends cannot be distinguished.

Summary of Previous Findings

The seven Pinelands counties contained nearly 34% (287,000 acres) of the roughly 847,000 farm acres reported for New Jersey in the 1992 Census of Agriculture. From 1982 to 1992, the state lost 7.5% of its farm base, with the Pinelands counties experiencing a 9.5% decline and the Non-Pinelands counties experiencing a 6.4% loss. That trend began to change in the subsequent decade. From 1992 to 2002, while the state lost 4.9% of its farm base, the Pinelands counties experienced a 3.1% increase and the Non-Pinelands counties experienced a 9.1% loss. Overall, from 1992 to 2002, farm acres in the Pinelands counties increased by roughly 3% to 295,959 acres, which represents almost 37% of state's 805,682 farm acres. Cape May and Gloucester Counties experienced declines in their farm base from 1992 to 2002. In contrast Atlantic, Burlington, Camden, Cumberland, and Ocean Counties experienced gains in farmland acreage over the same period.

The number of farms from 1992 to 2002 increased across all regions, while the size of the average farm showed uniform decreases across all regions. In the Pinelands, the number of farms increased by 6.5% during the ten-year period while the average farm size decreased by 2.2%. The numbers are more stark in the Non-Pinelands and statewide in this regard. The Non-Pinelands counties experienced a 10.9% increase in the number of farms while their average farm size decreased by 18.1%. Statewide total farms increased by 9.3% while average farm size decreased by 12.9%.

With respect to agricultural sales, the Pinelands counties contributed nearly 48% of total sales statewide in 1992. By 2002, this number had increased to 53% of total statewide sales. In 1982, the Pinelands counties contributed 45% of total agriculture sales statewide while accounting for only 35% of farm acreage.

In terms of net cash returns, farms in the Pinelands counties accounted for 57.4% of statewide net returns in 1997; up 3% from 1992. By 2002, this figure climbed to 68.4% for the Pinelands counties. Comparison of total net cash returns over the monitoring period (1987 to 2002) demonstrates the influence of economic conditions on the state's farm sector. The effect of the 1990 recession can be seen as statewide returns dropped 24.2% from 1987 to 1992, with the Non-Pinelands counties experiencing a steeper decline of 32.4% and the Pinelands counties a more moderate decline of 15.6%. Aggregate trends, however, were somewhat misleading, with the Pinelands county returns dropping 29% when Cumberland County's contribution was removed. The economic upswing can be seen as statewide returns increased 60.5% from 1992 to 1997, with the Pinelands counties experiencing a greater increase of 69.6% and the Non-Pinelands counties a more moderate increase of 49.8%.

Net cash return per farm in the Pinelands counties have also increased at a faster rate than the remainder of the state and remained at overall higher levels. As of 2002, net cash returns per farm in the Pinelands counties were twice as high as the remainder of the state (\$37,180 per farm in the Pinelands vs. \$18,099 statewide) and four times as high as in the Non-Pinelands (\$8,583).

More than half of New Jersey's farms lost money in 1987, 1992, 1997, and 2002. However, farmers in the Pinelands counties continued to fare better than farmers in the Non-Pinelands counties. In each of those years, 5-10% fewer farms in the Pinelands counties registered net losses than in the rest of the state. The percentage of farmers in the Pinelands counties that lost money in 2002 was 56.1%, while in the Non-Pinelands 64.4% lost money and statewide 61.6% showed net losses for the year.

Update

An examination of the 2007 Census of Agriculture shows that four dominant trends continued across all regions of the state from 2002 to 2007:

- (1) The total amount of land in farming continues to decrease;**
- (2) The absolute number of farms continues to increase;**
- (3) The average farm size continues to decrease;**
- (4) Agricultural sales continue to increase.**

In the previous Census released in 2002, the Pinelands counties generally fared favorably on all of these measures when compared to their Non-Pinelands counterparts. For example, the Pinelands counties actually increased total acreage in farming from 1997 to 2002, differing from the statewide trend. In the current 2007 census, the Pinelands counties did not fare quite as favorably to the Non-Pinelands counties over the five-year period from 2002 to 2007.

Over the five-year period, the Pinelands counties decreased their acres in farming by 12.5% to 258,882 acres. The remainder of counties in the state had a net decrease of 6.9% in acres farmed. Primarily, the decrease in the Pinelands is a result of reductions in Burlington and Gloucester counties. These reductions totaled almost 30,000 acres (Burlington -25,447 acres; down 22.9%, and Gloucester -4,091 acres, down 8.1%).

The same relative changes hold true for the number of farms during the 2002 to 2007 period. The Pinelands counties had an increase of 2.6% in the number of farms during the period, in contrast to a 4.8% increase in the rest of the state. Average farm size decreased in the Pinelands counties by 15.0% from 2002 to 2007, while the rest of the state saw a decline in average farm size of 11.2%.

Agricultural sales in all parts of the state continued an impressive climb despite the decrease in farm acreage and average farm size. The Pinelands counties increased their total agricultural sales by 14.3% from 2002 to 2007, while the rest of the counties in the state enjoyed a 19.6% increase in total sales. With \$530 million in sales in 2007, the Pinelands counties make up more than half of the state's agricultural sales (51.7%) while comprising only 35.3% of the total acres farmed in the state. In terms of net cash returns, farms in the Pinelands counties posted profits of \$137.1 million in 2007, a total that represents 54.6% of statewide agricultural profits. Net cash return per farm in the Pinelands counties increased 13.1% from 2002 to 2007. However, in the rest of the state, net cash return per farm almost doubled over the same period (+99%).

Farm viability continues to be an issue in New Jersey. In 2007, 57.8% of the farms in the Pinelands counties posted net losses. In the rest of the state, 62.2% of farms had net losses for the year. Gloucester and Ocean counties had the highest percentage of farms with losses in the Pinelands in 2007 (66.7% and 61.2%, respectively).

Table E7a

Agricultural Lands

| County | Land in Farming (acres) | | | | Percentage Change | | | |
|------------------|-------------------------|----------------|----------------|----------------|-------------------|-------------|---------------|--------------|
| | 1992 | 1997 | 2002 | 2007 | '92-'97 | '97-'02 | 02-'07 | 92-'07 |
| Atlantic | 29,606 | 31,620 | 30,337 | 30,372 | 6.8% | -4.1% | 0.1% | 2.6% |
| Burlington | 97,186 | 103,627 | 111,237 | 85,790 | 6.6% | 7.3% | -22.9% | -11.7% |
| Camden | 7,799 | 9,446 | 10,259 | 8,760 | 21.1% | 8.6% | -14.6% | 12.3% |
| Cape May | 11,644 | 9,840 | 10,037 | 7,976 | -15.5% | 2.0% | -20.5% | -31.5% |
| Cumberland | 68,627 | 67,194 | 71,097 | 69,489 | -2.1% | 5.8% | -2.3% | 1.3% |
| Gloucester | 61,748 | 58,888 | 50,753 | 46,662 | -4.6% | -13.8% | -8.1% | -24.4% |
| Ocean | 10,365 | 12,061 | 12,239 | 9,833 | 16.4% | 1.5% | -19.7% | -5.1% |
| Pinelands | 286,975 | 289,435 | 295,959 | 258,882 | 0.9% | 2.3% | -12.5% | -9.8% |
| Non-Pinelands | 560,620 | 567,474 | 509,723 | 474,568 | 1.2% | -10.2% | -6.9% | -15.3% |
| State Total | 847,595 | 856,909 | 805,682 | 733,450 | 1.1% | -6.0% | -9.0% | -13.5% |

| County | Number of Farms | | | | Percentage Change | | | |
|------------------|-----------------|--------------|--------------|--------------|-------------------|-------------|-------------|-------------|
| | 1992 | 1997 | 2002 | 2007 | '92-'97 | '97-'02 | 02-'07 | 92-'07 |
| Atlantic | 391 | 465 | 456 | 499 | 18.9% | -1.9% | 9.4% | 27.6% |
| Burlington | 816 | 935 | 906 | 922 | 14.6% | -3.1% | 1.8% | 13.0% |
| Camden | 188 | 236 | 216 | 225 | 25.5% | -8.5% | 4.2% | 19.7% |
| Cape May | 163 | 165 | 197 | 201 | 1.2% | 19.4% | 2.0% | 23.3% |
| Cumberland | 609 | 622 | 616 | 615 | 2.1% | -1.0% | -0.2% | 1.0% |
| Gloucester | 704 | 718 | 692 | 669 | 2.0% | -3.6% | -3.3% | -5.0% |
| Ocean | 233 | 268 | 217 | 255 | 15.0% | -19.0% | 17.5% | 9.4% |
| Pinelands | 3,104 | 3,101 | 3,300 | 3,386 | -0.1% | 6.4% | 2.6% | 9.1% |
| Non-Pinelands | 5,975 | 6,944 | 6,624 | 6,941 | 16.2% | -4.6% | 4.8% | 16.2% |
| State Total | 9,079 | 10,045 | 9,924 | 10,327 | 10.6% | -1.2% | 4.1% | 13.7% |

| County | Average Farm Size (acres) | | | | Percentage Change | | | |
|------------------|---------------------------|-----------|-----------|-----------|-------------------|--------------|---------------|---------------|
| | 1992 | 1997 | 2002 | 2007 | '92-'97 | '97-'02 | 02-'07 | 92-'07 |
| Atlantic | 76 | 68 | 67 | 61 | -10.5% | -2.2% | -9.2% | -19.9% |
| Burlington | 119 | 111 | 123 | 93 | -6.9% | 10.8% | -24.4% | -21.8% |
| Camden | 41 | 40 | 47 | 39 | -2.4% | 18.7% | -17.2% | -5.0% |
| Cape May | 71 | 60 | 51 | 40 | -16.0% | -14.6% | -22.2% | -44.1% |
| Cumberland | 113 | 108 | 115 | 113 | -4.4% | 6.8% | -1.7% | 0.0% |
| Gloucester | 88 | 82 | 73 | 70 | -6.8% | -10.6% | -4.5% | -20.7% |
| Ocean | 44 | 45 | 56 | 39 | 2.3% | 25.3% | -31.1% | -12.4% |
| Pinelands | 92 | 93 | 90 | 76 | 1.5% | -3.9% | -15.0% | -16.9% |
| Non-Pinelands | 94 | 82 | 77 | 68 | -13.1% | -5.8% | -11.2% | -27.3% |
| State Total | 93 | 85 | 81 | 71 | -8.3% | -4.8% | -12.3% | -23.6% |

Table E7b

Agricultural Sales (Adjusted to 2008 Dollars)

| County | Agricultural Sales (\$1,000s) | | | | Percentage Change | | | | Agricultural Sales as % of NJ | | | |
|------------------|-------------------------------|------------------|------------------|------------------|-------------------|--------------|--------------|--------------|-------------------------------|--------------|--------------|--------------|
| | 1992 | 1997 | 2002 | 2007 | '92-'97 | '97-'02 | '02-'07 | '92-'07 | 1992 | 1997 | 2002 | 2007 |
| Atlantic | \$66,889 | \$85,421 | \$94,261 | \$133,267 | 27.7% | 10.3% | 41.4% | 99.2% | 8.2% | 9.1% | 10.7% | 13.0% |
| Burlington | \$99,404 | \$117,811 | \$99,958 | \$89,616 | 18.5% | -15.2% | -10.3% | -9.8% | 12.1% | 12.6% | 11.4% | 8.7% |
| Camden | \$12,594 | \$23,516 | \$16,374 | \$19,266 | 86.7% | -30.4% | 17.7% | 53.0% | 1.5% | 2.5% | 1.9% | 1.9% |
| Cape May | \$8,643 | \$9,161 | \$13,509 | \$15,146 | 6.0% | 47.5% | 12.1% | 75.2% | 1.1% | 1.0% | 1.5% | 1.5% |
| Cumberland | \$112,383 | \$126,717 | \$147,287 | \$162,965 | 12.8% | 16.2% | 10.6% | 45.0% | 13.7% | 13.5% | 16.8% | 15.9% |
| Gloucester | \$84,026 | \$90,135 | \$79,255 | \$97,488 | 7.3% | -12.1% | 23.0% | 16.0% | 10.2% | 9.6% | 9.0% | 9.5% |
| Ocean | \$7,770 | \$10,996 | \$12,880 | \$11,957 | 41.5% | 17.1% | -7.2% | 53.9% | 0.9% | 1.2% | 1.5% | 1.2% |
| Pinelands | \$391,708 | \$463,757 | \$463,524 | \$529,707 | 18.4% | -0.1% | 14.3% | 35.2% | 47.7% | 49.4% | 52.8% | 51.7% |
| Rest of N.J. | \$428,904 | \$474,826 | \$413,915 | \$495,075 | 10.7% | -12.8% | 19.6% | 15.4% | 52.3% | 50.6% | 47.2% | 48.3% |
| State Total | \$820,612 | \$938,583 | \$877,440 | \$1,024,781 | 14.4% | -6.5% | 16.8% | 24.9% | 100.0% | 100.0% | 100.0% | 100.0% |

Table E7c

**Net Cash Return for New Jersey Farms
(Adjusted to 2008 Dollars)**

| County | Net Cash Return (\$1,000's) | | | Percentage Change | | | Net Cash Return as % of NJ | | |
|------------------|-----------------------------|------------------|------------------|-------------------|--------------|--------------|----------------------------|--------------|--------------|
| | 1997 | 2002 | 2007 | '97-'02 | '02-'07 | '97-'07 | 1997 | 2002 | 2007 |
| Atlantic | \$17,542 | \$28,037 | \$46,246 | 59.8% | 64.9% | 163.6% | 8.4% | 17.8% | 18.4% |
| Burlington | \$27,948 | \$23,347 | \$18,506 | -16.5% | -20.7% | -33.8% | 13.5% | 14.8% | 7.4% |
| Camden | \$9,263 | \$3,977 | \$6,856 | -57.1% | 72.4% | -26.0% | 4.5% | 2.5% | 2.7% |
| Cape May | \$2,287 | \$5,637 | \$5,927 | 146.4% | 5.1% | 159.2% | 1.1% | 3.6% | 2.4% |
| Cumberland | \$34,678 | \$34,152 | \$36,907 | -1.5% | 8.1% | 6.4% | 16.7% | 21.7% | 14.7% |
| Gloucester | \$24,340 | \$10,901 | \$21,862 | -55.2% | 100.6% | -10.2% | 11.7% | 6.9% | 8.7% |
| Ocean | \$3,115 | \$1,631 | \$815 | -47.6% | -50.0% | -73.8% | 1.5% | 1.0% | 0.3% |
| Pinelands | \$119,173 | \$107,681 | \$137,119 | -9.6% | 27.3% | 15.1% | 57.4% | 68.4% | 54.6% |
| Rest of N.J. | \$88,527 | \$49,838 | \$114,241 | -43.7% | 129.2% | 29.0% | 42.6% | 31.6% | 45.4% |
| New Jersey | \$207,700 | \$157,519 | \$251,360 | -24.2% | 59.6% | 21.0% | 100.0% | 100.0% | 100.0% |

Table E7d

**Net Cash Return per Farm
(Adjusted to 2008 Dollars)**

| County | Net Cash Return per Farm | | | Percentage Change | | |
|------------------|--------------------------|-----------------|-----------------|-------------------|--------------|--------------|
| | 1997 | 2002 | 2007 | '97-'02 | '02-'07 | '97-'07 |
| Atlantic | \$47,379 | \$70,081 | \$96,237 | 47.9% | 37.3% | 103.1% |
| Burlington | \$37,214 | \$29,276 | \$20,843 | -21.3% | -28.8% | -44.0% |
| Camden | \$50,517 | \$21,081 | \$31,642 | -58.3% | 50.1% | -37.4% |
| Cape May | \$17,493 | \$32,285 | \$30,619 | 84.6% | -5.2% | 75.0% |
| Cumberland | \$68,860 | \$63,192 | \$62,316 | -8.2% | -1.4% | -9.5% |
| Gloucester | \$42,615 | \$17,980 | \$33,933 | -57.8% | 88.7% | -20.4% |
| Ocean | \$15,042 | \$8,644 | \$3,317 | -42.5% | -61.6% | -78.0% |
| Pinelands | \$43,860 | \$37,180 | \$42,051 | -15.2% | 13.1% | -4.1% |
| Non-Pinelands | \$16,825 | \$8,583 | \$17,091 | -49.0% | 99.1% | 1.6% |
| New Jersey | \$26,032 | \$18,099 | \$25,275 | -30.5% | 39.6% | -2.9% |

Table E7e

Farms with Net Losses

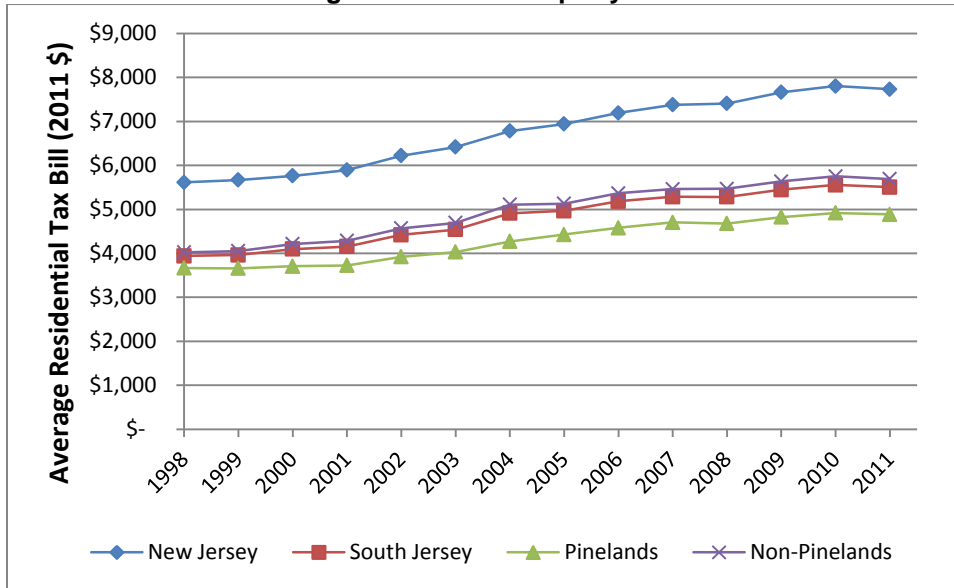
| County | Farms with Net Losses | | | % of All Farms with Net Losses | | |
|------------------|-----------------------|--------------|--------------|--------------------------------|---------------|---------------|
| | 1997 | 2002 | 2007 | 1997 | 2002 | 2007 |
| Atlantic | 227 | 197 | 275 | 53.50% | 43.20% | 55.10% |
| Burlington | 369 | 478 | 526 | 43.10% | 52.80% | 57.00% |
| Camden | 94 | 108 | 133 | 44.50% | 50.00% | 59.10% |
| Cape May | 75 | 111 | 103 | 50.30% | 56.30% | 51.20% |
| Cumberland | 248 | 314 | 319 | 43.30% | 51.00% | 51.90% |
| Gloucester | 286 | 513 | 446 | 43.90% | 74.10% | 66.70% |
| Ocean | 114 | 131 | 156 | 48.50% | 60.40% | 61.20% |
| Pinelands | 1,413 | 1,852 | 1,958 | 45.60% | 56.10% | 57.80% |
| Non-Pinelands | 3,582 | 4,265 | 4,320 | 59.70% | 64.40% | 62.20% |
| New Jersey | 4,995 | 6,117 | 6,278 | 54.90% | 61.60% | 60.80% |

Average Residential Property Tax Bill

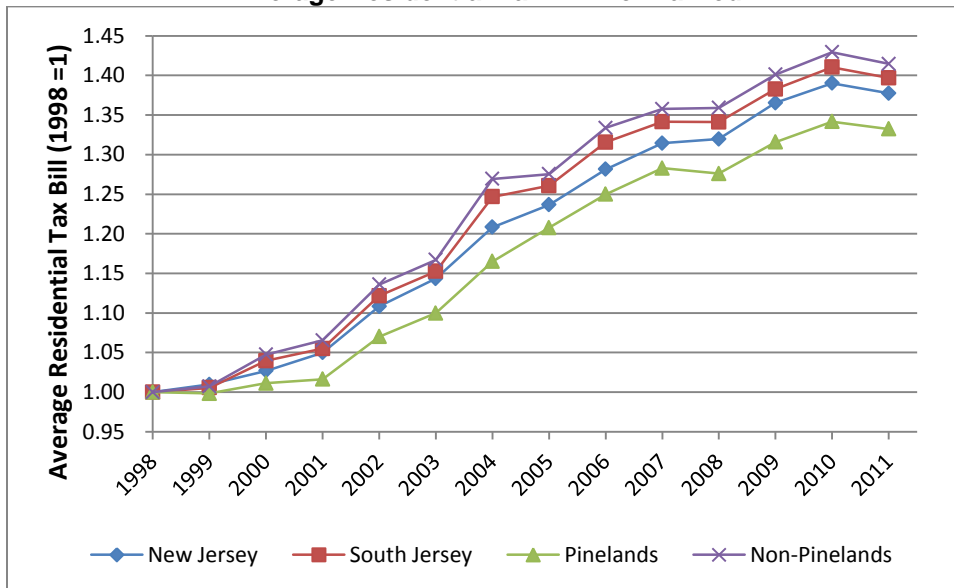
N.J. Dept. of Treasury, Division of Taxation 1983 - 1999
 N.N. Dept. of Community Affairs, Div. LGS 2000 - 2011

- Average residential property tax bills in the Pinelands continue to be lower than the statewide average (37% lower) and 14% lower than the Non-Pinelands in 2010 and 2011.
- Generally, bills increased in 2010, but showed declines in 2011.

Average Residential Property Tax Bill



Average Residential Tax Bill Normalized



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. Values are adjusted for inflation and shown in 2009 dollars.

Unit of Analysis: Average residential property tax data are compiled at the municipal level and aggregated to allow for inside/outside the Pinelands, regional, and statewide analyses.

Summary of Previous Findings

Average residential property tax bills in New Jersey demonstrated a gradual yet steady pattern of increase throughout the 1980s. Following a large one-year decline in 1991, residential property taxes subsequently began a slow, continued increase from 1992 to 2006. The annual rate of change during the monitoring period was virtually the same for all geographic areas. By 1998, average residential tax bills in all areas surpassed their previous 1990 peaks. From 1998 to 2008, real tax rates increased by 40% in the Non-Pinelands as opposed to 33% in the Pinelands.

The rate of growth for the average residential property tax bill slowed considerably across all regions in 2009. Statewide, average residential property taxes rose just 0.4%, while in southern New Jersey there was a slight increase of less than 0.02% for the year. The Pinelands communities registered a 0.04% increase in average residential property taxes versus a 0.02% increase in the Non-Pinelands. Average residential property taxes in the Pinelands are now \$741 lower than in the Non-Pinelands and \$2,682 lower than the state as a whole. As a result, the gap between the taxes paid in the Pinelands and other regions remained steady in 2009.

The average residential property tax bill in New Jersey, adjusted for inflation, has increased by 52% between 1989 and 2009, from \$4,793 to \$7,308. Within southern New Jersey, the Pinelands average bills increased by 48% (from \$3,121 to \$4,626) while the Non-Pinelands average bill increased by 57% (from \$3,414 to \$5,368).

The rapidly growing second ring of suburbs surrounding the Philadelphia metropolitan area experienced the highest increases in average residential property taxes during the past 20 years. Smaller concentrations of increasing tax bills exist in Ocean County and along the shore. The southern, rural municipalities had the smallest increases in property taxes from 1988 to 2009.

From 2008 to 2009, seven (15%) of the 47 Pinelands municipalities, that have at least 10% of its total land area in the Pinelands boundary, experienced real tax decreases. In the remaining 155 municipalities that comprise the Non-Pinelands, 21 had real tax decreases from 2008 to 2008 (14%).

Update

The growth rate of the average residential tax bill for all four regions showed the first decline in the last 14 years. This occurred as the average residential tax bill rose in 2010, but then dropped in 2011. The state saw average tax bills increase by 1.8% in 2010 while the Pinelands, the Non-Pinelands, southern New Jersey saw an increase of 2%. In 2011, however, average tax bills in the Pinelands fell by 0.7%, while the state's average tax bills fell by 0.9% and the Non-Pinelands and southern New Jersey both dropped by 1%. The Pinelands has the lowest average obligation at \$4,884 versus \$7,730 for the state and \$5,691 for the Non-Pinelands. The percentage gap between the Pinelands and the other regions has remained fairly constant.

Among municipalities with any amount of land area in the Pinelands Area, 42 saw their 2011 average residential tax bill decline from 2010. Beachwood Borough saw the smallest decrease at 0.03%, while Corbin City had the largest decrease at 23%. Conversely, average residential tax bills in 11 municipalities rose, with the smallest increase at 1.4% in Washington Township to the highest increase at 13.1% in Wrightstown Borough.

Figure F1a

Average Residential Property Tax Bill - 2010

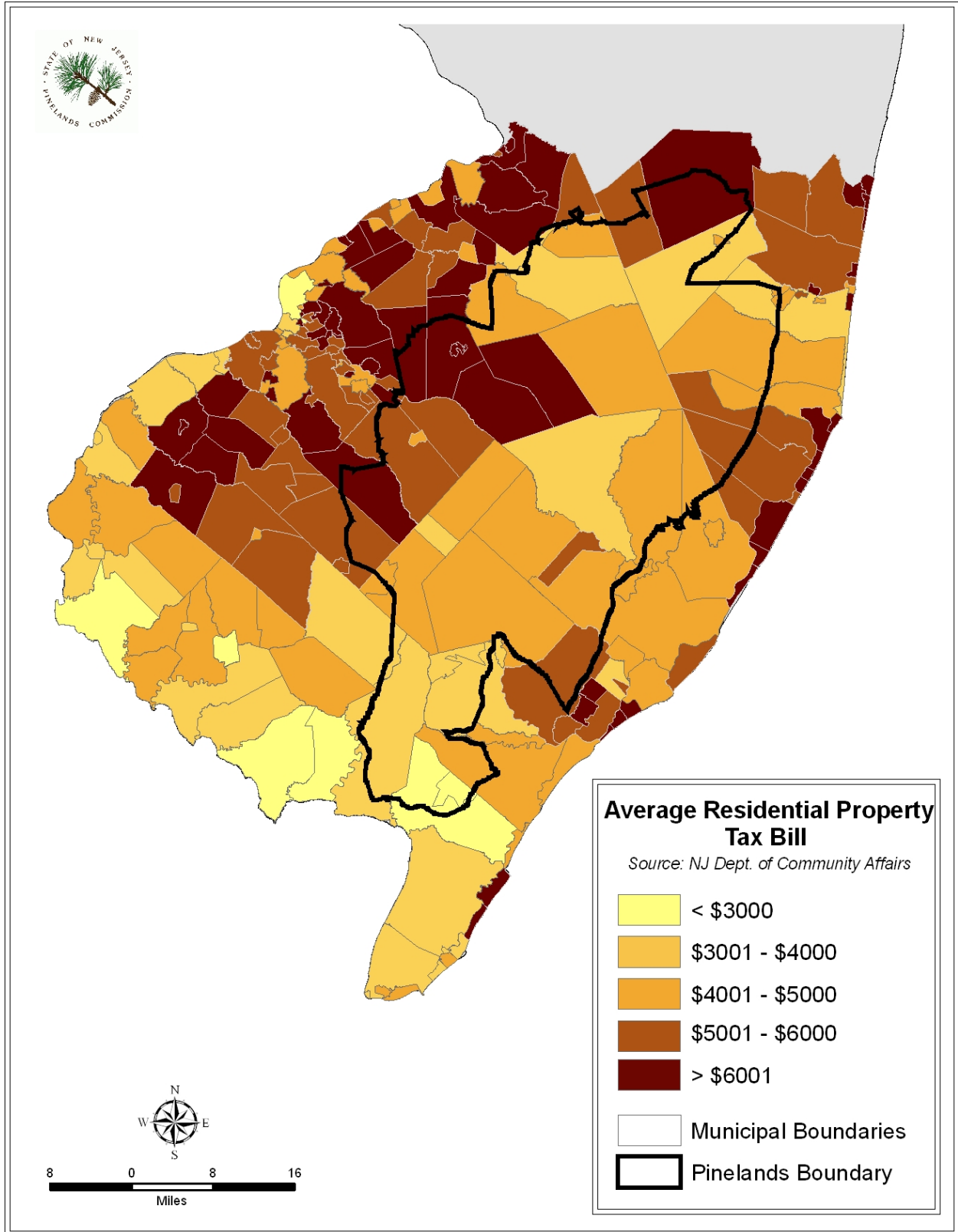


Figure F1b

Average Residential Property Tax Bill - 2011

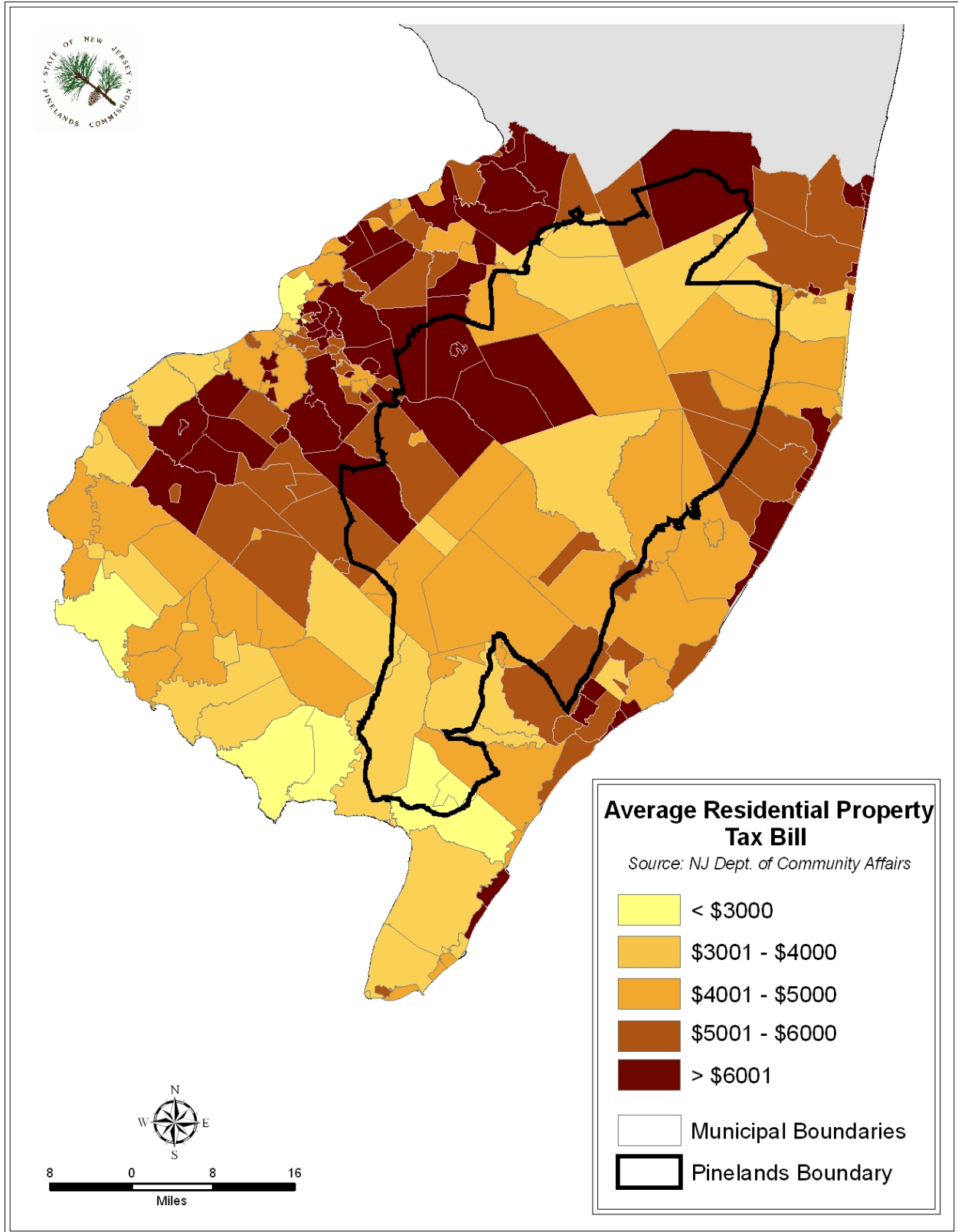


Table F1

Average Residential Property Tax Bill in the Pinelands

(Sorted by the Actual Change in Tax Bills from 2010)

| Municipality | County | 2010 Ave Tax Bill | 2011 Ave Tax Bill | Actual Change from 2010 | % Change from 2010 | Southern New Jersey Rank |
|---|------------|-------------------|-------------------|-------------------------|--------------------|--------------------------|
| Wrightstown Borough | Burlington | \$3,461 | \$3,913 | \$452 | 13.1% | 169 |
| Egg Harbor City | Atlantic | \$5,306 | \$5,619 | \$313 | 5.9% | 80 |
| Berlin Township | Camden | \$5,176 | \$5,478 | \$303 | 5.8% | 84 |
| Chesilhurst Borough | Camden | \$4,513 | \$4,736 | \$223 | 4.9% | 125 |
| Maurice River Township | Cumberland | \$3,700 | \$3,907 | \$206 | 5.6% | 171 |
| Jackson Township | Ocean | \$6,281 | \$6,458 | \$177 | 2.8% | 48 |
| Upper Township | Cape May | \$4,228 | \$4,383 | \$155 | 3.7% | 151 |
| Manchester Township | Ocean | \$3,530 | \$3,624 | \$94 | 2.7% | 185 |
| Buena Vista Township | Atlantic | \$4,201 | \$4,269 | \$69 | 1.6% | 155 |
| Washington Township | Burlington | \$3,432 | \$3,481 | \$49 | 1.4% | 188 |
| Beachwood Borough | Ocean | \$4,396 | \$4,395 | -\$2 | 0.0% | 149 |
| South Toms River Borough | Ocean | \$4,215 | \$4,211 | -\$4 | -0.1% | 157 |
| Hammonton Town | Atlantic | \$4,691 | \$4,687 | -\$4 | -0.1% | 127 |
| Weymouth Township | Atlantic | \$4,060 | \$4,054 | -\$7 | -0.2% | 163 |
| Buena Borough | Atlantic | \$4,401 | \$4,390 | -\$10 | -0.2% | 150 |
| Winslow Township | Camden | \$5,382 | \$5,367 | -\$15 | -0.3% | 87 |
| Lakehurst Borough | Ocean | \$4,425 | \$4,404 | -\$21 | -0.5% | 148 |
| Woodbine Borough | Cape May | \$1,487 | \$1,464 | -\$23 | -1.6% | 201 |
| Port Republic City | Atlantic | \$5,153 | \$5,124 | -\$29 | -0.6% | 102 |
| Folsom Borough | Atlantic | \$3,422 | \$3,392 | -\$29 | -0.9% | 190 |
| Galloway Township | Atlantic | \$4,579 | \$4,541 | -\$37 | -0.8% | 137 |
| Lacey Township | Ocean | \$4,706 | \$4,667 | -\$39 | -0.8% | 130 |
| Hamilton Township | Atlantic | \$4,487 | \$4,447 | -\$41 | -0.9% | 141 |
| Little Egg Harbor Township | Ocean | \$4,469 | \$4,425 | -\$44 | -1.0% | 146 |
| Stafford Township | Ocean | \$5,731 | \$5,677 | -\$54 | -0.9% | 78 |
| Egg Harbor Township | Atlantic | \$5,766 | \$5,706 | -\$60 | -1.0% | 77 |
| Dennis Township | Cape May | \$2,795 | \$2,729 | -\$66 | -2.4% | 197 |
| Waterford Township | Camden | \$6,109 | \$6,023 | -\$85 | -1.4% | 63 |
| Pemberton Township | Burlington | \$3,439 | \$3,350 | -\$88 | -2.6% | 192 |
| Franklin Township | Gloucester | \$5,236 | \$5,143 | -\$94 | -1.8% | 101 |
| Barnegat Township | Ocean | \$5,810 | \$5,707 | -\$103 | -1.8% | 76 |
| Mullica Township | Atlantic | \$4,703 | \$4,600 | -\$103 | -2.2% | 132 |
| Ocean Township | Ocean | \$4,670 | \$4,561 | -\$109 | -2.3% | 136 |
| Plumsted Township | Ocean | \$5,712 | \$5,585 | -\$127 | -2.2% | 81 |
| Berkeley Township | Ocean | \$3,783 | \$3,652 | -\$131 | -3.5% | 184 |
| Monroe Township | Gloucester | \$6,563 | \$6,419 | -\$144 | -2.2% | 51 |
| Evesham Township | Burlington | \$6,950 | \$6,800 | -\$150 | -2.2% | 34 |
| Bass River Township | Burlington | \$4,339 | \$4,180 | -\$160 | -3.7% | 159 |
| Shamong Township | Burlington | \$7,793 | \$7,612 | -\$181 | -2.3% | 19 |
| Southampton Township | Burlington | \$5,156 | \$4,960 | -\$195 | -3.8% | 113 |
| Medford Township | Burlington | \$9,173 | \$8,977 | -\$196 | -2.1% | 9 |
| Eagleswood Township | Ocean | \$5,252 | \$5,054 | -\$198 | -3.8% | 109 |
| Estell Manor City | Atlantic | \$4,065 | \$3,859 | -\$205 | -5.0% | 173 |
| New Hanover Township | Burlington | \$4,160 | \$3,950 | -\$210 | -5.0% | 166 |
| Tabernacle Township | Burlington | \$6,937 | \$6,726 | -\$211 | -3.0% | 38 |
| Woodland Township | Burlington | \$5,075 | \$4,840 | -\$235 | -4.6% | 120 |
| Medford Lakes Borough | Burlington | \$8,242 | \$8,004 | -\$238 | -2.9% | 14 |
| <i>Outside Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | |
| Toms River Township | Ocean | \$5,229 | \$5,345 | \$115 | 2.2% | 89 |
| Vineland City | County | \$3,925 | \$3,879 | -\$45 | -1.2% | 172 |
| Springfield Township | Burlington | \$7,344 | \$7,219 | -\$125 | -1.7% | 23 |
| Berlin Borough | Camden | \$6,573 | \$6,324 | -\$249 | -3.8% | 53 |
| North Hanover Township | Burlington | \$5,943 | \$5,671 | -\$272 | -4.6% | 79 |
| Corbin City | Atlantic | \$4,207 | \$3,238 | -\$969 | -23.0% | 193 |

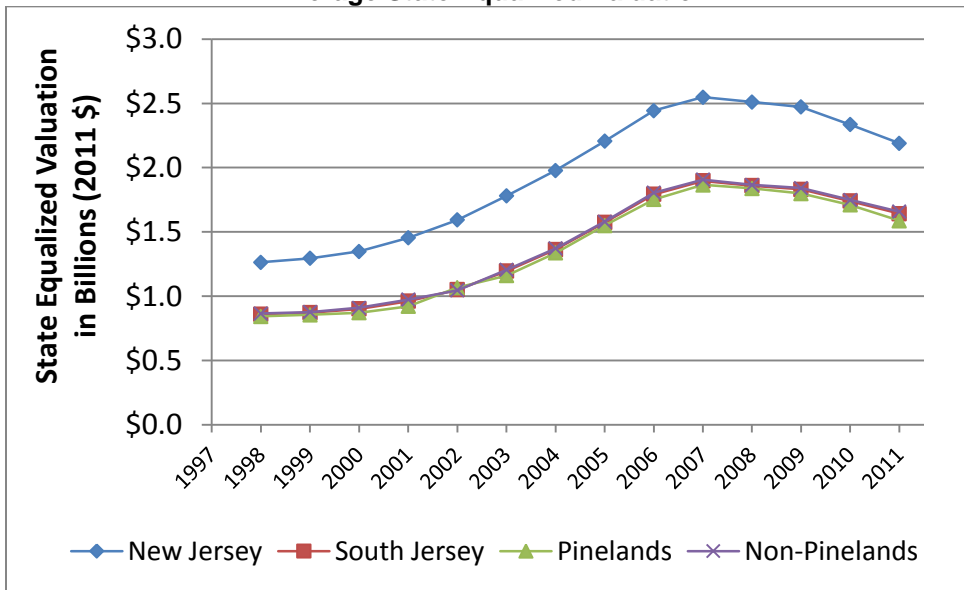
State Equalized Valuation

N.J. Department of Community Affairs 1980 – 1993

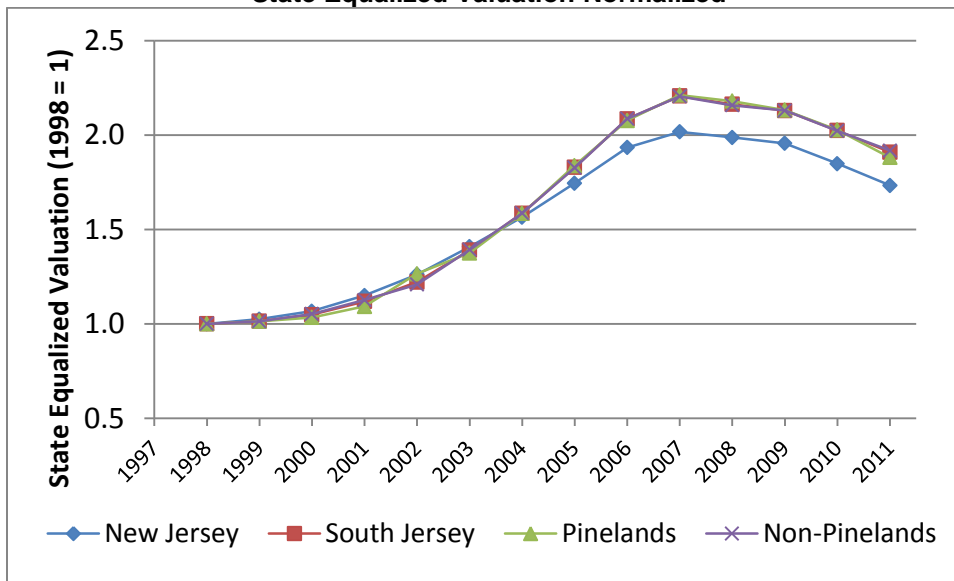
N.J. Department of Treasury, Division of Taxation 1994-2011

- In 2010 and 2011, the Pinelands equalized property values decreased at a slightly faster rate than the Non-Pinelands area and the state as a whole from their 2009 state equalized valuations (-11.8% vs. -9.9% & -11.4%, respectively).

Average State Equalized Valuation



State Equalized Valuation Normalized



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. Values are adjusted for inflation and shown in 2011 dollars.

Unit of Analysis: State equalized valuation data are compiled at the municipal level and aggregated to allow for inside/outside the Pinelands, regional, and statewide analyses.

Summary of Previous Findings

Equalized property valuation in New Jersey rose throughout the 1980s, with most of the growth concentrated in the latter part of the decade. Average municipal valuation in the Pinelands, roughly mirroring that of the Non-Pinelands, was lower than the average municipal valuation of the Non-Pinelands, however the difference is narrowing. Conversely, while average valuation in southern New Jersey remained lower than average valuation in the entire state, the differential did not diminish during the monitoring period. Following a peak in 1989, statewide average valuation experienced a steeper decline than average valuation throughout southern New Jersey. From 1990 to 1997, average equalized valuation declined across all areas of the state. This trend reversed after 1997 as average equalized property valuations rose in all regions between 1998 and 2008.

