

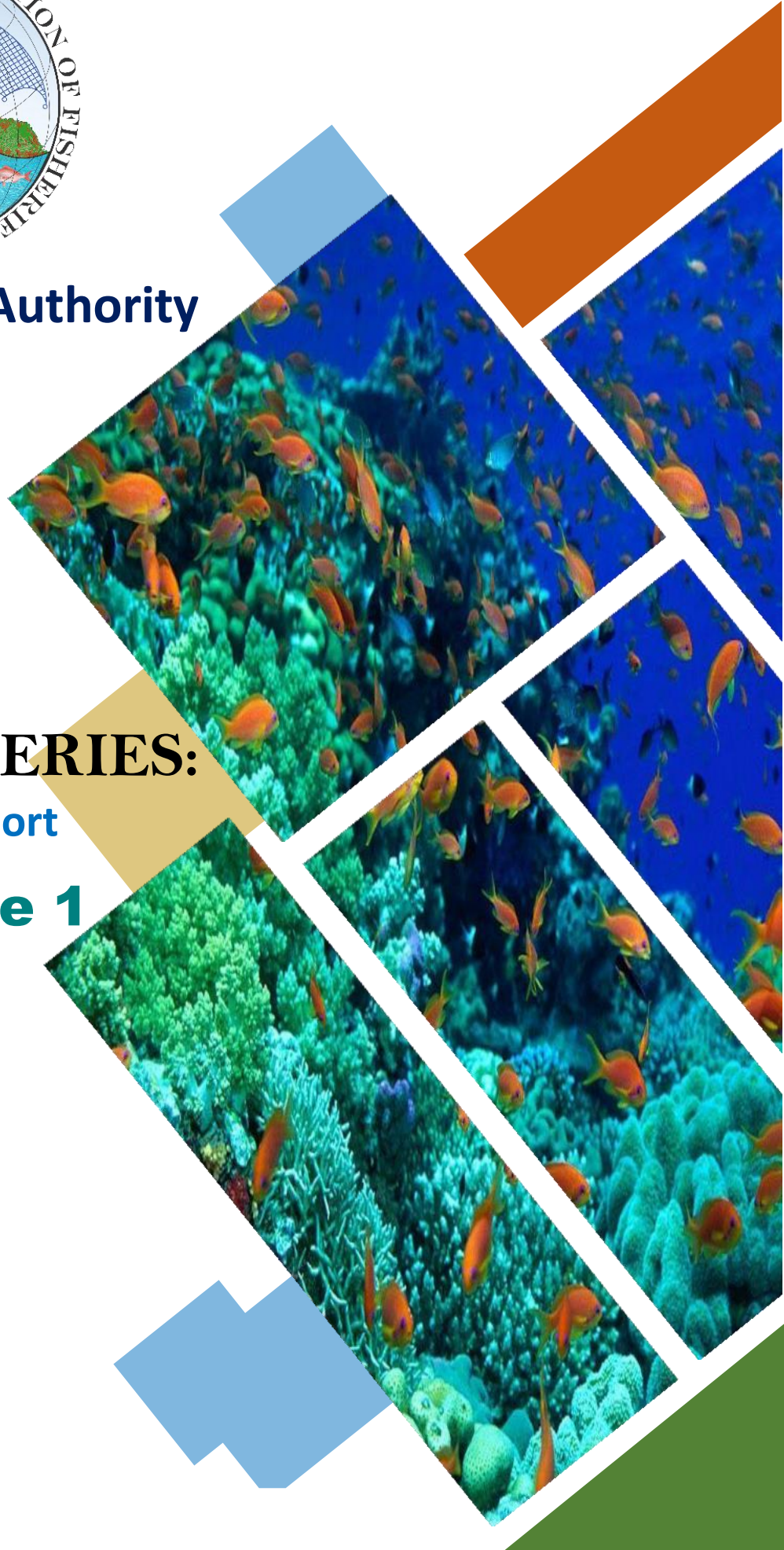
**National Fisheries Authority**

# **JAMAICA FISHERIES:**

**Quarterly Statistics Report**

## **Volume 3: Issue 1**

**APRIL – JUNE 2024**





# National Fisheries Authority

## Welcome

Dear Stakeholders,

We are pleased to present Volume 3 (Issue 1) Quarterly Statistics Report for the fisheries sector. This report provides valuable insights and data on the Jamaica Fisheries Sector.

As we continue to navigate the evolving challenges and opportunities in the fisheries sector, these statistics offer a comprehensive overview that supports informed decision-making and strategic planning. Whether it is tracking production volumes, export figures, or assessing the sustainability of our fisheries, this report aims to keep you well-informed.

Thank you for reading and your continued support. Together, we can ensure the long-term growth and sustainability of our fisheries.



**Dr. Zahra Oliphant**  
Principal Director  
Compliance, Licensing &  
Statistics Division



### VISION:

*The NFA is a model of excellence in capture fisheries and aquaculture management and development.*

### MISSION:

*To facilitate the sustainable development of the Jamaican fisheries sector, including aquaculture, through effective and efficient management, regulation, administration, and participatory governance for the benefit of all Jamaicans.*

### CORE VALUES:

*Integrity*

*Accountability*

*Transparency*

*Professionalism*

*Fairness*

*Respect*

*Goal Oriented*

*Teamwork*



## Introduction

The mission of the National Fisheries Authority (NFA) is “to facilitate the sustainable development of the Jamaica Fisheries sector, including aquaculture, through effective and efficient management, regulation, administration, and participatory governance for the benefit of all Jamaicans”. The fisheries sector is an important foreign exchange earner and a primary contributor to income, employment, food security and social and economic stability, especially in coastal communities. The NFA Statistics and Data Management Unit is required to collect, manage and appropriately use scientific data and information to inform the planning and decision-making process and fulfil the NFA’s international reporting requirements.

Thus, one of the main activities of the NFA focuses on enhancing fisheries data collection throughout the island. Activities that have been undertaken to improve data collection systems and capabilities include improved training, expansion of the data collection team, provision of handheld electronic devices, and development of a fisheries database. It is in this context that the Quarterly Statistics Report has been compiled to provide an information source for the sector and other stakeholders to access the most up-to-date fisheries statistical information that is available from the NFA. It is hoped that the publication will provide our stakeholders with a national picture of the Licenced fishing fleet, fish production, number of Licenced fishers, and socio-economic status of the sector and the economic importance of the fishery sector to Jamaica’s economy.





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Photo: Members of the NFA's Statistics and Data Management Unit engaged in a recent training exercise.



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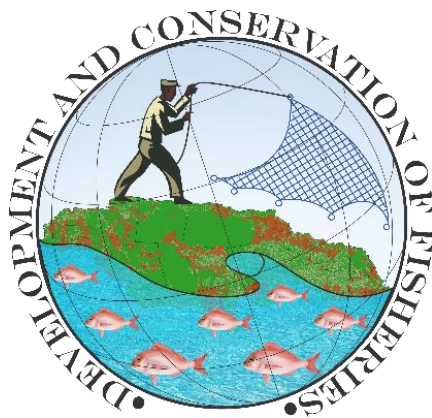
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Photo: Group picture of the Data Collection team.





# AGENCY OVERVIEW



# Agency Overview

## Our Core Business

We are a public sector agency responsible for the national regulatory & policy framework of/for fishing, conservation, management, and development of fisheries resources in Jamaica's fisheries waters & corresponding services delivery for sustainable fisheries management through the following functions.

Portfolio leadership and policy advice;

- Formulate, review, administer, and enforce the Fisheries Act, 2018;
- Formulate, align, review, Implement, monitor, and evaluate policies, strategies, plans, programs, and projects.
- Deliver extension advisory services through effective training, communication, awareness, and support to the fisheries stakeholders;
- Undertake applied research for sustainable fisheries resource management practices, commodity development, and marine resource conservation;
- Promote fisheries commodity development, utilization, and value-adding for food security and income generation;
- Strengthen global, regional, and national collaborative public and private sector, community, and industry partnerships on sustainable fisheries management and development and marine biodiversity and marine resource conservation;
- Maintain and comply with international bilateral and multilateral commitments.



### STRATEGIC PRIORITIES

### STRATEGIC OBJECTIVES

Sustainable Fisheries and Aquaculture Management and Development in accordance with local and international obligations and best practices.

- To increase the area of sanctuary cover of our coastal fisheries waters to 20,000 hectares by 2027.
- To increase percentage of fishers and fish farmers who are licensed, to 90% by 2027.
- To establish 6 additional management plans for capture fisheries and aquaculture by 2028.
- To develop underutilised fisheries and diversify aquaculture production by 2028.

Food and Nutritional Security

- To triple fish production from Aquaculture to over 3500t by 2027.

Good Corporate and Fisheries Governance

- To obtain ISO:9001 certification to strengthen the Authority's development into a world class organisation by 2026.
- For the NFA to be equipped with the requisite resources and infrastructure to function effectively as a statutory body by 2028.
- To strengthen the legislative framework by providing policy guidance for four key regulations to govern the fisheries and aquaculture sector by 2028.

Climate Smart and Resilient Fisheries

- To introduce climate smart technologies and alternative livelihoods in fisheries by implementing 2 pilot programmes by 2027.

Economic and Social Viability of the Fisheries Sector

- To increase the fisheries contribution to the GDP to J\$35B, by 2027.
- To increase the percentage of fishers and fish farmers who are trained in fisheries and aquaculture management and production technologies by 100%, by 2028.



