National Fisheries Authority

JAMAICA FISHERIES:

Quarterly Statistics Report

Volume 3: Issue 3

OCTOBER – DECEMBER 2024

National Fisheries Authority

Welcome

Dear Stakeholders,

We are pleased to present Volume 3 (Issue 3) 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, use of technology, 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 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

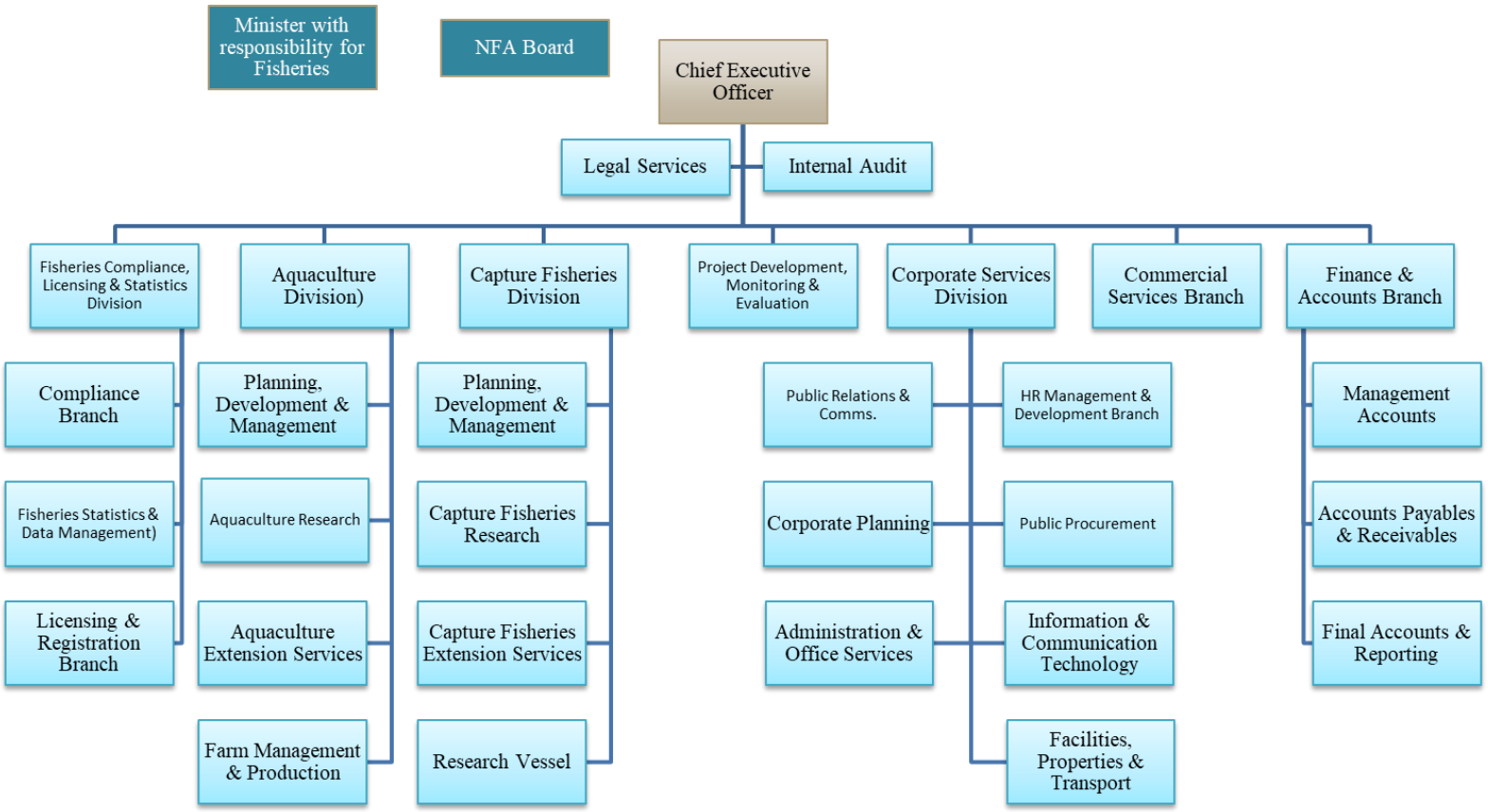

Photo 3: NFA empowering our fishers with new skills. Fishers across Jamaica are learning to make longline gears—unlocking new opportunities for sustainable fishing.

Photo 4: NFA's Regional Extension Officer, Brian Murray, demonstrates the inner workings of the Garmin Fishfinder device during a recent training session held by the NFA and PPCR.

Big Splashes in Q3 2024/25

Contributions and Achievements

9 Quarterly Statistics Report published since 2022.

$2.3M+ In fines for 2024

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

1,969 Vessel Licences issued in 2024

54% 2024 Licence renewal rate

USD 203M In earnings for marine production for 2024

1,400+ Compliance Site Visits

9 Outdoor Licensing sessions in Q3

8,781 Fisher Licences issued in 2024

14,291.28 MT Marine fish production in 2024

597 acres In aquaculture production for Q3 2024/25.

54% Increase in new Licence applications YoY for the 16-29 age group

36% Increase in licence renewal applications YoY for the 30-49 age group

659.25 MT Aquaculture fish production in 2024 valued at **USD 4.5M**

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REGULATORY PERFORMANCE OVERVIEW

Overview of the Fisheries Sector in Jamaica

Jamaica's land area covers about 10,992 km² of the Caribbean Sea. The fisheries sector comprises two key sub-sectors: Capture Fisheries 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 operate in areas including cays, reefs, deep slopes, and nearby open waters. Most fishing vessels use a variety of gear—such as lines, nets, and traps—to harvest a diverse array of finfish, which generally have an average length of nine meters or less.

Jamaica's coastal artisanal fisheries primarily serve local consumption needs. Fishers typically sell their catch to fish vendors. These artisanal landings mainly take place at fishing villages along the coastline, with some smaller contributions from riverine fisheries. All artisanal catches are intended for the domestic market, although certain high-value species like 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: Port Royal Fishing Beach in Kingston.

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.

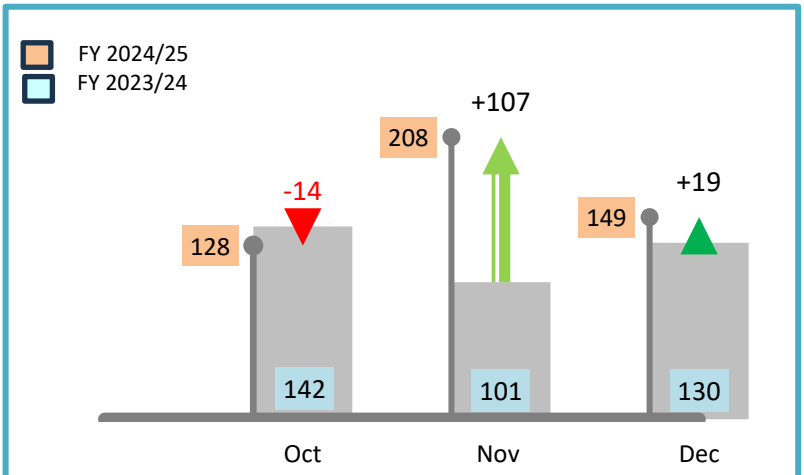


Figure 1: Renewed vessel licence issued, Q3 2023/24 VS

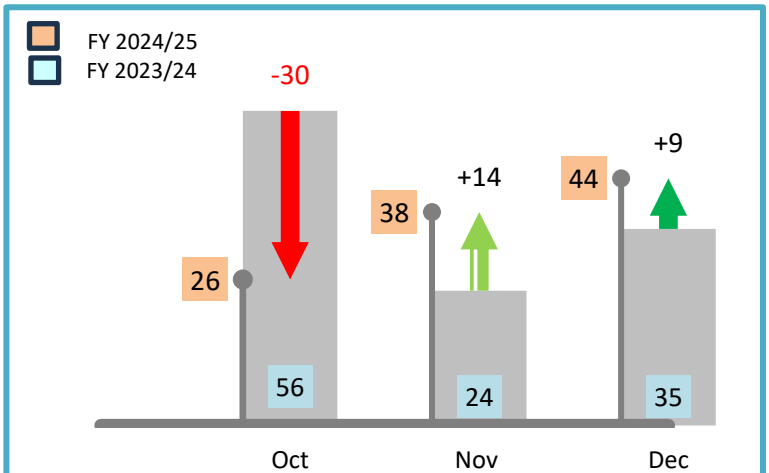


Figure 2: New vessel licence issued, Q3 2023/24 VS 2024/25

Figure 2 indicates a 115% decrease in new vessel licences issued in October 2024/25 compared to October 2023/24 (from 56 to 26). In November 2024/25, there was a 58% increase (from 24 to 38) compared to the previous year. Conversely, December 2024/25 saw a 26% increase in new licences issued, rising from 35 to 44. Overall, Q3 2024/25 experienced a decline compared to Q2 2024/25 and YoY Q3 2023/24, of 1% and 6% respectively.

