

Delaware Shellfish Aquaculture 2025 Report

DNREC Division of Fish and Wildlife

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Delaware Department of Natural Resources and Environmental Control Division of Fish & Wildlife
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Delaware's Inland Bays

Rehoboth Bay, Indian River Bay, and Little Assawoman Bay collectively are referred to as Delaware's Inland Bays (Figure 1). These three bays and their tributaries cover about 32 square miles of southeastern Delaware. The Inland Bays host a variety of activities including recreational and commercial fishing, recreational boating and water sports, bird watching, and kayaking. Located in Sussex County, the land surrounding the Inland Bays is densely populated. According to USAfacts.org, from the first Inland Bays shellfish aquaculture lease issuance in 2017 through 2025, the population of Sussex County grew by 23.3%. The Inland Bays are estuaries, or partially enclosed water bodies where freshwater mixes with ocean water. Rehoboth Bay and Indian River Bay share a tidal connection with the Atlantic Ocean via the Indian River Inlet. Little Assawoman Bay, the southernmost of the Inland Bays, receives tidal exchange from its connection to Ocean City Inlet.

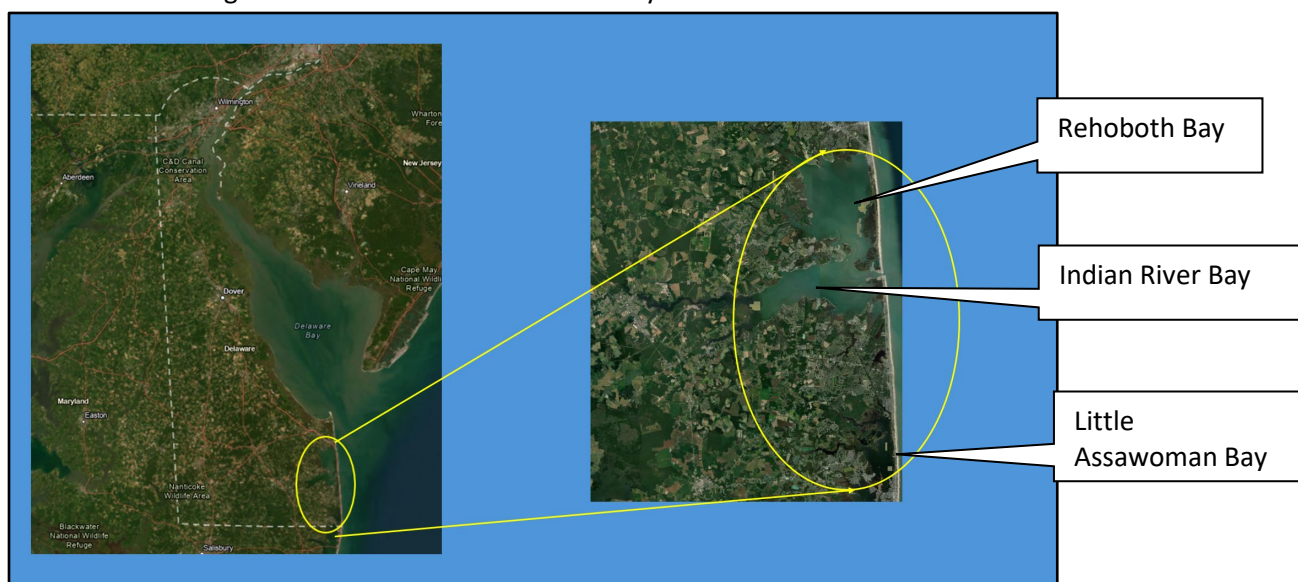


Figure 1. The location of Delaware's Inland Bays. The three bays are in Sussex County, Delaware. Little Assawoman Bay is connected to Assawoman Bay in Maryland.

