National Fisheries Authority

JAMAICA FISHERIES:

Quarterly Statistics Report

Volume 4: Issue 3

OCTOBER – DECEMBER 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.

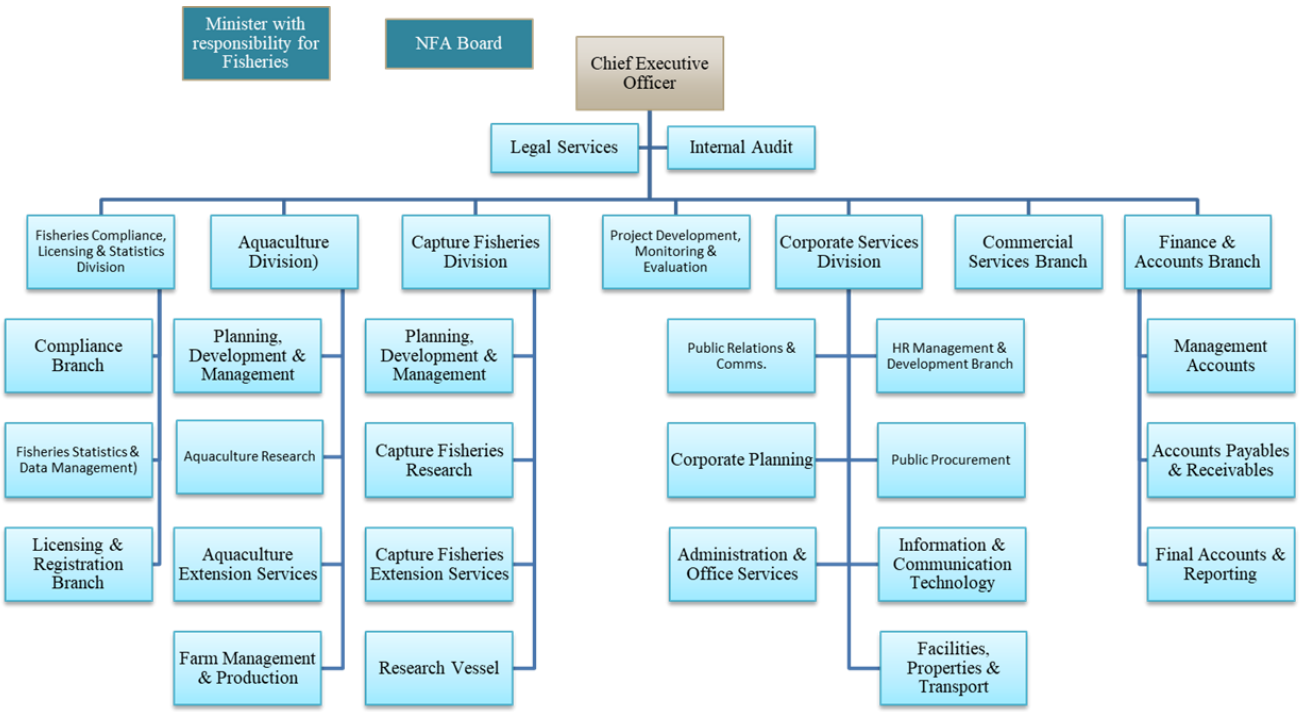

Photo 1: Picture of the *Holothuria mexicana* (Caribbean Sea cucumber) in shallow Jamaican marine waters, shown on sandy and reef-associated habitats.

CEO's Message

Good day, colleagues, partners, fishers, and members of the fisheries community. I am pleased to present the Q3 FY2025/26 results and the wider January to December 2025 performance picture. This quarter was shaped by Hurricane Melissa in October 2025, and I want to begin by recognizing the resilience of our fishers, our coastal communities, and the staff of the National Fisheries Authority, who continued to serve the sector under challenging conditions.

The numbers show both disruption and recovery. Marine production for Q3 reached 3,618.71 metric tons, valued at approximately US$52.83 million, with finfish contributing 3,486.06 metric tons. While finfish production was 12.4% below the same quarter last year, it was also 26.1% higher than Q2, showing that the sector regained momentum after the initial shock. November was the strongest month for both volume and value, following a difficult October affected by the hurricane. Licensing also demonstrated resilience: 2,055 fisher licences were issued or renewed, and renewals represented 77% of the quarter, confirming that our existing fisher base remains committed to operating within the formal system.

At the annual level, fishing GDP stood at US$193.24 million in 2025, down 6.9% from 2024, and fishing contributed 0.87% of total GDP. This decline must be understood in the context of storm-related disruption to fishing effort, landing sites, transport, cold storage, and market access. At the same time, fishing GDP remained above the levels recorded between 2018 and 2022, demonstrating that the sector still has a stronger output base than in earlier years. Our priority now is to strengthen recovery, protect fisher livelihoods, rebuild productive capacity, and deepen the use of data, technology, compliance, and science in decision-making.

I thank our fishers, aquaculture farmers, compliance officers, licensing teams, data collectors, and partner agencies for their dedication. The results remind us that Jamaica's fisheries sector is productive, essential, and resilient, but also increasingly exposed to climate shocks. The NFA remains committed to sustainable fisheries management, improved service delivery, and the long-term development of a sector that supports food security, livelihoods, and national economic growth.

Dr Gavin Bellamy JP
Chief Executive Officer

Principal Director's Message

Good day, everyone. The Q3 FY2025/26 results provide a clear view of the operational realities faced by the units under my purview during October to December 2025. Hurricane Melissa created real constraints in October, particularly for field operations, licensing excursions, landing-site activity, compliance monitoring, and access to fishing communities. Despite those challenges, our teams continued to deliver important results across licensing, compliance, production monitoring, aquaculture support, and biological data collection.

In licensing, 2,055 fisher licences were processed during the quarter, with 1,582 renewals and 473 new licences. Renewals accounted for 77% of activity, showing strong continuity among existing fishers. Vessel licensing was more affected, declining to 358 licences, compared with 593 in the same quarter last year, and total vessel activity fell by about 25% compared with Q2. This reduction reflects the practical impact of Hurricane Melissa on fisher availability, vessel access, verification, and administrative outreach. Compliance site visits also moved from 2,314 in Q2 to 1,451 in Q3, but importantly, this was still slightly above the Q3 level recorded in the previous year, which speaks to the commitment of the Compliance Unit.

On production and technical work, Q3 was mixed but constructive. Finfish production rose sharply compared with Q2 and remained the main driver of marine output, while lobster activity strengthened after the close season, contributing approximately 132.65 MT and US$2.34 million in value. Aquaculture requires continued attention: tilapia production declined from 169.84 MT in Q1 to 146.21 MT in Q2 and 126.29 MT in Q3, a cumulative decline of approximately 25.6% from Q1 to Q3. However, seedstock and prawn hatchery activities provided encouraging signs for diversification and recovery planning.

The annual picture reinforces the importance of sustained operational discipline. The full-year renewal rate reached 60.42%, the highest in the series, while biological monitoring continued to strengthen the evidence base for lobster and conch management. These achievements show that even in a difficult quarter, our systems continued to function. I commend all teams for their professionalism and encourage continued focus on data quality, timely licensing, strengthened field coverage, post-hurricane recovery support, and practical interventions that help fishers and aquaculture producers return to stable and sustainable production.

Dr Zahra Oliphant (PhD, JP)
Principal Director

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Photo 2: A snorkeler stands in the sea holding a sea cucumber.

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.

Q3 2025/26 AT A GLANCE

***3,618.71** TONNES – ** MARINE

126.29 TONNES – AQUACULTURE

9,876 LOBSTER BIOLOGICAL SAMPLES

6,079 CONCH BIOLOGICAL SAMPLES

473 NEW FISHER LICENCE ISSUED

1,582 RENEWED FISHER LICENCE

69% FISHER LICENCE RENEWAL RATE

PRODUCTION VALUE

USD 1.1M – AQUACULTURE

USD 52.8M – ** MARINE

USD 53.9M – TOTAL

6 JOINT OPERATIONS (JDF&JCF)

1,451 SITE VISITS EXECUTED

38 INSPECTIONS EXECUTED

260.23 lbs PRODUCTS SEIZED

1,874 MALE FISHERS LICENSED

181 FEMALE FISHERS LICENSED

178 LANDING SITES VISITED

210 AQUACULTURE FARM VISITS

7 IN-FIELD LICENSING SESSION

3,000+ IRIE FINS USERS

4,783 INSTAGRAM FOLLOWERS

3,500+ FACEBOOK FOLLOWERS

2,500+ TIKTOK FOLLOWERS

150+ X (Formerly Twitter)

66 NEW VESSEL LICENCES ISSUED

292 RENEWED VESSEL LICENCES

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

* Preliminary estimate – subject to change

NFA SEA CUCUMBER FIELD ACTIVITIES

REGULATORY PERFORMANCE OVERVIEW

IrieFINS

Fishing Vessels

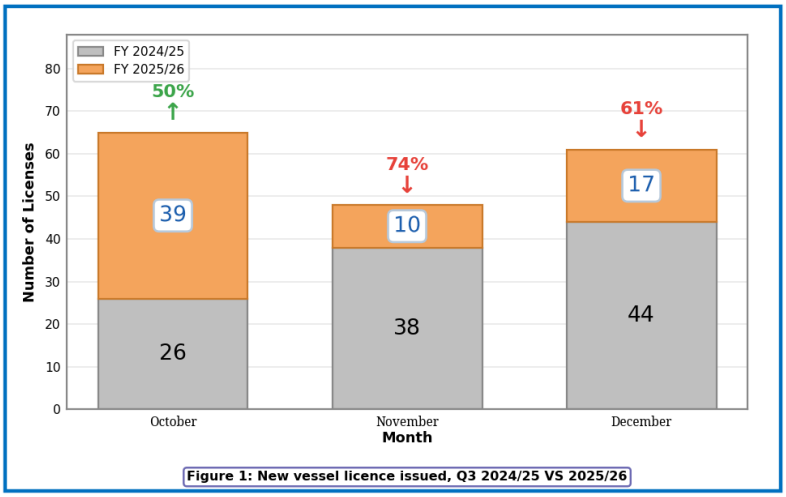


Figure 1: New vessel licence issued, Q3 2024/25 VS 2025/26

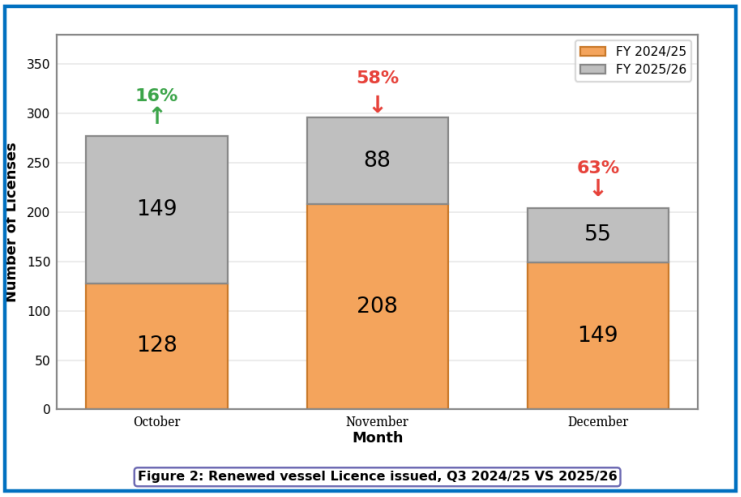


Figure 2: Renewed vessel Licence issued, Q3 2024/25 VS 2025/26

During the third quarter, total vessel licence activity declined from 593 licences in FY 2024/25 to 358 licences in FY 2025/26, representing an overall reduction of approximately 40%. This contraction was observed across both new and renewed vessel licences, indicating a broad slowdown in licensing activity during the quarter. New vessel licences fell from 108 to 66, while renewals decreased from 485 to 292, with renewals continuing to account for the majority of licensing transactions. The decline in Q3 should be interpreted in the context of Hurricane Melissa's passage in October 2025, which affected the western region of the island and where the majority of vessels were damaged.

Vessel licence performance in Q3 FY 2025/26 showed a clear shift from a relatively strong start in October to a marked slowdown in November and December. For new vessel licences, October increased from 26 in FY 2024/25 to 39 in FY 2025/26, representing a 50% improvement. Renewals also improved in October, rising from 128 to 149 licences, or approximately 16%. However, this early gain was not sustained across the rest of the quarter. New licences declined sharply in November from 38 to 10, before remaining below the previous year's level in December at 17 compared with 44. Renewals followed a similar pattern, falling from 208 to 88 in November and from 149 to 55 in December. As a result, both new and renewed vessel licence categories recorded substantial year-on-year contractions after October, indicating that the overall quarterly performance was weakened by the steep fall-off in activity during the final two months of the period.

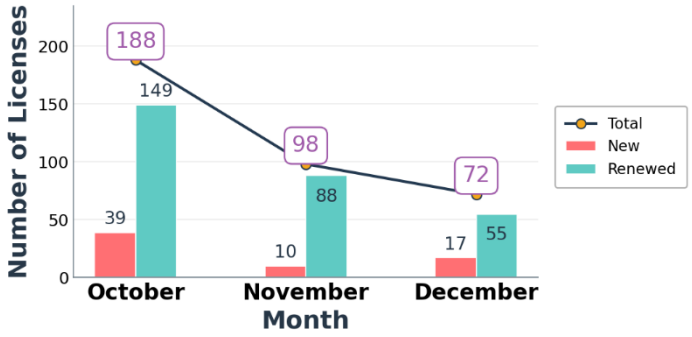
The same trend is reflected in the quarter-on-quarter comparison. Total vessel licences declined from 478 in Q2 to 358 in Q3, a reduction of 120 licences, or approximately 25%. This decrease was evident across both operating categories, with new vessel licences falling from 90 to 66 and renewed vessel licences decreasing from 388 to 292. Although Q3 began with positive year-on-year movements in October, the cumulative effect of the November and December reductions outweighed the early improvement. The data therefore point to a quarter characterized by initial resilience followed by a broad-based contraction in vessel licensing performance.

The most likely explanation for this decline is the severe impact of Hurricane Melissa on the fishing fleet, particularly the catastrophic damage sustained by vessels in affected areas. The reduction in licensing performance should therefore be understood less as a consequence of reduced licensing sessions or field excursions, and more as a reflection of the disruption experienced by individual vessel owners and operators. Since vessel licensing is largely driven by the readiness and ability of individual fishers to renew or register their vessels, widespread vessel damage, loss of operational capacity, repair needs, and uncertainty following the hurricane would have directly reduced the number of fishers in a position to complete licensing transactions. In this context, the sharp declines in November and December suggest that post-hurricane recovery conditions, rather than routine administrative outreach, were the main factor constraining vessel licence activity during the latter part of Q3.

	OCTOBER	NOVEMBER	DECEMBER	TOTAL
ARTISANAL	168	90	62	**320**
INDUSTRIAL	4	1	4	**9**
RECREATIONAL	11	6	5	**22**
SPORTS CHARTER	5	1	1	**7**
TOTAL	**188**	**98**	**72**	**358**

Table 1: NUMBER OF BOAT LICENCES ISSUED BY CATEGORY, OCTOBER TO DECEMBER 2025.

Figure 3: Vessel Licenses Issued per Month (October - December 2025)



Vessel licensing activity for the third quarter, covering October to December 2025, totalled 358 licences. The monthly pattern shows that licensing activity was strongest in October, when 188 licences were issued, then fell to 98 in November and 72 in December. This represents a decline of 47.9% from October to November and a further decline of 26.5% from November to December. Overall, monthly licensing activity fell by 61.7% between October and December.

