



# U.S. Oyster Market Outlook: Trends and Opportunities

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CROWN ISLE RESORT, COURTENAY, BC

# Outline

- Regional U.S. Oyster Production
- U.S. Oyster Supply Estimate
- Oyster Markets: Restaurants
- Exports and Imports
- Expert Interview Highlights
  - Preferred Size
  - Value Added Products
  - Marketing Research
- Recommendations

**Co-authors:** Drs. Bob Rheault (ECSCGA), Matt Parker (UMD Ext) & Michael Rubino (NOAA, retired)



## U.S. Oyster Aquaculture Market Outlook

### U.S. Oyster Industry Insight (continued)

#### Siting & Regulatory Issues

Inconsistent enforcement for sanitation and harvest closures are challenges. Access to new or expanding leases for oyster farming is a significant challenge.

#### Food Safety & Press

Bad press related to consumer advisories and illnesses (i.e. "Flesh-eating bacteria," Norovirus) and harmful algal blooms pose significant threats, damaging markets for weeks or longer.

#### Marketing Needs

There is a widely recognized need for market research, targeting new consumers, sharing the "farm story," and a national marketing effort to promote a consistent message about sustainability, health, and co-benefits of aquatic farming with clean water and as habitat for marine life, including recreational and commercially important fisheries. Public education is needed to dispel myths and provide context for public concerns about oyster safety. Government investment in public education can dispel myths and improve public acceptance (e.g. social license).

#### Opportunities

Exploring international markets with government assistance. Public education and marketing that emphasizes quality, sustainability, and culinary experiences. Developing value-added products. Wet storage to manage supply and market interruptions. Genetic selection for disease resistance and production traits. Mechanization to cut production costs and labor.

#### Threats

Increasing temperatures and storm intensity and frequency all pose threats to producers. Changes in the range and severity of harmful algal blooms, predators and parasites, and declines in water quality also threaten oyster production. Pathologists continue to struggle to define the causes of periodic unexplained mortality events that can cause devastating losses.

Negative press linking oysters to illness or contaminants (i.e. microplastics, PFAS) reduce restaurant demand, despite minimal human health risk and limited evidence of risk. Economic downturns and events like the COVID-19 pandemic can decimate restaurant demand.

Declining consumer confidence and economic uncertainty have an oversized impact on demand for half-shell oysters. Increased imports from foreign countries with lower production and labor costs, and massive economies of scale or government subsidies pose a threat by undercutting U.S. prices.

May 2025



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**EAST COAST**  
SHELLFISH GROWERS  
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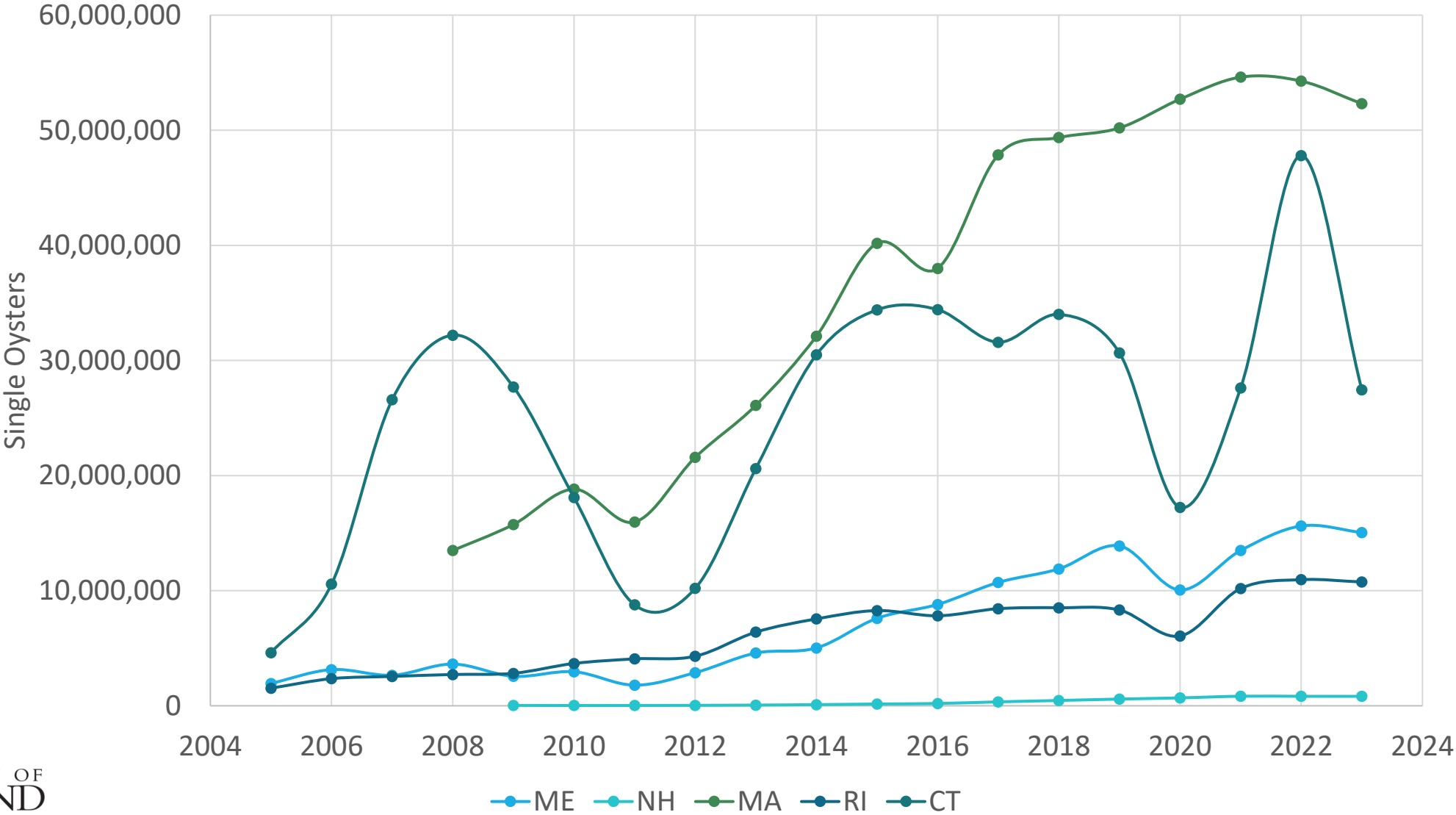


