



East Coast Shellfish Aquaculture Status and Trends

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Data Disclaimer

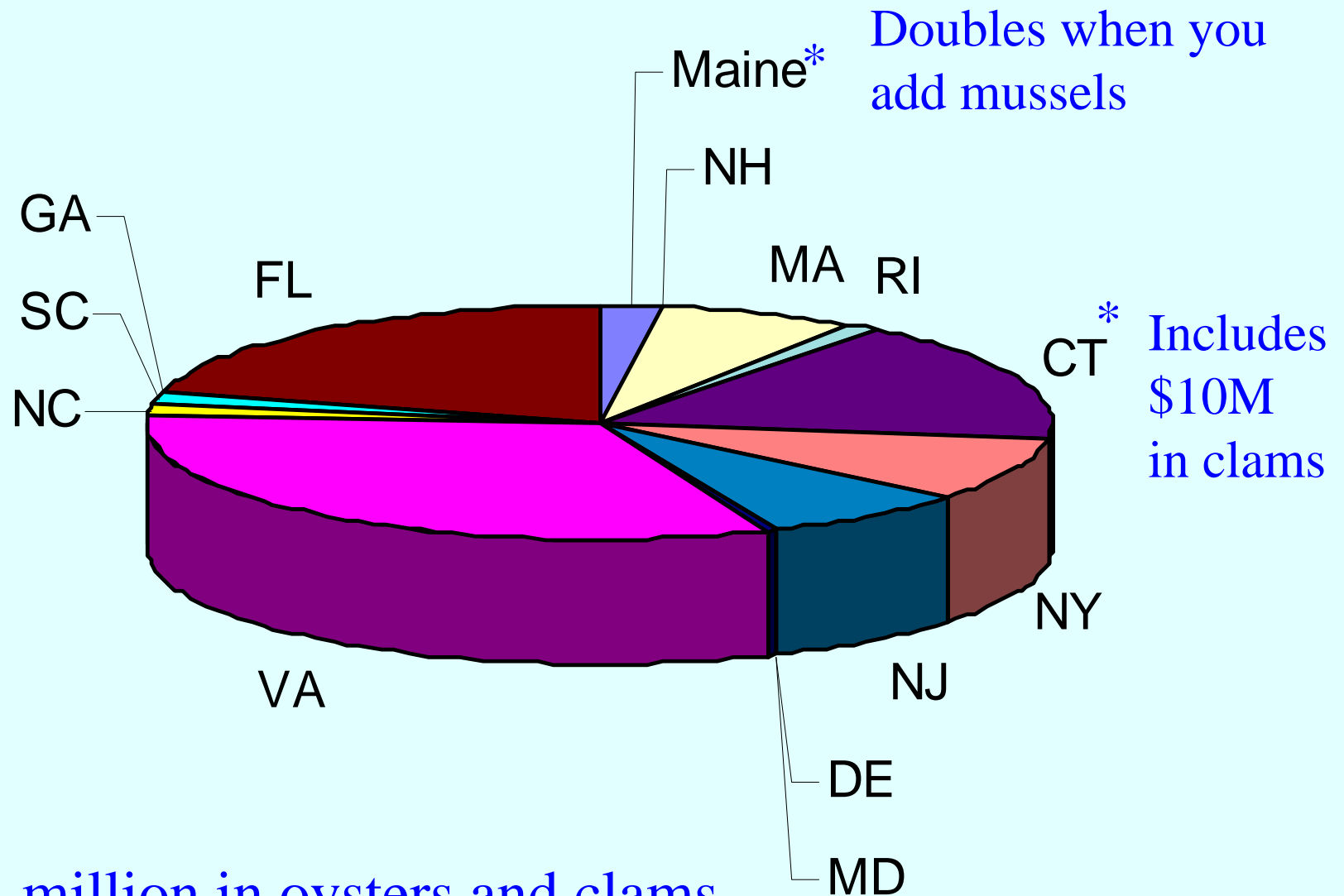
Data collected from a wide variety of sources
– some recent – some not so much

If you have better data – please drop me a
note and I will try and improve my
database

East Coast Shellfish Industry Snapshot

- About 1000 small farms
- Perhaps 10 with more than 10 employees
- About 50 hatcheries
- \$ 91 Million in sales for consumption
 - $\frac{3}{4}$ clams, $\frac{1}{4}$ oysters, mussels, scallops

