

National Fisheries Authority

JAMAICA FISHERIES:

Quarterly Statistics Report

Volume 2: Issue 2

July – September 2023



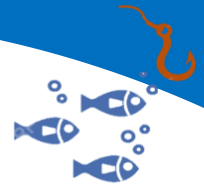
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National Fisheries Authority



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NATIONAL FISHERIES AUTHORITY, JAMAICA

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The contribution made by all staff members is appreciated. In particular, the Divisional Extension Officers and the team from the Statistics and Data Management Unit conducted the data collection, compilation, processing, and analysis accordingly.

The Statistics and Data Management Unit (SDMU) of the Fisheries Compliance, Licensing, and Statistics (FCLS) Division produced the report in collaboration with the NFA's Capture Fisheries and Aquaculture Divisions.

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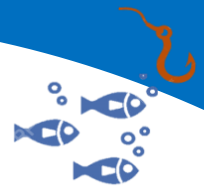
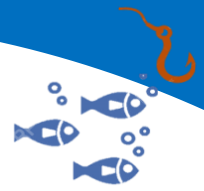


Table of Contents

| | |
|--|----|
| Part 1 – Overview | 6 |
| Q2 2023/24 PERFORMANCE AT A GLANCE | 7 |
| NATIONAL FISHERIES AUTHORITY | 8 |
| Role and Functions | 8 |
| Organisational Structure | 9 |
| FEATURE STORY | 10 |
| Part 2 Statistical Performance | 11 |
| FISHING VESSELS STATISTICS..... | 12 |
| FISHING VESSEL REGISTRATION | 12 |
| FISHER LICENCES STATISTICS..... | 14 |
| FISHER LICENCES | 14 |
| FISH PRODUCTION STATISTICS | 16 |
| MARINE PRODUCTION | 16 |
| AQUACULTURE PRODUCTION | 19 |
| COMPLIANCE STATISTICS | 22 |
| Part 3 – Fisheries Economic Performance | 24 |
| FISHERIES ECONOMIC PERFORMANCE..... | 25 |
| FISHERIES CONTRIBUTION TO GDP..... | 25 |
| FISHERS SOCIO-ECONOMIC STATISTICS | 26 |
| Part 4 – Conclusion | 28 |

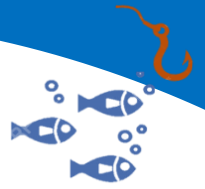


List of Tables

| | |
|--|----|
| Table 1: Total number of vessel licences issued by category, January – September 2023..... | 14 |
| Table 2: Estimated marine fish production (MT) and value (USD), January – September 2023. | 17 |
| Table 3: Marine fish production (MT) trend by fishery type, January – September 2023..... | 17 |
| Table 4: Estimated value (USD) for marine fish production (MT) by fishery type, January – September 2023. | 17 |
| Table 5: Fines for offences under the Fisheries Act – 2018, from 2019 to September 2023..... | 22 |
| Table 6: Number of individual fisher licences issued and renewal % (Excluding temporary permits)..... | 23 |
| Table 7: GDP Contribution (USD \$' Million) by the fisheries sector to Agriculture and Jamaica's GDP. | 25 |
| Table 8 Average Fin-Fish price per pound per parish during the period July – September 2023 (lowest prices highlighted in green and highest in red for the most common species). | 26 |

List of Figures

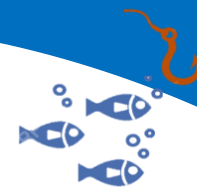
| | |
|---|----|
| Fig. 1 General Organisational Structure of the National Fisheries Authority..... | 9 |
| Fig. 2 Number of New Vessel Licences Issued, January to September 2023. | 12 |
| Fig. 3 Total Vessel Licence Issued (New and Renewed), January to September 2023. | 13 |
| Fig. 4: Vessel Licences Issued Q2 2022 vs Q2 2023 | 13 |
| Fig. 5: New Fisher Licences Issued, January to September 2023. | 15 |
| Fig. 6: Number of individual fisher licences issued by parish in Q2 2023/24..... | 15 |
| Fig. 7: Total licences issued per quarter, new and renewed..... | 15 |
| Fig. 8: Marine fish production January – September [2022 vs 2023] in MT. | 16 |
| Fig. 9: Marine fish production (pounds) by coastal region, January – September 2023. | 18 |
| Fig. 10: Coastal region contribution to Jamaica marine fish production (MT), January – September 2023..... | 18 |
| Fig. 11: Parishes and total aquaculture fisher farmers, as of September 2023. | 19 |
| Fig. 12: Jamaica aquaculture production (MT) from 2012 – 2023 with the YoY difference between subsequent years..... | 20 |
| Fig. 13: Quarterly performance of Jamaica's aquaculture production (MT) 2022 vs 2023. | 21 |
| Fig. 14: Percentage of Aquaculture production per parish, 2023. | 21 |
| Fig. 15: Total number of compliance site visits conducted in each parish within Q2 FY-2023/24 [July – September]..... | 23 |
| Fig. 16: The percentage contribution of fishing to the agriculture sector from 2018 to 2022 | 25 |
| Fig. 17: Age of fisher renewal applications from Jan.– September 2023..... | 26 |
| Fig. 18: Age of new fisher applications from Jan. – September 2023..... | 26 |
| Fig. 19: Sex of fishers receiving licences from January – September 2023..... | 27 |
| Fig. 20: 10-Incremental increase in registration of fishers by gender from 2002 to 2022 | 27 |



Part 1 – Overview

2nd Quarter 2023/24 PERFORMANCE AT A GLANCE
WHO WE ARE - National Fisheries Authority





Q2 JULY – SEPTEMBER 2023/24 PERFORMANCE AT A GLANCE

SUSTAINABLE FISHERIES



US \$45.3M Marine Fish Production estimated value for the period July – September 2023, based on estimated weight of 4,102.41 MT.

27% Production increase of seed stock (juvenile tilapia) available to fish farmers, when compared to the previous quarter [April – June].

21% Marine Fish Production recorded a 21% increase for the period July – September 2023, when compared to the previous quarter.

VESSEL MONITORING



Q2 2023/24 recorded a 93% increase in total vessel licences issued against the same quarter of 2022.

13% Q2 2023/24 recorded a 13% increase in new vessel licence issued, against Q1 2023/24.

SOCIO-ECONOMIC DATA



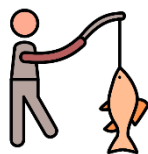
66 Increase in female licensed fishers for the period July – September 2023 [66] when compared to the previous quarter of 17.

47% 47% of the total number of fishers renewing their licence for the period July – September 2023 was in the age 36-55.

9% Increase in the 36 - 55 age group for new applicants for the period July – September 2023 when compared to the previous quarter.

20% Decline in the 17 - 35 age group for the period April – June 2023 when compared to the previous quarter.

FISHERS STATISTICS



2068 Number of fishing licences issued in Quarter 2 (Q2), July to September 2023



Q2 2023/24 [July – September] recorded a 2.5% increase in the number of fisher licences issued over the same quarter of the previous year 2022/23.

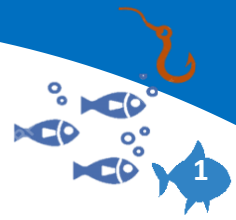
17% Increase in Tilapia Fish Farmers for the period April – September 2023.

FISHERIES ECONOMIC PERFORMANCE



US\$70.5M Contribution from Capture Fisheries Production

US\$2.8M Contribution from Aquaculture Production



NATIONAL FISHERIES AUTHORITY

The National Fisheries Authority (NFA) was established as a body corporate, under Section 5(1) of The Fisheries Act, 2018, with the mandate being that the Authority will be responsible for the management and development of 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, authorizations and permits and allocation of fishing rights and quotas for all who intend to fish in Jamaica's waters. Before its establishment, the fisheries and aquaculture sectors were regulated by the Fisheries Division, which was established in 1949 and as a government division, fell within the portfolio with responsibility for Fisheries. Transitioning to a statutory body allows the NFA to regulate the fisheries and aquaculture sectors more independently within the structure of a strengthened legislative framework, enabled by the new Act.

VISION:

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

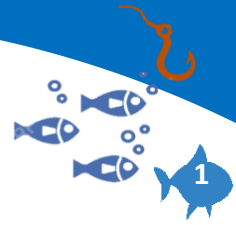
MISSION:

To facilitate the sustainable development of the Jamaican fisheries sector, including aquaculture, through effective and efficient management, regulation, administration, and participatory governance for the benefit of all Jamaicans.

Role and Functions

The NFA is the Jamaican Government agency responsible for the provision of regulatory and other services to ensure efficient and sustainable management of Jamaica's fisheries waters on behalf of the Jamaican community. The challenge in delivering these services is to find the right balance between competitive and profitable aquaculture production and keeping the impacts of fishing on Jamaica's marine ecosystems within sustainable and acceptable risk levels.

Our fisheries management practices aim to maintain the environmental sustainability of commercial fisheries for Jamaicans both now and in the future. These practices have regard to the impact of fishing on non-target species and the long-term health of the broader marine environment.



The National Fisheries Authority is also responsible for international fisheries matters, including preventing illegal foreign fishing (Illegal, Unreported and Unregulated (IUU) fishing) in Jamaica’s fisheries waters. The Authority participates in the management, monitoring, control, and surveillance activities as well as developing capacity-building activities and providing advice and training to the Jamaican Fishers.

Organizational Structure

The NFA, with a staff complement of 290 persons, is governed by a Board, which advises the Minister with responsibility for fisheries, while the Chief Executive Officer is responsible for carrying out the functions and managing the operations of the Authority.