# Regional U.S. Oyster Production

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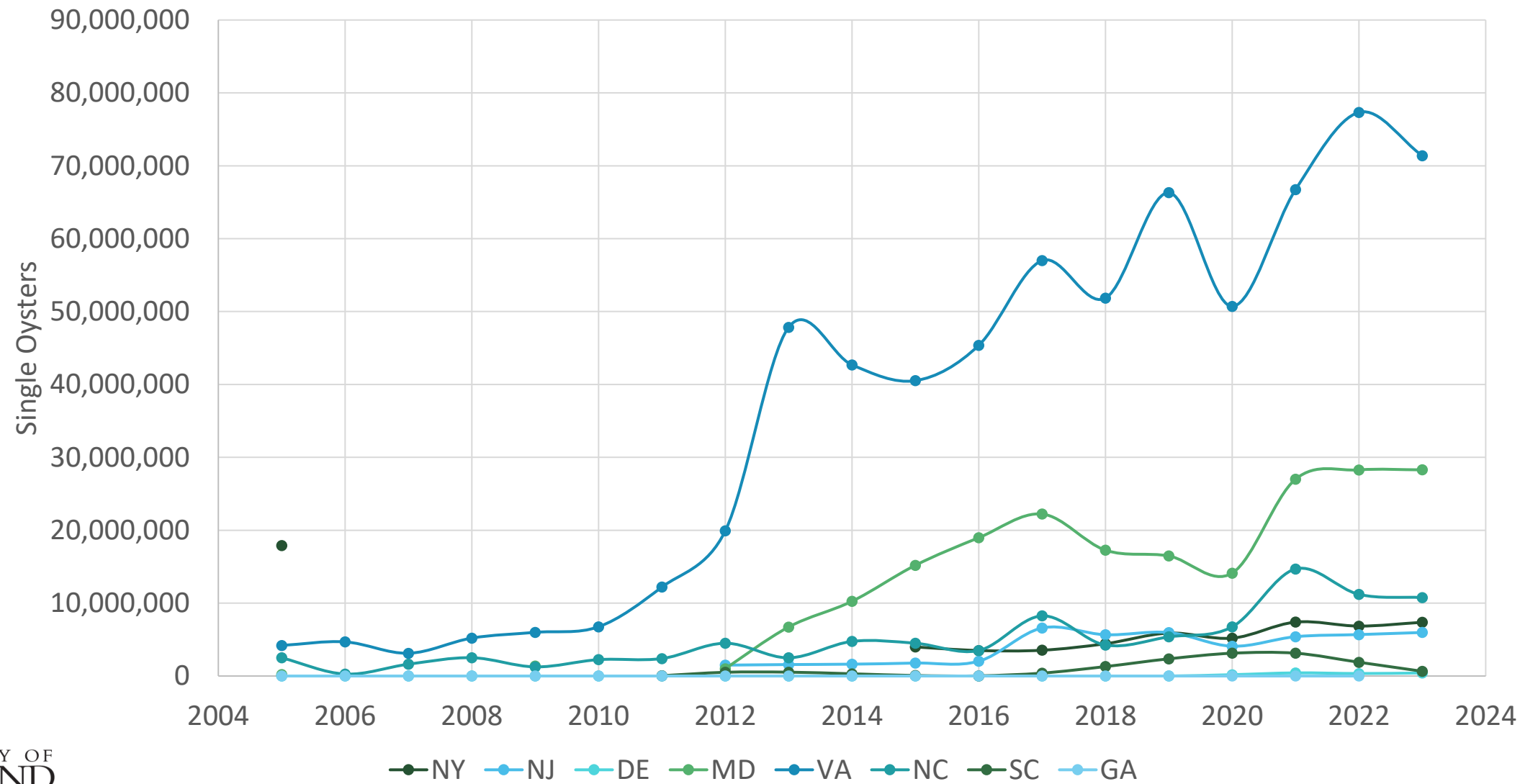


