Fal Oyster Survey Summary Report 2026

A temporal comparison from 2022 to 2026

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Cornwall IFCA Inshore Fisheries and Conservation Authority

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Fal Oyster Survey 2026 Summary Report

Introduction and methodology

Introduction

- Cornwall Inshore Fisheries and Conservation Authority (IFCA) has been responsible for the management of the Fal Oyster[1] Fishery since July 2014.
- Cornwall IFCA initially authorised the fishery under the Closed Areas (European Marine Sites) Byelaw 2 then later, as Grantee of the Fal Fishery Regulating Order 2016. The Fishery Area is shown in Figure 3.
- Cornwall IFCA has continued to monitor the stock of oysters by carrying out yearly surveys of the fishery since 2014.
- The Fal Fishery Regulations, made under the Fal Fishery Order 2016, were updated in August 2025, so that 'a person must not remove from the fishery area any oyster (*Ostrea edulis*) which will pass through a circular aperture of 72mm diameter when the shell is laid flat across the aperture, but shall immediately return the oyster to the sea'[2]. This was updated from a size of 67 mm before 2026.
- Cornwall IFCA undertook a relay project in 2025, with a total of 10,263 oysters (c. 1.2 tonnes) distributed over an area of about 5,300 m^2, giving an approximate relay density of about 5/m^2. The aim of the trial was to distribute native oysters (*Ostrea edulis*) into the River Fal using oysters purchased from licence holders of the Fal Oyster Fishery to increase density in a discreet area with the objective of improving the potential for increased larvae production.
- One member of staff from the Isles of Scilly IFCA and two students from the University of Exeter assisted onboard for the four days and were a huge benefit to the survey and helped complete the survey within the allocated time frame.

Aims

- To investigate the temporal changes in the relative abundance and distribution of native oysters (*Ostrea edulis)* based on catch rates from 2022 to 2026, inclusive, within the Fal Oyster Fishery.
- To investigate the temporal changes in the relative abundance and distribution of scallops (both queen scallop, *Aequipecten opercularis* and variegated scallop, *Mimachlamys varia)* based on catch rates from 2022 to 2026 within the Fal Oyster Fishery.
- To investigate the temporal changes of the relative abundance and distribution of slipper limpets (*Crepidula fornicata)* from 2022 to 2026 within the Fal Oyster Fishery.
- To record the distribution of substrate types across the fishery in 2026.
- To record the species of bycatch present across the survey area in 2026.

Method – Data Collection

The survey was carried out onboard Research Vessel (R/V) Tiger Lily VI (Figure 1). For the majority of the sites, a tow haul method was adopted. At each survey site the survey vessel was anchored and 60 m of anchor line was paid out. For ten of the sites, the anchor was not used due to habitat, weather and an issue with the anchor bow roller, instead allowing the vessel to drift for 50 m, the accuracy of which was ensured by using radius rings for each remaining site in HYPACK MAX 2025. This method was considered comparable with the previous method.

The dredge used was a 72 cm blade, Essex style oyster dredge, rigged with 34 mm diameter steel belly rings and a 45 mm (twin 3 mm nylon twine) mesh back. The dredge was deployed using the vessel's A frame, and the slave hauler winch was used to take up 50 m of marked anchor line, resulting in a 50 m dredge tow at a steady 0.5 to 1 knot. The towing warp was run via the A frame mounted hydraulic winch.

A target was created in HYPACK MAX 2025 to indicate the start of line (SOL); this was repeated at the end of line (EOL). A photo was taken of the full dredge contents with a clapperboard once onboard, on the table (Figure 2). The native oysters were measured and weighed individually where possible, the scallops were measured and the slipper limpets were counted. Non-natives were removed from the Fishery and bycatch species were recorded on a list as being present for the survey period.

[1] The term oyster refers to the native oyster (*Ostrea edulis*).

[2] Regulations under the Fal Fishery Order 2016 [2025-Regulations-under-the-FFO-2016.pdf]

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Figure 1: R/V Tiger Lily VI – Cornwall IFCA's research survey vessel.

Figure 2: Survey setup on R/V Tiger Lily VI.

Method – Data Analysis

Survey data were analysed to enable temporal comparisons between 2022 and 2026. Catch data from each tow were standardised by area swept and are presented as density (number of individuals per 10 m²).

- **Temporal Comparisons**

Temporal trends in oyster and scallop abundance, density, and distribution were assessed by comparing standardised catch rates across survey years (2022–2026). Survey sites were repeated annually to ensure comparability between years.

Year-on-year changes were calculated as both absolute differences (number of individuals) and percentage change relative to the previous year.

- **Size class analysis**

Oysters were grouped into size classes based on shell length (mm) to assess population structure. For survey years 2022–2025, size classes were defined as:

≤35 mm

≥36 to ≤50 mm

≥51 to ≤66 mm

≥67 mm

Following the introduction of a revised minimum size in August 2025, size classes for the 2026 survey were adjusted to:

≤35 mm

≥36 to ≤50 mm

≥51 to ≤71 mm

≥72 mm

This revision reflects the updated minimum size and aligns the analysis with current management measures. Where comparisons are made between years, this change in size class definition is taken into account, and direct comparisons of the largest size classes should be interpreted with caution.

Scallops were also grouped into size classes based on shell length to assess population structure. Size classes were defined as:

≤19 mm

≥20 to ≤39 mm

≥40 to ≤59 mm

≥60 mm

- **Length Weight Analysis**

Shell length and weight (g) were analysed for individual oysters, where available. Length–weight relationships were assessed using second-order polynomial regression to capture the non-linear growth pattern of oysters. Length measurements were converted to centimetres prior to analysis.

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Descriptive statistics (mean, median, interquartile range, and standard error) were calculated to summarise variation in oyster size and weight across survey years.

The data described above were analysed by Management Area (Areas A, B and C; Figure 3).

- ### Spatial Analysis

Spatial patterns in oyster and scallop density, and size composition, were analysed and visualised using mapped survey data. All spatial analyses were based on standardised survey densities.

Density plots were produced using natural neighbour interpolation in MapInfo to represent the distribution of oyster, scallop and slipper limpet densities across the fishery. These plots were generated using polygons covering the North Bank, East Bank, and the main channel and fished areas of the Upper River. For context, these groupings broadly correspond to Fal Fishery management areas but are not directly equivalent:

- North Bank ≈ Area A
- East Bank ≈ Area B
- Upper River ≈ Area C

These regions were applied consistently across all survey years to support comparison of spatial trends through time and represent broad spatial patterns within the fishery rather than formal management units.

Size class composition plots were also produced in MapInfo, displaying data at individual survey locations using pie charts. This approach allows assessment of spatial variation in population structure between regions.

Throughout the report, results are presented in line with the spatial groupings described in the figure caption. Analyses are conducted primarily by management Areas A, B, and C, while spatial mapping is generally presented using the broader geographic groupings (East Bank, North Bank, Upper River), with cross-references included where relevant.

Survey positions

A total of 81 sites were surveyed in 2026, 30 in Area A, 35 in Area B and 16 in Area C, as shown in Figure 4. The sites are repeated year on year, where possible, to allow for temporal comparisons.

Introduction and methodology

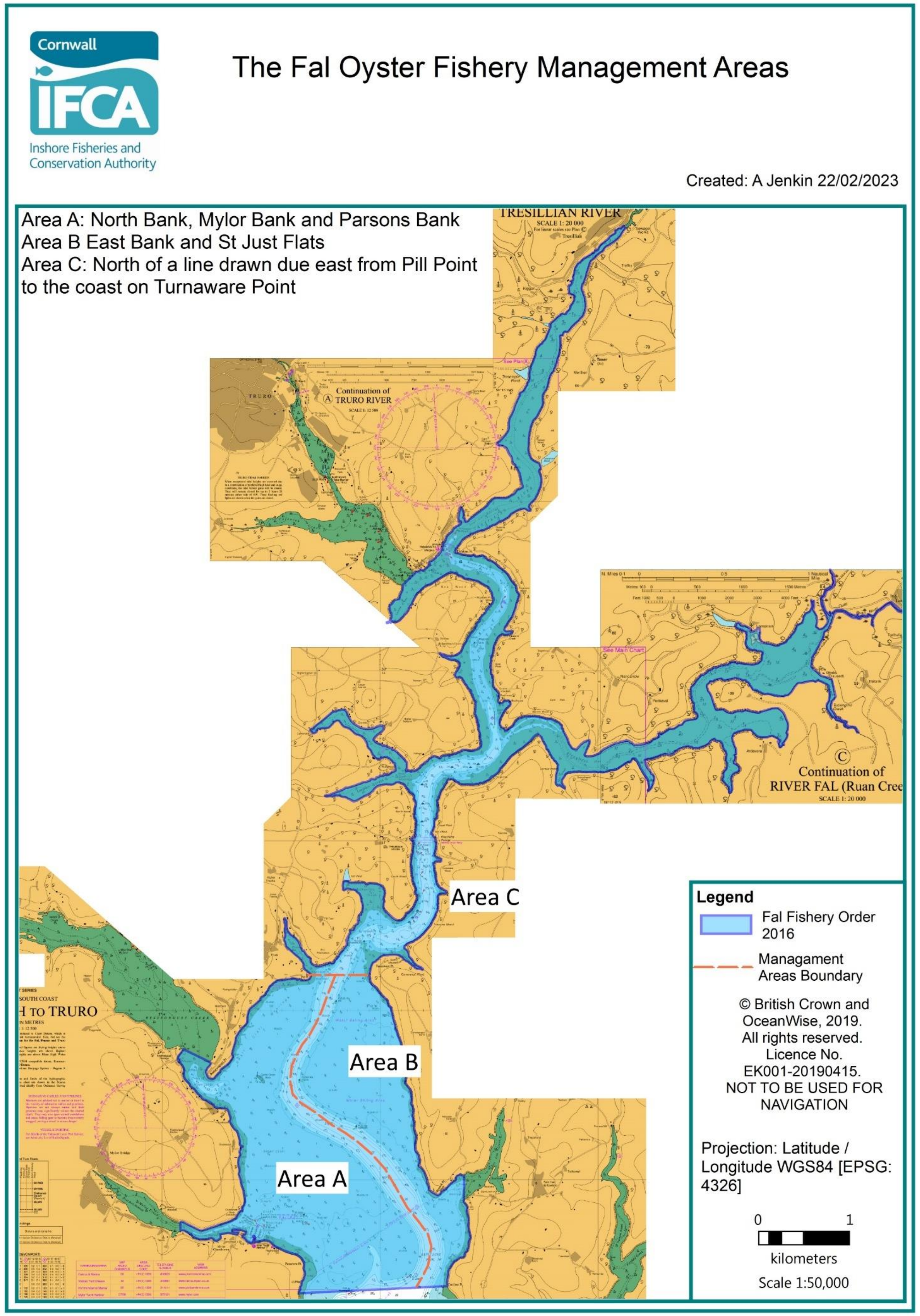

Figure 3: The management areas, A, B and C of the Fal Oyster Fishery.

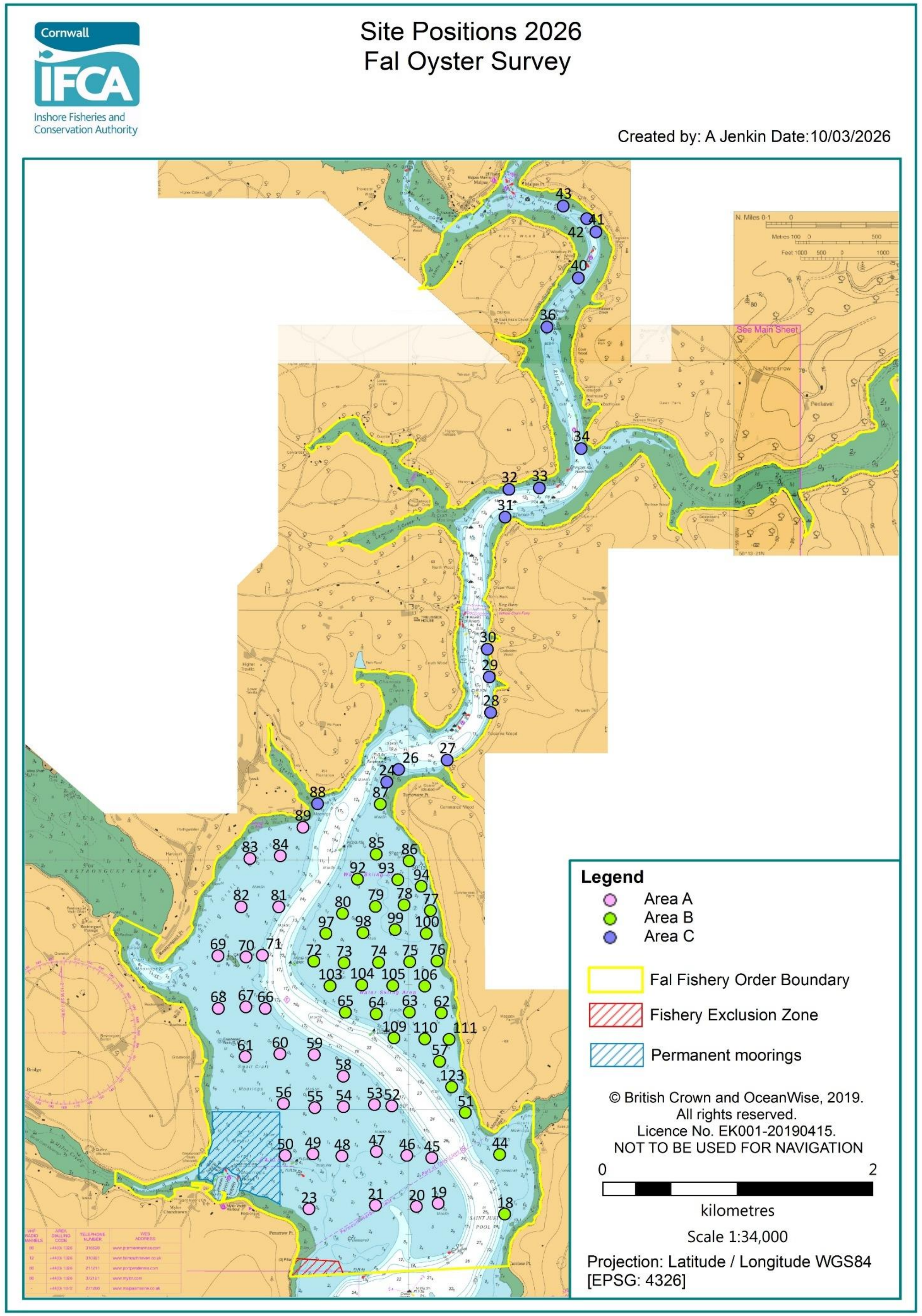

Figure 4: The Fal Oyster Survey area and survey sites in the River Fal, split by management areas A, B and C from the 2026 survey.

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Native oysters (*O. edulis*) – Number of oysters

Oysters

A summary of the number of sites surveyed, the number of native oysters recorded, and the year-on-year changes from 2022 to 2026 is presented in Table 1. The 2026 survey recorded the highest number of native oysters (4,490) observed by Cornwall IFCA since assuming management of the Fal Oyster Fishery in 2014 with an increase of 58% on the previous year. The average number of oysters per site shows the same upward trend, increasing from 20.49 oysters per site in 2022 to 55.43 in 2026. Year-on-year changes have varied in magnitude but overall, the data indicates a substantial growth in oyster numbers across the fishery from 2022 to 2026.

Table 1: Summary of survey data and the number of native oysters (*Ostrea edulis*) recorded during the Fal oyster survey between 2022 and 2026. *difference from 2021

Year	Number of sites	Number of native oysters	Average number of oysters per site	Difference from previous year (number of oysters)	Percentage difference from previous year
2026	81	4,490	55.43	1640	57.5%
2025	81	2,850	35.19	-11	-0.4%
2024	81	2,861	35.32	+854	42.6%
2023	81	2,007	24.78	+347	20.9%
2022	81	1,660	20.49	*+596	*56.0%

Oyster density increased in all three management areas in 2026 (Figure 5), with Areas A and B showing particularly strong rises following relatively stable densities in 2024 and 2025. This is contrary to years prior, when Area C had the highest density from 2022 to 2023. The trend for Areas A and B has remained similar since 2022, with slightly higher levels in Area A. Area C showed a decrease from 2022 to 2024 and has increased steadily since and remains lower than the densities in Areas A and B.

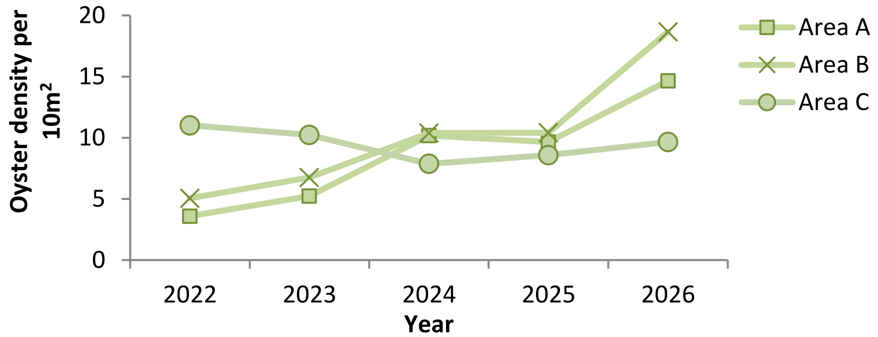

Figure 5: The density of native oysters (*Ostrea edulis*) per 10 m² for the surveyed (dredged) area within each management area (Areas A, B and C) from 2022 to 2026.

