

Jamaica's Mining and Quarrying Sector Performance 2025

A synopsis of mineral production, use and exploration in Jamaica in 2025

GENERAL SECTOR PERFORMANCE

Traditionally, Jamaica's Mining and Quarrying Sector is dominated by the production of metallurgical-grade bauxite used for making alumina (Table 1). Industrial minerals are produced in lesser quantities. In 2025, Mining and Quarrying contributed 1.2% to Jamaica's Real Gross Domestic Product (GDP) and is the lowest performer of the Goods Producing Sectors, where Manufacturing, Agriculture and Construction lead between five to eight times. Bauxite and Alumina, however, continue to dominate traditional exports, particularly over agricultural produce. Mining contributed US\$612.3 Million in export earnings in 2025; 24% less than in 2024.

MINERAL PRODUCTION AND EXPORT

The minerals produced and exported in 2025 were the same as previous years with bauxite, alumina, limestone, and sand and gravel dominating outputs.

Bauxite and Alumina: Bauxite is the only metallic mineral mined in Jamaica and approximately 5.63 million tonnes (Mt) were produced in 2025. Crude bauxite exports of 2.01 Mt were conducted by Discovery Bauxite Partners through 49 shipments. Ore went mostly to the Atlantic Alumina refinery at Gramercy in the USA, and to China, and a small amount to Senegal. That bauxite retained locally was refined to alumina at the JAMALCO and WINDALCO (Ewarton) alumina plants. Together, these two companies dispatched 57 shipments totalling 1.38 Mt of alumina to various global destinations.

JAMALCO accounted for 77% of the exports with 35 shipments of smelter-grade alumina which is reduced to aluminium in smelters. Between the companies the largest quantities of alumina were exported to USA (39%), Russia (22%), Iceland (13%) and Netherlands (9%), and less to Canada and France, mostly to smelters. Of the alumina shipments, 11 vessels bearing approximately 91,300 tonnes of alumina hydrate from WINDALCO went mostly to the USA and delivered a small amount to Panama. Hydrate is a specialty alumina used for non-metallurgical purposes.

Limestone: This commodity is largely consumed in the Construction Sector where it is crushed to make aggregate and as a main pyro-processing input for making cement and industrial lime. Some crushed limestone of high purity is used as calcium carbonate for the manufacture of paints, plastics, animal feed and soaps. Marl and Fill is a low-value bulk construction material used mostly in large infrastructure projects.

In 2025, 3.323 Mt of limestone were produced and approximately 486,000 tonnes or 15% of this were exported through 19 shipments. Some 113 tonnes were dispatched from the Port of Kingston as bagged calcium carbonate to supply manufacturing in the eastern Caribbean. The rest went mostly to the USA, and smaller quantities to Bermuda, Bahamas and the US Virgin Islands. Approximately 66% of exports were dispatched from the multi-use Ocho Rios Port.

Table 1. Production of Minerals in Jamaica, 2021 - 2025 ('000 tonnes)

Commodity	2021	2022	2023	2024	2025
Bauxite	5,949.6	4,364.7	5,988.1	5,888.9	5,630.2
Alumina	1,158.5	634.1	1,400.8	1,481.2	1,316.2
⁽¹⁾ Limestone (Hard)	2,858.9	2,291.5	1,898.2	2,194.1	^(e) 2,693.0
⁽²⁾ Limestone (Whiting)	144.9	125.1	245.1	163.5	^(e) 150.0
⁽³⁾ Marl and Fill	505.2	443.7	595.4	742.8	^(e) 480.0
Sand and Gravel (River)	1,912.2	1,350.4	1,616.9	^(r) 1,850	2,517.1
Shale	129.1	252.6	58.6	158.4	247.4
Pozzolan	132.5	194.1	286.3	170.3	145.3
Gypsum	65.6	84.5	70.5	46.3	65.6
Silica Sand	30.5	30.2	24.1	11.1	106.0
Clay	0.5	0	0	0	-

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

Notes:

(1) – Limestone crushed for aggregates and for making cement. It includes some industrial-grade high purity limestone.

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

(3) – Mostly soft, impure, chalky variety of limestone.

