National Fisheries Authority

JAMAICA FISHERIES:

Quarterly Statistics Report

Volume 4: Issue 2

JULY – SEPTEMBER 2025

Our Vision

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

Our 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.

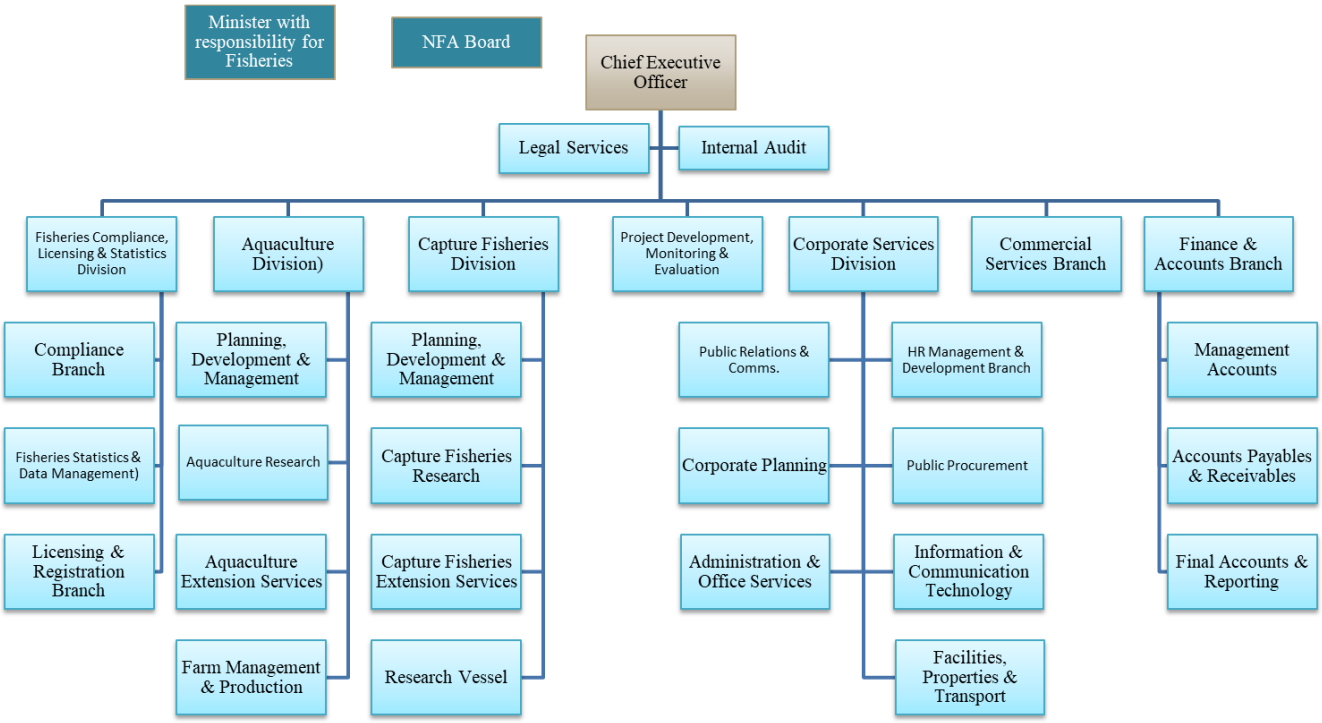

Photo 1: Picture of the *Crassostrea virginica* (Eastern Oyster) cultivated by Western Supreme Oysters and More in Russia, Savanna-La- Mar, Westmoreland.

CEO's Message

I am pleased to present to you the Jamaica Fisheries Quarterly Statistics Report Volume 4 Issue 2. As we reflect on the second quarter of the 2025/2026 fiscal year, I am filled with immense pride in the collective achievements of the National Fisheries Authority and the entire fisheries community.

This report is a testament to the resilience, dedication, and forward-thinking spirit that defines our sector. The sustained growth in licensing, including a 10% year-over-year increase in total fishers to 2,092, and the enhanced compliance measures are not just statistics; they represent a stronger, more accountable, and more sustainable fisheries industry for Jamaica.

I extend my heartfelt gratitude to our dedicated staff, our government partners, and, most importantly, our fishers (Artisanal and Industrial), who are the backbone of this industry. Your commitment to sustainable practices and your willingness to embrace new technologies like the IrieFins platform are paving the way for a brighter future. The NFA remains steadfast in its mission to facilitate the sustainable development of our fisheries, and with your continued support, I am confident that we will achieve our vision of becoming a model of excellence in fisheries management. Let us continue to work together to ensure that our marine resources are managed wisely for the benefit of all Jamaicans.

Dr Gavin Bellamy JP
Chief Executive Officer

Principal Director's Message

The second quarter of 2025/2026 has been exceptionally productive for the units under my purview, and I am delighted to share the highlights of our collective efforts.

The issuance of 609 new and 1,483 renewed fisher licences, alongside a 4.6% increase in vessel renewals, is a direct result of the hard work of our licensing team and the success of our in-field sessions and online platform. These numbers reflect a growing trust in our systems and a shared commitment to a well-regulated fishery.

Our Compliance Unit has been equally diligent, conducting 2,314 site visits—a remarkable 86% increase from the previous year—and expanding our joint operational patrols by 85%. This heightened presence is crucial for safeguarding our valuable marine resources. Furthermore, the wealth of data our statistics and data management team has collected on key species like lobster and conch is the bedrock of our scientific approach to fisheries management. I am incredibly proud of my teams for their dedication and professionalism. Their work is fundamental to ensuring that our fisheries are not only productive but also sustainable for the long term. We will continue to innovate and collaborate to build on this success in the quarters to come.

Dr Zahra Oliphant (PhD, JP)
Principal Director

Photo 2: Dr Gavin Bellamy (center), CEO of the National Fisheries Authority, assists with the offloading of fish feed as part of the Authority's Post-Hurricane Melissa recovery efforts to support local fish farmers.

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Photo 3: Dr Gavin Bellamy (Right) – NFA CEO being interviewed by TVJ's Smile Jamaica host Neville Bell.

About the NFA

The National Fisheries Authority (NFA) was established as a body corporate, pursuant to Section 5(1) of the Fisheries Act, 2018, with the mandate to manage and develop fisheries and aquaculture. The Authority is, therefore, the sole body with the responsibility of ensuring that there is conservation of Jamaica's fisheries, collection, compilation, and analysis of statistics for the sector, monitoring, control and enforcement of activities related to fisheries and aquaculture; as well as, granting of licences, authorisations and permits and allocation of fishing rights and quotas for all who intend to fish in Jamaica's waters.

Our Mandate is to be responsible for the sustainable management and development of fisheries and aquaculture in accordance with the provisions of the Fisheries Act, 2018.

Core Values

- Integrity
- Transparency
- Accountability
- Fairness
- Professionalism
- Respect

Our Goals:

- To conserve and achieve optimal production of capture fisheries resources in Jamaica's fisheries waters.
- To increase and diversify fish production through Aquaculture to increase food and nutritional security, and economic growth.
- To improve fish production and quality along our value chain to enable socio-economic benefits.
- The NFA will become a world-class, knowledge-driven and sustainable organisation.

Q2 2025/26 AT A GLANCE

2,764.37 TONNES – FINFISH
3,039.59 TONNES – ** MARINE
146.21 TONNES – AQUACULTURE

2,752 LOBSTER BIOLOGICAL SAMPLES
1,875 CONCH BIOLOGICAL SAMPLES

609 NEW FISHER LICENCE ISSUED
1,483 RENEWED FISHER LICENCE
62% FISHER LICENSE RENEWAL RATE

PRODUCTION VALUE
USD 1.3M – AQUACULTURE
USD 40M – FINFISH
USD 44.1M – ** MARINE

40 JOINT OPERATIONS (JDF&JCF)
2,314 SITE VISITS EXECUTED
41 INSPECTIONS EXECUTED
179.84 lbs PRODUCTS SEIZED

1,926 LICENCES ISSUED TO MALES
166 LICENCES ISSUED TO FEMALE

212 LANDING SITES VISITED
204 AQUACULTURE FARM VISITS
5 IN-FIELD LICENSING SESSION

3,000+ IRIEFINS USERS
4,207 INSTAGRAM FOLLOWERS
3,525 FACEBOOK FOLLOWERS
2,535 TIKTOK FOLLOWERS
136 X (Formerly Twitter)

90 NEW VESSEL LICENCE ISSUED
388 RENEWED VESSEL LICENCE

** MARINE (Incl. Lobster, Conch and Sea Cucumber)

NFA OYSTER PROJECT FIELD ACTIVITIES

REGULATORY PERFORMANCE OVERVIEW

IrieFINS

Fishing Vessels

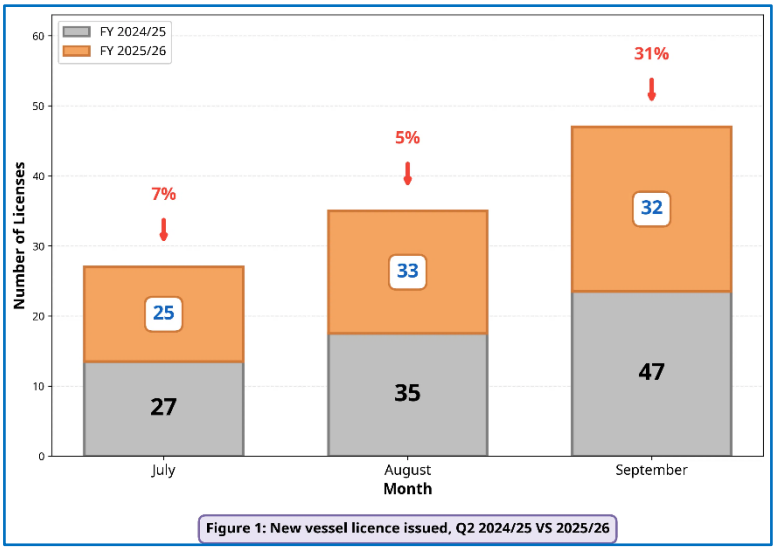


Figure 1: New vessel licence issued, Q2 2024/25 VS 2025/26

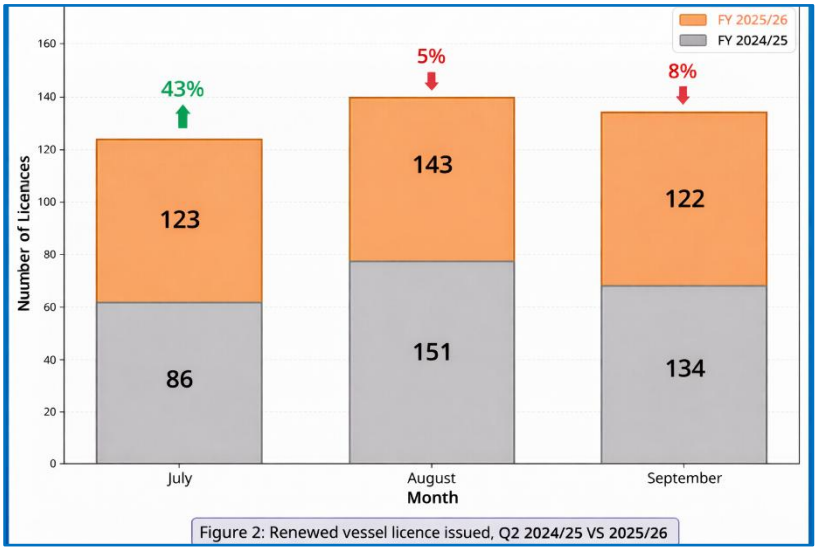


Figure 2: Renewed vessel licence issued, Q2 2024/25 VS 2025/26

The second quarter ending September 2025 reveals a mixed performance in Jamaica's vessel licensing activity compared to the same period last year, with a notable slowdown from the strong growth observed in Q1. Total licences issued in Q2 FY2025/26 (478) were nearly flat with the previous year (480), marking a slight 0.4% year-over-year decrease. This contrasts sharply with the robust 37.4% YoY growth seen in Q1. The stability in total numbers masks diverging trends: a healthy increase in renewed licences was offset by a significant drop in new licences.

New vessel licenses, a key indicator of new entrants into the fishery sector, saw a 17.4% year-over-year decline in Q2, with only 90 new licences issued compared to 109 in the same quarter of the previous year. The quarter started with a minor dip in July (-7%), followed by another small decrease in August (-6%), but concluded with a sharp 32% drop in September. This downward trend continues to suggest that this contraction in the pipeline resonates with the slow period.

In contrast, renewals demonstrated resilience, posting a 4.6% year-over-year increase for the quarter, with 388 renewals in FY2025/26 compared to 371 in the prior year. This growth was driven almost entirely by a strong performance in July, which saw a 43% surge in renewals. However, this momentum was not sustained, as August and September saw year-over-year declines of 5% and 8%, respectively. While the overall increase in renewals provides a stable base, the declining trend in the latter two months will be analyzed further.

Comparing the second quarter to the first, there was a slowdown in licensing activity. Total licences dropped by 25.1% from Q1 to Q2 of FY2025/26. This was caused by a 36.6% fall in new licences and a 21.8% decrease in renewals.

