

## LEASE STATISTICS

### Background

Lease information is not easily gained. Data appear to have been compiled upon request and at infrequent intervals, skipping many years. What is available shows an industry that has fallen by more than 2,500 acres.

For the 2002 Leaseholder Survey, information on number and sizes of leases was calculated, providing initial data for the study on the size of the industry.

<b>County</b>	<b>Leases</b>		<b>Acres</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
Anne Arundel	97	12.1	853	11.3
Calvert	44	5.5	216	2.9
Cecil	1	0.1	21	0.3
*Charles	6	0.8	47	0.6
*Dorchester	126	15.8	1,494	19.9
*Queen Anne's	13	1.6	91	1.2
St. Mary's	138	17.3	1,119	14.9
*Somerset	149	18.6	1,457	19.4
*Talbot	76	9.5	518	6.9
Wicomico	139	17.4	1,569	20.8
Worcester	10	1.3	139	1.8
<b>TOTAL</b>	<b>799</b>	<b>100.0</b>	<b>7,524</b>	<b>100.0</b>

*Table 1. Number and acreage of leases by county in Maryland, 2000*

*\*Denotes counties where new leases are prohibited (including Kent County). (Source: Maryland Department of Natural Resources, Fisheries Administration)*

For the 2002 survey, MDNR leasing records were sorted by location. The number of lease parcels in Maryland has declined to less than 800. This represents a decrease of over a hundred in fifteen years. Few new leases have been granted while leaseholders with existing leases tend to keep them since they realize that there are not likely to be new leases available due to legislated prohibitions against leasing in many counties. These leases represent the traditional oyster producing counties.

The fewest leases are in upper Bay counties. Oyster culture was not as important there as lower salinity kept oysters from growing as quickly as those downstream. Most leases are located on the lower Eastern Shore in Somerset, Wicomico, and Dorchester, which together comprise over 52% of the total. Clustering of grounds in these three counties occurred as oyster-buying companies had undertaken a program to encourage watermen to obtain leased grounds so the buyers could build year-round markets. The industry thrived until disease epizootics of the '80s.

<b><i>Month/Year</i></b>	<b><i>Number of Leases</i></b>	<b><i>Total Acres Leased</i></b>
Sep 74	1,158	9,903
Feb 86	920	8,961
Jan 88	942	9,369
Aug 90	935	9,470
Nov 91	886	8,996
Dec 97	847	8,034
Aug 00	799	7,524
Jan 03	797	7,276

*Table 2. Number and Acreage of Leases Across a Twenty-nine (29) Year Period.\**

\*The number of leases reflects the total individual leases on record at that time. The number of actual leaseholders is approximately one-third less due to the ability to hold more than one lease. Leased acreage has declined over 20% since 1990, most likely reflecting rapid expansion of oyster diseases. Acres by count has also changed since legislation culminating in the 1960s closed many county waters to further leasing.

## PRODUCTION FROM LEASES

Oysters harvested from leases are subject to harvest and export taxes in the same manner as production from the public fishery. Table 3 presents the quantity and value of both public and private harvests reported since the beginning of the 1974-75 oyster season. Although prices received have not been tabulated separately since a reorganization of reporting methods in 1983, values for private oyster harvests averaged \$1.35 per bushel higher than public harvests (slightly over 20% more) in prior years. An analysis of harvest month in the last five years demonstrates that over 97% of the oysters from private growers were harvested during the months of the seasonal closure of the public fishery, accounting for greater value for their product.

*Table 3. Private and Public Oyster Harvest*

Season	Public Harvest (bu.) Private Harvest	Public Harvest Value (\$) Private Harvest Value	Total Harvest (bu.)	% Private	Total Value (\$)
1974-75	2,502,464 56,648	11,378,099 287,070	2,559,112	2.21	11,665,169
1975-76	2,369,451 79,989	14,037,168 589,219	2,449,440	3.27	14,626,387
1976-77	1,861,027 30,587	13,659,272 275,281	1,891,614	1.62	13,934,553
1977-78	2,255,156 56,279	14,990,274 480,331	2,311,435	2.43	15,470,605
1978-79	2,151,522 45,935	14,406,786 413,021	2,197,457	2.09	14,819,807
1979-80	2,063,932 47,148	17,207,349 445,112	2,111,080	2.23	17,652,461
1980-81	2,473,183 59,138	19,662,166 504,070	2,532,321	2.34	20,166,235
1981-82	2,253,406 53,945	20,042,528 430,767	2,307,351	2.34	20,473,295
1982-83	1,447,414 32,371	14,479,980 323,710	1,479,785	2.19	14,803,690
1983-84	1,059,378 19,682	14,595,255 271,218	1,079,060	1.82	14,866,473
1984-85	1,119,963 21,948	16,860,771 330,317	1,141,911	1.92	17,191,088
1985-86	1,518,519 38,572	16,241,276 412,546	1,557,091	2.48	16,653,822
1986-87	947,102 28,923	16,026,750 489,432	976,025	2.96	16,516,182
1987-88	350,806 12,453	7,089,825 251,676	363,259	3.43	7,341,501
1988-89	395,688 2,820	7,390,814 52,673	398,508	0.71	7,443,487
1989-90	410,876 2,716	9,845,367 65,080	413,592	0.67	9,910,447
1990-91	416,087 2,306	9,399,760 52,095	418,393	0.55	9,451,855

1991-92	318,093 5,093	6,347,844 101,695	323,186	1.58	6,449,539
1992-93	122,205 1,413	2,656,066 30,711	123,618	1.14	2,686,777
1993-94	78,818 793	1,362,286 13,706	79,611	1.00	1,375,992
1994-95	164,674 1,715	3,261,248 33,964	166,389	1.03	3,295,212
1995-96	193,715 7,602	3,319,109 130,253	201,317	3.78	3,449,362
1996-97	171,805 5,795	3,734,595 125,968	177,600	3.26	3,860,563
1997-98	284,463 516	5,743,822 10,419	284,979	0.02	5,754,241
1998-99	413,591 8,872	7,827,927 167,918	422,463	2.10	7,995,845
1999-2000	380,136 1,424	7,249,846 27,158	381,560	0.04	7,277,004
2000-01	343,353 0	6,769,505 0	343,353	0	6,769,505
2001-02	151,439 0	2,986,193 0	151,439	0	2,986,193

NOTES:

<sup>1</sup>After 1986, public harvest is based on reporting by NOAA codes, which also report the value of public bushels. Private bushels are by NOAA codes but the values are not. Value of private harvest is, from that point, based on public harvest values.

<sup>2</sup>Private lease production declined to "0" between 2000 and 2006, but showed an "80" bushel harvest in 2007.

It should be noted that the data reflect reported harvests, and there have been suggestions that actual figures may differ. From the reports, however, harvest from leases was found to average 1.76 % of the total harvest over the twenty-eight year span. From 1974 until the drought of 1987-1988, which reduced catches in the commercial fishery by well over a million bushels per year as oyster disease spread throughout the region, harvest from leases averaged 2.30% of the total harvest very consistently.

In subsequent years, as repletion effort maintained commercial harvests by using seed from wherever small oysters were available, private harvest succeeded only whenever spatfall on leases was followed by non-drought years. This resulted in lower relative catches (averaging 1.29% of commercial harvests) and greater variability from year to year.

In four of the past five years, private harvest reflected poor survival in areas where leasing is permitted. Disease and sporadic recruitment have affected production from state seed beds for private leaseholders as well, with less than 12,000 bushels of seed sold since 1992. Currently, this program has exhausted its funding and no longer provides seed for private oyster production.