

JAMAICA

The domestic marine fishing industry in Jamaica is characterized by a widening gap between demand and supply. Demand for marine seafood products continues to increase dramatically in Jamaica while the domestic supply of seafood products is in decline. Even a domestic catch of 10,300 metric tons of marine and inland fish in 1993 was not sufficient to meet demand in Jamaica. It has been estimated that local production provided about half of all fish consumed on the island. Tropical reef fish such as the large Red Snapper and Grouper have virtually disappeared from Jamaican waters. Resources such as shark and certain pelagic species (tunas, dolphins) are under-utilized and every effort is being made to explore these species for domestic consumption as well as export.

The declines are primarily due to over-exploitation of the resources. The reclamation of mangrove swamps for tourism and other development has contributed to the problem. The mangroves were important nursery grounds for lobster, fish and conch. In addition, destructive fishing practices and poaching by foreign fishing vessels with highly sophisticated equipment have contributed to the declining marine resources in Jamaica.

The Jamaican fishing industry provides employment for some 12,000 fishermen operating a fleet consisting of approximately 7,000 vessels from the island's 184 beaches. The major fishing grounds are the island shelf and its nine proximal banks which have a total area of 4,170 sq.km and Pedro Bank which has an area of 7,900 sq.km. The majority of fishermen operate from South Coast beaches, mainly fishing the shelf area about 20 miles offshore.

There are concerns within the Jamaican fishing industry that if current practices are not changed, then the marine fishing industry may disappear. To this end, a marine area known as the "Exclusive Economic Zone (EEZ)" increasing its territorial waters from 12 miles to 200 miles. This new piece of legislation gives the Jamaican Government rights and jurisdiction over the Zone and therefore has sovereign rights in respect of exploration, exploitation and conservation among other things.

The Jamaican Government has actively encouraged the development of an inland aquaculture fishing sector. Over the last decade, production has increased dramatically as the products have gained widespread acceptance and fish farming has proved to be a very lucrative enterprise. Today there are over 650 pond acres of commercial fish farms in Jamaica, which grow mainly silver perch, although there is a growing interest in other species of fish.

Previously, only the Jamaica Commodity Trading Company Limited (JCTC) could import salted fish and sardines, since these commodities were subsidized by the Jamaican Government. With the removal of subsidies on salted fish, the Government deregulated the market for salted fish and the private sector can now import the fish directly and not purchase directly from the JCTC. In 1992, imports of fish and fish products totalled approximately US\$22.7 million.

The main species imported by Jamaica are cod, mackerel, herring, alewives, shrimp, sardines, snapper, shark, croaker, grouper and sea trout. The Jamaican market for fish and fish products is substantially large and has not decreased despite recent initiatives to upgrade and develop a viable local fishing industry. Salted fish, herring and mackerel have good potential as exports to this market, due to the fact that these species satisfy the means of the low-income earners diet. Salted fish is especially important because it is one of the main ingredients in Jamaica's national dish.

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