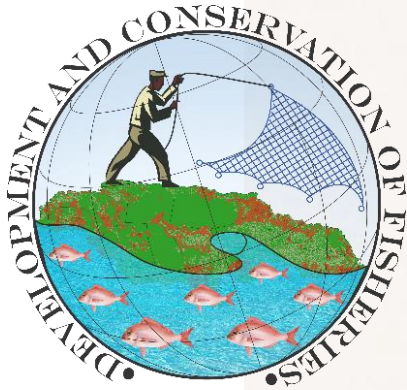




National Fisheries Authority

JAMAICA FISHERIES:
Quarterly Statistics Report

Volume 4: Issue 4

JANUARY – MARCH 2026



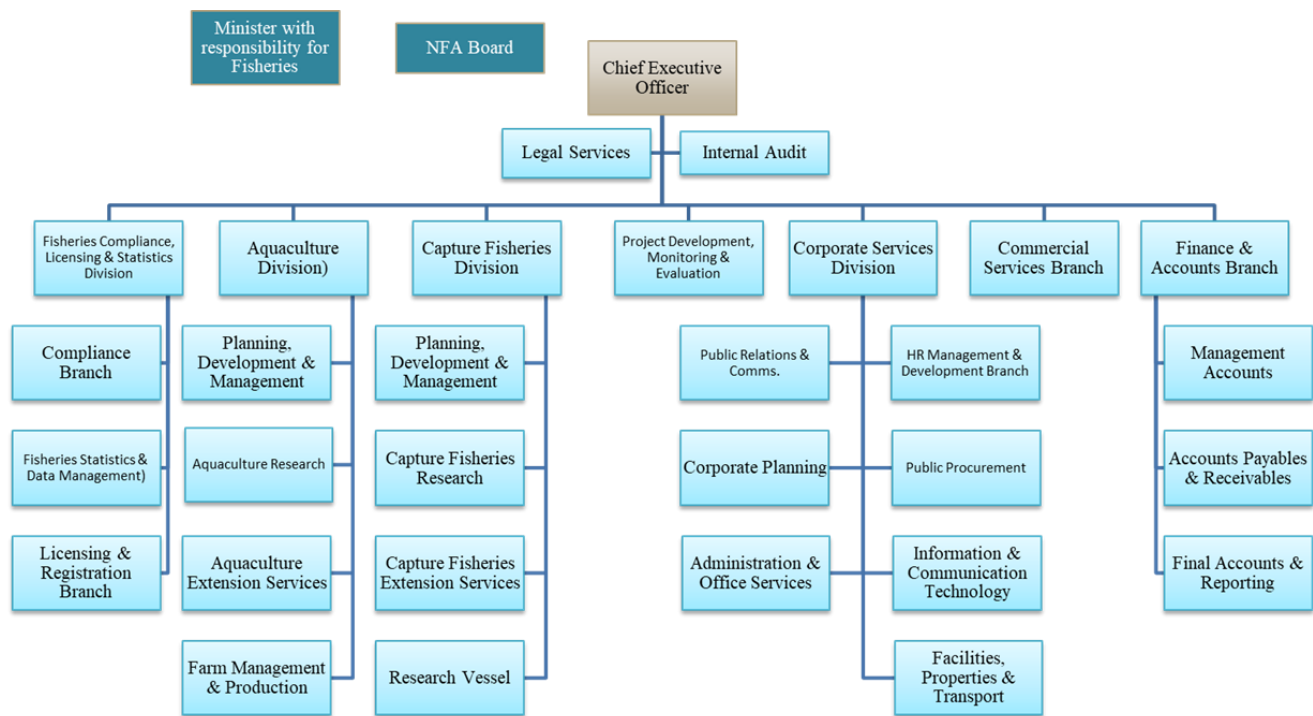


Our Vision

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.



Photos 1 and 2: Images of Jamaica farm-raised freshwater prawns from the aquaculture division, showing both a close-up juvenile prawn and a mature prawn being handled for inspection in a controlled aquaculture setting.





CEO's Message



I am pleased to present the Q4 performance results and overall FY2025/26 outcomes for Jamaica's fisheries sector. The final quarter demonstrated renewed operational momentum, particularly in fisher licensing, where Q4 recorded the strongest quarterly performance of the financial year.

This improvement helped lift annual fisher licence transactions to 9,750, reflecting the continued importance of efficient renewal processing, stakeholder engagement, and timely administrative support.

The FY2025/26 results show that the sector remained broadly resilient despite mixed performance across key areas. Marine production closed the year at approximately 12,623.56 metric tonnes, valued at about US\$184.14 million, with artisanal finfish continuing to account for the majority of output and value. This performance confirms that capture fisheries remain central to national fisheries production, livelihoods, and food supply.

At the same time, the year-end results point to areas that require sustained attention. Vessel licensing improved in Q4 compared with Q3 but remained below the comparable quarter of the previous financial year, while aquaculture, particularly tilapia production, ended below target after declining across the year. These trends reinforce the need to strengthen renewal follow-up, improve service continuity, and support targeted recovery actions in aquaculture.

As we move into FY2026/27, the National Fisheries Authority will focus on converting the Q4 recovery into sustained annual performance. Our priorities will include stronger licensing support, improved compliance coordination, better data collection, aquaculture recovery, and continued evidence-based management. I commend the staff, fishers, vessel owners, farmers, and sector partners whose contributions supported the sector throughout FY2025/26.

Dr Gavin Bellamy JP
Chief Executive Officer

Principal Director's Message



Q4 provided an important end-of-year signal for the fisheries sector, showing both recovery and vulnerabilities. Fisher licensing strengthened significantly during the quarter, making Q4 the highest-performing period of FY2025/26 for fisher licence transactions.

This outcome suggests that renewal activity, field engagement, and administrative processing gained momentum toward the close of the financial year.

Overall, for FY2025/26, the sector delivered a mixed but informative performance. Marine production remained relatively strong, reaching approximately 12,623.56 metric tonnes, with an estimated value of US\$184.14 million. Production increased through the middle of the year before moderating in Q4, but the second half still performed better than the first half, indicating continued resilience in capture fisheries despite normal seasonal and operational pressures.

The data also highlight areas requiring focused management response. Vessel licensing was renewal-driven and improved in Q4 relative to Q3, but the annual and year-on-year patterns show that renewal retention remains a critical risk. Aquaculture performance was weaker, with tilapia output falling below target and declining from Q1 to Q4, underscoring the need for recovery planning, farm-level support, hatchery strengthening, and closer production monitoring.

Looking ahead, expectations for FY2026/27 are cautiously positive but conditional on timely action. Fisher licensing should remain stable if Q4 renewal momentum is maintained, while vessel licensing will require stronger owner follow-up and reminder systems. Marine production is expected to remain broadly stable, subject to weather, fishing effort, and market conditions, while aquaculture recovery will depend on targeted interventions. The priority for the next reporting year is to reduce volatility, restore weaker subsectors, and use timely statistics to guide practical fisheries management decisions.

Dr Zahra Oliphant (PhD, JP)
Principal Director





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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.



Photo 4: Capture Fisheries Principal Director Stephen Smikle presents a certificate in longline and fish aggregate to a local Fisher.

Q4 2025/26 AT A GLANCE



***3,375.55** TONNES – ** MARINE
115 TONNES – AQUACULTURE



3,193 LOBSTER BIOLOGICAL
SAMPLES
1,875 CONCH BIOLOGICAL
SAMPLES



745 NEW FISHER LICENCES ISSUED
2,515 RENEWED FISHER LICENCES
37% FISHER LICENCE RENEWAL
RATE



PRODUCTION VALUE
USD 49.6M – ** MARINE
USD 1.04M – AQUACULTURE



2 JOINT OPERATIONS (JDF&JCF)
1,739 SITE VISITS EXECUTED
44 INSPECTIONS EXECUTED
24.60 lbs PRODUCTS SEIZED



2,881 MALE FISHER LICENCES
ISSUED
380 FEMALE FISHER LICENCES
ISSUED



105 LANDING SITES VISITED
64 AQUACULTURE FARM VISITS
3 IN-FIELD LICENSING SESSION



6,000+ IRIE FINS USERS
4,800+ INSTAGRAM FOLLOWERS
3,600+ FACEBOOK FOLLOWERS
2,600+ TIKTOK FOLLOWERS
136 X (Formerly Twitter)



76 NEW VESSEL LICENCES ISSUED
352 RENEWED VESSEL LICENCES

* Preliminary numbers and are subject to change

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



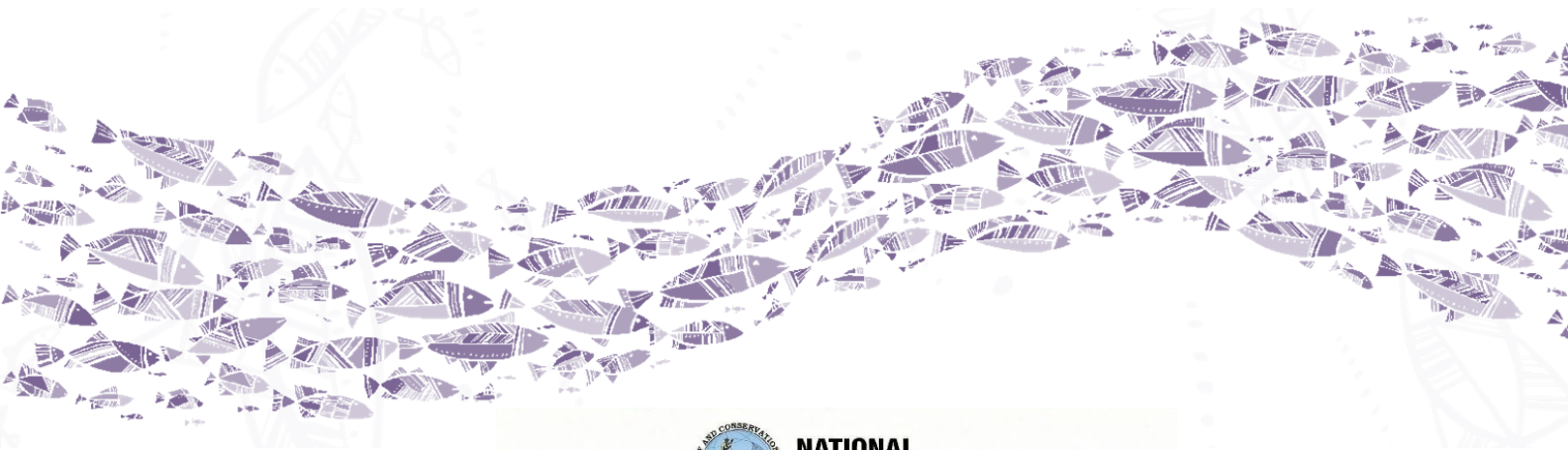


NFA
FARM-RAISED
PRAWN
AQUACULTURE
FIELD
ACTIVITIES





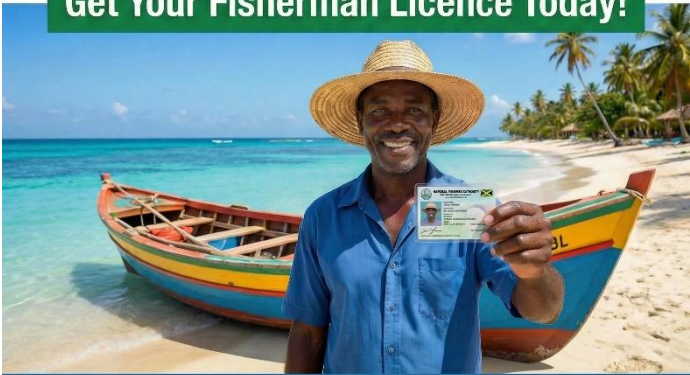
REGULATORY PERFORMANCE OVERVIEW





**DO NOT GET CAUGHT
WITH AN EXPIRED LICENCE**

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Fishing Vessels

The vessel operations side of the Licensing and Registration Unit recorded a total of 428 vessel licence transactions in Q4, January–March 2026, comprising 76 new vessel licences and 352 renewed vessel licences. This means that renewals accounted for 82.2% of all Q4 vessel licence activity, while new vessel licences represented 17.8%. The Q4 pattern, therefore, shows that the operational workload remained heavily concentrated in the renewal of existing vessel licences rather than the entry of new vessels into the licensing system.

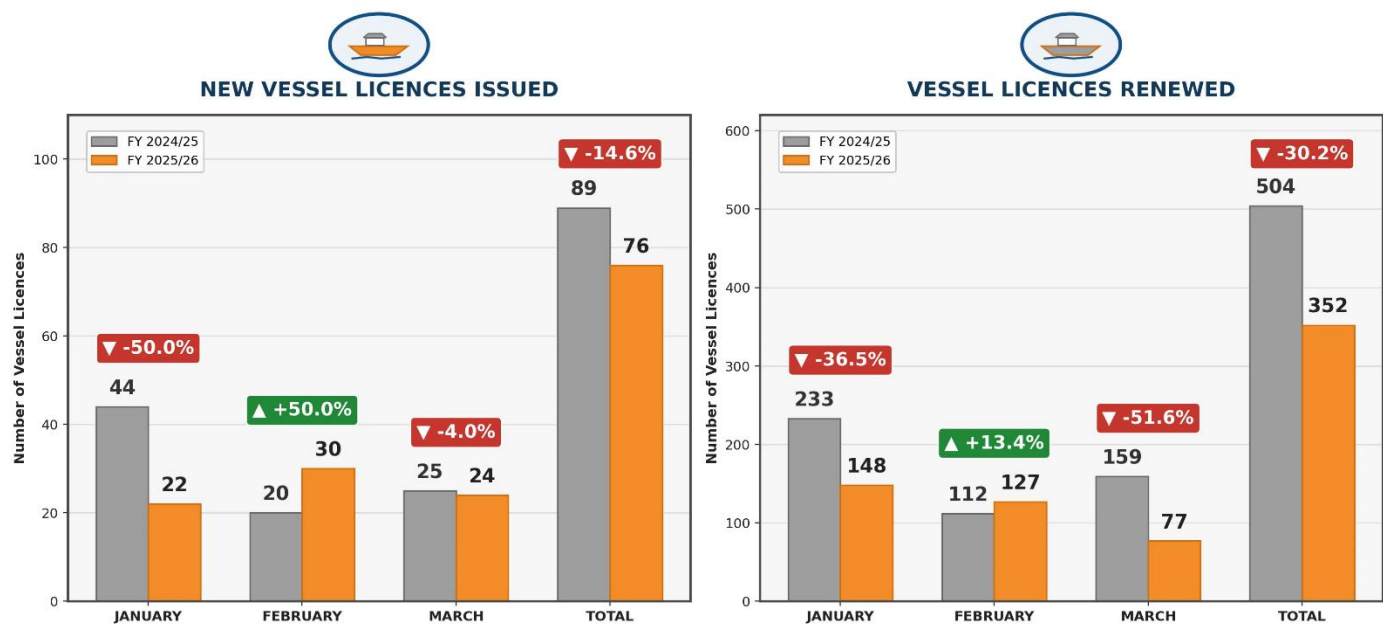


Figure 1(a): New vessel licences issued, January to March (Q4).

Figure 1(b): Vessel licences renewed, January to March (Q4).

Compared with Q4 January–March 2025, total vessel licensing activity declined from 593 to 428 licences, representing an overall reduction of 165 licences, or -27.8%. The decline was driven mainly by the renewal category, which fell from 504 to 352 renewals, a decrease of 152 renewals, or -30.2%. New vessel licences declined more moderately, moving from 89 to 76 licences, a reduction of 13 licences, or -14.6%. This indicates that the contraction in Q4 performance was primarily caused by lower renewal activity, rather than a major collapse in new vessel registration.

Table 1. Comparison of Q4 Vessel Licence Transactions by Performance Indicator, FY 2024/25 and FY 2025/26

Q4 Performance Indicator	FY 2024/25	FY 2025/26	Absolute Change	Percentage Change
New vessel licences issued	89	76	-13	-14.6%
Vessel licences renewed	504	352	-152	-30.2%
Total vessel licence transactions	593	428	-165	-27.8%

The month-by-month Q4 results show uneven performance. January 2026 recorded 170 total vessel licence transactions, down from 277 in January 2025, representing a 38.6% year-on-year decline. February 2026 was the only month in Q4 to outperform the previous year, increasing from 132 to 157 total transactions, or +18.9%. This improvement was supported by both a rise in new licences from 20 to 30 and renewals from 112 to 127. However, the positive February movement was not sustained into March. March 2026 fell sharply from 184 to 101 total transactions, a -45.1% decline, largely because renewals dropped from 159 to 77, or -51.6%.





Quarterly Vessel Licence Performance, FY 2025/26

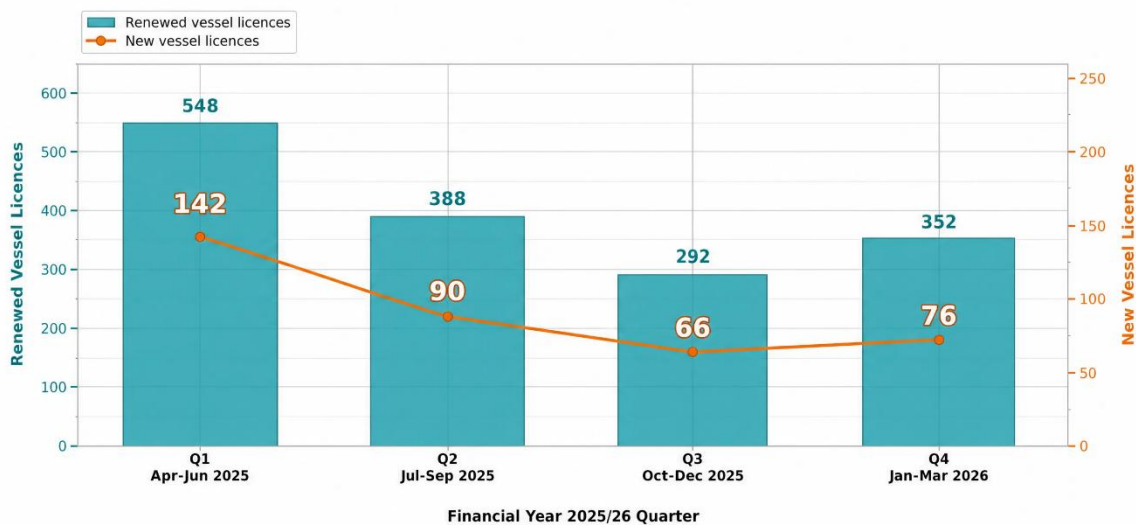


Figure 2: Quarterly Vessel Licence Performance, FY 2025/26.