The decline should be interpreted within the wider operating context of Hurricane Melissa, which affected western Jamaica in October 2025 and likely disrupted fishing operations, vessel access, field verification activities, and administrative processing in affected areas. Although October still accounted for the largest share of quarterly licensing activity at 52.5%, the subsequent fall in November and December suggests that post-hurricane disruption may have constrained renewal activity and delayed new licence applications. Renewals remained the dominant component of licensing during the quarter, with 292 renewed licences, or 81.6% of the quarterly total, compared with 66 new licences, or 18.4%.

By category, the Q3 licensing profile was concentrated mainly in the artisanal fleet, which accounted for 320 of the 358 vessel licences issued, or approximately 89.4% of total activity. Recreational licences represented a much smaller share, with 22 licences or 6.1%, while industrial and sports charter licences accounted for 9 licences and 7 licences, respectively. This distribution shows that artisanal vessels made up the largest share of licences processed during the quarter. However, the category breakdown should be interpreted as a description of the licensing composition rather than definitive evidence that overall performance changes were driven only by the artisanal category. The overall quarterly trend would also have been influenced by broader post-hurricane conditions affecting vessel owners' ability to repair, operate, renew, or register vessels across categories.

The monthly category distribution further reinforces the concentration of activity in October. Artisanal licences decreased from 168 in October to 90 in November and 62 in December, mirroring the broader quarterly decline. Industrial licensing remained low but relatively stable in absolute terms, with 4 licences in October, 1 in November, and 4 in December. Recreational licences declined from 11 in October to 6 in November and 5 in December, while sports charter licences fell from 5 in October to 1 in each of the following two months. Overall, the Q3 data points to a quarter in which vessel licensing remained heavily artisanal and renewal-based but was marked by a substantial month-to-month reduction following the disruption associated with Hurricane Melissa.

Application for Fishing Vessel Licence

Fisher Licences

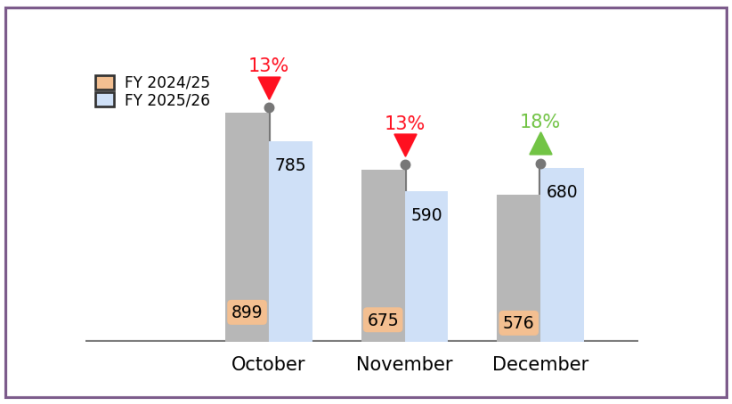


Figure 4: The total number of Fisher licences issued YOY, Q3 - FY 25/26 vs FY 24/25.

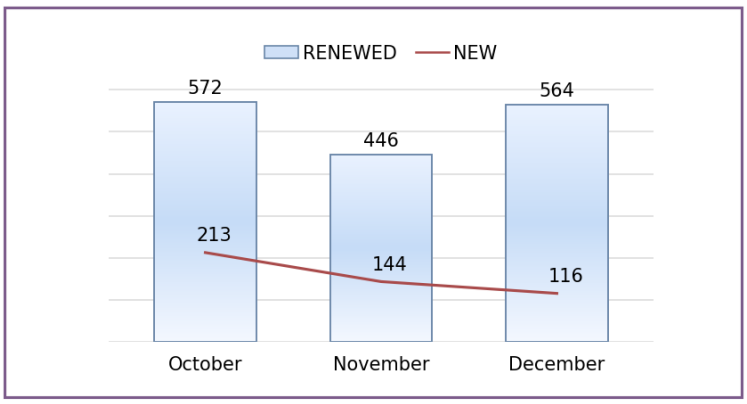


Figure 5: The number of Fisher licences issued new and renewed in Q3 - FY 25/26.

Figure 4 represents the total number of individual fisher licences issued in Q3, covering October to December, with FY 2024/25 shown in orange and FY 2025/26 shown in blue. Overall, the quarter recorded a 4.4% year-over-year decline, falling from 2,150 licences in FY 2024/25 to 2,055 licences in FY 2025/26. This decline was concentrated in the first two months of the quarter, with October decreasing by 12.7%, from 899 to 785 licences, and November decreasing by 12.6%, from 675 to 590 licences. December, however, showed a notable recovery, increasing by 18.1%, from 576 to 680 licences.

The Q3 pattern suggests that vessel licensing activity was affected by a combination of post-hurricane disruption and the moratorium on fishing activities during the quarter. Following Hurricane Melissa, catastrophic vessel damage, interruptions to fishing operations, reduced fisher mobility, and the diversion of attention toward recovery would have limited the ability or immediate need for some vessel owners to complete licensing transactions. At the same time, the moratorium may also have contributed to lower licensing activity, as reduced fishing operations would likely have affected the timing and urgency of renewals or new registrations. The quarter should therefore be interpreted not simply as an administrative slowdown, but as a period in which operational, regulatory, and recovery-related factors jointly influenced vessel licensing behaviour. Any improvement later in the period may reflect partial recovery, delayed transactions, and fishers gradually returning to a position where licensing was again relevant or feasible.

Month	FY 2024/25 Total	FY 2025/26 Total	Change	YOY Change
October	899	785	-114	-12.7%
November	675	590	-85	-12.6%
December	576	680	+104	+18.1%
Q3 Total	2,150	2,055	-95	-4.4%

Table 2: Monthly Vessel Licence Performance, Q3 FY 2024/25 and FY 2025/26

Figure 5 compares renewed and new fisher licences issued in Q3 of FY 2025/26. Renewals continued to dominate licensing activity, accounting for 1,582 licences, or 77.0% of the quarterly total. New licences accounted for 473 licences, or 23.0%. This confirms that the existing fisher base remained the primary contributor to licensing activity during the quarter, even as the overall number of licences issued was lower than the previous year.

Renewal activity was strongest in October and December, with 572 renewals in October and 564 renewals in December, compared with 446 renewals in November. New licences declined steadily across the quarter, moving from 213 in October to 144 in November and 116 in December. This pattern indicates that, while existing fishers continued to renew their licences, the entry of new fishers slowed as the quarter progressed. The decline in new licences may also be linked to the post-hurricane operating environment, where uncertainty, recovery needs, and temporary disruption may have discouraged or delayed new applications.

Month	Renewed Licences	New Licences	Monthly Total	Renewal Share	New Share
October	572	213	785	72.9%	27.1%
November	446	144	590	75.6%	24.4%
December	564	116	680	82.9%	17.1%
Q3 Total	1,582	473	2,055	77.0%	23.0%

Table 3: Monthly Vessel Licence Performance, Q3 FY 2025/26

Overall, the updated Q3 data points to a quarter of temporary contraction rather than structural decline. Total fisher licences were lower year-over-year, but the December rebound suggests that licensing activity began to recover toward the end of the period. Renewals remained the strongest and most stable component of licensing, while new licence issuance weakened month by month. When Hurricane Melissa is considered, the Q3 results appear consistent with a sector that experienced short-term disruption but retained a strong underlying base of active licensed fishers.

YEAR	% renewing license from the previous year
2017	
2018	19%
2019	26%
2020	24%
2021	25%
2022	20%
2023	38%
2024	59%
2025	69%
	Average: 35%

Table 4: FISHER & VESSEL LICENCES RENEWAL % ISSUED FROM 2018-2025. (EXCLUDING TEMPORARY PERMITS).

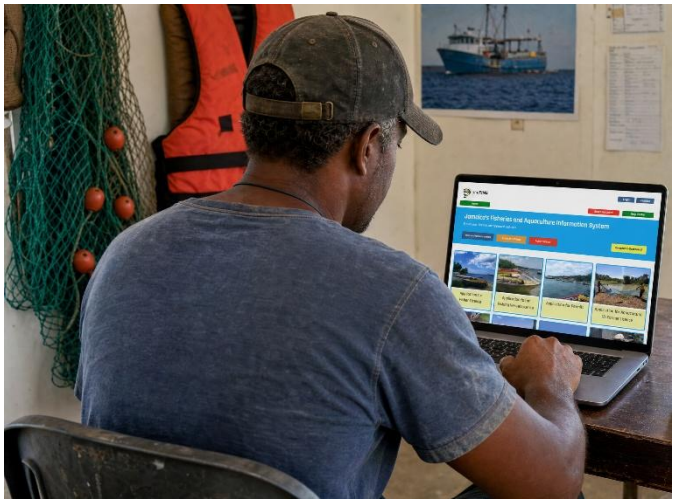


Photo 4: A Jamaican fisher using IrieFINS to complete a fisher licence application.

An analysis of fisher and vessel licence renewal rates, percentage of persons renewing over the previous year from 2018 to 2025, shows two clear phases: a period of modest and fluctuating renewals between 2018 and 2022, followed by a strong and sustained improvement from 2023 onward. Based on the updated table, the average renewal rate across the full 2018–2025 period is 33.93%, with 2025 now reflected as a full-year accounted value of 69%.

From 2018 to 2022, renewal rates remained relatively low and stable, ranging from 19% to 26%. This five-year period averaged approximately 22.8%, indicating a stagnant renewal environment in which fewer than one-quarter of fishers and vessel owners renewed their licences from the previous year. The consistency of these lower rates suggests that, during this period, the licensing system faced persistent challenges in encouraging timely renewal and retaining active licence holders.

The year 2023 marked a major turning point, with the renewal rate increasing to 38%, representing an 18-percentage-point increase over 2022. This improvement was followed by an even stronger performance in 2024, when the renewal rate rose sharply to 59%. The updated 2025 figure of 60.42% shows that the gains achieved in 2024 were not only sustained but slightly exceeded, making 2025 the highest renewal rate recorded in the table.

The revised 2025 figure is particularly important for the Q3 analysis because it removes the earlier partial-year interpretation and confirms that the full-year accounted renewal rate stands at 60.42%. This represents a 1.42-percentage-point increase over 2024, and a 40.42-percentage-point increase compared with 2022.

As a result, the data now points more clearly to a structural improvement in licence renewal behaviour rather than a temporary spike. This strong upward movement may be linked to the introduction and increased use of the IrieFINS online platform, which has likely made the renewal process more accessible, efficient, and convenient for fishers and vessel owners. Other contributing factors may include improved sensitization activities, in-field licensing sessions, stronger compliance monitoring, and greater awareness of the importance of maintaining valid licences. Overall, the sustained high renewal rate in 2024 and 2025 suggests improved compliance, stronger retention of licence holders, more predictable licensing revenue, and a better foundation for regulatory planning and fisheries-sector management.

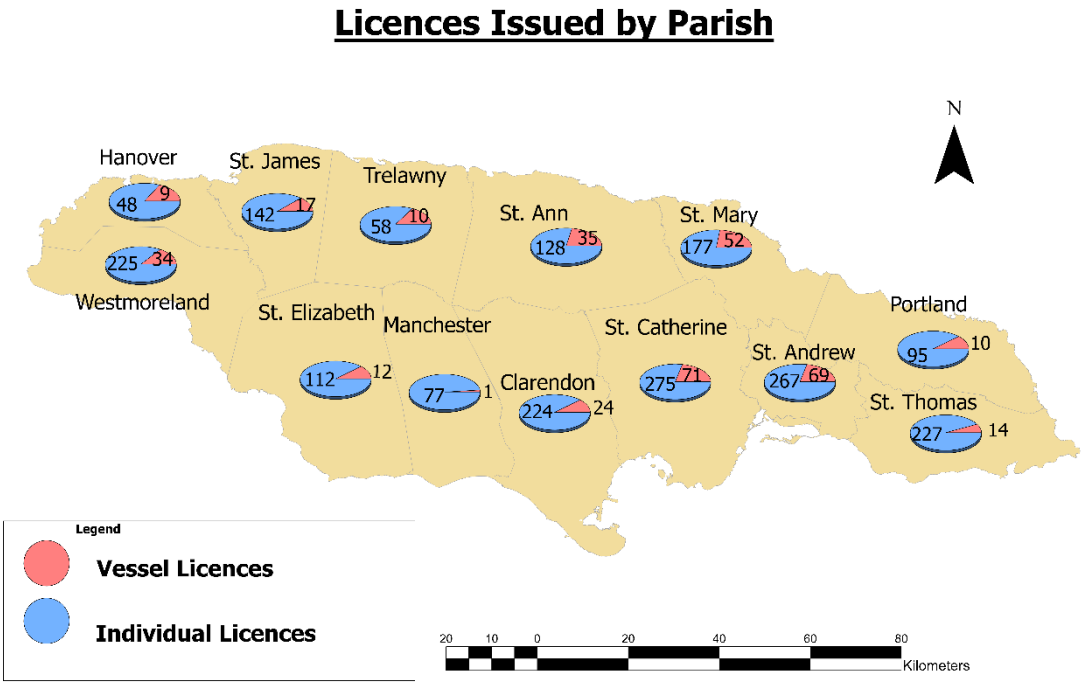


Figure 6: Vessel and Individual Licences issued by parish in Q3

Compliance

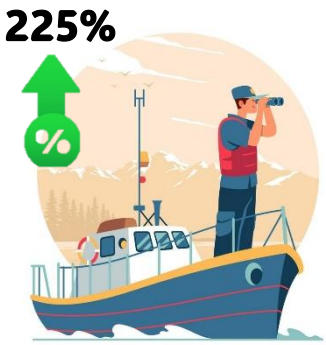


Photo 5: Dedicated sea patrols against the Q3 target.

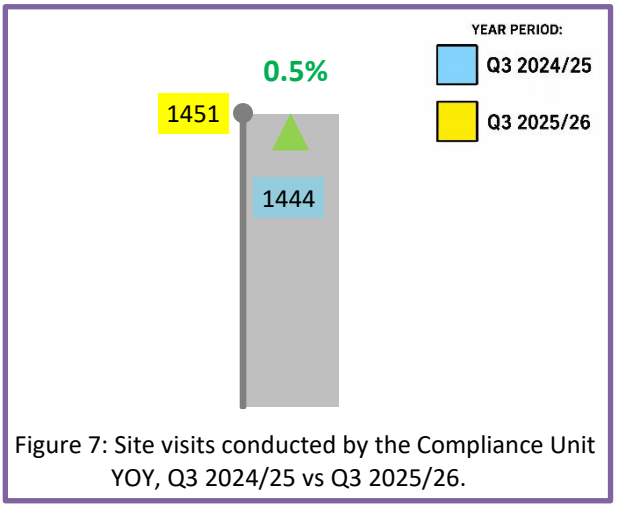


Figure 7: Site visits conducted by the Compliance Unit YOY, Q3 2024/25 vs Q3 2025/26.

40 Compliance Officers Islandwide

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

Table 4: FINES FOR OFFENCES UNDER THE FISHERIES ACT – 2018, FROM 2019 TO 2025.

Fisheries compliance and enforcement activities in the third quarter of FY 2025/26 were affected by Hurricane Melissa in October 2025, which disrupted the field operations of the Compliance Unit at the start of the quarter. As a result, site visits declined from 2,314 in Q2 2025/26 to 1,451 in Q3 2025/26, as the team redirected their efforts to supporting recovery.

Despite this disruption, the Unit still maintained a level of compliance monitoring that was slightly above that of the same quarter of the previous year. Site visits increased from 1,444 in Q3 2024/25 to 1,451 in Q3 2025/26, representing a marginal year-over-year increase of approximately 0.5%. This suggests that, although Hurricane Melissa constrained field activity during Q3, the Compliance Unit was still able to sustain its monitoring efforts at a level comparable to the prior year.