# New England



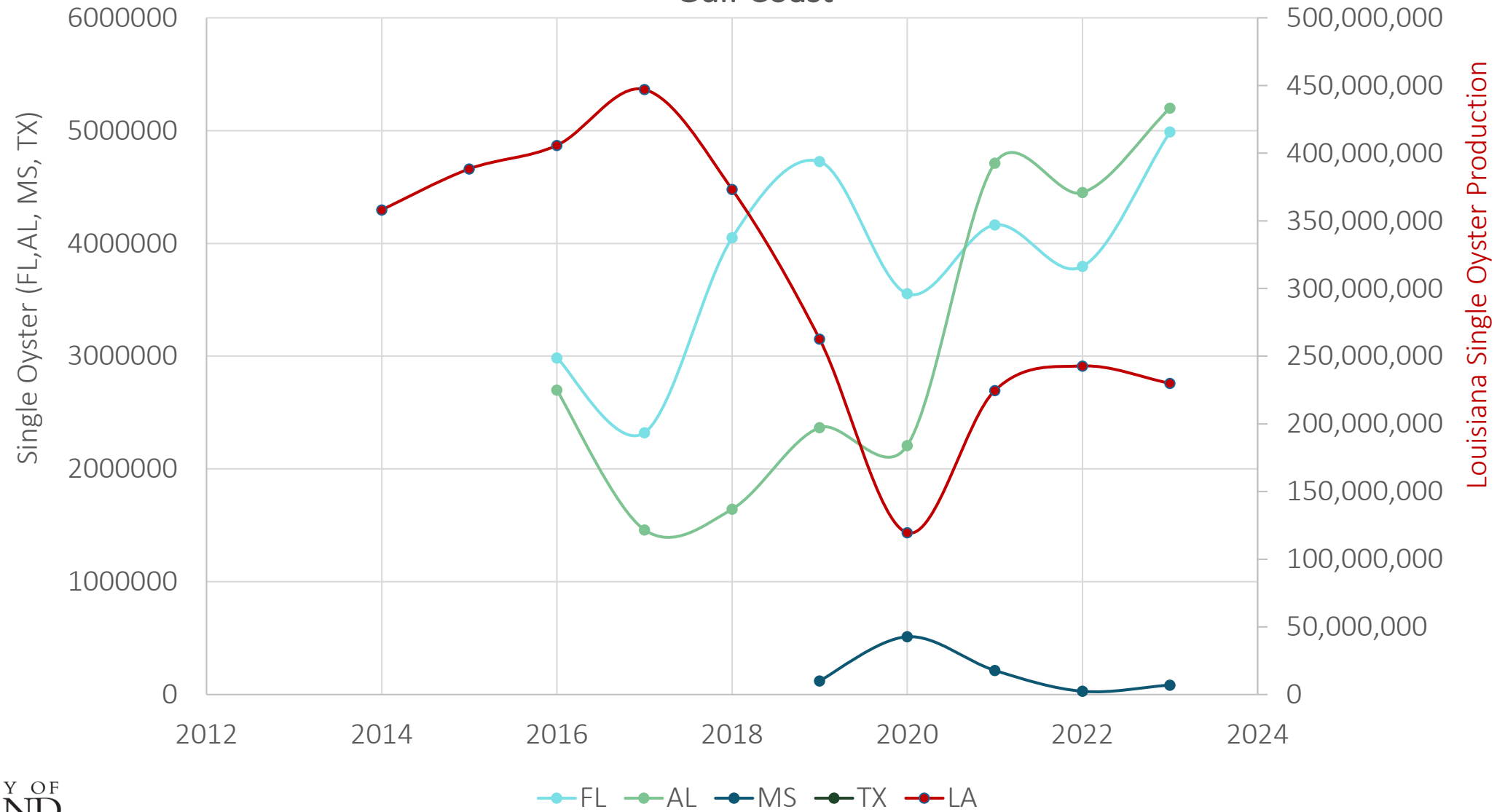


## Mid-Atlantic



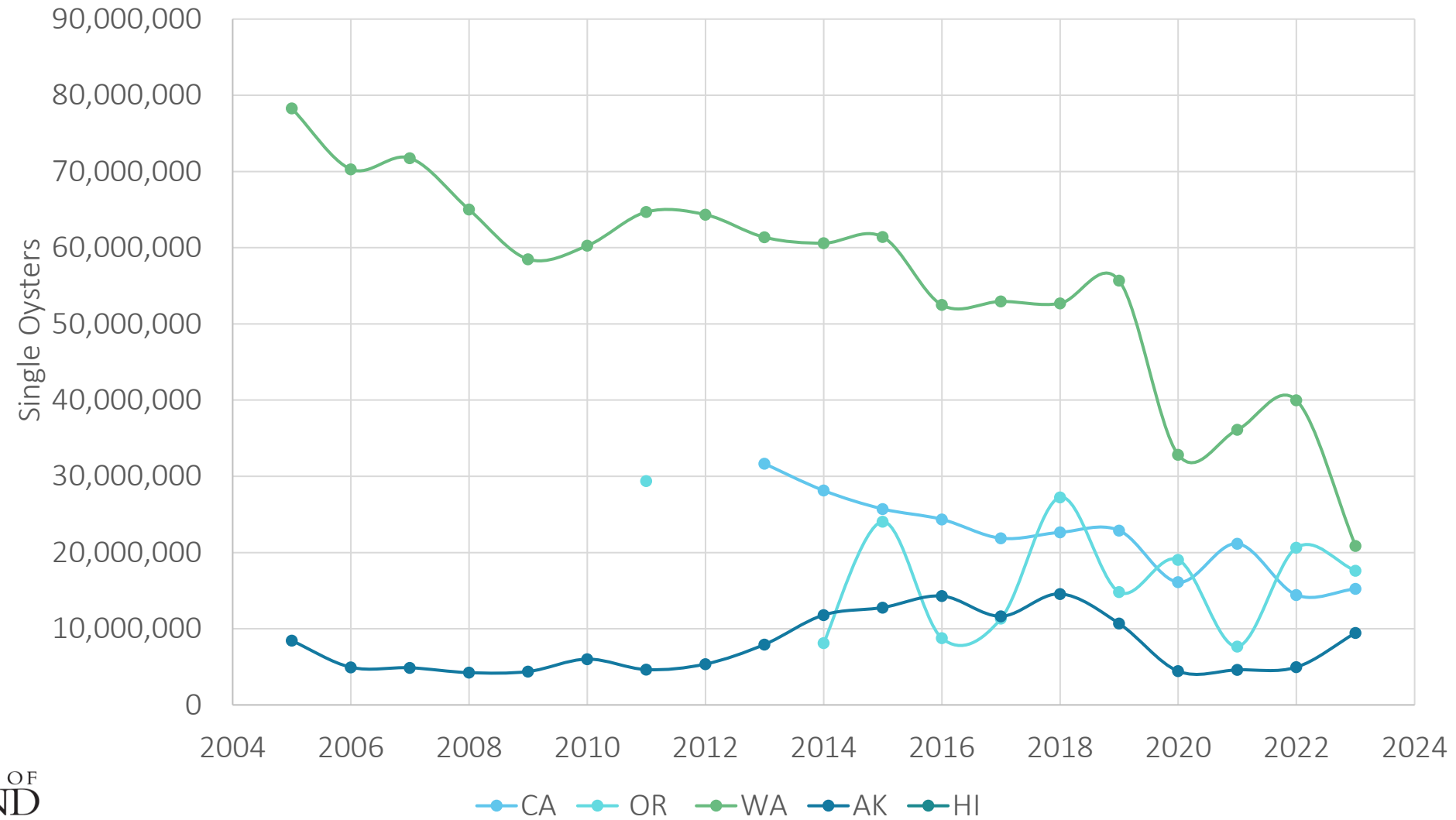


# Gulf Coast





## West Coast







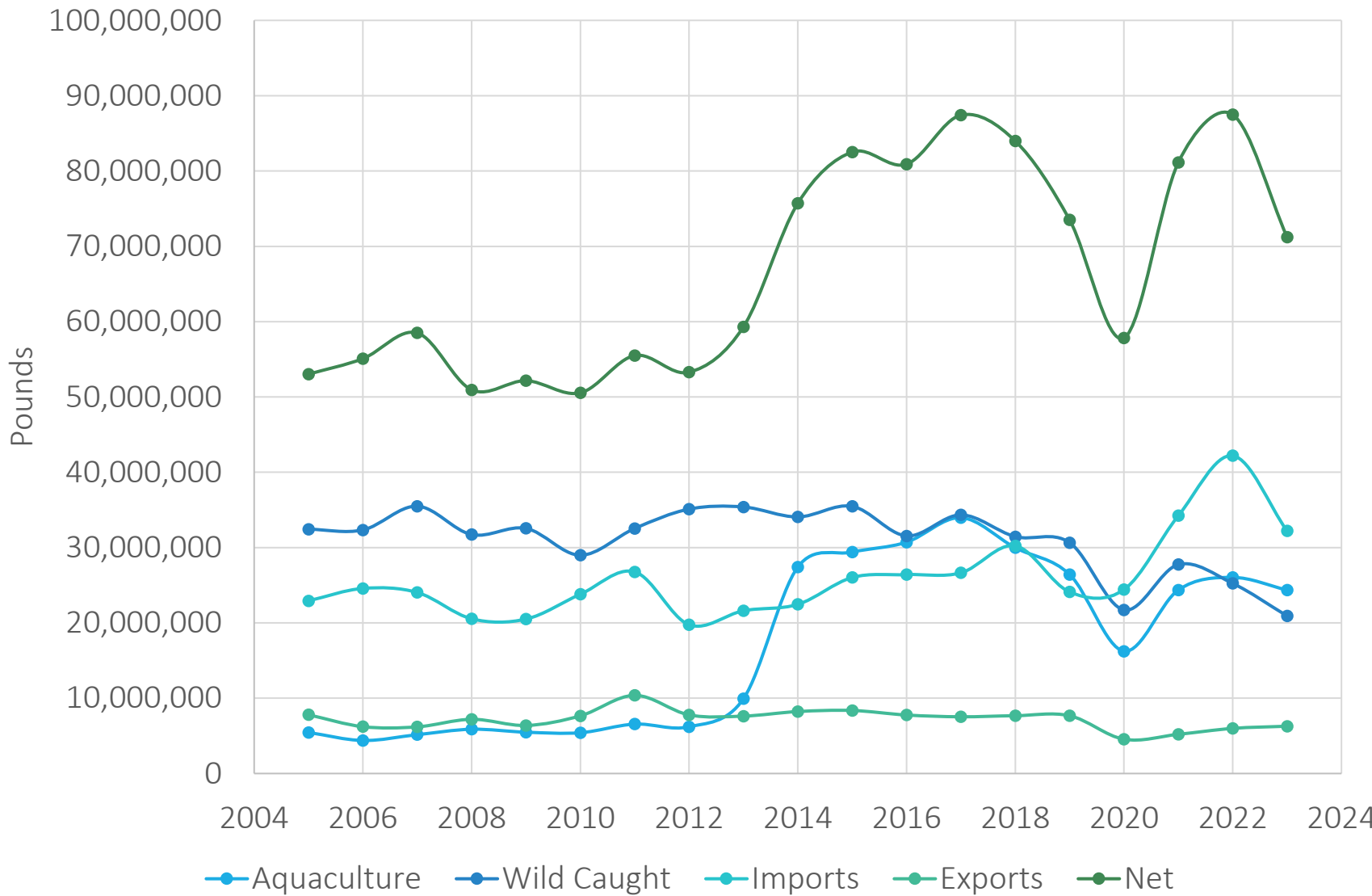
# U.S. Oyster Supply Estimate