Table 2. Monthly Q4 Vessel Licence Transactions and Year-on-Year Change, FY 2025/26

Q4 Month	New FY 2025/26	Renewed FY 2025/26	Total FY 2025/26	Total Year-on-Year Change
January	22	148	170	-38.6%
February	30	127	157	+18.9%
March	24	77	101	-45.1%
Q4 Total	76	352	428	-27.8%

Within Q4 FY 2025/26, the monthly composition of work also shifted slightly. New vessel licences represented 12.9% of January activity, 19.1% of February activity, and 23.8% of March activity. This does not necessarily indicate strong growth in new licences; rather, it reflects the fact that renewals declined more sharply than new licences in March. The operational implication is that renewal follow-through weakened toward the end of the quarter, reducing the overall transaction base despite relatively stable new-licence volumes.

For the full FY 2025/26, the Unit processed 1,954 vessel licence transactions, made up of 374 new vessel licences and 1,580 renewed vessel licences. Renewals accounted for 80.9% of total annual vessel activity, while new licences accounted for 19.1%. This annual distribution confirms that vessel licensing operations are structurally renewal-driven, with the renewal process forming the largest and most consistent part of the Unit’s operational workload.

NATIONAL FISHERIES AUTHORITY
NEWPORT EAST, KINGSTON 11
JAMAICA

COMMERCIAL FISHING VESSEL
LICENCE
THE FISHERIES ACT, 2018

Registration #: [Redacted]
Previous Reg #: [Redacted]
Licence #: [Redacted]

COMMERCIAL FISHING VESSEL LICENCE

Broadside (Side) View:

Bow (Front) or Stern (Back) View:

PARTICULARS OF VESSEL

Name of Vessel: [Redacted]
Vessel Registration Mark: [Redacted]
Hull Colour: [Redacted]
Hull Number: [Redacted]
Vessel Dimension (L*W*D) in m: [Redacted]
Vessel Gross Tonnage: [Redacted]

PARTICULARS OF OWNER(S)

Name of Owner #1: [Redacted]
Name of Owner #2: [Redacted]
Company Name: [Redacted]
Owner Registration #1: [Redacted]
Owner Registration #2: [Redacted]
Address #1: [Redacted]

CONDITIONS OF LICENCE

This Fishing Vessel is licensed by the National Fisheries Authority in accordance with The Fisheries Act, 2018 to fish in the following area(s) of:

Jamaica's Maritime Space: [Redacted]
with the following fishing gear: [Redacted]
for the following fish species: [Redacted]
and is restricted to the following catch quota: [Redacted]

Issue Date: [Redacted] Expiry Date: [Redacted]

National Fisheries Authority,
Jamaica
[Stamp/Seal]

Any breach of the conditions of this licence and/or failure to comply with any of the provisions of The Fisheries Act, 2018 or attendant regulations, may result in suspension, cancellation, or revocation of this licence in accordance with Sections 20 and 28 of the Act.

CONDITIONS CONTINUE ON REVERSE SIDE

Photo 5: Sample of a Vessel Licence.





Table 3. Quarterly Vessel Licence Transactions and Licence Shares, FY 2025/26

Financial Year Quarter	New Vessel Licences	Renewed Vessel Licences	Total Vessel Licences	New Share	Renewal Share
Q1 Apr–Jun 2025	142	548	690	20.6%	79.4%
Q2 Jul–Sep 2025	90	388	478	18.8%	81.2%
Q3 Oct–Dec 2025	66	292	358	18.4%	81.6%
Q4 Jan–Mar 2026	76	352	428	17.8%	82.2%
FY 2025/26 Total	374	1,580	1,954	19.1%	80.9%

The annual quarterly trend shows that vessel licensing activity was strongest in Q1, when 690 total licences were processed. Activity then declined to 478 in Q2, a quarter-on-quarter reduction of 30.7%, before falling further to 358 in Q3, a reduction of 25.1%. Q4 showed a partial recovery, with the total number of licences increasing to 428, up 19.6% from Q3. Despite this improvement, Q4 remained well below the Q1 peak, with total vessel licence activity 38.0% lower than Q1.

The same pattern is visible in both licence categories. New vessel licences decreased from 142 in Q1 to 90 in Q2 and 66 in Q3, before improving modestly to 76 in Q4. Although Q4 new licences increased by 15.2% compared with Q3, they remained 46.5% below Q1, indicating that new vessel entry slowed substantially after the first quarter. Renewals followed a similar trajectory, moving from 548 in Q1 to 388 in Q2 and 292 in Q3, before recovering to 352 in Q4. The Q4 renewal recovery of 20.5% over Q3 was encouraging, but renewal activity remained 35.8% below Q1.

Table 4. Quarter-on-Quarter Movement in Vessel Licence Transactions, FY 2025/26

Quarter-on-Quarter Movement	New Licences	Renewed Licences	Total Licences
Q2 compared with Q1	-36.6%	-29.2%	-30.7%
Q3 compared with Q2	-26.7%	-24.7%	-25.1%
Q4 compared with Q3	+15.2%	+20.5%	+19.6%
Q4 compared with Q1	-46.5%	-35.8%	-38.0%

Overall, the vessel operations performance for FY 2025/26 reflects a year of front-loaded licensing activity, followed by a mid-year contraction and a partial recovery in the final quarter. Q1 was the strongest operating period, while Q3 represented the lowest point for both new and renewed vessel licences. Q4 improved relative to Q3, suggesting some recovery in operational throughput, but the year-on-year Q4 comparison shows that the final quarter still underperformed the previous financial year’s Q4 by a substantial margin.

From an operational management perspective, the key statistical finding is that renewal performance determines overall vessel licensing performance. Since renewals represented more than four-fifths of total annual activity, any decline in renewal processing has a major effect on the Unit’s total output. The sharp Q4 year-on-year decline in renewals, particularly in March, should therefore be treated as a priority area for follow-up. Possible areas for management review include renewal reminders, compliance follow-up, processing bottlenecks, vessel owner response rates, and the timing of field or administrative support during the final quarter.

In conclusion, the Licensing and Registration Unit processed a substantial annual vessel licensing workload of 1,954 transactions in FY 2025/26, but performance weakened after Q1 and did not fully recover by year-end. Q4 showed improvement over Q3, especially in renewals, but it remained below both Q1 levels and the previous year’s Q4 output. The statistical evidence suggests that improving renewal retention, reducing late-quarter drop-offs, and strengthening follow-up with existing vessel owners would have the greatest impact on future vessel operations performance.





Table 5. Monthly Vessel Licence Transactions by Category, April–March FY 2025/26.

CATEGORY	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	TOTAL
ARTISANAL	207	253	192	129	160	136	168	90	62	220	102	168	1887
INDUSTRIAL	1	6	5	10	8	6	4	1	4	4	2	4	55
RECREATIONAL	10	6	3	8	4	5	11	6	5	6	6	7	77
**CAY	2	0	0	0	0	0	0	0	0	44	22	6	74
SPORTS CHARTER	0	2	3	1	4	7	5	1	1	2	0	0	26
TEMP VESSEL CERTIFICATE	0	0	0	0	0	0	0	0	0	0	0	0	0
CONCH	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	220	267	203	148	176	154	188	98	72	276	132	185	2119

** Cay applications are accepted only in Jan; numbers reflecting in the other months are on account of outstanding matters relating to the applications.

Fisher Licences

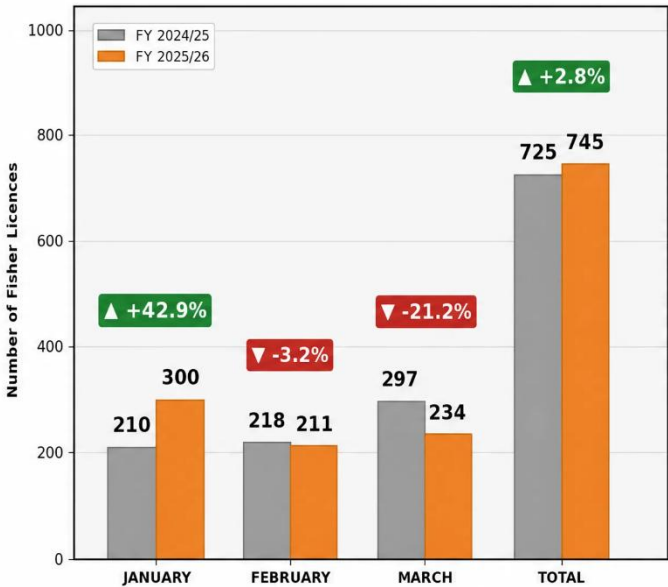


Figure 3(a): New fisher licences issued, January to March (Q4).

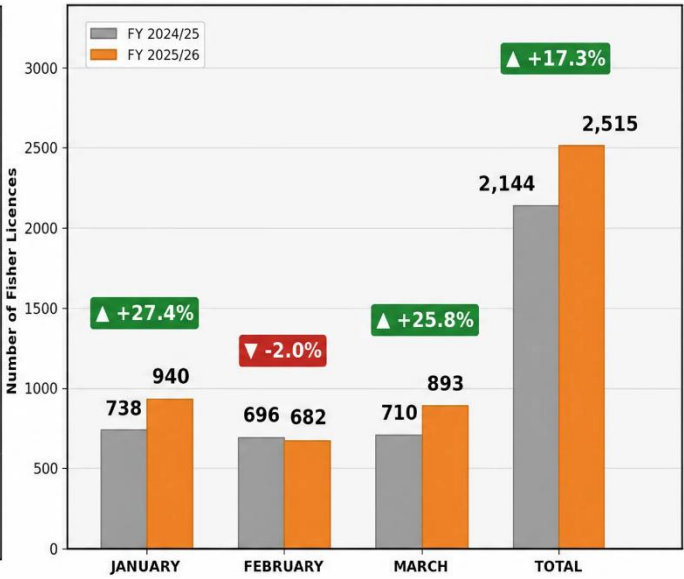


Figure 3(b): Fisher licences renewed, January to March (Q4).

The fisher licence data for Financial Year 2025/26 shows a strong renewal-led performance, with the most pronounced activity occurring in Q4, January to March 2026. Across the full financial year, a total of 9,750 fisher licences were issued or renewed, consisting of 2,503 new licences and 7,247 renewals. This means that renewals accounted for approximately 74.3% of all fisher licence transactions during the year, while new licences represented 25.7%. The overall pattern indicates that the licensing system was driven primarily by existing licence holders renewing, rather than by the entry of new fishers. The moratorium on licence fees is an attributing factor.

Table 6: Fisher Licences Issued and Renewed by Quarter, FY2025/26					
Period	New Licences	Renewals	Total Licences	Renewal Share	New Licence Share
Q1: April - June 2025	676	1,667	2,343	71.1%	28.9%
Q2: July - September 2025	609	1,483	2,092	70.9%	29.1%
Q3: October - December 2025	473	1,582	2,055	77.0%	23.0%
Q4: January - March 2026	745	2,515	3,260	77.1%	22.9%
FY2025/26 Total	2,503	7,247	9,750	74.3%	25.7%





Q4 recorded the highest quarterly output of the financial year, with 3,260 fisher licences processed between January and March 2026. This represented a substantial increase when compared with Q4 of FY2024/25, when 2,869 licences were processed. The year-on-year increase was therefore 391 licences, equivalent to +13.6%. The increase was mainly attributable to renewals, which rose from 2,144 in Q4 FY2024/25 to 2,515 in Q4 FY2025/26, reflecting a +17.3% improvement. New licences increased more modestly from 725 to 745, representing a +2.8% year-on-year gain.

Table 7: Q4 Fisher Licence Year-on-Year Comparison, FY2024/25 and FY2025/26

Q4 Category	FY2024/25	FY2025/26	Change	Percentage Change
New fisher licences	725	745	+20	+2.8%
Renewed fisher licences	2,144	2,515	+371	+17.3%
Total fisher licences	2,869	3,260	+391	+13.6%

The monthly Q4 trend shows that January 2026 was the strongest month, with 1,240 total licences issued or renewed. This was 30.8% higher than in January 2025 and was supported by increases in both new licences and renewals. New fisher licences rose from 210 to 300, a +42.9% increase, while renewals rose from 738 to 940, a +27.4% increase. This suggests a strong start to the quarter and may indicate a concentration of licence activity at the beginning of the calendar year.

February 2026 was the weakest month in the quarter, with 893 total licences, compared with 914 in February 2025. This represented a slight year-on-year decline of -2.3%. Both new licences and renewals fell marginally, with new licences declining by -3.2% and renewals by -2.0%. However, the decline was limited and did not materially affect the overall positive Q4 result.

March 2026 showed a mixed pattern. New licences fell from 297 in March 2025 to 234 in March 2026, a decrease of 21.2%. However, this reduction was more than offset by a strong increase in renewals, which rose from 710 to 893, or +25.8%. As a result, total March activity increased from 1,007 to 1,127, equivalent to +11.9%. This confirms that the Q4 increase was not dependent solely on new entrants but was largely sustained by the renewal base.

Table 8: Q4 Monthly Fisher Licence Year-on-Year Percentage Change, FY2024/25 and FY2025/26

Q4 Month	FY2024/25 Total	FY2025/26 Total	Total Change	New Licence Change	Renewal Change
January	948	1,240	+30.8%	+42.9%	+27.4%
February	914	893	-2.3%	-3.2%	-2.0%
March	1,007	1,127	+11.9%	-21.2%	+25.8%
Q4 Total	2,869	3,260	+13.6%	+2.8%	+17.3%





The financial year followed a pattern of early strength, mid-year softening, and a strong year-end recovery. Q1 recorded 2,343 licences, making it the second-highest quarter of the year. Activity then declined in Q2 to 2,092 licences and remained relatively flat in Q3 at 2,055 licences. The year ended with a sharp improvement in Q4, when total licences increased to 3,260, the highest quarterly figure of FY2025/26. The main trend for FY2025/26 is that fisher licence activity was renewal-driven, with Q4 providing the strongest contribution to annual performance.

The new licence trend was more uneven than the renewal trend. New fisher licences declined from 676 in Q1 to 609 in Q2 and then fell further to 473 in Q3, before recovering strongly to 745 in Q4. This indicates that new licence activity weakened during the middle of the year but rebounded significantly in the final quarter. Despite this recovery, new licences accounted for only about one-quarter of total annual transactions, confirming that new licence issuance was not the dominant driver of total performance.



Photo 6: Male and Female Fishers tending to their nets.

Renewals showed greater volume and stronger overall influence on the annual result. Renewals decreased from 1,667 in Q1 to 1,483 in Q2, then increased slightly to 1,582 in Q3 before rising sharply to 2,515 in Q4. The Q4 renewal total alone represented approximately 34.7% of all renewals recorded during FY2025/26. This concentration of renewal activity in the final quarter suggests that compliance, expiry cycles, or operational timing may have contributed to a year-end surge in licence renewal processing.

The historical renewal-rate table shows that the proportion renewing from the previous year was 36% in 2026, based on the January-to-March period. This renewal-rate pattern suggests that while Q4 FY2025/26 produced a high number of renewal transactions in absolute terms, the percentage of fishers renewing from the previous year was 36%. In other words, the volume of renewals was strong, but the renewal rate suggests that a substantial portion of the previous-year licence base did not renew during January to March 2026. The result should therefore be interpreted as a strong operational quarter, but not necessarily as a full recovery to the exceptional renewal-rate levels observed in 2024 and 2025. As the year goes on, based on historical patterns, those licensed from January to March last year will return at some point in 2026 to renew. They do not always renew within the same quarter. By December, all are captured. The moratorium on licence fees resulted in an increase in renewals and new applications, as fishers capitalise on this incentive program.

YEAR	% renewing license from the previous year
2017	
2018	19%
2019	26%
2020	24%
2021	25%
2022	20%
2023	38%
2024	59%
2025	69%
*2026	36%
Average: 35%	

* Jan - Mar

Table 9: FISHER & VESSEL LICENCES RENEWAL %
ISSUED FROM 2018-2025. (EXCLUDING TEMPORARY PERMITS).





Overall, Q4 was the strongest period of FY2025/26 and was responsible for lifting the year-end performance. The quarter delivered a clear year-on-year improvement of +13.6%, driven mainly by renewed fisher licences. January and March were the main contributors to the Q4 gain, while February showed a small decline. The data therefore points to a positive closing quarter, supported by strong renewal activity rather than broad-based growth across every month and category.

For FY2025/26 as a whole, the trend indicates that fisher licence transactions were concentrated in renewals and strengthened sharply at year-end. The annual total of 9,750 licences demonstrates solid licensing activity, with renewals making up nearly three-quarters of the total. Future reporting may benefit from tracking whether remaining licence holders renew after March, and whether the strong Q4 renewal volume represents a temporary catch-up effect or the beginning of a sustained improvement in compliance and licence continuity.



Photo 8: Field Officers engaging a local fisher at a landing site.