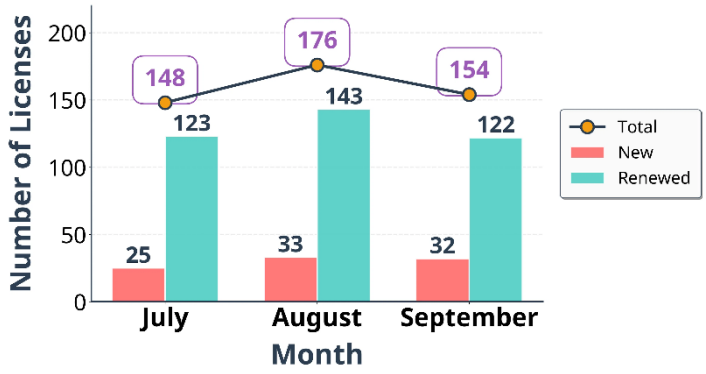
The strong momentum from Q1, particularly the peak in May, dissipated through Q2. Looking ahead, the declining trend observed in August and September across both new licences and renewals suggests that Q3 may face headwinds in matching the performance of the previous year without a significant turnaround in licensing activity.

Photo 4: Nicolette Shaw Nelson, Regional Extension Officer at the Capture Fisheries Division of NFA, in discussion with a local Fisher from Hopewell, Hanover.

	JULY	AUGUST	SEPTEMBER	TOTAL
ARTISANAL	129	160	136	**425**
INDUSTRIAL	10	8	6	**24**
RECREATIONAL	8	4	5	**17**
SPORTS CHARTER	1	4	7	**12**
TOTAL	**148**	**176**	**154**	**478**

Table 1: NUMBER OF BOAT LICENCES ISSUED BY CATEGORY, JULY TO SEPTEMBER 2025.

Figure 3: Vessel Licenses Issued per Month (July - September 2025)



A year-over-year comparison of vessel licensing activity for the second quarter (July–September) reveals significant growt0h, with total licenses increasing by 28.6% from 370 in FY2024/25 to 476 in FY2025/26. This robust expansion was primarily driven by a substantial rise in the number of artisanal licences and growth in the sports charter category.

The artisanal fleet, which forms the backbone of the sector, saw a 30.6% increase, growing from 324 to 423 licences. This not only fueled the quarter's overall growth but also increased the category's market share from 87.6% to 88.9%. Each month in the quarter posted strong double-digit growth in artisanal licensing, with July showing the largest year-over-year percentage increase at 57.9%.

The most dramatic shift occurred in the Sports Charter category, which grew by 300%, from 3 to 12 licenses. While the absolute numbers are small, this rate of growth suggests an emerging area of interest within the sector, as tournaments increase. The Recreational category also experienced healthy growth, increasing by 41.7% from 12 to 17 licenses.

Conversely, the Industrial category was the only one to see a decline, with licenses falling by 22.6% from 31 to 24. This contraction led to a decrease in its market share from 8.4% to 5.0%. Overall, the Q2 data points to a healthy and expanding licensing base, with strong year-over-year growth across most categories. The continued dominance of the artisanal fleet, coupled with significant growth in smaller but emerging categories like sports charter, indicates positive momentum and evolving dynamics within the sector heading into the third quarter.

Fisher Licences

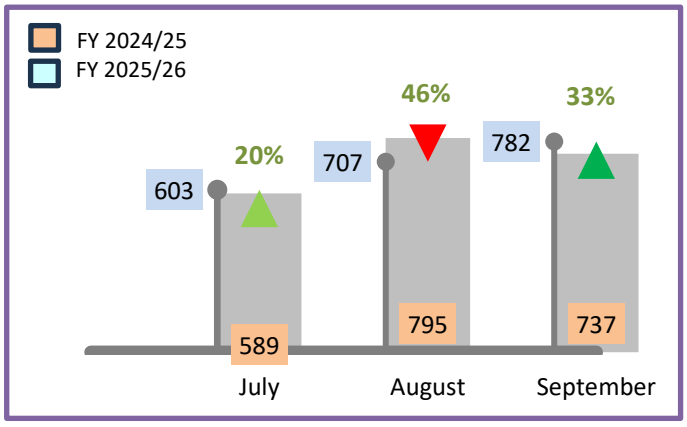


Figure 4: The total number of Fisher licences issued YOY, Q2 - FY 25/26 vs FY 24/25.

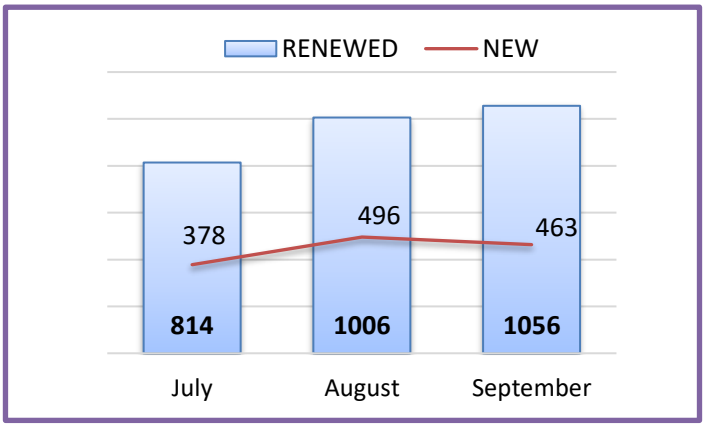


Figure 5: The number of Fisher licences issued new and renewed in Q2 - FY 25/26.

Figure 4 represents the total number of individual fisher licences issued in Q2 (July-September), with FY 2024/25 highlighted in orange and FY 2025/26 highlighted in blue. The quarter saw a modest 1.4% year-over-year increase in total licences, rising from 2,092 in FY 2024/25 to 2,121 in FY 2025/26. This growth was driven entirely by a strong performance in August, which posted a 12.4% YOY increase (707 to 795 licenses). In contrast, July and September saw declines of 2.3% and 5.8%, respectively. This mixed performance indicates a less consistent growth pattern compared to the previous quarter.

Renewals continue to dominate in Q2; new licenses peaked in August. Figure 5 compares renewed versus new fisher licences issued in Q2 of FY 2025/26. Renewals continue to be the primary driver of licensing activity, accounting for 68.3% of all licences issued during the quarter. Throughout July, August, and September, renewal of licences remained significantly higher than new licenses each month:

- July: 814 renewed vs. 378 new
- August: 1,006 renewed vs. 496 new
- September: 1,056 renewed vs. 463 new

New licenses showed a strong surge from July to August (+31.2%), peaking at 496, before declining by 6.7% in September. This suggests a mid-quarter spike in new entrants rather than a steady increase. Overall, the combined quarterly renewals totalled 2,876 compared with 1,337 new licences, reinforcing that the existing fisher base is the most significant contributor to licensing numbers.

YEAR	% renewing license from the previous year
2017	
2018	19%
2019	26%
2020	24%
2021	25%
2022	20%
2023	38%
2024	59%
**2025	56%
	Average: 33%

** Jan-Sept

Table 2: FISHER & VESSEL LICENCES RENEWAL % ISSUED FROM 2018-2025. (EXCLUDING TEMPORARY PERMITS).

Photo 5: NFA's Safety at Sea training programme is designed to train fisherfolk to operate their boats safely at international standards. 40 fishers from Trelawny, St. Ann, and Westmoreland benefited.

An analysis of fisher and vessel license renewal rates from 2018 to 2025 reveals two distinct periods: a phase of modest, fluctuating renewals from 2018 to 2022, followed by a dramatic and sustained improvement from 2023 onward. The average renewal rate of 33% over the entire period underscores a significant rising trend in compliance and retention.

From 2018 to 2022, the renewal rate hovered in a narrow band between 19% and 26%, indicating a relatively stagnant renewal environment. However, 2023 marked a significant turning point, with the rate jumping to 38%, an 18-percentage-point increase from the previous year. This upward momentum accelerated dramatically in 2024, with the renewal rate peaking at an impressive 59%.

The data for 2025 (January–September) shows a renewal rate of 56%, which, while slightly below the 2024 peak, demonstrates a consolidation of these gains and maintains a very high level of performance compared to the pre-2023 era. This sustained high rate strongly suggests that the improvements are structural rather than temporary.

This remarkable turnaround can be attributed to several factors, most notably the introduction and increased usage of the Iriefins online platform, which has streamlined the renewal process. Other contributing factors likely include improved sensitization campaigns, in-field licensing sessions, and enhanced compliance monitoring. For the industry, this sustained high renewal rate implies increasing confidence and sustainability, leading to more predictable licensing revenue, improved regulatory planning, and a more stable environment for investment.

Photo 6: (L-R) Mrs Cooke-Panton, NFA Snr. Dir. Planning, Development & Management, Dr Gavin Bellamy, NFA CEO and FAO Representative; on tour at NFA's Bowden Research Facility, St. Thomas.

Licences Issued by Parish

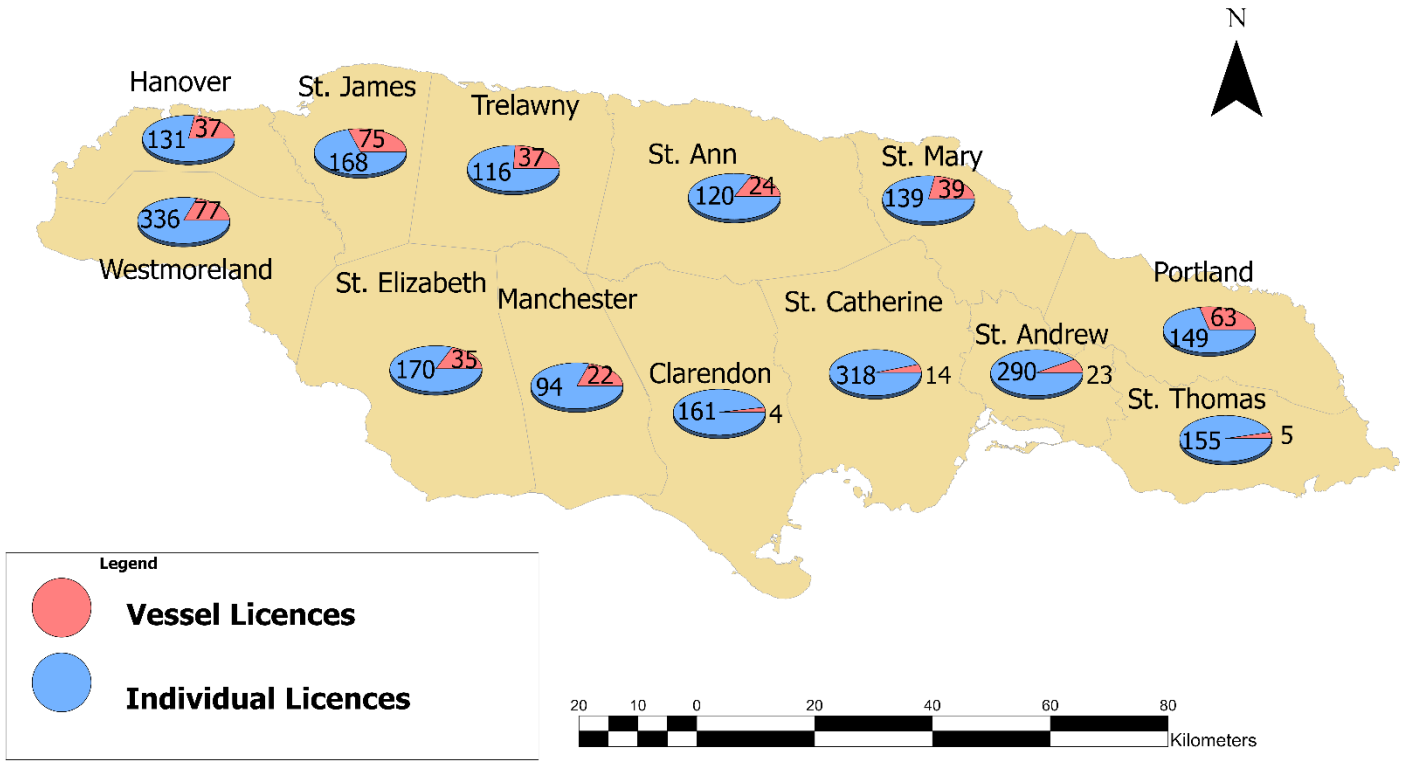


Figure 6: Vessel and Individual Licences issued by parish in Q2

Compliance

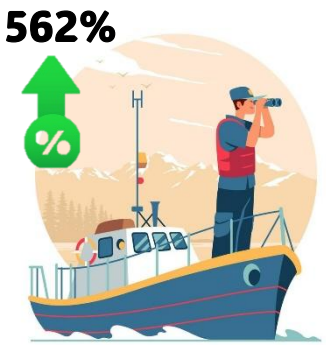


Photo 7: Dedicated sea patrols against the Q2 target.

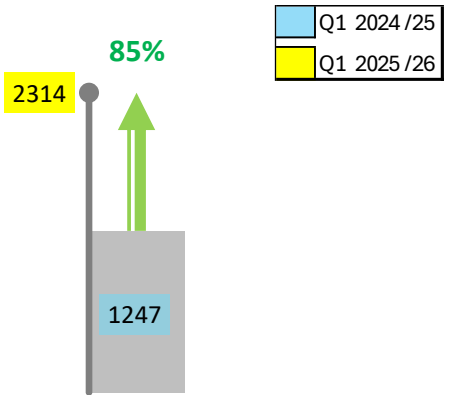


Figure 7: Site visits conducted by the Compliance Unit YOY, Q2 2024/25 vs Q2 2025/26.

