



National Fisheries Authority

JAMAICA FISHERIES:

Quarterly Statistics Report

Volume 2: Issue 3

October – December 2023



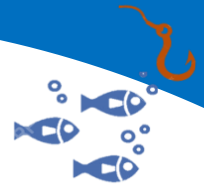
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Acknowledgements

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 who 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.

Special thanks to – Dr Zahra H. Oliphant, JP (Principal Director), Mrs. Anginette Murray (Statistician/Data Manager), Mr. Richard Barcoo (Chief Compliance Officer – Eastern), Mr. Lance McDonald (Licensing & Registration Manager), Ms. Abi-Gaye Smythe (Public Relations Manager), Ms. Leishan Tomlin (Senior Licensing & Registration Officer), and Ms. Altisha Hylton (Licensing & Registration Clerk).



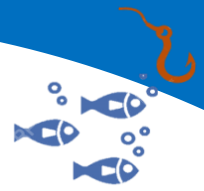
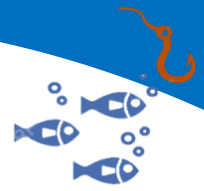


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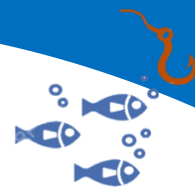


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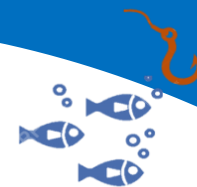
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Part 1 – Overview

3rd Quarter 2023/24 PERFORMANCE AT A GLANCE
WHO WE ARE - National Fisheries Authority





Q3 OCTOBER – DECEMBER 2023/24 PERFORMANCE AT A GLANCE

SUSTAINABLE FISHERIES



US \$216.4M Marine and Aquaculture Fish Production estimated value for 2023 equivalent to JMD 33.7B, based on estimated weight of 15,090.70 MT.

52% Increase in total marine fish production, 9,323.70 MT in 2022 vs 14,136.47 MT in 2023.

26% Marine Finfish Production recorded a 26% increase for the period October – December 2023, when compared to the same period in the previous year.

VESSEL MONITORING



Q3 2023/24 recorded a 25% increase in new vessel licences issued YoY for the same quarter Q3 2022/23 vs 2023/24.

35% Q3 2023/24 recorded a 35% increase in vessel licence issued YoY, Q3 2022/23.

SOCIO-ECONOMIC DATA



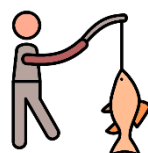
22% Increase YoY for female licensed fishers for Q3 2022/23 vs 2023/24 and 4% increase in Q3 2023/24 when compared to the Q2 2023/24.

17% 17% increase in the number of fishers renewing their licence within the 17-35 age group, when compared to Q2 2023/24. YoY Q3 recorded a 27% decline.

18% Increase in the 36 - 55 age group for new applicants for the period October – December 2023 when compared to the same period last year.

22% Increase in the 17 - 35 age group for the period October – December 2023 when compared to the same period last year for new applicants.

FISHERS STATISTICS



12% Number of fishing licences issued (new & renewed) in Q3 2023/24 vs Q2 2023/24.

7% Increase in the number of fisher licences issued in Q3 2023/24 [October – December] against the same quarter of the previous year 2022/23.

27% Number of fishers renewing their licence in Q3 2023/24 vs Q2 2023/24.

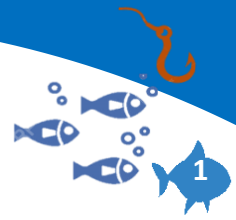
62% Increase in the annual licence renewal % rate against 2022 performance.

FISHERIES ECONOMIC PERFORMANCE



US\$142.44M Contribution from Capture Fisheries Production for Q1 – Q3, 2023/24.

US\$4.57M Contribution from Aquaculture Production for Q1 – Q3, 2023/24.



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.

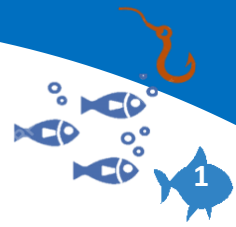
MISSION:

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.

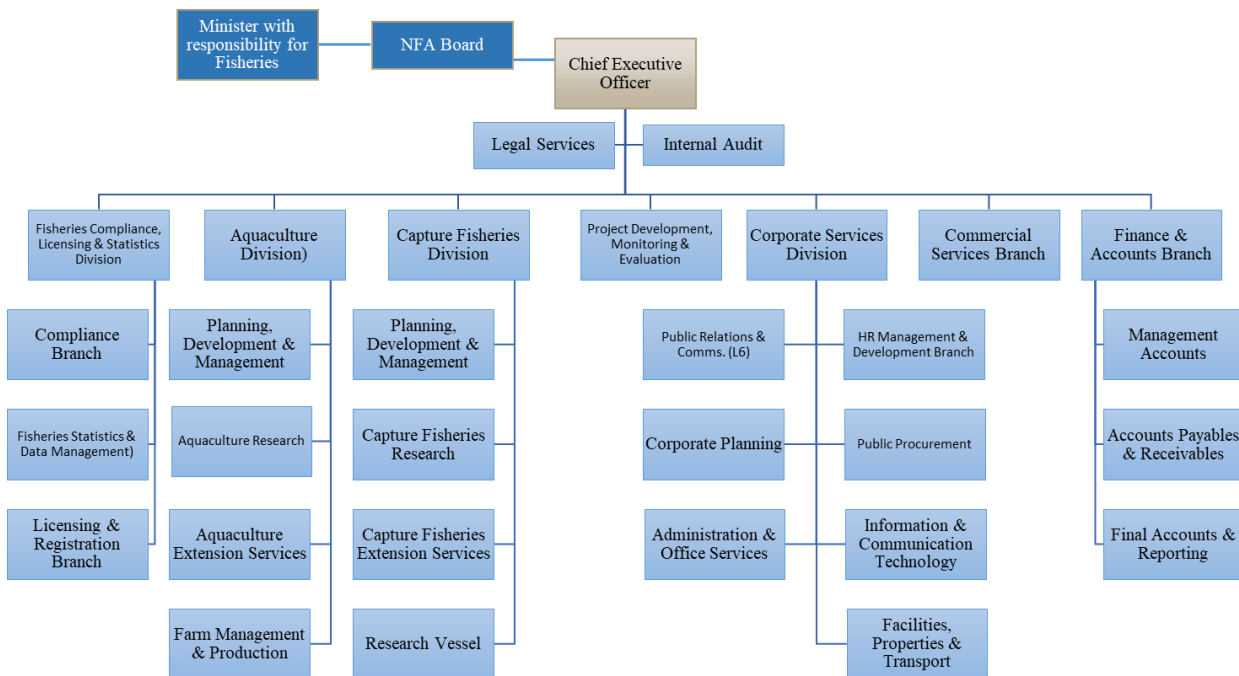


Fig. 1 General Organisational Structure of the National Fisheries Authority



National Fisheries Authority Corporate Head Office



SPECIAL FEATURE



Jamaica Fish Sanctuaries'

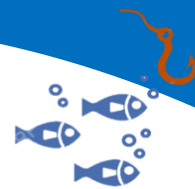


FISH SANCTUARY	REGION/ PARISH
Lucea	Lucea, Hanover
Grange Pen	Lilliput, St. James

FISH SANCTUARY	REGION/ PARISH
Three Bays	Hellshire, St. Catherine
Galleon Harbour	Old Harbour, St. Catherine
Salt Harbour	Salt River, Clarendon
Galleon St. Elizabeth	Crawford, St. Elizabeth
Sandals Whitehouse	Whitehouse, Westmoreland
Bluefields Bay	Belmont, Westmoreland

FISH SANCTUARY	REGION/ PARISH
Oracabessa Bay	Oracabessa Bay, St. Mary
Bowden Harbour	Bowden, St. Thomas
Bogue Island Lagoon	Bogue, St. James
Alligator Head	Turtle Crawl, Portland
Bird Cay	Pedro Banks (Off-shore)
White River	Ocho Rios, St. Ann

FISH SANCTUARY	REGION/ PARISH
Orange Bay	Orange Bay, Hanover
Montego Point	Montego Bay, St. James
Discovery Bay	Discovery Bay, St. Ann
Sandals Boscobel	Boscobel, St. Mary
Sandals Boscobel East	Boscobel, St. Mary
Sandals Boscobel West	Boscobel, St. Mary



Part 2 Statistical Performance

Fishing Vessel Licences

Fisher Licences

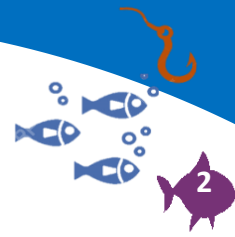
Fish Production Data

(A) Marine Production

(B) Aquaculture Production

Compliance Statistics





FISHING VESSELS

FISHING VESSEL REGISTRATION

STATISTICAL PERFORMANCE

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

For the period October – December 2023 (3rd Quarter 2023/24), 488 vessel licences were issued representing a 4% increase over the previous quarter. There was a 35% increase in total vessel license issued YoY for Q3 (2022/23 vs 2023/24). New applicants accounted for 115 of the total licences issued (see Figure 2), representing a 6% decline over the number of new applicants issued in the previous quarter. YoY for the same quarter Q3 2022/23 vs 2023/24 recorded a 25% increase in new vessel registration.