Shellfish Aquaculture by State



\$91 million in oysters and clams

Maine Shellfish Production

Project Report



**PLANNING
DECISIONS**

Research & Planning

The Economic Impact of the Aquaculture Industry in Maine

**For: The Maine Aquaculture Innovation Center
5717 Corbett Hall, Room 438
Orono, ME 04469-5717**

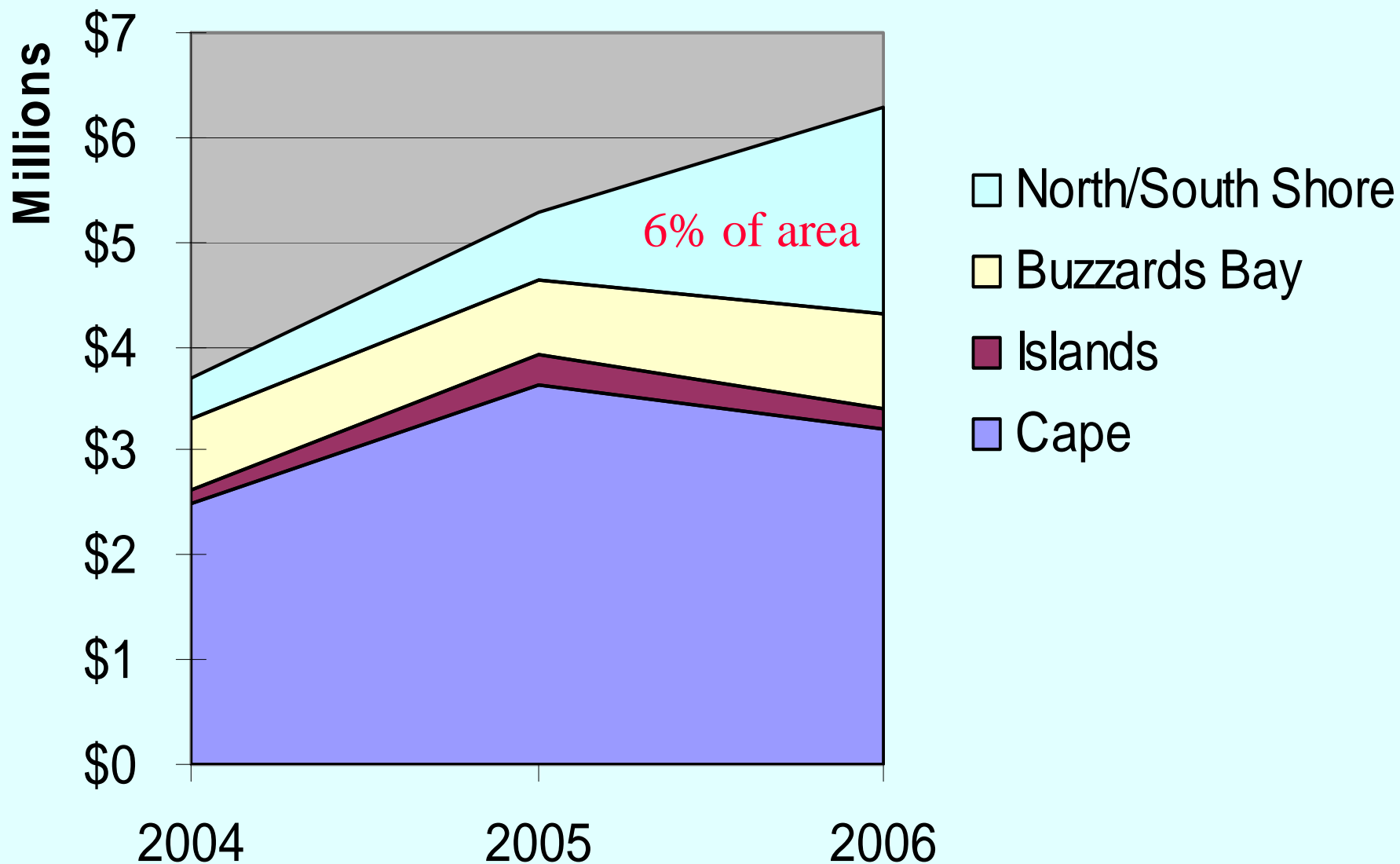
October 10, 2007

**By: Planning Decisions, Inc.
22 Cottage Road, PO Box 2414
South Portland, ME 04116-2414
and
Peter Thibeault
Delphi Global Services**

