



# National Green Export Review of Oman: Tourism, Dates and Fish

# OMAN



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**UNCTAD/DITC/TED/2018/13**

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## Acronyms and abbreviations

GCC	Gulf Cooperation Council
GDP	Gross Domestic Product
GSO	Gulf Cooperation Council Standard Organization
IUU	Illegal, Unreported and Unregulated
MENA	Middle East and North Africa
MOT	Ministry of Tourism
NCSI	National Centre of Statistics and Information
NGER	National Green Export Review
OTS	Oman Tourism Strategy
RO	Omani Rial
SITC	Standard International Trade Classification
WTTC	World Travel and Tourism Council

## Acknowledgements

The National Green Expert Review (NGER) project of Oman was undertaken through cooperation and between Oman's Ministry of Commerce and Industry (MOCI) and the United Nations Conference on Trade and Development (UNCTAD). This NGER report was prepared by the project's national team of experts, whose members included Mr. Omar Al-Jabri, Sultan Qaboos University; Mr. Hussein Al-Muscati, Ministry of Agriculture and Fisheries; and Ms. Amira Iqbal Al Lawati, Ministry of Tourism. Communications, organizational and logistics support was provided by Mr. Mohammed Al Mardouf Al Saadi and Mr. Khalfan Al-Rahbi of the Ministry of Commerce and Industry, and by Ms. Hilda Al-Hinai and Mr. Mohammed Al Balushi of the Permanent Mission of the Sultanate of Oman to the United Nations Office in Geneva.

Technical support was provided by UNCTAD staff members including Mr Robert Hamwey and Mr Malick Kane of the Trade, Environment, Climate Change and Sustainable Development Branch, Division on International Trade and Commodities. Desktop formatting was done by Mr Rafe Dent.

Financial support for the project was provided by the United Nations Development Account (project 1415L) and by UNCTAD.

*21 November 2018*

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## EXECUTIVE SUMMARY AND INTRODUCTION

### Country profile

Economic diversification and sustainable growth are among the key priorities of Oman's national development strategy. Diversification efforts lead to a progressive growth of non-crude oil exports<sup>1</sup> which raised from 8 per cent to 38 per cent of the total merchandise export from the Sultanate from 1990 to 2016.<sup>2</sup>

Oman's Ninth Five-Year Development Plan, which sets out Oman's economic development priorities between 2016 and 2020 identifies manufacturing, tourism and fisheries as priority sectors to promote economic diversification. The plan also highlights the necessity of increasing the share of non-oil exports as well as the importance of attracting foreign direct investment.

### The Oman National Green Export Review

The Oman National Green Export Review (NGER) was initiated in 2015 by Oman's Ministry of Commerce and UNCTAD with the aim of supporting the emergence of green production and export sectors, in line with the Sultanate's sustainable development framework.

An initial analysis of Oman's trade data conducted by UNCTAD using the Green Product Space methodology<sup>3</sup> was used to identify highly competitive green products for which Oman has a revealed comparative advantage in production and export. As a result, tourism, fisheries and palm date products were identified as promising green sectors with strong potential in terms of employment creation and sustainable use of environmental resources. The conclusions from the green product space analysis were later discussed during a first national workshop, held in 2016 and bringing together representatives from government, private sector and academia. At this occasion, national stakeholders validated the selection of tourism, fisheries and palm date products as priority sectors for the NGER and gave mandate to the project team to focus on their linkages. The three priority sectors and their linkages were later analyzed by a team of national experts whose findings were validated during a second national stakeholder workshop in 2017. Based on consultations with national stakeholders and on the conclusions from the second national workshop, an action plan to promote a mutually supportive development of green tourism, fisheries and palm date sectors was prepared for consideration by national authorities. The action plan along with the main findings from the national experts are presented in this report.

### Overview of the Omani tourism, fish and dates sectors

Oman is famous for its ancient culture and hospitality, offering diverse experiences to visitors. It is blessed with a unique topography and history, from its ancient maritime trade to endless clean beaches, and its wadis with their own ancient unique farming methods. The overall picture is promising: Oman offers very diverse experiences from its natural and cultural heritage that include a long coastline of 3,165 km, a rich marine life that attracts divers from all over the world, villages and valleys, forts and castles, traditional agricultural communities. Five cultural Omani sites are recorded in the UNESCO World Heritage List: Five Aflaj, Bahla Fort and Wall, Bat Tombs and Settlement, Ancient City of Qalhat and the Frankincense Route.