NEW VESSEL LICENSE ISSUED

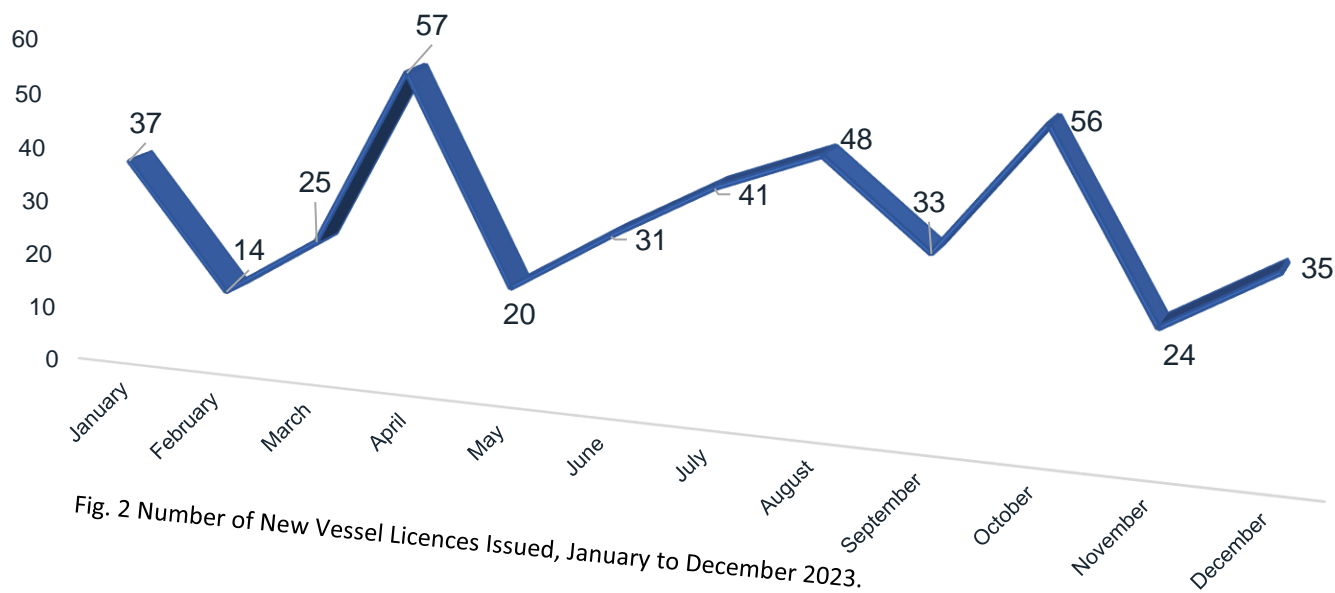
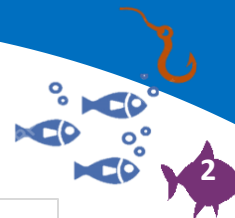


Fig. 2 Number of New Vessel Licences Issued, January to December 2023.



Photo: Members of the NFA Licensing & Registration Unit conducting an outdoor licensing session.





RENEWED AND NEW VESSEL LICENCES ISSUED

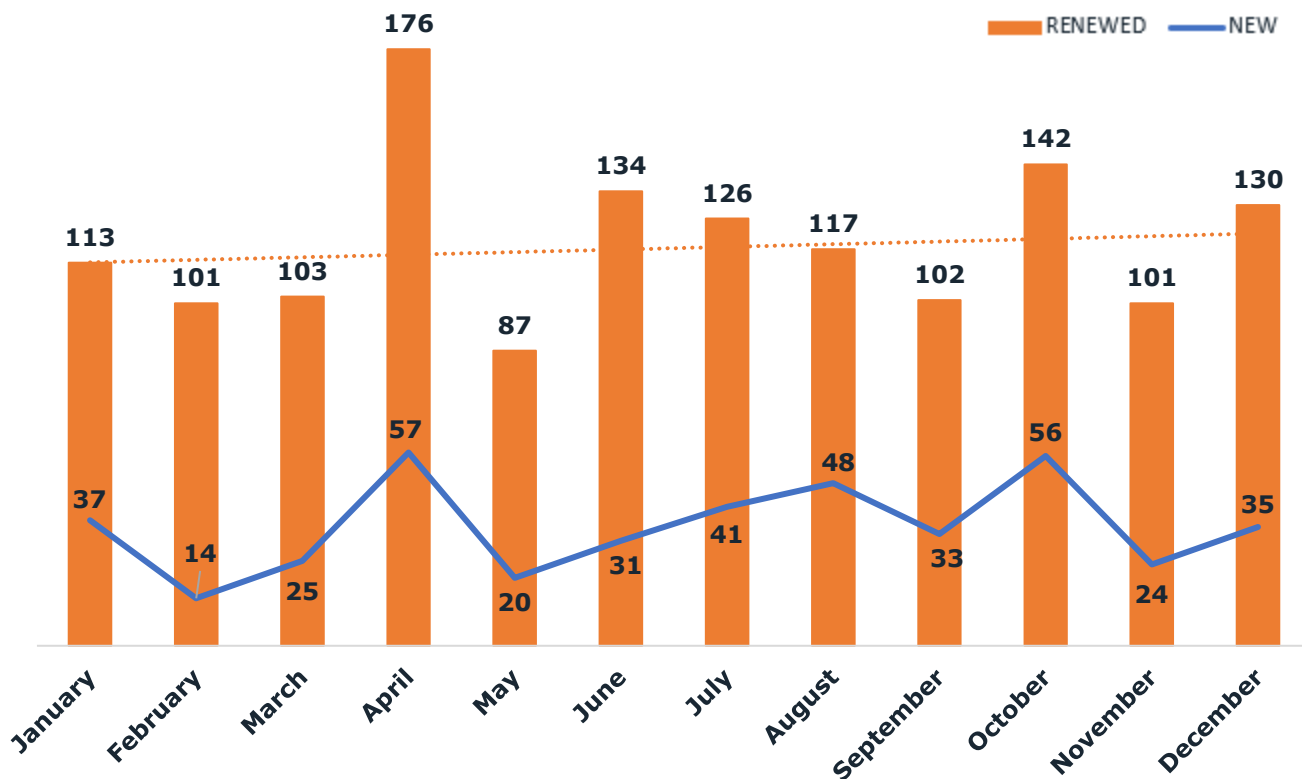


Fig. 3 Renewed and New Vessel Licence Issued (New and Renewed), January to December 2023.

Vessel Licences Issued, Q3 2022 vs Q3 2023

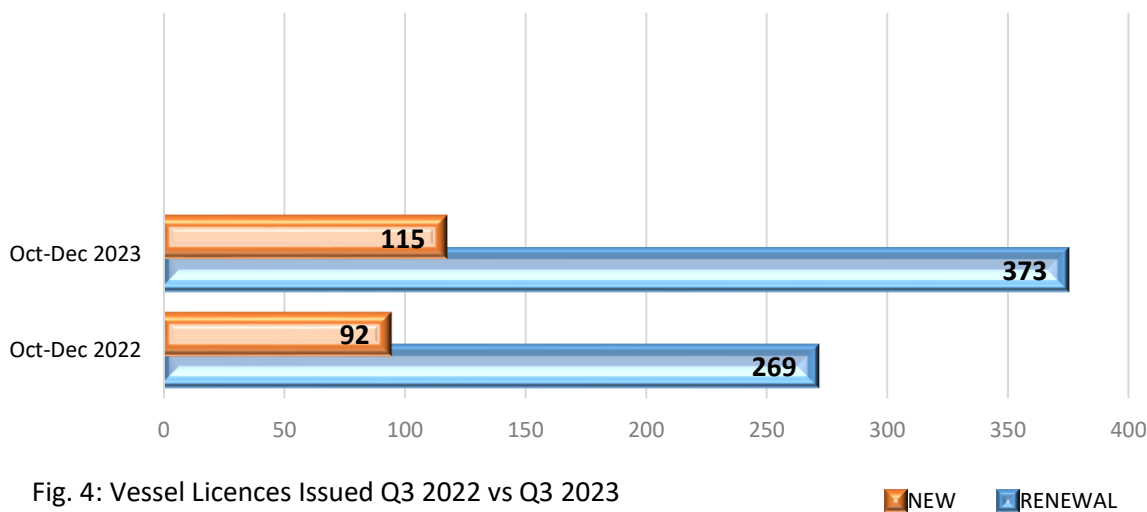
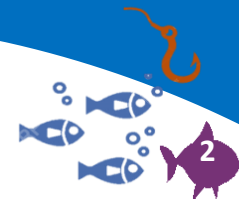


Fig. 4: Vessel Licences Issued Q3 2022 vs Q3 2023

With 488 vessel licences issued during the period October – December 2023, the overall monthly average for total vessel licences issued is recorded at 152 licence per month. The data in Figure 3 show the number of licences issued per month in 2023, April recorded the highest number of vessel licences issued in 2023.



