Fal Oyster Survey Summary Report 2025

A temporal comparison from 2021 to 2025

Completed by: Cornwall Inshore Fisheries and Conservation Authority (Cornwall IFCA)

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Cornwall IFCA
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Introduction and methodology

Introduction

- Cornwall Inshore Fisheries and Conservation Authority (IFCA) has been responsible for the management of the Fal Oyster 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.

Aims

- To investigate the temporal changes in the relative abundance and distribution of native oysters (*Ostrea edulis)* based on catch rates from 2021 to 2025 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 2021 to 2025 within the Fal Oyster Fishery.
- To investigate the temporal changes of the relative abundance and distribution of slipper limpets (*Crepidula fornicate)* from 2021 to 2025 within the Fal Oyster Fishery.
- To record the distribution of substrate types across the fishery in 2025.
- To record the species of bycatch present across the survey area in 2025.

Method

The survey was carried out onboard Research Vessel (R/V) Tiger Lily VI (Figure 1). For the first 34 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. During the survey an issue was encountered with the anchor resulting in the remainder of the survey being undertaken without an anchor, instead allowing the vessel to drift for 50m the accuracy of which was ensured by using radius rings for each remaining site in HYPACK MAX 2022. This method was considered to produce results consistent with the previous method and therefore would be comparable with previous surveys.

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 vessels A frame and the vessel's 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 knots. The towing warp was run via the A frame mounted hydraulic winch.

A target was created in HYPACK MAX 2022 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 present for the survey period.

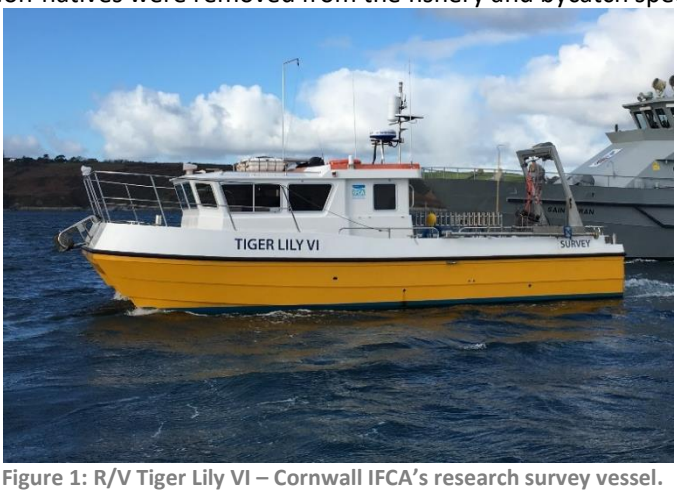

Figure 1: R/V Tiger Lily VI – Cornwall IFCA's research survey vessel.

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

Data normalisation – inferred data

The data from 2021 were normalised to include sites that weren't sampled because of crew capacity due to the Authority's Covid 19 working procedures. For the sites that were not sampled, the average from 2018 to 2020 was used to represent the number of oysters and scallops for the size categories, the average number and the density of oysters. This resulted in an additional 50 sites being included in the number and density analysis for 2021 than were surveyed.

Survey positions

A total of 81 sites were surveyed in 2025, 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.

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The Fal Oyster Fishery Management Areas

Created: A Jenkin 22/02/2023

Area A: North Bank, Mylor Bank and Parsons Bank
Area B East Bank and St Just Flats
Area C: North of a line drawn due east from Pill Point to the coast on Turnaware Point

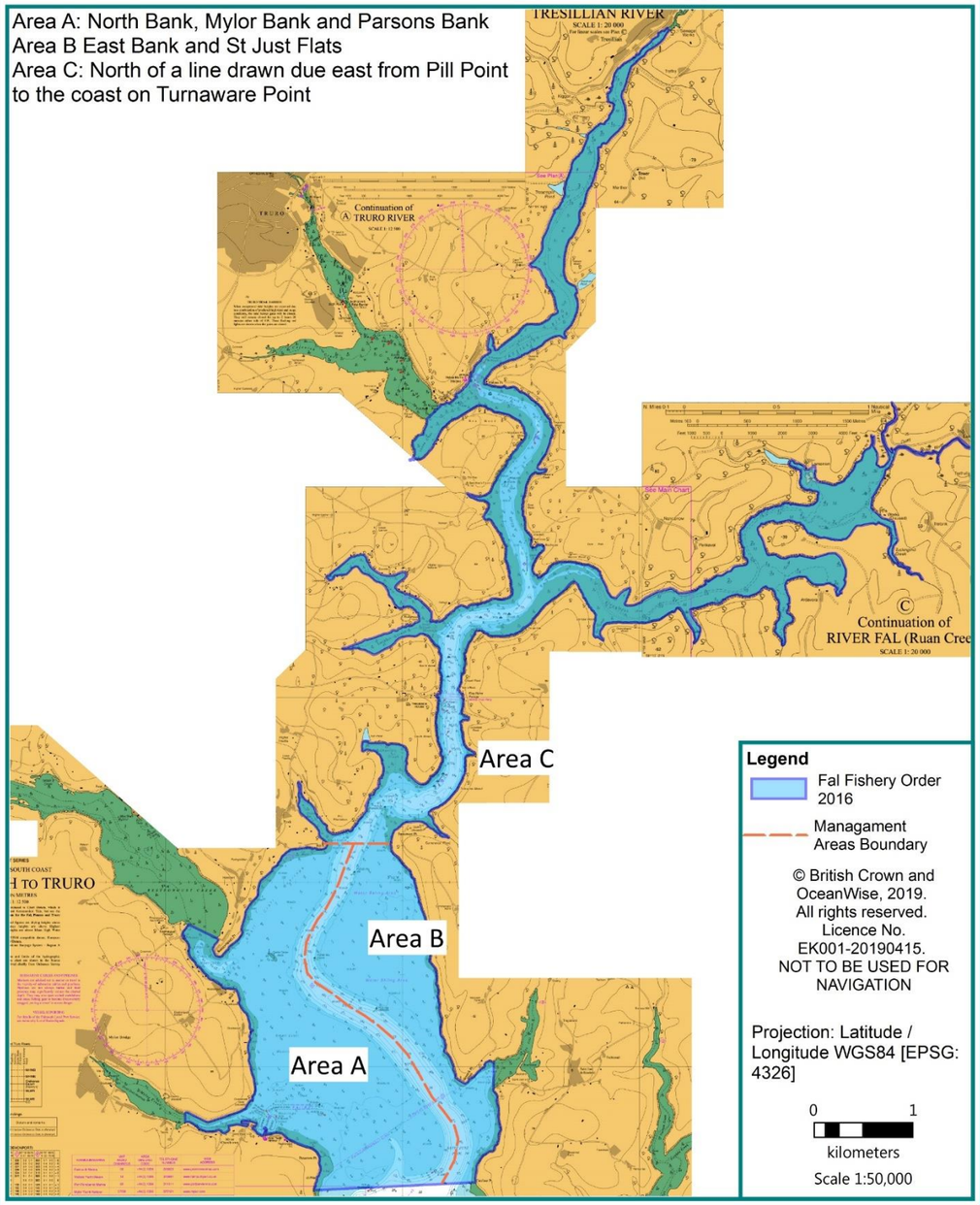

Figure 3: The management areas, A, B and C of the Fal Oyster Fishery.

Site Positions 2025 Fal Oyster Survey

Created by: A Jenkin Date: 28/02/2025

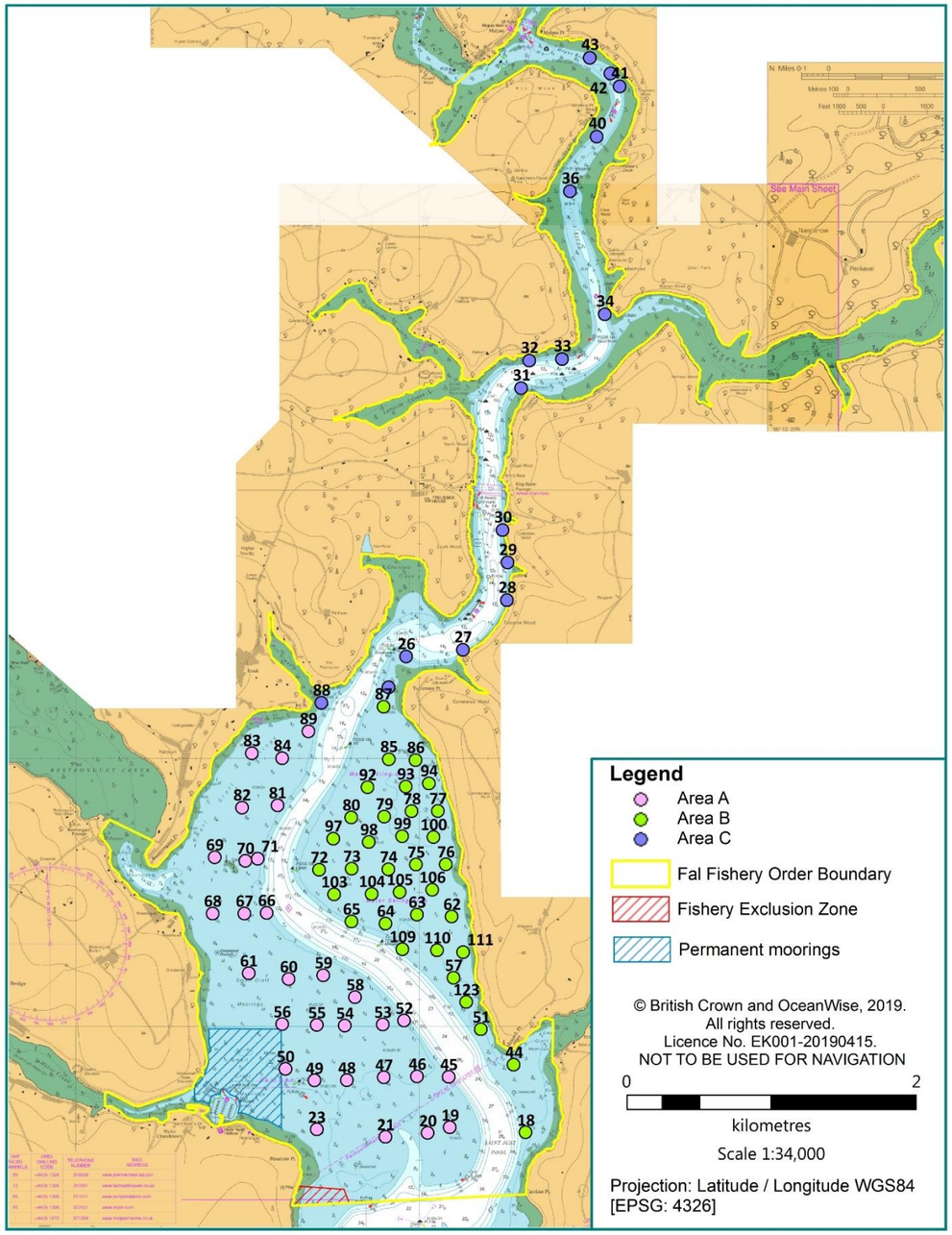

Figure 4: The Fal Oyster Survey area and survey sites in the River Fal, split by management areas A, B and C from the 2025 survey.

