National Fisheries Authority

JAMAICA FISHERIES:

Quarterly Statistics Report

Volume 3: Issue 2

JULY – SEPTEMBER 2024

National Fisheries Authority

Welcome

Dear Stakeholders,

We are pleased to present Volume 3 (Issue 2) 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

National Fisheries Authority

SCAN THE QR CODE TO BROWSE OUR CORPORATE WEBSITE

www.fisheries.gov.jm

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.

Table of Contents

Photo 1: Fisheries Compliance, Licensing and Statistics Division Field and Extension Services Officers participating in a recent training exercise.

Tables and Figures

PAGE

LIST OF TABLES

LIST OF FIGURES

Photo 2: 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

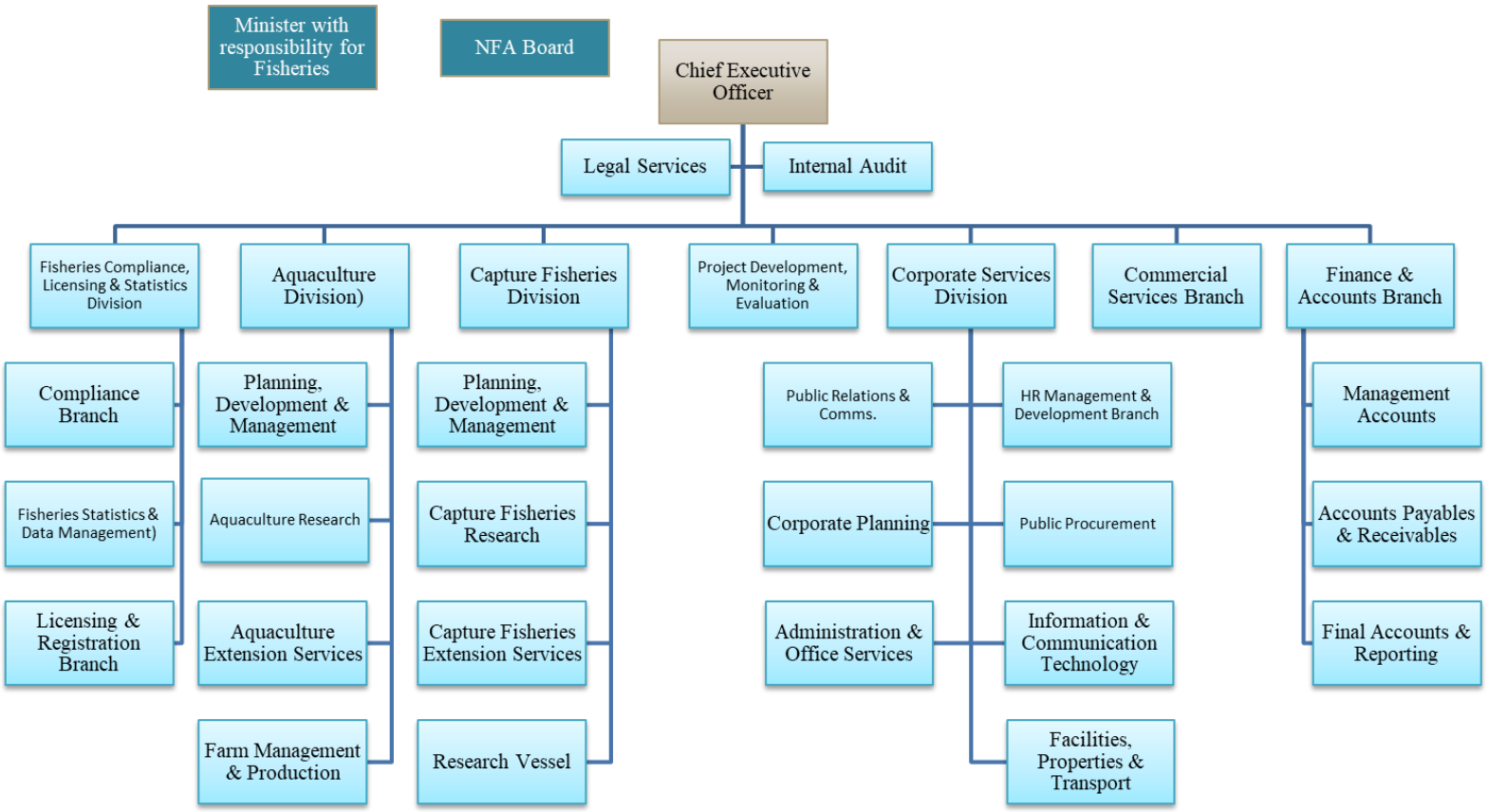

Photo 3: NFA's Capture Fisheries Division members engage local Fishers in a recent field research activity.

Photo 4: NFA's Aquaculture Division conducting a hands-on pond preparation training session in the Hill Run Community.

Big Splashes in Q2 2024/25

Contributions and Achievements

8 Quarterly Statistics Report published since 2022.

$1.2M+ In fines for 2024

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

480 Vessel Licences issued in Q2

54% Licence Renewal Rate

USD 141M In earnings for marine production since Jan. 2024

1,200+ Compliance Site Visits

4 Outdoor Licensing sessions in Q2

2121 Fisher Licences issued in Q2

9,700+ MT Marine fish production since Jan. 2024

720 acres In aquaculture production for Q2 2024/25.

70% Increase in new Licence applications for the 17-35 age group

16% Increase in licence renewal applications for the 17-35 age group

529 MT Aquaculture fish production since Jan. 2024 valued at **USD 3.6M**

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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; commercial and recreational fishers, and Aquaculture.

The Major Categories of Fishing

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

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 that 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 and in some riverine / ponds to a smaller extent. All artisanal landings are for the domestic markets, while 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 farmed freshwater finfish in Jamaica consist mainly of freshwater tilapia.

Photo 5: Oracabessa 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.

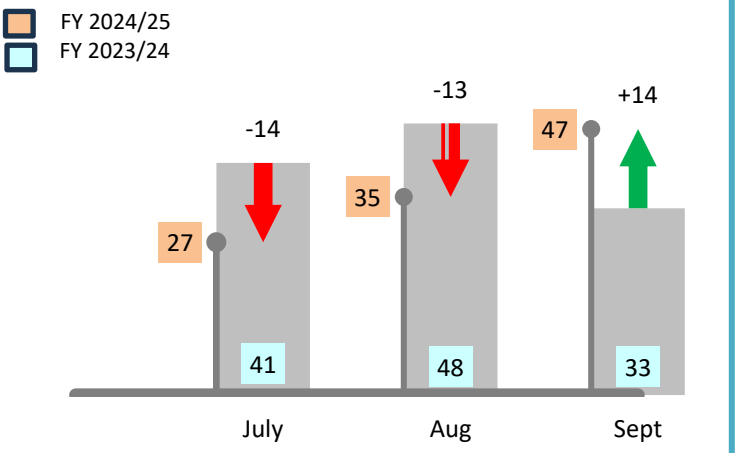


Figure 1: New vessel licence issued, Q2 2023/24 VS

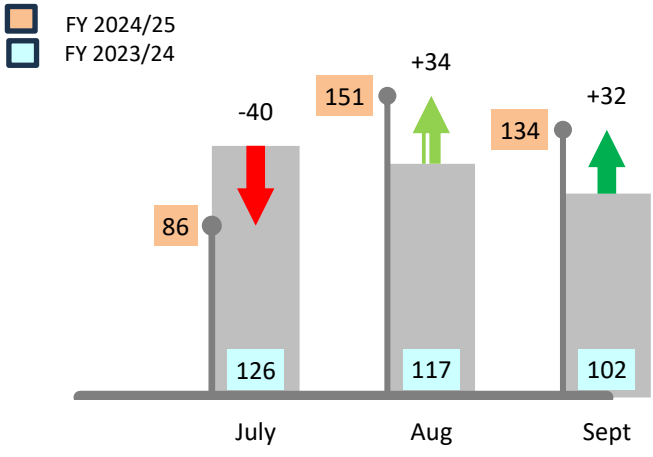


Figure 2: Renewed vessel licence issued, Q2 2023/24 VS

Figure 1 indicates a 34% decrease in new vessel licences issued in July 2024/25 compared to July 2023/24 (from 41 to 27). In August 2024/25, there was a 27% decline (from 48 to 35) compared to the previous year. Conversely, September 2024/25 saw a 42% increase in new licences issued, rising from 33 to 47. Overall, Q2 2024/25 experienced a decline compared to Q1 2024/25, but an increase year-over-year when comparing Q2 2024/25 to Q2 2023/24.