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# U.S. Oyster Supply Estimate



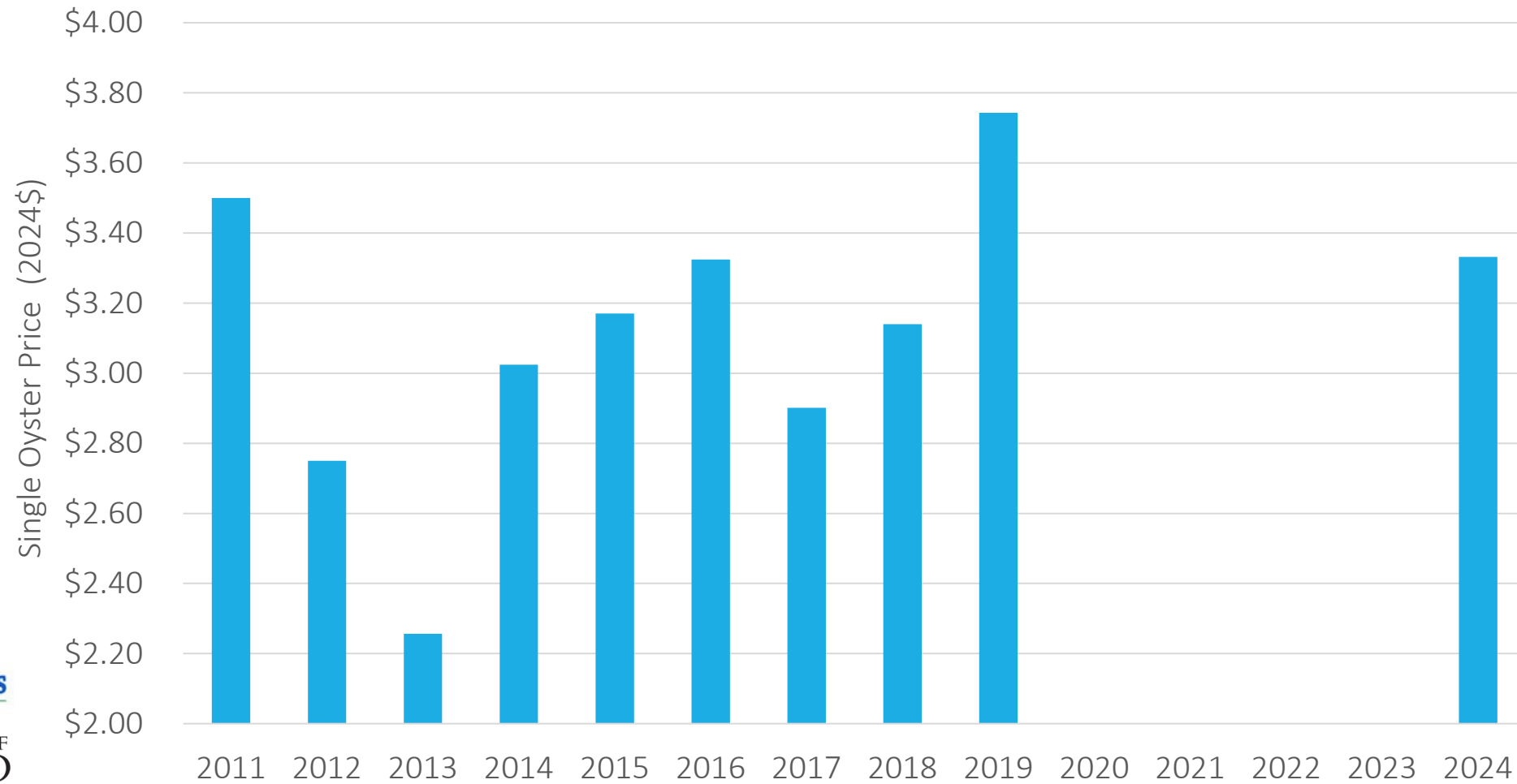


# Oyster Markets: Restaurants

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# Yearly Average Price (2024 \$)

