

Maryland's Timbersheds

Maryland Forest Service · Maryland Department of Natural Resources

Maryland's forest products industry operates across four distinct timbersheds, each with different forest types, ownership patterns, mill capacity, and market conditions. This reference summarizes key statistics and conditions by region. Industry data reflects 2020 firm and employment data; timber resource data from USDA Forest Service Forest Inventory and Analysis (FIA), 2018. Economic output figures reflect 2016 IMPLAN analysis.

	Western MD	Eastern Shore	Central MD	Southern MD	Statewide
Industry Overview					
Firms	101	128	775	61	1,065+
Employees	1,317	822	6,727	279	~13,000
Revenue	\$303.6M	\$112.4M	\$1.77B	\$31.6M	\$3.86B total output
Timberland (acres)	570,759	729,135	550,194	303,678	~2.15M managed
Private Forest Owners	3,167	4,786	5,722	1,158	31,274 statewide
Timber Resource					
Growing Stock Volume	1.12 BCF	1.89 BCF	1.75 BCF	914 MMCF	~6.5 BCF
Dominant Type	Hardwood (89%)	Softwood (35%) /Hardwood (65%)	Hardwood (97%)	Hardwood (89%)	Hardwood dominant
Top Species	White oak,red oak,maple,yellow poplar,black cherry	Loblolly pine,soft maple,sweetgum,red oak	Yellow poplar,red oak,white oak,soft maple	Yellow poplar,white oak,sweetgum,loblolly pine	Yellow poplar,red oak,loblolly pine
Volume Trend (1986–2018)	↑ 23%(trees getting larger)	↑ 35% <small>sawtimber(trees 15"+</small> ↑ 72%)	↑ 31% <small>despite 17%timberland loss</small>	↑ 11% <small>(declining since 1999)</small>	Growth exceeds removals by 25%+
Growth-Removal Ratio	11.58:1 (2018)	6.74:1 (2018)	11.95:1 (2018)	1.98:1 (2018)	>1.0 all regions
Primary Products and Markets					
Key Wood Products	Sawtimber, veneer, furniture-grade hardwood, pulpwood	Pine sawtimber ,pulpwood, animal bedding, wood pellets, wood chips	Flooring, millwork, furniture, urban lumber, wood chips	Niche hardwood lumber, veneer, fencing, finish lumber, log exports	Sawtimber, pulpwood, furniture, millwork, biomass
Key Markets	Furniture, cabinetry, flooring; out-of-state mills	Pulpwood, animal bedding,energy; limited local sawtimber market	Urban wood recovery,secondary manufacturing, Port of Baltimore	Direct sale, niche products, Virginia and Pennsylvania mills	Regional and national; some export through Port of Baltimore

Emerging Opportunities	Mass timber(yellow poplar),wood pellets,biomass energy,advanced materials	New primary milling capacity,logistics solutions,Baltimore marketlinkage	Urban wood aggregation,thermally modified wood, cooperage,mass timber	Mass timber,hardwood CLT,yellow poplar branding,community biomass energy	Mass timber,wood energy,urban wood utilization,export markets
Industry Conditions					
Primary Challenge	Loss of Verso Luke Mill; loggers exporting raw material out of state	Mill capacity loss since 1983; trees maturing faster than markets can absorb	Urban fragmentation; low harvest rate; urban wood waste underutilized	Small mill scale; log exports before primary processing; limited market infrastructure	Mill contraction ;growing inventory; market access; workforce aging
Mill Capacity vs. Removals	2.2M vs. 5.1M cubic feet(2018)	Limited; two pine sawmills remaining	1.7M vs. 15.5M cubic feet(2018)	5.0M vs. 8.7M cubic feet(2018)	Growth exceeds harvest statewide; capacity declining
State Forest Contribution	Savage River, Green Ridge, Potomac-Garrett (123,247 ac.)	Chesapeake Forest, Pocomoke State Forest (96,498 ac.)	Limited state forest presence	Four small state forests (~6,376 ac.)	~220,000 acres total state forest; dual FSC/SFIcertified
Harvest Trend	Declining; 87% drop 2012–2018	Declining; 73% drop 2012–2018	Very low; <1% of growing stock harvested	Most active relative to inventory	Growth-to-removal ratio increasing across all regions
MFS Role and Resources					
State Forests	Savage River, Green Ridge, Potomac-Garrett	Chesapeake Forest, Pocomoke, Wicomico Demo, Seth Demo, Besley Demo	None	Cedarville, Doncaster Demo, St. Inigoes, Salem Demo	11 State Forests and Demo Forests
MFS BMP Oversight	Active harvest reviews	Active harvest reviews	Active harvest reviews	Active harvest reviews	13,000+ acresreviewed FY2025
Master Logger Required	Yes — all State Forest sales	Yes — all State Forest sales	Yes — all State Forest sales	Yes — all State Forest sales	Required on all State Forest timber sales

BCF billion cubic feet **CLT** cross-laminated timber **FIA** Forest Inventory and Analysis **FSC** Forest Stewardship Council **GRR** growth-to-removal ratio **MMCF** million cubic feet **SFI** Sustainable Forestry Initiative

Sources: USDA Forest Service FIA Program (2018); D&B Hoovers (2020); IMPLAN (2016); Maryland DNR Forest Service; USDA Forest Service State and Private Forestry Fact Sheet Maryland (2026).

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