In Q3 2024/25, renewed vessel licenses showed mixed results in Figure 1: October saw a 10% decrease (142 to 128), and November recorded a significant increase of 106% (101 to 208) compared to the previous year. Additionally, December experienced a 15% increase (130 to 149) year-over-year. Overall, Q3 2024/25 recorded a 30% increase compared to Q2 2024/25 and YoY Q3 2023/24.

Photo 6: L-R: Mrs. Anginette Murray (Statistician & Data Manager) demonstrates the fish measurement process to Mrs. Rose-Ann Foster (Data Collection Officer) in Lances Bay, Hanover.

	OCTOBER	NOVEMBER	DECEMBER	TOTAL
ARTISANAL	143	173	173	**489**
INDUSTRIAL	4	6	6	**16**
RECREATIONAL	4	6	5	**15**
*CAY	0	0	0	**0**
SPORTS CHARTER	5	0	5	**10**
TEMP VESSEL CER	0	0	0	**0**
CONCH	0	0	0	**0**
TOTAL	**156**	**185**	**189**	**530**

Table 1: NUMBER OF BOAT LICENCES ISSUED BY CATEGORY, OCTOBER TO DECEMBER 2024.

* Cay Licences are issued at the start of the year.

The "Artisanal" category accounts for the vast majority of Licences issued each month, with a total of 489 (92%) 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. December recorded the highest number of licences, followed by November, and then October.

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 2024 performance recording an overall 6% increase in vessel licence issued YoY.

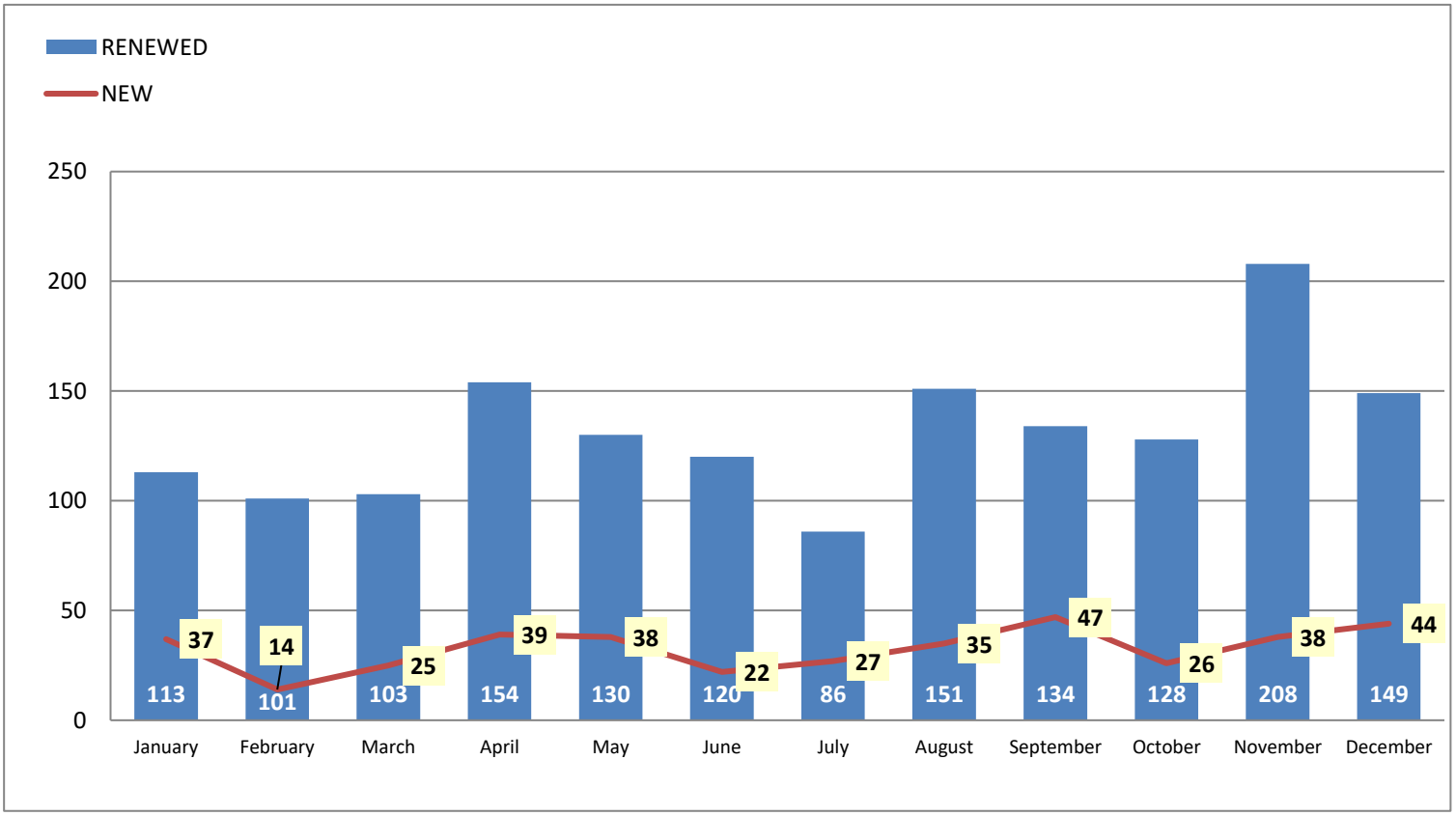


Figure 3: Vessel license issued per month in 2024.

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.

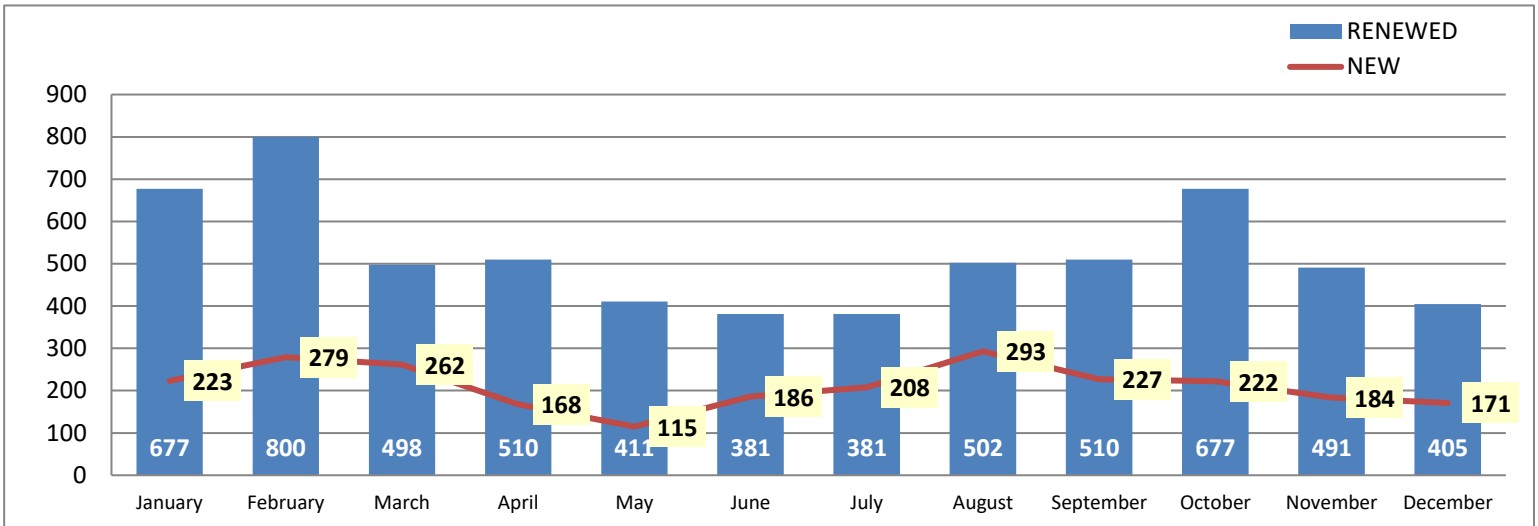


Figure 4: The graph represents the number of Fisher licences issued in 2024.

