



November 1, 2022

Dear Maryland Shellfish Grower,

Despite the various ecological and market challenges our industry has faced over the last 4+ years, Maryland aquaculture has shown tremendous resilience and perseverance. I was exciting to share this past spring that 2021 farm-raised shellfish harvest totals were our highest yet of the “modern” program era, topping 90,000 bushels. Though likely due in part to farms offloading their 2020 surplus, as well as some pent up market demand, I am equally encouraged that all signs point to an equally strong 2022 harvest. The industry you have built is truly paying dividends to both our economy and the environment!

To that end, annual comprehensive reports documenting our production and economic trends are so important for creating outreach and training programs tailored to support specific industry needs as they evolve over time. The data are also critical for documenting the strength and importance of Maryland aquaculture to our State’s economy for State officials, funding organizations and other partner agencies that contribute staff time and resources to support industry needs. **You and your business are important to us, and we want to ensure that your needs are being met to the greatest extent possible.**

In 2023, the Department of Natural Resources and University of Maryland Extension will produce a Maryland Aquaculture Industry Status Report. We want to showcase the great progress that has been made by you and other growers against previously reported benchmarks, particularly in the face of tremendous obstacles, and continue to report industry trends that can help promote shellfish aquaculture in the years to come. To gather the necessary data, I am enclosing a **2022 Aquaculture Industry Status Report Survey** that asks for information not being obtained through other reports. We request that each primary leaseholder please take a few minutes to complete only one survey and combine data from all of the leases managed by you, in your business name or those held by immediate family members. Not all questions apply to every operation, so please skip those or mark them as “Not Applicable or N/A”.

The information collected from these surveys will be used to generate statistics and general conclusions about the shellfish aquaculture industry. **No individual or business will be identified in the Industry Status Report** and information will not be reported in a manner that would allow someone to identify any individual or businesses. Additionally, confidential commercial financial information is always protected from disclosure under Maryland law. Thank you for your assistance and contribution to this important effort.

If you have any questions about the survey, please contact Samantha Pellegrini at (410) 260-8648 or [samantha.pellegrini@maryland.gov](mailto:samantha.pellegrini@maryland.gov).

Sincerely,

A handwritten signature in black ink that reads "Rebecca M. Thurman".

Aquaculture and Industry Enhancement Division  
Fishing and Boating Services



## MARYLAND 2022 SHELLFISH AQUACULTURE INDUSTRY STATUS REPORT SURVEY

Please complete the following information about your aquaculture operation. This contact information will not be included or published as part of the industry status report. However, the Department of Natural Resources and the University of Maryland Extension offices maintain directories of shellfish growers, nursery operators, hatcheries, and equipment suppliers in Maryland, and the contact information may be included in marketing publications and/or listed on [marylandseafood.org](http://marylandseafood.org).

### **Contact Information: How do customers learn about your operation?**

Company Name: \_\_\_\_\_

Principal Sales/Marketing Contact: \_\_\_\_\_

Operation Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Company Website: \_\_\_\_\_

Social Media: \_\_\_\_\_

Check here if you do NOT want your information to be included in these resources. You can request to be removed from future publications by contacting the Aquaculture Division at [aquaculture.dnr@maryland.gov](mailto:aquaculture.dnr@maryland.gov).

### **Products and Services: What products or services do you provide?**

Market Shellfish Production:	<u>Oysters</u>	<u>Clams</u>	<u>Other (Please List)</u>
Year Round:	Yes / No	Yes / No	Yes _____
Seasonal:	Yes / No	Yes / No	Yes _____
Wholesale:	Yes / No	Yes / No	Yes _____
Retail:	Yes / No	Yes / No	Yes _____
Nursery Production:	Yes / No	Yes / No	Yes _____
Hatchery Production:	Yes / No	Yes / No	Yes _____

Do you **manufacture** aquaculture equipment or gear for sale: Yes  No

Please list: \_\_\_\_\_

Do you produce other specialty products or provide other services (i.e., tools, rigging, transport services, authorized gear retailer, etc.) that you would like listed: Yes  No

Please list: \_\_\_\_\_

\_\_\_\_\_

**General Information: Tell us a little bit more about your operation.**

Number of unique brands under which you sell product: \_\_\_\_\_

Name(s) of brand(s): \_\_\_\_\_

Are you certified by the Maryland Department of Health as a shellfish dealer? Yes  No   
If yes, what is your certification number? \_\_\_\_\_

While acting as a **harvester**, did you ice shellfish product on a vessel this year? Yes  No   
If yes, in which month(s) did you ice product on your vessel? \_\_\_\_\_

Have you ever participated in a MARBIDCO or NRCS/USDA funding program? Yes  No

If so, which program(s)? \_\_\_\_\_

How was the funding utilized? Please check all that apply and provide any relevant details:

- Remote setting: \_\_\_\_\_
- Shellfish (seed, larvae, or spat-on-shell): \_\_\_\_\_
- Shell: \_\_\_\_\_
- Equipment: \_\_\_\_\_
- Other: \_\_\_\_\_

