MINISTRY OF AGRICULTURE
FISHERIES & MINING

2025 Year in Review

Farmgate Market Prices

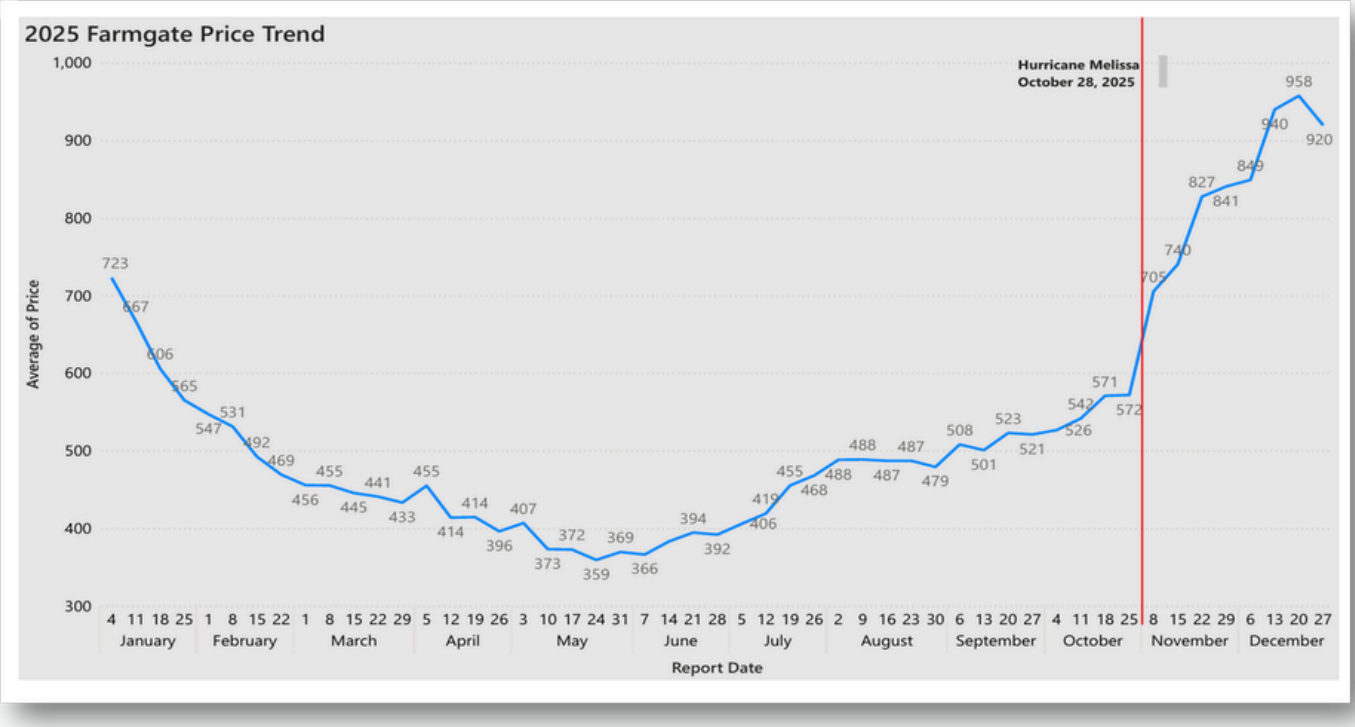
Introduction

The year 2025 was marked by record-breaking weather patterns that exacerbated supply and demand dynamics in the agricultural produce market. This 'Year-in-Review' report highlights and analyses the annual price trend across commodity groups, identifying the commodities that experienced the most shocks, and providing a clear snapshot of the pricing behaviour throughout the 12-month period.

Furthermore, this report specifically examines farmgate prices, evaluates seasonal trends and weather patterns for the year. It will also provide an overview of weekly and monthly fluctuations.