In Q2 2024/25, new vessel licenses showed mixed results: April saw a 34% decrease (41 to 27), and August a 27% decline (48 to 35) compared to the previous year. However, September experienced a 42% increase (33 to 47) year-over-year. Overall, Q2 2024/25 declined compared to Q1 2024/25 but increased from Q2 2023/24.

Photo 6: L-R: Richard Barcoo [Chief Compliance Officer - Eastern] converses with Dr Zahra Oliphant, Principal Director - FCLS.

	JULY	AUGUST	SEPTEMBER	TOTAL
ARTISANAL	76	137	111	324
INDUSTRIAL	19	9	3	31
RECREATIONAL	8	1	3	12
CAY	0	0	0	0
SPORTS CHARTER	0	2	1	3
TEMP VESSEL CERTIFICATE	1	2	1	4
CONCH	0	0	0	0
TOTAL	**104**	**151**	**119**	**374**

Table 1: NUMBER OF BOAT LICENCES ISSUED BY CATEGORY, JULY TO SEPTEMBER 2024.

The "Artisanal" category accounts for the vast majority of Licences issued each month, with a total of 324 (86%) 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. August recorded the highest number of licences, followed by September, and then July.

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 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 September 2024 recorded a 3% increase in vessel licence issued.

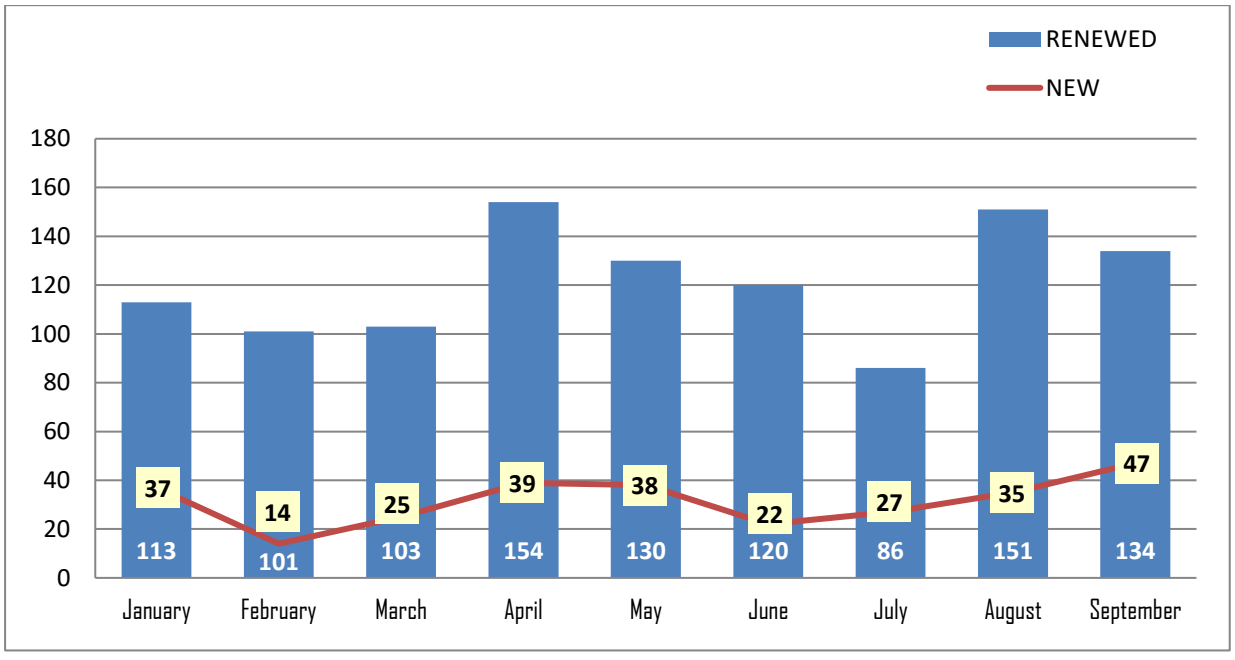
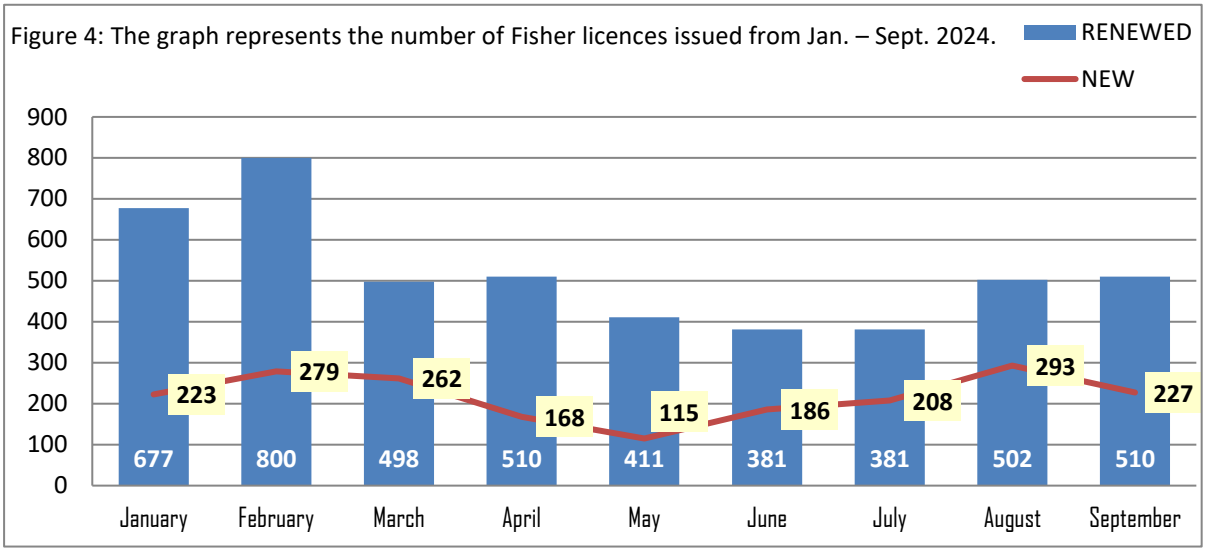


Figure 3: Vessel license issued MoM in 2024.

Fisher's Licence

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

Figure 4: The graph represents the number of Fisher licences issued from Jan. – Sept. 2024.



A total of 2121 licences were issued to individual fishers in Q2 2024/25. Fig. 4 The graph depicts the number of fishing licences issued from January to September 2024, divided into "Renewed" and "New" categories. Renewed licences peaked in February with 800 and dropped to their lowest in June and July at 381, before rising to 510 by September. New licences were highest in August at 293 and lowest in May at 115.