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

Oysters

A summary of the number of sites surveyed, number of native oysters and the differences from 2021 to 2025 are shown in Table 1. The number recorded in 2025 was comparable to that of 2024, when the highest number of oysters was recorded. In 2021, sites surveyed were chosen based on the sites which showed high counts of oysters in previous surveys, which is why the number of oysters appears high for the number of sites sampled. This site selection process in 2021 also resulted in a reduction in the volumes of scallops and slipper limpets recorded during the survey. The 2021 data is as recorded and has not been normalised.

Table 1: Summary of survey data and the number of native oysters (*Ostrea edulis*) recorded during the Fal oyster survey between 2021 and 2025.

Year	Number of sites	Number of native oysters	Average number of oysters per site	Difference from previous year	Percentage difference from previous year
2025	81	2,850	35.19	-11	-0.4%
2024	81	2,861	35.32	+854	43%
2023	81	2,007	24.78	+347	21%
2022	81	1,660	20.49	+596	56%
2021	32	1,064	33.25	-201	-16%

In 2025, the density of oysters per 10m^2 was lowest in Area C and highest in Area A, which is similar to 2024. This is contrary to years prior, when Area C had the highest density from 2021 to 2023 (Figure 5). An increasing trend in oyster density has been seen in Areas A and B from 2022 to 2024 which levelled out or declined very slightly in 2025 (Figure 5). The 2021 data is normalised.

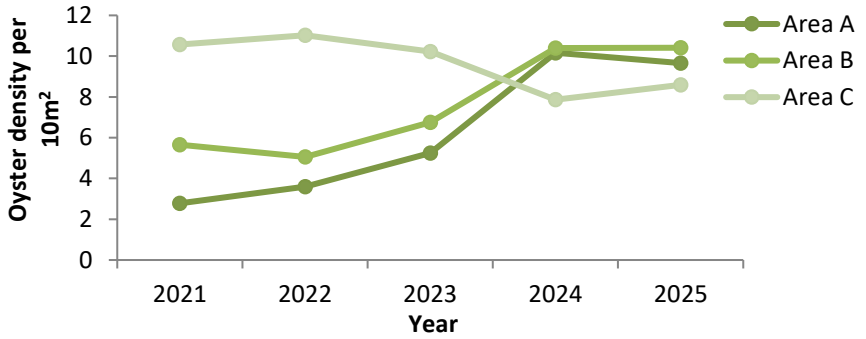

Figure 5: The density of native oysters (*Ostrea edulis*) per 10 m^2 for the three management areas (Area A, B and C) from 2021 to 2025.

The density of oysters has varied across all three management areas from 2021 to 2025 (Figure 6). Trends differed between areas, with some experiencing increases in density while others have shown declines in certain size classes.
In Area A, the oyster density has increased across all size classes over the five-year period. The most notable increase occurred in the ≥36 to ≤50 mm size class from 2023 to 2024. The ≥51 to ≤66 mm size class was the only size class to continue to increase in 2025 to the highest density over the five years for Area A. In Area B, a similar pattern was observed to Area A with fluctuations but an overall increase from 2021 to 2025 except in the ≤35 mm size class. The ≥36 to ≤50 mm size class had the most notable increase, particularly from 2023 onwards. In contrast, Area C showed more variable trends. Notable were the declines in large oysters ≥67 mm from 2023 and oysters ≥51 to ≤66 mm from 2022. Smaller oysters ≤50 mm increased from 2024 to 2025. The 2021 data is normalised.

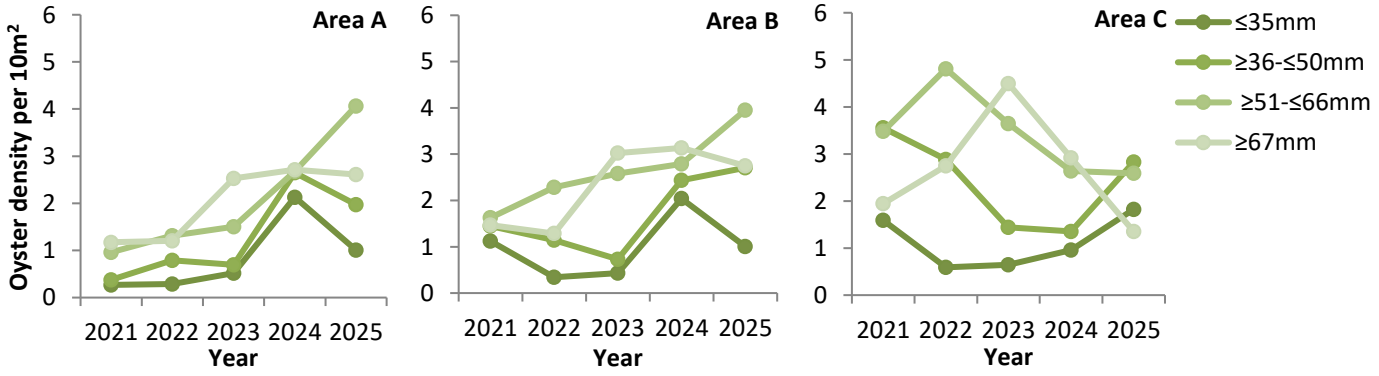

Figure 6: The density of native oysters (*Ostrea edulis*) per 10 m^2 for the three management areas (Area A, B and C) per size class from 2021 to 2025.

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Native oysters (*O. edulis*) – Density

The distribution of the total number of oysters (Figure 7) remained similar to the data in 2024 with a high level of oysters in the central parts of East and North Banks although there was a decrease recorded at Turnaware Point. The distribution of oysters ≥67 mm (Figure 8) was low across most of the fishery until 2023 when an increase was recorded with scattered patches of higher densities at Turnaware Point, a patch north-east of the moorings at Mylor on North bank and a central part of the East bank (Figure 8). In 2025, the density of oysters ≥67 mm remained high but decreased slightly at Turnaware Point and the Eastern side of the East bank. Density plots of Area C, the upper reaches above Turnaware Point, were not mapped by density due to the lack of samples and their scattered distribution which could lead to misleading interpolation. The 2021 data is normalised.

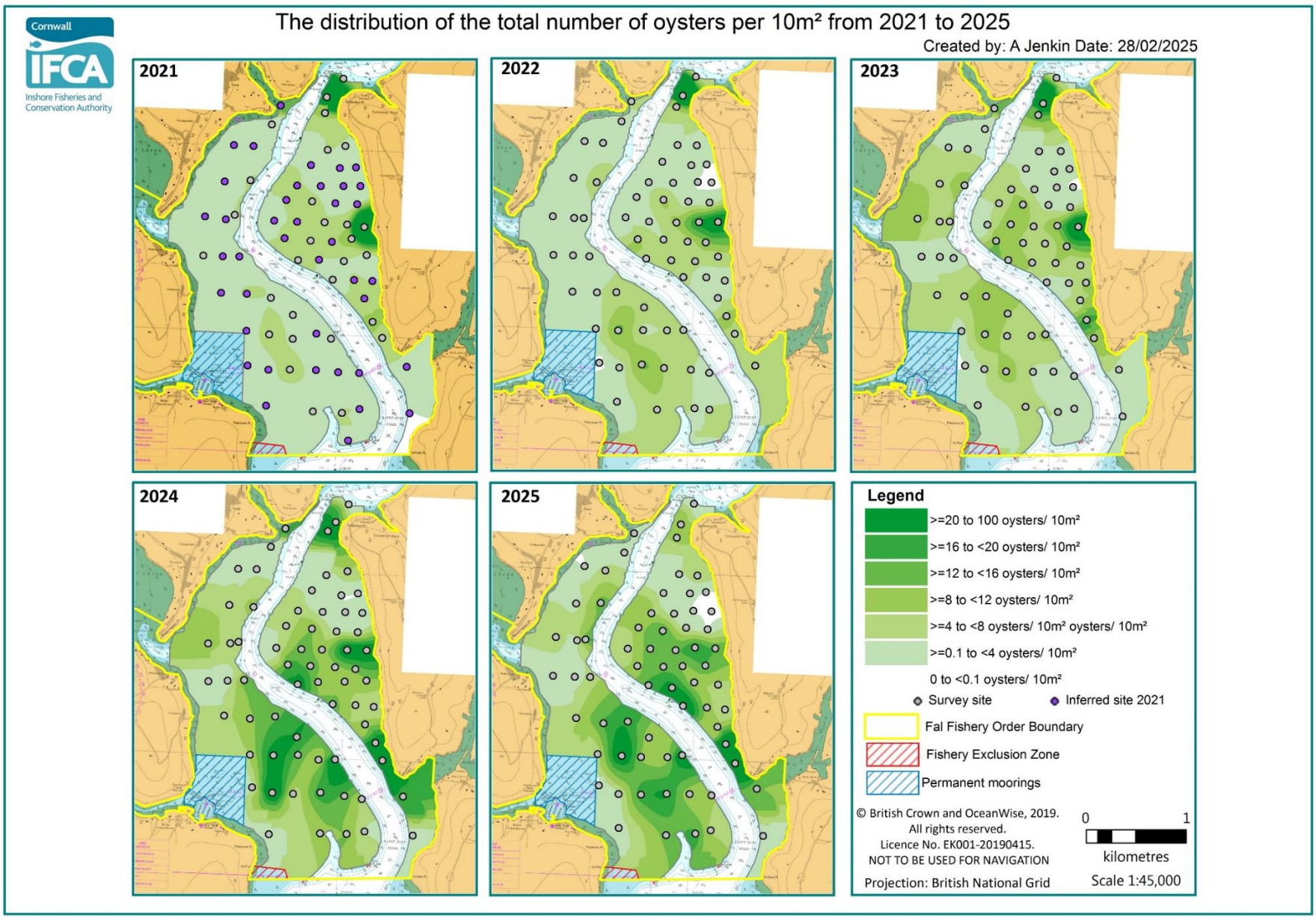

Figure 7: Density map displaying the total number of native oyster (*Ostrea edulis*) per 10 m² within Areas A and B from 2021 to 2025.