After 11 consecutive years of increasing property values statewide, all regions experienced a decline in equalized property values in 2009. The decline in valuation for the average Non-Pinelands municipality was slightly more than in the Pinelands (-13.3% versus -8.2%). Statewide, equalized property values mirrored the 8.2% decrease in the Pinelands, as the continued downturn in the real estate market finally began to show up as real decreases in total property values. The valuation for the average Pinelands municipality was \$1.65 billion in 2009, compared to an average of \$1.6 billion for the average Non-Pinelands municipality. This marks the second time in the program's entire monitoring period that the valuation for the average Pinelands municipality is greater than the average Non-Pinelands municipalities, with the first being in 2007.

Per capita equalized values in 2009 show that the state has a higher equalized value per capita than southern New Jersey (\$147,109 versus \$140,785), while the Pinelands region has a much lower per capita value compared to the Non-Pinelands region (\$113,088 versus \$151,730). The Pinelands municipalities exhibit a great deal of variation, with per capita values ranging from a high of \$198,028 in Upper Township to a low of \$10,123 in New Hanover Township.

Update

The ongoing downturn in the real estate market continues to cause decreases in total property values. From 2009 to 2011, state equalized valuation decreased in the Pinelands slightly faster than the Non-Pinelands, southern New Jersey, and the state. The 2011 state equalized valuation in the Pinelands fell to \$1.6 billion; a -11.8% change since 2009 (a -4.9% change in 2010 and a -7.2% change in 2011). Likewise, from 2009 to 2011 the Non-Pinelands fell 9.9% to \$1.7 billion, southern New Jersey fell 10.4% to \$1.6 billion, and the state fell 11.4% to \$2.2 billion. Despite its lower valuation, the Pinelands municipalities continue to follow a trend roughly similar to that of the rest of the state and region.

The Pinelands municipal state equalized valuation exhibit a great deal of variation. In 2011, per capita values (of those with at least 10% of their total land area in the Pinelands) range from a high of \$174,303 in Upper Township, a decrease of \$37,679 from 2009 (adjusted for inflation), to a low of \$12,724 in New Hanover Township, an increase of \$2,029 in 2009 (adjusted for inflation). Of the 53 municipalities that comprise the Pinelands (including those with less than 10% of their total area within the Pinelands boundaries), 47 municipalities dropped in valuations, while six showed an increase from 2009 to 2011.

Table F2

Equalized Value and Equalized Value Per Capita

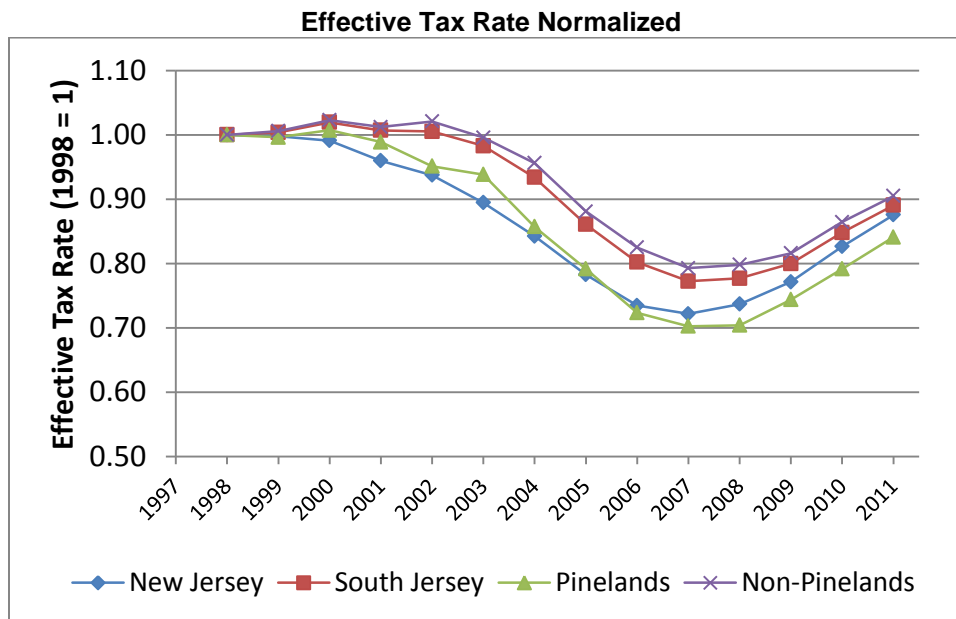
(Sorted by Equalized Value per Capita)

| Municipality | County | 2011 Population Estimate | 2011 Equalized Value | Equalized Value per Capita |
|---|------------|--------------------------|----------------------|----------------------------|
| Upper Township | Cape May | 12,286 | \$2,141,484,478 | \$174,303 |
| Stafford Township | Ocean | 26,665 | \$4,564,018,332 | \$171,161 |
| Eagleswood Township | Ocean | 1,610 | \$272,097,509 | \$169,005 |
| Ocean Township | Ocean | 8,372 | \$1,400,848,358 | \$167,325 |
| Washington Township | Burlington | 689 | \$101,567,969 | \$147,414 |
| Lacey Township | Ocean | 27,781 | \$4,087,246,253 | \$147,124 |
| Dennis Township | Cape May | 6,422 | \$922,947,497 | \$143,717 |
| Medford Township | Burlington | 23,077 | \$3,194,091,745 | \$138,410 |
| Little Egg Harbor Township | Ocean | 20,162 | \$2,755,261,774 | \$136,656 |
| Berkeley Township | Ocean | 41,455 | \$5,585,010,235 | \$134,725 |
| Bass River Township | Burlington | 1,447 | \$189,568,434 | \$131,008 |
| Port Republic City | Atlantic | 1,113 | \$140,527,675 | \$126,260 |
| Jackson Township | Ocean | 55,129 | \$6,811,534,068 | \$123,556 |
| Evesham Township | Burlington | 45,624 | \$5,490,269,939 | \$120,337 |
| Barnegat Township | Ocean | 21,037 | \$2,438,494,652 | \$115,915 |
| Medford Lakes Borough | Burlington | 4,153 | \$478,904,096 | \$115,315 |
| Shamong Township | Burlington | 6,473 | \$737,870,511 | \$113,992 |
| Southampton Township | Burlington | 10,484 | \$1,188,994,258 | \$113,410 |
| Tabernacle Township | Burlington | 6,992 | \$759,288,146 | \$108,594 |
| Plumsted Township | Ocean | 8,463 | \$911,747,312 | \$107,733 |
| Estell Manor City | Atlantic | 1,734 | \$185,249,980 | \$106,834 |
| Berlin Township | Camden | 5,353 | \$567,597,854 | \$106,034 |
| Egg Harbor Township | Atlantic | 43,288 | \$4,452,947,641 | \$102,868 |
| Folsom Borough | Atlantic | 1,884 | \$189,932,924 | \$100,814 |
| Hammonton Town | Atlantic | 14,779 | \$1,416,743,897 | \$95,862 |
| Manchester Township | Ocean | 43,278 | \$4,060,276,520 | \$93,818 |
| Mullica Township | Atlantic | 6,144 | \$572,318,923 | \$93,151 |
| Hamilton Township | Atlantic | 26,483 | \$2,440,494,387 | \$92,153 |
| Galloway Township | Atlantic | 37,322 | \$3,406,387,628 | \$91,270 |
| Woodland Township | Burlington | 1,790 | \$161,529,771 | \$90,240 |
| Beachwood Borough | Ocean | 11,099 | \$967,989,643 | \$87,214 |
| Waterford Township | Camden | 10,641 | \$873,399,869 | \$82,079 |
| Franklin Township | Gloucester | 16,869 | \$1,380,851,777 | \$81,857 |
| Buena Vista Township | Atlantic | 7,564 | \$613,946,285 | \$81,167 |
| Monroe Township | Gloucester | 36,232 | \$2,775,018,403 | \$76,590 |
| Woodbine Borough | Cape May | 2,459 | \$180,327,683 | \$73,334 |
| Winslow Township | Camden | 39,466 | \$2,818,882,144 | \$71,426 |
| South Toms River Borough | Ocean | 3,701 | \$261,900,401 | \$70,765 |
| Lakehurst Borough | Ocean | 2,668 | \$181,666,543 | \$68,091 |
| Egg Harbor City | Atlantic | 4,240 | \$286,279,621 | \$67,519 |
| Buena Borough | Atlantic | 4,600 | \$297,357,482 | \$64,643 |
| Wrightstown Borough | Burlington | 804 | \$51,348,975 | \$63,867 |
| Weymouth Township | Atlantic | 2,712 | \$169,659,272 | \$62,559 |
| Pemberton Township | Burlington | 27,966 | \$1,571,941,653 | \$56,209 |
| Chesilhurst Borough | Camden | 1,633 | \$89,103,076 | \$54,564 |
| Maurice River Township | Cumberland | 7,696 | \$340,271,018 | \$44,214 |
| New Hanover Township | Burlington | 7,396 | \$94,103,315 | \$12,724 |
| <i>Outside Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | |
| Toms River Township | Ocean | 91,680 | \$16,559,248,450 | \$180,620 |
| Corbin City | Atlantic | 491 | \$63,743,467 | \$129,824 |
| Springfield Township | Burlington | 3,420 | \$427,510,541 | \$125,003 |
| Berlin Borough | Camden | 7,583 | \$803,033,993 | \$105,899 |
| Vineland City | Cumberland | 60,952 | \$4,106,808,344 | \$67,378 |
| North Hanover Township | Burlington | 7,692 | \$439,168,881 | \$57,094 |

Effective Tax Rate

N.J. Department of Treasury, Division of Taxation 1994 - '11
 N.J. Department of Community Affairs 1980 - '93, 2002 - '11

- As property values decrease, effective tax rates continue to climb through 2010 and 2011 in the Pinelands, the Non-Pinelands, and state (increases of 13.1%, 10.9%, & 13.5%, respectively). However, the Pinelands remains roughly 10.8% lower than the Non-Pinelands and 7.4% lower than the state.



Description: The effective tax rate measures the ratio (expressed in hundredths) of taxes to property value. The effective tax rate is the rate at which the 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 are compiled at the municipal level and aggregated to allow for inside/outside the Pinelands, regional, and statewide analyses.

Summary of Previous Findings

Effective tax rates in all regions remained steady or increased slightly in the early 1980s before beginning a period of decline in 1986. Although statewide data were not available until 1987, statewide effective tax rates were below rates outside of the Pinelands, but surpassed rates inside of the Pinelands in 1991. Effective tax rates have gradually increased in all regions since the early 1990s and surpassed earlier highs set in the 1980s. Effective tax rates in the Pinelands continue to remain lower than all other regions of New Jersey. Rates began falling in 2001, began to slowly rise in 2008 and have continued to rise through 2011.

Update

In both 2010 and 2011, effective tax rates continued to rise across all regions. The Pinelands continue to have the lowest rate, followed by the state as a whole, southern New Jersey, and finally the Non-Pinelands with the highest rates. New Jersey posted an increase of 13.5% in effective tax rates, rising from 1.96 in 2009 to 2.22 in 2011. Effective tax rates rose 10.9% in the Non-Pinelands (from 2.08 to 2.31) and rose 13.1% in the Pinelands (from 1.82 to 2.06) over the same time period. The increase in effective tax rates is linked to a decrease in home sales prices and a corresponding decrease in equalized property valuation (see previous section). A detailed explanation of how effective tax rates are compiled and the synergy between home sales prices, equalized value, and effective tax rate can be found in the 2003 Annual Report.¹⁹

Studies have suggested that effective tax rates above 3.0 indicate municipal fiscal stress.²⁰ In 2011, two of the 53 municipalities with any amount of land in the Pinelands Area have a rate over 3.00 (Berlin Township and Egg Harbor City). With the rates increasing, six more municipalities are approaching this threshold, with rates exceeding 2.5 (Medford Lakes Borough, Winslow Township, Waterford Township, Chesilhurst Borough, Monroe Township, and Berlin Borough). An additional 18 municipalities have rates above 2.0. By contrast, the effective tax rates of 27 Pinelands municipalities are below 2.0. The effective tax rates in the Pinelands area range between 1.17 (Woodbine Borough) to 3.18 (Berlin Township).

¹⁹ For a more detailed explanation on effective tax rates, please consult the *2003 Annual Report*, Oct 2003, p. 57-58.

²⁰ See "The Property Tax Trouble Zone Moves Beyond Big Cities" by Coleman, *New Jersey Municipalities*, Dec 2002, p. 66-69.

Figure F3

Effective Tax Rates - 2011

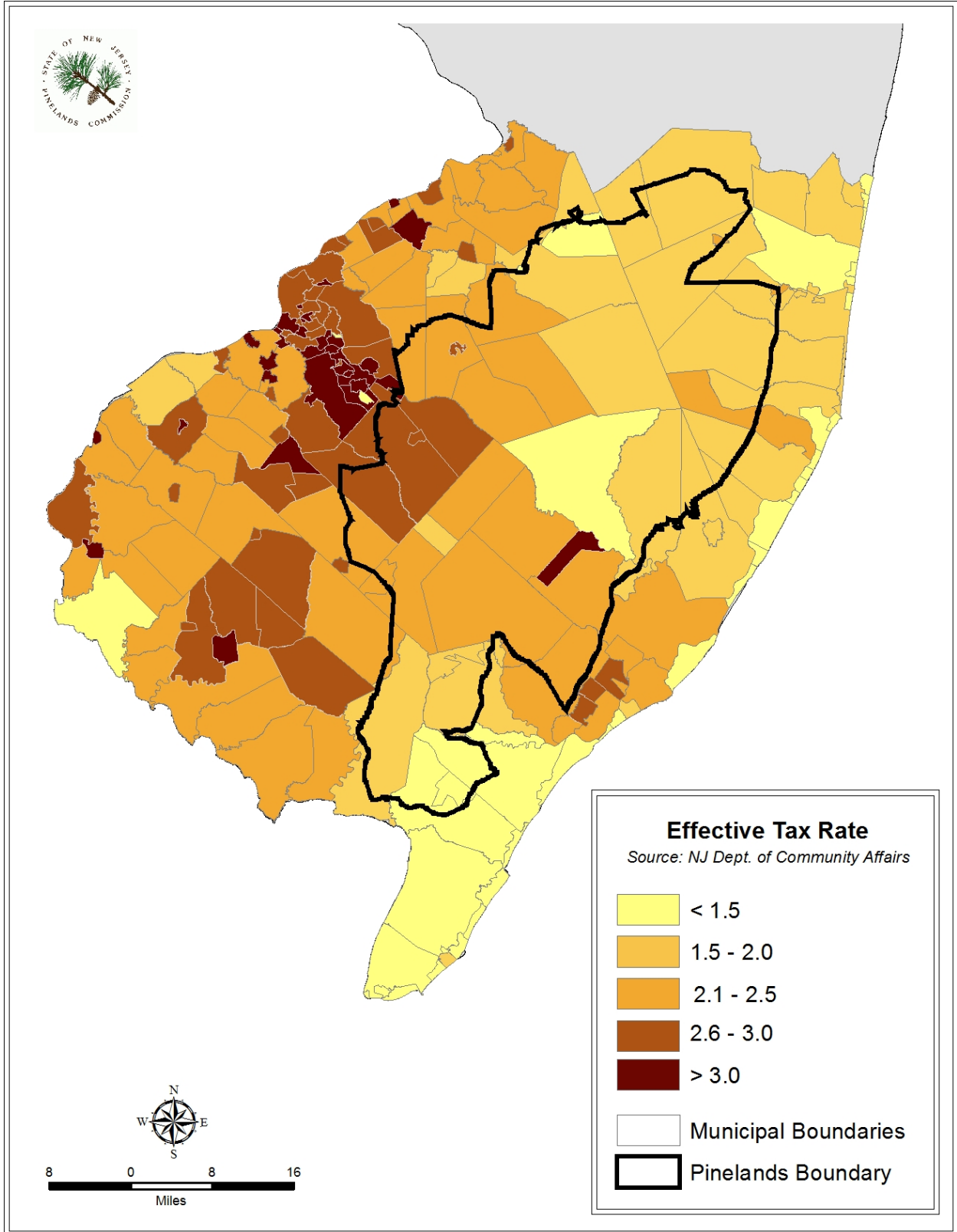


Table F3

Effective Tax Rates
(Sorted by 2011 Effective Tax Rate)

| Municipality | County | 2011 Effective Tax Rate | South N.J. Rank |
|---|------------|-------------------------|-----------------|
| Berlin Township | Camden | 3.18 | 25 |
| Egg Harbor City | Atlantic | 3.11 | 28 |
| Monroe Township | Gloucester | 2.94 | 36 |
| Chesilhurst Borough | Camden | 2.90 | 40 |
| Waterford Township | Camden | 2.81 | 47 |
| Winslow Township | Camden | 2.80 | 49 |
| Medford Lakes Borough | Burlington | 2.63 | 65 |
| Medford Township | Burlington | 2.49 | 80 |
| Buena Borough | Atlantic | 2.47 | 81 |
| Franklin Township | Gloucester | 2.47 | 82 |
| Evesham Township | Burlington | 2.39 | 91 |
| Egg Harbor Township | Atlantic | 2.37 | 94 |
| Hamilton Township | Atlantic | 2.32 | 103 |
| Shamong Township | Burlington | 2.21 | 110 |
| Tabernacle Township | Burlington | 2.20 | 111 |
| Barnegat Township | Ocean | 2.20 | 112 |
| Galloway Township | Atlantic | 2.16 | 116 |
| Southampton Township | Burlington | 2.15 | 117 |
| South Toms River Borough | Ocean | 2.11 | 120 |
| Buena Vista Township | Atlantic | 2.11 | 122 |
| Hammonton Town | Atlantic | 2.08 | 124 |
| Lakehurst Borough | Ocean | 2.07 | 125 |
| Mullica Township | Atlantic | 2.03 | 130 |
| Maurice River Township | Cumberland | 1.98 | 132 |
| Wrightstown Borough | Burlington | 1.98 | 134 |
| Pemberton Township | Burlington | 1.94 | 135 |
| Jackson Township | Ocean | 1.93 | 136 |
| Weymouth Township | Atlantic | 1.91 | 139 |
| Manchester Township | Ocean | 1.87 | 142 |
| Estell Manor City | Atlantic | 1.83 | 146 |
| Woodland Township | Burlington | 1.82 | 147 |
| Port Republic City | Atlantic | 1.81 | 148 |
| Stafford Township | Ocean | 1.81 | 149 |
| Little Egg Harbor Township | Ocean | 1.80 | 150 |
| Beachwood Borough | Ocean | 1.78 | 152 |
| Eagleswood Township | Ocean | 1.77 | 153 |
| Plumsted Township | Ocean | 1.72 | 156 |
| Berkeley Township | Ocean | 1.67 | 157 |
| Folsom Borough | Atlantic | 1.59 | 160 |
| Bass River Township | Burlington | 1.56 | 162 |
| Lacey Township | Ocean | 1.55 | 163 |
| Ocean Township | Ocean | 1.51 | 164 |
| New Hanover Township | Burlington | 1.47 | 170 |
| Washington Township | Burlington | 1.39 | 172 |
| Upper Township | Cape May | 1.35 | 173 |
| Dennis Township | Cape May | 1.33 | 175 |
| Woodbine Borough | Cape May | 1.17 | 180 |
| <i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | |
| Berlin Borough | Camden | 2.54 | 73 |
| Springfield Township | Burlington | 2.34 | 102 |
| Vineland City | Cumberland | 2.11 | 121 |
| North Hanover Township | Burlington | 1.73 | 155 |
| Toms River Township | Ocean | 1.49 | 166 |
| Corbin City | Atlantic | 1.31 | 178 |

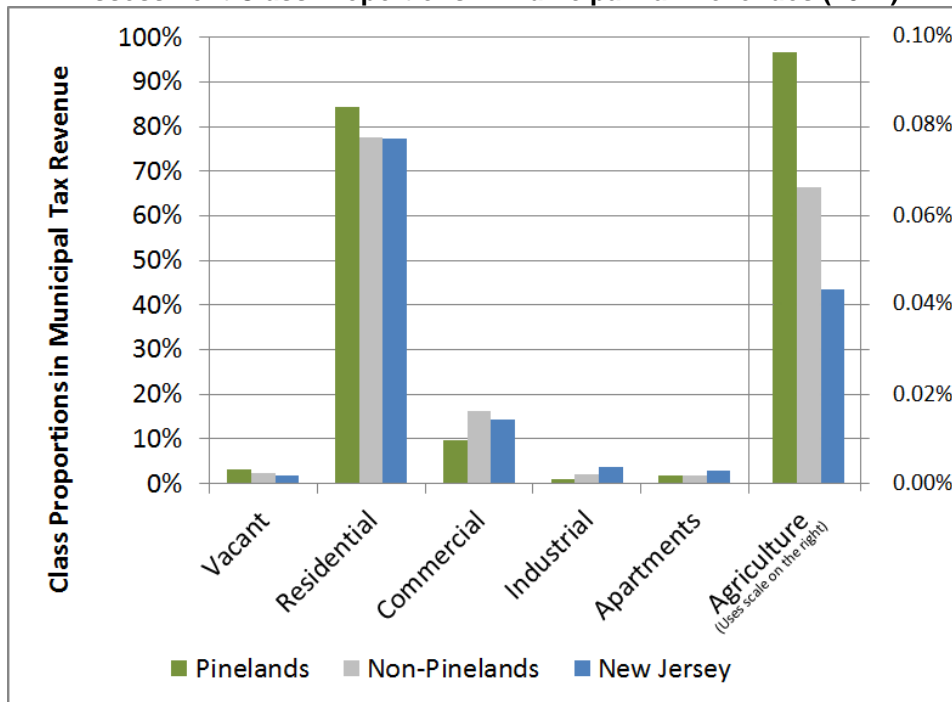
Assessment Class Proportions in Municipal Tax Revenue

N.J. Dept. of Comm. Affairs, Div. LGS 1980 – '94, 2002 - '11

X Updated

- The percentage of tax revenue from residential properties in the Pinelands continues to climb (up 3.2% from 2000) while the percentage from vacant properties dropped 1.7% from 2000.

Assessment Class Proportions in Municipal Tax Revenues (2011)



Description: The relative contribution of the different assessment classes (e.g., commercial, residential, and vacant land) to the tax revenue of each municipality measures the reliance of the municipality on different types of land uses for tax revenues.

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

Summary of Previous Findings

The Department of Community Affairs once again began compiling this data in 2004. Because a complete time series is still unavailable, this section examines changes in assessment class proportions using 10-year intervals. Since land-use changes of any magnitude evolve rather slowly, it is appropriate to look at changes during such larger periods as opposed to annual reviews.

While taxes from residential properties make up the bulk of tax revenue collected by the Pinelands, the Non-Pinelands, and state governments, the Pinelands receives a higher percentage of its total revenue from residential properties than Non-Pinelands and state governments. Vacant properties share a similar quality despite making up a much smaller proportion of tax revenue for the noted governments. A noticeable trend in the Pinelands is a percentage decrease in vacant property tax revenue and an increase in the residential category. Vacant land in the Pinelands comprised 10.1% of total assessed value in 1989, but dropped to 5.1% in 1999 and declined even further to 3.3% in 2009. Possible explanations include the development of vacant land, an increase in the value of developed land at a higher rate than that of vacant land, and/or a decrease in the value of vacant land. Meanwhile, the percent total of residential land increased from 70.7% in 1989, to 79.6% in 1999, to 83.0% in 2009. The percentage of assessment

in apartments and commercial land has remained relatively steady between 1989 and 2009, while the percentage of industrial and agricultural assessed value has decreased.

As of 2009, the Pinelands municipalities of Medford Lakes Borough, Beachwood Borough, Tabernacle Township, Ocean Township, Berkeley Township, Shamong Township, and Port Republic City have the highest percentage of assessed value in the residential category (above 90%) in the Pinelands. Wrightstown Borough and Berlin Township have the lowest percentage of assessed value in the residential category (below 60%).

Update

The Pinelands continues to have a slightly higher percentage of assessed property in vacant, residential, and agricultural categories than all other regions, and generally has lower percentages in the remaining categories compared to the other two regions. The predominant trend in the Pinelands is a gradual decrease in the vacant assessment category as a percentage of total assessment and a gradual increase in the residential category. Both trends are slowing. Vacant land revenue dropped from 4.9% in 2000 to 3.2% in 2011. Likewise, the percent of tax revenue from residential properties increased from 81% in 2000 to 84.2% in 2011. All other categories have decreased slightly in the period from 2000 to 2011, with commercial still remaining the second largest category at 9.7% (down from 10.8% in 2000).

Table F4a

Assessment Class Proportions in Municipal Valuations

| | 2000 | 2005 | 2011 | Change 2000 - 2011 |
|----------------------|-------|-------|-------|-----------------------|
| Pinelands | | | | |
| Vacant | 4.9% | 3.9% | 3.2% | -1.7% |
| Residential | 81.0% | 83.2% | 84.2% | 3.2% |
| Agriculture | 0.2% | 0.2% | 0.1% | -0.1% |
| Commercial | 10.8% | 10.1% | 9.7% | -1.1% |
| Industrial | 1.2% | 0.9% | 1.0% | -0.2% |
| Apartments | 1.9% | 1.8% | 1.9% | -0.1% |
| Non-Pinelands | | | | |
| Vacant | 2.7% | 2.8% | 2.3% | -0.3% |
| Residential | 73.3% | 77.6% | 77.5% | 4.2% |
| Agriculture | 0.1% | 0.1% | 0.1% | -0.1% |
| Commercial | 18.5% | 15.5% | 16.2% | -2.3% |
| Industrial | 3.1% | 2.2% | 2.2% | -1.0% |
| Apartments | 2.2% | 1.8% | 1.7% | -0.5% |
| State | | | | |
| Vacant | 2.6% | 2.2% | 1.9% | -0.7% |
| Residential | 73.3% | 75.6% | 77.2% | 3.9% |
| Agriculture | 0.1% | 0.1% | 0.0% | 0.0% |
| Commercial | 15.5% | 14.8% | 14.4% | -1.1% |
| Industrial | 5.7% | 4.6% | 3.7% | -2.0% |
| Apartments | 2.9% | 2.8% | 2.8% | -0.1% |

Table F4b 2011 Assessment Class Proportions for Pinelands Municipalities
(Sorted by % Residential)

| Municipality | County | Vacant | Residential | Agriculture | Commercial | Industrial | Apartments |
|---|-------------------|--------|-------------|-------------|------------|------------|------------|
| Medford Lakes Borough | Burlington County | 0.3% | 97.9% | 0.0% | 1.9% | 0.0% | 0.0% |
| Shamong Township | Burlington County | 1.1% | 96.1% | 0.6% | 1.9% | 0.3% | 0.0% |
| Tabernacle Township | Burlington County | 1.2% | 95.4% | 0.4% | 2.8% | 0.1% | 0.0% |
| Beachwood Borough | Ocean County | 1.7% | 94.9% | 0.0% | 3.3% | 0.0% | 0.2% |
| Port Republic City | Atlantic County | 2.8% | 93.9% | 0.1% | 3.3% | 0.0% | 0.0% |
| Little Egg Harbor Township | Ocean County | 4.2% | 90.5% | 0.0% | 5.1% | 0.0% | 0.1% |
| Ocean Township | Ocean County | 5.0% | 90.4% | 0.0% | 4.6% | 0.0% | 0.0% |
| Plumsted Township | Ocean County | 2.5% | 90.3% | 0.2% | 5.3% | 1.3% | 0.4% |
| Southampton Township | Burlington County | 1.6% | 90.0% | 0.9% | 6.6% | 0.9% | 0.0% |
| Pemberton Township | Burlington County | 1.9% | 89.5% | 0.4% | 5.8% | 0.2% | 2.2% |
| Berkeley Township | Ocean County | 2.6% | 89.5% | 0.0% | 6.3% | 0.5% | 1.1% |
| Waterford Township | Camden County | 2.3% | 89.4% | 0.3% | 7.2% | 0.3% | 0.5% |
| Mullica Township | Atlantic County | 4.7% | 88.8% | 0.8% | 5.0% | 0.6% | 0.2% |
| Winslow Township | Camden County | 2.0% | 88.5% | 0.2% | 6.4% | 1.1% | 1.8% |
| Franklin Township | Gloucester County | 2.9% | 88.3% | 0.7% | 7.8% | 0.0% | 0.2% |
| Medford Township | Burlington County | 1.0% | 88.2% | 0.2% | 8.4% | 0.5% | 1.7% |
| Barneгат Township | Ocean County | 5.1% | 87.1% | 0.0% | 6.1% | 0.3% | 1.5% |
| Estell Manor City | Atlantic County | 7.2% | 86.7% | 1.5% | 2.8% | 1.3% | 0.5% |
| Stafford Township | Ocean County | 2.8% | 86.6% | 0.0% | 10.4% | 0.0% | 0.1% |
| Jackson Township | Ocean County | 3.2% | 86.5% | 0.0% | 8.3% | 0.7% | 1.4% |
| Upper Township | Cape May County | 4.0% | 85.8% | 0.0% | 9.1% | 1.1% | 0.0% |
| Chesilhurst Borough | Camden County | 7.9% | 85.6% | 0.0% | 5.2% | 0.9% | 0.5% |
| Monroe Township | Gloucester County | 2.7% | 85.4% | 0.1% | 10.1% | 0.5% | 1.2% |
| Woodland Township | Burlington County | 5.1% | 85.3% | 0.6% | 3.5% | 5.4% | 0.0% |
| Lacey Township | Ocean County | 2.8% | 84.0% | 0.0% | 7.9% | 5.2% | 0.1% |
| South Toms River Borough | Ocean County | 2.0% | 83.9% | 0.0% | 14.0% | 0.1% | 0.0% |
| Buena Vista Township | Atlantic County | 5.4% | 83.6% | 0.4% | 8.6% | 2.0% | 0.1% |
| Weymouth Township | Atlantic County | 5.5% | 83.0% | 0.0% | 9.9% | 0.2% | 1.5% |
| Galloway Township | Atlantic County | 3.7% | 82.9% | 0.0% | 11.0% | 0.4% | 2.0% |
| Buena Borough | Atlantic County | 2.9% | 82.5% | 0.6% | 9.8% | 1.2% | 2.9% |
| Maurice River Township | Cumberland County | 7.8% | 82.5% | 0.6% | 6.4% | 2.4% | 0.2% |
| Lakehurst Borough | Ocean County | 1.9% | 82.4% | 0.0% | 15.4% | 0.0% | 0.3% |
| Washington Township | Burlington County | 3.2% | 81.6% | 1.3% | 12.1% | 1.7% | 0.0% |
| Dennis Township | Cape May County | 5.5% | 79.3% | 0.1% | 15.1% | 0.0% | 0.0% |
| Evesham Township | Burlington County | 0.6% | 79.0% | 0.0% | 15.1% | 0.6% | 4.7% |
| Egg Harbor City | Atlantic County | 2.3% | 78.8% | 0.0% | 14.3% | 2.3% | 2.3% |
| Bass River Township | Burlington County | 6.0% | 78.5% | 0.3% | 15.2% | 0.0% | 0.0% |
| Egg Harbor Township | Atlantic County | 4.4% | 77.5% | 0.0% | 16.6% | 1.1% | 0.3% |
| Woodbine Borough | Cape May County | 4.7% | 76.7% | 0.1% | 13.7% | 2.6% | 2.2% |
| Folsom Borough | Atlantic County | 3.9% | 76.5% | 0.2% | 7.9% | 11.5% | 0.0% |
| New Hanover Township | Burlington County | 2.5% | 76.3% | 1.0% | 20.1% | 0.1% | 0.0% |
| Hammonton Town | Atlantic County | 2.1% | 75.8% | 0.7% | 18.1% | 2.4% | 0.9% |
| Manchester Township | Ocean County | 4.5% | 75.3% | 0.0% | 8.8% | 0.7% | 10.7% |
| Eagleswood Township | Ocean County | 12.2% | 74.4% | 0.0% | 11.8% | 1.4% | 0.2% |
| Hamilton Township | Atlantic County | 5.1% | 68.2% | 0.1% | 21.1% | 1.1% | 4.5% |
| Berlin Township | Camden County | 3.0% | 52.7% | 0.0% | 34.1% | 9.1% | 1.1% |
| Wrightstown Borough | Burlington County | 3.1% | 49.7% | 0.0% | 34.4% | 0.9% | 11.8% |
| <i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | | |
| Springfield Township | Burlington County | 2.0% | 85.6% | 1.8% | 10.6% | 0.0% | 0.0% |
| Corbin City | Atlantic County | 4.9% | 84.8% | 0.3% | 9.9% | 0.0% | 0.0% |
| Toms River Township | Ocean County | 1.7% | 82.8% | 0.0% | 13.7% | 0.5% | 1.4% |
| North Hanover Township | Burlington County | 1.7% | 80.3% | 0.9% | 13.7% | 0.1% | 3.3% |
| Berlin Borough | Camden County | 2.6% | 79.1% | 0.0% | 15.9% | 1.4% | 1.1% |
| Vineland City | Cumberland County | 1.3% | 71.6% | 0.2% | 18.7% | 6.1% | 2.1% |

Local Municipal Purpose Revenues

N.J. Dept. of Community Affairs, Div. LGS 1980 – 2011
Individual S.J. County Tax Divisions 1995 - 1997

X Updated

- Municipal budgets decreased 5.4% in the Pinelands while the Non-Pinelands budget decreased 2.2% from their 2009 levels. Total municipal state aid also decreased during the same time period; 21.9% in the Pinelands and 20.8% in the Non-Pinelands.

| | Population | Local Municipal Budget* | Municipal Budget per Capita | State Aid | State Aid per Capita |
|-----------------------|------------|-------------------------|-----------------------------|---------------|----------------------|
| Pinelands in 2000 | 615,984 | \$476,656,345 | \$774 | \$128,000,180 | \$208 |
| Pinelands in 2011 | 699,235 | \$584,315,752 | \$836 | \$83,363,740 | \$119 |
| Change | 13.5% | 22.6% | 8.0% | -34.9% | -42.6% |
| Non-Pinelands in 2000 | 1,647,532 | \$1,885,544,424 | \$1,144 | \$387,663,227 | \$235 |
| Non-Pinelands in 2011 | 1,725,991 | \$2,294,245,542 | \$1,329 | \$229,763,764 | \$133 |
| Change | 4.8% | 21.7% | 16.1% | -40.7% | -43.4% |

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

Description: Per capita revenues provide insight into the level or amount of service a municipality can provide. Money budgeted for local municipal purposes is used for maintaining all services within a municipality other than schools or infrastructure maintained by the county or state (such as roads). Local municipal purpose monies are raised largely through property taxes. Miscellaneous revenues have been added to local purpose monies and include: surplus revenues apportioned, receipts from delinquent taxes and liens, and other miscellaneous revenues anticipated such as user or license fees. Per capita rates were calculated by using: intercensal estimates from 1995 to 1999, the 2000 Census, and municipal estimates for 2001 to 2009.

Unit of Analysis: Municipal level data are aggregated to allow for inside/outside the Pinelands analysis. Aggregates are sums, not averages.

Summary of Previous Findings

As a whole, the local municipal budgets of the Pinelands municipalities increased faster than the Non-Pinelands from 1995 to 2006. The average Pinelands municipal budget increased by 26% during this period, compared to 18% for the Non-Pinelands. Within the local budget, monies raised through local municipal purposes increased substantially (by 71% in the Pinelands and 32% in the Non-Pinelands). Monies raised through miscellaneous revenues increased slightly in the Pinelands (+4%) while the Non-Pinelands enjoyed an increase of 6% during the same time frame. Total municipal budgets continued to increase in both the Pinelands (5.7%) and the Non-Pinelands (7.0%) areas from 2007 to 2009 over their 2006 budgets.

While municipal revenues increased both inside and outside the Pinelands from 1995 to 2006, the amount of revenue collected per person has risen only modestly. As a whole, the Pinelands municipalities collected \$740 in municipal revenues per capita in 1995 and \$799 per capita in 2006, an increase of 8.0%. The Non-Pinelands municipalities collected \$1,082 per capita in 1995 versus \$1,189 in 2006, an increase of 9.8%. The increase in revenues corresponds with population increases. As the population increases, the ability and need to raise additional revenues increases. Per capita revenues have remained rather constant, as additional citizens require additional services, which require additional expenditures. It is interesting to note that the increase in per capita revenues has not been consistent over time. Per capita revenues declined slightly in both the Pinelands and the Non-Pinelands from 1995 through 2001. Per Capita revenues did not surpass 1995 levels until 2002 in the Non-Pinelands and 2003 in the Pinelands (Table F5a).

From 1995 to 2006, the Pinelands municipalities collected approximately \$360 less per person annually compared to the Non-Pinelands. This difference is due to the fact that the Pinelands have lower tax rates than the Non-Pinelands and because the Pinelands municipalities tend to offer less in terms of municipal services. For example, the percentage of the Pinelands municipalities that have no local police force is about twice that of the Non-Pinelands municipalities (30% in the Pinelands vs. 15% in the Non-Pinelands).

Municipalities also rely on the state for aid to supplement local revenues. From 1999 to 2006, state aid decreased by 9% to the Pinelands municipalities and by 8% to the Non-Pinelands municipalities. Per capita rates decreased by 19% in the Pinelands and 13% in the Non-Pinelands. While there is quite a gulf between the Pinelands and the Non-Pinelands municipalities in terms of municipal revenues per capita, the difference between the regions is much smaller in relation to the amount of state aid per capita. The Non-Pinelands region received 17% more in aid per capita than did the Pinelands area in 2006.

There has been a large degree of variation among the Pinelands municipalities in terms of local municipal revenues and state aid. Between 1995 and 2006, municipal revenues ranged from a high of approximately \$2,800 to a low of \$220 in the Pinelands. Similarly, state aid figures in the Pinelands have ranged from a high of approximately \$700 to a low of \$80 annually during the period.

When per capita revenues and per capita state aid are viewed as averages (average per capita figures for all municipalities within a region, as opposed to a per capita figure for the entire region), different patterns emerge. When compared as regions, the Pinelands has had lower per capita revenue and received slightly less state aid per capita than the Non-Pinelands. When municipal averages for each of the aggregates are compared, the Pinelands has had substantially lower per capita revenue and received more state aid per capita compared to the Non-Pinelands over the period 1995 to 2006. With per capita budgets nearly 60% higher in the Non-Pinelands than the Pinelands (coupled with proportionally changing effective tax rates inside and outside the Pinelands), ratables are seen growing faster in the Non-Pinelands.

The total municipal budgets for the Non-Pinelands and the Pinelands municipalities both decreased by 5% in 2009. This is trailing an approximately 20% increase in total municipal budgets for the Non-Pinelands and the Pinelands municipalities the previous year. When examined on a per capita basis, the Non-Pinelands municipal budgets are 53% higher than those in the Pinelands (\$1,260 in the Non-Pinelands versus \$822 in the Pinelands).

Total municipal state aid decreased 4% in the Pinelands while falling by 6% in the Non-Pinelands in 2009. Since 2000, municipal budgets in the Pinelands have increased by 20% while budgets in the Non-Pinelands have increased by 17%. Over the same period, state aid has been cut by 17% for the Pinelands municipalities and by 23% for the Non-Pinelands municipalities.

Among the Pinelands municipalities, there were six who have budgets per capita over \$1,500: Woodland Township, Woodbine Borough, Egg Harbor City, Chesilhurst Borough, Washington Township, and Wrightstown Borough. In contrast, five Pinelands municipalities have budgets per capita less than \$500: New Hanover Township, Shamong Township, Plumsted Township, Maurice River Township, and Tabernacle Township.

Update

The total municipal budgets for the Non-Pinelands increased by 0.6% in 2010 and then fell by 2.8% in 2011. Conversely, the total municipal budgets for the Pinelands municipalities declined both years, first by 1.8% and then by 3.7%. Municipal budget per capita followed similarly: the Non-Pinelands first rose slightly by 1% and then declined by 2.9%. The Pinelands declined both years, 3.1% in the first year and 3.8% in the second. When examined on a per capita basis, the Non-Pinelands municipal budgets are still 59.1% *higher* than those of the Pinelands (\$1,329 versus \$836).

Total state aid continued to decline from 2009 to 2011; down 21.9% in the Pinelands and 20.8% in the Non-Pinelands. Aid per capita continues to be higher outside (\$133 per capita) than inside (\$119) the Pinelands in 2011.

From 2000 to 2011, municipal budgets have risen both inside and outside the Pinelands by about the same amount (22.6% and 21.7%, respectively). Conversely, overall state aid is continuing to slide, with a 41% reduction outside and 35% reduction inside the Pinelands. However, because population growth inside the Pinelands area is exceeding that of the Non-Pinelands area, state aid per capita is reduced by 43% in *both* areas.

Among the Pinelands municipalities, four have a budget over \$1,500 per capita: Wrightstown Borough, Washington Township, Egg Harbor City, and Chesilhurst Borough. In 2009, Woodland Township and Woodbine Borough also held a budget of more than \$1,500 per capita, but have since declined to a budget of under \$1,000 per capita. In contrast, six municipalities have budgets of less than \$500 per capita: Plumsted Township, Maurice River Township, Tabernacle Township, Shamong Township, and New Hanover Township.