Rehoboth Bay

All acres save one of the Inland Bays' shellfish aquaculture leases in 2025 were in the Rehoboth Bay. Rehoboth Bay is a shallow water body characterized by high estuarine salinity, warm summer temperatures, and typically moderate winter temperatures, although occasional winter freezes have been recorded. The Delaware Department of Natural Resources and Environmental Control (DNREC) Division of Water has sampled water parameters (dissolved oxygen, water temperature, pH, salinity, nitrogen, total suspended solids, phosphorus, enterococci, Chlorophyll a) for several years at the Buoy 7 (STORET 306091) sampling station in Rehoboth Bay. The Buoy 7 sampling station is located between the three Shellfish Aquaculture Development Areas (SADA) in Rehoboth Bay (Figure 2). The SADAs in Rehoboth Bay are within a mile and a half of each other. The period of record for salinity and temperature at this station runs from March 2000 through May 2025. Water samples have been sampled discretely, with one sample taken per month during months sampled. Number of months and

which months sampled per year have varied during the recorded period. The long-term record for salinity measured at this station has an average low of 27.1 ppt to an average high of 30 ppt. The average range of temperature is 6.0° C (42.8° F) to 26.3° C (79.34° F) over the same 2000-2025 period.



Figure 2. The location of the Buoy 7 sampling station in Rehoboth Bay relative to the boundaries of the Shellfish Aquaculture Development Areas. Information on samples collected from Buoy 7 and other stations is available at the [Delaware Water Quality Portal](#).

Indian River Bay

Indian River Bay is also shallow with high estuarine salinity, warm summer temperatures, and moderate winter temperatures. One acre of one lease was located in Indian River Bay during 2025. The period of record for salinity and temperature at this station runs May 2017 through February 2020. Water samples have been sampled discretely, with one sample taken during months sampled. Number of months and which months sampled per year varied during the recorded period. The salinity measured at this station averaged 17.0 ppt to 26.4 ppt. The average range of temperature was 8.0° C (46.4° F) to 26.6° C (79.88° F) over the same 2017-2020 period.



Figure 3. The location of the Oak Orchard sampling station (in white) in Indian River Bay relative to the boundaries of the IR-A Shellfish Aquaculture Development Area (in yellow).

Recent History of Inland Bays' Shellfish Aquaculture

Publicly-Shared Information

Shellfish aquaculture in Delaware's Inland Bays is administered by Delaware's Department of Natural Resources and Environmental Control (DNREC), Division of Fish & Wildlife (DFW). The first subaqueous land lease was issued in December 2017. Additional leases were issued in the years that followed. The first oysters were harvested from the Inland Bays shellfish aquaculture leases in fall of 2018. Lessees submit monthly planting and harvest reports, or null reports, to DNREC DFW. When reporting commercial shellfish aquaculture statistics, DNREC DFW abides by the "rule of three," meaning that if there are fewer than three lessees reporting harvest or planting, the collective information will not be publicly distributed in order to protect the confidentiality and private business information of individual shellfish aquaculture participants. The "rule of three" meant that during the initial years of Inland Bays shellfish aquaculture, there were not yet enough participants to publicly share planting and harvest statistics. There have been a sufficient number of lessees reporting since August 2019 to meet the "rule of three."

2025 Inland Bays Shellfish Aquaculture Statistics

Acres:

Inland Bays' shellfish aquaculture lease applications are accepted year-round, and per Delaware Code, lessees may surrender acreage at any time during the calendar year, so there may be variability in the number of leased acres throughout the year. For the purpose of this annual report, the number of lessees and leased acres are 'captured' in December of each year. At the end of 2025, there were 27 acres leased in Delaware's Inland Bays for shellfish aquaculture, and two pending applications. All of the leased acreage was within the SADA. DNREC DFW does not limit leasing to the SADAs, but the permitting process is expedited for applicants in those areas.

Number of leases:

There were 13 leases (11 lessees) in the Inland Bays at the end of calendar year 2025. Twelve of those leases held commercial leases and one lease was a scientific lease.

Shellfish aquaculture

Of the 12 commercial leases (ten lessees), all of the active leases raised eastern oyster (*Crassostrea virginica*) in Delaware's Inland Bays in 2025. Small trials of surf clam (*Spisula solidissima*) and hard clam (*Mercenaria mercenaria*) were also planted.