# National Fisheries Authority Organizational Chart

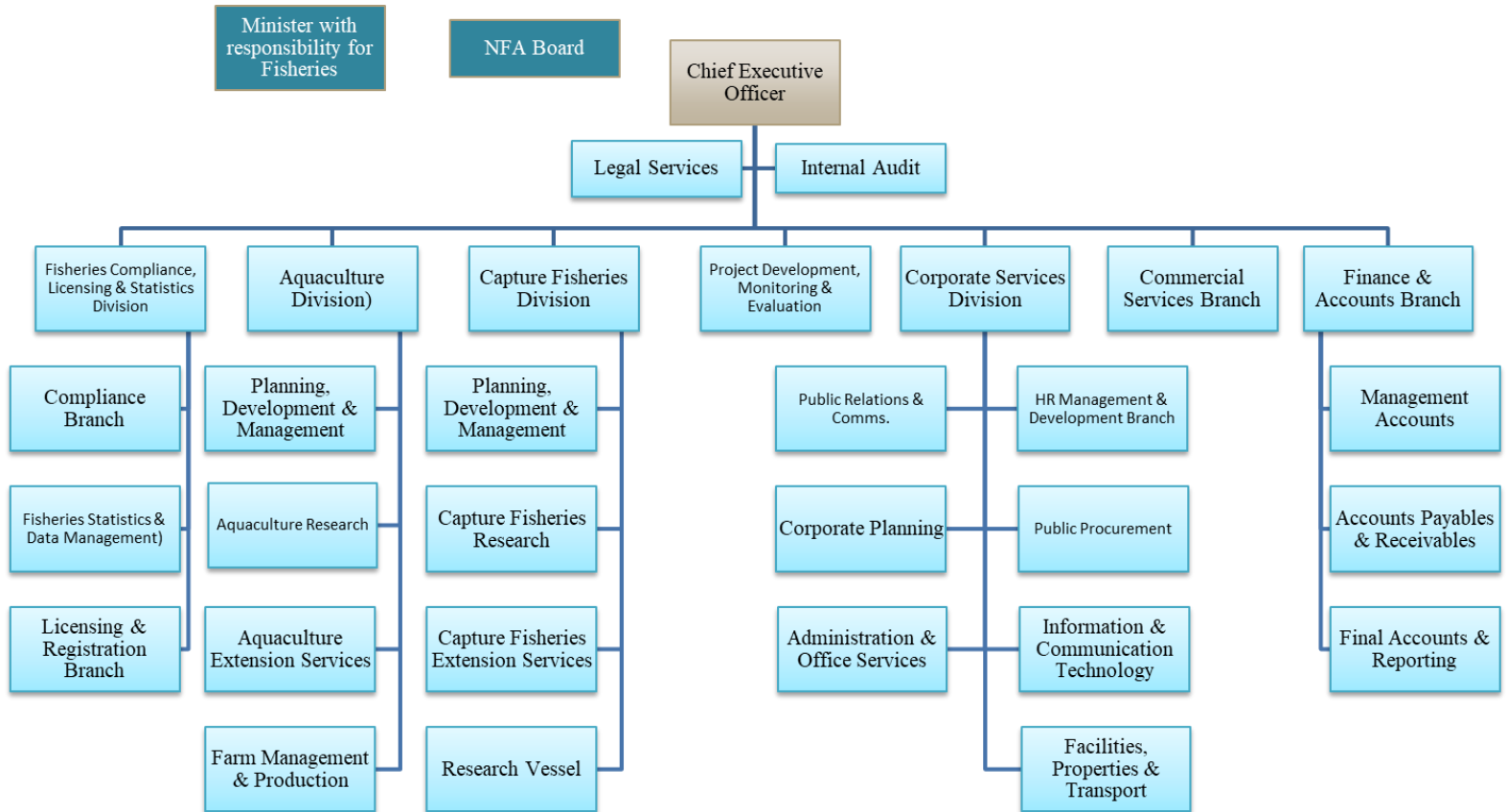


Photo: (L-R) NFA's CEO Dr Gavin Bellamy and Food for the Poor engage local Fishers in the Portland Cottage Fishing Community.



# Big Splashes in Q1 2024/25

Contributions and  
Achievements



**7 Quarterly Statistics**  
Report published since  
2022 but 1 for Q1



**6,000+**  
people who follow  
NFA on social media



**41%**  
Licence Renewal  
Rate



**42%**  
Increase in Compliance  
inspection



**1771**  
Fisher License  
issued in Q1



**4,800+ MT**  
Marine fish  
production since  
Jan. 2024



**41%**  
Increase in new  
Licence applications for  
the 17-35 age group



**517 MT**  
Aquaculture fish  
production since  
Jan. 2024



**\$1M+**  
In fines for  
2024



**503**  
Vessel  
Licence issued



**USD 68M**  
In earnings for  
marine production  
since Jan. 2024



**8**  
Outdoor  
Licensing  
sessions in Q1



**599 acres**  
In aquaculture  
production for  
Q1 2024/25.



**58%**  
Increase in licence  
renewal applications  
for the 17-35 age group







# REGULATORY PERFORMANCE OVERVIEW



## Overview of the Fisheries Sector in Jamaica

Jamaica covers about 10,992 square kilometers of the Caribbean Sea. The fisheries sector comprises two key sub-sectors: Capture Fisheries; including commercial and artisanal fishers, and Aquaculture.

### The Major Categories of Fishing

The offshore fisheries mainly involve the use of longline gear targeting tuna (mainly bluefin, yellowfin, and mahi), but a wide variety of species are caught for both local and overseas consumption. The amount of catch in offshore fisheries is determined by several factors, including the number of active vessels, oceanographic conditions, and the movement of fish.

Jamaica's coastal fisheries involve fishing in cays, reefs, deep slopes, and nearby open ocean waters. Most boats involved in these fisheries use many types of gear (for example, lines, nets, and traps) to harvest a very diverse range of finfish are less than nine meters in length.

The coastal artisanal fisheries of Jamaica are focused on supplying the demands for local consumption. The Fishers often sell their catch to the fish vendors. Artisanal fishery landings occur at fishing villages along Jamaica's coastline, roughly in proportion to the distribution of the population. Most of the landings are for the domestic markets, but some high-value species, such as conch and lobsters, are exported.

Jamaica's aquaculture sector is relatively small compared to the capture fishery sector. Harvests of wild-caught or farmed freshwater finfish in Jamaica consist mainly of freshwater tilapia.



Photo: Aerial picture of Pagee Fishing Beach in St. Mary



## Fishing Vessels

Fishing vessels in Jamaica are a cornerstone of the fishing industry, impacting economic stability, cultural identity, and food security. Balancing traditional practices with modern sustainable fishing techniques is essential for the future viability of Jamaica's fisheries sector. Continued investment in infrastructure, training, and sustainable practices will help enhance the overall effectiveness and sustainability of the fishing vessel fleet in Jamaica.

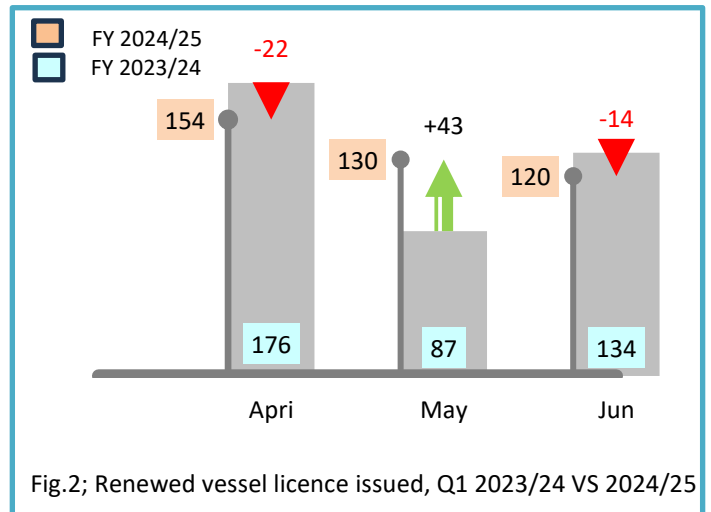
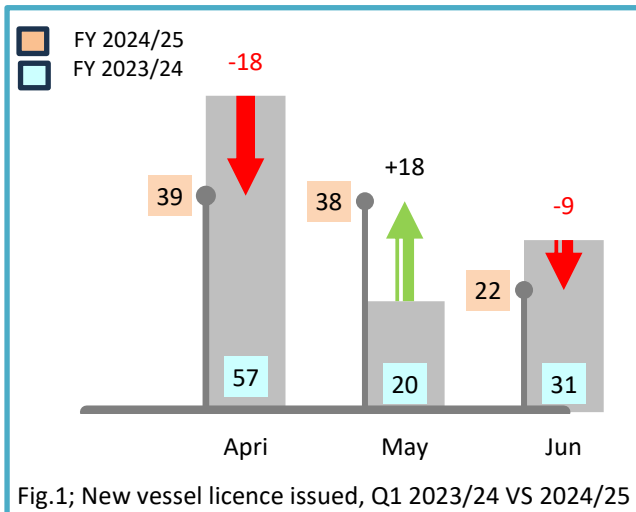


Figure 1 highlights new vessel Licences issued for Q1 2024/25, there was a decrease of 18 Licences issued in April 2024/25 compared to April 2023/24, 57 to 39. There was an increase of 18 Licences issued in May 2024/25 compared to 2023/24, 20 to 38. June 2024/25 when compared to June 2023/24 recorded a decrease of 9 Licences issued; from 31 to 22. There's an overall decrease in new Licences issued from 2023/24 to 2024/25.