A total of 2150 licences were issued to individual fishers in Q3 2024/25. The graph in Figure 4 depicts the number of fishing licences issued in 2024, categorized by "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 677 by October. 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	59%
	Average: 30%

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

Table 2 presents data on the percentage of fisher and vessel licences renewed compared to the previous year from 2017 to 2024. The renewal rate shows a general upward trend, starting at 17% in 2017 and increasing to 59% in 2024. Notably, there are more significant increases in renewal percentages from 2019 (19%) to 2020 (26%) and from 2022 (30%) to 2023 (38%). The average renewal rate over these years is 30%. This upward trend indicates a growing retention of licence holders over the period, with the most substantial increase occurring in 2024. The rise in renewal rates is also attributed to enhanced compliance activities aimed at encouraging licence renewal and ensuring adherence to the Fisheries Act.

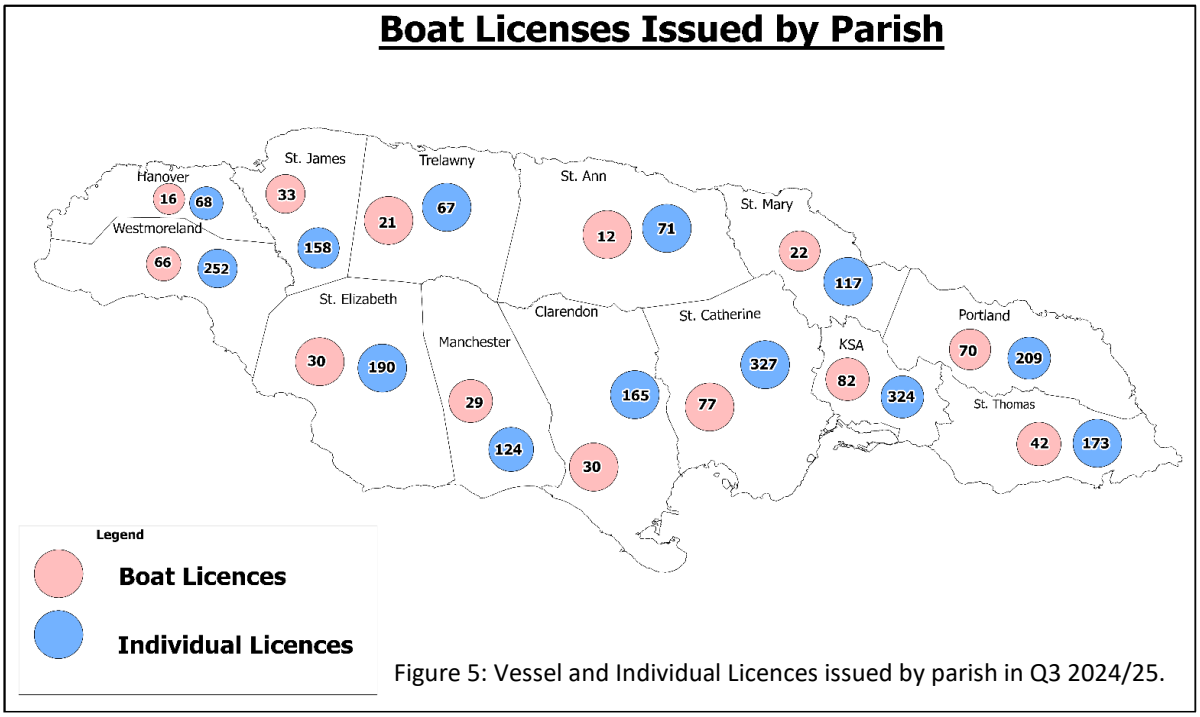


Figure 5: Vessel and Individual Licences issued by parish in Q3 2024/25.

Compliance

Jamaica's fishing sector works towards strengthening compliance with regulations. While challenges such as operating without licences, using restricted gear, and surpassing catch limits have been observed, efforts are ongoing to promote sustainable practices and fair competition. Additionally, some fishers tend to underreport their catches, which can make it more difficult to accurately assess fish stocks and effectively enforce 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, and increasing patrol efforts through the NFA Compliance Unit. The Authority has also introduced penalties for violations to deter non-compliance, through the passage of The Fisheries Act, 2018.

These efforts have yielded positive results, evidenced by a 59% 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 aquatic resources.

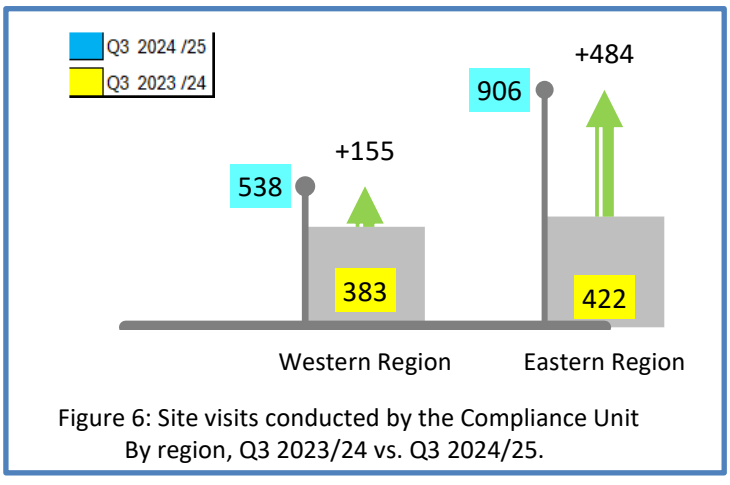


Figure 6: Site visits conducted by the Compliance Unit By region, Q3 2023/24 vs. Q3 2024/25.

Photo 7: NFA's CEO Dr. Gavin Bellamy, among the audience at a Blue Justice Initiative meeting held in Kingston, Jamaica.

The graph (Figure 6) compares the number of site visits conducted by the Compliance Unit in Jamaica during the third quarter of 2023/24 and 2024/25, separated by region (Western and Eastern). Overall, there was a 79% increase in site visits by the compliance team, 805 in Q3 2023/24 compared to 1,444 in Q3 2024/25. When combining both regions, there were 639 more site visits executed in Q3 2024/25 compared to Q3 2023/24. This suggests an overall YoY increase in compliance activity by the Compliance Unit.

Photo 8: Norway's State Secretary for International Development Bjørg Sandkjær officially handed over the sign to NFA's CEO Dr. Gavin Bellamy acknowledging the Authority's coordinating role in the Blue Justice Caribbean Hub.

Photo 9: JDF Coast Guard conducting inspection activities at sea with a local fisher.

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 and its 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	$2,320,000	$20,249,700

Table 3 displays the data on fines collected from breaches of the Fisheries Act from 2019 to 2024. The total amount collected over these years is $20,249,700. The highest annual collection was in 2022, with $9,156,000, indicating a significant increase from 2021's $1,145,000. For the year 2024, $2,320,000 was collected in fines, representing 11% of the 6-year total of $20,249,700.

NFA In-field Activities

Photo 10: Statistician & Data Manager Mrs Anginette Murray engages local Fishers from Lances Bay on the importance of providing Data to NFA Officers.

Photo 11: NFA'S CEO Dr. Gavin Bellamy presents pelagic fishing certifications to fishers in Pagee, St. Mary.

Photo 12: NFA's Alex Clarke being interviewed by Power 106FM at the 4-H Club Stew Festival & Farmers' Market event in St. Catherine.