Table F5a

**Local Municipal Purpose Revenues and State Aid
(Adjusted to 2011 Dollars)**

| Region | Year | Population | Local Municipal Purpose Revenue | Miscellaneous Revenues | Total Municipal Budget | Municipal Budget per Capita | Total State Aid | State Aid per Capita |
|---------------|------|------------|---------------------------------|------------------------|------------------------|-----------------------------|-----------------|----------------------|
| Pinelands | 1998 | 597,454 | \$172,387,120 | \$301,477,694 | \$473,864,814 | \$793 | \$135,736,922 | \$227 |
| Pinelands | 1999 | 610,785 | \$180,308,654 | \$294,863,035 | \$475,171,689 | \$778 | \$132,542,662 | \$217 |
| Pinelands | 2000 | 615,984 | \$183,785,342 | \$292,871,004 | \$476,656,345 | \$774 | \$128,000,180 | \$208 |
| Pinelands | 2001 | 629,560 | \$198,013,887 | \$299,973,348 | \$497,987,235 | \$791 | \$132,296,594 | \$210 |
| Pinelands | 2002 | 642,531 | \$206,032,119 | \$303,171,996 | \$509,204,115 | \$792 | \$129,305,223 | \$201 |
| Pinelands | 2003 | 655,872 | \$220,147,640 | \$299,562,905 | \$519,710,544 | \$792 | \$127,165,042 | \$194 |
| Pinelands | 2004 | 667,098 | \$234,712,759 | \$300,304,907 | \$535,017,666 | \$802 | \$125,095,114 | \$188 |
| Pinelands | 2005 | 673,643 | \$248,374,277 | \$313,390,630 | \$561,764,907 | \$834 | \$121,520,124 | \$180 |
| Pinelands | 2006 | 680,259 | \$267,962,669 | \$316,892,600 | \$584,855,269 | \$860 | \$117,722,617 | \$173 |
| Pinelands | 2007 | 683,253 | \$285,594,733 | \$318,204,288 | \$603,799,021 | \$884 | \$116,614,474 | \$171 |
| Pinelands | 2008 | 685,852 | \$305,047,581 | \$302,624,516 | \$607,672,097 | \$886 | \$109,033,834 | \$159 |
| Pinelands | 2009 | 688,972 | \$325,045,138 | \$292,930,098 | \$617,975,236 | \$897 | \$106,672,051 | \$155 |
| Pinelands | 2010 | 698,092 | \$340,381,297 | \$266,172,352 | \$606,553,649 | \$869 | \$87,648,523 | \$126 |
| Pinelands | 2011 | 699,235 | \$346,121,599 | \$238,194,153 | \$584,315,752 | \$836 | \$83,363,740 | \$119 |
| Non-Pinelands | 1998 | 1,622,388 | \$858,947,968 | \$1,022,878,316 | \$1,881,826,284 | \$1,160 | \$383,965,005 | \$237 |
| Non-Pinelands | 1999 | 1,639,053 | \$876,808,595 | \$1,001,016,609 | \$1,877,825,204 | \$1,146 | \$394,836,692 | \$241 |
| Non-Pinelands | 2000 | 1,647,532 | \$875,929,402 | \$1,009,615,022 | \$1,885,544,424 | \$1,144 | \$387,663,227 | \$235 |
| Non-Pinelands | 2001 | 1,658,231 | \$873,519,924 | \$1,010,827,133 | \$1,884,347,057 | \$1,136 | \$388,862,145 | \$235 |
| Non-Pinelands | 2002 | 1,675,385 | \$920,501,821 | \$1,028,656,814 | \$1,949,158,634 | \$1,163 | \$380,061,326 | \$227 |
| Non-Pinelands | 2003 | 1,687,303 | \$961,617,128 | \$1,025,398,205 | \$1,987,015,334 | \$1,178 | \$373,400,857 | \$221 |
| Non-Pinelands | 2004 | 1,697,547 | \$1,003,283,185 | \$1,078,400,326 | \$2,081,683,512 | \$1,226 | \$357,455,292 | \$211 |
| Non-Pinelands | 2005 | 1,705,814 | \$1,064,278,978 | \$1,122,388,897 | \$2,186,667,875 | \$1,282 | \$346,253,087 | \$203 |
| Non-Pinelands | 2006 | 1,714,251 | \$1,119,962,524 | \$1,070,987,266 | \$2,190,949,790 | \$1,278 | \$337,978,487 | \$197 |
| Non-Pinelands | 2007 | 1,720,229 | \$1,164,658,664 | \$1,090,254,161 | \$2,254,912,825 | \$1,311 | \$340,041,759 | \$198 |
| Non-Pinelands | 2008 | 1,725,266 | \$1,247,248,873 | \$1,090,614,976 | \$2,337,863,849 | \$1,355 | \$294,421,073 | \$171 |
| Non-Pinelands | 2009 | 1,730,503 | \$1,329,923,692 | \$1,014,751,607 | \$2,344,675,298 | \$1,355 | \$290,194,652 | \$168 |
| Non-Pinelands | 2010 | 1,723,949 | \$1,392,835,882 | \$966,331,267 | \$2,359,167,150 | \$1,368 | \$237,478,616 | \$138 |
| Non-Pinelands | 2011 | 1,725,991 | \$1,373,660,223 | \$920,585,319 | \$2,294,245,542 | \$1,329 | \$229,763,764 | \$133 |

Table F5b 2011 Municipal Purpose Revenues and State Aid by Municipality

| Municipality | County | Population Estimate (2011) | Municipal Budget | Municipal Budget per Capita | State Aid | State Aid per Capita |
|---|------------|----------------------------|------------------|-----------------------------|--------------|----------------------|
| Wrightstown Borough | Burlington | 804 | \$1,706,534 | \$2,123 | \$412,067 | \$513 |
| Washington Township | Burlington | 689 | \$1,395,069 | \$2,025 | \$817,007 | \$1,186 |
| Egg Harbor City | Atlantic | 4,240 | \$6,516,341 | \$1,537 | \$473,461 | \$112 |
| Chesilhurst Borough | Camden | 1,633 | \$2,501,464 | \$1,532 | \$676,340 | \$414 |
| Berlin Township | Camden | 5,353 | \$7,990,720 | \$1,493 | \$1,287,847 | \$241 |
| Stafford Township | Ocean | 26,665 | \$38,938,113 | \$1,460 | \$2,606,872 | \$98 |
| Lakehurst Borough | Ocean | 2,668 | \$3,666,258 | \$1,374 | \$295,439 | \$111 |
| Ocean Township | Ocean | 8,372 | \$9,915,235 | \$1,184 | \$606,801 | \$72 |
| Eagleswood Township | Ocean | 1,610 | \$1,895,000 | \$1,177 | \$203,363 | \$126 |
| Bass River Township | Burlington | 1,447 | \$1,573,060 | \$1,087 | \$304,290 | \$210 |
| Medford Lakes Borough | Burlington | 4,153 | \$4,261,501 | \$1,026 | \$289,600 | \$70 |
| South Toms River Borough | Ocean | 3,701 | \$3,779,946 | \$1,021 | \$330,995 | \$89 |
| Port Republic City | Atlantic | 1,113 | \$1,127,870 | \$1,013 | \$176,307 | \$158 |
| Hamilton Township | Atlantic | 26,483 | \$26,325,271 | \$994 | \$2,841,043 | \$107 |
| Woodbine Borough | Cape May | 2,459 | \$2,421,056 | \$985 | \$289,537 | \$118 |
| Woodland Township | Burlington | 1,790 | \$1,752,455 | \$979 | \$628,559 | \$351 |
| Barneget Township | Ocean | 21,037 | \$20,546,882 | \$977 | \$1,048,932 | \$50 |
| Little Egg Harbor Township | Ocean | 20,162 | \$19,410,702 | \$963 | \$1,449,056 | \$72 |
| Medford Township | Burlington | 23,077 | \$21,870,040 | \$948 | \$1,991,135 | \$86 |
| Upper Township | Cape May | 12,286 | \$11,509,550 | \$937 | \$6,323,653 | \$515 |
| Berkeley Township | Ocean | 41,455 | \$38,732,422 | \$934 | \$4,256,465 | \$103 |
| Lacey Township | Ocean | 27,781 | \$25,926,556 | \$933 | \$11,273,840 | \$406 |
| Waterford Township | Camden | 10,641 | \$9,611,049 | \$903 | \$1,304,676 | \$123 |
| Monroe Township | Gloucester | 36,232 | \$32,660,180 | \$901 | \$4,035,796 | \$111 |
| Mullica Township | Atlantic | 6,144 | \$5,303,172 | \$863 | \$493,216 | \$80 |
| Hammonton Town | Atlantic | 14,779 | \$12,447,262 | \$842 | \$1,272,714 | \$86 |
| Beachwood Borough | Ocean | 11,099 | \$9,310,157 | \$839 | \$664,673 | \$60 |
| Egg Harbor Township | Atlantic | 43,288 | \$35,661,697 | \$824 | \$6,039,065 | \$140 |
| Pemberton Township | Burlington | 27,966 | \$23,036,340 | \$824 | \$3,018,097 | \$108 |
| Buena Borough | Atlantic | 4,600 | \$3,787,842 | \$823 | \$419,272 | \$91 |
| Dennis Township | Cape May | 6,422 | \$5,108,690 | \$795 | \$1,643,523 | \$256 |
| Winslow Township | Camden | 39,466 | \$29,647,259 | \$751 | \$6,050,378 | \$153 |
| Evesham Township | Burlington | 45,624 | \$32,647,763 | \$716 | \$3,164,693 | \$69 |
| Manchester Township | Ocean | 43,278 | \$30,665,916 | \$709 | \$3,217,467 | \$74 |
| Jackson Township | Ocean | 55,129 | \$38,724,230 | \$702 | \$3,408,439 | \$62 |
| Estell Manor City | Atlantic | 1,734 | \$1,131,428 | \$652 | \$316,382 | \$182 |
| Folsom Borough | Atlantic | 1,884 | \$1,178,100 | \$625 | \$186,082 | \$99 |
| Galloway Township | Atlantic | 37,322 | \$23,126,081 | \$620 | \$2,581,284 | \$69 |
| Franklin Township | Gloucester | 16,869 | \$10,435,958 | \$619 | \$1,451,704 | \$86 |
| Weymouth Township | Atlantic | 2,712 | \$1,649,820 | \$608 | \$281,895 | \$104 |
| Southampton Township | Burlington | 10,484 | \$5,892,492 | \$562 | \$1,105,861 | \$105 |
| Buena Vista Township | Atlantic | 7,564 | \$4,246,660 | \$561 | \$716,567 | \$95 |
| Tabernacle Township | Burlington | 6,992 | \$3,292,549 | \$471 | \$630,161 | \$90 |
| Maurice River Township | Cumberland | 7,696 | \$3,313,169 | \$431 | \$850,305 | \$110 |
| Shamong Township | Burlington | 6,473 | \$2,614,209 | \$404 | \$582,995 | \$90 |
| Plumsted Township | Ocean | 8,463 | \$3,039,684 | \$359 | \$452,322 | \$53 |
| New Hanover Township | Burlington | 7,396 | \$2,022,001 | \$273 | \$893,564 | \$121 |
| <i>"Outside" Municipalities (less than 10% of total area in Pinelands boundary)</i> | | | | | | |
| Corbin City | Atlantic | 491 | \$548,560 | \$1,117 | \$102,127 | \$208 |
| Springfield Township | Burlington | 3,420 | \$3,721,074 | \$1,088 | \$426,607 | \$125 |
| Toms River Township | Ocean | 91,680 | \$98,220,355 | \$1,071 | \$8,492,807 | \$93 |
| Vineland City | Cumberland | 60,952 | \$59,249,602 | \$972 | \$6,190,788 | \$102 |
| Berlin Borough | Camden | 7,583 | \$6,998,200 | \$923 | \$696,697 | \$92 |
| North Hanover Township | Burlington | 7,692 | \$3,505,005 | \$456 | \$765,714 | \$100 |

* Municipal budget = Local Municipal Purpose Revenues + Miscellaneous Revenue

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Appendix B. Previous Special Studies

Value-Added Blueberry Products Study

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

Housing Task Force Study

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

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

Pinelands Development Credit Supply & Demand Study

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

Since the PDC program is market-driven, its ultimate success depends upon a healthy balance between supply and demand pressures in the land development market in the Pinelands.

Initially, the PDC program was slow to be utilized by both developers and land owners in the region. However, in recent years there has been quite a bit of activity in the PDC market, with the price of a development right rising from an initial value of \$2,500 in 1981 to a high of \$40,000 in 2006. Prices fell during 2009; the mean sales price for a development right in 2009 was just over \$15,000.

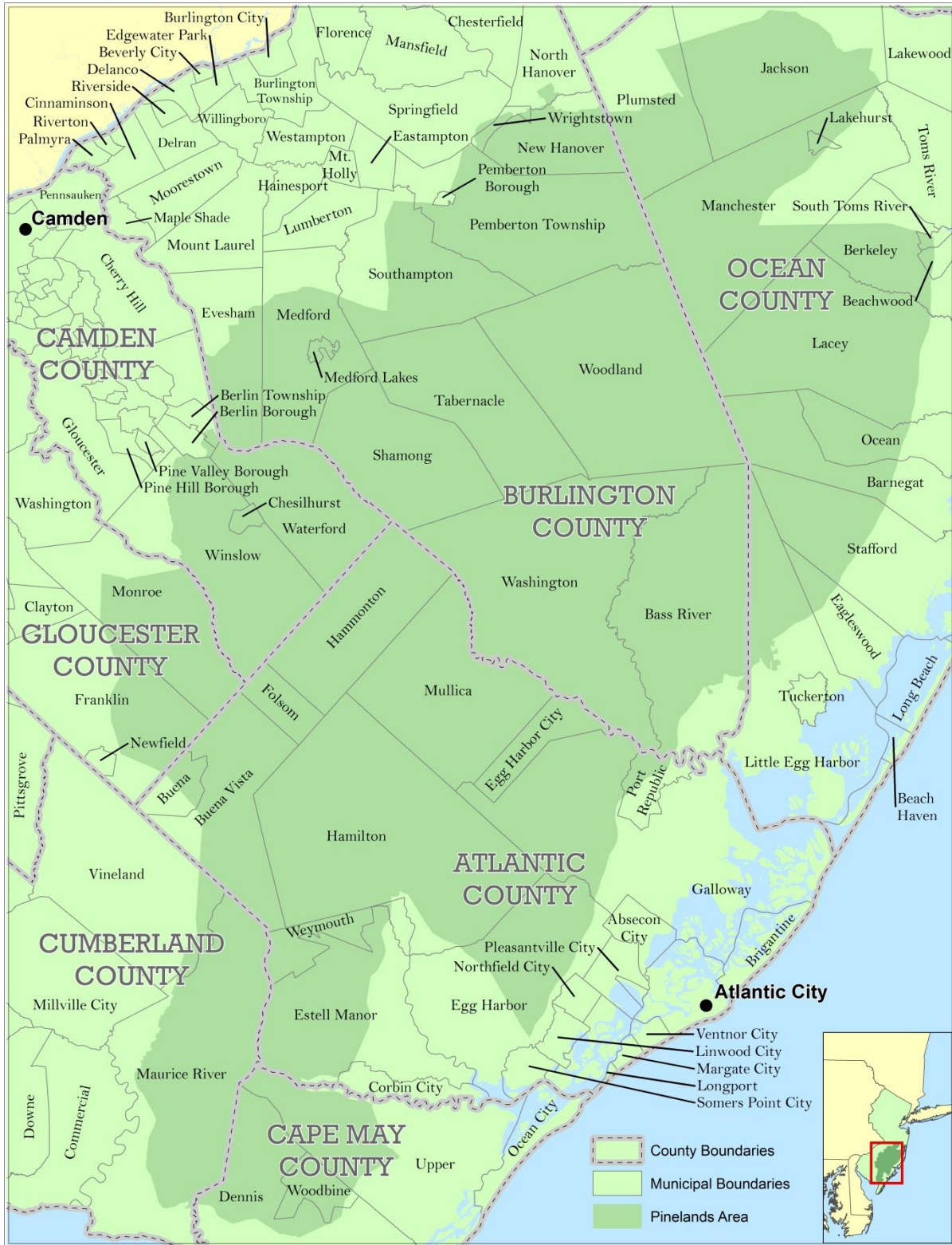
This study is a comprehensive review of what has worked well to this point, in addition to examining new ideas on how further to stimulate use of PDCs in the coming years. A preliminary package of recommendations was submitted to the Policy and Implementation Committee in the summer of 2007. Further review of a final set of policies and rules has been delayed, but the Commission will likely be re-examining these in FY 2012.

Appendix C. Pinelands and Non-Pinelands Acreage by County

| County | Total Acreage | Acreage Inside Pinelands | Acreage Outside Pinelands | % Area in Pinelands | % of Pinelands contributed to by County | % of Southern N.J. contributed to by County |
|------------|---------------|--------------------------|---------------------------|---------------------|---|---|
| Atlantic | 391,134 | 247,877 | 143,257 | 63.4% | 26.4% | 17.3% |
| Burlington | 524,166 | 334,187 | 189,979 | 63.8% | 35.6% | 23.1% |
| Camden | 145,593 | 54,915 | 90,678 | 37.7% | 5.9% | 6.4% |
| Cape May | 182,633 | 34,807 | 147,826 | 19.1% | 3.7% | 8.1% |
| Cumberland | 321,645 | 45,356 | 276,289 | 14.1% | 4.8% | 14.2% |
| Gloucester | 215,616 | 33,580 | 182,036 | 15.6% | 3.6% | 9.5% |
| Ocean | 485,569 | 187,490 | 298,079 | 38.6% | 20.0% | 21.4% |
| Total | 2,266,357 | 938,212 | 1,328,145 | 41.4% | 100.0% | 100.0% |

Source: NJ DEP Land Use / Land Cover data 1995/97

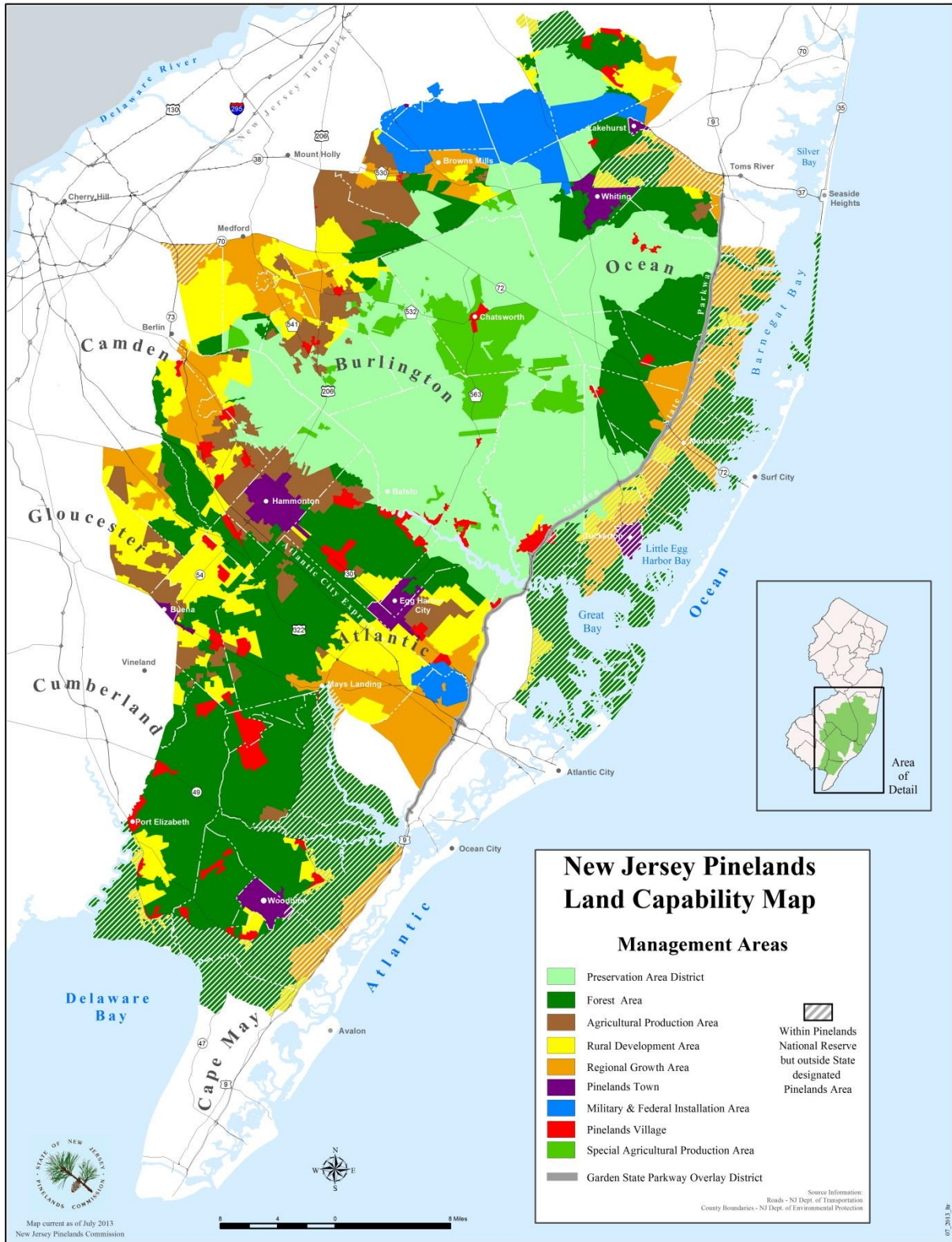
Appendix D. Municipalities of the New Jersey Pinelands



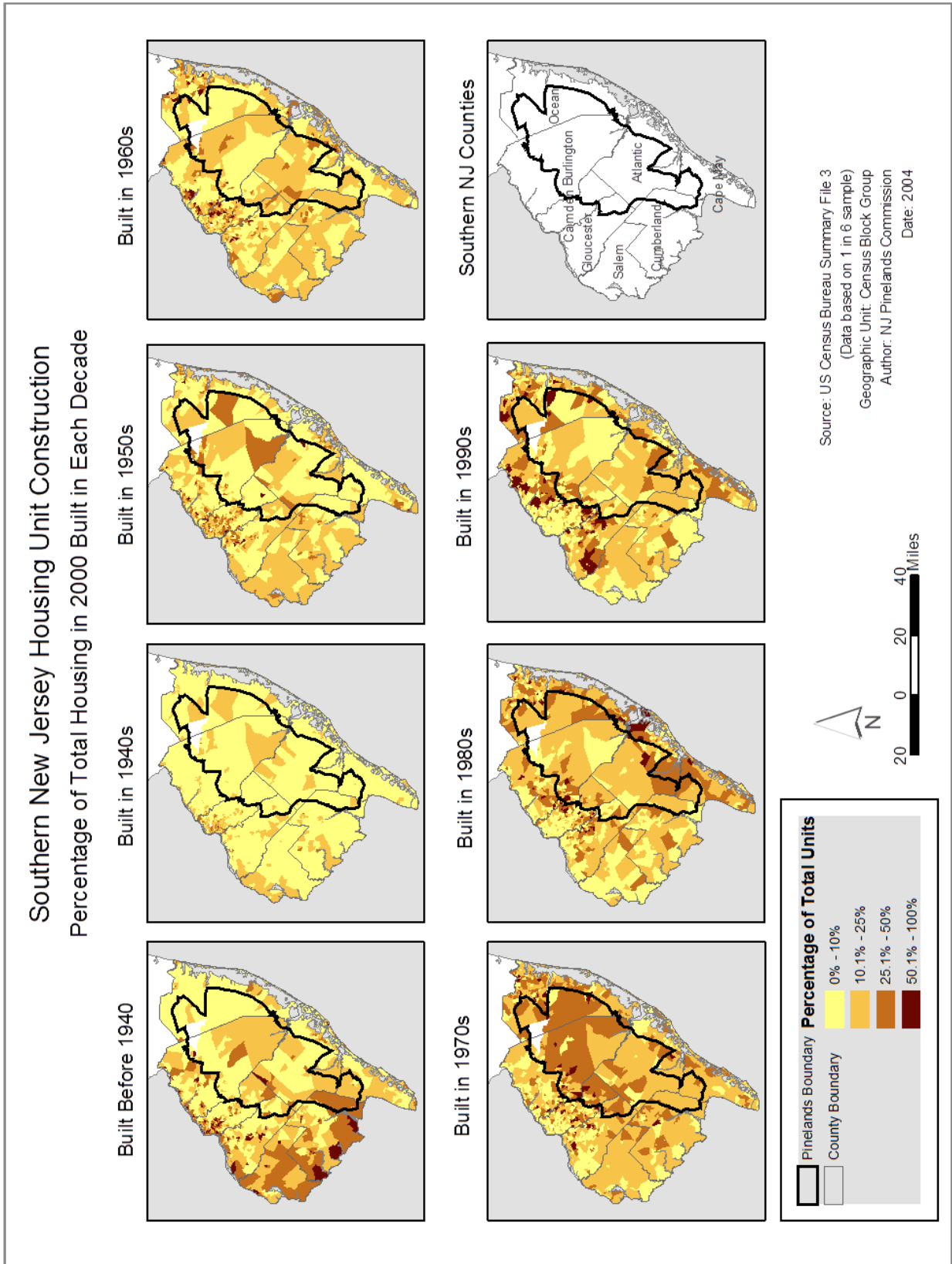
Appendix E. Pinelands Management Areas

| Management Areas | Description | Permitted Uses | |
|--|---|---|--|
| | | Residential | Non-residential |
| Preservation Area District | Core of the Pinelands environment and the most critical ecological region; a large, contiguous wilderness area of forest which supports diverse plant and animal communities, many of which are threatened and endangered species. | None except 1 acre lots in designated infill areas | Limited commercial uses in designated infill areas |
| Special Agricultural Production Area | Discrete areas within the Preservation Area primarily used for berry agriculture and horticulture of plants native to the Pinelands. | Farm-related housing on 40 acres | Expansion of existing uses only |
| Forest Area | Similar to the Preservation Area District in terms of ecological value; a largely undeveloped area which is an essential element of the Pinelands environment, contains high quality water resources and wetlands and provides suitable habitat for many threatened and endangered species. | 5 acre minimum. Historical development average has been 1 unit per 28 acres | Roadside retail within 300 feet of pre-existing use |
| Agricultural Production Area | Areas of active agricultural use, generally upland field agriculture and row crops, together with adjacent areas with soils suitable for expansion of agricultural operations. | Farm-related housing on 10 acres, non-farm housing on 40 acres | Agricultural commercial; roadside retail within 300 feet of pre-existing use |
| Rural Development Area | Areas which are slightly modified and suitable for limited future development; represents a balance of environmental and development values that is intermediate between Forest Areas and existing growth areas. | Historical development average has been 1 unit per 5 acres | Small scale community commercial and light industrial uses on septic systems |
| Pinelands Village | Small, existing, spatially discrete settlements which are appropriate for infill residential, commercial, and industrial development compatible with their existing character. | 1 to 5 acre lots if not sewered | Commercial and industrial uses compatible with existing character |
| Pinelands Town | Large, existing spatially discrete settlements. | 2 to 4 homes per acre with sewers | Commercial and industrial uses |
| Regional Growth Area | Areas of existing growth and adjacent lands capable of accommodating regional growth influences while protecting the essential character and environment of the Pinelands | 2 to 4 homes per acre with sewers | Commercial and industrial uses |
| Military and Federal Installation Area | Federal enclaves within the Pinelands. | Not Applicable | Uses associated with function of the installation or other public purpose uses |

Appendix F. Pinelands Management Area Map



Appendix G. Southern New Jersey Housing Unit Construction



Appendix H. Municipal Fact Book

Introduction

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

The Long-Term Economic Monitoring Program Annual Report has traditionally focused on aggregate trends, with the intent of comparing the economic performance between the Pinelands and the Non-Pinelands regions of southern New Jersey. Maps and tables displaying data for each of the Pinelands municipalities were introduced in 2001 in order to gain a better understanding of how places within the Pinelands compare economically. The Municipal Fact Book was introduced in 2002 to take this concept further by presenting data by municipality, rather than by variable. This arrangement provides a summary of economic conditions in each municipality, while placing each municipality in a broader context by displaying average values for southern New Jersey and municipal ranks for each variable. The 2003 Fact Book was an enhanced version with additional data, including maps and charts for each municipality. In the 2004 Report, the sheets were expanded to include county level data for each of the eight southern New Jersey counties. This year's report retains the same format as last year's fact book. Each fact sheet contains four distinct parts: introductory information, development area map, population trends, and data table.

Introductory Information

Data for fifty-three 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 percentage of population, housing units, and municipal area within the Pinelands Area boundary is provided, followed by the actual number of residents, units, and acres in parentheses. Population and housing units for areas inside and outside the Pinelands Area were calculated using census block data.

Development Area Map

The Long-Term Economic Monitoring Program classifies all municipalities with at least 10% of their land in the Pinelands Area as Pinelands municipalities for purposes of comparison against Non-Pinelands municipalities. A limitation inherent in this classification is the inclusion of areas that are in the Pinelands municipalities, but are actually outside the Pinelands boundary. In some instances, this system does not accurately represent phenomena occurring within the Pinelands, because growth may occur within a Pinelands municipality, but outside the Pinelands Area boundary. Obtaining sub-municipal data to differentiate between areas inside and outside the Pinelands Area boundary is a possible solution, but is often not feasible due to lack of data.

The municipal development map is a tool that can be used to gauge where development is and where it can occur, by consolidating various zoning areas inside and outside the Pinelands Area. Eight of the Pinelands Management Areas were condensed into three zones for the purpose of simpler visual representation: conservation areas where limited development can

occur, intermediate areas that act as buffer zones where moderate/rural type growth is permitted, and development areas where sewers are allowed and growth is encouraged. State Planning Areas were grouped with comparable Management Areas in terms of allowable density and use, and divided into the same three categories. The classification scheme is shown in the following table:

| General Categories | Pinelands Management Areas | State Planning Areas ²¹ |
|--------------------|---------------------------------|------------------------------------|
| Conservation | Preservation | Rural (PA4) |
| | Forest | Rural Enviro Sensitive (PA4B) |
| | Agricultural Production | Enviro Sensitive (PA5) |
| | Special Agricultural Production | Enviro Sens Barrier Islands (PA5B) |
| Intermediate | Rural Development | Fringe (PA3) |
| Development | Regional Growth | Metropolitan (PA1) |
| | Pinelands Town | Suburban (PA2) |
| | Pinelands Village | Designated Centers |
| Military/Federal | Military/Federal | Military/Federal |

Based on these development maps and census block data, suppositions can be made regarding the location of certain phenomena. For example, Little Egg Harbor Township is classified as a Pinelands Municipality, with 23% of its area inside the Pinelands Area. The township issued 55 building permits in 2009, and ranked 27th in southern New Jersey for the number of building permits issued. Is this growth occurring in the Pinelands Area? The census block data indicates that only 1% of the townships' residents and housing units are inside the Pinelands Area boundary. The development map reveals that the area inside the Pinelands Area is classified as a conservation area, while a large area outside the boundary is classified as a development area. Based on this information, it can be inferred that most development in Little Egg Harbor Township is occurring outside the Pinelands Area boundary.

It is important to note that these zones indicate where growth can occur, but do not necessarily indicate where development currently exists. An area may be zoned as regional growth in the development category, but could still be undeveloped (e.g. either because it is not sewered or land is publicly owned). Furthermore, the classification of areas is subject to change. The State Planning Areas were selected to represent development areas outside the Pinelands Area. If these classifications change, the maps will change accordingly. Pinelands Management Areas change designation infrequently.

Population Changes (1980 to 2010)

The recent release of the 23rd Census makes it appropriate to include a chart of the latest population figures and changes from 1980 to 2010. These population figures are derived from municipal-level census data collected every ten years. Monitoring population levels are useful for anticipating demand of housing and services as well as tracking sources of potential revenue. It should be noted that the population charted is that of the entire municipality and not just the areas located within Pineland Area boundaries.

²¹ For more information regarding State Planning Areas, please consult *The New Jersey State Development and Redevelopment Plan*

Data Table

The data table begins with the percentages of municipal Pinelands area classified in each Pinelands Management Area. The boxes are color coded to correspond to the larger data categories in the development area map: conservation, intermediate, and development.

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. Variables tracked include: population, population density, population change 2000 to 2010, land area, 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, effective tax rate, average residential property tax bill, per capita income, and 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 last line of information indicates the percentage of assessed value derived from each land use category.

General Caveats

- **Ranking Values.** It is important to note that a high rank does not necessarily have a positive connotation. A high rank for per capita income has a positive connotation, while a high rank for unemployment has a negative connotation. The implications of rankings for certain other variables are less clear. A low rank for building permits issued may be positive, negative or neutral, depending on viewpoint. The reader should understand that the rankings can be interpreted in different ways.
- **Data Volatility.** Municipalities with small populations tend to experience greater volatility in values and rankings from one year to the next.
- **Comparing Ranks to Previous Fact Books.** The change in rank for a particular municipality from its rank in the previous (2009) Fact Book should be interpreted with caution, as data volatility (mentioned above) can often be responsible for a municipality’s change in rank.

Specific Caveats

- **Assessed Acres of Farmland:** This value pertains only to municipalities with land in the Pinelands Area; therefore rankings are not provided. Of those 53 municipalities with any amount of land in the Pinelands Area, six do not have any assessed acreage of farmland.

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

County Level Fact Sheets

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

2010 Census:

% of population in Pinelands Area

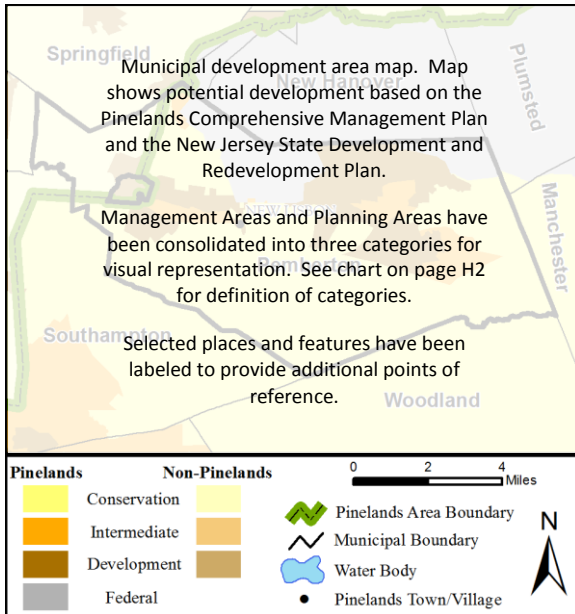
U.S. Census Bureau 2010, Census Block

% of housing units in the Pinelands Area

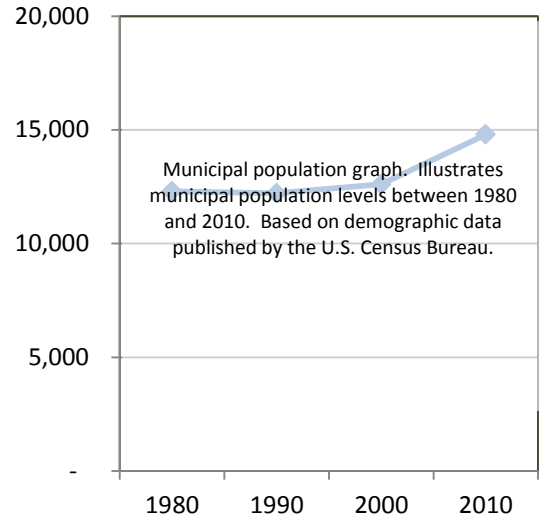
U.S. Census Bureau 2010, Census Block

% of land in the Pinelands Area

U.S. Census Bureau 2010 & N.J. Pinelands Commission



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|--|--------|-------------------------|------------------------------------|---|---------------------------------------|---------------------------|-------------------|--------------------|
| Conservation | | | | Intermediate | Development | | | Federal |
| Municipal Value | | | | | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | N.J. Department of Labor | | | | |
| Population Density 2011 (per mi ²) | | | | N.J. Department of Labor | | | | |
| Population Change 2000 – 2010 | | | | N.J. Department of Labor | | | | |
| Land Area (mi ²) | | | | N.J. Office of Information Technology & N.J. Pinelands Commission | | | | |
| % Land Permanently Protected in Pinelands Area | | | | N.J. Dept. of Environmental Protection, Green Acres | | | | |
| Assessed Acres of Farmland 2010 | | | | N.J. Agricultural Statistics Service | | | | |
| Building Permits 2011 | | | | N.J. Department of Labor | | | | |
| Residential Housing Transactions 2011 | | | | N.J. Department of Treasury, Division of Taxation | | | | |
| Average Sale Price of Homes 2011 | | | | N.J. Department of Treasury, Division of Taxation | | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | N.J. Dept. of Comm. Affairs, Div. of Local Gov. Service | | | | |
| Effective Tax Rate 2011 | | | | N.J. Dept. of Comm. Affairs, Div. of Local Gov. Service | | | | |
| Average Residential Property Tax Bill 2011 | | | | N.J. Dept. of Comm. Affairs, Div. of Local Gov. Service | | | | |
| Per Capita Income 2010 | | | | U.S. Census Bureau | | | | |
| Unemployment Rate 2011 | | | | N.J. Department of Labor | | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| N.J. Department of Labor | | | | | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| N.J. Department of Community Affairs, Division of Local Government Service | | | | | | | | |

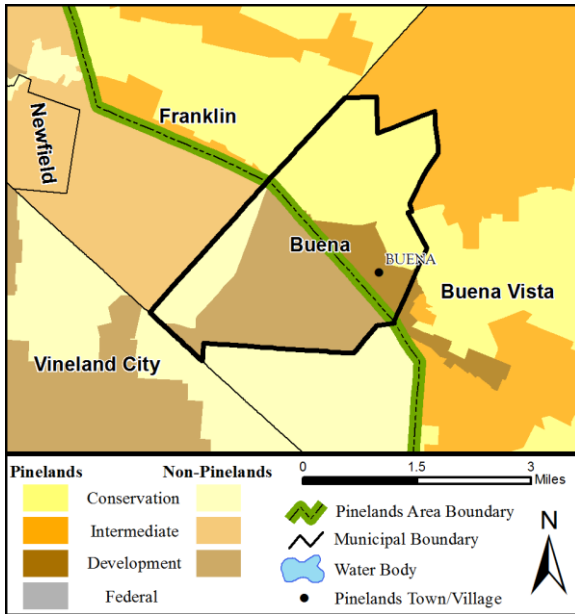
N/A – Due to limited data available

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

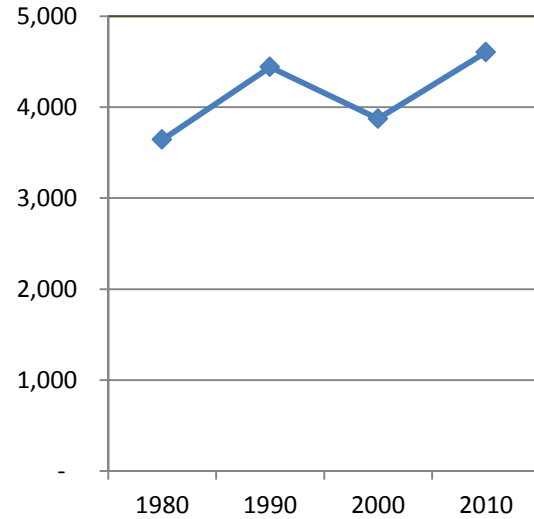
Buena Borough, Atlantic County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 22% | (1,030 residents / 4,603 total) |
| % of housing units in the Pinelands Area | 20% | (370 units / 1,855 total) |
| % of land in the Pinelands Area | 47% | (2,277 acres / 4,839 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|-----------------|---------------------------------------|---------------------------|--------------------|------------|
| | | 78% | | | | 22% | | | |
| | | | | Municipal Value | | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 4,600 | | 12,006 | 117 | | |
| Population Density 2011 (per mi ²) | | | | 605.3 | | 1,806.5 | 125 | | |
| Population Change 2000 - 2010 | | | | 18.8% | | 4.5% | 30 | | |
| Land Area (mi ²) | | | | 7.6 | | 19.3 | 102 | | |
| % Land Permanently Protected in Pinelands Area | | | | 21.1% | | *33.7% | *32 | | |
| Assessed Acres of Farmland 2010 | | | | *1,060 | | N/A | N/A | | |
| Building Permits 2011 | | | | 2 | | 19.7 | 129 | | |
| Residential Housing Transactions 2011 | | | | 19 | | 59 | 115 | | |
| Average Sale Price of Homes 2011 | | | | \$178,911 | | \$291,382 | 145 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$297.4 | | \$1,642 | 144 | | |
| Effective Tax Rate 2011 | | | | 2.47 | | 2.25 | 81 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,390 | | \$5,503 | 150 | | |
| Per Capita Income 2010 | | | | \$23,044 | | \$32,312 | 177 | | |
| Unemployment Rate 2011 | | | | 14.5% | | 10.6% | 32 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 712 | | | 92 | | | \$41,978.2 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.9% | 82.5% | 0.6% | 9.8% | 1.2% | 2.9% |

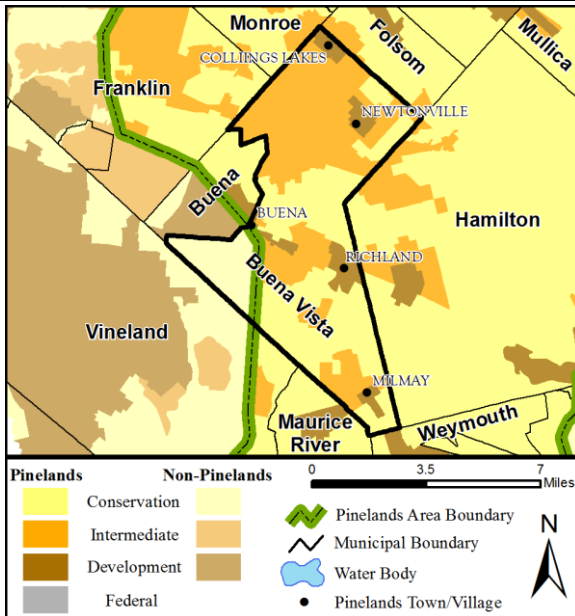
N/A – Due to limited data available

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

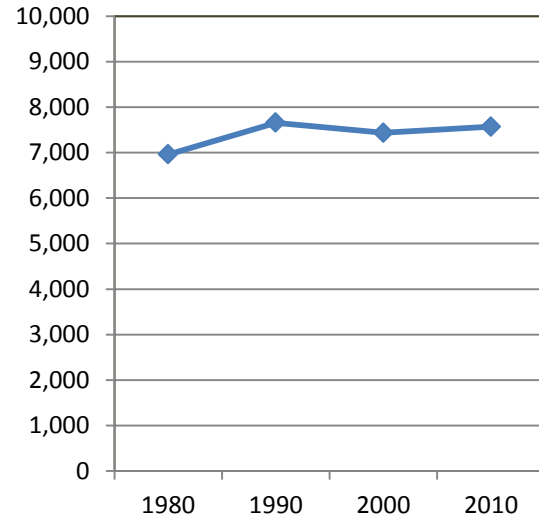
Buena Vista Township, Atlantic County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 83% | (6,316 Residents / 7,570 total) |
| % of housing units in the Pinelands Area | 80% | (2,394 units / 3,008 total) |
| % of land in the Pinelands Area | 90% | (23,954 acres / 26,598 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | 31% | 12% | | 48% | | 1% | 7% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 7,564 | 12,006 | 90 | | |
| Population Density 2011 (per mi ²) | | | | 181.8 | 1,806.5 | 170 | | |
| Population Change 2000 - 2010 | | | | 1.8% | 4.5% | 94 | | |
| Land Area (mi ²) | | | | 41.6 | 19.3 | 33 | | |
| % Land Permanently Protected in Pinelands Area | | | | 15.0% | *33.7% | *35 | | |
| Assessed Acres of Farmland 2010 | | | | *3,521 | N/A | N/A | | |
| Building Permits 2011 | | | | 7 | 19.7 | 96 | | |
| Residential Housing Transactions 2011 | | | | 12 | 59 | 141 | | |
| Average Sale Price of Homes 2011 | | | | \$224,408 | \$291,382 | 98 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$613.9 | \$1,642 | 110 | | |
| Effective Tax Rate 2011 | | | | 2.11 | 2.25 | 122 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,269 | \$5,503 | 155 | | |
| Per Capita Income 2010 | | | | \$26,640 | \$32,312 | 144 | | |
| Unemployment Rate 2011 | | | | 10.7% | 10.6% | 90 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 1,062 | | | 100 | | \$43,062.7 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 5.4% | 83.6% | 0.4% | 8.6% | 2.0% | 0.1% |