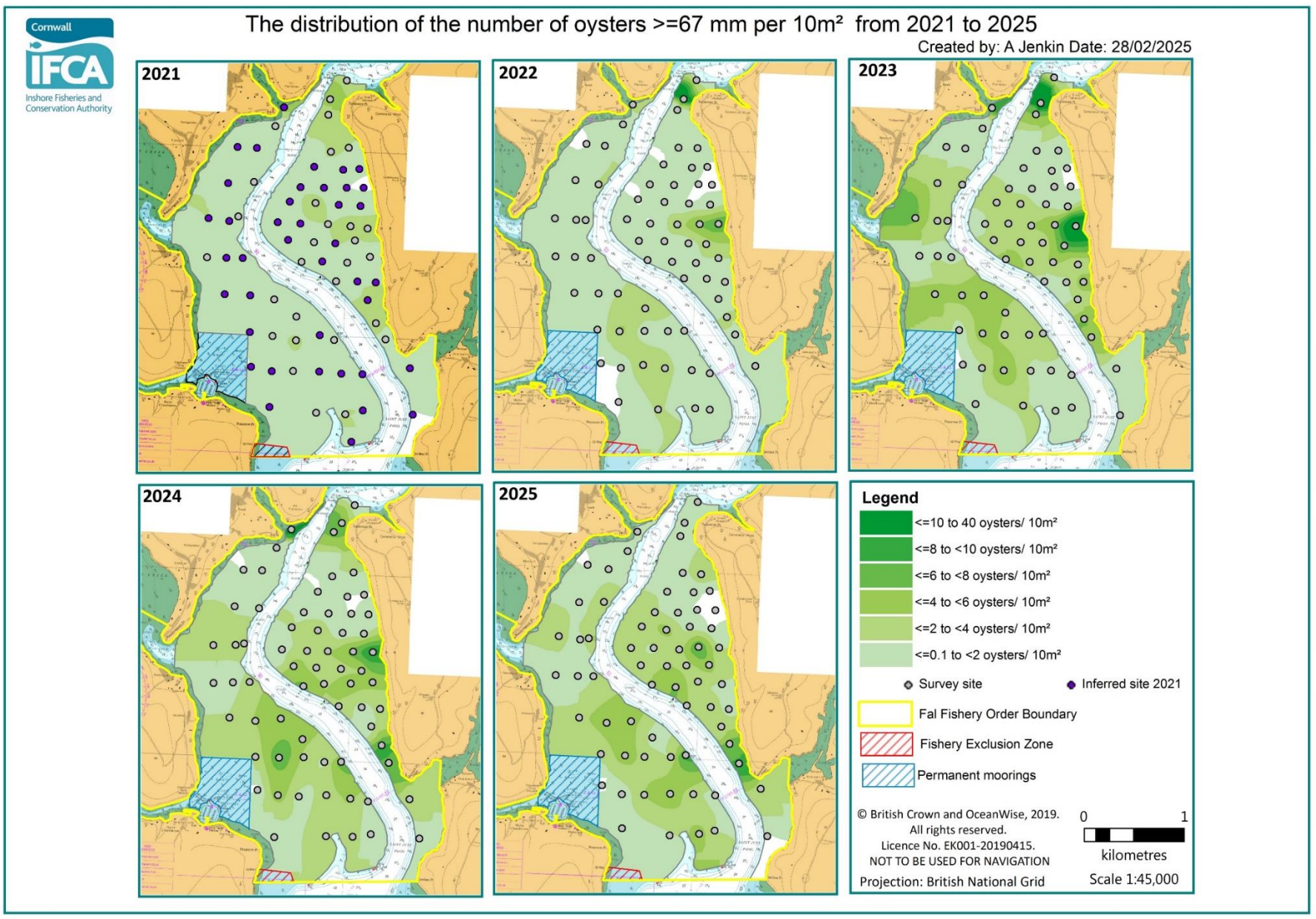

Figure 8: Density map displaying native oyster (*Ostrea edulis*) ≥67 mm per 10 m² within Areas A and B from 2021 to 2025.

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

The length distribution plot for all oysters sampled from 2021 to 2025 is shown in Figure 9. The total mean length (cm) of oysters increased from 2021 to 2023, dropped slightly in 2024 and remained similar in 2025. The overall distribution of sizes is similar across the years, with minor variations. The maximum typical oyster size is relatively stable across years. There are more outliers in some years, particularly 2023 and 2025, suggesting variability in oyster growth. The 2021 data is as recorded and has not been normalised.

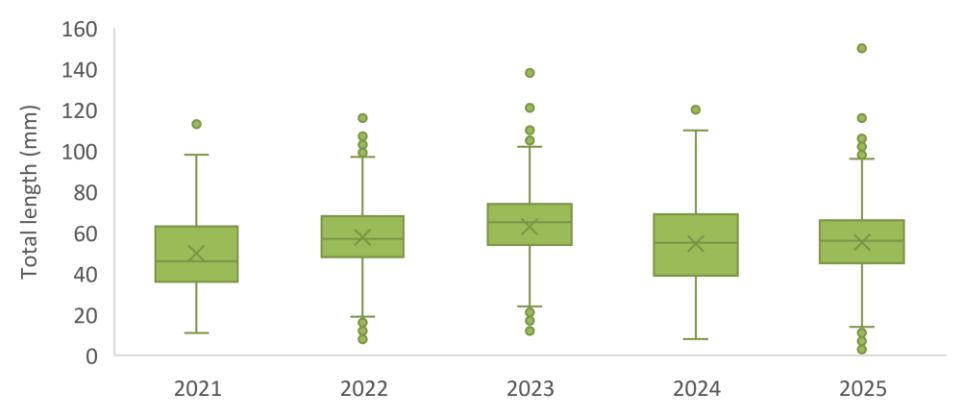

Figure 9: Length distribution plot for all native oysters (*Ostrea edulis*) from 2021 to 2025. Data is grouped by year. X represents the mean, the line represents the median, boxes represent the interquartile range, whiskers represent 1.5* interquartile range, and the filled circles represent outliers.

The percentage of oyster size classes in 2025 was similar to 2022, with a higher percentage of oysters in the ≥51 to ≤66 mm size class and a smaller percentage of oysters in the ≤35 mm size class (Figure 10). This is compared to a more even spread of oysters across the four size classes as recorded in 2021 and 2024. In 2023 a larger proportion of oysters ≥67 mm were recorded. The 2021 data is as recorded and has not been normalised.

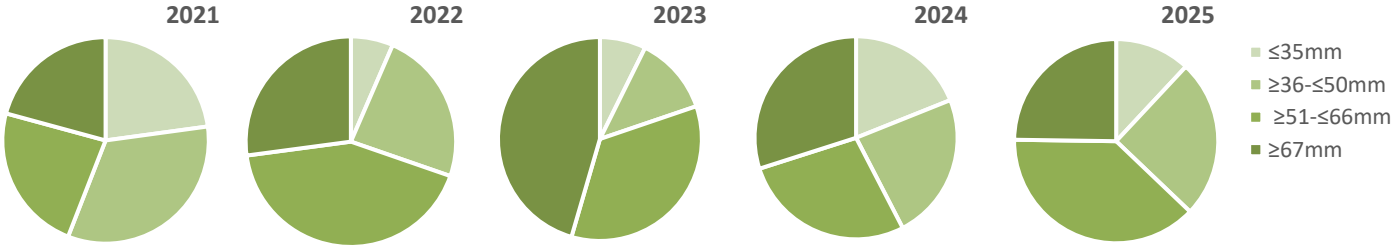

Figure 10: The percentage of native oysters (*Ostrea edulis*) per size class (≥67 mm, ≥51-≤66 mm, ≥36-≤50 mm and ≤35 mm) from 2021 to 2025.

The minimum size for native oysters from the fishery is ≥67 mm. For all three areas the percentage of oysters under the minimum size has been greater than over, although in 2023 the percentages under and over were more even (Figure 11). The lowest percentages of oysters over the minimum size have been recorded in Area C in 2021 and 2025. The 2021 data is as recorded and has not been normalised.

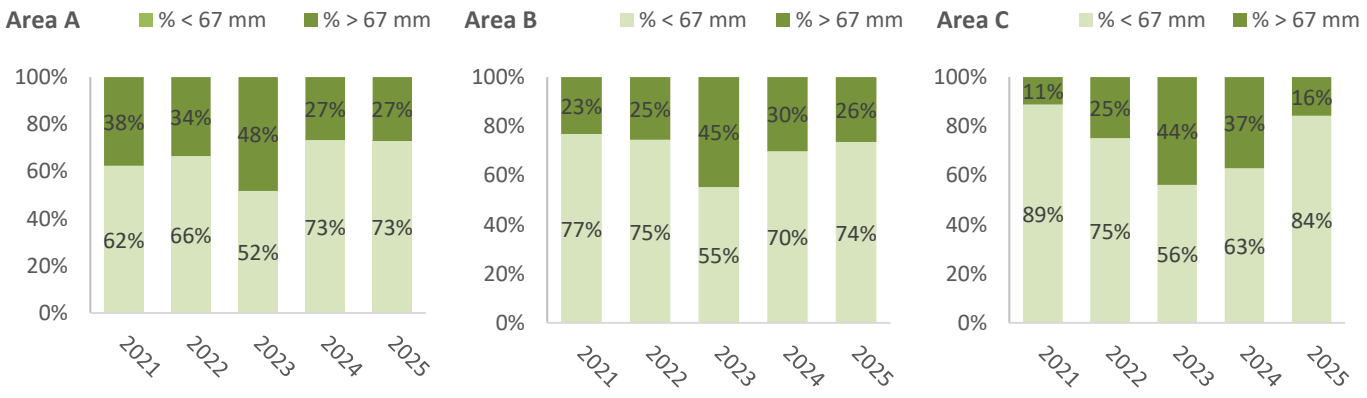

Figure 11: The percentage (%) of native oysters (*Ostrea edulis*) over and under the minimum size (67 mm) for all three management areas (Area A, B and C) of the Fal Oyster Survey area from 2021 to 2025.

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

The composition of size classes of oysters at each site in Area C (Figure 12) and A and B (Figure 13) has varied from 2021 to 2025 with most sites composed of a range of size classes. A greater proportion of smaller oysters was recorded in Area C and a greater proportion of larger oysters was recorded in Areas A and B in 2025. The 2021 data is as recorded and has not been normalised.