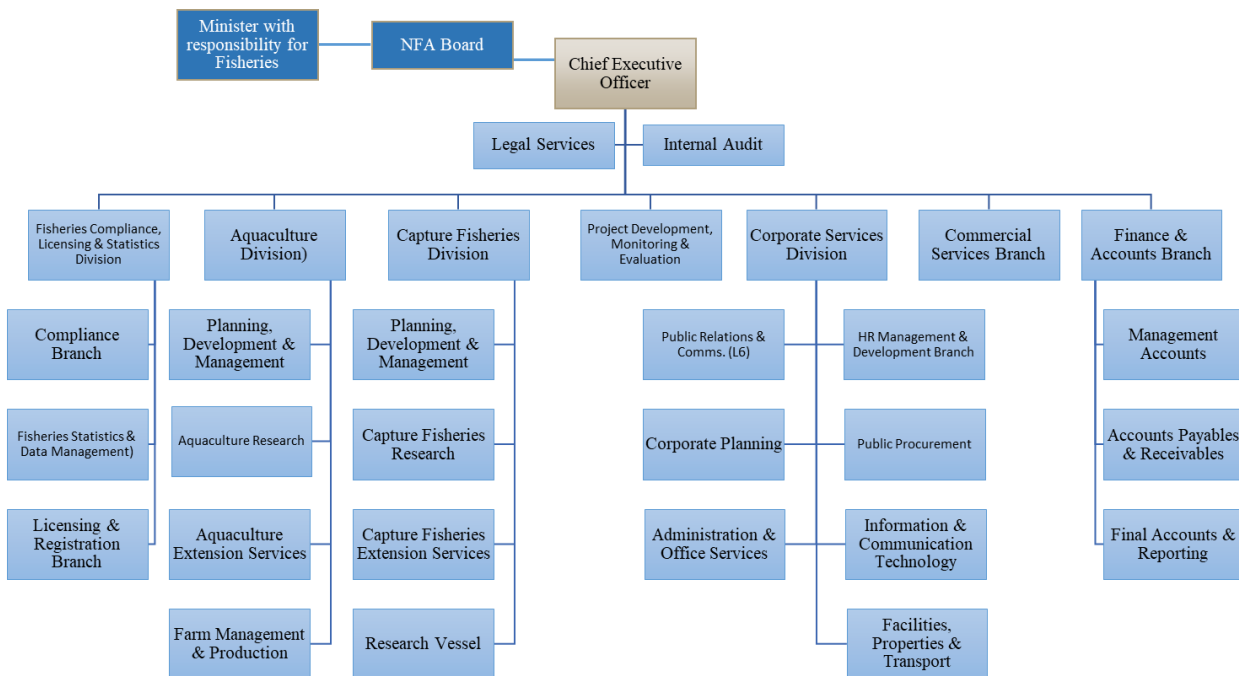
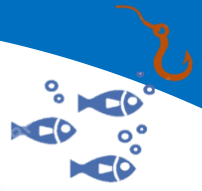


Fig. 1 General Organisational Structure of the National Fisheries Authority

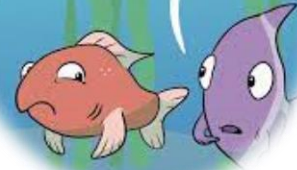


National Fisheries Authority Corporate Head Office



SPECIAL FEATURE

Well, you know what they say...



Promoting Community-Based Climate Resilience in the Fisheries Sector

“
USE THE RIGHT SIZE NET
SO DI BABY DEM
WON'T GET KETCH
”

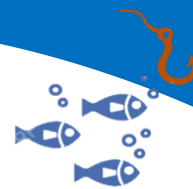


“
PLASTIC AND FISH NUH 'GREE
CLEAN UP AND KEEP IT FROM GOING OUTA SEA
”



“
STOP USE DYNAMITE
DIS IS NOT A WAR FIGHT
”





Part 2 Statistical Performance

Fishing Vessel Licences

Fisher Licences

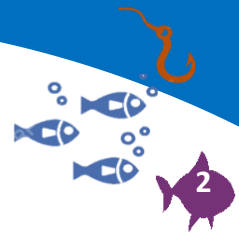
Fish Production Data

(A) Marine Production

(B) Aquaculture Production

Compliance Statistics





FISHING VESSELS STATISTICS

FISHING VESSEL REGISTRATION

The National Fisheries Authority continues its drive towards increasing fishing vessel registration compliance through several initiatives, such as hosting in-field licensing sessions and carrying out enforcement activities.

For the period July – September 2023 (2nd Quarter 2023/24), 467 vessel licences were issued. New applicants accounted for 122 of the total licences issued (see Figure 2), representing an increase over the number of new applicants in the same quarter in the last year (42).

STATISTICAL PERFORMANCE

NEW VESSEL LICENSE ISSUED

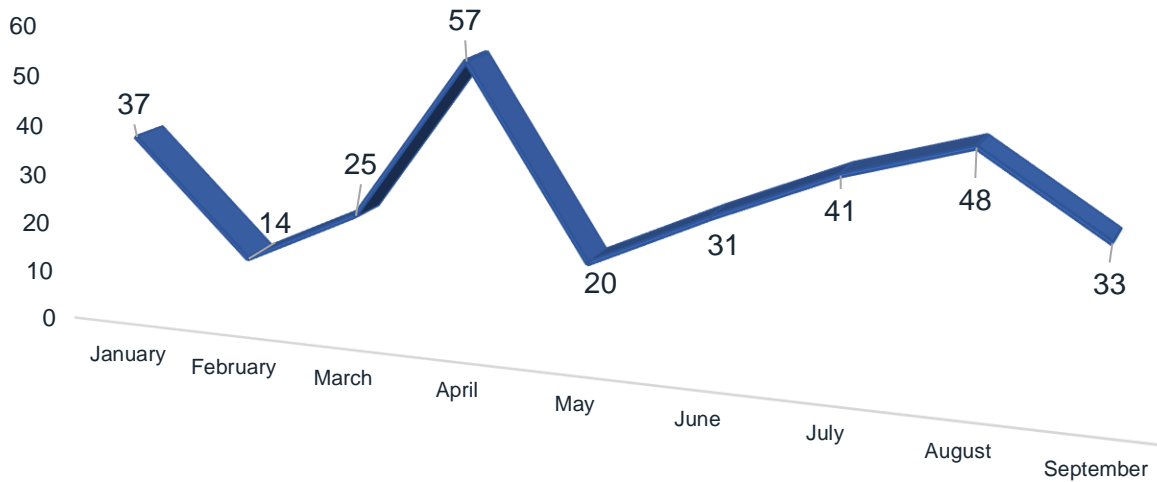


Fig. 2 Number of New Vessel Licences Issued, January to September 2023.

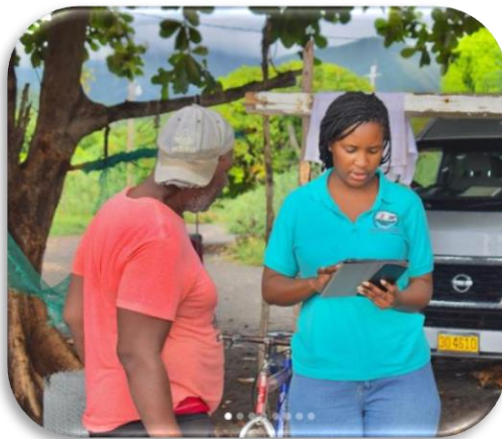
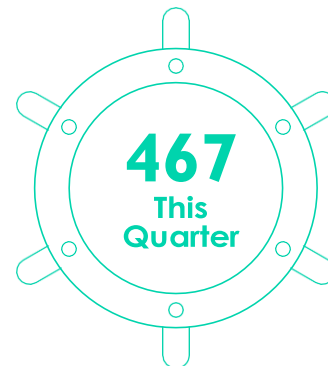


Photo: NFA Data Collection Officer Randeem Harrison interviewing a Fisher



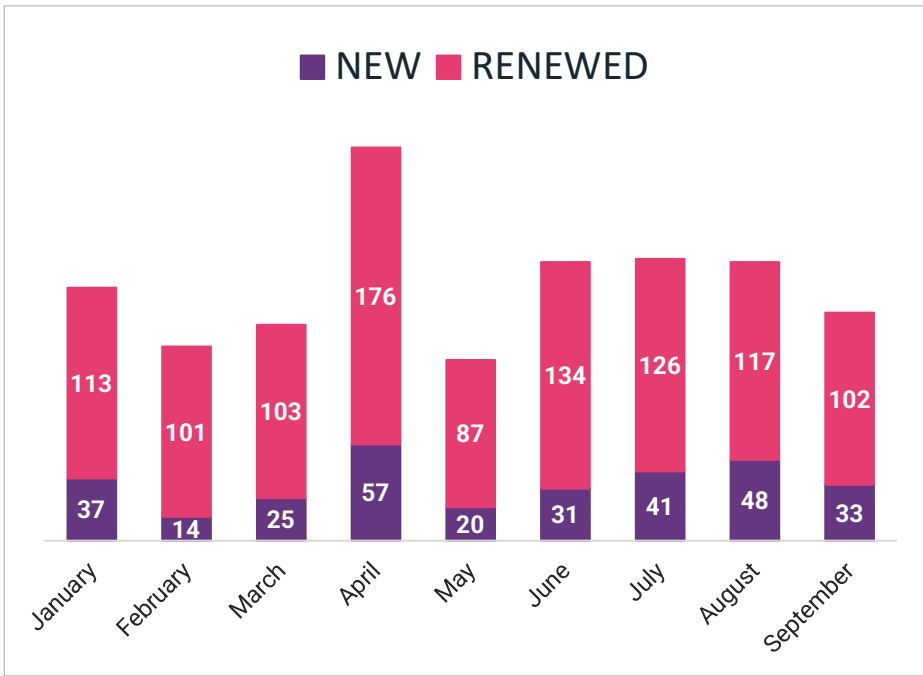


Fig. 3 Total Vessel Licence Issued (New and Renewed), January to September 2023.