Figure 2 highlights renewed Vessel Licences issued in Q1 2024/25 compared to the same quarter last year. April recorded a decrease of 22 Licences issued when compared to April 2023/24, from 176 to 154. 43 more Licences were issued in May 2024/25 when compared to last year (87 to 130), and June recorded a decrease of 14 Licences issued over the previous year from 134 to 120. Similar to fig.1, there's an overall decrease in renewed Licences issued from 2023/24 to 2024/25. The increase in May is noticeable. Both graphs indicate a decline in the number of fishing vessels renewing their Licences in the first quarter of 2024/25.



Photo: L-R: Asheika Howell and Latoya Brown carrying out verification checks within the Agency's records room.



	APRIL	MAY	JUNE	TOTAL
ARTISANAL	169	192	129	<b>490</b>
INDUSTRIAL	0	2	1	<b>3</b>
RECREATIONAL	0	3	3	<b>6</b>
CAY	11	11	0	<b>22</b>
SPORTS CHARTER	1	5	3	<b>9</b>
TEMP VESSEL CERTIFICATE	0	0	0	<b>0</b>
CONCH	4	3	0	<b>7</b>
<b>TOTAL</b>	<b>185</b>	<b>216</b>	<b>136</b>	<b>537</b>

Table 1: NUMBER OF BOAT LICENCES ISSUED BY CATEGORY, APRIL TO JUNE 2024.

The "Artisanal" category accounts for the vast majority of Licences issued each month, with a total of 490 (91%) Licences issued across the three months. This indicates that artisanal fishing is a dominant sub-sector in the Jamaican fishing industry. The other categories, including "Industrial," "Recreational," "Cay," "Sports Charter," "Temp Vessel Certificate," and "Conch," have significantly fewer Licences issued compared to the "Artisanal" category. This suggests that these sub-sectors are smaller in scale which leads to lower numbers. There are noticeable differences in the number of Licences issued across the three months. April generally has the highest number, followed by May, and then June. This could be influenced by factors like seasonal fishing patterns, and market demands. The total number of Licences issued in May (216) is higher than in April (185), however, the total number decreases further to 136 in June.

The high number of artisanal Licences suggests that this sector is critical to the livelihood of many Jamaicans, contributing significantly to local economies and food security. The lower numbers in categories like "Industrial" and "Recreational" indicate positive growth opportunities for commercial fishing. The variations in Licence numbers across the three months highlight the importance of considering seasonal factors and their potential impact on fishing activities. Figure 3 highlights that January 2024 to February 2024 recorded a 3% increase in vessel licence issued.

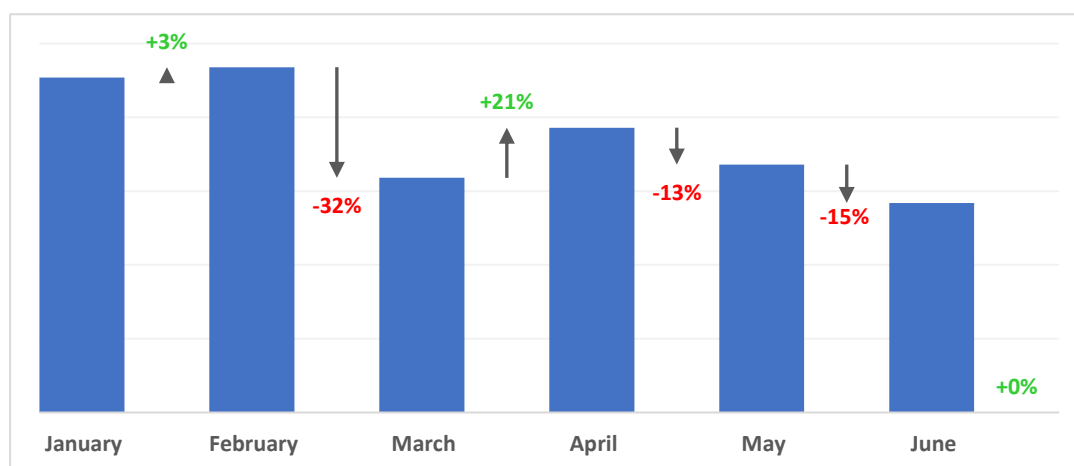


Fig.3; Vessel license issued MoM in 2024.



## Fisher's Licence

Individual Fishing Licences are a key tool for managing the fishing industry. They help regulate fishing activities, ensure sustainable fishing practices, and protect marine resources. Licence fees contribute to government revenue, which can be used to support fisheries research, management, and conservation efforts.

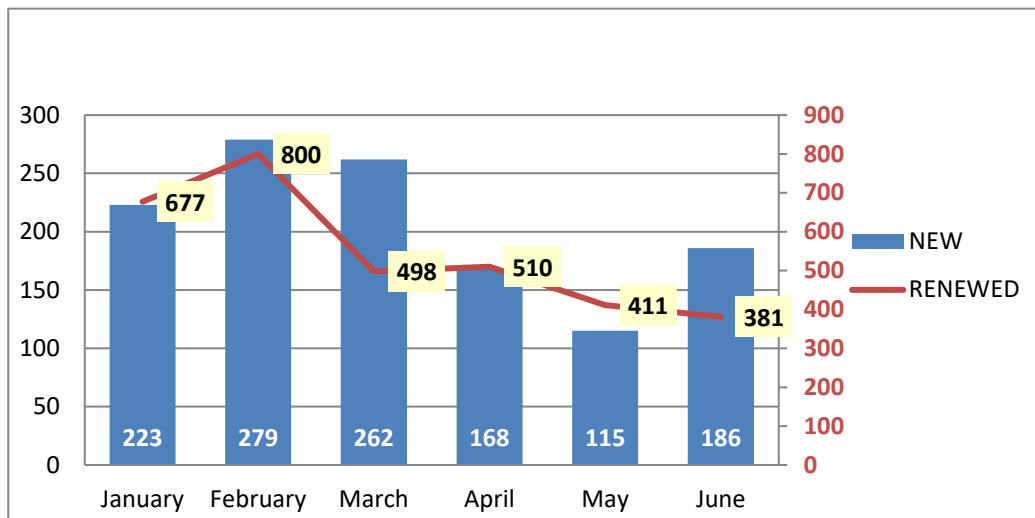


Fig.4; The graph represents the number of Fisher licence issued from Jan. – June 2024.

A total of 1,771 licences were issued to individual fishers in Q1 2024/25. The red line representing renewed Licences is consistently higher than the blue bars representing new Licences across all months. The number of renewed Licences remains stable from January to June. This supports the increased sensitization and in-field registration activities of the Agency's Licensing and Registration Unit. The number of new Licences issued sees a gradual decline from January to June. This may result from potential economic factors impacting the entry of new fishers into the industry. Increased competition for existing fishing grounds or resources. While the overall trend for new Licences is a decline, February sees a peak in new Licences issued.

YEAR	% renewing license from the previous year
2017	
2018	19%
2019	26%
2020	24%
2021	25%
2022	20%
2023	38%
**2024	41%
<b>Average: 28%</b>	

\*\*Jan-June

Table 2: FISHER & VESSEL LICENCES RENEWAL % ISSUED FROM 2018-2024. (EXCLUDING TEMPORARY PERMITS).

Table 2 shows the percentage of fishing Licences renewed in Jamaica from the previous year. The renewal rates fluctuate over the years, ranging from 19% in 2018 to 41% in 2024. This suggests a dynamic fishing sector, with varying activity levels and factors influencing renewal decisions. Despite the fluctuations, there is a general upward trend in renewal rates from 2017 to 2024, indicating a potentially stabilizing fishing industry. The renewal rate jumped to 38% in 2023, showing an increase compared to the previous years. This was driven by increased enforcement, increased awareness sessions and in-field licensing sessions. The highest renewal rate observed was for the first six months of 2024, at 41%.



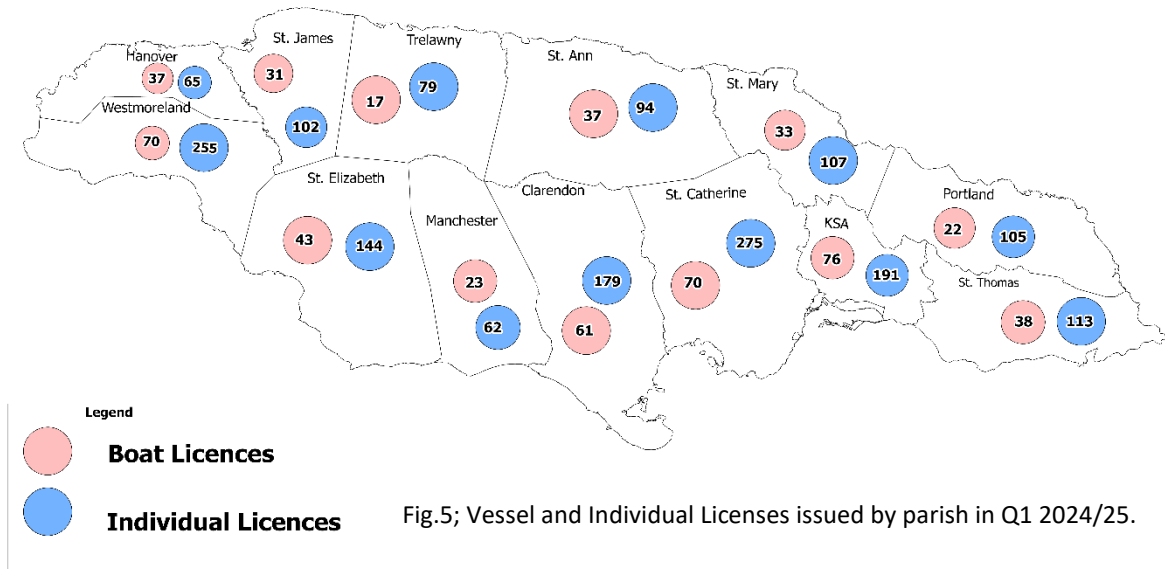


Fig.5; Vessel and Individual Licences issued by parish in Q1 2024/25.

