



## Impacts of COVID-19 on U.S. mollusk businesses: Quarter 1 Results

March 23, 2020 to April 10, 2020

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### Introduction

On March 23rd, 2020 Virginia Tech Seafood AREC and The Ohio State University Extension initiated an online survey of the U.S. aquaculture, aquaponics, and allied businesses. This survey was designed to capture and quantify the effects of the coronavirus disease (COVID-19) on the aquaculture, aquaponics, and allied industries. The survey closed April 10th, 2020 at 11:59 pm. The survey will be distributed at the conclusion of every quarter for 2020, to attempt to capture the evolving impacts of COVID-19 over time.

Survey methods are detailed in the Virginia Cooperative Extension Fact Sheet VCE-AAEC-218, available at:

[https://www.arec.vaes.vt.edu/arec/virginia-seafood/research/Impacts\\_of\\_COVID19.html](https://www.arec.vaes.vt.edu/arec/virginia-seafood/research/Impacts_of_COVID19.html). This report is a supplemental report to the overall survey that summarizes results of **mollusk farm** respondents.

### Methods

For a detailed description of the methods for this study, please consult the factsheet summarizing the Q1 results (AAEC-218NP). Data for this study were collected through an online survey distributed through Qualtrics. It should be noted that respondents self-selected for participation in the study and there was no specific sampling protocol followed due to time constraints and challenges with obtaining contact lists. It is therefore possible that

responses are skewed towards those farms and businesses that have been more affected by the coronavirus (COVID-19) disease pandemic. This study is being conducted for the duration of 2020, with a survey being administered quarterly to capture the evolving effects and impacts of the coronavirus diseases (COVID-19) pandemic on U.S. aquaculture, aquaponics, and allied businesses. The responses summarized in this fact sheet were collected during the Q1 survey, between March 23rd and April 10th, 2020.

### Results

#### Characterization of Respondents

Quarter 1 survey results showed that there were **184 mollusk farm participants**, that represent approximately 21% of the U.S. mollusk farmers reported in the 2018 Census of Aquaculture (USDA, 2019). Fifty percent of mollusk respondents sold their products to a distributor, with 9% selling direct to consumers, 16% selling to restaurants, 12% to a processor, and 5% to other aquaculture farms (Table 1).

Table 1. Primary marketing channel for mollusk respondents.

Category	Percentage
Distributor	50%
Restaurants	16%
Processor	12%
Direct to consumers	9%
Other aquaculture farms	5%

### Scale of farms/businesses

Responding mollusk farms varied in terms of their production scale. Respondents reported annual sales from \$1 to \$1,000 to in excess of \$1 million (Table 2). The greatest percentage (19%) of respondents reported sales in the range of \$100,000 to \$250,000, this was followed by farms with sales greater than \$1 million (18%), \$50,001 to \$100,000 (17%), and \$250,001 to \$500,000 (11%). Annual sales scales for \$500,001 to \$1 million, \$25,001 to \$50,000, and \$10,001 to \$25,000 were all tied at 8% of respondents. Five percent of respondents had annual sales less than \$10,000.

Table 2. Scale of mollusk respondent farms/businesses.

Category	Percentage
\$100,001 - \$250,000	19%
> \$1 million	18%
\$50,001 - \$100,000	17%
\$250,001 - \$500,000	11%
\$500,001 - \$1 million	8%
\$25,001 - \$50,000	8%
\$10,001 - \$25,000	8%
No response	7%
\$5,001 - \$10,000	3%
\$1,001 - \$5,000	1%
\$1 - \$1,000	1%

### Aquaculture Regions

In terms of USDA defined aquaculture regions, 52% of respondents were located in the Northeastern Aquaculture Region. This was followed by the Southern Aquaculture Region (41%) and the Western Aquaculture Region (7%).

Table 3. Participation by aquaculture region.

Region	Percentage of survey respondents
Northeastern	52%
Southern	41%
Western	7%

## Key Findings

Ninety-seven (97%) percent of mollusk respondents reported that their farm or business had been impacted by the COVID-19 pandemic. Less than two percent said that their mollusk business had not been impacted, and < 2% were uncertain or unsure whether their farm or business had been impacted. Those who reported that their mollusk farm or business had not been impacted, were asked if their farm or business expected to be impacted in 2020; 50% said “probably yes”, 33% said it would “definitely” be impacted, and 17% said “probably not”. No respondents said that their business would “definitely not” be impacted.

Asked whether their farm or business would survive the next 3 months without external intervention (such as government assistance), only 24% said, “yes”. Fifty-nine percent reported that their farm or business would “maybe” survive 3 months without external assistance, and **17% said that their farm or business would not survive 3 months without external assistance** (1% of respondents did not respond to this question). When asked the same question, but for the next 6 months, only 10% said that their farm or business would survive, 48% said “maybe,” and **41% said that their farm/business would not survive the next 6 months without external assistance** (1% did not respond). Responses related to 12 months without external assistance were that **62% indicated that they would not survive**, 31% said that their farm or business would “maybe” survive, and only 7% said that they would survive (1% did not respond to this question).

## Lost Sales

**Ninety-eight percent of mollusk farm respondents indicated that they had lost sales due to the COVID-19 pandemic.** Fourteen

percent of mollusk respondents indicated that they had lost sales to international or export markets outside the U.S. In terms of the volume of sales that had been lost, 18% reported losses in the range of \$10,001 to \$25,000; another 16% said that they reported losses in the range of \$25,001 to \$50,000, followed by 13% that could not estimate the losses at the time they responded to the survey. Twelve percent reported losses of \$50,001 to \$100,000; 11% lost from \$1,001 to \$5,000; 10% lost \$5,001 to \$10,000; 8% \$100,001 to \$250,000; 4% of respondents reported losing \$250,001 to \$500,000, and 3% lost \$500,001 to \$1 million or in excess of \$1 million. Respondents noted that March is normally a strong month for sales; with one respondent reporting 3 months of consecutive losses and another reporting \$5 million in losses for the first quarter.

Reported lost sales included canceled private and government contracts; **90% percent of mollusk farm respondents reported losing private contracts** for sales and 6% reported losing government (state or federal) contracts for sales.

Respondents were further asked what challenges they expected to experience on their farms or businesses as a result of the coronavirus pandemic in 2020. **Ninety-nine percent of mollusk farm respondents indicated that they expected to lose sales in 2020**, with 15% expecting to lose sales to international markets. In terms of the volume of sales expected to be lost, 15% of respondents reported that they were not able to estimate the volume at this time. Seventeen percent estimated that lost sales would be in the range of \$100,001 to \$250,000; 16% \$50,001 to \$100,000; 13% \$25,001 to \$50,000 or \$10,001 to \$25,000; 8% \$250,001 to \$500,000; 6% \$5,001 to \$10,000; 4% greater than \$1 million; 3% \$500,001 to \$1 million or \$1,001 to \$5,000; and 1% \$1 to \$1,000. Six respondents reported that their farm or business expects to experience in excess of \$2 million in lost sales; with one respondent estimating a loss of \$15 million.

When asked how long mollusk respondents thought their farm or business could survive without sales before suffering longer term cash flow effects, 51% said 1 – 3 months, 17% said 4 – 6 months, 14% said less than 1 month, 12% did not respond to this

question, 3% said between 7 and 10 months, while another 3% reported more than 10 months. **It should be noted that some respondents completed the survey 4 weeks prior to the preparation of this report.**

## Labor

**Forty-two percent of respondents reported that they had laid off employees as a result of the COVID-19 pandemic.** While 24% of respondents indicated that they “will have to soon”. Thirty-four percent had not laid off employees. The numbers of employees laid off varied amongst respondents, but the majority (56%) of mollusk farm or business respondents indicated that they had laid off 1 to 3 employees. Another 20% had laid off from 4 to 6 employees, 11% between 11 and 15 employees, 7% greater than 20 employees, and 4% between 7 and 10 employees. **An individual respondent reported having laid off as many as 329 employees.** One respondent reported having to move in excess of 290 employees to standby, in addition to implementing pay cuts for employees earning above a set salary level and owners working without pay.

Respondents were also asked how many weeks before they would have to decide whether to lay off employees. **Sixty-four percent of mollusk respondents indicated that they would have to decide within 1 – 3 weeks whether to lay off employees.** Fourteen percent said that they had less than a week to decide whether to lay off employees, and another 14% said that they had between 4 to 6 weeks to make that decision. Only 2% of respondents indicated they had more than 10 weeks to make a decision about laying off employees. **Again, it should be noted that the data collection period was open for 3 weeks, which means that some respondents completed the survey 4 weeks before the preparation of this report.** Mollusk respondents were further asked how many employees they would need to lay off at that time. Eighty-one percent said that they would have to lay off from 1 – 3, 10% said that they would have to lay off between 4 and 6 employees, 5% between 7 and 10 employees, and 2% more than 20 employees. Respondents who indicated more than 20 employees, did not specify an exact number. Of those employees who had been laid off, 40%

of mollusk respondents indicated that these were “Short-Time” or “Shared-Work” employees.

Thirty-eight percent of mollusk farm respondents had experienced some type of labor challenge. Some respondents reported employees to have missed work due to the COVID-19 pandemic. Those who missed work included those who were instructed to self-quarantine at home due to symptoms exhibited. Twenty-three percent of mollusk farm or business respondents indicated that employees had missed work, while 77% reported that employees had not missed work due to the coronavirus. **Of those respondents who reported employees missing work, 32% reported 11 to 14 lost days, 27% reported in excess of 14 lost days, 22% reported 7 to 10 lost days, and 10% reported between 4 to 6 or 1 to 3 lost days of work.**

Some respondents commented on labor challenges related to being unable to manage or harvest crops due to illness or shelter in place orders. One respondent expressed challenges with trucking or delivery of product due to labor shortages, another respondent commented on the inability to sell product direct to consumers because employees are unable to complete required Food and Drug Seafood Hazard Analysis of Critical Control Point training.

## **Challenges to the farm/business**

Mollusk farm respondents reported a variety of different challenges to their farms and business that included production challenges not related to labor; including effects of holding market-ready product for extended periods of time, interruptions to inputs such as gear or seed, delays in permitting, inspections, or training to be able to access new markets, lower farm-gate prices, and challenges with financial services. Thirty-two percent of mollusk farm or business respondents reported experiencing production challenges not related to labor. Forty-six percent of mollusk farm respondents reported “other” challenges for production, of which seed was the primary challenge. Several respondents mentioned challenges with obtaining new seed or being able to pay for seed orders due to a current lack of revenue. A few respondents also commented that holding market ready product on their farms is preventing them from planting new seed, which will

have longer term effects on their business. Some respondents likewise noted that it was not possible to obtain additional gear or equipment to expand their ability to hold product or plant new seed. Sixteen percent of respondents reported increased costs for production. Comments related to increased costs of production were in reference to the cost of moving product to markets or holding market ready products. Respondents also noted challenges with obtaining specialized equipment or services for repair or maintenance. Vessel repair and fabrication were specifically mentioned by respondents. A few respondents noted interruptions in construction services that will lead to additional costs to complete those projects in the future.

**Nearly half (48%) of mollusk respondents indicated that they could hold market-ready product for 1 to 3 months before it would interfere with future crops.** Twenty-two percent said that they could hold market-ready product for 4 to 6 months before it would become a problem for future crops or plantings, and 11% said that they could hold market-ready product for less than 1 month before experiencing consequence for future crops. Only 7% of respondents could hold market-ready product for more than 10 months before experiencing issues with new crops or plantings. As noted earlier, several respondents indicated concerns about a lack of space for new seed. A few respondents noted that holding market ready product was increasing the density of product in their culture units, potentially leading to increased mortalities. Some respondents noted that their products were sensitive to the warmer water temperatures which could increase mortalities if products are not harvested soon; resulting in fewer sales.

Compounding the challenges described above is that larger shellfish are often less marketable and bring lower prices. Many respondents commented that products (especially half-shell oysters) would grow beyond the target market size before markets opened back up, making them less valuable. Clam farms and businesses also noted that holding product would lead to reduced value. Several respondents commented on reduced quality of larger products, which would affect price, and general increased risk of keeping product in the water longer. These comments included discussion about the potential for diseases to cause mortality, crowding of culture

units as product sizes increased, and natural mortality of products due to age. A few respondents expressed concerns that the ideal marketing period for their products had already passed and that their only recourse was to sell at reduced prices or dump their product. A few respondents indicated concerns about product prices falling in response to an influx of supply when markets re-open.

Challenges related to production inputs (feed, therapeutants, etc.) were reported by 22% of mollusk farm respondents. Additional production challenges reported by mollusk farm respondents included: challenges with repair, construction, consulting, or engineering services (36%), financial services (31%), and 17% of respondents who could not specify specific production challenges at this time.

Financial services challenges mentioned by respondents included: loan service needs for the 2020 growing season, not being able to pay off equipment loans and other financial obligations due to not being able to generate revenue. A few respondents noted challenges with obtaining loans or financing due to their inability to demonstrate sales or unfavorable financial positions (debt/asset ratio). In terms of expectations for the coming months, 45% of respondents expected to face labor challenges, 42% expected to face production challenges, and 23% of respondents expected increased costs of production.

### **Marketing of products**

**Sixty-nine percent of respondents indicated that holding market-ready product would make it less marketable in the future. Seventy-nine percent responded that holding product would result in a reduced quantity sold and 74% responded it would result in a reduced price for products.** A few respondents expressed concerns that the ideal marketing period for their product had already passed (March – April). One respondent expressed concerns about a long term loss of demand for their product. A few respondents expressed concerns about dropping prices as farms and businesses rush to sell product when markets reopen. Several respondents expressed challenges in switching to a new marketing channel. One such comment discussed the inability for employees to obtain necessary certifications and training to be able to sell direct to consumers. Another comment in a similar

vein expressed challenges with obtaining the necessary licenses to adjust their marketing strategy. One respondent expressed challenges with trucking and delivery to get products to consumers. A different respondent commented that missing their ideal marketing period would result in them foregoing any sales in 2020. Several respondents commented that they have no ability to generate revenue without sales.

### **Increased Demand for Products**

Two percent of mollusk respondents reported increased demand for their products. Of those respondents that indicated an increased demand for their products, 25% could not estimate the value of increased sales at the time of completing the survey. The remaining respondents either experienced between \$5,001 and \$10,000 in increased sales (25%), between \$1 and \$1,000 (25%), or chose not to respond to this question (25%).