Maine Production

- 1998 15 farms \$1.5 M sales
- 2005 32 farms \$ 2.8 M sales, 55 jobs
- Split between mussels (8 active leases) and oysters (24 active leases)
- 6 hatcheries, \$1.8 M sales, 35 jobs
- Rapid growth in mussels

Massachusetts Shellfish Production



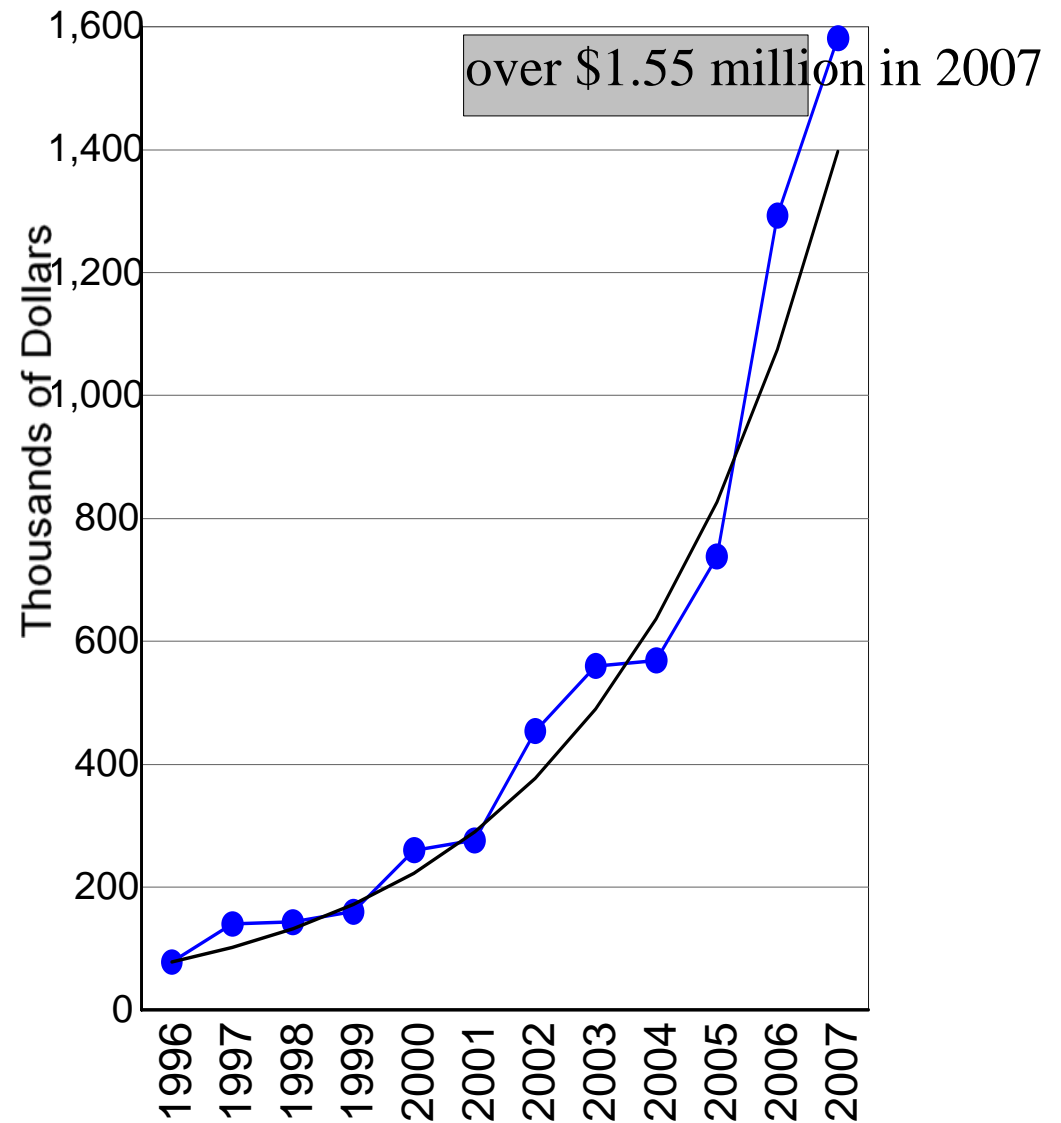
Massachusetts (2006)

- \$3.8 M oysters – increasing
 - More than half from Duxbury on 54 acres
- \$2.5 M clams – steady
 - More than half from Wellfleet of 233 acres
- 304 license holders
- 935 total acres