## Compliance

Jamaica's fishing sector faces significant challenges in achieving full compliance with regulations. While efforts are being made to improve compliance, various factors contribute to ongoing issues. Operating without Licences, using prohibited gear, and exceeding catch limits are common instances of illegal fishing. These practices undermine sustainable management and create unfair competition. Many fishers underreport their catches, making it difficult to accurately assess fish stocks and enforce quotas effectively. The National Fisheries Authority (NFA) faces resource constraints and logistical challenges in fully enforcing regulations, particularly in remote areas. The National Fisheries Authority has implemented various regulations and enforcement strategies, including:

- Close seasons for certain species.
- Quotas for catch limits.
- Increased patrol efforts and enforcement by the NFA Compliance Unit.
- Penalties for violations.

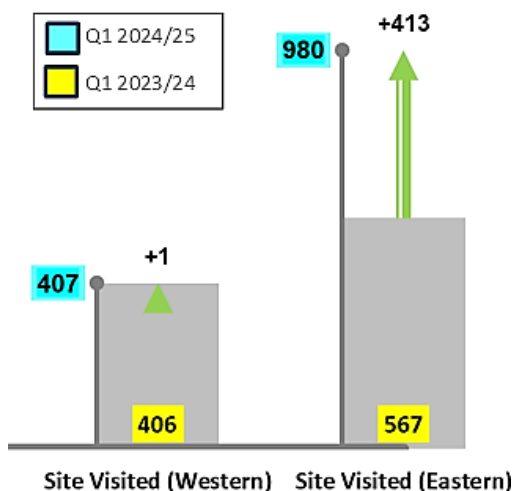


Fig.6; Site visits conducted by the Compliance Unit by region, Q1 2023/24 vs 2024/25.



Photo: L-R – NFA's CEO Dr. Gavin Bellamy engage Minister of Agriculture, Fisheries & Mining Hon. Floyd Green at a recent Blue Justice Initiative.  
Source: @JIS



The graph (Figure 6) compares the number of site visits conducted by the Compliance Unit in Jamaica during the first quarter of 2023/24 and 2024/25, separated by region (Western and Eastern). Overall, there was a 42% increase in site visits carried out by the compliance team, 973 in Q1 2023/24 compared to 1,387 in Q1 2024/25. When combining both regions, there were 414 more site visits executed in Q1 2024/25 compared to Q1 2023/24. This suggests an overall increase in compliance activity by the Compliance Unit.



The significantly higher increase in site visits was said to be driven by a focus on the below-listed activities for the compliance team. These were:

- Higher rates of non-compliance or suspected violations.
- Specific initiatives targeting compliance.
- Increased sensitization sessions.

The overall increase in site visits demonstrates the Compliance Unit's commitment to ensuring that the Fisheries Act regulations are adhered to within the fishing sector.

2019	2020	2021	2022	2023	**2024	TOTAL
\$2,642,000	\$180,000	\$1,145,000	\$9,156,000	\$4,806,700	\$1,020,000	\$18,949,700

\*\* Jan - June

Table 3: FINES FOR OFFENCES UNDER THE FISHERIES ACT – 2018, FROM 2019 TO 2024.

Table 3 displays the number of fines collected in Jamaica's fishing industry from 2019 to 2024 (Jan-June). The highest number of fines was collected in 2022, totalling \$9,156,000. This suggests a period of heightened enforcement or perhaps a significant violation that led to a substantial fine. Fines dropped significantly in 2020 to \$180,000. This could indicate several factors: A possible decrease in enforcement efforts due to resource limitations or a shift in priorities and/or Fishers might have become more compliant due to the significant fines in the previous year. Fines show a downward trajectory trend with a high of JMD 9,156,000 in 2022 to a low of JMD 1,020,000.



The highest amount since 2019 was collected in the first half of 2023 - \$4,806,700. The data for 2024 shows a continued effort to collect fines (\$1,020,000) suggesting ongoing enforcement activity. Table 3 provides a glimpse into the enforcement efforts in Jamaica's fishing industry. It indicates a dynamic situation with fluctuating compliance levels. To create a more effective and sustainable fishing sector, further analysis is necessary to understand the reasons behind the fluctuations and develop comprehensive strategies for enforcement, education, and economic support, to which the NFA is actively pursuing. Q1 2024/25 recorded 4 charges totalling JMD 340,000.

## In-field regulatory activities



Photo: Members of the NFA's Compliance Unit undergoing water quality training in St. Catherine.



Photo: NFA's Compliance Unit discarding seized products confiscated from persons in breach of the Fisheries Act – 2018.



Photo: NFA team conducting enforcement at sea.





# PRODUCTION PERFORMANCE OVERVIEW



## Marine Production

The data collection system for the artisanal fisheries is predicated on landings at individual beaches, with the average number of days fished per month being 20 days. The fishing beaches are sampled per an annual sampling plan, and based on the data collected, production estimates are computed. The artisanal fish production is diverse and includes finfish species (such as snappers, parrotfish, jacks, grunts), lobster, and conch.

Data collection during the period under review recorded over 370 species of fish being caught, compared to 300 species over the previous quarter (Q4 2023/24). The Sardines (*Sardinella spp.*), Black Jacks (*Caranx lugubris*), and Herring (*Opisthonema oglinum*) continue to account for most of the catch. The popular food fish Snapper showed high species diversity with over eleven different species being identified, including Dog, Glasseye, Grey, Lane, Mutton, Red, Silk, Vermillion and Yellowtail.

PARISH	SNAPPER	PARROT	DOCTOR	DOLPHIN FISH	JACK	GRUNT	BARACUDA	TUNA	MACKEREL	GROUPE	WRENCHMAN	TARPON	BUTTER FISH	KING FISH	MARLIN
St. Ann	✓	✓	✓	X	✓	X	✓	X	X	X	✓	X	✓	X	✓
St. Mary	✓	✓	X	✓	✓	X	X	✓	✓	✓	X	X	X	X	✓
St. James	✓	✓	X	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Trelawny	✓	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	✓	X
Westmoreland	✓	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	✓	✓	✓
St. Elizabeth	✓	✓	✓	X	X	X	X	X	X	X	X	✓	✓	✓	X
Clarendon	✓	✓	X	✓	✓	✓	✓	X	✓	✓	✓	✓	✓	✓	X
Manchester	✓	✓	X	X	✓	✓	X	X	✓	✓	✓	✓	X	X	X
St. Catherine	✓	✓	✓	✓	✓	✓	✓	X	✓	X	X	✓	✓	X	X
Portland	✓	✓	X	✓	✓	X	X	✓	✓	✓	✓	X	✓	✓	✓
KSA	✓	✓	✓	X	✓	✓	✓	X	✓	✓	X	✓	✓	✓	X
Hanover	✓	✓	X	✓	X	✓	X	X	✓	✓	✓	X	✓	X	✓
St. Thomas	✓	✓	✓	X	✓	✓	X	X	✓	✓	X	✓	✓	X	X

Table 4: COMMON FISH VARIETY CAUGHT PER PARISH IN Q1 2024/25.

Table 4 shows the common fish varieties caught per parish in Jamaica during the first quarter of 2024/25, Snapper and Parrot Fish were the most common as they were caught in all Parishes. Most fish varieties are caught across various parishes, suggesting a diverse fishing landscape in Jamaica. Notably, Dolphin Fish and Grouper are only caught in a few parishes, indicating they are less abundant or targeted in certain areas. The presence or absence of certain species in specific parishes indicates potential differences in resource availability and ecological conditions.

2024	Marine Production Estimate			Value Summary			Value Summary USD		
Month	Weight (MT)	Qtrly Fig (MT)	Quarter	Estimated Value J\$	Qtrly Estimate J\$	Quarter	Estimated Value USD	Qtrly Estimate USD	Quarter
January	1,176.44		4th Quarter FY23/24	2,592,186,770.00		4th Quarter FY23/24	16,616,581.86		4th Quarter FY23/24
February	601.25			1,325,264,250.00			8,429,897.91		
March	1,018.97	2,796.66		2,245,960,310.00	6,163,411,330.00		14,456,490.15	39,502,969.92	
April	390.79		1st Quarter FY24/25	861,288,350.00		1st Quarter FY24/25	5,515,775.54		1st Quarter FY24/25
May	744.16			1,640,046,270.00			10,448,151.05		
June	893.29	2,028.24		1,969,489,280.00	4,470,823,900.00		12,587,813.37	28,551,739.96	
	<b>TOTAL</b>	4,824.90		<b>TOTAL</b>	10,634,235,230.00		<b>TOTAL</b>	68,054,709.87	

Table 5: ESTIMATED MARINE PRODUCTION (MT) AND VALUE (USD), JANUARY – JUNE 2024.



Table 5 shows an increase in both the weight of fish caught and the estimated value of those catches over the six months from January to June 2024. This suggests an increase in fishing activity or more successful catches, potentially driven by seasonal factors, higher demand for specific fish, or improved fishing methods. The weight of fish caught increased from 1,176.44 MT in January to 893.29 MT in June. The estimated value in Jamaican dollars increased in January and March, with January recording the highest value of JMD 2.5B. The value declined from April to June, reaching JMD 1.9B in June. This indicates a substantial rise in the value of the catches, potentially driven by higher prices for specific species or increased demand. For April – June 2024, marine finfish production was 2,028.24 MT (Table 5), which yields an approximate value of USD 28 Mil or JMD\$4.4 billion (Table 5).



