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The Growth and Economic Significance of the AMERICAN FUR TRADE, 1790-1890

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ALTHOUGH there are excellent works on almost every aspect of the American fur trade, an over-all statistical study has never been compiled. Consequently, while most of the virile adventures of fur trade history have been told in vivid detail, several fundamental questions of considerable significance have been left unanswered. Foremost among these questions are: To what extent, if any, was the fur trade related economically to the westward movement? Did the fur trade ever have real economic importance, either nationally or by region? Was the center of its operations always in the Far West? Was the beaver actually the leading fur, or did it only appear to be? Finally, were the famous trading companies we know so much about more important than the thousands of independent traders who left few if any records? The answers to these and similar questions can be approached only through statistical methods.¹

THE USE of the word "fur" in such a study needs careful definition at the outset. As employed here the term includes all animal peltries of commercial significance used as material in lining or trimming articles of wearing apparel, or for constructing entire garments. Heretofore, certain somewhat

exotic species of fur bearers, such as the fur seal, and some very common but not exotic furs, such as the raccoon, have been excluded from many fur trade studies for reasons that are not entirely clear.

American fur traders usually divided their pelts into four categories: furs, skins, robes, and hides. Under "furs" were grouped all of the fur-bearing rodents (including the fiber-producing beaver), felines, canines, weasels, and marsupials. "Skins" almost always meant those of deer, bear, or raccoon, but might include a few elk, moose, and, later, antelope. A "robe" always referred to

¹ This study is arbitrarily limited to the United States during the century 1790-1890 because substantial fur trade data of a statistical nature already exists for the Colonial period — see Murry G. Lawson, *Fur: A Study in English Mercantilism, 1700-1775* (Toronto, 1943) — and because the frontier had virtually disappeared by 1890. By "United States" is meant not only the territory within its jurisdiction but also the territorial waters and furs taken on the high seas by hunters flying the Stars and Stripes. The writer has chosen the path of conformity rather than accuracy in using "United States" and "America" synonymously — a practice for which he owes an apology to Canadian and Mexican readers. Finally, a note of gratitude to several persons who have made helpful comments on this paper: Dale L. Morgan, Oscar O. Winther, Douglass C. North, Paul W. Gates, David M. Ellis, John E. Sunder, and some whose names are not known to the writer.

one side of a winter-killed buffalo cow or of a young bull dressed with the fur on, and a "hide" was the full pelt of a summer-killed buffalo cow, dressed without the hair, or of a short-haired bull. These definitions will be followed throughout this paper. When the term "furs" alone is used, it is meant to include skins also, where appropriate.

To acquire reliable data on the growth of the American fur trade for the period 1790 to 1890, when the buffalo herds were gone, the frontier was settled, and urbanism was well advanced, it would normally be neces-

² Among a dozen depositories, the most complete American Fur Company production statistics seen by the writer are in the company records at the New-York Historical Society. All American Fur Company papers cited in this article are in this collection.

³ See especially "Furs and Skins," American Fur Company Papers; "Packing Book, 1830-33," and "Fur Sales at New York City, 1859-64," Chouteau Collection in the Missouri Historical Society, St. Louis. Returns of the 1840 census show that furs and skins worth \$1,065,896 were gathered in the United States that year; the secretary of the treasury reported that furs and skins exported for the year beginning October 1, 1839, were valued at \$1,237,789. In 1842 *Niles Weekly Register* said the value of furs and skins gathered in that year was \$760,214. Exports for the year beginning October 1, 1841, amounted to \$598,000. These figures, although not absolutely reliable, tend to substantiate available company records. *United States Census*, 1840, *Statistics of the United States*, 408; 26 Congress, 2 session, *House Executive Documents*, no. 122, p. 252 (serial 386); 27 Congress, 3 session, *House Documents*, no. 220, p. 10, 46 (serial 425); *Niles Weekly Register*, 63:27 (1842). C. M. Lampson, London's leading fur merchant of the time, maintained that the whole of the American fur crop eventually found its way to the London market. Lampson to Ramsay Crooks, December 1, 1845, American Fur Company Papers. For a thorough bibliography on the economics of the post-Civil War fur trade, see Ernest Thomas Seton, *Life-Histories of Northern Animals: An Account of the Mammals of Manitoba*, 2:1203-1220 (New York, 1909).

⁴ Poland, *Fur-Bearing Animals in Nature and Commerce*, xxvii-xxx (London, 1892). Figures on fur exports may be found in the annual treasury reports, published as *House Executive Documents* and also bound separately after 1817 as *Annual Reports of the Secretary of the Treasury*. These figures have been compiled for the years prior to 1884 in 48 Congress, 1 session, *House Miscellaneous Documents*, no. 49, part 2, p. 32, 130 (serial 2236). They are lacking for the years 1792-95. Herein they are cited as Secretary of the Treasury, *Annual Reports*, except where a specific report is quoted.

sary to determine the number, kind, and value of all pelts gathered throughout the United States for every year in question. This is impossible. Such data exists neither for the country as a whole nor for any given region within it. There are accurate production records for a few of the larger companies during a limited number of years, but such data alone is too scanty to show production flows by region.²

Fortunately there are other ways of measuring the growth of the fur trade. All available data indicates that before the Civil War the bulk of American furs were exported rather than consumed at home. Records of the leading fur companies clearly testify to this. They are substantiated by the census returns of 1840, the only year in which the trade was surveyed, and by a statement of the leading fur merchant in London. For the decades following the Civil War, supporting data is less voluminous but no contrary evidence is apparent, and the pattern of exports remained unchanged. Export figures, therefore, are the most reliable indicators of the growth of the American fur trade during the nineteenth century.³