Across the monitoring period, oyster densities increased most notably in Areas A and B, with 2026 showing the highest values (Figure 6). In both areas, increases are evident in the ≤35 mm and ≥36–≤50 mm size classes, suggesting a recent recruitment event. Interpretation of larger size classes is limited, as size categories were updated in 2026 to reflect changes to the minimum size, preventing direct comparison with earlier years; however, the ≥51–≤71 mm class shows relatively high densities in 2026, particularly in Areas A and B, with moderate levels also observed in Area C. In contrast, Area C shows no consistent trend overall, with densities fluctuating across years and remaining lower than in Areas A and B in recent years.

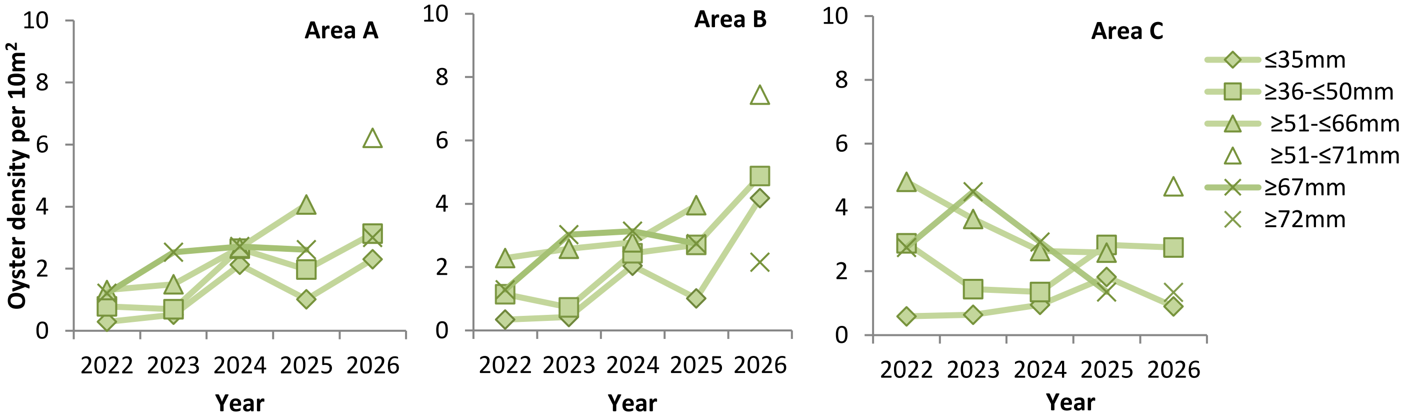

Figure 6: The density of native oysters (*Ostrea edulis*) per 10 m² for the surveyed (dredged) area within each management area (Areas A, B and C) from 2022 to 2026, shown by size class. Size classes were updated in 2026 to reflect changes to the minimum size.

Native oysters (*O. edulis*) – Spatial distribution of oyster densities

The distribution of oyster density (number of oysters per 10 m²) showed broadly consistent spatial patterns across the Fal Oyster Fishery from 2022 to 2026 (Figure 7 and Figure 8). Overall, densities remained low in Area C and relatively stable in Areas A and B, although a marked increase in density was observed across parts of the Fishery in 2026. (Figure 7). In the Upper River, oyster densities remained consistently low (<1 to <3 oysters per 10 m²) throughout the five-year period, with only occasional sites reaching moderate densities. These slightly higher densities were typically confined to a small patch in the mid-section of Area C. Across the main body of the fishery (Areas A and B; Figure 8), the overall spatial pattern remained similar between years, with persistent higher-density patches on the North and East Banks. However, in 2026 there was a noticeable increase in oyster density at several sites, reflected by an expansion of mid- to high-density categories (≥7 oysters per 10 m²) across the central fishery.

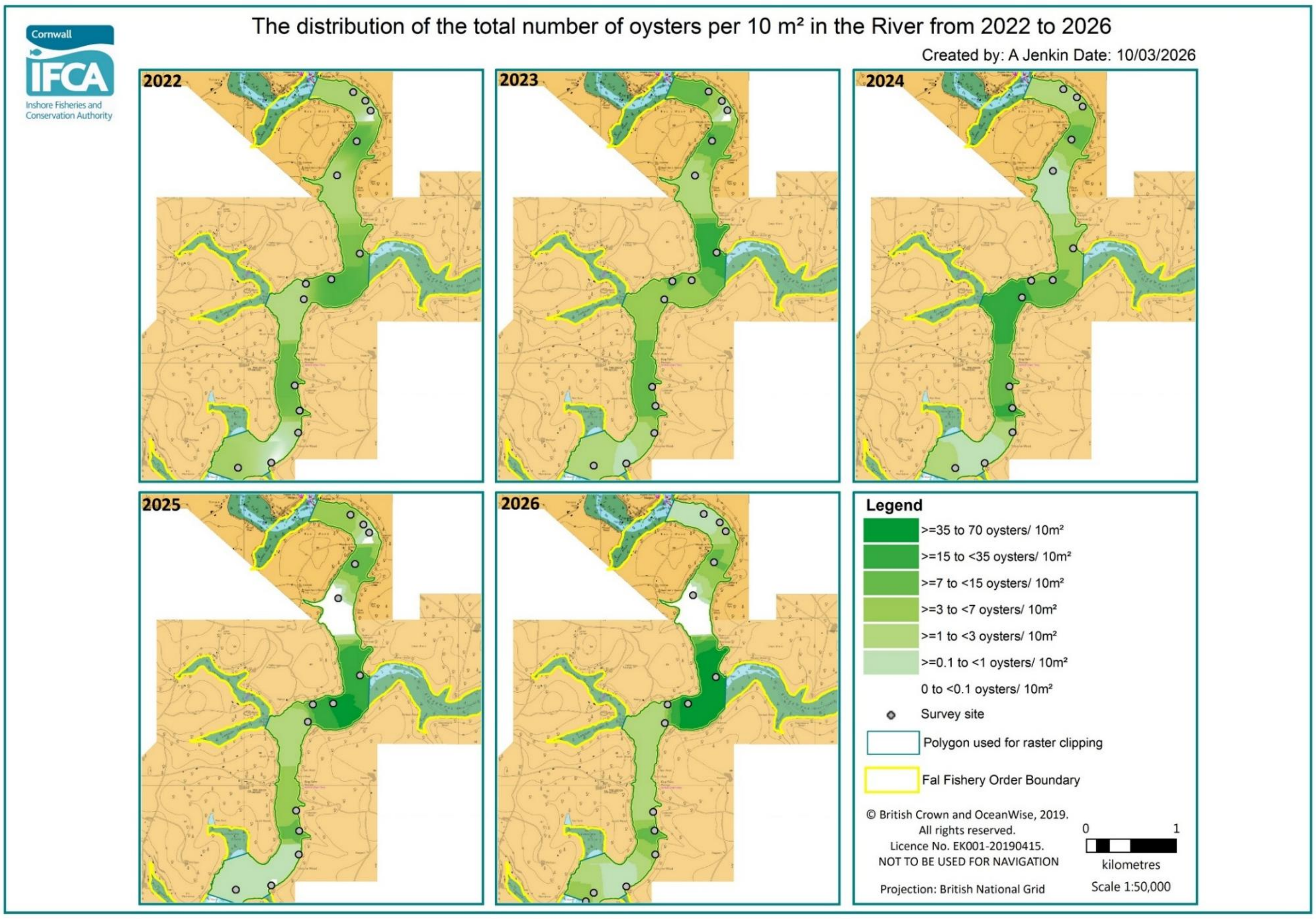

Figure 7: Spatial distribution of native oyster (*Ostrea edulis*) density; number per 10 m² in the Upper River geographic area (within Area C) from 2022 to 2026.

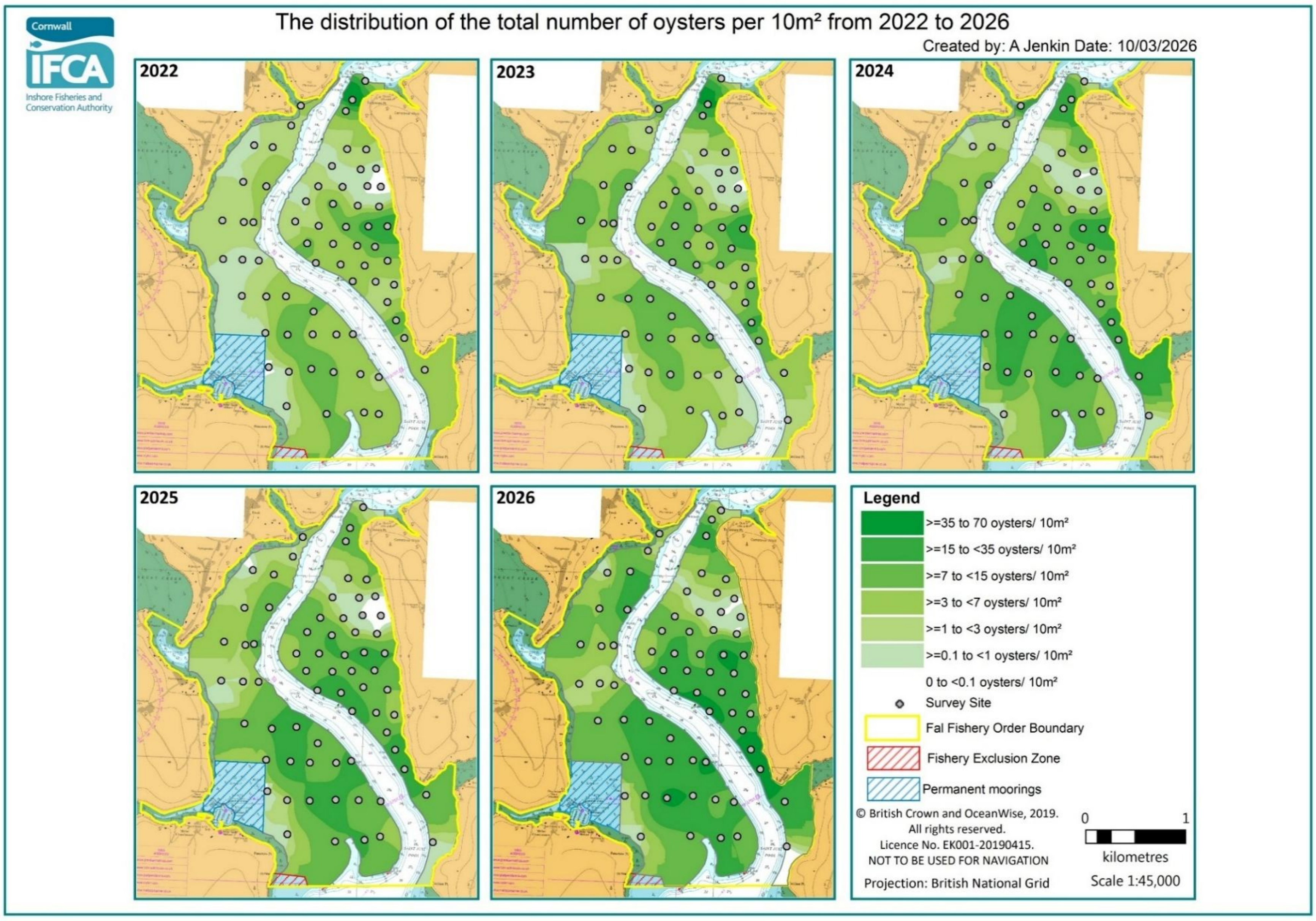

Figure 8: Spatial distribution of native oyster (*Ostrea edulis*) density; number per 10 m²in the North Bank and East Bank geographic areas (roughly corresponding to Areas A and B, respectively) from 2022 to 2026.

Native oysters (*O. edulis*) – Spatial distribution of oyster densities

The distribution of oyster density at the corresponding minimum size thresholds (≥67 mm from 2022–2025; ≥72 mm in 2026), shows broadly stable spatial patterns across the Fal Oyster Fishery, with only modest changes between years. In Area C, large oysters remained relatively sparse throughout the time series, with occasional higher density patches (Figure 9). In Areas A and B, large oysters were least common in 2022, followed by a slight increase in moderate-density patches in 2023 (Figure 10). From 2023 to 2026, the distribution remained fairly similar. Overall, the plots indicate a consistently low presence of large oysters in Area C and a relatively stable distribution in Areas A and B from 2023 onwards.

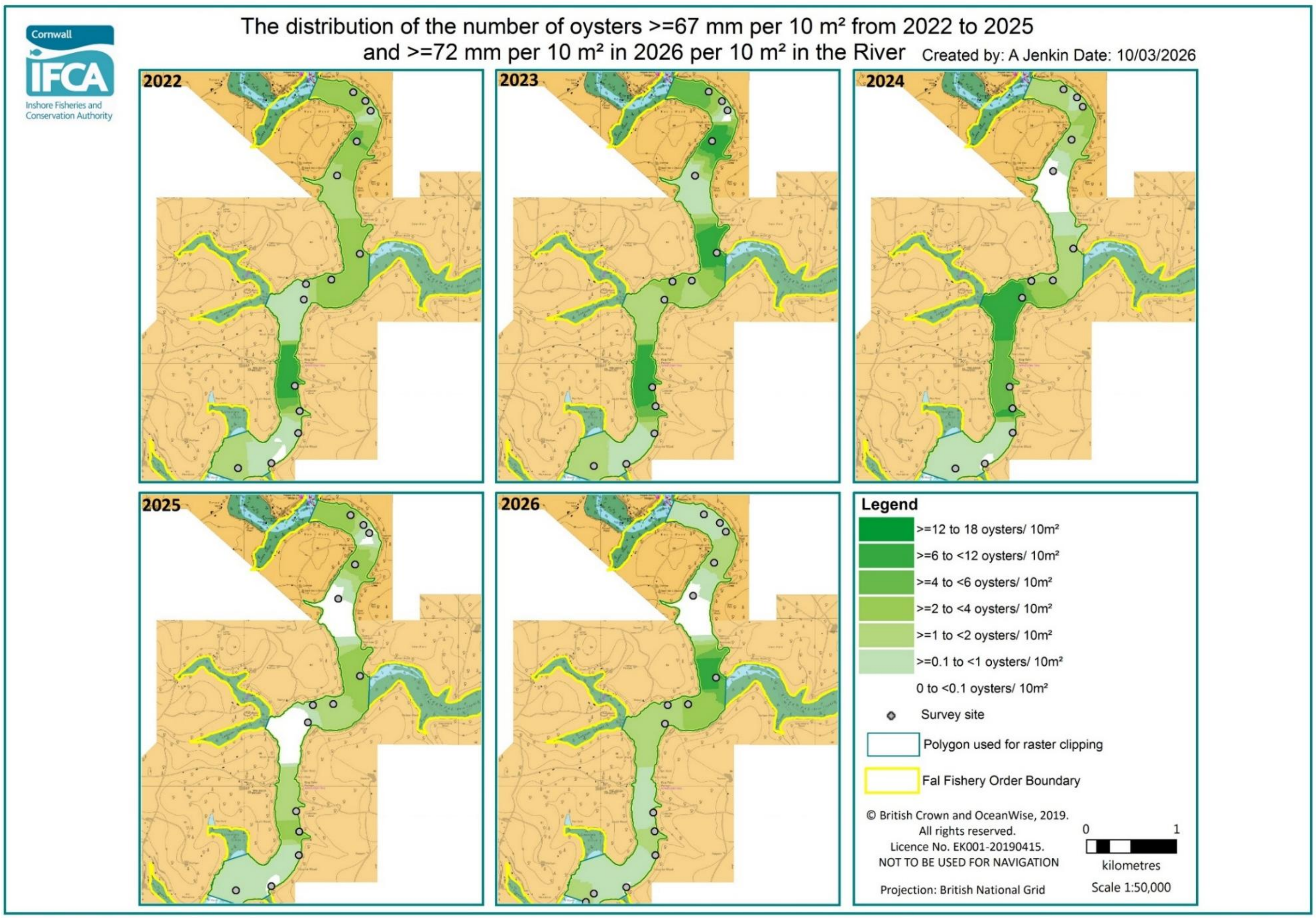

Figure 9: Spatial distribution of native oyster (*Ostrea edulis*) density (number per 10 m²) in the Upper River geographic area (within Area C) from 2022 to 2026. Data for 2022–2025 represent individuals ≥67 mm, while 2026 represents individuals ≥72 mm. Size thresholds were updated in 2026 to reflect changes to the minimum landing size.