YEAR	% renewing license from the previous year
2017	
2018	19%
2019	26%
2020	24%
2021	25%
2022	20%
2023	38%
**2024	54%
	Average: 29%

**Jan-September

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

Table 2 The table provides data on the percentage of fishing and vessel licences renewed from the previous year between 2017 and 2024. The renewal rate shows a general upward trend, starting at 17% in 2017 and increasing to 54% by 2024 (January to September). Notably, there are more marked increases in renewal percentages from 2019 (19%) to 2020 (26%) and a more significant increase from 2022 (30%) to 2023 (38%). The average renewal rate over these years is 29%. This upward trend indicates a growing retention of licence holders over the period, with the most substantial increase occurring in the first nine months of 2024.

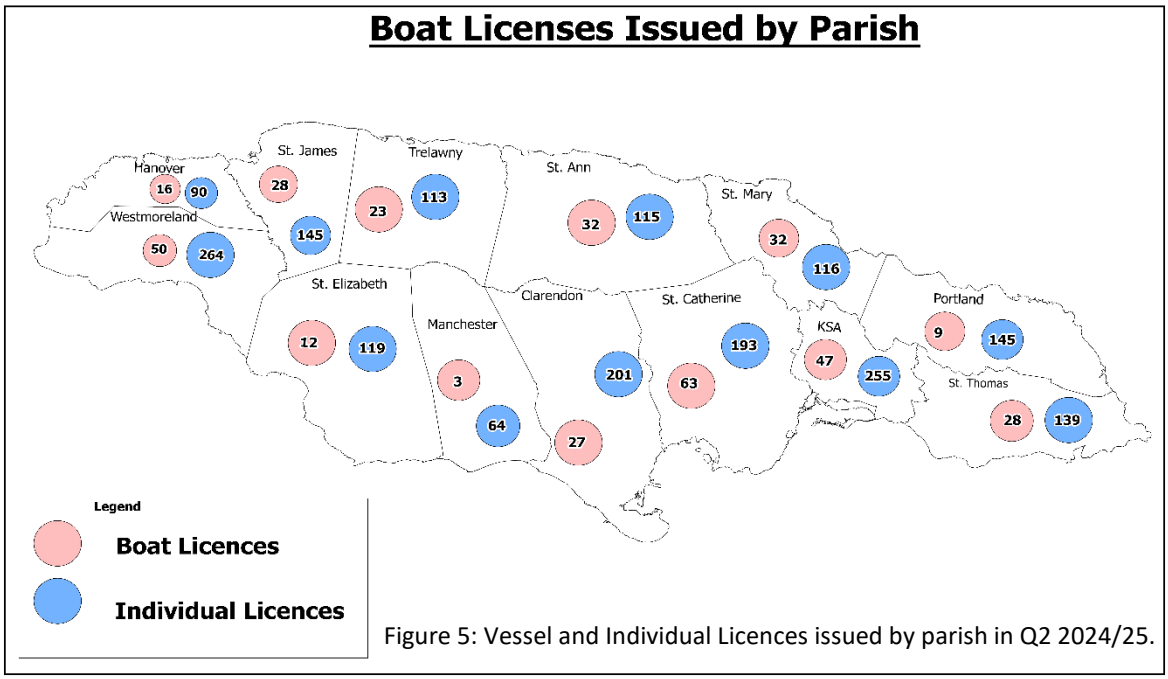


Figure 5: Vessel and Individual Licences issued by parish in Q2 2024/25.

Compliance

Jamaica's fishing sector faces significant challenges in achieving full compliance with regulations. Issues such as operating without licenses, using prohibited gear, and exceeding catch limits are common, leading to illegal fishing practices that undermine sustainable management. Additionally, many fishers underreport their catches, complicating the assessment of fish stocks and the effective enforcement of quotas.

In response to these challenges, the National Fisheries Authority (NFA) has implemented several measures to enhance compliance, including establishing close seasons for certain species, setting quotas for catch limits, enhancing data collection initiatives and increasing patrol efforts through the NFA Compliance Unit. The authority has also introduced penalties for violations to deter non-compliance.

These efforts have yielded positive results, evidenced by a 42% increase in the license renewal rate year-over-year. This proactive approach is crucial for promoting sustainable fishing practices and ensuring the long-term health of Jamaica's fishery resources.

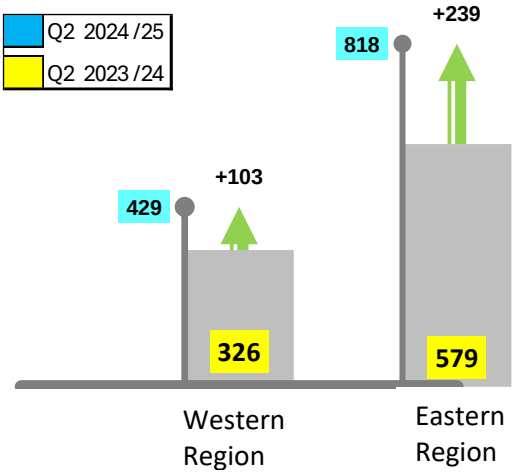


Figure 6: Site visits conducted by the Compliance Unit by region, Q2 2023/24 vs 2024/25.

Photo 7: NFA's CEO Dr. Gavin Bellamy engage the audience at a recent Blue Justice Initiative.

The graph (Figure 6) compares the number of site visits conducted by the Compliance Unit in Jamaica during the second quarter of 2023/24 and 2024/25, separated by region (Western and Eastern). Overall, there was a 38% increase in site visits by the compliance team, 905 in Q2 2023/24 compared to 1,247 in Q2 2024/25. When combining both regions, there were 342 more site visits executed in Q2 2024/25 compared to Q2 2023/24. This suggests an overall YoY increase in compliance activity by the Compliance Unit.

Photo 8: NFA's Compliance Officer Treverton Bryan conducting a sensitization session with the Port Royal JDF Coast Guards.

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

- Increased sensitization and education sessions.
- Non-compliance or suspected violations.
- Specific initiatives targeting compliance.

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.

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

2019	2020	2021	2022	2023	**2024	TOTAL
$2,642,000	$180,000	$1,145,000	$9,156,000	$4,806,700	$1,220,000	$19,149,700

** Jan - September

Table 3 displays the data on fines collected from breaches of the Fisheries Act from 2019 to 2024 (January to September). The total amount collected over these years is $19,149,700. The highest annual collection was in 2022, with $9,086,700, indicating a significant increase from 2021's $1,145,000. The current partial year, 2024, has collected $1,220,000, showing potential for reaching or surpassing previous years' totals if trends continue.

In-field licensing and compliance activities

Photo 9: Licensing Officer Asheika Howell conducting licensing activities with local fishers in Hunts Bay.

Photo 10: Licensing Officer Latoya Brown conducting licensing activities with local fishers in Rocky Point.

Photo 11: NFA's Compliance team conducting enforcement/ sensitization activities.

Photo 12: NFA's Chief Compliance Officer Richard Barcoo in discussions with members of the Licensing Unit at Welcome Beach. Senior Capture Fisheries Extension Officer Fabian Gordon is seen at the back.