During the whole of this period the majority of furs shipped abroad went to Great Britain. Figures compiled before 1822 are not always reliable, but from that date until 1890 Great Britain received 74 per cent by value of all United States fur exports. A record was also kept of both the number and kind of furs shipped from the United States to Great Britain; consequently, the trends of the trade for that period can be determined with reasonable accuracy. Henry Poland compiled a list of fur importations into Great Britain by species and origin for every year from 1763 to 1891. This record is the best starting point for any extended analysis of the fur trade of North America.⁴

Historians have been reluctant to use Poland's data, possibly because the sources cannot be verified. When corroborated by available records of the major American fur companies and by data from government sources, however, Poland's figures can be

most valuable for showing trends over a fairly long period. For example, his general accuracy can be checked by valuing each species of fur bearer according to the prices offered by the American Fur Company for number 1 prime skins, less 20 per cent for nonprime skins. The writer did this for all years from 1820 to 1850, except six for which price data is unavailable. Poland's figures were found to be within 10 per cent of the value of fur exports to Great Britain as listed in the annual reports of the secretary of the treasury. Again, one may also check Poland's tabulations for the major fur bearers during the years 1831-43 against those given in John MacGregor's *Commercial Statistics* (1850). Although the data often differs widely for any given year, the trends are invariably the same.⁵

Prior to 1822, Poland's data is not very useful. His figures are rounded and appear to be estimates rather than tabulations, and before the 1820s many British companies were gathering furs within the United States and their returns cannot be separated from Poland's figures. For this period, therefore, one must rely on United States export tabulations alone.

Judging from the annual reports of the secretary of the treasury, the American fur trade grew rapidly during the latter part of the 1790s, fell off somewhat at the turn of the century, and then almost doubled its production until it was cut short by the embargo of 1808. Thereafter it languished until the close of the Napoleonic Wars in 1815, only to rise again with renewed vigor as Europeans, long deprived of luxuries, began buying furs in large quantities. Unfortunately, there seems to be no way of breaking down the trade on a fur-by-fur basis for these early years. All authorities agree, however, that the beaver was of commanding importance.

Beginning in the 1820s the American fur trade entered a period of sustained growth which was not to abate until the Great Depression of the 1930s. According to Poland, the total number of furs and skins exported

from the United States to Great Britain increased substantially in every decade from 1820 to 1890. His data is substantiated by the annual reports of the secretary of the treasury, which show that the value of fur exports to Great Britain increased in every decade. Together, these figures indicate that the American fur trade underwent considerable growth from 1820 to 1860 instead of declining, as many have supposed. More important, they show that a further fivefold increase in exports occurred between 1860 and 1890. Paradoxically, this later period of greatest expansion has received the least attention from historians.

NOT ALL of the furs exported increased in quantity during this period, and some actually declined. According to Poland, of the twelve varieties shipped to Great Britain prior to the Civil War, there was a substantial and steady increase in muskrat, raccoon, fox, and mink, and a moderate increase in deer, otter, and wolf. The number of fisher and bear pelts rose in the 1830s but diminished thereafter. Only two furs decreased consistently: beaver and marten. Poland's figures clearly indicate a general pattern of growth during the years 1820-60, not simply a large increase in one or two furs.

These trends are substantiated by the available records of the major companies engaged in the trade before the Civil War. The American Fur Company—by far the largest and most important trading concern in the United States at that time—kept accurate lists of all furs received from its outfits. These are available in summary form for the years 1829-31 and in complete detail for 1834-45. The Chouteau companies of St. Louis kept a partial record of the furs and skins marketed, and this information is also available for the years 1831, 1835-39,

⁵ Poland's figures may have come from Hudson's Bay Company records, from trade information available when he compiled his work, or from His Majesty's Custom and Excise. Alice M. Johnson of the Hudson's Bay Record Society, London, to the author, June 26, 1962; R. W. Hyman of the British Museum, London, to the author, June 25, 1962.

and 1860-61. This data represents a sizable percentage of the United States fur returns from the late 1820s to the early 1860s.⁶

To illustrate, from 1829 to 1831 the American Fur Company harvested annually an average of 708,000 furs, mostly muskrat, raccoon, deer, and beaver. These figures include the harvest from both the Far West and the Great Lakes region. A decade later, from 1835 to 1842, the American Fur Company, having yielded its territory west of the Missouri River to the Chouteaus, averaged 589,000 robes, furs, and skins annually. These returns, however, were for the Great Lakes region alone. Add to this approximately 214,000 furs that were marketed yearly by the American Fur Company for the various Chouteau companies. These furs were included in the earlier figure, and if they are taken into account the total is 803,000 compared with 708,000 for the 1829-31 period. This is an impressive increase in light of the fact that by 1835-42 the fur trading area had been considerably reduced by settlement.

The growth of the American fur trade from 1820 to 1860 can also be shown by the value of furs harvested. This method of measurement affords a number of insights not apparent if the trade is gauged by numbers only. Figures for the average annual

⁶ See 22 Congress, 1 session, *Senate Documents*, vol. 2, no. 90, p. 78 (serial 213); "Furs and Skins, 1834-42," and "Receiving Books," vol. 3-6, American Fur Company Papers; "Packing Book, 1830-33," Chouteau Collection.