Licences Issued by Parish

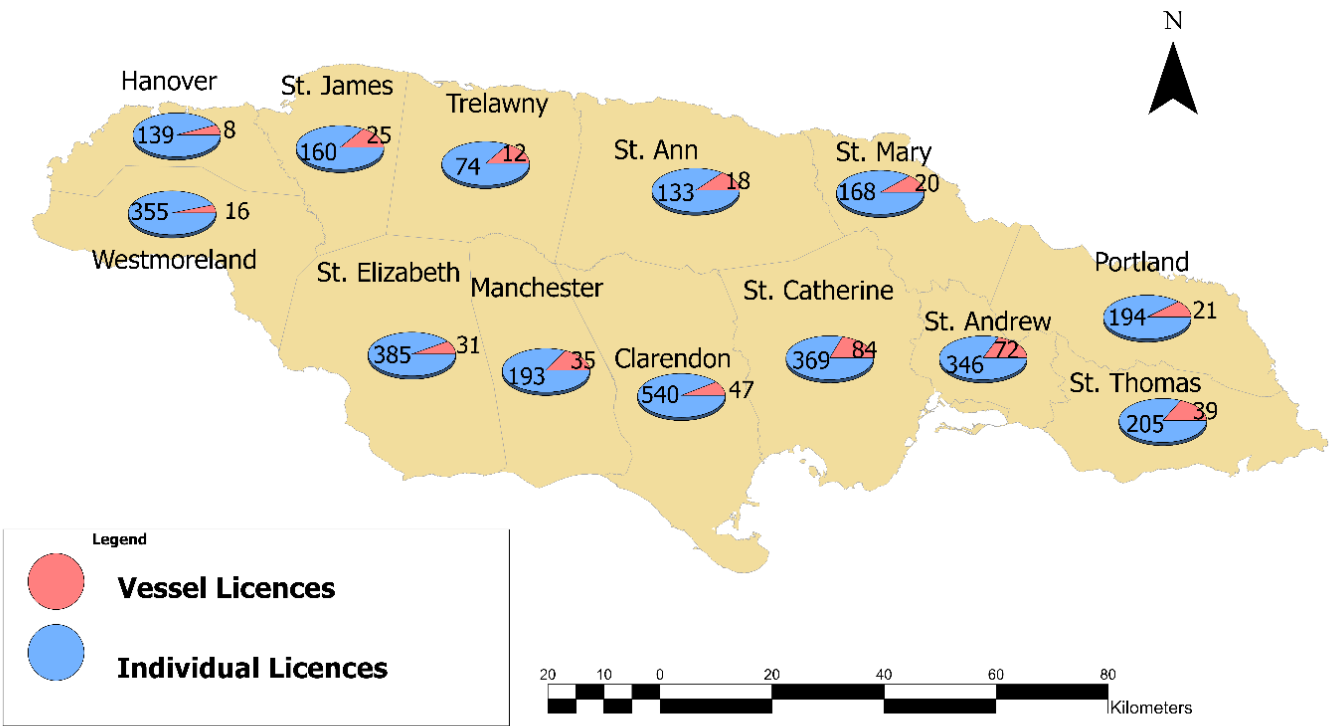


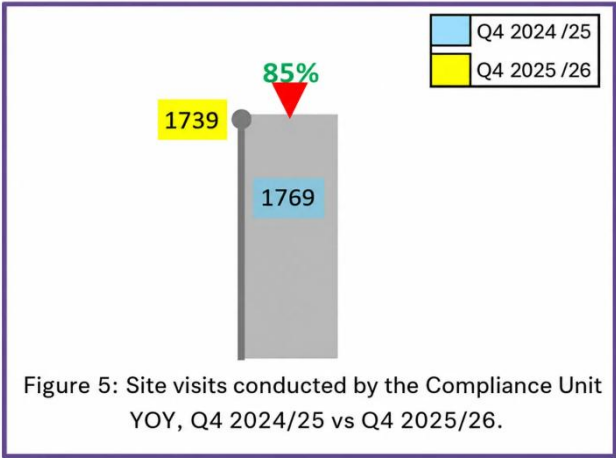
Figure 4: Vessel and Individual Licences issued by parish in Q4



Compliance



Photo 7: Dedicated sea patrols against the Q4 target.



40 Compliance Officers
Islandwide

Fisheries compliance and enforcement activities in Q4 FY2025/26, covering January–March 2026, showed a mixed but operationally important performance when compared with Q4 FY2024/25. The Compliance Unit maintained a strong field presence, recording 1,739 site visits executed during Q4 FY2025/26, compared with 1,769 site visits in Q4 FY2024/25. This represents a marginal year-over-year decline of approximately 1.7%, indicating that site visit activity remained broadly consistent with the previous year despite a slight reduction in total visits.

Indicator	Q4 2024/25	Q4 2025/26	Year-over-Year Change
Court hearings	2	13	+550.0%
Inspections executed	71	44	-38.0%
Joint operations / joint inspections	13	2	-84.6%
Products seized	209.05 lbs	24.60 lbs	-88.2%
Arrests	0	1	Increase from zero base
Site visits executed	1,769	1,739	-1.7%

Table 10: Q4 YoY comparison for key Compliance KPIs.

The most notable improvement occurred in court hearings, which increased from 2 in Q4 FY2024/25 to 13 in Q4 FY2025/26. This sharp increase suggests stronger follow-through on enforcement matters and greater movement of compliance cases through the adjudication process. The recording of one arrest in Q4 FY2025/26, compared with none in the prior-year quarter, also points to continued enforcement action where breaches were identified.

At the same time, some operational enforcement activities declined. Inspections executed fell from 71 to 44, a reduction of approximately 38.0%, while joint operations with JDF and JCF declined from 13 to 2, representing an 84.6% decrease. This indicates that although routine field coverage through site visits remained stable, the level of coordinated multi-agency enforcement activity was substantially lower than in the corresponding quarter of the previous financial year.





Product seizures also decreased significantly, falling from approximately 209.05 lbs in Q4 FY2024/25 to 24.60 lbs in Q4 FY2025/26. This represents an estimated decline of 88.2%. The reduction may reflect fewer detected infractions, changes in enforcement focus, reduced joint operational activity, or variations in illegal harvesting patterns during the quarter. Further review would be needed to determine whether the lower seizure volume reflects improved compliance or reduced interdiction intensity. Dedicated sea patrol performance reached 37% against the Q4 target, suggesting that maritime enforcement activity was present but below the desired quarterly benchmark.

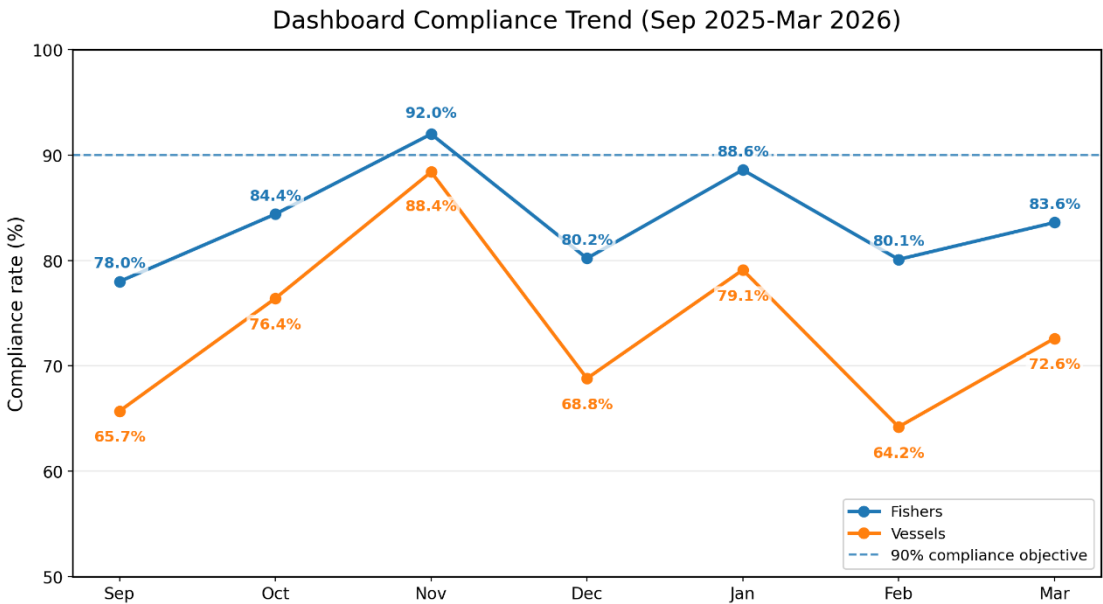


Photo 9: Typical at-sea operation.

Given the importance of sea patrols in detecting illegal fishing activity, particularly in areas that are less accessible through land-based site visits, this indicator should be monitored closely in future quarters.

Overall, Q4 FY2025/26 demonstrated sustained site visit coverage and stronger legal follow-through, but also showed reductions in inspections, joint operations, product seizures, and patrol-target achievement. Going forward, the Compliance Unit should maintain its high level of site visit coverage while strengthening coordinated enforcement with JDF and JCF, improving sea patrol execution against targets, and ensuring consistent documentation of inspection outcomes. This will help determine whether the reduced seizure levels are the result of improved sector compliance or a reduction in enforcement intensity.

From September 2025 to March 2026, the dashboard recorded 4,045 inspections, excluding sea patrols and 71 sea patrols. It recorded 5,060 fisher checks. Fisher compliance was 82.7%, while vessel compliance was 71.6%.



FUN FACTS ABOUT PRAWNS

1. Prawns are crustaceans related to shrimp, crabs, and lobsters.
2. They use long antennae to sense movement, food, and changes in the water.
3. Many prawns live close to the sea floor, hiding among sand, rocks, seagrass, or reefs.
4. Prawns are an important food source for fish, birds, and people.
5. Some prawns clean other sea animals by picking off parasites and dead skin.
6. Prawns are rich in protein and are enjoyed in many dishes around the world.
7. Prawns can swim both forwards and backwards using their swimmerets and tail fan.
8. Most prawns are omnivores, feeding on algae, plankton, and small organic matter.
9. Female prawns can carry thousands of eggs attached to their legs until they hatch.
10. Prawns play a vital role in the marine ecosystem as both predator and prey.





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. During Q4, artisanal fish production remained diverse, with recorded landings comprising a wide range of finfish species, including snappers, parrotfish, jacks, and grunts, as well as 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 more than eleven species identified, including Dog, Glasseye, Grey, Lane, Mutton, Red, Silk, Vermillion, and Yellowtail Snapper.

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

Table 11: COMMON FISH VARIETY CAUGHT PER PARISH IN Q4 2025/26.



BARACUDA



GROUPE



WRENCHMAN

	Month	Marine Finfish Production Estimate			Value Summary			Value Summary USD		
		Weight (MT)	Qtrly Fig (MT)	Quarter	Estimated Value J\$	Qtrly Estimate J\$	Quarter	Estimated Value USD	Qtrly Estimate USD	Quarter
2025	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	
2026	January	1,225.34		4th Quarter FY25/26	2,773,283,466.97		4th Quarter FY25/26	17,746,297.79		4th Quarter FY25/26
	February	683.44			1,546,808,946.16			9,898,062.18		
	March	1,290.15	3,198.93		2,919,952,323.70	7,240,044,736.83		18,684,834.82	46,329,194.79	
	TOTAL		11,913.11			26,979,929,212.63			172,534,290.39	

Table 12: ESTIMATED MARINE FINFISH PRODUCTION (MT) AND VALUE (USD), 2025 - 2026.



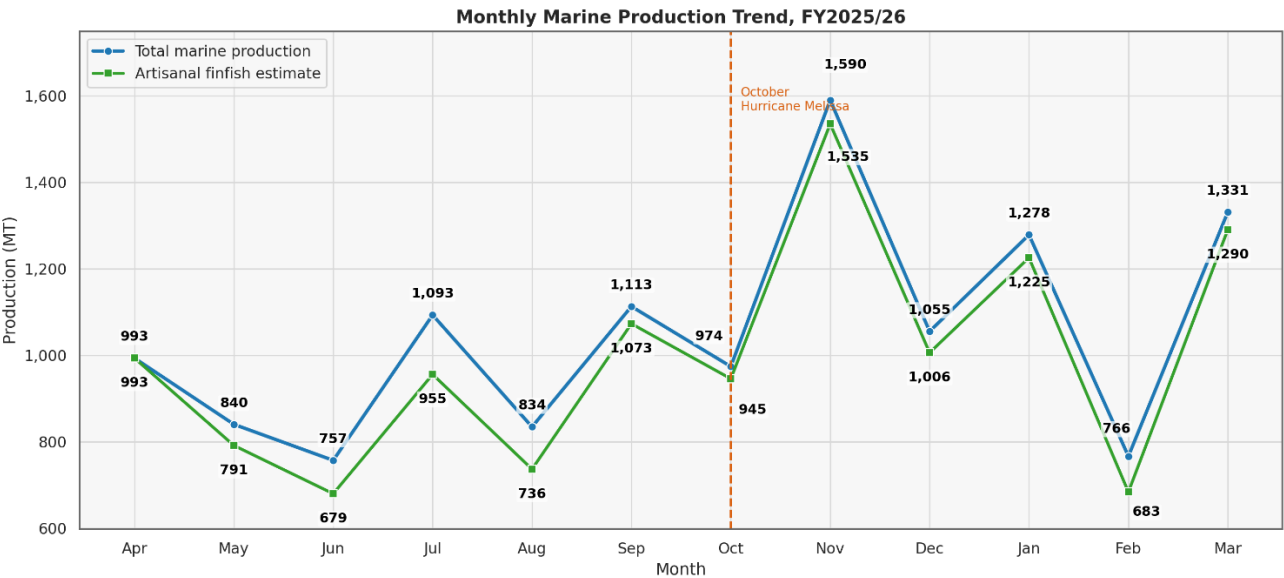


Table 12 provides the artisanal finfish production estimate, while Table 13 provides the broader total marine production summary by fishery.

Fishery	FY 2025/26												Total	% Composition
	April	May	June	July	August	September	October	November	December	January	February	March		
Artisanal finfish	993.18	791.10	679.47	955.42	736.28	1,072.67	945.42	1,534.90	1,005.74	1,225.34	683.44	1,290.15	11,913.11	94.37
Sea Cucumber													0.00	0.00
Industrial Conch		48.86	77.1	137.43	91.51							16.18	371.08	2.94
Industrial Spiny Lobster*				0.00	6.31	39.97	28.24	55.17	49.24	53.10	82.60	24.74	339.37	2.69
Total Marine Production	993.18	839.96	756.57	1092.85	834.10	1112.64	973.66	1590.07	1054.98	1278.44	766.04	1331.07	12,623.56	100

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

Table 13: ESTIMATED MARINE FINFISH PRODUCTION (MT) AND VALUE (USD), 2026.

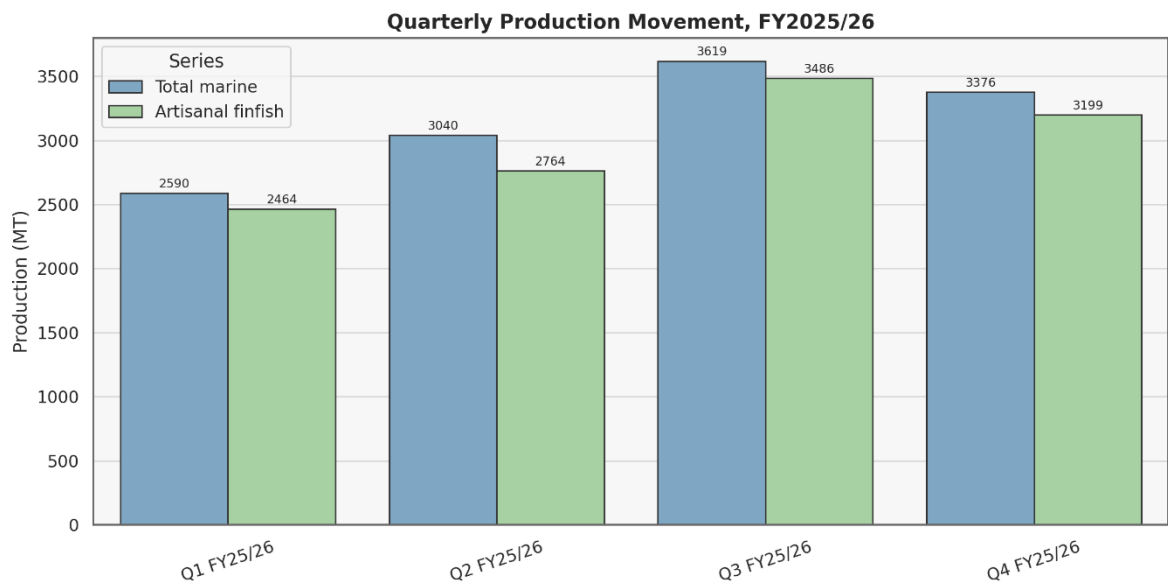


FY2025/26 total marine production amounted to 12,623.56 MT, valued at \$184,141,644. Artisanal finfish remained the main driver, accounting for 11,913.11 MT and \$172,534,290, while non-fish finfisheries added approximately 710.45 MT and \$11,607,354. Quarter to quarter, total marine production increased from 2,589.71 MT in Q1 to 3,039.59 MT in Q2, a gain of 449.88 MT (17.37%), and then rose further to 3,618.71 MT in Q3, an additional 579.12 MT (19.05%). Q4 then eased to 3,375.55 MT, a reduction of 243.16 MT (-6.72%) from Q3, but it remained 30.34% above Q1, showing that production was stronger in the second half of the fiscal year than at the beginning.

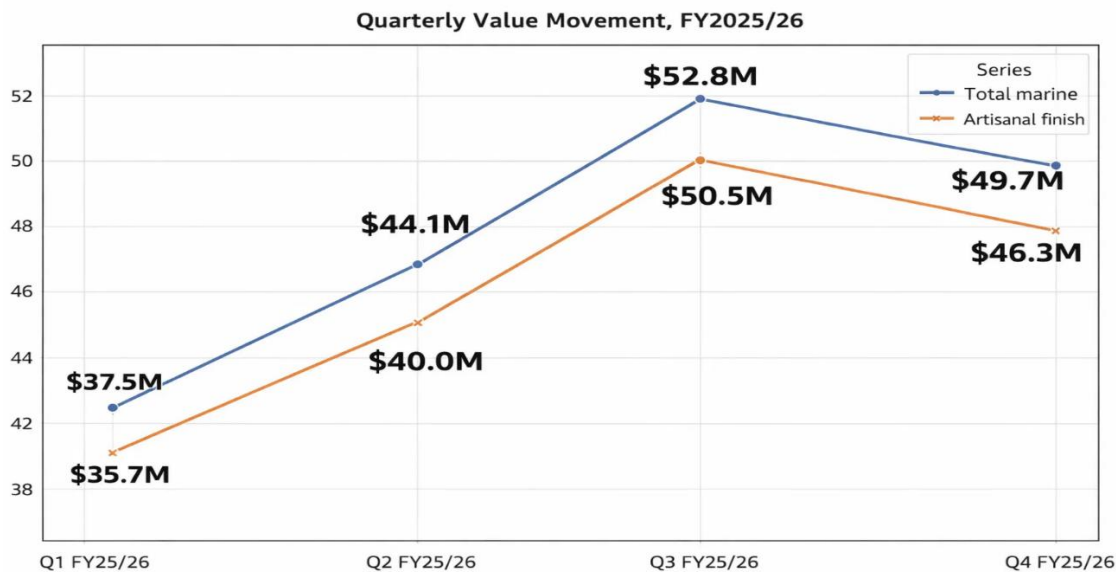
Quarter	Total Marine MT	Artisanal Finfish MT	Total Marine USD	Artisanal Finfish USD	Total MT QoQ Change	Total MT QoQ %	Total USD QoQ Change	Total USD QoQ %
Q1 FY25/26	2,589.71	2,463.75	\$37,486,933	\$35,681,833	—	—	—	—
Q2 FY25/26	3,039.59	2,764.37	\$44,132,181	\$40,035,591	+449.88	17.37%	+6,645,248	17.73%
Q3 FY25/26	3,618.71	3,486.06	\$52,826,066	\$50,487,671	+579.12	19.05%	+8,693,885	19.70%
Q4 FY25/26	3,375.55	3,198.93	\$49,696,465	\$46,329,195	-243.16	-6.72%	-3,129,601	-5.92%

Table 14:
Quarter over
Quarter change
comparison.