Photo: NFA's Data Collection Unit receiving instructions from Mrs. Anginette Murray (R) Data & Statistician Manager.

Fishery	2024						Total (MT)	% Composition
	January	February	March	April	May	June		
Atrisanal finfish	1,147.19	595.81	1,013.62	348.24	666.50	745.88	<b>4,517.24</b>	93.62
Sea Cucumber	0	0	0	0	0	0	<b>0.00</b>	0.00
Industrial Conch				42.55	77.66	147.41	<b>267.62</b>	5.55
Industrial Spiny Lobster*	29.25	5.44	5.35				<b>40.04</b>	0.83
<b>Total Marine Production</b>	<b>1176.44</b>	<b>601.25</b>	<b>1018.97</b>	<b>390.79</b>	<b>744.16</b>	<b>893.29</b>	<b>4,824.90</b>	<b>100</b>

\* Reported weight for whole, tail and head meat

Close Season

Table 6: Marine fish production (MT) trend by fishery type, January to June 2024.

Table 6 presents marine production data for 2024 (up to June) for various marine fishery species, including artisanal finfish, sea cucumber, industrial conch, and industrial spiny lobster. The production of artisanal finfish varies significantly from month to month. January saw the highest production with **1,147.19 MT**, followed by March (**1,013.62 MT**). Production sharply dropped in April to **348.24 MT**, but it partially rebounded in May (**666.50 MT**) and June (**745.88 MT**). There's a noticeable dip in production during the second quarter (April and May) before it starts recovering.



The drop in production during this period was affected by many factors, which may include the close season initiated, environmental conditions, and resource availability. For the first six months, artisanal finfish production totals **4,517.24 MT**. No production of sea cucumber was reported for the first six months of 2024, industrial conch production shows a steady increase from **42.55 MT** in April to **147.41 MT** in June. The total marine production shows significant monthly variations, with a peak in January (**1,176.44 MT**) and lower points in April (**390.79 MT, estimated**). This variation corresponds closely to artisanal finfish trends, which form the bulk of the total marine production but, the value per MT for industrial fishery is significantly higher ( $p < 0.05$ ). The total production of marine resources over the first six months is **4,824.90 MT**. Artisanal finfish is by far the largest contributor to marine production, making up the bulk of the total catch, accounting for **93.62%** of total marine production. The Lobster Close Season runs from April to June and for the Conch fishery from August to February.

Fishery	2024						Total (USD)	% Contribution
	January	February	March	April	May	June		
Artisanal finfish	\$16,616,582	\$ 8,429,898	\$14,456,490	\$ 5,515,776	\$ 10,448,151	\$ 12,587,813	\$68,054,710	88.68
Industrial Conch				\$ 159,872	\$ 700,351	\$ 1,759,948	\$ 2,620,171	3.41
Industrial Spiny Lobster*	\$ 2,048,316	\$ 1,541,273	\$ 2,473,282				\$ 6,062,871	7.90
<b>Total Marine Production</b>	<b>\$18,664,898</b>	<b>\$ 9,971,171</b>	<b>\$16,929,772</b>	<b>\$ 5,675,647</b>	<b>\$ 11,148,502</b>	<b>\$ 14,347,761</b>	<b>\$76,737,751</b>	<b>100.00</b>

Table 7: Estimated value (USD) for marine fish production (MT) by fishery type, January – June 2024.

## Biological Data for Marine Species

### Lobster

YEAR	Lobster Tail Sampled	Whole Lobster Sampled	Male %	Female %	Female with tar (T)	Female with scratched tar (S)	Avg. Carapace Length (cm)	Avg. Tail Length (cm)	Avg. Telson Length (cm)	Avg. Body Depth Length (cm)	Avg. Whole Weight (g)	Avg. Tail Weight (g)
2021	362	646	43%	53%	3%	1%	13.7	11.4	5.08	6.37	665	439
2022	2611	2169	61%	33%	4%	2%	8.8	14.2	4.80	6.50	614	245
2023	2608	2059	53%	38%	2%	6%	7.2	11.5	3.5	4.9	602	238
**2024	475	384	31%	32%	14%	23%	5.3	10.4	3.31	3.86	651	239
<b>TOTAL</b>	<b>6056</b>	<b>5258</b>										

\*\* as at March 2024

Table 8: BIOLOGICAL SAMPLING RESULTS OF INDUSTRIAL LOBSTER LANDED FROM 2021 TO 2024.

The number of lobsters sampled varied across the years. The percentage of male lobsters was highest in 2022 (61%) and lowest in 2024 (31%). Conversely, female representation peaked in 2021 (53%), declining to 32% in 2024. Females with tar (T) and those with scratched tar (S) increase significantly in 2024. T-marked females represent 14% in 2024, compared to 4% in 2022, while scratched tar females jumped to 23% from 6% in 2023.



Photo: Caliper being used to measure the carapace of a lobster.





The average carapace length decreased over time from 13.7 cm in 2021 to 5.3 cm in 2024, the average tail and telson lengths also show a general decrease, with a noticeable drop between 2022 and 2024. Average body depth and whole weight saw a slight dip, but 2024’s whole weight (651g) is almost as high as in 2021 (665g). Tail weight declined sharply in 2022 (245g) and 2023 (238g). Lobsters appear to be getting smaller across all measured dimensions, which could indicate environmental, biological, or fishing pressure changes. In Issue 2 the monthly variations will be shared to support further biological analysis of this species.

Conch

YEAR	Samples	Male %	Female %	Avg Weight - 50% (g)	Avg Weight - dirty (g)
2021	818	37%	61%	223.89	0
2022	3361	41%	59%	128.08	142.60
2023	3759	42%	58%	136.50	175.16
2024	2816	14%	86%	130.99	135
TOTAL	10754				

Table 9: BIOLOGICAL SAMPLING RESULTS OF INDUSTRIAL CONCH LANDED FROM 2021 TO 2024.

In 2021, the gender ratio showed **37% males** and **61% females**. In the following years, the proportion of males gradually increased slightly, reaching **42% males** and **58% females** in 2023. However, so far, the proportion of males dropped sharply to **14% males** and **86% females**. This represents a shift in the sex distribution of the conch population sampled. From 2021 to 2023, the male-to-female ratio remained relatively stable with minor changes, but so far, there is a drastic reduction in the percentage of male conchs.

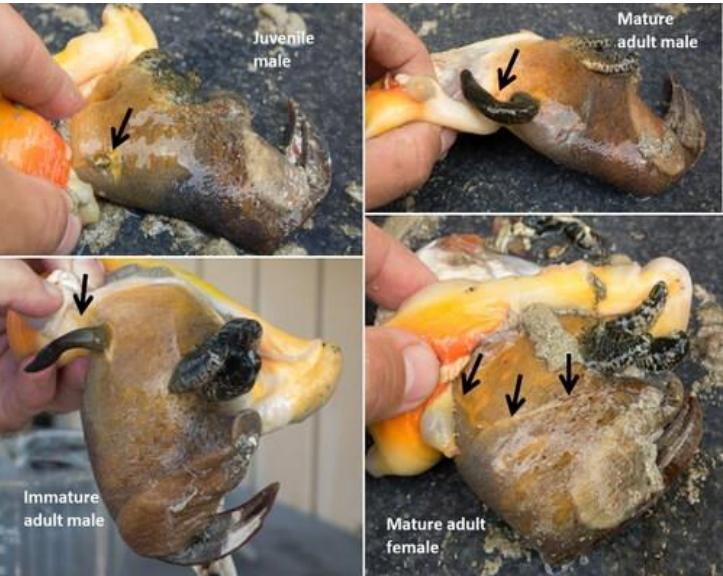


Photo: Descriptive maturity features for Queen Conch (*Aliger gigas*).





Two weight categories are provided: "**Avg Weight - 50%**" and "**Avg Weight - dirty**". Only the "Avg Weight - 50%" is recorded, with an average of **223.89 grams**. From 2022 onward, both weight categories are recorded. The average weight for the 50% category decreased to **128.08 grams**, while the dirty weight was **142.60 grams**. There is a small increase in both categories, with the 50% weight at **136.50 grams** and the dirty weight at **175.16 grams**. The average weight slightly decreases again, with the 50% weight at **130.99 grams** and the dirty weight at **135 grams**. From 2021 to 2022, the 50% weight dropped by 43% (from 223.89g to 128.08g). From 2022 to 2023, a minor increase of about 6% in the 50% weight, with a corresponding rise in dirty weight. In 2024, both weights decreased again, particularly the dirty weight, which dropped by 23% compared to 2023.

## Aquaculture Production

To date, in 2024, the Aquaculture sector comprises approximately 839.06 acres of ponds and tanks, with 599.61 acres currently in production. The total number of registered fish farms stands at 114, including hatchery and Production. Aquaculture Production is 352.54 MT for the period January to June.