NFA's CEO Dr Gavin Bellamy welcomed Prime Minister of Jamaica The Most Honourable Andrew Holness ON, PC, inside the NFA's Booth at the 69th Denbigh Agricultural Show.

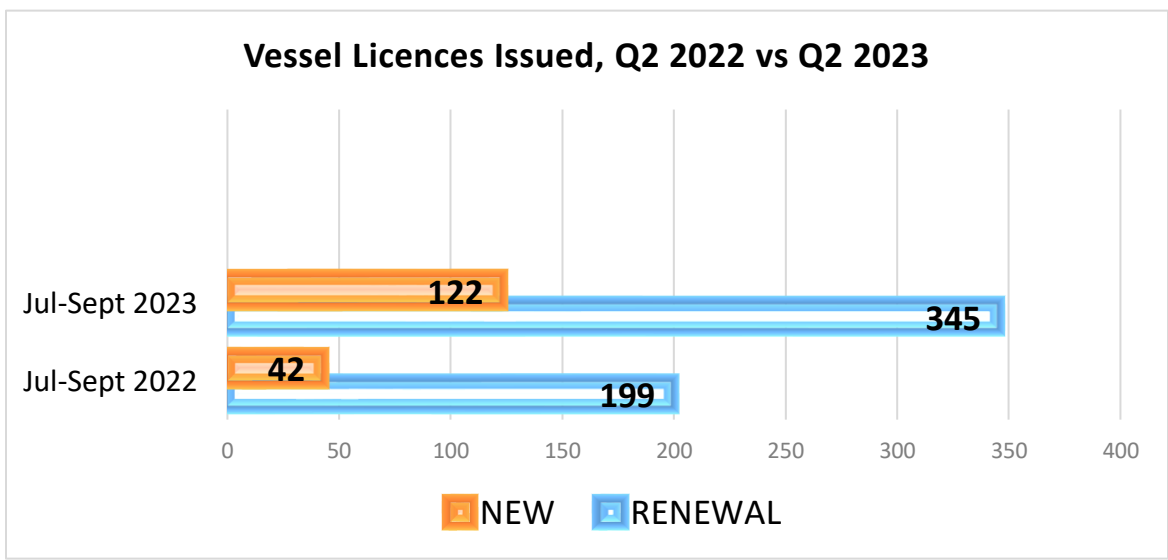


Fig. 4: Vessel Licences Issued Q2 2022 vs Q2 2023

With 467 vessel licences issued in July – September, the overall monthly average decreased from 168 in the previous quarter to 155 in the 2nd Quarter. The data in Figure 3 show the number of licences issued per month since the start of the year, with April still holding the record for the highest number of vessel licences being issued.

In comparison to the same period last year, Q2 2023 recorded a 93% increase in overall vessel licences issued, 190% increase in new applications and 73% increase in renewal applications. Artisanal fishing continues to account for the major category of total vessel licences issued, accounting for 87% of the total vessel licences issued from January to June 2023 (Table 1).

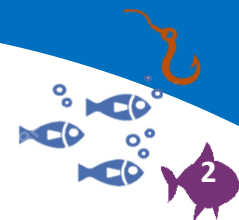


Photo: National Fisheries Authority's CEO Dr Gavin Bellamy and Principal Director, of Capture Fisheries Division Mr Stephen Smikle, engaging local fishers from Great Bay, St. Elizabeth.

| NUMBER OF BOAT LICENSES ISSUED BY CATEGORY FROM APRIL TO SEPT 2023. | | | | | | | | | | | |
|---|------------|------------|------------|------------|------------|------------|------------|------------|------------|-------------|-------------|
| CATEGORY | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | TOTAL | % |
| ARTISANAL | 139 | 95 | 105 | 196 | 96 | 153 | 157 | 142 | 115 | 1198 | 88% |
| INDUSTRIAL | 4 | - | 3 | 4 | 4 | 3 | 0 | 6 | 5 | 29 | 2% |
| RECREATIONAL | 5 | 11 | 3 | 10 | 3 | 6 | 10 | 13 | 9 | 70 | 5% |
| CAY | 35 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 35 | 3% |
| SPORTS CHARTER | 2 | 5 | - | 9 | 0 | 0 | 0 | 4 | 1 | 21 | 2% |
| TEMP VESSEL | - | 1 | - | 0 | 0 | 3 | 0 | 0 | 0 | 4 | 0% |
| CERTIFICATE | | | | | | | | | | 4 | 0% |
| CONCH | 0 | 0 | 0 | 7 | 0 | 0 | 0 | 0 | 0 | 7 | 1% |
| TOTAL | 185 | 112 | 111 | 226 | 103 | 165 | 167 | 165 | 130 | 1364 | 100% |

Table 1: Total number of vessel licences issued by category, January – September 2023.

FISHER LICENCES STATISTICS

FISHER LICENCES



1,619 fisher licences were issued in Q2, with the highest number recorded in August (Figure 5). The 1,619 licences issued in Q2 2023/24 [July – August] represent a 28% decline over the previous quarter Q1 2023/24 and a marginal increase of 2.5% over Q2 in the previous year. There was a 10% decline in new applications and a 41% decline in renewal applications, in comparison to the previous quarter.

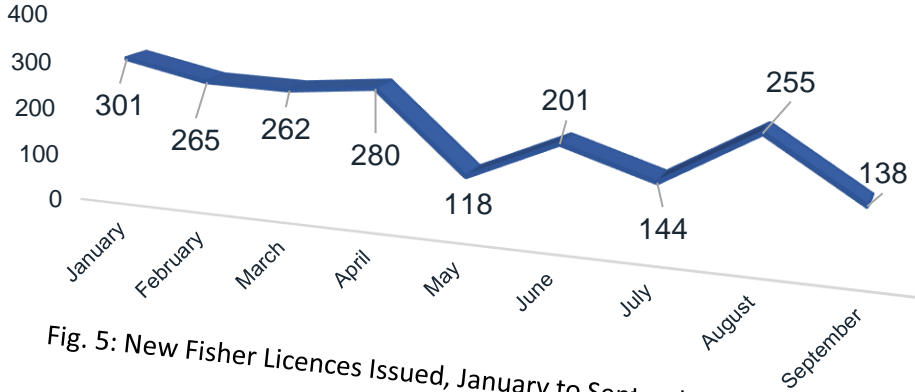
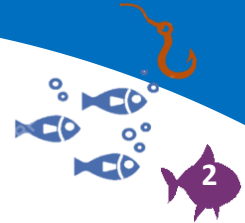


Fig. 5: New Fisher Licences Issued, January to September 2023.

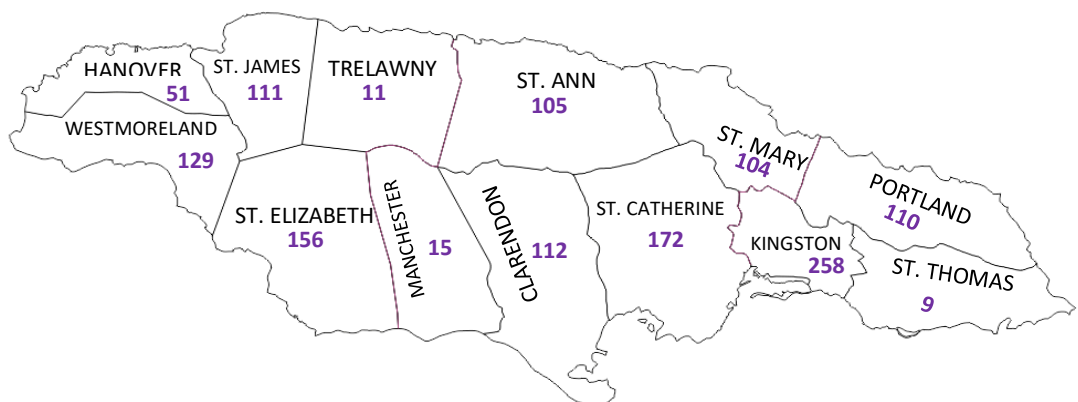
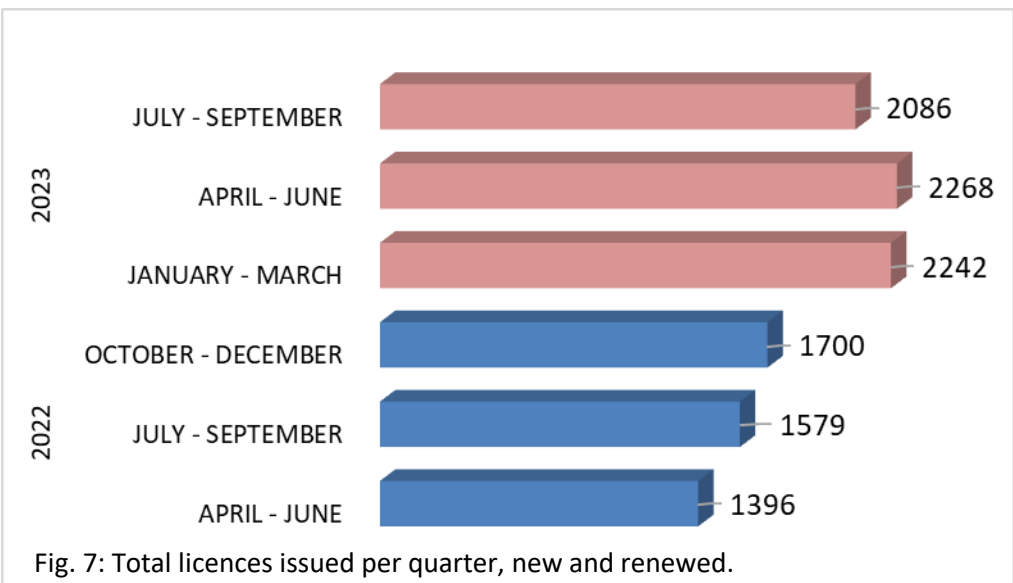


Fig. 6: Number of individual fisher licences issued by parish in Q2 2023/24.