The value trend closely followed the production trend. Total value rose from USD\$37.4M (JMD\$5.9B) in Q1 to USD\$44.1M (JMD\$6.9B) in Q2, an increase of USD\$6.6M (JMD\$1.04 B) (17.73%), before reaching USD\$52.8M (JMD\$8.3B) in Q3, the highest quarterly value recorded in the FY2025/26 table. Q4 value then declined to USD\$49.6M (JMD\$7.8B), a fall of USD\$3.1M (-5.92%) (JMD\$491M) from Q3 but remained 32.57% above Q1. The finfish estimate shows the same pattern: finfish value moved from USD\$35.6M (JMD\$5.6B) in Q1 to USD\$40M (JMD\$6.3B) in Q2, then to USD\$50.4M (JMD\$7.96B) in Q3, before declining to USD\$46.3M (JMD\$7.3B) in Q4. This confirms that the Q4 moderation was not confined to the non-fisheries; it was also visible in the dominant artisanal finfish category.



The impact of Hurricane Melissa in October is reflected in the immediate contraction in the monthly data. Total marine production declined from 1,112.64 MT in September to 973.66 MT in October, a reduction of 138.98 MT (-12.49%), while total value declined from \$16,239,777 to \$14,190,087, a fall of \$2,049,690 (-12.62%). In the finfish estimate, October also declined from 1,072.67 MT in September to 945.42 MT, a reduction of 127.25 MT (-11.86%). This pattern is consistent with short-term disruption to fishing activity, landings, beach access, and market movement during the hurricane period. However, the effect appears to have been temporary, as November rebounded sharply to 1,590.07 MT, up 616.41 MT (+63.31%) from October, while value increased by \$9,012,012 (+63.51%).

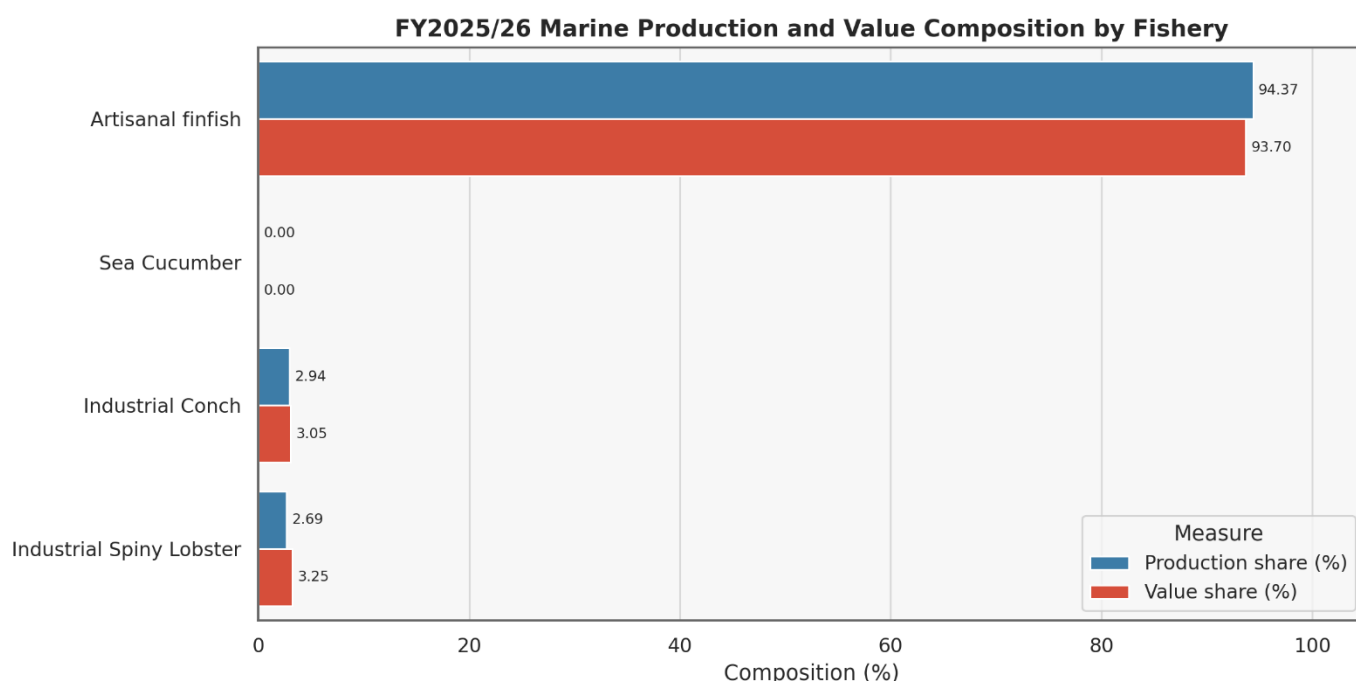




Q4 Month	Total Marine_MT	MT MoM_Change	MT MoM_%	Total Marine_USD	USD MoM_Change	USD MoM_%
Jan	1,278.44	+223.46	+21.18%	\$18,682,355	+3,248,475	+21.05%
Feb	766.04	-512.40	-40.08%	\$11,358,062	-7,324,293	-39.20%
Mar	1,331.07	+565.03	+73.76%	\$19,656,048	+8,297,986	+73.06%

Table 15: ESTIMATED MARINE FINFISH PRODUCTION (MT) AND VALUE (USD), 2026.

From a full-year composition perspective, FY2025/26 remained highly concentrated in artisanal finfish, which represented 94.37% of production and 93.70% of value. Industrial conch contributed 371.08 MT (2.94%) and \$5,620,941 (3.05%), while industrial spiny lobster contributed 339.37 MT (2.69%) and \$5,986,412 (3.25%). Although these non-fish fishery were small by tonnage, their combined value share of 6.30% was slightly higher than their combined production share of 5.63%, indicating a relatively stronger value contribution per unit of volume.



Overall, FY2025/26 showed a rising trajectory through Q3 followed by a moderate Q4 decline. Q3 was the peak quarter for total marine production and value, while Q4 ranked second despite the weak February outcome of 766.04 MT and \$11,358,062. The Q4 movement was mixed: January was relatively strong at 1,278.44 MT, February fell sharply by 512.40 MT (-40.08%), and March recovered by 565.03 MT (+73.76%) to 1,331.07 MT. The year therefore reflects strong second-half performance, a visible but temporary October weather shock associated with post-Hurricane Melissa rebound, and continued dependence on artisanal finfish as the dominant production and value base.

Fishery	Production MT	MT Composition %	Value_USD	USD_Composition_%
Artisanal finfish	11,913.11	94.37%	\$172,534,290	93.70%
Sea Cucumber	0.00	0.00%	\$0	0.00%
Industrial Conch	371.08	2.94%	\$5,620,941	3.05%
Industrial Spiny Lobster	339.37	2.69%	\$5,986,412	3.25%

Table 16: MARINE SPECIE PRODUCTION (MT), COMPOSITION (%) AND VALUE (USD).





Aquaculture Production

During Q4 FY2025/26, estimated tilapia production amounted to 115.00 MT, with an estimated value of J\$164,812,310.39 or US\$1,049,762.30. This represented a decline of 11.29 MT or -8.9% compared with Q3, when production stood at 126.29 MT. Estimated JMD and USD values followed the same pattern, moving down by 8.9% for both. Q4 accounted for 20.6% of annual tilapia production and was the lowest-producing quarter of the financial year, indicating continued weakening in production volumes over the latter half of the year.

The Q4 result was also weaker than the comparable Q4 FY2024/25 estimate of 143.35 MT. Production therefore declined by 28.35 MT, or 19.8%, year over year. The annual comparison shows a similar pattern: estimated FY2025/26 production of 557.34 MT was 70.33 MT lower than the estimated 627.67 MT recorded for FY2024/25, representing an 11.2% decline. The year-over-year contraction was visible across the available quarterly comparisons, including Q2, where production fell from 165.16 MT to 146.21 MT, and Q3, where production fell from 145.61 MT to 126.29 MT.

For FY2025/26, tilapia production was estimated at 557.34 MT, generating J\$798,752,113.67 or US\$5,087,604.52 in estimated value. The annual trend shows a steady quarterly contraction, moving from 169.84 MT in Q1 to 115.00 MT in Q4, a cumulative reduction of 54.84 MT or -32.3% from the opening quarter. Quarter-to-quarter production fell by 13.9% in Q2, 13.6% in Q3, and 8.9% in Q4. The same directional movement was reflected in the value estimates, as quarterly JMD value declined from J\$243,381,436.11 in Q1 to J\$164,812,310.39 in Q4.



Photo 11: Fish Farmers conducting field activities by their ponds.

The monthly production profile shows that output was strongest in June (74.92 MT) and July (64.50 MT), before easing through September. Production recovered in October 2025 to 55.71 MT but then declined to 41.95 MT in November and 28.63 MT in December. Hurricane Melissa occurred in October 2025, the subsequent softening in November and December should be interpreted with caution: storm-related disruption may have affected farm operations, pond management, harvesting schedules, access roads, input movement, market access, and the timing of production reporting. Although January temporarily improved to 50.73 MT, Q4 still closed below Q3 because February and March remained comparatively low at 38.20 MT and 26.07 MT, respectively.

Performance against operational targets was mixed. Fish produced from aquaculture reached 557.34 MT, representing 66.8% of the annual target of 833.95 MT, and was therefore recorded as delayed. Tilapia seedstock production was also off target, with 390,802 produced against an annual target of 980,000, equivalent to 39.9% achievement; the performance note indicates that broodstock replacement is required and is being pursued. In contrast, pond acreage reached 557.75 acres, or 101.4% of the target, while renovated ponds reached 12 ponds, or 150.0% of the target. Farmer training also performed above target, with 116 existing farmers trained against a target of 100 and 83 prospective farmers trained against a target of 50.

Overall, the aquaculture programme demonstrated strong support-service performance but weaker biological production performance. The main production indicator and seedstock indicator remained below target, while interventions related to pond acreage, pond rehabilitation, post-larvae activity, and farmer training were either on track or above annual targets. Compared with FY2024/25, FY2025/26 production was lower at the annual level and in the available quarterly comparisons, with the sharpest quarter-on-quarter year-over-year decline observed in Q4. The financial-year pattern therefore points to a need to strengthen production recovery measures, particularly broodstock replacement, hatchery output, post-hurricane farm restoration, and support to farms affected by operational disruption. These areas will be important for improving production continuity and reversing the downward movement observed across FY2025/26.





Figure 6. Monthly Tilapia Production Trend

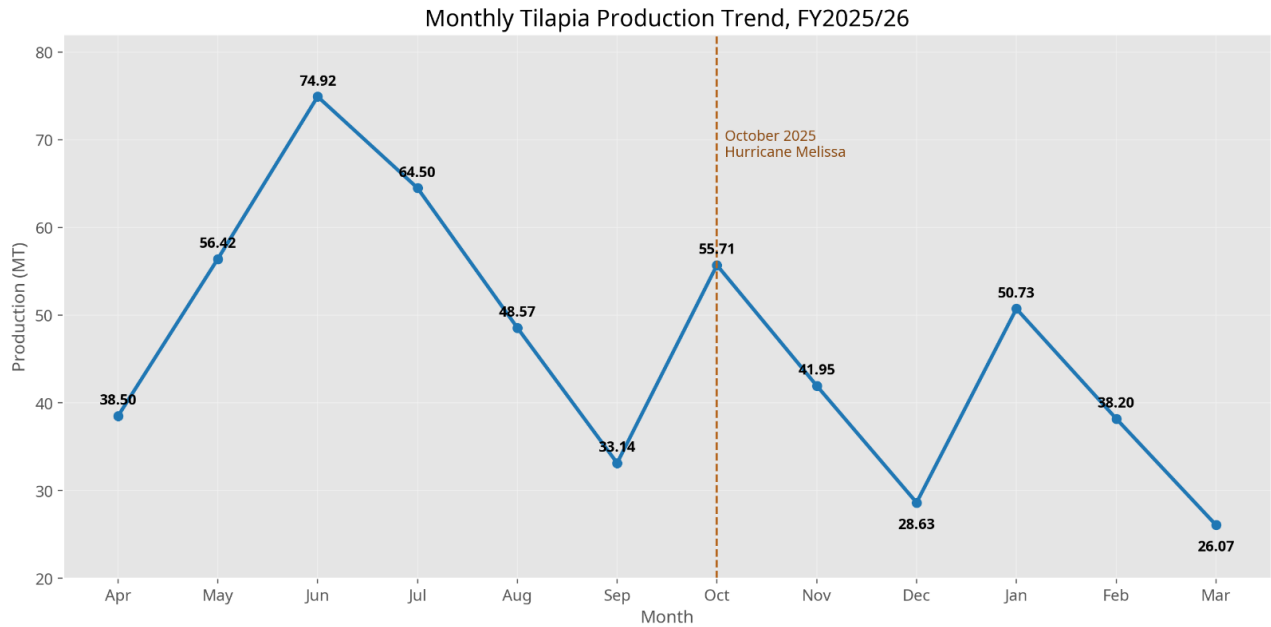
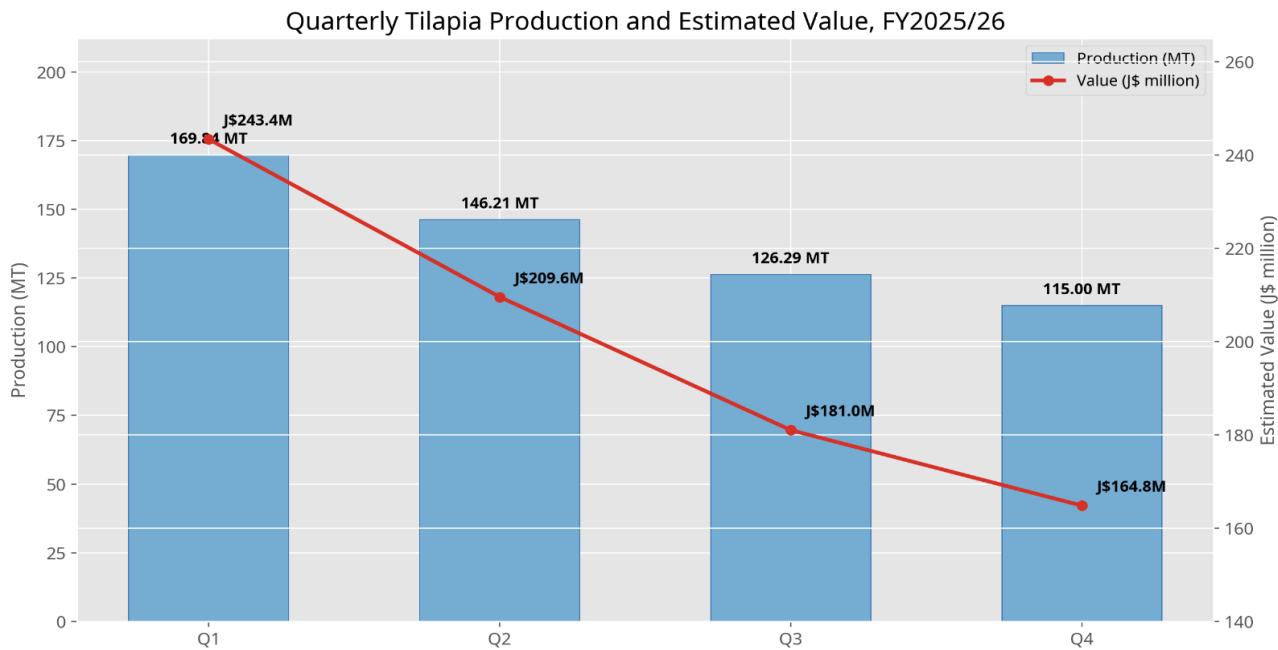


Figure 7. Quarterly Tilapia Production and Estimated Value



		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	April	38.50		1st	55,170,661.93		1st	351,405.49		1st Quarter
	May	56.42		Quarter	80,850,098.46		Quarter	514,968.78		FY25/26
	June	74.92	169.84	FY25/26	107,360,675.72	243,381,436.11	FY25/26	683,825.96	1,550,200.23	FY25/26
	July	64.50		2nd	92,442,590.67		2nd	588,806.31		2nd Quarter
	August	48.57		Quarter	69,621,130.33		Quarter	443,446.69		FY25/26
	September	33.14	146.21	FY25/26	47,490,550.06	209,554,271.06	FY25/26	302,487.58	1,334,740.58	FY25/26
	October	55.71		3rd	79,845,895.91		3rd	508,572.59		3rd Quarter
	November	41.95		Quarter	60,124,489.92		Quarter	382,958.53		FY25/26
2026	December	28.63	126.29	FY25/26	41,033,710.28	181,004,096.11	FY25/26	261,370.29	1,152,901.41	FY25/26
	January	50.73		4th	72,703,726.14		4th	463,082.10		4th Quarter
	February	38.20		Quarter	54,746,350.06		Quarter	348,703.65		FY25/26
	March	26.07	115.00	FY25/26	37,362,234.19	164,812,310.39	FY25/26	237,976.55	1,049,762.30	FY25/26
TOTAL			557.34			798,752,113.67			5,087,604.52	