With 40 compliance officers, the Unit conducted an average of approximately 36 site visits per officer during Q3. The results demonstrate the continued commitment of the Compliance Unit to enforcing the Fisheries Act and its regulations, even under challenging circumstances. Going forward, it will be important to restore the stronger field presence achieved in Q2, maintain reliable inspection coverage, strengthen data capture during site visits, and assess whether sustained compliance monitoring contributes to reduced violations and improved long-term sustainability outcomes across the fisheries sector.

Photo 6: Members of the Compliance team conducting an inspection exercise.

Photo 7: Local Fishers participate in the NFA “Safety at sea” program.

NFA Post-Hurricane Melissa
Recovery Response in Action

Relief supplies • gear replacement • cold-chain support • outreach • logistics • vessels • infrastructure

RECOVERY FIELD RESPONSE

1

Relief Supply Distribution
Direct support to affected fishing communities

2

Recovery Launch & New Vessels
$180M hurricane recovery phase for next-gen fishers

3

Cold-Chain Support
Coolers and equipment for safe handling

4

Recovery Infrastructure
Facilities and partnership support

5

Fishing Gear Replacement
and gear to restore livelihoods

6

Needs Assessment
communities

7

Community Handovers
On-the-ground recovery item distribution

8

Outreach & Documentation
Records, registration, and fisher engagement

9

Relief Logistics
Loading, transport, and coordinated deliveries

Recovery focus areas captured:

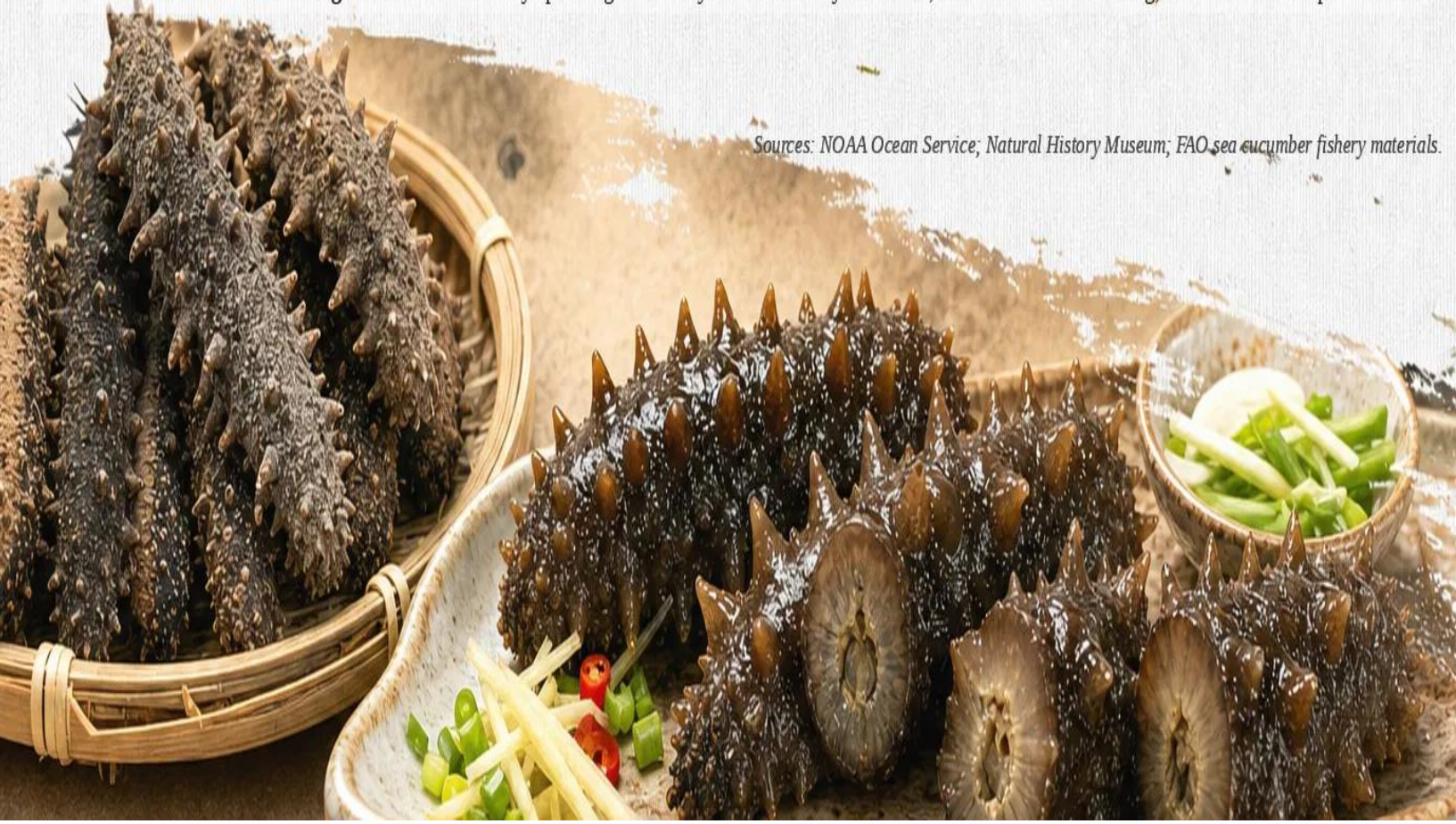
Relief supplies | Cold chain | New vessels | Gear replacement | Field assessments | Community handovers | Logistics | Outreach | Infrastructure

National Fisheries Authority • Post-Hurricane Melissa Recovery

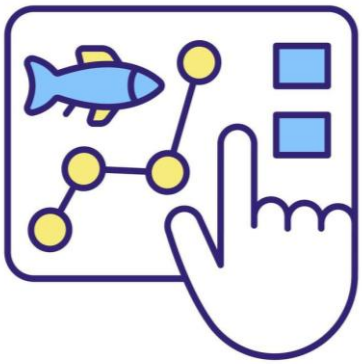
FUN FACTS ABOUT SEA CUCUMBER

1. **Not a Vegetable:** Sea cucumbers are marine animals, not plants; they are echinoderms related to sea stars, sea urchins and sand dollars.
2. **Ocean-Floor Recyclers:** They feed on waste particles, algae, plankton and decaying matter, helping return nutrients to seabed sediments.
3. **Over 1,000 Species:** They live in salt water worldwide, from shallow reefs and seagrass beds to the deep sea.
4. **Tube Feet for Moving:** Many species crawl slowly using rows of tiny tube feet powered by their internal water-vascular system.
5. **Tentacles Around the Mouth:** Modified tube feet near the mouth gather sand, mud or drifting food and pass it inward for feeding.
6. **Built-In Defense:** Some species eject sticky threads or internal organs to confuse predators, then later regenerate lost tissues.
7. **They Breathe Differently:** Many sea cucumbers draw water through the rear opening into respiratory trees that exchange oxygen.
8. **Habitat Helpers:** By mixing and cleaning sediments, they support healthier seafloor habitats for other marine life.
9. **A Prized Seafood Product:** Dried sea cucumber, called beche-de-mer or trepang, is valued in many Asian cuisines and seafood markets.
10. **Needs Sustainable Management:** Because many species grow slowly and are heavily harvested, fisheries need monitoring, size limits and responsible trade.

Sources: NOAA Ocean Service; Natural History Museum; FAO sea cucumber fishery materials.



FISHERY PRODUCTION STATISTICS



Marine Production

The data collection system for artisanal fisheries is predicated on landings at individual beaches, with the average number of fishing days per month estimated at 20 days. Fishing beaches are sampled in accordance with the annual sampling plan, and the data collected are used to compute production estimates. The artisanal fish production remained diverse during the period under review, with the variety caught remaining generally consistent and including finfish species such as snappers, parrotfish, jacks, grunts, lobster, and conch. Coastal pelagic species, including Sardines (*Sardinella spp.*), Black Jacks (*Caranx lugubris*), and Herring (*Opisthonema oglinum*), continued to account for a significant share of the catch. Snapper also remained one of the most diverse and widely represented food fish groups, with several species identified, including Dog, Glasseye, Grey, Lane, Mutton, Red, Silk, Vermillion, and Yellowtail Snapper.

During the third quarter of FY 2025/26, covering October to December 2025, marine finfish production totalled 3,486.06 metric tons (MT). This represented a 12.4% year-over-year decline when compared with 3,977.28 MT recorded in Q3 FY2024/25. The corresponding estimated value also declined year-over-year, falling from approximately US$57.60 million in Q3 FY2024/25 to US$50.49 million in Q3 FY2025/26. In Jamaican dollar terms, the value decreased from approximately J$9.04 billion to J$7.89 billion over the same period.

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 5: Variety of fish species caught in Q3 within the varied parishes.

The year-over-year decline was influenced by weaker production in two of the three months of the quarter. October 2025 recorded 945.42 MT, down from 1,358.96 MT in October 2024, representing a decline of approximately 30.4%. This reduction coincided with the occurrence of Hurricane Melissa in October 2025, which disrupted fishing activity, beach operations, data collection, and overall field conditions at the start of the quarter. November 2025 showed improvement, rising to 1,534.90 MT from 1,374.56 MT in November 2024, an increase of approximately 11.7%. However, December 2025 declined to 1,005.74 MT, compared with 1,243.76 MT in December 2024, reflecting a decrease of approximately 19.1%.

However, when assessed on a quarter-over-quarter basis, Q3 FY2025/26 showed a strong recovery compared with Q2 FY2025/26. Production increased from 2,764.37 MT in Q2 to 3,486.06 MT in Q3, representing an increase of approximately 26.1%. The estimated USD value similarly rose from US$40.04 million in Q2 to US$50.49 million in Q3, while the estimated JMD value increased from approximately J$6.27 billion to J$7.89 billion. This indicates that, despite the impact of Hurricane Melissa in October and the weaker year-over-year result, the sector performed better than in the immediately preceding quarter.

Overall, Q3 FY2025/26 reflected a mixed performance. The quarter was below the prior year's output, largely due to reduced production in October and December, with October being affected by the disruption associated with Hurricane Melissa. However, the quarter still demonstrated a notable improvement over Q2 FY2025/26, supported by stronger November landings and an overall rebound in quarterly production. The continued diversity of fish varieties caught suggests that the structure of artisanal finfish production remained stable, even though production volumes were affected by weather-related disruption and monthly fluctuations.

		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**	
	October	945.42		3rd Quarter FY25/26	2,139,743,734.45		3rd Quarter FY25/26	13,692,264.05		3rd Quarter FY25/26
	November	1,534.90			3,473,898,011.48			22,229,544.63		
	December	1,005.74	**3,486.06**		2,276,264,372.97	**7,889,906,118.90**		14,565,862.41	**50,487,671.09**	
	TOTAL		**12,717.75**			**28,783,742,547.07**			**184,187,758.98**	

Table 6: ESTIMATED MARINE FINFISH PRODUCTION (MT) AND VALUE (USD), 2025.

Photo 8: Data Collection activities being carried out at a landing site

Fishery	FY 2024/25			FY 2025/26									Total	% Composition
	January	February	March	April	May	June	July	August	September	October	November	December		
Atrisanal finfish	1,404.15	845.61	1,753.81	993.18	791.10	679.47	955.42	736.28	1,072.67	945.42	1,534.90	1,005.74	**12,717.75**	95.34
Sea Cucumber	6.52												**6.52**	0.05
Industrial Conch					48.86	77.1	137.43	91.51					**354.90**	2.66
Industrial Spiny Lobster*	26.33	6.95	48.23				0.00	6.31	39.97	28.24	55.17	49.24	**260.44**	1.95
Total Marine Production	**1437.00**	**852.56**	**1802.04**	**993.18**	**839.96**	**756.57**	**1092.85**	**834.10**	**1112.64**	**973.66**	**1590.07**	**1054.98**	**13,339.61**	**100**

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

Table 7: Marine fish production (MT) trend by fishery type, 2025.

NB: October – December 2025 production figures are preliminary numbers and are subject to change.

For Q3 FY2025/26, October to December, total marine production, including lobster, reached 3,618.71 MT, valued at approximately US$52.83 million. The quarter was affected by Hurricane Melissa in October, which likely disrupted fishing activity, landing operations, transportation, and market access at the start of the period. However, the monthly trend indicates that the sector recovered meaningfully in November, when overall production strengthened after the October shock. This rebound was especially evident in industrial spiny lobster, which rose from 28.24 MT in October to 55.17 MT in November, representing the strongest monthly lobster production recorded for the year. The November improvement therefore suggests that, while the hurricane created immediate operational constraints, key segments of the fishery—particularly lobster—were able to resume activity and capitalize on available fishing and market opportunities once conditions improved. Production eased again in December, but lobster output remained relatively strong at 49.24 MT, indicating that the post-hurricane recovery in this fishery was not limited to a single month, even though broader quarterly performance continued to reflect the combined effects of storm disruption and end-of-period moderation.

The quarter remained heavily driven by artisanal finfish, which produced 3,486.06 MT, representing about 96.3% of total Q3 production. In value terms, finfish generated approximately US$50.49 million, moving from US$13.69 million in October to US$22.23 million in November, before declining to US$14.57 million in December. This shows that November was the strongest month for both volume and value.

Fishery	FY 2024/25			FY 2025/26									Total USD	% Contribution
	January	February	March	April	May	June	July	August	September	October	November	December		
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	13,692,264.05	22,229,544.63	14,565,862.41	$ 184,187,759	95.32
Sea Cucumber	161,052.48												$ 161,052	0.08
Industrial Conch					$ 700,196	$ 1,104,902	$ 1,969,342	$ 1,311,410					$ 5,085,850	2.63
Industrial Spiny Lobster*	$ 210,668	$ 55,607	$ 385,891				$ -	$ 111,220	$ 704,618	$ 497,823	$ 972,554	$ 868,018	$ 3,806,399	1.97
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**	**$14,190,087**	**$23,202,099**	**$15,433,880**	**$ 193,241,060**	**100.00**

Table 8: Marine fish production value by fishery type, 2025.

Industrial spiny lobster made the main contribution among the other species. Lobster production totalled 132.65 MT for the quarter, with landings of 28.24 MT in October, 55.17 MT in November, and 49.24 MT in December. Its value increased from US$497,823 in October to US$972,554 in November, then eased to US$868,018 in December, giving a Q3 lobster value of approximately US$2.34 million. This reflects stronger post-closed-season activity, particularly in November.

Industrial conch and sea cucumber recorded no production in Q3, as the blank spaces in the table reflect the closed season. As a result, neither species contributed to October–December production or value. This highlights the seasonal nature of these fisheries and explains their absence from Q3 output.

Overall, Q3 performance was positive in value terms, rising from US$14.19 million in October to US$23.20 million in November, before falling to US$15.43 million in December. The quarter's movement shows a strong November recovery after the October hurricane disruption, supported mainly by artisanal finfish and improved lobster activity, while conch and sea cucumber remained inactive due to closed-season restrictions.

Photo 9: NFA's Statistical & Data Management new software home page.

Aquaculture Production

During the third quarter of FY 2025/26, tilapia production continued to decline, both when compared with the same quarter of the previous fiscal year and when assessed against the immediately preceding quarter. Total production for Q3 FY2025/26 was estimated at 126.29 metric tons (MT), compared with 145.61 MT in Q3 FY2024/25. This represented a year-over-year decline of 13.3%, or 19.32 MT. The fall in output indicates that the downturn observed in Q2 did not stabilize in Q3 but instead continued into the October–December period.

Metric	Q3 FY 2024/25	Q3 FY 2025/26	Change	% Change
Production (MT)	145.61	126.29	-19.32	-13.3%
Value (USD)	$1,239,578	$1,152,901	-$86,677	-7.0%
Price/MT (USD)	$8,513	$9,129	+$616	+7.2%

Table 9: Aquaculture Production Performance, Q3 FY 2024/25 and Q3 FY 2025/26

The performance of the quarter was also affected by Hurricane Melissa, which impacted the sector in October 2025. The hurricane disrupted farm operations, harvesting schedules, transportation, market access, and general production activity at the start of the quarter. Although October still accounted for the largest share of Q3 output, the wider effects of the hurricane may have contributed to instability across the period and placed additional pressure on farmers.