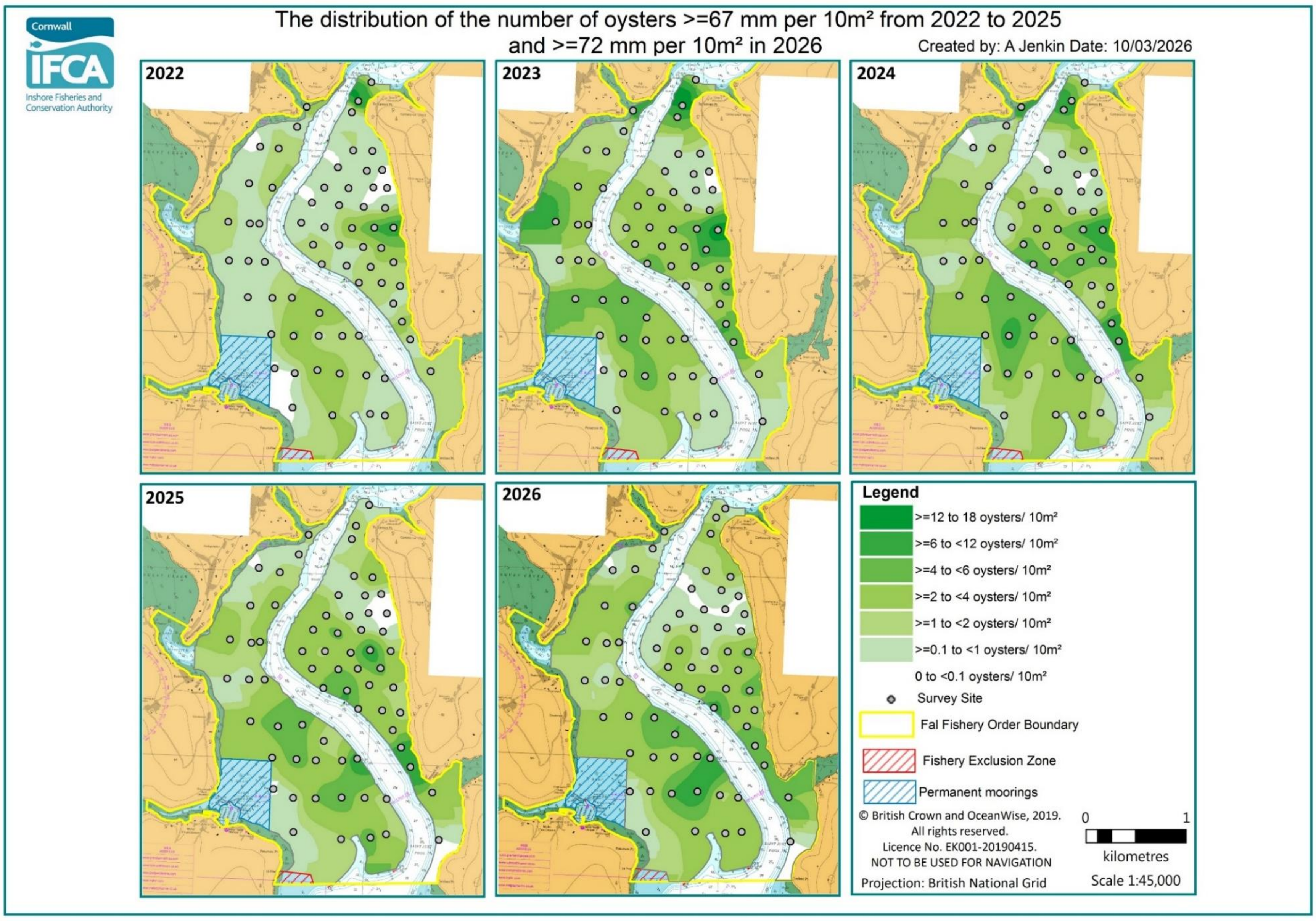

Figure 10: Spatial distribution of native oyster (*Ostrea edulis*) density (number per 10 m²) in the North Bank and East Bank geographic areas (roughly corresponding to Areas A and B, respectively) from 2022 to 2026. Data for 2022–2025 represent individuals ≥67 mm, while 2026 represents individuals ≥72 mm. Size thresholds were updated in 2026 to reflect changes to the minimum landing size.

Native oysters (*O. edulis*) – Spatial distribution of oyster densities

The distribution of density for small oysters (≤35 mm) shows consistently low densities in the Upper River (Area C) throughout the time series (Figure 11), generally remaining below 2 oysters per 10 m², with many sites recording fewer than 1 oyster per 10 m². Although densities in 2025 and 2026 appear slightly higher than earlier years, particularly in the central portion of Area C, they still fall within the lower density classes overall. Across Areas A and B, densities remain relatively low and spatially variable from 2022 to 2025 (Figure 12), with only small patches of moderate density (≥4 oysters per 10 m²) appearing in some years. In 2026, there is a noticeable increase in the density of small oysters, with more sites showing moderate or higher densities than in previous years (Figure 12). This suggests a fairly recent recruitment event has occurred.

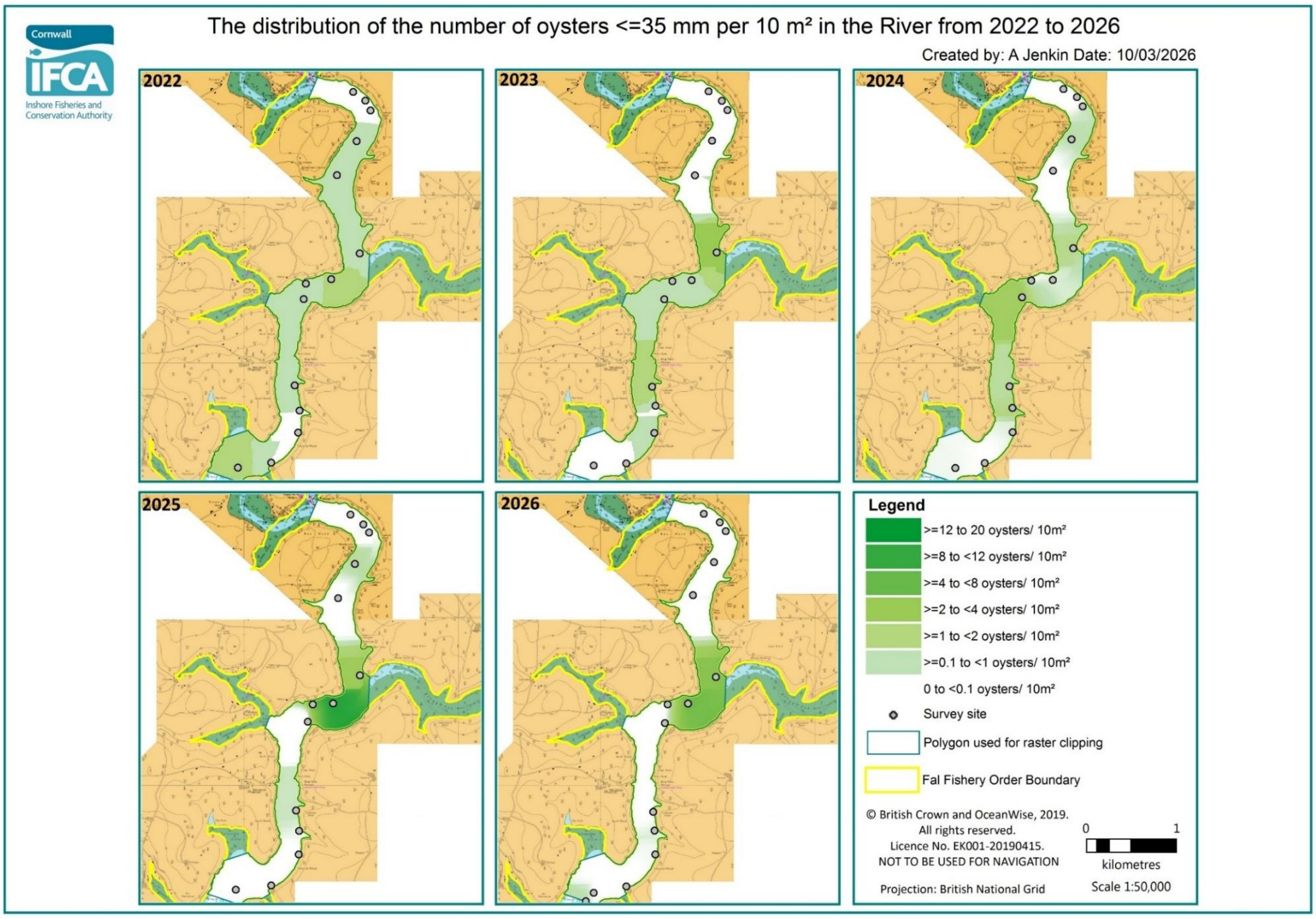

Figure 11: Spatial distribution of native oyster (*Ostrea edulis*) density, individuals ≤35 mm; number per 10 m² in the Upper River geographic area (within Area C) from 2022 to 2026.

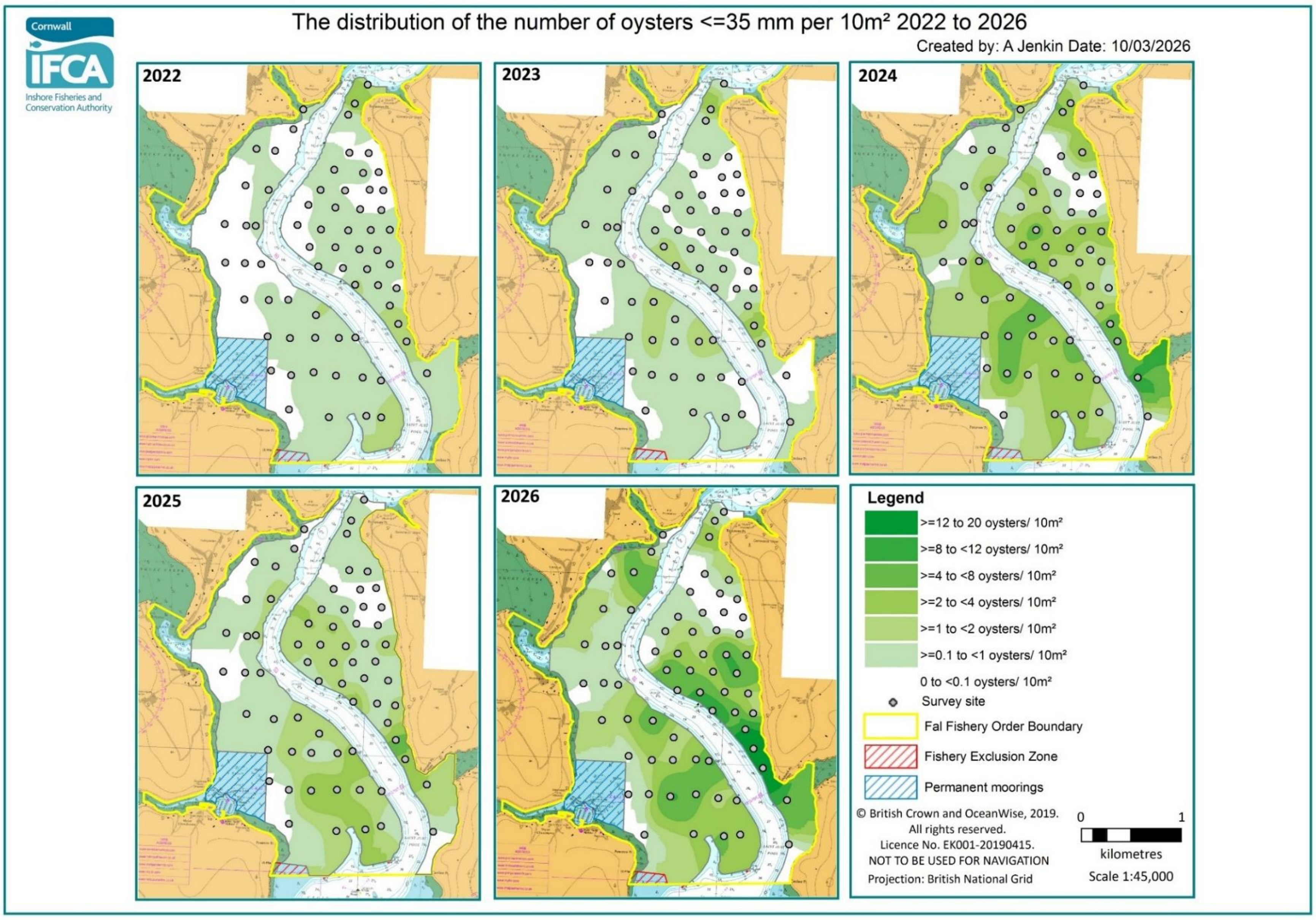

Figure 12: Spatial distribution of native oyster (*Ostrea edulis*) density, individuals ≤35 mm; number per 10 m² in the North Bank and East Bank geographic areas (roughly corresponding to Areas A and B, respectively) from 2022 to 2026.

Native oysters (*O. edulis*) –Size class distribution

Median and mean lengths remained broadly consistent across all years, both falling within a similar mid-range and indicating a stable central tendency in the population (Figure 13). The overall spread of lengths also changed little between years, although 2024 displayed a slightly wider interquartile range than other years. All years contain numerous high-length outliers, most evident in 2023 and 2025, reflecting occasional larger individuals and variability in oyster growth. Overall, there appears to be a stable length structure over time, with variation mainly in the number of extreme values rather than shifts in typical oyster size (Figure 13).

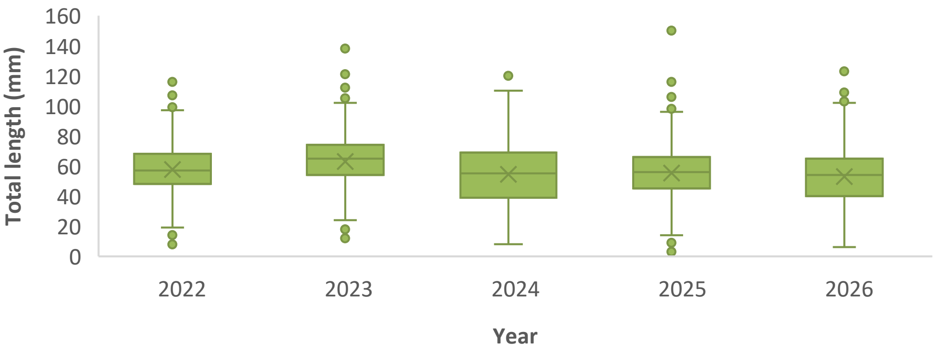

Figure 13: Length distribution plot for all native oysters (*Ostrea edulis*) from 2022 to 2026. Data is grouped by year. X represents the mean, the horizontal line represents the median, boxes represent the interquartile range, whiskers represent 1.5* interquartile range, and the filled circles represent outliers.

Size-class composition varied between years (Figure 14). In 2023, larger oysters (≥67 mm) formed a noticeably greater proportion than in other years. In 2025, the mid-sized classes (≥36–≤50 mm and ≥51–≤66 mm) dominated the distribution. A broadly similar pattern was observed in 2026, where mid-sized classes again represent the largest share, with a greater proportion in the upper mid-sized class (≥51–≤71 mm). However, comparisons with 2026 should be treated with caution due to the change in size class thresholds. The smallest size class (≤35 mm) remained a consistently minor component across all years.

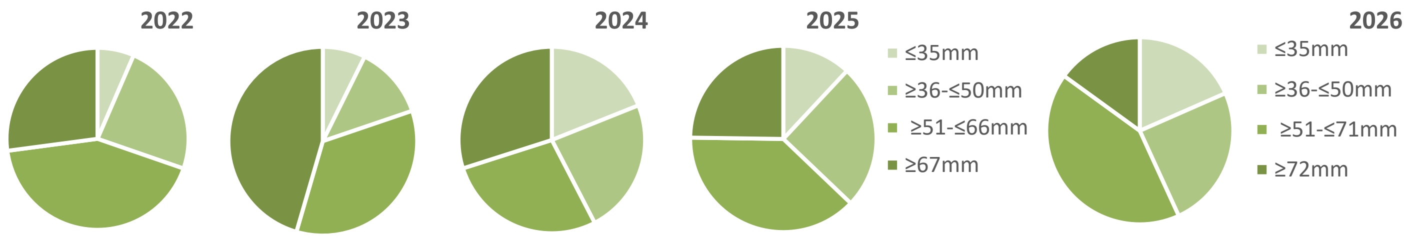

Figure 14: The percentage of native oysters (*Ostrea edulis*) per size class (≥67 mm, ≥51-≤66 mm, ≥36-≤50 mm and ≤35 mm) from 2022 to 2025 and (≥72 mm, ≥51-≤71 mm, ≥36-≤50 mm and ≤35 mm in 2026) from 2022 to 2026. Size classes were updated in 2026 to reflect changes to the minimum size.

Across all three areas and all years, the majority of oysters were below the applicable minimum size threshold (≥67 mm for 2022–2025; ≥72 mm for 2026) (Figure 15). While all three areas show a decreasing proportion of oysters above the minimum size over time, this trend is not directly comparable in 2026 due to the increased minimum size. Nonetheless, oysters below the relevant minimum size dominated the catch composition in every year and area.