Planting

In calendar year 2025, there were 1,066,290 oysters commercially planted on shellfish aquaculture leases in the Inland Bays. This was a decrease of 148,710 total oysters from the 2024 commercial planting (Figure 4). On an oysters-to-acres-leased basis, the average number of oysters planted per commercially-leased acre in 2024 was 52,826 and this declined to an average of 41,011 planted per commercially-leased acre in 2025.

All oysters grown were placed in containers. Lessees reported using a variety of gear types for oyster culture, including floating bags/baskets, floating cages, and bottom cages.

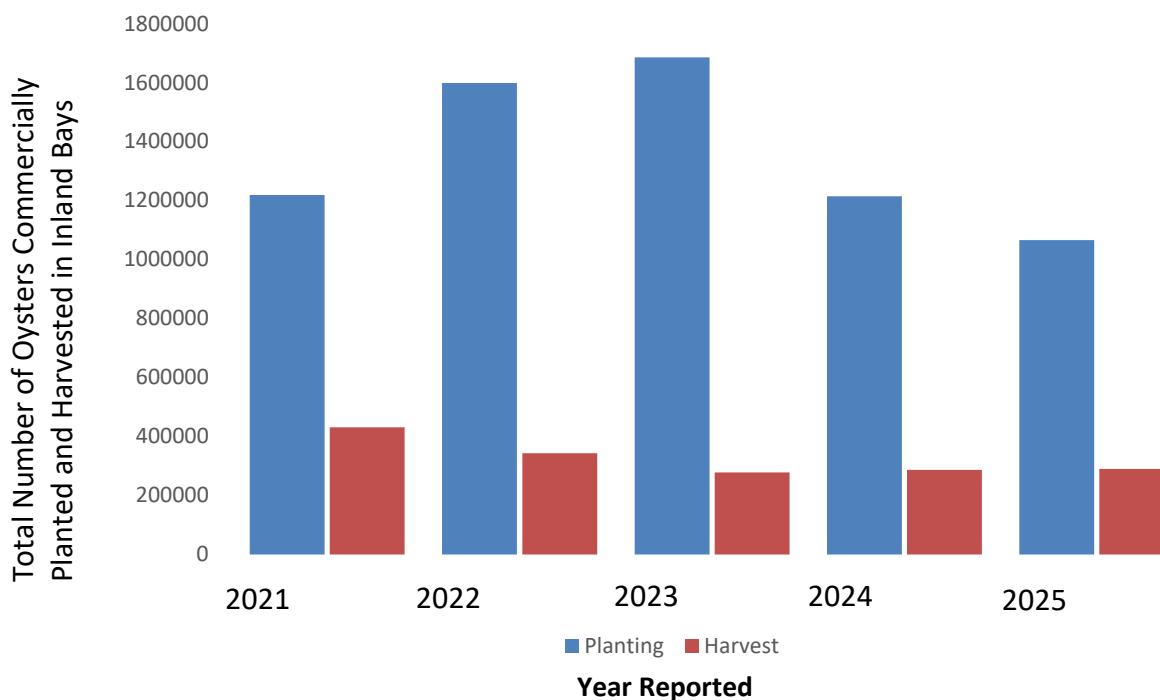


Figure 4. Inland Bays shellfish aquaculture reported planting and harvest totals for 2021, 2022, 2023, 2024, and 2025.

Harvest

The total number of oysters reported harvested in calendar year 2025 was 290,249—a slight increase of 3,106 oysters from the total number of oysters reported harvested in 2024 (Table 1). The number of oysters harvested per commercial acre leased in 2025 (11,163) decreased from the previous year (12,484). The harvest per month varied (Figure 5, Table 1). The early months of 2025 recorded low harvests, and peaked in July before descending through September, with another increase at the end of the year.