Figure 7 highlights the total number of individual and vessel licences issued from the previous financial to Q2 of the current financial year. Based on the figures presented, there has been an increase in the number of licences processed since the start of the calendar year.



6578
Licences issued since 2023.

Fig. 7: Total licences issued per quarter, new and renewed.



FISH PRODUCTION STATISTICS

MARINE PRODUCTION

The data collection system for the artisanal fisheries is predicated on landings at individual beaches, with the average number of days fished per month being 20 days. The fishing beaches are sampled in accordance with an annual sampling plan, and based on the data collected, estimates of production are computed. The artisanal fish production is diverse and includes finfish species (such as snappers, parrotfish, jacks, grunts), lobster, and conch.

Data collection during the period under review recorded over 350 species of fish being caught, representing a 15% increase compared to 300 species identified in the previous quarter. The Sardines (*Sardinella* spp.), Black Jacks (*Caranx lugubris*), and Herring (*Opisthonema oglinum*) continue to account for most of the catch. The popular food fish Snapper showed high species diversity with over eleven different species being identified, including Dog, Glasseye, Grey, Lane, Mutton, Red, Silk, Vermillion and Yellowtail.

For July – September 2023, marine finfish production was 4,102.41 MT (Table 2, Fig. 8), representing a 21% increase compared to the previous quarter's value of 3,363.53 MT; Additionally, the sector recorded a 44% increase YoY over the same quarter (2,833.5MT) of 2022. The production figures is an estimate base on the sampling plan. The marine production for 2023 was revised from previous quarters results. Production of 4,102.41 MT yields an approximate value of USD 45.3 Mil or ~ JMD\$ 7 billion (Table 2). This represents an approximate 21% increase in USD earnings in comparison to the previous quarter's earnings value.

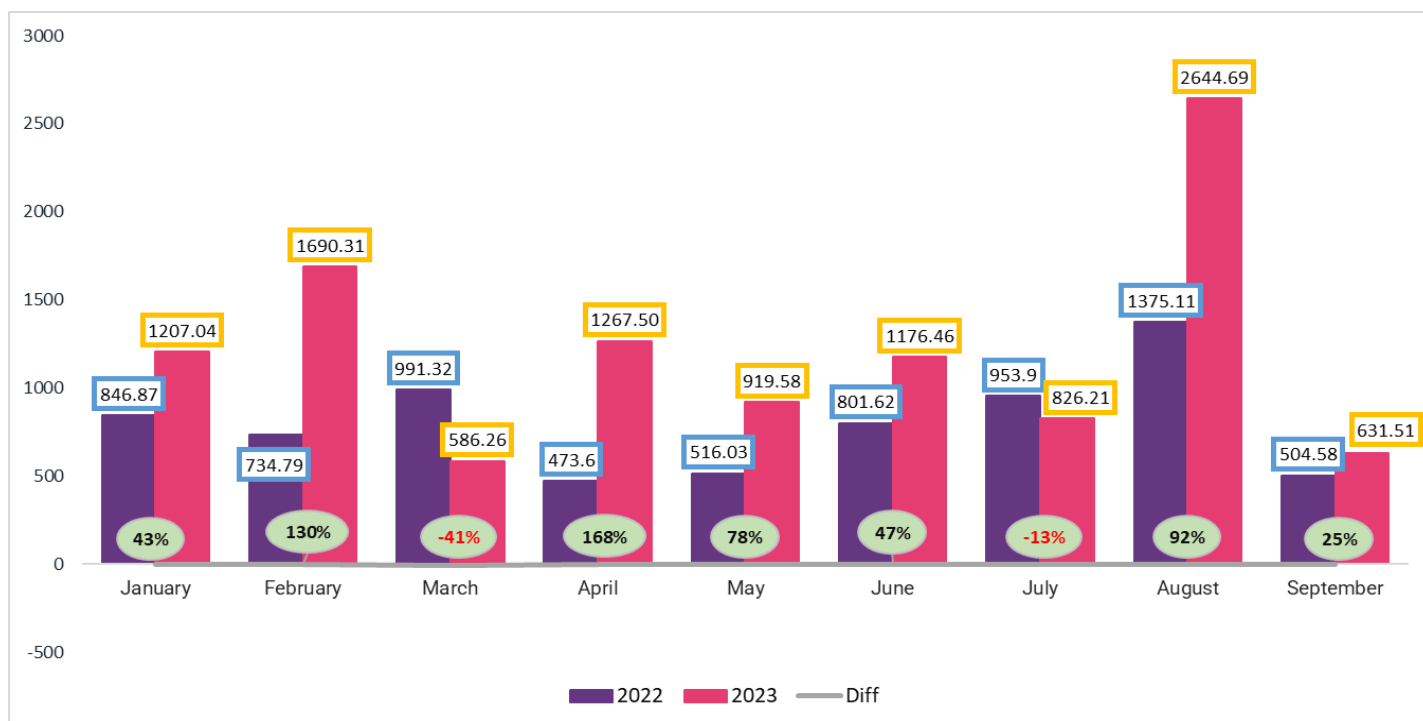


Fig. 8: Marine fish production January – September [2022 vs 2023] in MT

*Jan – June 2023 Production figures were revised.

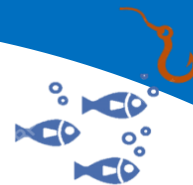


Table 2: Estimated marine fish production (MT) and value (USD) for the artisanal fishery, January – September

| 2023 | January | 1,207.04 | 3,483.60 | 4th Quarter FY 22/23 | 2,062,919,810.46 | \$ 5,953,744,591.16 | 4th Quarter 2022 | \$ 13,334,969.71 | \$ 38,485,744.03 | 4th Quarter FY 22/23 |
|-----------|----------|----------|----------------------|----------------------|------------------|---------------------|----------------------|------------------|------------------|----------------------|
| | February | 1,690.31 | | | | | 2,888,865,852.57 | | | |
| March | 586.26 | | | 1,001,958,928.13 | | | \$ 6,476,786.88 | | | |
| April | 1,267.50 | | 3,363.53 | 1ST Quarter FY 23/24 | 2,166,251,731.11 | | 1ST Quarter FY 23/24 | \$ 14,002,920.07 | | 1ST Quarter FY 23/24 |
| May | 919.58 | | | | 1,571,629,423.03 | | | \$ 10,159,207.67 | | |
| June | 1,176.46 | | | 2,010,658,217.31 | | \$ 5,748,539,371.45 | \$ 12,997,144.28 | | \$ 37,159,272.02 | |
| July | 826.21 | | 2nd Quarter FY 23/24 | 1,412,058,336.42 | | | 2nd Quarter FY 23/24 | \$ 9,127,720.35 | | 2nd Quarter FY 23/24 |
| August | 2,644.69 | | | 4,519,983,176.58 | | | \$ 29,217,732.29 | | | |
| September | 631.51 | | 4,102.41 | 1,079,292,031.71 | | \$ 7,011,333,544.71 | \$ 6,976,677.66 | | \$ 45,322,130.30 | |

Table 3: Marine fish production (MT) trend by fishery type, January – September 2023.

| Fishery | Production (MT) | | | | | | | | | Total | % Composition |
|--------------------------------|-----------------|----------------|---------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|---------------|
| | 2023 | | | | | | | | | | |
| | January | February | March | April | May | June | July | August | September | | |
| Atrisanal finfish | 1,207.04 | 1,690.31 | 586.26 | 575.10 | 646.86 | 596.88 | 826.21 | 2,644.69 | 631.51 | 9,404.85 | 96.70 |
| Sea Cucumber | 0 | 0 | | | | | | | | 0.00 | 0.00 |
| Industrial Conch | | | 0 | 9.43 | 41.31 | 103.81 | 8.98 | | | 163.53 | 1.68 |
| Industrial Spiny Lobster* | 37.18 | 28.03 | 44.98 | | | | 0.00 | 16.04 | 31.28 | 157.51 | 1.62 |
| Total Marine Production | 1244.22 | 1718.34 | 631.24 | 584.53 | 688.17 | 700.69 | 835.19 | 2660.73 | 662.79 | 9,725.89 | 100 |

* Reported weight for whole, tail and head meat

Close Season

Table 4: Estimated value (USD) for marine fish production (MT) by fishery type, January – September 2023.

| Fishery | Estimated Value (USD) | | | | | | | | | Total | % Contribution |
|--------------------------------|-----------------------|----------------------|---------------------|---------------------|----------------------|----------------------|---------------------|----------------------|---------------------|----------------------|----------------|
| | January | February | March | April | May | June | July | August | September | | |
| Atrisanal finfish | \$13,334,970 | \$ 18,673,987 | \$ 6,476,787 | \$14,002,920 | \$ 10,159,208 | \$ 12,997,144 | \$ 9,127,720 | \$ 29,217,732 | \$ 6,976,678 | \$120,967,146 | 91.45 |
| Industrial Conch | | | \$ - | \$ 16,954 | \$ 700,351 | \$ 1,759,948 | \$ 152,243 | | | \$ 2,629,495 | 1.99 |
| Industrial Spiny Lobster* | \$ 2,048,376 | \$ 1,544,271 | \$ 2,478,106 | | | | \$ - | \$ 883,981 | \$ 1,723,665 | \$ 8,678,400 | 6.56 |
| Total Marine Production | \$15,383,346 | \$ 20,218,258 | \$ 8,954,893 | \$14,019,874 | \$ 10,859,559 | \$ 14,757,092 | \$ 9,279,963 | \$ 30,101,714 | \$ 8,700,343 | \$132,275,041 | 100.00 |



National Fisheries Authority's Principal Director Dr Zahra Oliphant hands out a life jacket to a local fisher.