Native oysters (*O. edulis*) –Size class distribution

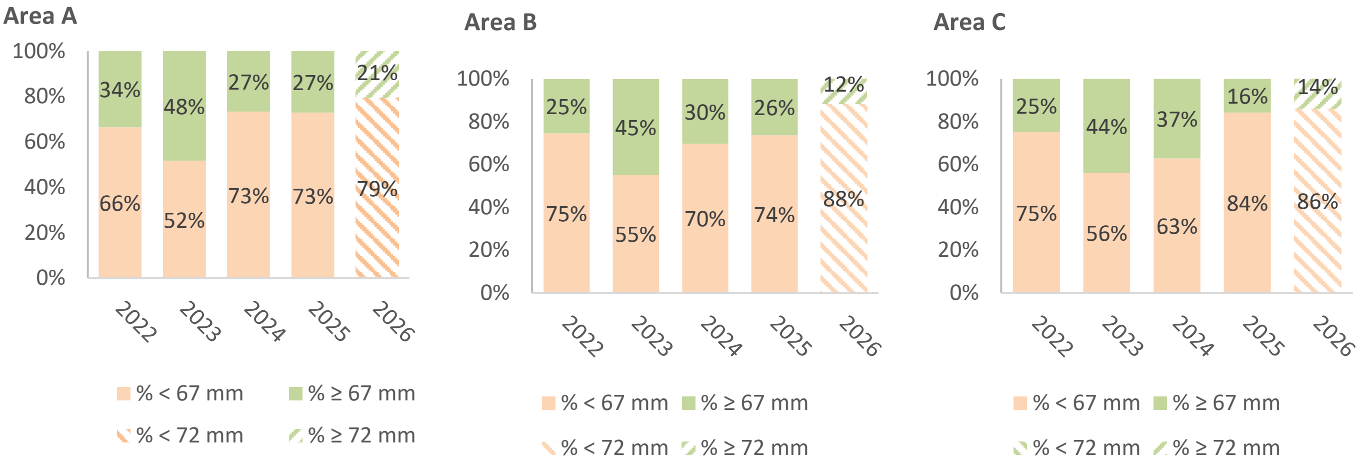

Figure 15: The percentage (%) of native oysters (*Ostrea edulis*) over and under the minimum size of 67 mm for 2022 to 2025 and 72 mm for 2026 for all three management areas (Area A, B and C) of the Fal Oyster Survey area from 2022 to 2026. Size classes were updated in 2026 to reflect changes to the minimum size.

Native oysters (*O. edulis*) – Size class composition

In the Upper River (Area C), oyster abundance showed a slight increase over the time series, although overall counts per site remained relatively low compared to other areas (Figure 16). The size distribution was dominated by mid-sized individuals (≥36–≤50 mm and ≥51–≤71 mm) in 2026. In contrast, Areas A and B (Figure 17) supported substantially higher oyster abundances across all years, with increases evident at most sites from 2022 to 2026. By 2026, these areas were primarily dominated by oysters in the ≥51–≤71 mm size class, with notable contributions from ≥36–≤50 mm individuals and an increase in smaller oysters (≤35 mm), suggesting recent recruitment. Spatially, the highest concentrations occurred in the central and lower parts of Areas A and B, where clusters of neighbouring sites showed mixed size classes, indicating a productive part of the fishery. Overall, Areas A and B showed increasing abundance and a more balanced size structure by 2026, whereas Area C remained low density and dominated by mid-sized oysters.

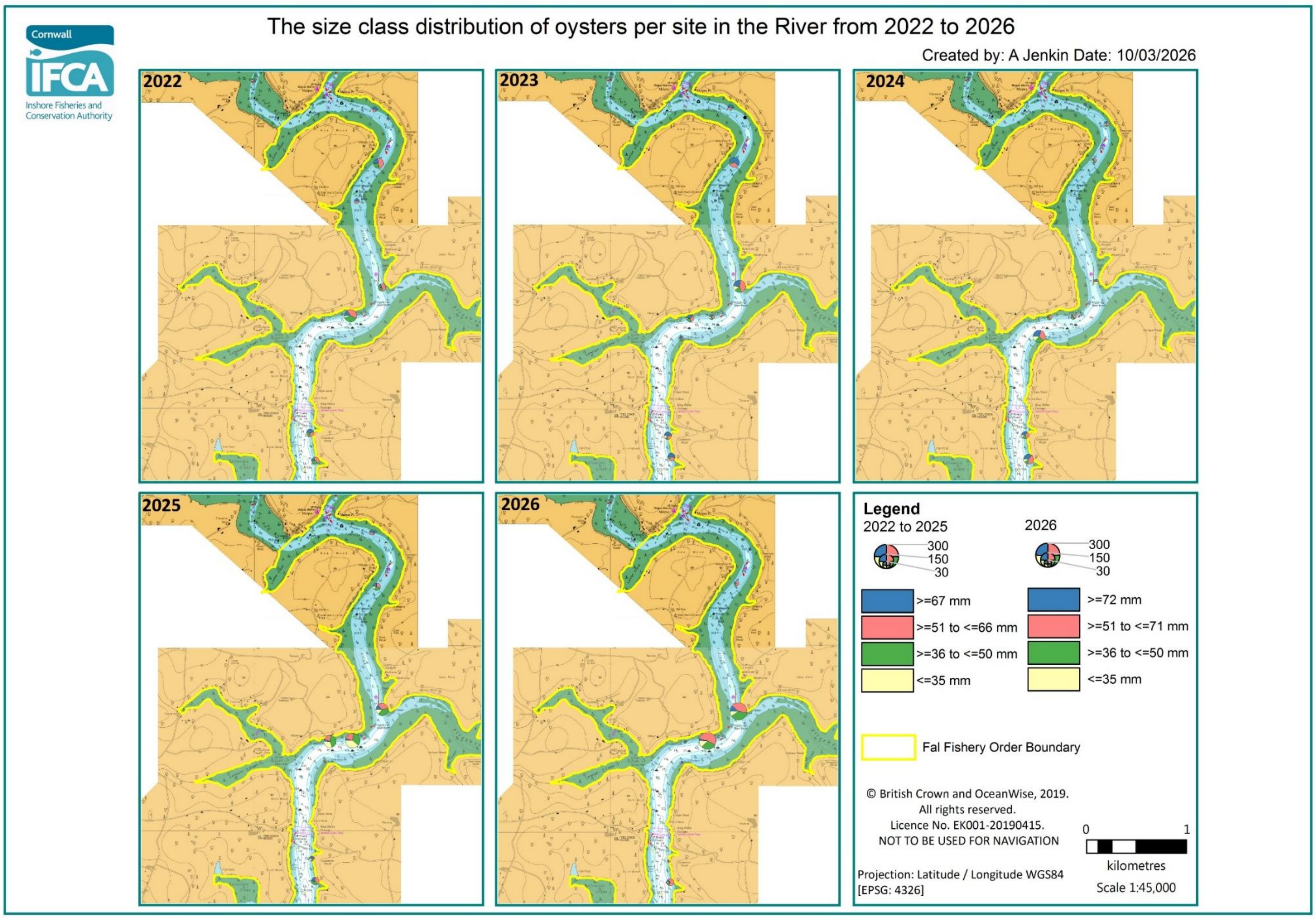

Figure 16: The composition of size classes (≥67 mm, ≥51 to ≤66 mm, ≥36 to ≤50 mm and ≤35 mm) of native oysters (*Ostrea edulis*) per survey station within Area C from 2022 to 2026.

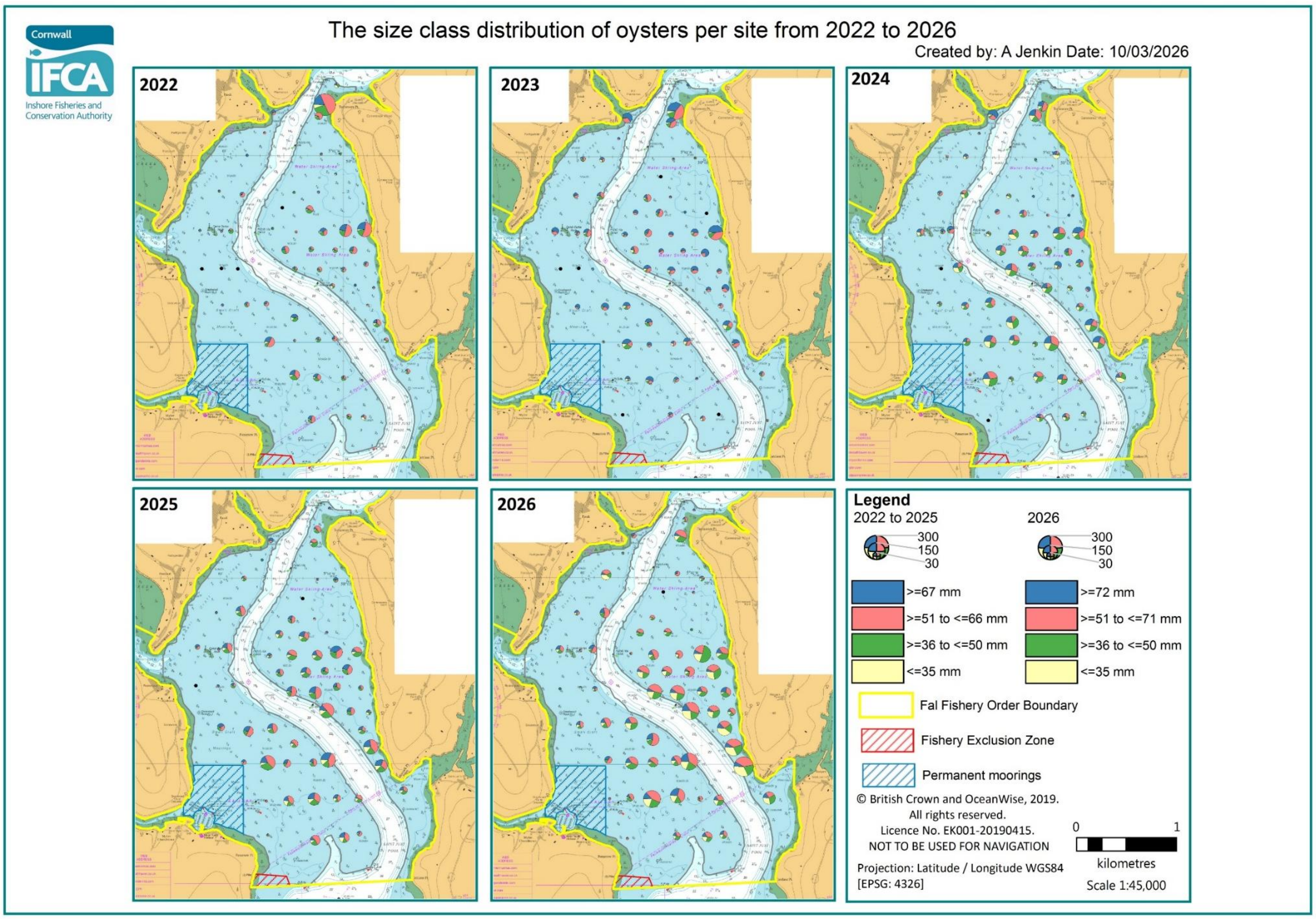

Figure 17: The composition of size classes (≥67 mm, ≥51 to ≤66 mm, ≥36 to ≤50 mm and ≤35 mm) of native oysters (*Ostrea edulis*) per survey station within Areas A and B from 2022 to 2026.

Native oysters (*O. edulis*) – Weight (g)

The total number of oysters able to be weighed increased markedly in 2026, reaching 2,095 individuals, the highest across the five-year period (Table 2). The average weight (g) of all oysters declined from a peak in 2023 (55.2 g) to the lowest value in 2026 (41.3 g). When considering oysters above the minimum size (≥67 mm from 2022 to 2025 and ≥72 mm in 2026), the average weights are presented for reference (Table 2) but are not directly comparable across years due the change in size.

Table 2: The number of native oysters (*Ostrea edulis*) weighed and the average weight of native oysters (g) ±standard error and number of oysters weighed and the average weight of native oysters (g) over the minimum size (≥67 mm from 2022 to 2025 and ≥72 mm in 2026) ±standard error from 2022 to 2026.

Year	Number of native oysters weighed	Average weight (g) of native oysters	Number of oysters ≥67 mm weighed	Average weight (g) of oysters ≥67 mm	Number of oysters ≥72 mm weighed	Average weight (g) of oysters ≥72 mm
2026	2,095	41.3 ± 0.7	-	-	496	80.6 ± 0.4
2025	1,307	46.6 ± 1.0	509	76.5 ± 1.7	-	-
2024	1,495	49.8 ± 1.0	743	75.2 ± 1.3	-	-
2023	1,491	55.2 ± 0.9	827	72.7 ± 1.2	-	-
2022	1,135	45.8 ± 1.1	395	80.6 ± 2.0	-	-

Median and mean weights remained relatively similar across the five years, with values clustered around 40 to 60 g (Figure 18). The interquartile ranges showed little variation between years, indicating a relatively stable weight. All years displayed numerous high-weight outliers, particularly in the 2026 dataset with one obvious outlier. Overall, the data shows consistent oyster weight distributions over time, with year-to-year differences occurring mainly in the number of higher weight individuals.

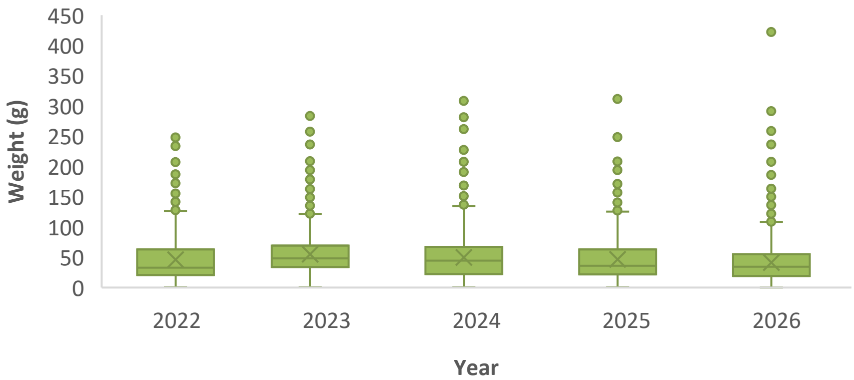

Figure 18: Weight (g) distribution for all native oysters (*Ostrea edulis*) from 2022 to 2026. Data is grouped by year. X represents the mean, the horizontal line represents the median, boxes represent the interquartile range, whiskers represent 1.5* interquartile range, and the filled circles represent outliers.

For the ≤35 mm and ≥36–≤50 mm size classes, average weight increased slightly between 2022 and 2023 before declining in 2024 (Figure 19). Average weights subsequently fluctuated, but by 2026 remained below the higher values recorded in 2022–2023 (Figure 19). The ≥51–≤66 mm / ≥51–≤71 mm size class showed a similar pattern, with a small decline in 2024. The largest oysters (≥67 mm / ≥72 mm) were generally stable, aside from a slight decrease in 2023 and a slight increase in 2026 (likely reflecting the marginally larger size of oysters being measured). Overall, the figure shows modest fluctuations in average weight across all size classes, with no clear directional trend.

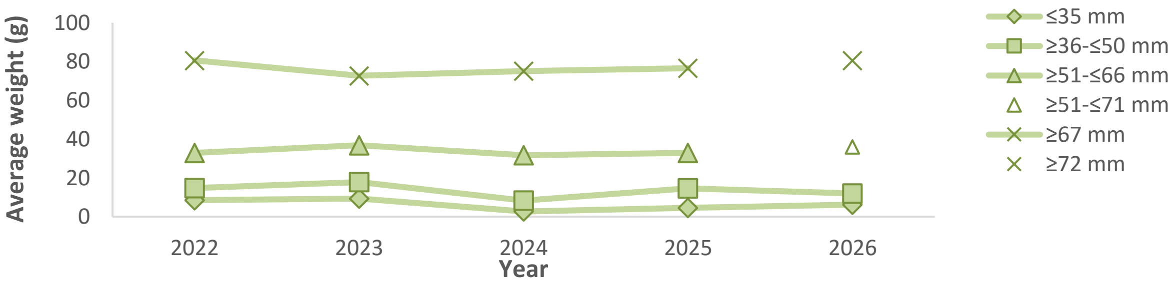

Figure 19: The average weight (g) of oysters per size class from 2022 to 2026. Size classes were updated in 2026 to reflect changes to the minimum size.

Native oysters (*O. edulis*) – Weight (g)

The length–weight relationship of oysters from 2022 to 2026 is shown in Figure 20, with a polynomial (order 2) trendline fitted for each year to reflect the non-linear pattern of growth typically observed in oysters, whereby weight increases more rapidly with increasing shell length. The fitted equations show annual variation in coefficients, indicating subtle differences in length–weight relationships between years. One outlier was excluded from the regression analysis (12.3 cm, 422.2 g in 2026).

Across all years, weight increased non-linearly with length, with heavier oysters generally occurring above approximately 8–10 cm. The strength of the fitted relationships varied between years, with R^2 values ranging from approximately 0.67 in 2023 to 0.78–0.79 in 2022 and 2024. Higher R^2 values indicate a stronger fit and reduced scatter around the fitted curve, whereas the lower value observed in 2023 reflects greater variability in weight for a given shell length.