⁷ Figures on muskrat skins are calculated from a table in Anne Bezanson, Robert D. Gray, and Miriam Hussey, *Wholesale Prices in Philadelphia, 1784-1861*, 2:150 (Philadelphia, 1936). Bezanson's price data is based on the average monthly price of number 1 prime muskrat at Philadelphia, second only to New York City as a fur marketing center in the United States. World prices were set at London and Leipzig.

⁸ The most useful studies of the economic aspects of the buffalo robe trade are Frank Gilbert Roe, *The North American Buffalo* (Toronto, 1951); William T. Hornaday, "The Extirpation of the American Bison," in Smithsonian Institution, *Annual Report*, part 2, p. 367 (Washington, 1889); Seton, *Lives of Northern Animals*, 1:247-303; Martin S. Garretson, *The American Bison* (New York, 1938).

value of furs and skins exported from this country are available in the United States Treasury reports for all but four years since 1790. Although they are probably not absolutely accurate for any single year prior to the 1820s, they show conclusively that except for the period of the embargo and the War of 1812 the value of exports was steadily growing from 1796 to 1890. It is apparent that the rate of growth from the 1820s to the 1890s, measured by value of exports, is somewhat less than when measured by the numbers of furs and skins shipped to Great Britain. This difference is easily explained. The furs which constituted the bulk of the export trade depreciated in value; if an increase in price occurred, it lagged considerably behind the proportionate increase in numbers. The average annual price of muskrat skins in the 1850s, for example, was only nine cents; hence, although the number of muskrats exported to England increased by 8,930,000 during the decade, the value added was only \$80,280.⁷ Also, those furs that increased most rapidly in numbers were generally the least valuable.

Thus far we have said nothing about the growth of the trade in relation to the domestic market. What evidence we have—and it is admittedly scanty—suggests that no single pelt was of greater importance during the second (and possibly the third) quarter of the nineteenth century in the domestic market than the buffalo robe.⁸ In every year for which we have reliable records of peltries sold by the Chouteaus, robes were from two to three times more valuable in the aggregate than any other pelt. By the early 1860s, robes represented almost 90 per cent by value of all pelts marketed by that company. Buffalo robes were second in aggregate value in the returns of the American Fur Company from 1835 to 1842.

Beyond a crude estimate, the number of robes marketed in the United States during any decade is undeterminable. For the 1820s, receipts at New Orleans are probably the best indicator of robes harvested. From 1822 to 1830 an annual average of 8,689

packs or approximately 104,000 robes was deposited for reshipment to New York City. During the 1830s this figure fell to 3,140 packs or about 37,600 robes per year, but by that time many western robes were beginning to be shipped via more northerly routes to eastern and midwestern markets. Available data for St. Louis receipts during the 1830s indicates that about 90,000 robes per year were sent down the Missouri River, and this increased to 100,000 per year during the 1850s and 1860s.⁹ Beyond this, one cannot be specific. The domestic trade in furs was probably never as important, however, as the export trade.

AS TO the nature of the American fur trade, it is abundantly clear that it may be divided economically into three major eras characterized by the dominant fur of the time. From 1790 to the 1820s this was, of course, the beaver. Through the 1860s the raccoon was most important, and from the 1870s to the 1890s the fur seal predominated.

The era of the beaver is the best understood and on it there is little new information to offer. The trade in beaver reached its apogee during the first decade of the nineteenth century. These ten years saw pelts estimated at \$160,000 sent to Great Britain annually. Following the War of 1812, production fell markedly. According to Poland the number of beaver skins imported into Great Britain from the United States plummeted from about 56,000 annually between 1818 and 1822 to less than 7,000 yearly from 1823 to 1827. Because before 1822 beaver exports had represented more value than all other furs combined, the removal of this bulwark brought a decline in the trade as a whole. In 1825, however, the price of beaver began to rise rapidly and by 1830 it had almost doubled. This increase naturally led to more vigorous and extensive trapping, particularly in the Far West, and in 1828 exports were rising again. Receipts of furs at New Orleans, for example, show a steady increase from 24,000 pelts in 1827 to over 96,000 pelts in 1833.¹⁰

From 1828 to 1833 the fur trade grew vigorously and during this period almost all of the companies expanded operations. Exports rose steadily from \$442,000 in 1827 to \$842,000 in 1833, the latter figure the highest for any year since the War of 1812. The price of beaver averaged \$5.99 per pound in Philadelphia during these years and was higher than for any comparable time between 1784 and 1861.¹¹ This five-year period is sometimes considered the heyday of the American fur trade. If one compares it only with the years immediately preceding and considers beaver alone, such an interpretation is partially justified. It is more correct, however, to view the late 1820s and early 1830s as the last vigorous gasp of a dying era, whose glory was perched perilously on high prices and romantic exploits rather than upon solid production.

In 1834 the substantial control of the trade by the American Fur Company was broken when John Jacob Astor sold out to his partners, Ramsay Crooks, Pierre Chouteau, Jr., and others. Before that year the firm had probably controlled about three fourths of the export market, but thereafter the company, together with its exclusive agents, was to be content with about half the market. By the late 1830s new concerns had moved into areas previously controlled by the American Fur Company, and unusually bitter competition was the result. This was notably the case in the Ohio Valley—a prolific fur-producing region—where the firms of George and William Ewing pressed the older company especially hard. As a direct consequence of this renewed competi-

⁹ See Roe, *The North American Buffalo*, 489-520; Hornaday, in Smithsonian Institution, *Annual Report*, part 2, p. 502; Merrill Burlingame, "The Buffalo in Trade and Commerce," in *North Dakota Historical Quarterly*, 3:262-291 (July, 1929).