National Fisheries Authority's Senior Director of Aquaculture Research Mr Dehaan Brown explains aspects of aquaculture best practices at a recent stakeholder session.

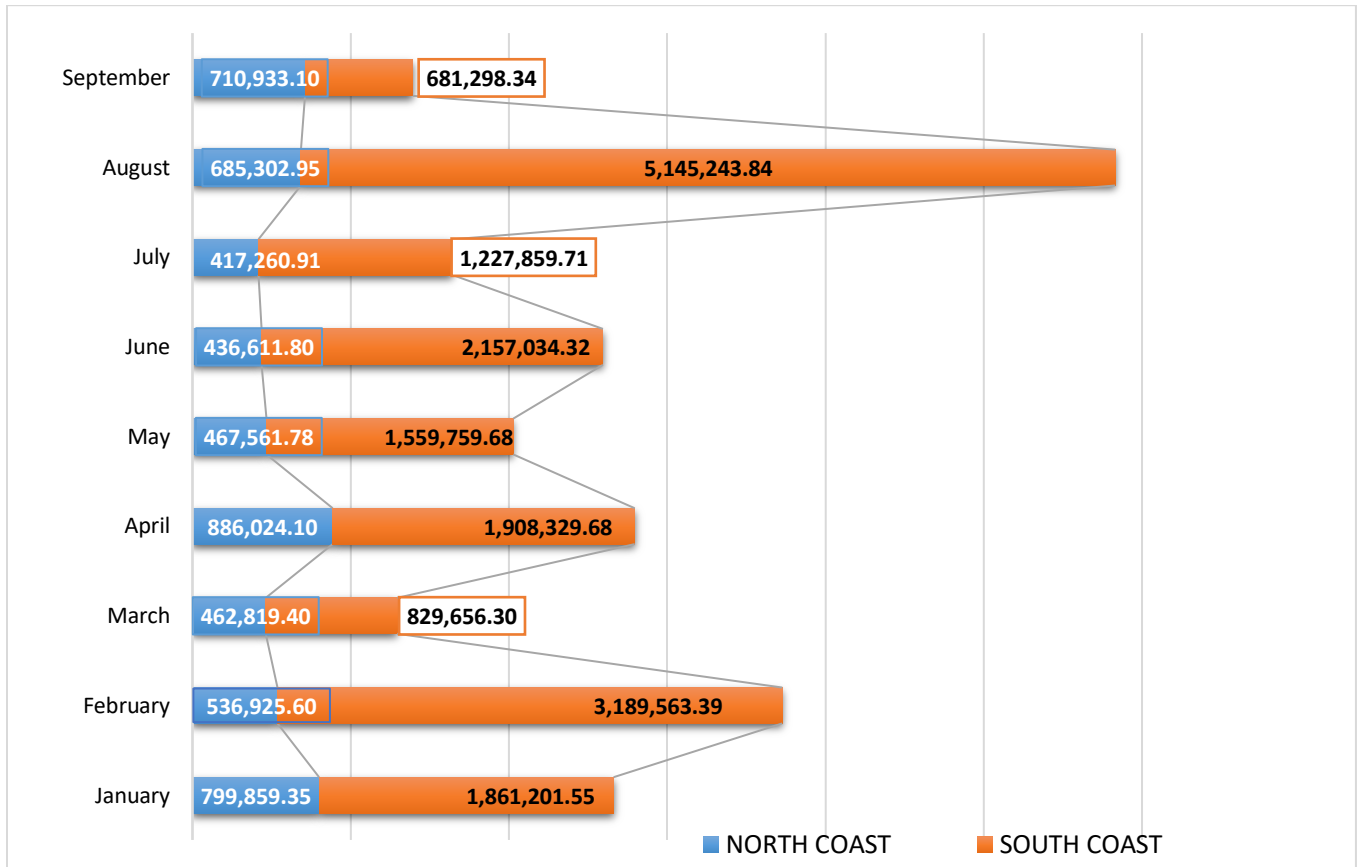
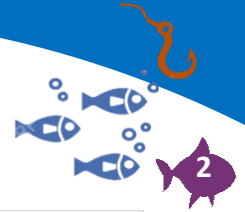


Fig. 9: Marine fish production (pounds) by coastal region, January – September 2023.

96% of Jamaica's total marine production was attributed to artisanal fishing for the 9-month performance [January to September 2023]. The month of August recorded the highest production levels, accounting for 24% of the 9-month total of 10,949.54 MT. Artisanal marine fish production on the southern belt accounted for 75% of Jamaica's total marine fish production (Fig.10).

The Authority ties this performance to the fishing which takes place at the Cays, most of which are located on the southern coast of the island. The Pedro Bank is a unique area, almost three-quarters the size of mainland Jamaica. Most of the bank is underwater and it is composed of sand, coral reefs, deep reefs, seagrass beds, and three coral cays known as the Pedro Cays. This environment supports marine life production and the reef, offshore, and deep slope fisheries yielded the greatest productivity during this period.

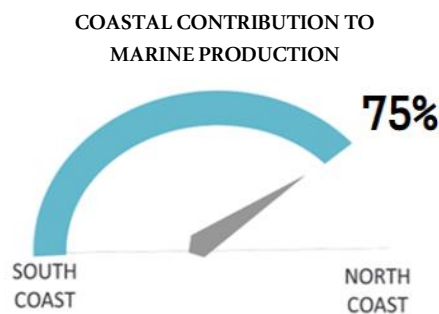
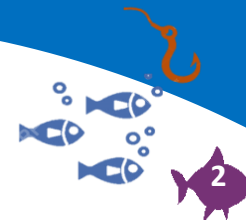


Fig. 10: Coastal region contribution to Jamaica marine fish production (MT), January – September 2023.



Jamaica’s marine fish production sector continues to be plagued by several factors, as reported to the Authority’s Data Collection and Fisheries Extension Officers. During the reporting period, the factors reported were similar to those highlighted in previous publications; poor weather conditions, climate change (elevated sea temperatures), fish migration, influx of *Sargassum* particularly on the south coast, etc. Fish migration, however, also presents some benefits as fish migration patterns, takes them through our waters from other areas. Likewise, *Sargassum* blooms are also beneficial to fish as a food source, for nursing and providing shelter.

AQUACULTURE PRODUCTION

During the period July – September 2023, the aquaculture sector harvested 217.43 MT of Tilapia. The first two quarters [220.9 Q1 and 217.4 Q2] represent 40% [438.3 MT] of the total aquaculture annual target of 1,100 MT. This is valued at J\$441.81M or US\$2.83.

Currently, there are 719.40 acres of tilapia ponds in production. There was a 17% increase in fish farmers engaged in tilapia production during Q2, from 117 to 137. 80% [110] of the 137 tilapia fish farmers are male and 20% [27] are females. Additionally, of the 137 fish farmers involved in tilapia production 69% [95] are registered and in receipt of fish farmer identification cards, with the remaining 31% [41] currently being processed for issuance.

The southern-central plains of St. Catherine and Clarendon continue to be the prevalent fish farming areas accounting for 83% [93] of the total 111 registered fish farms.



Aquaculture Research Officer Roxann Taylor conducts water sampling activities.