Although the polynomial curves follow a similar overall pattern across years, differences in curvature and fit suggest modest interannual variation in growth characteristics. The steepest fitted relationship was observed in 2022, while the 2026 curve was broadly comparable to those obtained in 2023 and 2024. In contrast, the flatter curve observed in 2025 indicates comparatively lower weights at equivalent shell lengths. Overall, the results demonstrate consistent non-linear growth across the time series, with annual variability primarily reflecting differences in the rate at which weight increases with shell length rather than a fundamental shift in the length–weight relationship.

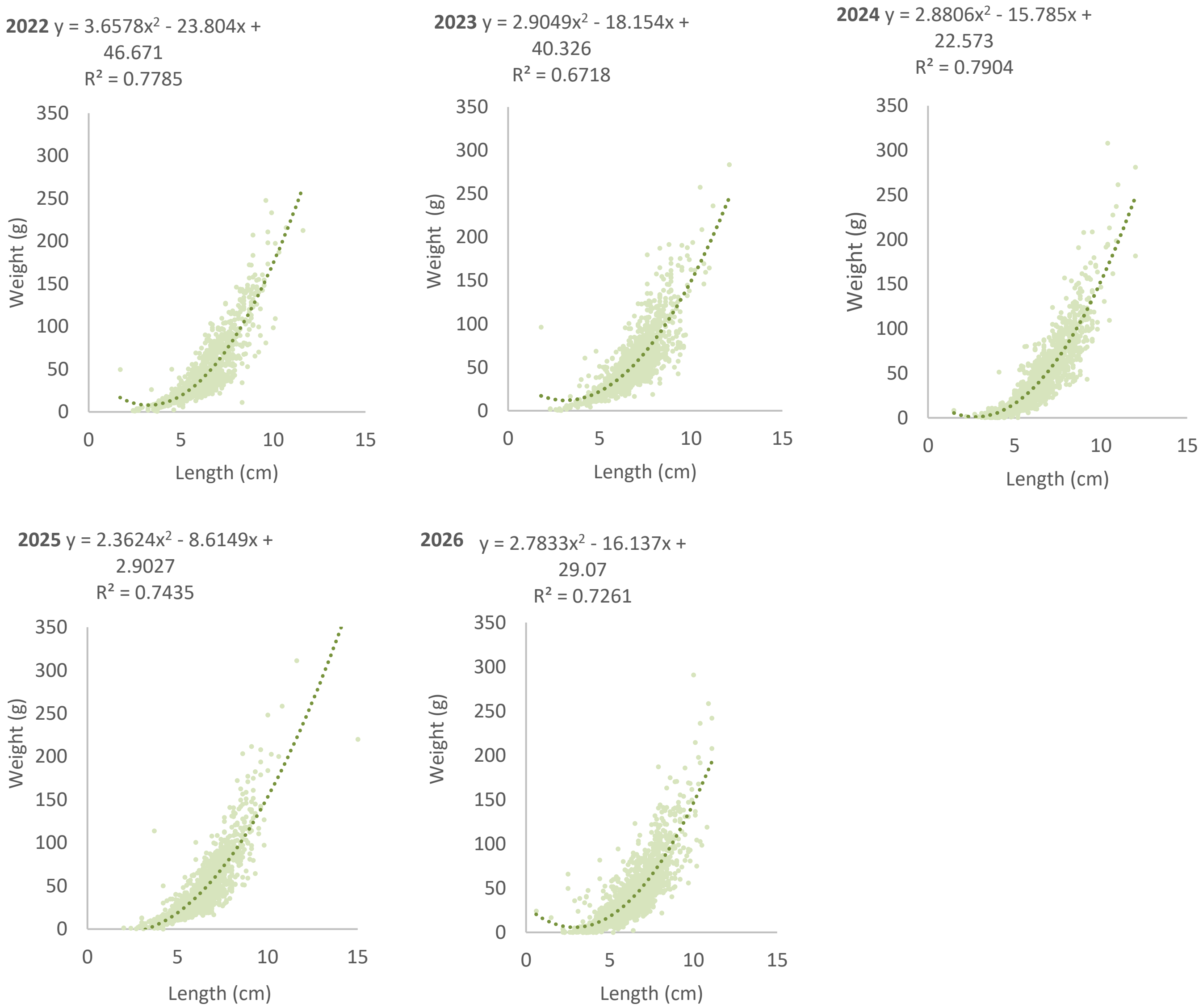

Figure 20: Length (cm) Weight (g) plot for all native oysters (*Ostrea edulis*) both measured and weighed from 2022 to 2026.

Queen scallop (*A. opercularis and M. varia*) – Number of scallops

Queen scallops

In total, 2,156 scallops were measured and recorded in 2026, a marked decline since 2022 (3,708 individuals) (Table 3). The highest mean number of scallops per site occurred in 2022 (45.8 per site), falling to a low in 2025 (13.9) before rising again in 2026 (26.6). The largest negative annual change was recorded between 2024 and 2025 (–1,834 scallops; –61.9 %), while the greatest positive change occurred between 2025 and 2026 (+1,027 scallops; +90.97 %). Overall, the table shows a declining trend from 2022 to 2025, followed by a partial recovery in 2026.

Table 3: Summary of survey data and the number of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) recorded during the Fal oyster survey between 2022 and 2026. **difference from 2021*

Year	Number of sites sampled	Number of scallops	Average number of scallops per site	Difference from previous year (number of scallops)	Percentage difference from previous year
2026	81	2,156	26.6	+1027	+90.97%
2025	81	1,129	13.9	-1834	-61.90 %
2024	81	2,963	36.6	-202	-6.38 %
2023	81	3,165	39.1	-543	-14.64 %
2022	81	3,708	45.8	*+1129	*43.78 %

All three areas displayed a declining trend from 2022 to 2025, with densities reaching their lowest point in 2025 (Figure 21). In 2026, densities increased slightly in all areas, although not returning to previous levels. Area A consistently recorded the highest densities, while Area C remained the lowest throughout the time series.

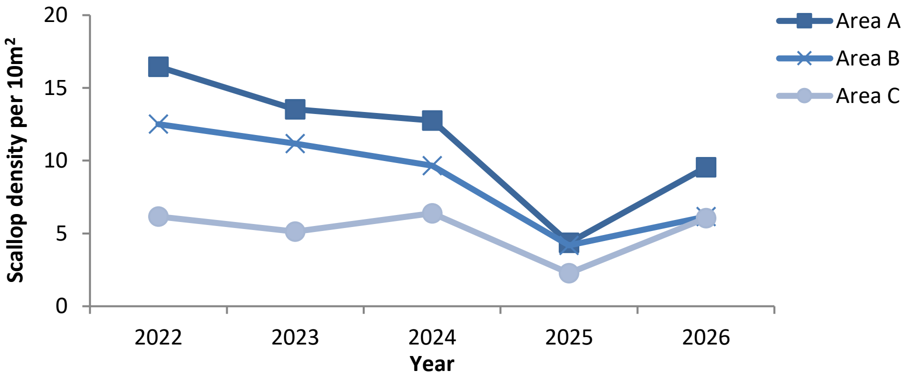

Figure 21: The density of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) per 10 m² for the surveyed (dredged) area within each management areas (Areas A, B and C) from 2022 to 2026.

Densities of larger scallops (≥40 mm) generally declined across all areas from 2022, reaching lowest levels around 2025, with some series remaining low or declining slightly further into 2026 (Figure 22). A slight increase in 2026 was evident for the ≥40–≤59 mm size class in Areas A and C, while ≥60 mm scallops showed a small increase only in Area C. Densities of ≥20–≤39 mm scallops remained relatively low throughout, with minor increases at intermittent points, followed by a small increase across all areas in 2026. In contrast, ≤19 mm scallops increased markedly in 2026 across all areas following an increase in 2024. Overall, densities of larger scallops declined, while the smallest size class increased, with the most pronounced changes observed in Areas A and B; Area C remained consistently low.

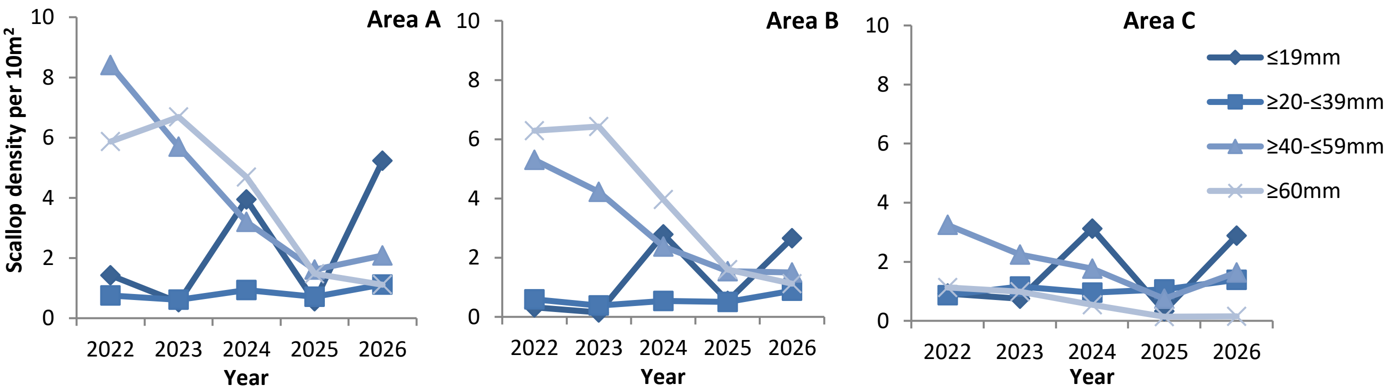

Figure 22: The density of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) per 10 m² for the surveyed (dredged) area within each management area (Areas A, B and C) from 2022 to 2026, shown by size class.

Queen scallop (*A. opercularis and M. varia)* – Spatial distribution of scallop densities

In the Upper River (Area C), the distribution density for the total number of scallops/ 10 m^2 appeared to decrease overall from 2022 to 2026, with lower densities recorded in 2024 and 2025 and a slight increase in 2026 (Figure 23). In Areas A and B, scallop densities decreased over the time series, with the moderate-density sites observed in 2022 and 2023 largely absent by 2024 and 2025. In 2026, a localised increase in density occurred, primarily on the upper North Bank (roughly corresponding to Area A), representing a shift from the earlier high-density areas that were previously concentrated further south (Figure 24). Despite this localised increase, most sites remained within the lower density categories in 2026.

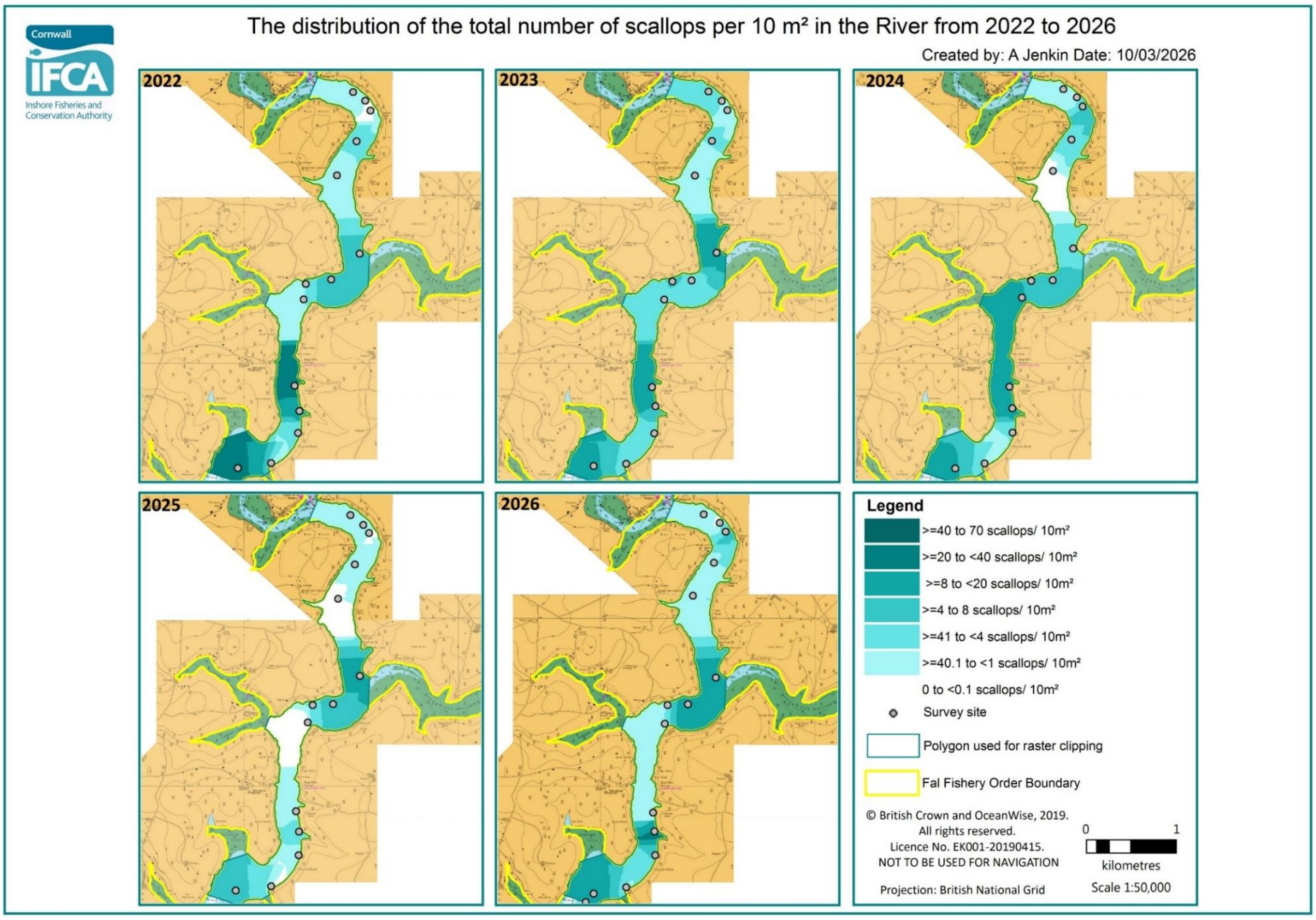

Figure 23: Spatial distribution of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) density; number per 10 m^2 recorded in the Upper River geographic area (within Area C) from 2022 to 2026.

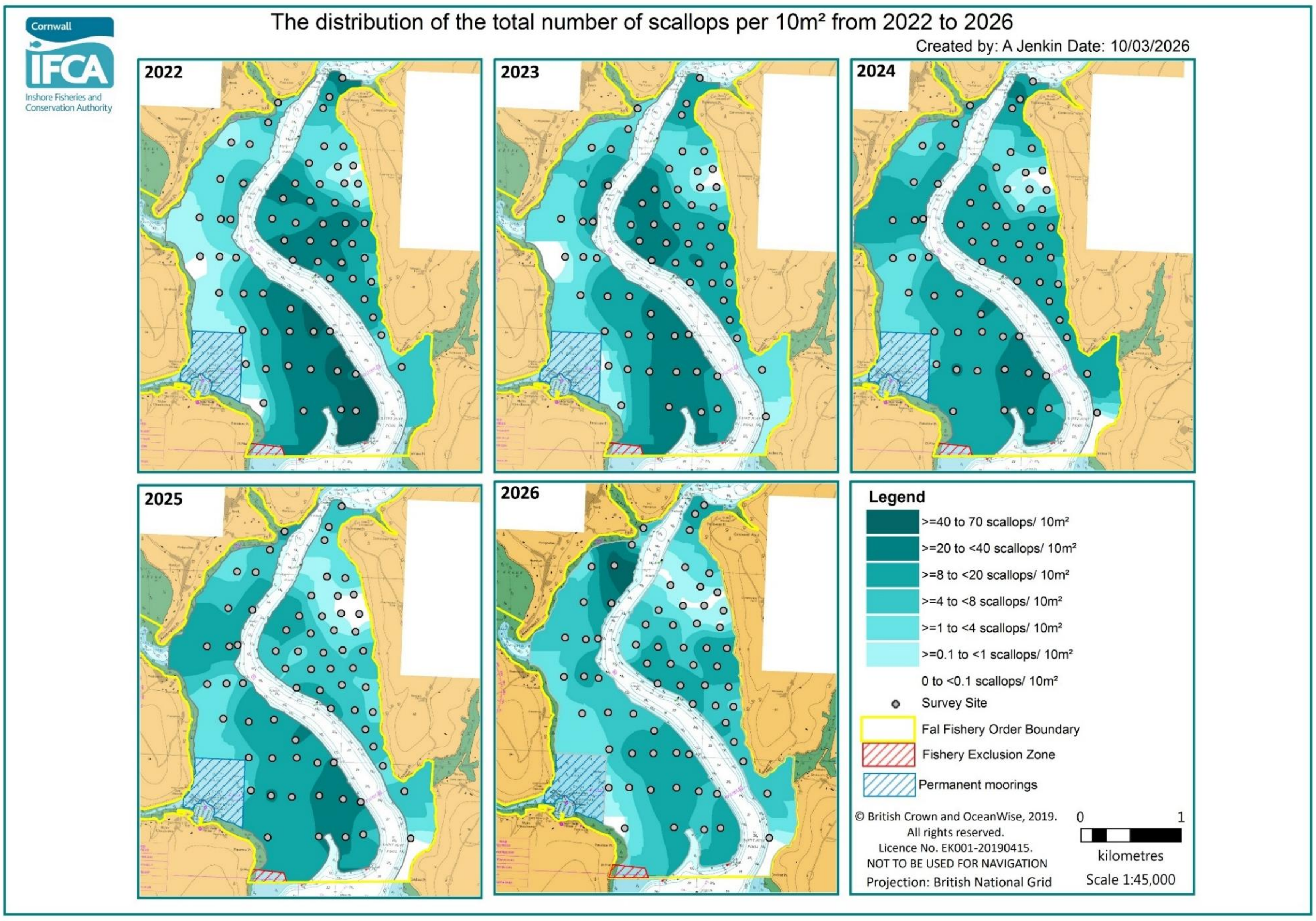

Figure 24: Spatial distribution of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) density; number per 10 m^2 recorded in the North Bank and East Bank geographic areas (roughly corresponding to Areas A and B, respectively) from 2022 to 2026.