40 Compliance Officers Islandwide

Fisheries compliance and enforcement activities demonstrated a remarkable improvement in the second quarter of FY 2025/26. Site visits conducted by the Compliance Unit surged by an impressive 86% year-over-year, rising from 1,247 in Q2 2024/25 to 2,314. This substantial gain reflects a strengthened commitment to enforcement and monitoring across the sector, as well as an increased staff complement that now brings the branch to 100% compliment.

This heightened activity is further underscored by a 562% increase in dedicated sea patrols against the quarterly target, indicating a robust and proactive enforcement strategy. The island's 40 compliance officers have significantly increased their operational tempo, with each officer conducting an average of nearly 58 site visits during the quarter, up from approximately 31 in the same period last year.

The overall increase in site visits and sea patrols demonstrates the Compliance Unit's firm commitment to ensuring that the Fisheries Act and its regulations are adhered to. To sustain this positive trend, it is crucial to maintain a consistent field presence, ensure reliable data capture during inspections, and monitor whether this higher level of compliance translates into a reduction in violations and supports long-term sustainability goals.

2019	2020	2021	2022	2023	2024	**2025	TOTAL
$2,642,000	$180,000	$1,145,000	$9,156,000	$4,806,700	$2,320,000	$185,000	$20,434,700

** January - September

Table 3: FINES FOR OFFENCES UNDER THE FISHERIES ACT – 2018, FROM 2019 TO **2025.

Table 3 displays the data on fines collected from breaches of the Fisheries Act from 2019 to 2025. The total amount collected over these years is $20,434,700. The highest annual collection was in 2022, with $9,156,000, representing a significant increase from $1,145,000 in 2021. For the year 2024, $2,320,000 was collected in fines, representing 11% of the total of $20,434,700 over the 6 years. In Q2 2025, overall activity showed a notable decline vs. Q2 2024. Court hearings declined from 11 to 8 (27%), inspections executed grew from 20 to 41 (105%), and joint inspections (JCF & JDF) increased from 11 to 40 (263%). Site visits climbed from 1,247 to 2,314 (85%), and JMD $0 in fines for Q2 were recorded, thus giving an accumulative ¾ year total of JMD $185,000. 0 (−100%).

Photo 8: Members of the Compliance team posting Conch Closed Season declarations.

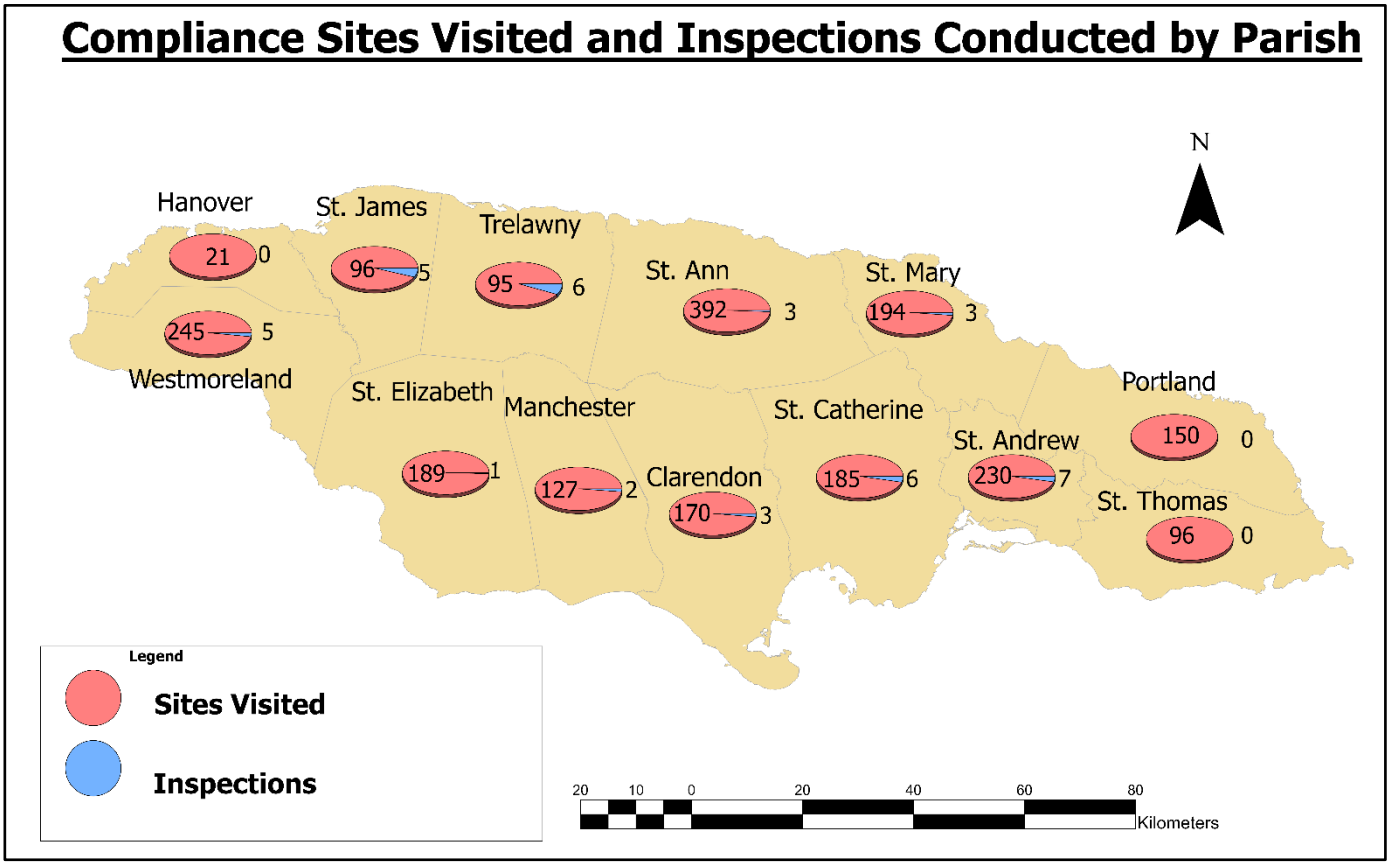


Figure 8: Compliance site visits and inspections performance conducted in Q2 2025/26 by parish.

NFA COMPLIANCE TEAM
FIELD ACTIVITIES

Photo 9: Members of the Compliance team conducting an inspection exercise.

Photo 10: Members of the Compliance team conducting an inspection at sea of a local fishing vessel for any possible breaches of the Fisheries Act.

FUN FACTS ABOUT OYSTER

1. Natural Water Filters: A single adult oyster can filter up to 50 gallons of water every day. They are so effective at cleaning water that they are considered a keystone species in many estuaries.

2. Gender Fluid: Oysters are protandric, meaning they start as males and can change their sex to female later in life. Some can even switch back and forth multiple times!

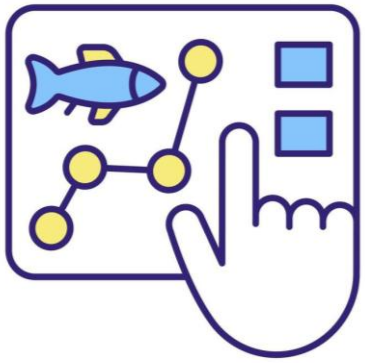
3. Ecosystem Engineers: As they grow, oysters form complex, three-dimensional reefs. These reefs provide crucial habitat for hundreds of other marine species, including fish, crabs, and shrimp, and also act as natural breakwaters that protect coastlines from erosion.

4. A Nutrient Powerhouse: Oysters are incredibly nutritious. They are packed with essential vitamins and minerals like zinc, vitamin B12, iron, and selenium, all while being low in calories and high in protein.

5. An Ancient Delicacy: Humans have been enjoying oysters for a very long time. Evidence shows that we have been eating them since prehistoric times, and the ancient Romans were the first to cultivate them in oyster farms.

6. They're Alive! When you eat a freshly shucked raw oyster, it is typically still alive. This is the best way to ensure it is fresh and safe to eat. A poke with a fork should cause a slight flinch.

FISHERY PRODUCTION STATISTICS



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 505 species of fish being caught, compared to 340 species over the previous quarter (Q2 2024/25), reflecting an 48% increase. The coastal pelagic species, including 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	✓	✓	✓
Westmoreland	✓	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	✓	✓	✓
St. Elizabeth	✓	✓	✓	✓	✓	X	✓	X	X	X	X	✓	✓	✓	X
Clarendon	✓	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	✓	✓	X
Manchester	✓	✓	✓	X	✓	✓	✓	X	✓	✓	✓	✓	X	✓	X
St. Catherine	✓	✓	✓	X	✓	✓	✓	X	✓	X	X	✓	✓	✓	X
Portland	✓	✓	X	✓	✓	X	X	✓	✓	✓	✓	X	✓	✓	✓
KSA	✓	✓	✓	X	✓	✓	✓	X	✓	✓	X	✓	✓	✓	X
Hanover	✓	✓	X	✓	X	✓	X	✓	✓	✓	✓	X	✓	✓	✓
St. Thomas	✓	✓	✓	X	✓	✓	✓	X	✓	✓	X	✓	✓	✓	X

Table 4: COMMON FISH VARIETY CAUGHT PER PARISH IN Q2 2025/26.

Table 4 shows the common fish varieties caught per parish in Jamaica during the second quarter of 2025/26. Snapper and Parrot Fish were the most common as they were caught in all the 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.

		Marine Finfish 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
2025	January	1,404.15		4th Quarter FY24/25	3,172,406,541.88		4th Quarter FY24/25	20,335,939.37		4th Quarter FY24/25
	February	845.61			1,925,311,531.56			12,246,749.77		
	March	1,753.81	**4,003.57**		3,946,139,997.83	**9,043,858,071.27**		25,399,974.24	**57,982,663.38**	
	April	993.18		1st Quarter FY25/26	2,246,063,277.05		1st Quarter FY25/26	14,384,010.74		1st Quarter FY25/26
	May	791.10			1,798,443,303.42			11,457,242.17		
	June	679.47	**2,463.75**		1,531,784,762.19	**5,576,291,342.66**		9,840,580.51	**35,681,833.42**	
	July	955.42		2nd Quarter FY25/26	2,163,420,766.22		2nd Quarter FY25/26	13,837,037.20		2nd Quarter FY25/26
	August	736.28			1,670,314,210.03			10,663,395.11		
	September	1,072.67	**2,764.37**		2,439,952,037.99	**6,273,687,014.24**		15,535,158.78	**40,035,591.09**	
	TOTAL		**9,231.69**			**20,893,836,428.17**			**133,700,087.89**	

Table 5: ESTIMATED MARINE FINFISH PRODUCTION (MT) AND VALUE (USD), 2025.

In a stark contrast to the previous quarter's robust growth, Jamaica's marine finfish production in Q2 2025/26 remained completely flat compared to the same period in the previous year. Total production for the quarter (July–September) was identical to the prior year at 2,764.37 metric tons (MT), representing 0% year-over-year growth. This stagnation follows a strong 21% increase seen in Q1.

However, the flat quarterly figure masks significant volatility within the months:

•July started the quarter strong with a 29.8% increase in production, rising from 736.26 MT to 955.42 MT.

•August remained entirely flat, with production nearly unchanged at 736.28 MT.

•September saw a sharp 17.0% decline, with production falling from 1,292.17 MT to 1,072.67 MT.

The strong gains in July were effectively cancelled out by the significant drop in September, leading to the zero-growth outcome for the quarter. The value of marine fish production in Q2 2025/26 also showed a 0% year-over-year change, with the total estimated value remaining identical to the previous year at $40,035,591.09 USD. This follows a remarkable 46.8% increase in value during Q1, highlighting a significant deceleration in the sector's financial performance in Q2.

While the overall quarterly performance was stagnant, the underlying monthly shifts—a strong start followed by a sharp decline—suggest instability. This contrasts sharply with the consistent growth seen in the first quarter and points to potential new challenges impacting the sector's output and returns.

Fishery	FY 2024/25			FY 2025/26						Total	% Composition
	January	February	March	April	May	June	July	August	September		
Atrisanal finfish	1,404.15	845.61	1,753.81	993.18	791.10	679.47	955.42	736.28	1,072.67	**9,231.69**	94.97
Sea Cucumber	6.52								0.00	**6.52**	0.07
Industrial Conch					48.86	77.1	137.43	91.51		**354.90**	3.65
Industrial Spiny Lobster*	26.33	6.95	48.23				0.00	6.31	39.97	**127.79**	1.31
Total Marine Production	**1437.00**	**852.56**	**1802.04**	**993.18**	**839.96**	**756.57**	**1092.85**	**834.10**	**1112.64**	**9,720.90**	**100**

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

Close Season

Table 6: Marine fish production (MT) trend by fishery type, 2025.

Jamaica's marine production in Q2 2025/26 (July–September) reveals a continued and strengthening dominance of the artisanal finfish sector, which now accounts for 94.9% of the total quarterly production. This is a slight increase from its 89.9% share in Q1. Total marine production for the quarter was approximately 3,039.19 MT, a notable increase from Q1's 2,661.22 MT.