Photo 10: News headline regarding the monetary estimated damage caused by Hurricane Melissa.

Although the estimated price per MT increased by 7.2% year-over-year, from approximately US$8,513/MT in Q3 FY2024/25 to US$9,129/MT in Q3 FY2025/26, the increase in unit price could not compensate for the decline in production volume. Tilapia production fell by 13.3%, from 145.61 MT to 126.29 MT, and this volume contraction had the stronger effect on overall performance. Consequently, the total estimated value of production declined from US$1,239,578 to US$1,152,901, representing a 7.0% decrease or an estimated reduction of US$86,677. The result shows that while higher prices moderated the scale of the revenue loss, price gains cannot offset reduced production volume when output declines sharply. Overall earnings therefore remained lower because the sector had fewer metric tonnes available for sale, despite receiving a higher estimated return per MT.

Metric	Q2 FY 2025/26	Q3 FY 2025/26	Change	% Change
Production (MT)	146.21	126.29	-19.92	-13.6%
Value (USD)	$1,334,741	$1,152,901	-$181,840	-13.6%
Price/MT (USD)	$9,129	$9,129	$0	0.0%

Table 10: Aquaculture Production Performance, Q2 FY 2025/26 and Q3 FY 2025/26

The quarter-over-quarter trend also points to continued weakening in production. Compared with Q2 FY2025/26, when production stood at 146.21 MT, Q3 output fell by 19.92 MT to 126.29 MT, representing a further 13.6% decline. Since the estimated price per MT remained unchanged at approximately US$9,129/MT between Q2 and Q3, the fall in production translated almost directly into a similar decline in value. Estimated production value decreased from US$1,334,741 in Q2 to US$1,152,901 in Q3, also reflecting a 13.6% quarter-over-quarter decrease.

		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	
	October	55.71		3rd	79,845,895.91		3rd	508,572.59		3rd Quarter FY25/26
	November	41.95		Quarter	60,124,489.92		Quarter	382,958.53		
	December	28.63	126.29	FY25/26	41,033,710.28	181,004,096.11	FY25/26	261,370.29	1,152,901.41	
	TOTAL		585.69			839,360,831.11			5,346,256.41	

Table 11: ESTIMATED TILAPIA PRODUCTION (MT) AND VALUE (USD), 2025.

Monthly estimates show that production was highest in October, at 55.71 MT, accounting for approximately 44.1% of Q3 output. November followed with 41.95 MT, representing about 33.2% of the quarter's production, while December recorded the lowest monthly output at 28.63 MT, or approximately 22.7% of the quarterly total. The associated estimated USD values were US$508,572.59 in October, US$382,958.53 in November, and US$261,370.29 in December.

Overall, the Q3 performance confirms a continuing downward trend in tilapia production during FY2025/26. After declining from 169.84 MT in Q1 to 146.21 MT in Q2, production fell further to 126.29 MT in Q3. This represents a cumulative decline of approximately 25.6% from Q1 to Q3. While prices remained relatively strong and stable at around US$9,129/MT, the sustained reduction in production volume remained the dominant factor affecting performance. Consequently, the sector's estimated value also weakened over the period, falling from US$1.55 million in Q1 to US$1.33 million in Q2, and then to US$1.15 million in Q3. The data therefore indicate that price stability provided some support, but continued production losses, compounded by the impact of Hurricane Melissa in October 2025, drove the overall decline in tilapia output and value during the fiscal year to date.

Photo 11: Local Fish Farmer receiving relief supplies from NFA's Aquaculture team.

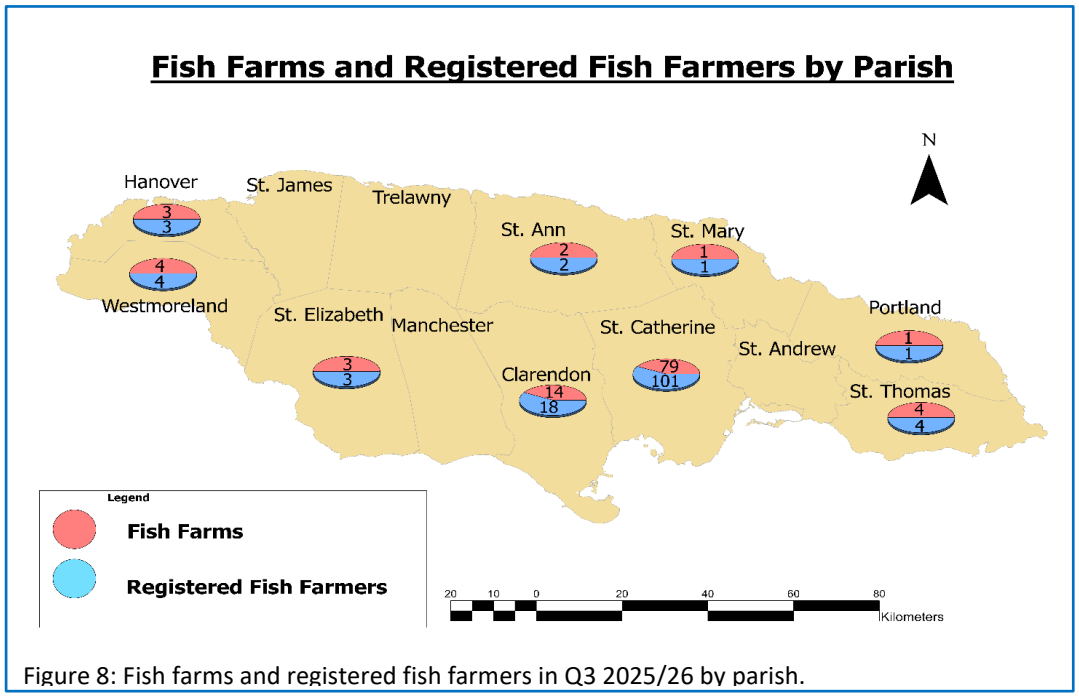


Figure 8: Fish farms and registered fish farmers in Q3 2025/26 by parish.

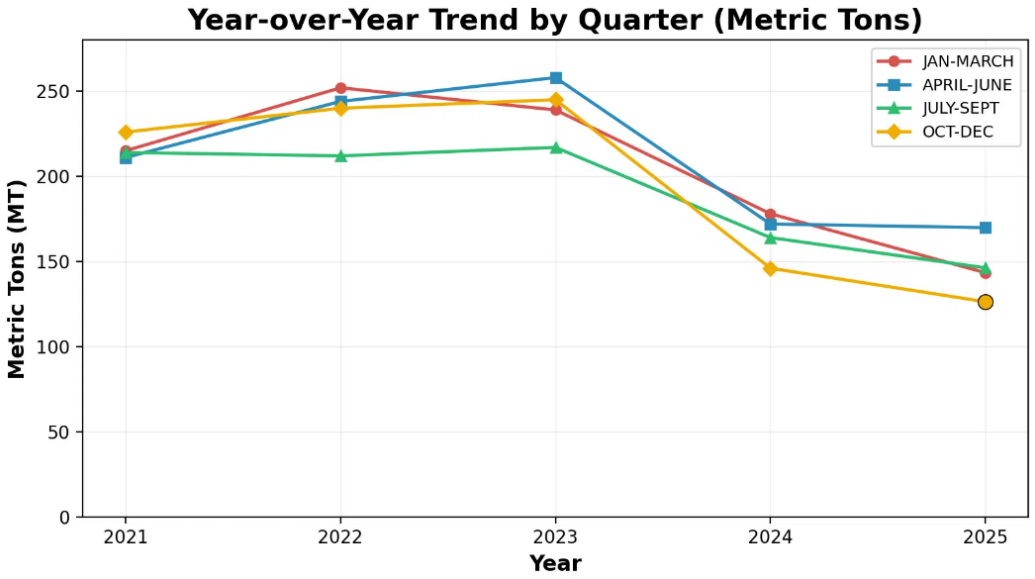


Figure 9: Aquaculture year-over-year trend by quarter, 2021 to 2025.

Photo 12: Members of the Licensing and Registration team, conducting an in-field licensing excursion.

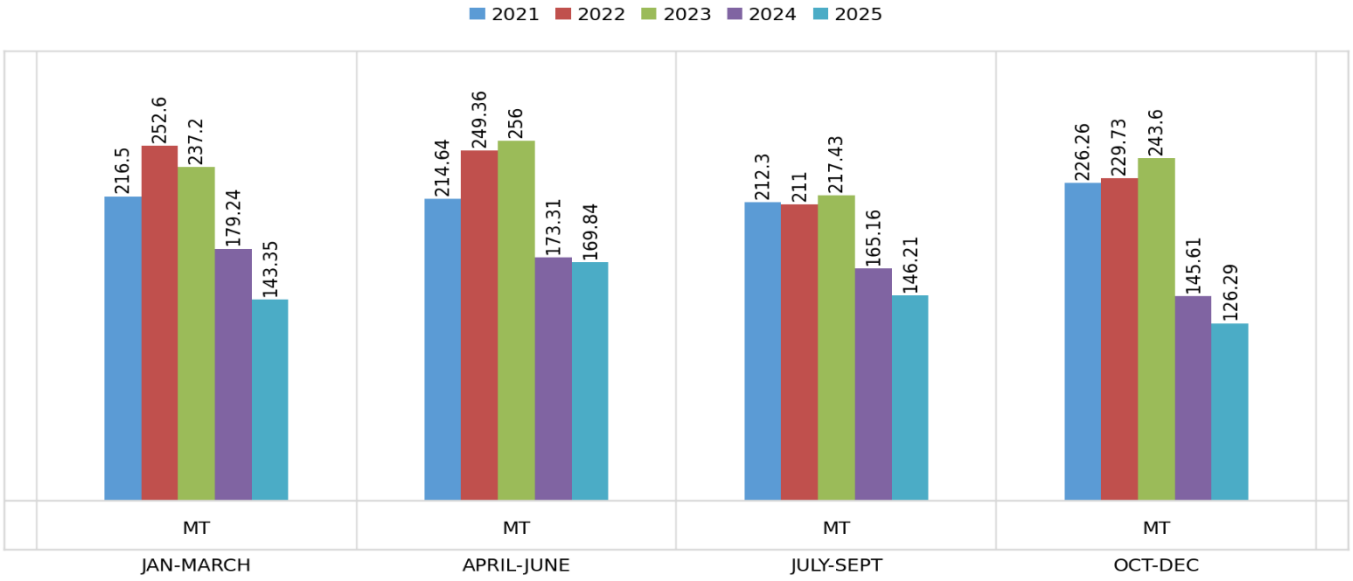
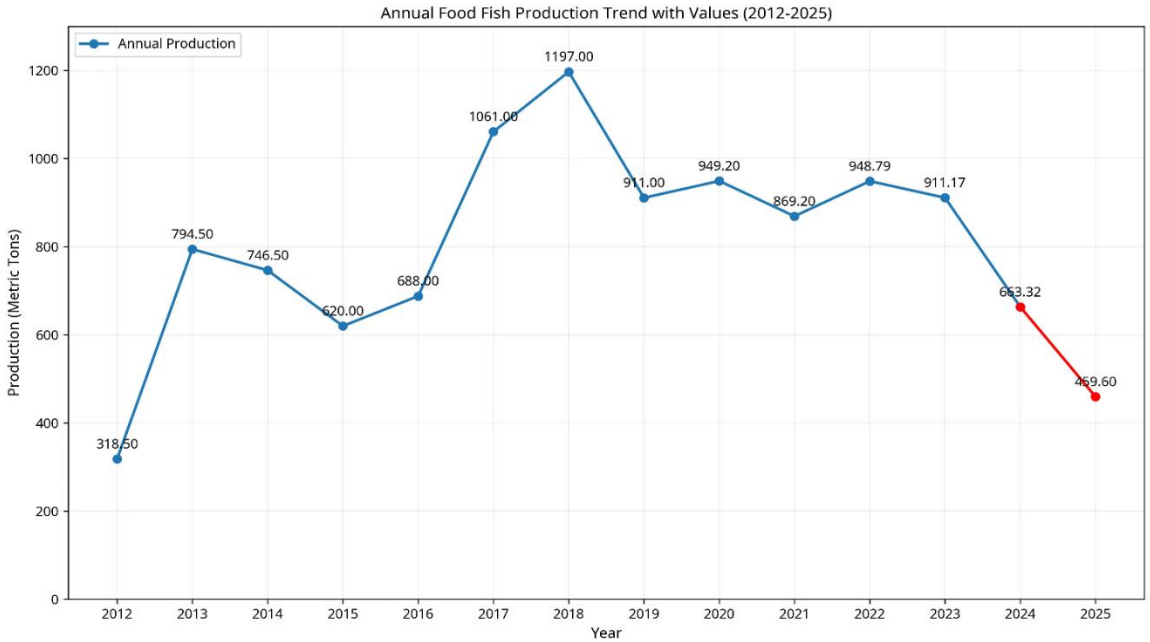


Figure 10: Aquaculture tilapia quarterly production, 2021 to 2025.

A review of quarterly aquaculture fish production from 2021 to 2025 shows that the sector experienced strong performance in 2022 and 2023, followed by a sustained decline in 2024 and 2025. Production peaked in several quarters during 2023, including April–June at 256.00 MT and October–December at 243.60 MT.

The updated 2025 data confirm that the contraction continued throughout the year. Output fell to 143.35 MT in January–March, 169.84 MT in April–June, 146.21 MT in July–September, and 126.29 MT in October–December. The October–December quarter is now completed and shows a further decline from 145.61 MT in 2024 to 126.29 MT in 2025, representing a 13.3% decrease.