### **Assistance to Farms/Businesses**

The survey also included questions on the types of assistance that might be helpful to the farm or business of respondents. Seventy-two percent of mollusk respondents indicated that federal assistance would increase the likelihood of survival of their farm or business. Fifty-seven percent said that assistance from the state, 28% from local government, and 19% from associations would be helpful.

When asked more specifically about the types of assistance that would be helpful to their farm or business, 40% of respondents said that waiving or delaying state fees would be helpful, 32% said assistance identifying new markets, 31% said loan guarantees, 27% said specialty crop insurance, and 8% said tariff relief. Fifteen percent of respondents suggested other measures that would be helpful to their farm or business. Several respondents commented that grant programs at state or federal levels would be helpful to their farm or business. A couple of respondents specifically mentioned support for buying and planting seed. A few respondents mentioned that loans were not helpful given their current financial positions. One respondent mentioned support from Extension to stay informed of current financial, insurance, and market opportunities. Another respondent commented on debt forgiveness programs, while

another mentioned financial support programs for shellfish farms that should parallel government programs for disaster relief for lost income to fishermen. When asked if there were existing programs for which their farm or business does not currently qualify that would be of assistance during the pandemic, only 14% said, “Yes,” with 11% saying, “No,” and 75% did not respond to this question.

Additional comments by mollusk respondents included a variety of suggestions regarding insurance products. These comments focused on the need for better insurance products and the risks of holding product for extended periods of time due to natural disasters (hurricanes and storms). Respondents also provided additional comments on the topic of assistance for identifying new markets. Many of these comments focused on assistance establishing direct to consumer marketing channels. Some respondents commented that encouraging the consumption of mollusks in the home would be helpful to their business. A couple of respondents suggested it would be helpful to have assistance with establishing export markets for their products.

The most common comments made by mollusk farm and businesses respondents to the survey centered on grants and cash payments to farms. The second-most frequent comments were related to various forms of financial services, including loan guarantees, low-interest loans, debt forgiveness, exemption of interest payments, and deferred loan payments. Additional suggestions focused on programs to buy less-marketable shellfish for restoration purposes. In addition, a few respondents made comments about requiring additional funding through the CARES Act.

At the state level, several respondents made comments about grants and cash payment programs. There were also comments made by respondents about suspending certain requirements or waiving fees for licenses and permits; some focusing specifically on barriers to transition towards direct to consumer sales. A few respondents suggested that states should purchase oysters for restoration purposes while markets remain closed. One respondent commented that it would be helpful if states could enact emergency leases to allow for expansion to hold market ready product so that it

would not interfere with future crop plantings. A few comments suggested that states waive or temporarily reduce state taxes.

At the local level, comments focused primarily on the need to promote local sales and consumption of local products. A few comments addressed keeping local markets open to provide an avenue to sell direct to consumers. A few comments also mentioned the delay of local lease fees and property taxes would be helpful to farms or businesses.

Beyond government assistance, mollusk respondents also suggested ways for aquaculture associations to help their farms or business. The majority of comments focused on continued promotion and advocacy for U.S. raised aquaculture products. A few comments suggested providing information on financial, marketing, and training programs to help farms and businesses. One comment suggested the organization of a “drive through” seafood market, while another suggested organizing a seafood festival when markets reopen.

## Discussion and Conclusion

Responses by mollusk farms and businesses to the Quarter 1 survey show that the U.S. mollusk industry has been severely impacted by the COVID-19 pandemic. Nearly all (98%) responding mollusk farms or businesses had experienced lost sales, with 90% having had orders from private companies canceled and 6% having had government (state/federal) orders canceled. One respondent reported losses for the first quarter of 2020 of \$5 million, with another respondent estimating lost sales for 2020 to be \$15 million. While lost sales were the immediate impact for farms and businesses, other challenges were mentioned related production challenges, financing, and other essential services that are critical to survival of the farm or business. A majority of respondents (69%) indicated that holding market ready product would make it less marketable in the future; with consequences for sales volumes, sales prices, but also the ability of farms to purchase and plant new seed. This suggests longer term consequences for mollusk farms and businesses that will likely extend beyond 2020. Of serious concern is that only 24% of mollusk farm and business respondents indicated that their farm or business

would survive the next 3 months without external assistance. There is a critical need to find solutions for the challenges identified by mollusk farms/businesses. Given that survey results showed that there will be longer-term effects on the U.S. mollusk industry (only 7% of respondents indicated they were confident of surviving 12 months without external intervention), it will be important to continue to monitor changes throughout the year. Key findings from mollusk farm and business respondents include:

- *97% have been impacted by COVID-19*
- *90% have had private orders/contracts canceled*
- *66% have or will soon have to lay off employees*
- *98% have experienced lost sales*
- *24% can survive 3 months without external intervention*

## References

- United States Department of Agriculture. 2019. 2018 Census of Aquaculture. National Agricultural Statistics Service, USDA, Washington, District of Columbia, USA. Accessed April 2020 at: [https://www.nass.usda.gov/Surveys/Guide\\_to\\_NASS\\_Surveys/Census\\_of\\_Aquaculture/index.php](https://www.nass.usda.gov/Surveys/Guide_to_NASS_Surveys/Census_of_Aquaculture/index.php). (last accessed, April 12<sup>th</sup>, 2020)
- van Senten, J., Smith, M.A., and Engle, C.R. 2020. Impacts of COVID-19 on U.S. aquaculture, aquaponics, and allied businesses: Quarter 1 Results. AAEC-218NP. Available at: [https://www.pubs.ext.vt.edu/content/dam/pubs\\_ext\\_vt\\_edu/AAEC/aaec-218/AAEC-218.pdf](https://www.pubs.ext.vt.edu/content/dam/pubs_ext_vt_edu/AAEC/aaec-218/AAEC-218.pdf)

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2020

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VSG-20-14

# Appendix

## Summary of COVID-19 impacts on U.S. Mollusk

### Quarter 1 Results

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*Carole R. Engle, Engle-Stone Aquatics, LLC, Virginia Tech*  
*Matthew A. Smith, The Ohio State University*





## Contents

Q1. Has your farm or business been impacted by the coronavirus disease (COVID-19)?.....	5
Q1.1. Does your farm or business expect to be affected by the coronavirus disease (COVID-19) in 2020?5	
Q2. Has your farm or business had government (state or federal) contracts canceled for 2020 because of the coronavirus disease (COVID-19)?.....	6
Q3. Has your farm or business had private contracts / orders canceled for 2020 because of the coronavirus disease (COVID-19)? .....	6
Q4. Has your farm or business had to lay off any employees due to the coronavirus disease (COVID-19)? .....	7
Q4.1. Are any of the employees that your farm or business had to, or will have to, lay off due to the coronavirus disease (COVID-19) designated as "Short-Time" or "Shared-Work" employees?.....	7
Q4.2. How many employees has your farm or business had to lay off in response to the coronavirus disease (COVID-19)? .....	8
Q4.3. How many weeks before your farm or business will have to make a decision to lay off employees, in response to the coronavirus disease (COVID-19)? .....	8
Q4.4. How many employees do you estimate your farm or business will have to lay off in response to the coronavirus disease (COVID-19)? .....	9
Q5. Has your farm or business had any employees miss work due to the coronavirus disease (COVID-19)? .....	9
Q5.1. In total, approximately how many days have any employees in your farm or business missed work due to the coronavirus disease (COVID-19)?.....	10
Q6. Does your farm or business make use of H2A or H2B workers?.....	10
Q6.1. Has your farm or business been able to secure H2A and H2B workers during the coronavirus disease (COVID-19) pandemic?.....	11
Q6.2. Is your farm or business currently at risk of losing H2A or H2B workers due to the coronavirus disease (COVID-19) pandemic?.....	11
Q7. Has your farm or business experienced any of the following as a result of the coronavirus disease (COVID-19) in 2020? Please select all that apply.....	12
Q7.1. Has your farm or business experienced lost sales to international or export markets (outside of the United States), as a result of the coronavirus disease (COVID-19)?.....	12
Q7.2. If your farm or business has experienced lost sales as a result of the coronavirus disease (COVID-19), please estimate the value of lost sales? .....	13
Q7.3. If your farm or business has experienced production challenges (not related to labor) as a result of the coronavirus disease (COVID-19), can those challenges be specified? Please select all that apply. ....	14
Q7.6. If your farm or business has experienced increased demand for products as a result of the coronavirus disease (COVID-19), please estimate the value of those effects on sales? .....	15
Q8. Does your farm or business expect to experience any of the following as a result of the coronavirus disease (COVID-19) in 2020? Please select all that apply. ....	16
Q8.1. Does your farm or business expect to experience lost sales to international or export markets (outside of the United States), as a result of the coronavirus disease (COVID-19)? .....	16

Q8.2. Does your farm or business expect to experience lost sales as a result of the coronavirus disease (COVID-19), please estimate the value of lost sales? .....17

Q8.3. Does your farm or business expect to experience production challenges (not related to labor) as a result of the coronavirus disease (COVID-19), can those challenges be specified? Please select all that apply. ....18

Q8.6. Does your farm or business expect to experience increased demand for products as a result of the coronavirus disease (COVID-19), please estimate the value of those effects on sales? .....19

Q9. Without external intervention (for example, governmental assistance), will your farm or business survive in the next 3 (three) months? .....20

Q10. Without external intervention (for example, governmental assistance), will your farm or business survive in the next 6 (six) months?.....20

Q11. Without external intervention (for example, governmental assistance), will your farm or business survive in the next 12 (twelve) months?.....21

Q12. How many months can your farm or business survive without sales, as a result of the coronavirus disease (COVID-19), before suffering longer term cash flow effects?.....21

Q13. Will holding market ready product, as a result of the coronavirus disease (COVID-19), make it less marketable?.....22

Q13.1. Will holding market ready product, as a result of the coronavirus disease (COVID-19), result in: Please select all that apply. ....22

Q14. How many months can your farm or business hold market ready product, as a result of the coronavirus disease (COVID-19), before it becomes an issue for new crops or planting?.....23

Q16. Are there specific steps or types of assistance that would increase the likelihood for your farm or business to survive? Please select all that apply. ....24

Q17. Would assistance with any of the following be helpful to your farm or business right now? Please select all that apply. ....24

Q18. Are there any existing programs that your aquaculture, aquaponics, or allied business does not currently qualify for, that would increase the likelihood of survival of your farm or business?.....25

Q19. What is the primary product that your farm or business produces? .....26

Q19.1. Please indicate which is the major species of foodfish raised by your farm or business: .....26

Q20. How does your farm or business primarily market or sell aquaculture / aquaponics products? .....27

Q21. Please indicate the scale of your farm or business by annual sales volume before the effects of coronavirus disease (COVID-19): .....28

Q22. In which USDA defined Aquaculture Region is your farm or business located? .....29

# Overview

On March 23<sup>rd</sup>, 2020 Virginia Tech Seafood AREC and The Ohio State University Extension initiated an online survey of the U.S. aquaculture, aquaponics, and allied businesses. This survey was designed to capture and quantify the effects of the coronavirus disease (COVID-19) on the aquaculture, aquaponics, and allied industries. The survey closed April 10<sup>th</sup>, 2020 at 11:59 pm. The survey will be distributed at the conclusion of every quarter for 2020, to attempt to capture the evolving impacts of COVID-19 over time.

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This report is a supplemental report to the **Mollusk Report Summary, Quarter 1** that summarizes results of **mollusk farm** respondents.

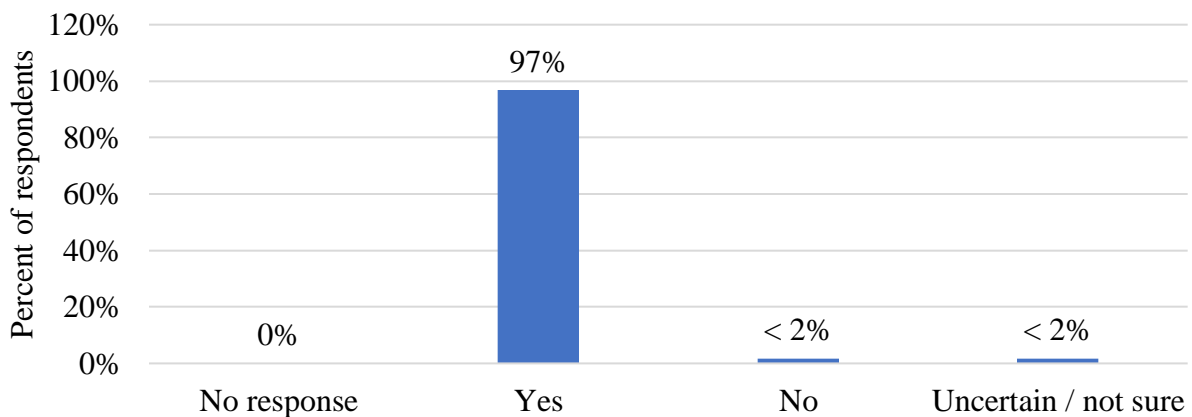
# Survey results for each question

The number of respondents to each question presented in this summary is denoted as (n = ).