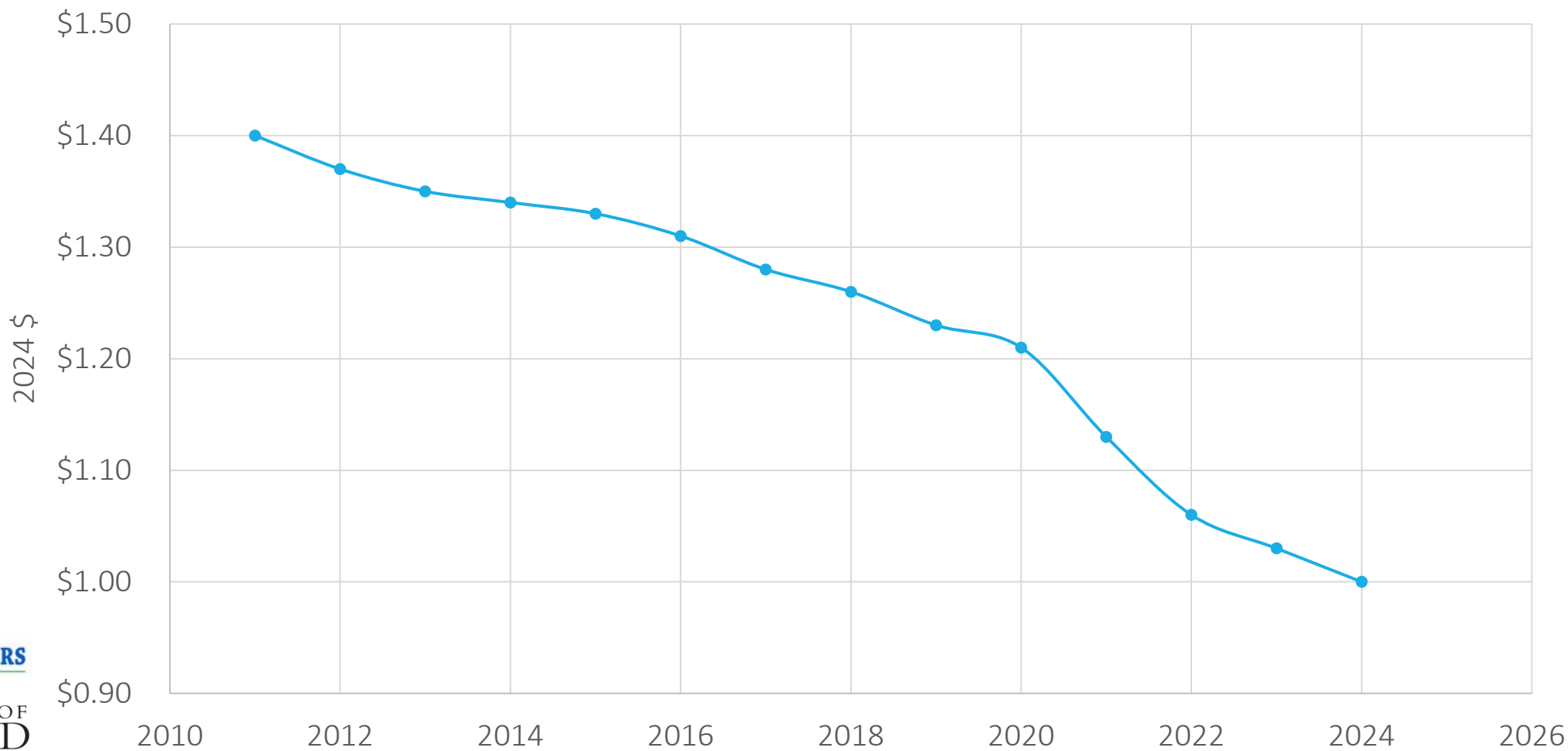


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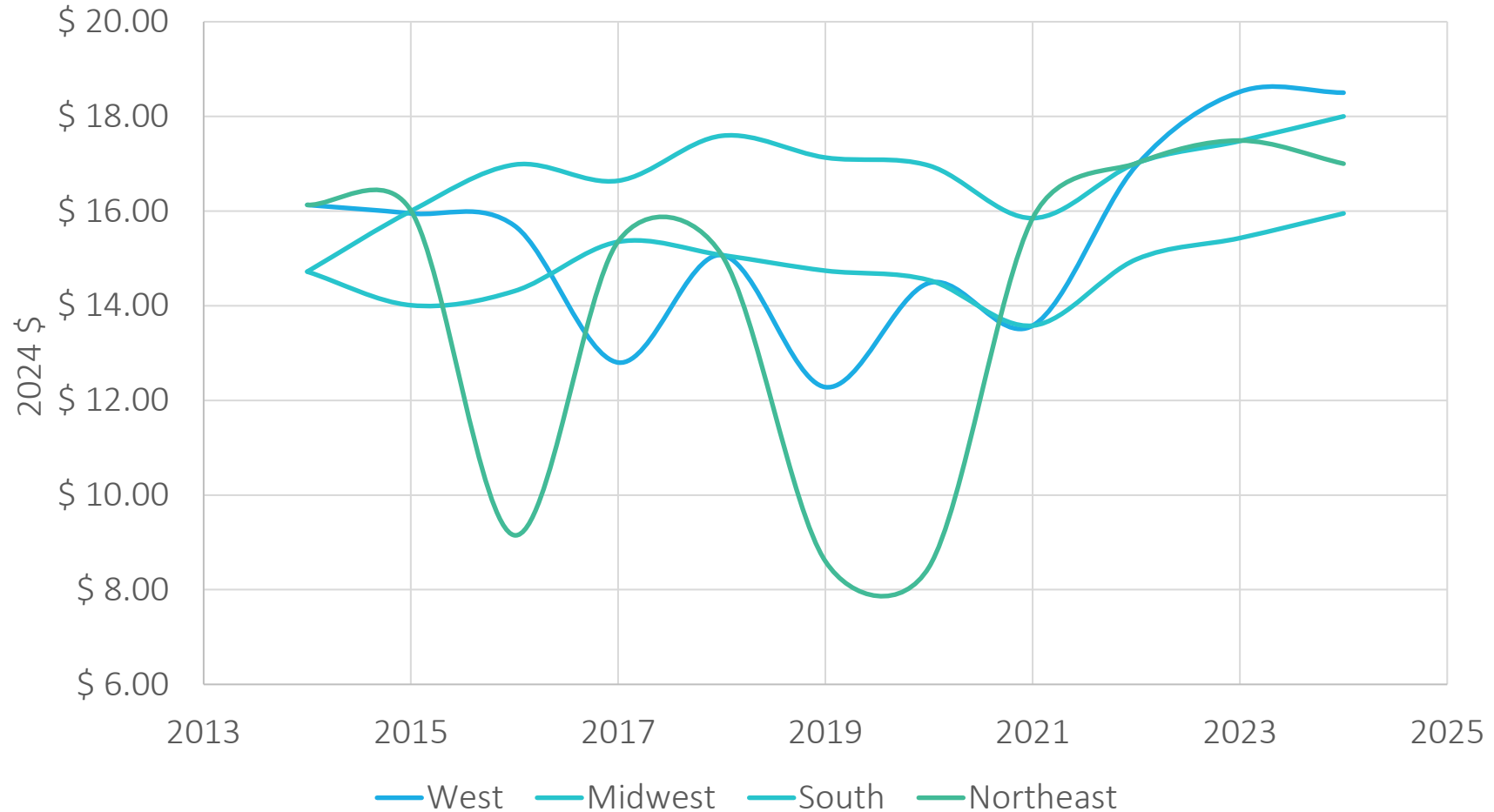