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 340 species of fish being caught, compared to 370 species over the previous quarter (Q1 2024/25). 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	GROUPER	WRENCHMAN	TARPON	BUTTER FISH	KING FISH	MARLIN
St. Ann	✓	✓	✓	X	✓	X	✓	X	X	✓	✓	X	✓	X	✓
St. Mary	✓	✓	X	✓	✓	X	X	✓	✓	✓	X	X	X	X	✓
St. James	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Trelawny	✓	✓	✓	✓	✓	✓	X	X	X	X	X	X	X	✓	✓
Westmoreland	✓	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	✓	✓	✓
St. Elizabeth	✓	✓	✓	✓	X	X	X	X	X	X	X	✓	✓	✓	X
Clarendon	✓	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	✓	✓	X
Manchester	✓	✓	X	X	✓	✓	X	X	✓	✓	✓	✓	X	✓	X
St. Catherine	✓	✓	✓	X	✓	✓	✓	X	✓	X	X	✓	✓	X	X
Portland	✓	✓	X	✓	✓	X	X	✓	✓	✓	✓	X	✓	✓	✓
KSA	✓	✓	✓	X	✓	✓	✓	X	✓	✓	X	✓	✓	✓	X
Hanover	✓	✓	X	✓	X	✓	X	✓	✓	✓	✓	X	✓	X	✓
St. Thomas	✓	✓	✓	X	✓	✓	X	X	✓	✓	X	✓	✓	✓	X

Table 4: COMMON FISH VARIETY CAUGHT PER PARISH IN Q2 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. 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	1,158.93		4th Quarter FY23/24	2,618,379,171.44		4th Quarter FY23/24	16,784,481.87		4th Quarter FY23/24
February	587.88			1,338,503,734.79			8,514,113.19		
March	915.70	**2,662.51**		2,060,360,242.00	**6,017,243,148.22**		13,261,845.02	**38,560,440.08**	
April	1,282.71		1st Quarter FY24/25	2,900,822,819.68		1st Quarter FY24/25	18,577,155.43		1st Quarter FY24/25
May	839.33			1,908,095,637.83			12,155,798.16		
June	1,221.35	**3,343.39**		2,753,391,053.71	**7,562,309,511.23**		17,688,494.50	**48,421,448.09**	
July	723.28		2nd Quarter FY24/25	1,637,778,161.87		2nd Quarter FY24/25	10,475,076.19		2nd Quarter FY24/25
August	1,092.48			2,478,374,338.48			15,822,103.80		
September	1,943.14	**3,758.90**		4,419,981,169.85	**8,536,133,670.20**		28,141,991.40	**54,439,171.39**	
TOTAL		**9,764.80**			**22,115,686,329.65**			**141,421,059.55**	

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

Table 5 shows an increase in both the weight of fish caught and the estimated value of those catches over the nine months from January to September 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 fish production data for the first nine months of 2024 shows a total marine production weight of 9,974.80 metric tons. The estimated value of this production is approximately JMD22B, translating to around USD 141M. The data suggests significant production in certain months, with April standing out, indicating a peak production period that contributed substantially to the annual total. For July – September 2024, marine finfish production was 3,758.90 MT (Table 5), which yields an approximate value of USD 54 Mil or JMD$8.5 billion (Table 5).

Photo 13: Our fishers are reaping the rewards of their pelagic training, hauling in impressive catches like these 82lbs and 50lbs marlin and 28.4lbs mahi

Fishery	2024									Total	% Composition
	January	February	March	April	May	June	July	August	September		
Atrisanal finfish	1,158.93	587.88	915.70	1,282.71	839.33	1,221.35	723.28	1,092.48	1,943.14	**9,764.80**	96.13
Sea Cucumber	8.28	0	0	0	0	0	0	0	0	**8.28**	0.08
Industrial Conch			42.56	79.1	136.62	28.38	31.59			**318.25**	3.13
Industrial Spiny Lobster*	29.25	5.44	5.35				2.67	21.51	2.74	**66.96**	0.66
Total Marine Production	**1196.46**	**593.32**	**963.61**	**1361.81**	**975.95**	**1249.73**	**757.54**	**1113.99**	**1945.88**	**10,158.29**	**100**

** Reported weight for whole, tail and head meat*

Close Season

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

Table 6 presents marine production data for 2024 (up to September) for various marine fishery groups (artisanal finfish, sea cucumber, industrial conch, and industrial spiny lobster). The production of artisanal finfish varies significantly from month to month. September saw the highest production with **1,945.88 MT**, followed by April (**1,361.81 MT**). Production dropped in May to **975.95 MT** and July to **757.54 MT**, but it partially rebounded in August (**1113.99 MT**) and September (**1945.88 MT**).

The 12% increase in Q2 marine fish production when compared to Q1 was considered a result of improved fishing techniques, as the Agency has embarked on numerous training programs involving Fishers from varied fishing communities. For the nine months, artisanal finfish production totals **9,764.80 MT**. Sea cucumber was reported for the first month of 2024, amounting to **8.28 MT**, industrial conch production showed a steady in-season production performance from **42.55 MT** in April to **31.59 MT** in June, peaking at **136.62 MT** in May. The total production of marine resources over the nine months is **9,764.80 MT**. Artisanal finfish is by far the largest contributor to marine production, making up the bulk of the total catch, accounting for **96.13%** of total marine production. The Lobster Close Season runs from April to June and for the Conch fishery from August to February.

Fishery	2024 (USD)										% Contribution
	January	February	March	April	May	June	July	August	September	Total	
Atrisanal finfish	16,784,481.87	8,514,113.19	13,261,845.02	$18,577,155	$12,155,798	$17,688,494	$10,475,076	$15,822,104	$28,141,991	$ 141,421,060	91.85
Industrial Conch			$ 1,051,062	$ 1,953,454	$ 3,373,968	$ 700,872	$ 780,147			$ 7,859,502	5.10
Industrial Spiny Lobster*	$ 2,047,756	$ 380,848	$ 374,547				$ 186,923	$ 1,505,888	$ 191,824	$ 4,687,786	3.04
Total Marine Production	**$ 18,832,238**	**$ 8,894,961**	**$14,687,454**	**$20,530,609**	**$15,529,766**	**$18,389,367**	**$11,442,146**	**$17,327,992**	**$28,333,815**	**$ 153,968,347**	100.00

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

Biological Data for Marine Species

Lobster

Period	Total Sample	Male %	Female %	Females with Tar Spot	Females With Scratched Tar Spot	Avg. Carapace Length (cm)	Avg. Tail Length (cm)	Avg. Telson Length (cm)	Avg. Body Depth (cm)	Avg. Whole Weight (g)	Avg. Tail Weight (g)
Q1 :Jan-Mar	262	36%	64%	2%	2%	8.56	45.05	14.38	6.22	552.36	233.10
Q2 : July-Sep	477	44%	56%	0.3%	0%	8.22	31.81	9.86	5.92	512.63	255.00
Q1-Q2						0.34	13.24	4.52	0.30	39.73	-21.90
t-test p-value, 95% sig.*						0.03975*	0.001688*	0.0009505*	0.002192*	0.1398	0.001014*

Table 8: SUMMARY COMPARISION OF BIOLOGICAL SAMPLING OF SPINY LOBSTER.

The number of lobsters sampled for the current quarter was 477, an 82% increase over the previous quarter. The sex ratio of the sample was approximately 8:2, including 77% males and 23% females. Females showing visible reproductive signs were>1% for both tarred and scratched females. In terms of body metrics for this quarter and the previous one, there were statistically significant increases in the average carapace length, tail length, telson length, and body depth along with a significant decrease in the average tail weight. There was an increase in average body weight, but this increase was not significant. The mean carapace length for this quarter of 8.22cm was well above the minimum 7.62cm imposed by regulation.

Photo 14: Caribbean Spiney Lobster being weighed as part of the biological sampling process.