¹⁰ Poland, *Fur-Bearing Animals*, xxvii-xxx; Bezanson, Gray, and Hussey, *Wholesale Prices in Philadelphia, 1784-1861*, 2:7; Isaac Lippincott, *A Century and a Half of Fur Trade at St. Louis*, 233-239 (Washington University, Studies, vol. 3—St. Louis, 1915).

¹¹ Calculated from a table in Bezanson, Gray, and Hussey, *Wholesale Prices in Philadelphia, 1784-1861*, 2:7.

tion, the quantity and value of fur exports doubled after 1838, and in 1840 they were larger than for any previous year in the century.¹²

Contrary to some accounts, figures indicate that the depression of 1837-39 had little effect on the American fur trade. The value of exports remained stable from 1836 to 1838; thereafter it rose sharply until 1841. Prices were set by the London auctions, and European demand held steady until May, 1841, when the market collapsed, as it did periodically. By 1843 exports had experienced the severest decline since the 1820s. Beaver dropped to \$2.62 per pound, the lowest price since 1809, and muskrat fell to the lowest figure since the American Revolution, except for a short period in 1838-39. Even with this disastrous situation, however, the average annual value of exported furs from 1840 through 1845 was higher than for any peak year since the War of 1812.¹³

The key to this incongruous situation is not hard to find. During the mid-1830s the ubiquitous and unpretentious raccoon quietly replaced the august beaver as the

dominant fur in the American trade. Raccoon exports to England during the 1830s more than doubled over the previous decade, rising to above 2,500,000, with a value estimated at \$1,431,000.¹⁴ Moreover, unlike beaver, substantial numbers of raccoon pelts were retained in the United States for use as hats, coats, and trim. Unfortunately there is no way of measuring the extent of this domestic trade, although it was undoubtedly large.

This shift not only marked the end of an epoch but also the end of a process as old as the trade itself. From the very beginning of the North American fur trade, the beaver had been the most sought-after fur bearer. Strangely enough, it was popular not for its pelt but for its fiber, the short, downy gray felt at the base of the guard hairs. This fiber was pounded, mashed, stiffened, and rolled into hats by experts in Europe. In the 1830s wool, silk, and other materials came into use for hats. Strictly speaking, therefore, the period before the 1830s should be called the fiber trade and not the fur trade, because the "fine fur" bearers played only a minor role in comparison with the beaver.

THE PLACE of the raccoon as a fur bearer is not generally recognized. It was trapped in significant numbers only to the north of the Ohio River, and that area received little attention from writers on the fur trade after the raccoon became important. Outside the Great Lakes region the raccoon was of no significance. Only a few were found in Canada and the Far West. Within the Ohio Valley, the raccoon was trapped primarily in Indiana, Ohio, and Illinois, but it was found in considerable numbers throughout the region. The finest pelts came from the Kankakee and White River basins in Indiana and were darker in color than those taken elsewhere, some being almost completely black. Those taken to the east of this region were nearly as good, but raccoons from south of the Ohio had short, thin pelts and were not marketable.¹⁵

Several factors were responsible for the

¹² 22 Congress, 1 session, *Senate Documents*, vol. 2, no. 90, p. 78; Secretary of the Treasury, *Annual Reports*. The Detroit Department of the American Fur Company harvested 132,000 furs in 1838, and increased competition raised this figure to 727,000 by 1840; see "Furs and Skins," in American Fur Company Papers.

¹³ Bezanson, Gray, and Hussey, *Wholesale Prices in Philadelphia, 1784-1861*, 2:7, 150; Secretary of the Treasury, *Annual Reports*; Anne Bezanson et al., *Wholesale Prices in Philadelphia, 1852-1896*, 269 (Philadelphia, 1954); Poland, *Fur-Bearing Animals*, xxx-xxxii.

¹⁴ Seton believed that not more than half of the raccoons killed were marketed in London. *Life-Histories of Northern Animals*, 2:1017.

¹⁵ Of the 561,000 raccoons gathered by the American Fur Company in 1835-42, almost 500,000 came from the Ohio Valley. On the natural habitat of the raccoon, see Seton, *Life-Histories of Northern Animals*, 2:1013; John James Audubon, *Quadrupeds of North America*, volume 2, under "raccoon" (New York, 1849). On the raccoon trade, see Bert Anson, "The Fur Traders in Northern Indiana: 1796-1850," Ph.D. thesis, University of Indiana, 1943; Anne Ratterman, "The Struggle for Monopoly of the Fur Trade," Master's thesis, University of Minnesota, 1927. References to the basins of the Kankakee and White rivers in Indiana are numerous in the American Fur Company Papers.

increased significance of the raccoon trade. In 1837 the Russians lowered their fur tariff, and raccoon skins were particularly sought after by Russian Jews and Poles, who demanded coonskin caps à la Davy Crockett. The czar interdicted their use in 1846, but in the meantime demand for the heavy, long-haired, densely furred pelts had risen in Germany, where they were used not only for hats but for trimming coats and were preferred to the lighter, less bulky furs in use today. During these years almost all raccoon pelts were sent first to London, where C. M. Lampson and Company controlled (and stabilized) the market, re-exporting in turn to eastern Europe.¹⁶