## Q1. Has your farm or business been impacted by the coronavirus disease (COVID-19)?

(n = 184)

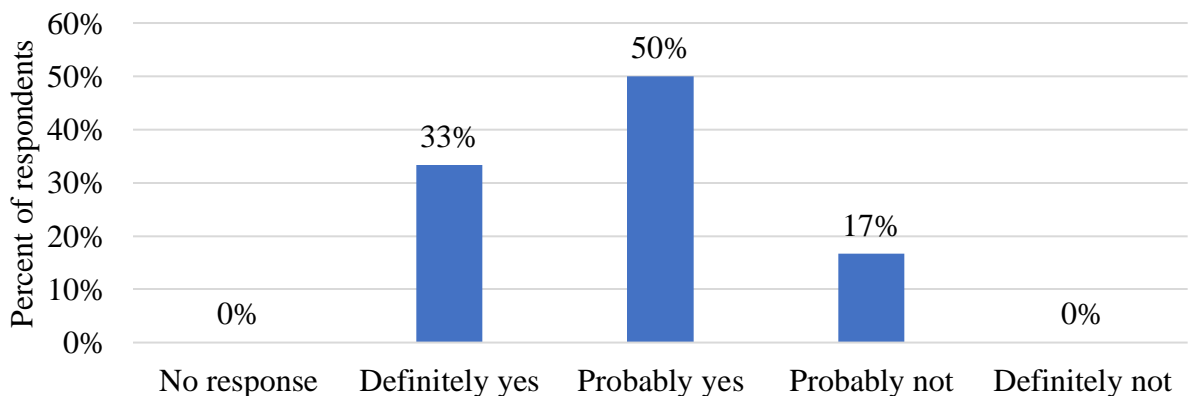
- No response : 0%
- Yes : 97%
- No : < 2%
- Uncertain / Not Sure : < 2%



## Q1.1. Does your farm or business expect to be affected by the coronavirus disease (COVID-19) in 2020?

(n = 6)

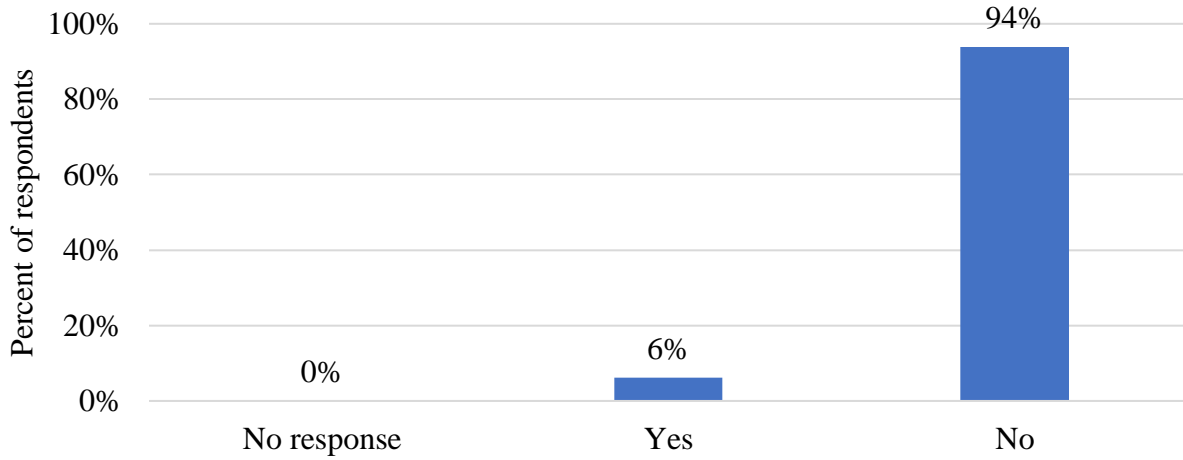
- No response : 0%
- Definitely yes : 33%
- Probably yes : 50%
- Probably not : 17%
- Definitely not : 0%



**Q2. Has your farm or business had government (state or federal) contracts canceled for 2020 because of the coronavirus disease (COVID-19)?**

(n = 178)

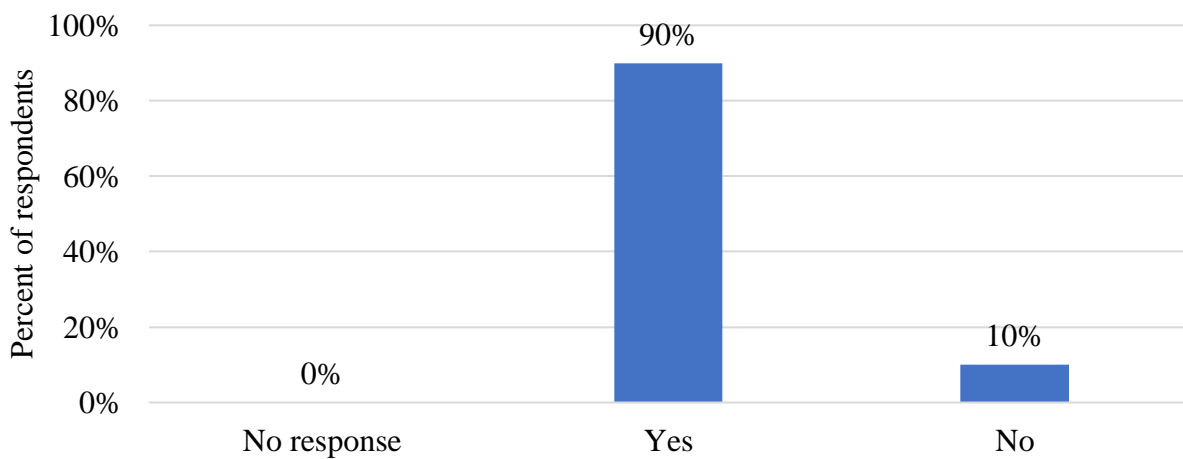
- No response : 0%
- Yes : 6%
- No : 94%



**Q3. Has your farm or business had private contracts / orders canceled for 2020 because of the coronavirus disease (COVID-19)?**

(n = 178)

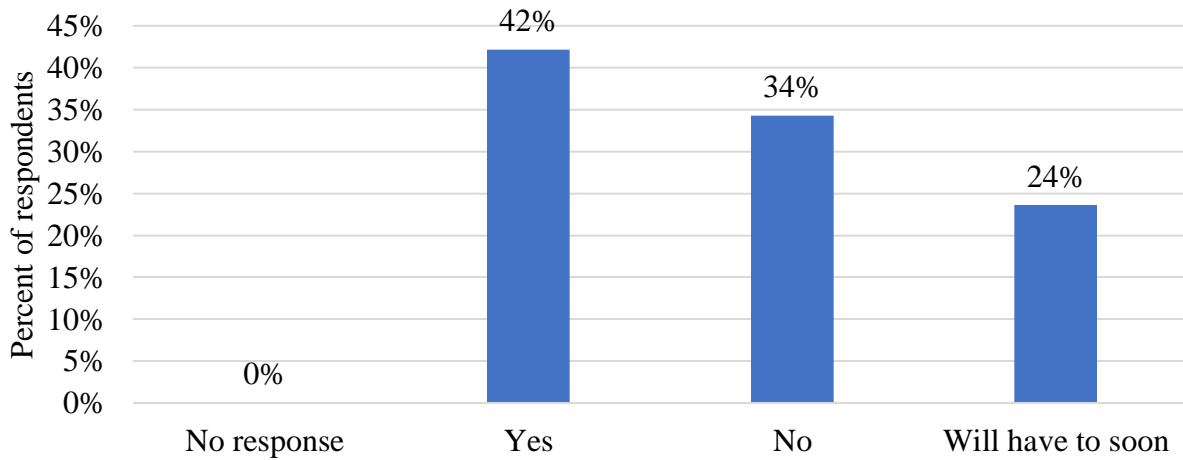
- No response : 0%
- Yes : 90%
- No : 10%



**Q4. Has your farm or business had to lay off any employees due to the coronavirus disease (COVID-19)?**

(n = 178)

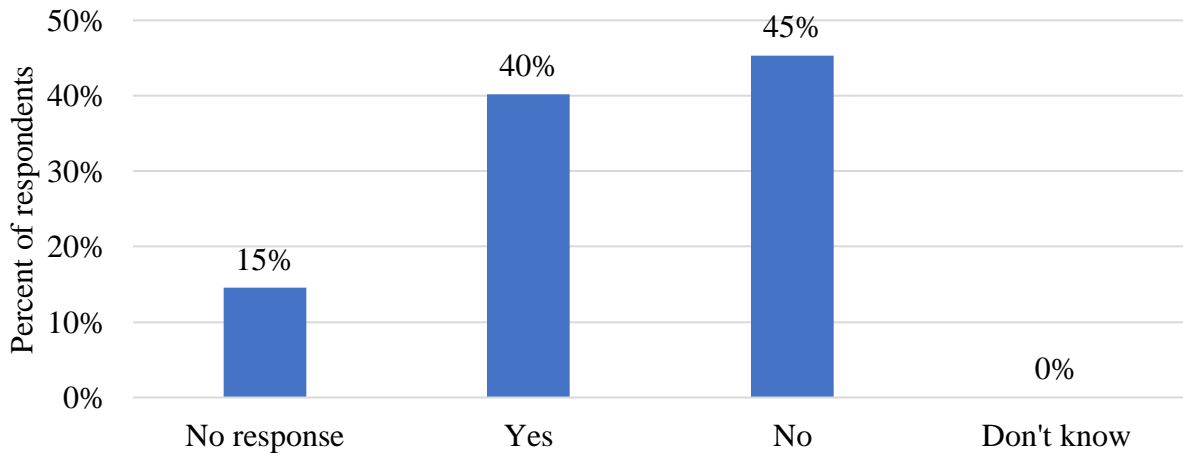
- No response : 0%
- Yes : 42%
- No : 34%
- Will have to soon : 24%



**Q4.1. Are any of the employees that your farm or business had to, or will have to, lay off due to the coronavirus disease (COVID-19) designated as "Short-Time" or "Shared-Work" employees?**

(n = 117)

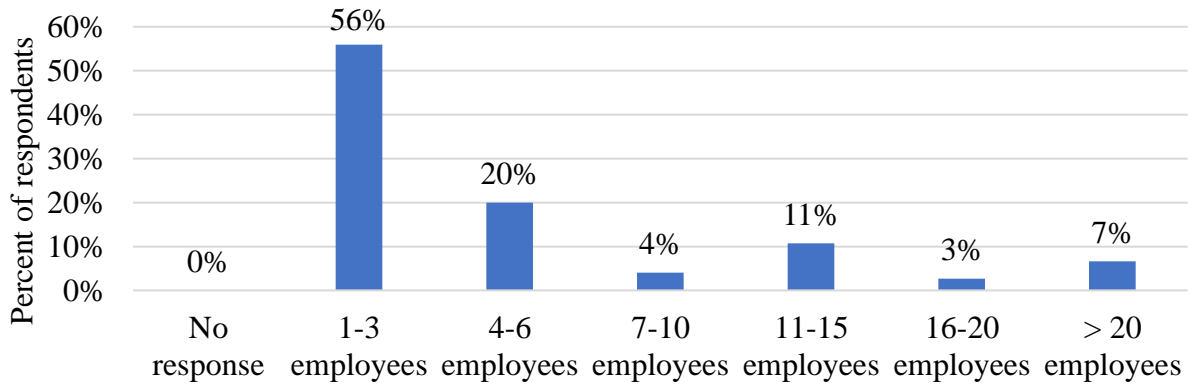
- No response : 15%
- Yes : 40%
- No : 45%
- Don't know : 0%



**Q4.2. How many employees has your farm or business had to lay off in response to the coronavirus disease (COVID-19)?**

(n = 75)

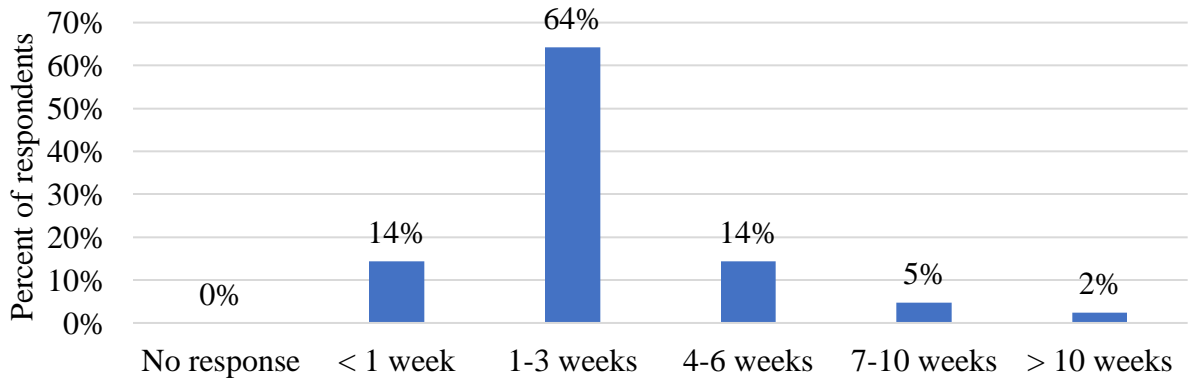
- No response : 0%
- 1 – 3 employees : 56%
- 4 – 6 employees : 20%
- 7 – 10 employees : 4%
- 11 – 15 employees : 11%
- 16 – 20 employees : 13%
- More than 20 employees : 7%



**Q4.3. How many weeks before your farm or business will have to make a decision to lay off employees, in response to the coronavirus disease (COVID-19)?**

(n = 42)

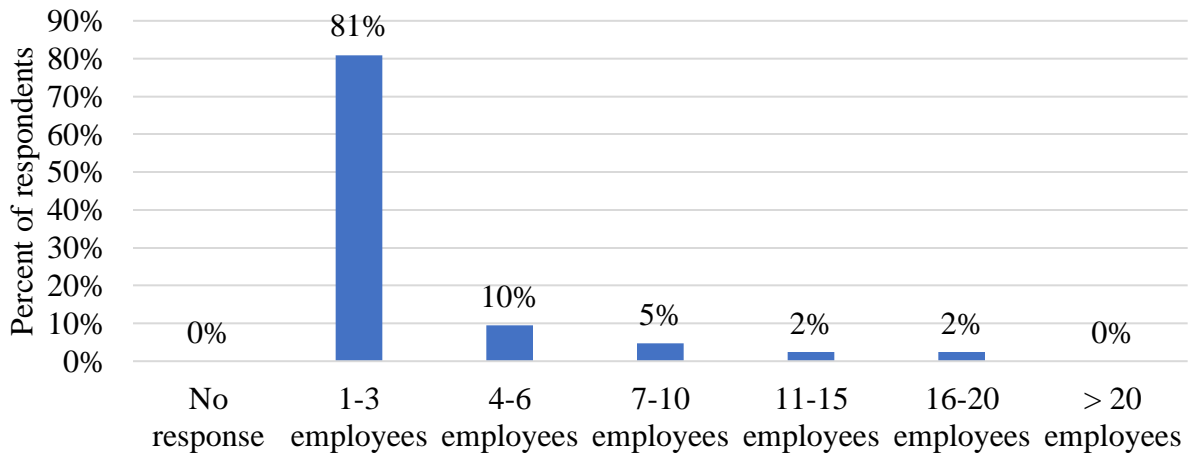
- No response : 0%
- Less than 1 week : 14%
- 1 – 3 weeks : 64%
- 4 – 6 weeks : 14%
- 7 – 10 weeks : 5%
- More than 10 weeks : 2%