Key Species Performance in Q2 2025/26:

- •Artisanal Finfish: Production remained strong at 2,764.37 MT, underscoring its role as the backbone of the fisheries sector.
- •Industrial Conch: Showed significant activity with at least 228.94 MT (July + August), representing 7.5% of the quarterly total.
- •Industrial Spiny Lobster: Production was 45.88 MT, accounting for 1.5% of the total. This was driven by landings in August (6.31 MT) and September (39.57 MT) after the close season in July.
- •Sea Cucumber: Remained at 0 MT due to the ongoing close season.

Looking at the broader period from January to September 2025, total marine production reached 9,720.90 MT. Artisanal finfish accounted for a staggering 94.97% of this total, with 9,231.69 MT landed. This highlights the sector's overwhelming contribution to Jamaica's overall marine production.

In contrast, the industrial fisheries showed more modest contributions:

- •Industrial Conch: 354.90 MT (3.65% of total)
- •Industrial Spiny Lobster: 127.79 MT (1.31% of total)

The data clearly indicate a shifting dynamic where the artisanal sector is not only dominant but also appears to be growing its share, while industrial fisheries for conch and lobster play a smaller, more specialized role. This trend has significant implications for resource management, food security, and economic planning within Jamaica's marine sector. Important Conch catch is set based on the quota established at the start of each season.

Fishery	FY 2024/25			FY 2025/26						Total USD	% Contribution
	January	February	March	April	May	June	July	August	September		
Atrisanal finfish	20,335,939.37	12,246,749.77	25,399,974.24	14,384,010.74	11,457,242.17	9,840,580.51	13,837,037.20	10,663,395.11	15,535,158.78	$ 133,700,088	95.22
Sea Cucumber	161,052.48								$ -	$ 161,052	0.11
Industrial Conch					$ 700,196	$ 1,104,902	$ 1,969,342	$ 1,311,410		$ 5,085,850	3.62
Industrial Spiny Lobster*	$ 210,668	$ 55,607	$ 385,891				$ -	$ 111,220	$ 704,618	$ 1,468,004	1.05
Total Marine Production	**$20,707,660**	**$12,302,357**	**$25,785,865**	**$ 14,384,011**	**$12,157,439**	**$10,945,483**	**$15,806,379**	**$12,086,025**	**$16,239,777**	**$ 140,414,994**	**100.00**

Table 7: Estimated value (USD) for marine fish production (MT) by fishery type, 2025.

Aquaculture Production

The second quarter of FY 2025/26 was marked by a significant downturn in tilapia production volume. Output fell to 146.21 metric tons (MT) from 165.16 MT in Q2 of the previous fiscal year, representing a steep 11.5% decrease. While the market continued to show price strength—with the estimated price per ton rising by 7.2% YoY (from ~$8,513/MT to ~$9,129/MT)—this favorable trend was not enough to compensate for the sharp drop in volume. Consequently, the total estimated value of production declined by 5.1%, falling from an estimated $1,406,025 USD in Q2 2024/25 to $1,334,741 USD in Q2 2025/26. This indicates that the production shortfall was too significant for the higher market prices to overcome.

Metric	Q2 FY 2024/25 (Est.)	Q2 FY 2025/26	Change	% Change
Production (MT)	165.16	146.21	-18.95	-11.5%
Value (USD)	$1,406,025	$1,334,741	-$71,284	-5.1%
Price/MT (USD)	$8,513	$9,129	+$616	+7.2%

The negative year-over-year performance in Q2 is further illuminated by a sharp sequential decline from the first quarter of the same fiscal year. Production volume fell from 169.84 MT in Q1 to 146.21 MT in Q2, a steep 13.9% drop. With market prices remaining virtually flat between the two quarters (hovering around $9,128/MT), the drop in production translated directly into a nearly identical 13.9% decrease in value, which fell from $1,550,200 in Q1 to $1,334,741 in Q2. This erased the gains made in Q1, where higher prices had successfully offset a minor production dip.

Metric	Q1 FY 2025/26	Q2 FY 2025/26	Change	% Change
Production (MT)	169.84	146.21	-23.63	-13.9%
Value (USD)	$1,550,200	$1,334,741	-$215,459	-13.9%
Price/MT (USD)	$9,127	$9,129	+$2	+0.02%

An examination of the monthly performance within Q2 FY 2025/26 reveals a consistent and concerning downward trend. Production started at its highest point in July and fell sharply through the subsequent months:

- July: 64.50 MT (44% of Q2 total)
- August: 48.57 MT (a 25% drop from July)
- September: 33.14 MT (a 32% drop from August)

This steady month-over-month decline highlights potential operational or environmental challenges that intensified as the quarter progressed, leading to the overall decline.

		Tilapia Production Estimate			Value Summary JMD			Value Summary USD		
	Month	Weight (MT)	Qtrly Fig (MT)	Quarter	Estimated Value J$	Qtrly Estimate J$	Quarter	Estimated Value USD	Qtrly Estimate USD	Quarter
2025	January	35.85		4th	51,373,200.88		4th	327,217.84		4th Quarter FY24/25
	February	49.00		Quarter	70,217,205.95		Quarter	447,243.35		
	March	58.50	143.35	FY24/25	83,830,621.00	205,421,027.83	FY24/25	533,953.00	1,308,414.19	
	April	38.50		1st	55,170,661.93		1st	351,405.49		1st Quarter FY25/26
	May	56.42		Quarter	80,850,098.46		Quarter	514,968.78		
	June	74.92	169.84	FY25/26	107,360,675.72	243,381,436.11	FY25/26	683,825.96	1,550,200.23	
	July	64.50		2nd	92,442,590.67		2nd	588,806.31		2nd Quarter FY25/26
	August	48.57		Quarter	69,621,130.33		Quarter	443,446.69		
	September	33.14	146.21	FY25/26	47,490,550.06	209,554,271.06	FY25/26	302,487.58	1,334,740.58	
	TOTAL		459.40			658,356,735.00			4,193,355.00	

Table 8: ESTIMATED TILAPIA PRODUCTION (MT) AND VALUE (USD), 2025.

The second quarter of FY 2025/26 was defined by a significant production slump that erased the market-driven gains of Q1. Both year-over-year and quarter-over-quarter comparisons show a clear negative trend, with an 11.5% YoY drop in volume and a 13.9% sequential drop from Q1. While market prices remained robust, they were not enough to overcome the production shortfall. The consistent monthly decrease in production throughout Q2 suggests that the issues impacting output were not isolated but persistent, underscoring a critical need to address the root causes of the production decline to capitalize on otherwise favorable market conditions.

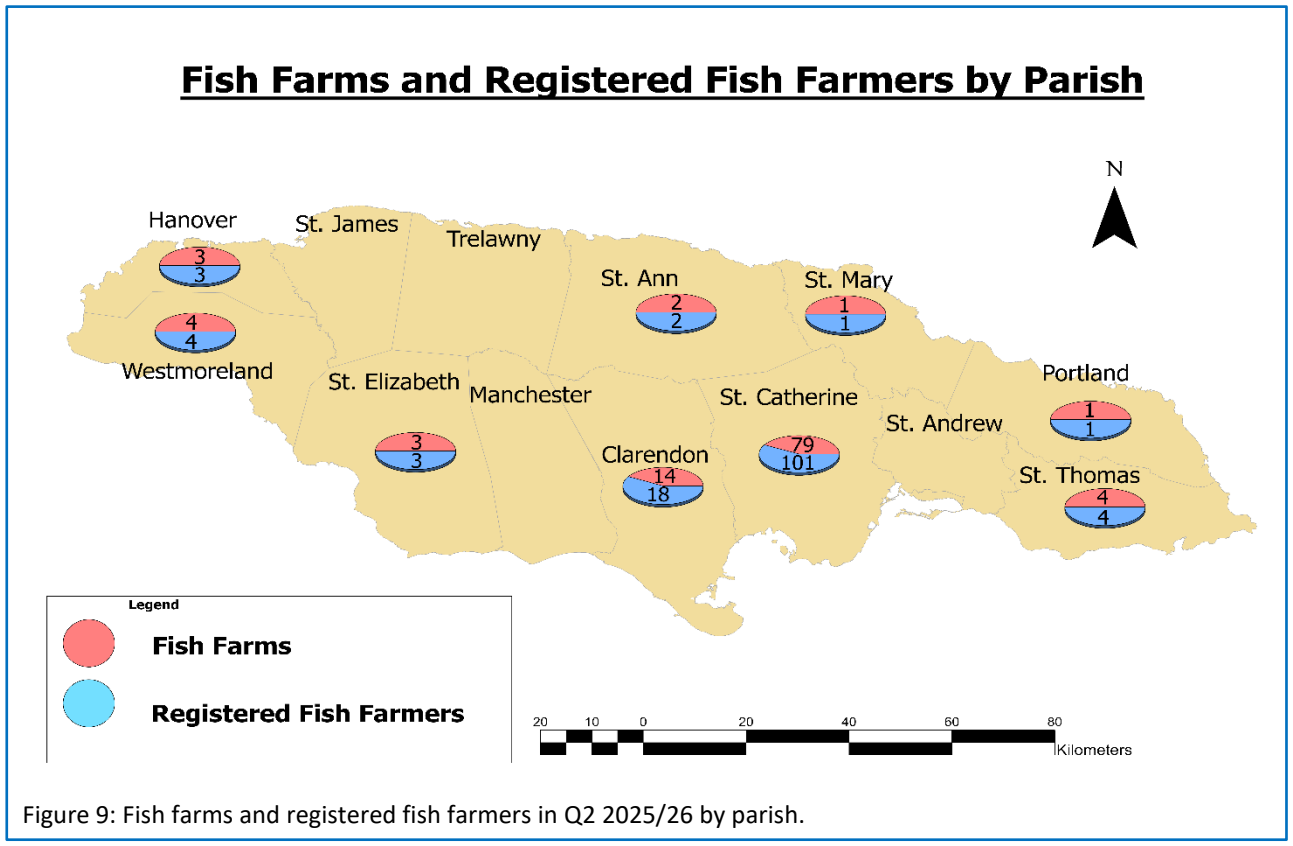


Figure 9: Fish farms and registered fish farmers in Q2 2025/26 by parish.

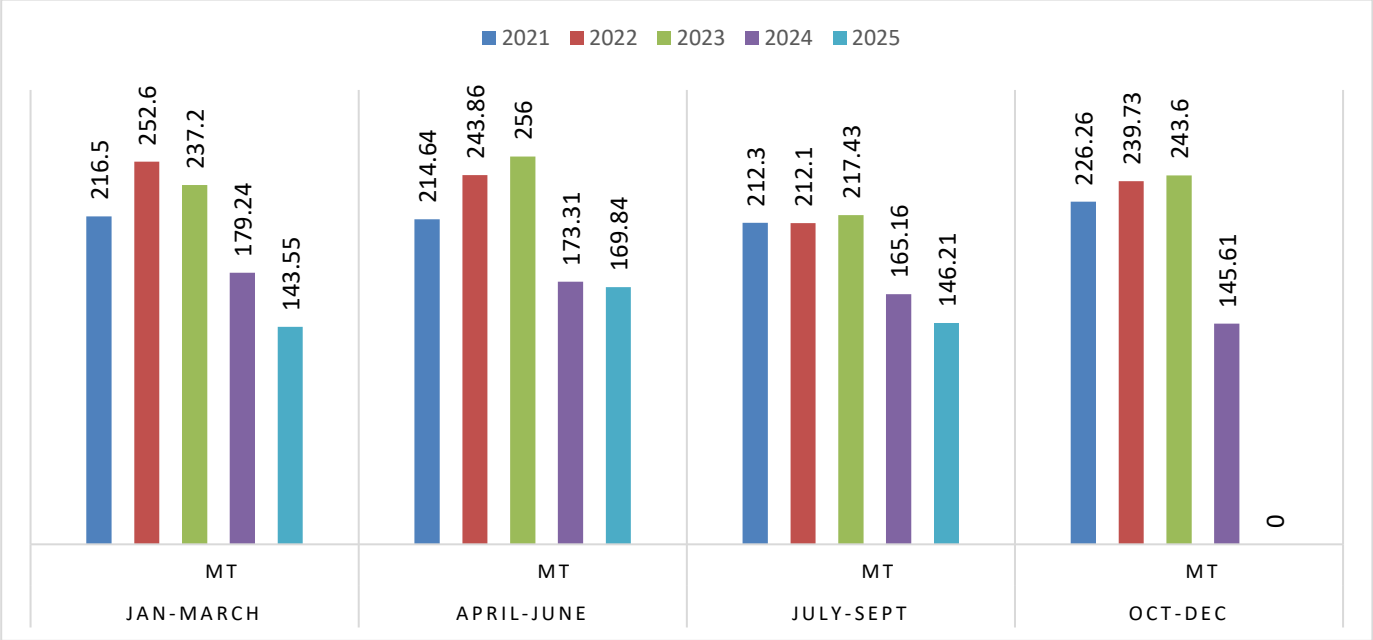


Figure 10A: Aquaculture tilapia quarterly production, 2021 to 2025.