At the same time a uniquely favorable situation in America aided the expansion of raccoon production. In 1825, at the request of the Osage Indians, the federal government began to pay individual Indian debts to fur traders out of tribal funds. The philosophy behind this practice was simple: The government was vitally interested in Indian land cessions to meet the needs of an expanding population. Since the good will of a trader was often crucial to the successful conclusion of a treaty, United States authorities saw no evil in speeding the negotiations by providing for the satisfaction of traders' claims. This practice — perhaps innocuous at first — grew gradually but steadily until by the late 1830s about \$200,000 was secured annually by traders from Indian treaties, and in 1842 such claims amounted to over \$2,000,000. The bulk of this money was paid to individuals in the Great Lakes region — the heartland of raccoon production.¹⁷

This powerful government subsidy, most of which was doled out during the depression years of 1837-42, gave several companies and many individual traders a new lease on life and invigorated the region's fur industry. A small operator with a capital investment of only \$1,000 might receive more than that amount in claims paid, while large corporations fared even better. From 1835 to 1838, for example, the American Fur

Company received over two thirds the value of its stock in government money and paid dividends totaling 50 per cent. Although payments to other firms are not so well documented, it is known that the Ewings of Indiana continued their fur trading operations long after these had ceased to be profitable, solely as an excuse for submitting further claims.¹⁸ Thus, when the demand for raccoon increased, conditions for meeting it were unusually propitious.

The price of raccoon varied widely after the late 1830s. Before that a pelt was worth about fifty cents; thereafter sometimes as much as \$1.25. About two thirds of the raccoon crop of the American Fur Company was graded number 1 prime, and about a third of this was labeled "Indian Handled."¹⁹ Such pelts were more carefully cured, usually softened by chewing, and were consequently worth more. Every effort was made to expedite handling because the raccoon pelt deteriorated faster than most other furs.

Despite the Russian interdiction of 1846, the raccoon continued to dominate the American fur trade until after the Civil War. According to Henry Poland, over 4,000,000 pelts were exported to England during the 1840s, almost double the number sent in the 1830s, and the two decades which followed

¹⁶ See especially the correspondence between Ramsay Crooks and C. M. Lampson in the American Fur Company Papers, and the Crooks-Ewing correspondence in the George W. and William C. Ewing Papers, Indiana State Library, Indianapolis.

¹⁷ See Charles Kappler, *Indian Affairs: Laws and Treaties*, 2:220 (Washington, D.C., 1904); 23 Congress, 1 session, *House Reports*, no. 474, vol. 4, p. 95-128 (serial 263); 31 Congress, 1 session, *House Reports of Committees*, vol. 3, no. 489 (serial 585). Debt claims are provided for in many of the treaties in Kappler, *Indian Affairs*, volume 2. Claims payments to traders and companies may be found in the index to the "Special Files," a series of unclassified folders in the Records of the Bureau of Indian Affairs, National Archives.

¹⁸ See Ramsay Crooks to Wildes and Company, July 30, 1836; John Whetten to William Brewster, February 20, 1837; Crooks to Brewster, May 18, 1839; all in American Fur Company Papers; 23 Congress, 1 session, *House Reports*, no. 474, p. 95-128.

¹⁹ "Furs and Skins," in American Fur Company Papers.

accounted for over 9,000,000. Other furs such as muskrat were produced in greater quantities, but their total value was still considerably less than that of raccoon. Although we do not have reliable price data on all the furs in the trade, it is incontestable that until the 1870s the raccoon continued to be America's most important fur export.²⁰

IF POLAND'S FIGURES are reliable for showing trends before the Civil War, we may fairly assume that they continued to be, and we may use them for the same purpose in the years that followed the conflict. Exports to Great Britain indicate that three furs showed remarkable growth after the Civil War: mink, skunk, and fur seal. During the 1860s approximately 32,000 mink were exported annually to Great Britain; by the end of the eighties this figure had risen almost tenfold. Behind this increase in mink exports was a rise in price from about \$2.50 per pelt in 1860 to \$4.00 in 1873.²¹ This increase — dictated by fashion

— led to the domestication of mink and the establishment of mink ranches in the United States during the mid-1870s. Beginning in 1876, however, the price of mink declined rapidly and did not rise again until the twentieth century.

The growth of the skunk fur industry was about half as fast as that of mink. During the 1860s annual exports of skunk to Great Britain amounted to about 100,000 pelts; by the eighties this figure had tripled. Worth not more than 25 cents in 1860, the value of a skunk pelt rose to \$1.00 by 1870 and remained about there until the 1890s.²²

It was the fur seal, however, which clearly dominated the American trade from the 1870s to the 1890s. No other fur was even half so important in aggregate value.²³ Indeed, the seal was by all odds the most important pelt economically in the American fur trade until the twentieth century.

During the early part of the nineteenth century, hundreds of thousands of seal pelts were taken from the South Pacific. These were usually marketed in China and Russia, but owing to indiscriminate slaughter the seal rookeries in that area were soon depleted. During the early and mid-nineteenth century, agents of the Russian government had also been harvesting about 20,000 fur seals annually from the Bering Sea, but because the pelts were poorly cured, demand for them was insignificant.²⁴

With the purchase of Alaska by the United States in 1867, however, the number of fur seals exported from American jurisdictions increased almost immediately to over 100,000 a year. We have accurate and reasonably complete data on the fur seal industry after that date. The United States government in 1870 awarded a twenty-year lease of the seal fisheries on the Pribilof Islands to the Alaska Commercial Company, which was allowed to harvest 100,000 mature bachelor seals annually, paying in return a yearly rent of \$55,000, and \$2.62 in taxes on each pelt taken. From 1870 to 1890 the company harvested over 1,800,000 fur seals at an estimated profit of \$18,754,000.²⁵

²⁰ Poland, *Fur-Bearing Animals*, xxx-xxxii; Bezanson, Gray, and Hussey, *Wholesale Prices in Philadelphia, 1784-1861*, 2:150. See also Bezanson et al., *Wholesale Prices in Philadelphia, 1852-1896*, 17, 101, 203, 206, 269, 302.