In addition to descriptive trends, the report incorporates analytical interpretation, using the Coefficient of Variation (CV) as a metric for broader evaluation. Finally, the report will conclude with a summary of current trends in 2026 and brief outlook for the remainder of the year.

2025 Farmgate Price Trend



Farmgate prices in 2025 experienced an overall increase of 27%. Prices started at a significantly elevated level in January 2025, with an average of J$723/kg per commodity before entering a steep and consistent decline through to June. During the months of March and April, the market stabilised with prices averaging in the mid J$400/kg, indicating that farm output and supply situations had regained some normalcy. This downward trend suggests that competition was healthy, and there were no major disruptions influencing price movements during this period.

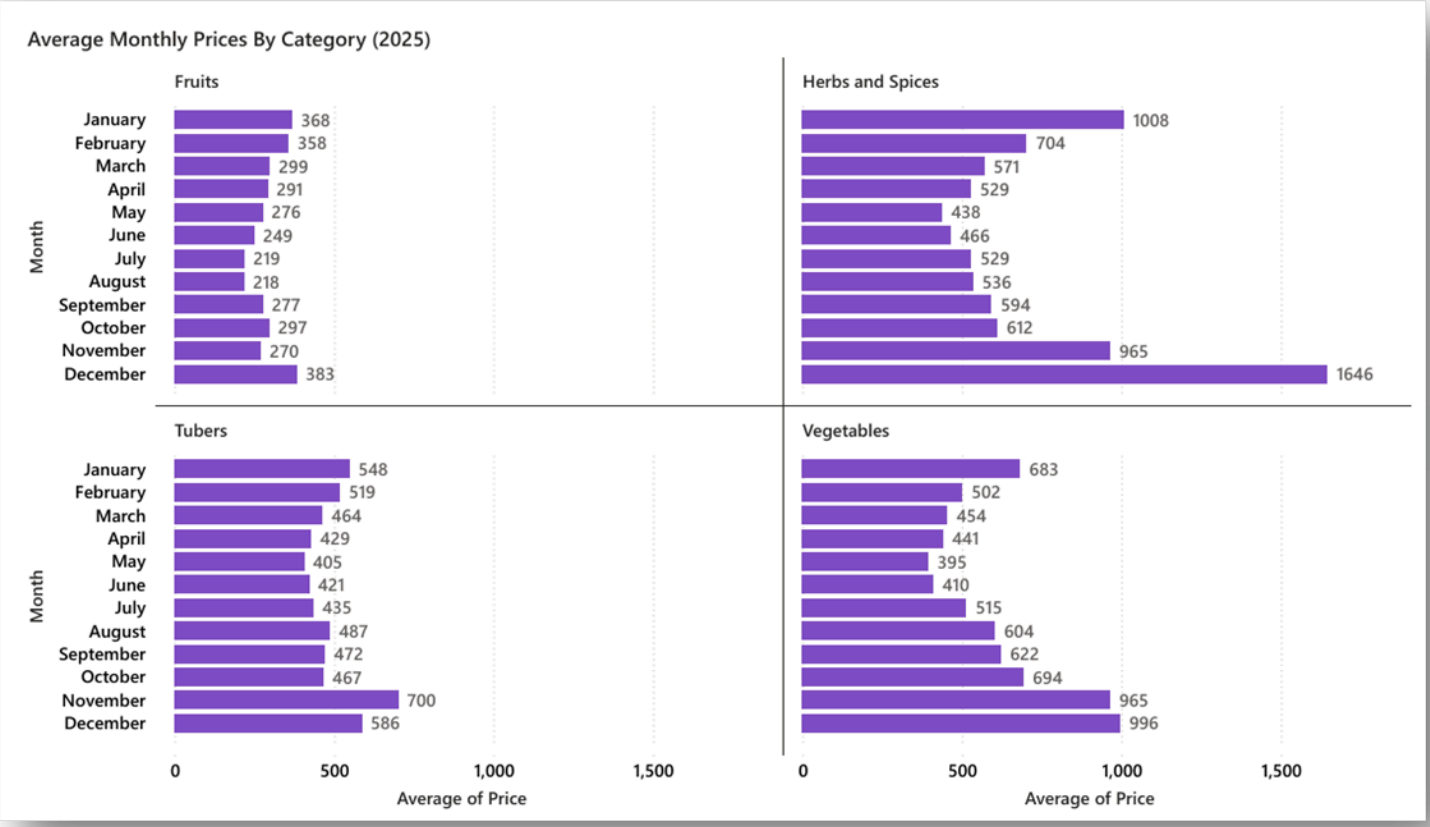
During the period May to September, the market transitioned into a period of stability, prices initially reached their lowest point in May (J$359/kg), signalling strong mid-year inflow typical of the production cycle.