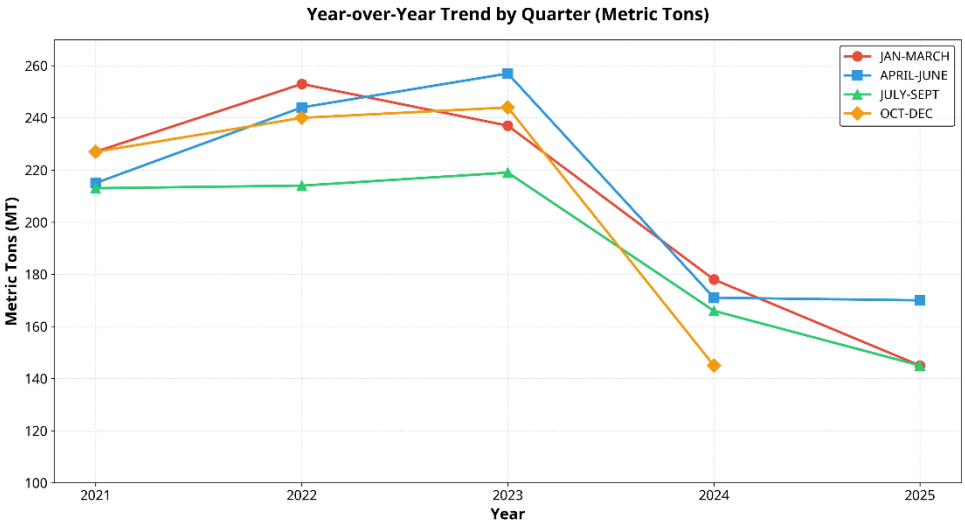


Figure 10B: Aquaculture year-over-year trend by quarter, 2021 to 2025.

Photo 11: Hon. Min. Floyd Green MP, Minister of Agriculture, Fisheries & Minning examine a sample of a sea Moss harvested at the NFA's Bowden Research Facility, St. Thomas.

A review of quarterly aquaculture fish production from 2021 to 2025 reveals a significant cycle of expansion and contraction. As detailed in the bar chart, production peaked in 2022 and 2023, with output in the April-June quarter reaching a high of 256.00 metric tons (MT) in 2023. This period of strong performance was followed by a sharp and rapid decline across all quarters, a trend clearly visualized by the steep downward trajectory in the line chart. For example, production in the October-December quarter fell by 40% from 243.60 MT in 2023 to 145.61 MT in 2024. The data for 2025 indicates a continued contraction in the first half of the year, with zero values for the latter half signifying that production figures have not yet been reported for those periods.

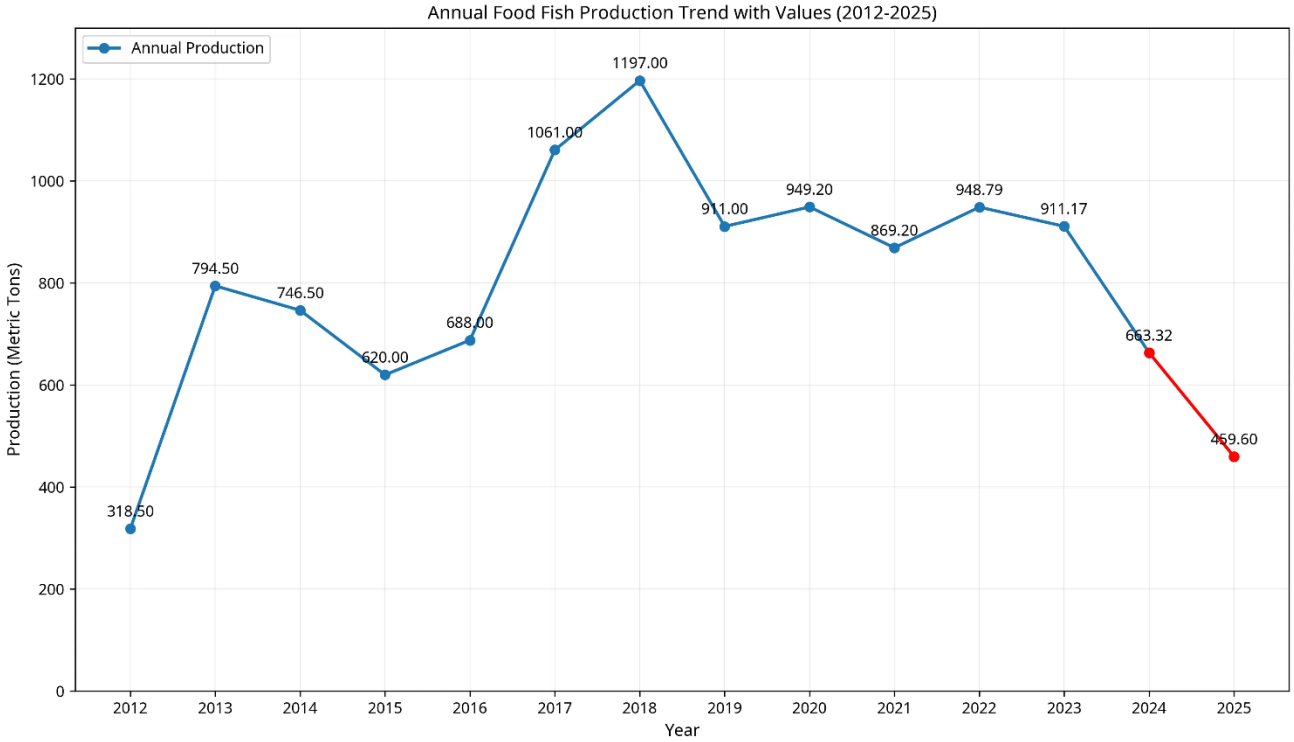


Figure 11: Aquaculture production in MT from 2012 to 2025.
* 2025 – January - September

Pond production capacity increased by 550 acres in operation—5% below the 580-acre quarterly target. The plan was to renovate 2 ponds for the quarter, but instead, 12 were completed for this period (600% of the planned renovations). Prawn seedstock improved markedly, as post-larvae output reached 96,000 against a 50,000 target, a 92% increase over the quarterly goal. Human capital development also strengthened, with 21 prospective fish farmers trained versus a target of 10, amounting to a 110% achievement of the training objective for the quarter. Collectively, these percentages reflect meaningful gains across capacity, infrastructure, seed supply, and skills, illustrating that the team is laying the foundational work to support the sector's rebound and sustained growth in Jamaica's aquaculture.

Photo 12A & B: New regional mariculture project, with FAO and NFA - built 2 finfish cages at Bowden Harbour, St. Thomas. A marine nursery lab system was also set up with red snapper juveniles that were imported for the cages.

EXPORT FACTS ABOUT OYSTER

Jamaica Oyster Export Information

Overview

Yes, Jamaica does export oysters overseas, though at relatively modest volumes compared to major global exporters. According to the World Bank's World Integrated Trade Solution (WITS) database, Jamaica exported oysters valued at $360,450 USD with a total quantity of 19,166 kg in 2022. This places Jamaica among the smaller oyster-exporting nations globally, far below major exporters such as France ($141.4 million, 16.8 million kg), Canada ($71.4 million, 6.6 million kg), and Ireland ($50.4 million, 7.9 million kg).

Export Price Trends

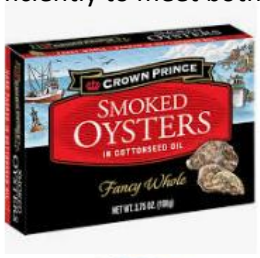
The export price per kilogram of oysters from Jamaica has experienced significant volatility over the past decade. In 2012, the export price stood at just $4.00 per kg, but by 2018, it had surged dramatically to $23.62 per kg, representing a 490% increase and marking the peak of Jamaica's oyster export pricing. However, this peak was followed by a steady decline, with prices falling to $20.43 per kg in 2019 and further decreasing to $18.15 per kg by 2021. Market predictions suggested continued downward pressure, with projected prices of $16.87 per kg for 2023 and $15.60 per kg for 2024. As of 2026, current wholesale prices for Jamaican oysters range between $13.35 and $26.70 per kg, while retail prices span $19.07 to $38.14 per kg.

Production Background

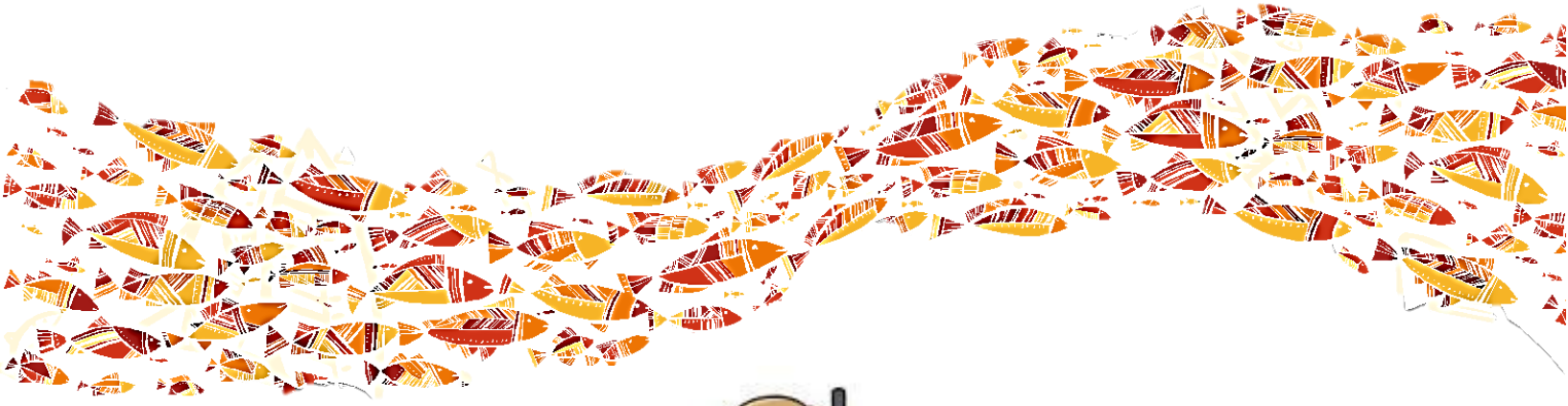
Jamaica has been practicing oyster production since the 1980s, utilizing relatively low-technology infrastructure for cultivation. According to the Jamaica Trade Portal managed by the Ministry of Agriculture, the local oyster industry has experienced rising demand in recent years. Oysters are marketed primarily on the half-shell for the local market, which includes hotels, restaurants, and individual consumers. There is also growing interest in value-added products such as oyster punch, shucked meat, bisques, and soups. The government has identified oyster production as a key investment opportunity within the aquaculture sector, promoting development of oyster hatcheries, depuration facilities, and processing infrastructure to support both domestic consumption and export potential.

Market Context

While specific export destination countries for Jamaican oysters are not detailed in available sources, the broader context of Jamaica's seafood exports provides some insight. In 2023, Jamaica exported a total of $18.4 million in fish, crustaceans, and molluscs, ranking it 123rd globally among seafood exporters. The United States received $3.25 million of Jamaica's seafood exports in 2023, suggesting North America may be a key market for Jamaican oyster exports as well. The government's aquaculture development strategy indicates ambitions to expand exports to Caribbean territories and North America once domestic production capacity increases sufficiently to meet both local and international demand.



BIOLOGICAL DATA
MARINE SPECIES



Lobster

As part of our ongoing commitment to sustainable fishery management, this second-quarter review revisits the comprehensive lobster biometric dataset compiled between 2021 and 2025. The dataset, comprising 5,747 records, continues to provide a robust foundation for understanding population dynamics. The sampling, heavily concentrated in Westmoreland (74.7%), has established a baseline average carapace length of 9.06 cm and an average whole weight of 634.93 g. These figures, dominated by smaller individuals, underscore the importance of continuous monitoring to track size and weight fluctuations over time.

Temporal analysis of the five-year data reveals significant variations. The heaviest average weight was recorded in 2021 (674.93 g), while the highest average carapace length emerged in 2025 (13.78 cm). Gender-specific analysis indicates that males, on average, are heavier (677.57 g) but possess a slightly shorter carapace length (9.04 cm) compared to females (579.72 g and 9.08 cm, respectively). This suggests that reproductive factors may contribute to elevated female weight, a key consideration for assessing stock health.

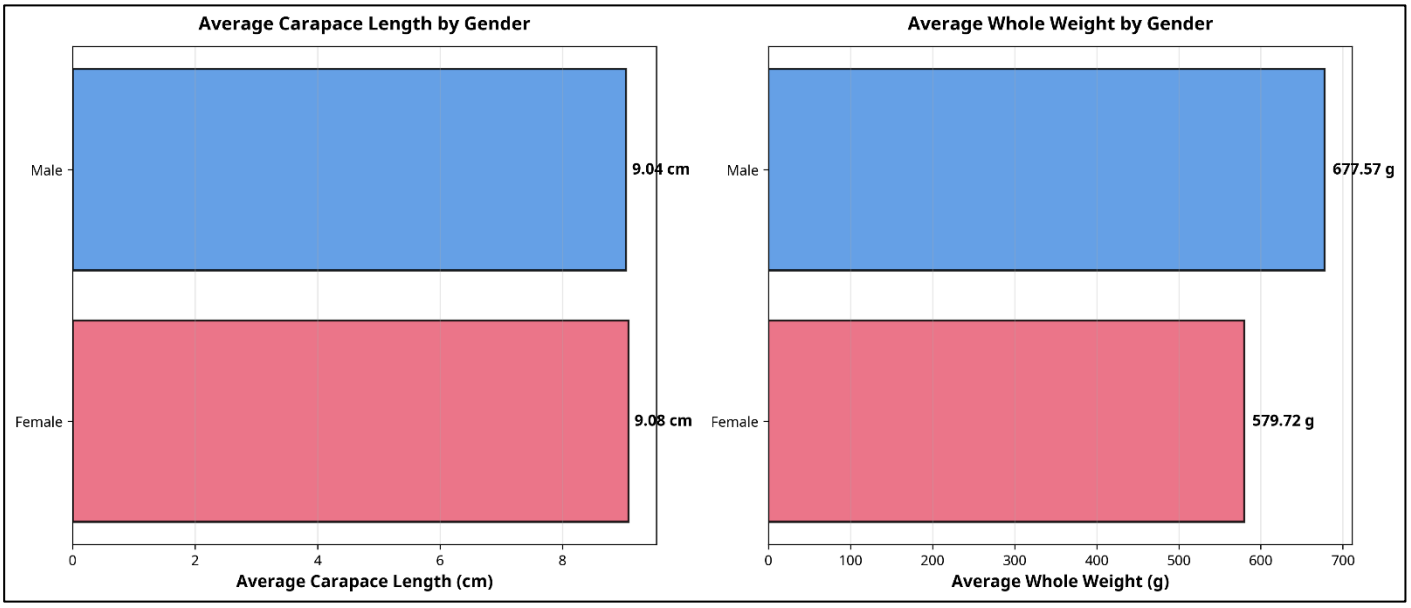


Figure 12: Bar graph highlighting average carapace and whole weight by gender analysis.