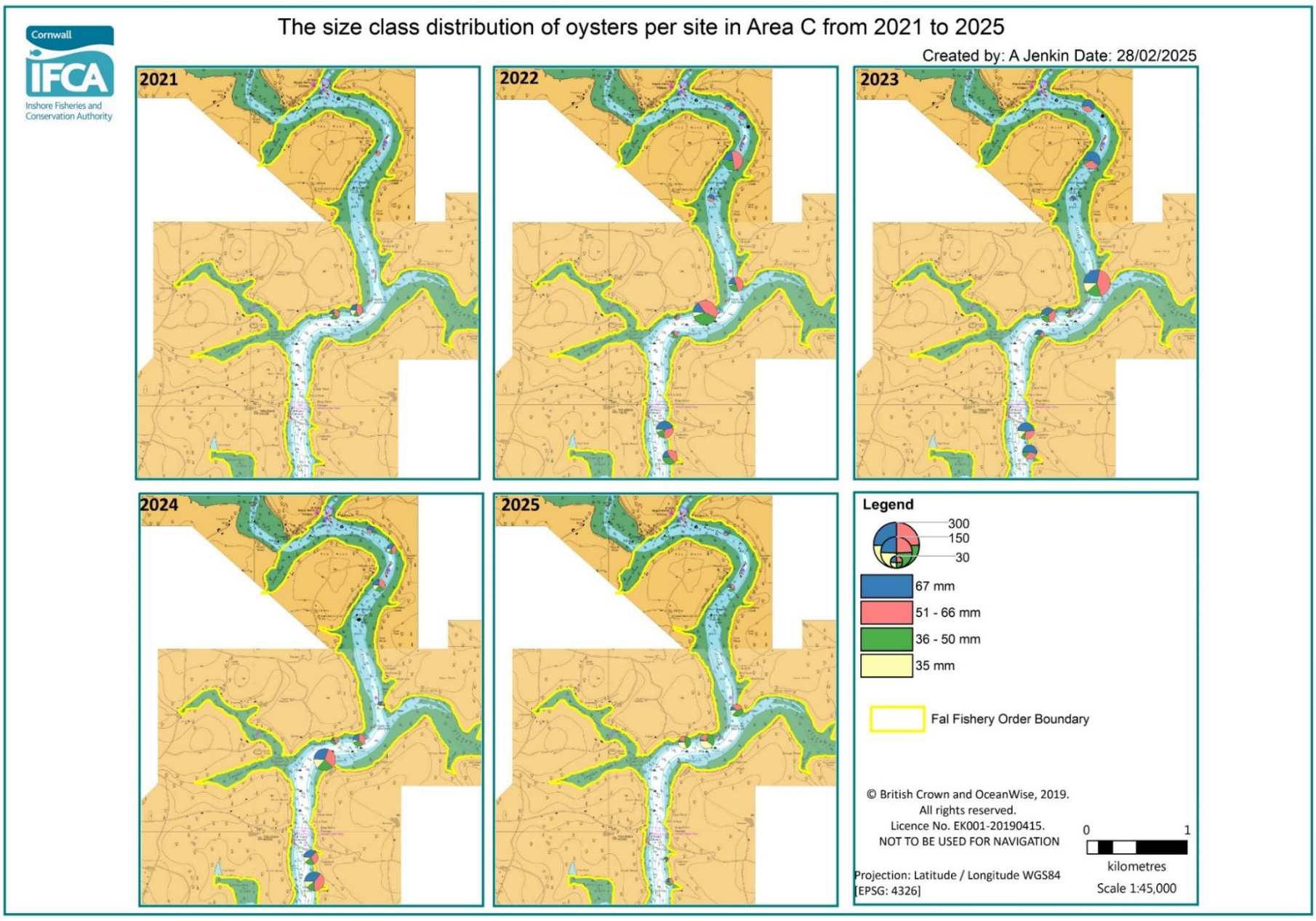

Figure 12: The composition of size classes (≥67 mm, ≥51 to ≤66 mm, ≥36 to ≤50 mm and ≤35 mm) of native oysters (*Ostrea edulis*) per survey station within Area C from 2021 to 2025.

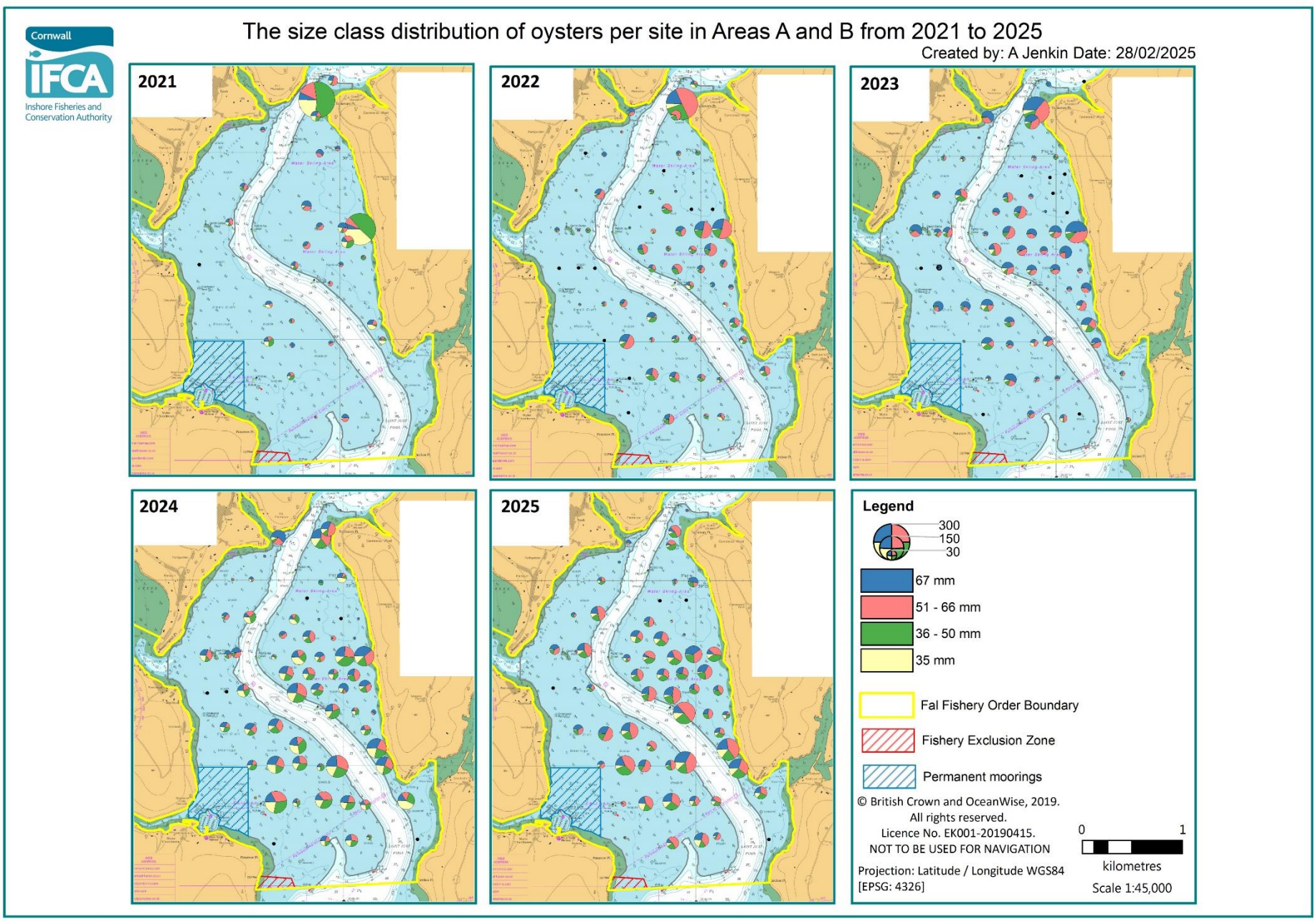

Figure 13: The composition of size classes (≥67 mm, ≥51 to ≤66 mm, ≥36 to ≤50 mm and ≤35 mm) of native oysters (*Ostrea edulis*) per survey station within Areas A and B from 2021 to 2025.

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

The average weight of oysters (g) increased from 2021 to a peak in 2023 then decreased to 2025. The lowest average weight of oysters was recorded in 2021 (Table 2). There was also a peak in the number of oysters ≥67 mm in 2023 and 2021 showed the highest average weight (83.0 g) of oysters ≥67 mm. The 2021 weight data is as recorded and has not been normalised.

Table 2: The number of native oysters (*Ostrea edulis*) weighed and the average weight of native oysters (g) ±standard error and number of oysters ≥67 mm weighed and the average weight of native oysters (g) ≥67 mm ±standard error from 2021 to 2025.

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
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	80.61 ± 2.0
2021	810	37.4 ± 1.2	217	83.02 ± 2.2

A weight distribution plot for all oysters weighed from 2021 to 2025 is shown in Figure 14. There is no obvious trend in total weight mean or distribution from 2021 to 2025.

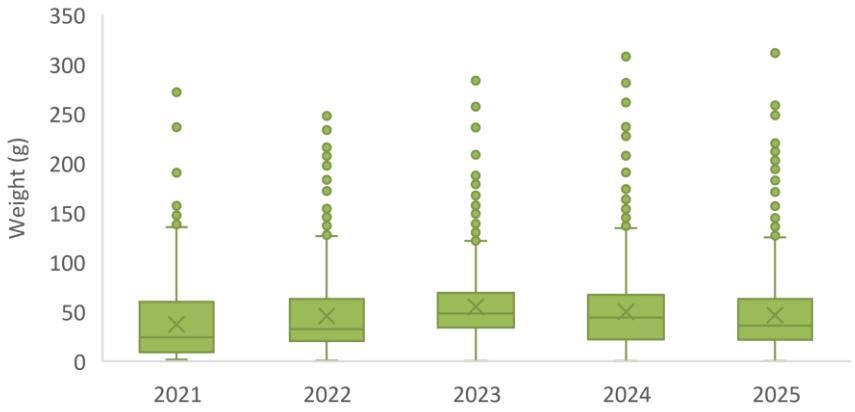

Figure 14: Weight (g) distribution for all native oysters (*Ostrea edulis*) from 2021 to 2025. Data is grouped by year. X represents the mean, the line represents the median, boxes represent the interquartile range, whiskers represent 1.5* interquartile range, and the filled circles represent outliers.

The analysis of average oyster weight (g) from 2021 to 2025 reveals distinct trends across different size classes (Figure 15). For oysters measuring ≤35 mm, there was a fluctuating trend with a drop in weight observed in 2024. The ≥36 to ≤50 mm oysters also showed fluctuations, with decreases in 2021 and 2024. Oysters in the ≥51 to ≤66 mm range exhibited a slight decreasing trend, particularly in 2022 and 2024. The largest oysters (≥67 mm) showed a fluctuating trend, with weight decreasing in 2023, followed by a slight increase from 2024 and 2025.