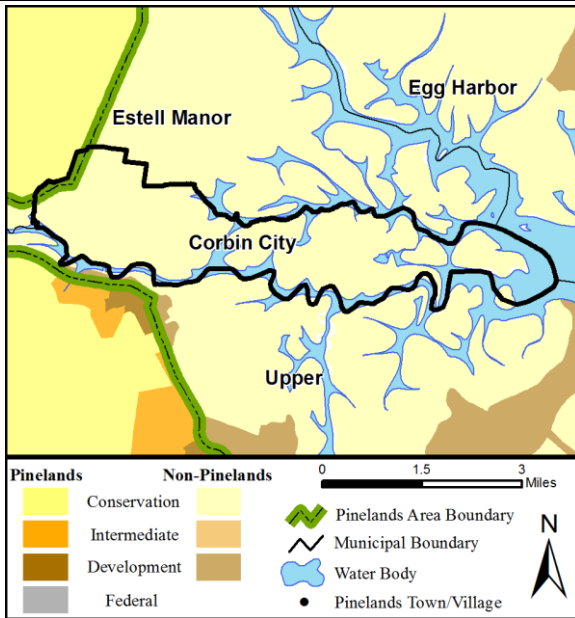
N/A – Due to limited data available

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

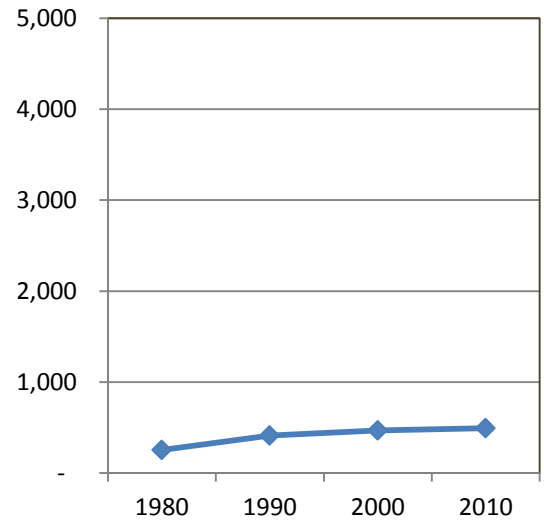
Corbin City, Atlantic County

2010 Census:

| | | |
|--|----|---------------------------|
| % of population in Pinelands Area | 0% | (0 Residents / 487 total) |
| % of housing units in the Pinelands Area | 0% | (0 units / 210 total) |
| % of land in the Pinelands Area | 1% | (68 acres / 5,599 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|------------------------------|---------------------------|--------------------|
| | 100% | | | | | | | |
| | | | | Municipal Value | | South N.J. Municipal Average | South N.J. Municipal Rank | |
| Population Estimate 2011 | | | | 491 | 12,006 | 197 | | |
| Population Density 2011 (per mi ²) | | | | 54.6 | 1,806.5 | 192 | | |
| Population Change 2000 - 2010 | | | | 5.1% | 4.5% | 75 | | |
| Land Area (mi ²) | | | | 9 | 19.3 | 96 | | |
| % Land Permanently Protected in Pinelands Area | | | | 9.4% | *33.7% | *37 | | |
| Assessed Acres of Farmland 2010 | | | | *2 | N/A | N/A | | |
| Building Permits 2011 | | | | 2 | 19.7 | 129 | | |
| Residential Housing Transactions 2011 | | | | 1 | 59 | 191 | | |
| Average Sale Price of Homes 2011 | | | | \$274,000 | \$291,382 | 61 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$63.7 | \$1,642 | 195 | | |
| Effective Tax Rate 2011 | | | | 1.31 | 2.25 | 178 | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,238 | \$5,503 | 193 | | |
| Per Capita Income 2010 | | | | \$28,347 | \$32,312 | 120 | | |
| Unemployment Rate 2011 | | | | 9.4% | 10.6% | 115 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 49 | | | 11 | | \$18,650.4 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 4.9% | 84.8% | 0.3% | 9.9% | 0.0% | 0.0% |

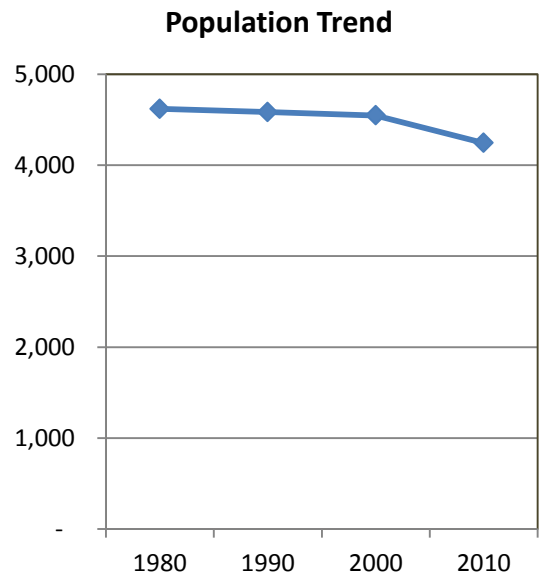
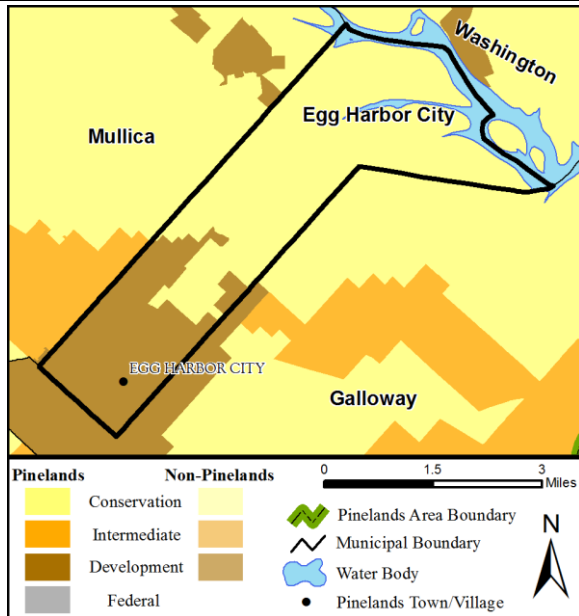
N/A – Due to limited data available

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

Egg Harbor City, Atlantic County

2010 Census:

| | | |
|--|------|---------------------------------|
| % of population in Pinelands Area | 100% | (4,243 Residents / 4,243 total) |
| % of housing units in the Pinelands Area | 100% | (1,736 units / 1,736 total) |
| % of land in the Pinelands Area | 100% | 7,372 acres / 7,372 total) |



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 35% | 36% | | | | | 29% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 4,240 | 12,006 | 122 | | |
| Population Density 2011 (per mi ²) | | | | 371.9 | 1,806.5 | 145 | | |
| Population Change 2000 - 2010 | | | | -6.6% | 4.5% | 170 | | |
| Land Area (mi ²) | | | | 11.4 | 19.3 | 89 | | |
| % Land Permanently Protected in Pinelands Area | | | | 2.1% | *33.7% | *41 | | |
| Assessed Acres of Farmland 2010 | | | | *0 | N/A | N/A | | |
| Building Permits 2011 | | | | 14 | 19.7 | 60 | | |
| Residential Housing Transactions 2011 | | | | 17 | 59 | 122 | | |
| Average Sale Price of Homes 2011 | | | | \$144,753 | \$291,382 | 180 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$286.3 | \$1,642 | 149 | | |
| Effective Tax Rate 2011 | | | | 3.11 | 2.25 | 28 | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,619 | \$5,503 | 80 | | |
| Per Capita Income 2010 | | | | \$22,294 | \$32,312 | 182 | | |
| Unemployment Rate 2011 | | | | 19.0% | 10.6% | 9 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 2,566 | | | 241 | | \$34,380.0 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 2.3% | 78.8% | 0.0% | 14.3% | 2.3% | 2.3% |

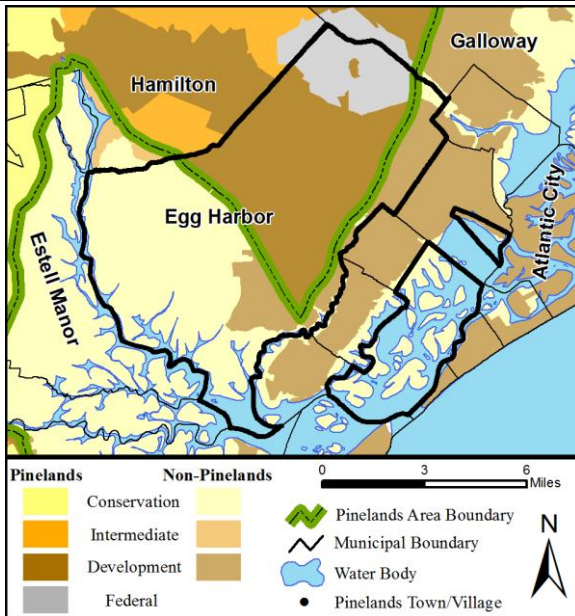
N/A – Due to limited data available

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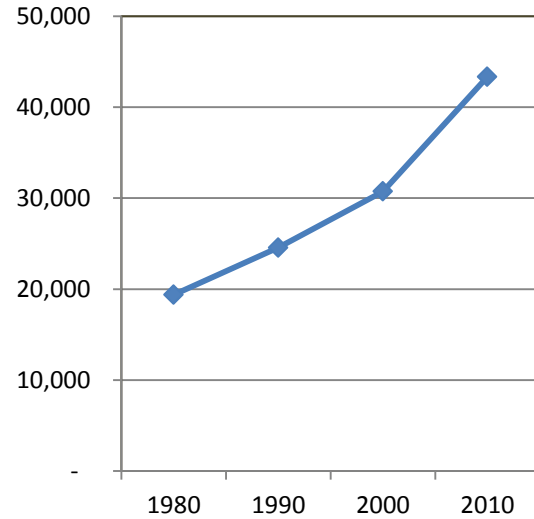
Egg Harbor Township

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 64% | (27,556 Residents / 43,310 total) |
| % of housing units in the Pinelands Area | 62% | (9,757 units / 15,837 total) |
| % of land in the Pinelands Area | 44% | (17,867 acres / 40,452 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | | | | | 80% | | | 20% |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 43,288 | 12,006 | 11 | | |
| Population Density 2011 (per mi ²) | | | | 573.4 | 1,806.5 | 127 | | |
| Population Change 2000 - 2010 | | | | 41.0% | 4.5% | 8 | | |
| Land Area (mi ²) | | | | 75.5 | 19.3 | 11 | | |
| % Land Permanently Protected in Pinelands Area | | | | 1.0% | *33.7% | *42 | | |
| Assessed Acres of Farmland 2010 | | | | *954 | N/A | N/A | | |
| Building Permits 2011 | | | | 63 | 19.7 | 20 | | |
| Residential Housing Transactions 2011 | | | | 226 | 59 | 13 | | |
| Average Sale Price of Homes 2011 | | | | \$242,759 | \$291,382 | 80 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$4,452.9 | \$1,642 | 17 | | |
| Effective Tax Rate 2011 | | | | 2.37 | 2.25 | 94 | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,706 | \$5,503 | 77 | | |
| Per Capita Income 2010 | | | | \$29,114 | \$32,312 | 113 | | |
| Unemployment Rate 2011 | | | | 11.6% | 10.6% | 68 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 10,921 | | | 889 | | \$42,835.0 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 4.4% | 77.5% | 0.0% | 16.6% | 1.1% | 0.3% |

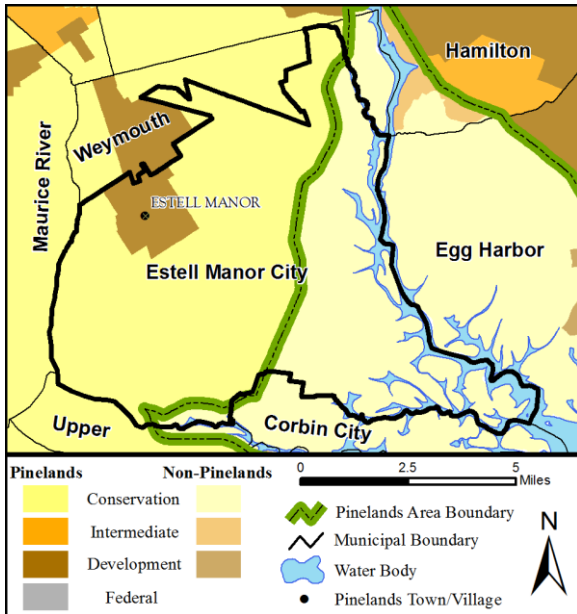
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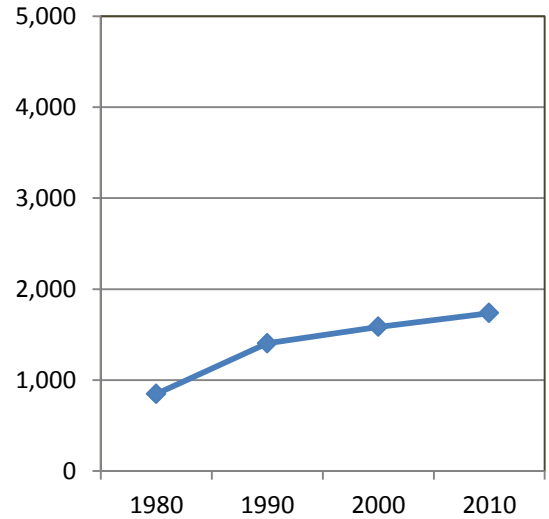
Estell Manor City, Atlantic County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 94% | (1,622 Residents / 1,731 total) |
| % of housing units in the Pinelands Area | 93% | (625 units/ 669 total) |
| % of land in the Pinelands Area | 63% | (22,423 acres / 35,609 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|------------------------------------|---------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| | 88% | 4% | | | | | 8% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 1,734 | 12,006 | 167 | | | |
| Population Density 2011 (per mi ²) | | | | 31.4 | 1,806.5 | 196 | | | |
| Population Change 2000 - 2010 | | | | 9.5% | 4.5% | 52 | | | |
| Land Area (mi ²) | | | | 55.2 | 19.3 | 20 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 41.9% | *33.7% | *22 | | | |
| Assessed Acres of Farmland 2010 | | | | *5,902 | N/A | N/A | | | |
| Building Permits 2011 | | | | 2 | 19.7 | 129 | | | |
| Residential Housing Transactions 2011 | | | | 5 | 59 | 174 | | | |
| Average Sale Price of Homes 2011 | | | | \$225,800 | \$291,382 | 96 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$185.2 | \$1,642 | 173 | | | |
| Effective Tax Rate 2011 | | | | 1.83 | 2.25 | 146 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,859 | \$5,503 | 173 | | | |
| Per Capita Income 2010 | | | | \$27,838 | \$32,312 | 129 | | | |
| Unemployment Rate 2011 | | | | 14.2% | 10.6% | 34 | | | |
| Private Sector Employment 2010 | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | | |
| 138 | | 36 | | | \$36,593.1 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 7.2% | 86.7% | 1.5% | 2.8% | 1.3% | 0.5% |

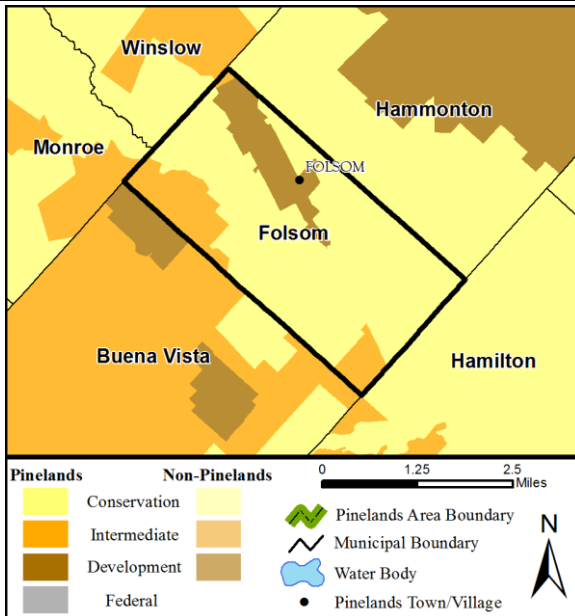
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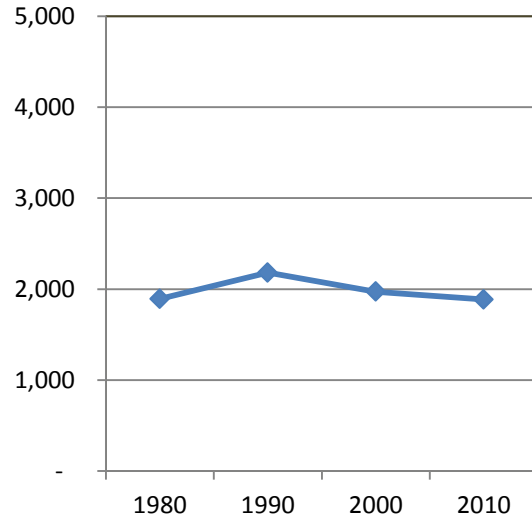
Folsom Borough, Atlantic County

2010 Census:

| | | |
|--|------|---------------------------------|
| % of population in Pinelands Area | 100% | (1,885 Residents / 1,885 total) |
| % of housing units in the Pinelands Area | 100% | (717 units / 717 total) |
| % of land in the Pinelands Area | 100% | (5,426 acres / 5,426 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| | 68% | 6% | | 14% | | | 12% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 1,884 | 12,006 | 161 | | | |
| Population Density 2011 (per mi ²) | | | | 221.6 | 1,806.5 | 164 | | | |
| Population Change 2000 - 2010 | | | | -4.4% | 4.5% | 157 | | | |
| Land Area (mi ²) | | | | 8.5 | 19.3 | 98 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 16.2% | *33.7% | *34 | | | |
| Assessed Acres of Farmland 2010 | | | | *678 | N/A | N/A | | | |
| Building Permits 2011 | | | | 1 | 19.7 | 143 | | | |
| Residential Housing Transactions 2011 | | | | 11 | 59 | 146 | | | |
| Average Sale Price of Homes 2011 | | | | \$191,140 | \$291,382 | 130 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$189.9 | \$1,642 | 171 | | | |
| Effective Tax Rate 2011 | | | | 1.59 | 2.25 | 160 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,392 | \$5,503 | 190 | | | |
| Per Capita Income 2010 | | | | \$29,446 | \$32,312 | 107 | | | |
| Unemployment Rate 2011 | | | | 6.1% | 10.6% | 184 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 772 | | | 45 | | | \$69,815.5 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 3.9% | 76.5% | 0.2% | 7.9% | 11.5% | 0.0% |

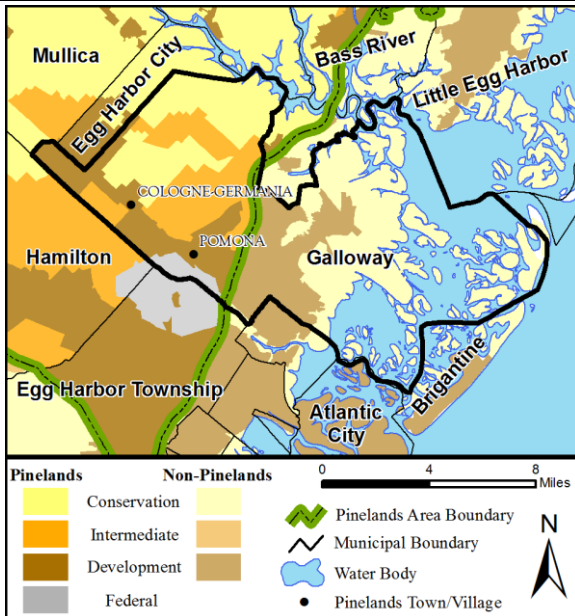
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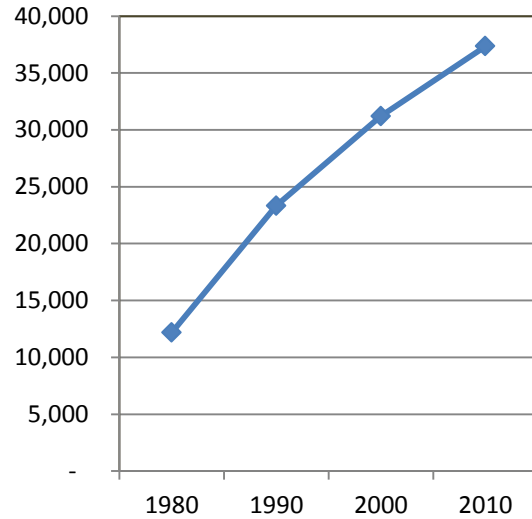
Galloway Township, Atlantic County

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 40% | (14,945 Residents / 37,349 total) |
| % of housing units in the Pinelands Area | 32% | (4,582 units / 14,132 total) |
| % of land in the Pinelands Area | 38% | (27,005 acres / 70,619 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 10% | 12% | 14% | | 34% | 14% | 9% | 3% | 4% |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 37,322 | 12,006 | 17 | | |
| Population Density 2011 (per mi ²) | | | | 335.3 | 1,806.5 | 148 | | |
| Population Change 2000 - 2010 | | | | 19.7% | 4.5% | 29 | | |
| Land Area (mi ²) | | | | 111.3 | 19.3 | 2 | | |
| % Land Permanently Protected in Pinelands Area | | | | 13.4% | *33.7% | *36 | | |
| Assessed Acres of Farmland 2010 | | | | *1,039 | N/A | N/A | | |
| Building Permits 2011 | | | | 21 | 19.7 | 49 | | |
| Residential Housing Transactions 2011 | | | | 227 | 59 | 11 | | |
| Average Sale Price of Homes 2011 | | | | \$210,036 | \$291,382 | 111 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$3,406.4 | \$1,642 | 28 | | |
| Effective Tax Rate 2011 | | | | 2.16 | 2.25 | 116 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,541 | \$5,503 | 137 | | |
| Per Capita Income 2010 | | | | \$24,302 | \$32,312 | 170 | | |
| Unemployment Rate 2011 | | | | 11.5% | 10.6% | 70 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 7,853 | | | 552 | | \$39,080.4 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 3.7% | 82.9% | 0.0% | 11.0% | 0.4% | 2.0% |

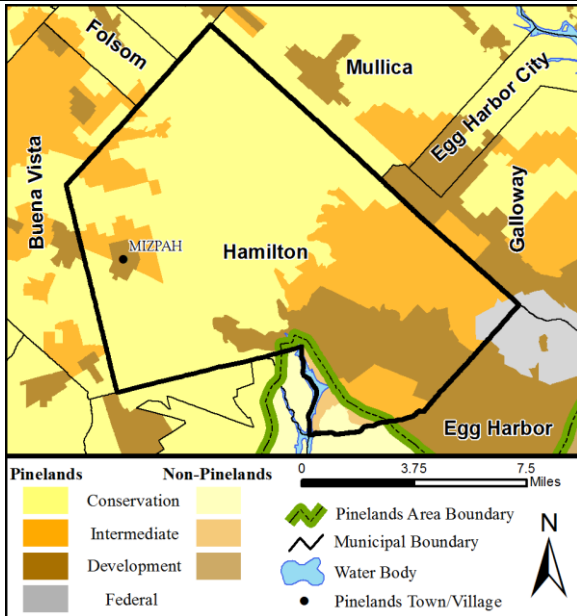
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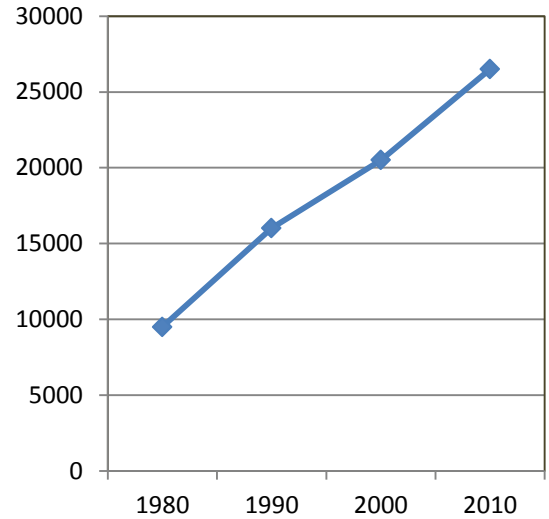
Hamilton Township, Atlantic County

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 94% | (24,954 Residents / 26,503 total) |
| % of housing units in the Pinelands Area | 94% | (9,625 units/ 10,196 total) |
| % of land in the Pinelands Area | 97% | (70,065 acres / 72,318 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | 55% | 4% | | 25% | 13% | | 1% | 1% |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 26,483 | 12,006 | 27 | | |
| Population Density 2011 (per mi ²) | | | | 234.6 | 1,806.5 | 160 | | |
| Population Change 2000 - 2010 | | | | 29.3% | 4.5% | 14 | | |
| Land Area (mi ²) | | | | 112.9 | 19.3 | 1 | | |
| % Land Permanently Protected in Pinelands Area | | | | 35.9% | *33.7% | *25 | | |
| Assessed Acres of Farmland 2010 | | | | *6,055 | N/A | N/A | | |
| Building Permits 2011 | | | | 51 | 19.7 | 26 | | |
| Residential Housing Transactions 2011 | | | | 48 | 59 | 67 | | |
| Average Sale Price of Homes 2011 | | | | \$193,823 | \$291,382 | 128 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$2,440.5 | \$1,642 | 41 | | |
| Effective Tax Rate 2011 | | | | 2.32 | 2.25 | 103 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,447 | \$5,503 | 141 | | |
| Per Capita Income 2010 | | | | \$25,292 | \$32,312 | 158 | | |
| Unemployment Rate 2011 | | | | 11.9% | 10.6% | 61 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 7,276 | | | 557 | | \$27,680.2 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 5.1% | 68.2% | 0.1% | 21.1% | 1.1% | 4.5% |

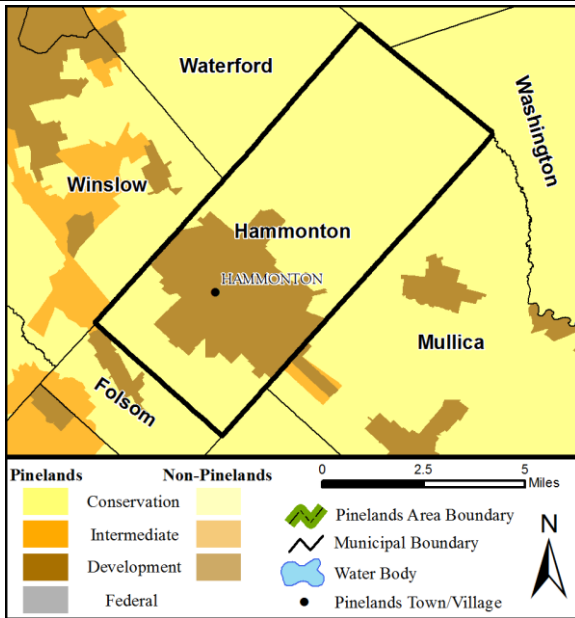
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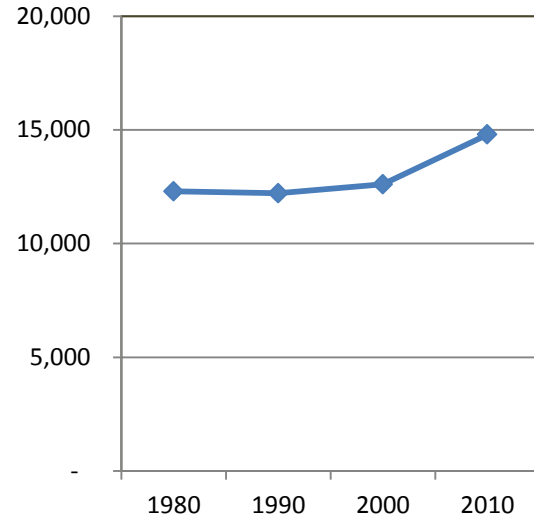
Hammonton Town, Atlantic City

2010 Census:

| | | |
|--|------|-----------------------------------|
| % of population in Pinelands Area | 100% | (14,791 Residents / 14,791 total) |
| % of housing units in the Pinelands Area | 100% | (5,715 units/ 5,715 total) |
| % of land in the Pinelands Area | 100% | (26,581 acres / 26,581 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 33% | 5% | 33% | 2% | | | 26% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 14,779 | 12,006 | 46 | | |
| Population Density 2011 (per mi ²) | | | | 357.8 | 1,806.5 | 147 | | |
| Population Change 2000 - 2010 | | | | 17.4% | 4.5% | 32 | | |
| Land Area (mi ²) | | | | 41.3 | 19.3 | 34 | | |
| % Land Permanently Protected in Pinelands Area | | | | 48.7% | *33.7% | *18 | | |
| Assessed Acres of Farmland 2010 | | | | *6,793 | N/A | N/A | | |
| Building Permits 2011 | | | | 10 | 19.7 | 77 | | |
| Residential Housing Transactions 2011 | | | | 60 | 59 | 55 | | |
| Average Sale Price of Homes 2011 | | | | \$220,676 | \$291,382 | 105 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$1,416.7 | \$1,642 | 63 | | |
| Effective Tax Rate 2011 | | | | 2.08 | 2.25 | 124 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,687 | \$5,503 | 127 | | |
| Per Capita Income 2010 | | | | \$26,130 | \$32,312 | 151 | | |
| Unemployment Rate 2011 | | | | 16.2% | 10.6% | 19 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 7,066 | | | 622 | | \$35,821.0 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 2.1% | 75.8% | 0.7% | 18.1% | 2.4% | 0.9% |

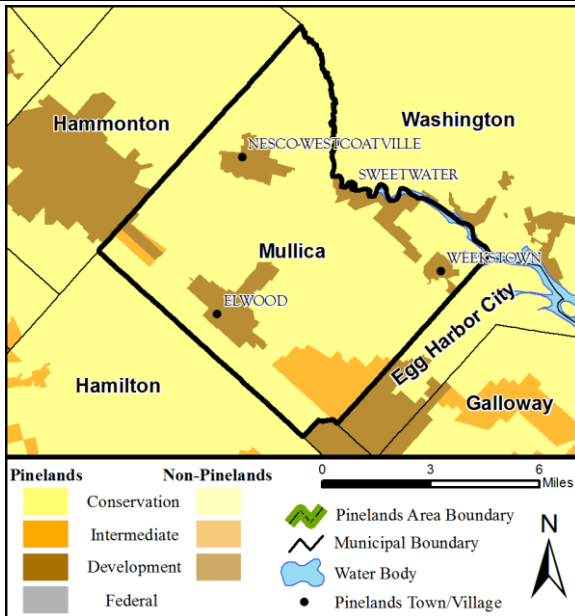
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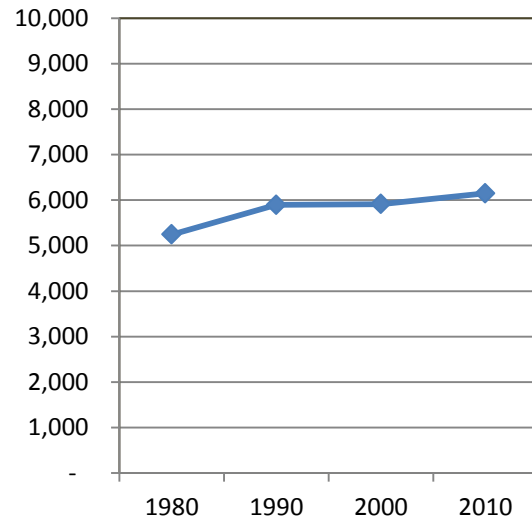
Mullica Township, Atlantic County

2010 Census:

| | | |
|--|------|---------------------------------|
| % of population in Pinelands Area | 100% | (6,041 Residents / 6,041 total) |
| % of housing units in the Pinelands Area | 100% | (2,295 units / 2,295 total) |
| % of land in the Pinelands Area | 100% | (36,406 acres / 36,406 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| 13% | 59% | 9% | | 7% | | 1% | 11% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 6,144 | 12,006 | 102 | | | |
| Population Density 2011 (per mi ²) | | | | 108.2 | 1,806.5 | 182 | | | |
| Population Change 2000 - 2010 | | | | 4.0% | 4.5% | 81 | | | |
| Land Area (mi ²) | | | | 56.8 | 19.3 | 18 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 30.3% | *33.7% | *26 | | | |
| Assessed Acres of Farmland 2010 | | | | *6,422 | N/A | N/A | | | |
| Building Permits 2011 | | | | 12 | 19.7 | 69 | | | |
| Residential Housing Transactions 2011 | | | | 31 | 59 | 93 | | | |
| Average Sale Price of Homes 2011 | | | | \$235,694 | \$291,382 | 85 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$572.3 | \$1,642 | 113 | | | |
| Effective Tax Rate 2011 | | | | 2.03 | 2.25 | 130 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,600 | \$5,503 | 132 | | | |
| Per Capita Income 2010 | | | | \$26,217 | \$32,312 | 148 | | | |
| Unemployment Rate 2011 | | | | 13.0% | 10.6% | 50 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | | |
| 173 | | | 31 | | \$28,550.3 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 4.7% | 88.8% | 0.8% | 5.0% | 0.6% | 0.2% |

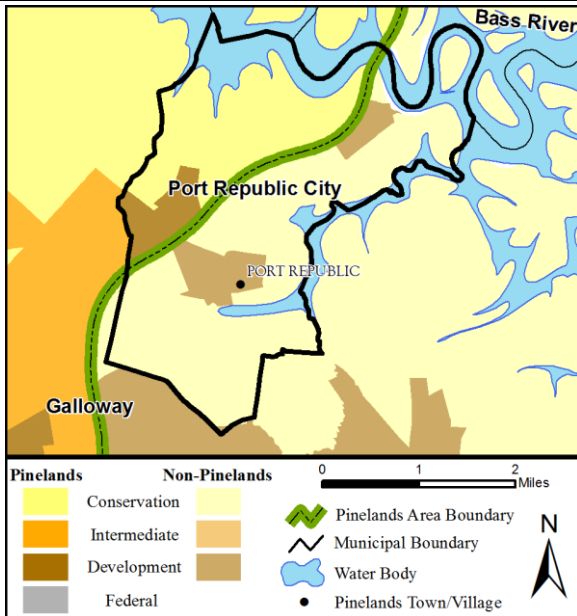
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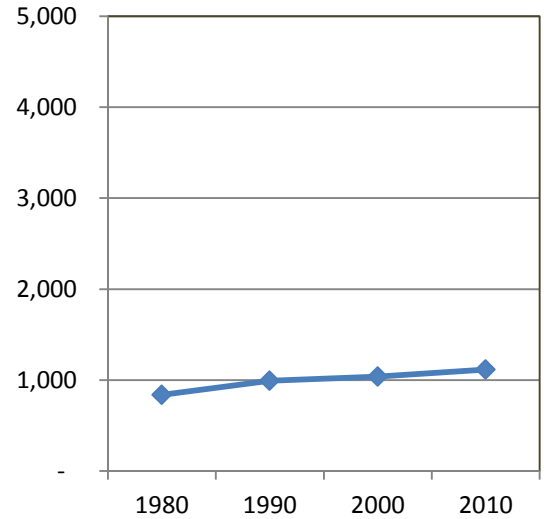
Port Republic City, Atlantic County

2010 Census:

| | | |
|--|-----|------------------------------|
| % of population in Pinelands Area | 8% | (88 Residents / 1,115 total) |
| % of housing units in the Pinelands Area | 8% | (36 units / 444 total) |
| % of land in the Pinelands Area | 36% | (1,952 acres / 5,445 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|-----------------|---------------------------------------|-------------------|---------------------------|------------|
| 85% | | | | | | | 15% | | |
| | | | | Municipal Value | | South N.J. Municipal Average | | South N.J. Municipal Rank | |
| Population Estimate 2011 | | | | 1,113 | 12,006 | | 182 | | |
| Population Density 2011 (per mi ²) | | | | 129.4 | 1,806.5 | | 178 | | |
| Population Change 2000 - 2010 | | | | 7.5% | 4.5% | | 61 | | |
| Land Area (mi ²) | | | | 8.6 | 19.3 | | 97 | | |
| % Land Permanently Protected in Pinelands Area | | | | 36.5% | *33.7% | | *24 | | |
| Assessed Acres of Farmland 2010 | | | | *70 | N/A | | N/A | | |
| Building Permits 2011 | | | | 1 | 19.7 | | 143 | | |
| Residential Housing Transactions 2011 | | | | 7 | 59 | | 158 | | |
| Average Sale Price of Homes 2011 | | | | \$312,143 | \$291,382 | | 42 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$140.5 | \$1,642 | | 183 | | |
| Effective Tax Rate 2011 | | | | 1.81 | 2.25 | | 148 | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,124 | \$5,503 | | 102 | | |
| Per Capita Income 2010 | | | | \$36,408 | \$32,312 | | 45 | | |
| Unemployment Rate 2011 | | | | 7.7% | 10.6% | | 153 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 43 | | | 16 | | | \$19,656.3 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.8% | 93.9% | 0.1% | 3.3% | 0.0% | 0.0% |

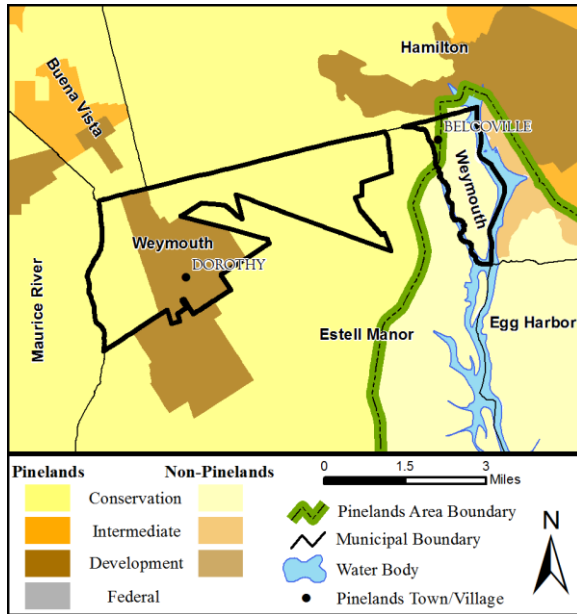
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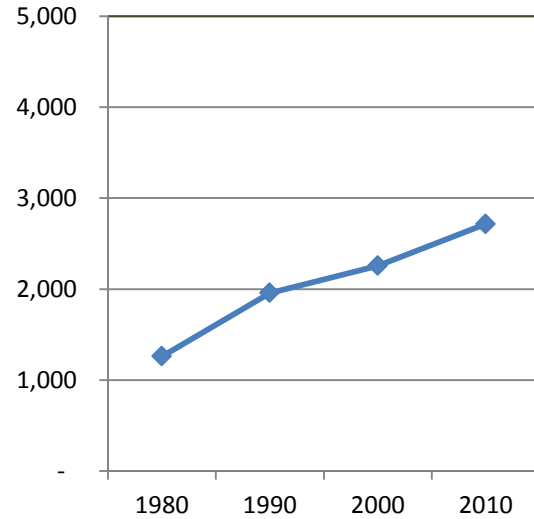
Weymouth Township, Atlantic County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 77% | (2,093 Residents / 2,722 total) |
| % of housing units in the Pinelands Area | 78% | (953 units / 1,225 total) |
| % of land in the Pinelands Area | 83% | (6,383 acres / 7,716 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | 70% | | | | | | 30% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 2,712 | 12,006 | 148 | | |
| Population Density 2011 (per mi ²) | | | | 222.3 | 1,806.5 | 163 | | |
| Population Change 2000 - 2010 | | | | 20.3% | 4.5% | 26 | | |
| Land Area (mi ²) | | | | 12.2 | 19.3 | 84 | | |
| % Land Permanently Protected in Pinelands Area | | | | 5.4% | *33.7% | *40 | | |
| Assessed Acres of Farmland 2010 | | | | *5 | N/A | N/A | | |
| Building Permits 2011 | | | | 1 | 19.7 | 143 | | |
| Residential Housing Transactions 2011 | | | | 4 | 59 | 181 | | |
| Average Sale Price of Homes 2011 | | | | \$231,375 | \$291,382 | 90 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$169.7 | \$1,642 | 178 | | |
| Effective Tax Rate 2011 | | | | 1.91 | 2.25 | 139 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,054 | \$5,503 | 163 | | |
| Per Capita Income 2010 | | | | \$28,857 | \$32,312 | 115 | | |
| Unemployment Rate 2011 | | | | 8.0% | 10.6% | 146 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 140 | | | 27 | | \$40,635.8 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 5.5% | 83.0% | 0.0% | 9.9% | 0.2% | 1.5% |

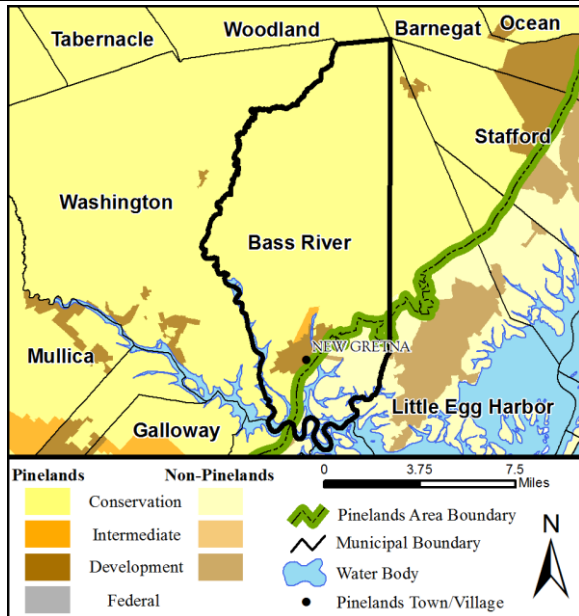
N/A – Due to limited data available

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

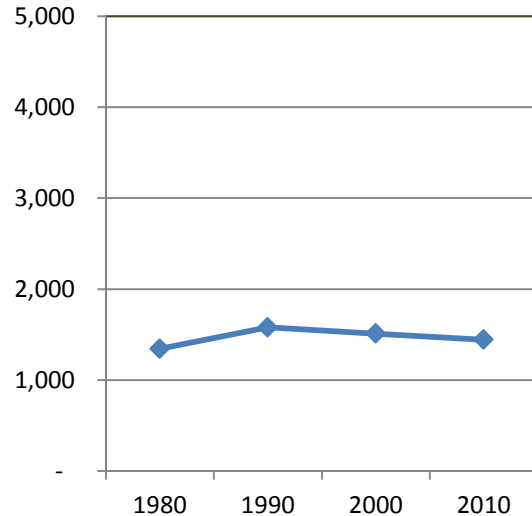
Bass River Township, Burlington County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 72% | (1,036 Residents / 1,443 total) |
| % of housing units in the Pinelands Area | 74% | (437 units / 587 total) |
| % of land in the Pinelands Area | 87% | (43,791 acres / 50,380 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| 87% | < 1% | | 8% | 1% | | | 4% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 1,447 | 12,006 | 174 | | | |
| Population Density 2011 (per mi ²) | | | | 18.5 | 1,806.5 | 199 | | | |
| Population Change 2000 - 2010 | | | | -4.4% | 4.5% | 158 | | | |
| Land Area (mi ²) | | | | 78.3 | 19.3 | 10 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 50.6% | *33.7% | *15 | | | |
| Assessed Acres of Farmland 2010 | | | | *5,949 | N/A | N/A | | | |
| Building Permits 2011 | | | | 0 | 19.7 | 170 | | | |
| Residential Housing Transactions 2011 | | | | 2 | 59 | 186 | | | |
| Average Sale Price of Homes 2011 | | | | \$232,000 | \$291,382 | 89 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$189.6 | \$1,642 | 172 | | | |
| Effective Tax Rate 2011 | | | | 1.56 | 2.25 | 162 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,180 | \$5,503 | 159 | | | |
| Per Capita Income 2010 | | | | \$24,440 | \$32,312 | 169 | | | |
| Unemployment Rate 2011 | | | | 9.0% | 10.6% | 125 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| - | | | - | | | - | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 6.0% | 78.5% | 0.3% | 15.2% | 0.0% | 0.0% |