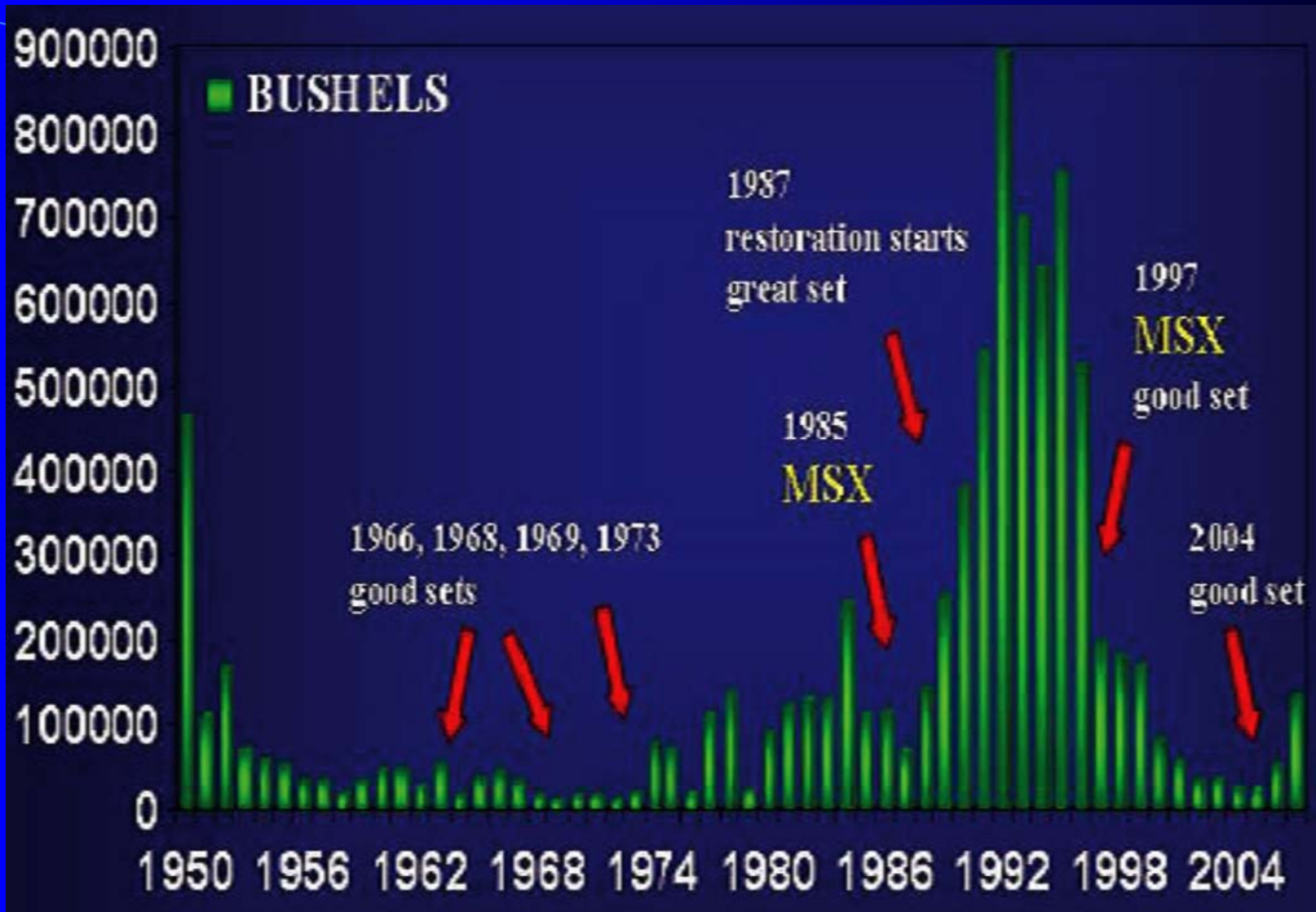
Rhode Island 2007

- All oysters
- Growing 30% / yr
- 30 farms – many expanding acreage
- 128 acres total
- \$12,900 / acre
- 14 full time jobs
28+ seasonal / p.t.