However, beginning in July, the trend reversed, and prices began to gradually increase. The values moved steadily from the upper J$300s/kg into the J$500s/kg range by late September. The shape of the curve in this period reflects a market that showed signs of vulnerability as it entered the latter part of the year.

The most dramatic change occurred after Hurricane Melissa on October 28, 2025, marking a major disruption in the entire price series. Prior to the storm, prices were averaging J$572/kg, but immediately afterward, the trend showed a sharp surge. Prices spiked by 23% to J$704/kg during the first week after Hurricane Melissa, then 19% to J$841/kg, peaking at J$958 (14%) before a slight 4% decline to J$920/kg towards the end of December.

This sudden elevation reflected severe supply shocks as farms experienced damage and yield losses, transportation networks were disrupted, and fewer producers entered key markets due to access challenges. The persistence of high prices going into December suggests that market recovery was hindered by the time required for producers to re-establish the flow of supplies. In conclusion, the price trend is descriptive of an agricultural market that was largely predictable for most of the year, however the hurricane introduced a structural break, reshaping market behaviour for subsequent weeks.

Categorical Breakdown



With the exception of the fruit category, the monthly average price patterns across commodity categories reveal distinct seasonal and disaster-related changes throughout 2025. Each category developed its own unique trend, but a similar pattern is evident; prices dip in the second quarter and increased in the final quarter.

Fruit prices began the year at relatively high levels, reflecting the lingering effects of Hurricane Beryl and the festive season. However, prices progressively declined throughout summer reaching its lowest point of J$218/kg in August.