Q3 2023/24 recorded a 35% increase in combined [Renewed and New] vessel licences issued when compared to Q3 2022/23. Renewed applications recorded a 38% increase and new applications reported a 25% increase for Q3 when compared to the same period last year. Artisanal fishing continues to account for the major category of total vessel licences issued, accounting for 88% of the total vessel licences issued from January to December 2023 (Table 1).



Photo: National Fisheries Authority's CEO Dr Gavin Bellamy, Licensing & Registration Manager Mr. Lance McDonald, and Licensing & Registration Officer Ms. Altisha Hylton aid the 1st Fisher being registered via the newly launched IrieFin platform.

NUMBER OF BOAT LICENCES ISSUED BY CATEGORY FROM JAN TO DEC 2023.														
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	%
ARTISANAL	139	95	105	196	96	153	157	142	115	173	115	154	1640	88.6
INDUSTRIAL	4	-	3	4	4	3	0	6	5	9	4	2	44	2.4
RECREATIONAL	5	11	3	10	3	6	10	13	9	10	3	6	89	4.8
**CAY	-	6	17	7	-	-	-	-	5	5	-	2	42	2.3
SPORTS CHARTER	2	5	-	9	-	-	-	4	1	1	3	1	26	1.4
TEMPORARY VESSEL CERTIFICATE	-	1	-	-	-	3	-	0	0	-	-	-	4	0.2
CONCH	-	-	-	7	-	-	0	0	0	-	-	-	7	0.4
TOTAL	150	118	128	233	103	165	167	165	135	198	125	165	1852	100

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

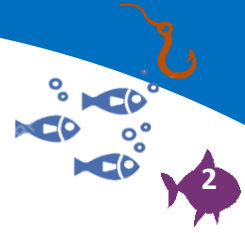
** Cay licences are submitted in January of each year; licences issued after this period were as a result of delays in documentation being received.

INDIVIDUAL FISHER LICENCES

FISHER LICENCES



1,813 fisher licences were issued in Q3 2023/24, with the highest number recorded in December (Figure 5). The 1,813 licences issued represent a 12% increase over the previous quarter and a 7% increase YoY. Q3 2023/24 recorded a 5% increase in new applications and a 27% increase in renewal applications, in comparison to the previous quarter Q2 2023/24.



NEW FISHER LICENCE ISSUED

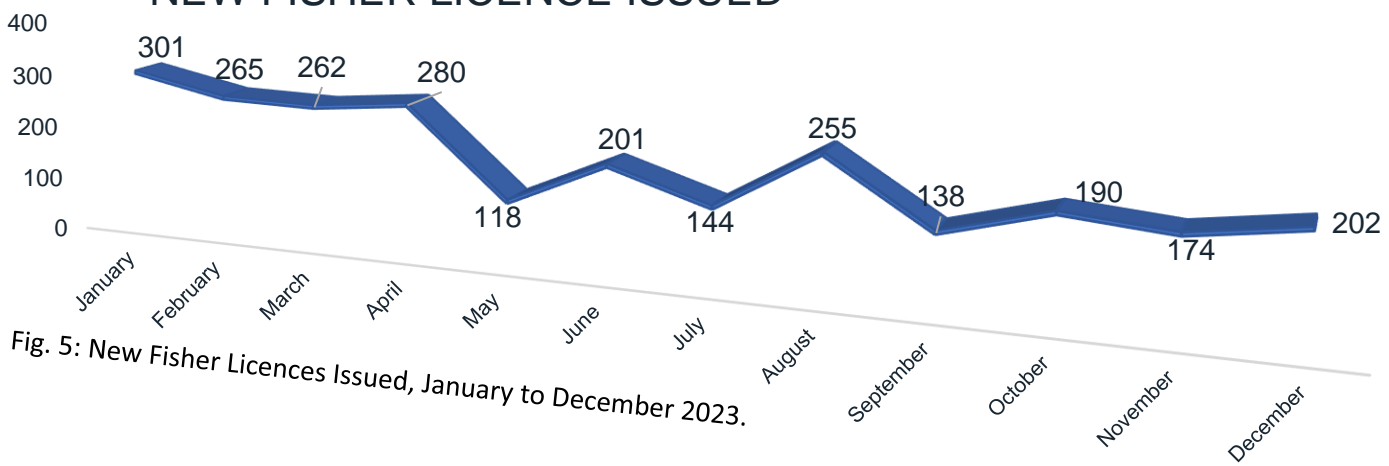


Fig. 5: New Fisher Licences Issued, January to December 2023.

Figure 7 highlights the total number of fisher licences issued per quarter. 2023 recorded increased numbers when compared to the previous year (2022).

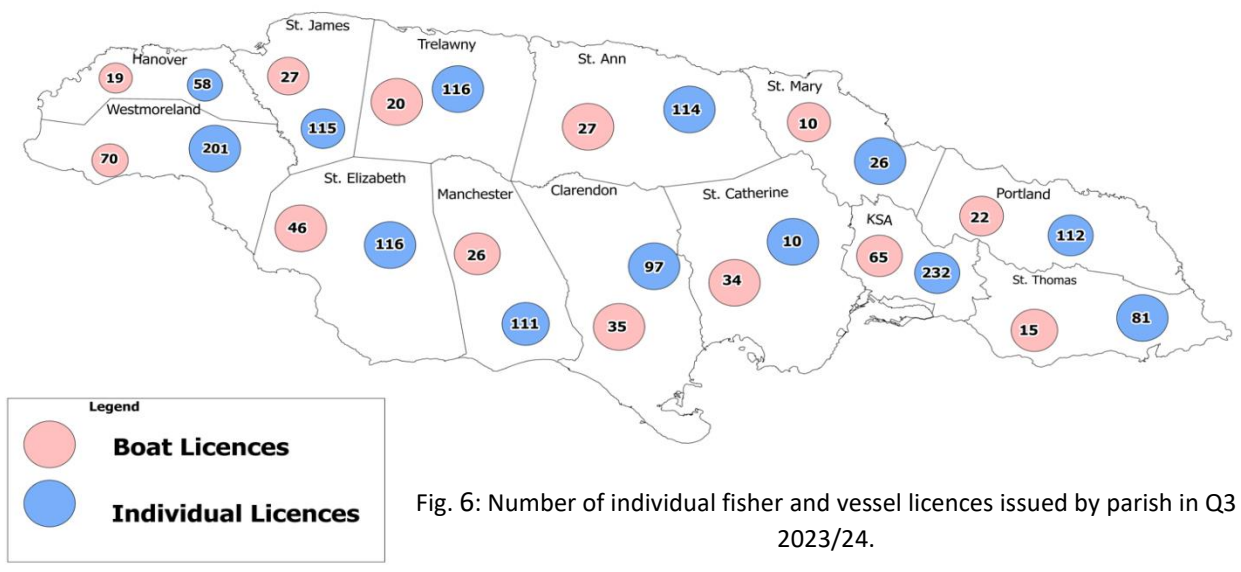


Fig. 6: Number of individual fisher and vessel licences issued by parish in Q3 2023/24.