The relationship between the carapace length and whole-body weight is an important management indicator to ensure the sustainability of our lobster stocks and the protection of juveniles and spawners. This quarter's sample indicated a linear relationship defined by: Whole weight = 162.89(X) + (-803.87).

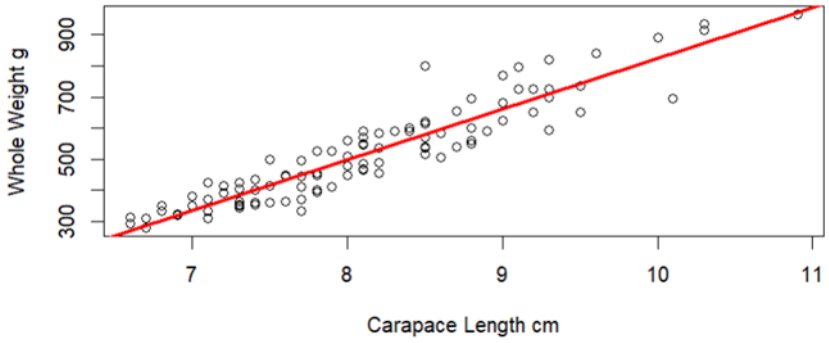


Figure 7: RELATIONSHIP BETWEEN SPINY LOBSTER WHOLE WEIGHT AND CARAPACE LENGTH FOR THE QUARTER.

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	4219	43%	57%	130.99	135
TOTAL	**12157**				

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

The close season for the conch was March 1, 2024, to July 31, 2024. Therefore, only vessels or companies who would have declared duly fished conch within 21 days of the closed season would be legally able to export or deal in conch. A total of 811 conch samples were processed at the 50% clean processing level for export, having a sex ratio of 43% male to 57% female. The mean weight after processing was 145.5g with a range of 55 to 300g. Females were larger with a mean of 148.87g while males were smaller with a mean of 140.79g. This difference was statistically significant (p-value= 0.01462) at the 95% confidence level. Compared to the previous years, these means for the 50% cleaned level are greater than the means of the previous year's suggesting that conch are on average becoming larger.

Photo 15: Measuring the thickness of the Queen Conch (*Aliger gigas*) shell one can determine the age.

Aquaculture Production

To date, in 2024, the Aquaculture sector comprises approximately 720 acres of ponds and tanks, with 593.46 acres currently in production. The total number of registered fish farms stands at 114, including hatchery and Production. Aquaculture Production was 529.25 MT for the period January to September; 2nd Quarter (July – September) recorded 165.16MT of food fish production.

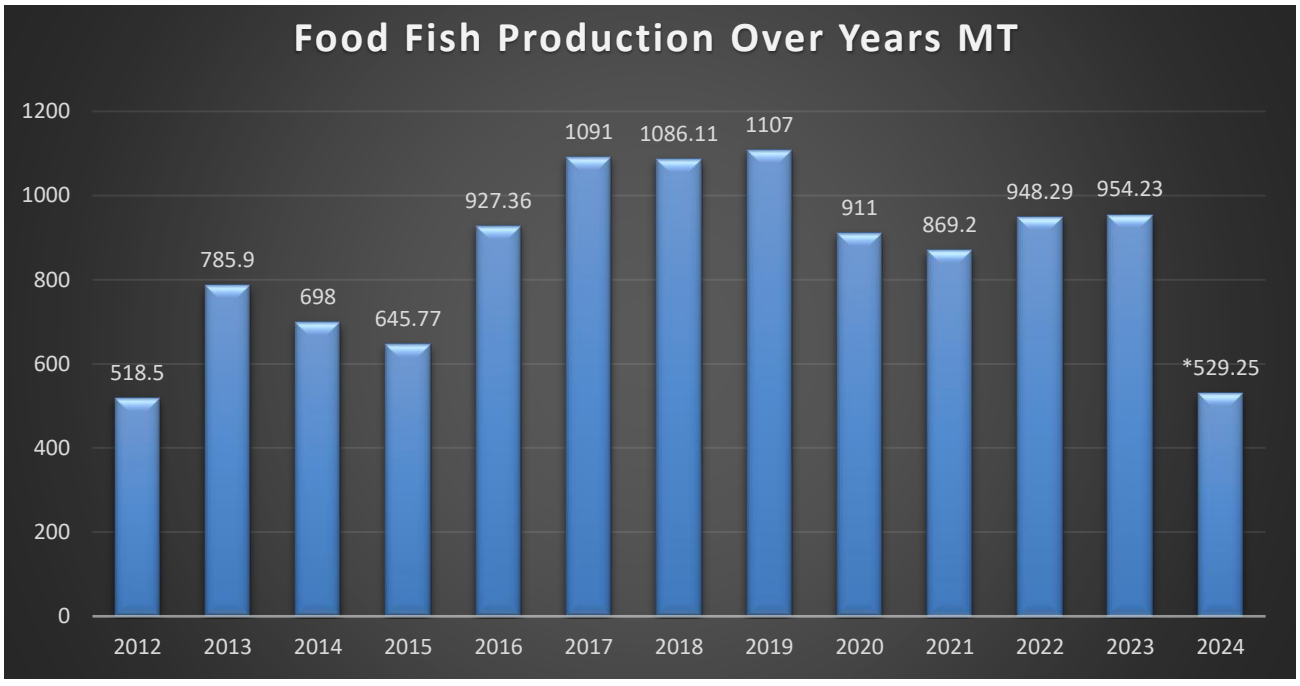


Figure 8: Aquaculture production in MT from 2012 to 2024.
* January to September

Photo 16: NFA's Team at a 4H Club Achievement Day exhibition in St. Catherine.

Photo 17: Tilapia seed stock.
Source: Wenderson Araujo

Figure 8 shows trends in food fish production from 2012 to 2024. From January to September 2024, 529.25MT of food fish were farmed, with an estimated value of USD 3.3M or JMD 525M. There was an 18% decline in Q2 2024/25 in aquaculture production compared to last year. Over 500,000 aquaculture seed stock were produced in Q2 2024/25. The overall trend shows initial growth and stabilization of food fish production, followed by periods of decline and modest recovery. However, the decline in production for the 9 months of 2024 is attributed to the exit of a major Aquaculture farmer and reduced acres in production.

In-field aquaculture activities

Photo 18: NFA's Senior Research Officer Mrs. Leanne Bennett engages a local oyster farmer on the technique of measuring the species.

Photo 19: NFA Aquaculture Krystal Facey presenting on the authority's continuous efforts in researching to ensure the growth of the Aquaculture sector.

Photo 20: NFA Aquaculture Principal Director Mrs. Avery Smikle being interviewed by a local radio station.

2024	Total Acres	Current Production	Acres in Production %	Total Harvest (MT)
Jan - Mar	837.87	716.61	85%	179
April - June	839.06	599.61	71%	173.3
July – Sept.	720	593.46	82%	165.1

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 21 (L-R): NFA CEO Dr Gavin Bellamy, Minister of Agriculture, Fisheries & Minning Hon. Floyd Green and NFA Aquaculture Senior Director Dehaan Brown examine one of the tilapia seedlings ponds at NFA Tilapia Hatchery in St. Catherine.