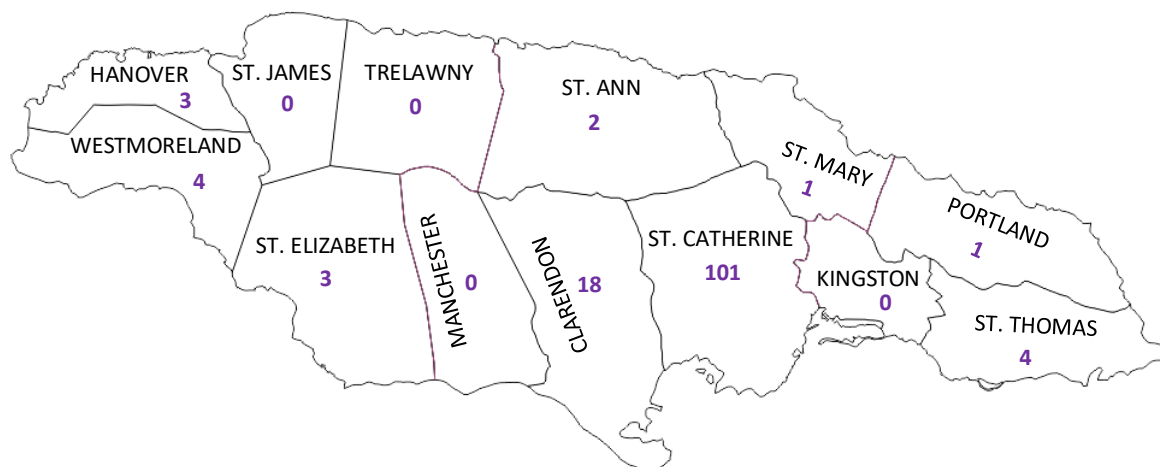
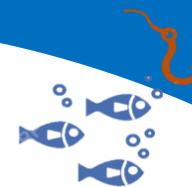
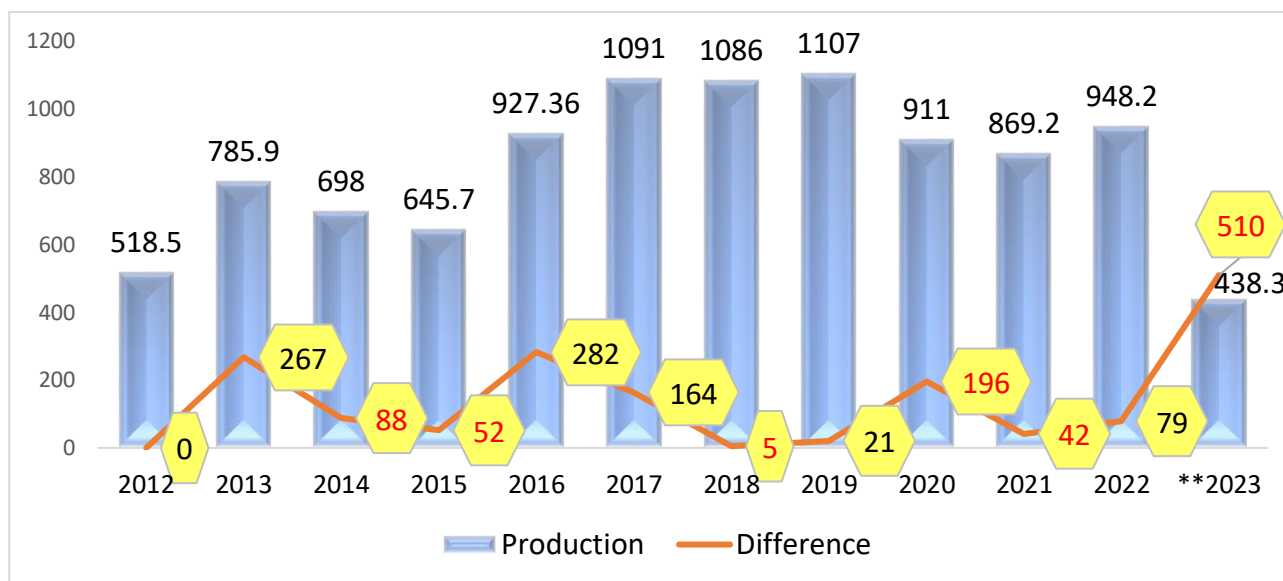


Fig. 11: Parishes and total aquaculture fisher farmers, as of September 2023.



The Aquaculture Division continues its drive towards providing training and consultation to registered and prospective farmers within the sector. During the period July – September 2023, 17 persons were trained in tilapia production in the farming community of Lloyds Pen, St. Catherine. They were trained in pond management, water quality management, tilapia nutrition, and feed management.



** represents only 2 quarters, April – September 2023.

Fig. 12: Jamaica aquaculture production (MT) from 2012 – 2023 with the YoY difference between subsequent years

The NFA’s Aquaculture Division continued to support ornamental fishing; as of September 2023, the number of registered ornamental fish farmers stood at 63. Most ornamental fish farmers are in Kingston and St. Catherine. The species of fish that are commonly cultured include koi, goldfish, cichlids, paradise, Siamese fighters, gourami and angels.

The ornamental industry consists of growers, breeders, importers, and retailers. Ornamental fish across Jamaica are presently grown and cultured in ponds, tanks, vats, aquaria, and other items suitable for holding water for the growing of fish.

Outside of the NFA’s mariculture facility at Bowden, there are also three active oyster groups in Jamaica: **Western Supreme Oysters and More** in Westmoreland; **Kee Farms** in Portland; and **Green Island Fisher Folks** in Hanover. A total of 36 persons are engaged in oyster production and are currently culturing *Crassostrea rhizosphere* or cup oysters.



Minister of Planning, Agriculture, Housing, and Infrastructure of the Cayman Islands, Hon. Jay Ebanks, stopped by NFA’s Oyster Bar at the Denbigh Agricultural Show. He is in the presence of State Minister in the MOAFM, Hon. Frank Witter.

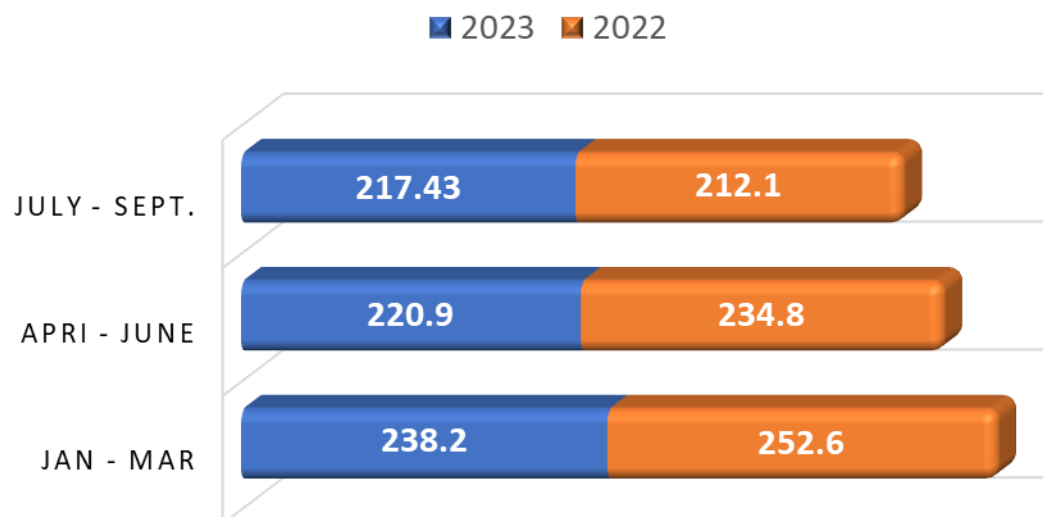


Fig. 13: Quarterly performance of Jamaica's aquaculture production (MT) 2022 vs 2023.

The Aquaculture Division of the NFA continues to produce and supply seed stock to fish farmers to stock their ponds. The Division has set a target for 2023/24 of 1.7M tilapia seed stock; as of September 2023, the division is at 46% of its annual target, with Q1 recording 343,878 and Q2 435,569. Q2 recorded a 27% increase over the previous quarter.

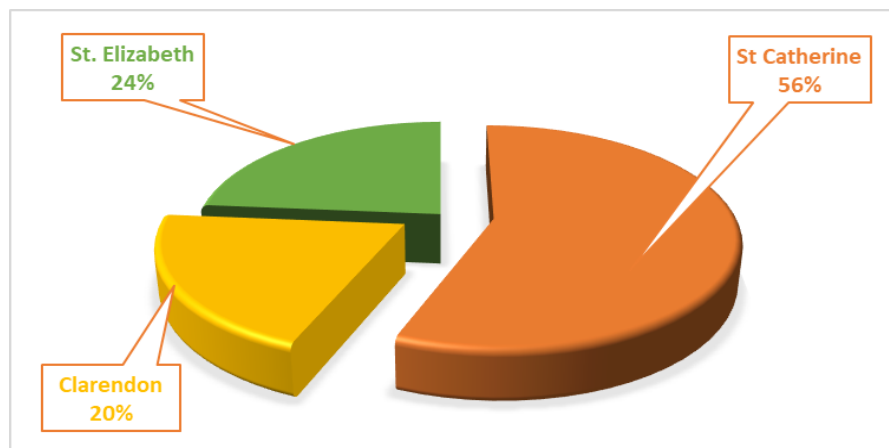


Fig. 14: Percentage of Aquaculture production per parish, 2023.

There has been an increase in marketing campaigns targeting tilapia consumption with the intention being to increase the uptake of farmed fish by consumers. Fish farmers continue to rely on vendors to buy and distribute their products from farm-gate to the markets. With plans to increase data collection within the sector, the Authority will be providing more economic data to ascertain the commercial value of tilapia sold to restaurants, hotels, supermarkets, etc.



Children look on with curiosity at a Tilapia Fish Tank, at the NFA's Aquaculture Division Display Booth.



Aquaculture Extension Officers Leanne Morris and Kerrone Fairclough representing the Authority at a public event.

The predominant size sold in the market is 227–340 kg. The price for fry for the stocking of fishponds remains at JMD\$4.00 each and the average farmgate price for Q2 (July to September) was \$450 per pound and this is marginally higher than the average price (\$430) recorded in 2022.

COMPLIANCE STATISTICS

The Compliance Branch conducted more than 900 site visits to fishing beaches, marinas, restaurants, tournaments, seafood stores, rivers, fish farms, supermarkets, and wholesales in Q2. The Authority continues its specialized joint inspections with the Jamaica Constabulary Force and the Jamaica Defence Force, reporting over 61 joint inspections. The continued monitoring, control, and surveillance resulted in a 64% increase in arrests for the period under review compared to last quarter's performance. There was also a 27% increase in the number of court appearances during the July to September 2023 period.