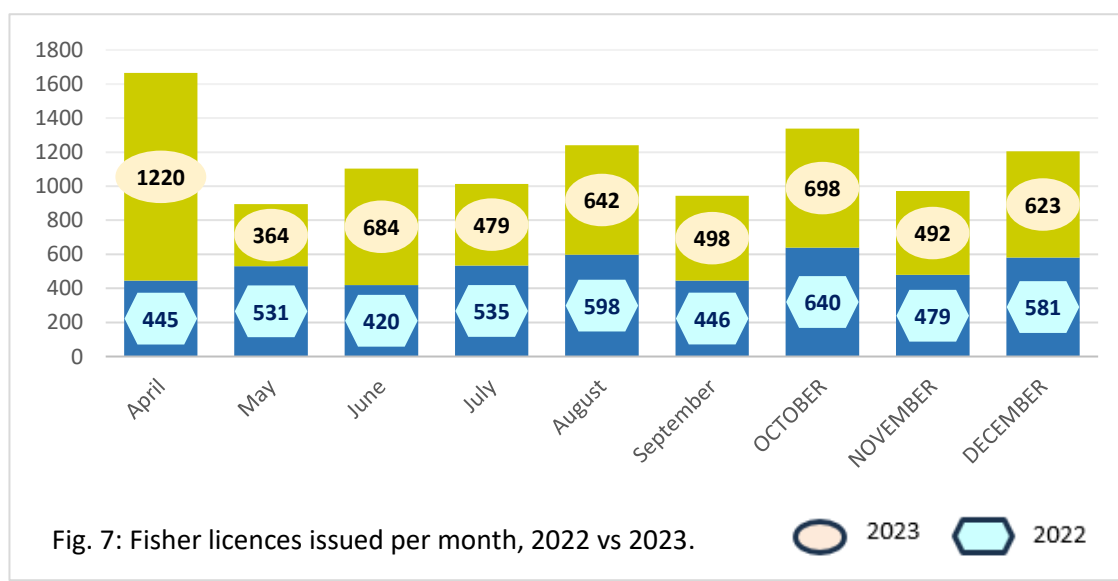
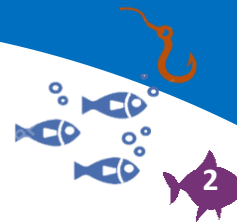


Fig. 7: Fisher licences issued per month, 2022 vs 2023.

2530
New Fisher Licences issued in 2023.



FISH PRODUCTION STATISTICS

MARINE PRODUCTION

STATISTICAL PERFORMANCE

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 325 species of fish being caught, compared to 350 species over the previous quarter (Q2). 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 October – December 2023, marine finfish production was 2,679.38 MT (Table 2, Fig. 8), representing a 26% increase YoY Q3, 2023/24 vs 2022/23. Additionally, the sector recorded a 26% increase YoY over the same quarter (2,125.8MT) of 2022. Production of 2,679.38 MT yields an approximate value of USD 36.8 Mil or ~ JMD\$ 5.7 billion (Table 2). The marine finfish production recorded a 62% increase in USD earnings YoY, USD 116.2 M in 2022 vs USD 188.5 M in 2023 (January to December). In Jamaican currency that equates to JMD\$ 17.8 billion for 2022 as against JMD\$ 29.2 billion for 2023.

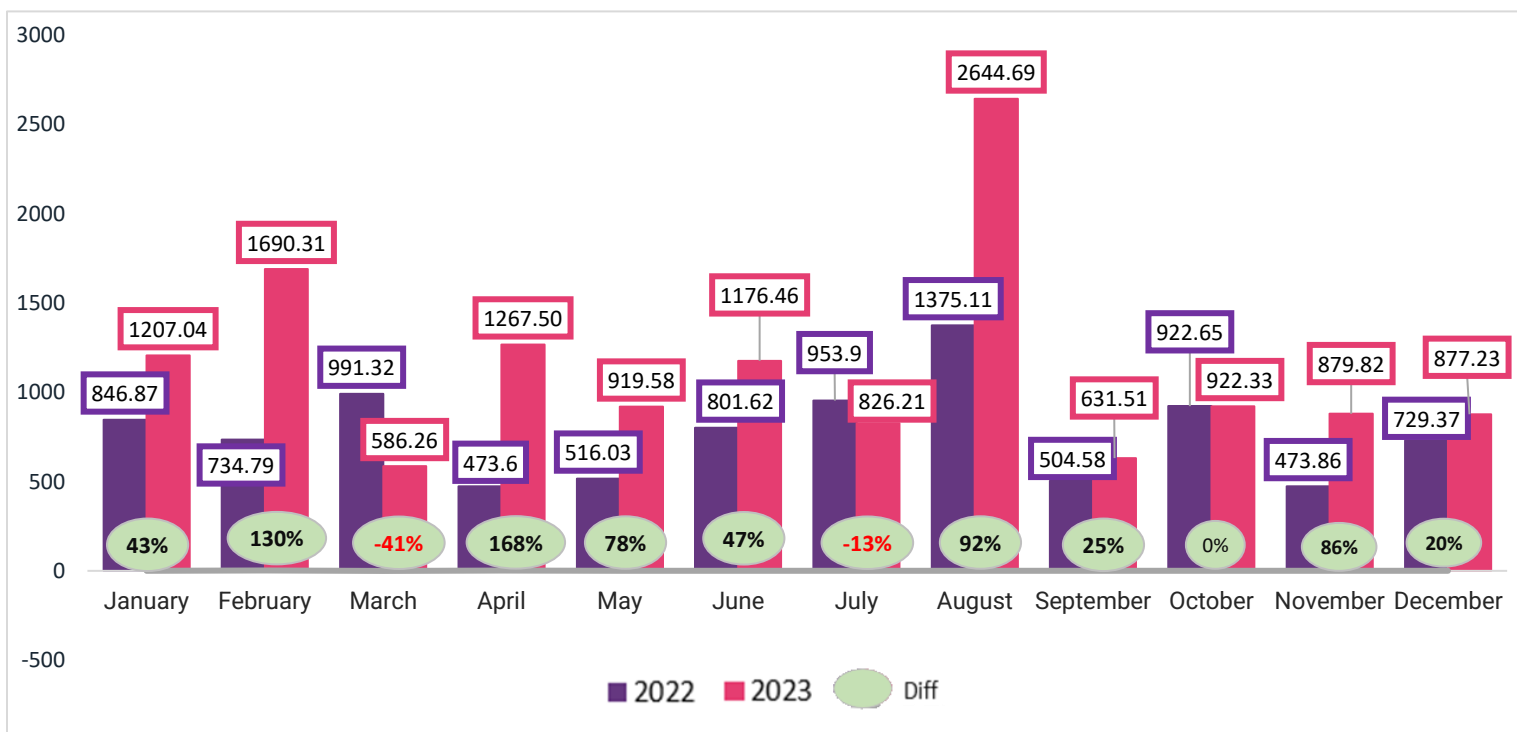


Fig. 8: Marine finfish production January – December [2022 vs 2023] in MT

*Jan – June 2023 Production figures were revised, referenced in Issue 1 and 2 of Volume 2.



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

2023 Month	Fish 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
January	1,207.04		4th Quarter FY 22/23	2,429,584,822.55		4th Quarter FY 22/23	15,781,648.73		4th Quarter FY 22/23
February	1,690.31			3,497,742,961.17			22,582,109.63		
March	586.26	3,483.60		1,193,424,100.00	7,120,751,883.72		7,818,041.93	46,181,800.29	
April	1,267.50		1st Quarter FY 23/24	2,425,912,125.01		1st Quarter FY 23/24	15,816,352.36		1st Quarter FY 23/24
May	919.58			1,958,121,061.63			12,624,894.01		
June	1,176.46	3,363.53		2,916,328,840.22	7,300,362,026.87		18,776,260.88	47,217,507.26	
July	826.21		2nd Quarter FY 23/24	1,770,418,201.96		2nd Quarter FY 23/24	11,391,919.45		2nd Quarter FY 23/24
August	2,644.69			5,938,021,557.62			38,176,813.41		
September	631.51	4,102.41		1,356,314,311.43	9,064,754,071.00		8,723,681.05	58,292,413.91	
October	922.33		3rd Quarter FY 23/24	1,983,546,493.33		3rd Quarter FY 23/24	12,755,310.79		3rd Quarter FY 23/24
November	879.82			1,875,748,658.18			11,989,444.92		
December	877.23	2,679.38		1,892,558,099.47	5,751,853,250.98		12,136,450.55	36,881,206.27	
TOTAL	13,628.92	13,628.92		29,237,721,232.57	29,237,721,232.57		188,572,927.73	188,572,927.73	

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

Fishery	Production (MT)												Total	% Composition
	2023													
	January	February	March	April	May	June	July	August	September	October	November	December		
Artisanal finfish	1,207.04	1,690.31	586.26	1,267.50	919.58	1,176.46	826.21	2,644.69	631.51	922.33	879.82	877.23	13,628.94	96.41
Sea Cucumber	0	0							0	0	0	8.28	8.28	0.06
Industrial Conch			0	9.43	41.31	103.81	8.98						163.53	1.16
Industrial Spiny Lobster*	37.18	28.03	44.98				0.00	16.04	31.28	100.36	43.42	34.43	335.72	2.37
Total Marine Production	1244.22	1718.34	631.24	1276.93	960.89	1280.27	835.19	2660.73	662.79	1022.69	923.24	919.94	14,136.47	100