Figure 8. Quarterly Production Movement

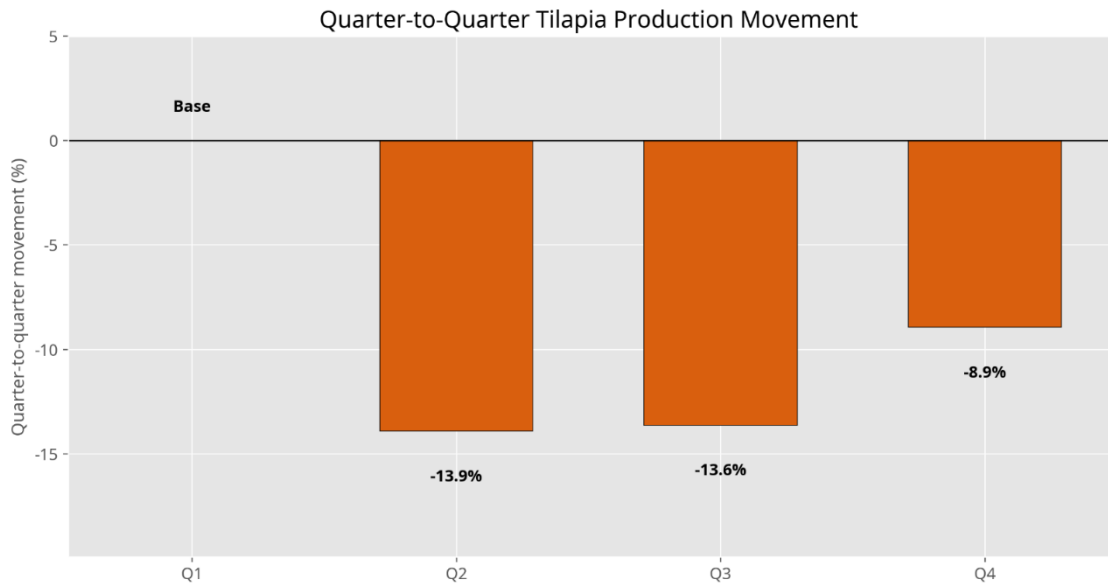
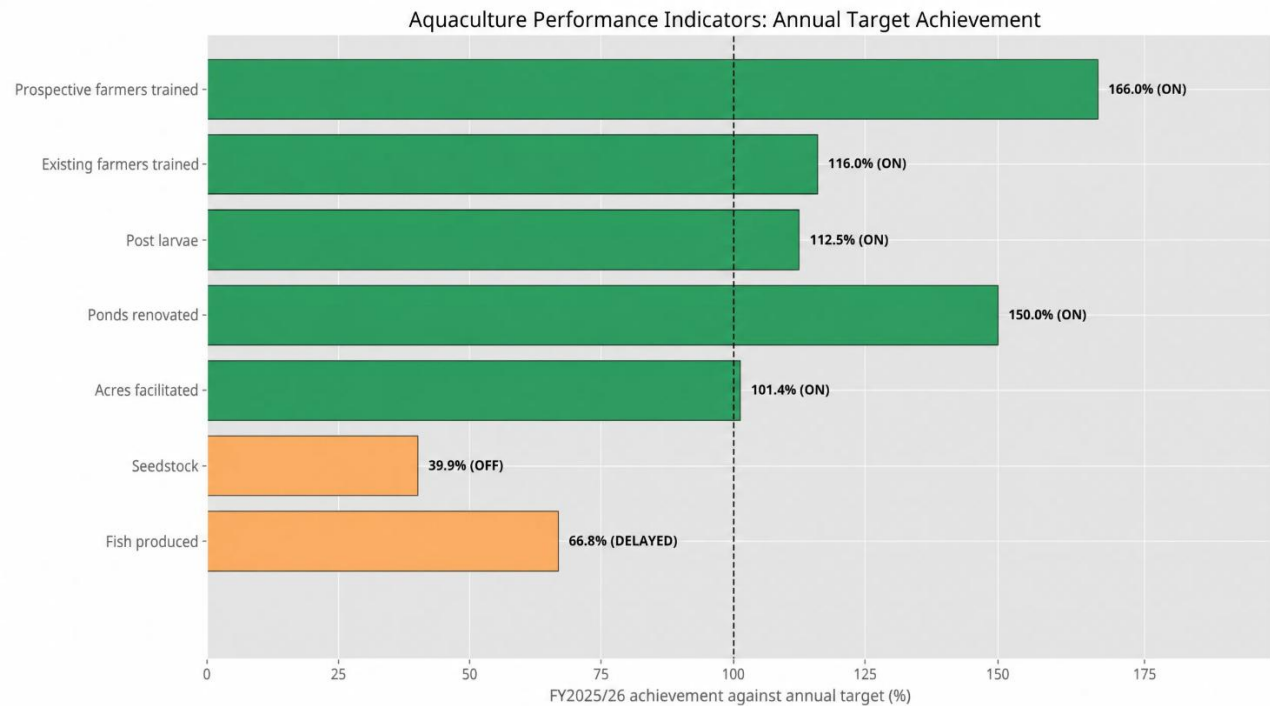


Figure 9. Annual Target Achievement by Aquaculture Indicator



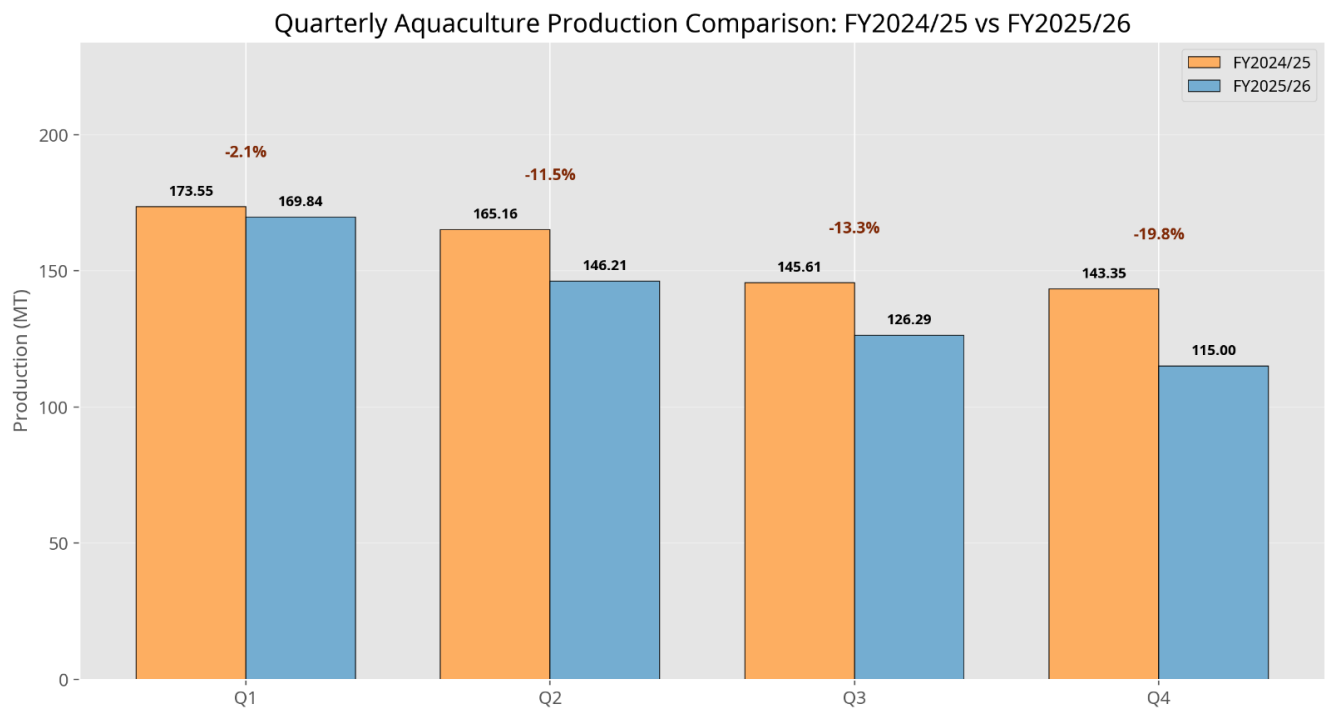
Quarter	FY2024/25 Production (MT)	FY2025/26 Production (MT)	Absolute Change (MT)	Percentage Change
Q1	173.55	169.84	-3.71	-2.1%
Q2	165.16	146.21	-18.95	-11.5%
Q3	145.61	126.29	-19.32	-13.3%
Q4	143.35	115.00	-28.35	-19.8%
Annual	627.67	557.34	-70.33	-11.2%

Table 18: FY2024/25 and FY2025/26 Production Comparison.





Figure 10. FY2024/25 and FY2025/26 Quarterly Production Comparison



Fish Farms and Registered Fish Farmers by Parish

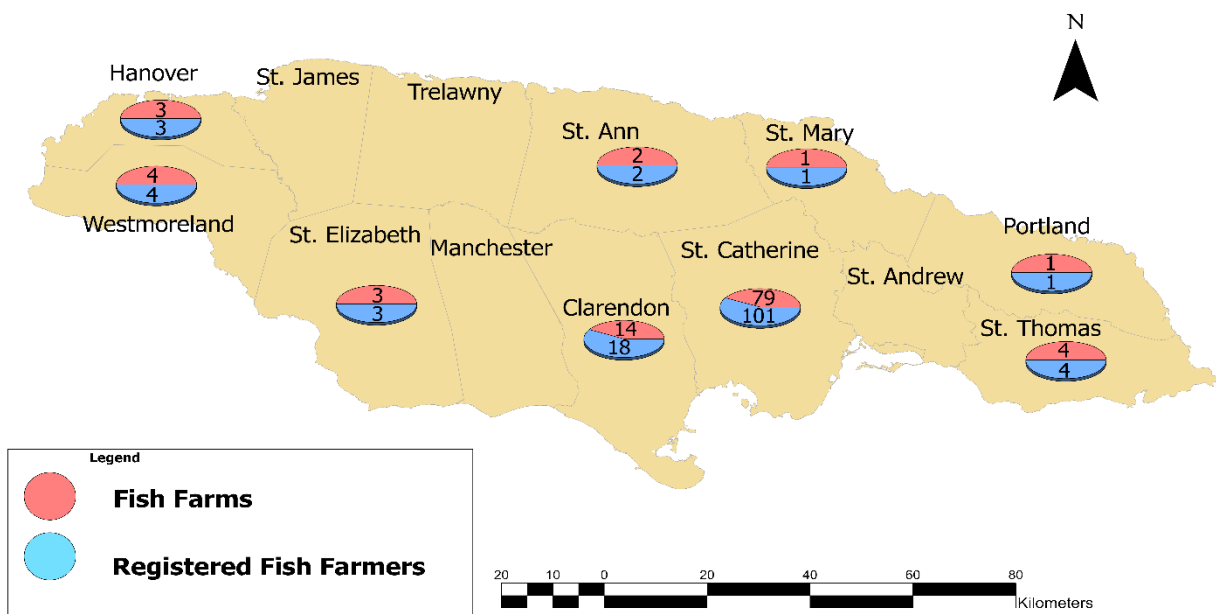


Figure 11: Fish farms and registered fish farmers in Q4 2025/26 by parish.



EXPORT FACTS ABOUT JAMAICA PRAWNS



Jamaica Prawn Export Information

Jamaica's prawn-specific export trade is currently modest and highly concentrated. In 2024, Jamaica exported US\$44.7 thousand of frozen shrimps and prawns, while importing US\$8.13 million, producing a net import position of about US\$8.09 million. The largest reported export market was the Cayman Islands, followed by Trinidad and Tobago, Barbados, Austria and The Bahamas. The wider crustacean category is much larger, at US\$14.0 million in exports in 2024, but that broader grouping includes other products such as lobster and crab.

2024 Prawn Exports

US\$44.7k

Frozen shrimps & prawns

2024 Prawn Imports

US\$8.13M

Net importer by US\$8.09M

Top Export Market

Cayman Is.

US\$32.9k | 73.6% share

2024 Export Destinations: Frozen Shrimps & Prawns

Cayman Islands		US\$32.9k	73.6%
Trinidad & Tobago		US\$6.7k	14.9%
Barbados		US\$2.1k	4.8%
Austria		US\$1.9k	4.3%
Bahamas		US\$1.1k	2.4%



Market Context and Production Pipeline

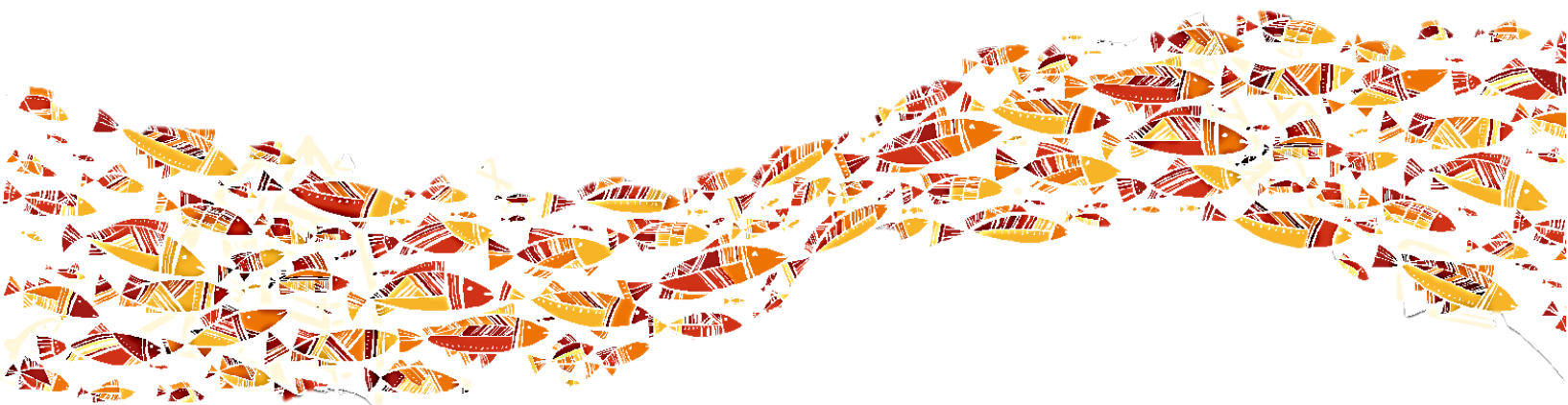
The available trade evidence suggests that Jamaica's prawn export activity is emerging rather than established. Regional island markets currently dominate reported frozen shrimp and prawn exports, while local aquaculture capacity is being strengthened through NFA's 2025 giant freshwater prawn pilot at Twickenham Park Hatchery. If farmer trials mature into commercial supply, future opportunities may include fresh or frozen tails, whole prawns, and value-added processed products for hotels, restaurants and nearby Caribbean markets.

Prawn Products





BIOLOGICAL DATA MARINE SPECIES





The Q4 biological review was revised to focus on lobster weight, morphometric measurements, and sex composition rather than the previous Q3 framing. The updated dataset combined the newly supplied lobster biological records with existing biological sheets, then removed duplicate records before summarising the Q4 2025 subset. Across all loaded lobster biological sheets, 18,760 raw rows were reviewed. The Q4 2025 analytical subset contained 441 measured lobster records, of which 403 records had known sex.

Data-processing item	Result
Raw biological rows loaded	18,760
Q4 2025 records analysed	441
Q4 2025 records with known sex	403
Male records in Q4 2025 known-sex subset	304
Female records in Q4 2025 known-sex subset	99
Male-to-female ratio in Q4 2025	3.07:1

Table 19: Data set processing quantities.

The Q4 sample was strongly male-dominated. Males accounted for 75.4% of records with known sex, while females represented 24.6%. This Q4 sex profile differs from the full 2025 cleaned sample, where the male-to-female ratio was lower at 1.16:1, indicating that the Q4 biological sample was not evenly distributed between sexes. This does not by itself confirm a stock-level sex imbalance because biological monitoring samples may be influenced by trip timing, landing site coverage, fishing practice, market selection, or recording coverage. However, it is a useful Q4 indicator and should be tracked alongside future samples to determine whether the pattern persists.

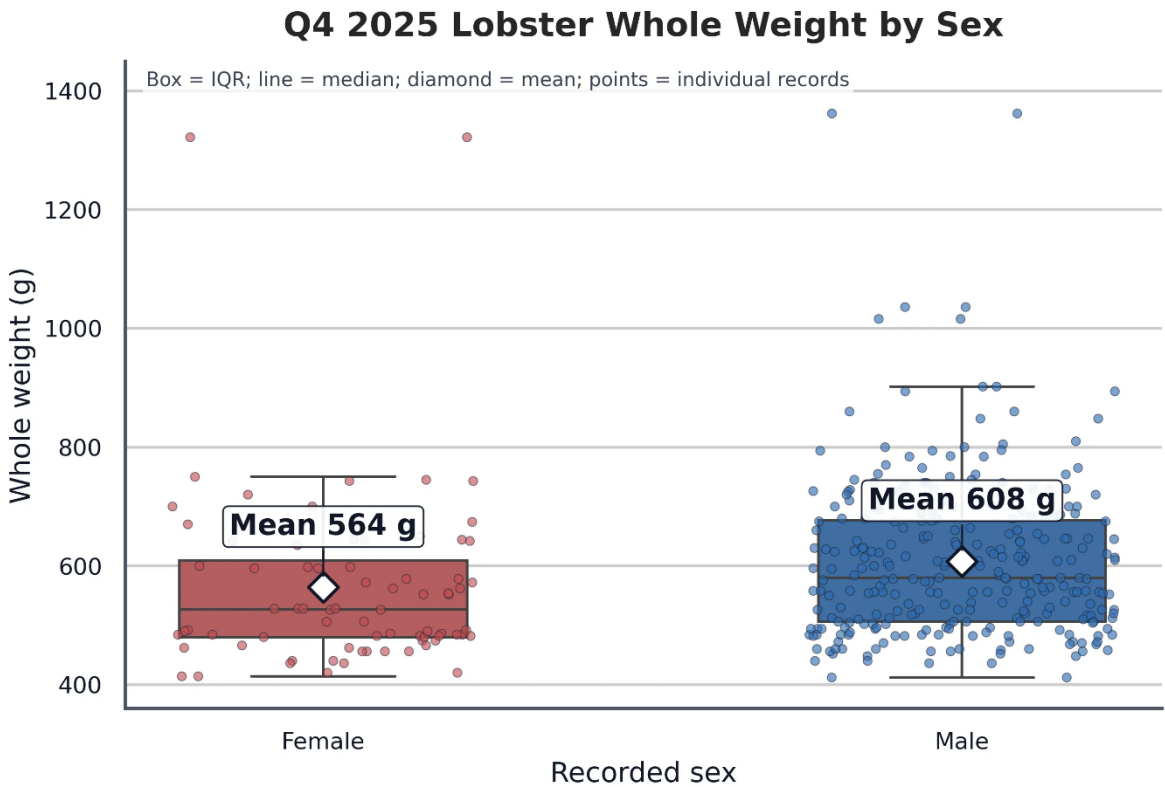


Figure 12. Q4 2025 lobster whole-weight distribution by sex.





The weight distribution showed that Q4 males were slightly heavier on average than females, although the two groups overlapped substantially. The mean whole weight across the Q4 records with usable weight data was 600.41 g, with a median of 577 g. The female mean whole weight was 564.12 g, compared with 607.89 g for males. The presence of several high-weight records, including observations above 1,300 g, increased the mean relative to the median and demonstrates why the updated figure uses a box-and-jitter design rather than a simple bar chart. This design keeps the central tendency visible while also showing the spread of individual records.