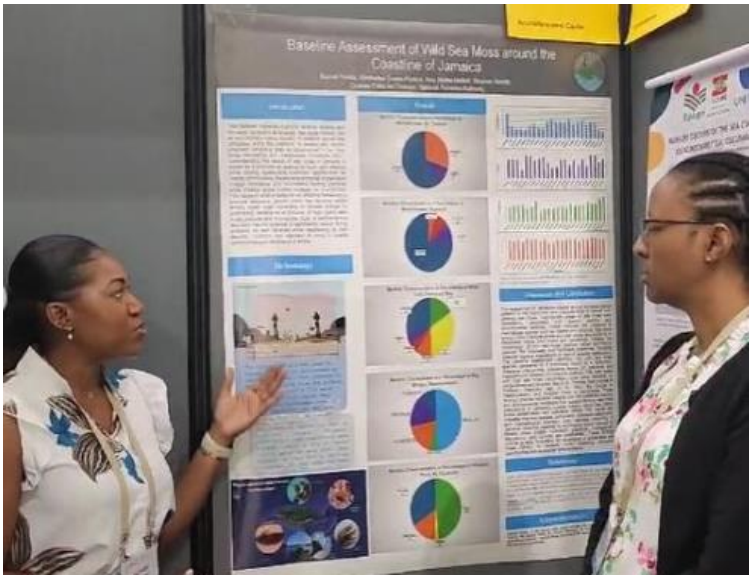


Photo 13: NFA's Rachel Feddis in discussions with attendees at The World Aquaculture Society Conference of the Latin America and Caribbean Chapter' in Medellin, Colombia.

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 in accordance with the 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 375 species of fish being caught, compared to 340 species over the previous quarter (Q2 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 Q3 2024/25.

Table 4 shows the common fish varieties caught per parish in Jamaica during the third 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**	
October	1,358.96		3rd Quarter FY24/25	3,089,997,737.25		3rd Quarter FY24/25	19,681,514.25		3rd Quarter FY24/25
November	1,374.56			3,125,470,482.10			19,907,455.30		
December	1,243.76	**3,977.28**		2,828,047,276.86	**9,043,515,496.21**		18,013,039.98	**57,602,009.53**	
TOTAL	**13,742.08**	**13,742.08**		**31,159,201,825.86**	**31,159,201,825.86**		**199,023,069.08**	**199,023,069.08**	

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

Table 5 shows an increase in both the weight of fish caught and the estimated value of those catches throughout 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 2024 shows a total marine finfish production weight of 13,742.09 metric tons. The estimated value of this production is approximately JMD31B, translating to around USD 199M. The data suggests significant production in certain months, with September standing out, indicating a peak production period that contributed substantially to the annual total. For October – December 2024, marine finfish production was 3,977.28 MT (Table 5), which yields an approximate value of USD 57 Mil or JMD$9.04 billion (Table 5).

Photo 14: NFA CEO Dr. Gavin Bellamy visited the Pagee Beach Fishing Village, engaging in meaningful discussions with local fishers about the industry's challenges and opportunities.

Fishery	2024												Total	% Composition
	January	February	March	April	May	June	July	August	September	October	November	December		
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	1,358.96	1,374.56	1,243.78	**13,742.10**	96.16
Sea Cucumber	8.28	0	0	0	0	0	0	0	0	0	0	0	**8.28**	0.06
Industrial Conch			42.56	79.1	136.62	28.38	31.59						**318.25**	2.23
Industrial Spiny Lobster*	8.57	0.91	37.51				2.67	21.51	2.74	77.62	39.16	31.96	**222.65**	1.56
Total Marine Production	**1175.78**	**588.79**	**995.77**	**1361.81**	**975.95**	**1249.73**	**757.54**	**1113.99**	**1945.88**	**1436.58**	**1413.72**	**1275.74**	**14,291.28**	**100**

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

Close Season

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

In 2024, Jamaica's marine fish production demonstrated varied performance throughout the year, reflecting the dynamics of both artisanal and commercial fisheries. January recorded 1,175.78 MT, but production fluctuated in subsequent months. February experienced a sharp decline to 588.79 MT, representing a decrease of approximately 50%. March rebounded with a production of 995.77 MT, marking a 69% increase from February. As the year progressed, April's production increased to 1,361.81 MT, a 37% increase from March, while May and June continued the trend of variability. The quarterly performance highlighted this inconsistency, with the first quarter totalling 2,760.34 MT and the second quarter exhibiting a higher production due to fluctuations in environmental conditions and fishing activities.

Artisanal fishers played a significant role in this year's performance, contributing a considerable portion of the total catch. The close season implemented for certain species aim to protect breeding populations and enhance sustainability.

Upon the season's opening, there was a marked increase in production, particularly for species like conch, where catches surged as fishers capitalized on the opportunity. Overall, the year highlighted the importance of monitoring both production trends and the ecological impact of fishing practices to ensure the long-term health of Jamaica's marine resources.

The cause of the 8% increase in Q3 marine fish production compared to Q2 remains undetermined. Nevertheless, the Authority has initiated a deep dive analysis to explore potential factors that may have contributed to this rise. This investigation aims to enhance understanding and inform future strategies within the fisheries sector. For 2024, artisanal finfish production totaled **13,742.10 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 **42.56 MT** in March to **31.59 MT** in July, peaking at **136.62 MT** in May. The total production of marine resources in 2024 was **14,291.28 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)													%
	January	February	March	April	May	June	July	August	September	October	November	December	Total	Contribution
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	$19,681,514	$19,907,455	$18,013,040	$ 199,023,069	98.10
Industrial Conch			$ 276,647	$ 514,140	$ 888,050	$ 184,496	$ 205,353						$ 2,068,686	1.02
Industrial Spiny Lobster*	$ 68,583	$ 7,257	$ 300,043				$ 21,348	$ 172,100	$ 21,936	$ 620,979	$ 313,262	$ 255,714	$ 1,781,223	0.88
Total Marine Production	**$ 16,853,065**	**$ 8,521,371**	**$13,838,535**	**$19,091,295**	**$13,043,848**	**$17,872,991**	**$10,701,777**	**$15,994,204**	**$28,163,927**	**$20,302,493**	**$20,220,717**	**$18,268,754**	**$ 202,872,978**	100.00

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

Biological Data for Marine Species

Lobster

2024		Carapace Length (cm) Average	Tail Length (cm) Average	Telson Length (cm) Average	Body Depth Length (cm) Avg	Whole Weight (g) Average	Tail Weight (g) Average
Sample	1383						
male	576	7.07	20	6.16	5.21	639.18	261.87
female	481	6.69	20.33	6.23	4.88	558.18	229.57
Tar	127	6.08	10.85	3.63	4.42	620.31	
Scratched	198	5.41	9.51	3.29	3.82	633.83	

Table 8: BIOLOGICAL SAMPLING OF SPINY LOBSTER 2024 SUMMARY.

Photo 15: Measuring a Caribbean spiny lobster in the Caribbean. *Image credit: NPS*.

The 2024 lobster biological data measurements indicate notable differences between genders. Males show an average carapace length of 7.07 cm, while females average 6.69 cm. Similarly, the average tail length for males is 20 cm, compared to 20.33 cm for females. Whole weight also reflects these differences, with males averaging 639.18 g and females 558.18 g. The measurements for the "Tar" group average 6.08 cm for carapace length and 620.31 g for whole weight, indicating smaller sizes compared to both genders.

The t-test was performed to compare the size of male and female lobsters, focusing on carapace length and tail length. Males have an average carapace length of 7.07 cm, while females average 6.69 cm. For tail lengths, males average 20 cm, and females average 20.33 cm. The results showed that the difference in carapace length is significant, meaning that male lobsters are noticeably larger than females. This larger size can help males be more successful in mating, which is important for producing healthy offspring. In contrast, the difference in tail length may not be significant, as it might not affect their reproductive success as much. Overall, understanding these size differences helps in managing lobster populations better, ensuring that there are enough mature males for mating, which supports a healthier and more sustainable lobster population.

A total sample size of 2,765 lobsters, consisting of 576 males and 806 females, the male-to-female ratio is approximately 1:1.4. This indicates that for every male lobster caught, there are about 1.4 female lobsters. Consequently, the likelihood of randomly catching a female lobster is around 58.2%, while the probability of catching a male lobster is approximately 20.8%. This relatively balanced ratio suggests a healthier population structure, which can positively influence mating dynamics and reproductive success within the species. Understanding this ratio is vital for effective management strategies aimed at sustaining lobster populations.