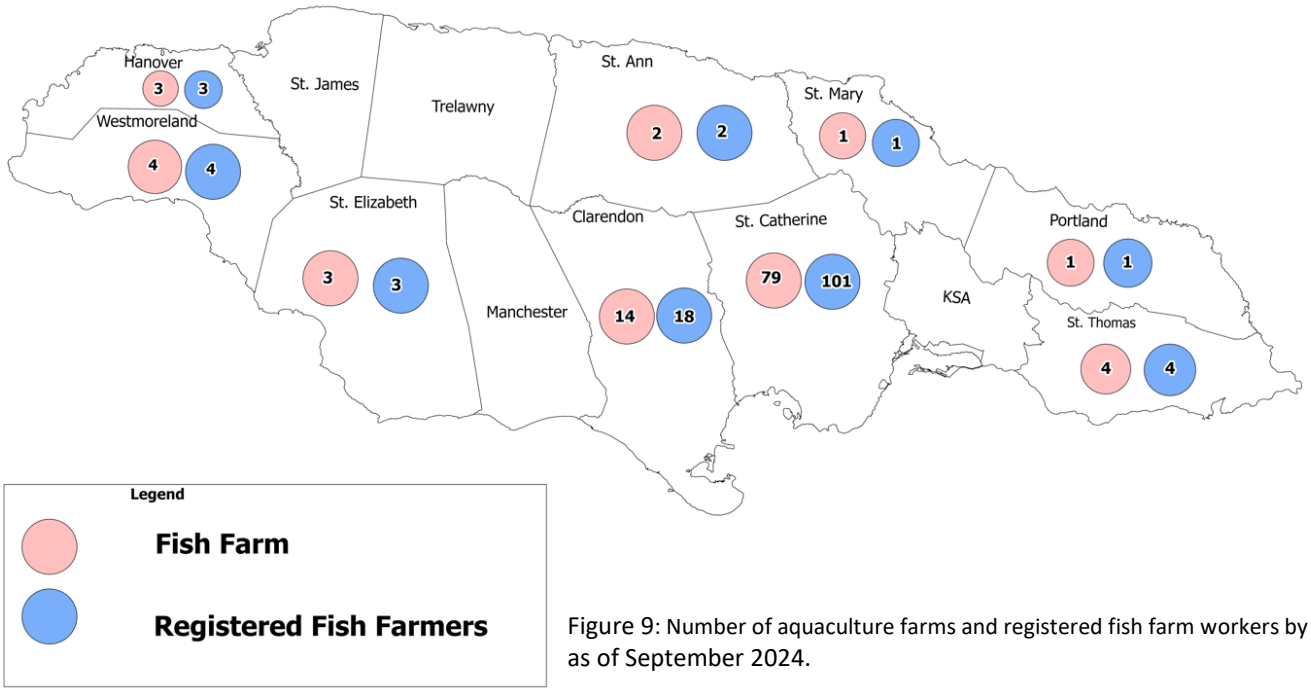


Figure 9: Number of aquaculture farms and registered fish farm workers by parish, as of September 2024.

ECONOMIC PERFORMANCE OVERVIEW

Socio-Economic Status

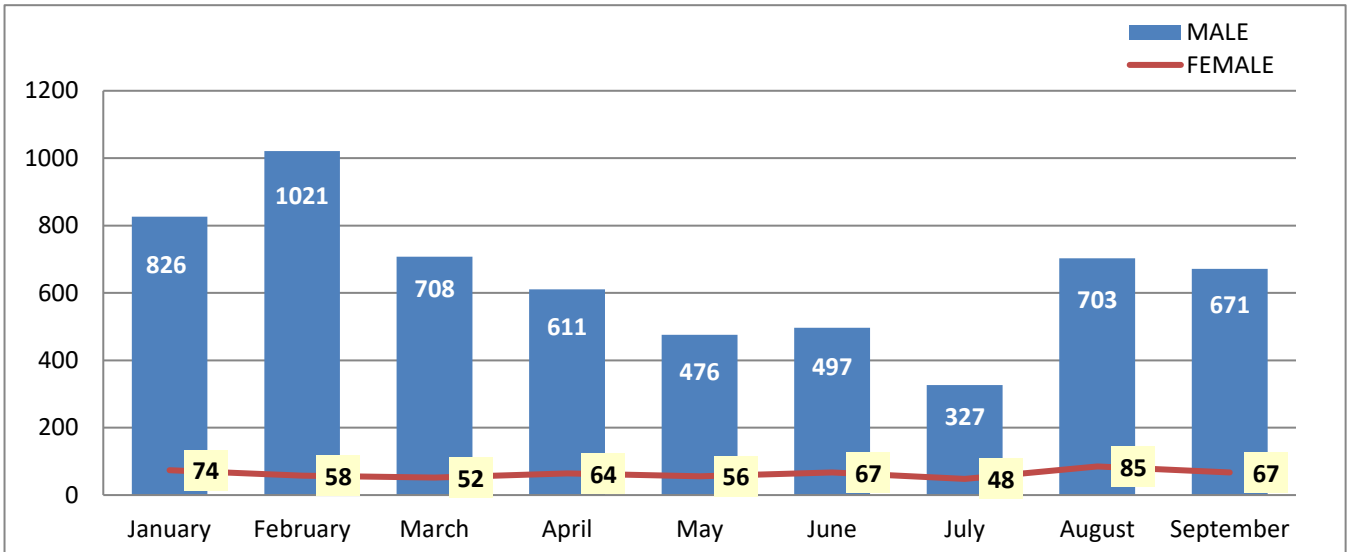


Figure 10: GENDER OF FISHERS RECEIVING LICENCES IN 2024.

The graph illustrates the monthly count of male and female fishers licensed. 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 for the next 5 months. August recorded a 114% increase over the previous month and this increase continued into September. August has a notably higher number of female fishers compared to other months. For fishers applying for and renewing their licenses, the monthly average of male fishers is 649, female fishers average around 63. The ratio of male to female fishers is roughly 14:1.

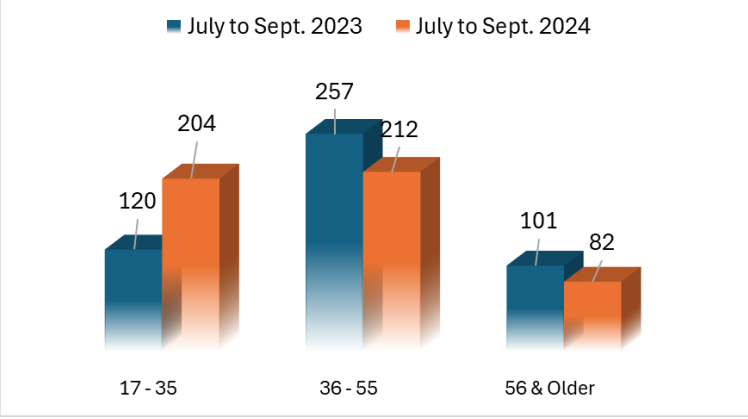


Figure 11: AGE OF NEW FISHERS APPLICATION Q2 2023/24 vs Q2 2024/25.

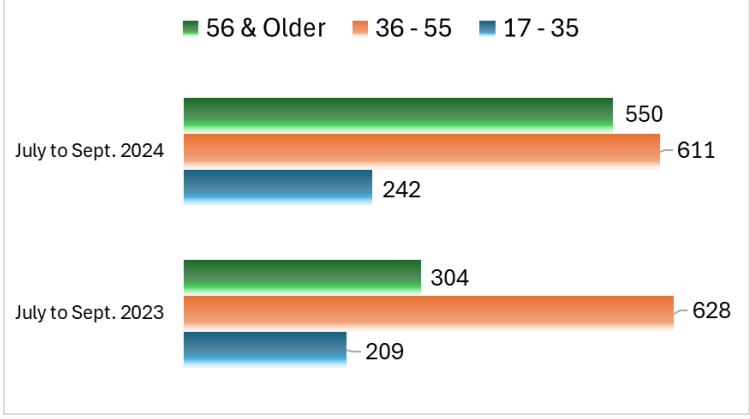


Figure 12: AGE OF RENEWAL FISHERS APPLICATION Q2 2023/24 vs Q2

Figures 11 and 12 highlight the new and renewal fisher applications, the 17-35 age group increased from 120 to 204 for new applications YoY representing a 70% 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 17% from 257 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 an 18.8% decline from 101 to 82 applications YoY highlighting 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 an increase of 16% from 242 to 209 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. There was a minimal decline within the 36-55 age group of 3% YoY for renewal applications from 628 to 611. This group is 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.