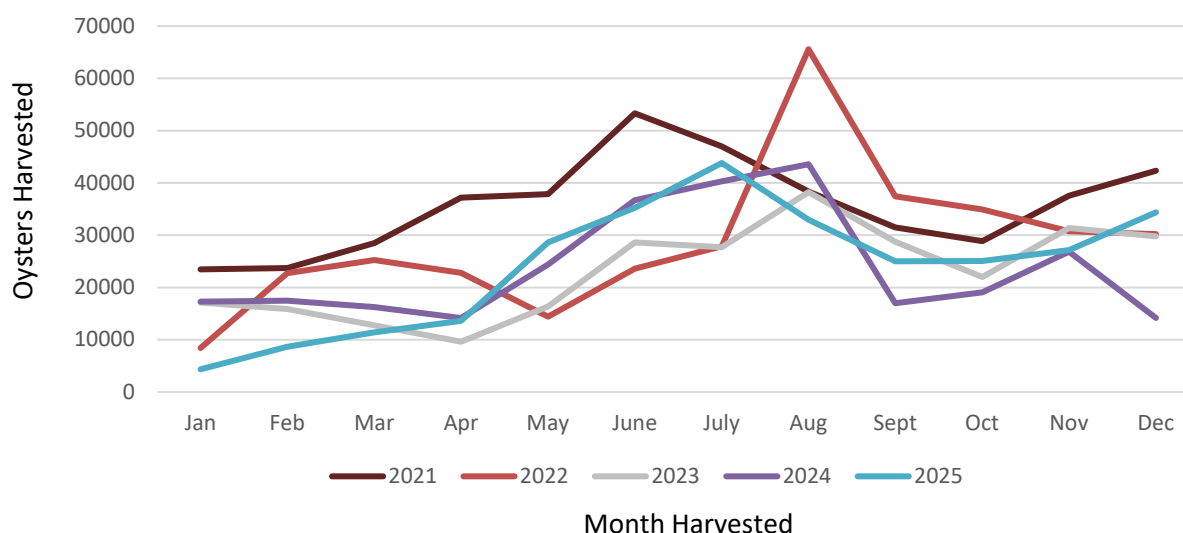


Figure 5. Inland Bays shellfish aquaculture reported monthly harvest totals for 2021-- 2025.

Table 1. Inland Bays shellfish aquaculture oysters harvested by month and yearly total for 2021-2025. The number of lessees reporting harvest each month in 2025 is also included.

Month	2021 Oyster Harvest	2022 Oyster Harvest	2023 Oyster Harvest	2024 Oyster Harvest	2025 Oyster Harvest	# Lessees harvesting 2025
January	23,461	8,410	17,084	17,269	4339	3
February	23,727	22,758	15,865	17,454	8664	4
March	28,517	25,229	12,742	16,240	11,411	5
April	37,200	22,817	9,616	14,149	13,637	6
May	37,890	14,408	16,367	24,395	28,586	8
June	55,320	23,598	28,614	36,696	35,258	7
July	47,001	27,896	27,676	40,341	43,816	7
August	38,328	65,587	38,250	43,573	32,970	8
September	31,475	37,412	28,766	16,972	25,010	5
October	28,835	34,944	22,025	19,039	25,043	8
November	37,525	30,742	31,397	26,825	27,163	8
December	42,310	30,200	29,756	14,190	34,352	8
Yearly Total	431,589	344,001	278,158	287,143	290,249	

Harvest and Sale/Donation for Inland Bays Oyster Population Enhancement

In addition to shellfish harvested for commercial purposes, lessees in the Inland Bays also reported sales and donations of sub-market size oysters to the Center for the Inland Bays, which were used to stock their man-made oyster reef projects in the Inland Bays. In addition to the reported commercial harvest, there were 65,300 oysters that were donated or sold to the Center for the purpose of oyster population enhancement in 2025.