Q4 2025 measurement	Records with data	Mean	Median	Standard deviation	Minimum	Maximum
Carapace length (cm)	390	8.98	9.00	0.77	5.60	11.90
Tail length (cm)	441	15.24	15.00	1.24	12.90	21.30
Telson length (cm)	441	4.79	4.70	0.56	3.90	6.80
Body depth (cm)	390	6.38	6.40	0.57	5.10	8.70
Whole weight (g)	390	600.41	577.00	136.57	412.00	1,362.00
Tail weight (g)	51	230.02	210.00	63.23	160.00	490.00

Table 20: Lobster Q4 2025 measurement.

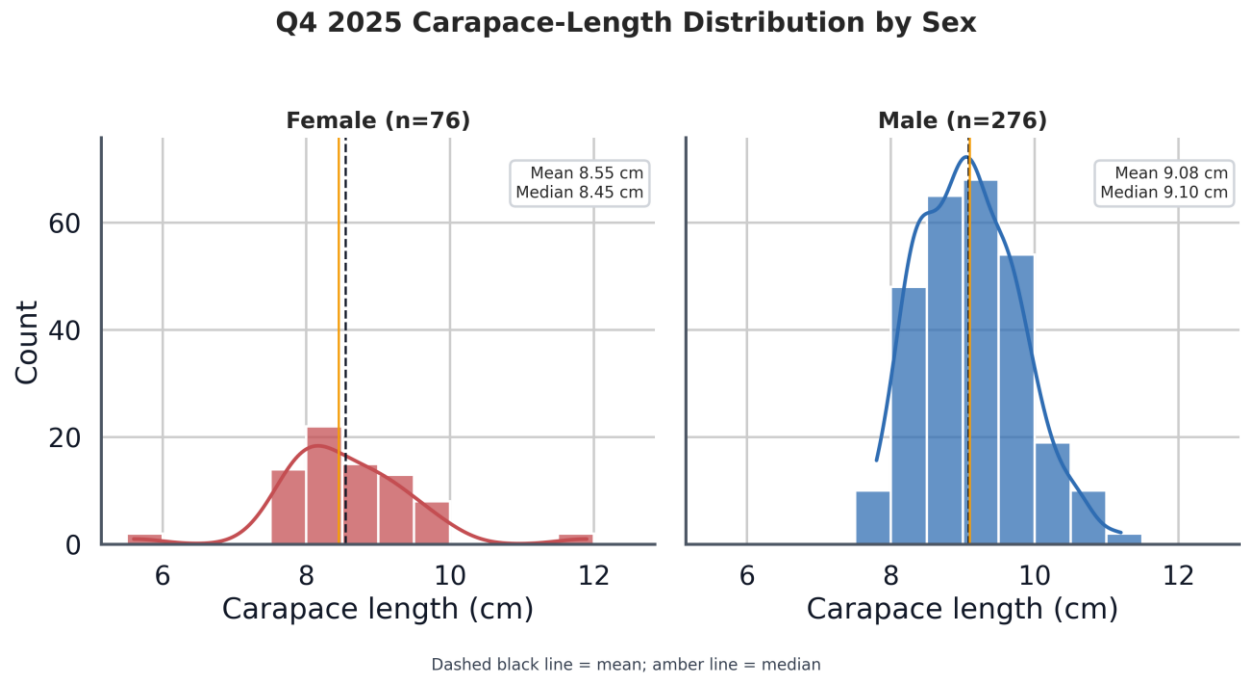


Figure 13. Q4 2025 carapace-length distribution by sex with mean and median reference lines.

The carapace-length distribution provides a more direct biological comparison than weight alone because carapace length is a standard lobster morphometric measure. In Q4, males had a mean carapace length of 9.08 cm, while females had a lower mean of 8.55 cm. The median pattern was similar, with males at 9.10 cm and females at 8.45 cm. The female distribution was also more variable, partly because the female subset was smaller and included both low and high observations. This pattern supports a cautious interpretation: males in the Q4 sample were, on average, somewhat larger and heavier, but the biological distributions overlapped and should not be interpreted as completely separate size classes.



Sex	Carapace length mean (cm)	Whole weight mean (g)	Tail length mean (cm)	Telson length mean (cm)	Body depth mean (cm)	Tail weight mean (g)
Female	8.55	564.12	15.38	5.04	6.23	213.48
Male	9.08	607.89	15.09	4.65	6.42	243.61

Table 21: Lobster sex data from the biological assessment done.

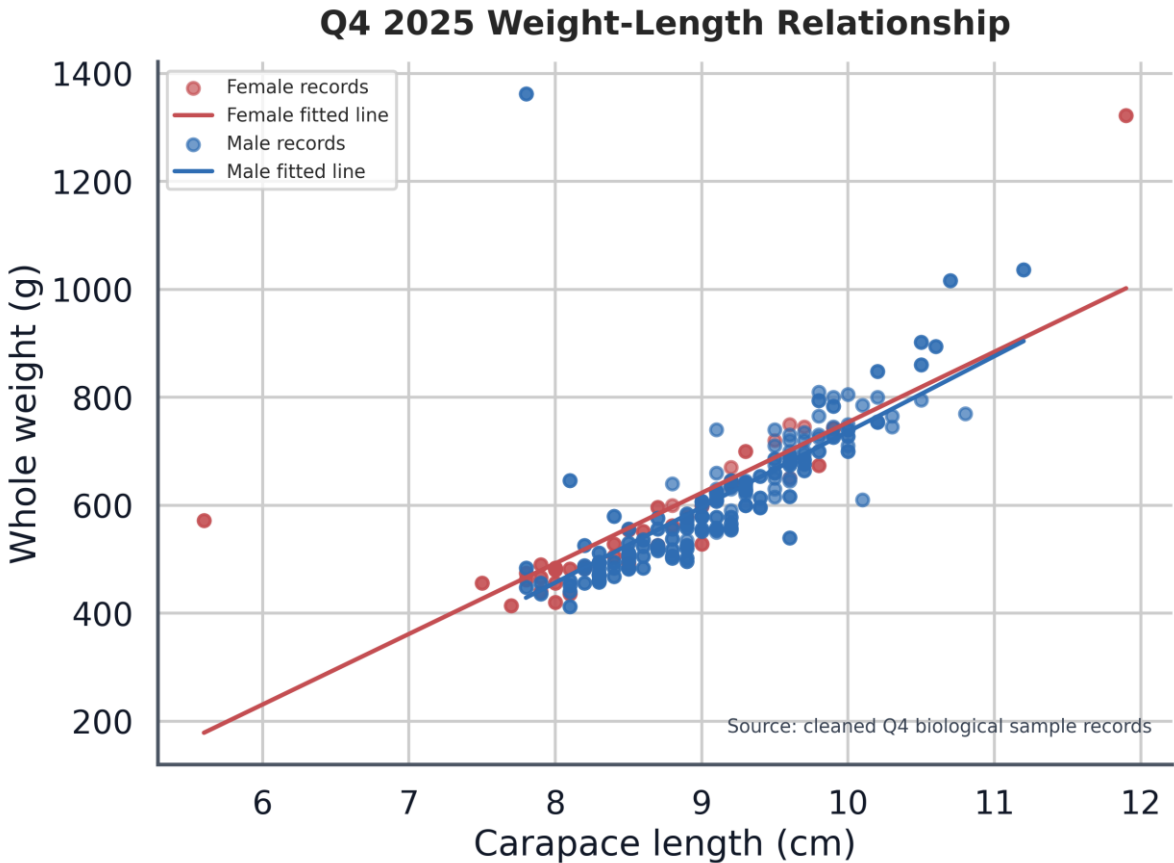


Figure 14. Q4 2025 whole weight versus carapace length with sex-specific fitted trend lines.

The weight-length graph shows the expected positive relationship between carapace length and whole weight. Most observations clustered between approximately 8.0 cm and 10.0 cm carapace length and between roughly 450 g and 750 g whole weight. The fitted lines for males and females followed a broadly similar upward pattern, although interpretation of the female line should remain cautious because the female subset was smaller and more affected by outlying records. The figure is therefore most useful as a biological data-quality and monitoring tool: it confirms that the cleaned Q4 records show a coherent weight-length structure while making outliers visible for later review rather than hiding them.



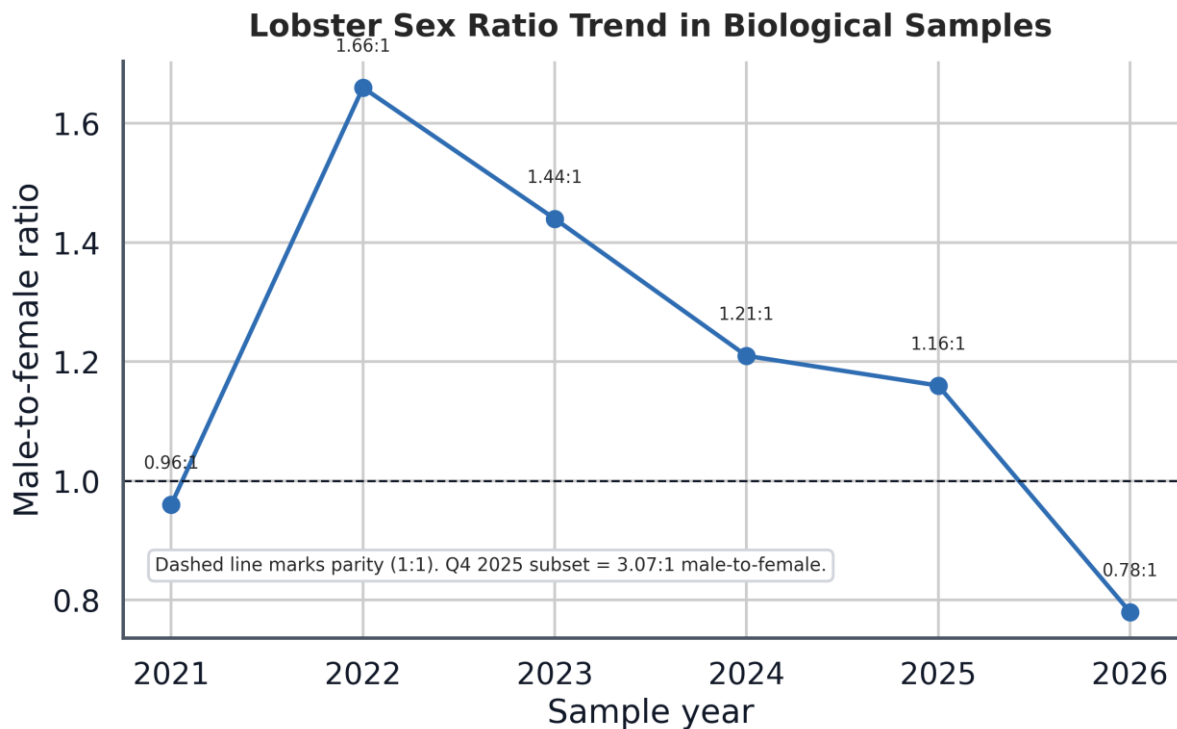


Figure 15. Annual male-to-female ratio trend in cleaned lobster biological samples, with parity marked for reference.

The annual cleaned dataset shows that the full-year male-to-female ratio has varied over time. The 2021 cleaned sample was close to parity at 0.96:1, while 2022 and 2023 were more male-dominated at 1.66:1 and 1.44:1, respectively. The full-year 2025 ratio was 1.16:1, which means the Q4 2025 ratio of 3.07:1 was notably higher than the broader annual value. For the Q4 report, this makes sex composition a key monitoring point, especially if Q4 sampling was concentrated in particular landing sites, fishing trips, or market channels.

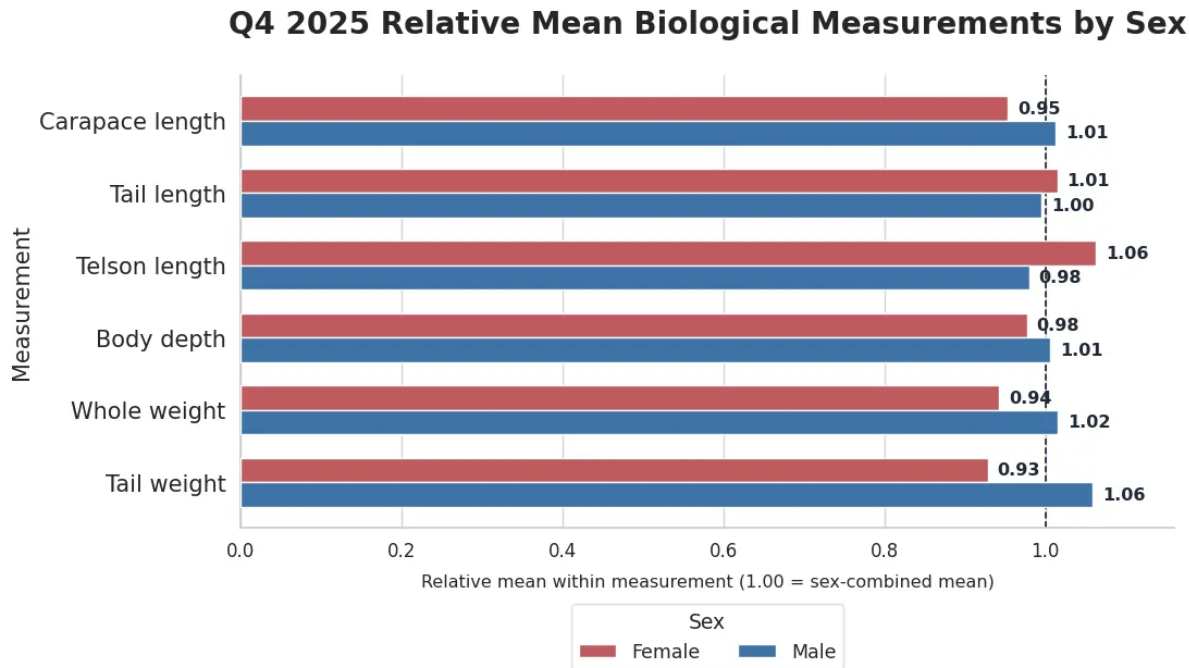


Figure 16. Relative mean biological measurements by sex, standardized within each measurement category.





The relative measurement comparison highlights where the sexes differed most clearly in the Q4 subset. Males recorded higher mean whole weight, tail weight, body depth, and carapace length. Females recorded slightly higher average tail length and telson length in the cleaned Q4 subset. These differences should be interpreted as sample-level biological patterns, not as definitive population parameters, because the Q4 sex composition was uneven and the tail-weight field was only available for 51 records. The main analytical value of the figure is that it consolidates multiple biological measurements into a single visual profile that can be compared with future quarters.

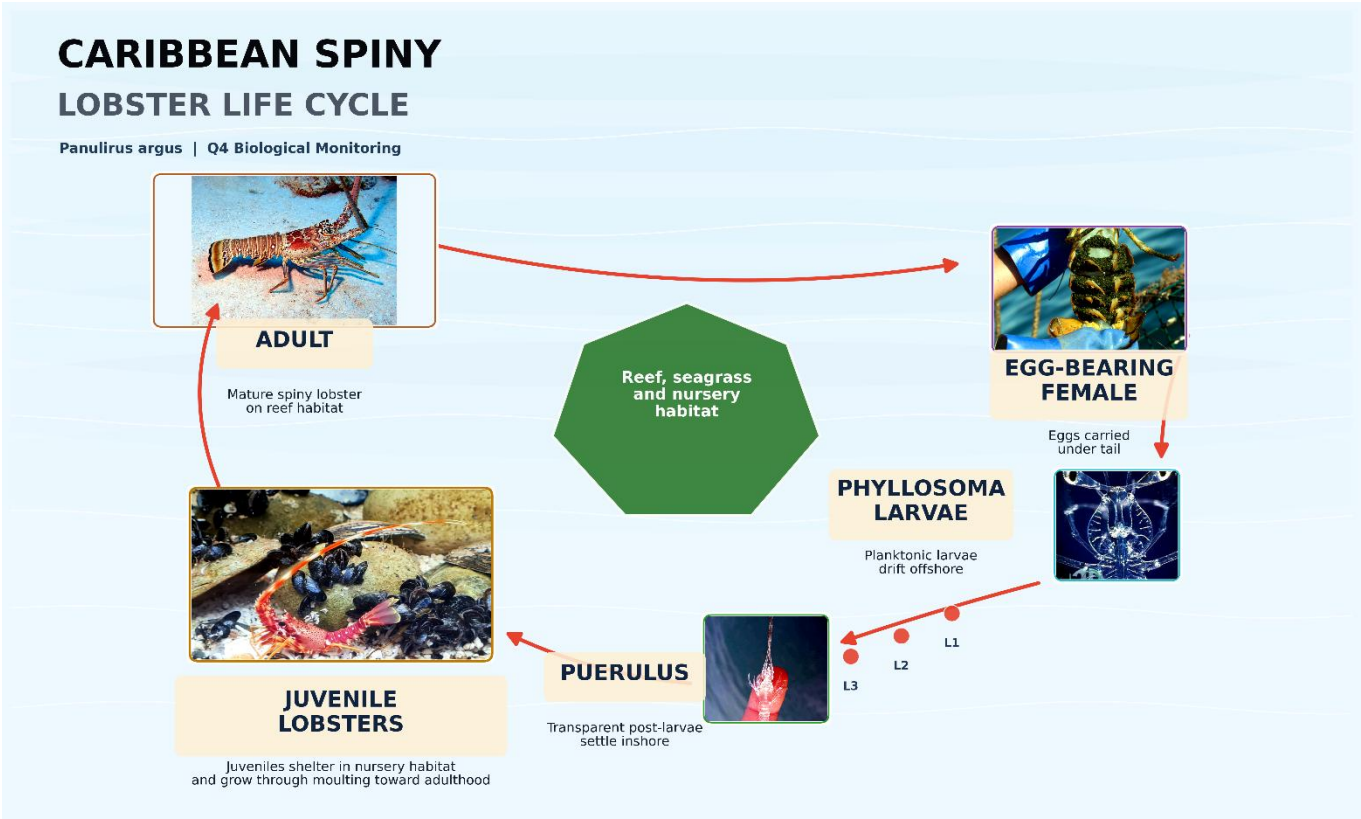


Figure 17. Lobster lifecycle diagram replacing the previous conch lifecycle figure.

For Q4, lobster biological sampling indicates a male-dominated sample and a generally coherent relationship between carapace length and whole weight. The cleaned Q4 subset contained 441 records, with known-sex records showing 304 males and 99 females. Average whole weight was 600.41 g, and average carapace length was 8.98 cm. Males were slightly larger and heavier on average, with a mean carapace length of 9.08 cm and a mean whole weight of 607.89 g, compared with 8.55 cm and 564.12 g for females. The updated graphs use box-and-jitter, faceted distribution, regression scatter, annual trend, and relative-measurement designs to provide a stronger analytical presentation than the previous Q3 figure style.