Queen scallop (*A. opercularis and M. varia*) – Spatial distribution of scallop densities

The distribution of large scallops (≥60 mm) density showed a decline from 2022 to 2026 in both the Upper River (Area C) (Figure 25) and Areas A and B (Figure 26). In the Upper River (Area C), large scallops were present at very low densities throughout the time series, appearing at a small number of isolated sites in 2022 and 2023 before becoming almost absent by 2025 to 2026. Large scallops were relatively widespread in 2022 and 2023, on both the North Bank and East Bank (roughly corresponding to Areas A and B, respectively) with several sites supporting moderate densities. However, from 2024 onwards, the density declined. By 2025 and 2026, large scallops were restricted to fewer locations and occurred mostly at low densities. Overall, the spatial patterns indicate a marked reduction in both the extent and density of large scallops over the five-year period

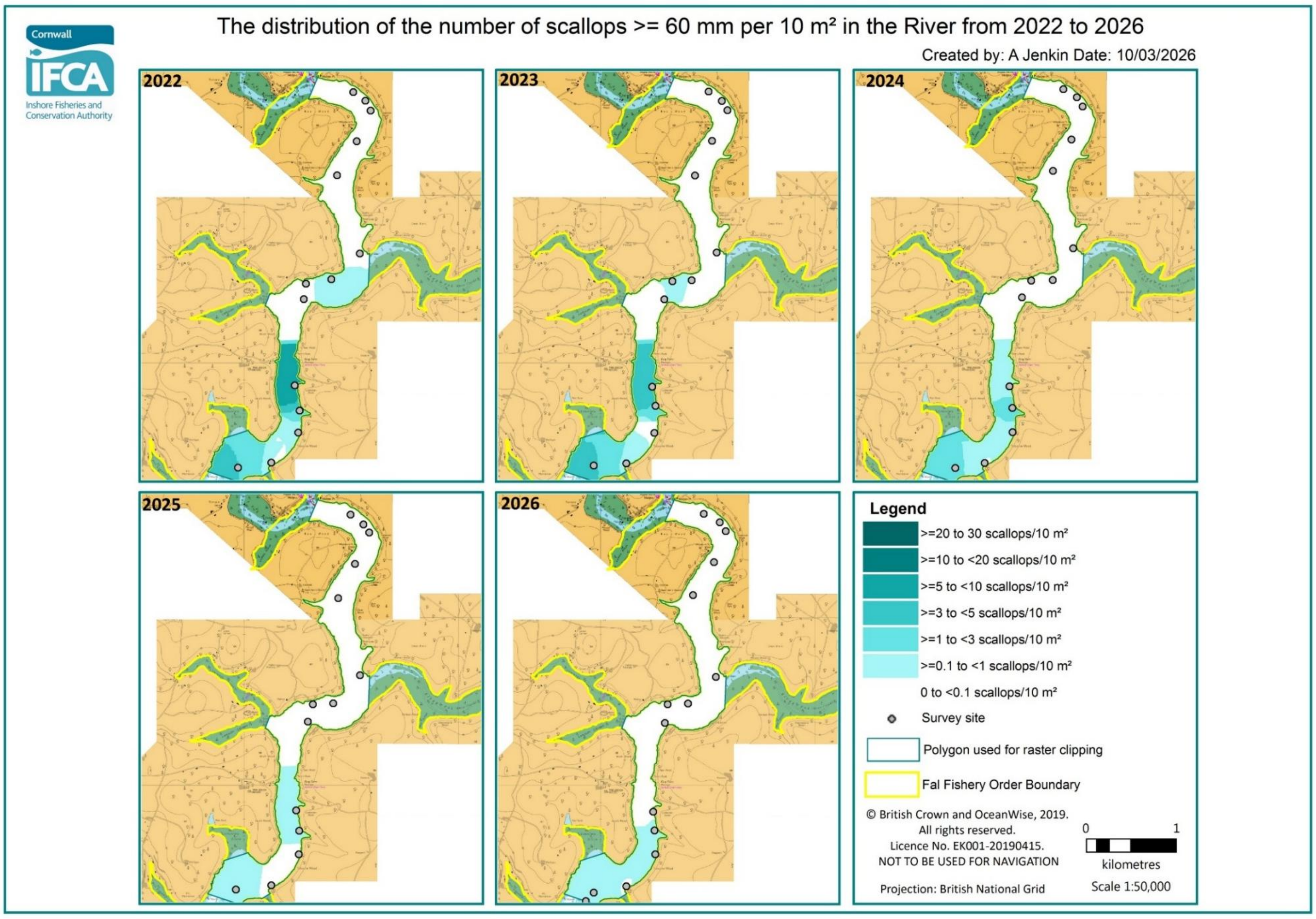

Figure 25: Spatial distribution of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) density, individuals ≥60 mm; number per 10 m², recorded in the Upper River geographic area (within Area C) from 2022 to 2026.

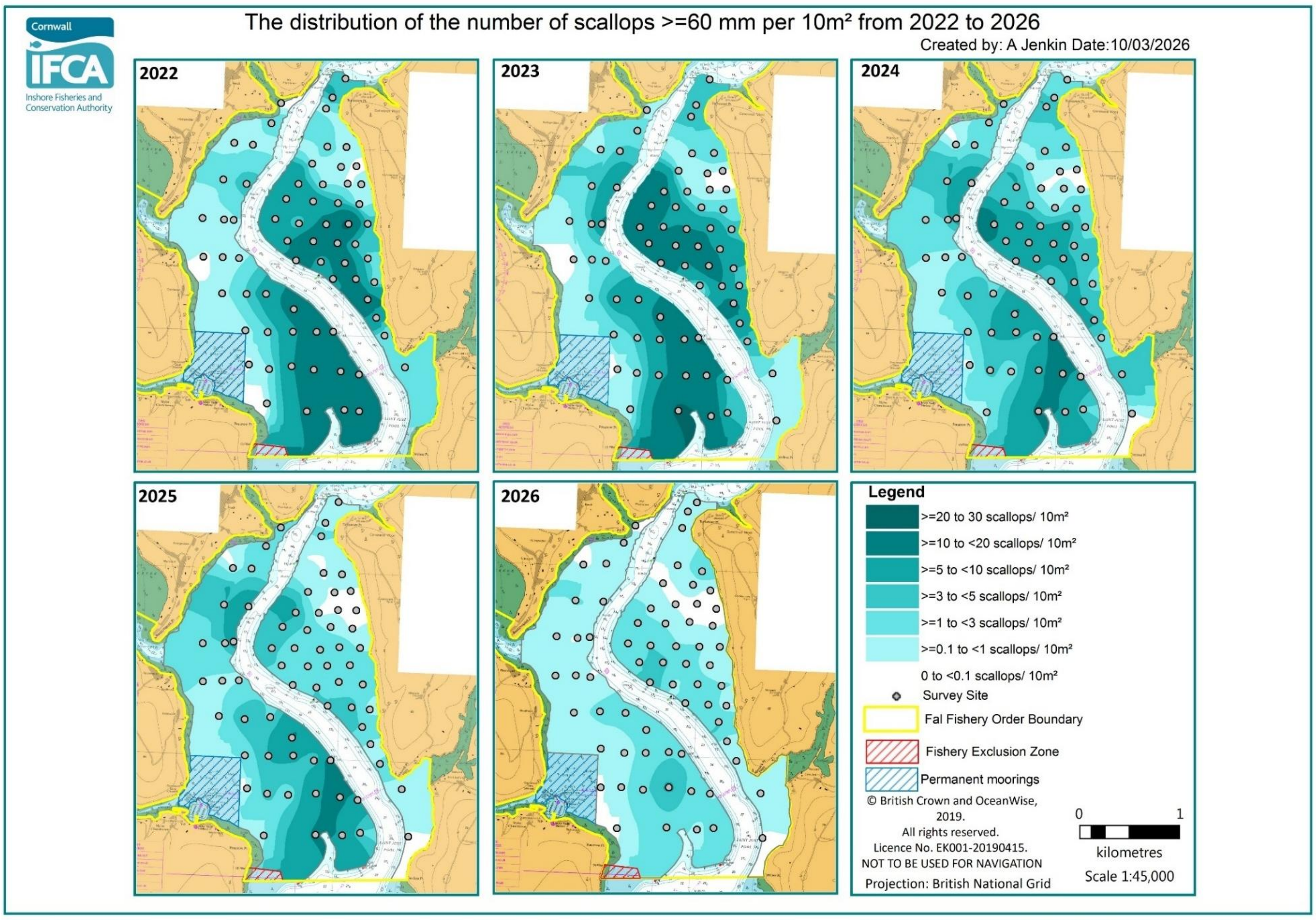

Figure 26: Spatial distribution of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) density; individuals ≥60 mm; number per 10 m², recorded in the North Bank and East Bank geographic areas (roughly corresponding to Areas A and B, respectively) from 2022 to 2026

Queen scallop (*A. opercularis and M. varia*) – Spatial distribution of scallop densities

The distribution of density for small scallops (≤19 mm) across the Fal Oyster Fishery from 2022 to 2026 showed consistently low densities in the Upper River (Area C), with a slight increase in 2026 (Figure 27). In Areas A and B, densities were low in 2022 and 2023, before increasing in 2024 and remaining at broadly similar levels through 2025 and 2026 (Figure 28). In 2026, densities were broadly similar to those observed in 2024, with the emergence of a localised higher-density hotspot on the upper North Bank (roughly corresponding to Area A) which has not been observed previously. Overall, the plots indicate fluctuating densities of small scallops across Areas A and B, with no consistent trend, while Area C remained consistently sparse.

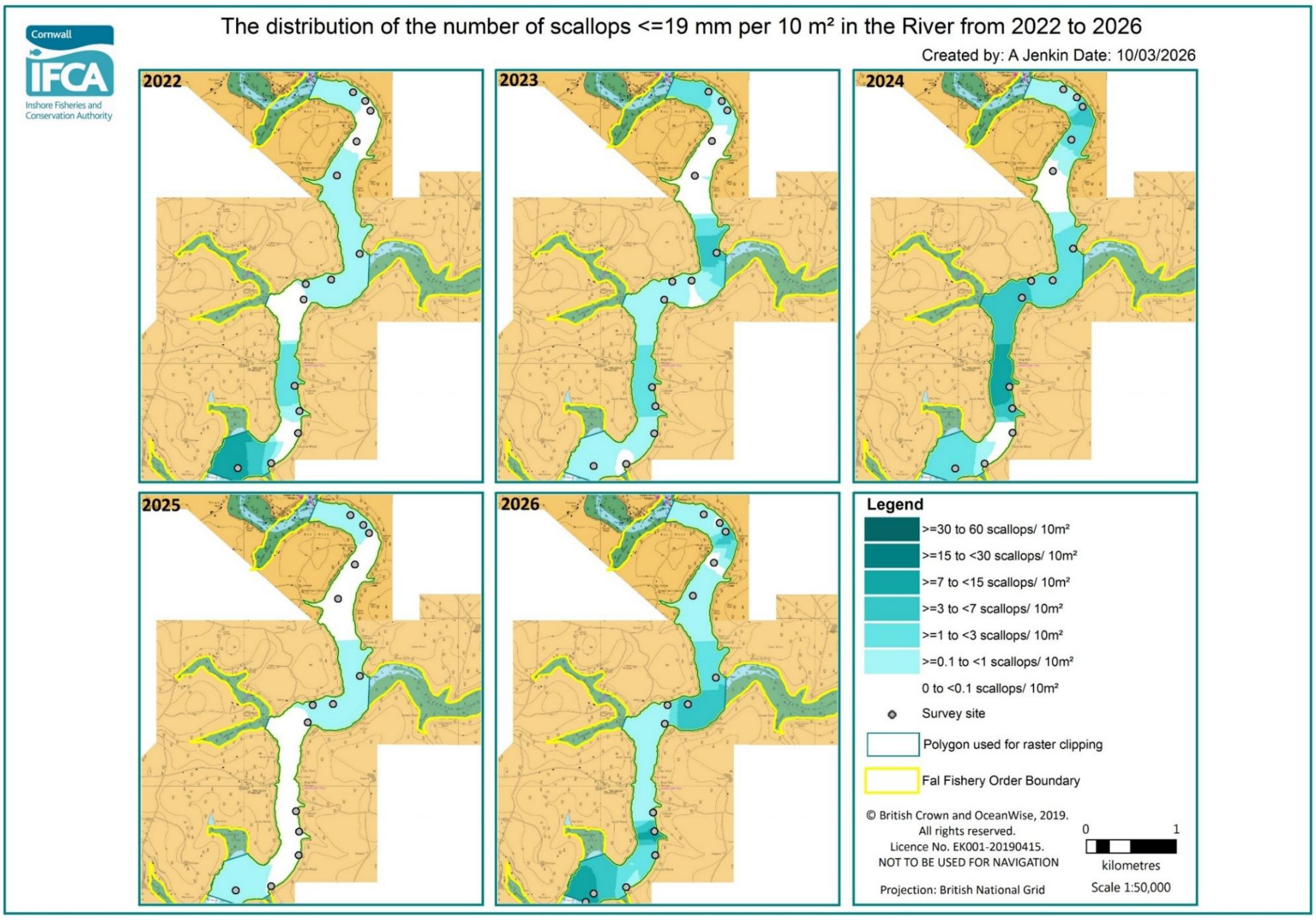

Figure 27: Spatial distribution of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) density, individuals ≤19 mm; number per 10 m² recorded in the Upper River geographic area (within Area C) from 2022 to 2026

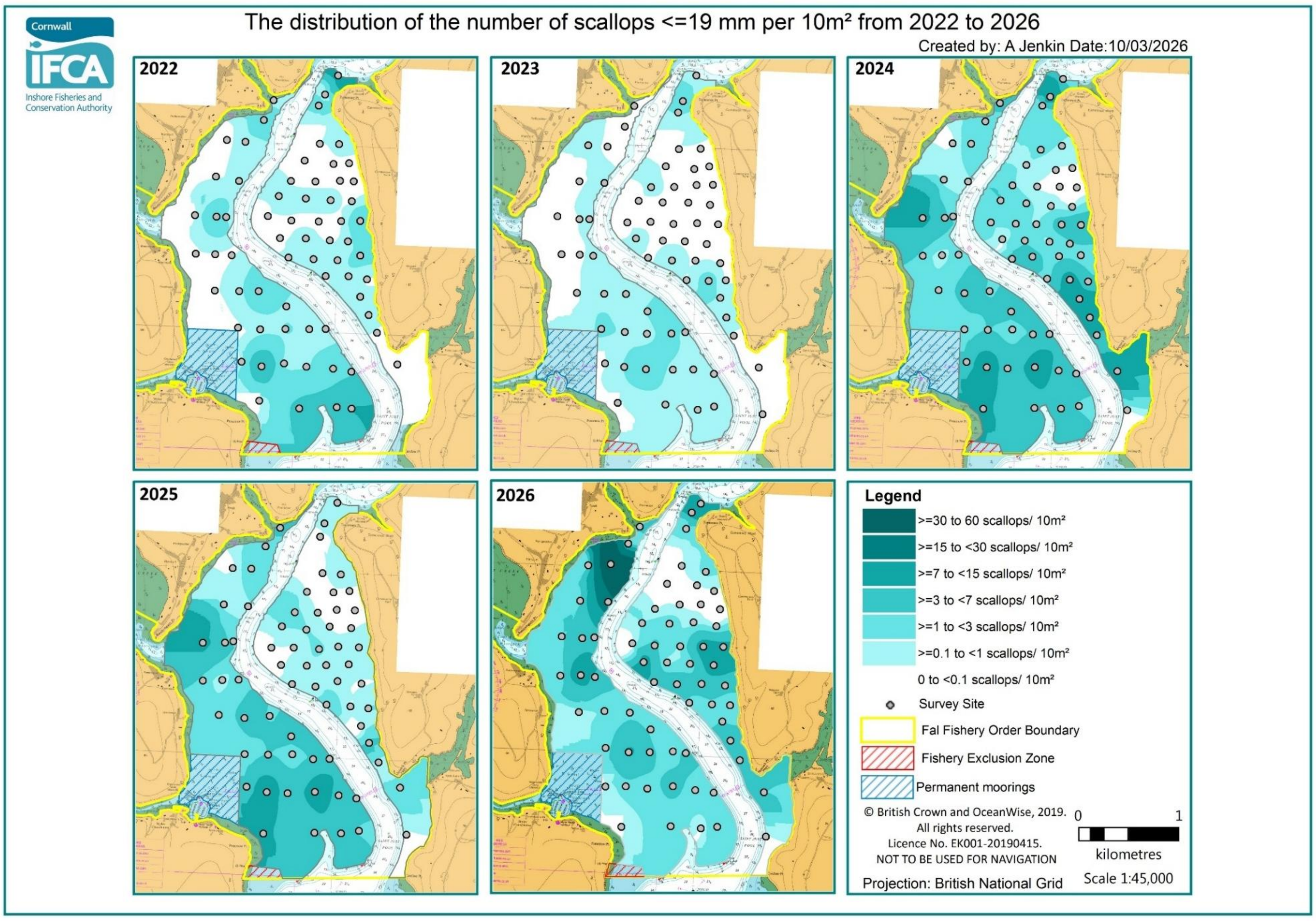

Figure 28: Spatial distribution of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) density, individuals ≤19 mm; number per 10 m² recorded in the North Bank and East Bank geographic areas (roughly corresponding to Areas A and B, respectively) from 2022 to 2026.