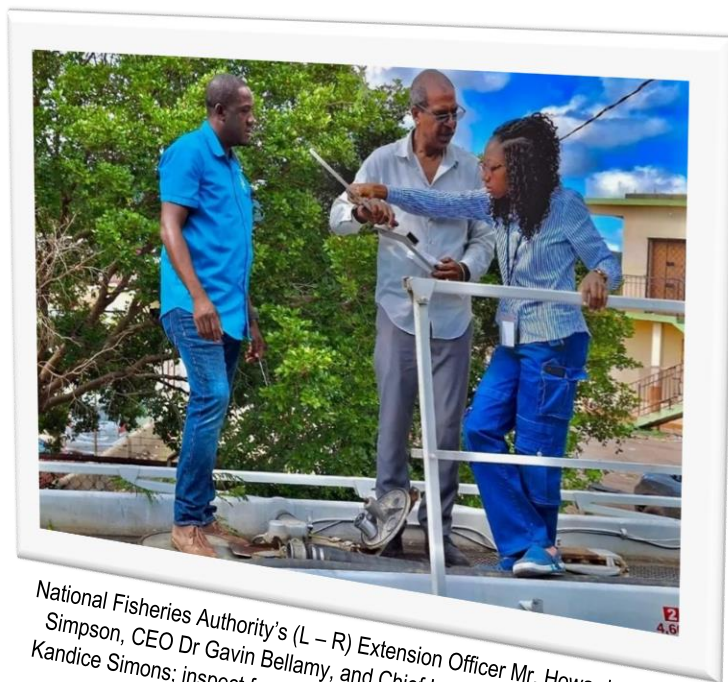
* Reported weight for whole, tail and head meat
Close Season

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

Fishery	Estimated Value (USD)												Total	% Contribution
	January	February	March	April	May	June	July	August	September	October	November	December		
Artisanal finfish	\$15,781,649	\$22,582,110	\$7,818,042	\$15,816,352	\$12,624,894	\$18,776,261	\$11,391,919	\$38,176,813	\$8,723,681	\$12,755,311	\$11,989,445	\$12,136,451	\$188,572,928	89.93
Industrial Conch			\$-	\$16,954	\$700,351	\$1,759,948	\$152,243						\$2,629,495	1.25
Industrial Spiny Lobster*	\$2,048,376	\$1,544,271	\$2,478,106				\$-	\$883,981	\$1,723,665	\$5,529,013	\$2,391,878	\$1,896,649	\$18,495,938	8.82
Total Marine Production	\$17,830,025	\$24,126,381	\$10,296,148	\$15,833,306	\$13,325,245	\$20,536,209	\$11,544,162	\$39,060,795	\$10,447,346	\$18,284,323	\$14,381,323	\$14,033,099	\$209,698,361	100.00



National Fisheries Authority's Licensing & Registration Manager Mr Lance McDonald engage fishers on the importance of being compliant with the Fisheries Act.



National Fisheries Authority's (L – R) Extension Officer Mr. Howard Simpson, CEO Dr Gavin Bellamy, and Chief Internal Auditor Ms Kandice Simons; inspect fuel being delivered at NFA Sub-Station.

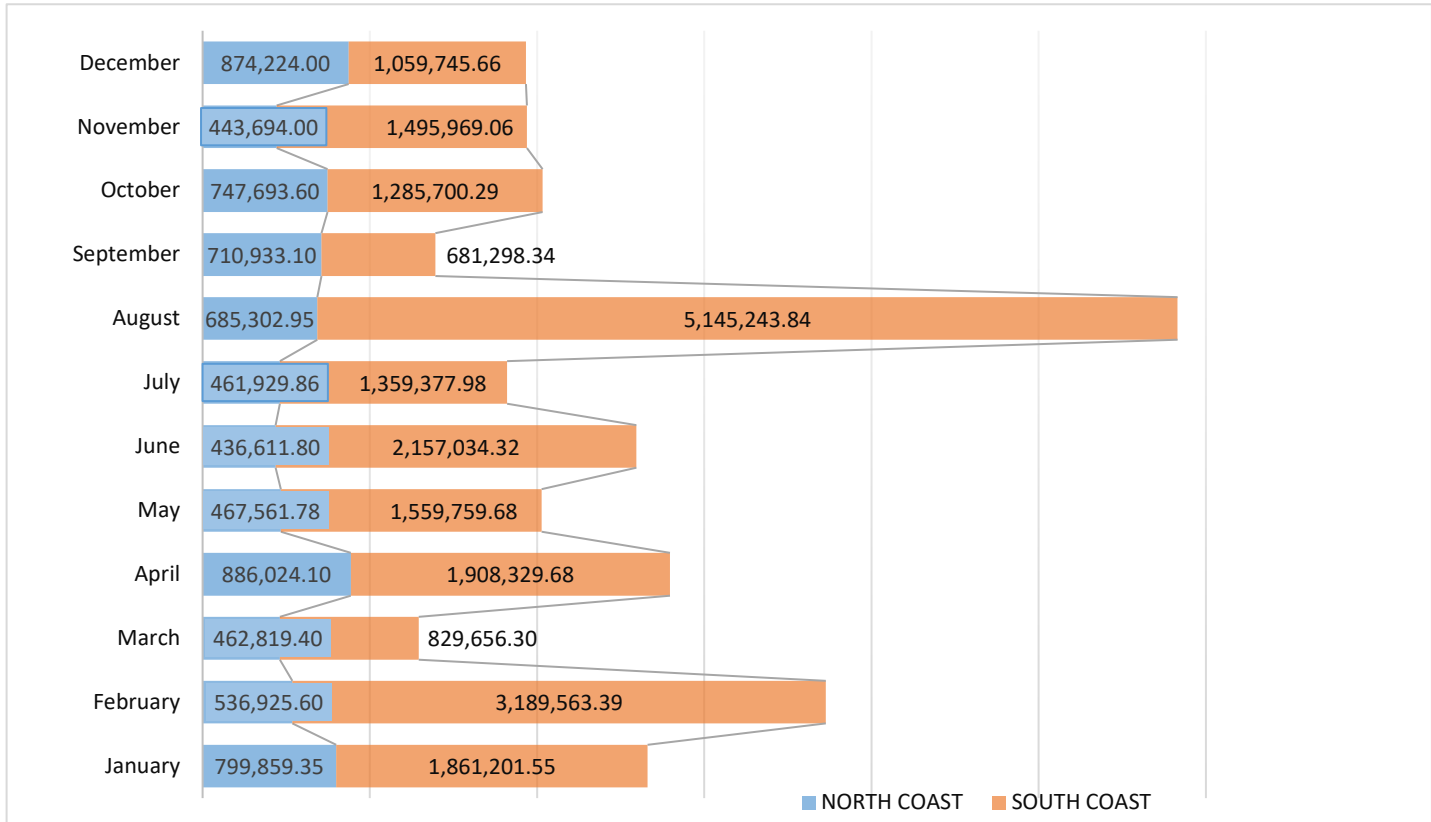
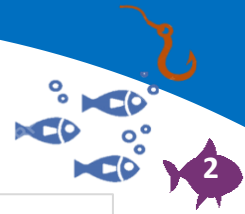


Fig. 9: Marine finfish production (pounds) by coastal region, January – December 2023.

97% of Jamaica's total marine finfish production was attributed to artisanal fishing for the 12-month performance [January to December 2023]. The month of August recorded the highest production levels, accounting for 19.5% of the 12-month total of 13.628.94 MT. Artisanal marine finfish 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 Banks, 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.

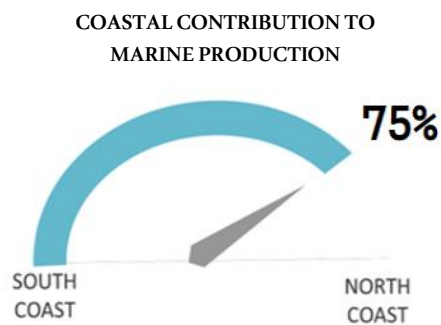
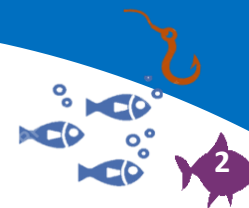


Fig. 10: Coastal region contribution to Jamaica marine finfish production (MT), January – December 2023.



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, inter alia. Fish migration, however, also presents some benefits as fish migration patterns, take 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 October – December 2023, the aquaculture sector harvested 277.73 MT of Tilapia. For the three quarters of 2023/24, 716.01 MT were harvested [220.9 Q1, 217.4 Q2, and 277.7 Q3] representing 65% [716 MT] of the total aquaculture annual target of 1,100 MT. This is valued at J\$710.32M or US\$4.57M.

Currently, there are 721.11 acres of tilapia ponds in production. Aquaculture Division has 137 registered fish farmers, currently, of which 111 are active in tilapia production.