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 male-to-female ratio in conch samples over the four years reveals significant trends in population demographics. In 2021, males comprised 37% of the total samples, while females accounted for a dominant 61%. This trend shifted slightly in 2022, with males increasing to 41%, indicating a potential adjustment in the population structure. However, in 2023, the male percentage had a marginal increase to 42%, with females at 55%. By 2024, the ratio remained similar, with males at 43% and females at 57%. This consistent predominance of females suggests an imbalance that could impact reproductive dynamics, necessitating management strategies to ensure a sustainable population.

The average weight data offers critical insights into the health of the conch population over the years. The "Avg Weight - 50%" indicates a decline from 223.89 g in 2021 to 130.99 g in 2024, suggesting that conchs are either growing at a slower rate or that there is a higher population density of juveniles impacting overall averages. Additionally, the "Avg Weight - Dirty" reflects a similar downward trajectory, decreasing from 142.60 g in 2022 to 135 g in 2024. This decreasing trend in both weight metrics raises concerns about the underlying factors affecting the growth and health of the conch populations, which may be linked to environmental stressors or changes in migration patterns. The persistent predominance of females, coupled with declining weights, highlights potential risks to reproductive success and overall population viability. It emphasizes the necessity for ongoing monitoring and further research into the factors contributing to this decline, ensuring that the population remains sustainable in the long term.

Aquaculture Production

In 2024, the Aquaculture sector had an average production area of approximately 653 acres. The total number of registered fish farms stood at 114, including hatchery and Production. Aquaculture Production was 659.25 MT in 2024; with 3rd Quarter (October – December) recording 130MT of food fish production.

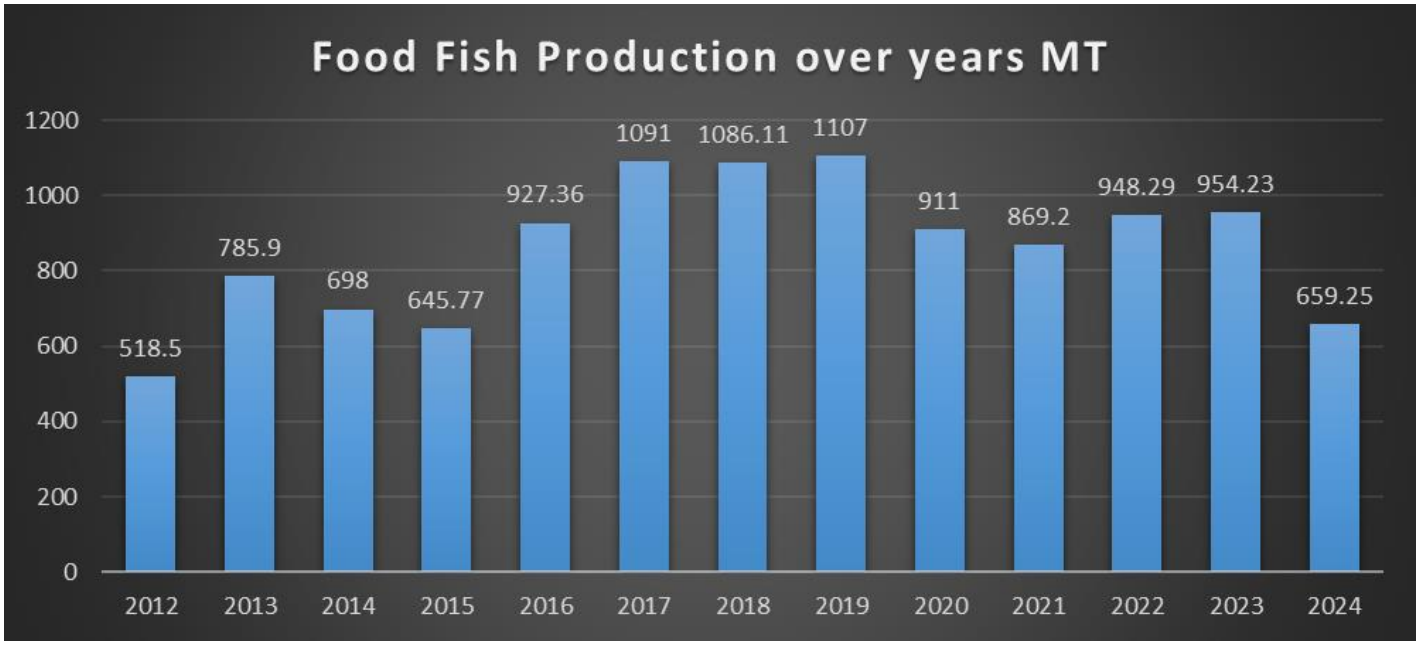


Figure 8: Aquaculture production in MT from 2012 to 2024.

Photo 17: Children look on with curiosity at an aquarium within NFA's Aquaculture Boothe at Hanover Agriculture Show.

Photo 18 (L-R): Minister of Agriculture, Fisheries & Minning Hon. Floyd Green in discussion with NFA's Aquaculture Officer Mr Alex Clarke at an agriculture show in Hanover.

Figure 8 shows trends in food fish production from 2012 to 2024. In 2024, 659.25MT of food fish were farmed, with an estimated value of USD 4.5M or JMD 712 M. Despite the reduced overall production volume for 2024, there was a 25% increase in tilapia production in Q3 2024/25 YoY. Over 1 million aquaculture seed stock were produced in 2024, with 121,208 produced in Q3 2024/25 representing 12% of the 2024 total. The overall trend shows initial growth and stabilization of food fish production, followed by periods of decline and modest recovery.

In comparing aquaculture production performance between 2024 and 2023, YoY. There has been a decline, with 2024 recording approximately 659.75 MT compared to 954.23 MT in 2023. This decrease of nearly 31% raises concerns about the state of the sector. Significant factors contributing to this decline include farmers inadequately feeding their fish ponds, which has adversely affected growth rates, as well as the exit of a major fish farmer in St. Elizabeth. In response, the National Fisheries Authority Aquaculture Division will be increasing its sensitization campaign to educate fish farmers on the importance of adequately feeding their fish ponds and the economic benefits of improving this practice.

Photo 19: Local fish farmers feeding their ponds.

2024	Total Acres	Current Acres in 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
Oct. – Dec.	750	597.01	80%	130

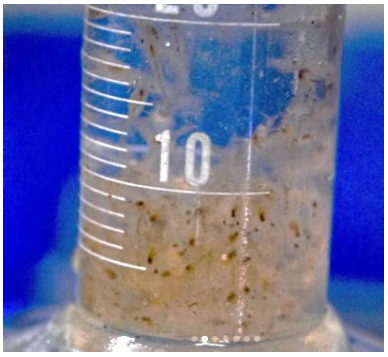
Table 10: AQUACULTURE TOTAL PRODUCTION ACREAGE AND HARVEST TOTAL FOR 2024.

In 2024, Jamaica's aquaculture sector demonstrated a nuanced performance characterized by a correlation between total production and the acreage in use. The total acres in production for the year averaged around 837.87, with varying levels of production throughout the quarters. For instance, during the January to March period, production reached 716.61 MT, reflecting an impressive 85% of the total acres utilized. However, as the year progressed, this percentage fluctuated, with the April to June quarter showing a decline to 71%, resulting in a total production of 599.61 MT. This correlation indicates that while the acreage is a critical factor, other variables also significantly impact overall production levels.

Total harvest for 2024 saw fluctuations with a reported total of 179 MT in the first quarter, decreasing to 173.3 MT in the second quarter, which represents a decline of approximately 3.7%. The third quarter experienced a further dip, with production at 593.46 MT, accounting for 82% of the acres in use. By the final quarter, total production slightly improved to 597.01 MT, leading to an overall total harvest of 130 MT. These variations in total harvest reflect the complexities within the sector, emphasizing the need for improved practices to enhance productivity and optimize the use of available acreage.

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.



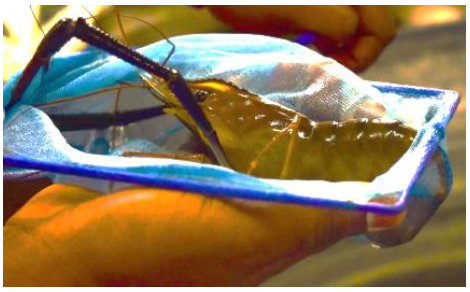


Photo 20: NFA has successfully produced its first batch of post-larval freshwater prawns from its in-house hatchery at the Twickenham Park Complex.