²¹ Poland, *Fur-Bearing Animals*, xxx-xxxii; Bezanson et al., *Wholesale Prices in Philadelphia, 1852-1896*, 302.

²² Poland, *Fur-Bearing Animals*, xxx-xxxii; Bezanson et al., *Wholesale Prices in Philadelphia, 1852-1896*, 302.

²³ This is based on Poland's returns and Bezanson's prices for beaver, muskrat, mink, skunk, raccoon, and deerskins. For other furs, estimates for scattered years were used.

²⁴ For the most complete study of the fur seal industry, see United States State Department, *Fur Seal Arbitration: Proceedings* (Washington, 1895). Volumes 2, 3, and 9 are especially valuable, specifically, 2:264-267, 9:529-534. The best authority on the subject is Henry W. Elliott. See especially his "The Fur Seal Industry of the Pribylov Islands, Alaska," in George Goode, *The Fisheries and Fishery Industries of the United States*, 2:321 (Washington, 1887); and his report in 54 Congress, 1 session, *House Documents*, vol. 54, no. 175 (serial 3421).

²⁵ Appendix to the Case of the United States before the Tribunal of Arbitration, 1:104 (Washington, 1892). This is bound with *Fur Seal Arbitration*, vol. 2. See also 63 Congress, 2 session, *House Reports (Public)*, vol. 2, no. 500, part 1, p. 1.

During this period the industry was developed under careful management and in co-operation with C. M. Lampson and Company of London, consignee for nearly all Alaska sealskins. Improvements in dyeing, constancy of supply, and considerable advertising encouraged expansion in the market and a consequent rise in price from \$5.26 per pelt in 1870 to a high of \$35.47 for superior lots in 1890. The skins were shipped first to the west coast of the United States and thence to London. After being sold there they were dyed and dressed, and then about 75 per cent of the total crop was re-exported to the United States. When they entered, an import tax of 20 per cent ad valorem was levied. Thereafter the pelts were dressed again, cut, and finally sold for trimming on coats, sleigh robes, and other popular items. What had begun on the misty rookeries as a fatty fur worth a few dollars was finally sold for about \$70.²⁶

In 1890 a new twenty-year lease was granted to another concern, but the era of the fur seal was virtually over. Although between 1890 and 1910 only 343,356 seals were harvested on the islands, and in 1893 a treaty was signed limiting the wasteful practice of pelagic sealing, by 1910 a mere 133,000 fur seals remained.²⁷

The aggregate value of pelts taken from 1870 to 1891 was \$29,788,582. In addition to this, the United States government had received \$4,894,323 in taxes and \$1,100,000 in rent under the lease with the Alaska Commercial Company. Not to be neglected is more than \$3,000,000 in tariff revenue from the dressed skins shipped back from London for final processing and sale in the United States.²⁸ All told, almost \$40,000,000 was added to the United States economy by the fur seal industry during these two decades, or about eight times the total returns for beaver before the Civil War.

LOOKING BACK to 1790, one is particularly struck by two major organizational changes in the American fur trade during its first century which correspond closely

with the growth pattern just discussed. From the 1790s to the War of 1812 there were no powerful fur trading monopolies in the United States.²⁹ The sea otter trade was handled by a number of small merchants in Boston, seals were sought by an entirely different group, and beavers were taken by literally hundreds of individuals. Competition was fairly open and exports were heavy, amounting to well over \$800,000 annually during the peak years 1804-07. During the 1820s and 1830s, however, when large and powerful concerns such as the American Fur Company, the Rocky Mountain Fur Company, and the Chouteau companies sent hundreds of men great distances into the wilderness in search of pelts, exports fell. Indeed, only in one year (1833) did fur exports exceed \$800,000 during the two decades. These figures give the impression that large companies and monopolistic practices tended to retard rather than expand production.

This impression is strengthened by the history of subsequent decades. By the early 1840s most of the large and famous companies either were leaving the scene or were restricting their activities and taking proportionately fewer furs than before. Replacing them was a host of farmers, lumbermen, and other permanent settlers who began trapping in their spare time. Again exports increased markedly, rising to over \$1,000,000 annually in 1840, 1845, 1846, and from 1857 to 1861. This change is made graphic by comparing the number of furs sent down the Missouri River to St. Louis by the "mountain men" (most of whom worked for some concern) with those sent by farmers and other part-time trappers of a later day. During the era of the mountain men, seldom were more than 3,000 packs of furs sent via the Missouri to St. Louis. From 1879-88 an

²⁶ For a summary of this subject, see *Fur Seal Arbitration*, 2:187-218.

²⁷ 63 Congress, 2 session, *House Reports (Public)* vol. 2, no. 500, part 1, p. 2.

²⁸ *Fur Seal Arbitration*, 3:540-547.