Queen scallop (*A. opercularis and M. varia*) – Size class distribution

Across the five-year period, scallop lengths shifted from a population dominated by larger individuals in 2022–2023 to a more variable size structure in later years (Figure 29). The average size (mm) peaked in 2023, before decreasing in 2024 alongside a noticeable increase in size variability. This pattern continued into 2026, where a higher proportion of smaller scallops decreased the average size, despite some larger individuals still being present. Outliers were evident in 2022 and 2023, with numerous small individuals and only occasional larger scallops in 2023. Sizes appear to stabilise slightly in 2025 before becoming more variable again in 2026. Overall, the data showed a shift towards a more variable population structure from 2024 onwards, driven by an increased proportion of smaller scallops.

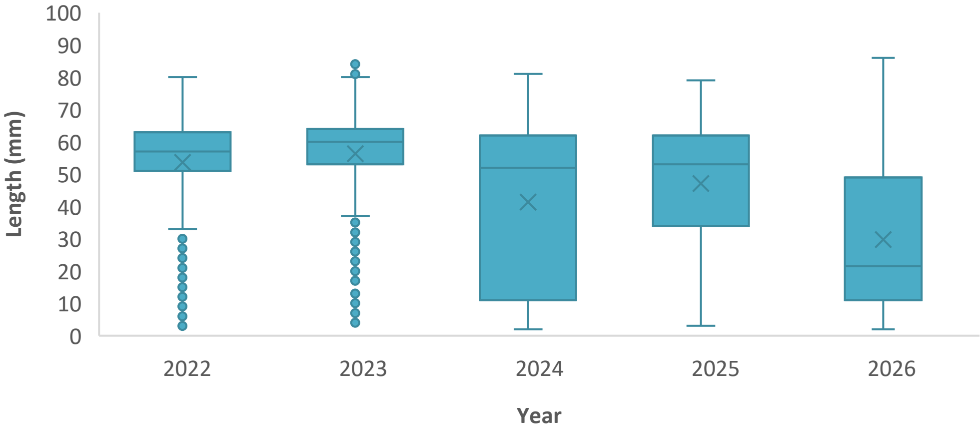

Figure 29: Length distribution plot for all queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) from 2022 to 2026. Data is grouped by year. X represents the mean, the horizontal line represents the median, boxes represent the interquartile range, whiskers represent 1.5* interquartile range, and the filled circles represent outliers.

In 2022 and 2023, the majority of scallops fell within the ≥40–≤59 mm and ≥60 mm size classes, with only a small proportion of smaller individuals (Figure 30). In 2024, the distribution shifted, with a noticeably higher proportion of smaller scallops (≤19 mm and ≥20–≤39 mm). In 2025, mid-sized scallops (≥40–≤59 mm) became dominant, with fewer small scallops than in 2024. By 2026, smaller scallops (≤19 mm and ≥20–≤39 mm), again formed a substantial portion, with 49% ≤19 mm, while the largest size class, (13% ≥60 mm) was reduced relative to earlier years. Overall, the figure showed a clear shift away from the larger size classes that dominated in 2022–2023 and towards a size structure increasingly composed of smaller scallops in 2024 and 2026.

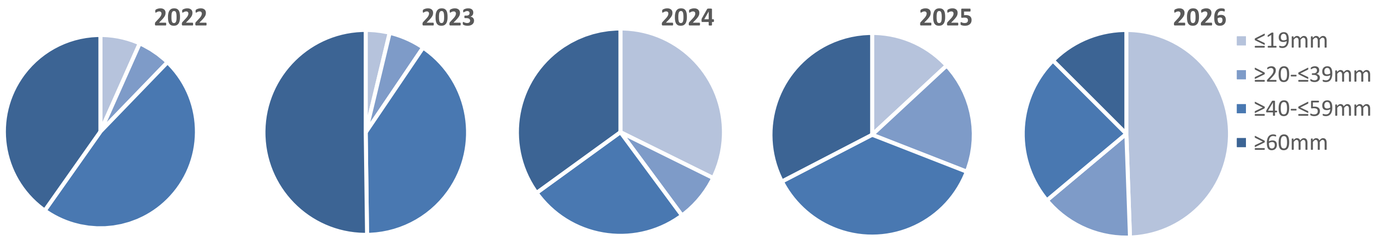

Figure 30: The percentage of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) per size class (≥60 mm, ≥40-≤59 mm, ≥20-≤39 mm and ≤19 mm) from 2022 to 2026.

The Minimum Conservation Reference Size (MCRS) for queen scallops (*Chlamys* spp.) is 40 mm. Despite the MCRS not applying in practice to vessels targeting the fishery, as these vessels are not currently registered or licensed, it was felt that it was appropriate to analyse the data in respect of the MCRS. In all three areas, scallops ≥40 mm consistently made up the majority of the population between 2022 and 2023 (Figure 31). This pattern continued in Areas A and B until 2025, after which the proportion of larger scallops declined sharply in 2026. In Area C, a shift towards smaller scallops occurred earlier, with individuals <40 mm becoming more prominent from 2024 onwards. Overall, the data showed that while larger scallops dominated in the early years of the series, there was a clear move towards higher proportions of smaller scallops in 2026 in Areas A and B, and from 2024 in Area C.

Queen scallop (*A. opercularis and M. varia*) – Size class distribution

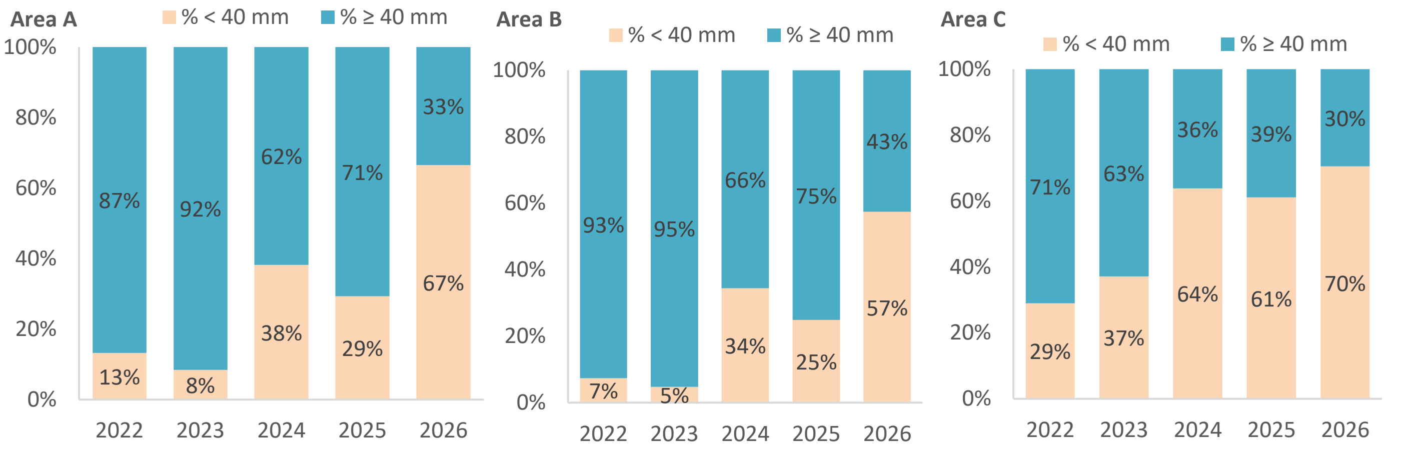

Figure 31: The percentage (%) of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) over and under the minimum conservation reference size (40 mm) for all three management areas (Area A, B and C) of the Fal oyster survey area from 2022 to 2026.

Queen scallop (*A. opercularis and M. varia)* – Size class composition

The size-class distribution of scallops from 2022 to 2026 shows consistently low densities in Area C (Figure 32) and more variable patterns across Areas A and B (Figure 33). In Area C, scallops occurred in small numbers yearly, with the population changing from larger individuals in 2022 through to smaller individuals in 2026. In Areas A and B, scallops were widespread in 2022 and 2023 and were dominated by medium to larger size classes, primarily ≥49–≤59 mm and ≥60 mm individuals. From 2024 onwards, both the number of sites containing scallops and the proportion of these larger size classes declined substantially, resulting in a more even spread across smaller and mid-sized classes. By 2025 and 2026, scallops were present at fewer sites and were largely represented by small to medium sized individuals. However, the increase in smaller scallops (≤19 mm) at several locations in 2026 suggests early signs of new recruitment. Overall, the data indicates a decline in scallop abundance and a change in size class composition since 2022, but the emergence of more small scallops in 2026 provides optimism for the future population.

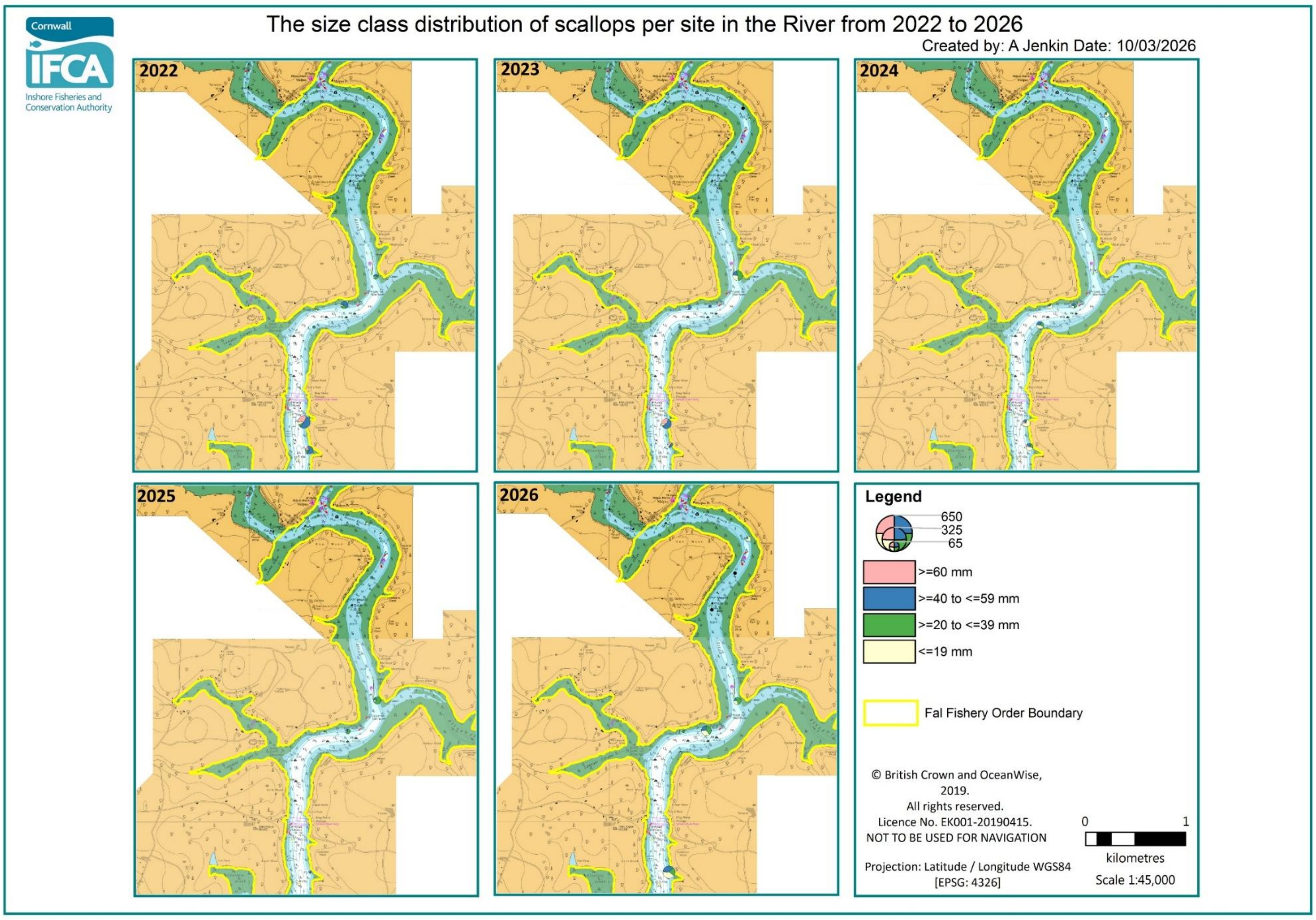

Figure 32: The size composition and distribution of size classes (≥60 mm, ≥40-≤59 mm, ≥20-≤39 mm and ≤19 mm) of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) for each site within Area C from the 2022 to 2026.

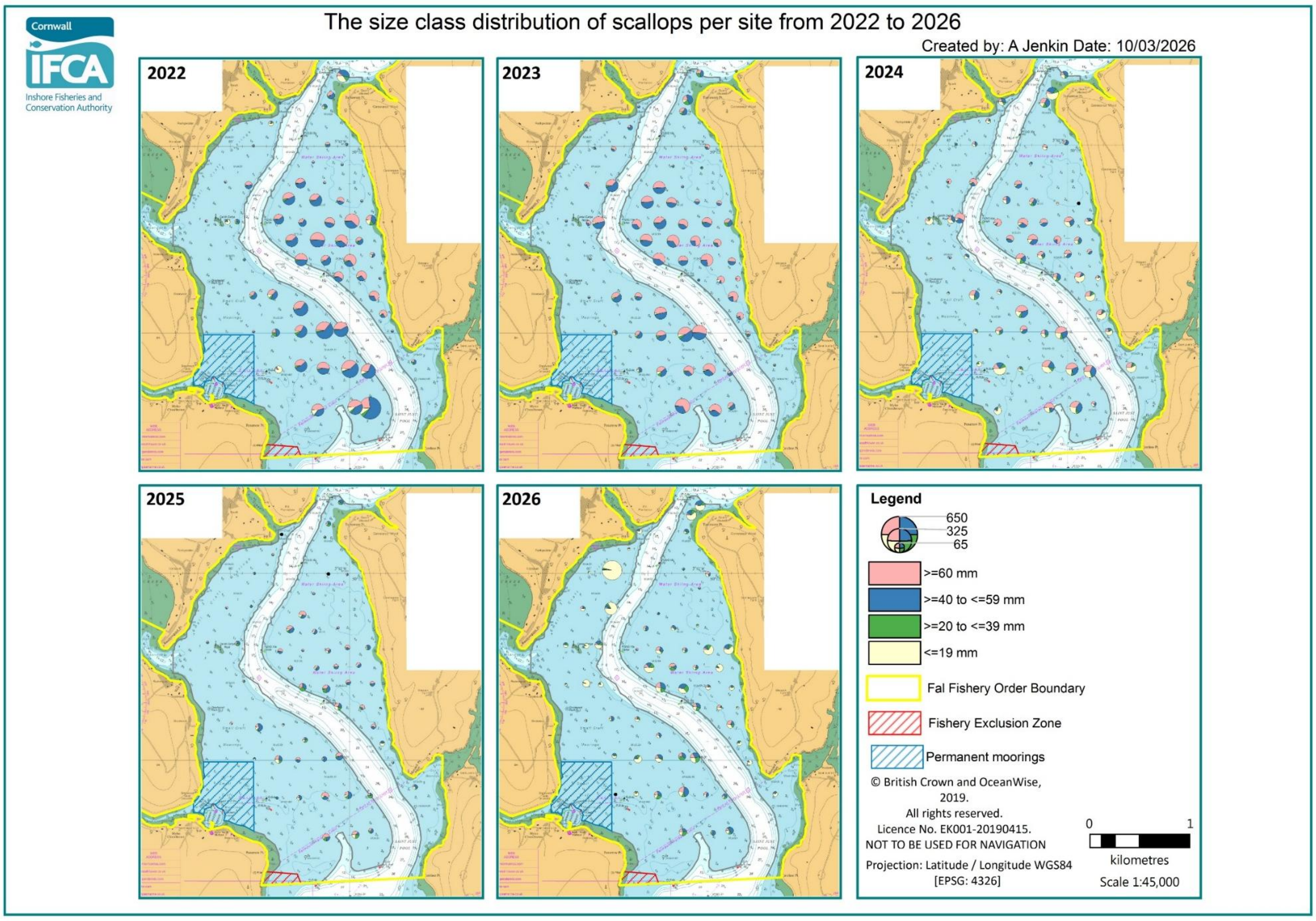

Figure 33: The size composition and distribution of size classes (≥60 mm, ≥40-≤59 mm, ≥20-≤39 mm and ≤19 mm) of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) for each site within Areas A and B from 2022 to 2026.