# "Buck-a-Shuck" Oyster Prices (2024 \$)



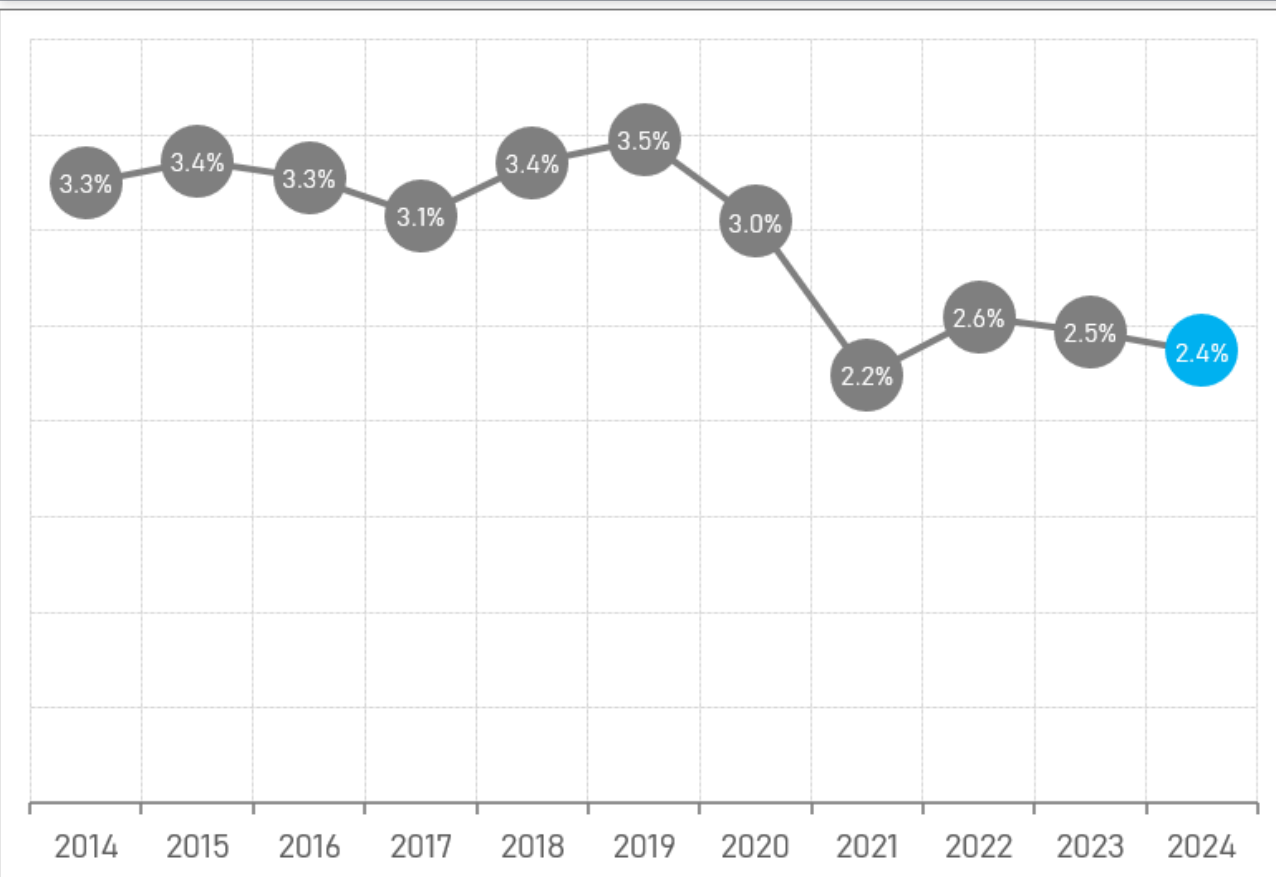
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# Median non-fried oyster appetizers prices adjusted for inflation (2024 \$)



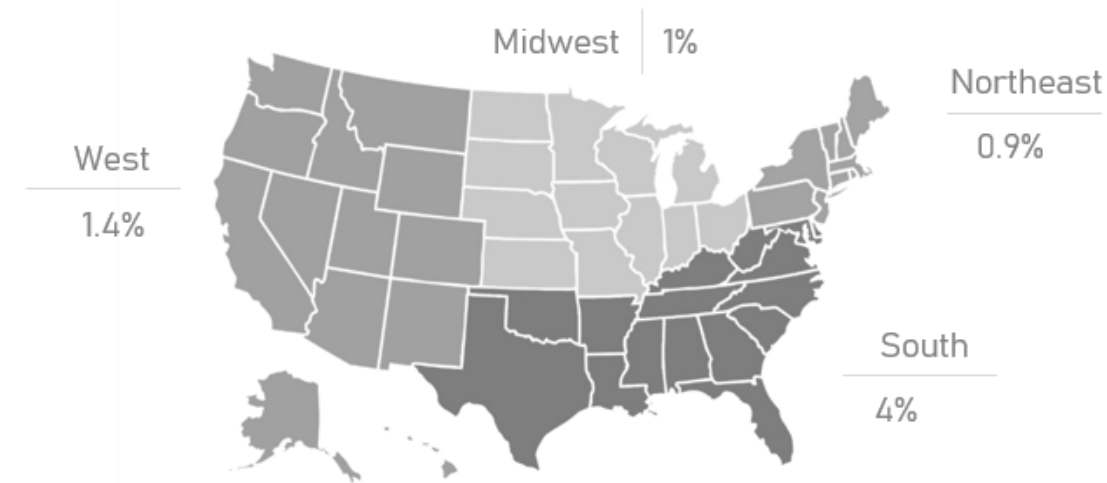
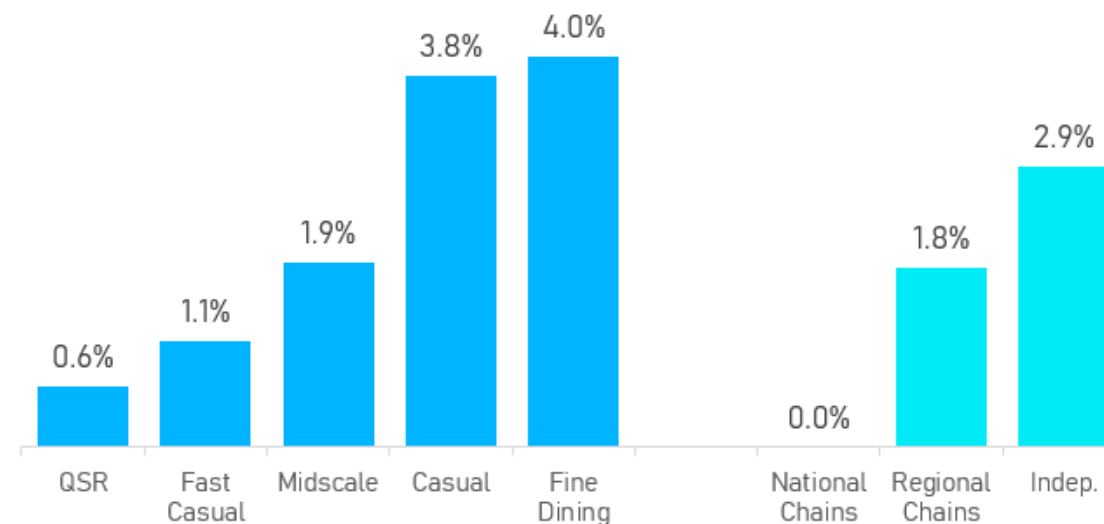
## HISTORIC MENU PENETRATION