Price

The 2025 dockside price per oyster varied throughout the year (Table 2). The 2025 range of \$0.75 between minimum and maximum ex-vessel price reported was more narrow than previous year's range of \$1.00 between minimum and maximum (Figure 5). The minimum dockside price in 2025 was \$0.50 and the maximum reported price was \$1.25. There was a reduction in both the minimum and maximum prices, compared to 2024 (Figure 6). The weighted average price per Inland Bays oyster in 2025 was \$0.87, a decrease of \$0.04 from the average price of 2024. The gross sales amount for 2025 was \$251,358.85. This was a decrease of \$8,325.96 from the previous year.

Please note: When price per oyster is calculated, if lessees have reported donating or gifting oysters commercially harvested, then those oysters do contribute to the total amount of oysters harvested, but gifted or donated oysters are not used in calculating average dockside price. Oysters sold within the Inland Bays for shellfish population enhancement projects are not included in price calculations for total dockside value; they are not part of the commercial sales and prices for enhancement projects are often based on grant monies available rather than prevailing market price.

Table 2. Inland Bays shellfish aquaculture oysters with weighted average dockside price paid per oyster, by month and by year for 2021-2025.

Month	2021 Oyster Price	2022 Oyster Price	2023 Oyster Price	2024 Oyster Price	2025 Oyster Price
January	\$0.61	\$0.71	\$0.79	\$0.95	\$0.73
February	\$0.63	\$0.70	\$0.75	\$0.94	\$0.90
March	\$0.71	\$0.68	\$0.77	\$0.91	\$0.93
April	\$0.67	\$0.69	\$0.81	\$0.92	\$0.91
May	\$0.69	\$0.73	\$0.89	\$0.89	\$0.87
June	\$0.73	\$0.78	\$0.79	\$0.87	\$0.82
July	\$0.69	\$0.76	\$0.83	\$0.87	\$0.90
August	\$0.73	\$0.72	\$0.82	\$0.86	\$0.90
September	\$0.76	\$0.72	\$0.81	\$0.93	\$0.87
October	\$0.75	\$0.74	\$0.94	\$0.94	\$0.86
November	\$0.75	\$0.78	\$0.97	\$0.96	\$0.83
December	\$0.74	\$0.77	\$0.94	\$0.99	\$0.85
Full Year	\$0.71	\$0.73	\$0.85	\$0.91	\$0.87

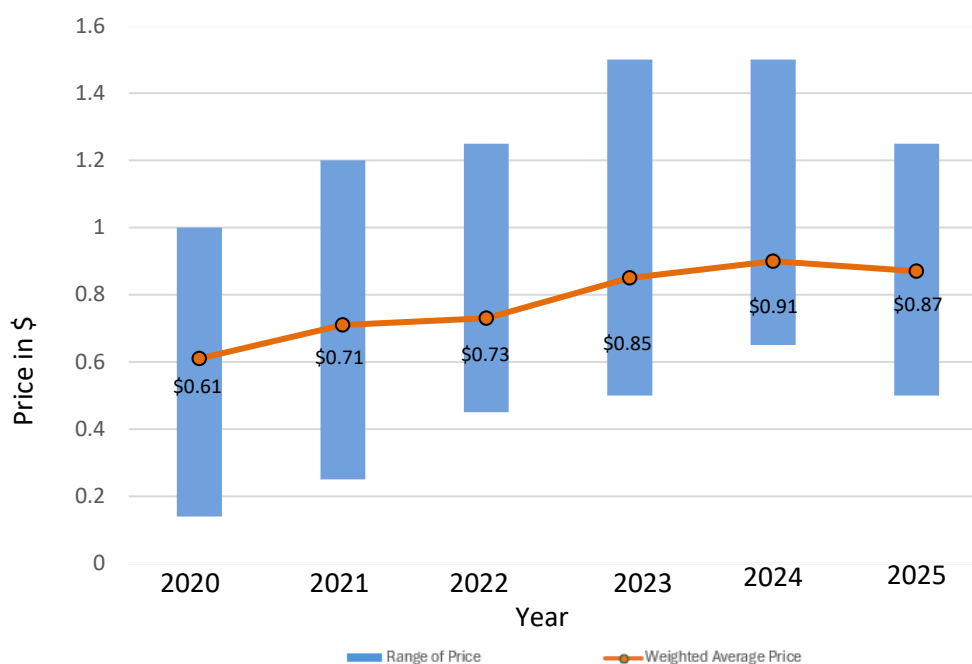


Figure 6. Inland Bays shellfish aquaculture oysters' range of reported dockside price (in USD), from minimum reported price during the year to maximum reported price, shown in blue bars. The weighted average price per oyster is shown with black-outlined dots.