Sex Ratio Dynamics

The male-to-female ratio in the sampled lobster population has shown considerable volatility, reflecting dynamic shifts in gender composition or sampling conditions. In 2021, the population was strongly male-dominated (1.85:1), a trend that gradually diminished through 2022 (1.79:1) and 2023 (1.22:1). A dramatic reversal occurred in 2024, with a female-dominated ratio of 0.37:1. The most recent full year of data, 2025, saw the ratio return to a more balanced 1.07:1. This ongoing variability highlights the need for consistent sampling methodologies to distinguish between natural population shifts and sampling-induced biases.

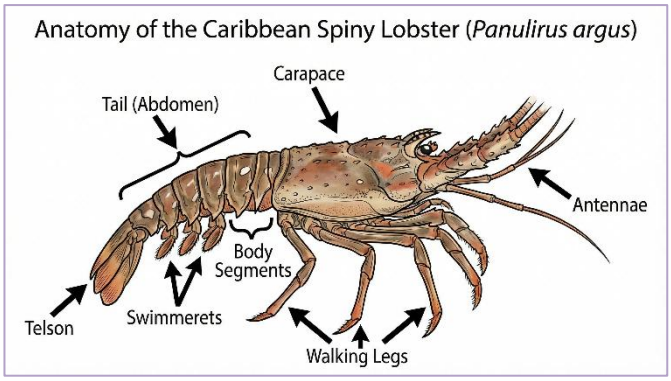


Photo 13: Labelling of a Caribbean spiny lobster.

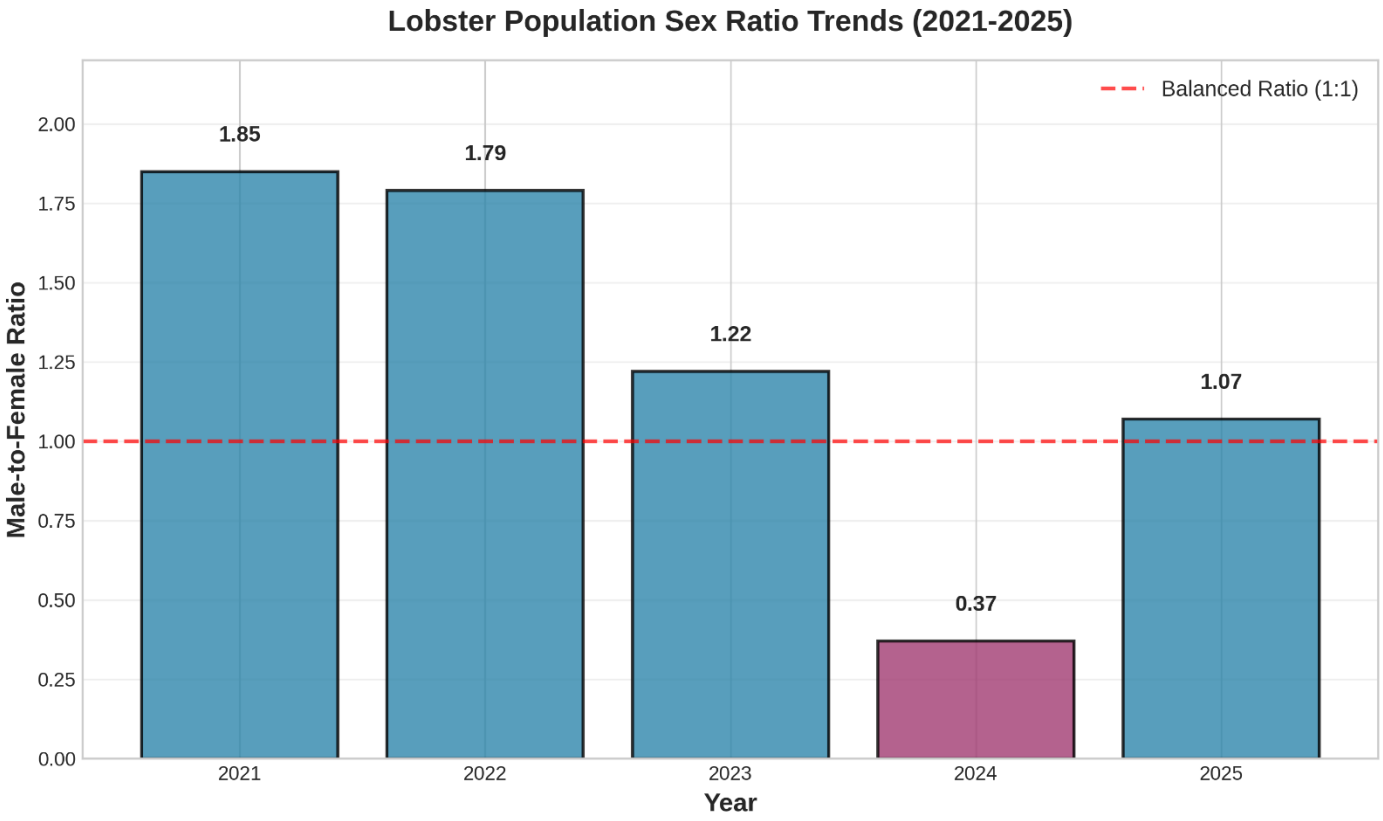


Figure 13: Bar graph highlighting lobster population sex ratio trends (2021-2025).

Conch

Biological sampling and analysis of conch landings remain a cornerstone of our management strategy for this valuable fishery. This second-quarter review re-examines the data from the 2025 queen conch fishing season, which provides vital indicators of stock health and processing standards. The initial sample of 2,273 individuals, taken in May and June 2025, consisted of 1,038 males (46%) and 1,235 females (54%), representing a nearly 1:1 ratio essential for healthy reproductive activity.

Key measurements from this sample include “dirty” weight (animal removed from shell) and “50% clean” weight (shell, viscera, and opercula removed). The “50% clean” weight is particularly significant as it forms the basis for individual quotas and export permits. The data revealed a mean dirty weight of 121.5 g and a mean 50% clean weight of 105 g, indicating a 14% weight loss during processing. By sex, females were, on average, larger than males, with a mean dirty weight of 148.9 g compared to 140.8 g for males. This statistically significant difference ($p<0.05$) underscores the presence of sex-based weight dimorphism in the conch population.

Photo 14: Marine Biologist conducting biological sampling on a conch shell.

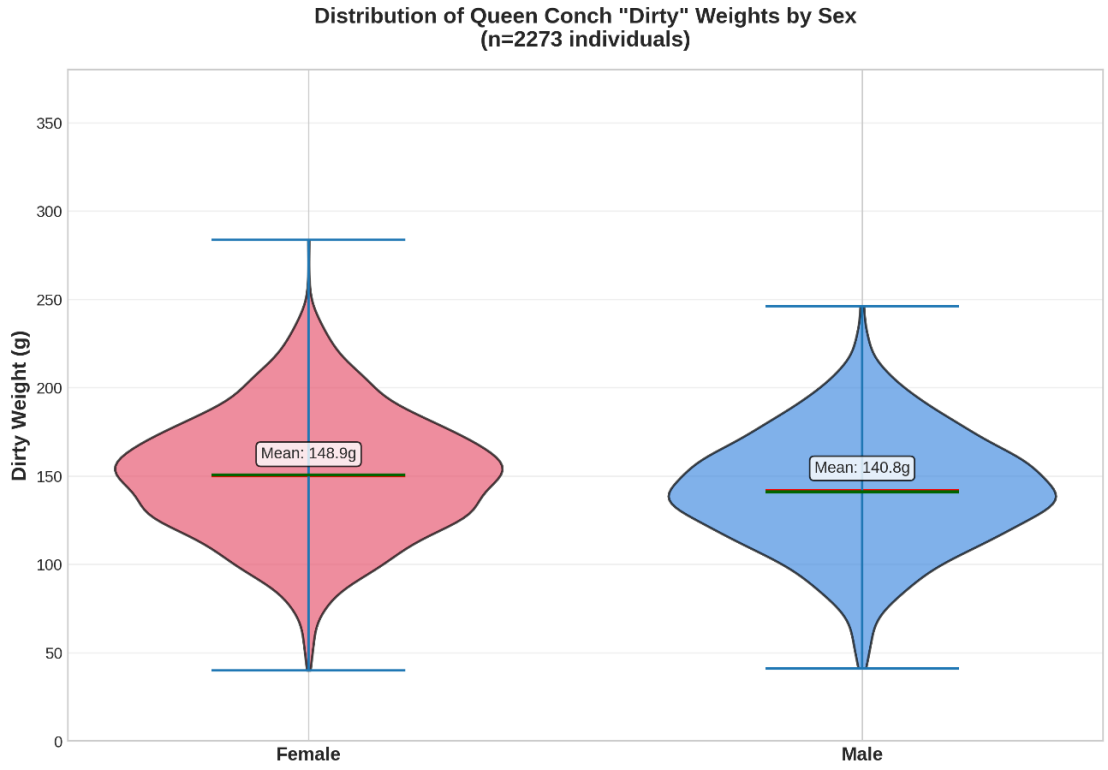
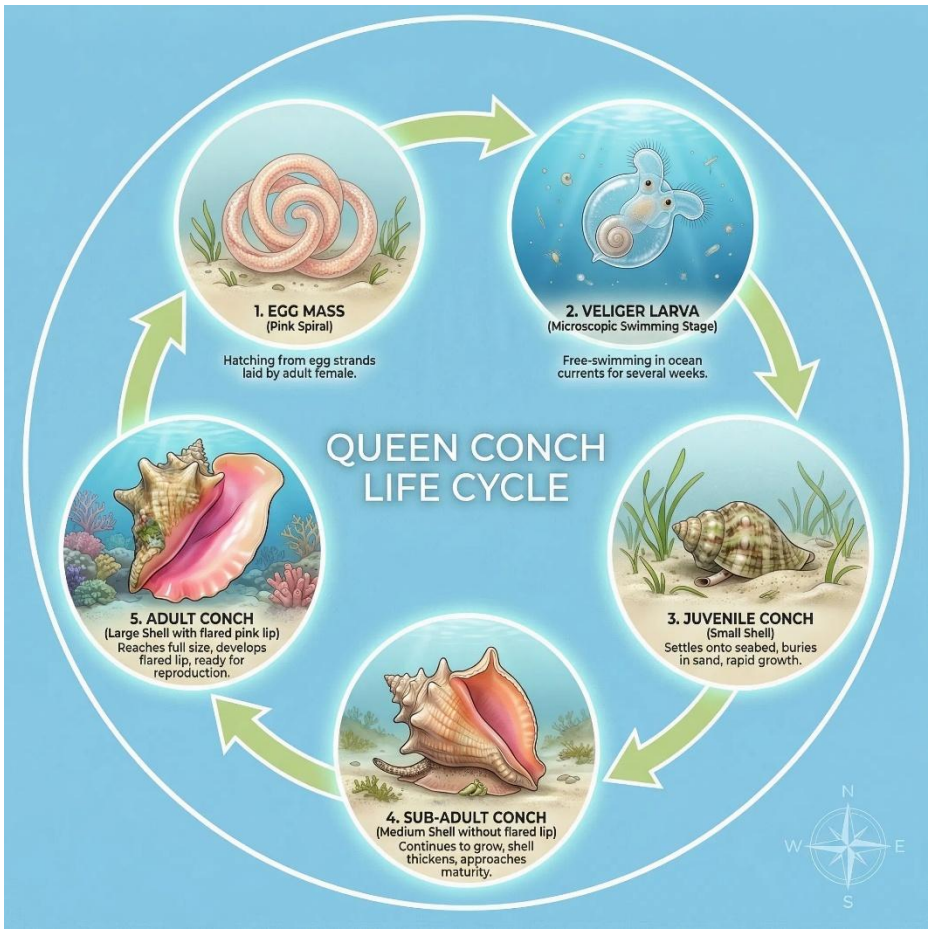


Figure 14: Boxplot comparison of Queen conch “dirty” weights by sex from a sample of 2273 individuals.