All these assets combined with significant investments from the Omani government lead to a rapid growth of the tourism sector fuelled by visitors from Asia (Gulf countries, India, Pakistan and Philippines) and Europe (United Kingdom of Great Britain and Northern Ireland, Germany). According to Oman's National Centre of Statistics and Information (NSCI) the number of tourists to Oman grew from less than 1,400,000 in 2011 to more than 3,200,000 in 2017<sup>4</sup> and the contribution of the tourism and travel industry to the Omani Gross Domestic Product (GDP) is expected to reach US\$ 8.67 billion by 2028.<sup>5</sup>

Oman's long coastline is not only a touristic asset. It also provides local communities with a vibrant fishing industry. The country is the one of the largest suppliers of fish in the Gulf Cooperation Council (GCC) region and is a net exporter of fish and fish products. In 2016 Oman's total fish catch exceeded 270,000

tons for a total estimated value of RO 204,000,000 (approximately US\$ 675,000,000) and the Omani fisheries generated more than US\$ 170,000,000 of export revenues.<sup>6</sup>

Consultations and studies conducted in the framework of the Oman NGER highlighted the mutually supportive relationship between sustainable fisheries and green tourism. They pointed out in particular how fishing communities could contribute to develop tourism and how tourism could contribute to promote Omani fish and fish products.

Similar conclusions were drawn regarding the palm date sector and its linkages with the tourism industry. Oman is currently the ninth largest palm dates producer in the world and palm date products play a central role in the country's culture, handicraft and agriculture. Palm dates constitutes 80 per cent of all fruit crop production in Oman and occupies 50 per cent of its total agricultural area. In addition, while available estimates indicate that only 2.6 per cent of the total Omani date production is exported, Omani dates generated US\$ 11,000,000 of export revenues in 2016.<sup>7</sup> Beside its cultural and economic importance, palm date cultivation can contribute to environmental protection and desertification control (Arias, Hodder and Oihabi 2016). Among others, NGER consultations pointed out the potential of date farm visits and traditional handicraft for the development of agritourism.

As a result of the Oman NGER, the following action plan was prepared by a multidisciplinary team of national experts for further consideration by the Omani government. It aims to foster linkages between tourism, fish and palm date sectors, using tourism as a transversal activity to promote green export. The plan revolves around three strategic areas which are summarized below:

- ◇ Promoting agritourism through the identification of pilot sites, the organization of farm visits, the development of cultural activities in relation with farming communities (including sales and demonstrations centered around traditional handicraft).
- ◇ Integrating tourism activities in fishermen's villages via the development of sea trip on traditional boats, whale and dolphin watching and visits to fish markets.
- ◇ Developing cross sectoral linkages and cooperation by establishing a multisectoral, public private collaboration platform and providing technical assistance to farmers and fishermen to supply local hotels and develop touristic activities.

A detailed version of the above action plan along with an analysis of the linkages between tourism, fisheries and palm date sectors will be presented in this publication.

## SECTION 1. THE TOURISM SECTOR IN OMAN

Tourism is a strategic sector in Oman's economic diversification efforts. Along with manufacturing, transport and logistic services, fisheries and mining, it is part of the five priority sectors identified in the Sultanate's Ninth Five-Year Development Plan and is expected to receive a total of RO 1.6 billion (approximately US\$ 4.1 billion) of public and private investments between 2016 and 2020.<sup>8</sup>

### 1.1 Key figures

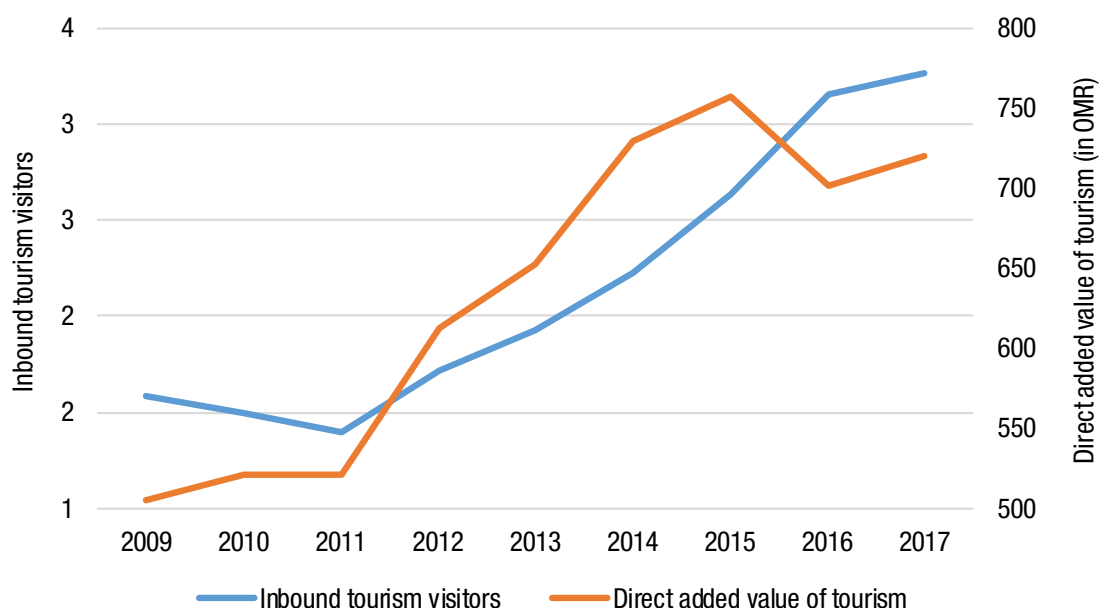
The Omani tourism sector is growing rapidly and is playing an increasing importance in the economy. The estimated contribution of tourism to the Omani GDP reached 2.8 per cent in 2016 and the direct added value generated by Omani tourism rose from RO 505 million (approximately US\$ 1.3 billion) in 2009 to RO 719 million in 2017<sup>9</sup> (approximately US\$ 1.8 billion), making tourism one of the fastest growing non-oil industries of the Sultanate. Moreover, tourism and travel directly support a total of 72,500 jobs (3.4 per cent of the total national workforce) and this figure

is expected to rise by 2.6 per cent by 2028 (WTTC, 2018). According to the World Travel and Tourism Council estimates, Oman's travel and tourism sector will record one of the strongest growth in the world (18<sup>th</sup> rank out of 185 countries) between 2018 and 2028 (WTTC, 2018).