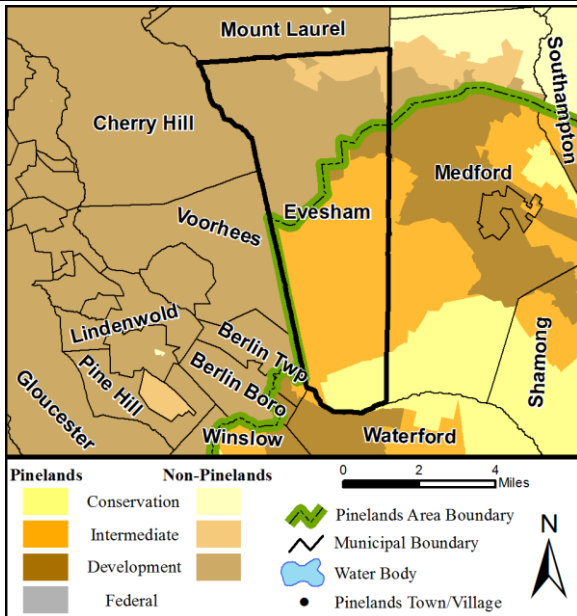
N/A – Due to limited data available

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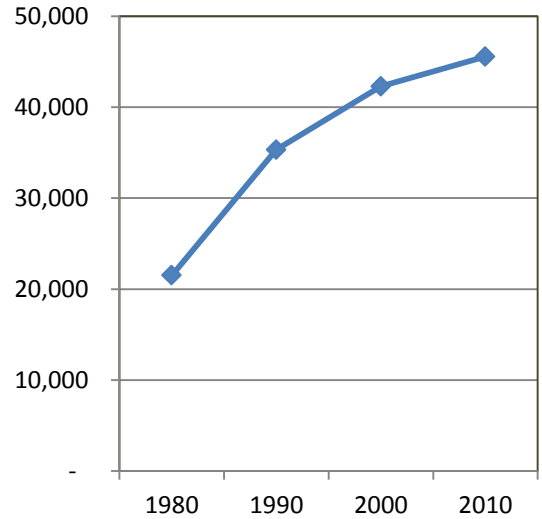
Evesham Township, Burlington County

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 26% | (11,860 Residents / 45,538 total) |
| % of housing units in the Pinelands Area | 26% | (4,809 units / 18,303 total) |
| % of land in the Pinelands Area | 55% | (10,344 acres / 18,849 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|------------------------------------|---------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| | 12% | | | 82% | 6% | | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 45,624 | 12,006 | 10 | | | |
| Population Density 2011 (per mi ²) | | | | 1,541.4 | 1,806.5 | 87 | | | |
| Population Change 2000 - 2010 | | | | 7.7% | 4.5% | 60 | | | |
| Land Area (mi ²) | | | | 29.6 | 19.3 | 50 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 19.9% | *33.7% | *33 | | | |
| Assessed Acres of Farmland 2010 | | | | *1,430 | N/A | N/A | | | |
| Building Permits 2011 | | | | 37 | 19.7 | 34 | | | |
| Residential Housing Transactions 2011 | | | | 179 | 59 | 18 | | | |
| Average Sale Price of Homes 2011 | | | | \$279,795 | \$291,382 | 58 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$5,490.3 | \$1,642 | 12 | | | |
| Effective Tax Rate 2011 | | | | 2.39 | 2.25 | 91 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$6,800 | \$5,503 | 34 | | | |
| Per Capita Income 2010 | | | | \$39,910 | \$32,312 | 27 | | | |
| Unemployment Rate 2011 | | | | 7.3% | 10.6% | 162 | | | |
| Private Sector Employment 2010 | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | | |
| 22,971 | | 1,493 | | | \$52,791.0 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 0.6% | 79.0% | 0.0% | 15.1% | 0.6% | 4.7% |

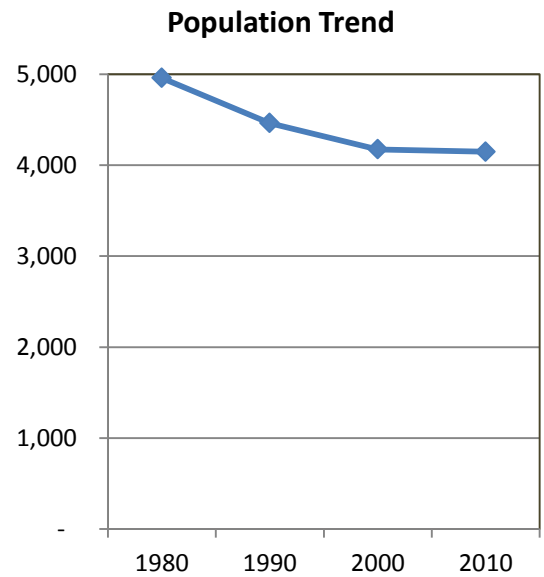
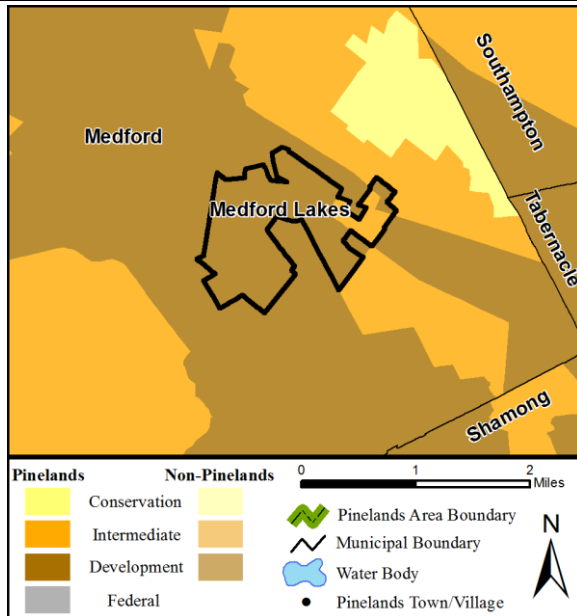
N/A – Due to limited data available

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Medford Lakes Borough, Burlington County

2010 Census:

| | | |
|--|------|---------------------------------|
| % of population in Pinelands Area | 100% | (4,124 Residents / 4,124 total) |
| % of housing units in the Pinelands Area | 100% | (1,535 units / 1,535 total) |
| % of land in the Pinelands Area | 100% | (812 acres / 812 total) |



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| | | | | 10% | 90% | | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 4,153 | 12,006 | 124 | | | |
| Population Density 2011 (per mi ²) | | | | 3,194.6 | 1,806.5 | 41 | | | |
| Population Change 2000 - 2010 | | | | -0.6% | 4.5% | 122 | | | |
| Land Area (mi ²) | | | | 1.3 | 19.3 | 162 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | | |
| Assessed Acres of Farmland 2010 | | | | *0 | N/A | N/A | | | |
| Building Permits 2011 | | | | 8 | 19.7 | 89 | | | |
| Residential Housing Transactions 2011 | | | | 26 | 59 | 101 | | | |
| Average Sale Price of Homes 2011 | | | | \$286,075 | \$291,382 | 55 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$478.9 | \$1,642 | 127 | | | |
| Effective Tax Rate 2011 | | | | 2.63 | 2.25 | 65 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$8,004 | \$5,503 | 14 | | | |
| Per Capita Income 2010 | | | | \$48,789 | \$32,312 | 12 | | | |
| Unemployment Rate 2011 | | | | 4.2% | 10.6% | 193 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | | |
| 367 | | | 69 | | \$59,751.8 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 0.3% | 97.9% | 0.0% | 1.9% | 0.0% | 0.0% |

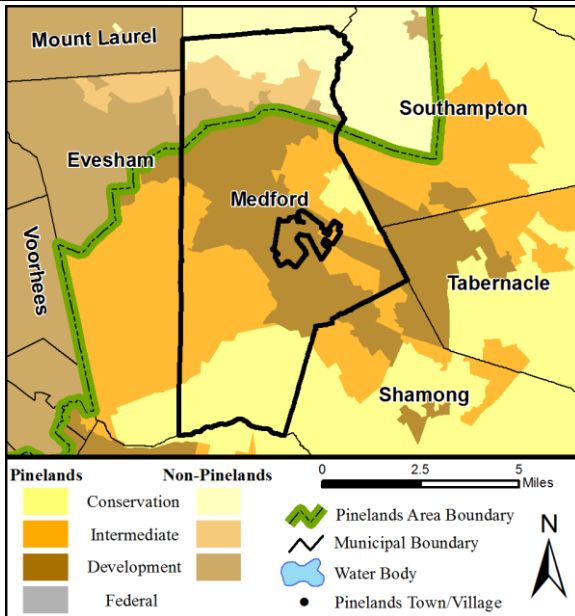
N/A – Due to limited data available

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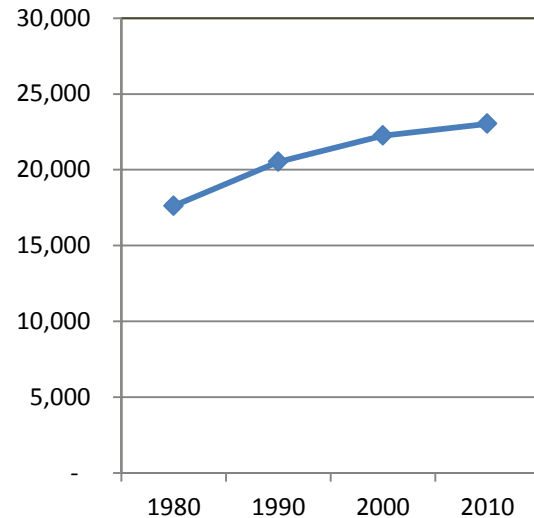
Medford Township, Burlington County

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 82% | (18,883 Residents / 23,055 total) |
| % of housing units in the Pinelands Area | 78% | (6,771 units / 8,660 total) |
| % of land in the Pinelands Area | 78% | (19,793 acres / 25,488 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 11% | 4% | 4% | 5% | 33% | 43% | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 23,077 | 12,006 | 29 | | |
| Population Density 2011 (per mi ²) | | | | 579.8 | 1,806.5 | 126 | | |
| Population Change 2000 - 2010 | | | | 3.5% | 4.5% | 83 | | |
| Land Area (mi ²) | | | | 39.8 | 19.3 | 37 | | |
| % Land Permanently Protected in Pinelands Area | | | | 24.7% | *33.7% | *30 | | |
| Assessed Acres of Farmland 2010 | | | | *4,884 | N/A | N/A | | |
| Building Permits 2011 | | | | 51 | 19.7 | 26 | | |
| Residential Housing Transactions 2011 | | | | 159 | 59 | 21 | | |
| Average Sale Price of Homes 2011 | | | | \$361,859 | \$291,382 | 31 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$3,194.1 | \$1,642 | 29 | | |
| Effective Tax Rate 2011 | | | | 2.49 | 2.25 | 80 | | |
| Average Residential Property Tax Bill 2011 | | | | \$8,977 | \$5,503 | 9 | | |
| Per Capita Income 2010 | | | | \$45,926 | \$32,312 | 17 | | |
| Unemployment Rate 2011 | | | | 5.5% | 10.6% | 188 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 6,244 | | | 831 | | \$37,064.0 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 1.0% | 88.2% | 0.2% | 8.4% | 0.5% | 1.7% |

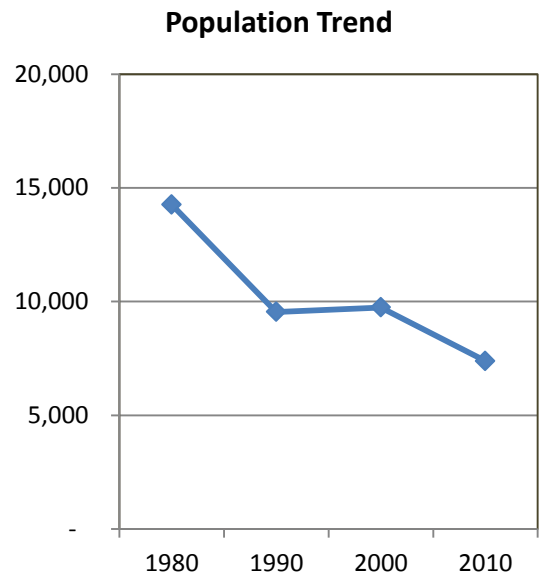
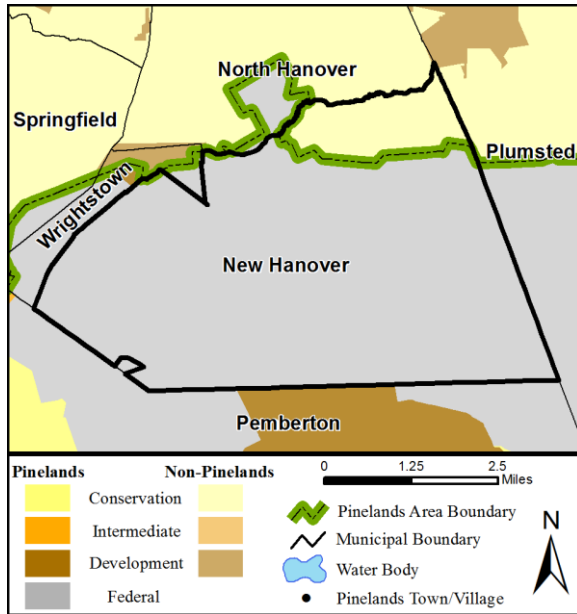
N/A – Due to limited data available

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New Hanover Township, Burlington County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 91% | (6,692 Residents / 7,385 total) |
| % of housing units in the Pinelands Area | 61% | (372 units / 613 total) |
| % of land in the Pinelands Area | 91% | (13,016 acres / 14,373 total) |



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | | | | | | | | 100% |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 7,396 | 12,006 | 93 | | |
| Population Density 2011 (per mi ²) | | | | 327.3 | 1,806.5 | 149 | | |
| Population Change 2000 - 2010 | | | | -24.2% | 4.5% | 193 | | |
| Land Area (mi ²) | | | | 22.6 | 19.3 | 59 | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | |
| Assessed Acres of Farmland 2010 | | | | *739 | N/A | N/A | | |
| Building Permits 2011 | | | | 2 | 19.7 | 129 | | |
| Residential Housing Transactions 2011 | | | | 1 | 59 | 191 | | |
| Average Sale Price of Homes 2011 | | | | \$235,000 | \$291,382 | 86 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$94.1 | \$1,642 | 191 | | |
| Effective Tax Rate 2011 | | | | 1.47 | 2.25 | 170 | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,950 | \$5,503 | 166 | | |
| Per Capita Income 2010 | | | | \$15,387 | \$32,312 | 198 | | |
| Unemployment Rate 2011 | | | | 7.9% | 10.6% | 147 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 1,617 | | | 127 | | \$36,100.9 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 2.5% | 76.3% | 1.0% | 20.1% | 0.1% | 0.0% |

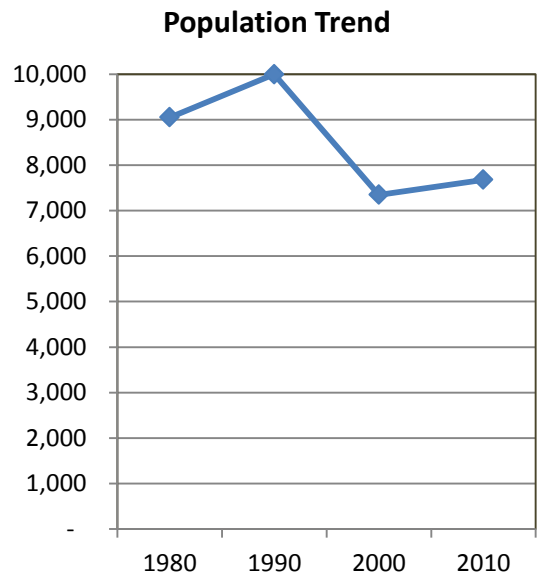
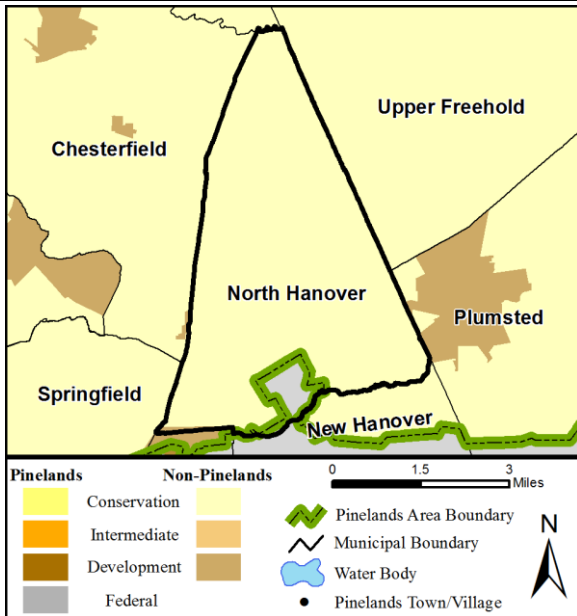
N/A – Due to limited data available

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North Hanover Township, Burlington County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 39% | (2,973 Residents / 7,667 total) |
| % of housing units in the Pinelands Area | 42% | (1,417 units / 3,367 total) |
| % of land in the Pinelands Area | 4% | (477 acres / 11,190 total) |



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|------------------------------------|---------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| | | | | | | | | 100% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 7,692 | 12,006 | 87 | | | |
| Population Density 2011 (per mi ²) | | | | 439.5 | 1,806.5 | 140 | | | |
| Population Change 2000 - 2010 | | | | 4.5% | 4.5% | 77 | | | |
| Land Area (mi ²) | | | | 17.5 | 19.3 | 74 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | | |
| Assessed Acres of Farmland 2010 | | | | *304 | N/A | N/A | | | |
| Building Permits 2011 | | | | 9 | 19.7 | 83 | | | |
| Residential Housing Transactions 2011 | | | | 6 | 59 | 163 | | | |
| Average Sale Price of Homes 2011 | | | | \$265,167 | \$291,382 | 66 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$439.2 | \$1,642 | 131 | | | |
| Effective Tax Rate 2011 | | | | 1.73 | 2.25 | 155 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,671 | \$5,503 | 79 | | | |
| Per Capita Income 2010 | | | | \$29,529 | \$32,312 | 106 | | | |
| Unemployment Rate 2011 | | | | 11.1% | 10.6% | 81 | | | |
| Private Sector Employment 2010 | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | | |
| 372 | | 72 | | | \$46,006.2 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 1.7% | 80.3% | 0.9% | 13.7% | 0.1% | 3.3% |

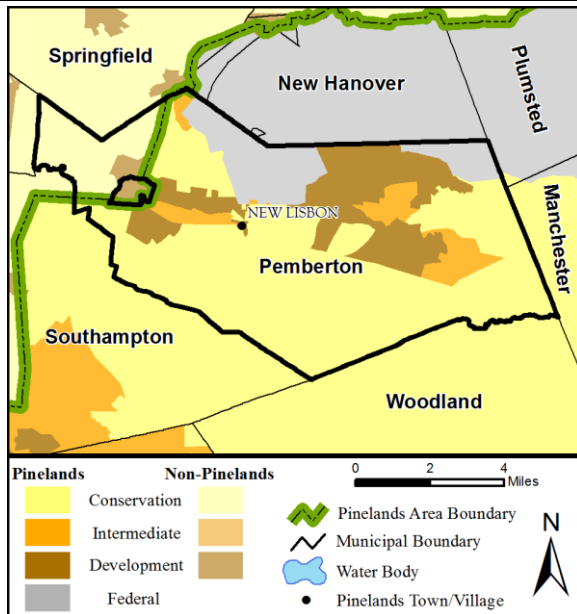
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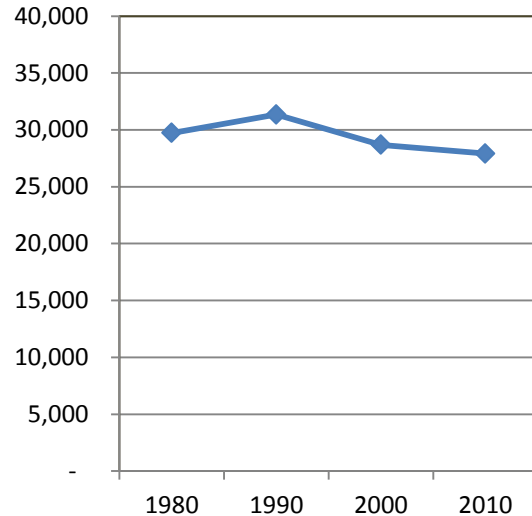
Pemberton Township, Burlington County

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 98% | (27,394 Residents / 27,911 total) |
| % of housing units in the Pinelands Area | 98% | (10,527 units / 10,749 total) |
| % of land in the Pinelands Area | 91% | (36,722 acres / 40,239 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 20% | 16% | 25% | 3% | 7% | 19% | | < 1% | 12% |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 27,966 | 12,006 | 24 | | |
| Population Density 2011 (per mi ²) | | | | 445.3 | 1,806.5 | 138 | | |
| Population Change 2000 - 2010 | | | | -2.7% | 4.5% | 140 | | |
| Land Area (mi ²) | | | | 62.8 | 19.3 | 16 | | |
| % Land Permanently Protected in Pinelands Area | | | | 38.9% | *33.7% | *23 | | |
| Assessed Acres of Farmland 2010 | | | | *8,191 | N/A | N/A | | |
| Building Permits 2011 | | | | 22 | 19.7 | 45 | | |
| Residential Housing Transactions 2011 | | | | 119 | 59 | 31 | | |
| Average Sale Price of Homes 2011 | | | | \$171,072 | \$291,382 | 157 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$1,571.9 | \$1,642 | 59 | | |
| Effective Tax Rate 2011 | | | | 1.94 | 2.25 | 135 | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,350 | \$5,503 | 192 | | |
| Per Capita Income 2010 | | | | \$26,240 | \$32,312 | 146 | | |
| Unemployment Rate 2011 | | | | 10.9% | 10.6% | 85 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 2,274 | | | 217 | | \$43,417.4 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 1.9% | 89.5% | 0.4% | 5.8% | 0.2% | 2.2% |

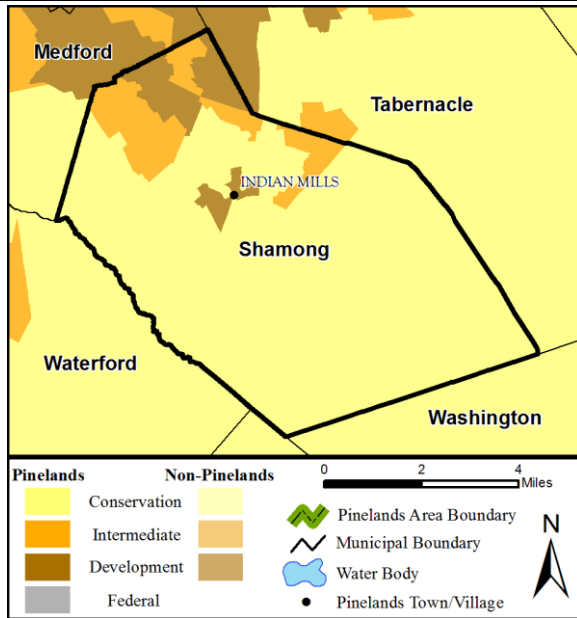
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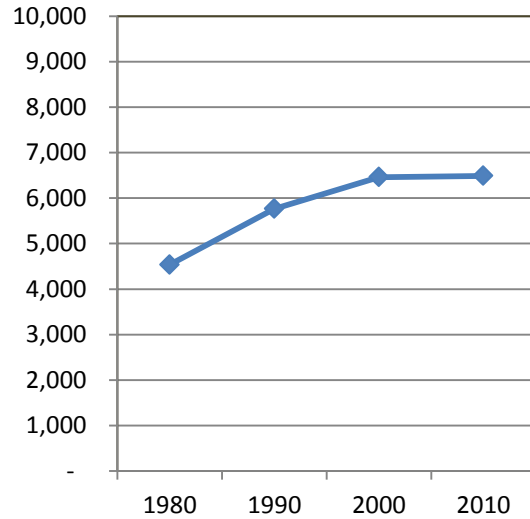
Shamong Township, Burlington County

2010 Census:

| | | |
|--|------|---------------------------------|
| % of population in Pinelands Area | 100% | (6,493 Residents / 6,493 total) |
| % of housing units in the Pinelands Area | 100% | (2,228 units / 2,228 total) |
| % of land in the Pinelands Area | 100% | (28,706 acres / 28,706 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|------------------------------------|---------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| 67% | 1% | 15% | 2% | 9% | 5% | | 1% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 6,473 | 12,006 | 98 | | | |
| Population Density 2011 (per mi ²) | | | | 143.8 | 1,806.5 | 175 | | | |
| Population Change 2000 - 2010 | | | | 0.4% | 4.5% | 109 | | | |
| Land Area (mi ²) | | | | 45.0 | 19.3 | 29 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 62.8% | *33.7% | *12 | | | |
| Assessed Acres of Farmland 2010 | | | | *4,745 | N/A | N/A | | | |
| Building Permits 2011 | | | | 9 | 19.7 | 83 | | | |
| Residential Housing Transactions 2011 | | | | 39 | 59 | 80 | | | |
| Average Sale Price of Homes 2011 | | | | \$322,315 | \$291,382 | 39 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$737.9 | \$1,642 | 100 | | | |
| Effective Tax Rate 2011 | | | | 2.21 | 2.25 | 110 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$7,612 | \$5,503 | 19 | | | |
| Per Capita Income 2010 | | | | \$38,817 | \$32,312 | 32 | | | |
| Unemployment Rate 2011 | | | | 6.8% | 10.6% | 178 | | | |
| Private Sector Employment 2010 | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | | |
| 787 | | 126 | | | \$37,550.8 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 1.1% | 96.1% | 0.6% | 1.9% | 0.3% | 0.0% |

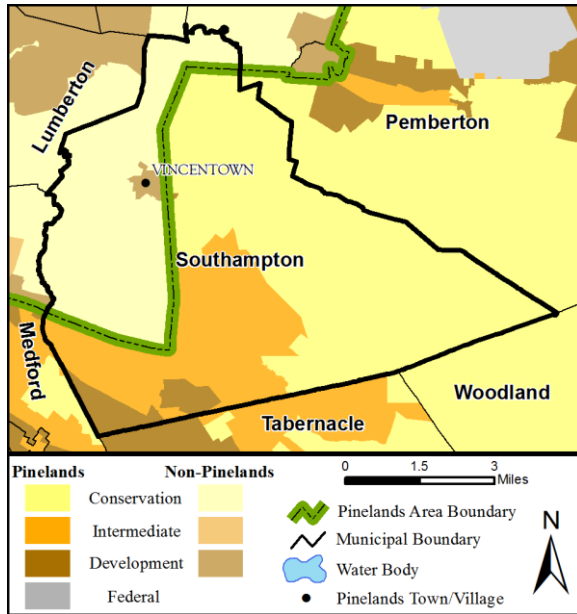
N/A – Due to limited data available

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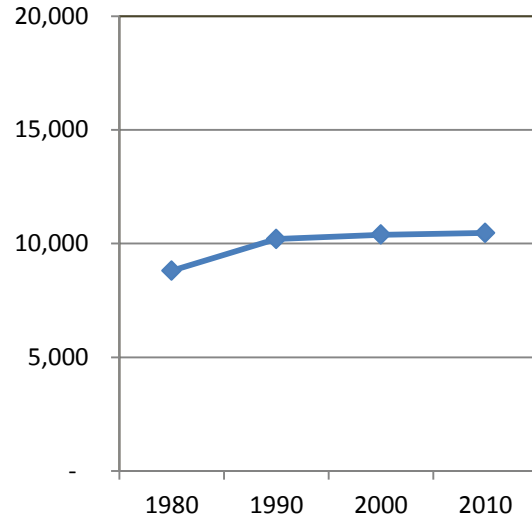
Southampton Township, Burlington County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 70% | (7,270 Residents/ 10,439 total) |
| % of housing units in the Pinelands Area | 74% | (3,707 units / 5,013 total) |
| % of land in the Pinelands Area | 73% | (20,760 acres / 28,459 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|-----------------|---------------------------------------|-------------------|---------------------------|------------|
| | 28% | 39% | | 28% | 5% | | < 1% | | |
| | | | | Municipal Value | | South N.J. Municipal Average | | South N.J. Municipal Rank | |
| Population Estimate 2011 | | | | 10,484 | | 12,006 | | 63 | |
| Population Density 2011 (per mi ²) | | | | 236.1 | | 1,806.5 | | 159 | |
| Population Change 2000 - 2010 | | | | 0.7% | | 4.5% | | 105 | |
| Land Area (mi ²) | | | | 44.4 | | 19.3 | | 31 | |
| % Land Permanently Protected in Pinelands Area | | | | 28.9% | | *33.7% | | *28 | |
| Assessed Acres of Farmland 2010 | | | | *9,425 | | N/A | | N/A | |
| Building Permits 2011 | | | | 10 | | 19.7 | | 77 | |
| Residential Housing Transactions 2011 | | | | 88 | | 59 | | 39 | |
| Average Sale Price of Homes 2011 | | | | \$191,909 | | \$291,382 | | 129 | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$1,189.0 | | \$1,642 | | 78 | |
| Effective Tax Rate 2011 | | | | 2.15 | | 2.25 | | 117 | |
| Average Residential Property Tax Bill 2011 | | | | \$4,960 | | \$5,503 | | 113 | |
| Per Capita Income 2010 | | | | \$34,493 | | \$32,312 | | 58 | |
| Unemployment Rate 2011 | | | | 11.5% | | 10.6% | | 71 | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 2,075 | | | 256 | | | \$35,805.3 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 1.6% | 90.0% | 0.9% | 6.6% | 0.9% | 0.0% |

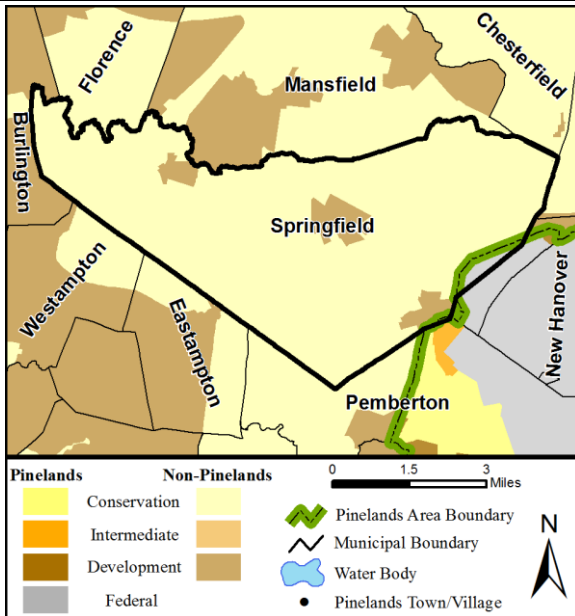
N/A – Due to limited data available

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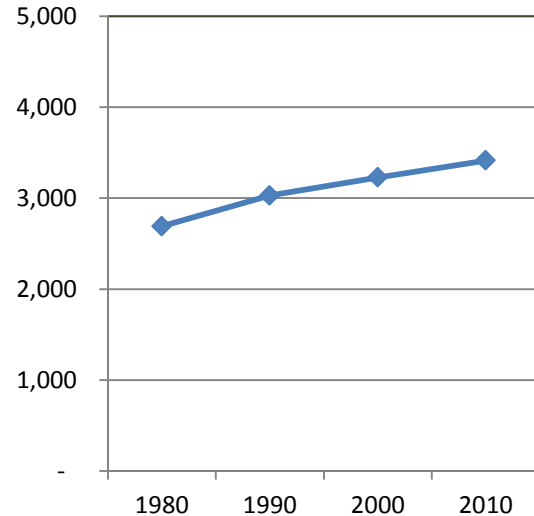
Springfield Township, Burlington County

2010 Census:

| | | |
|--|----|-----------------------------|
| % of population in Pinelands Area | 0% | (0 Residents / 3,376 total) |
| % of housing units in the Pinelands Area | 0% | (0 units / 1,201 total) |
| % of land in the Pinelands Area | 2% | (284 acres / 18,948 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| | | | | | | | | 100% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 3,420 | 12,006 | 135 | | | |
| Population Density 2011 (per mi ²) | | | | 115.5 | 1,806.5 | 179 | | | |
| Population Change 2000 - 2010 | | | | 5.8% | 4.5% | 70 | | | |
| Land Area (mi ²) | | | | 29.6 | 19.3 | 50 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | | |
| Assessed Acres of Farmland 2010 | | | | *176 | N/A | N/A | | | |
| Building Permits 2011 | | | | 2 | 19.7 | 129 | | | |
| Residential Housing Transactions 2011 | | | | 7 | 59 | 158 | | | |
| Average Sale Price of Homes 2011 | | | | \$236,571 | \$291,382 | 84 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$427.5 | \$1,642 | 132 | | | |
| Effective Tax Rate 2011 | | | | 2.34 | 2.25 | 102 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$7,219 | \$5,503 | 23 | | | |
| Per Capita Income 2010 | | | | \$37,901 | \$32,312 | 36 | | | |
| Unemployment Rate 2011 | | | | 8.5% | 10.6% | 137 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | | |
| 248 | | | 58 | | \$48,832.7 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.0% | 85.6% | 1.8% | 10.6% | 0.0% | 0.0% |

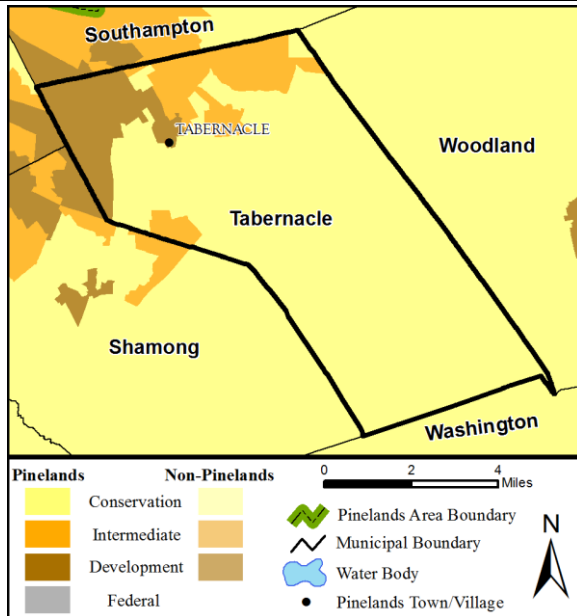
N/A – Due to limited data available

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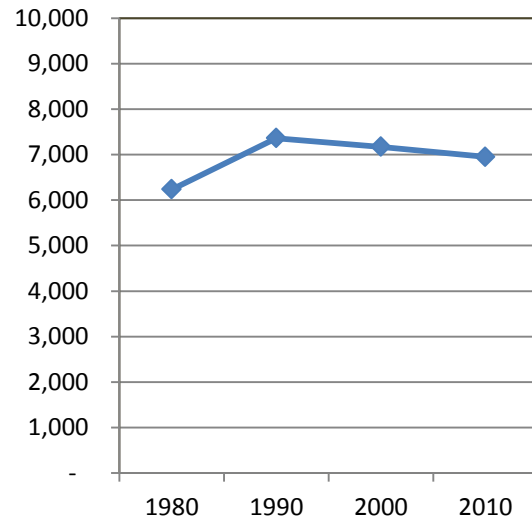
Tabernacle Township, Burlington County

2010 Census:

| | | |
|--|------|---------------------------------|
| % of population in Pinelands Area | 100% | (6,971 Residents / 6,971 total) |
| % of housing units in the Pinelands Area | 100% | (2,455 units / 2,455 total) |
| % of land in the Pinelands Area | 100% | (31,495 acres / 31,495 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| 51% | 3% | 11% | 15% | 10% | 9% | | 1% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 6,992 | 12,006 | 96 | | | |
| Population Density 2011 (per mi ²) | | | | 141.0 | 1,806.5 | 176 | | | |
| Population Change 2000 - 2010 | | | | -3.1% | 4.5% | 143 | | | |
| Land Area (mi ²) | | | | 49.6 | 19.3 | 25 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 44.3% | *33.7% | *21 | | | |
| Assessed Acres of Farmland 2010 | | | | *8,576 | N/A | N/A | | | |
| Building Permits 2011 | | | | 2 | 19.7 | 129 | | | |
| Residential Housing Transactions 2011 | | | | 46 | 59 | 69 | | | |
| Average Sale Price of Homes 2011 | | | | \$326,895 | \$291,382 | 37 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$759.3 | \$1,642 | 98 | | | |
| Effective Tax Rate 2011 | | | | 2.20 | 2.25 | 111 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$6,726 | \$5,503 | 38 | | | |
| Per Capita Income 2010 | | | | \$36,726 | \$32,312 | 42 | | | |
| Unemployment Rate 2011 | | | | 5.0% | 10.6% | 191 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | | |
| 961 | | | 164 | | \$29,601.5 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 1.2% | 95.4% | 0.4% | 2.8% | 0.1% | 0.0% |

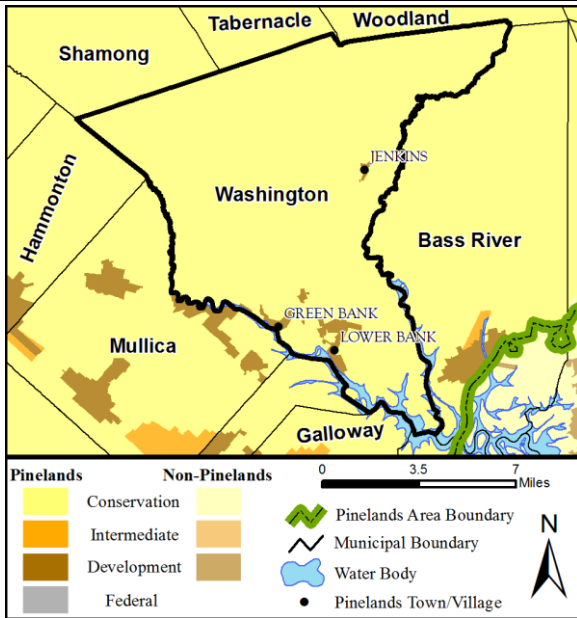
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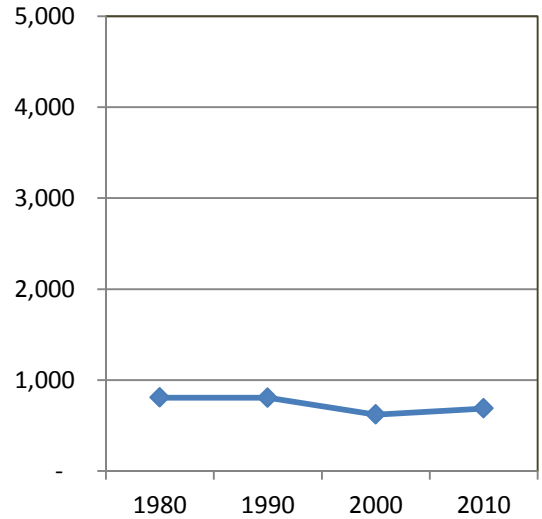
Washington Township, Burlington County

2010 Census:

| | | |
|--|------|-------------------------------|
| % of population in Pinelands Area | 100% | (793 Residents / 793 total) |
| % of housing units in the Pinelands Area | 100% | (349 units / 349 total) |
| % of land in the Pinelands Area | 100% | (66,774 acres / 66,774 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| 85% | | | 13% | | | | 2% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 689 | 12,006 | 192 | | | |
| Population Density 2011 (per mi ²) | | | | 6.6 | 1,806.5 | 202 | | | |
| Population Change 2000 - 2010 | | | | 10.6% | 4.5% | 50 | | | |
| Land Area (mi ²) | | | | 104.8 | 19.3 | 3 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 86.1% | *33.7% | *3 | | | |
| Assessed Acres of Farmland 2010 | | | | *8,194 | N/A | N/A | | | |
| Building Permits 2011 | | | | 2 | 19.7 | 129 | | | |
| Residential Housing Transactions 2011 | | | | 1 | 59 | 191 | | | |
| Average Sale Price of Homes 2011 | | | | \$207,500 | \$291,382 | 113 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$101.6 | \$1,642 | 190 | | | |
| Effective Tax Rate 2011 | | | | 1.39 | 2.25 | 172 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,481 | \$5,503 | 188 | | | |
| Per Capita Income 2010 | | | | \$24,808 | \$32,312 | 162 | | | |
| Unemployment Rate 2011 | | | | 13.8% | 10.6% | 39 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 72 | | | 22 | | | \$46,618.7 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 3.2% | 81.6% | 1.3% | 12.1% | 1.7% | 0.0% |

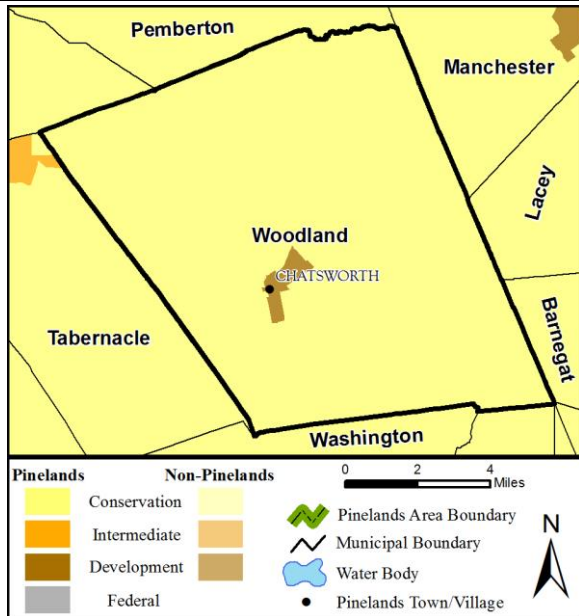
N/A – Due to limited data available

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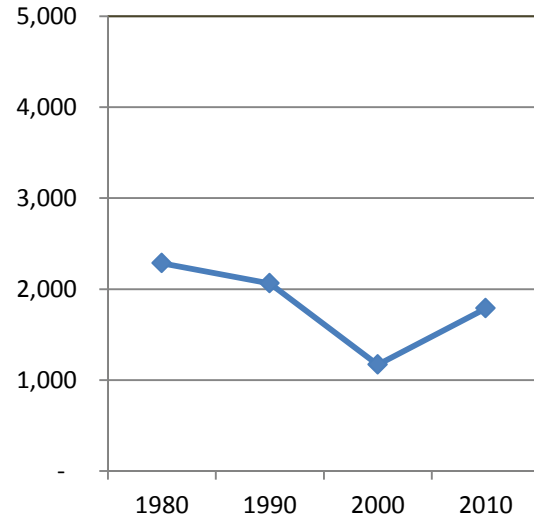
Woodland Township, Burlington County