SOCIOECONOMIC OVERVIEW

This section provides an updated analysis of the fisher population data spanning 18 months (April 2024 – September 2025). The primary objective is to dissect gender distribution, identify temporal trends, and interpret the socio-economic implications for the fishing industry. The data reveals a sector characterized by significant gender disparity, seasonal fluctuations, and notable overall growth. While the number of male fishers has increased, the industry remains overwhelmingly male-dominated, with men constituting approximately 90% of the workforce. This analysis highlights critical areas for consideration, including the economic drivers of participation, potential barriers for female engagement, and the long-term sustainability of the industry in the face of growing labor involvement.

The data indicates a growing industry. A year-over-year comparison of the July-September quarter shows that the average number of fishers increased by 10%, from 633.7 in Year 1 to 697.3 in Year 2. However, this growth masks a troubling gender divergence. Male participation expanded by 13.2% (from an average of 567.0 to 642.0), while female participation declined by 17.0% (from an average of 66.7 to 55.3). This signals that fishing is becoming an even more critical economic activity in Jamaica, but the benefits are not being shared equally across genders. The overall growth can be a double-edged sword:

- Positive Economic Impact: More individuals engaged in fishing can translate to increased local income, food security, and economic activity.
- Risk of Overfishing: A rapid increase in fishing effort, if unmanaged, can put immense pressure on fish stocks. Without corresponding sustainability measures, this growth could lead to resource depletion, threatening the long-term viability of the very industry people depend on.

The trend of increasing male participation necessitates a proactive approach from local authorities or fisheries management bodies to ensure that the harvest remains sustainable. The rate of increase for males is positive, while females are experiencing a decline, meaning that the industry is not only expanding but also becoming even more concentrated with men. The most recent data from Q2 2025/26 (July-September) reveals a particularly concerning trend: female representation, after hovering near the 10% mark throughout most of the 18 months, dropped sharply to 5.5% in September. This is the lowest point in the entire dataset and warrants urgent investigation to understand if it represents a new barrier to female participation, a seasonal anomaly, or a reflection of broader socio-economic factors. While July remains a month of traditionally low participation for both genders, the significant drop in female numbers in September presents a new and troubling dynamic for the sector that requires immediate attention from fisheries management and gender equity advocates.

Photo 15: NFA's CEO, Dr Gavin Bellamy, appeared on the CVM morning program Sunrise to discuss the blue economy challenges and opportunities.

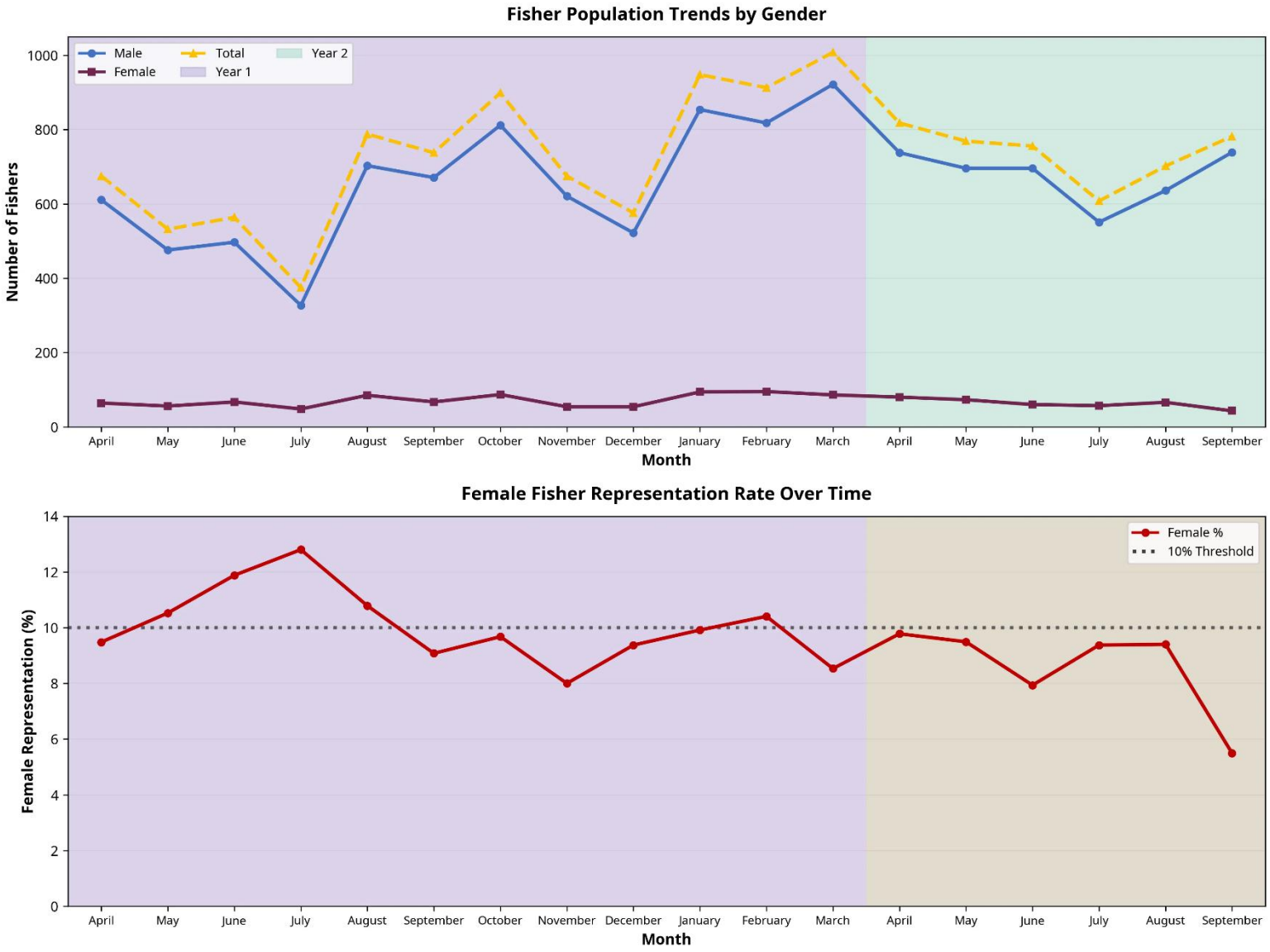


Figure 15A & 15B: Line chart showing the absolute growth in male, female, and total fishers over the 18 months.

Photo 16: Jamaicans engaging in fishery-related activities, males predominantly venture out to fish, and the females engage in the selling of the catch that is usually bought from the fishermen.

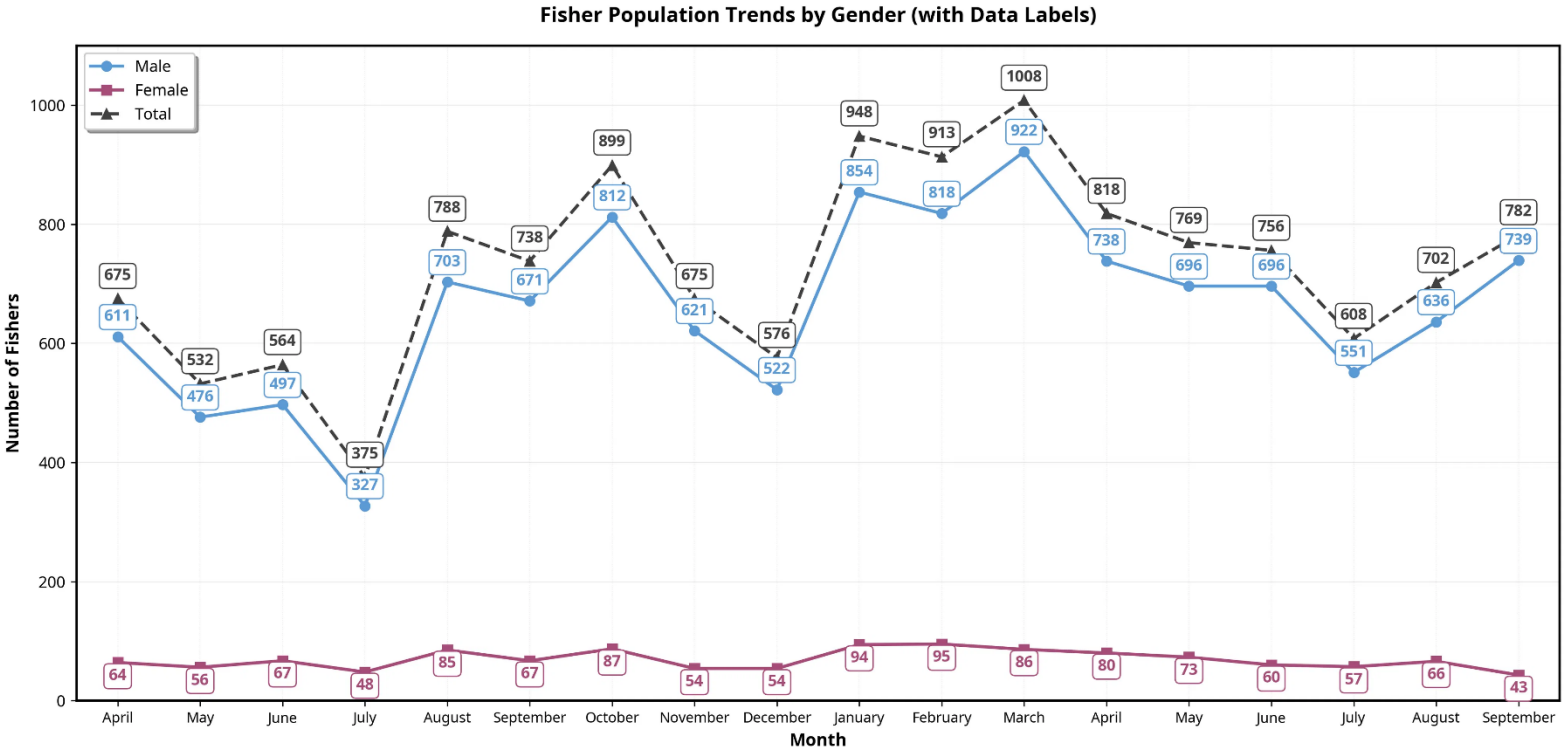


Figure 16: Multi-line graph highlighting all three metrics (Male, Female, Total) to show overall growth patterns.

Age

The fishery sector has demonstrated continued growth in the second quarter of the 2025/26 financial year. The total number of active fishers (both new and renewed) in Q2 2025-26 was 2,092, representing a +10.0% increase from the 1,901 fishers recorded in Q2 2024-25. This year-over-year growth is driven by increases in both new entrants and the retention of existing fishers. In Q2 2025-26, there were 609 new fishers and 1,483 renewed fishers, compared to 498 new fishers and 1,403 renewed fishers in Q2 2024-25.

The retention rate, a key indicator of the sector's stability, varies significantly by age group. As shown in Figure 17, the 56 & Older age group demonstrates the highest retention rate at 82.4%, followed by the 36-55 age group at 74.5%. The 17-35 age group has the lowest retention rate at 53.1%, suggesting that younger fishers are more likely to leave the profession or not renew their licenses. This age-based retention gradient has important implications for the future of the fishery sector, as it points to the need to better understand and address the challenges faced by younger fishers to ensure long-term workforce sustainability.

Photo 17: An elderly fisherman teaches his younger counterpart the technique and skills of the trade.

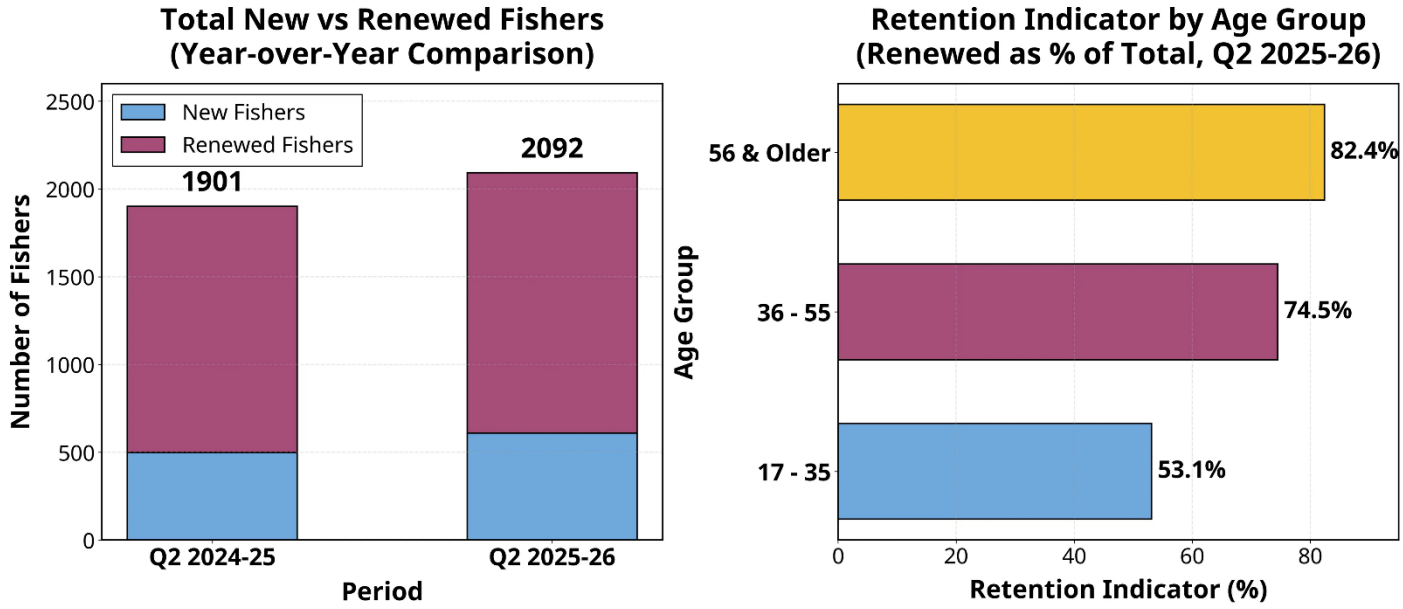


Figure 17: New and Renewed Fishers by age group: Q2 2024-25 vs. Q2 2025-26.