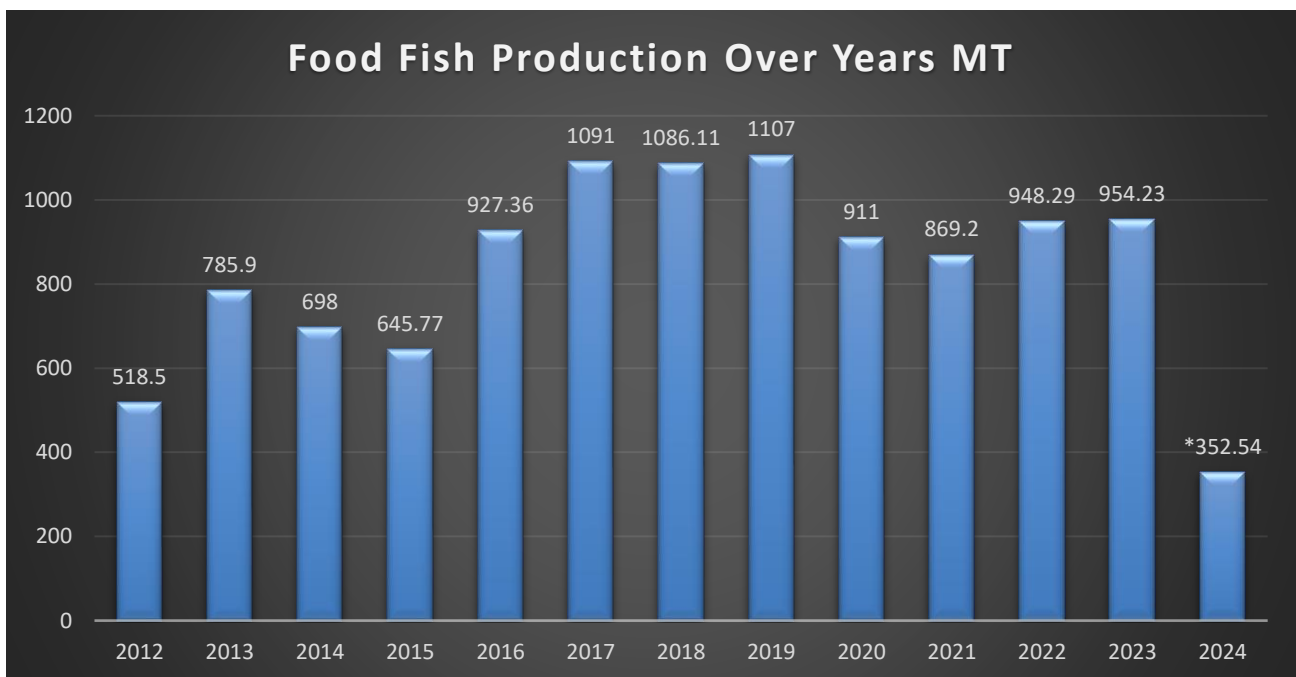


Fig.7; Aquaculture production in MT from 2012 to 2024.

\* January to June



Photo: Patrons look on in enthusiasm at the NFA's Aquaculture koi pond display.



Figure 7 shows trends in food fish production from 2012 to 2024. The values in metric tonnes (MT) allow us to identify key trends and statistical movements. The general trend shows fluctuations in fish production over the years, with periods of steady increase followed by declines, and eventual stabilization at a higher production level in the later years.

#### **Growth Phase (2012-2017):**

- **2012:** The production starts at **518.5 MT**.
- **2013:** A significant increase to **785.9 MT** (~52% growth).
- **2014-2015:** A slight dip to **698 MT** in 2014, followed by a further decrease to **645.77 MT** in 2015.
- **2016:** A robust recovery to **927.36 MT**, showing an increase of ~43% compared to 2015.
- **2017:** Another strong rise to **1,091 MT** (~18% growth from 2016).

#### **Plateau and Stabilization (2017-2019):**

- **2017 to 2019:** Production remains relatively stable around the 1,100 MT mark.
- **2017:** **1,091 MT**
- **2018:** **1,086.11 MT** (a slight decrease)
- **2019:** A small rise to **1,107 MT**.

This period reflects a stable production phase, indicating the aquaculture systems were functioning efficiently or more farmers entered the industry, likely reaching an optimal output.

#### **Decline Phase (2019-2021):**

- **2019 to 2021:** A noticeable decline begins after the 2019 peak.
- **2020:** Production drops to **911 MT**, showing a ~17.6% decrease from 2019.
- **2021:** A further decline to **869.2 MT** (~4.6% decrease from 2020).

The decline in production during this phase might be attributed to external factors such as environmental conditions, economic shifts, farmers exiting the industry or operational challenges within the aquaculture industry.

#### **Recovery and Growth (2021-2024):**

- **2022:** The production rebounds to **948.29 MT** (~9% growth from 2021).
- **2023:** A slight increase to **954.23 MT** (~0.6% growth).
- **2024:** Recorded a sharp drop to **352.54 MT** for the 1<sup>st</sup> 6 months, indicating a significant reduction in production, this was a result of a major farmer within the Aquaculture exiting the industry.

The overall trend shows initial growth and stabilization of food fish production, followed by periods of decline and modest recovery. However, the sharp drop for the 1<sup>st</sup> 6 months of 2024 was attributed to the exit of a major Aquaculture farmer and reduced acres in production.



2024	Total Acres	Current Production	Acres in Production %	Total Harvest
Jan - Mar	837.87	716.61	85%	179
April - June	839.06	599.61	71%	173.3

Table 10: AQUACULTURE TOTAL PRODUCTION ACREAGE AND HARVEST TOTAL FOR 2024.

Parishes	Acres
St Catherine	479.81
Clarendon	87.45
St Elizabeth	11
Westmoreland	3.35
Hanover	9
St Thomas	2.5
St Ann	2
Portland/ St Mary	4.5

Table 11: AQUACULTURE ACRES IN PRODUCTION BY PARISH FOR 2024.



Photo: NFA Principal Director Dr. Zahra Oliphant is all smiles after purchasing her tilapia.

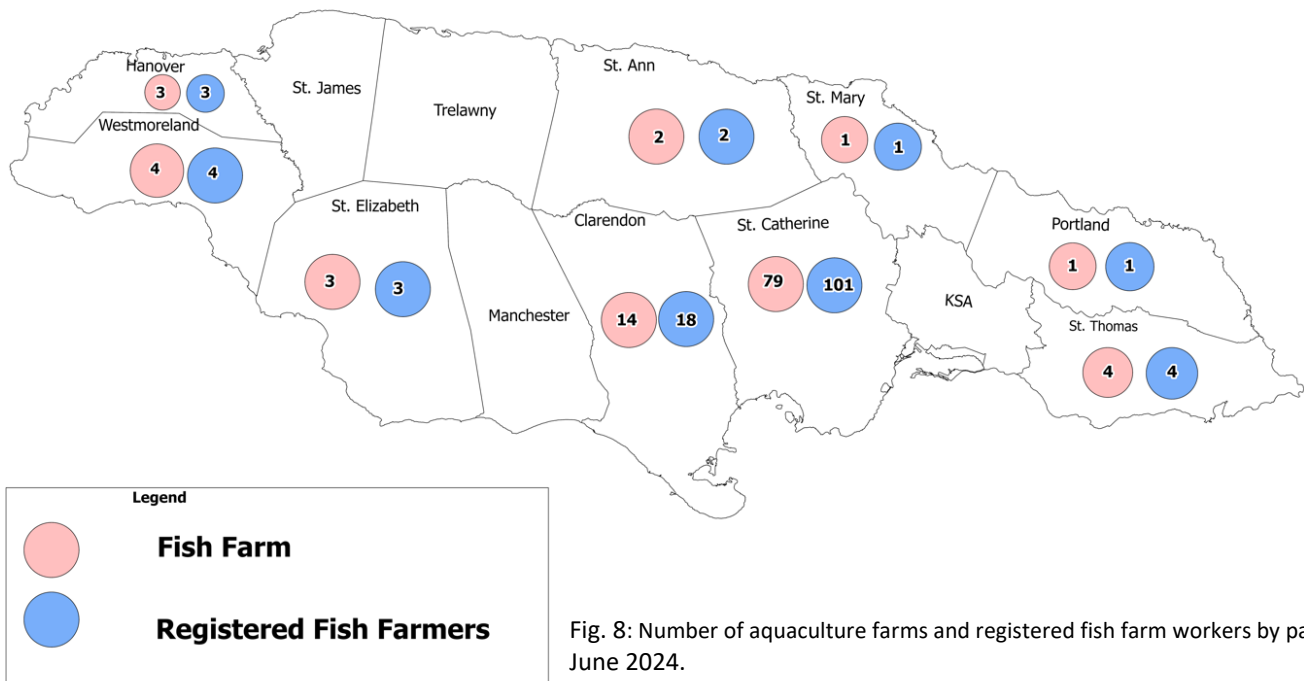


Fig. 8: Number of aquaculture farms and registered fish farm workers by parish, as of June 2024.





