

Jamaica's Mining and Quarrying Sector Performance 2024

A synopsis of mineral production, use and exploration in Jamaica in 2024

GENERAL SECTOR PERFORMANCE

Bauxite and alumina production traditionally dominates Jamaica's mineral portfolio whereas various industrial minerals that are largely consumed in the Construction Sector are produced in lesser quantities (Table 1).

The Mining and Quarrying Sector contributed 1.8% to Jamaica's Real Gross Domestic Product (GDP) in 2024, the same as in 2023, but lower than the 2.4% in 2019. The Sector is still the lowest performer of the Goods Producing Sectors, where Manufacturing, Agriculture and Construction lead by almost four-fold. Bauxite and Alumina, however, continue to dominate traditional exports, particularly over agricultural produce. Mining contributed US\$760.8 Million in export earnings in 2024; 38% more than in 2023, and 7% less than that for 2019 when the contribution was US\$814.2 Million. Despite this low performance, the Mining and Quarrying Sector has the potential to contribute significantly to the Jamaican economy.

MINERAL PRODUCTION

Bauxite and Alumina: Bauxite is the only metallic mineral currently mined in Jamaica. Approximately 5.89 million tonnes (Mt) were produced in 2024, of which 28% was exported as crude bauxite by Discovery Bauxite Partners, mostly to the USA, with a small batch of 8,000 tonnes sent to Turkey. The difference of bauxite was processed to alumina at the JAMALCO and WINDALCO (Ewarton) alumina plants. These two companies shipped approximately 1.53 Mt of

alumina to various global destinations with JAMALCO accounting for 62% of the exports. Between the companies the largest quantities of alumina were exported to Russia (28%), Netherlands (22.5%), USA (19%) and Iceland (17%), mostly for smelting (smelter grade alumina) to obtain aluminium. Smaller amounts were also sent to Canada, Latvia, Ghana, Cameroon and Georgia. Approximately 90.3 thousand tonnes (Kt) of the alumina produced was exported as alumina hydrate mostly to the USA and a small amount to Georgia for use as specialty alumina in non-metallurgical and chemical industrial purposes.

Limestone: This commodity is largely consumed in the Construction Sector where it is crushed to make aggregate and as a main input for making Ordinary Portland Cement (OPC) and industrial lime. Some crushed limestone of high purity is used as calcium carbonate for the manufacture of paints, plastics, animal feed and soaps. Production of hard limestone increased by 300 Kt from 2023 to nearly 2.2 Mt. However, there was a decrease in production of the Whiting variety of limestone which is used in specific industrial applications like food and pharmaceuticals which demand high quality stone. This was a 33% decrease from the 2023 output of over 245 Kt which was the highest production over the last decade.

Marl and Fill: This low-value bulk construction material showed a sharp increase in production driven particularly by demand from local large infrastructure projects in St. James and St. Thomas.

Table 1. Production of Minerals in Jamaica, 2020 - 2024 ('000 tonnes)

Commodity	2020	2021	2022	2023	2024
Bauxite	7,546.1	5,949.6	4,364.7	5,988.1	5,888.9
Alumina	1,620.9	1,158.5	634.1	1,400.8	1,481.2
Limestone (Hard) ¹	2,467.0	2,858.9	2,291.5	1,898.2	2,194.1
Limestone (Whiting) ²	124.5	144.9	125.1	245.1	163.5
Marl and Fill ³	1,046.9	505.2	443.7	595.4	742.8
Sand and Gravel (River)	1,463.5	1,912.2	1,350.4	1,616.9	1,450.0 ^e
Shale	166.8	129.1	252.6	58.6	158.4
Pozzolan	102.3	132.5	194.1	286.3	170.3
Gypsum	65.8	65.6	84.5	70.5	46.3
Silica Sand	29.8	30.5	30.2	24.1	11.1
Clay	0.5	0	0	0	0

Sources: Mines and Geology Division, Jamaica Bauxite Institute and Planning Institute of Jamaica

Notes:

1 – Hard limestone crushed for aggregates (like manufactured sand and gravels) and for making of Ordinary Portland Cement. It includes some industrial-grade high purity limestone.

2 – An exceptionally pure variety of high purity limestone (i.e., food-grade type).

3 – Soft, impure variety of limestone.

e – Estimate; exact amount not available at time of reporting.

SIGNIFICANT EVENTS

The Bauxite and Alumina Sub-sector was largely impacted by hydrometeorological events in 2024. Hurricane Beryl in early July and Tropical Storm Rafael in early November prolonged and intensified the wet season which curtailed mine production volumes at WINDALCO. At JAMALCO's Rocky Point Port, the alumina conveyor was damaged during Hurricane Beryl and resulted in disruption to shipments. That company made alternative port arrangements until the infrastructure was repaired and brought back online in September 2024.