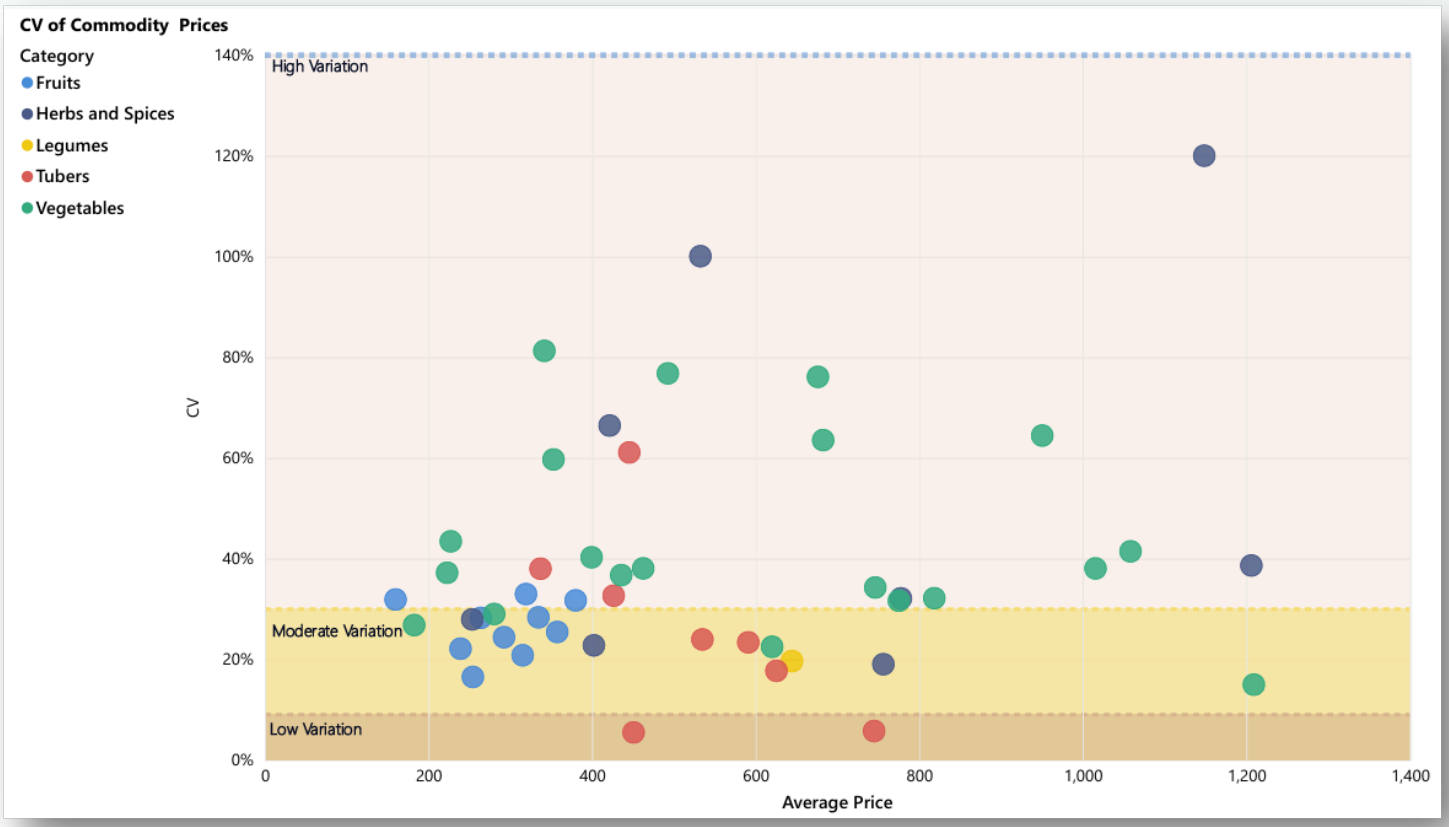
Then, prices began to rise in September peaking in December at J$383/kg (38%). In contrast, Herbs and Spices showed the strongest and most erratic pricing behaviour of all categories. Prices started the year elevated at J$1,008/kg in January, after which a moderate decline followed between February and June, with prices decreasing to J$438/kg (57%) in May. However, from July onwards, this commodity group exhibited sustained increases, culminating in a high of J$1,646/kg (276%) in December.

Tubers demonstrated a steadier pattern but still recorded cyclical behaviour. Prices averaged J$548/kg in January, then reducing through the first half of the year to reach a mid-year low of J$405/kg (26%) in May, before increasing going into the third quarter. The most pronounced movements occurred towards the end of the year; following relatively stable prices in September (J$472/kg), after which a 48% increase to J$700/kg in November was recorded, before closing with a 19% reduction at J$586/kg in December.

Finally, the vegetable category closely mirrored the overall farmgate trend with prices starting at J$683/kg in January, then stabilising in April at J$395/kg (42%), and maintaining its moderate price level throughout the mid-year months. However, beginning in August (J$515/kg) and continuing through to September and October, vegetables entered a period of intense upward surge. Again, the most dramatic movements occurred after Hurricane Melissa, with prices moving from J$622/kg in September to J$694/kg (11%) in October and to J$965/kg (61%) in November before a slight 3% increase to J$996/kg in December.