Value of Cultured Oysters Harvested



Connecticut Oyster Landings



CT Production

- 2007 oysters \$5 M , clams \$20.5 M (cultured?)
- 70,000 acres leased, but less than 1/3 planted
- 43 firms (2 dominant)
- 16,500 acres of protected seed beds
- Good set in 2004 pointing to stronger harvests

New York

- \$7.5 M in oysters (2002)
- \$3 M in clams
- 3 commercial hatcheries
- 3 towns have hatcheries for enhancement
- Suffolk County in the process of rewriting its lease and permitting laws

New Jersey Clams

- 17M clams \$2.6M @ 15¢ (2005)
- 15 full-time, 45 part-time
- Market getting tougher
- Leasing system appears “broken”
- 5 hatcheries produced seed

New Jersey Oysters

- About 3-4 growers using container culture
 - Approx \$250,000
- Massive traditional shell planting effort to catch sets and move them up bay where they can survive disease till harvest
 - Approx \$4 M landed value in 2007
- Expansion limited by leasing battles
 - Horseshoe crab preservation trumps jobs

Delaware

- Regulators mired in the belief that shellfish aquaculture cannot be done, will require more work by regulators and will bring in shellfish disease.
- John Ewart's shellfish gardening efforts and expansion of effort across the Bay in NJ may eventually turn the tide.

Maryland

- Powerful Waterman's Association has been successful with efforts to preserve traditional "put-and-take" fishery and has thwarted leasing
- Some small growers have gotten established
- Recent acknowledgement that restoration efforts are not working
- Governor has decided to rewrite all the regulations and lease laws and push for development of an oyster aquaculture industry

Virginia Shellfish Aquaculture

Situation and Outlook Report

Results of 2007 Virginia Shellfish Aquaculture

Crop Reporting Survey



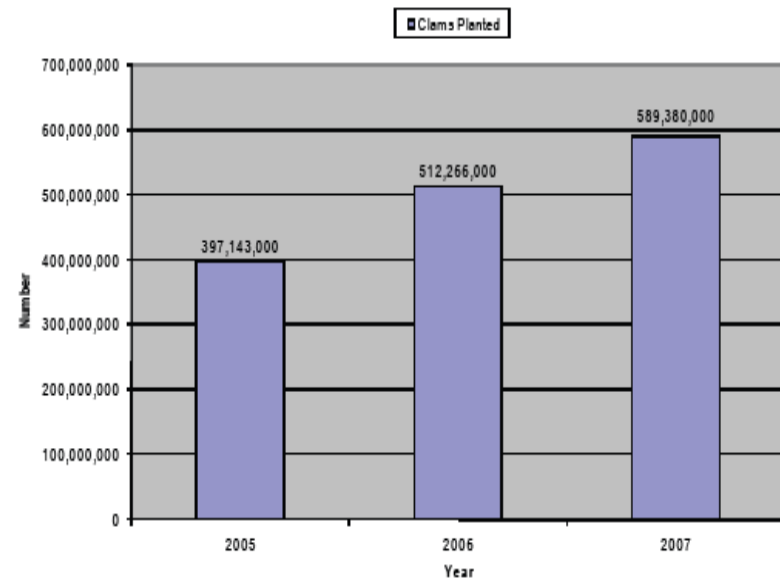
Thomas J. Murray, Marine Business Specialist
Michael J. Oesterling, Aquaculture Specialist

Virginia Sea Grant Marine Extension Program
Virginia Institute of Marine Science
May 2008

Clams planted and sold

- 400M planted in 2005
- 211M harvested in 2007
- 600M planted in 2007
- 168 full time jobs
- 63 seasonal jobs
- Avg. price 13 cents
- \$27 million farm gate
- Price declined 1¢
- Hatchery issues

Figure 1: Number of Hard Clams Planted in Virginia (2005-2007)