The number of persons renewing in the 56 & Older age group increased by 16% from 209 to 242 applications YoY, this reflects a notable increase in the participation of older fishers renewing their Licences. The high number of fishers within 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.

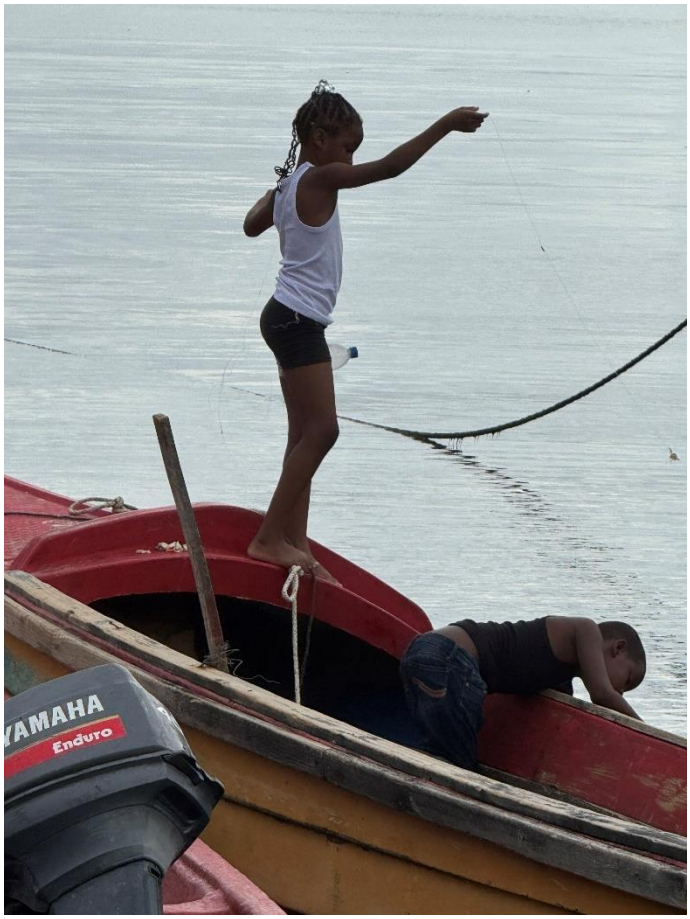


Photo 22: Young fisher embracing the spirit of the sea—learning the ropes and enjoying the adventure on the water.

The increase in renewals from the 56 & older age group suggests that the industry's most experienced fishers are making greater efforts towards adhering to the Fisheries Act. 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.

Gross Domestic Product (GDP) Status

The fisheries sector has shown remarkable growth in recent years, particularly in 2022 and 2024, 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
Agiculture, 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 USD 94.58 million in 2018 and USD 111.02 million in 2019, before slightly declining to USD 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.

Photo 23: Welcome sign to 1 of the 19 fish sanctuaries in Jamaica located in St. Elizabeth.

In 2021 there was a significant drop to USD 90.16 million, reflecting an 18.96% decrease from 2020. This sharp decline is notable and may be influenced by Tropical Storm Grace's impact on the island in 2021. There was a strong recovery in 2022, with a jump to USD 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 USD 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, favourable policy support from the Ministry, or a marked rise in demand for fish products domestically. The fisheries sector is expected to continue its upward trend, reaching USD 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.

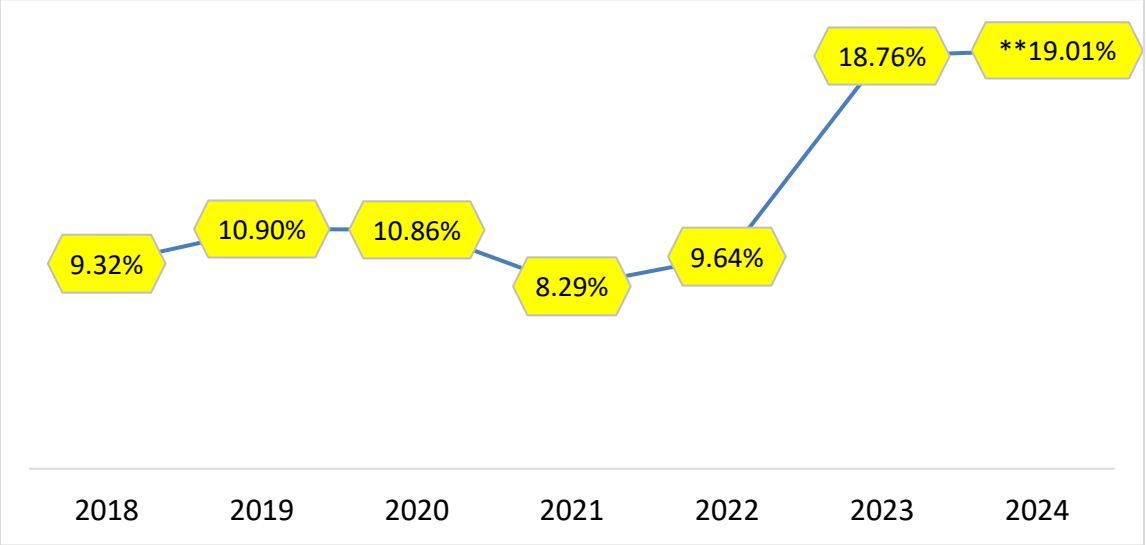


Figure 13: THE PERCENTAGE CONTRIBUTION OF FISHING TO THE AGRICULTURE SECTOR FROM 2018 TO 2024.

** 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 24: NFA's Senior Extension Officer Ms Charlene Thomas presents life jacket to fishers at the Greenwich Fishing Village.

Fish Price Index

The local market for marine fish was dominated by reef fish and offshore pelagic species as these are the primary target species. Prices remained stable throughout the period despite the passing of hurricane Beryl and other adverse weather. The table provides a valuable snapshot of common marine fish prices at the national level.

PARISH	SNAPPER	PARROT	DOCTOR	JACK	GRUNT	BARACUDA	TUNA	WRENCHMAN	KING FISH
St. Ann	$1,100	$1,000	$950	$900		$850	$1,000	$900	
St. Mary	$1,000	$1,000	$900	$850	$850		$950		
St. James	$1,000	$1,100	$950	$850	$900	$900	$1,000	$850	$900
Trelawny	$1,200	$1,000	$900	$950	$850	$950			$950
Westmoreland	$1,000	$1,000	$950	$900	$900	$900	1100	$950	$850
St. Elizabeth	$1,000	$1,000	$950	$850	$800				$900
St. Catherine	$1,000	$1,000	$950	$900	$800	$850		$950	$900
Kingston	$1,100	$1,000	$900	$950	$850	$850			$950
Hanover	$1,000	$1,000	$1,000		$850		$1,000	$1,000	
St. Thomas	$900	$950	$950	$900	$850	$950		$900	$1,000
AVERAGE	**$1,030**	**$1,005**	**$940**	**$894**	**$850**	**$893**	**$1,010**	**$925**	**$921**

Table 13: THE AVERAGE PRICE AT FIRST PURCHASE FROM FISHERS BY PARISH DURING THE PERIOD JULY – SEPTEMBER 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. Grunt and Barracuda had 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 $850 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 catering to a larger customer base. Grunt and Barracuda 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.