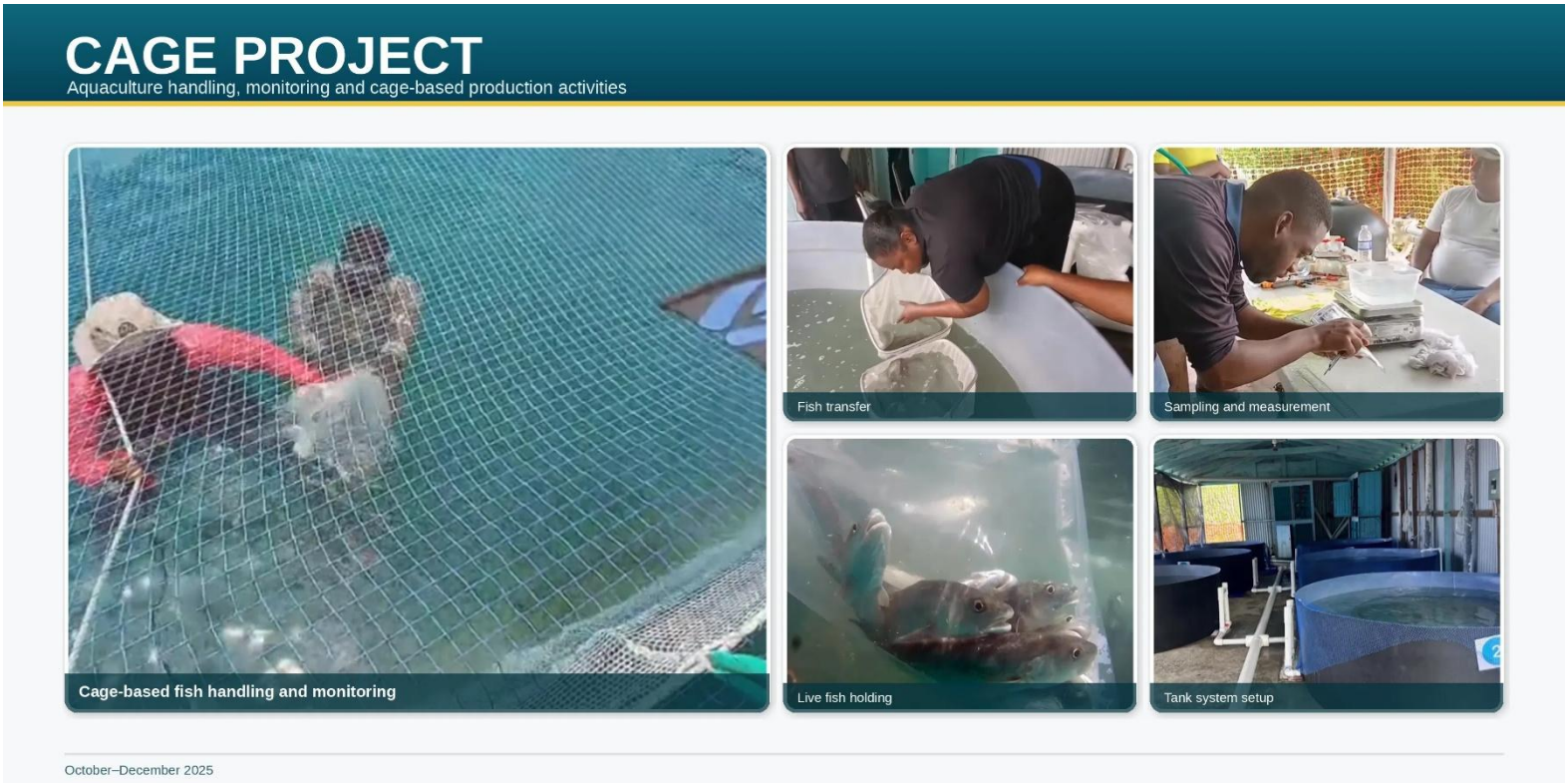
Overall, total aquaculture production across the four quarters declined from 663.32 MT in 2024 to 585.69 MT in 2025, a reduction of approximately 11.7%. Compared with the stronger 2023 performance of 954.23 MT, 2025 production was down by about 38.6%. This indicates that aquaculture production has not yet recovered from the sharp downturn that began after 2023, with the weakest performance in 2025 occurring in the October–December quarter.



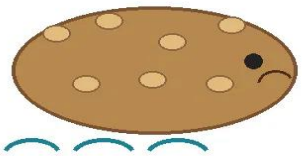
Operational pond capacity remained relatively stable but slightly below the quarterly benchmark. A total of 547.6 acres of aquaculture ponds were reported in production during October–December 2025, compared with the quarterly target of 580 acres. This reflects an achievement rate of 94.4%, or a shortfall of approximately 5.6%, suggesting that the sector retained most of its productive base despite the hurricane-related pressures experienced at the start of the quarter.

Seedstock performance was stronger. Tilapia seedstock production reached 56,723, exceeding the revised quarterly target of 30,000 by approximately 89.1%. Freshwater prawn hatchery activity also continued under the production trial phase, with 193,000 post-larvae produced during the quarter and 72,302 post-larvae sold. In addition, cumulative outputs to date included 386,094 post-larvae produced, 136,242 sold, and 24,000 post-larvae distributed to six farmers for trial, while 213.4 lbs of adult prawns were reaped from trial ponds at the Aquaculture Division.

Overall, the October–December 2025 quarter reflected a mixed but constructive performance. Production and pond acreage remained below target, and no new pond renovations were completed during the quarter; however, seedstock production and prawn hatchery trials showed continued progress. In the context of Hurricane Melissa's October 2025 disruption, these results indicate that the Aquaculture Division continued to support sector recovery by maintaining production capacity, advancing seed supply, and sustaining diversification work needed for the medium-term rebound of Jamaica's aquaculture sector.



EXPORT FACTS ABOUT SEA CUCUMBER



Jamaica Sea Cucumber Export Information

Overview

Reported sea cucumber export quantities show a highly variable but generally declining trend over the 2017–2026 period. Exports peaked in 2018 at 26,341 kg, then contracted sharply in the years that followed. After a temporary recovery in 2024 to 7,125 kg, the reported quantity declined to 2,700 kg in 2025 and 850 kg in 2026.

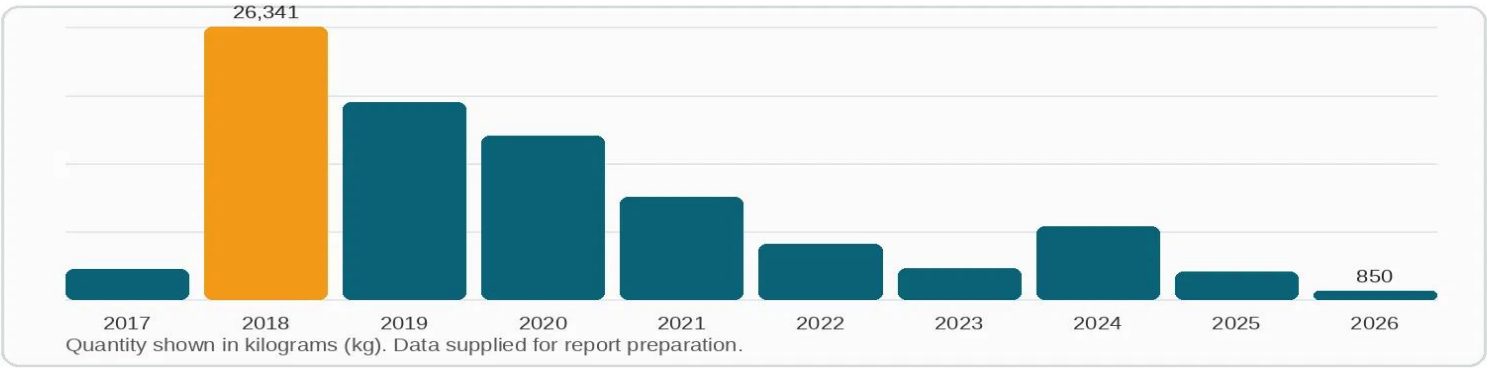
Peak Export Year	2024 Recovery	2026 Reported Volume
2018	**+137.5%**	**850 kg**
26,341 kg	vs. 2023	-68.5% vs. 2025

Sea Cucumber Export Quantity and Value Table

Year	Quantity	Est. Value	Year	Quantity	Est. Value
2017	2,963 kg	US$342,315	**2022**	5,400 kg	US$623,862
2018	26,341 kg	US$3,043,176	**2023**	3,000 kg	US$346,590
2019	19,112 kg	US$2,208,009	**2024**	7,125 kg	US$823,151
2020	15,871 kg	US$1,833,577	**2025**	2,700 kg	US$311,931
2021	9,950 kg	US$1,149,524	**2026**	850 kg	US$98,200

Trend Interpretation

The export series indicates a steep contraction from the 2018 peak to 2026, with reported volume falling by 96.8% over the period. The main exception was 2024, when exports increased from 3,000 kg to 7,125 kg; however, this rebound was not sustained in the following two reported years.

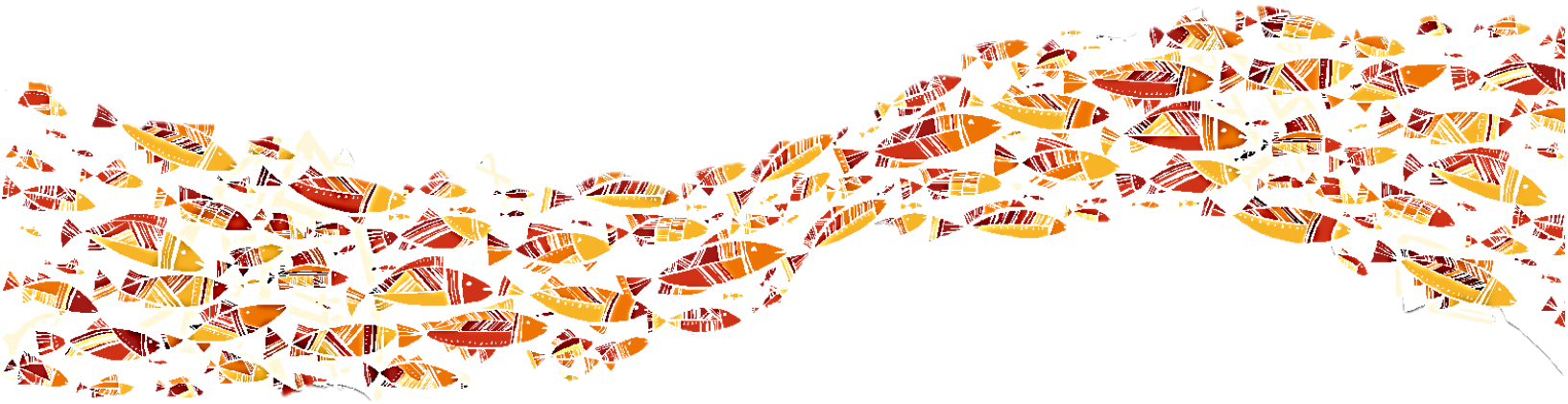


Export Market and Value Basis

Asia is the primary market for Jamaica's sea cucumber exports. The estimated annual values shown in the table use the mean of the 2024 global dried sea cucumber export/import benchmark range, equivalent to US$115.53 per kg. Estimated values are indicative only and may vary by species, grade, processing form, moisture content, buyer specification, and destination market.

Prepared for quarterly fisheries reporting | Sea cucumber export quantities, 2017–2026

BIOLOGICAL DATA
MARINE SPECIES



BIOLOGICAL ANALYSIS

This section focuses on the biological monitoring results around stock condition, processing indicators, and sector implications for Jamaica's lobster and queen conch fisheries. The analysis uses the biological datasets, the 2021–2025 lobster series and 2025 queen conch records.

Data coverage and analytical focus

Dataset	Clean Records Used	Analytical Role
Whole lobster biological series	6,867	Carapace length, whole weight, sex ratio and annual trends
Lobster tail biological series	9,821	Tail length, tail weight and sex-disaggregated product indicators
Western lobster 2025 site dataset	2,609	Spatial distribution of monitoring records and landing-site concentration
Queen conch 2025 biological dataset	6,079	Sex composition, processed-weight structure and vessel sampling coverage

Whole Lobster Mean Size	Whole Lobster Mean Weight	Conch Samples	Conch Female Share
8.06 cm **mean carapace length**	**623.0 g** **mean whole weight**	**6,079** **2025 biological records**	**54.0%** **sex composition**

Biological screening was applied before tabulation to reduce the influence of obvious unit-entry and data-entry artefacts. Sex-ratio calculations include records coded as male or female only. Statistical comparisons were completed with Welch, two-sample tests, which are appropriate where group variances and sample sizes differ.

Photo 13: Example of a biological sampling of conch.

Lobster Biological Analysis

The lobster data indicate a fishery in which biological condition, product form, and sampling coverage must be interpreted together. Across the whole-lobster series, the mean carapace length was 8.06 cm, and the mean whole weight was 622.98 g. The highest mean whole weight occurred in 2022 at 652.45 g, while the highest mean carapace length occurred in 2021 at 9.22 cm. The 2025 records show a recovery in mean carapace length to 9.01 cm, alongside a mean whole weight of 629.33 g, suggesting that recent samples contained larger-bodied individuals than those recorded in 2023 and 2024.

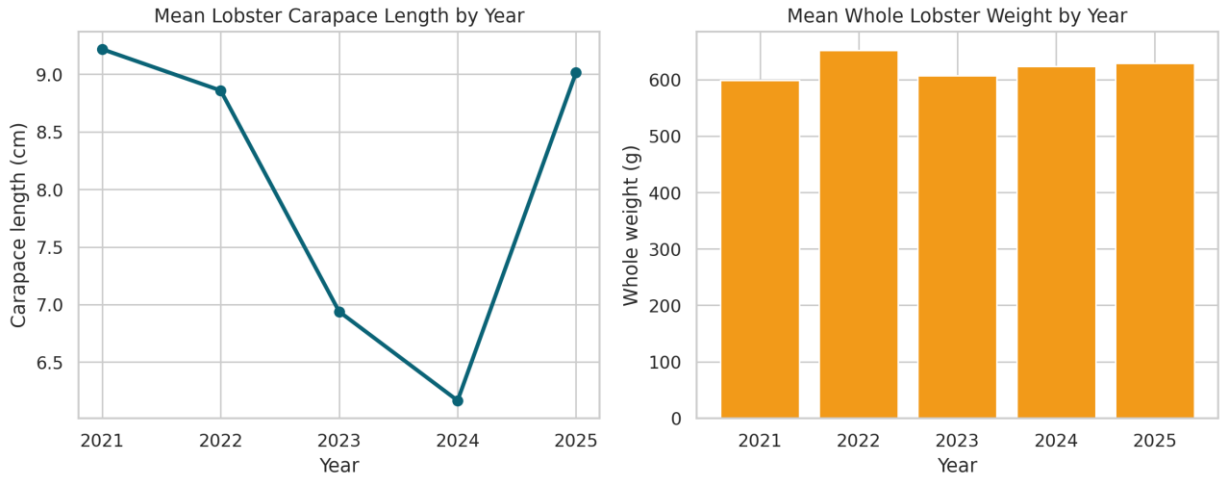


Figure 11. Annual trend in mean lobster carapace length and whole weight, 2021–2025.

Annual biometric pattern

Year	Mean carapace length (cm)	Mean whole weight (g)	Mean tail length (cm)
2021	9.22	598.59	12.95
2022	8.86	652.45	13.44
2023	6.94	606.69	12.16
2024	6.17	623.30	10.73
2025	9.01	629.33	15.42

The shift from lower mean carapace lengths in 2023–2024 to a higher 2025 mean should be monitored carefully. It may reflect changes in fishing grounds, market selectivity, gear targeting, sampling coverage, or a genuine change in the size structure of the sampled component of the stock. For the sector, larger individuals can support higher unit value and stronger export-grade recovery, but only if recruitment and reproductive protection remain adequate.

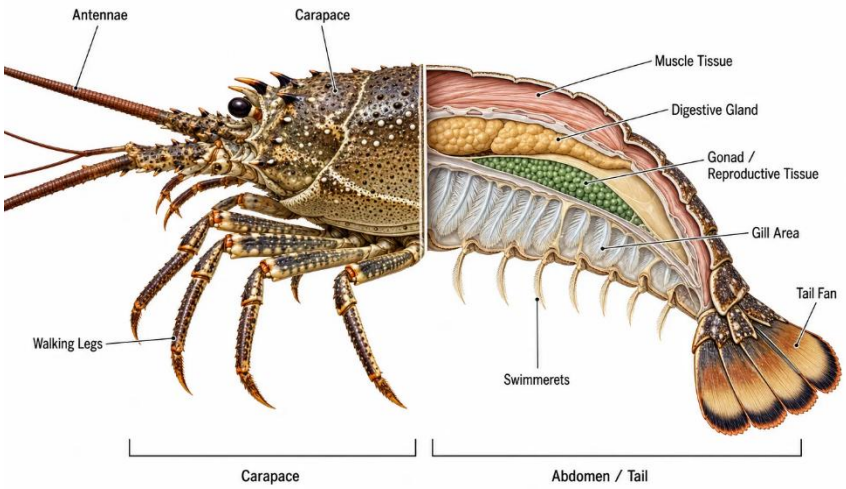


Photo 14: Dissection of an adult lobster.

Lobster Sex Structure, Product Indicators and Sector Impact

Sex-disaggregated results show that male lobsters were heavier and had longer average carapace measurements than females in the whole-lobster dataset. Male mean whole weight was 663.30 g compared with 570.49 g for females, and the statistical difference in whole weight was highly significant (Welch t = 19.67, p < 0.001). This does not necessarily indicate a stock imbalance by itself, but it confirms that sex composition directly affects average weight, product yield, and therefore the commercial profile of landings.