Figure 18A provides a snapshot of the age distribution of all licensed fishers for the second quarter of the 2025/26 financial year (July to September 2025). The data reveals that the 36-55 age group continues to represent the largest cohort, comprising 41.0% of the total fisher population with 858 individuals. The 56 & Older group follows at 30.9% (646 fishers), while the youngest group of fishers, aged 17-35, makes up the smallest portion at 28.1% (588 fishers).

Figure 18B shifts the focus to a year-over-year comparison of renewed fishers between Q2 2024/25 and Q2 2025/26, highlighting significant shifts in retention across different age demographics. The most notable trend is the substantial +28.9% increase in renewed licenses among the 17-35 age group, which grew from 242 to 312 fishers. The 36-55 cohort also saw a modest increase of +4.6%, rising from 611 to 639 renewed licenses. In contrast, the 56 & Older group experienced a slight decline of -3.3%, with the number of renewed licenses decreasing from 550 to 532.

These trends reveal an encouraging development: despite the 17-35 age group having the lowest retention rate (53.1%), this cohort is showing the strongest year-over-year growth in renewed licenses (+28.9%). This suggests a positive trend in retaining younger fishers compared to the previous year, indicating that efforts to engage and support early-career fishers may be gaining traction. Conversely, while the 56 & Older group maintains the highest retention rate (82.4%), the absolute number of renewals in this age bracket is declining (-3.3%), likely reflecting natural attrition through retirement. The 36-55 age group, representing the sector's core workforce at 41.0% of all fishers, demonstrates both stable retention rates (74.5%) and modest growth in renewals (+4.6%), suggesting a healthy and sustainable mid-career fisher population.

Figure 18A: Age Distribution of Licensed Fishers Q2 2025/26 (July-September 2025)

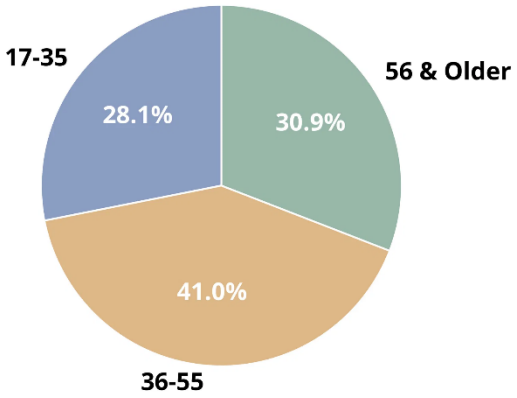
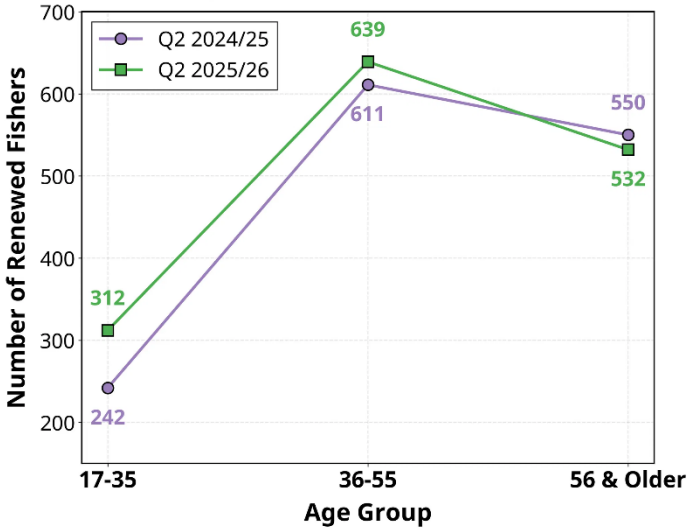


Figure 18B: Renewed Fishers by Age Group Q2 2024/25 vs Q2 2025/26



Gross Domestic Product (GDP) Status

The data reveals a notable volatility in the fishing sector's contribution to the national economy over the seven years from 2018 to 2024. In absolute terms, the fishing sector's GDP ranged from a low of USD 90.16 million in 2021 to a remarkable peak of USD 209.68 million in 2023, before settling at USD 207.53 million in 2024. This represents more than a doubling of output between 2021 and 2023, suggesting a period of significant expansion or recovery. As a percentage of total GDP, fishing's contribution fluctuated between 0.60% and 1.08%, with the highest proportional contribution occurring in 2023. This spike in 2023 is particularly striking, as it represents both the highest absolute value and the highest percentage contribution throughout the entire period, indicating that the fishing sector grew at a faster rate than the overall economy during that year.

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

When examining the fishing sector's position within the broader Agriculture, Forestry & Fishing category, the data shows considerable variation in its relative importance. The sector's contribution to this parent category ranged from 8.29% in 2021 to 18.76% in 2023, with the 2023 figure representing a dramatic increase that nearly doubled the sector's share compared to previous years. This suggests that while the overall Agriculture, Forestry & Fishing sector grew modestly from $1,117.90 million in 2023 to $1,752.70 million in 2024, the fishing component experienced disproportionate growth in 2023 before moderating in 2024. The decline in fishing's share of the agriculture sector from 18.76% in 2023 to 11.84% in 2024, despite maintaining a high absolute GDP value, indicates that other components of the agriculture sector (particularly forestry and general agriculture) experienced substantial growth in 2024, outpacing the fishing sector's performance.

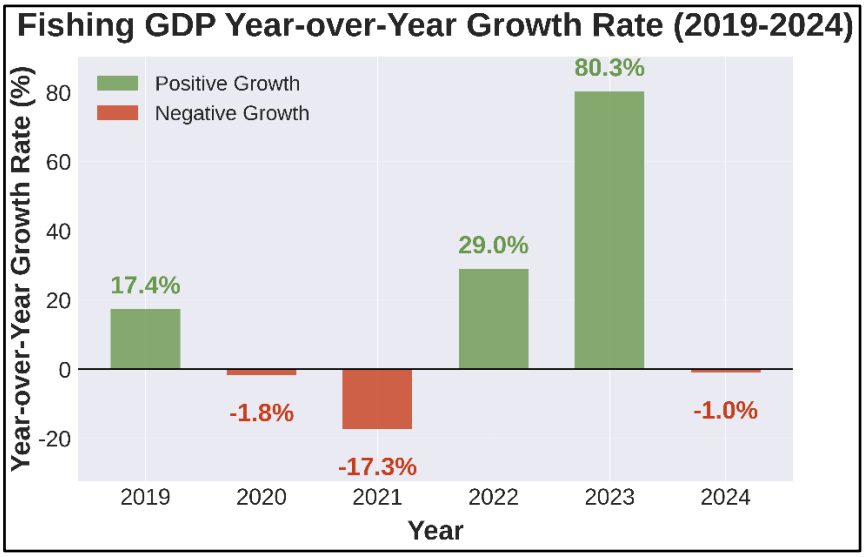


Photo 14: Male fish vendor displaying his fresh fish for sale.

Fish Price Index

The locally supplied market for fish is dominated by reef fish species, such as the common parrot, grunt, and snappers, caught by the artisanal fleet. Offshore pelagic species such as Kingfish, Dolphinfish and Tunas make up the second most important group targeted by local fishers. Despite several lost fishing days due to bad weather over the quarter, prices for these fish groups remained stable compared to previous quarters, averaging around $1000/lb. There were, however, regional differences among parishes where, for instance, St. Mary, Trelawny, and St. James, located in the north, had higher average and modal prices compared with parishes located in the south. Westmoreland and Kingston & St. Andrew had the overall lowest prices across parishes for the most important fish groups. In terms of value, Snappers were the highest, followed by Parrots, Grunts, Jacks, and the offshore pelagic species. This is indicative of customer preferences for locally caught reef fish and deep slope species over offshore pelagic species.

PARISH	SNAPPERS		PARROTS		GRUNTS		JACKS		TUNAS		KINGFISH	
	AVERAGE	MODE	AVERAGE	MODE	AVERAGE	MODE	AVERAGE	MODE	AVERAGE	MODE	AVERAGE	MODE
CLARENDON	908	1000	791	1000	766	1000	940	1000				
HANOVER	893	1000	712	1000	782	1000	886	1200	770	800		
KNG & ST. AND	868	1000	800	800	555	700	825	1000			700	800
MANCHESTER	967	1000	622	600	789	1000	928	1000	900	1000		
PORTLAND	989	1200	879	1000	767	800	828	800	643	500	750	800
ST. CATHERINE	1233	1000			700	700	400	400				
ST. ELIZABETH	933	1000	944	1000	763	1000	1000	1000				
ST. MARY	1274	1200	1095	1200	1027	1200	725	600	540	500		
ST. THOMAS	999	1000	968	1000	960	1000	863	1000			790	800
ST.ANN	992	1000	944	1000	898	1000	854	1000				
ST.JAMES	1170	1200	1186	1200	1122	1200	1154	1200	1160	1200		
TRELAWNY	1107	1200	1140	1200	1125	1200	1103	1000	1000	1200	1200	1200
WESTMORELAND	955	1000	464	500	504	500	891	1200	660	600		

Table 10: Average and most common (modal) prices (JA$/lb) of select fish groups targeted by artisanal fishers during the period July – Sept. 2025.

CONCLUSION

The second quarter of the 2025/2026 fiscal year has demonstrated continued growth and resilience in Jamaica's fisheries sector, building upon the strong momentum established in the first quarter. The data presented in this report reflect a maturing industry, with the total number of active fishers reaching 2,092, representing a 10.0% year-over-year increase from the 1,901 fishers recorded in Q2 2024/25. This expansion was driven by increases in both new entrants (609 fishers, up 22.3%) and renewed licenses (1,483 fishers, up 5.7%), indicating sustained confidence in the sector. The vessel licensing activity, while showing a more modest performance with 478 total licenses issued (nearly flat with the previous year), demonstrated resilience through a 4.6% increase in renewals. The impressive 56% renewal rate for fisher and vessel licenses, maintaining the high levels achieved in 2024, confirms that the improvements brought about by the Iriefins online platform and enhanced sensitization campaigns have become structurally embedded in the sector's operations.

The quarter was also marked by a substantial strengthening of compliance and enforcement activities, underscoring the National Fisheries Authority's commitment to sustainable fisheries management. Site visits conducted by the Compliance Unit surged by an impressive 86% year-over-year, rising from 1,244 to 2,314 visits, while joint operations with the Jamaica Defence Force and Jamaica Constabulary Force increased by 85% to 40 patrols. This heightened enforcement presence, combined with 41 inspections executed and 179.84 lbs of products seized, reflects a more vigilant and effective regulatory framework essential for deterring fisheries crimes and illegal, unreported, and unregulated (IUU) fishing. The biological sampling program continued to provide critical data for evidence-based management, with 2,752 lobster samples and 1,875 conch samples collected during the quarter. This commitment to data-driven decision-making ensures that conservation measures, such as size limits and seasonal closures, are grounded in scientific evidence and tailored to the specific dynamics of Jamaica's marine ecosystems.

The socio-economic analysis of the fisher population reveals important demographic trends that have significant implications for the sector's long-term sustainability. The age distribution data shows that the 36-55 age group remains the backbone of the industry, comprising 41.0% of all licensed fishers (858 individuals), while the 17-35 age group represents 28.1% (588 fishers) and the 56 & Older group accounts for 30.9% (646 fishers). The retention rates vary markedly by age, with the 56 & Older group demonstrating the highest retention at 82.4%, followed by the 36-55 group at 74.5%, and the 17-35 group at 53.1%. However, the year-over-year comparison of renewed licenses reveals an encouraging trend: the 17-35 age group showed the strongest growth at +28.9% (from 242 to 312 renewed licenses), suggesting that efforts to engage and support early-career fishers are beginning to bear fruit. This positive development is critical for ensuring generational continuity in the sector, even as the 56 & Older group experiences a slight decline in absolute renewal numbers (-3.3%), likely reflecting natural attrition through retirement.

Looking ahead, the National Fisheries Authority will continue to build on the achievements of this quarter by strengthening compliance, expanding technological innovation, and fostering a culture of co-management with our fishing communities. The challenges of overfishing, climate change, and the need to attract and retain younger fishers require constant vigilance and adaptive management strategies. The data and trends presented in this report—from sustained licensing growth and record-high renewal rates to enhanced enforcement and comprehensive biological monitoring—provide a solid foundation for navigating these challenges. The economic contribution of the fisheries sector, with production values of USD 40 million for finfish and USD 44.1 million for total marine production, underscores its vital role in Jamaica's blue economy. With the continued collaboration of all stakeholders, including our dedicated fishers, government partners, and the broader fishing community, we are confident that Jamaica's fisheries sector will continue to thrive, providing food security, economic prosperity, and sustainable livelihoods for generations to come.

National Fisheries Authority

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