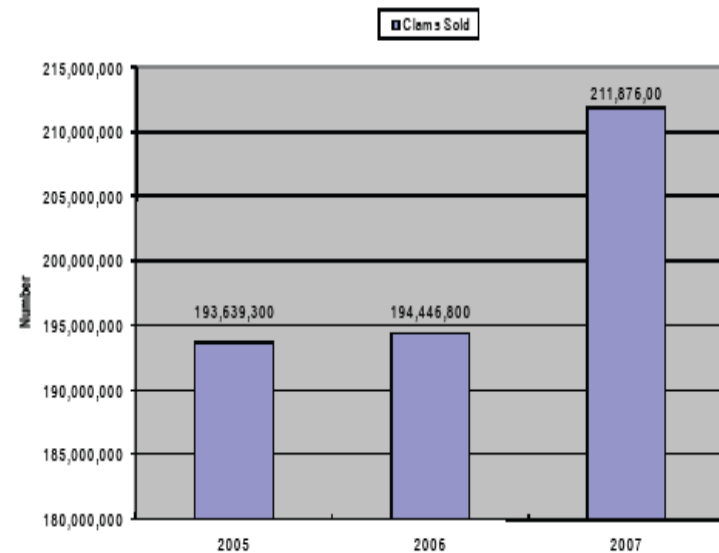


Clam Sales and Prices

The 2007 crop reporting survey provides additional details and information from growers, which reflected a continuing increase (9%) in the total number of Vir-

ginia market clams sold between 2006 and the end of 2007. During 2007 it is estimated that Virginia's total farm output rose to an estimated 211.9 million "market" clams, as shown in Figure 2 below.

Figure 2: Number of Hard Clams Sold in Virginia (2005-2007)



Virginia Oysters

- Over 20M planted in 07
- Most spat on shell
- Bottom plants suffer heavy cow nose ray mortality
- Few sold to half shell market..... yet
- Heavy use of triploids and disease resistant strains
- Seed supply constraining

Figure 6: Number of Oysters Planted by Virginia Aquaculturists (2005-2007)

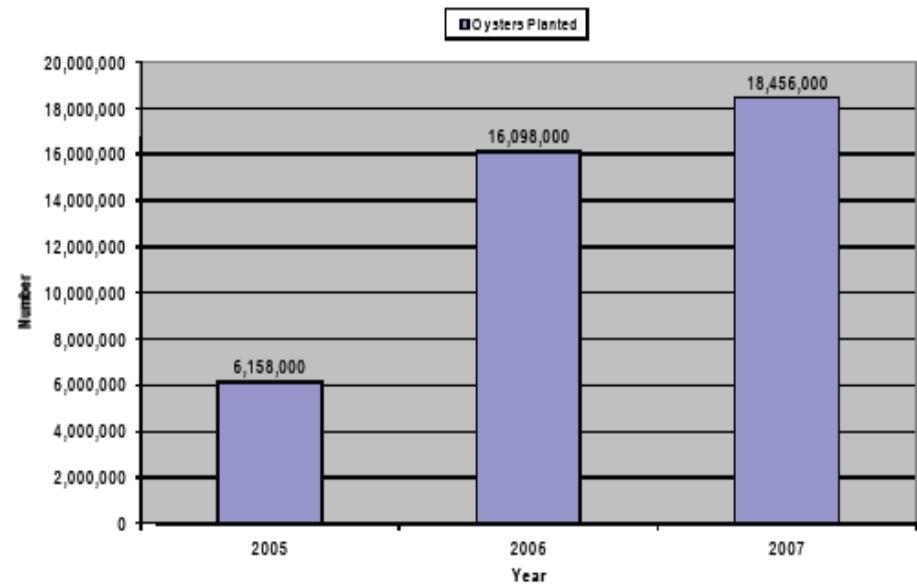
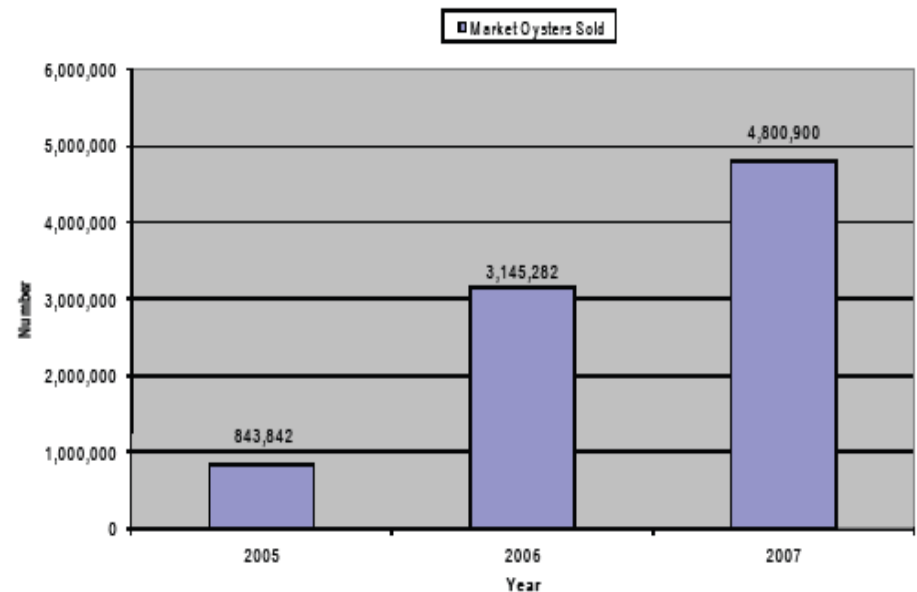