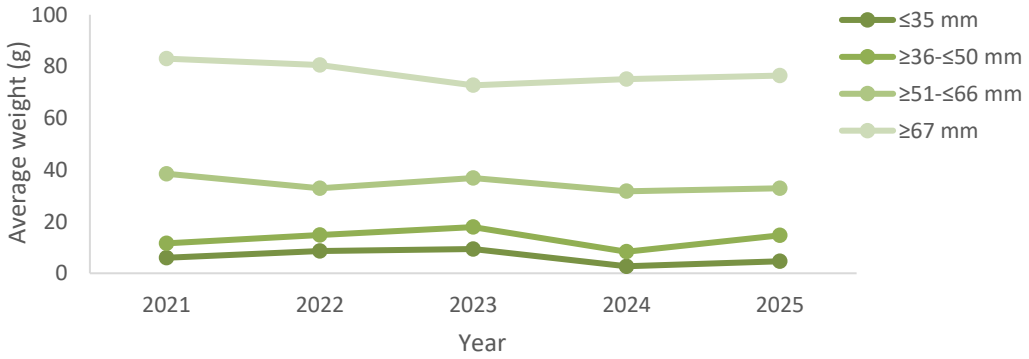

Figure 15: The average weight (g) of oysters per size class from 2021 to 2025

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

The length weight relationship of oysters from 2021 to 2025 is shown in Figure 16 with polynomial regressions for all years. Polynomial curves were chosen to account for the non-linear growth pattern observed in oysters, where weight increases more rapidly than length. The equations for each year show variation in coefficients, indicating changes in the growth trends over time.

The strength of the relationship varies, as shown by the R^2 values, which ranged from 0.6718 (2023) to 0.846 (2021). The highest R^2 value was in 2021, indicating the best fit, while 2023 had the lowest value, suggesting increased variability in the data.

The polynomial curves indicate differences in the rate of weight increase for a given length. The curve is steeper in 2021, 2022, 2024 and 2025, indicating oysters gained weight more rapidly as they grew, while in years where the curve is flatter, 2023, oysters exhibited lower weights for the same lengths. This suggests potential differences in growth conditions across the years.

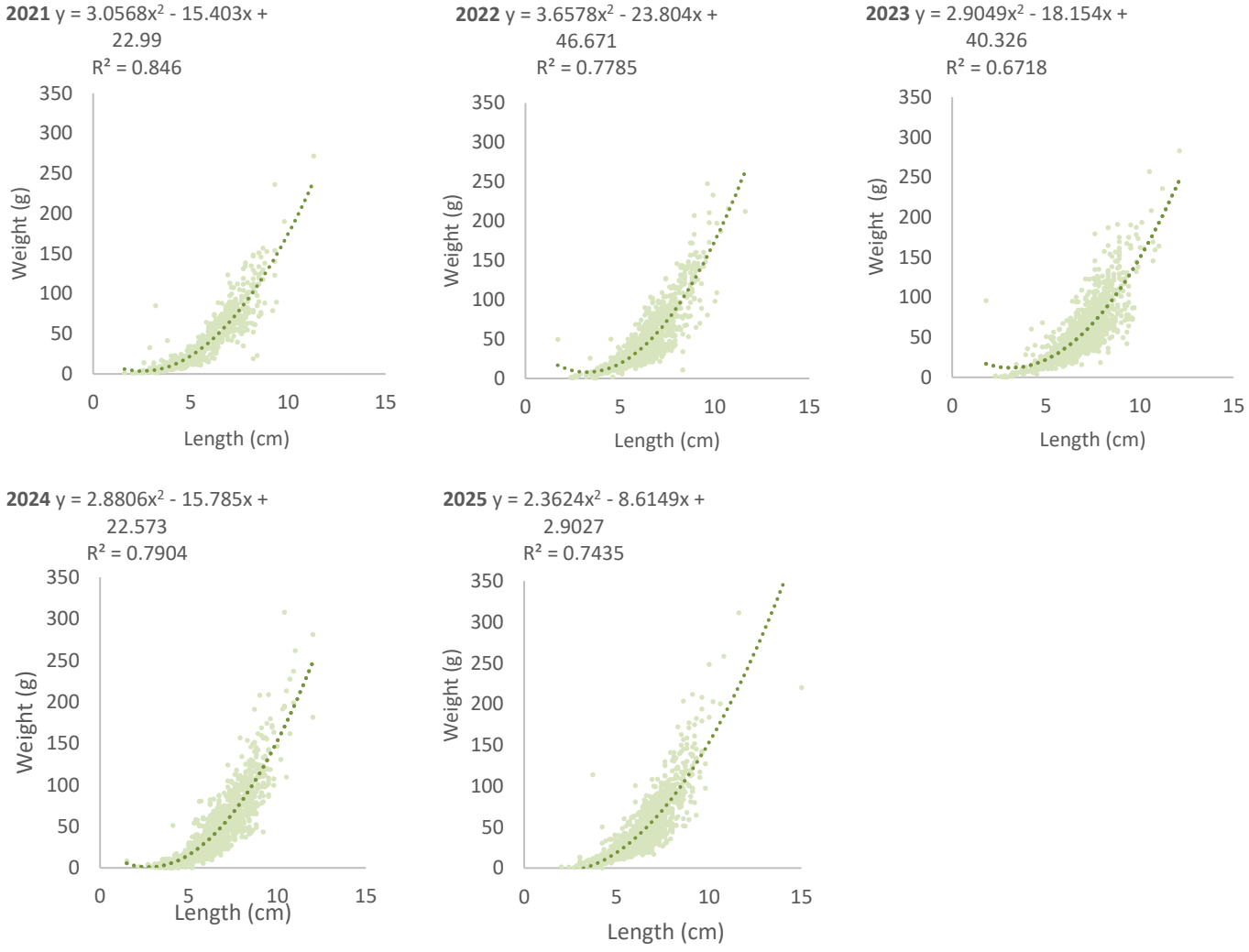

Figure 16: Length (cm) Weight (g) plot for all native oysters (*Ostrea edulis*) both measured and weighed from 2021 to 2025.

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

Queen scallops

In total, 1,129 scallops were measured and recorded in 2025, a decline since 2021 (Table 3). The number of survey sites remained the same from 2022 to 2025, however fewer sites were surveyed in 2021 so the number of scallops is not directly comparable with this year. The average number of scallops per site has decreased since 2021, although 2021 is not directly comparable due to the low number of sites surveyed. The 2021 data is as recorded and has not been normalised.

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 2021 and 2025

Year	Number of sites sampled	Number of scallops	Average number of scallops per site	Difference from previous year	Percentage difference from previous year
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 %
2021	32	2,579	80.6	-2398	-48.18 %

Overall, all three areas have shown a decline in scallop density over time (Figure 17) with the lowest values recorded in 2025. Area A had the highest scallop density in 2021 but showed a steady decline over the years. Area B also showed a similar decline but started with a lower density than Area A. Area C had the lowest density throughout the years, remaining relatively stable, with a slight increase in 2024 before continuing to decline in 2025. The 2021 data is normalised.

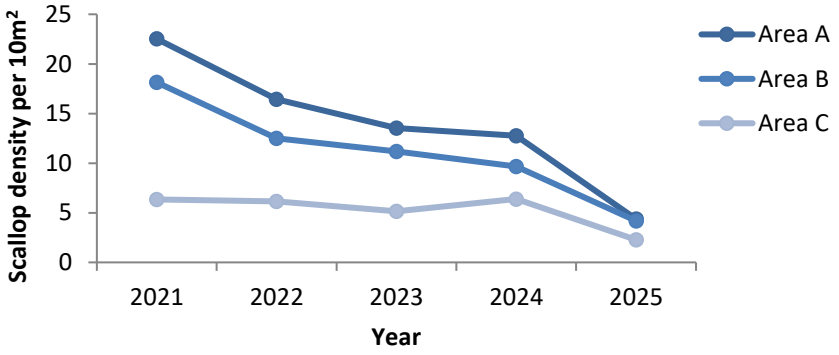

Figure 17: The density of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) per 10 m² for the three management areas (Area A, B and C) from 2021 to 2025.

The density of scallops has varied in all the areas from 2021 to 2025 (Figure 18). In Area A the overall density of scallops has declined with time, with all size classes showing a downward trend. The most notable decline was scallops ≥40 to ≤59 mm from 2021. There was a small spike in small scallops ≤19 mm in 2024, but it dropped again in 2025. Area B followed similar trend to Area A and the density decreased overall with a notable decline in scallops ≥40 to ≤59 mm from 2021. The density in Area C was lower compared to Areas A and B. There was a decline in scallops ≥40 to ≤59 mm from 2021 but this decline was not as steep. There was some fluctuation in small scallops ≤19 mm in 2024, but overall the density remained low. The 2021 data is normalised.

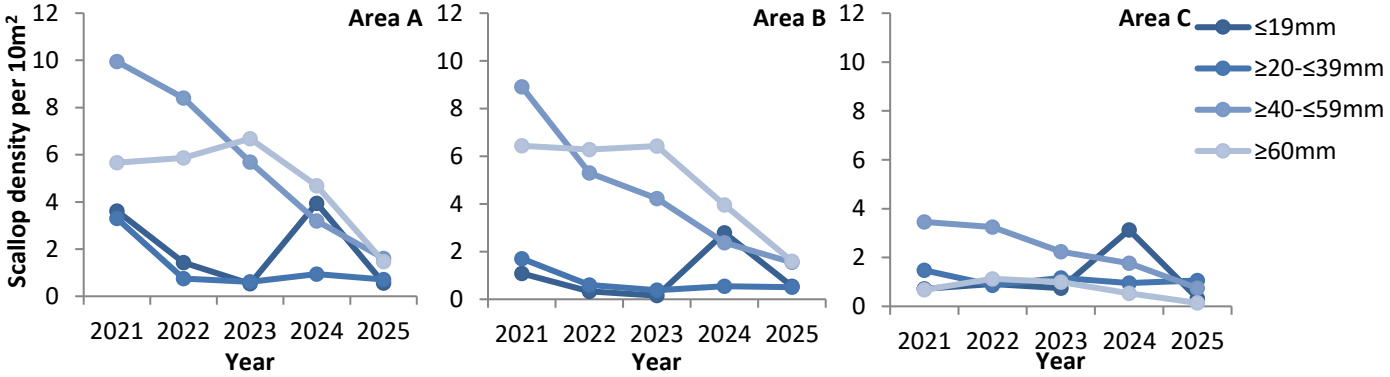

Figure 18: The density of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) per 10 m² for the three management areas (Area A, B and C) per size class from 2021 to 2025.

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Queen scallop (*A. opercularis and M. varia)* – Density

The distribution of the total number of scallops (Figure 19) shows that density has declined across the fishery since 2021 with areas of high density not recorded at all in 2025. The distribution of scallops ≥60 mm (Figure 20) remained relatively similar in 2021 and 2022 with patches of high density recorded either side of the channel on the East bank and North bank throughout the survey years, however, the density decreased from 2023 onwards. The density across the survey area in 2025 was low, with a density of between ≥0.1 to <12 per 10 m^2 recorded across the majority of the survey area. The 2021 data is normalised.