²⁹ See Paul C. Phillips, *The Fur Trade*, 2:54, 57, 99, 100, 137, 152 (Norman, Oklahoma, 1961).

average of 19,000 packs arrived. There may have been some difference in the size of the packs for these two periods, but it is unlikely that a sixfold difference existed. It seems certain therefore that the ubiquitous part-time trapper — the unheralded “egg-money man” — was of considerably more economic importance than the famous mountain man.³⁰

The second major organizational change in the trade relates to the pattern of marketing. In 1870 there were less than two hundred furriers in the United States. They employed 2,900 people and had a gross product of \$8,900,000. By the end of the century, however, the number of furriers had grown fivefold. They then employed over 27,000 workers and had a capital investment of \$30,000,000 and a gross product of over \$55,000,000. The basic reason for this spurt in activity was a rapid increase in the number of persons in the United States able to buy luxuries. This enhanced demand was stimulated by increased advertising.

During those thirty years the United States had begun importing more furs than it exported, thus meeting to a large extent the needs of the wealthier group within its rising population and at the same time beginning to challenge the traditional European fur processing centers of London and Leipzig. By 1900 over \$12,000,000 in duty-free and dutiable skins were entering the United States market — three times the quantity exported. Most of these came partly processed from Great Britain and Germany. By the end of World War I this shift was completed and the United States was the world's leading marketer of furs.³¹

As one might expect, New York State had almost as many furriers as all other

states combined. Three other Middle Atlantic states — Connecticut, New Jersey, and Pennsylvania — together almost equaled New York, an indication that the fur industry of the United States was a highly concentrated one. In the Midwest Chicago, St. Paul, and Detroit were the most important fur-processing centers, and in the Far West only San Francisco had a fur industry worth talking about.³²

THE ABOVE data on the growth of the fur trade, its three distinct eras of production, and its shifting organizational patterns suggest a number of conclusions:

First, the American fur trade was never very important economically, even in its palmiest days. This is true for the Colonial period and for the present century as well. Regardless of continued growth, the fur trade as a business simply did not amount to much, any time, anywhere. Despite the romanticism in which it has been wrapped for many years, despite the number of books about it which continue to appear, it was actually of no importance to the economy of the United States as a whole, and nearly the same is true of its regional significance.

Second, it is incorrect to speak, as some have done, of the “decline of the American fur trade” for any extended period during the nineteenth century. Except for the 1820s and 1880s, fur exports increased, often substantially, in every decade. As one type of pelt fell off in importance, it was simply replaced by another. Nor did the American fur trade decline in relative economic significance, for all during the century it represented approximately 1 per cent of total exports.

Third, the popular idea that the coming of civilization automatically caused the fur trade to decline must be discarded. It not only grew with increased settlement, but on at least one occasion its principal base of operations actually shifted toward the center of population and away from the frontier. The beaver, bear, fur seal, and buffalo declined with the westward movement, but

³⁰ Lippincott, *A Century and a Half of Fur Trade*, 233–239; 51 Congress, 1 session, *House Executive Documents*, no. 6, part 2, p. 391 (serial 2738).

³¹ *United States Census*, 1870 Compendium, p. 802; 1900, *Manufactures*, part 1, p. 8, 218–223, 537; Secretary of the Treasury, *Annual Reports*. See also Harold A. Innis, *The Fur Trade in Canada*, 386–392 (Toronto, 1956).

³² *United States Census*, 1890, *Manufactures*, part 1, p. 334–639.

the smaller animals such as the raccoon, mink, and muskrat seemed to thrive as settlement increased. In short, the inevitable thrust of civilization actually stimulated the vigor of the fur trade and enhanced its relative importance.

Fourth, it is clear that the American fur business was not primarily a far-western phenomenon. From 1790 to the War of 1812 the center of the trade lay east of the Mississippi River and north of the Ohio. Not until after the War of 1812 did it shift to the Missouri River basin and the Rocky Mountains. In the years between 1815 and 1830 most of the beavers trapped in the United States were taken in the Far West, but as beavers began to decline during the 1830s and 1840s, the brief heyday of the western fur trade drew to a close.³³

No other fur took the place of the beaver in that region, although the harvest of buffalo robes increased modestly until after the Civil War. This conclusion is substantiated by the returns received at New Orleans and St. Louis, by available company records, and, more important, by John E. Sunder in the only thorough account of the fur trade of the Far West for this period.³⁴ The Great Lakes region was, in fact, economically more important in the American fur trade than any other. By 1840 the United States Census Bureau estimated the value of fur returns for that year from the Great Lakes region at \$515,000. The Far West, on the other hand, yielded only \$373,000 in furs and skins. In 1841 the Detroit Department of the American Fur Company alone produced \$377,200 in furs and skins.³⁵ This represented about 40 per cent of the total United States fur exports of that year, and the company was but one of several outfits trading in the Great Lakes region. An important reason, of course, is the fact that the habitat of the raccoon was confined to that area.

As the Great Lakes region eclipsed the Far West, it was in turn overshadowed by the Bering Sea and its islands. The value of raccoon exports almost doubled from the 1860s to the 1880s and domestic consump-

tion may also have doubled, but during the 1870s the raccoon was overwhelmed in importance by the fur seal, whose aggregate value in that decade was almost five times greater than raccoon exports. For the whole period under discussion it is quite possible that the fur seal added twice as much value to the United States economy as any other wild animal sought for its skin.