Other significant happenings in the Sub-sector included reduced bauxite consumption at WINDALCO due to emergency shutdown and repairs to their power plant. On the positive side, WINDALCO supported the enrolment of 20 Jamaican students in engineering training programs at Russian universities. At JAMALCO, 56 employees were made redundant in December 2024 as 'part of the company's effort to improve efficiency and ensure long-term sustainability'.

Production of the industrial minerals, specifically those used in construction like limestone, sand and gravel, marl and fill, including the cement-making ingredients shale, gypsum and pozzolan remained driven by the large infrastructure projects. These include the Southern Coastal Highway Improvement Project in St. Thomas, and the Montego Bay Perimeter Road Project in St. James, along with housing construction. Cement supply was generally consistent with previous years at 1.04 Mt, supplemented with 207.5 Kt of imports. Asphalt sales in 2024 slightly declined to 23.8 million litres from the 25.2 million litres in 2023. The demand for asphalt positively correlates with the demand for river stone as both commodities are inputs for road pavements, with the latter being the material of choice for high specification roadways like highways and runways.

MINERAL EXPLORATION

In 2024, the Government-funded mineral exploration program implemented by the Mines and Geology Division continued the investigations of high purity limestone and coloured gemstones. The high purity limestone deposit at Fort Charles, St. Elizabeth was investigated by drilling which facilitated the identification of an indicated resource of 33 million tonnes of good quality limestone. This limestone has potential for use as a specialty mineral in various daily-use products. Development of this resource is an investment opportunity, especially to support local manufacturing that requires calcium carbonate as an input.

The Division also completed its coloured gemstones assessment program and published its Bulletin No. 13 titled, **Jamaican Agates**. This is a comprehensive lapidary guide for developing local gemstones resources like agates, jaspers, chalcedony and quartz, whether for business or recreation and hobby.

Private mineral exploration was conducted by two companies, C3 Metals Inc and Geophysx Jamaica Limited. C3 Metals continued evaluation of its early-stage copper-gold prospects at Bellas Gate, St. Catherine and Arthurs Seat, Clarendon which included

conducting over 370 metres of diamond core drilling. The company's activities were impacted by Hurricane Beryl where their core facilities and drilling sites experienced moderate damages. At the end of 2024, C3 Metals had five exploration licences with 100% interest over 178.6 km² at Bellas Gate, Arthurs Seat and also in St. Thomas. They also had 50% interest in 98.7 km² at Main Ridge, Clarendon as part of a gold exploration joint venture with Geophysx entered in February 2024. This partnership, called the 'Super Block Project', centres around the former gold mine at Pennants, Clarendon. Geophysx, in March 2024, also entered into an agreement with a subsidiary of Barrick Gold Corporation for the latter to explore in over 4,000 km² of prospects held by Geophysx. The companies conducted regional scale geological surveys and examined specific priority areas, particularly those for exploratory drilling.

MINERAL TENEMENTS AND PERMITTING

At the end of 2024, there were 16 active mining leases, mostly for bauxite and high purity limestone, and 90 prospecting licences mainly for precious and base metals. There were also 279 licenced quarries of which 61% were for limestone, including marl, 32% for river sand and stone, and 7% for other materials like shale, pozzolan and gypsum. The total number of licenced quarries had increased from 248 at the beginning of the year. Traditionally, licences for limestone and river sand and stone dominate the number of quarries.

The primary mineral/mineral products exported in 2024 were largely bauxite and alumina, limestone (hard), whiting and calcium carbonate, and sand and stone for construction. This was the same situation in 2023.

PROJECTIONS FOR 2025

The Government of Jamaica continues to implement the actions in the country's National Minerals Policy. Diversifying the mineral portfolio and modernizing the fiscal regime for mining and quarrying are two priority areas. The development of the high purity limestone (calcium carbonate) sub-sector is being prioritized as Jamaica is a net importer of that mineral where exports value less than 60% of the imports. In addition, Jamaica's fiscal regime (taxes and royalties) for mining is being reviewed to bring it in line with modern practices where the host communities for mining, the mining company, and the country all benefit. With phased implementation of these actions, the performance of Mining and Quarrying Sector is expected to improve. However, performance in 2025 is expected to follow a similar trend as 2024.

This pamphlet is prepared by the Mines and Geology Division incorporating data from our internal repositories along with content from the Jamaica Bauxite Institute, the Planning Institute of Jamaica and publicly available documents from mining/ exploration companies operating in Jamaica.

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MINES AND GEOLOGY DIVISION

(Ministry of Agriculture, Fisheries and Mining)

✉ Hope Gardens, P.O. Box 141, Kingston 6

☎ 876-927-1936 (- 40)

🌐 www.mgd.gov.jm | commissioner@mgd.gov.jm