Price Stability Analysis

The coefficient of variation (CV) is the metric used to measure the dispersion of prices around their mean, capturing the stability and volatility of commodity prices throughout the year. This provides insight into the level of risk or sensitivity associated with each commodity group as we reflect on the year's events.



At farmgate, 60% of commodities surveyed exhibited high instability, surpassing the 30% threshold (see volatility heat map), in other words, prices were fluctuating an estimate of more than 30% above or below their average prices. These results underscore the severity of the impact external market conditions, coupled with the usual seasonality (ie. Prices are typically higher in the 4th quarter) had on the prices.

Examining the movements by category, it is observed that vegetables, (represented by green dots), were the most sensitive commodity group.

Approximately 84% of vegetable commodities exhibited high levels of instability with CV values ranging from 32% to a high of 81%. Additionally, 15% of vegetable commodities namely, callaloo, cucumber, and cauliflower experienced moderate price fluctuations with volatility levels ranging from 23% to 29%. One commodity, broccoli, fell within low volatility threshold recording 15% implying that it maintains relative stability even in periods of uncertainty.

Among the highly volatile vegetables, Plummy tomato recorded 81% reflecting the highest level of instability, followed by Salad Tomato (77%), Green Sweet Peppers (76%), Green Cabbage (60%), Iceberg Lettuce (64%). Historically, these commodities have demonstrated sensitivity to rainfall and adverse weather conditions, consistent with similar patterns observed in 2024 after Hurricane Beryl, however, the severity of Hurricane Melissa amplified the price behaviour. Importantly, this recurring trend hints towards a predictable vulnerability that can offer valuable information for planning and mitigation strategies prior and post weather disruptions.

Fruits generally displayed moderately varied levels of price fluctuations, with three commodities, Honeydew Melon (33%), Green Banana (32%), Watermelon (32%) showing high price volatility, each exceeding the 30% threshold. These results reflect persistent patterns; a similar occurrence was recorded last year for Banana production where farms were severely impacted by weather disruptions inducing shortages and upward pressure on prices.

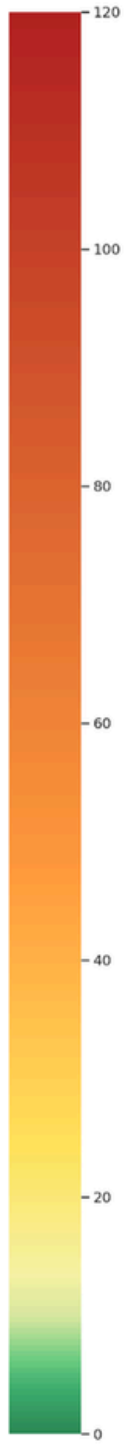
With respect to tubers, this commodity group had commodities varying across all three levels of measurement. Irish Potato (61%), Dasheen (33%) and Sweet Potato (38%) fell within the high volatility range, however, the high volatility for Dasheen and Irish Potato requires a critical caveat. Both commodities recorded over 200% price differences between, October 25th and November 15th. The week of November 15th, was the main driver for the high CV result, reflecting an opportunistic pricing behaviour among the limited producers who were present to supply commodities immediately after the shock.

In other words, temporary suppression of competition and the widespread knowledge of scarcity, resulted in temporary inflation of prices far beyond the usual expectation. A similar pattern was observed at Coronation Market but as the competitive environment normalised, prices were still elevated but increases were a bit more tempered. To better reflect the underlying volatility, a trimmed CV was calculated; adjusted to account for the extremities of that one week. Therefore, we would see Dasheen prices fluctuating 13% exhibiting low volatile behaviour, and Irish Potato 23% (Moderate). This confirms that their high CV values for these commodities were not due to sustained instability, but rather short-lived post disaster reactions.