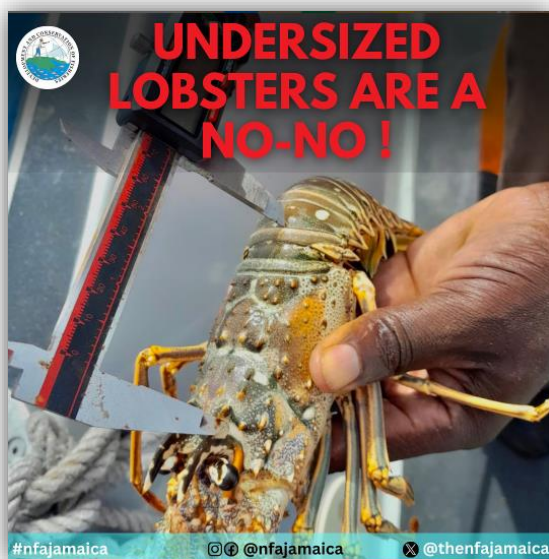


Table 5: Fines for offences under the Fisheries Act – 2018, from 2019 to September 2023.

| 2019 | 2020 | 2021 | 2022 | 2023** | TOTAL |
|-------------|-----------|-------------|-------------|-------------|-------------|
| \$2,642,000 | \$180,000 | \$1,145,000 | \$1,004,000 | \$2,826,700 | \$7,797,700 |

** January to September

Based on the data presented in Table 5, the Authority so far in 2023, has already surpassed the highest value for fines issued since 2019.

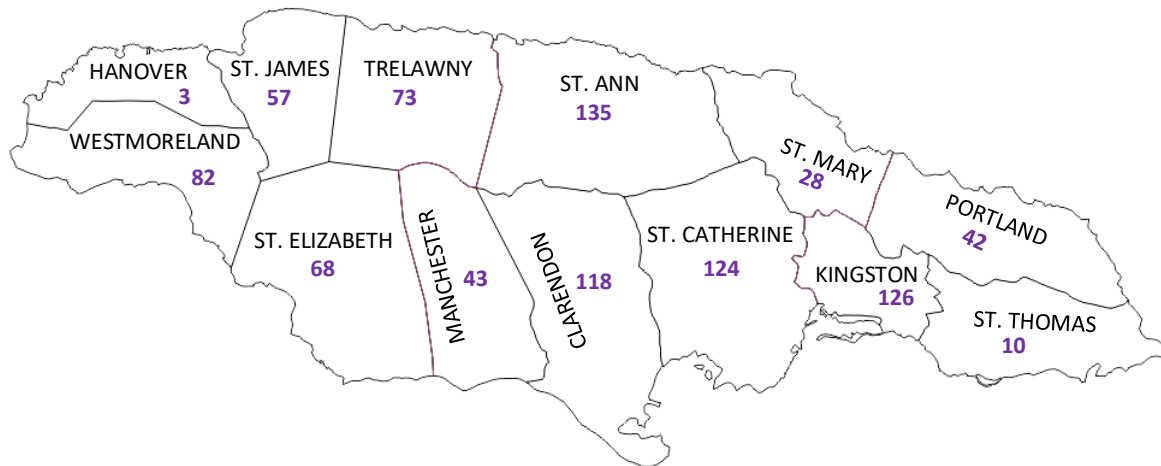
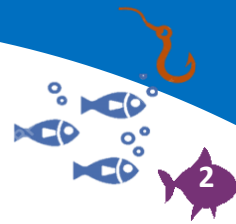


Fig. 15: Total number of compliance site visits conducted in each parish within Q2 FY-2023/24 [July – September].

The Fisheries Compliance Licensing and Statistics Division continues to monitor the incidence of individuals fishing without a licence. For Q2, of the individual fishing licence renewals recorded, 40% were renewing from the previous year (2022). For vessel licences, 32% of persons renewing were doing so from the previous year. This gives an average of 38.6% for the number of renewals from the previous year for both vessels and licences, which is a marginal decrease over the previous quarter (43%).

As it relates to individual licences, since the start of the 2023 calendar year, 39% of individuals have been consistent in renewing their licence and this is an improvement over the average of 25% over the last 5 years.

| YEAR | Number of individual fisher licences issued | % renewing from the previous year |
|----------------------|---|-----------------------------------|
| 2017 | 2530 | |
| 2018 | 3467 | 19% |
| 2019 | 3654 | 26% |
| 2020 | 4979 | 24% |
| 2021 | 3995 | 25% |
| 2022 | 5687 | 20% |
| 2023 ** | 4510 | 39% |
| TOTAL: 28,822 | | Average: 26% |

Table 6: Number of individual fisher licences issued and renewal % (Excluding temporary permits)

** January to September 2023.



Part 3 – Fisheries Economic Performance

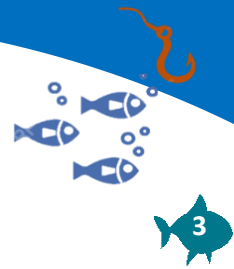
GDP Contribution

Fishers Socio-Economic Statistics

Fish Price Index



NFA's Public Relations Manager Ms. Abi-Gaye Smythe trying a sample of the Oyster Punch.



FISHERIES ECONOMIC PERFORMANCE

FISHERIES CONTRIBUTION TO GDP

In Volume 2, Issue 1 of the Quarterly Statistics Report, it was reported that Jamaica’s fisheries sector since 2018, averages USD103.8M annually or J\$16B at today's FX rate. The next Issue of this volume will highlight the contribution of the fisheries sector in 2023.

| GDP Contribution Based on Basic Prices (excluding taxes and subsidies on products) - \$'Million | | | | | |
|---|-----------|-----------|-----------|-----------|-----------|
| Total GDP | 2018 | 2019 | 2020 | 2021 | 2022 |
| | 15,000.65 | 15,000.81 | 13,000.88 | 14,000.67 | 16,000.04 |
| Agriculture, Forestry & Fishing | 1,014.8 | 1,018.9 | 1,004.3 | 1,087.6 | 1,185.9 |
| Fishing | 94.58 | 111.02 | 109.04 | 90.16 | 114.33 |
| % Contribution of fishing to Agriculture | 9.32% | 10.90% | 10.86% | 8.29% | 9.64% |
| % Contribution of fishing to total GDP | 0.63% | 0.74% | 0.84% | 0.64% | 0.71% |

Table 7: GDP Contribution (USD \$' Million) by the fisheries sector to Agriculture and Jamaica’s GDP.

The total fisheries contribution so far for 2023, is US\$73.34M (marine production at US\$70.51M and aquaculture production at US\$2.83M).

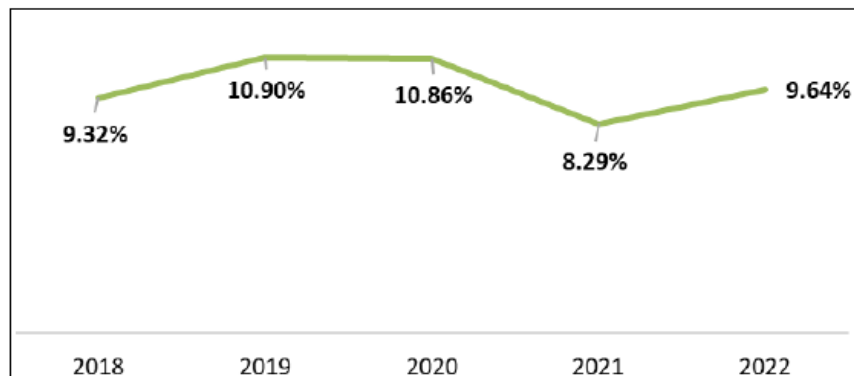
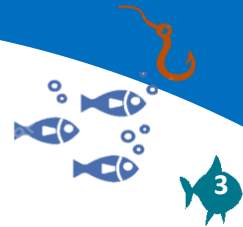


Fig. 16: The percentage contribution of fishing to the agriculture sector from 2018 to 2022



FISH PRICE INDEX

Table 8 Average Fin-Fish price per pound per parish during the period July – September 2023 (lowest prices highlighted in green and highest in red for the most common species).

| PARISH | SNAPPER | PARROT | DOCTOR | JACK | GRUNT | BARACUDA | TUNA | WRENCHMAN | KING FISH |
|----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| St. Ann | \$900 | \$850 | \$600 | \$800 | | \$700 | \$850 | \$900 | |
| St. Mary | \$900 | \$800 | \$700 | \$650 | \$650 | | \$700 | | |
| St. James | \$1,000 | \$900 | \$700 | \$1,000 | \$700 | \$1,000 | \$800 | | \$1,000 |
| Trelawny | | \$900 | \$900 | \$1,000 | \$900 | | | | \$1,000 |
| Westmoreland | \$850 | \$850 | \$800 | \$800 | \$800 | \$600 | | \$800 | \$700 |
| St. Elizabeth | \$900 | \$900 | \$800 | \$900 | \$900 | | | | \$700 |
| St. Catherine | \$850 | \$900 | \$700 | \$700 | \$650 | \$650 | \$700 | \$1,000 | \$600 |
| Kingston | \$900 | \$850 | \$650 | | \$600 | \$650 | | | |
| Hanover | \$850 | \$800 | \$800 | | \$800 | | \$600 | | |
| St. Thomas | \$750 | \$1,000 | \$700 | \$700 | \$700 | \$1,000 | | | |
| AVERAGE | \$878 | \$875 | \$735 | \$819 | \$745 | \$700 | \$720 | \$933 | \$800 |

Table 8 highlights the average finfish prices for nine fish types based on parish. The prices on average ranged from a low of \$600 (doctor and grunt) to a high of \$1000 for all fish except tuna, grunt and doctor. The parish with the highest-priced fish for the quarter was Trelawny and St. James.