Sex	Mean CL (cm)	Mean whole wt. (g)	Weight records
Female	7.51	570.49	2,701
Male	8.46	663.30	3,543

Year	Female	Male	M:F ratio
2021	694	991	1.43:1
2022	729	1,300	1.78:1
2023	910	1,108	1.22:1
2024	382	141	0.37:1
2025	257	274	1.07:1

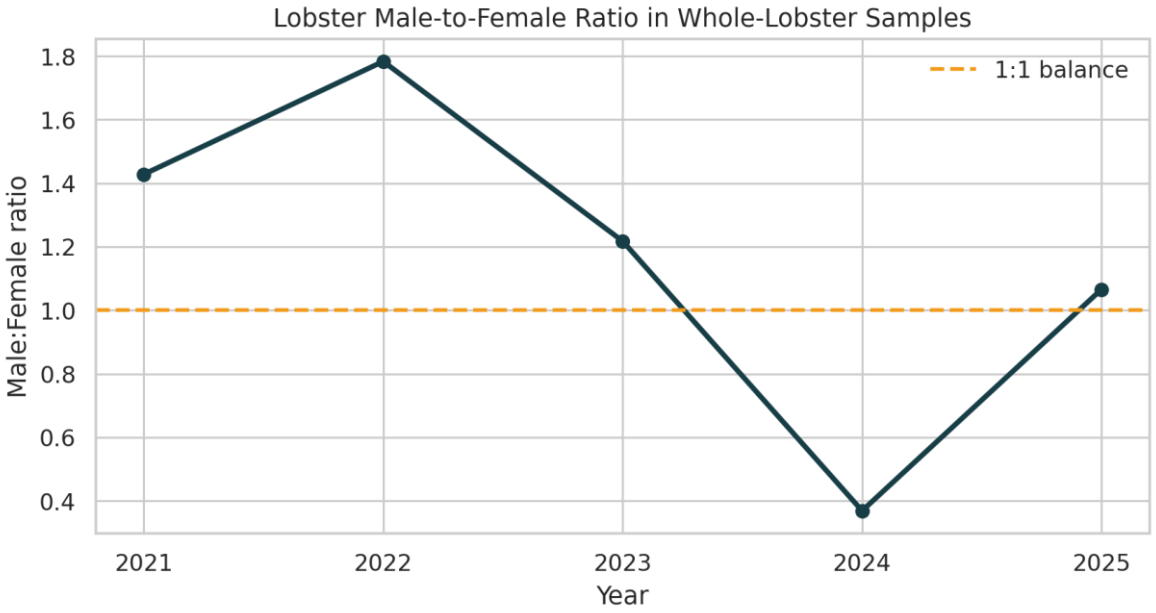


Figure 12. Lobster male-to-female ratio by year, 2021–2025.

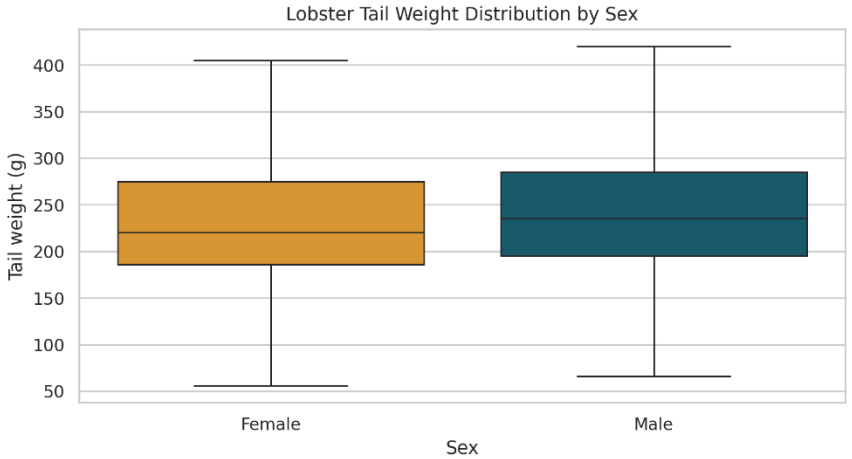


Figure 13. Distribution of lobster tail weights by sex from the tail biological dataset.

The sex ratio moved from male dominance in 2021–2023 to a strongly female-dominated sample in 2024, before returning close to balance in 2025. This volatility highlights the need for consistent field sampling and landing-site coverage so that biological interpretation is not distorted by changes in where and when samples are collected. From a sector perspective, year-to-year changes in sex composition can affect processing yields and the stability of export supply.

The western region of the island (where most of the industrial landing occurs) was concentrated at Cave, which accounted for most records. This concentration is useful for monitoring a major sampling point, but it also means islandwide interpretation should be cautious until coverage is balanced across more landing sites. Current Jamaican lobster management remains strongly linked to closed-season protection, undersized lobster controls, and compliance monitoring. NFA guidance identifies April 1 to June 30 as the annual spiny lobster closed season, protecting the reproductive period and supporting stock replenishment.

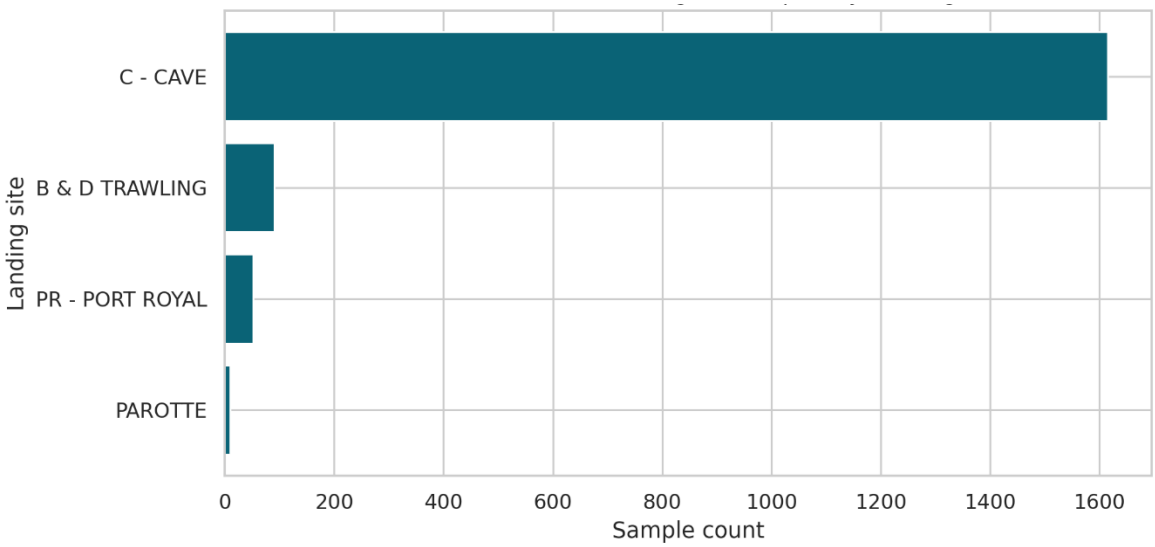


Figure 14. Lobster biological monitoring records by landing site.

Queen Conch Biological Analysis

The 2025 queen conch biological dataset contains 6,079 monitoring records and provides an expanded basis for interpreting sex structure and processed-weight indicators. Females accounted for 3,284 records, or 54.0% of the sample, while males accounted for 2,795 records, or 46.0%. This slightly female-skewed composition remains close enough to parity to suggest continued reproductive representation in the sampled fishery, although spatial and vessel-level sampling patterns must be considered before drawing stock-wide conclusions.

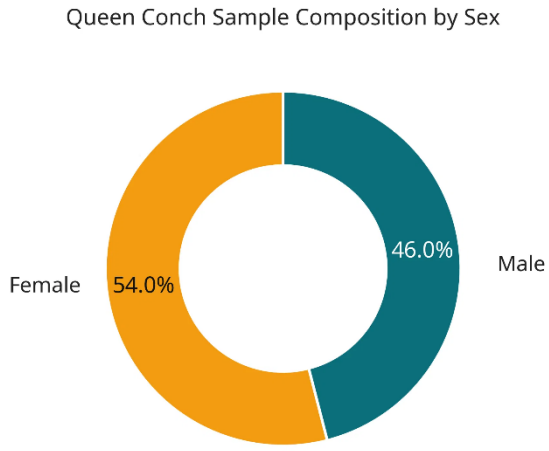


Figure 15. Queen conch sex composition in the 2025 biological dataset.

Processed-weight indicators are central to the conch sector because product form, quota accounting, and export readiness are tied to clean-weight standards. The mean dirty weight across available observations was 139.62 g, while the mean 50% clean weight was 120.64 g. The average processing ratio was 86.43%, indicating that a substantial share of animal weight remained after the 50% cleaning stage in the records where both dirty and clean measurements could be paired.

Sex	Sample count	Mean dirty wt. (g)	Mean 50% clean wt. (g)	Mean processing ratio
Female	3,284	144.44	125.25	86.94%
Male	2,795	133.42	115.20	85.65%

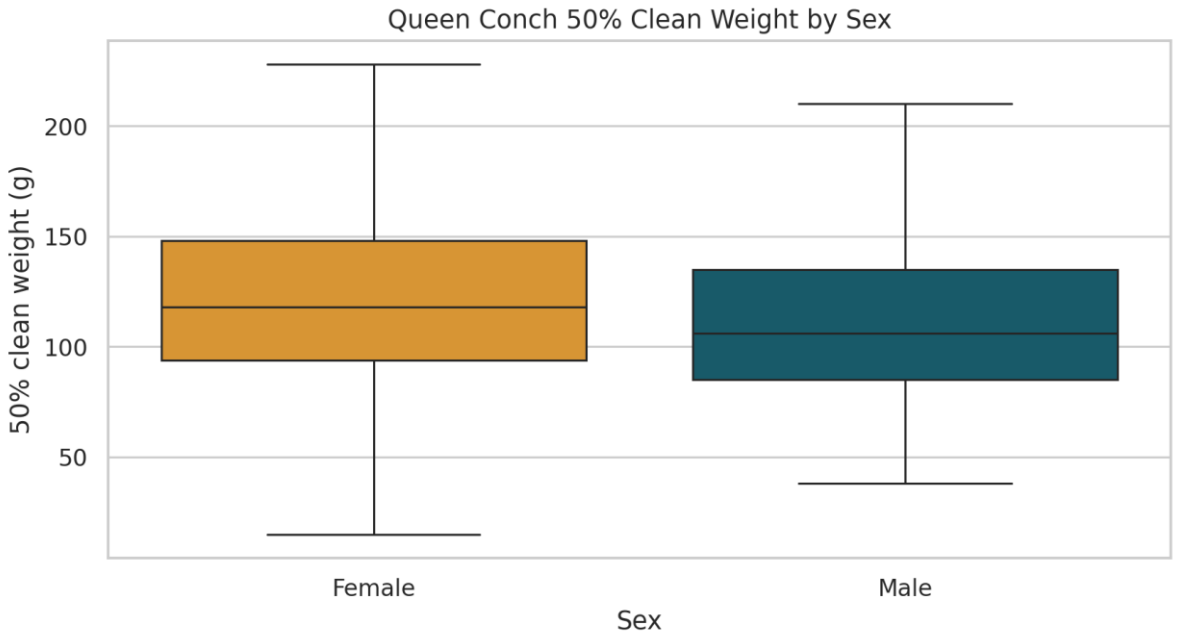


Figure 16. Queen conch 50% clean weight distribution by sex.

Females had a higher mean 50% clean weight than males, averaging 125.25 g compared with 115.20 g. The sex-based difference was statistically significant (Welch $t = 7.81$, $p < 0.001$), confirming that sex composition can materially influence clean-weight yield. This matters for the sector because clean weight is closely tied to quota use, processing output, inventory planning, and export certification.

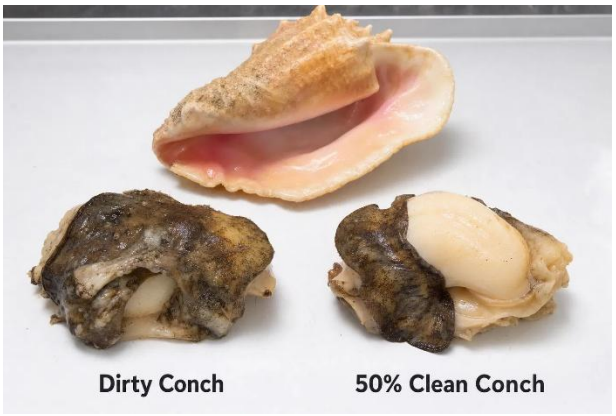


Photo 15: Difference between dirty and clean conch.

Queen Conch Processing, Sampling Coverage and Sector Impact

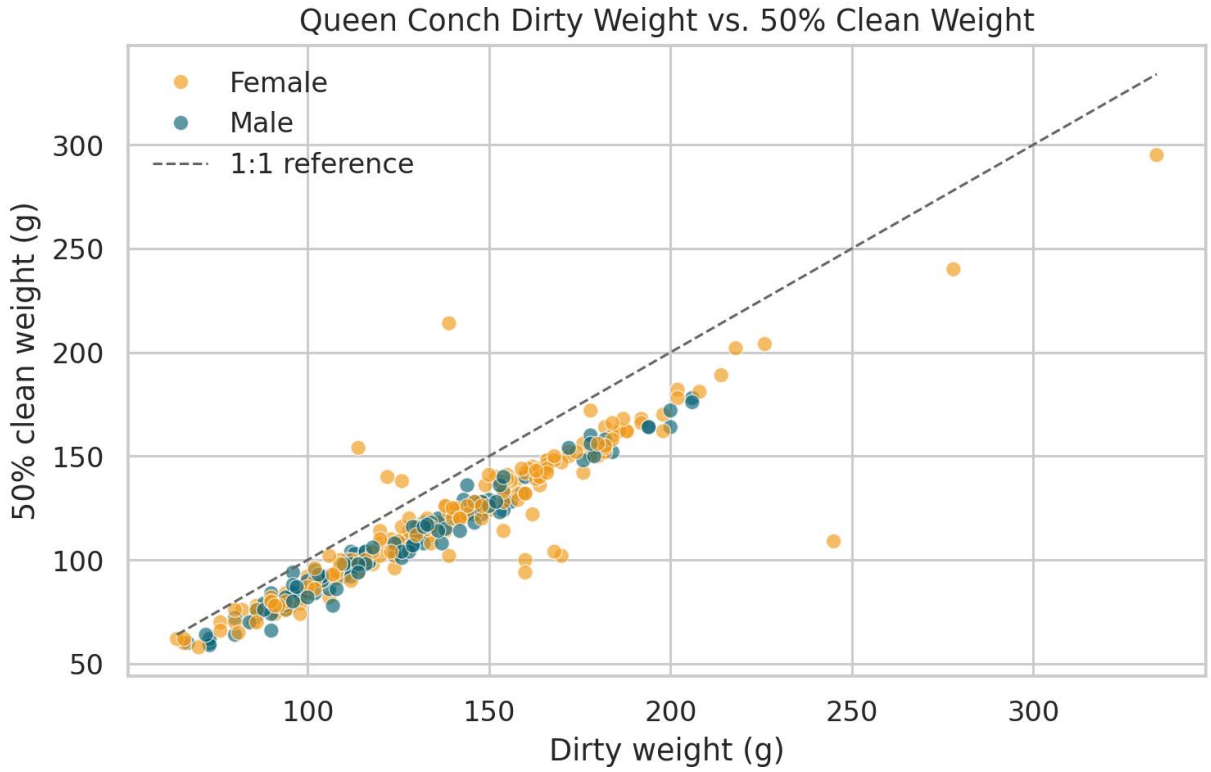


Figure 17. Relationship between the queen conch dirty weight and 50% clean weight.