Bycatch, non-natives and dredge composition

Non-native species

Two non-native species were recorded during the 2026 survey, slipper limpets (*Crepidula fornicata)* and three leathery sea squirts (*Styela clava*). The total number of slipper limpets decreased overall from 4,507 individuals in 2022 to 2,333 in 2026 (Table 4). Although numbers declined year-on-year for most of the period, a slight increase was observed between 2025 and 2026 in Areas B and C, while Area A showed a small decline. All three areas generally followed this overall downward trend, with minor variation in the final year. Overall, the data indicates a sustained reduction in slipper limpet numbers across the entire survey area over the five-year period. The distribution of density plots confirm this downward trend with a sustained decrease in slipper limpet abundance from 2022 to 2026 in all areas, with high-density areas remaining limited to the Upper River (within Area C) (Figure 34 and Figure 35). All non-native species recorded during the survey were kept onboard, removed from the fishery and were collected privately to be used as soil improver.

Table 4: Summary of survey data and the number of slipper limpets (*Crepidula fornicata*) recorded during the Fal oyster survey between 2022 and 2026

Year	Number of sites	Number of slipper limpets	Area A	Area B	Area C
2026	81	2,333	415	568	1350
2025	81	2,063	575	509	979
2024	81	3,384	1,278	942	1,164
2023	81	3,410	1,542	1,068	800
2022	81	4,507	1,459	991	2,057

Dredge composition

The percentage volume of each dredge and the distribution of mud, shell (live and dead), weed, gravel, vegetation (sticks and leaves), dead maerl and stone as well as the number of live maerl fragments is shown for Areas A, B and C in 2026 in Figure 36. Live maerl was recorded at three sites; four fragments at one site and one fragment at the other two sites (Figure 36) and dead maerl was recorded at 10 sites.

Bycatch

Species caught as bycatch were present in all 81 dredge samples and included algae, Annelida, Arthropoda, Bryozoa, Chordata, Cnidaria, Echinoderms, Hydroida, Mollusca, Porifera and Tunicata. Due to the light footprint of the dredge and short tow durations, bycatch species were in good condition and returned alive to the water straight away (unless a non-native species). An increase in the number of Nudibranchs across the survey was observed.

Similar to previous years, the species of red algae, *Solieria chordalis,* was recorded in abundance at many sites (Figure 36), with a high abundance of red weed in a basin in the central part of East Bank (roughly corresponding to Area B) but it was also recorded in small quantities to the south and the north, around Turnaware.

Bycatch, non-natives and dredge composition

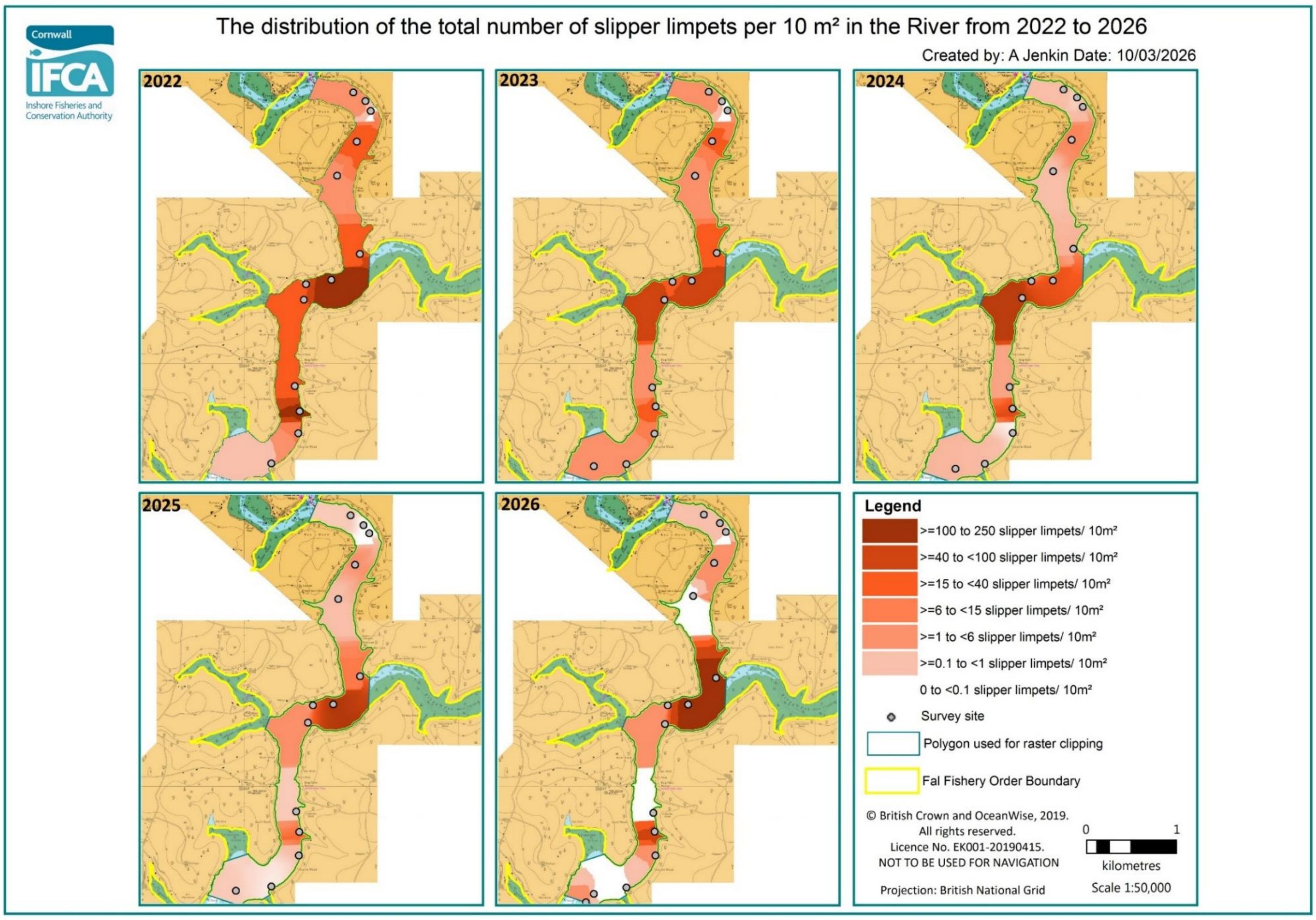

Figure 34: Spatial distribution of slipper limpet (*Crepidula fornicata*) density; number per 10 m[2] recorded in the Upper River geographic area (within Area C) from 2022 to 2026.

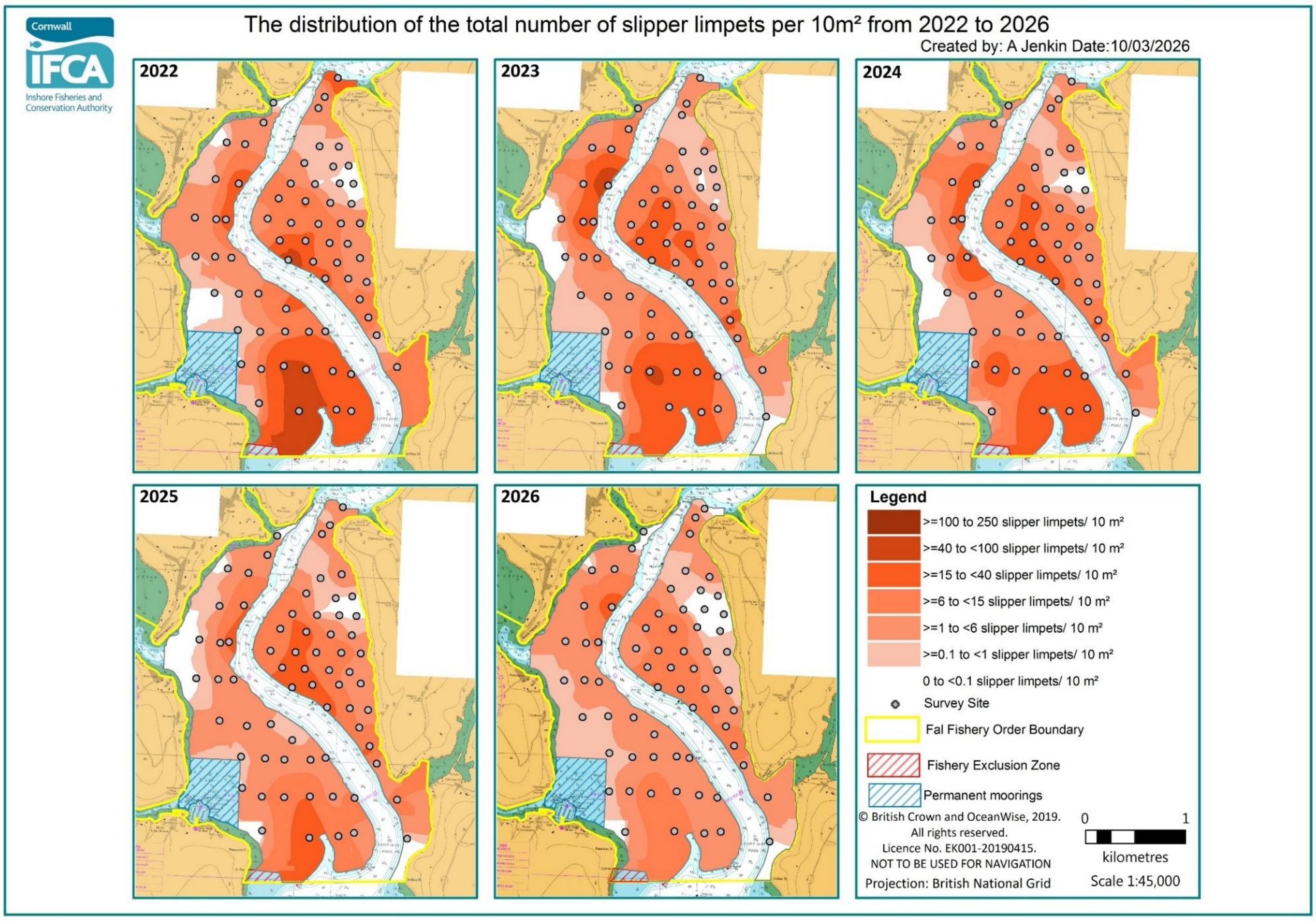

Figure 35: Spatial distribution of slipper limpet (*Crepidula fornicata*) density; number per 10 m[2] recorded in the North Bank and East Bank geographic areas (roughly corresponding to Areas A and B, respectively) from 2022 to 2026

Bycatch, non-natives and dredge composition

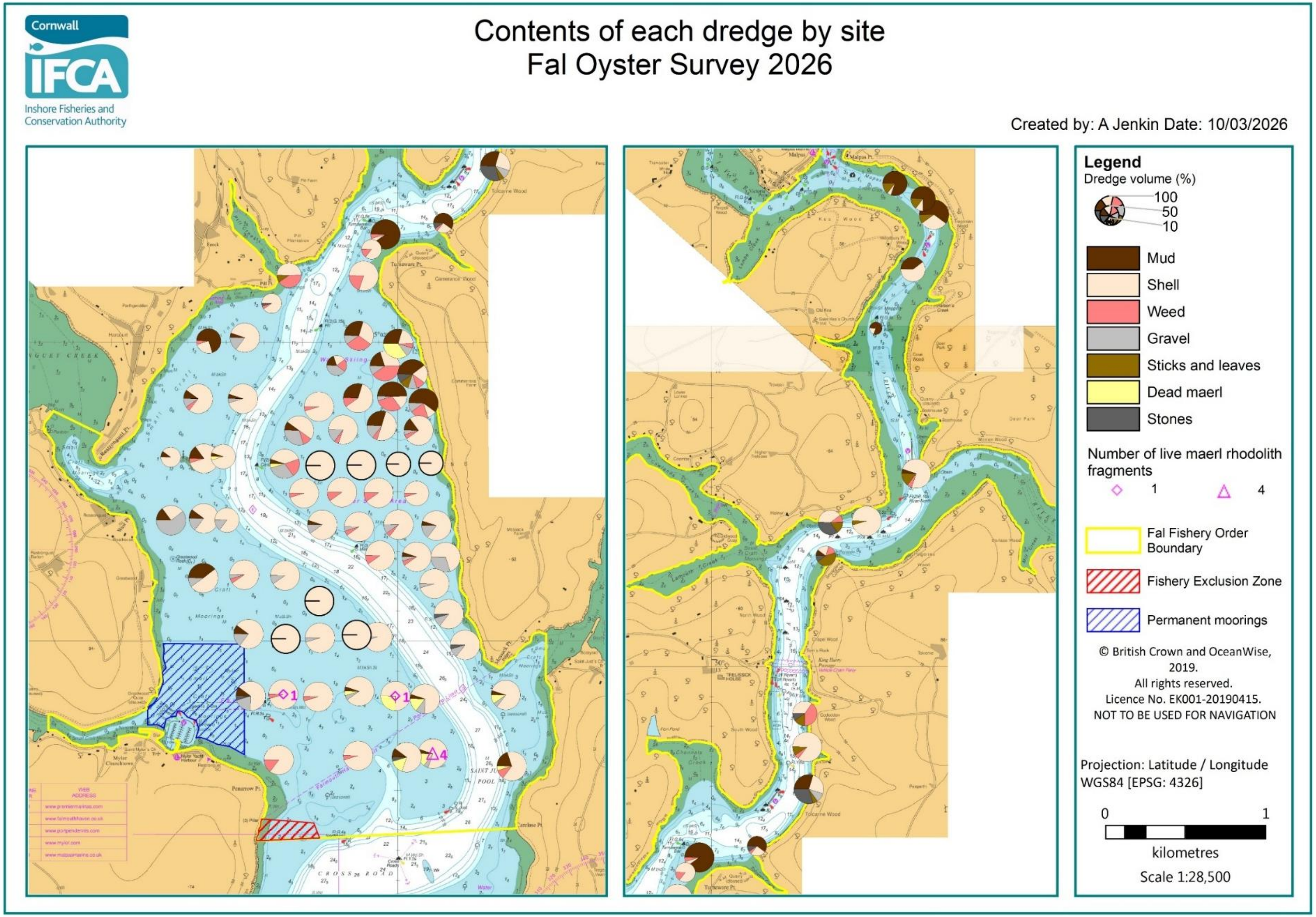

Figure 36: The dredge volume and the contents of each dredge per site recorded during the Fal Oyster Survey 2026.

Cornwall Inshore Fisheries and Conservation Authority

Fal Oyster Survey 2026 Summary Report

Key points

Survey sites

All 81 sites planned were successfully sampled.

Oysters

• Highest abundance recorded to date, with 4,490 oysters, representing a 58% increase from 2025.

• Densities increased across all three management areas, with the highest increases in Areas A and B.

• Clear evidence of recent recruitment, shown by the increased presence of ≤35 mm oysters, particularly across Areas A and B.

• Area C continued to hold the lowest densities, dominated by smaller individuals and with few large oysters.

• Large oysters remained scarce, though numbers increased slightly compared with previous years.

Scallops

• Scallop numbers increased to 2,156 individuals, a 91% rise from 2025, though still well below 2022–2024 levels.

• Densities increased substantially in 2026 compared with 2025, but remain lower than levels recorded in previous years.

• The size structure shifted toward smaller scallops: a large increase in ≤19 mm individuals across the whole fishery in 2026 indicated recent recruitment.

• Large scallops (≥60 mm) continued to decline, with only scattered low-density sites remaining in Areas A and B.

• A new small-scallop hotspot emerged on the upper North Bank, not previously observed.

Non-natives

• Two non-native species identified, all individuals removed from the fishery and retained for disposal.

• Slipper limpets (*C. fornicata*) declined for the fourth consecutive year, falling to 2,333 individuals, the lowest level recorded in the five-year dataset.

• A decline in slipper limpets occurred across all management areas, with the highest density recorded in Area C and most notable decrease in Area A.

• Three *S. clava* (leathery sea squirts) were recorded during the survey.

Bycatch

• A wide range of bycatch species were encountered across all dredges, all returned alive and unharmed (excluding non-native species).

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