Photo 12: Biological assessment being done on a lobster.



SOCIOECONOMIC OVERVIEW





Photo 13. Artisanal fishing activity at sea.

Q4 FY2025/26 recorded 3,256 licensed fishers in the age-and-licence table, comprising 743 new licences and 2,513 renewals. This was 387 records higher than Q4 FY2024/25 (2,869), representing year-over-year growth of 13.5%. New licences increased by 17 records (2.3%), while renewals increased by 370 records (17.3%).

Compared with Q3 FY2025/26, total licensed fishers increased from 2,055 to 3,256, a gain of 1,201 records or 58.4%. For FY2025/26, the four quarters accounted for 9,746 licence records, of which 2,501 (25.7%) were new licences, and 7,245 (74.3%) were renewals. Q4 alone represented 33.4% of annual licensing activity, making it the strongest quarter of the fiscal year.

Table 22. Licensed Fishers by Quarter, FY2025/26

Quarter	Period	New	Renewal	Total	New Share (%)	Renewal Share (%)	QoQ Change	QoQ Change (%)
Q1 FY2025/26	Apr-Jun 2025	676	1,667	2,343	28.9	71.1	0	nan
Q2 FY2025/26	Jul-Sep 2025	609	1,483	2,092	29.1	70.9	-251	-10.7
Q3 FY2025/26	Oct-Dec 2025	473	1,582	2,055	23.0	77.0	-37	-1.8
Q4 FY2025/26	Jan-Mar 2026	743	2,513	3,256	22.8	77.2	1,201	58.4

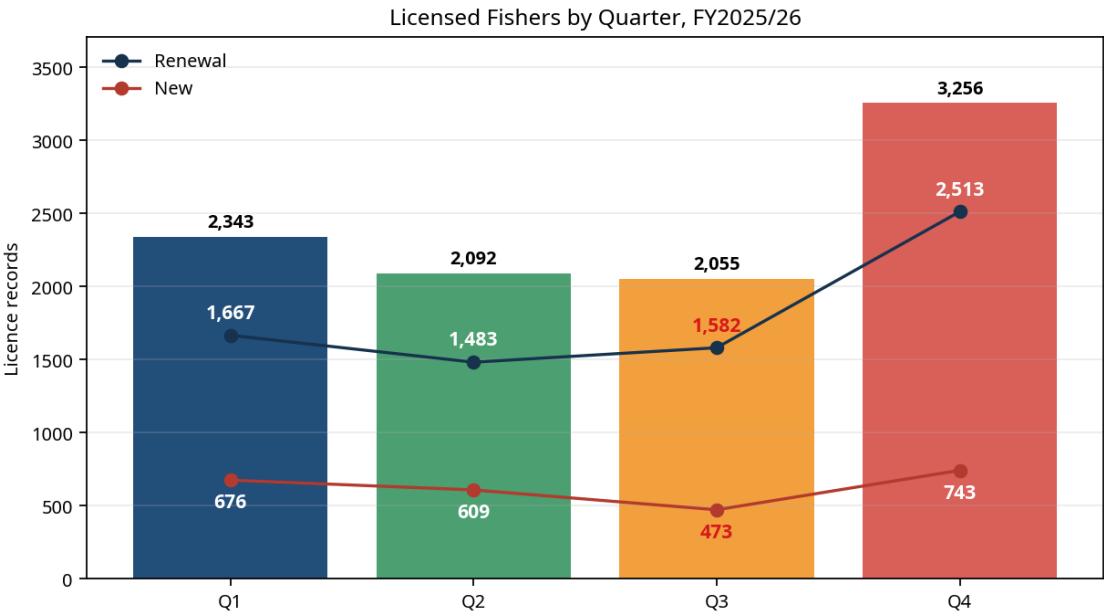


Figure 18. Quarterly licensed fisher movement, FY2025/26.





The Q4 sex-distribution table records 3,261 licensed fishers for January–March 2026, consisting of 2,881 males (88.3%) and 380 females (11.7%). In monthly terms, total licence records moved from 1,240 in January to 893 in February and 1,128 in March. Male records were highest in January and March, while female records declined steadily from 143 in January to 113 in March.

Female records accounted for 11.7% of the Q4 sex table, compared with 8.8% in Q3 and 9.6% in Q4 FY2024/25. In numerical terms, female records increased by 199 from Q3 to Q4 and by 105 year over year, while male records increased by 1,007 from Q3 to Q4 and by 287 year over year. These figures show that licence continuity strengthens with age, while younger fishers remain more dependent on new-entry dynamics and may require focused support for retention, safety, and market access.

Q4 differs from Q3, when the sex table recorded 1,874 males and 181 females out of 2,055 licence records. Relative to Q3, male records increased by 1,007 (53.7%), while female records increased by 199 (109.9%). Compared with Q4 FY2024/25, the Q4 FY2025/26 sex table shows an overall increase of 392 records (13.7%).

Table 23. Sex Distribution of Licensed Fishers, January–March 2026

Sex	January	February	March	Total	Share of Quarter (%)
Male	1,097	769	1,015	2,881	88.3
Female	143	124	113	380	11.7

Table 24. Sex Distribution Comparison: Q4 vs Q3 and Year over Year

Sex	Q3 Total	Q4 Total	Q4 FY2024/25 Total	Q4 vs Q3 Change	Q4 vs Q3 Change (%)	YoY Change	YoY Change (%)
Male	1,874	2,881	2,594	1,007	53.7	287	11.1
Female	181	380	275	199	109.9	105	38.2

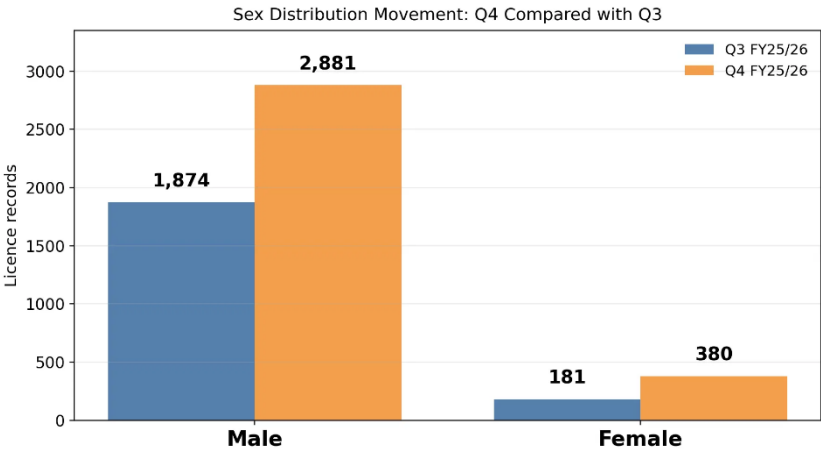


Figure 19. Sex distribution movement between Q3 and Q4.



Photo 14. Licensing and fisher registration





The Q4 age profile shows that the 36–55 group remained the largest cohort, with 1,428 licence records or 43.9% of the quarter. The 56 & Older group accounted for 1,126 records (34.6%), while the 17–35 group accounted for 702 records (21.6%). Renewals dominated every age group, especially among older fishers, where 85.8% of records were renewals.

The Q4-versus-Q3 movement shows expansion across all age groups. The 17–35 group rose by 213 records (43.6%), the 36–55 group rose by 518 records (56.9%), and the 56 & Older group rose by 470 records (71.6%). The strongest absolute increase occurred among the 56 & Older and 36–55 cohorts, indicating that Q4 growth was driven primarily by mid-career and older fishers returning through renewals, while the younger group also strengthened through both new and renewed licences. Year-over-year interpretation is positive at the total level, with Q4 FY2025/26 exceeding Q4 FY2024/25 by 387 records.

Table 25. Age Distribution of Licensed Fishers, New and Renewed Licences, January–March 2026

Age Group	New	Renewal	Total	Share (%)	Renewal Rate (%)
17-35	273	429	702	21.6	61.1
36-55	310	1,118	1,428	43.9	78.3
56 & Older	160	966	1,126	34.6	85.8

Table 26. Age Distribution Movement: Q4 Compared with Q3

Age Group	Q3 Total	Q4 Total	Change	Change (%)
17-35	489	702	213	43.6
36-55	910	1,428	518	56.9
56 & Older	656	1,126	470	71.6

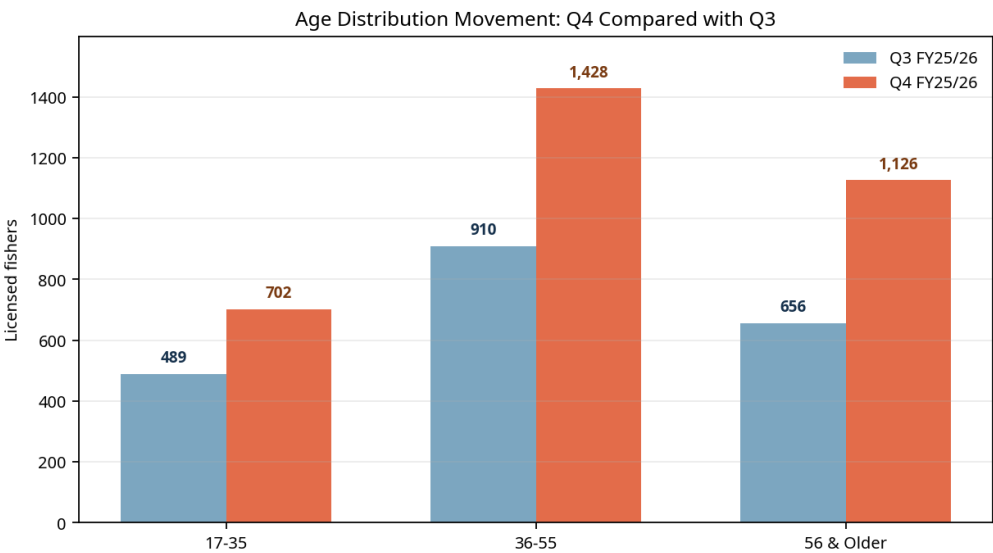


Figure 20. Age distribution movement between Q3 and Q4 FY2025/26.



Photo 15. Fresh fish display and market activity.





Gross Domestic Product (GDP) Status

The GDP reference value remains unchanged for the Q4 update. Fishing GDP is shown at US\$193.24M (JMD\$30.6B) in 2025, compared with US\$207.53M (JMD\$32.8B) in 2024. This represents a year-over-year movement of -6.9%. Fishing represented 0.87% of total GDP and 12.97% of Agriculture, Forestry and Fishing in 2025.

Table 27. GDP Contribution Based on Basic Prices, 2018–2025

Year	Total GDP	Agriculture, Forestry & Fishing	Fishing	Fishing % of Agriculture	Fishing % of Total GDP
2018	\$15,650.65	\$1,014.84	\$94.58	9.3%	0.6%
2019	\$15,810.81	\$1,018.94	\$111.02	10.9%	0.7%
2020	\$13,880.88	\$1,004.30	\$109.04	10.9%	0.8%
2021	\$14,670.67	\$1,087.60	\$90.16	8.3%	0.6%
2022	\$17,100.04	\$1,185.94	\$116.29	9.8%	0.7%
2023	\$19,420.00	\$1,117.90	\$209.68	18.8%	1.1%
2024	\$20,586.00	\$1,752.70	\$207.53	11.8%	1.0%
2025	\$22,310.00	\$1,490.20	\$193.24	13.0%	0.9%

Note: Values are shown as US\$ million unless stated as a percentage.

The data show that fishing GDP remained above the 2018–2022 range despite easing from the 2023–2024 peak. This suggests that the sector retained a higher output base than in the pre-2023 period, while still showing softness relative to the two most recent peak years.

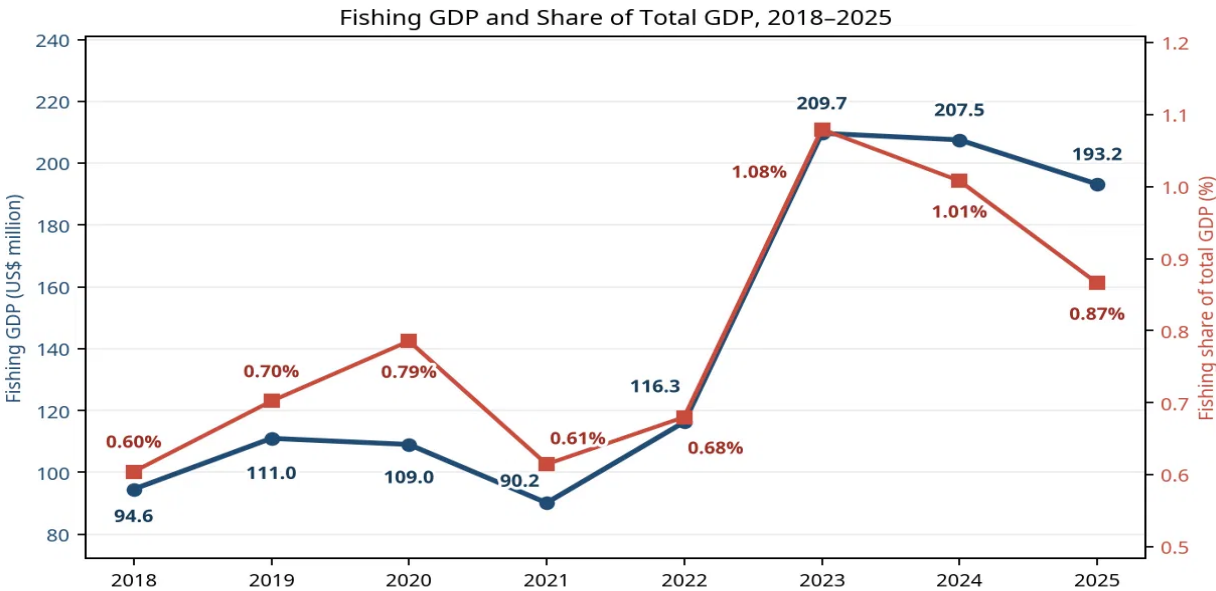


Figure 21. Fishing GDP and share of total GDP, 2018–2025.



Photo 16. Fish handling and landing-site activity.



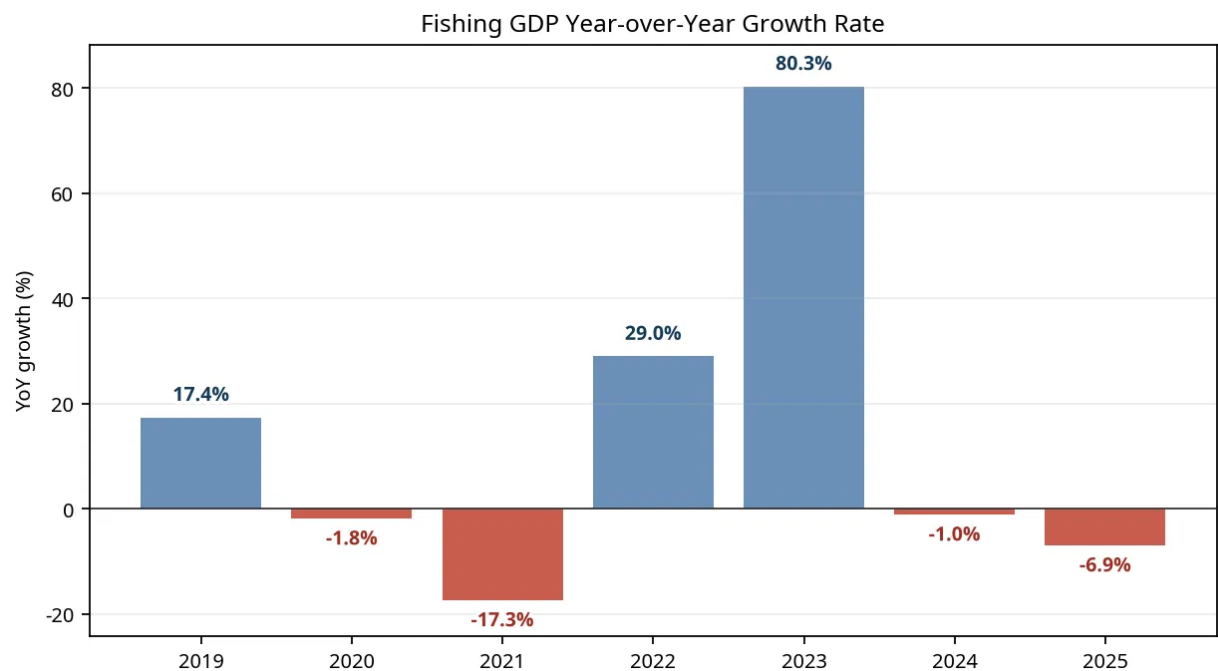


Figure 22. Fishing GDP year-over-year growth rate.

Fish Price Index

Q4 price table shows the highest species-group average for Snappers at J\$1,153/lb, followed by Parrots at J\$990/lb and Grunts at J\$934/lb. Parish-level variation remained visible, with northern and north-western parishes such as St. James, Trelawny, and St. Mary continuing to show comparatively high values for several reef-fish groups.

Table 28. Average Fish Prices by Species Group, Q4 FY2025/26

Species Group	Q4 Average Price (JMD/lb)
Snappers	1,153.30
Parrots	990.30
Grunts	934.20
Jacks	988.80
Tunas	917.70
Kingfish	968.20

The price distribution remains consistent with a locally supplied market dominated by reef fish species and supported by offshore pelagic species. Snappers, Parrots, and Grunts continue to indicate strong consumer demand for reef-associated fish, while Tunas and Kingfish remain important but more uneven across parishes because several parish/species observations are blank in the source structure.



Photo 17. Seafood Restaurant menu board, commercial activity.