Finally, Herbs and Spices recorded the highest levels of price volatility. Scotch Bonnet Pepper record a 120% instability, West Indian Red Pepper 100% driven by sustained price movements of +100% to +650%. Other highly unstable prices were recorded for Scallion (60%), Thyme (39%), and Sorrel (32%). Moderately volatile commodities included Turmeric (28%) and Onion (23% while Ginger (19%) was relatively stable.

Price Volatility Heat Map

01	Pepper (Scotch Bonnet) 120%	Carrot 40%	Watermelon 32%	Onion 23%
02	Pepper (West Indian Red) 100%	Sweet Pepper (Red): Local 32%	Sorrel 32%	Irish Potato 23%
03	Tomato (Plummy) 81%	Sweet Pepper (Yellow): Local 32%	Cucumber 29%	Plantain (Green) 22%
04	Tomato (Salad) 77%	Green Banana 32%	Pineapple (Cow Boy) 28%	Papaya 21%
05	Sweet Pepper (Green): Local 76%	Thyme 39%	Pineapple (MD2) 28%	Gungo Peas (Green) 20%
06	Sweet Pepper (Green): Green House (Local) 64%	String Bean 38%	Turmeric 28%	Ginger 19%
07	Lettuce (Iceberg) 64%	Sweet Potato 38%	Callaloo (Whole) 27%	Yam: White (Lucea) 18%
08	Cabbage (Green) 60%	Sweet Pepper (Yellow):Green House (Local) 38%	Cantaloupe 25%	Plantain (Ripe) 17%
09	Escallion 66%	Okra 37%	Pineapple (Sugar Loaf) 24%	Broccoli 15%
10	Cabbage (Green) 60%	Pumpkin 37%	Yam (Negro) 24%	Dasheen 13%
11	Pak Choi 43%	Lettuce: Romaine (Local) 34%	Yam (Yellow) 23%	Coco 6%
12	Sweet Pepper (Red): Green House (Local) 41%	Honeydew Melon 33%	Cauliflower 23%	Yam (Sweet) 6%



Price Volatility Index

- Low Volatility – 0 – 10%
- Moderate Volatility – 11-30%
- High Volatility - Exceeding 30%

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Current Trends & Outlook

Currently, Jamaica's agricultural sector is in a state of recovery following the severe impact of last year's events, which resulted in an estimated J$30 billion in agricultural losses. Present market patterns indicate that prices have begun to normalise, particularly for vegetables. January 2026 price data shows that the cost of essential produce are returning to below crisis levels and in most cases are far more affordable than January 2025 prices.

Key commodities realising this change include Romaine Lettuce (69%), Cabbage (60%), Whole Callaloo (60%), Cucumber (55%), Carrot (50%), Scallion (50%), String Bean (50%), Pak Choi (47%), Negro Yam (45%), Iceberg lettuce (43%). This trend suggests that some commodities specifically leafy vegetables are re-emerging faster than other commodity groups due to their shorter production cycles and the re-entry of farmers into the marketplace.

Scotch Bonnet Pepper (174%), West Indian Red (110%), and Plummy Tomato (67%) though yielding exorbitant increases when compared to January 2025 have made significant, adjustments since the beginning of February. As of February 7, 2026, in some parishes, Scotch Bonnet Peppers has hit a low price of J$440/kg, West Indian Red Peppers J$275/kg and Plummy Tomato J$88/kg.

While this may not be the general pricing for most locations, it is a sign of positive market activity; with conditions remaining the same, the expectation is that these commodities will continue to make further recovery throughout the end of the quarter.

As the sector moves further into 2026, the current trajectory of market dynamics sets the stage for the return of normal seasonal patterns going into the second quarter and beyond, provided weather conditions are favourable and production progresses smoothly. Furthermore, with the investments made towards developing the sector with an emphasis on sustainability and efficiency through the inclusion of cold storage and agro-processing facilities, namely Essex Valley Cold Storage and Agro-processing Facilities, among others to come. It's likely that improvements in quality produce and value-chain efficiency will be observed over time.