Did you participate in any shellfish aquaculture-related training opportunities or educational programs offered this year? Yes  No  If so, which course/seminar(s)? \_\_\_\_\_

\*For more information on upcoming training opportunities please visit <https://extension.umd.edu/programs/agriculture-food-systems/program-areas/animal-science/aquaculture/educational-programs> or <https://www.facebook.com/marylandaquaculture/>

Do you purchase shellfish crop insurance? (This is different from the water column insurance required by the state) Yes  No

If no, would you be interested in shellfish crop insurance in the future? Yes  No

**Leases: What leases are part of your operation?**

- ◆ This information will be used to compile associated acreage, harvest, and planting data that is reported in monthly harvest and annual planting reports.
- ◆ If you have a cooperative agreement with another leaseholder or company, please make sure that the data about those leases is recorded on ONLY one survey.

List all of the leases associated with you or your business: (attach a separate sheet if needed)


Do you have a cooperative agreement with another producer? Yes  No

If yes, what leases are involved in that agreement? \_\_\_\_\_

Are the data from these leases included in this survey? Yes  No

### **Industry Growth: Shellfish Production Information**



**OYSTERS** – If you cultured oysters in 2022, please complete this section:

#### Shell

Did you purchase shell for remote setting of oysters or bottom stabilization? Yes  No

If yes, how many bushels were purchased: In state? \_\_\_\_\_ bu Out of state? \_\_\_\_\_ bu

Type(s):  oyster shell  clam shell  mixed shell

#### Spat-on-Shell Oyster Production

Did you utilize a remote setting facility to produce spat-on-shell oysters? Yes  No

Type(s):  used own facility  used remote setting training program facility

used other individual's facility (name) \_\_\_\_\_

For the purpose of remote setting spat-on-shell, how much **eyed larvae** did you:

Purchase in total? Diploid: \_\_\_\_\_ mil Triploid: \_\_\_\_\_ mil

Purchase in state? Diploid: \_\_\_\_\_ mil Triploid: \_\_\_\_\_ mil

Purchase out of state? Diploid: \_\_\_\_\_ mil Triploid: \_\_\_\_\_ mil

Self-produce? Diploid: \_\_\_\_\_ mil Triploid: \_\_\_\_\_ mil

Number of bushels of **spat-on-shell produced** (set by you):

In total? Diploid: \_\_\_\_\_ bu Triploid: \_\_\_\_\_ bu

Sold in-state? Diploid: \_\_\_\_\_ bu Triploid: \_\_\_\_\_ bu

Sold out-of-state? Diploid: \_\_\_\_\_ bu Triploid: \_\_\_\_\_ bu

Planted on your lease(s)? Diploid: \_\_\_\_\_ bu Triploid: \_\_\_\_\_ bu

Average price of spat-on-shell sold by you? (per bushel) \$ \_\_\_\_\_

Number of bushels of **spat-on-shell purchased** (set by someone else):

In total? Diploid: \_\_\_\_\_ bu Triploid: \_\_\_\_\_ bu

Purchased in-state? Diploid: \_\_\_\_\_ bu Triploid: \_\_\_\_\_ bu

Purchased out-of-state? Diploid: \_\_\_\_\_ bu Triploid: \_\_\_\_\_ bu

#### Cultchless Oyster Production (Individual oysters)

Did you utilize a shellfish nursery facility to produce cultchless oyster seed? Yes  No

Type(s):  land-based  on-pier/wharf  in-water  other \_\_\_\_\_

used other individual's facility (name/type) \_\_\_\_\_

For the purpose of cultchless oyster seed production, how much **eyed larvae** did you:

Purchase in total? Diploid: \_\_\_\_\_ mil Triploid: \_\_\_\_\_ mil

Purchase in state? Diploid: \_\_\_\_\_ mil Triploid: \_\_\_\_\_ mil

Purchase out of state? Diploid: \_\_\_\_\_ mil Triploid: \_\_\_\_\_ mil

Self-produce? Diploid: \_\_\_\_\_ mil Triploid: \_\_\_\_\_ mil

Number of individual **cultchless oyster seed** produced by you:

In total?	Diploid: _____ mil	Triploid: _____ mil
Sold in-state?	Diploid: _____ mil	Triploid: _____ mil
Sold out-of-state?	Diploid: _____ mil	Triploid: _____ mil
Planted on your lease(s)?	Diploid: _____ mil	Triploid: _____ mil

Average price of **cultchless seed** sold by you? (per 1,000) \$ \_\_\_\_\_

Number of **cultchless oyster seed (≤ 1")** purchased from someone else:

In total?	Diploid: _____ mil	Triploid: _____ mil
Purchased in-state?	Diploid: _____ mil	Triploid: _____ mil
Purchased out-of-state?	Diploid: _____ mil	Triploid: _____ mil

Did you purchase undersize or market-sized oysters (>1") for resale? Yes  No   
 Farm-raised       Wild caught