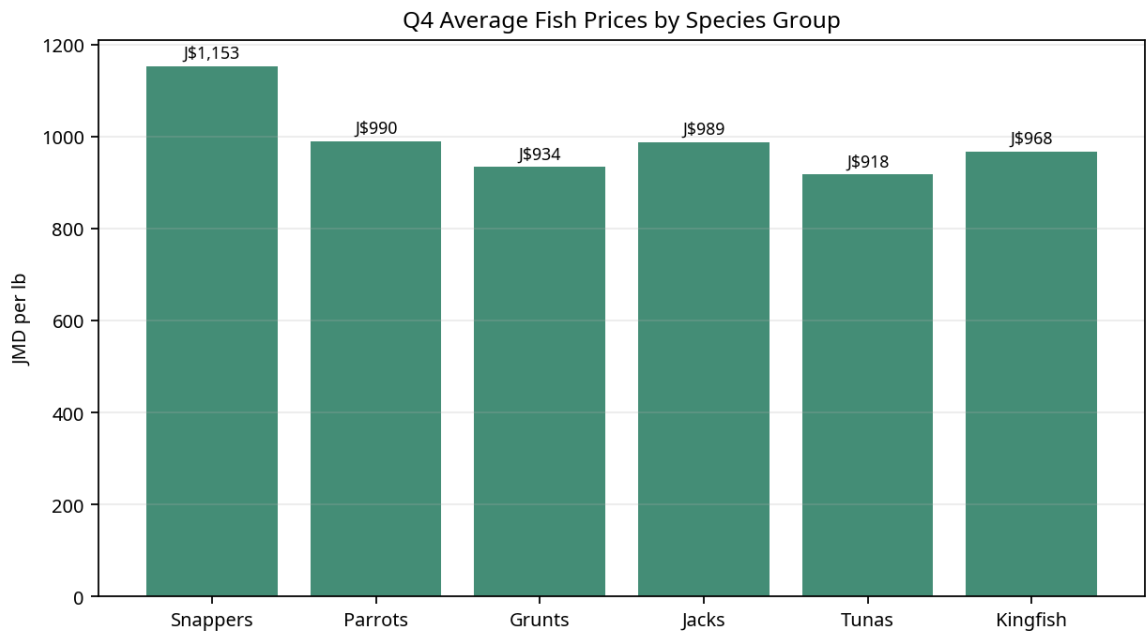


Figure 23. Average Q4 fish prices by species group.

Table 29. Updated Fish Prices by Parish, Q4 FY2025/26 (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	1,010	1,124	897.00	1,145.00	852	1,124	1,066	1,145				
Hanover	1,004	1,134	815.00	1,113.00	879	1,134	1,014	1,336	865.00	907.00		
Kingston & St. Andrew	985	1,145	890.00	899.00	630	801	918	1,124			779.00	899.00
Manchester	1,107	1,113	699.00	681.00	903	1,113	1,043	1,134	1,030.00	1,113.00		
Portland	1,100	1,348	997.00	1,145.00	853	899	939	916	716.00	562.00	850.00	916.00
St. Catherine	1,385	1,134			787	794	458	445				
St. Elizabeth	1,058	1,145	1,050.00	1,124.00	865	1,145	1,113	1,124				
St. Mary	1,459	1,336	1,231.00	1,361.00	1,176	1,336	814	681	618.00	556.00		
St. Thomas	1,112	1,124	1,098.00	1,145.00	1,068	1,124	978	1,145			896.00	916.00
St. Ann	1,115	1,134	1,081.00	1,113.00	1,009	1,134	977	1,113				
St. James	1,327	1,374	1,320.00	1,348.00	1,273	1,374	1,285	1,348	1,315.00	1,374.00		
Trelawny	1,268	1,336	1,280.00	1,361.00	1,288	1,336	1,239	1,134	1,145.00	1,336.00	1,348.00	1,361.00
Westmoreland	1,063	1,124	526.00	572.00	561	562	1,010	1,374	735.00	674.00		

Blank cells indicate that no parish/species value was available at the time of the survey.

Overall, Q4 presents a sector with strong licensing recovery, a high renewal base, continued concentration among experienced fishers, and a production profile that remained stronger in the second half of the fiscal year than at the beginning.



Photo 18. Fish vendor displaying her catch and price.





CONCLUSION





FY 2025/26 closed with a mixed but broadly resilient performance across Jamaica's fisheries sector. The strongest year-end result was recorded in fisher licensing, where Q4 became the highest-output quarter of the financial year and lifted the annual total to 9,750 fisher licence transactions. This was a renewal-led performance, with renewals accounting for approximately 74.3% of annual fisher licensing activity and 77.2% of Q4 activity. The result suggests that licence continuity strengthened at year-end, in addition to the moratorium on licence fees.

Vessel licensing showed a different pattern. Q4 improved by 19.6% compared with Q3, rising to 428 vessel licence transactions, but it remained 27.8% below Q4 FY 2024/25. The full-year total of 1,954 vessel transactions was dominated by renewals, which represented 80.9% of annual vessel licensing activity. The statistical implication is clear: overall vessel licensing performance depends heavily on renewal retention. Strengthening reminder systems, field follow-up, renewal processing support, moratorium on licence fees and late-quarter engagement with vessel owners should therefore be treated as a priority for FY 2026/27.

Production performance also points to both strengths and risks. Total marine production reached 12,623.56 MT, valued at approximately US\$184.14 million. Production rose through Q3 before moderating in Q4 to 3,375.55 MT, but the Q4 level remained above Q1 and Q2, confirming a stronger second half overall. Artisanal finfish continued to dominate the sector, accounting for more than 94% of marine production and nearly 94% of value. In contrast, aquaculture production weakened throughout the year, with tilapia production declining from 169.84 MT in Q1 to 115.00 MT in Q4 and reaching only 66.8% of the annual production target. This divergence indicates that capture fisheries retained relatively stronger year-end momentum, while aquaculture requires targeted recovery actions.

The forecast outlook for FY 2026/27 is cautiously positive but conditional. If the Q4 renewal momentum is sustained, fisher licence transactions are expected to remain above the mid-year FY 2025/26 levels, with the strongest performance likely where renewal follow-up is timely and field support remains active. Vessel licensing is expected to recover gradually from the Q3 low, but the forecast remains sensitive to March-style renewal drop-offs. Marine production is expected to remain broadly stable, with quarterly fluctuations linked to weather, fishing effort, and market access, while aquaculture recovery will depend on broodstock replacement, hatchery output, pond productivity, and post-disruption farm support. Overall, the next reporting year should focus on converting Q4 recovery into sustained annual performance, reducing renewal volatility, restoring aquaculture output, and maintaining high-quality data collection for evidence-based fisheries management.

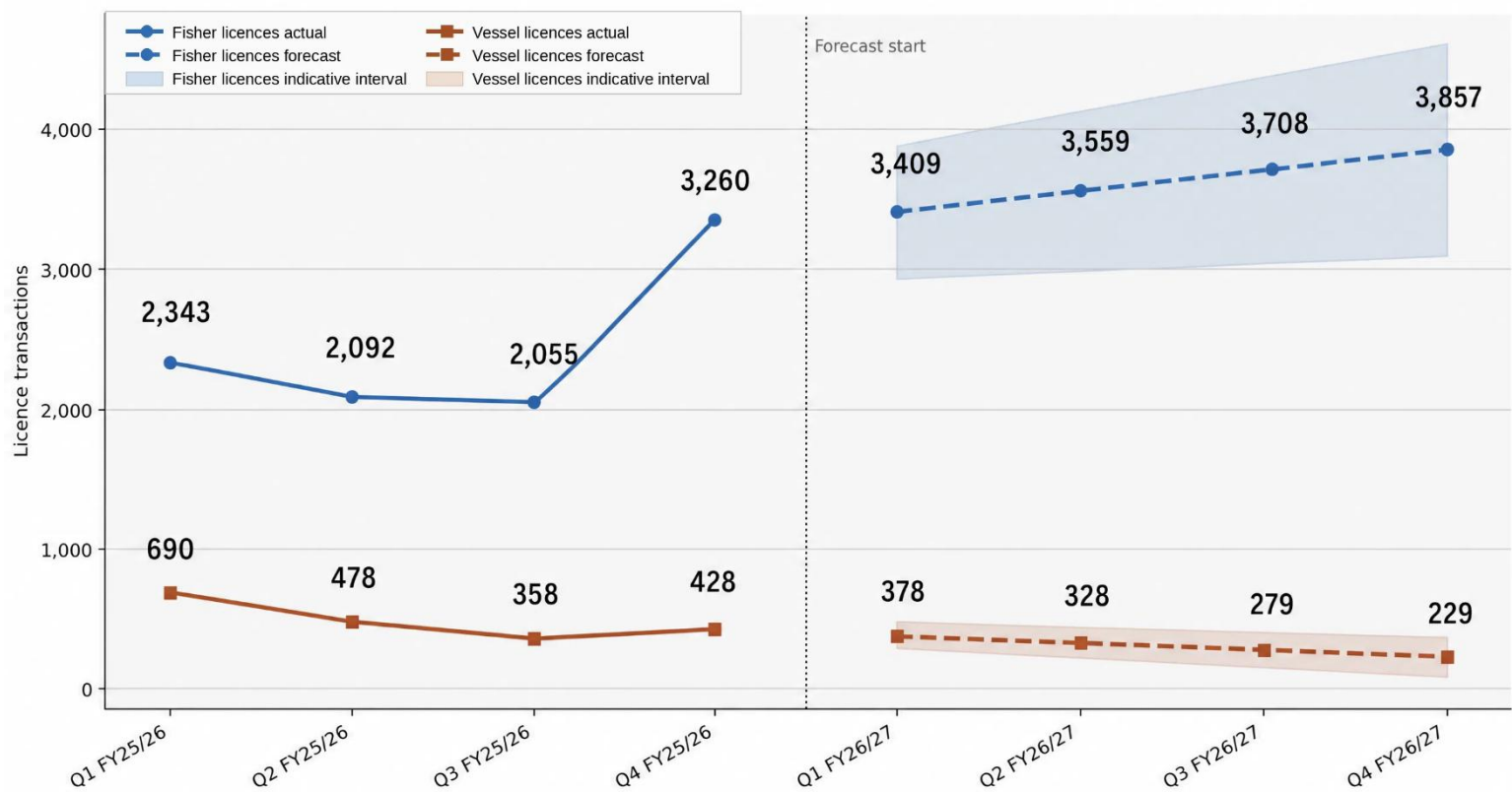


Photo 19. Fishers from the fishing community of Hunts Bay, who participated in the post-harvest training programme.





Figure 24: Quarterly licensing outlook based on FY 2025/26 quarterly licensing performance.



Marine production (MT)

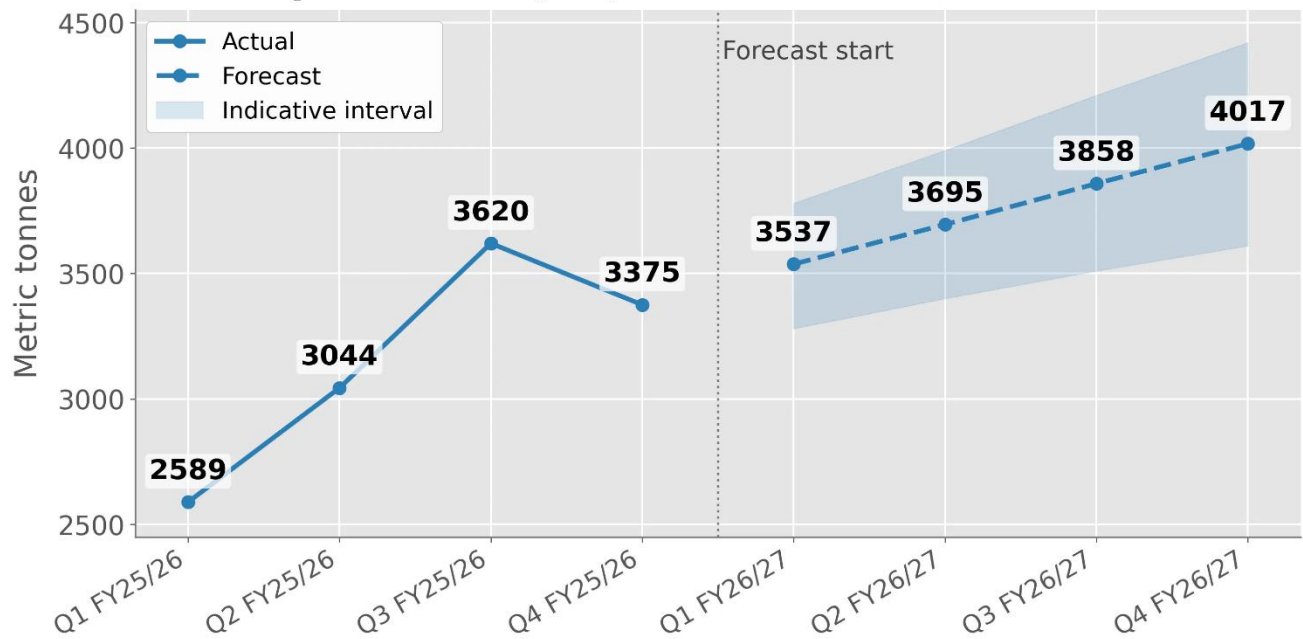


Figure 25: Marine production outlook based on FY 2025/26 quarterly production performance.



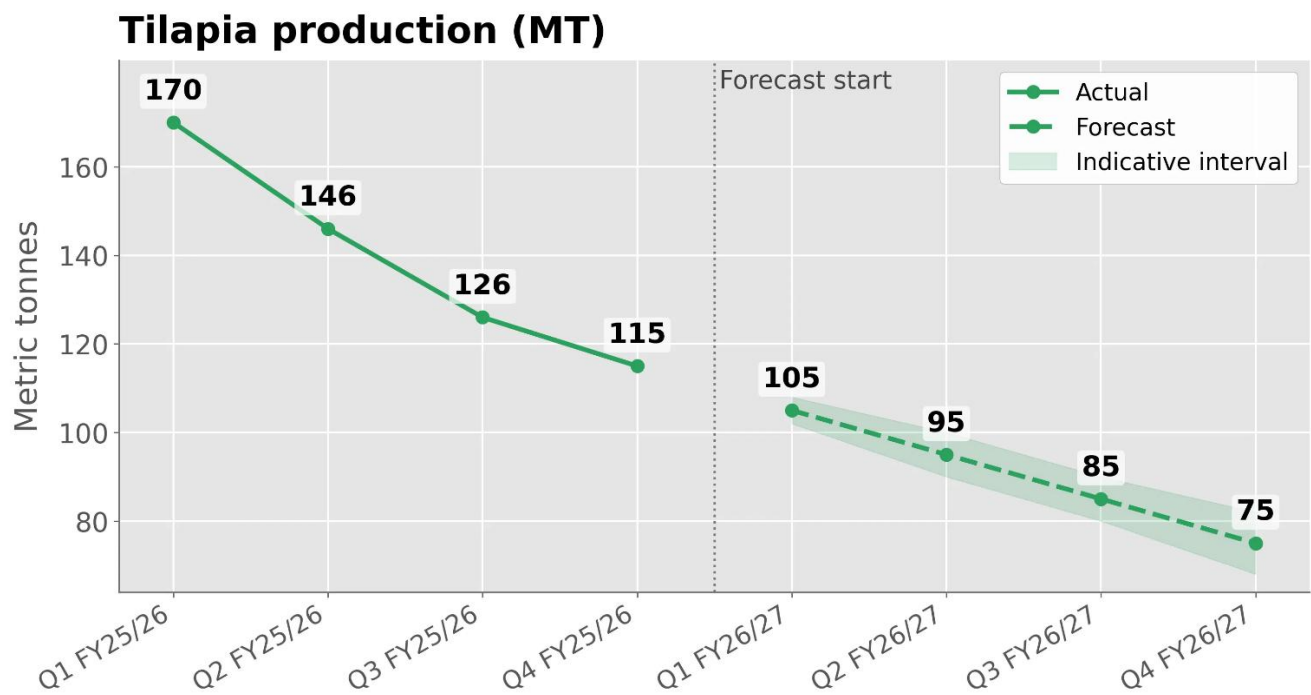


Figure 26: Aquaculture production outlook based on FY 2025/26 quarterly production performance.

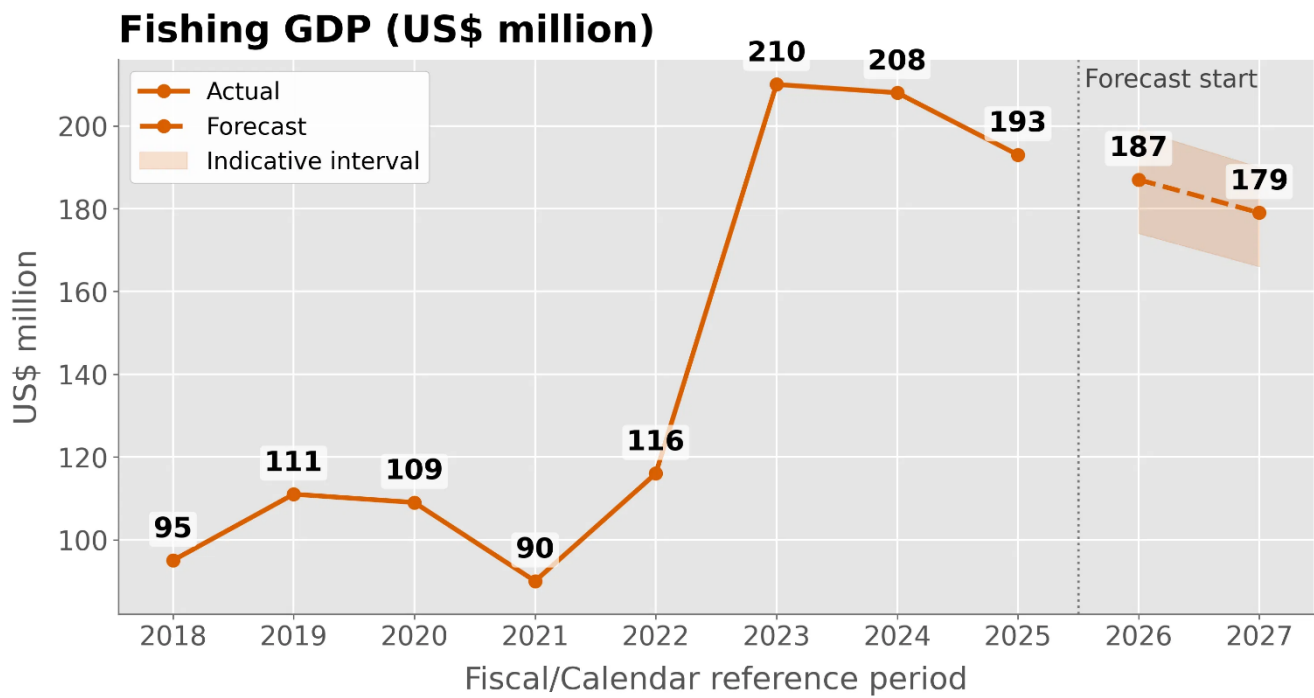


Figure 27: Fishery sector contribution to GDP outlook based on 2025 performance.





National Fisheries Authority

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