**Q4.4. How many employees do you estimate your farm or business will have to lay off in response to the coronavirus disease (COVID-19)?**

(n = 42)

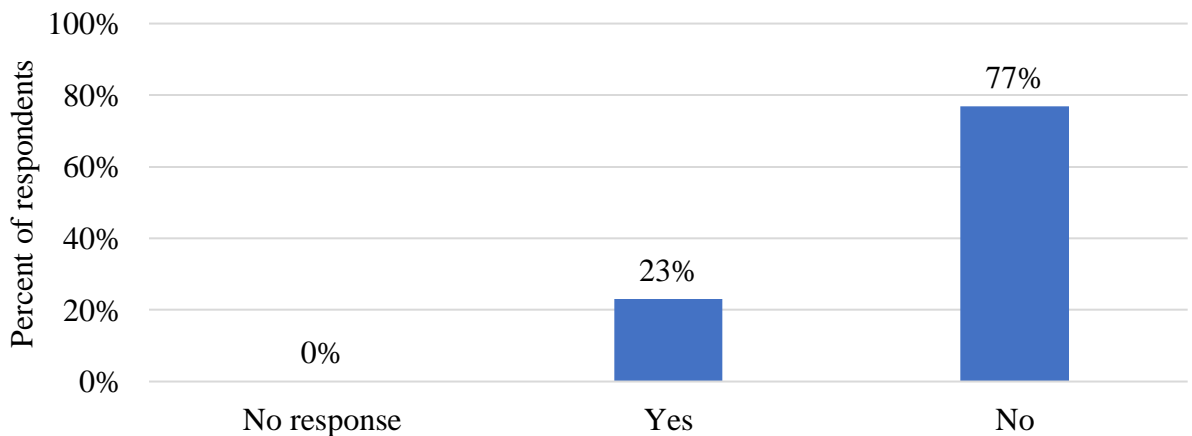
- No response : 0%
- 1 – 3 employees : 81%
- 4 – 6 employees : 10%
- 7 – 10 employees : 5%
- 11 – 15 employees : 2%
- 16 – 20 employees : 2%
- More than 20 employees : 0%



**Q5. Has your farm or business had any employees miss work due to the coronavirus disease (COVID-19)?**

(n = 178)

- No response : 0%
- Yes : 23%
- No : 77%

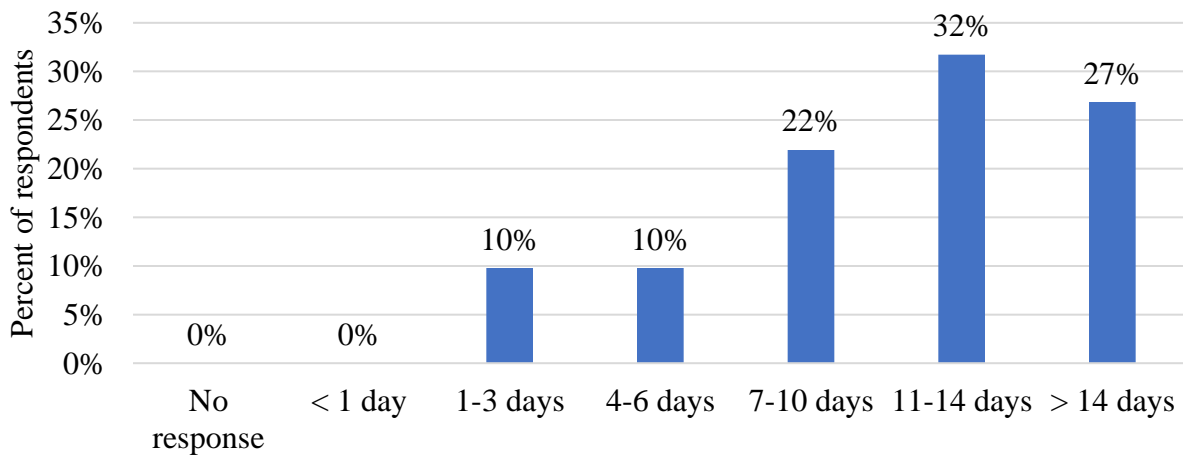




**Q5.1. In total, approximately how many days have any employees in your farm or business missed work due to the coronavirus disease (COVID-19)?**

(n = 41)

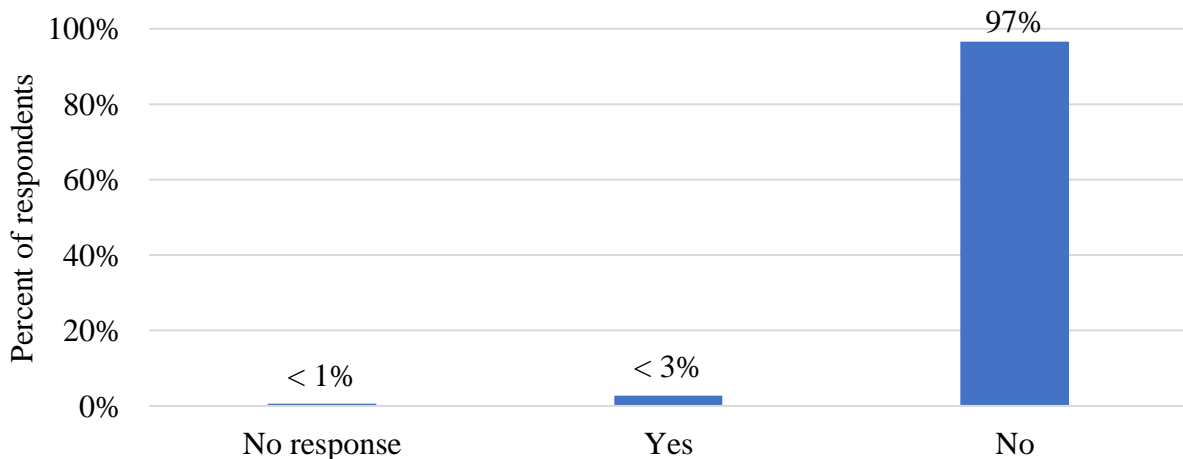
- No response : 0%
- Less than a day : 0%
- 1 -3 days : 10%
- 4 – 6 days : 10%
- 7 – 10 days : 22%
- 11 – 14 days : 32%
- More than 14 days : 27%



**Q6. Does your farm or business make use of H2A or H2B workers?**

(n = 178)

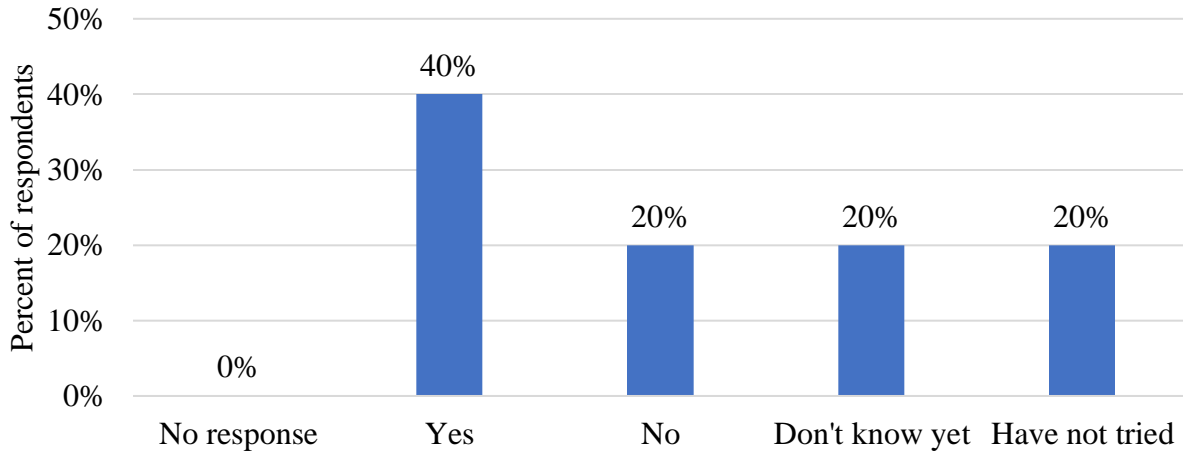
- No response : < 1%
- Yes : < 3%
- No : 97%



**Q6.1. Has your farm or business been able to secure H2A and H2B workers during the coronavirus disease (COVID-19) pandemic?**

(n = 5)

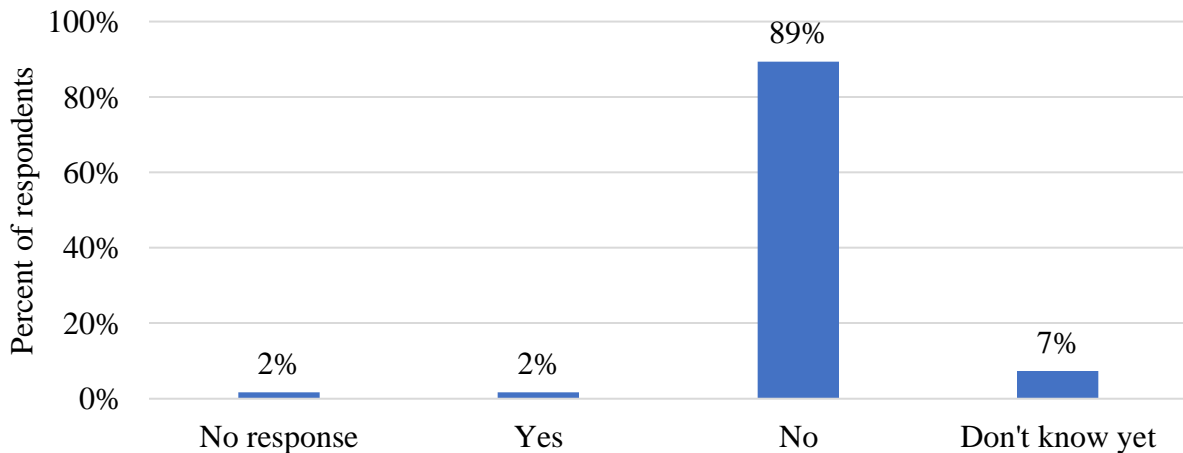
- No response : 0%
- Yes : 40%
- No : 20%
- Don't know yet : 20%
- Have not tried : 20%



**Q6.2. Is your farm or business currently at risk of losing H2A or H2B workers due to the coronavirus disease (COVID-19) pandemic?**

(n = 178)

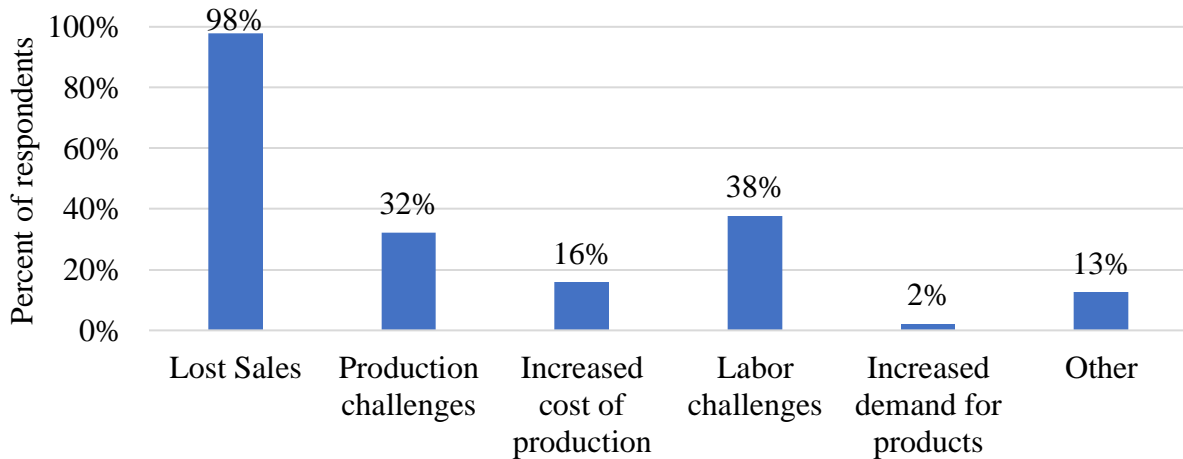
- No response : 2%
- Yes : 2%
- No : 89%
- Don't know yet : 7%



**Q7. Has your farm or business experienced any of the following as a result of the coronavirus disease (COVID-19) in 2020? Please select all that apply.**

(n = 183)

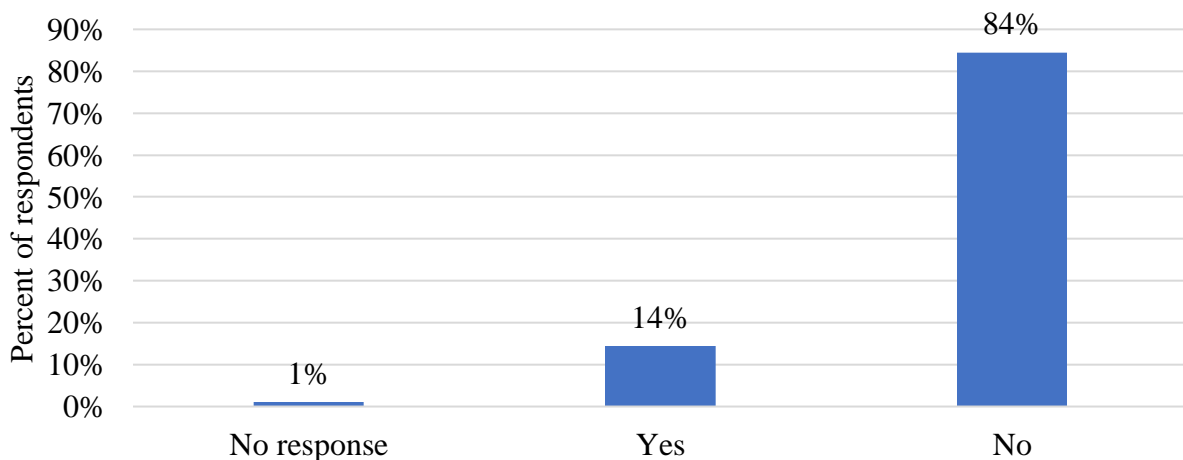
- Lost sales : 98%
- Production challenges (not related to labor) : 32%
- Increased cost of production : 16%
- Labor challenges : 38%
- Increased demand for products : 2%
- Other : 13%