The positive relationship between dirty and 50% clean weight supports the continued use of clean-weight monitoring as a practical measure for product control. However, the spread of points also shows that individual processing outcomes vary, which may reflect animal size, sex, trimming practice, handling method, or vessel-level processing differences. Maintaining consistent biological and processing measurements, therefore, improves both stock assessment and commercial accountability.

Month	Sample count
May 2025	445
June 2025	1,828
July 2025	1,408
August 2025	2,118
September 2025	280

Sector interpretation

Conch remains a quota-managed export fishery in which biological measurements must support compliance, traceability, and sustainable harvest decisions. The Jamaica Trade Portal identifies NFA export quota approval as a requirement for queen conch exportation, supported by quota allocation, licensing and export documents. The biological dataset, therefore, has direct operational value: it links sampled animals to quota-use confidence, product standards, and export-market readiness.

SOCIOECONOMIC OVERVIEW

The Q3 licensing data records 2,055 licensed fishers across new and renewed licences. The quarter was directly shaped by Hurricane Melissa, which occurred in October 2025, and the post-hurricane operating environment became an important factor in interpreting fisher participation, market access, GDP movement, and fishery price pressure.

Hurricane Melissa affected the quarter through both production and market channels. On the production side, severe weather, reduced fishing days, disrupted landing-site activity, damaged or unavailable gear, and interruptions to coastal transport constrained harvest volumes and fisher income. On the market side, irregular supply, higher operating and transport costs, and post-storm demand for available fish would be expected to place upward pressure on parish-level fish prices, particularly in the weeks after the October shock.

The analysis, therefore, focuses on three connected issues: the composition of the licensed fisher population, the age profile of new and renewed licence holders, and the economic setting reflected in fishing GDP and local fish prices. Together, these indicators provide a concise view of the social and market conditions affecting Jamaica's fisheries sector during Q3 FY2025/26.

Photo 16A & B: Artisanal fishers operating from their fishing

Sex Distribution of Licensed Fishers

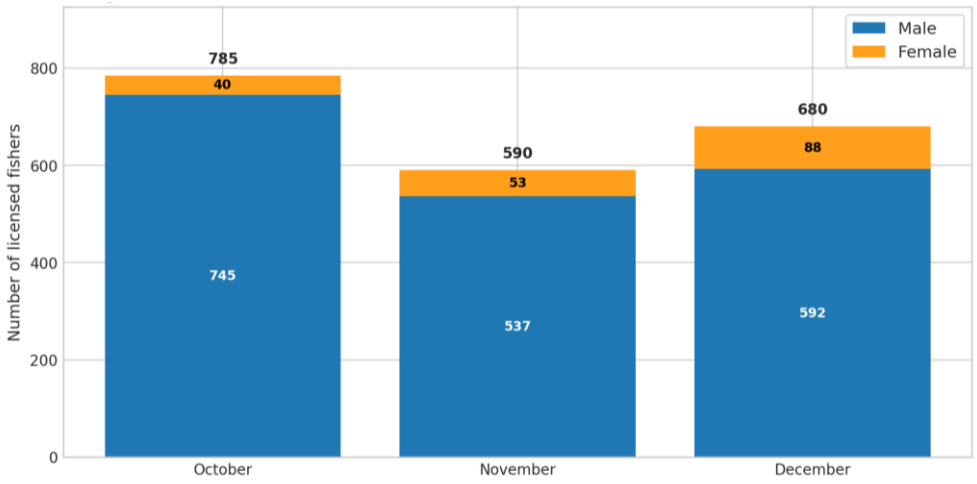


Figure 18: Sex distribution of licensed fishers, October – December 2025.

Table 12. Sex Distribution of Licensed Fishers, October–December 2025

Sex	October	November	December	Total	Share of Quarter (%)
Male	745	537	592	1874	91.2
Female	40	53	88	181	8.8

The sex distribution remained strongly male-dominated during Q3. Male fishers accounted for 1,874 licence records, equivalent to 91.2% of the quarterly total, while female fishers accounted for 181 records or 8.8%. Monthly totals moved from 785 in October to 590 in November and 680 in December. This pattern suggests a contraction in licensing activity during November, followed by a partial recovery in December.

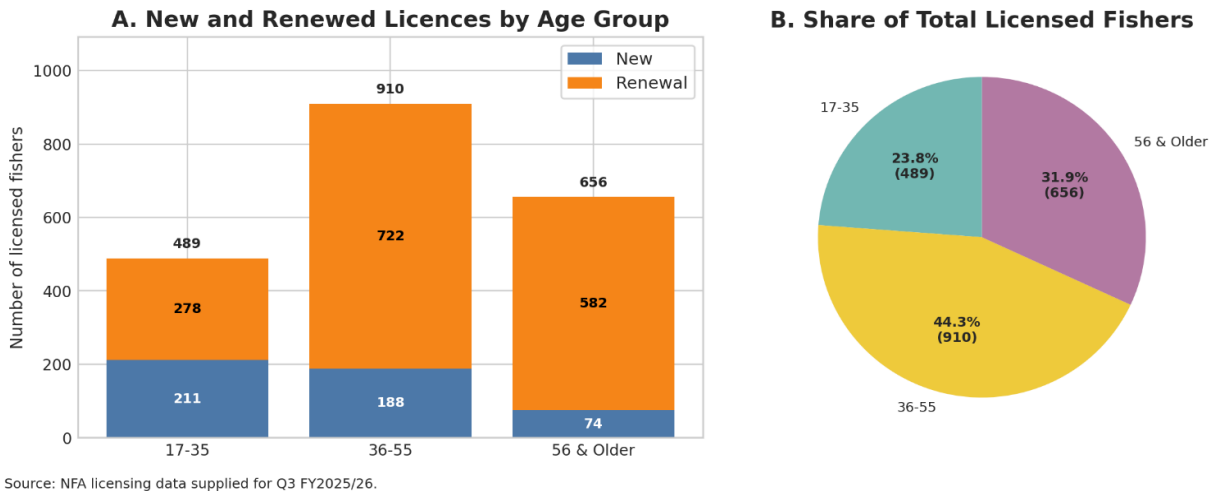
The female share increased across the quarter, rising from 40 licence records in October to 88 in December. Although the sector remained dominated by men, the December increase suggests that female participation was more visible toward the end of the quarter. From a socio-economic perspective, this supports continued monitoring of gender-specific barriers to licensing, market participation, and access to fisheries support services.

Photo 17: Data collection activity with a Fisher at a landing site.

Age Distribution of Licensed Fishers

Table 13. Age Distribution of Licensed Fishers, New and Renewed Licences, October–December 2025

Age Group	New	Renewal	Total	Share of Total (%)	Renewal Rate (%)
17-35	211	278	489	23.8	56.9
36-55	188	722	910	44.3	79.3
56 & Older	74	582	656	31.9	88.7



Source: NFA licensing data supplied for Q3 FY2025/26.

Figure 19: Age distribution of licensed fishers, October – December 2025.

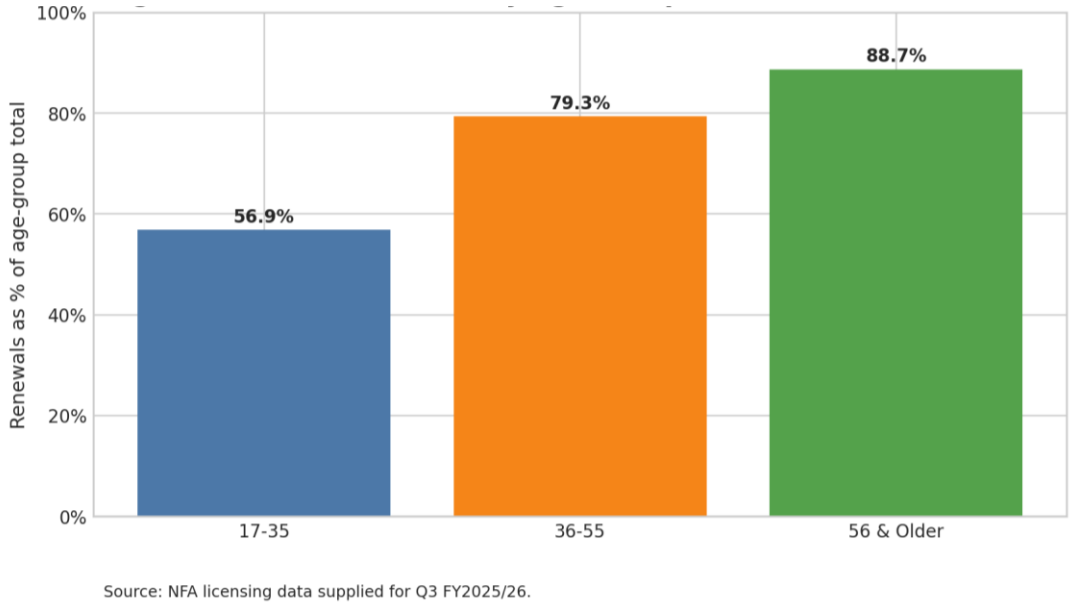


Figure 20: Renewal rate by age group, October – December 2025.

Across age groups, the 36-55 category represented the largest cohort with 910 licensed fishers, equal to 44.3% of the Q3 total. The 56 & Older group followed with 656 fishers, while the 17–35 group accounted for 489 fishers. This distribution shows that the sector continues to rely heavily on mid-careers and older fishers, although younger fishers remain an important component of the licensing base.

Renewals made up 1,582 records or 77.0% of all Q3 licences, while new entrants accounted for 473 records or 23.0%. The highest renewal rate occurred among the 56 & Older cohort at 88.7%, indicating stronger licence continuity among older fishers. By contrast, the 17–35 group recorded the lowest renewal rate but the largest number of new entrants, which points to a continued need for targeted youth retention and training interventions.

Gross Domestic Product (GDP) Status

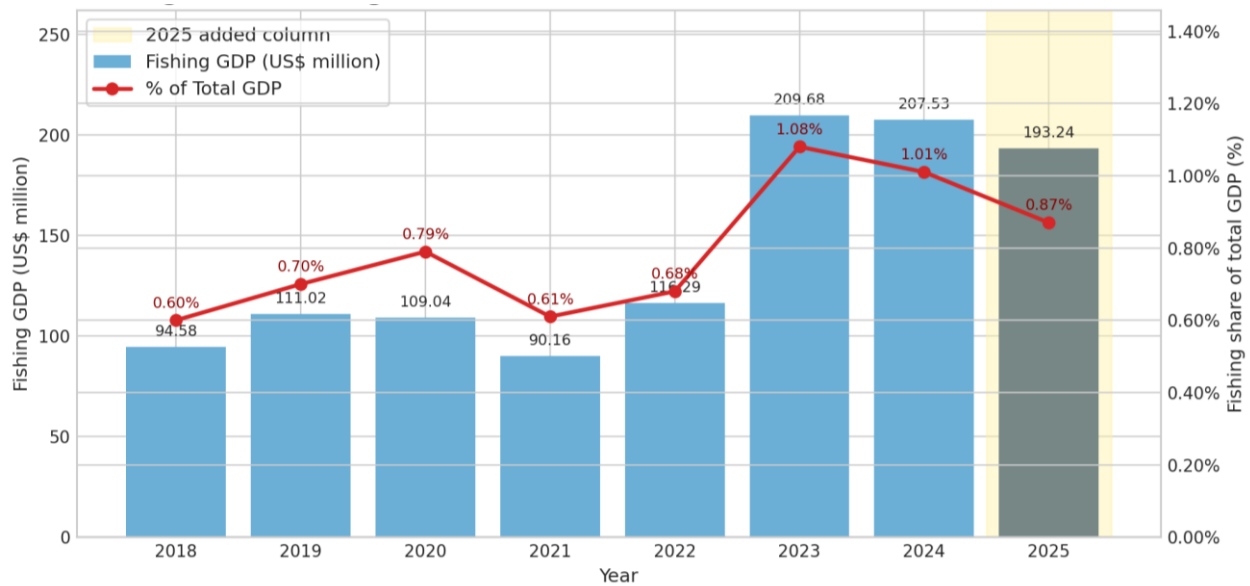


Figure 21. Fishing GDP Contribution Based on Basic Prices, 2018–2025, with 2025 column added for the Q3 FY2025/26 update.

Source: GDP reference table supplied for Q3 FY2025/26.

Table 14. GDP Contribution Based on Basic Prices, 2018–2025

Indicator	2018	2019	2020	2021	2022	2023	2024	2025
Total GDP	15,650.65	15,810.81	13,880.88	14,670.67	17,100.04	19,420.00	20,586.00	22,310.00
Agriculture, Forestry & Fishing	1,014.84	1,018.94	1,004.30	1,087.60	1,185.94	1,117.90	1,752.70	1,490.20
Fishing	94.58	111.02	109.04	90.16	116.29	209.68	207.53	193.24
% Contribution of fishing to Agriculture	9.32%	10.90%	10.86%	8.29%	9.81%	18.76%	11.84%	13.00%
% Contribution of fishing to total GDP	0.60%	0.70%	0.79%	0.61%	0.68%	1.08%	1.01%	0.87%

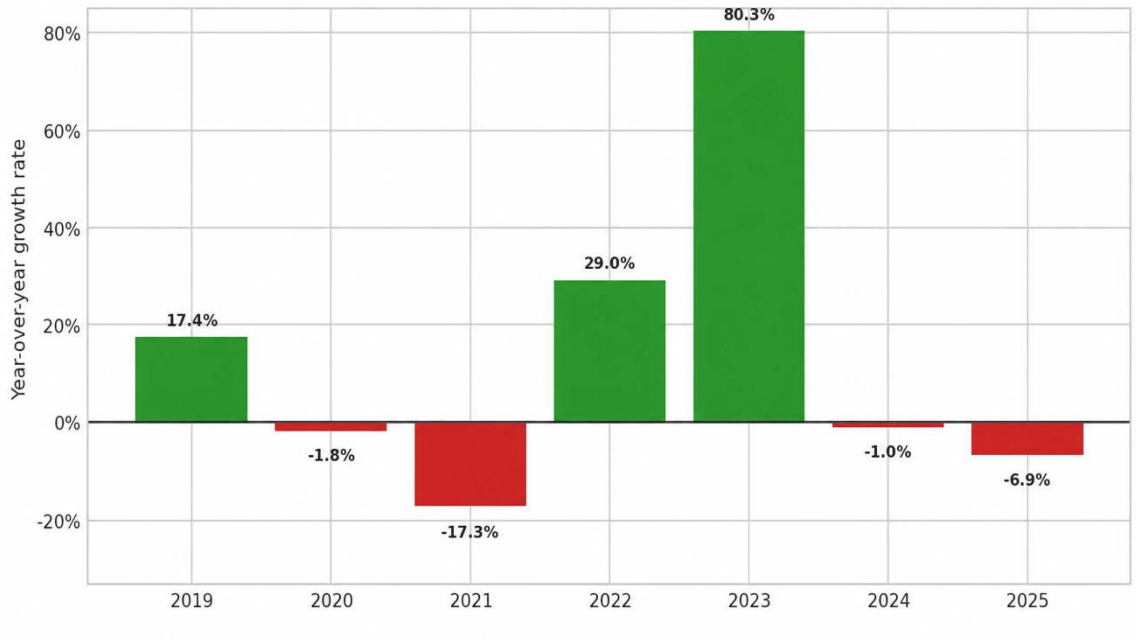


Figure 22: Fishing GDP Year-over-Year Growth Rate, 2019-2025.