Figure 7: Number of Aquacultured Market Oysters Sold by Virginia Growers (2005-2007)



North Carolina

- A few small oyster growers
 - 1.2 M oysters reported (2005) \$310,000
 - Most oysters go to shucked meat market
- 6.5 M clams from culture
- Declining water quality from coastal development

South Carolina

- 43 clam leases
 - \$1.4 Million
 - Marketing issues
- 3 oyster leases
 - overset issues
- Experimenting with intensive oyster culture of singles for raw bar trade



Georgia

- About 11 clam farmers
- Wild and cultured clams not reported separately
- Overset of oysters a major impediment to intensive oyster culture
- Oysters and clams the only two fisheries with increased landings in the past decade

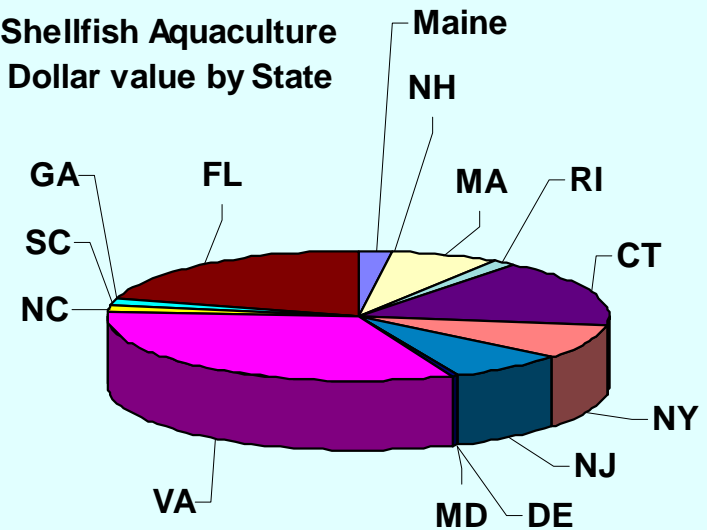
Florida (2007)

- 153 growers produced 185 M clams \$19 M
 - (\$18M in 2001, down to \$10.7M in 2005)
 - Hurricanes and red tides (Indian River)
- Industry consolidating around Cedar Key
- Market competition continues to hurt prices

Overall

- Costs all increased
- Market got tighter, especially Aug-Dec.
- New England oyster production growing
- Potential oyster production in South Atlantic: GA, SC, NC, VA and MD
- Virginia poised to increase its regional dominance in shellfish aquaculture by expanding into oysters

Shellfish Aquaculture
Dollar value by State



Industry Organization

- Dominance of industry by small firms who are unable to market products except locally
- Potential scenario for agricultural overproduction (eg. Salmon, tilapia, clams)
- Few functional state associations (Maine, Mass, RI and FL are exceptions)
- Poor cohesion and weak politically on the local level
- Generally good extension assistance

East Coast Shellfish Growers Association



- Representing hundreds of small growers from Maine to Florida
- Works on national issues with National Fisheries Institute, PCSGA and Gulf Oyster Industry Council
- Created the East Coast Shellfish Research Institute - \$720,000 in earmarks 2008
 - Dredge impacts, heavy metals, Dev. a rapid test for V.p.
- Active LISTSERV discussion group
- www.ECSGA.org

ECSGA Marketing Initiatives

NSA Oyster Tasting
Romancing the Clam
Will be looking for a
marketing earmark in
FY 09

Walk the Hill – DC
The World is Your
Oyster Congressional
Reception, Jan. 25-28

Please save Monday, 23 March 2009 for ...



Romancing the Clam

*A once in a lifetime opportunity
to experience regional clam dishes like never before.*

*Join us as celebrity chefs from around the country prepare
their local clams and favorite recipes.*

*Romancing the Clam will be held at
Bryson Hall in Savannah, Georgia on
Monday, 23 March 2009*

*For more information contact Cassy Davis at
(912) 598-2348 or Cassy.Davis@skio.usg.edu*