**Q7.1. Has your farm or business experienced lost sales to international or export markets (outside of the United States), as a result of the coronavirus disease (COVID-19)?**

(n = 180)

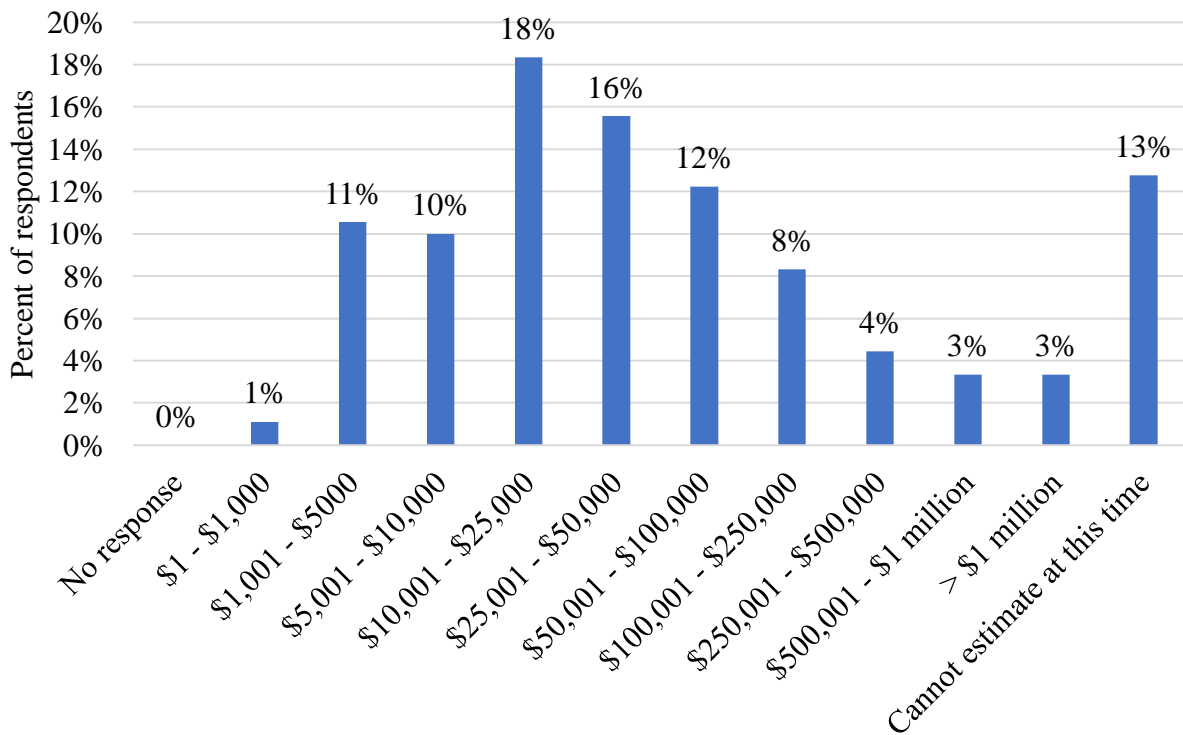
- No response : 1%
- Yes : 14%
- No : 84%



**Q7.2. If your farm or business has experienced lost sales as a result of the coronavirus disease (COVID-19), please estimate the value of lost sales?**

(n = 180)

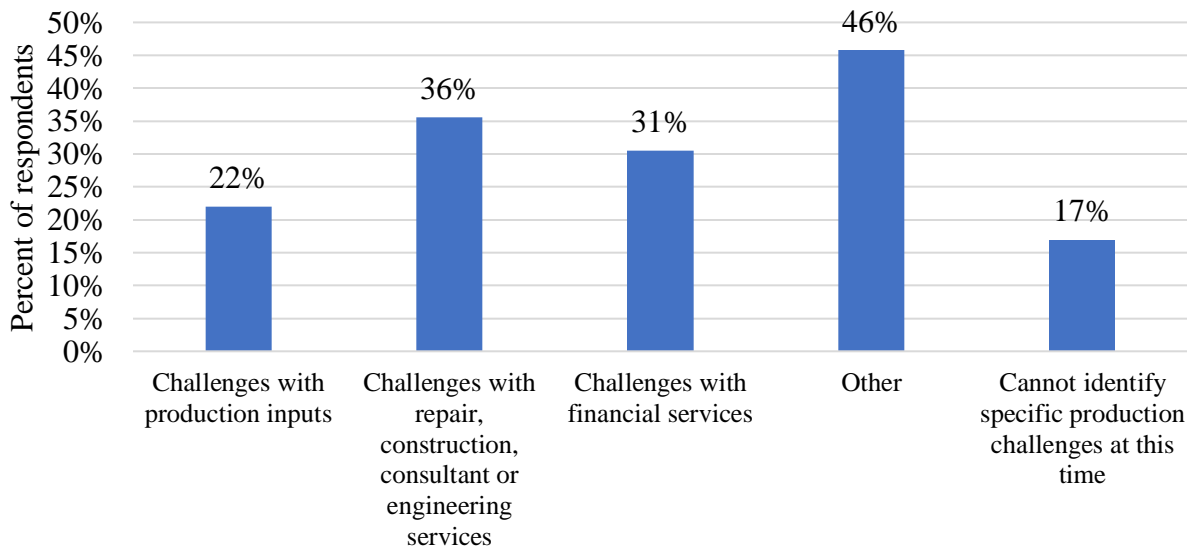
- No response : 0%
- \$1 - \$1,000 : 1%
- \$1,001 - \$5,000 : 11%
- \$5,001 - \$10,000 : 10%
- \$10,001 - \$25,000 : 18%
- \$25,001 - \$50,000 : 16%
- \$50,001 - \$100,000 : 12%
- \$100,001 - \$250,000 : 8%
- \$250,001 - \$500,000 : 4%
- \$500,001 - \$ 1million : 3%
- Greater than \$1 million : 3%
- Cannot estimate at this time : 13%



**Q7.3. If your farm or business has experienced production challenges (not related to labor) as a result of the coronavirus disease (COVID-19), can those challenges be specified? Please select all that apply.**

(n = 59)

- Challenges with production inputs (feed, chemicals, therapeutants, etc.)<sup>a</sup> : 22%
- Challenges with repair, construction, consultant or engineering services : 36%
- Challenges with financial services (operating loans, leases, etc.) : 31%
- Other : 46%
- Cannot identify specific production challenges at this time : 17%

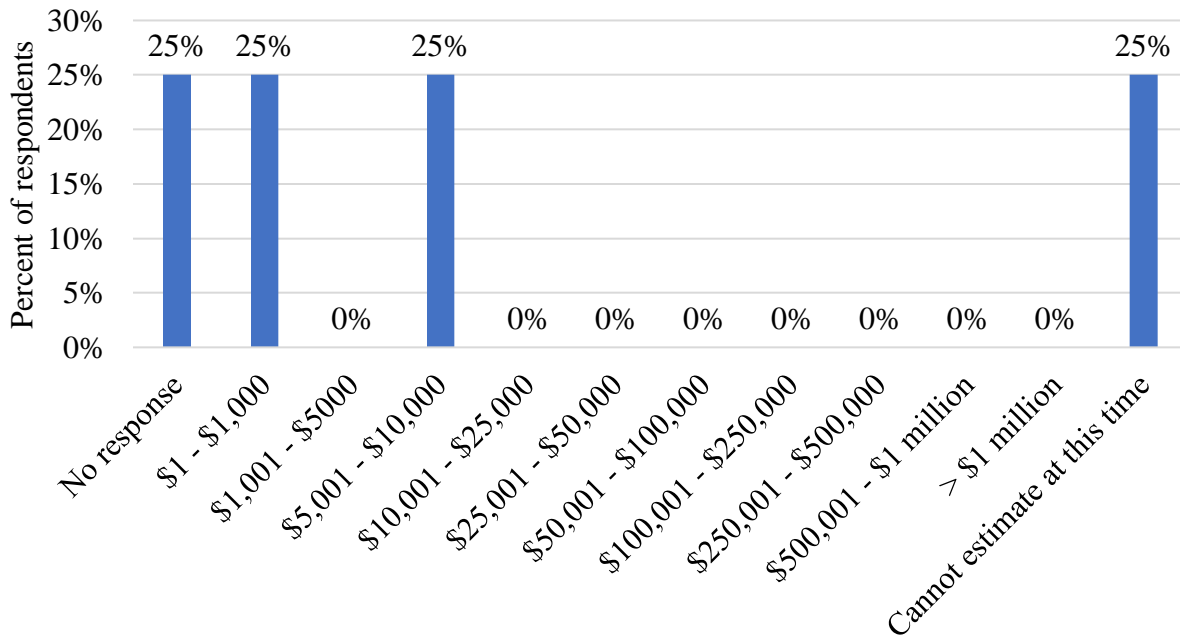


<sup>a</sup> In the case of mollusks, production inputs were primarily seed and gear/equipment to hold seed or market ready products. A few respondent comments also mentioned materials and supplies to build gear. Mollusk farms do not use feed or therapeutants.

**Q7.6. If your farm or business has experienced increased demand for products as a result of the coronavirus disease (COVID-19), please estimate the value of those effects on sales?**

(n = 4)

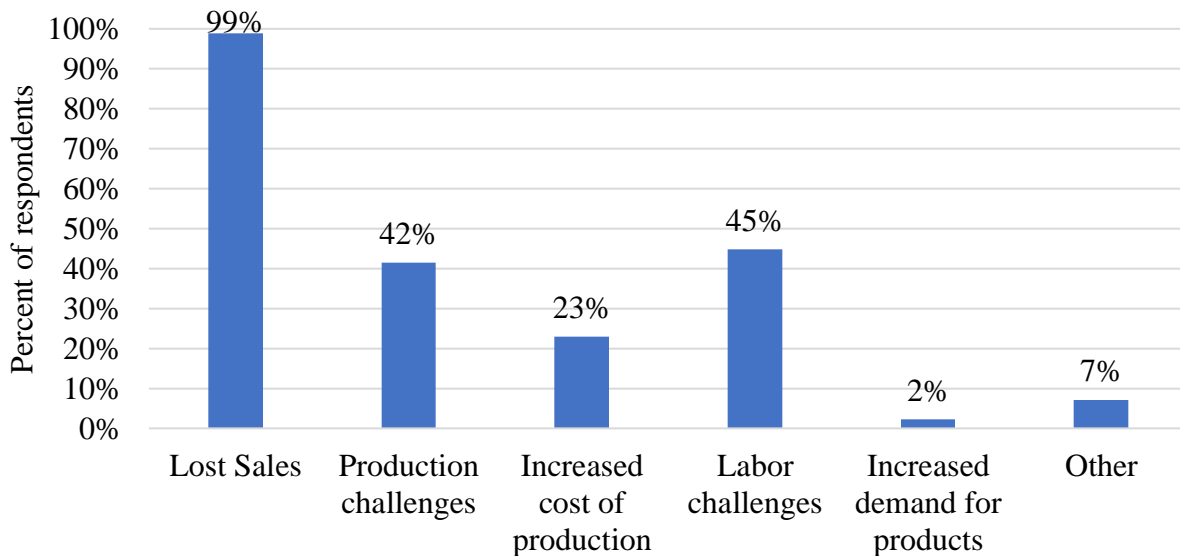
- No response : 25%
- \$1 - \$1,000 : 25%
- \$1,001 - \$5,000 : 0%
- \$5,001 - \$10,000 : 25%
- \$10,001 - \$25,000 : 0%
- \$25,001 - \$50,000 : 0%
- \$50,001 - \$100,000 : 0%
- \$100,001 - \$250,000 : 0%
- \$250,001 - \$500,000 : 0%
- \$500,001 - \$ 1million : 0%
- Greater than \$1 million : 0%
- Cannot estimate at this time : 25%



**Q8. Does your farm or business expect to experience any of the following as a result of the coronavirus disease (COVID-19) in 2020? Please select all that apply.**

(n = 183)

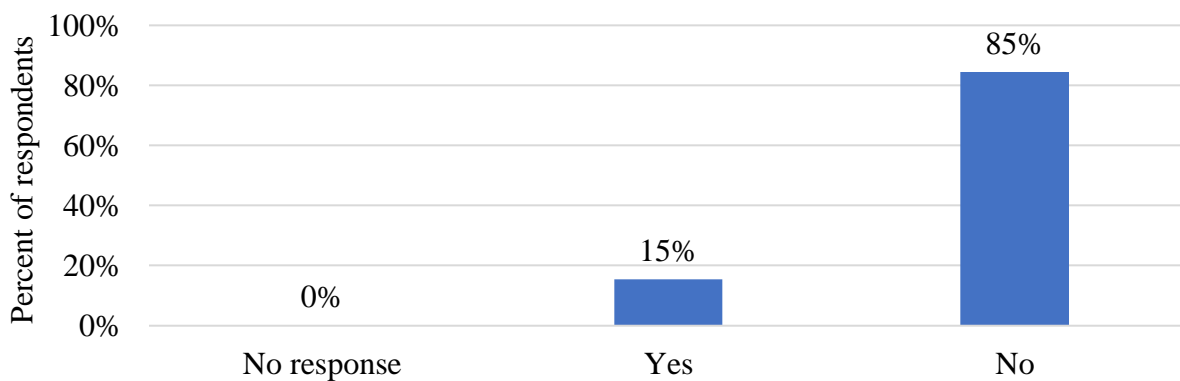
- Lost sales : 99%
- Production challenges (not related to labor) : 42%
- Increased cost of production : 23%
- Labor challenges : 45%
- Increased demand for products : 2%
- Other : 7%



**Q8.1. Does your farm or business expect to experience lost sales to international or export markets (outside of the United States), as a result of the coronavirus disease (COVID-19)?**

(n = 181)