The southern-central plains of St. Catherine and Clarendon continue to be the prevalent fish farming areas accounting for 85% of the total registered fish farms.



Aquaculture Extension Officer Clive Williams demonstrate the proper technique in using a net.

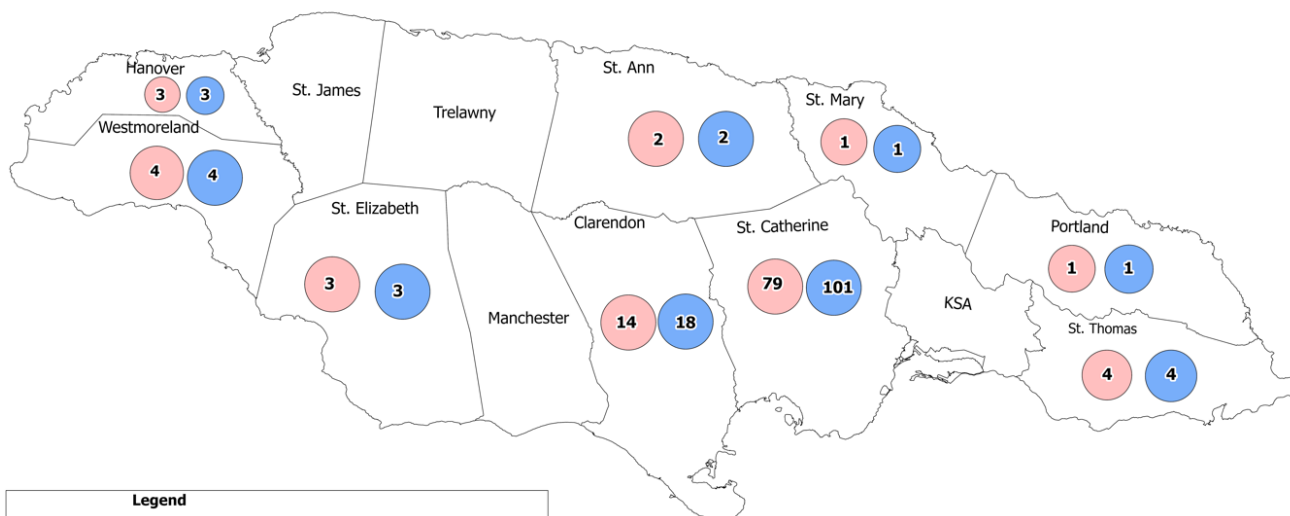
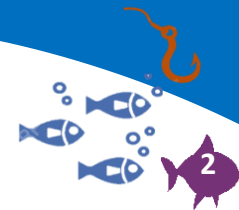


Fig. 11: Number of aquaculture farms and registered fish farm workers by parish, as of December 2023.



The Aquaculture Division continues its drive towards providing training and consultation to registered and prospective farmers within the sector. During the period October – December 2023, 42 persons were trained in aquaculture production techniques and good aquaculture practices. They were trained in pond management, water quality management, tilapia nutrition, and feed management.



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, with increased efforts in research, training and stock diversity. Most ornamental fish farmers are located 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.

There are three active oyster groups in Jamaica: **Western Supreme Oysters and More** in Westmoreland; **Kee Farms** in Portland; and **Green Island Fisher Folks** in Hanover in Q3 2023/24. The common species cultivated is the *Crassostrea rhizosphere* or cup oysters.



Photo: *Crassostrea rhizosphere* or cup oysters.

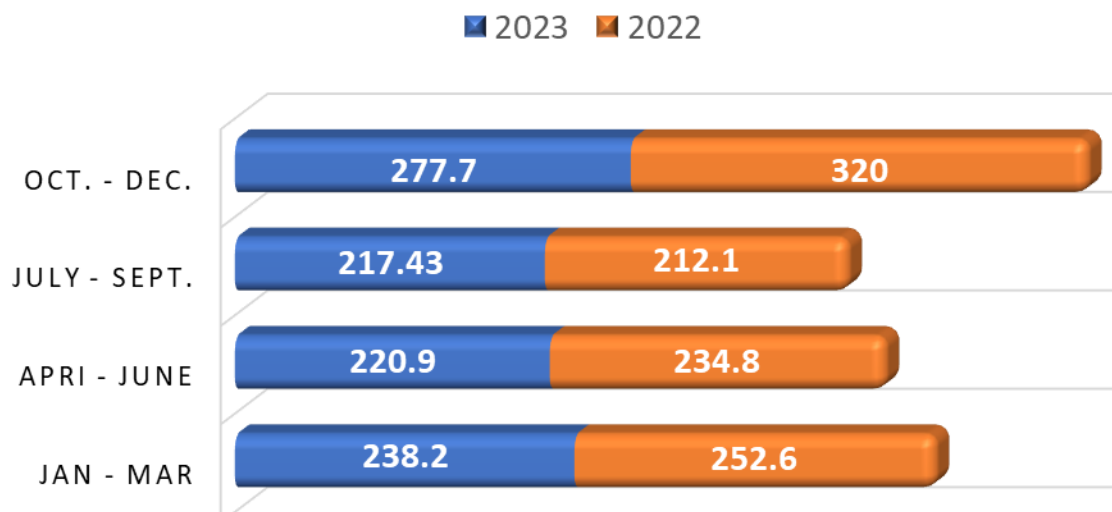


Fig. 13: Quarterly performance of Jamaica's aquaculture production (MT) 2022 vs 2023.

The Aquaculture Division of the NFA continues to produce and supply seedstock to fish farmers to stock their ponds. The Division has set a target for 2023/24 of 1.7M tilapia seed stock; as of December 2023, the Division is at 61% of its annual target, with Q1 recording 343,878, Q2 435,569, and Q3 264,613.

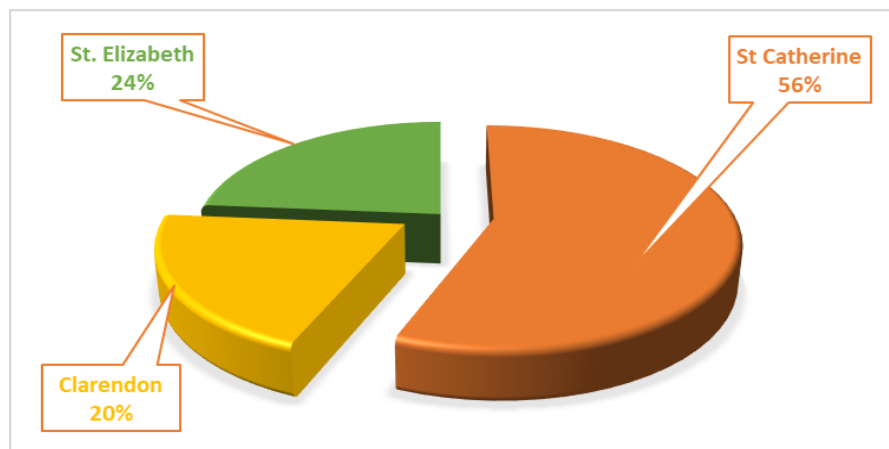


Fig. 14: Percentage of Aquaculture production per parish, 2023.

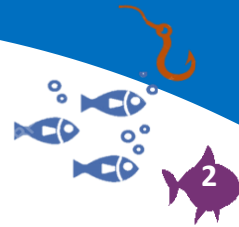
There has been an increase in marketing campaigns targeting tilapia consumption with the intention being to increase the uptake of farmed fish by consumers. Fish farmers continue to rely on vendors to buy and distribute their products from farm-gate to the markets. With plans to increase data collection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



Photo: Aquaculture Extension Officer Mr Keno Garvin conducting a face-to-face training with local fish farmers.



NFA Aquaculture Team in Tanzania, Africa for training in operation of the Recirculating Aquaculture System (RAS).



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 Q3 (October to December) remains the same at \$450 per pound.

COMPLIANCE STATISTICS

The Compliance Branch conducted more than 805 site visits to fishing beaches, marinas, restaurants, tournaments, seafood stores, rivers, fish farms, supermarkets, and wholesales in Q3. The Authority continues its specialized joint inspections with the Jamaica Constabulary Force and the Jamaica Defence Force; this resulted in 36 arrests. The Unit continues its robust monitoring, control, and surveillance efforts resulting in a 22% [749] increase in inspections carried out in Q3 as against [614] in Q2, there was an 80% [\$1,980,000] increase in fines when compared to Q2 \$1,100,000 performance. There was also a 5% increase in the number of court appearances during the October to December 2023 period.



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

2019	2020	2021	2022	2023	TOTAL
\$2,642,000	\$180,000	\$1,145,000	\$1,004,000	\$4,806,700	\$9,777,700

Based on the data presented in Table 5, 2023 recorded the highest value for fines issued through the courts since 2019.