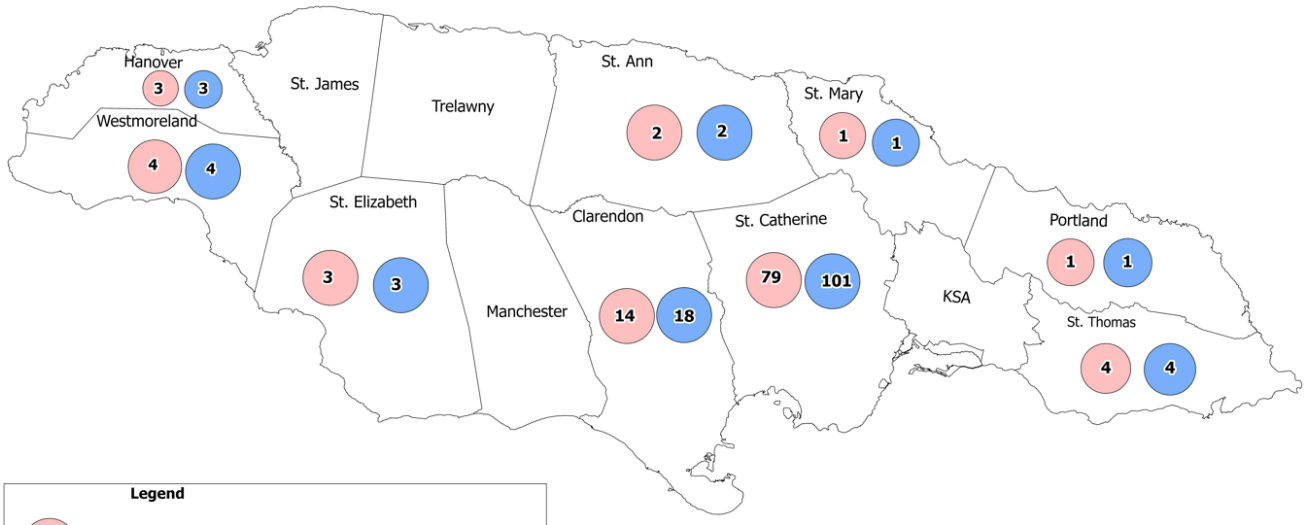


Figure 9: Number of aquaculture farms and registered fish farm workers by parish, in 2024.

ECONOMIC PERFORMANCE OVERVIEW

Socio-Economic Status

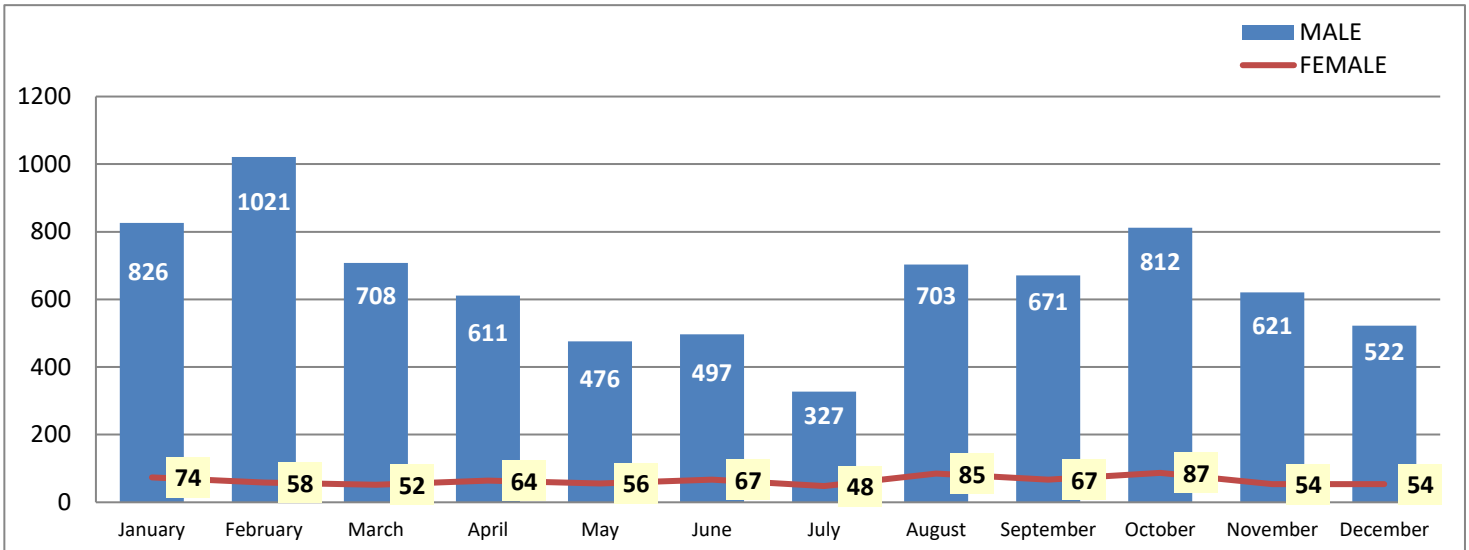


Figure 10: GENDER OF FISHERS RECEIVING LICENCES IN 2024.

The graph illustrates the distribution of male and female fishers receiving licenses throughout 2024, highlighting notable trends in the male-to-female ratio. In January, there were 826 males and 74 females, resulting in a significant male predominance. February saw a peak in licenses, with a total of 1,021 males and 119 females, reflecting a growing trend in male participation. However, as the year progressed, the numbers fluctuated, with notable declines in female participation in July (48), despite a slight recovery in subsequent months. By December, the male count was 522, while the female count dropped to 54, indicating a consistent disparity in licensing trends.

Throughout the year, the total number of licenses issued reveals a stark contrast between male and female fishers. By the end of December, the cumulative totals show 7,795 males and 766 females, resulting in a male-to-female ratio of approximately 10.18:1, indicating that there are about 10 males for every female licensed fisher. This disparity highlights the challenges faced in achieving gender balance within the fishing industry, as females consistently represent a smaller percentage of licensed fishers. The fluctuations in monthly data suggest that while male participation remains robust, efforts may be needed to encourage and support female fishers to ensure a more equitable representation in the sector moving forward.

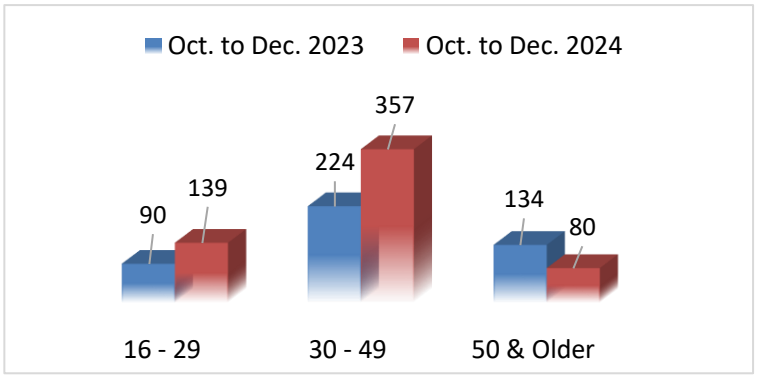


Figure 11: AGE OF NEW FISHERS APPLICATION Q3 2023/24 vs Q3 2024/25.

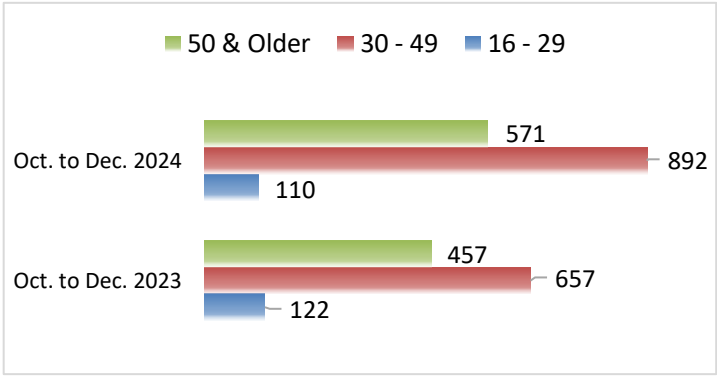


Figure 12: AGE OF RENEWAL FISHERS APPLICATION Q3 2023/24 vs Q3 2024/25.