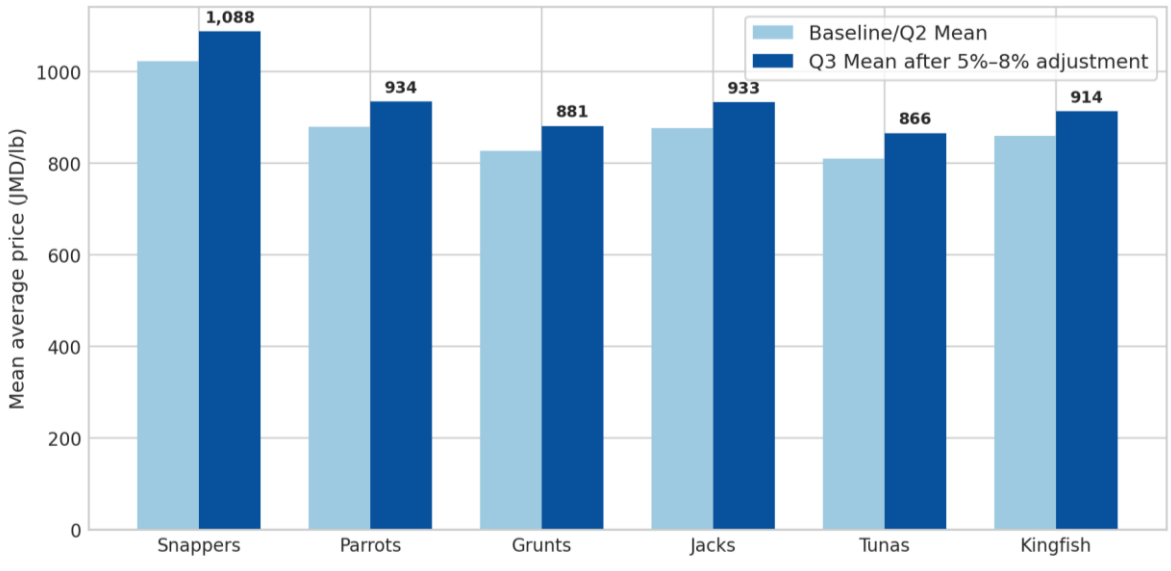
The GDP table shows fishing GDP at US$193.24 million or JMD$30.28 billion. This is below the US$207.53 million or JMD$32.52 billion recorded in 2024, representing an estimated year-over-year change of -6.9%. The decline is consistent with a weaker fisheries operating environment in 2025, and the October 2025 Hurricane Melissa shock provides an important explanatory context for the Q3 interpretation.

The likely GDP impact of Hurricane Melissa should be interpreted as a reduction in short-term fisheries output rather than a structural collapse of the sector. Storm-related sea conditions and safety restrictions would have limited fishing effort, while damage to vessels, engines, traps, nets, cold storage, landing sites, and road access could have delayed the return to normal production. These disruptions would tend to lower landed volumes and value added in the affected period, contributing to the observed softening in fishing GDP relative to 2024. However, fishing GDP remained above the 2018–2022 levels, indicating that the sector retained a higher output base despite the hurricane-related setback.

Fishing represented 0.87% of total GDP in 2025, compared with 1.01% in 2024, indicating a lower overall contribution to the national economy. However, the annual decline should not be interpreted as a uniform weakening across the year. The sector recorded its strongest performance in Q3, showing that fishing activity was still capable of generating solid output before the later-year disruption. This suggests that the main weakness was concentrated in the summer months, rather than being driven solely by the Hurricane Melissa period. In this context, Hurricane Melissa likely added further pressure toward the end of the year, but the broader annual reduction appears to have been shaped more by earlier seasonal underperformance. Despite the decline in its share of total GDP, fishing remained an important component of the Agriculture, Forestry and Fishing category, contributing 13% in 2025. This continued share indicates that fishing retained meaningful sectoral importance, even though weaker summer performance reduced its overall annual contribution.

Fish Price Index

Photo 18: fresh fish display and market activity used to represent price monitoring.



Source: Table 10 baseline prices adjusted upward by 5%–8% for October–December 2025.

Figure 22: Mean average fish prices by species group, Q3 FY 2025/26.

Table 15 highlights the fishery price value for Q3, October–December 2025 and is consistent with the post-Hurricane Melissa market context. The impact of Hurricane Melissa on fishery prices is expected to have operated mainly through supply disruption and cost transmission. Reduced fishing trips after the October storm would have lowered the immediate availability of fresh fish, while damaged gear, higher fuel and ice costs, transport delays, and limited cold-chain access could have increased the cost of bringing fish to market. These conditions support the upward 5%–8% price increase observed and explain why higher prices may have occurred even where fisher income did not necessarily rise by the same proportion.

At the species-group level, Q3 averages show that Snappers averaged JMD 1,088/lb; Parrots averaged JMD 934/lb; Grunts averaged JMD 881/lb; Jacks averaged JMD 933/lb; Tunas averaged JMD 866/lb; Kingfish averaged JMD 914/lb. These higher Q3 prices should be read as a post-hurricane market signal rather than only as ordinary seasonal movement. Hurricane Melissa has likely reduced fishing days and disrupted supply regularity, which would have increased market pressure in selected parishes and contributed to higher consumer-facing fish prices.

Table 15. Fish Prices by Parish, October-December 2025 (JMD per lb)

Parish	Snappers Avg	Snappers Mode	Parrots Avg	Parrots Mode	Grunts Avg	Grunts Mode	Jacks Avg	Jacks Mode	Tunas Avg	Tunas Mode	Kingfish Avg	Kingfish Mode
Clarendon	953	1,060	846	1,060	804	1,060	1,006	1,080				
Hanover	947	1,070	769	1,050	829	1,070	957	1,260	816	856		
Kingston & St. Andrew	929	1,080	840	848	594	756	856	1,060			735	848
Manchester	1,044	1,050	659	642	852	1,050	984	1,070	972	1,050		
Portland	1,038	1,272	941	1,080	805	848	886	864	675	530	802	864
St. Catherine	1,307	1,070			742	749	432	420				
St. Elizabeth	998	1,080	991	1,060	816	1,080	1,050	1,060				
St. Mary	1,376	1,250	1,161	1,284	1,109	1,250	768	642	563	525		
St. Thomas	1,049	1,060	1,036	1,080	1,008	1,050	923	1,080			845	864
St. Ann	1,052	1,070	1,020	1,050	952	1,070	922	1,050				
St. James	1,252	1,296	1,245	1,272	1,201	1,296	1,212	1,272	1,241	1,296		
Trelawny	1,196	1,250	1,208	1,284	1,215	1,260	1,169	1,070	1,080	1,250	1,272	1,284
Westmoreland	1,003	1,060	496	540	529	530	953	1,296	693	636		

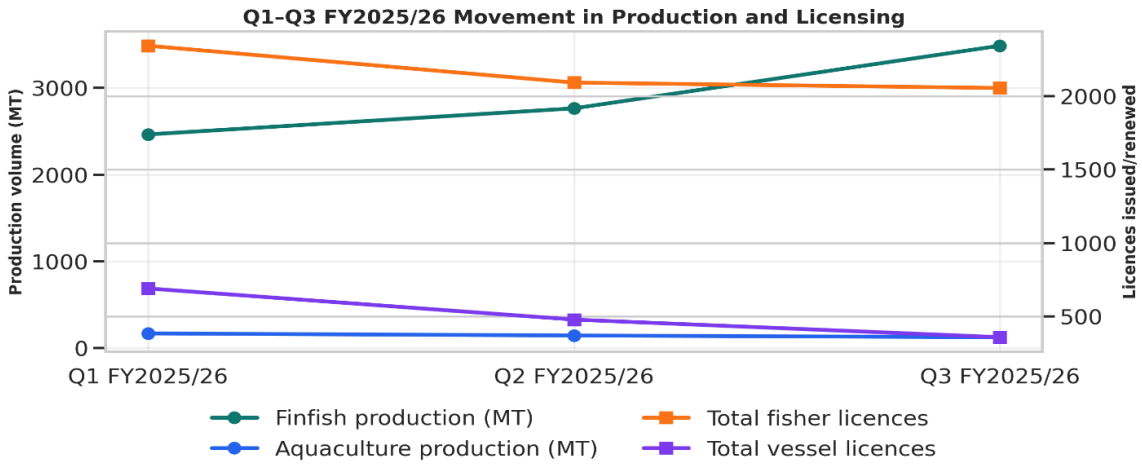


Figure 23: Q1–Q3 FY2025/26 movement in production and licensing.

CONCLUSION

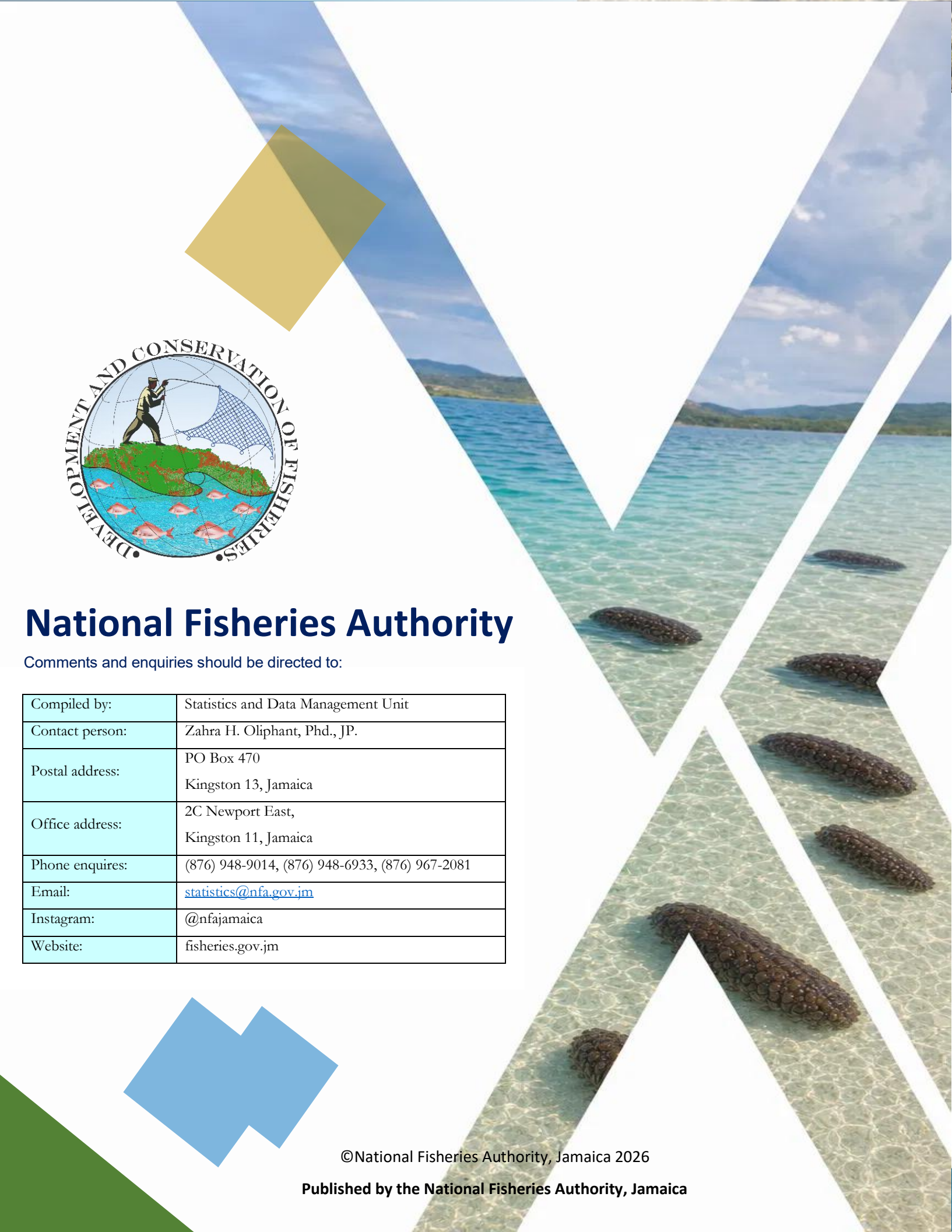
The third quarter of FY2025/26, covering October to December 2025, closed as a period of resilience under disruption for Jamaica's fisheries sector. The most important contextual event was Hurricane Melissa in October 2025, which affected fishing effort, landing-site activity, licensing activities, compliance fieldwork, transport, and market access at the start of the quarter. Even with this disruption, the sector retained a strong operating base. Marine production reached 3,618.71 MT valued at approximately US$52.83 million, with finfish accounting for 3,486.06 MT, or about 96.3% of Q3 marine output. These finfish results represented a 26.1% increase over Q2 production of 2,764.37 MT, although it remained 12.4% below the Q3 FY2024/25 level of 3,977.28 MT, showing that the quarter improved sequentially but had not fully recovered from the weather-related shock and weaker annual comparison.

The monthly production pattern confirms the uneven movement behind the quarter's totals. October finfish production fell to 945.42 MT, approximately 30.4% below October 2024, consistent with the timing of Hurricane Melissa and the resulting constraints on sea days, beach operations, and data collection. November then became the strongest month of the quarter, rising to 1,534.90 MT, an 11.7% year-over-year increase, before December eased to 1,005.74 MT, about 19.1% below December 2024. The value movement followed a similar path: finfish value rose from US$13.69 million in October to US$22.23 million in November, before settling at US$14.57 million in December. This trend indicates that Q3 was not a straight decline; rather, it showed an October disruption, a November recovery, and a December moderation.

Licensing and compliance indicators also point to a sector that remained active but was affected by the hurricane and the post-hurricane operating environment. Total fisher licences for Q3 stood at 2,055, a 4.4% year-over-year decline from 2,150, with October and November falling by 12.7% and 12.6%, respectively, before December rebounded by 18.1%. Renewals accounted for 1,582 licences, or 77.0% of the quarter, confirming that existing fishers continued to anchor the licensed sector. Vessel licensing weakened more sharply, falling from 593 licences in Q3 FY2024/25 to 358 in Q3 FY2025/26, a reduction of about 40%. Compliance activity also softened relative to Q2, with site visits moving from 2,314 in Q2 to 1,451 in Q3, but the Q3 result was still marginally above the prior-year Q3 level of 1,444, showing that monitoring coverage was sustained despite difficult field conditions.

The annual January–December performance gives an important perspective on the quarter's economic meaning. Fishing GDP was estimated at US$193.24 million in 2025, compared with US$207.53 million in 2024, representing a 6.9% year-over-year decline. Fishing's share of total GDP also eased from 1.01% in 2024 to 0.87% in 2025, while its contribution within Agriculture, Forestry and Fishing stood at 13.0%. The annual trend graph shows that fishing GDP remained well above the 2018–2022 range, but below the 2023–2024 peak period. In this context, Hurricane Melissa should be interpreted as a short-term shock that will likely reduce fourth-quarter fishing effort, value added, and market regularity, rather than evidence of a structural collapse. Aquaculture, however, showed a more sustained annual challenge: total annual production declined from 663.32 MT in 2024 to 585.69 MT in 2025, an 11.7% decrease, and stood 38.6% below the stronger 2023 level of 954.23 MT.

Fishery prices reflected the combined effect of storm disruption, supply irregularity, and higher operating costs. These higher prices should therefore be seen as a market signal of constrained supply and increased costs, not necessarily as a proportional improvement in fisher income. Overall, Q3 and the 2025 annual results show a sector with strong underlying participation, recovering marine output, and sustained biological and compliance monitoring, but also one that requires continued support for post-hurricane recovery, aquaculture rebuilding, licence retention, market stability, and climate-resilient fisheries management.



National Fisheries Authority

Comments and enquiries should be directed to:

Compiled by:	Statistics and Data Management Unit
Contact person:	Zahra H. Oliphant, Phd., JP.
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

Published by the National Fisheries Authority, Jamaica