# ECONOMIC PERFORMANCE OVERVIEW



## Socio-Economic Status

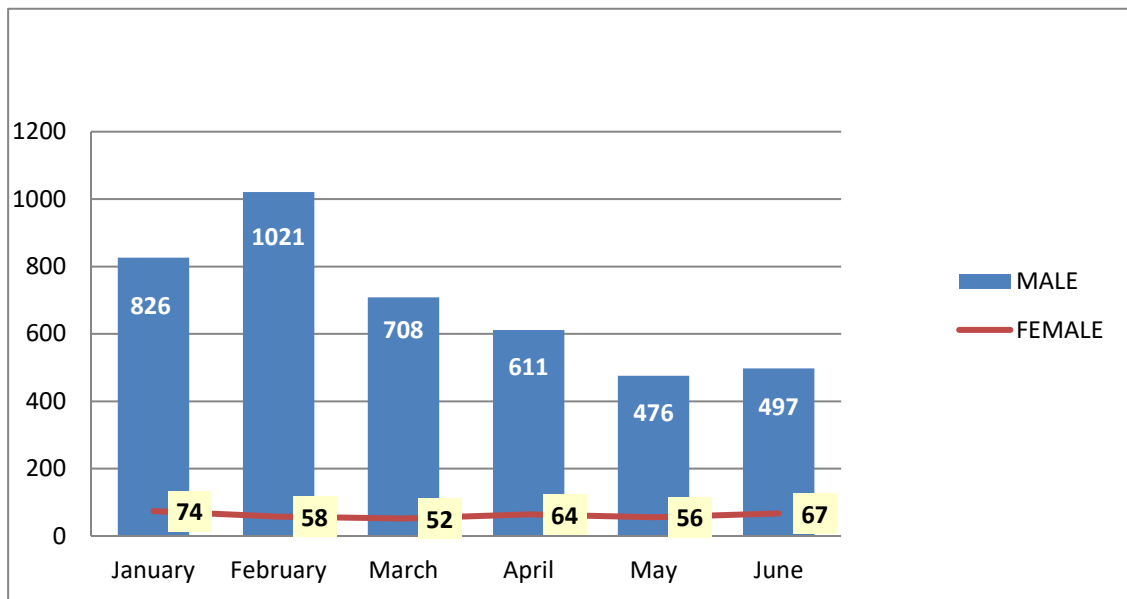


Fig. 9: GENDER OF FISHERS RECEIVING LICENCES IN 2024.

The graph shows the number of male and female fishers per month. Male fishers significantly outnumber female fishers in every month. This suggests a gender disparity in the fishing industry, potentially reflecting historical or cultural factors. The number of both male and female fishers generally fluctuates across the months. There's a peak in male fishers in February, followed by a decline throughout the year. January has a notably higher number of female fishers compared to other months. The average number of male fishers is 689, female fishers average around 61. The ratio of male to female fishers is roughly 14:1.

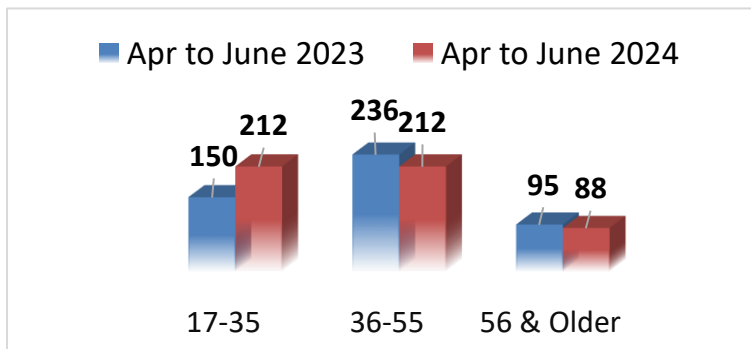


Fig. 10: AGE OF NEW FISHERS APPLICATION Q1 2023/24 vs Q1 2024/25.

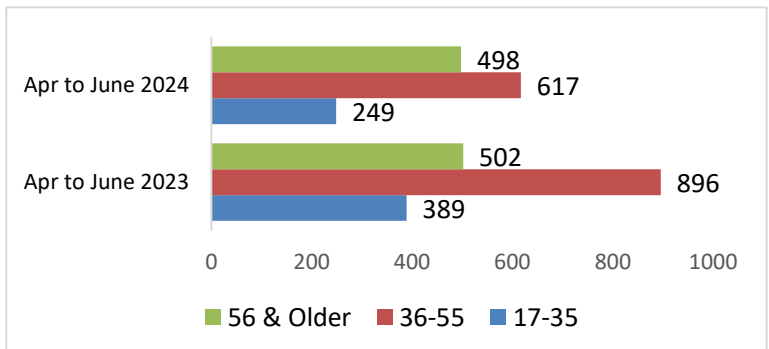


Fig. 11: AGE OF RENEWAL FISHERS APPLICATION Q1 2023/24 vs Q1 2024/25.



Figures 10 and 11 highlight the new and renewal fisher applications, the 17-35 age group increased from 150 to 212 for new applications YoY representing a 41.33% growth indicating a rising interest among younger people in entering the fishing industry. This is a notable shift as the younger generation typically opts for other professions. The surge suggests either an improvement in outreach, better economic incentives, or more favourable entry conditions for younger fishers. For the 36-55 age group, there was a decline of 10% from 236 to 212 applications YoY. This suggests a slight decrease in interest or capacity to enter the industry for this middle-aged group, even though this age group represents a substantial portion of applicants, additionally, this group seems less inclined to enter the industry compared to the younger age group. The 56 & older age group had a 7.3% decline from 95 to 88 applications YoY relatively small but highlights that fewer older individuals are applying for new fishing Licences. This could be due to several factors, including the physical demands of fishing, natural exit from the industry, and the potential for retirement or decreased participation among this age demographic.

For fishers within the 17-35 age group renewing their applications, there was a marked increase of 59% from 389 to 617 applications YoY. This suggests that younger fishers who are already in the industry are increasingly renewing their Licences which indicates a strong retention rate among younger fishers and potentially speaks to the sustainability of fishing as a long-term profession for them. For the 36-55 age group applications more than doubled from 249 to 502; representing a 101.61% growth YoY for this age group. Additionally, this also reflects a substantial commitment to continuing in the profession. This group could be comprised of experienced fishers who are in their peak working years, and the strong renewal rates reflect a continued reliance on this cohort to sustain the fishing industry.



Photo: NFA's CEO Dr Gavin Bellamy (L) and Regional Extension Officer Mr Simpson (R) present a local fisher from Alligator Pond a token of appreciation.

The number of persons renewing in the 56 & Older age group declined by 44% from 896 to 498 applications YoY, this reflects a notable reduction in the participation of older fishers renewing their Licences. The significant rise in both new applications and renewals from the 17-35 age group suggests that there is an influx of younger individuals entering and staying in the industry. The younger generation may also be more adaptable to changes in regulations or sustainability practices, which are becoming increasingly important in fishing. The strong growth in the 36-55 age group, particularly in renewals, suggests that this cohort remains the backbone of the industry. Their experience and stability provide continuity in the workforce. The doubling in renewals from this group shows that while fewer individuals may be entering the industry (as seen from the decrease in new applications), those already in the profession are staying longer, possibly due to stable income opportunities or improvements in work conditions.



The sharp decline in renewals from the 56 & older age group suggests that the industry may soon face a loss of its most experienced fishers. This demographic shift points towards aging out of a portion of the workforce, which could lead to challenges in knowledge transfer, unless younger fishers are properly trained and mentored. The influx of younger applicants and renewals indicates a positive rejuvenation of the workforce. This could lead to a more dynamic, tech-savvy, and innovative fishing industry in the coming years. However, ensuring that these younger workers are trained and able to gain the experience necessary to replace the older generation will be crucial to maintaining industry stability. With the decline of the older age group, there may be a future skill gap. This could affect sectors of the fishing industry that rely heavily on the expertise of veteran fishers, such as navigation, understanding of traditional fishing patterns, and handling complex or unpredictable sea conditions.

## Gross Domestic Product (GDP) Status

The fisheries sector has shown remarkable growth in recent years, particularly in 2022 and 2023, with a notable impact on both agriculture and overall GDP. The sector is poised for continued growth in 2024, although at a more moderate pace. Fisheries will likely remain a critical driver of agricultural growth, and its increasing contribution to GDP highlights its growing importance in the national economy. Sustainable management and market adaptation will be key to maintaining this positive trend in the coming years.

GDP Contribution Based on Basic Prices (excluding taxes and subsidies on products) - \$'Million						
Total GDP	2018	2019	2020	2021	2022	2023
	15,650.65	15,810.81	13,880.88	14,670.67	17,100.04	19,420.00
Agriculture, Forestry & Fishing	1,014.8	1,018.9	1,004.3	1,087.6	1,185.9	1,117.9
Fishing	94.58	111.02	109.04	90.16	114.33	209.68
% Contribution of fishing to Agriculture	9.32%	10.90%	10.86%	8.29%	9.64%	18.76%
% Contribution of fishing to total GDP	0.60%	0.70%	0.79%	0.61%	0.67%	1.08%

Table 12: GDP CONTRIBUTION (USD \$' MILLION) BY THE FISHERIES SECTOR TO AGRICULTURE AND JAMAICA'S GDP.

The fisheries sector showed moderate growth during the period 2018 to 2020, with its contribution fluctuating between \$94.58 million in 2018 and \$111.02 million in 2019, before slightly declining to \$109.04 million in 2020. From 2018 to 2019, there was a 17.43% increase. From 2019 to 2020, the fisheries sector experienced a slight 1.78% decline.



In 2021 there was a significant drop to \$90.16 million, reflecting an 18.96% decrease from 2020. This sharp decline is notable and may be influenced by Tropical Storm Grace impact on the island in 2021. There was a strong recovery in 2022, with a jump to \$114.33 million, a 26.81% increase over 2021. This rebound suggests improved market conditions, and/or better yields from fishing activities. A major surge occurred in 2023, with the fisheries sector growing to \$209.68 million, marking an 83.32% growth over the previous year. This is a significant development, reflecting either a considerable increase in fish production, favorable policy support from the Ministry, and a marked rise in demand for fish products domestically. The fisheries sector is expected to continue its upward trend, reaching \$225.44 million in 2024, representing a 7.5% growth from 2023. Although the growth rate is lower than in the previous year, the forecasted increase suggests sustained positive momentum for the sector.