The analysis of the two graphs comparing new and renewed fishers from October to December 2023 and 2024 reveals significant shifts in age group distributions. For new licenses, the 16-29 age group saw an increase from 90 in 2023 to 139 in 2024, reflecting a growth of approximately 54.4%. The 30-49 age group also experienced a rise, increasing from 224 to 357, which represents an increase of about 59.3%. However, the 50+ age group faced a decline, dropping from 134 in 2023 to 80 in 2024, indicating a decrease of around 40.3%. These trends suggest a rising interest among younger and middle-aged fishers, while the decline in the older demographic may require targeted engagement strategies to retain this age group cohort.

In contrast, the renewed licenses reveal varied trends across age groups. The 16-29 age group experienced a decline of approximately 9.8%, dropping from 122 in 2023 to 110 in 2024. However, the 30-49 age group saw significant growth, increasing by about 35.7%, from 657 to 892. Additionally, the 50+ age group also experienced an increase of approximately 24.9%, rising from 457 in 2023 to 571 in 2024. These trends highlight the need for targeted efforts to boost renewal rates among younger fishers while demonstrating that the older and middle-aged fishers are renewing their licences, suggesting that strategies to engage and support these groups are effective.

Photo 21: A female fisher proudly displaying her catch.
Source: Cherehani.

Photo 22: Female fisher throwing her net in Bluefields, Westmoreland.
Source: Martin.

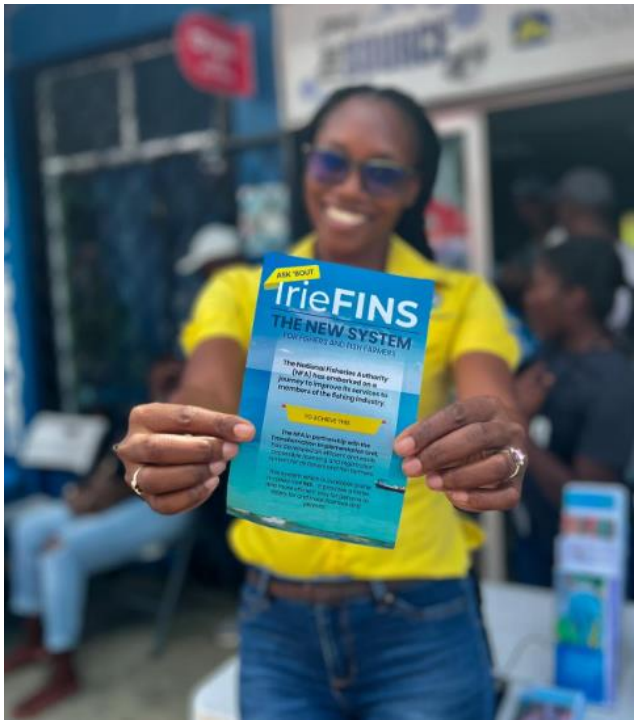


Photo 23: NFA's Director of Strategic Planning, Performance Monitoring, and Evaluation, Ms. Annakay Crawford, presents one of the Iriefins posters currently in circulation.

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 continues to grow at a stable rate, as reflected in 2024. 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	2024
	15,650.65	15,810.81	13,880.88	14,670.67	17,100.04	19,420.00	20,586.00
Agriculture, Forestry & Fishing	1,014.84	1,018.94	1,004.30	1,087.60	1,185.94	1,117.90	1,752.70
Fishing	94.58	111.02	109.04	90.16	116.29	209.68	207.53
% Contribution of fishing to Agriculture	9.32%	10.90%	10.86%	8.29%	9.81%	18.76%	11.84%
% Contribution of fishing to total GDP	0.60%	0.70%	0.79%	0.61%	0.68%	1.08%	1.01%

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

The table detailing GDP contributions indicates a notable decline in the fishery sector's contribution to agriculture and Jamaica's overall GDP between 2023 and 2024. In 2023, the fishing sector contributed approximately $209.68 million, which represented about 18.7% of agricultural contributions and 1.08% of total GDP. However, by 2024, this contribution dropped to $207.53 million, reflecting a decrease in percentage contribution to agriculture to approximately 11.8% and a minimal percentage decline of 0.06% for total GDP. This decline can be attributed to the adverse effects of Hurricane Beryl, which impacted the south coast, the highest marine production belt in Jamaica, resulting in reduced fishery outputs and overall fishery sector performance.

This decline in the fishery sector's contribution underscores the vulnerability of Jamaica's agricultural economy to natural disasters, particularly in regions critical for marine production. The consistent percentage of total GDP suggests that while the absolute contribution has seen a slight decline, the overall economic impact relative to GDP remains stable. Continued monitoring and strategic planning will be essential to mitigate the effects of such natural disasters in the future and to enhance the resilience of the fishery sector within Jamaica's broader agricultural framework. Addressing these challenges will be crucial for sustaining the fishery sector's contribution to both agriculture and the national economy.

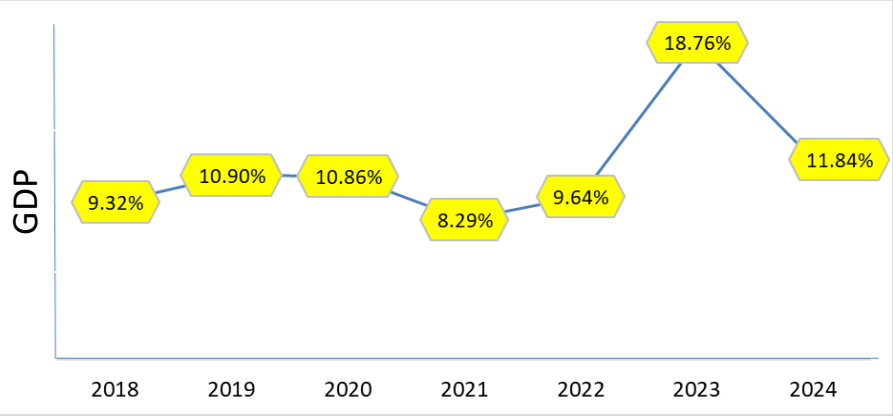


Figure 13: THE PERCENTAGE CONTRIBUTION OF FISHING TO THE AGRICULTURE SECTOR FROM 2018 TO 2024.

In monetary terms, using an exchange rate of USD 1 to JMD 155.65, the fishery sector's contribution in 2023 translates to approximately 33.12 billion JMD, while the 2024 contribution equates to around 32.80 billion JMD. This slight decrease in monetary value, despite the stable percentage of total GDP, underscores the importance of the fishing sector within Jamaica's economy. Continued investment and support for recovery initiatives will be necessary to restore the fishing sector's output and enhance its contribution to both agriculture and the national economy.

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	WENCHMAN	KING FISH
St. Ann	$1,000	$1,100	$950	$850	$950	$850	$1,000	$950	
St. Mary	$1,000	$1,100	$900	$950	$900		$950	$900	
St. James	$1,150	$1,000	$950	$1,000	$900	$900	$1,000	$1,000	$900
Portland	$1,100	$1,200	$900	$950	$850	$950	$1,100		$1,000
Trelawny	$1,100	$1,150	$900	$900	$900	$1,000		$950	$950
Westmoreland	$1,000	$1,000	$950	$850	$900	$900	$1,000	$950	$900
St. Elizabeth	$1,000	$1,000	$950	$900	$800	$950			$950
St. Catherine	$1,200	$1,200	$1,000	$900	$900	$950		$950	$1,000
Kingston	$1,200	$1,200	$950	$950	$850	$900			$950
Hanover	$1,000	$1,000	$950	$900	$850	$950	$1,200	$1,000	$950
St. Thomas	$950	$950	$950	$900	$850	$950		$900	$1,000
AVERAGE	**$1,064**	**$1,082**	**$941**	**$914**	**$877**	**$930**	**$1,042**	**$950**	**$956**

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

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

The analysis of average fish prices across various parishes in Jamaica during the period from October to December 2024 reveals notable disparities in pricing. St. Thomas recorded the lowest average price at $931, making it the most affordable location for consumers. In contrast, Portland exhibited the highest average price at $1,014, highlighting a 9% difference compared to St. Thomas. Other parishes, such as Hanover and Kingston, also reflected higher prices, averaging around $1,000, while Westmoreland and St. Elizabeth maintained prices closer to the average, at $939 and $936, respectively. This range showcases the variability in fish prices influenced by local supply, demand, and regional fishing conditions.