2010 Census:

| | | |
|--|------|---------------------------------|
| % of population in Pinelands Area | 100% | (1,788 Residents / 1,788 total) |
| % of housing units in the Pinelands Area | 100% | (494 units / 494 total) |
| % of land in the Pinelands Area | 100% | (60,523 acres / 60,523 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| 70% | | | 29% | | | | 1% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 1,790 | 12,006 | 164 | | | |
| Population Density 2011 (per mi ²) | | | | 19.0 | 1,806.5 | 198 | | | |
| Population Change 2000 - 2010 | | | | 52.8% | 4.5% | 5 | | | |
| Land Area (mi ²) | | | | 94.4 | 19.3 | 7 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 76.3% | *33.7% | *5 | | | |
| Assessed Acres of Farmland 2010 | | | | *11,654 | N/A | N/A | | | |
| Building Permits 2011 | | | | 3 | 19.7 | 119 | | | |
| Residential Housing Transactions 2011 | | | | 5 | 59 | 174 | | | |
| Average Sale Price of Homes 2011 | | | | \$202,700 | \$291,382 | 118 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$161.5 | \$1,642 | 179 | | | |
| Effective Tax Rate 2011 | | | | 1.82 | 2.25 | 147 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,840 | \$5,503 | 120 | | | |
| Per Capita Income 2010 | | | | \$33,552 | \$32,312 | 67 | | | |
| Unemployment Rate 2011 | | | | 10.7% | 10.6% | 88 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | | |
| 336 | | | 65 | | \$43,151.6 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 5.1% | 85.3% | 0.6% | 3.5% | 5.4% | 0.0% |

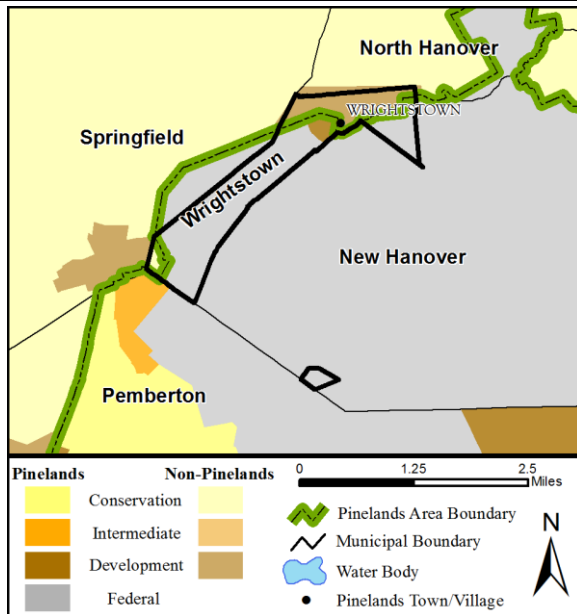
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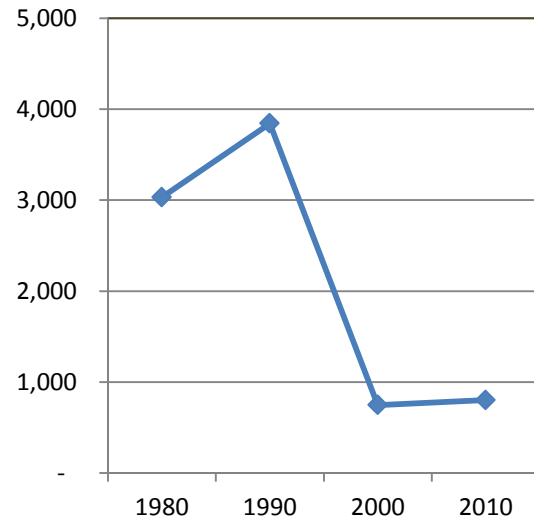
Wrightstown Borough, Burlington County

2010 Census:

| | | |
|--|-----|----------------------------|
| % of population in Pinelands Area | 10% | (81 Residents / 807 total) |
| % of housing units in the Pinelands Area | 11% | (40 units / 349 total) |
| % of land in the Pinelands Area | 76% | (897 acres / 1,179 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| | | | | | | 6% | | 95% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 804 | 12,006 | 191 | | | |
| Population Density 2011 (per mi ²) | | | | 446.7 | 1,806.5 | 137 | | | |
| Population Change 2000 - 2010 | | | | 7.2% | 4.5% | 63 | | | |
| Land Area (mi ²) | | | | 1.8 | 19.3 | 146 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | | |
| Assessed Acres of Farmland 2010 | | | | *17 | N/A | N/A | | | |
| Building Permits 2011 | | | | 0 | 19.7 | 170 | | | |
| Residential Housing Transactions 2011 | | | | 1 | 59 | 191 | | | |
| Average Sale Price of Homes 2011 | | | | \$282,000 | \$291,382 | 56 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$51.3 | \$1,642 | 197 | | | |
| Effective Tax Rate 2011 | | | | 1.98 | 2.25 | 134 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,913 | \$5,503 | 169 | | | |
| Per Capita Income 2010 | | | | \$24,231 | \$32,312 | 172 | | | |
| Unemployment Rate 2011 | | | | 13.0% | 10.6% | 48 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 608 | | | 68 | | | \$32,031.6 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 3.1% | 49.7% | 0.0% | 34.4% | 0.9% | 11.8% |

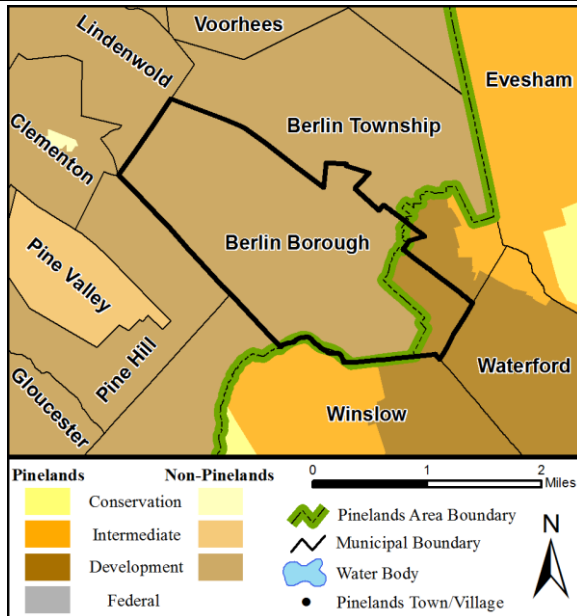
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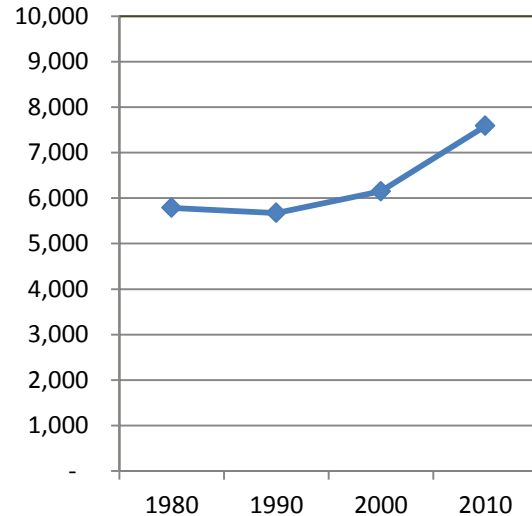
Berlin Borough, Camden County

2010 Census:

| | | |
|--|-----|------------------------------|
| % of population in Pinelands Area | 1% | (76 Residents / 7,588 total) |
| % of housing units in the Pinelands Area | 1% | (28 units / 2,949 total) |
| % of land in the Pinelands Area | 10% | (233 acres / 2,330 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | | | | | 100% | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 7,583 | 12,006 | 89 | | |
| Population Density 2011 (per mi ²) | | | | 2,106.4 | 1,806.5 | 71 | | |
| Population Change 2000 - 2010 | | | | 23.4% | 4.5% | 22 | | |
| Land Area (mi ²) | | | | 3.6 | 19.3 | 119 | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | |
| Assessed Acres of Farmland 2010 | | | | *9 | N/A | N/A | | |
| Building Permits 2011 | | | | 7 | 19.7 | 96 | | |
| Residential Housing Transactions 2011 | | | | 11 | 59 | 146 | | |
| Average Sale Price of Homes 2011 | | | | \$234,214 | \$291,382 | 87 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$803.0 | \$1,642 | 95 | | |
| Effective Tax Rate 2011 | | | | 2.54 | 2.25 | 73 | | |
| Average Residential Property Tax Bill 2011 | | | | \$6,324 | \$5,503 | 53 | | |
| Per Capita Income 2010 | | | | \$33,672 | \$32,312 | 66 | | |
| Unemployment Rate 2011 | | | | 8.6% | 10.6% | 136 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 4,080 | | | 392 | | \$36,697.1 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 2.6% | 79.1% | 0.0% | 15.9% | 1.4% | 1.1% |

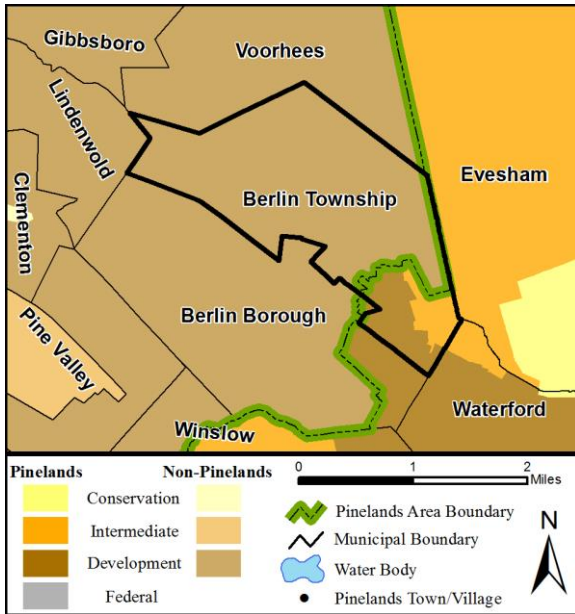
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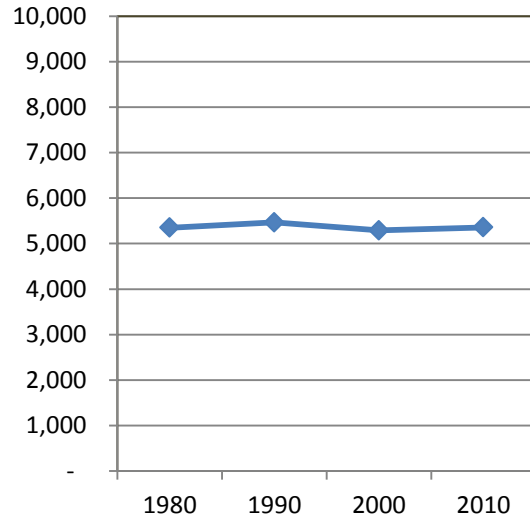
Berlin Township, Camden County

2010 Census:

| | | |
|--|-----|------------------------------|
| % of population in Pinelands Area | 6% | (303 Residents/ 5,357 total) |
| % of housing units in the Pinelands Area | 5% | (102 units / 2,069 total) |
| % of land in the Pinelands Area | 16% | (347 acres / 2,105 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | | | | 36% | 64% | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 5,353 | 12,006 | 107 | | |
| Population Density 2011 (per mi ²) | | | | 1,622.1 | 1,806.5 | 82 | | |
| Population Change 2000 - 2010 | | | | 1.3% | 4.5% | 101 | | |
| Land Area (mi ²) | | | | 3.3 | 19.3 | 122 | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | |
| Assessed Acres of Farmland 2010 | | | | *28 | N/A | N/A | | |
| Building Permits 2011 | | | | 17 | 19.7 | 52 | | |
| Residential Housing Transactions 2011 | | | | 15 | 59 | 128 | | |
| Average Sale Price of Homes 2011 | | | | \$173,150 | \$291,382 | 152 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$567.6 | \$1,642 | 114 | | |
| Effective Tax Rate 2011 | | | | 3.18 | 2.25 | 25 | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,478 | \$5,503 | 84 | | |
| Per Capita Income 2010 | | | | \$26,184 | \$32,312 | 149 | | |
| Unemployment Rate 2011 | | | | 6.2% | 10.6% | 183 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 4,858 | | | 389 | | \$37,307.5 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 3.0% | 52.7% | 0.0% | 34.1% | 9.1% | 1.1% |

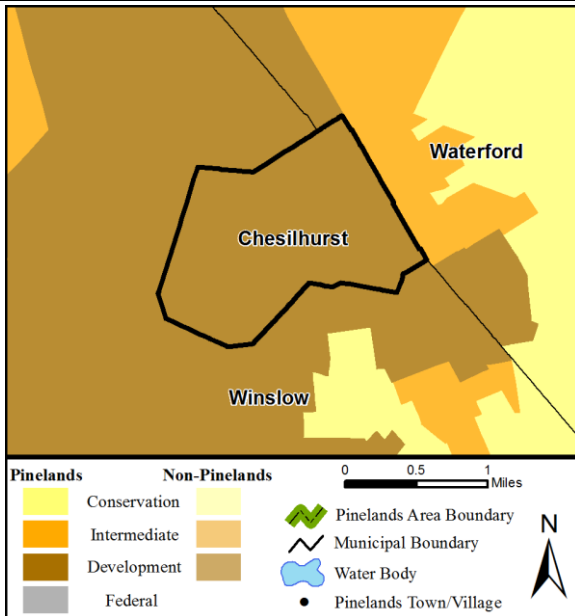
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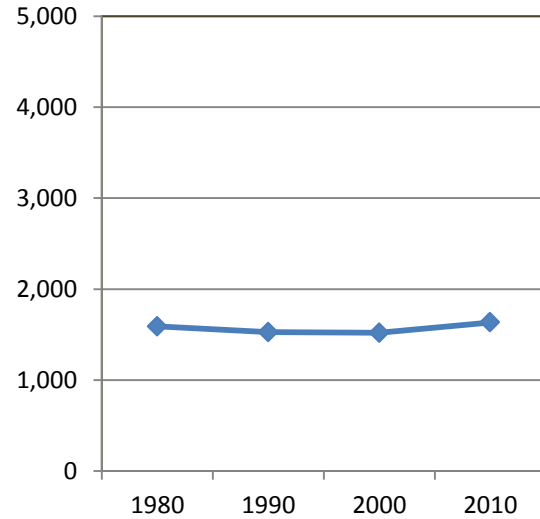
Chesilhurst Borough, Camden County

2010 Census:

| | | |
|--|------|---------------------------------|
| % of population in Pinelands Area | 100% | (1,634 Residents / 1,634 total) |
| % of housing units in the Pinelands Area | 100% | (621 units / 621 total) |
| % of land in the Pinelands Area | 100% | (1,105 acres / 1,105 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| | | | | | 100% | | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 1,633 | 12,006 | 169 | | | |
| Population Density 2011 (per mi ²) | | | | 960.6 | 1,806.5 | 107 | | | |
| Population Change 2000 - 2010 | | | | 7.5% | 4.5% | 62 | | | |
| Land Area (mi ²) | | | | 1.7 | 19.3 | 147 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | | |
| Assessed Acres of Farmland 2010 | | | | *0 | N/A | N/A | | | |
| Building Permits 2011 | | | | 4 | 19.7 | 111 | | | |
| Residential Housing Transactions 2011 | | | | 6 | 59 | 163 | | | |
| Average Sale Price of Homes 2011 | | | | \$157,167 | \$291,382 | 168 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$89.1 | \$1,642 | 192 | | | |
| Effective Tax Rate 2011 | | | | 2.90 | 2.25 | 40 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,736 | \$5,503 | 125 | | | |
| Per Capita Income 2010 | | | | \$24,646 | \$32,312 | 163 | | | |
| Unemployment Rate 2011 | | | | 15.6% | 10.6% | 21 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| - | | | - | | | - | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 7.9% | 85.6% | 0.0% | 5.2% | 0.9% | 0.5% |

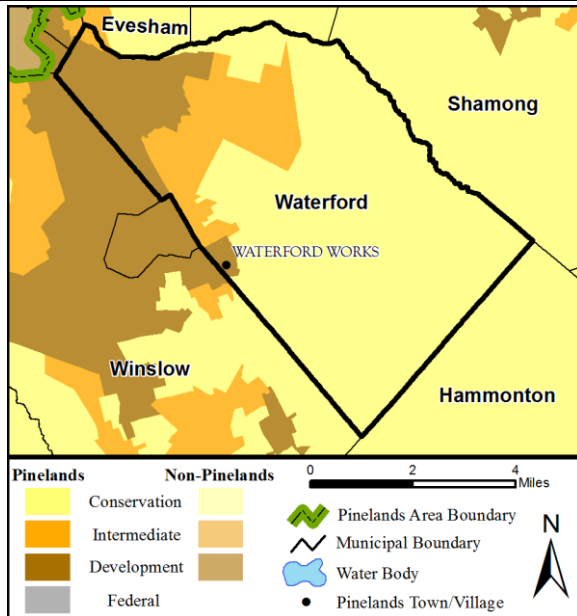
N/A – Due to limited data available

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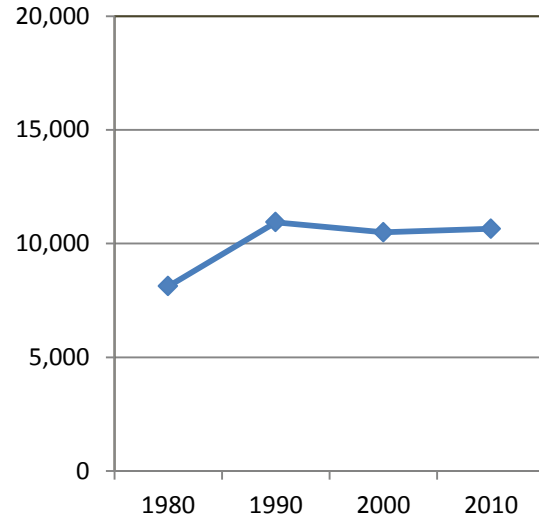
Waterford Township, Camden County

2010 Census:

| | | |
|--|------|-----------------------------------|
| % of population in Pinelands Area | 100% | (10,649 Residents / 10,649 total) |
| % of housing units in the Pinelands Area | 100% | (3,839 units / 3,839 total) |
| % of land in the Pinelands Area | 100% | (23,176 acres / 23,176 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 61% | 2% | 10% | | 15% | 11% | | 1% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 10,641 | 12,006 | 61 | | |
| Population Density 2011 (per mi ²) | | | | 294.0 | 1,806.5 | 152 | | |
| Population Change 2000 - 2010 | | | | 1.5% | 4.5% | 98 | | |
| Land Area (mi ²) | | | | 36.2 | 19.3 | 41 | | |
| % Land Permanently Protected in Pinelands Area | | | | 65.1% | *33.7% | *11 | | |
| Assessed Acres of Farmland 2010 | | | | *2,508 | N/A | N/A | | |
| Building Permits 2011 | | | | 22 | 19.7 | 45 | | |
| Residential Housing Transactions 2011 | | | | 32 | 59 | 92 | | |
| Average Sale Price of Homes 2011 | | | | \$200,627 | \$291,382 | 121 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$873.4 | \$1,642 | 92 | | |
| Effective Tax Rate 2011 | | | | 2.81 | 2.25 | 47 | | |
| Average Residential Property Tax Bill 2011 | | | | \$6,023 | \$5,503 | 63 | | |
| Per Capita Income 2010 | | | | \$31,193 | \$32,312 | 85 | | |
| Unemployment Rate 2011 | | | | 10.0% | 10.6% | 101 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 1,942 | | | 352 | | \$32,044.8 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 2.3% | 89.4% | 0.3% | 7.2% | 0.3% | 0.5% |

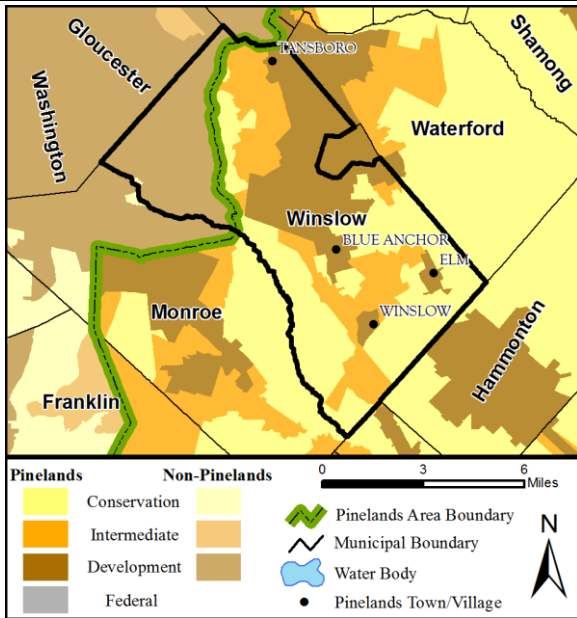
N/A – Due to limited data available

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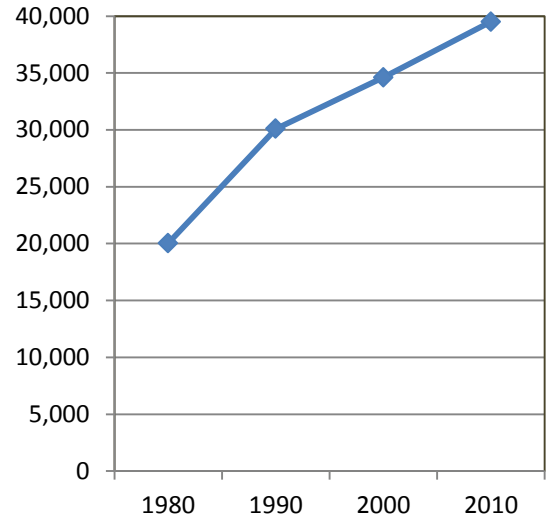
Winslow Township, Camden County

2010 Census:

| | | |
|--|-----|----------------------------------|
| % of population in Pinelands Area | 45% | (17,813 Residents/ 39,499 total) |
| % of housing units in the Pinelands Area | 44% | (6,442 units / 14,560 total) |
| % of land in the Pinelands Area | 81% | (30,096 acres / 37,339 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 2% | 22% | 23% | | 26% | 22% | | 6% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 39,466 | 12,006 | 16 | | |
| Population Density 2011 (per mi ²) | | | | 678.1 | 1,806.5 | 121 | | |
| Population Change 2000 - 2010 | | | | 14.1% | 4.5% | 40 | | |
| Land Area (mi ²) | | | | 58.2 | 19.3 | 17 | | |
| % Land Permanently Protected in Pinelands Area | | | | 28.0% | *33.7% | *29 | | |
| Assessed Acres of Farmland 2010 | | | | *5,659 | N/A | N/A | | |
| Building Permits 2011 | | | | 20 | 19.7 | 50 | | |
| Residential Housing Transactions 2011 | | | | 183 | 59 | 16 | | |
| Average Sale Price of Homes 2011 | | | | \$187,957 | \$291,382 | 138 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$2,818.9 | \$1,642 | 34 | | |
| Effective Tax Rate 2011 | | | | 2.80 | 2.25 | 49 | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,367 | \$5,503 | 87 | | |
| Per Capita Income 2010 | | | | \$27,884 | \$32,312 | 128 | | |
| Unemployment Rate 2011 | | | | 10.8% | 10.6% | 86 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 4,914 | | | 635 | | \$30,650.5 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 2.0% | 88.5% | 0.2% | 6.4% | 1.1% | 1.8% |

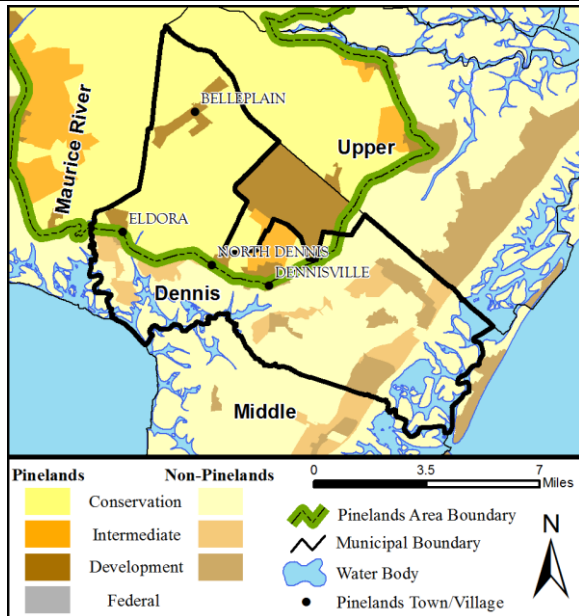
N/A – Due to limited data available

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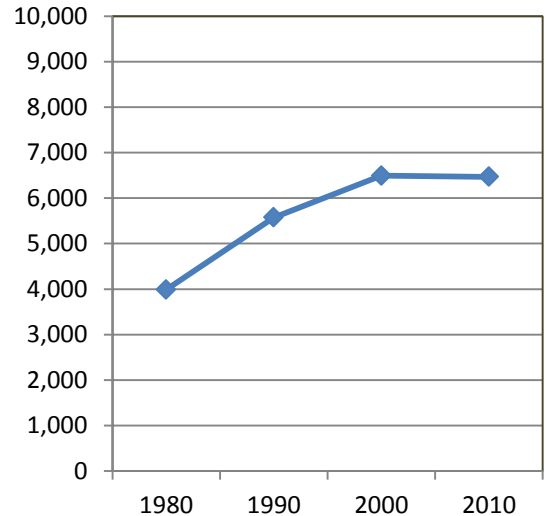
Dennis Township, Cape May County

2010 Census:

| | | |
|--|-----|--------------------------------|
| % of population in Pinelands Area | 24% | (1,570 Residents/ 6,465 total) |
| % of housing units in the Pinelands Area | 23% | (613 units / 2,671 total) |
| % of land in the Pinelands Area | 38% | (15,697 acres / 40,929 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| | 84% | | | 6% | | | 10% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 6,422 | 12,006 | 99 | | | |
| Population Density 2011 (per mi ²) | | | | 100.7 | 1,806.5 | 184 | | | |
| Population Change 2000 - 2010 | | | | -0.4% | 4.5% | 120 | | | |
| Land Area (mi ²) | | | | 63.8 | 19.3 | 15 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 68.1% | *33.7% | *9 | | | |
| Assessed Acres of Farmland 2010 | | | | *1,467 | N/A | N/A | | | |
| Building Permits 2011 | | | | 10 | 19.7 | 77 | | | |
| Residential Housing Transactions 2011 | | | | 22 | 59 | 106 | | | |
| Average Sale Price of Homes 2011 | | | | \$265,836 | \$291,382 | 65 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$922.9 | \$1,642 | 90 | | | |
| Effective Tax Rate 2011 | | | | 1.33 | 2.25 | 175 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$2,729 | \$5,503 | 197 | | | |
| Per Capita Income 2010 | | | | \$30,545 | \$32,312 | 93 | | | |
| Unemployment Rate 2011 | | | | 7.6% | 10.6% | 156 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | | |
| 1,602 | | | 182 | | \$34,766.8 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 5.5% | 79.3% | 0.1% | 15.1% | 0.0% | 0.0% |

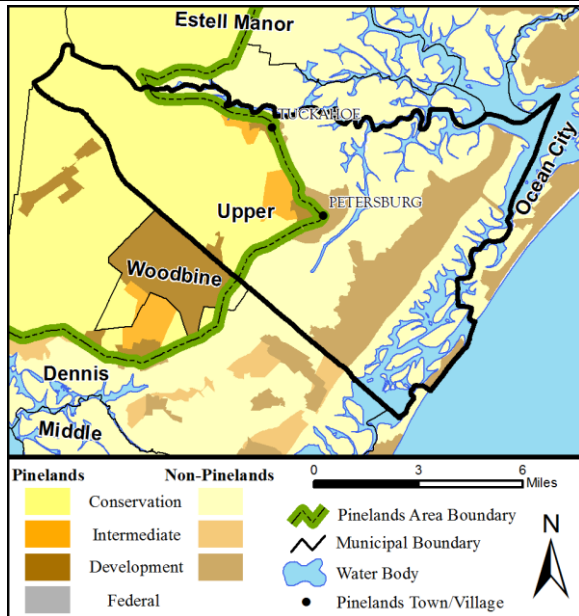
N/A – Due to limited data available

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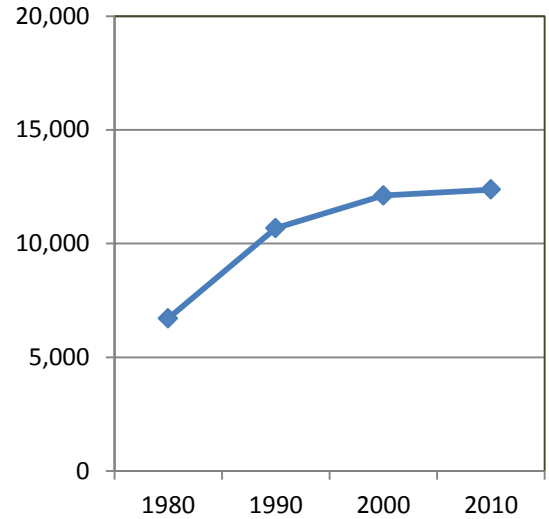
Upper Township, Cape May County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 11% | (1,306 Residents/ 12,373 total) |
| % of housing units in the Pinelands Area | 7% | (466 units / 6,341 total) |
| % of land in the Pinelands Area | 33% | (14,322 acres / 43,982 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | 87% | | | 8% | | 1% | 4% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 12,286 | 12,006 | 52 | | |
| Population Density 2011 (per mi ²) | | | | 179.6 | 1,806.5 | 171 | | |
| Population Change 2000 - 2010 | | | | 2.1% | 4.5% | 91 | | |
| Land Area (mi ²) | | | | 68.4 | 19.3 | 14 | | |
| % Land Permanently Protected in Pinelands Area | | | | 48.9% | *33.7% | *17 | | |
| Assessed Acres of Farmland 2010 | | | | *705 | N/A | N/A | | |
| Building Permits 2011 | | | | 12 | 19.7 | 69 | | |
| Residential Housing Transactions 2011 | | | | 78 | 59 | 46 | | |
| Average Sale Price of Homes 2011 | | | | \$344,332 | \$291,382 | 32 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$2,141.5 | \$1,642 | 47 | | |
| Effective Tax Rate 2011 | | | | 1.35 | 2.25 | 173 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,383 | \$5,503 | 151 | | |
| Per Capita Income 2010 | | | | \$38,702 | \$32,312 | 33 | | |
| Unemployment Rate 2011 | | | | 3.9% | 10.6% | 195 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 2,525 | | | 315 | | \$39,129.9 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 4.0% | 85.8% | 0.0% | 9.1% | 1.1% | 0.0% |

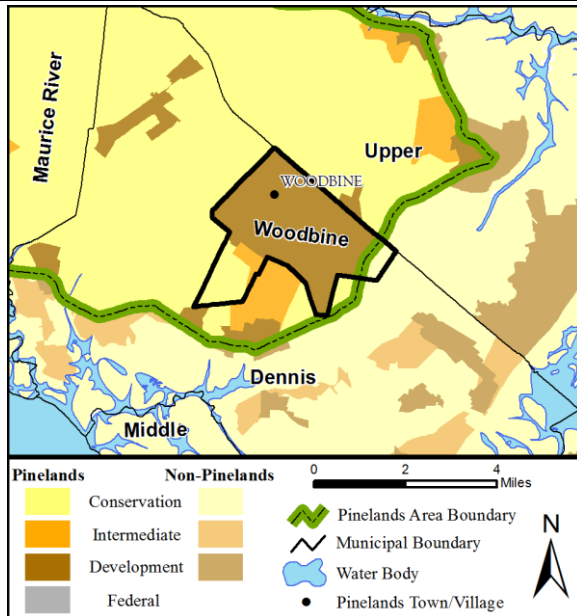
N/A – Due to limited data available

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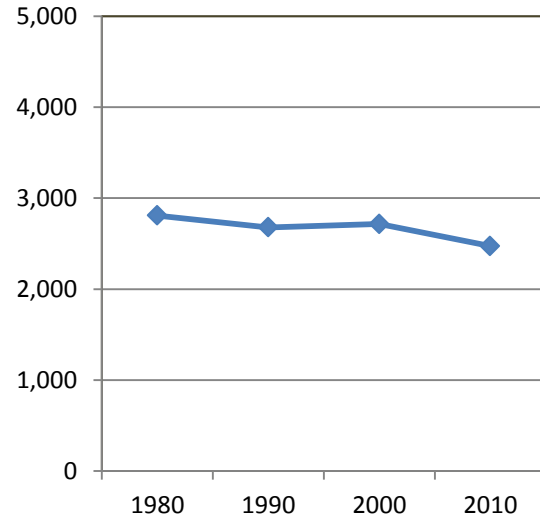
Woodbine Borough, Cape May County

2010 Census:

| | | |
|--|-----|--------------------------------|
| % of population in Pinelands Area | 99% | (2,465 Residents/ 2,472 total) |
| % of housing units in the Pinelands Area | 99% | (1,078 units / 1,079 total) |
| % of land in the Pinelands Area | 95% | (4,801 acres / 5,049 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|------------------------------------|---------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| | 13% | | | 4% | | 83% | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 2,459 | 12,006 | 153 | | | |
| Population Density 2011 (per mi ²) | | | | 307.4 | 1,806.5 | 150 | | | |
| Population Change 2000 - 2010 | | | | -9.0% | 4.5% | 176 | | | |
| Land Area (mi ²) | | | | 8.0 | 19.3 | 100 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 6.4% | *33.7% | *38 | | | |
| Assessed Acres of Farmland 2010 | | | | *290 | N/A | N/A | | | |
| Building Permits 2011 | | | | 3 | 19.7 | 119 | | | |
| Residential Housing Transactions 2011 | | | | 1 | 59 | 191 | | | |
| Average Sale Price of Homes 2011 | | | | \$299,999 | \$291,382 | 48 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$180.3 | \$1,642 | 176 | | | |
| Effective Tax Rate 2011 | | | | 1.17 | 2.25 | 180 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$1,464 | \$5,503 | 201 | | | |
| Per Capita Income 2010 | | | | \$15,734 | \$32,312 | 196 | | | |
| Unemployment Rate 2011 | | | | 12.9% | 10.6% | 51 | | | |
| Private Sector Employment 2010 | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | | |
| 554 | | 80 | | | \$37,920.4 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 4.7% | 76.7% | 0.1% | 13.7% | 2.6% | 2.2% |

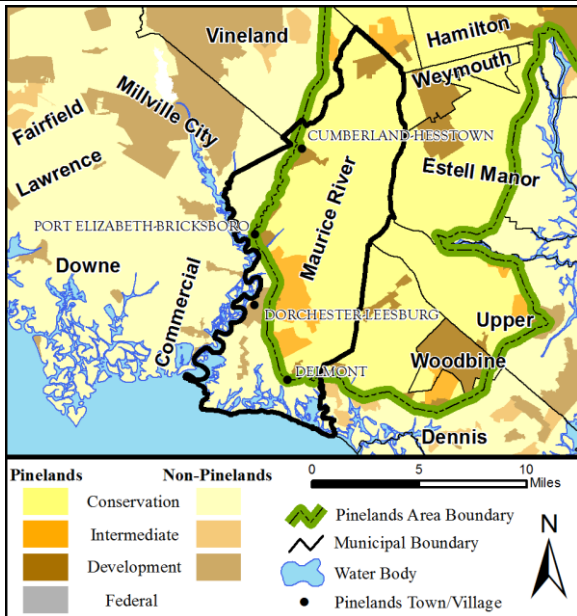
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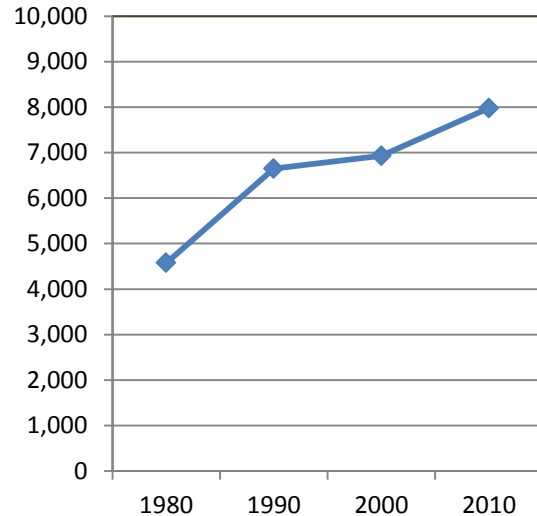
Maurice River Township, Cumberland County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 74% | (5,897 Residents / 7,972 total) |
| % of housing units in the Pinelands Area | 40% | (608 units / 1,502 total) |
| % of land in the Pinelands Area | 70% | (42,009 acres / 60,281 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|------------------------------------|---------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| | 83% | | | 11% | | | 6% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 7,696 | 12,006 | 86 | | | |
| Population Density 2011 (per mi ²) | | | | 80.8 | 1,806.5 | 189 | | | |
| Population Change 2000 - 2010 | | | | 15.1% | 4.5% | 37 | | | |
| Land Area (mi ²) | | | | 95.2 | 19.3 | 6 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 50.1% | *33.7% | *16 | | | |
| Assessed Acres of Farmland 2010 | | | | *6,509 | N/A | N/A | | | |
| Building Permits 2011 | | | | 7 | 19.7 | 96 | | | |
| Residential Housing Transactions 2011 | | | | 13 | 59 | 139 | | | |
| Average Sale Price of Homes 2011 | | | | \$219,454 | \$291,382 | 106 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$340.3 | \$1,642 | 139 | | | |
| Effective Tax Rate 2011 | | | | 1.98 | 2.25 | 132 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,907 | \$5,503 | 171 | | | |
| Per Capita Income 2010 | | | | \$15,705 | \$32,312 | 197 | | | |
| Unemployment Rate 2011 | | | | 10.1% | 10.6% | 100 | | | |
| Private Sector Employment 2010 | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | | |
| 197 | | 30 | | | \$27,126.8 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 7.8% | 82.5% | 0.6% | 6.4% | 2.4% | 0.2% |

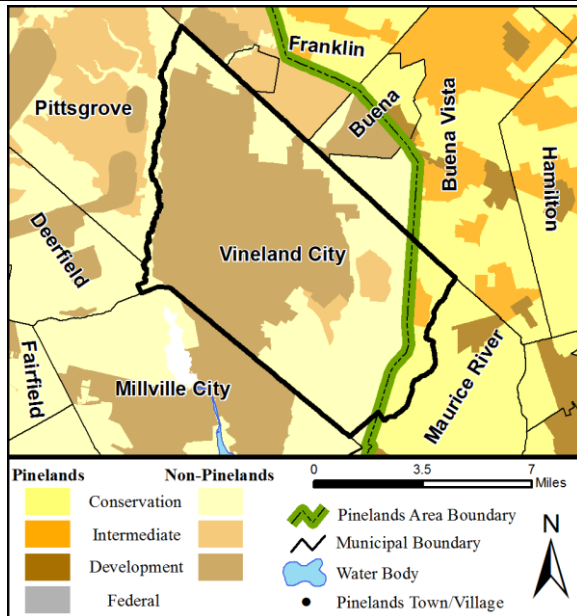
N/A – Due to limited data available

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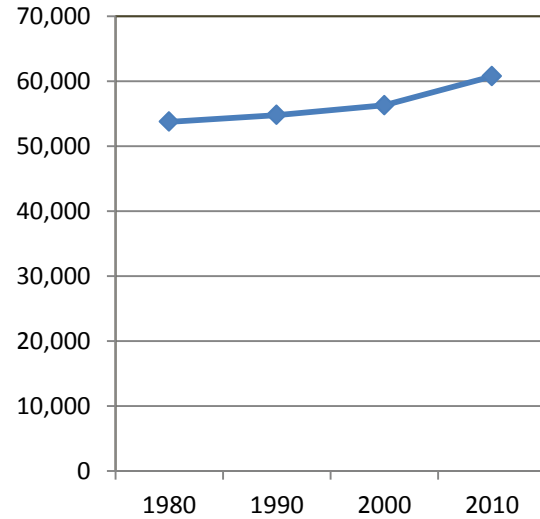
Vineland City, Cumberland County

2010 Census:

| | | |
|--|------|--------------------------------|
| % of population in Pinelands Area | < 1% | (156 Residents / 60,724 total) |
| % of housing units in the Pinelands Area | < 1% | (45 units / 22,661 total) |
| % of land in the Pinelands Area | 7% | (3,287 acres / 44,229 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | 73% | 8% | | 19% | | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 60,952 | 12,006 | 7 | | |
| Population Density 2011 (per mi ²) | | | | 883.4 | 1,806.5 | 113 | | |
| Population Change 2000 - 2010 | | | | 7.9% | 4.5% | 59 | | |
| Land Area (mi ²) | | | | 69.0 | 19.3 | 13 | | |
| % Land Permanently Protected in Pinelands Area | | | | 78.5% | *33.7% | *4 | | |
| Assessed Acres of Farmland 2010 | | | | *673 | N/A | N/A | | |
| Building Permits 2011 | | | | 79 | 19.7 | 14 | | |
| Residential Housing Transactions 2011 | | | | 196 | 59 | 15 | | |
| Average Sale Price of Homes 2011 | | | | \$168,467 | \$291,382 | 160 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$4,106.8 | \$1,642 | 20 | | |
| Effective Tax Rate 2011 | | | | 2.11 | 2.25 | 121 | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,879 | \$5,503 | 172 | | |
| Per Capita Income 2010 | | | | \$24,512 | \$32,312 | 168 | | |
| Unemployment Rate 2011 | | | | 13.3% | 10.6% | 45 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 24,679 | | | 1,690 | | \$39,456.0 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 1.3% | 71.6% | 0.2% | 18.7% | 6.1% | 2.1% |

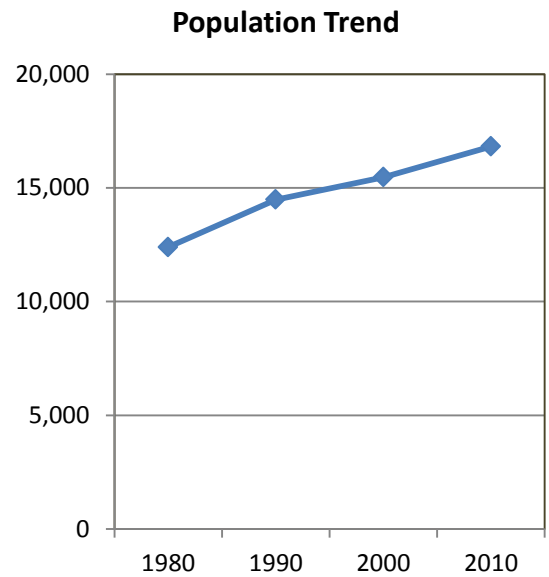
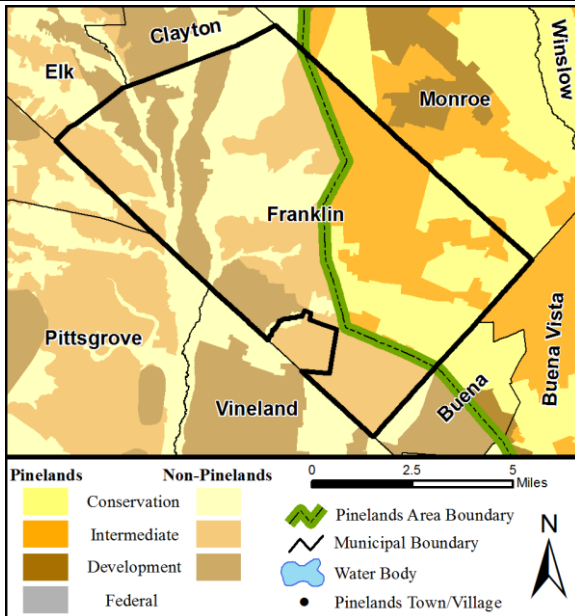
N/A – Due to limited data available