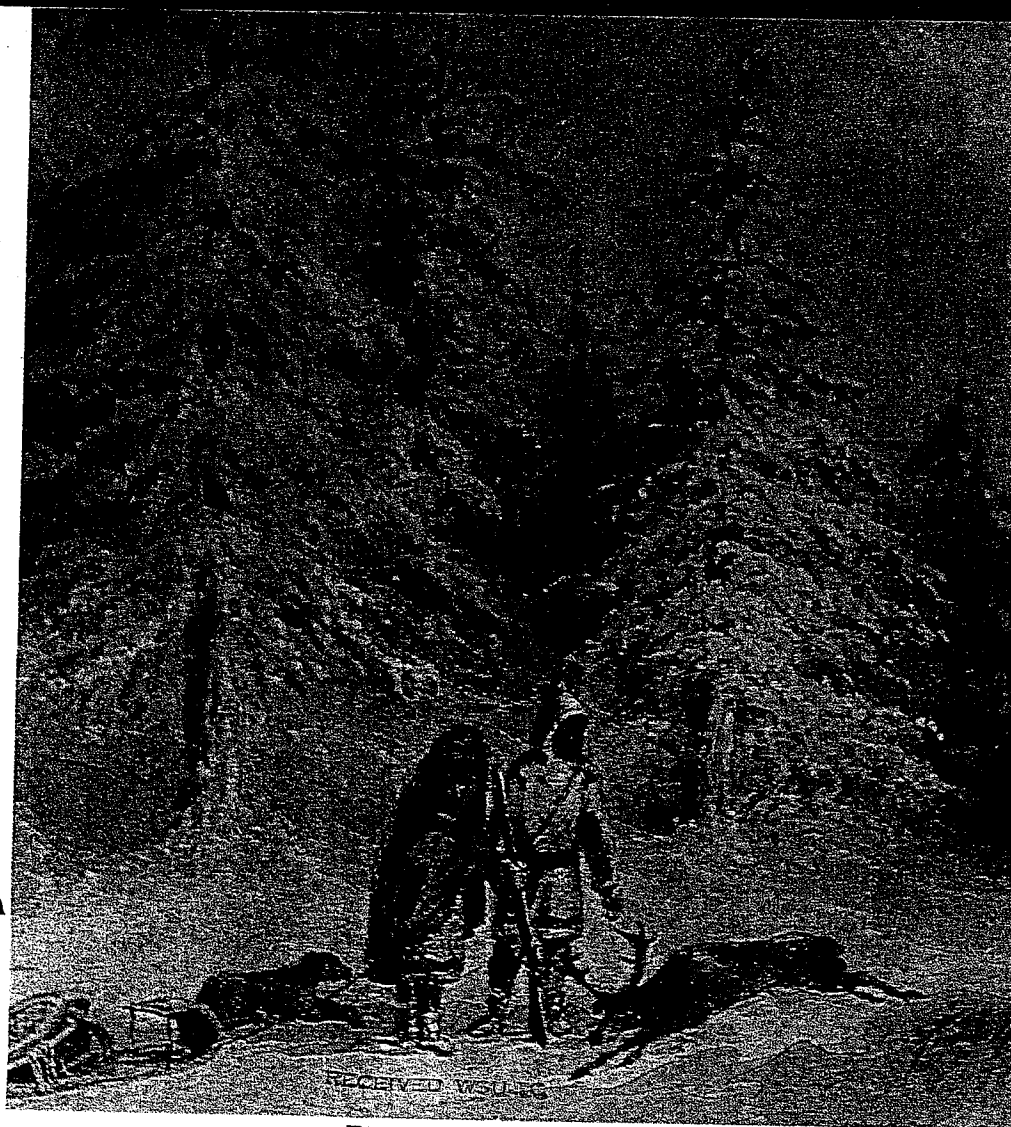
Fifth, and finally, the above evidence lends support to the contention that the fur trade as such did not play a very important role in our dynamic westward expansion. It is true that some trappers eventually became guides for government and emigrant expeditions, but their contributions were minor. There is no correlation between the health of the fur trade and population shifts. Nor, as we have seen, is there consistency in direction of movement. The number of persons involved was insignificant and the value of the trade, even locally, not very impressive. This is not to say that the American fur trade had no importance as a vehicle of westward expansion, but that its importance must be sought in areas other than economics.

³³ Hiram M. Chittenden states that a "fair" estimate of the value of beavers trapped in the Far West from 1815 to 1830 at \$4 per pelt would be about \$1,500,000. *The American Fur Trade of the Far West*, 1:7 (New York, 1902). During these years the value of beaver exports to England, if computed at the same price, would have been about \$2,000,000 according to Poland's figures. Since most pelts went to England, it would appear that the Far West was the major source of beaver during these years.

³⁴ See William F. Switzler, "Report on the Internal Commerce of the United States," part 2, in Bureau of Statistics, *Treasury Documents*, no. 1039b, p. 191 (Washington, D.C., 1888); "Packing Book, 1830-1833," and "Fur Sales, 1859-1864," in Chouteau Collection; "Furs and Skins, 1859-1864," in American Fur Company Papers; John E. Sunder, *The Fur Trade on the Upper Missouri, 1840-1865*, 16, 79, 104, 159, 201, 216-220 (Norman: Oklahoma, 1965). From 1844-53, fur arrivals at St. Louis varied from 1,000 to 3,000, the average being about the same for the end of the period as for the beginning. See Lippincott, *A Century and a Half of Fur Trade*, 233-239.

³⁵ *United States Census*, 1840, *Statistics*, p. 408; "Detroit Department," in Miscellaneous File, American Fur Company Papers.

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THE COVER

• This painting is by Cornelius Krieghoff (1812?-72), a German-born artist, whose wandering took him through Europe and America and finally into Canada, where he painted the pictures for which he is chiefly known. Indians in camp, on the trail, and on the hunt were among his favorite subjects, and in his works they are often arrayed, as here, in brightly colored Hudson's Bay Company blankets.

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