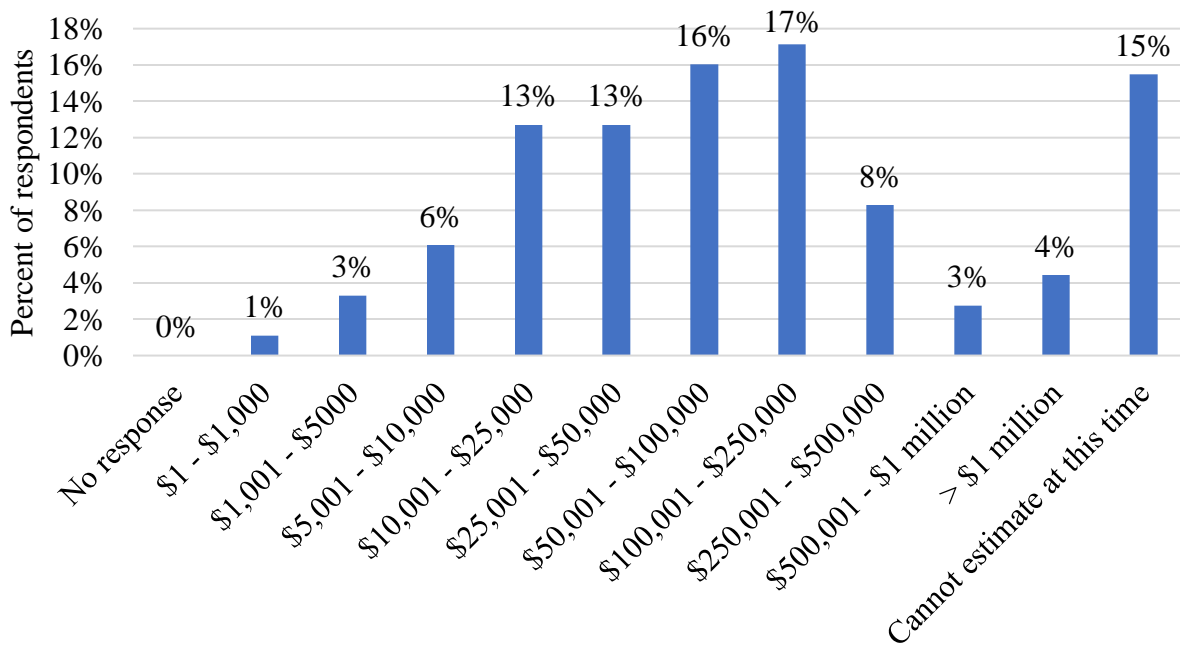
- No response : 0%
- Yes : 15%
- No : 85%



**Q8.2. Does your farm or business expect to experience lost sales as a result of the coronavirus disease (COVID-19), please estimate the value of lost sales?**

(n = 181)

- No response : 0%
- \$1 - \$1,000 : 1%
- \$1,001 - \$5,000 : 3%
- \$5,001 - \$10,000 : 6%
- \$10,001 - \$25,000 : 13%
- \$25,001 - \$50,000 : 13%
- \$50,001 - \$100,000 : 16%
- \$100,001 - \$250,000 : 17%
- \$250,001 - \$500,000 : 8%
- \$500,001 - \$ 1million : 3%
- Greater than \$1 million : 4%
- Cannot estimate at this time : 15%

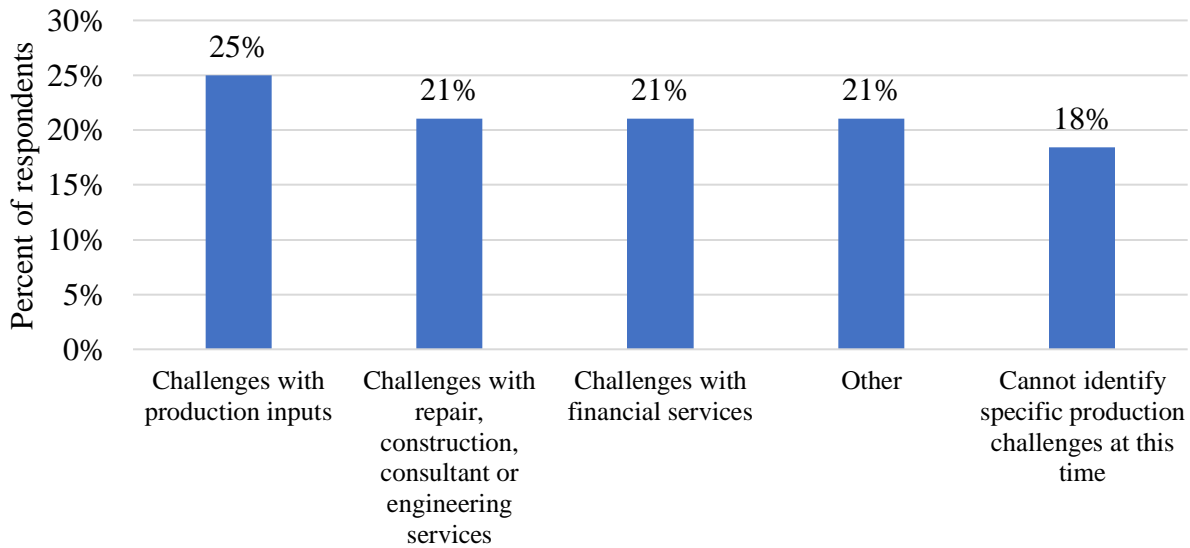




**Q8.3. Does your farm or business expect to experience production challenges (not related to labor) as a result of the coronavirus disease (COVID-19), can those challenges be specified? Please select all that apply.**

(n = 76)

- Challenges with production inputs (feed, chemicals, therapeutants, etc.)<sup>a</sup> : 25%
- Challenges with repair, construction, consultant or engineering services : 21%
- Challenges with financial services (operating loans, leases, etc.) : 21%
- Other : 21%
- Cannot identify specific production challenges at this time : 18%

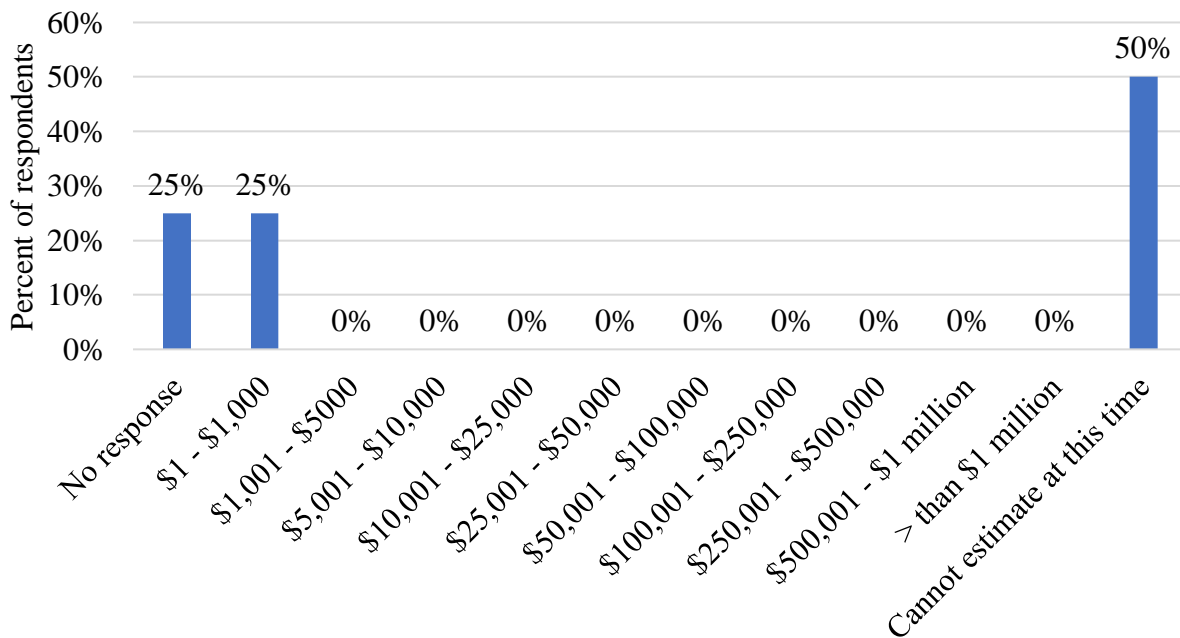


<sup>a</sup> In the case of mollusks, production inputs were primarily seed and gear/equipment to hold seed or market ready products. A few respondent comments also mentioned materials and supplies to build gear. Mollusk farms do not use feed or therapeutants.

**Q8.6. Does your farm or business expect to experience increased demand for products as a result of the coronavirus disease (COVID-19), please estimate the value of those effects on sales?**

(n = 4)

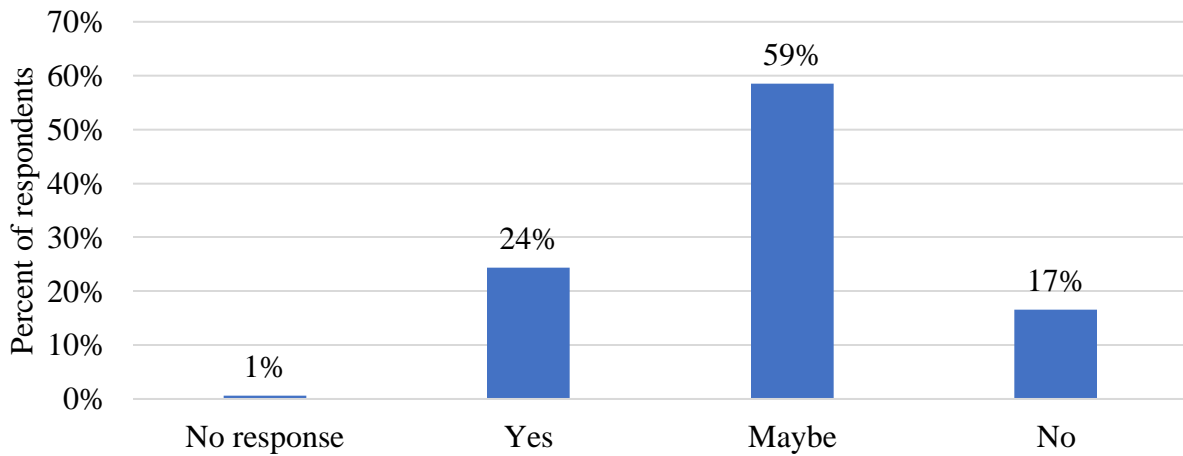
- No response : 25%
- \$1 - \$1,000 : 25%
- \$1,001 - \$5,000 : 0%
- \$5,001 - \$10,000 : 33%
- \$10,001 - \$25,000 : 0%
- \$25,001 - \$50,000 : 0%
- \$50,001 - \$100,000 : 0%
- \$100,001 - \$250,000 : 0%
- \$250,001 - \$500,000 : 0%
- \$500,001 - \$ 1million : 0%
- Greater than \$1 million : 0%
- Cannot estimate at this time : 50%



**Q9. Without external intervention (for example, governmental assistance), will your farm or business survive in the next 3 (three) months?**

(n = 181)

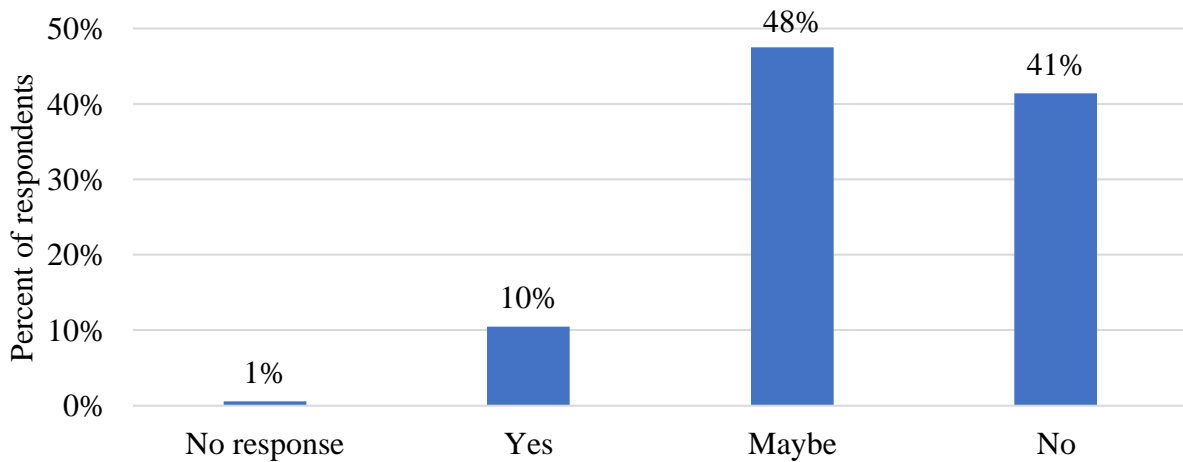
- No response : 1%
- Yes : 24%
- Maybe : 59%
- No : 17%



**Q10. Without external intervention (for example, governmental assistance), will your farm or business survive in the next 6 (six) months?**

(n = 181)

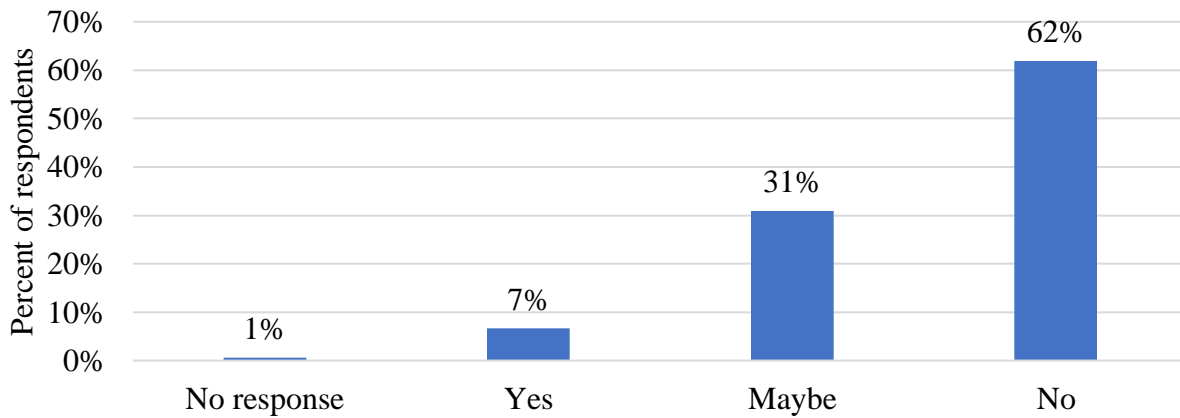
- No response : 1%
- Yes : 10%
- Maybe : 48%
- No : 41%