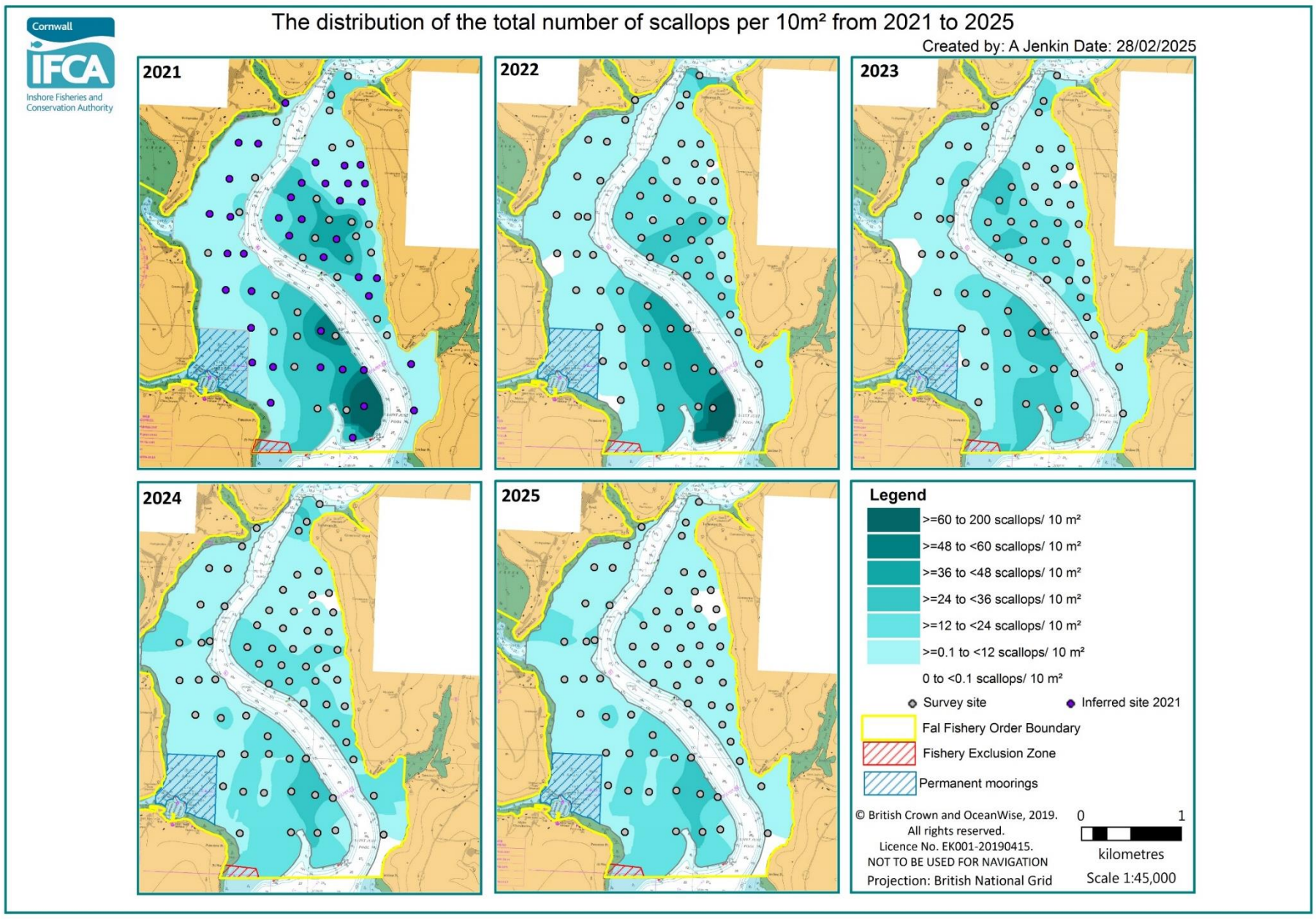

Figure 19: Density map displaying the total number of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) per 10 m^2 recorded within Areas A and B from 2021 to 2025.

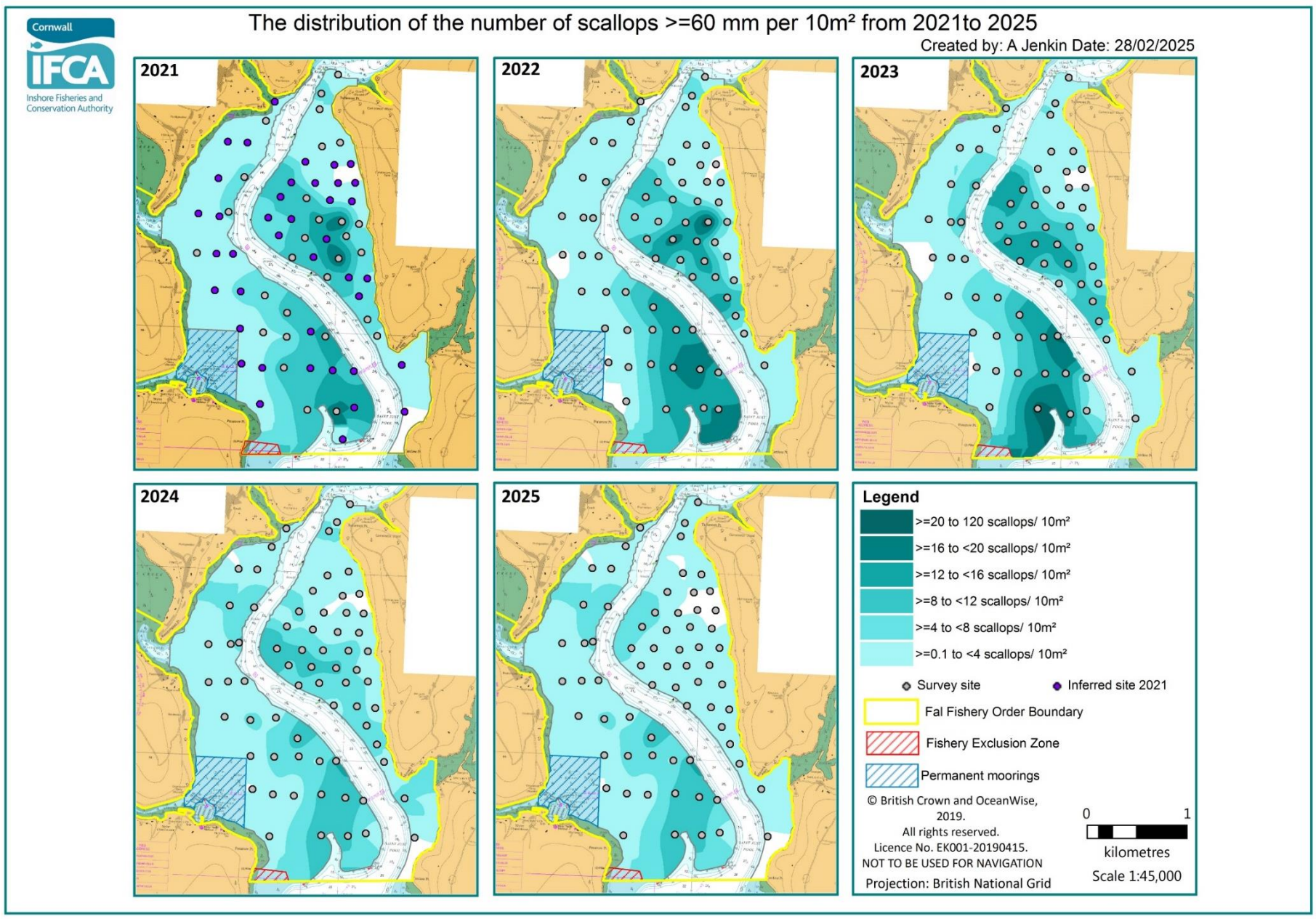

Figure 20: Density map displaying queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) ≥60 mm per 10 m^2 recorded within Areas A and B from 2021 to 2025.

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

The length distribution plot for all scallops sampled from 2021 to 2025 is shown in Figure 21. The total mean length (cm) increased from 2021to 2023, decreased in 2024 and remained comparable in 2025. There was greater variation in scallop sizes from 2024 onward. The 2021 data is as recorded and has not been normalised.

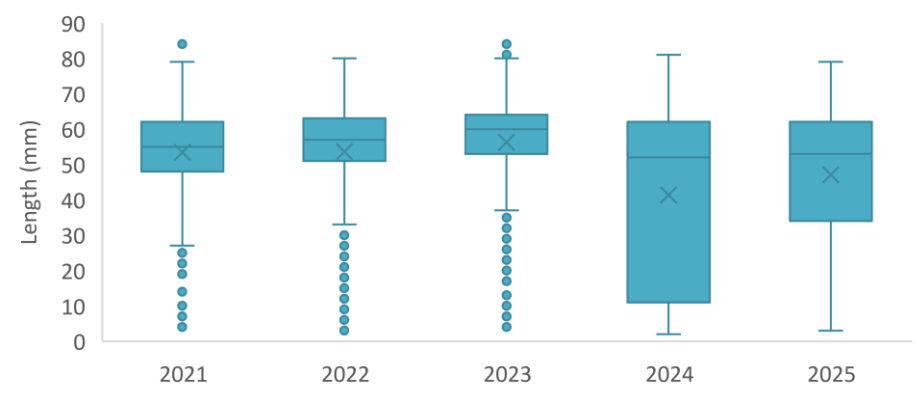

Figure 21: Length distribution plot for all queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) from 2021 to 2025. Data is grouped by year. X represents the mean, the line represents the median, boxes represent the interquartile range, whiskers represent 1.5* interquartile range, and the filled circles represent outliers.

The percentage of scallops per size class in 2025 was a different composition to the previous years (Figure 22). From 2021 to 2023 the majority of scallops were in the larger size class with a relatively small proportion in the smaller size classes. In 2024, there was a noticeable shift with an increase in the percentage of smaller scallops (≤19mm and ≥20 to ≤39 mm while the proportion of larger ≥40 mm scallops decreased. In 2025, the proportion of smaller scallops was less and a greater proportion of scallops ≤40 to 59 mm. The 2021 data is as recorded and has not been normalised.

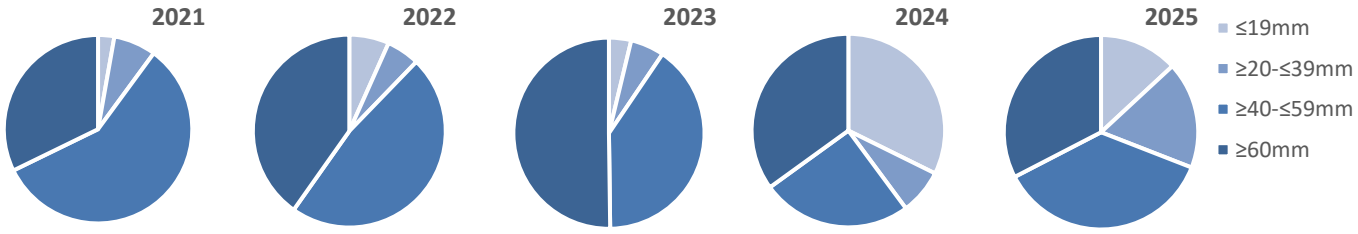

Figure 22: The percentage of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) per size class (≥60 mm, ≥40-≤59 mm, ≥20-≤39 mm and ≤19 mm) from 2021 to 2025.