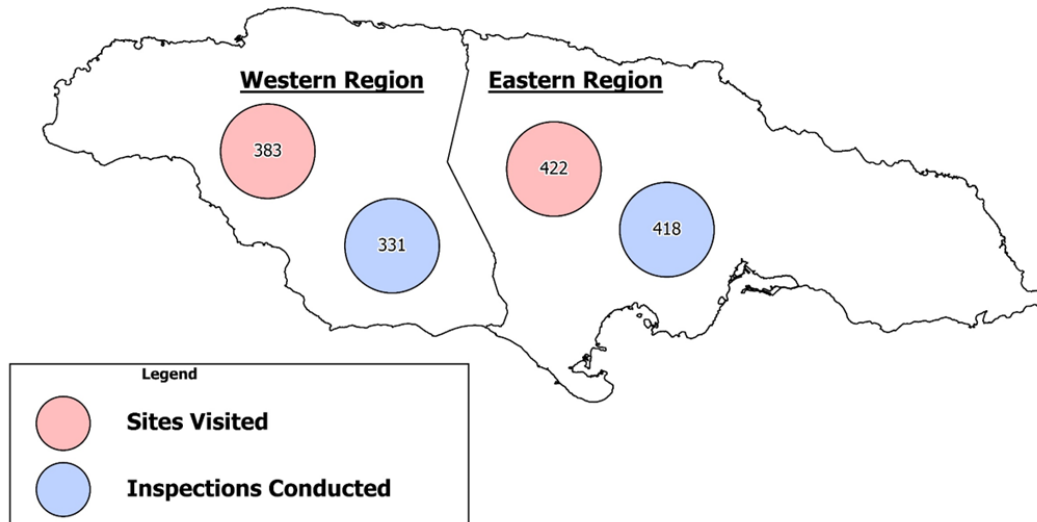
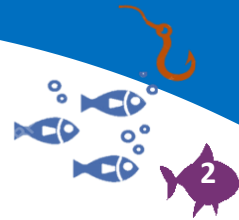
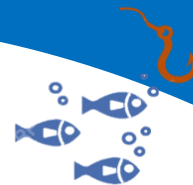


Fig. 15: Total number of compliance site visits and Inspections conducted by region within Q3 FY-2023/24.

The Fisheries Compliance Licensing and Statistics Division continues to support local fishers towards being compliant with their licence renewal. For 2023, the number of applicants renewing their licence over the previous year (2022) was recorded at 38%. This represents a 62% increase when compared to 2022 (20%). This gives an average of 25% for the number of renewals from the previous year for both vessels and individuals.

YEAR	% renewing from the previous year
2017	
2018	19%
2019	26%
2020	24%
2021	25%
2022	20%
2023	38%
Average: 25%	

Table 6: Fisher and Vessel Licences Renewal % issued from; 2018 – 2023. (Excluding temporary permits)

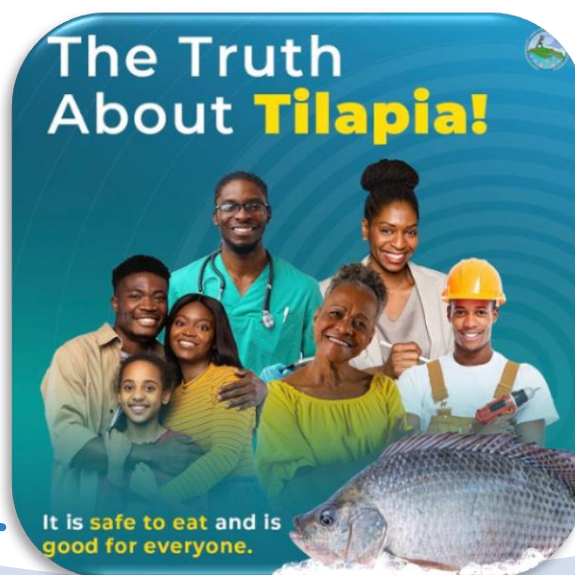


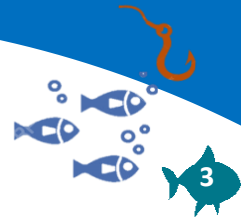
Part 3 – Fisheries Economic Performance

GDP Contribution

Fishers Socio-Economic Statistics

Fish Price Index





FISHERIES ECONOMIC PERFORMANCE

FISHERIES CONTRIBUTION TO GDP

In Volume 2, Issue 3 of the Quarterly Statistics Report, it was reported that Jamaica's fisheries sector since 2018, averages USD118.3M annually or J\$18B at today's FX rate.

GDP Contribution Based on Basic Prices (excluding taxes and subsidies on products) - \$'Million						
	2018	2019	2020	2021	2022	2023
Total GDP	15,650.65	15,810.81	13,880.88	14,670.67	17,100.04	18,760.00
Agriculture, Forestry & Fishing	1,014.84	1,018.94	1,004.30	1,087.60	1,185.94	1,519.56
Fishing	94.58	111.02	109.04	90.16	116.29	216.4
% Contribution of fishing to Agriculture	9.32%	10.90%	10.86%	8.29%	9.81%	14.24%
% Contribution of fishing to total GDP	0.60%	0.70%	0.79%	0.61%	0.68%	1.15%

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

The total fisheries contribution for 2023, is US\$216.4M (marine production at US\$209.6M and aquaculture production at US\$6.8M).

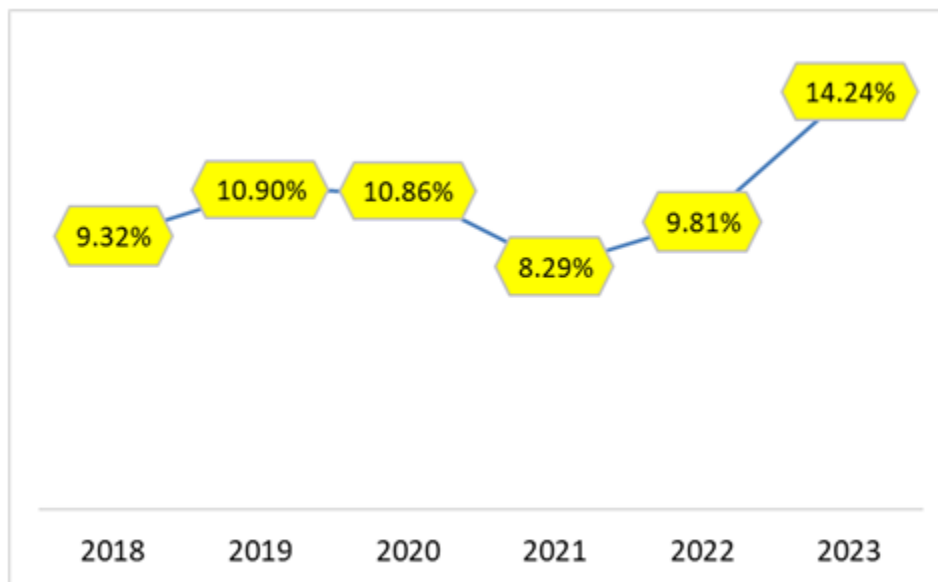
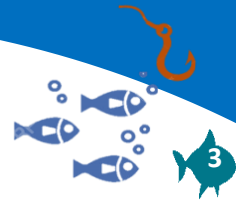


Fig. 16: The percentage contribution of fishing to the agriculture sector from 2018 to 2023



FISH PRICE INDEX

Table 8 Average price at first purchase from fishers by parish during the period October – December 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	\$900	\$650	\$750		\$700	\$850	\$900	
St. Mary	\$850	\$900	\$700	\$700	\$650		\$750		
St. James	\$950	\$900	\$750	\$900	\$750	\$850	\$800	\$850	\$900
Trelawny	\$900	\$950	\$800	\$950	\$800	\$700			\$950
Westmoreland	\$850	\$900	\$850	\$800	\$750	\$650		\$800	\$850
St. Elizabeth	\$850	\$1,000	\$800	\$850	\$800				\$800
St. Catherine	\$850	\$900	\$700	\$700	\$650	\$650	\$700	\$1,000	\$750
Kingston	\$900	\$950	\$750	\$800	\$650	\$700			\$850
Hanover	\$850	\$800	\$800		\$800		\$650		
St. Thomas	\$750	\$850	\$700	\$700	\$700	\$900			\$950
AVERAGE	\$865	\$905	\$750	\$794	\$728	\$736	\$750	\$888	\$864

Table 8 highlights the average finfish prices for nine fish types based on parish. The prices on average ranged from a low of \$650 (Doctor and Grunt) to a high of \$1000 (Parrot and Wrenchman). The parish with the highest-priced fish for the quarter was Trelawny. The lowest fish species (Doctor and Grunt) recorded an 8% increase in price moving from an average of \$600 in Q2 to \$650 in Q3. No movement in price was recorded for Parrot and Wrenchman for Q3.