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Franklin Township, Gloucester County

2010 Census:

| | | |
|--|-----|----------------------------------|
| % of population in Pinelands Area | 16% | (2,616 Residents / 16,816 total) |
| % of housing units in the Pinelands Area | 16% | (955 units / 6,103 total) |
| % of land in the Pinelands Area | 36% | (12,835 acres / 36,102 total) |



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|-----------------|---------------------------------------|-------------------|---------------------------|------------|
| | | 41% | | 59% | | | | | |
| | | | | Municipal Value | | South N.J. Municipal Average | | South N.J. Municipal Rank | |
| Population Estimate 2011 | | | | 16,869 | | 12,006 | | 43 | |
| Population Density 2011 (per mi ²) | | | | 299.1 | | 1,806.5 | | 151 | |
| Population Change 2000 - 2010 | | | | 8.8% | | 4.5% | | 57 | |
| Land Area (mi ²) | | | | 56.4 | | 19.3 | | 19 | |
| % Land Permanently Protected in Pinelands Area | | | | 29.9% | | *33.7% | | *27 | |
| Assessed Acres of Farmland 2010 | | | | *4,742 | | N/A | | N/A | |
| Building Permits 2011 | | | | 14 | | 19.7 | | 60 | |
| Residential Housing Transactions 2011 | | | | 59 | | 59 | | 56 | |
| Average Sale Price of Homes 2011 | | | | \$207,193 | | \$291,382 | | 114 | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$1,380.9 | | \$1,642 | | 68 | |
| Effective Tax Rate 2011 | | | | 2.47 | | 2.25 | | 82 | |
| Average Residential Property Tax Bill 2011 | | | | \$5,143 | | \$5,503 | | 101 | |
| Per Capita Income 2010 | | | | \$32,141 | | \$32,312 | | 76 | |
| Unemployment Rate 2011 | | | | 12.4% | | 10.6% | | 57 | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 1,592 | | | 239 | | | \$34,951.2 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.9% | 88.3% | 0.7% | 7.8% | 0.0% | 0.2% |

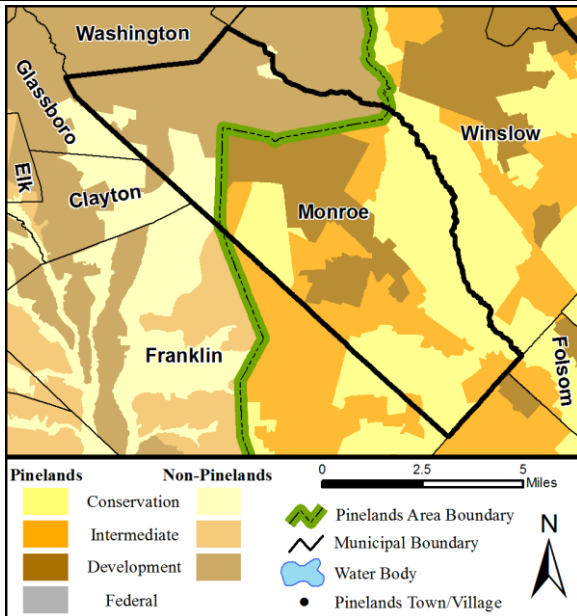
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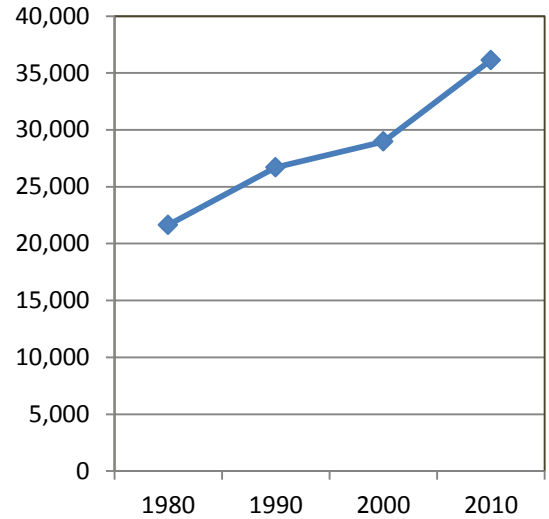
Monroe Township, Gloucester County

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 49% | (17,871 Residents / 36,129 total) |
| % of housing units in the Pinelands Area | 49% | (6,577 units / 13,387 total) |
| % of land in the Pinelands Area | 69% | (20,770 acres / 30,001 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| | 36% | 11% | | 25% | 28% | | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 36,232 | 12,006 | 18 | | | |
| Population Density 2011 (per mi ²) | | | | 772.5 | 1,806.5 | 117 | | | |
| Population Change 2000 - 2010 | | | | 24.7% | 4.5% | 21 | | | |
| Land Area (mi ²) | | | | 46.9 | 19.3 | 27 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 24.5% | *33.7% | *31 | | | |
| Assessed Acres of Farmland 2010 | | | | *3,762 | N/A | N/A | | | |
| Building Permits 2011 | | | | 63 | 19.7 | 20 | | | |
| Residential Housing Transactions 2011 | | | | 117 | 59 | 32 | | | |
| Average Sale Price of Homes 2011 | | | | \$202,909 | \$291,382 | 117 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$2,775.0 | \$1,642 | 35 | | | |
| Effective Tax Rate 2011 | | | | 2.94 | 2.25 | 36 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$6,419 | \$5,503 | 51 | | | |
| Per Capita Income 2010 | | | | \$28,270 | \$32,312 | 121 | | | |
| Unemployment Rate 2011 | | | | 10.3% | 10.6% | 97 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 5,432 | | | 615 | | | \$33,299.3 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.7% | 85.4% | 0.1% | 10.1% | 0.5% | 1.2% |

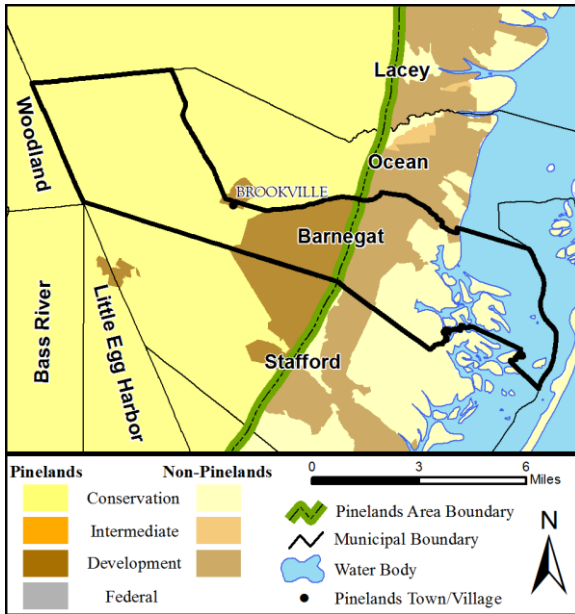
N/A – Due to limited data available

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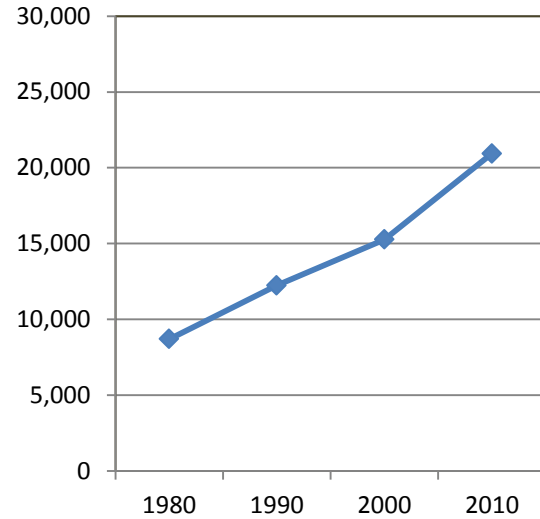
Barnegat Township, Ocean County

2010 Census:

| | | |
|--|-----|----------------------------------|
| % of population in Pinelands Area | 34% | (7,008 Residents / 20,735 total) |
| % of housing units in the Pinelands Area | 41% | (3,725 units / 9,008 total) |
| % of land in the Pinelands Area | 56% | (14,357 acres / 25,721 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 40% | 37% | | | | 23% | | < 1% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 21,037 | 12,006 | 33 | | |
| Population Density 2011 (per mi ²) | | | | 522.0 | 1,806.5 | 131 | | |
| Population Change 2000 - 2010 | | | | 37.1% | 4.5% | 9 | | |
| Land Area (mi ²) | | | | 40.3 | 19.3 | 36 | | |
| % Land Permanently Protected in Pinelands Area | | | | 61.2% | *33.7% | *13 | | |
| Assessed Acres of Farmland 2010 | | | | *101 | N/A | N/A | | |
| Building Permits 2011 | | | | 51 | 19.7 | 26 | | |
| Residential Housing Transactions 2011 | | | | 35 | 59 | 87 | | |
| Average Sale Price of Homes 2011 | | | | \$244,900 | \$291,382 | 78 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$2,438.5 | \$1,642 | 42 | | |
| Effective Tax Rate 2011 | | | | 2.20 | 2.25 | 112 | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,707 | \$5,503 | 76 | | |
| Per Capita Income 2010 | | | | \$29,192 | \$32,312 | 110 | | |
| Unemployment Rate 2011 | | | | 9.5% | 10.6% | 114 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 1,495 | | | 251 | | \$30,495.7 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 5.1% | 87.1% | 0.0% | 6.1% | 0.3% | 1.5% |

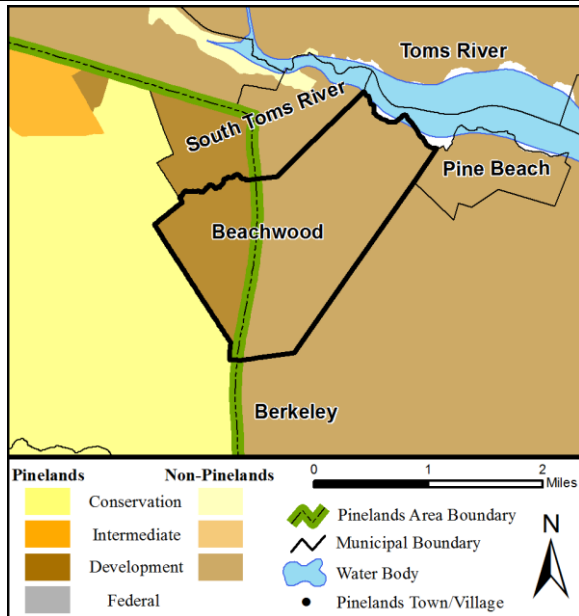
N/A – Due to limited data available

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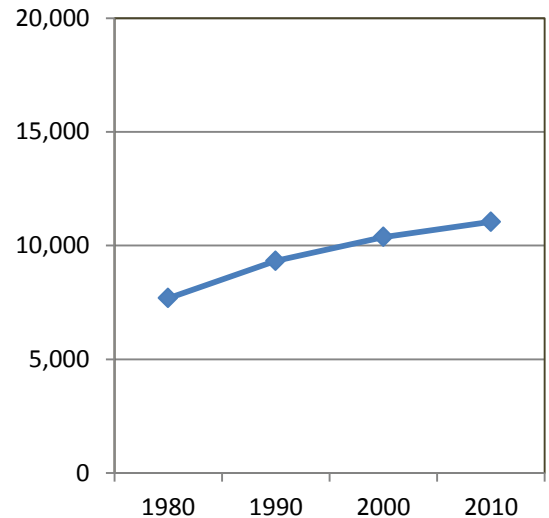
Beachwood Borough, Ocean County

2010 Census:

| | | |
|--|------|------------------------------|
| % of population in Pinelands Area | < 1% | (2 Residents / 11,015 total) |
| % of housing units in the Pinelands Area | < 1% | (1 unit / 3,811 total) |
| % of land in the Pinelands Area | 28% | (500 acres / 1,773 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| | | | | | 100% | | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 11,099 | 12,006 | 59 | | | |
| Population Density 2011 (per mi ²) | | | | 3,963.9 | 1,806.5 | 28 | | | |
| Population Change 2000 - 2010 | | | | 6.5% | 4.5% | 69 | | | |
| Land Area (mi ²) | | | | 2.8 | 19.3 | 127 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 67.6% | *33.7% | *10 | | | |
| Assessed Acres of Farmland 2010 | | | | *0 | N/A | N/A | | | |
| Building Permits 2011 | | | | 9 | 19.7 | 83 | | | |
| Residential Housing Transactions 2011 | | | | 42 | 59 | 75 | | | |
| Average Sale Price of Homes 2011 | | | | \$223,219 | \$291,382 | 100 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$968.0 | \$1,642 | 88 | | | |
| Effective Tax Rate 2011 | | | | 1.78 | 2.25 | 152 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,395 | \$5,503 | 149 | | | |
| Per Capita Income 2010 | | | | \$28,366 | \$32,312 | 119 | | | |
| Unemployment Rate 2011 | | | | 10.7% | 10.6% | 87 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 569 | | | 112 | | | \$34,716.8 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 1.7% | 94.9% | 0.0% | 3.3% | 0.0% | 0.2% |

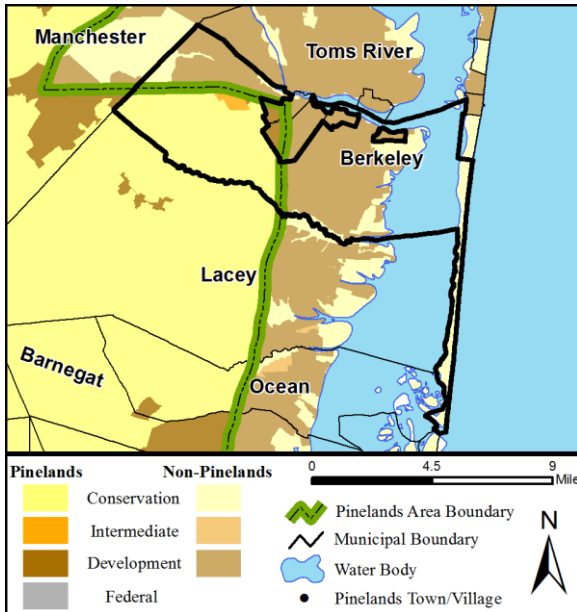
N/A – Due to limited data available

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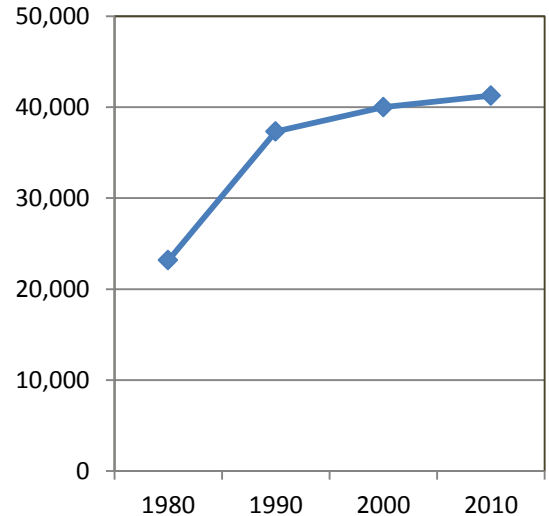
Berkeley Township, Ocean County

2010 Census:

| | | |
|--|-----|----------------------------------|
| % of population in Pinelands Area | 5% | (2,112 Residents / 41,216 total) |
| % of housing units in the Pinelands Area | 6% | (1,422 units / 23,804 total) |
| % of land in the Pinelands Area | 30% | (10,484 acres / 34,761 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| 18% | 70% | 7% | | 5% | < 1% | | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 41,455 | 12,006 | 14 | | | |
| Population Density 2011 (per mi ²) | | | | 766.3 | 1,806.5 | 118 | | | |
| Population Change 2000 - 2010 | | | | 3.2% | 4.5% | 85 | | | |
| Land Area (mi ²) | | | | 54.1 | 19.3 | 22 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 74.6% | *33.7% | *7 | | | |
| Assessed Acres of Farmland 2010 | | | | *26 | N/A | N/A | | | |
| Building Permits 2011 | | | | 55 | 19.7 | 24 | | | |
| Residential Housing Transactions 2011 | | | | 239 | 59 | 9 | | | |
| Average Sale Price of Homes 2011 | | | | \$229,913 | \$291,382 | 91 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$5,585.0 | \$1,642 | 11 | | | |
| Effective Tax Rate 2011 | | | | 1.67 | 2.25 | 157 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,652 | \$5,503 | 184 | | | |
| Per Capita Income 2010 | | | | \$28,168 | \$32,312 | 123 | | | |
| Unemployment Rate 2011 | | | | 14.9% | 10.6% | 29 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 3,183 | | | 392 | | | \$31,743.2 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.6% | 89.5% | 0.0% | 6.3% | 0.5% | 1.1% |

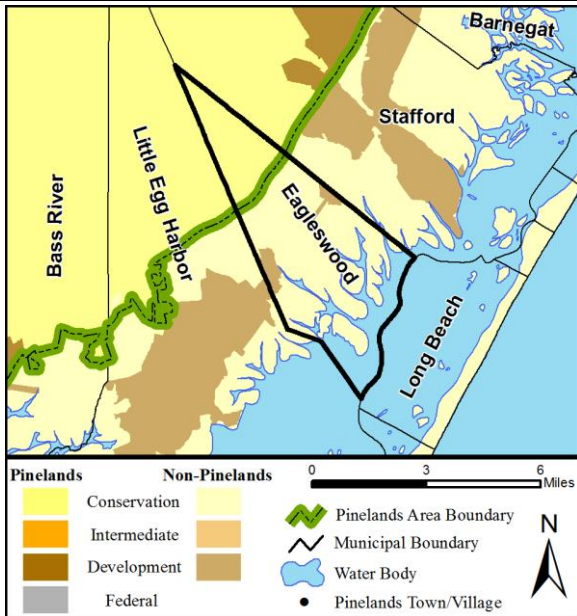
N/A – Due to limited data available

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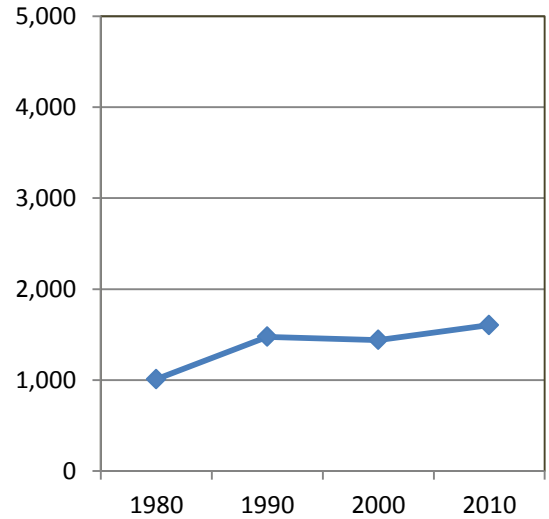
Eagleswood Township, Ocean County

2010 Census:

| | | |
|--|-----|------------------------------|
| % of population in Pinelands Area | 0% | (0 Residents / 1,662 total) |
| % of housing units in the Pinelands Area | 0% | (0 units / 781 total) |
| % of land in the Pinelands Area | 20% | (2,435 acres / 12,041 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| 44% | 56% | | | | | | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 1,610 | 12,006 | 170 | | | |
| Population Density 2011 (per mi ²) | | | | 85.2 | 1,806.5 | 188 | | | |
| Population Change 2000 - 2010 | | | | 11.2% | 4.5% | 48 | | | |
| Land Area (mi ²) | | | | 18.9 | 19.3 | 68 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 88.1% | *33.7% | *1 | | | |
| Assessed Acres of Farmland 2010 | | | | *55 | N/A | N/A | | | |
| Building Permits 2011 | | | | 10 | 19.7 | 77 | | | |
| Residential Housing Transactions 2011 | | | | 7 | 59 | 158 | | | |
| Average Sale Price of Homes 2011 | | | | \$222,643 | \$291,382 | 101 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$272.1 | \$1,642 | 154 | | | |
| Effective Tax Rate 2011 | | | | 1.77 | 2.25 | 153 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,054 | \$5,503 | 109 | | | |
| Per Capita Income 2010 | | | | \$28,135 | \$32,312 | 124 | | | |
| Unemployment Rate 2011 | | | | 9.3% | 10.6% | 119 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 788 | | | 84 | | | \$52,381.0 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 12.2% | 74.4% | 0.0% | 11.8% | 1.4% | 0.2% |

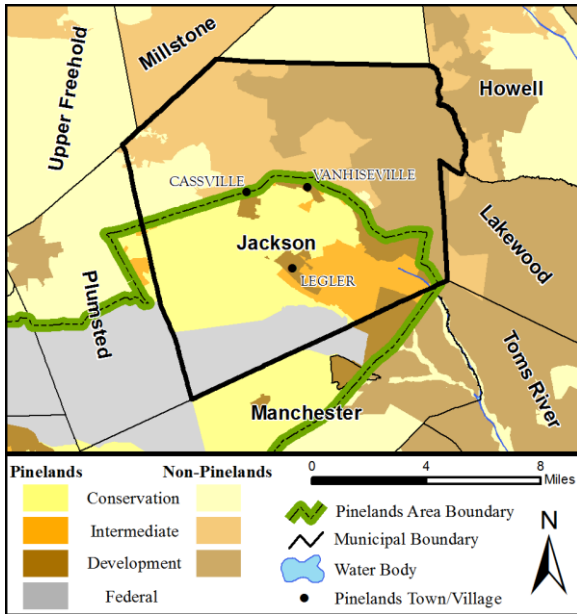
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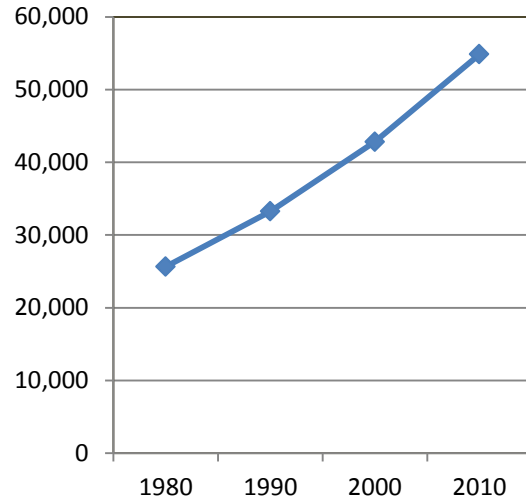
Jackson Township, Ocean County

2010 Census:

| | | |
|--|-----|----------------------------------|
| % of population in Pinelands Area | 9% | (4,832 Residents / 54,888 total) |
| % of housing units in the Pinelands Area | 9% | (1,892 units / 20,354 total) |
| % of land in the Pinelands Area | 47% | (30,385 acres / 64,495 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 31% | 20% | | | 17% | 7% | | 5% | 20% |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 55,129 | 12,006 | 8 | | |
| Population Density 2011 (per mi ²) | | | | 548.0 | 1,806.5 | 128 | | |
| Population Change 2000 - 2010 | | | | 28.1% | 4.5% | 17 | | |
| Land Area (mi ²) | | | | 100.6 | 19.3 | 4 | | |
| % Land Permanently Protected in Pinelands Area | | | | 47.4% | *33.7% | *20 | | |
| Assessed Acres of Farmland 2010 | | | | *2,023 | N/A | N/A | | |
| Building Permits 2011 | | | | 89 | 19.7 | 10 | | |
| Residential Housing Transactions 2011 | | | | 249 | 59 | 8 | | |
| Average Sale Price of Homes 2011 | | | | \$317,262 | \$291,382 | 40 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$6,811.5 | \$1,642 | 9 | | |
| Effective Tax Rate 2011 | | | | 1.93 | 2.25 | 136 | | |
| Average Residential Property Tax Bill 2011 | | | | \$6,458 | \$5,503 | 48 | | |
| Per Capita Income 2010 | | | | \$34,521 | \$32,312 | 56 | | |
| Unemployment Rate 2011 | | | | 9.0% | 10.6% | 126 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 8,445 | | | 833 | | \$27,519.5 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 3.2% | 86.5% | 0.0% | 8.3% | 0.7% | 1.4% |

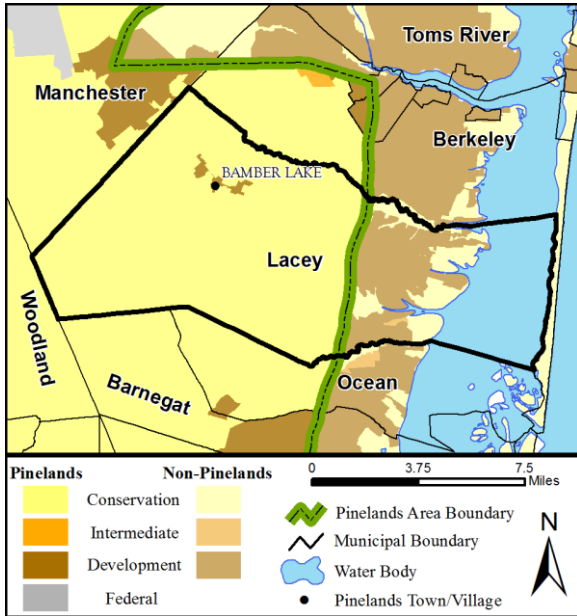
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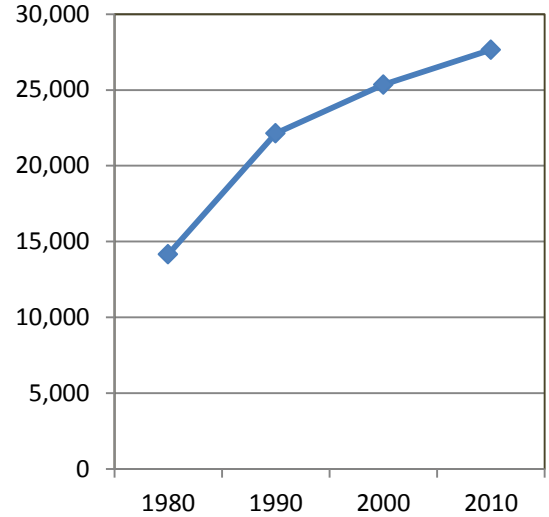
Lacey Township, Ocean County

2010 Census:

| | | |
|--|-----|--------------------------------|
| % of population in Pinelands Area | 2% | (550 Residents / 27,647 total) |
| % of housing units in the Pinelands Area | 2% | (191 units / 11,575 total) |
| % of land in the Pinelands Area | 67% | (42,688 acres / 63,716 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|------------------------------------|---------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| 71% | 28% | | | | | | 1% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 27,781 | 12,006 | 25 | | | |
| Population Density 2011 (per mi ²) | | | | 278.6 | 1,806.5 | 153 | | | |
| Population Change 2000 - 2010 | | | | 9.1% | 4.5% | 55 | | | |
| Land Area (mi ²) | | | | 99.7 | 19.3 | 5 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 74.7% | *33.7% | *6 | | | |
| Assessed Acres of Farmland 2010 | | | | *4,195 | N/A | N/A | | | |
| Building Permits 2011 | | | | 45 | 19.7 | 29 | | | |
| Residential Housing Transactions 2011 | | | | 159 | 59 | 21 | | | |
| Average Sale Price of Homes 2011 | | | | \$298,773 | \$291,382 | 49 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$4,087.2 | \$1,642 | 21 | | | |
| Effective Tax Rate 2011 | | | | 1.55 | 2.25 | 163 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,667 | \$5,503 | 130 | | | |
| Per Capita Income 2010 | | | | \$31,552 | \$32,312 | 83 | | | |
| Unemployment Rate 2011 | | | | 10.1% | 10.6% | 99 | | | |
| Private Sector Employment 2010 | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | | |
| 4,999 | | 563 | | | \$41,912.1 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.8% | 84.0% | 0.0% | 7.9% | 5.2% | 0.1% |

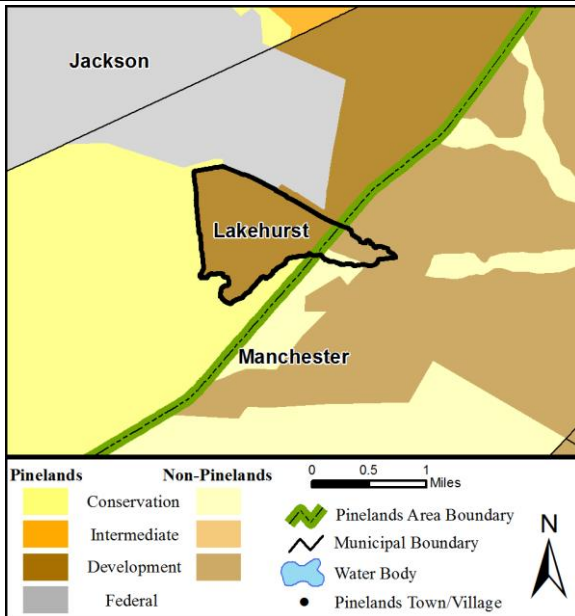
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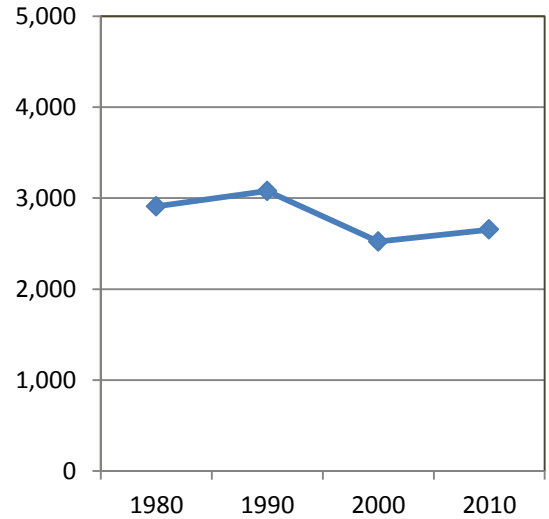
Lakehurst Borough, Ocean County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 96% | (2,535 Residents / 2,654 total) |
| % of housing units in the Pinelands Area | 93% | (875 units / 943 total) |
| % of land in the Pinelands Area | 87% | (551 acres / 633 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|-----------------|---------------------------------------|---------------------------|--------------------|------------|
| | | | | | | 100% | | | |
| | | | | Municipal Value | | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 2,668 | | 12,006 | 149 | | |
| Population Density 2011 (per mi ²) | | | | 2,668.0 | | 1,806.5 | 53 | | |
| Population Change 2000 - 2010 | | | | 5.2% | | 4.5% | 74 | | |
| Land Area (mi ²) | | | | 1.0 | | 19.3 | 171 | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.9% | | *33.7% | *43 | | |
| Assessed Acres of Farmland 2010 | | | | *0 | | N/A | N/A | | |
| Building Permits 2011 | | | | 0 | | 19.7 | 170 | | |
| Residential Housing Transactions 2011 | | | | 6 | | 59 | 163 | | |
| Average Sale Price of Homes 2011 | | | | \$171,167 | | \$291,382 | 156 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$181.7 | | \$1,642 | 175 | | |
| Effective Tax Rate 2011 | | | | 2.07 | | 2.25 | 125 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,404 | | \$5,503 | 148 | | |
| Per Capita Income 2010 | | | | \$27,171 | | \$32,312 | 138 | | |
| Unemployment Rate 2011 | | | | 14.6% | | 10.6% | 31 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 798 | | | 98 | | | \$44,497.6 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 1.9% | 82.4% | 0.0% | 15.4% | 0.0% | 0.3% |

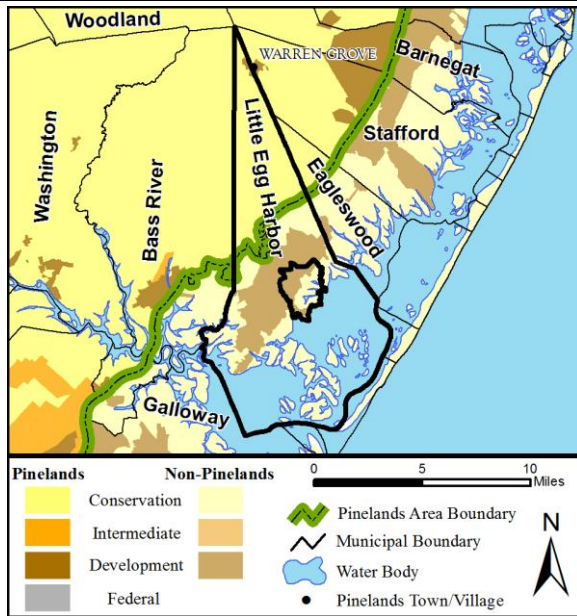
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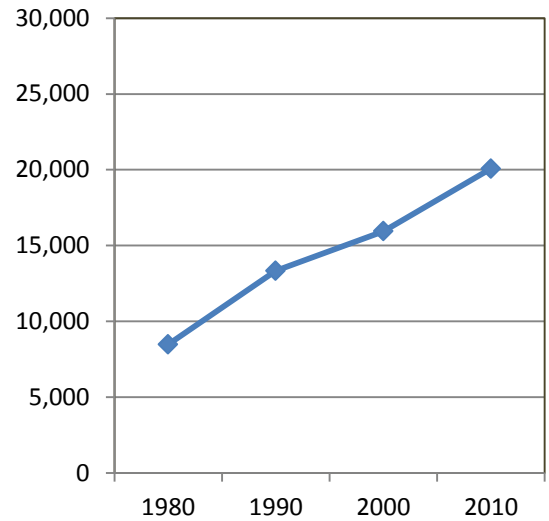
Little Egg Harbor Township, Ocean County

2010 Census:

| | | |
|--|-----|--------------------------------|
| % of population in Pinelands Area | 1% | (203 Residents / 20,010 total) |
| % of housing units in the Pinelands Area | 1% | (67 units / 10,314 total) |
| % of land in the Pinelands Area | 25% | (11,581 acres / 47,016 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| 86% | 13% | | | | | | 1% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 20,162 | 12,006 | 36 | | |
| Population Density 2011 (per mi ²) | | | | 272.5 | 1,806.5 | 154 | | |
| Population Change 2000 - 2010 | | | | 25.8% | 4.5% | 18 | | |
| Land Area (mi ²) | | | | 74.0 | 19.3 | 12 | | |
| % Land Permanently Protected in Pinelands Area | | | | 86.9% | *33.7% | *2 | | |
| Assessed Acres of Farmland 2010 | | | | *131 | N/A | N/A | | |
| Building Permits 2011 | | | | 76 | 19.7 | 15 | | |
| Residential Housing Transactions 2011 | | | | 132 | 59 | 26 | | |
| Average Sale Price of Homes 2011 | | | | \$212,624 | \$291,382 | 108 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$2,755.3 | \$1,642 | 36 | | |
| Effective Tax Rate 2011 | | | | 1.80 | 2.25 | 150 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,425 | \$5,503 | 146 | | |
| Per Capita Income 2010 | | | | \$28,566 | \$32,312 | 118 | | |
| Unemployment Rate 2011 | | | | 11.7% | 10.6% | 66 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 1,540 | | | 223 | | \$27,300.0 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 4.2% | 90.5% | 0.0% | 5.1% | 0.0% | 0.1% |

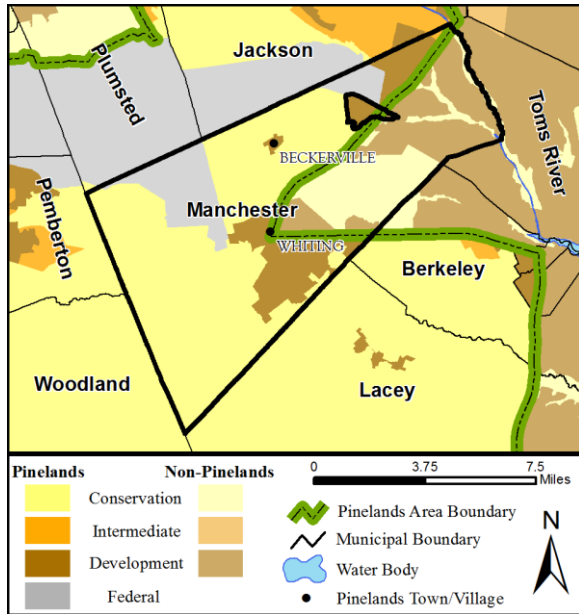
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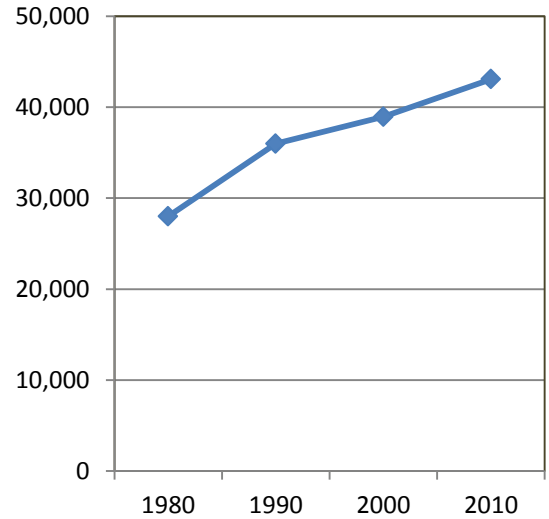
Manchester Township, Ocean County

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 28% | (12,286 Residents / 43,171 total) |
| % of housing units in the Pinelands Area | 32% | (8,220 units / 25,955 total) |
| % of land in the Pinelands Area | 73% | (38,728 acres / 52,982 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|------------------------------------|---------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|------------|
| 46% | 25% | | | < 1% | 4% | 11% | <1% | 13% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 43,278 | 12,006 | 12 | | | |
| Population Density 2011 (per mi ²) | | | | 525.2 | 1,806.5 | 130 | | | |
| Population Change 2000 - 2010 | | | | 10.6% | 4.5% | 49 | | | |
| Land Area (mi ²) | | | | 82.4 | 19.3 | 9 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 51.1% | *33.7% | *14 | | | |
| Assessed Acres of Farmland 2010 | | | | *2,665 | N/A | N/A | | | |
| Building Permits 2011 | | | | 1 | 19.7 | 143 | | | |
| Residential Housing Transactions 2011 | | | | 181 | 59 | 17 | | | |
| Average Sale Price of Homes 2011 | | | | \$201,694 | \$291,382 | 120 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$4,060.3 | \$1,642 | 22 | | | |
| Effective Tax Rate 2011 | | | | 1.87 | 2.25 | 142 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,624 | \$5,503 | 185 | | | |
| Per Capita Income 2010 | | | | \$27,264 | \$32,312 | 137 | | | |
| Unemployment Rate 2011 | | | | 14.2% | 10.6% | 35 | | | |
| Private Sector Employment 2010 | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | | |
| 3,771 | | 295 | | | \$30,483.8 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 4.5% | 75.3% | 0.0% | 8.8% | 0.7% | 10.7% |

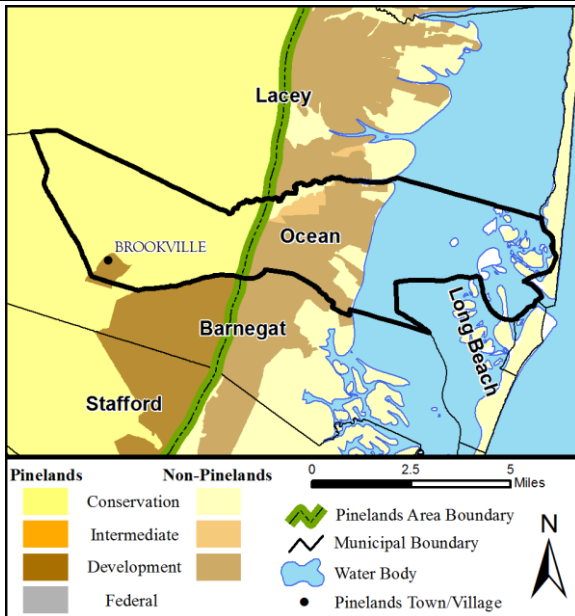
N/A – Due to limited data available

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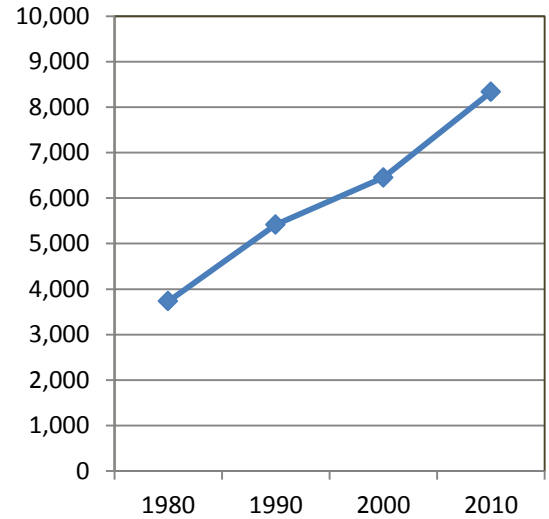
Ocean Township, Ocean County

2010 Census:

| | | |
|--|-----|-------------------------------|
| % of population in Pinelands Area | 2% | (140 Residents / 8,354 total) |
| % of housing units in the Pinelands Area | 1% | (52 units / 4,308 total) |
| % of land in the Pinelands Area | 41% | (8,233 acres / 20,252 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | 96% | | | | | | 4% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 8,372 | 12,006 | 81 | | |
| Population Density 2011 (per mi ²) | | | | 264.9 | 1,806.5 | 156 | | |
| Population Change 2000 - 2010 | | | | 29.2% | 4.5% | 16 | | |
| Land Area (mi ²) | | | | 31.6 | 19.3 | 46 | | |
| % Land Permanently Protected in Pinelands Area | | | | 47.9% | *33.7% | *19 | | |
| Assessed Acres of Farmland 2010 | | | | *752 | N/A | N/A | | |
| Building Permits 2011 | | | | 37 | 19.7 | 34 | | |
| Residential Housing Transactions 2011 | | | | 58 | 59 | 59 | | |
| Average Sale Price of Homes 2011 | | | | \$303,473 | \$291,382 | 44 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$1,400.8 | \$1,642 | 66 | | |
| Effective Tax Rate 2011 | | | | 1.51 | 2.25 | 164 | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,561 | \$5,503 | 136 | | |
| Per Capita Income 2010 | | | | \$36,895 | \$32,312 | 40 | | |
| Unemployment Rate 2011 | | | | 13.1% | 10.6% | 47 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 849 | | | 118 | | \$25,931.0 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 5.0% | 90.4% | 0.0% | 4.6% | 0.0% | 0.0% |