The Minimum Conservation Reference Size (MCRS) for queen scallops (*Chlamys* spp.) is 40 mm. Despite the MCRS not applying to vessels targeting the fishery because they are not registered and licenced, it was felt that it was appropriate to analyse the data in respect of the MCRS.

The percentage of scallops over and under the MCRS is shown in Figure 23. For all three areas from 2021 to 2025 the percentage over the MCRS was greater than under the MCRS apart from in 2024 and 2025 in Area C, when a larger percentage of smaller scallops was recorded. The 2021 data is as recorded and has not been normalised.

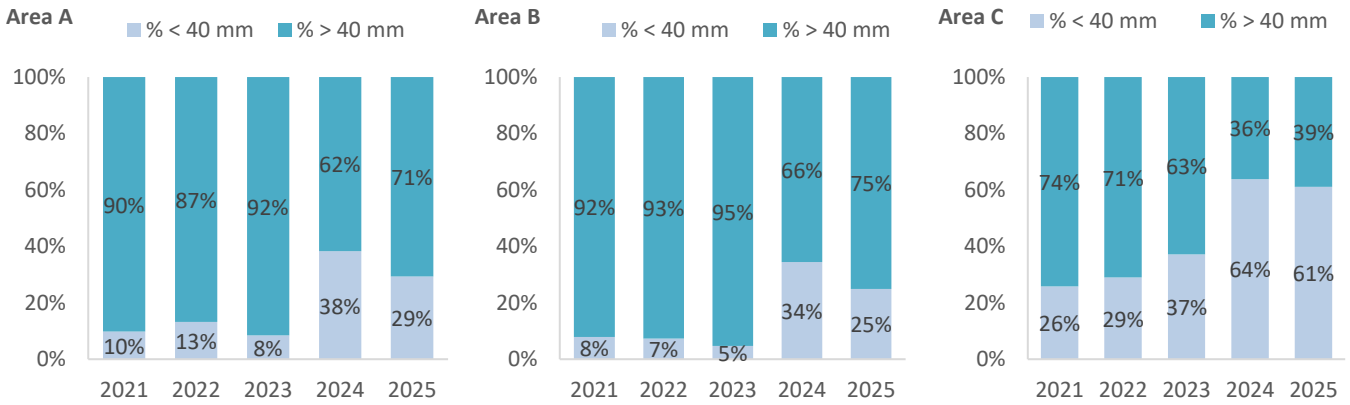

Figure 23: The percentage (%) of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) over and under the minimum conservation reference size (40 mm) for all three management areas (Area A, B and C) of the Fal oyster survey area from 2021 to 2025.

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

The size composition and distribution of size classes (≥60 mm, ≥40-≤59 mm, ≥20-≤39 mm and ≤19 mm) of scallops for each site is shown in Figure 24 (Area C) and Figure 25. (Areas A and B). A low level of scallops has been recorded in Area C since 2021. In Areas A and B, the number of scallops has decreased considerably since 2021 with very few smaller scallops recorded in 2025. The 2021 data is as recorded and has not been normalised.

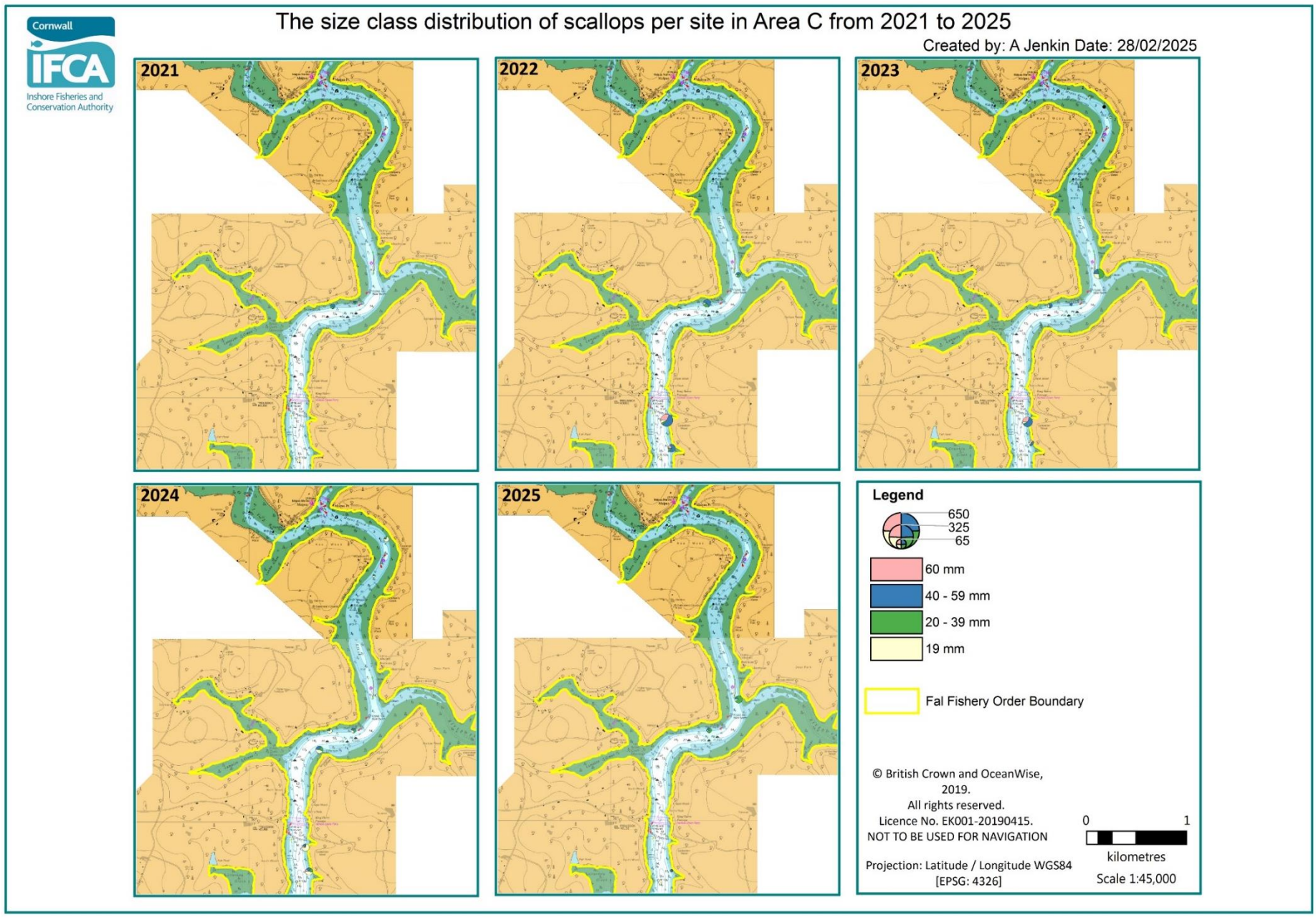

Figure 24: The size composition and distribution of size classes (≥60 mm, ≥40-≤59 mm, ≥20-≤39 mm and ≤19 mm) of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) for each site within Area C from the 2021 to 2025.

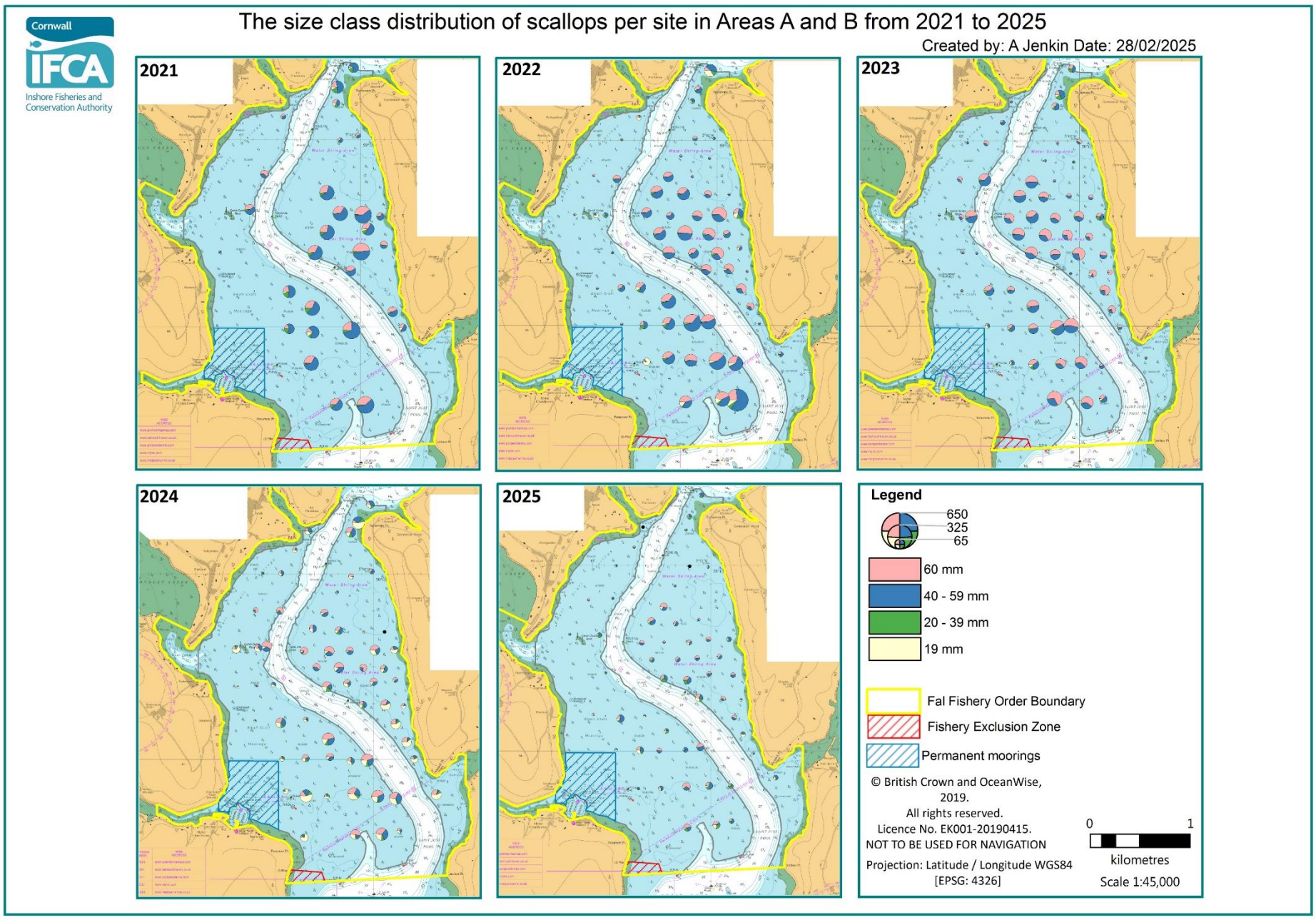

Figure 25: The size composition and distribution of size classes (≥60 mm, ≥40-≤59 mm, ≥20-≤39 mm and ≤19 mm) of queen scallop (*Aequipecten opercularis*) and variegated scallop (*Mimachlamys varia*) for each site within Areas A and B from 2021 to 2025.