(e) – Estimated; (r) – Revised

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Sand and Gravel (River): Over 2.5 Mt of this construction material were produced in 2025. Two shipments were made containing 14,000 tonnes exported to Guyana and 400 tonnes to the US Virgin Islands.

Other Minerals: Apart from limestone, cement raw materials accounted for the bulk of other minerals produced. Local limestone and shale were used to prepare approximately 630,400 tonnes of clinker in 2025. Approximately 863,750 tonnes of cement were further made by combining clinker with pozzolan and gypsum. Despite a cement supply of 1.04 Mt, Jamaica in 2025, the country imported 303,000 tonnes.

SIGNIFICANT EVENTS

Large infrastructure developments such as the Port Antonio Bypass Project which started in June 2025 and the Montego Bay Perimeter Road Project which started earlier, all drive the demand for industrial minerals especially limestone and cement.

The Mining and Quarrying Sector experienced a \$40 Billion loss due to the passage of Hurricane Melissa in late October 2025. Bauxite and alumina production declined as some operations suffered damage and loss of power. Some industrial minerals operation, particularly in western Jamaica, had badly damaged infrastructure. Metallic mineral exploration in central Jamaica was also hampered due to damages to drill pad sites and access roads.

MINERAL EXPLORATION

In 2025, mineral exploration was conducted by two junior exploration companies, the Canadian-based, C3 Metals Inc. and the Jamaican-based, Geophysx Jamaica Limited.

C3 Metals had five licences to explore for copper and gold in over 17,855 hectares at Bellas Gate (St. Catherine), Arthurs Seat (Clarendon) and at Hungry Gully (St. Thomas). The company also has 50% interest in 9,870 hectares at Main Ridge (Clarendon) as part of a gold exploration project with Geophysx Jamaica Ltd, which the companies agreed to in February 2024. In February 2025, C3 Metals announced that it had entered an agreement with Freeport-McMoRan Exploration Corporation, a subsidiary of the American, Freeport-McMoRan Inc. to finance the exploration activities at Bellas Gate/Arthurs Seat where C3 Metals has exploratory rights to over 13,020 hectares.

For the Bellas Gate copper-gold project, C3 Metals announced mid-year that it had started drilling, with plans to bore nine diamond core holes totalling over 2,750 metres. A three-dimensional electrical geophysical survey, an advanced sub-surface mapping technique, was also conducted over 80 km² at the Bellas Gate district to

characterize the deep-seated copper-gold occurrences previously identified from drilling work. The company also confirmed finding gold in test holes drilled at Main Ridge near the former AUSJAM gold mine. No work was reported for the Hungry Gully prospect where copper is the metal of interest.

Geophysx Jamaica Ltd remains the largest holder of mineral tenement in Jamaica. The company has approximately 400,000 hectares of exploration licenses. Apart from the 'Super Block' partnership with C3 Metals Inc., the company conducts exploration with Barrick Gold (International Holdings) Ltd, a subsidiary of Barrick Gold Corporation.

MINERAL TENEMENTS

At the end of 2025, there were 18 active mining leases, mostly for bauxite and high purity limestone, and 91 exclusive prospecting licences mainly for precious and base metals. There were also 204 licenced quarries of which 65% worked limestone, including marl, 27% for sand and gravel, and 8% for other materials like shale, pozzolan and gypsum. The total number of licenced quarries had decreased from 279 in 2024 due to inactivity or closure. Traditionally, licences for limestone and river materials dominate in number. In 2025, the parishes with the most operations were St. Thomas (13%), St. Catherine (12%), St. Elizabeth (11%) and Clarendon (10%). As a function of geology, St. Thomas has the most river mining activities, and St. Elizabeth and St. Catherine, has the most limestone quarries.

PROJECTIONS FOR 2026

The performance of the Mining and Quarrying Sector in 2025 continued in that trend from 2024 which shows its continued sensitivity to changes in the operational environment, whether the global market forces, or natural disasters. For 2026, the performance is expected to continue along the same trend as previous years as the general operational environment, including those global forces have not significantly changed.

The Government of Jamaica is also re-examining the institutional arrangement for mining through deliberations to either modernize the Mines and Geology Division, or to establish a general Minerals Institute by merging the Geological Survey research function and the Jamaica Bauxite Institute. It is expected that the changes will help the Sector adapt for the future and improve overall performance.

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