

A 100-Year Comparison of Maryland's Forest Products Industry

Daniel Rider, Associate Director, Forest Products & Utilization

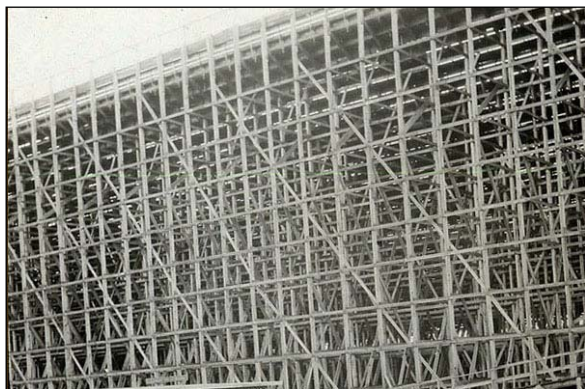
A full century of forestry in Maryland: by some measures, this is a long time -- by some other measures it's hardly a wink in time. Since folks involved with forest management are accustomed to thinking in terms of a forest life-cycle, the thought of a hundred-year period can pass through the mind's eye with little notice. Just take a moment to stop and think about what has occurred in the past hundred years: we have moved from horses to automobiles; cell phones replace the telegraph; schoolchildren use laptops and satellite links instead of chalkboards; people have left footprints in moon dust; and today horses are pets and oxen are curiosities. Thinking of these changes makes you wonder about what advancements have occurred in Maryland's forest industry.

Reflecting on our forest history holds more value than just an interesting reminiscence of days gone by – understanding our past reveals to us how market and social forces shaped our forests today and hints at what we could possibly expect from the future. Examining our forest history also affords us a benchmark from which we can compare our gains and advancements (or losses) during a hundred-year effort of conservation, management, and utilization.

Not surprisingly, many dramatic changes occurred in forest utilization during the last century. What is surprising, however, is what has remained the same. A quick examination of these changes and constants is enlightening.



Maryland wood-based manufacturers used over 345 million board feet of wood in 1916 (which does not include lumber, piling, ties, etc.), with a mere 17% of this wood used 54 species of wood, drawing from 34 states and 13 foreign countries. Nearly half (49%) of all wood consumed in Maryland was used by the box and crate industry. Planing mills, silo manufacturers and cooperages, ship building, railcar manufacture, furniture, caskets, luggage, baskets, toys, musical instruments and cigar box industries rounded out the bulk of the industry. Baltimore was by far and away the leading center of wood manufacturing with 164 plants employing over 8,000 persons. The other focal points for wood industry included Hagerstown (due to the exceptional railroad infrastructure) and Salisbury (having the advantage of combined access to rail and water transportation and proximity to great stands of timber). In short, Maryland at the time was known as an "industrial" State and forest products manufacture led the way.



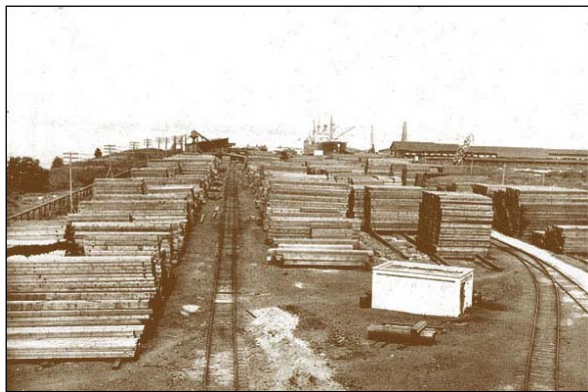
Wood manufacture was immensely important to the welfare of Maryland, which is why the public greatly supported programs aiming to increase the productivity of forestlands.

It's not too surprising to learn that in 1914 the 2.2 million acres of Maryland's forest supported 3.8 billion board feet of timber, which in turn fed a highly respected and valued industry of 800 sawmills, and 300+ wood-based manufacturers and ancillary businesses. Significant even by today's standards, 16,790 people relied on forest products for their wages, making it the second-largest single industry in

the State. Loggers produced 229 million board feet of logs, with hardwoods comprising 129 million board feet and pine accounting for the other 100 million board feet. Lumber products only accounted for 40% of the annual timber harvest, with the majority of the harvest (60%) processed into pulpwood, railroad ties, piling, cordwood (i.e., fuel wood), tanbark, staves, shingles, lath, and charcoal.

In total, Maryland's primary forest industry harvested over 49 million cubic feet of wood each year. The trouble was that this harvest amounted to a very large over-cut of the growing stock: with less than 10% of the forests suitably stocked with sawtimber and annual growth only providing 70% of the harvest, it was obvious that our forests were being depleted rapidly. In characteristic fashion, Maryland's first State Forester Fred Besley reacted to this dilemma with optimism and purpose. Rather than condemn the industry for over-consumption, he rightfully observed that the industry was much too important to allow it to weaken, and thus the solution was simply to grow more wood in our existing forests. In fact, he confidently stated that "there is little doubt that in a comparatively few years time the production of Maryland's forests might be raised 100 percent".

Today, we can see the results of these efforts. Roughly equal acreage of forest (2.5 million acres)



harbors over 16 billion board feet of timber (a four-fold increase). The rate of growth annually has almost tripled during the last century. Harvested volumes remain relatively constant at approximately 200 million board feet yearly, and yet annual growth exceeds removals by at least 25%. Manufacturing still remains a vital component to Maryland's welfare, with our wood industries being major players in the manufacturing sector. Statewide, wood industries employ in excess of 14,000 persons in 928 plants, which is 9% of all manufacturing jobs. Secondary wood manufacturing today is still centered chiefly in the Baltimore region with Allegany and Caroline

Counties now the runner-ups. Maryland is more self-sufficient in meeting its wood needs, with approximately 62% of its wood supply furnished from local forests. Clearly, the forest industry has demonstrated its resiliency and adaptability. Thanks to this industry, thousands of Marylanders are provided livelihoods, consumers enjoy a higher standard of living, and our environment is **sustainability** conserved and enhanced.

Notes.

Historical data collected from the following sources:

1. Besley, F.W. 1916. The forests of Maryland. Baltimore: Maryland State Board of Forestry. 12 p.
2. Besley, F.W., and J.G. Dorrance. 1919. The wood-using industries of Maryland. Baltimore: Maryland State Board of Forestry. 122 p.

Contemporary data collected from the following sources:

3. Frieswyk, Thomas S. 2001. Forest Statistics for Maryland: 1986 and 1999. Resour. Bull. NE-154. Newtown Square, PA: US Department of Agriculture, Forest Service, Northeastern Research Station. 164 p.
4. Irland, Lloyd C., A. Goetzl and R. Wieland. 2004. Forest Production, Industry and Forest Retention Assessment. MCAE Pub-2004-01. Queenstown, MD: Maryland Center for Agro-Ecology, Inc. 221 p.