**Q11. Without external intervention (for example, governmental assistance), will your farm or business survive in the next 12 (twelve) months?**

(n = 181)

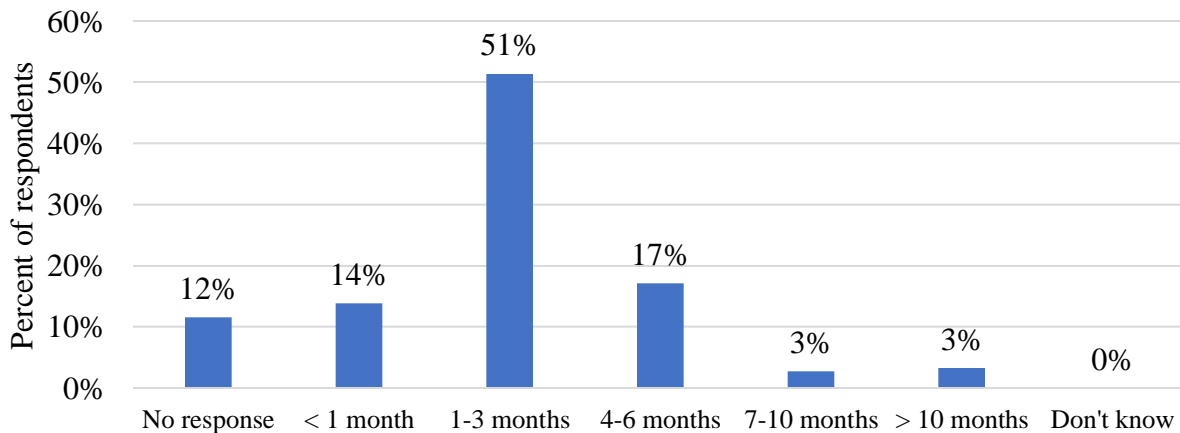
- No response : 1%
- Yes : 7%
- Maybe : 31%
- No : 62%



**Q12. How many months can your farm or business survive without sales, as a result of the coronavirus disease (COVID-19), before suffering longer term cash flow effects?**

(n = 181)

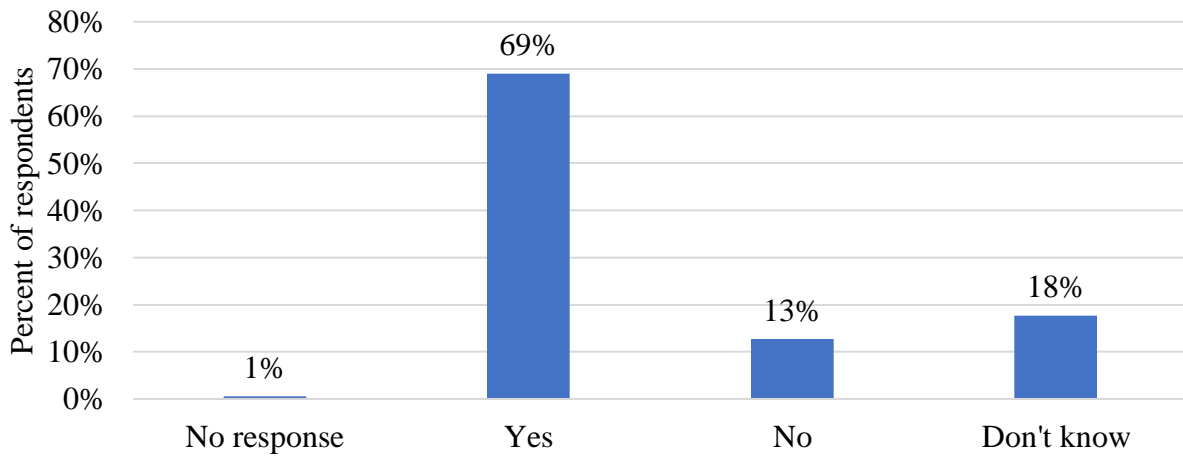
- No response : 12%
- Less than 1 month : 14%
- 1 – 3 months : 51%
- 4 – 6 months : 17%
- 7 – 10 months : 3%
- More than 10 months : 3%
- Do not know : 0%



**Q13. Will holding market ready product, as a result of the coronavirus disease (COVID-19), make it less marketable?**

(n = 181)

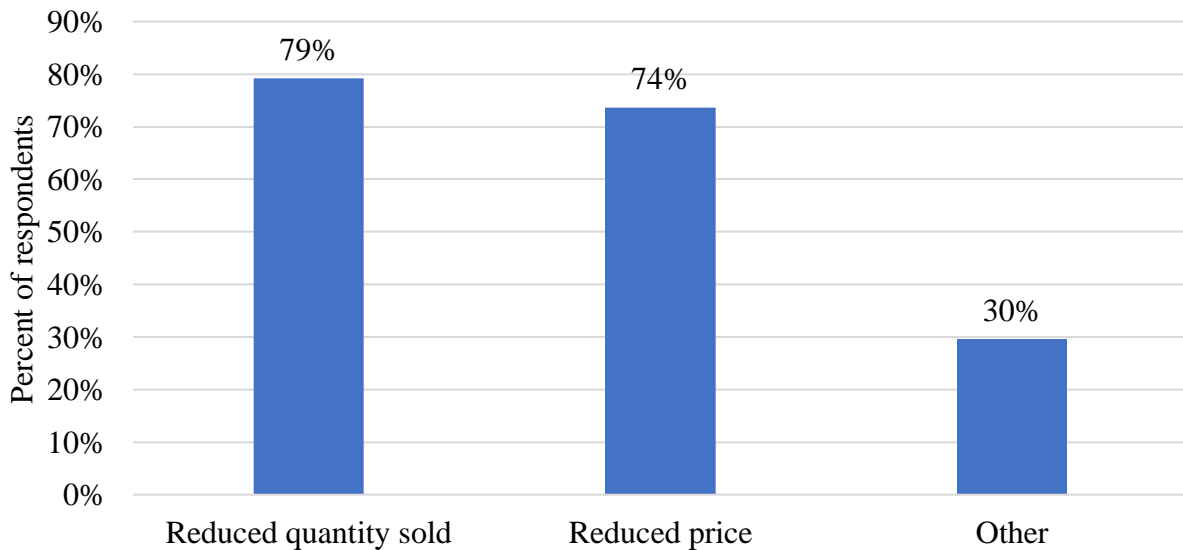
- No response : 1%
- Yes : 69%
- No : 13%
- Don't know : 18%



**Q13.1. Will holding market ready product, as a result of the coronavirus disease (COVID-19), result in: Please select all that apply.**

(n = 125)

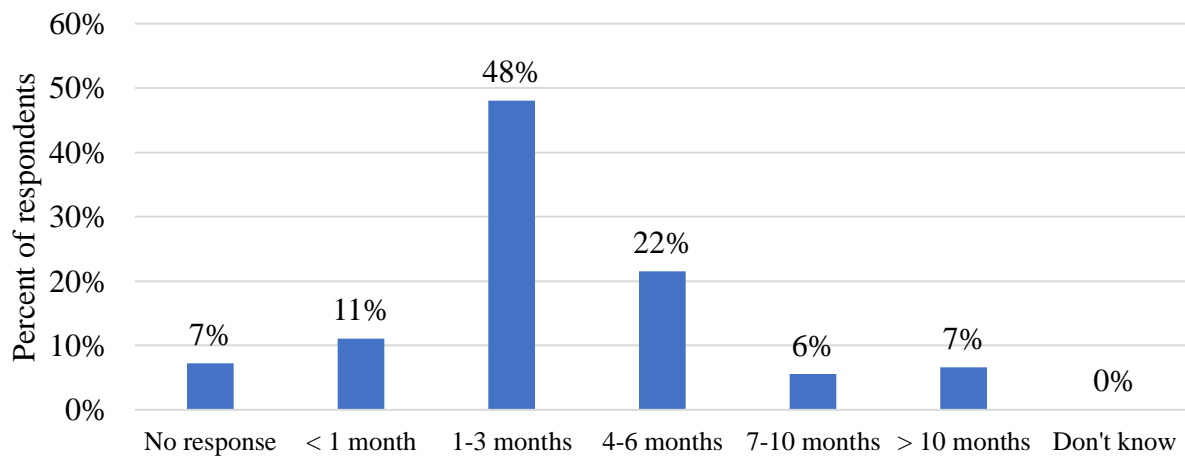
- Reduced quantity sold : 79%
- Reduced price : 74%
- Other : 30%



**Q14. How many months can your farm or business hold market ready product, as a result of the coronavirus disease (COVID-19), before it becomes an issue for new crops or planting?**

(n = 181)

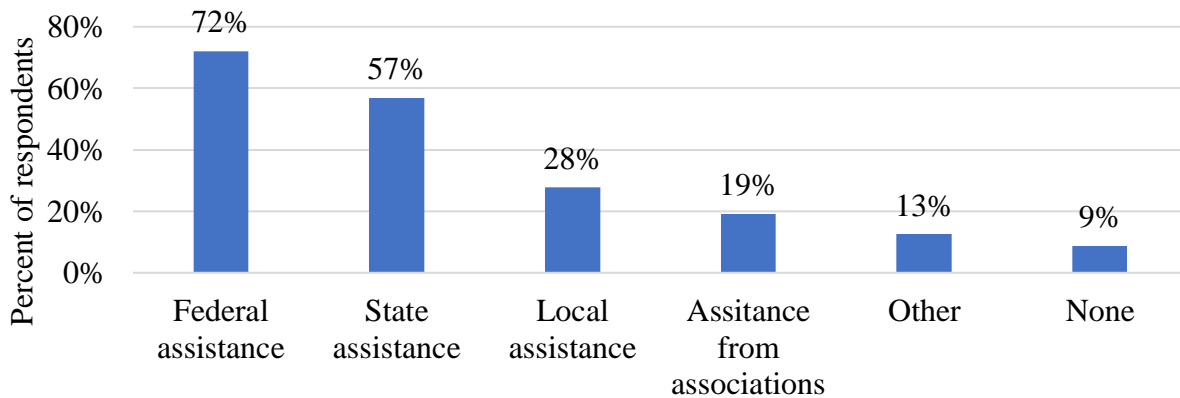
- No response : 7%
- Less than 1 month : 11%
- 1 – 3 months : 48%
- 4 – 6 months : 22%
- 7 – 10 months : 6%
- More than 10 months : 7%
- Don't know : 0%



**Q16. Are there specific steps or types of assistance that would increase the likelihood for your farm or business to survive? Please select all that apply.**

(n = 183)

- Federal assistance : 72%
- State assistance : 57%
- Local assistance : 28%
- Assistance from associations : 19%
- Other : 13%
- None : 9%

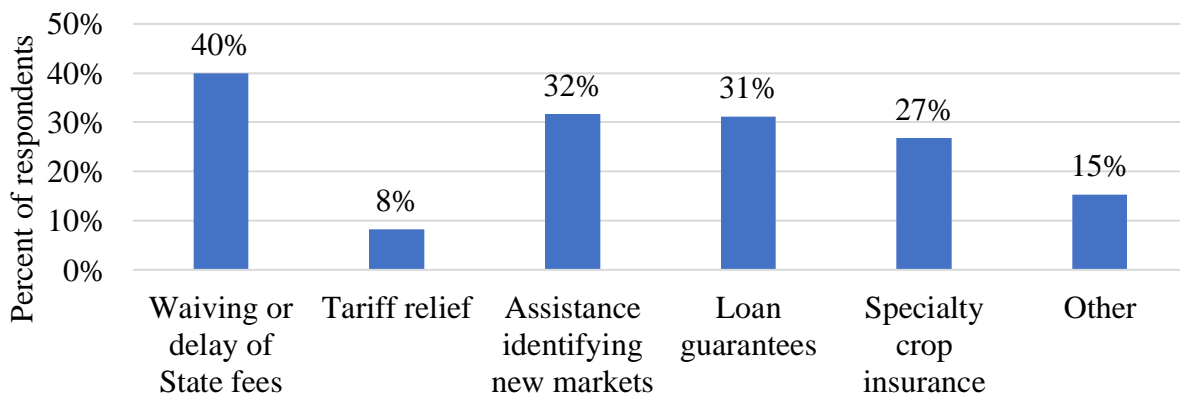


**Q17. Would assistance with any of the following be helpful to your farm or business right now? Please select all that apply.**

(n = 183)

- Waiving or delay of State fees : 40%
- Tariff relief : 8%
- Assistance identifying new markets : 32%
- Loan guarantees : 31%
- Specialty Crop Insurance <sup>b</sup> : 27%
- Other : 15%

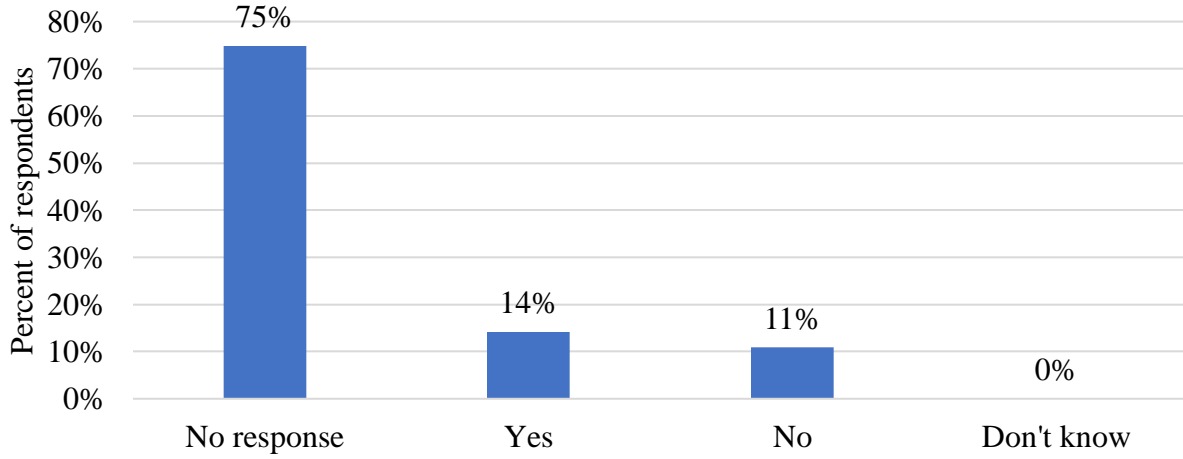
<sup>b</sup> Mollusk farms are currently not eligible for specialty crop insurance. Respondent comments indicated that changing this would be helpful to their farm or business.