% of US restaurant menus that feature;  
current year = annual data for YE Q4 2024



## BY RESTAURANT TYPE

% of US restaurant menus that feature







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# Exports and Imports

# Exports

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- NMFS statistics show roughly 10% of U.S. farmed-oyster production is exported.
- Canada consumes about \$10 million worth of U.S. oysters.
- Hong Kong's imports have declined by half to about \$3 million since 2019.
- The rest of Asia imports ~\$2.6 million, and Europe and S. America report minor imports.

## European Union (EU)

- The industry tried to win access to EU markets after a trade spat erupted. After years of negotiations, limited trade has resumed, allowing two EU countries to send shellfish to the US.
- At the same time, Massachusetts and WA have been permitted to send shellfish to the EU. Assurances were made that additional states and EU nations would be allowed to participate on an "expedited basis," but these assurances remain hollow after several years of no progress.

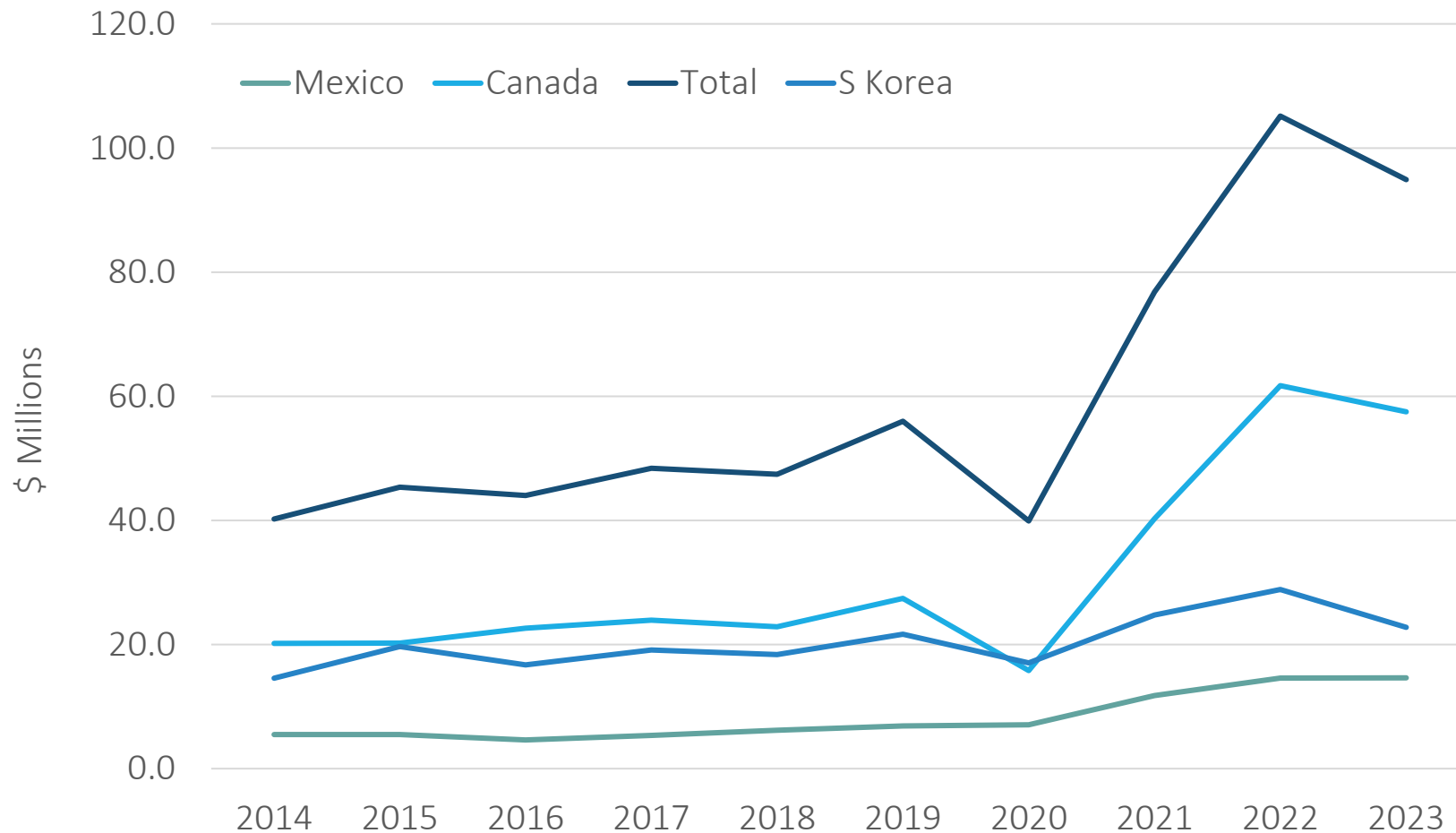


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# Oyster imports from Canada, S. Korea and Mexico (\$ in Millions)