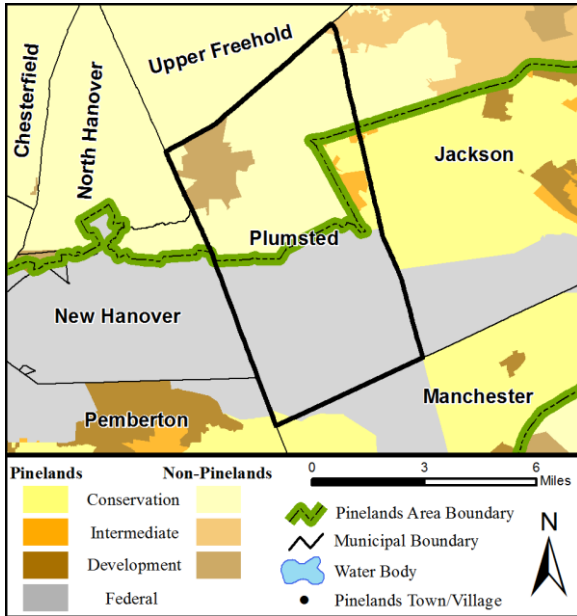
N/A – Due to limited data available

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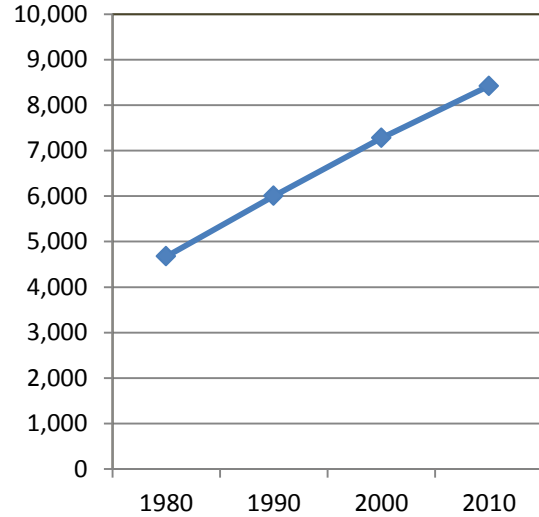
Plumsted Township, Ocean County

2010 Census:

| | | |
|--|-----|-------------------------------|
| % of population in Pinelands Area | 5% | (451 Residents / 8,421 total) |
| % of housing units in the Pinelands Area | 6% | (171 units / 3,067 total) |
| % of land in the Pinelands Area | 53% | (13,423 acres / 25,289 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| 2% | 5% | | | 5% | | | | 88% | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 8,463 | 12,006 | 78 | | | |
| Population Density 2011 (per mi ²) | | | | 214.3 | 1,806.5 | 166 | | | |
| Population Change 2000 - 2010 | | | | 15.8% | 4.5% | 35 | | | |
| Land Area (mi ²) | | | | 39.5 | 19.3 | 38 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 5.7% | *33.7% | *39 | | | |
| Assessed Acres of Farmland 2010 | | | | *2,653 | N/A | N/A | | | |
| Building Permits 2011 | | | | 14 | 19.7 | 60 | | | |
| Residential Housing Transactions 2011 | | | | 22 | 59 | 106 | | | |
| Average Sale Price of Homes 2011 | | | | \$296,541 | \$291,382 | 50 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$911.7 | \$1,642 | 91 | | | |
| Effective Tax Rate 2011 | | | | 1.72 | 2.25 | 156 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,585 | \$5,503 | 81 | | | |
| Per Capita Income 2010 | | | | \$31,719 | \$32,312 | 81 | | | |
| Unemployment Rate 2011 | | | | 7.0% | 10.6% | 176 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 665 | | | 137 | | | \$28,296.0 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.5% | 90.3% | 0.2% | 5.3% | 1.3% | 0.4% |

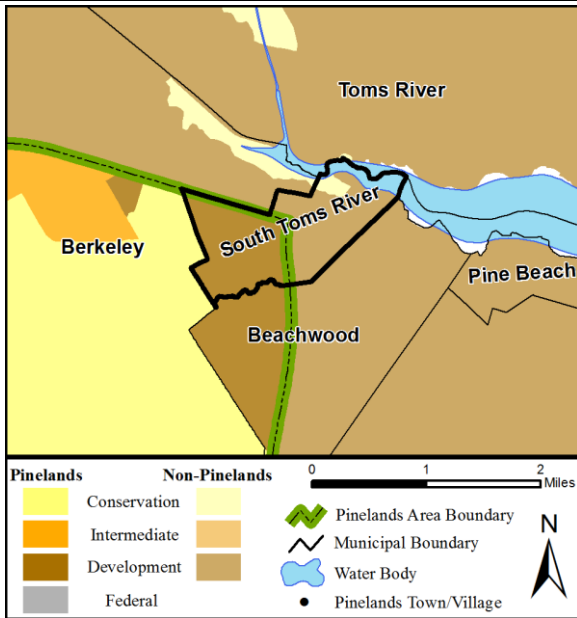
N/A – Due to limited data available

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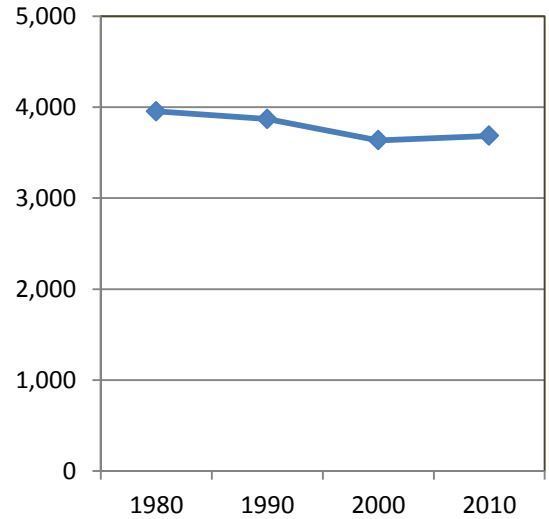
South Toms River Borough, Ocean County

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 70% | (2,586 Residents / 3,684 total) |
| % of housing units in the Pinelands Area | 69% | (797 units / 1,160 total) |
| % of land in the Pinelands Area | 47% | (376 acres / 798 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|------------------------------|---------------------------------------|-------------------|--------------------|------------|
| | | | | | 100% | | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 3,701 | 12,006 | 130 | | | |
| Population Density 2011 (per mi ²) | | | | 3,084.2 | 1,806.5 | 43 | | | |
| Population Change 2000 - 2010 | | | | 1.4% | 4.5% | 100 | | | |
| Land Area (mi ²) | | | | 1.2 | 19.3 | 167 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | | |
| Assessed Acres of Farmland 2010 | | | | *0 | N/A | N/A | | | |
| Building Permits 2011 | | | | 1 | 19.7 | 143 | | | |
| Residential Housing Transactions 2011 | | | | 6 | 59 | 163 | | | |
| Average Sale Price of Homes 2011 | | | | \$190,383 | \$291,382 | 131 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$261.9 | \$1,642 | 155 | | | |
| Effective Tax Rate 2011 | | | | 2.11 | 2.25 | 120 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,211 | \$5,503 | 157 | | | |
| Per Capita Income 2010 | | | | \$19,177 | \$32,312 | 190 | | | |
| Unemployment Rate 2011 | | | | 16.8% | 10.6% | 16 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 379 | | | 58 | | | \$36,276.8 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.0% | 83.9% | 0.0% | 14.0% | 0.1% | 0.0% |

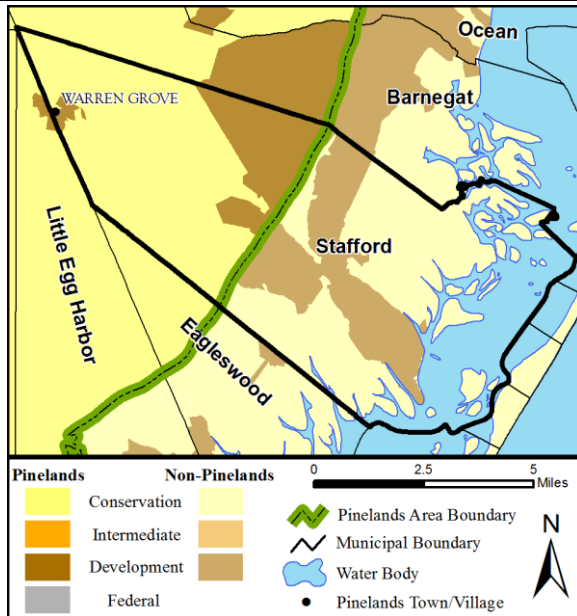
N/A – Due to limited data available

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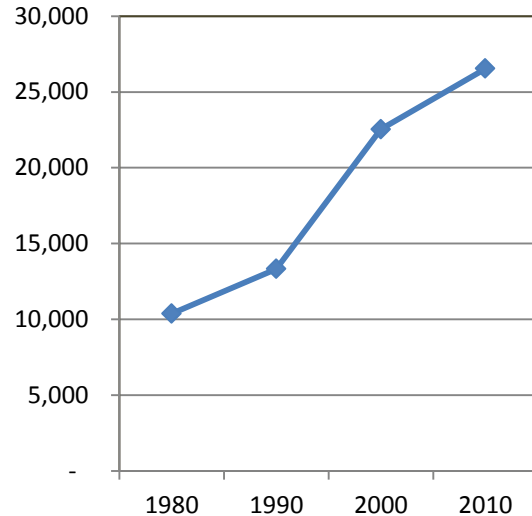
Stafford Township, Ocean County

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 59% | (15,857 Residents / 26,714 total) |
| % of housing units in the Pinelands Area | 43% | (5,855 units / 13,664 total) |
| % of land in the Pinelands Area | 39% | (13,709 acres / 34,962 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|--|
| 5% | 71% | | | | 22% | | 1% | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | | |
| Population Estimate 2011 | | | | 26,665 | 12,006 | 26 | | | |
| Population Density 2011 (per mi ²) | | | | 487.5 | 1,806.5 | 134 | | | |
| Population Change 2000 - 2010 | | | | 17.8% | 4.5% | 31 | | | |
| Land Area (mi ²) | | | | 54.7 | 19.3 | 21 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 69.6% | *33.7% | *8 | | | |
| Assessed Acres of Farmland 2010 | | | | *176 | N/A | N/A | | | |
| Building Permits 2011 | | | | 168 | 19.7 | 2 | | | |
| Residential Housing Transactions 2011 | | | | 217 | 59 | 14 | | | |
| Average Sale Price of Homes 2011 | | | | \$301,639 | \$291,382 | 47 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$4,564.0 | \$1,642 | 14 | | | |
| Effective Tax Rate 2011 | | | | 1.81 | 2.25 | 149 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,677 | \$5,503 | 78 | | | |
| Per Capita Income 2010 | | | | \$31,690 | \$32,312 | 82 | | | |
| Unemployment Rate 2011 | | | | 9.4% | 10.6% | 116 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | | |
| 7,230 | | | 656 | | \$32,410.4 | | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments | |
| | | | 2.8% | 86.6% | 0.0% | 10.4% | 0.0% | 0.1% | |

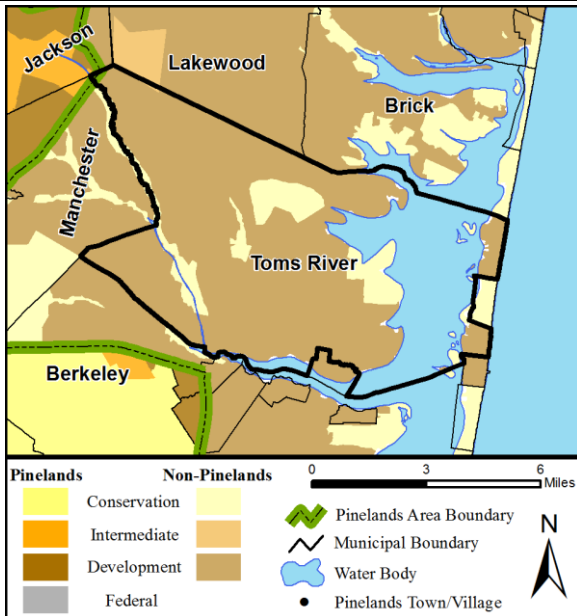
N/A – Due to limited data available

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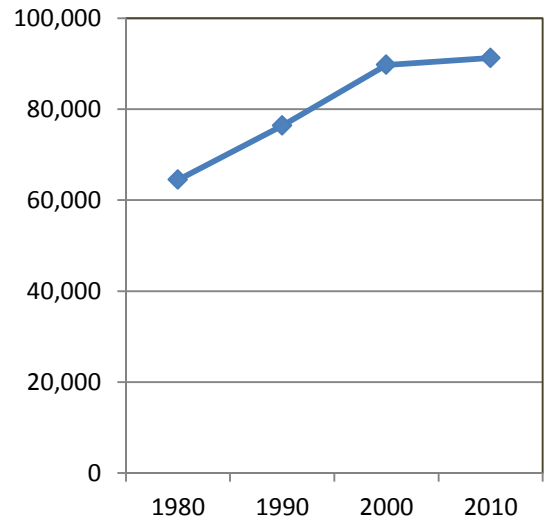
Toms River, Ocean County

2010 Census:

| | | |
|--|-------|------------------------------|
| % of population in Pinelands Area | 0% | (0 Residents / 91,784 total) |
| % of housing units in the Pinelands Area | 0% | (0 units / 44,033 total) |
| % of land in the Pinelands Area | 0.04% | (13 acres / 34,120 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|---------------------------|-------------------|--------------------|
| | | | | | 100% | | | |
| | | | | Municipal Value | South N.J. Municipal Average | South N.J. Municipal Rank | | |
| Population Estimate 2011 | | | | 91,680 | 12,006 | 2 | | |
| Population Density 2011 (per mi ²) | | | | 1,739.7 | 1,806.5 | 81 | | |
| Population Change 2000 - 2010 | | | | 1.7% | 4.5% | 95 | | |
| Land Area (mi ²) | | | | 52.7 | 19.3 | 24 | | |
| % Land Permanently Protected in Pinelands Area | | | | 0.0% | *33.7% | *44 | | |
| Assessed Acres of Farmland 2010 | | | | *0 | N/A | N/A | | |
| Building Permits 2011 | | | | 103 | 19.7 | 8 | | |
| Residential Housing Transactions 2011 | | | | 523 | 59 | 1 | | |
| Average Sale Price of Homes 2011 | | | | \$370,711 | \$291,382 | 29 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$16,559.2 | \$1,642 | 2 | | |
| Effective Tax Rate 2011 | | | | 1.49 | 2.25 | 166 | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,345 | \$5,503 | 89 | | |
| Per Capita Income 2010 | | | | \$33,423 | \$32,312 | 68 | | |
| Unemployment Rate 2011 | | | | 9.9% | 10.6% | 105 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 31,475 | | | 2,872 | | \$38,423.7 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 1.7% | 82.8% | 0.0% | 13.7% | 0.5% | 1.4% |

N/A – Due to limited data available

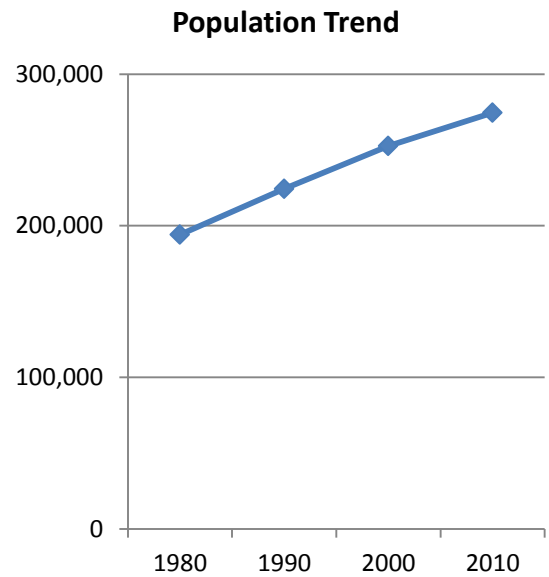
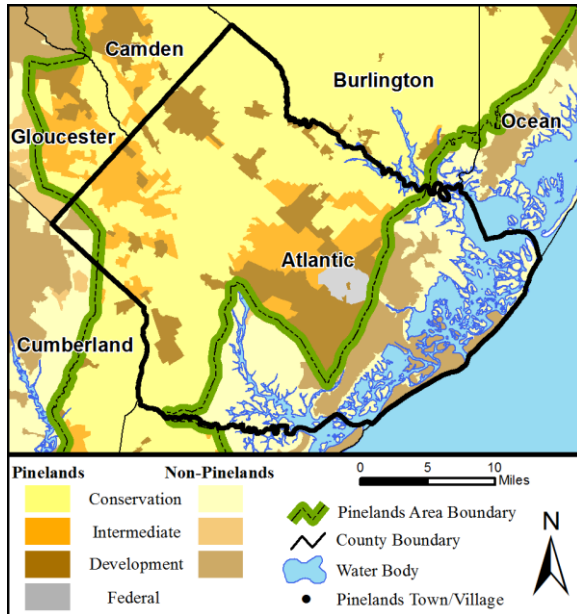
*This figure captures the 53 Pinelands Area municipalities only, not southern New Jersey

Atlantic County

% of Municipalities in Pinelands: 57% (13 / 23 total)

2010 Census:

| | | |
|--|-----|-------------------------------------|
| % of population in Pinelands Area | 38% | (105,564 Residents / 274,443 total) |
| % of housing units in the Pinelands Area | 31% | (38,805 units/ 126,582 total) |
| % of land in the Pinelands Area | 63% | (247,877 acres / 391,134 total) |



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|------------------------|-------------------|--------------------|
| 8% | 41% | 10% | < 1% | 17% | 11% | 5% | 5% | 2% |
| | | | | County Value | South N.J. County Average | South N.J. County Rank | | |
| Population Estimate 2011 | | | | 274,338 | 303,153 | 5 | | |
| Population Density 2011 (per mi ²) | | | | 449 | 715 | 5 | | |
| Population Change 2000 - 2010 | | | | 8.7% | 5.8% | 3 | | |
| Land Area (mi ²) | | | | 611 | 486 | 3 | | |
| % Land Permanently Protected in Pinelands Area | | | | 27.6% | *39.3% | *6 | | |
| Assessed Acres of Farmland 2010 | | | | *32,501 | N/A | N/A | | |
| Building Permits 2011 | | | | 386 | 496.5 | 6 | | |
| Residential Housing Transactions 2011 | | | | 1,417 | 1,495 | 5 | | |
| Average Sale Price of Homes 2011 | | | | \$299,324 | \$289,619 | 3 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$50,148.8 | \$41,453 | 2 | | |
| Effective Tax Rate 2011 | | | | 2.03 | 2.20 | 6 | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,282 | \$5,219 | 5 | | |
| Per Capita Income 2010 | | | | \$27,247 | \$29,414 | 7 | | |
| Unemployment Rate 2011 | | | | 12.9% | 11.1% | 2 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 111,749 | | | 6,624 | | \$36,478 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 4.3% | 56.0% | 0% | 37.9% | 0.5% | 1.2% |

N/A – Due to limited data available

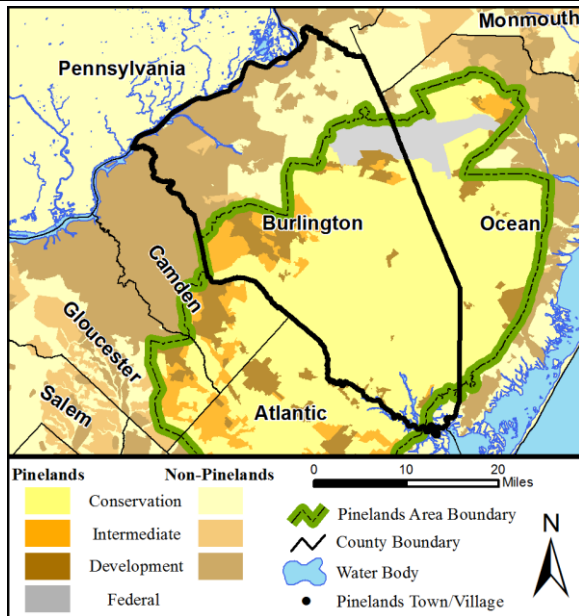
*This figure captures the 7 Pinelands Area counties only, not southern New Jersey

Burlington County

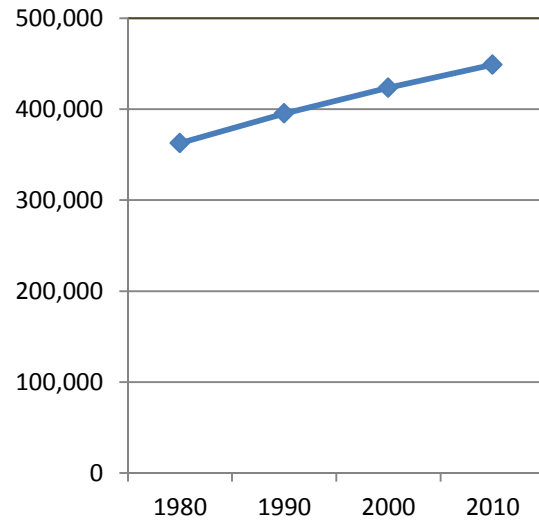
% of Municipalities in Pinelands: 35% (14 / 40 total)

2010 Census:

| | | |
|--|-----|------------------------------------|
| % of population in Pinelands Area | 21% | (96,358 Residents / 448,848 total) |
| % of housing units in the Pinelands Area | 20% | (35,141 units / 175,686 total) |
| % of land in the Pinelands Area | 64% | (334,224 acres / 524,205 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------|---------------------------------------|-------------------|--------------------|------------|
| 54% | 4% | 8% | 11% | 9% | 7% | < 1% | 1% | 6% | |
| | | | | County Value | South N.J. County Average | South N.J. County Rank | | | |
| Population Estimate 2011 | | | | 449,576 | 303,153 | 3 | | | |
| Population Density 2011 (per mi ²) | | | | 549 | 715 | 4 | | | |
| Population Change 2000 - 2010 | | | | 6.0% | 5.8% | 5 | | | |
| Land Area (mi ²) | | | | 819 | 486 | 1 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 55.4% | *39.3% | *2 | | | |
| Assessed Acres of Farmland 2010 | | | | *64,284 | N/A | N/A | | | |
| Building Permits 2011 | | | | 780 | 496.5 | 2 | | | |
| Residential Housing Transactions 2011 | | | | 2,038 | 1,495 | 2 | | | |
| Average Sale Price of Homes 2011 | | | | \$251,077 | \$289,619 | 4 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$48,387.7 | \$41,453 | 4 | | | |
| Effective Tax Rate 2011 | | | | 2.27 | 2.20 | 5 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,756 | \$5,219 | 4 | | | |
| Per Capita Income 2010 | | | | \$34,802 | \$29,414 | 1 | | | |
| Unemployment Rate 2011 | | | | 8.9% | 11.1% | 8 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 161,307 | | | 10,817 | | | \$41,575 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 1.4% | 79.3% | 0.1% | 12.7% | 3.7% | 2.8% |

N/A – Due to limited data available

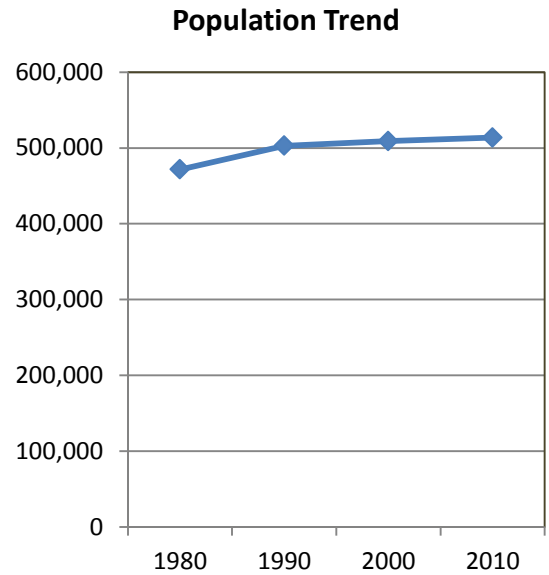
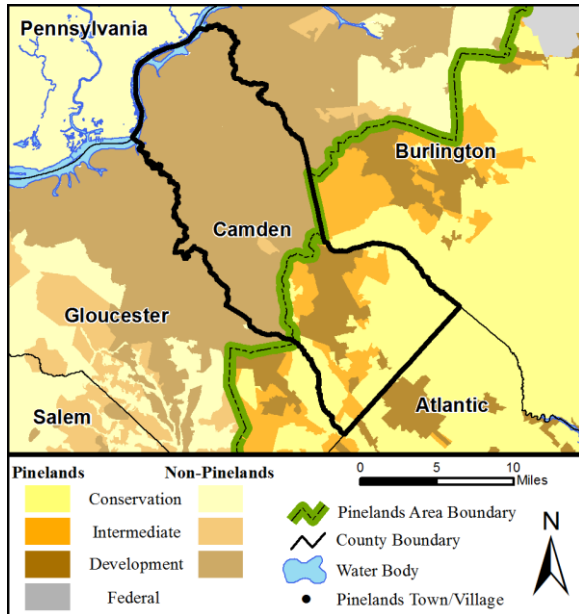
*This figure captures the 7 Pinelands Area counties only, not southern New Jersey

Camden County

% of Municipalities in Pinelands: 13% (5 / 39 total)

2010 Census:

| | | |
|--|-----|------------------------------------|
| % of population in Pinelands Area | 6% | (30,475 Residents / 513,778 total) |
| % of housing units in the Pinelands Area | 5% | (11,032 units/ 204,927 total) |
| % of land in the Pinelands Area | 38% | (54,907 acres / 145,592 total) |



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|------------------------|-------------------|--------------------|
| 27% | 12% | 17% | < 1% | 21% | 19% | | 4% | |
| | | | | County Value | South N.J. County Average | South N.J. County Rank | | |
| Population Estimate 2011 | | | | 513,241 | 303,153 | 2 | | |
| Population Density 2011 (per mi ²) | | | | 2,256 | 715 | 1 | | |
| Population Change 2000 - 2010 | | | | 0.9% | 5.8% | 7 | | |
| Land Area (mi ²) | | | | 228 | 486 | 8 | | |
| % Land Permanently Protected in Pinelands Area | | | | 42.8% | *39.3% | *5 | | |
| Assessed Acres of Farmland 2010 | | | | *8,204 | N/A | N/A | | |
| Building Permits 2011 | | | | 566 | 496.5 | 4 | | |
| Residential Housing Transactions 2011 | | | | 1,893 | 1,495 | 3 | | |
| Average Sale Price of Homes 2011 | | | | \$188,340 | \$289,619 | 7 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$39,731.9 | \$41,453 | 5 | | |
| Effective Tax Rate 2011 | | | | 3.06 | 2.20 | 1 | | |
| Average Residential Property Tax Bill 2011 | | | | \$6,220 | \$5,219 | 1 | | |
| Per Capita Income 2010 | | | | \$29,478 | \$29,414 | 5 | | |
| Unemployment Rate 2011 | | | | 10.6% | 11.1% | 5 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 157,774 | | | 12,316 | | \$37,018 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 1.4% | 78.5% | 0.0% | 14.4% | 2.2% | 3.5% |

N/A – Due to limited data available

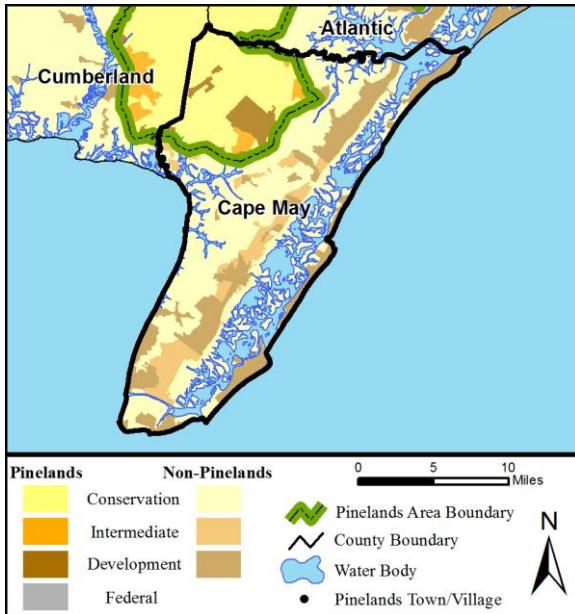
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Cape May County

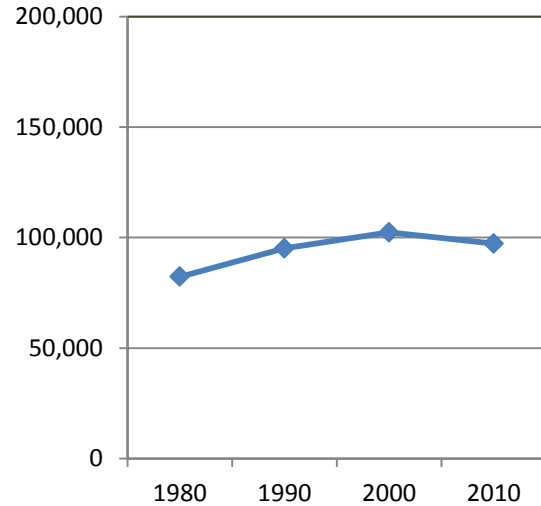
% of Municipalities in Pinelands: 19% (3 / 16 total)

2010 Census:

| | | |
|--|-----|----------------------------------|
| % of population in Pinelands Area | 5% | (5,341 Residents / 97,257 total) |
| % of housing units in the Pinelands Area | 2% | (2,157 units/ 98,301 total) |
| % of land in the Pinelands Area | 19% | (34,807 acres / 182,632 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------|---------------------------------------|-------------------|--------------------|------------|
| | 76% | | | 6% | | 12% | 6% | | |
| | | | | County Value | South N.J. County Average | South N.J. County Rank | | | |
| Population Estimate 2011 | | | | 96,601 | 303,153 | 7 | | | |
| Population Density 2011 (per mi ²) | | | | 338 | 715 | 6 | | | |
| Population Change 2000 - 2010 | | | | -4.9% | 5.8% | 8 | | | |
| Land Area (mi ²) | | | | 285 | 486 | 7 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 51.7% | *39.3% | *4 | | | |
| Assessed Acres of Farmland 2010 | | | | *2,462 | N/A | N/A | | | |
| Building Permits 2011 | | | | 456 | 496.5 | 5 | | | |
| Residential Housing Transactions 2011 | | | | 1,450 | 1,495 | 4 | | | |
| Average Sale Price of Homes 2011 | | | | \$538,919 | \$289,619 | 1 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$49,953.1 | \$41,453 | 3 | | | |
| Effective Tax Rate 2011 | | | | 1.04 | 2.20 | 8 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$4,250 | \$5,219 | 7 | | | |
| Per Capita Income 2010 | | | | \$33,571 | \$29,414 | 2 | | | |
| Unemployment Rate 2011 | | | | 12.5% | 11.1% | 3 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 31,120 | | | 3,877 | | | \$28,166 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.3% | 89.4% | 0.0% | 7.4% | 0.1% | 0.9% |

N/A – Due to limited data available

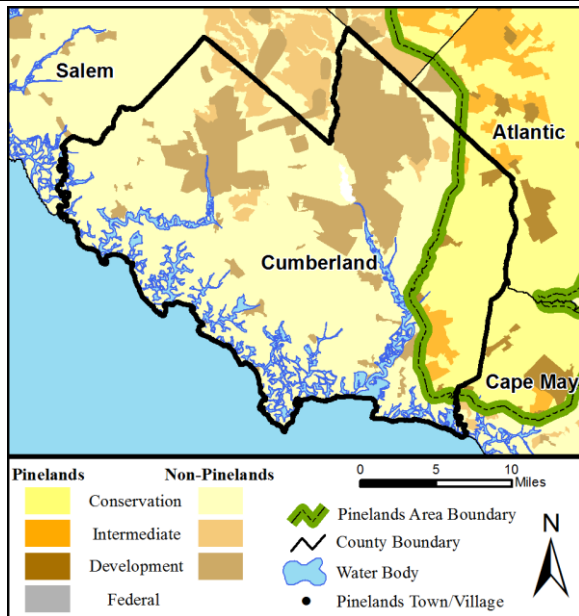
*This figure captures the 7 Pinelands Area counties only, not southern New Jersey

Cumberland County

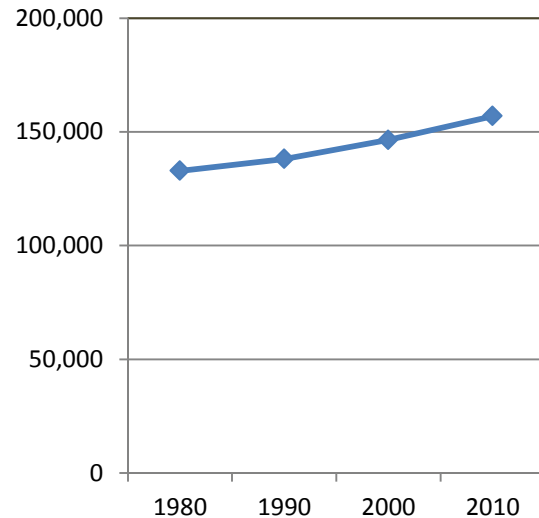
% of Municipalities in Pinelands: 14% (2 / 14 total)

2010 Census:

| | | |
|--|-----|-----------------------------------|
| % of population in Pinelands Area | 4% | (6,053 Residents / 156,859 total) |
| % of housing units in the Pinelands Area | 1% | (653 units/ 55,771 total) |
| % of land in the Pinelands Area | 14% | (45,398 acres / 321,645 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------|---------------------------------------|-------------------|--------------------|------------|
| | 82% | 1% | | 11% | | | 6% | | |
| | | | | County Value | South N.J. County Average | South N.J. County Rank | | | |
| Population Estimate 2011 | | | | 157,095 | 303,153 | 6 | | | |
| Population Density 2011 (per mi ²) | | | | 313 | 715 | 7 | | | |
| Population Change 2000 - 2010 | | | | 7.1% | 5.8% | 4 | | | |
| Land Area (mi ²) | | | | 503 | 486 | 4 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 52.2% | *39.3% | *3 | | | |
| Assessed Acres of Farmland 2010 | | | | *7,182 | N/A | N/A | | | |
| Building Permits 2011 | | | | 181 | 496.5 | 7 | | | |
| Residential Housing Transactions 2011 | | | | 425 | 1,495 | 7 | | | |
| Average Sale Price of Homes 2011 | | | | \$155,711 | \$289,619 | 8 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$9,175.4 | \$41,453 | 7 | | | |
| Effective Tax Rate 2011 | | | | 2.47 | 2.20 | 4 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$3,825 | \$5,219 | 8 | | | |
| Per Capita Income 2010 | | | | \$21,883 | \$29,414 | 8 | | | |
| Unemployment Rate 2011 | | | | 13.4% | 11.1% | 1 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 44,302 | | | 3,178 | | | \$34,352 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.8% | 76.4% | 0.6% | 13.6% | 4.9% | 1.6% |

N/A – Due to limited data available

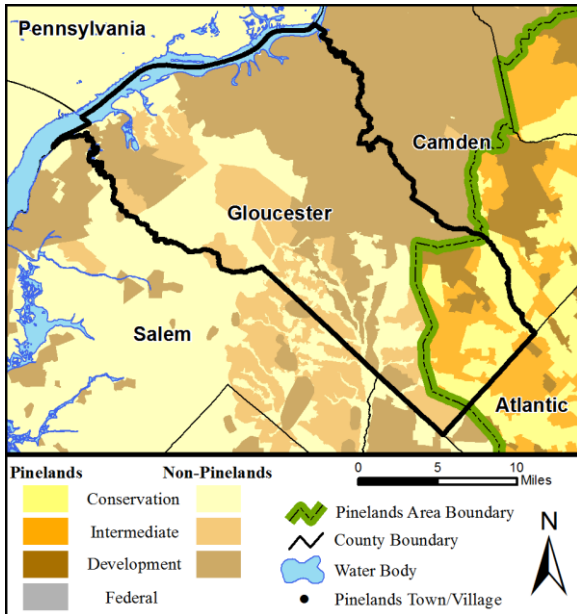
*This figure captures the 7 Pinelands Area counties only, not southern New Jersey

Gloucester County

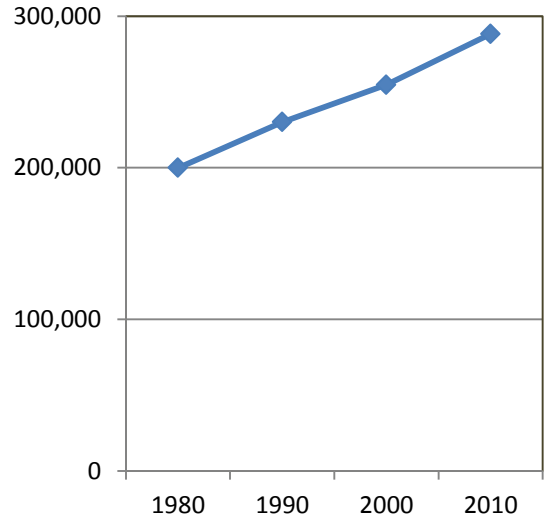
% of Municipalities in Pinelands: 8% (2 / 24 total)

2010 Census:

| | | |
|--|-----|------------------------------------|
| % of population in Pinelands Area | 7% | (20,487 Residents / 288,147 total) |
| % of housing units in the Pinelands Area | 7% | (7,532 units/ 109,806 total) |
| % of land in the Pinelands Area | 16% | (33,581 acres / 215,617 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal | |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------|---------------------------------------|-------------------|--------------------|------------|
| | 22% | 22% | | 38% | 17% | | < 1% | | |
| | | | | County Value | South N.J. County Average | South N.J. County Rank | | | |
| Population Estimate 2011 | | | | 289,104 | 303,153 | 4 | | | |
| Population Density 2011 (per mi ²) | | | | 858 | 715 | 2 | | | |
| Population Change 2000 - 2010 | | | | 13.2% | 5.8% | 1 | | | |
| Land Area (mi ²) | | | | 337 | 486 | 6 | | | |
| % Land Permanently Protected in Pinelands Area | | | | 26.6% | *39.3% | *7 | | | |
| Assessed Acres of Farmland 2010 | | | | *8,504 | N/A | N/A | | | |
| Building Permits 2011 | | | | 591 | 496.5 | 3 | | | |
| Residential Housing Transactions 2011 | | | | 1,238 | 1,495 | 6 | | | |
| Average Sale Price of Homes 2011 | | | | \$211,669 | \$289,619 | 5 | | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$27,817.5 | \$41,453 | 6 | | | |
| Effective Tax Rate 2011 | | | | 2.77 | 2.20 | 2 | | | |
| Average Residential Property Tax Bill 2011 | | | | \$5,928 | \$5,219 | 3 | | | |
| Per Capita Income 2010 | | | | \$31,210 | \$29,414 | 3 | | | |
| Unemployment Rate 2011 | | | | 9.8% | 11.1% | 7 | | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | | Private Sector Avg. Annual Wages 2010 | | | |
| 78,750 | | | 6,006 | | | \$38,448 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | | 2.2% | 75.4% | 0.2% | 13.7% | 6.9% | 1.8% |

N/A – Due to limited data available

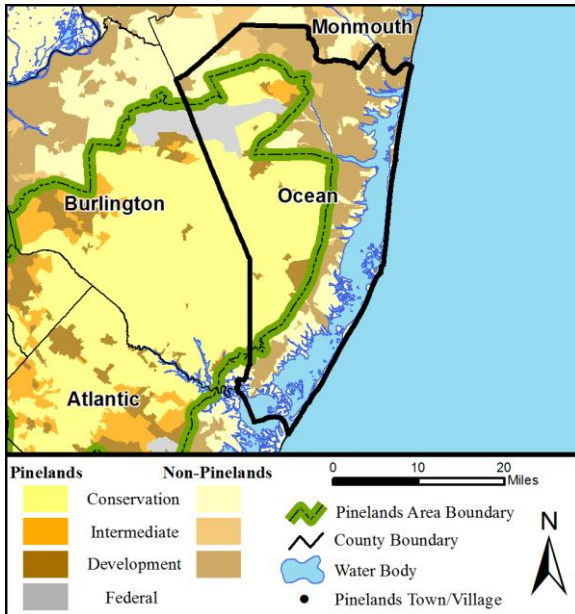
*This figure captures the 7 Pinelands Area counties only, not southern New Jersey

Ocean County

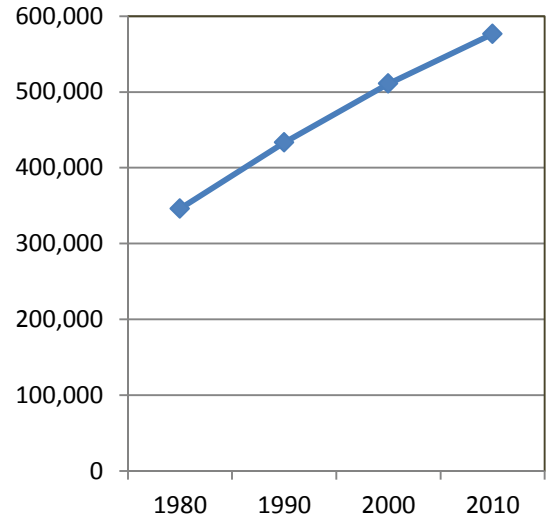
% of Municipalities in Pinelands: 39% (13 / 33 total)

2010 Census:

| | | |
|--|-----|---------------------------------|
| % of population in Pinelands Area | 8% | (48,562 Residents / 575,943) |
| % of housing units in the Pinelands Area | 8% | (23,268 units/ 277,796 total) |
| % of land in the Pinelands Area | 39% | (187,559 acres / 485,569 total) |



Population Trend



| Preservation | Forest | Agricultural Production | Special Agricultural Production | Rural Development | Regional Growth | Pinelands Town | Pinelands Village | Military & Federal |
|---|--------|-------------------------|------------------------------------|-------------------|---------------------------------------|------------------------|-------------------|--------------------|
| 41% | 33% | < 1% | | 3% | 6% | 3% | 1% | 12% |
| | | | | County Value | South N.J. County Average | South N.J. County Rank | | |
| Population Estimate 2011 | | | | 579,369 | 303,153 | 1 | | |
| Population Density 2011 (per mi ²) | | | | 764 | 715 | 3 | | |
| Population Change 2000 - 2010 | | | | 12.8% | 5.8% | 2 | | |
| Land Area (mi ²) | | | | 759 | 486 | 2 | | |
| % Land Permanently Protected in Pinelands Area | | | | 58.4% | *39.3% | *1 | | |
| Assessed Acres of Farmland 2010 | | | | *12,777 | N/A | N/A | | |
| Building Permits 2011 | | | | 930 | 496.5 | 1 | | |
| Residential Housing Transactions 2011 | | | | 3,312 | 1,495 | 1 | | |
| Average Sale Price of Homes 2011 | | | | \$482,918 | \$289,619 | 2 | | |
| Equalized Value of Property 2011 (Millions \$) | | | | \$100,911.7 | \$41,453 | 1 | | |
| Effective Tax Rate 2011 | | | | 1.46 | 2.20 | 7 | | |
| Average Residential Property Tax Bill 2011 | | | | \$6,032 | \$5,219 | 2 | | |
| Per Capita Income 2010 | | | | \$29,826 | \$29,414 | 4 | | |
| Unemployment Rate 2011 | | | | 10.0% | 11.1% | 6 | | |
| Private Sector Employment 2010 | | | Private Sector Establishments 2010 | | Private Sector Avg. Annual Wages 2010 | | | |
| 119,451 | | | 12,000 | | \$31,298 | | | |
| Assessment Class Proportions in Municipal Valuations 2011 | | | Vacant | Residential | Agricultural | Commercial | Industrial | Apartments |
| | | | 2.7% | 86.2% | 0.0% | 8.6% | 1.0% | 1.5% |

N/A – Due to limited data available

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