**Q18. Are there any existing programs that your aquaculture, aquaponics, or allied business does not currently qualify for, that would increase the likelihood of survival of your farm or business?**

(n = 183)

- No response : 75%
- Yes : 14%
- No : 11%
- Don't know : 0%

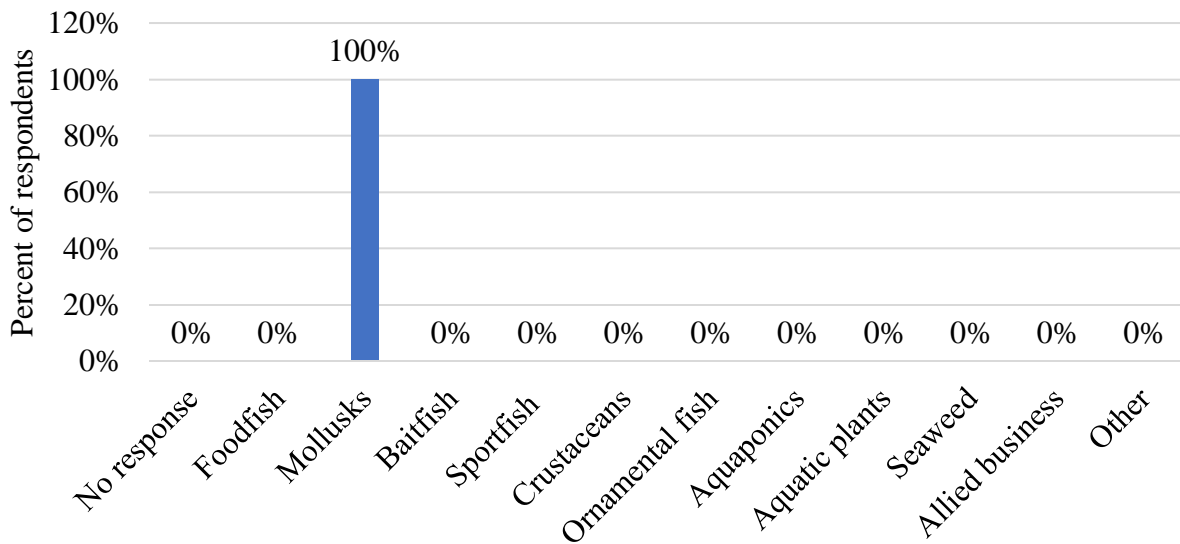




**Q19. What is the primary product that your farm or business produces?**

(n = 184)

• No response	:	0%
• Foodfish	:	0%
• Mollusks (oysters, clams, mussels, etc.)	:	100%
• Baitfish	:	0%
• Sportfish / recreational fish, including trout	:	0%
• Crustaceans (crawfish, soft crab, shrimp, etc.)	:	0%
• Ornamental fish (aquarium or water garden)	:	0%
• Aquaponics	:	0%
• Aquatic plants	:	0%
• Seaweed	:	0%
• Allied business (equipment, chemicals, etc.)	:	0%
• Other	:	0%



**Q19.1. Please indicate which is the major species of foodfish raised by your farm or business:**

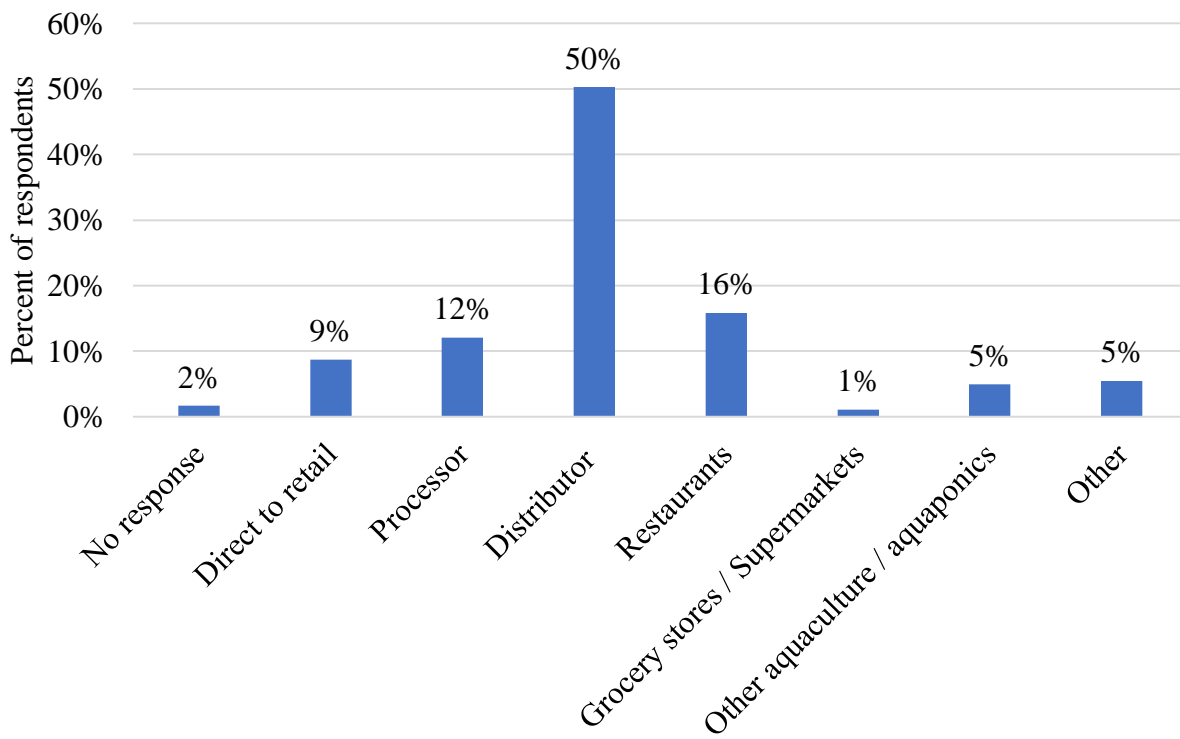
(n = 0)

• No response	:	NA
• Catfish	:	NA
• Trout	:	NA
• Salmon	:	NA
• Tilapia	:	NA
• Hybrid Striped Bass	:	NA
• Other	:	NA

**Q20. How does your farm or business primarily market or sell aquaculture / aquaponics products?**

(n = 183)

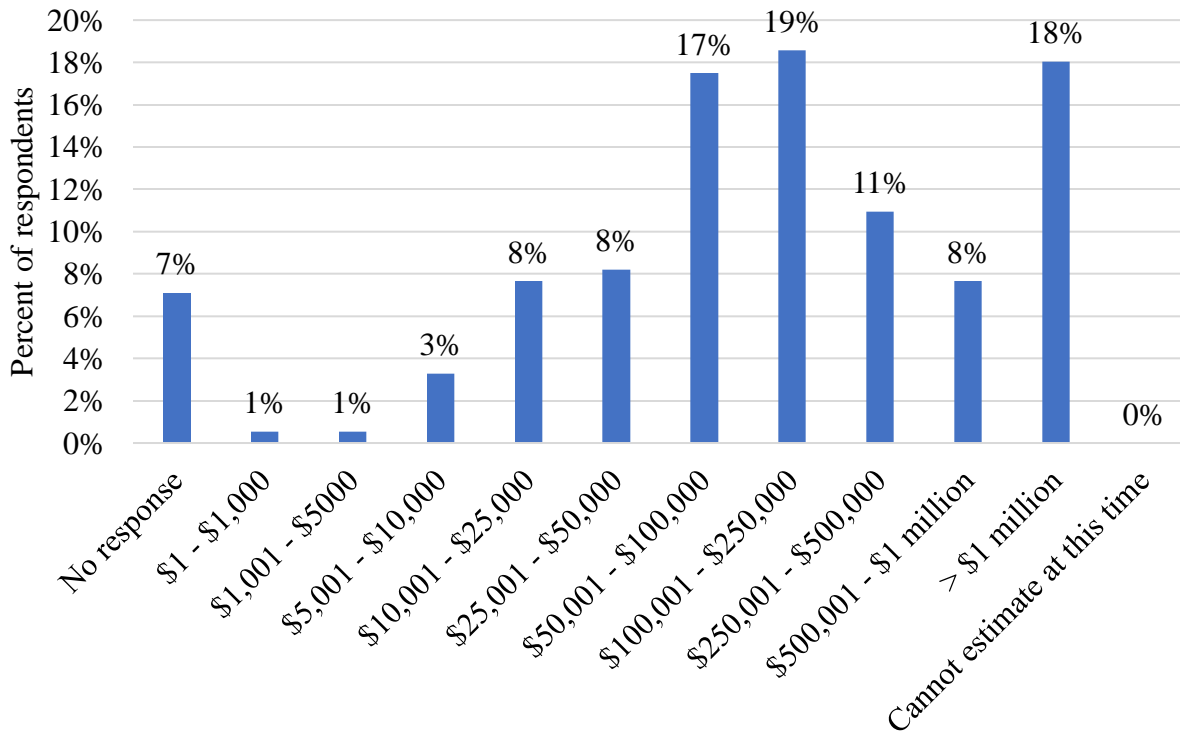
- No response : 2%
- Direct to retail (direct to consumers) : 9%
- Processor : 12%
- Distributor : 50%
- Restaurants : 16%
- Grocery Stores / Supermarkets : 1%
- Other aquaculture/aquaponics farms or businesses : 5%
- Other : 5%



**Q21. Please indicate the scale of your farm or business by annual sales volume before the effects of coronavirus disease (COVID-19):**

(n = 183)

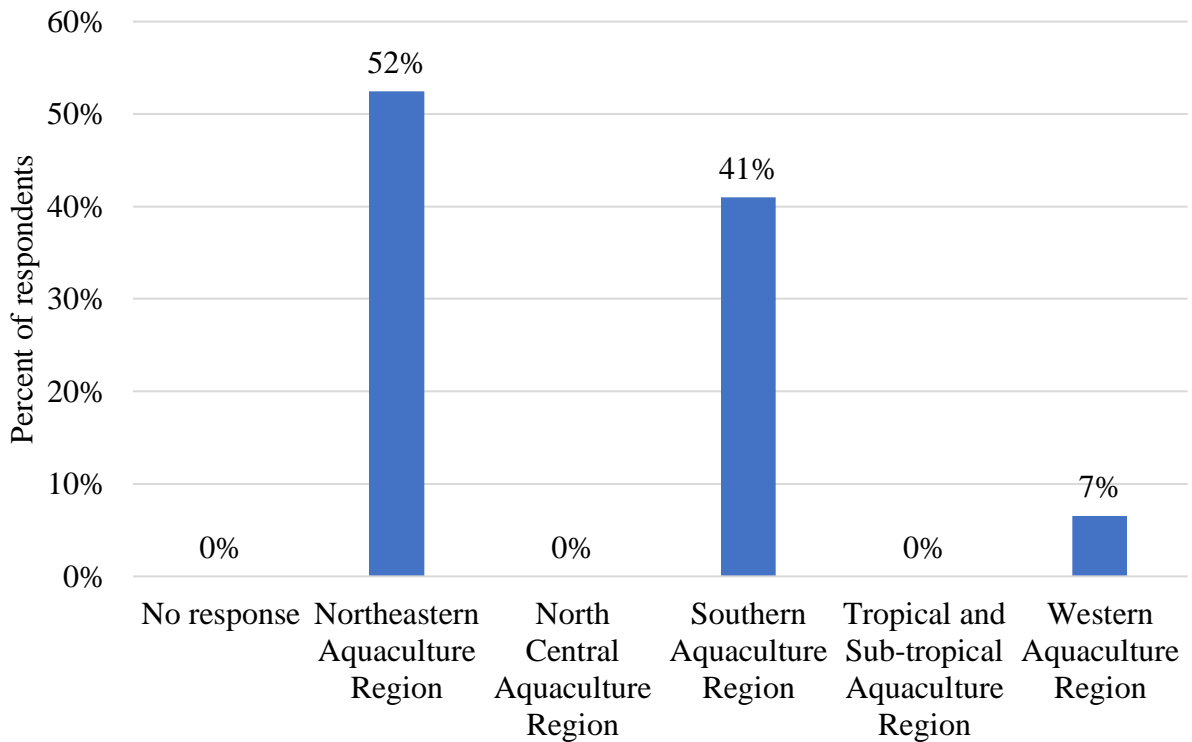
- No response : 7%
- \$1 - \$1,000 : 1%
- \$1,001 - \$5,000 : 1%
- \$5,001 - \$10,000 : 3%
- \$10,001 - \$25,000 : 8%
- \$25,001 - \$50,000 : 8%
- \$50,001 - \$100,000 : 17%
- \$100,001 - \$250,000 : 19%
- \$250,001 - \$500,000 : 11%
- \$500,001 - \$ 1million : 8%
- Greater than \$1 million : 18%
- Cannot estimate at this time : 0%



**Q22. In which USDA defined Aquaculture Region is your farm or business located?**

(n = 183)

- No response : 0%
- Northeastern Aquaculture Region : 52%
- North Central Aquaculture Region : 0%
- Southern Aquaculture Region : 41%
- Tropical and Sub-Tropical Aquaculture Region : 0%
- Western Aquaculture Region : 7%



# References

USDA (United States Department of Agriculture). 2019. 2018 Census of Aquaculture. National Agricultural Statistics Service, USDA, Washington, District of Columbia, USA.

Accessed April 2020 at:

[https://www.nass.usda.gov/Surveys/Guide\\_to\\_NASS\\_Surveys/Census\\_of\\_Aquaculture/index.php](https://www.nass.usda.gov/Surveys/Guide_to_NASS_Surveys/Census_of_Aquaculture/index.php).

# Acknowledgements

Thank you to all respondents who participated in this study. Also, thank you to all of the national, regional, and state associations, agencies, Extension, and all others who helped us disseminate the survey. There are simply too many names to list, thanks to all of you.