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# Expert Interviews

23 ★s

| Business Name                      | Producer | Hatchery | Processor/<br>Shucker | Wholesaler | Region         |
|------------------------------------|----------|----------|-----------------------|------------|----------------|
| Pangea Shellfish and Seafood Co.   |          |          |                       | x          | MA             |
| Wellfleet Shellfish Co.            |          |          |                       | x          | MA             |
| Samuel and Son Seafood             |          |          |                       | x          | PA             |
| JJ McDonnell                       |          |          |                       | x          | MD             |
| Bon Secour Fisheries               |          |          | x                     | x          | AL, Gulf Coast |
| Fortune Fish & Gourmet             |          |          |                       | x          | National       |
| Inland Foods                       |          |          |                       | x          | GA             |
| Cape Cod Oyster                    | x        |          |                       | x          | MA             |
| Island Creek                       | x        | x        |                       | x          | MA             |
| Fishers Island Oysters             | x        |          |                       |            | NY             |
| Northcoast                         |          |          |                       | x          | MA             |
| American Mussel Harvesters         | x        |          |                       | x          | RI             |
| Cherrystone                        | x        | x        |                       | x          | VA             |
| Ward Oyster Co.                    | x        | x        |                       | x          | VA             |
| Bevans Oyster Co.                  | x        | x        |                       | x          | VA             |
| Navy Cove Oyster                   | x        |          |                       |            | AL             |
| Taylor Shellfish                   | x        | x        | x                     | x          | West Coast     |
| Hog Island Oyster Co.              | x        | x        | x                     | x          | CA             |
| Pacific Seafoods                   | x        | x        | x                     | x          | West Coast     |
| Goose Point Oysters                | x        | x        | x                     | x          | WA             |
| Grand Isle Seafarms                | x        |          |                       | x          | AL             |
| Other                              |          |          |                       |            |                |
| Oyster South                       |          |          |                       |            | Gulf & South   |
| VA Institute of Marine Sci. (VIMS) |          |          |                       |            | VA             |



# Expert Interview Highlights

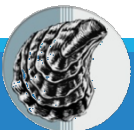


## Preferred Size

- Most consumers appear to prefer a small oyster from 2.5" to 3.5", with some variation for specific markets.
- It is clear there are two types of consumers:
  1. those who prefer the smaller-sized oysters with a deep cup; and
  2. others who prefer a larger 4" oyster who feel they are getting a better value for the price.
- Larger sizes of 4-5" are preferred in Asian markets and for grilling or roasting.

## Value -Added Products

- There is a growing interest in value-added products, such as smoked or tinned oysters, breaded-fried oysters, and frozen, topped half-shell oysters.
- There is a sense that if there was a product that consumers could simply toss in the microwave there would be strong demand.
  - One respondent mentioned their tinned business is up 50% in the last year.
  - Another respondent has secured 450 Whole Foods locations selling tinned "locally sourced" oysters.







# Expert Interview Highlights



## Marketing Research

- There is a widely recognized need for more market research, targeted marketing to the Midwest, and initiatives to share the "farm story" with consumers.
- Telling the unique story of each farm and setting their product apart from the competition according to traits such as flavor or shape.
- This allows growers to avoid price competition. Several respondents specifically mentioned a need to market to younger consumers.
- One respondent suggested a "national marketing effort" to develop a "consistent message."
- Respondents suggest focusing on the sustainability, health, and eco-benefits of eating oysters.
- Government investments in public education provide opportunities to improve social license for oyster aquaculture.
- Educational campaigns should dispel myths or at least put things in perspective, especially surrounding environmental concerns (i.e. contaminants such as PFAS or microplastics.)





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# Recommendations



# Recurring Themes from 23 Interviews Reveal 4 Overarching Recommendations

- 1) Increase collaboration between growers, marketers, and regulators to address industry challenges and promote sustainable growth.
- 2) Invest in public education campaigns to dispel myths about oyster safety and highlight their environmental benefits.
- 3) Develop marketing strategies that emphasize oyster quality, sustainability, and unique culinary experiences.
- 4) Explore new technologies and farming practices to improve oyster survival rates and address environmental threats.

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## U.S. Oyster Aquaculture Market Outlook

NOAA Fisheries Office of Aquaculture commissioned a report examining market potential for oysters produced in the United States. Highlights, as follow, provide insights to guide private businesses and public policy decisions towards supporting a thriving oyster industry.



### Current Market Landscape

Current U.S. oyster supply is roughly balanced by weight, consisting of 26% wild harvest, 32% aquaculture, and 41% imports. In 2023, the estimated value was \$327 million for aquacultured oysters, \$240.5 million for wild harvest, and \$199.8 million for imported oysters (USDA Census of Aquaculture, NMFS). NMFS statistics show roughly 10% of U.S. farmed-oyster production is exported. Canada consumes about \$10 million worth of U.S. oysters. Hong Kong's imports have declined by half to about \$3 million since 2019. The rest of Asia imports about \$2.6 million, and Europe and South America report minor imports. Atlantic Canada is

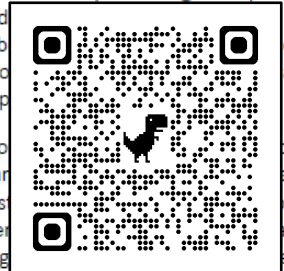
### Regional Oyster Production

Oyster aquaculture dominates in the Northeast and West Coast, where wild harvest is minimal. Intensively farmed, hatchery-reared oysters are less common in the Gulf and Southeast.

**New England** Dominated by small growers often limited by access to large leases, preventing economies of scale enjoyed by larger firms or importing countries.

**Mid-Atlantic** Historically major producers, production was decimated by diseases, but development of disease-resistant lines allowed a resurgence of farmed oysters. Virginia expanded production and has returned to be a major producer. Maryland also joined the top tier.

**Gulf Coast** Louisiana has long been a major producer, but its production has declined significantly in the past, although interest in oyster farming is being reintroduced in Florida, Alabama, Mississippi and Texas, allowing production in higher salinity





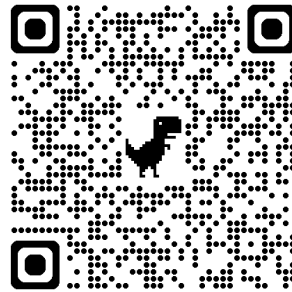
# Recommendations

- 1) Value-added products
- 2) Wet Storage
- 3) Genetics for disease resistance and production traits
- 4) Consolidation for economies of scale
- 5) Mechanization or cutting production costs and labor
- 6) Marketing, esp. emphasize quality and sustainability of farming practices
- 7) Economic analyses & improved aquaculture data

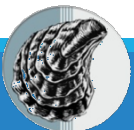


# Questions?

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