Does your operation utilize wet storage of market-sized oysters? Yes  No



**CLAMS** – If you cultured clams in 2022, please complete this section:

Did you utilize a shellfish nursery facility to produce seed clams? Yes  No

Nursery Type(s):  land-based     on-pier/wharf     in-water     other \_\_\_\_\_  
 used other individual's facility (name/type) \_\_\_\_\_

For the purpose of producing seed clams, how much **larvae** did you:

Purchase in total?	Hard clam: _____ mil	Soft clam: _____ mil
Purchase in state?	Hard clam: _____ mil	Soft clam: _____ mil
Purchase out of state?	Hard clam: _____ mil	Soft clam: _____ mil
Self-produce?	Hard clam: _____ mil	Soft clam: _____ mil

Number of individual **seed clams** produced by you:

In total?	Hard clam: _____ indiv.	Soft clam: _____ indiv.
Sold in-state?	Hard clam: _____ indiv.	Soft clam: _____ indiv.
Sold out-of-state?	Hard clam: _____ indiv.	Soft clam: _____ indiv.
Planted on your lease(s)?	Hard clam: _____ indiv.	Soft clam: _____ indiv.

Average price of seed clams sold by you? (per 1,000) \$ \_\_\_\_\_

Number of individual **seed clams** purchased from someone else:

In total?	Hard clam: _____ indiv.	Soft clam: _____ indiv.
Purchased in-state?	Hard clam: _____ indiv.	Soft clam: _____ indiv.
Purchased out-of-state?	Hard clam: _____ indiv.	Soft clam: _____ indiv.

Did you resell any of the seed clams that you purchased? Yes  No

Resold in total?	Hard clam: _____ indiv.	Soft clam: _____ indiv.
Resold in-state?	Hard clam: _____ indiv.	Soft clam: _____ indiv.
Resold out-of-state?	Hard clam: _____ indiv.	Soft clam: _____ indiv.

Please list similar or attach production/purchase/sales information for other species below:

**Economics: Jobs creation and sales information**

Please complete the table below to show the number of people you employ:

Employees	Year Round	Seasonal	How many of these are TFL Holders?
Full Time			
Part-Time			

Do you expect to hire additional staff (full or part time) in 2023? Yes  No

If yes, how many employees do you intend to hire? \_\_\_\_\_ full time \_\_\_\_\_ part-time



Please complete the applicable tables below to summarize your product sales.



Retail - sales to the public or restaurants Wholesale –sales to a shellfish dealer

**OYSTERS (bu):**

Market Type	Total <u>Bushels</u> Market Oysters Sold	<u>Bushels</u> Sold In-State	<u>Bushels</u> Sold Out-of-State	Average Price Per <u>Bushel</u> Market Oysters
Wholesale				
Retail				

**OYSTERS (per piece):**

Market Type	Total <u>Individual</u> Market Oysters Sold	<u>Individuals</u> Sold In-State	<u>Individuals</u> Sold Out-of-State	Average Price Per <u>Single</u> Market Oyster
Wholesale				
Retail				

**CLAMS (please note species):**

Market Type	Total <u>Individual</u> Market Clams Sold	<u>Individuals</u> Sold In-State	<u>Individuals</u> Sold Out-of-State	Average Price Per Market Clam
Wholesale				
Retail				

**BAY SCALLOPS:**

Market Type	Total <u>Individual</u> Market Scallops Sold	<u>Individuals</u> Sold In-State	<u>Individuals</u> Sold Out-of-State	Average Price Per Market Scallop
Wholesale				
Retail				

What was the overall estimated investment in your shellfish aquaculture operation during 2022?

Clam Larvae/Seed	\$ _____	Labor	\$ _____
Oyster Larvae/Seed	\$ _____	Marketing	\$ _____
Other Species Seed	\$ _____	Fuel	\$ _____
Nursery Operations	\$ _____	Vessels	\$ _____
Equipment	\$ _____	Lease Rent	\$ _____
Shell/Spat-on-Shell	\$ _____	Other	\$ _____

What was the total value of your business in 2022? \$ \_\_\_\_\_

**General Information/Comments: Is there anything else we should know?**

What would you change about the way the shellfish aquaculture industry is managed in Maryland in order to help make your business more successful?

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Please provide us with constructive examples of what can be considered to facilitate these changes (i.e., regulatory/policy changes, new funding opportunities, different outreach, etc.)?

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If available, would you use an online platform to submit aquaculture forms? \_\_\_\_\_

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If available, would you use an online platform to submit rent or fee payments? \_\_\_\_\_

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What would help to increase your interest in participating in the Maryland Agricultural and Resource-Based Industry Development Corporation (MARBIDCO) shellfish aquaculture loan programs in order to receive funding for your shellfish business? \_\_\_\_\_

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Are you a member of a local/regional shellfish growers association? Yes  No

If so, please provide name(s): \_\_\_\_\_

Have you ever attended an Aquaculture Coordinating Council (ACC) Meeting? Yes  No

Would you like to be added to the ACC meeting email distribution list? Yes  No

\*If yes, please ensure you provided an email address on page one

**Thank you for taking the time to complete this important survey!**