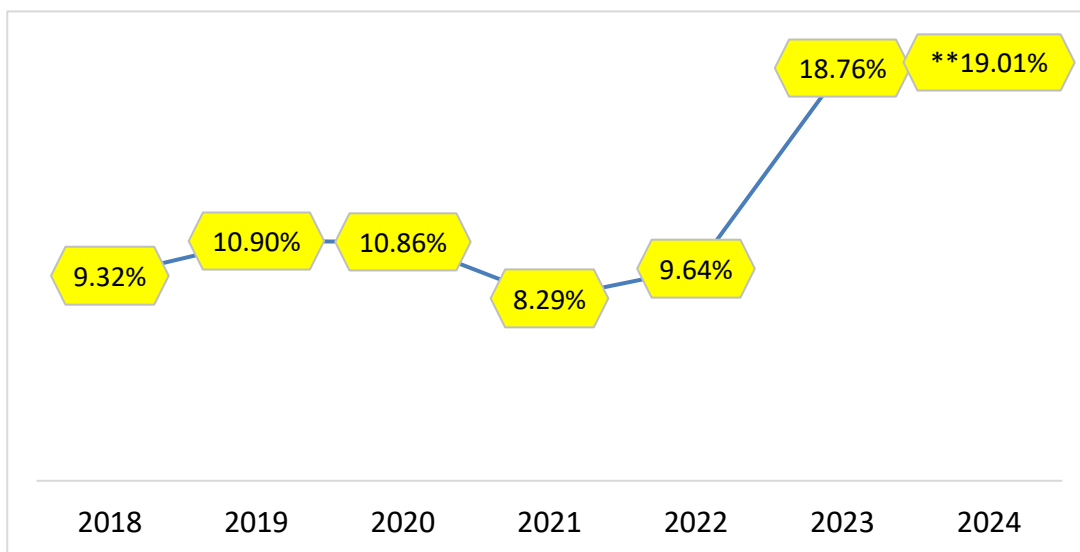


Fig. 12: THE PERCENTAGE CONTRIBUTION OF FISHING TO THE AGRICULTURE SECTOR FROM 2018 TO 2023.

\*\* Estimated

The fisheries sector plays an essential role within the broader Agriculture, Forestry & Fishing economic category. From 2018 to 2020, the fisheries sector contributed between 9.32% and 10.90% to the agricultural sector. The percentage contribution dropped to 8.29%, in line with the overall reduction in fisheries output in that year. The contribution of fisheries to agriculture rose to 9.64%, reflecting the sector's recovery, but it remained in line with its historical average from 2018 to 2020. A striking increase in the fisheries sector's contribution to agriculture was observed in 2023 when it jumped to 18.76%. This nearly doubling of the percentage contribution suggests that the fisheries sector played a far more significant role in agricultural growth. The contribution of the fisheries sector to agriculture is expected to rise slightly to 19.01%. This modest increase indicates continued growth, although it is unlikely to replicate the dramatic surge seen in 2023.



The sector is projected to grow by 7.5% in 2024. This forecast represents healthy growth after the extraordinary gains in 2023.

To maintain this growth, the sector will need to continue focusing on sustainable practices, managing environmental risks, and navigating any regulatory changes. Additionally, the sector should continue adapting to market trends, whether from domestic or international demand, to sustain this growth in the long run.



Photo: NFA's Acting Senior Director of Capture Fisheries Extension Service Ms Shellene Berry chats with Mrs Mitchell of the Morant Bay Fisherfolks Association.

## Fish Price Index

The table provides a valuable snapshot of fish prices in different parishes. The analysis highlights general price trends, consistent market values, and some regional variations. Further research into seasonal factors, supply and demand dynamics, and market trends is needed for a more comprehensive understanding.

PARISH	SNAPPER	PARROT	DOCTOR	JACK	GRUNT	BARACUDA	TUNA	WRENCHMAN	KING FISH
St. Ann	\$1,000	\$950	\$900	\$850		\$800	\$1,000	\$900	
St. Mary	\$950	\$1,000	\$850	\$800	\$850		\$850		
St. James	\$1,000	\$1,100	\$800	\$850	\$850	\$850	\$900	\$850	\$900
Trelawny	\$1,000	\$1,000	\$800	\$900	\$800	\$800			\$900
Westmoreland	\$950	\$1,000	\$850	\$850	\$800	\$800		\$800	\$850
St. Elizabeth	\$1,000	\$1,000	\$850	\$800	\$800				\$900
St. Catherine	\$950	\$1,000	\$800	\$850	\$750	\$850	\$850	\$950	\$850
Kingston	\$1,100	\$1,100	\$900	\$850	\$800	\$850			\$900
Hanover	\$1,000	\$950	\$850		\$800		\$950		
St. Thomas	\$900	\$950	\$800	\$850	\$800	\$900			\$950
<b>AVERAGE</b>	<b>\$985</b>	<b>\$1,005</b>	<b>\$840</b>	<b>\$844</b>	<b>\$806</b>	<b>\$836</b>	<b>\$910</b>	<b>\$875</b>	<b>\$893</b>

Table 13: THE AVERAGE PRICE AT FIRST PURCHASE FROM FISHERS BY PARISH DURING THE PERIOD APRIL – JUNE 2024.

(lowest prices highlighted in green and highest in red for most common).

Snapper and Parrot fish were the most expensive fish across all parishes, with prices ranging from \$900 to \$1,100. Wrenchman and Kingfish generally have the lowest prices, with a range of \$800 to \$950. There's a noticeable consistency in pricing across parishes, with relatively small price differences between locations for each fish. Most fish prices fall within a moderate range of \$800 to \$1,100.



Regarding price stability and consistency prices across the different parishes are generally consistent, with a relatively narrow range for each fish. This suggests a stable market with predictable pricing. The consistent pricing across locations indicates a steady demand for these fish across the region, likely driven by local consumption. Fishers can expect a relatively stable income stream, reducing financial risk associated with price fluctuations. Snapper and Parrot command the highest prices, suggesting a premium market for these fish. This could be due to factors like high demand, limited supply, or perceived quality. Most fish fall within a moderate price range, indicating a broader market appeal and likely cater to a larger customer base. Wenchman and King Fish have lower prices, potentially targeting a cost-sensitive customer segment or indicating a higher supply. Table 12 highlights a diverse range of fish species available, offering opportunities for fishermen to specialize and target specific markets. Consistent pricing suggests a potential for expanding market reach and targeting new customer segments, potentially increasing demand. Stable prices can encourage sustainable fishing practices, as fishermen are incentivized to protect resources for long-term profitability. While stable, the narrow price ranges could lead to increased competition between fishermen, particularly for high-demand species. External factors like weather events, environmental changes, or local market fluctuations could disrupt price stability.



Photo: NFA's Senior Research Officer Mrs Kimberlee Cooke-Panton shows harvested sea moss from the NFA's sea moss production project.





CONCLUSION

CONCLUSION





The **Jamaica Fisheries Quarterly Statistics Report Volume 3 Issue 1** covering the period April to June 2024 provides a comprehensive overview of the performance of the fisheries sector, highlighting both its achievements and challenges. Over the reviewed period, the fisheries sector showed promising growth, with increased marine production and significant advances in licensing activities. Notably, the sector continues to make substantial contributions to Jamaica's agriculture and overall GDP.

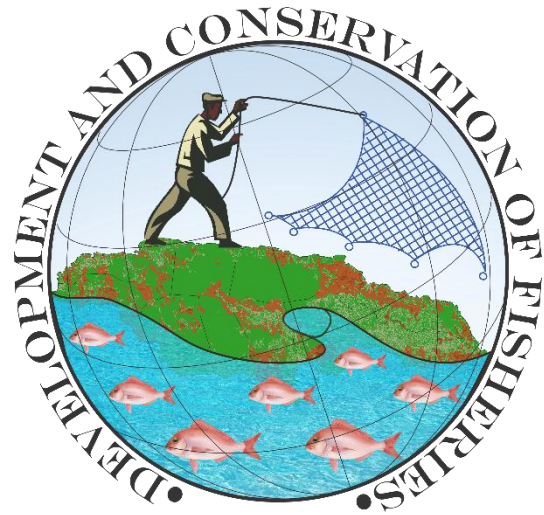
The report reflects a rise in new entrants into the fisheries industry, particularly among younger fishers, suggesting a rejuvenation of the workforce. The strong increase in both new and renewal applications, especially within the 17-35 age group, signals a promising future for the industry, as younger individuals are embracing fishing as a long-term profession. The commitment of fishers within the 36-55 age group remains critical to the sector's continuity, with a substantial number renewing their Licences.

Despite these positive indicators, the industry faces notable challenges. The decline in Licence renewals among the 56 & older age group could lead to a potential gap in experience and knowledge. This highlights the need for training and mentoring programs to ensure that the younger generation can gain the necessary skills to sustain the sector in the long term.

The report also underscores the importance of continued investment in compliance and enforcement activities. The National Fisheries Authority (NFA) has made strides in increasing site visits and regulatory measures, but challenges such as non-compliance and illegal fishing practices still persist, particularly in remote areas. Efforts to improve licensing compliance and enforce sustainable fishing practices will be crucial for the sector's future stability.

In conclusion, the fisheries sector in Jamaica has shown remarkable resilience and growth, particularly in 2023 and 2024. However, to sustain this positive trajectory, a focus on sustainable fishing practices, compliance with regulations, and nurturing the next generation of fishers will be essential. With continued efforts from the NFA and stakeholders, the sector is poised to remain a vital contributor to Jamaica's economy and food security in the years to come.





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