FISHERS SOCIO-ECONOMIC STATISTICS

AGE STATISTICS OF FISHERS

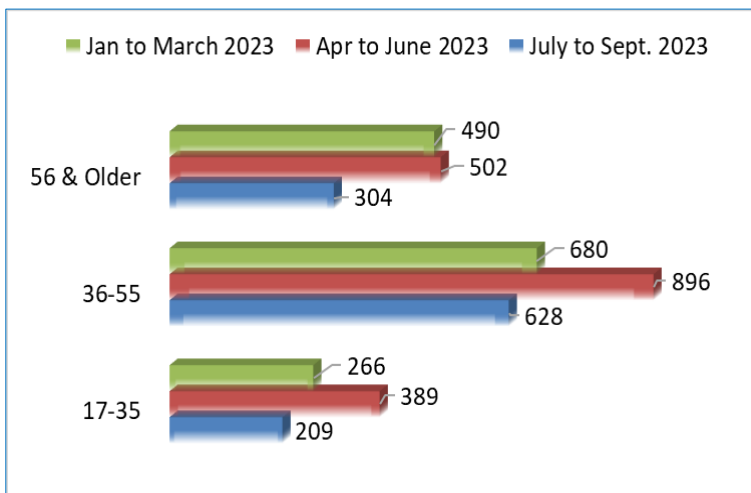


Fig. 17: Age of fisher renewal applications from Jan.– September 2023.

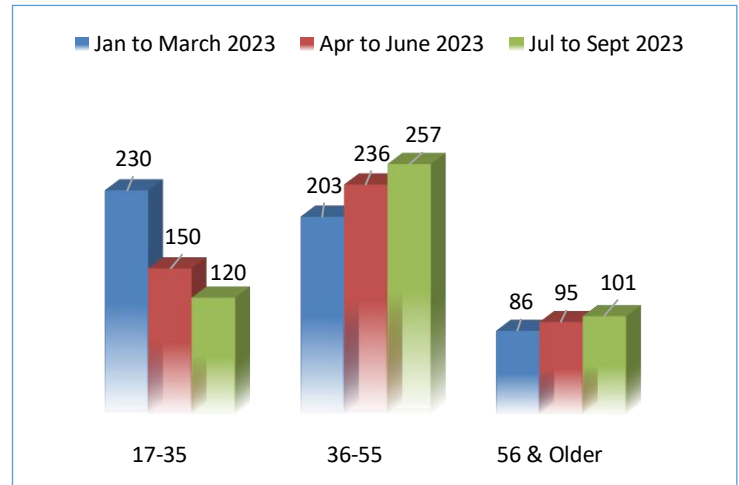
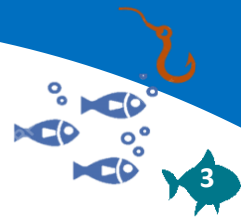


Fig. 18: Age of new fisher applications from Jan. – September 2023.



For the period under review (July – September 2023), the Authority reported a 20% decline in new applicants within the 17-35 age group when compared to the previous quarter. For fishers within the 36-55 age group, there was a 9% increase over the previous quarter. Additionally, there was a 6% increase in the '56 and older' age group in comparison to the previous quarter.

Most fishers renewing their licence were in the age group of 36-55 for the period July to September 2023, representing 47% of total applications renewed. The 17-35 age group for renewal applications recorded a 46% decline.

GENDER STATISTICS OF FISHERS

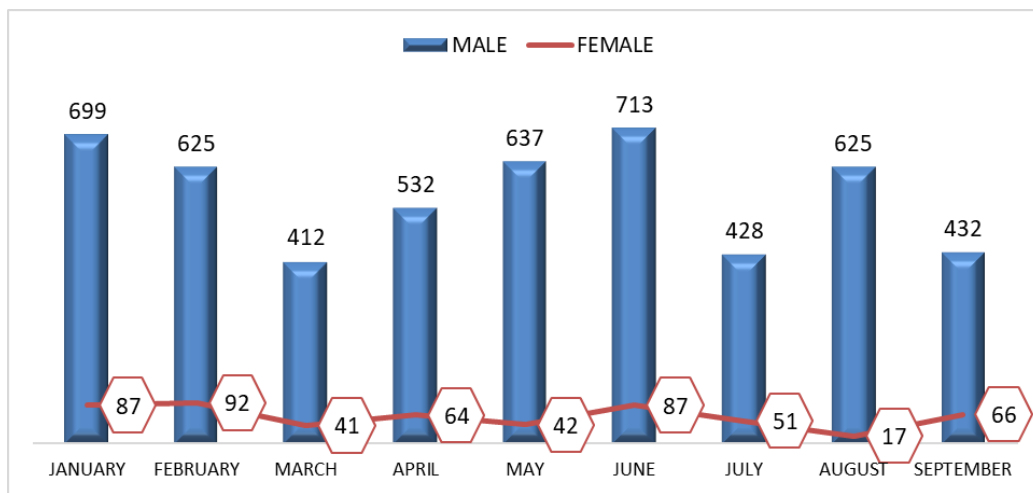


Fig. 19: Sex of fishers receiving licences from January – September 2023.

Jamaica’s fishery sector continues to be male dominated (Fig. 19); however, there was an increase in females receiving licences for the period under review recording 288% representing 66 applicants when compared to the 17 applicants in Q1. The number of females within the sector continues to increase steadily, for the period January – September 2023, 90% of the 5,650 licences issued were for male fishers. 10% were female fishers.

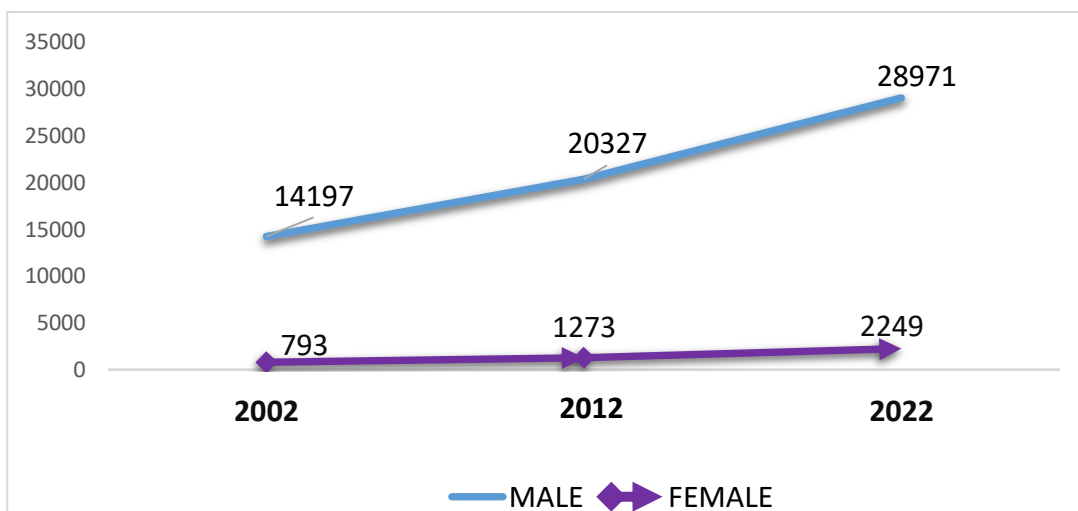


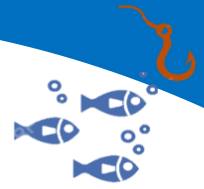
Fig. 20: 10-Incremental increase in registration of fishers by gender from 2002 to 2022



Part 4 – Conclusion



IrieFINS
JAMAICA'S FISHERIES AND AQUACULTURE
INFORMATION SYSTEM



This document (Volume 2: Issue 2 of the Jamaica Fisheries: Quarterly Statistics Report) highlighted the performance of the Jamaican fisheries sector over the first quarter of the Financial Year 2023 - 2024.

From the data presented, the artisanal fishery continued to play a critical role in food security accounting for 92% of total fish production. Marine fish production accounted for 4,102 MT, with the South Coast contributing 75%; value estimated at US \$45.5M. The NFA will continue its monitoring and engagement activities at varied landing sites across the island. The NFA takes into consideration reports made by fishers giving their account of the reason for their quantity of catch, and these were highlighted in the report. Aquaculture production also continues to play an important role in meeting the demand for protein and contributing to food security with 217.4 MT of tilapia being produced in Q2.

The report highlighted the important role that the fisheries sector plays in Jamaica's economic growth and through the Authority's initiatives and programmes, the sector is being positioned to yield greater economic returns. With a contribution of J\$17.7B towards GDP in 2022, the Authority aims to exceed that contribution at the end of the 2023 calendar year, and this will continue to be tracked in the Quarterly Statistics Report Volume 2 Issue 3.

The National Fisheries Authority continues to be strident in the execution of its mandate. For the quarter under review, there was a 13% increase in new vessel licences issued. The NFA continues its efforts towards increasing public awareness of the importance of licence renewal. The Authority continues its collaborative efforts with the security forces with 61 specialized joint inspections during the quarter. Persons charged with breaches of the Fishers Act recorded a 64% increase compared to the previous quarter.

With the National Fisheries Authority's increased sensitization efforts coupled with increased inspection and collaboration, the local fishers are recognizing the importance of complying with the law and are also being educated about the sector. There was a slight decline in compliance with renewing one's licence from the previous year; however, the Authority will continue to use focused enforcement strategies and licensing interventions to increase compliance.

The National Fisheries Authority will place increased focus on its data collection efforts, for both Capture Fisheries and Aquaculture. This will allow for greater statistical data output for the industry, which includes fishery pricing per parish, fishery species location, and production mapping.