FISHERS SOCIO-ECONOMIC STATISTICS

AGE STATISTICS OF FISHERS

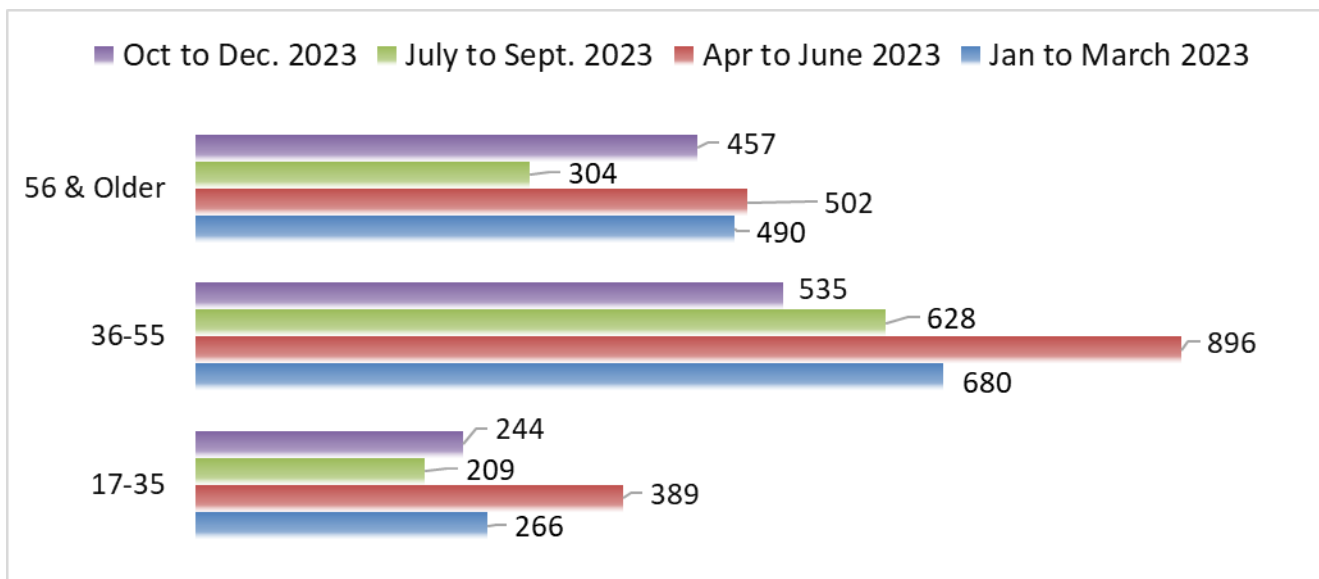
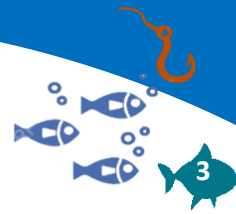


Fig. 17: Age of fisher renewal applications in 2023.



■ Jan to March 2023 ■ Apr to June 2023 ■ July to Sept. 2023 ■ Oct to Dec. 2023

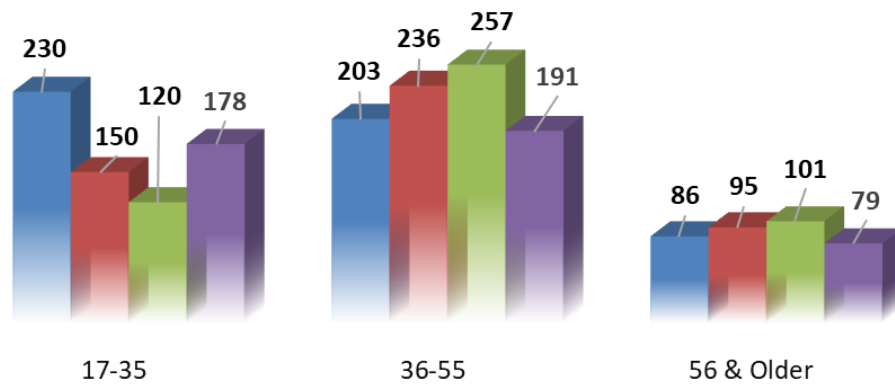


Fig. 18: Age of new fisher applications in 2023.

For the period under review (October – December 2023), the Authority reported a 48% increase 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 26% decline over the previous quarter. Additionally, there was a 22% decline 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 October to December 2023, representing 43% of total applications renewed. The 17-35 age group for renewal applications recorded a 17% increase against the previous quarter.

GENDER STATISTICS OF FISHERS

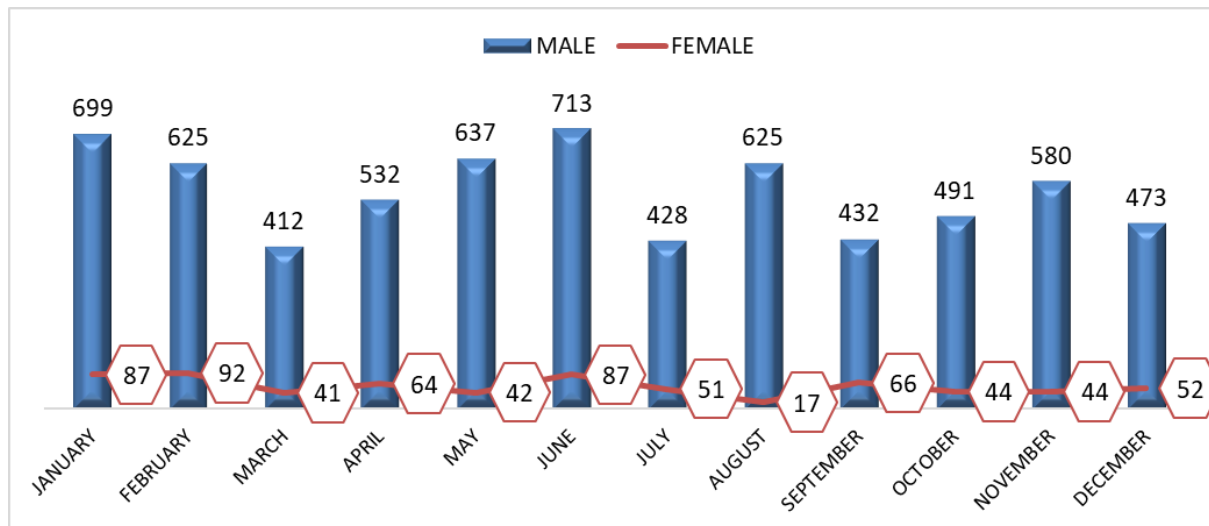


Fig. 19: Sex of fishers receiving licences for 2023.

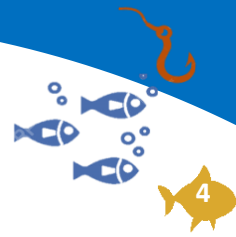
Jamaica’s fishery sector continues to be male-dominated (Fig. 19); however, there was a marginal increase of 4% in females receiving licences for the period under review representing 140 applicants when compared to the 134 applicants in Q2. The number of females within the sector continues to increase steadily, for 2023, 90% of the 7334 licences issued were for male fishers. 10% were female fishers.



Part 4 – Conclusion



Blue Justice
CARIBBEAN HUB



This document (Volume 2: Issue 3 of the Jamaica Fisheries: Quarterly Statistics Report) highlighted the performance of the Jamaican fisheries sector over the third 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 97% of total fish production. Marine fish production accounted for 2,679 MT, with the South Coast contributing 75%; value estimated at US \$36.2M. 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 277.7 MT of tilapia being produced in Q3, resulting in the total production for the three quarters of 2023/24 at 716.01 MT with an estimated value of US 4.57M.

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\$33.7B towards GDP in 2023, this represents an 86.1% increase when compared to the previous year of J\$18.1B. Jamaica's fishery industry contributes 14.2% to Jamaica's agriculture sector and 1.1% to Jamaica's GDP for 2023.

The National Fisheries Authority continues to be strident in the execution of its mandate. For the quarter under review, there was a 25% increase in new vessel licences issued YoY [Q3 2022/23 vs Q3 2023/24]. Additionally, a 4% increase was recorded for the combined [new & renewal] vessel licence issued in Q3 compared to the previous quarter. 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 36 arrests within the quarter. Additionally, there was a 22% increase in the number of inspections carried out when 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 9% increase in compliance with renewing licences from the previous year; the Authority will continue its enforcement strategies and licensing interventions to ensure increased 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.