Overall, the average fish price across all parishes was approximately $1,000. The price variations indicate that while some areas offer more affordable fish options, others may impose higher costs due to factors such as availability and transportation expenses. The significant price difference between the cheapest and most expensive parishes underscores the need for consumers to consider purchasing fish in bulk to afford them an opportunity to negotiate a bulk price.

Understanding these dynamics can help inform purchasing decisions and highlight the economic factors affecting fish prices in Jamaica. Snapper and Parrot fish were the most expensive fish across all parishes, with prices ranging from $950 to $1,200. Grunt 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.

Regarding specific fish species, the snapper fish in Kingston and St. Catherine is priced at $1,200, making it less affordable compared to other options, particularly since St. Thomas offers it for $950, which is the cheapest location for both parrot fish and snapper. Meanwhile, the parrot fish in Portland, Kingston and St. Catherine costs $1,200, positioning it as one of the more expensive choices. Other species, such as the jack fish, are on average around $950, which is competitive in pricing. The grunt fish has the lowest average price at $877, making it the cheapest option overall, which represents a price difference of approximately 37% when compared to the parrot and snapper fish. The parrot fish at $1,082, snapper at $1,064, and tuna at $1,042 record the highest average prices. This pricing analysis highlights the diversity in fish species availability and their associated costs, emphasizing the economic factors influencing consumer choices in the Jamaican fish market.

Photo 24: Local fish vendor displaying her fish variety for sale to prospective buyers at the Rae Town Fishing Village.
Source: Jamaica Gleaner

CONCLUSION

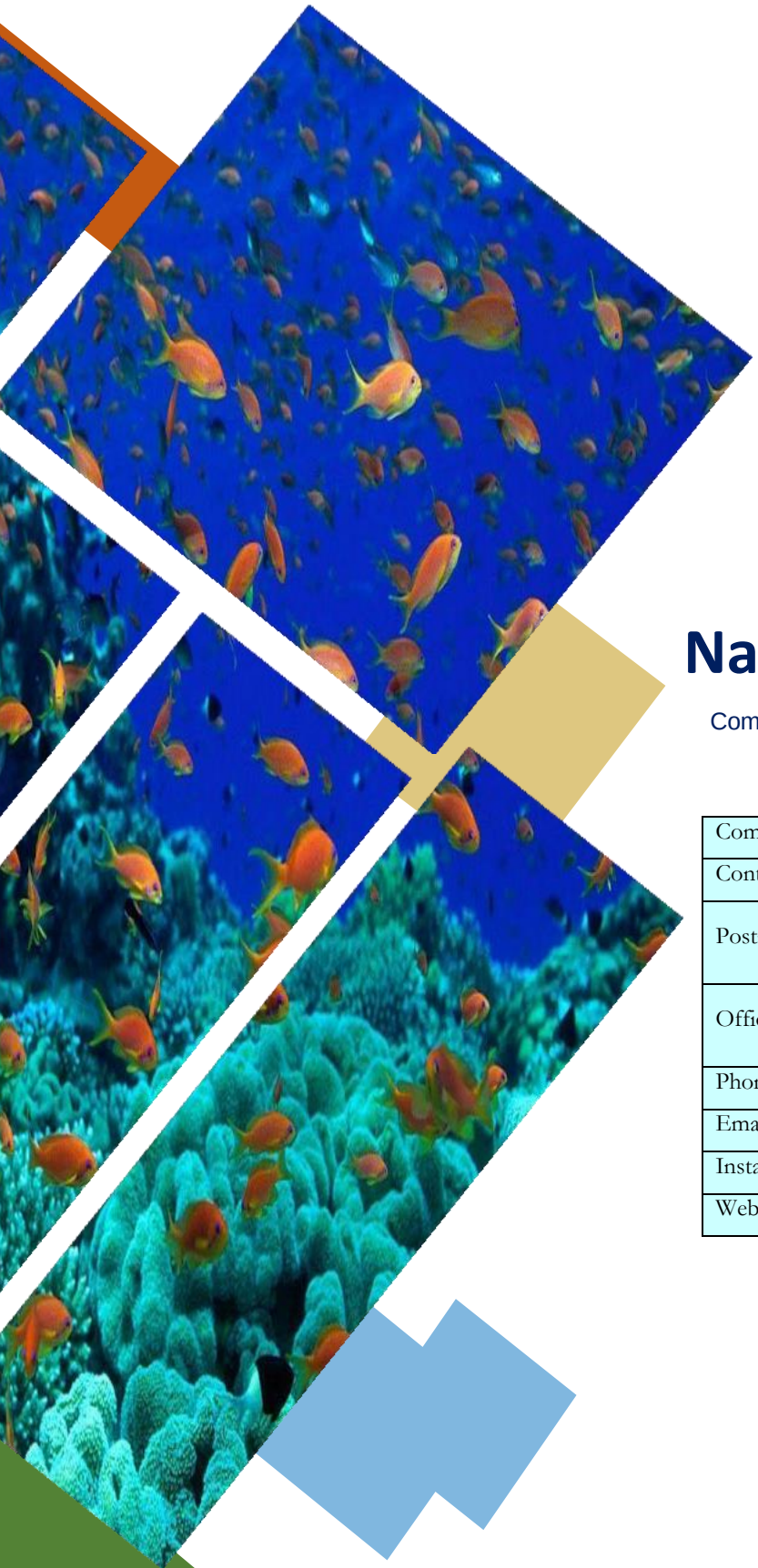
In conclusion, the Jamaican fisheries sector has demonstrated significant achievements and resilience over the past year, reflecting the National Fisheries Authority's (NFA) commitment to sustainable development. The sector has seen a substantial contribution to Jamaica's economy, with marine production earnings reaching USD 203 million in 2024. This underscores the sector's importance as a major foreign exchange earner and its role in ensuring food security and socio-economic stability, particularly in coastal communities.

The report highlights notable improvements in licensing activities. There was a 54% increase in new licence applications among the 16-29 age group, indicating a growing interest from younger individuals in the fisheries sector. Additionally, license renewals rose by 36% in the 30-49 age group, suggesting increased engagement and compliance within the sector. The artisanal fishing category remains dominant, accounting for a significant 92% of licences issued, which emphasizes its critical role in supporting local economies and food security.

The aquaculture sector has experienced a decline in overall production for 2024, yet it holds significant potential for future growth. Despite the reduced production, the sector saw a 25% increase in tilapia production in Q3 2024/25 year-over-year. To harness this potential, the NFA's Aquaculture Division has expanded its technical team to enhance sensitization, training, and research activities. These efforts aim to bolster the sector's development and contribute to Jamaica’s economic diversification.

Overall, the Jamaican fisheries sector has made impressive strides, with a 30% increase in vessel licences being renewed year-over-year. The NFA's efforts to enhance compliance and data collection, alongside a robust focus on sustainable practices, have been pivotal in these achievements. As the sector continues to evolve, ongoing investments and strategic initiatives will be essential to ensure its sustainability and continued contribution to Jamaica's economy.

As we look ahead, the continued collaboration between the NFA and various stakeholders will be essential in overcoming the challenges that lie ahead. By fostering partnerships and promoting participatory governance, we can collectively enhance the sustainability and profitability of the fisheries sector. Together, we can ensure that Jamaica's rich marine resources are preserved for future generations while supporting the livelihoods of those who depend on them.



National Fisheries Authority

Comments and enquiries should be directed to:

Compiled by:	Statistics and Data Management Unit
Contact person:	Dr Zahra H. Oliphant, JP. Phd.
Postal address:	PO Box 470 Kingston 13, Jamaica
Office address:	2C Newport East, Kingston 11, Jamaica
Phone enquires:	(876) 948-9014, (876) 948-6933, (876) 967-2081
Email:	statistics@nfa.gov.jm
Instagram:	@nfajamaica
Website:	fisheries.gov.jm

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