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Bycatch, non-natives and dredge composition

Non-native species

Three non-native species were recorded during the 2025 survey, slipper limpets (Table 6), a Pacific oyster (*Magallana gigas*) and three leathery sea squirts. The number of slipper limpets has decreased since 2022 and a low density of slipper limpets was recorded across the survey area in 2025 (Figure 26). The reduced number of sites chosen in 2021 were chosen for the high presence of oysters and scallops which is why the number of slipper limpets was so low in 2021. 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. The 2021 data is as recorded and has not been normalised.

Table 6: Summary of survey data and the number of slipper limpets (*Crepidula fornicata*) recorded during the Fal oyster survey between 2021 and 2025

Year	Number of sites	Number of slipper limpets	Area A	Area B	Area C
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
2021	32	1,879	980	661	238

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 is shown for Areas A, B and C in 2025 in Figure 27.

Maerl

Live maerl – recorded at two sites; one fragment at each site.

Dead maerl – 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 good condition and returned alive to the water straight away (unless a non-native species).

Similar to previous years, the species of red algae, *Solieria chordalis* was recorded in abundance at many sites (Figure 27), with a high abundance of red weed in a basin in the central part of East Bank but it was also recorded in small quantities in sites to the south of the survey area near St. Just in Roseland.

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Fal Oyster Survey 2025 Summary Report

Bycatch, non-natives and dredge composition

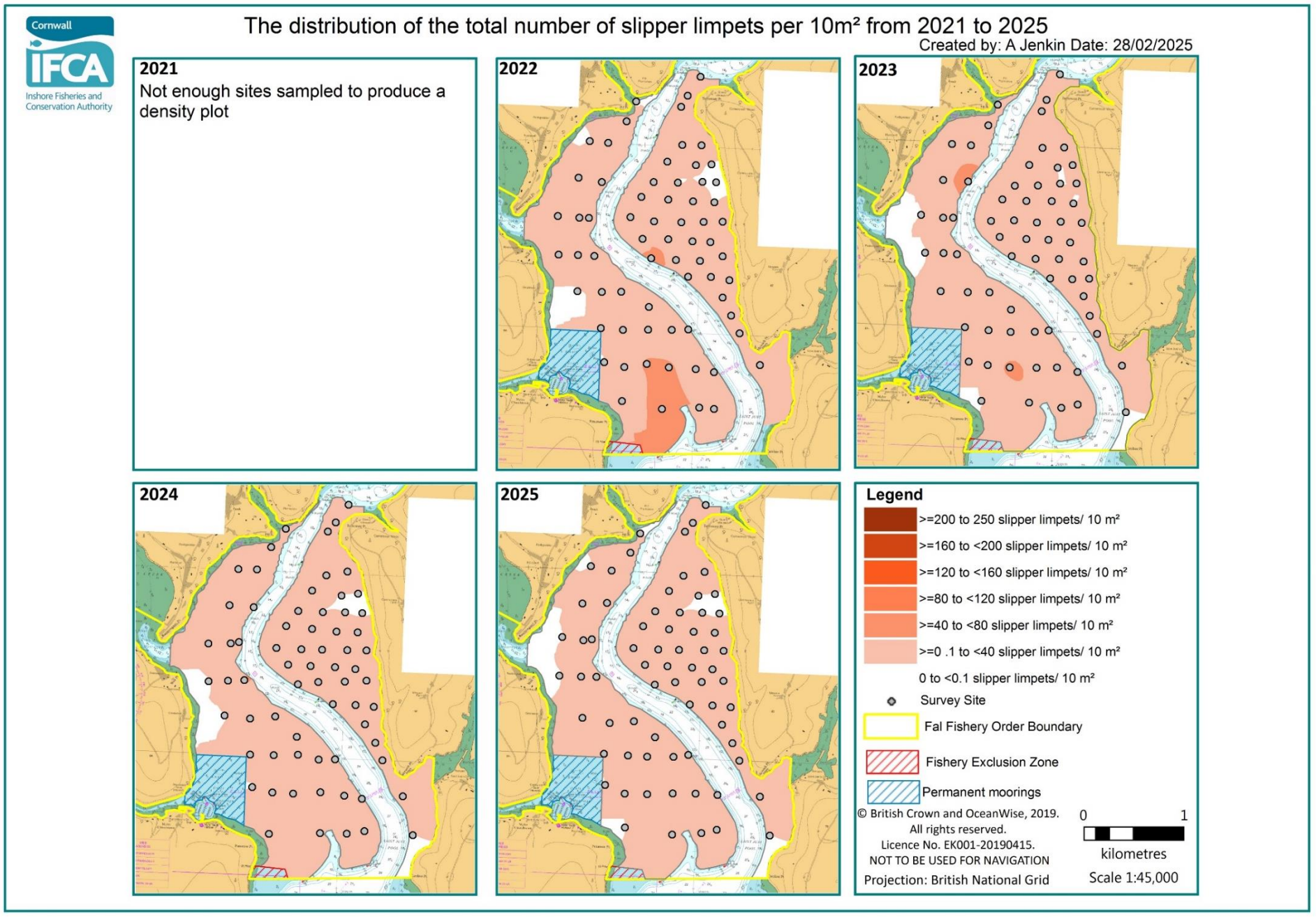

Figure 26: Density map displaying the total number of slipper limpets (*Crepidula fornicata*) 10 m² recorded within Areas A and B from 2021 to 2025.

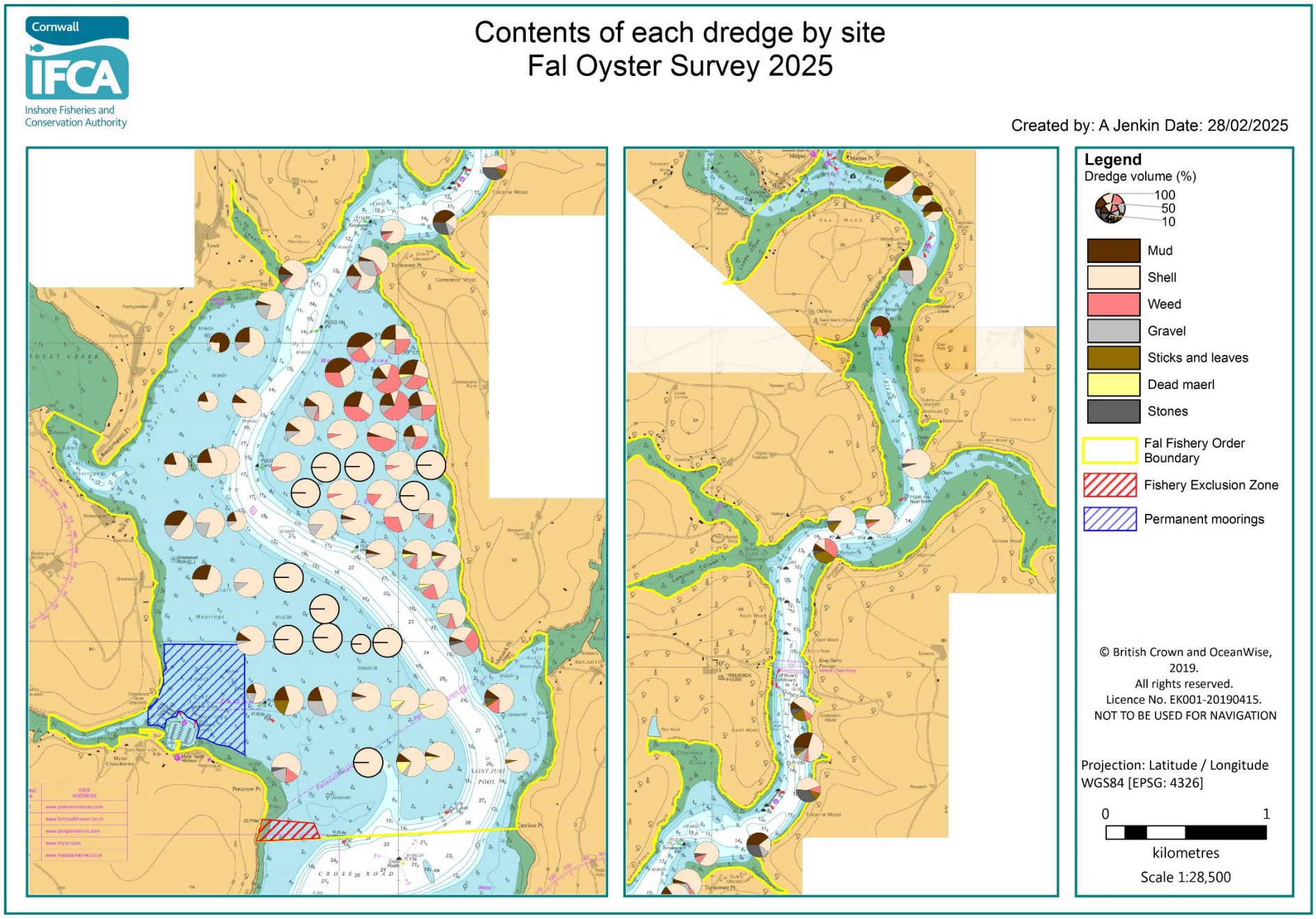

Figure 27: The dredge volume and the contents of each dredge per site recorded during the Fal Oyster Survey 2025.

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Fal Oyster Survey 2025 Summary Report

Key points

Survey sites

A total of 81 sites successfully sampled.

Oysters

High number of oysters with only 11 fewer than recorded in 2024.

In 2025, the highest proportion of oysters were in the ≥51 to ≤66 mm size class.

In 2025, the lowest proportion of oysters were in the ≤35 mm size class.

Average weight of oysters has decreased since 2023, although not every individual was weighed.

Low number of oysters recorded in Area C.

High density of oysters recorded across Areas A and B.

Scallops

Decrease in the number of scallops in 2025.

Higher proportion of large scallops (≥40mm) in 2025.

Low proportion of small scallops (≤19 mm) in 2025.

The density of scallops per 10 m^2 has decreased since 2021 in Areas A, B and C.

Non-natives

Decline in the number of slipper limpets since 2022.

Three non-native species identified, all specimens removed from the fishery.

Bycatch

Live maerl recorded at two sites (one fragment per site).

Dead maerl recorded at ten sites.

Large number of bycatch species returned unharmed.

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