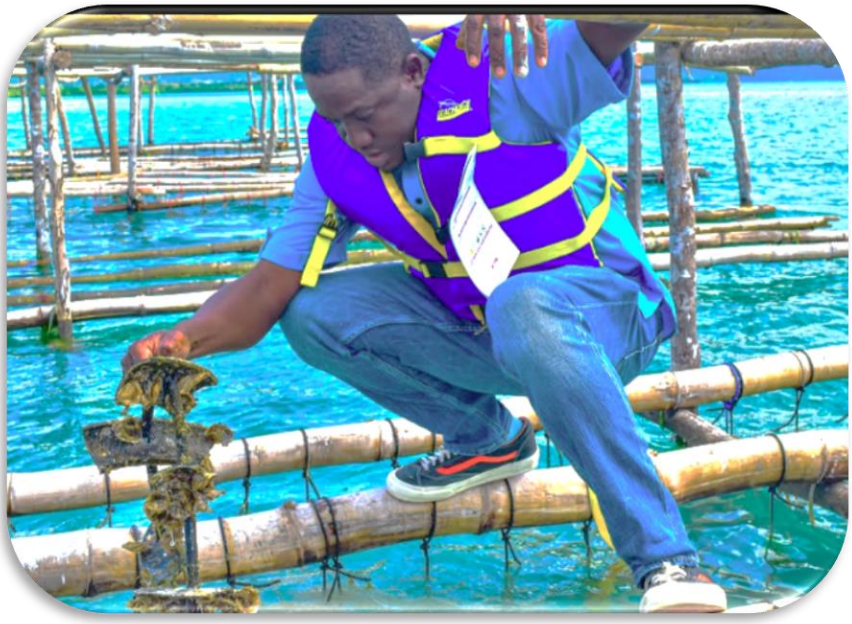


Photo 25: NFA's Regional Extension Officer Howard Simpson pulls out an oyster line from the sea at Western Supreme Oysters & More mariculture facility in Westmoreland.

CONCLUSION

The Jamaica Fisheries Quarterly Statistics Report Volume 3 Issue 2 (July - September 2024) presents a comprehensive overview of the fisheries sector's critical role in the national economy. With over 9,700 metric tons of marine fish produced since January 2024 and an impressive USD 141 million earned from marine production, the sector remains a significant contributor to Jamaica's GDP. The National Fisheries Authority (NFA) has made substantial progress in enhancing data collection and regulatory frameworks, which are essential for effective management. The report indicates a 70% increase in new license applications among the 17-35 age group, reflecting a growing interest among younger generations in pursuing careers in fisheries.

In addition to these encouraging trends, the report highlights notable achievements, such as the issuance of 2,121 fisher licenses in Q2 and an aquaculture production of 529 metric tons valued at USD 3.6 million. These figures point to the NFA's successful outreach and training programs aimed at empowering local fishers and promoting sustainable practices. Furthermore, the compliance unit conducted over 1,200 site visits, emphasizing the agency's commitment to ensuring adherence to regulations and fostering a culture of sustainability within the sector.

Looking ahead, the NFA will continue strengthening partnerships and enhancing regulatory measures to tackle ongoing challenges such as overfishing and climate change. The focus will remain on investing in infrastructure and training to support both capture fisheries and aquaculture. By fostering collaboration among stakeholders and promoting sustainable practices, Jamaica can secure the long-term viability of its fisheries sector, ensuring it continues to provide economic stability and food security for future generations.

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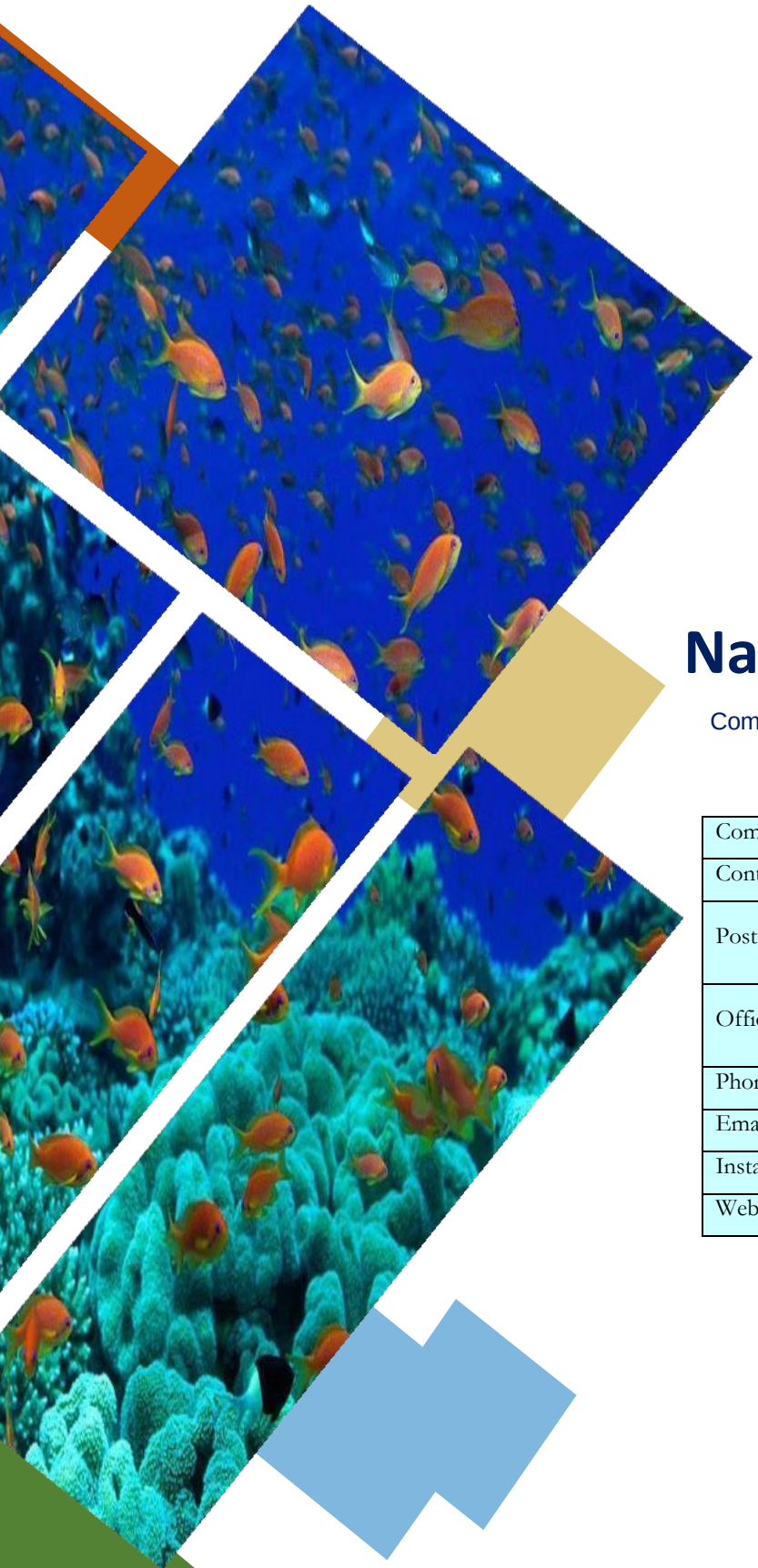

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