Survey of Participants:

At the end of each calendar year, DNREC DFW sends commercial lessees a survey. The survey asks about number of employees or volunteer workers, hours worked on the lease, hours worked by other employees, estimates of sales markets, acres used for growing shellfish, equipment used on the lease, shellfish mortality estimates, and any reports of poaching, boating incidents, or vandalism on the lease. The information is compiled so as not to identify any single respondent.

- Work on the lease:** The total reported workers on Inland Bays leases had a shift in 2025, compared to 2024. Full-time laborers reported was down from the previous year, while part-time/volunteer/barter employees were up. The labor on the lease (including the lessees themselves), included three full-time employees, six part-time employees, three barter employees, and eight volunteers. Full time employees were those working 35-40 hours/week or more on a lease. When asked how many hours part-time or volunteer employees worked, the estimated work was 2-30 hours/week
 - The respondents indicated that spring, summer, and fall were the busiest seasons. The seasonal estimate of required work hours was the lowest during winter, at 0-12 hours/week.
- Acres used to grow shellfish:** The lessees were asked how many acres of their lease they physically used to grow shellfish in 2025, irrespective of the actual number of acres in their lease. Answers were between one and three acres used, with the average being 1.6.
- Grower sales:** Lessees were asked to estimate the percentage of total sales for oysters sold at market rate that were sent to wholesale/retail, or direct to consumer. Similar to previous years, the answers that lessees provided showed that each had a strong sales leaning in one direction or the other, and no lessee reported an even split between sales categories. The lessee answers about their individual sales routes were combined with their reported harvests to investigate sales routes for the harvest from the Inland Bays (Figure 6). Wholesale was ahead of Direct to Consumer for the largest share of sales for Inland Bays oysters sold at market rate in 2025.

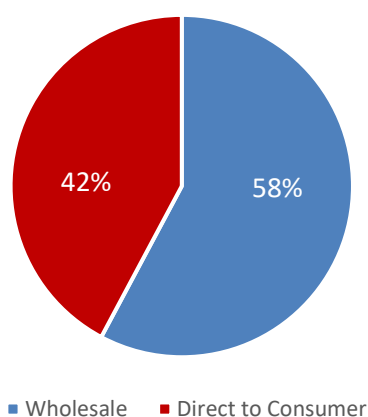


Figure 7. Sale routes for Inland Bays aquaculture harvested oysters based on quantifiable survey response answers. Inland Bays shellfish aquaculture lessees responded to “What percentage of your total shellfish harvested were sold to the following: Wholesale to dealer or retailer (not the final consumer, but expected to be sold on)? Direct to consumer?” The lessee responses were then applied to their reported harvest for the year, giving an estimate of sales routes for Inland Bays’ harvested oysters.

- **New markets:** No novel market types were identified by lessees; however, two lessees did indicate new-to-them sales venues.
- **Poaching:** There were no reported incidences of theft from a shellfish lease in 2025.
- **Boating incidents:** There were two reports of boater damage on the 2025 survey. The lessees reported boats running through the lease and damaging cages. One lessee shared that their cages, while crushed, were still useable.
- **Shellfish mortality:** Lessees reported losing an estimated 10%-85% of their crops. These losses were attributed by survey respondents to unknown, crowding of oysters, and personal reasons affecting husbandry.
- **Other notes for 2025:** Under other notes provided by survey respondents, two respondents commented that oysters were growing and thriving on their leases and that the water was beautiful and great for growing oysters.