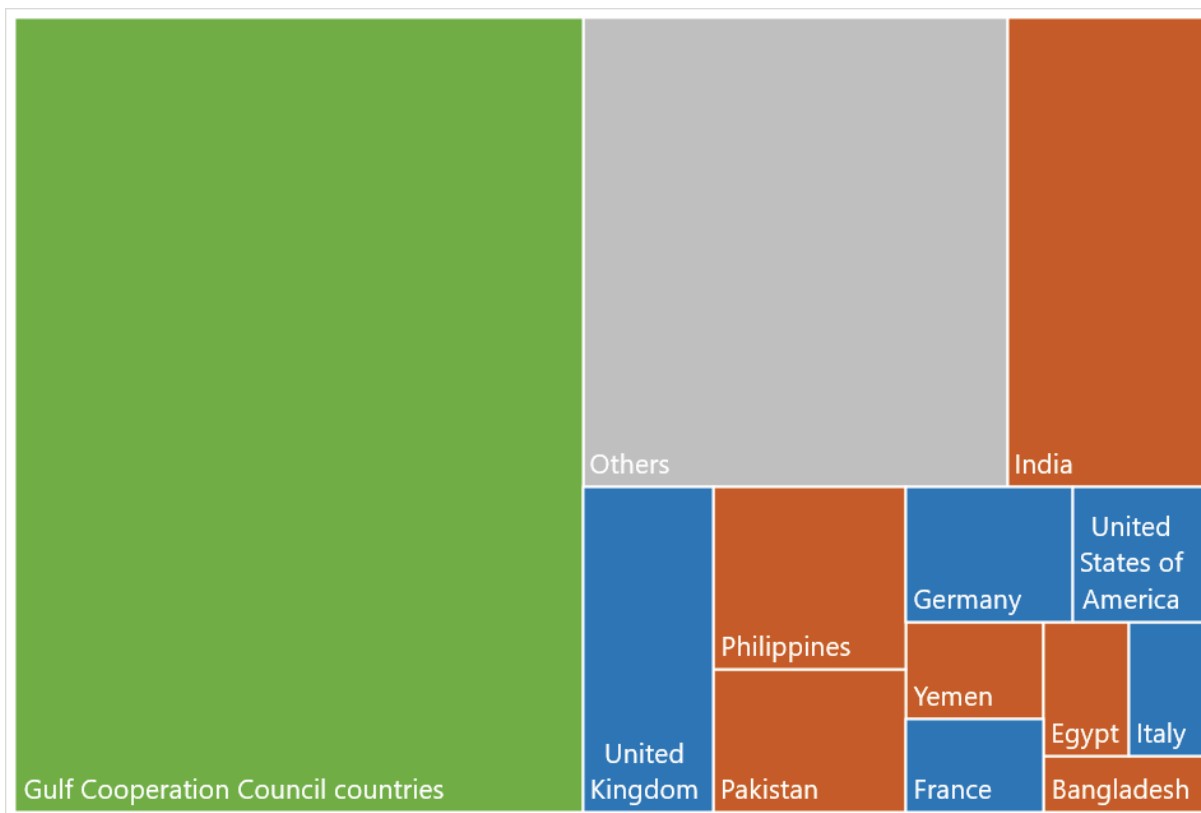
As shown in figure 1, the number of inbound tourism visitors in Oman has grown steadily since 2012, exceeding 3,000,000 in 2017. This growth is coupled with a decrease of the average expenditure per tourist which declined by 14 per cent between 2013 and 2018.<sup>10</sup>

Citizens from Gulf Cooperation Council (GCC) countries, including Omanis residing outside of the Sultanate, represented 48 per cent of the tourists visiting Oman in 2016. Visitors from other Asian countries such as India, Pakistan and Philippines accounted for another 17 per cent of the total number of tourists in the Sultanate. In addition to tourists from Asia, Oman is attracting an increasing number of visitors from the United Kingdom and Germany. According to estimations communicated by the Ministry of Tourism, citizens from these two countries will represent close to 7.5 per cent of the tourists visiting Oman in 2017. Figure 2 illustrates the repartition of tourists to Oman by country of origin in 2016.

**Figure 1: Inbound tourism visitors and direct added value of tourism in Oman**



Source: National Center for Statistics and Information of Oman

**Figure 2: Countries of origin of tourism in Oman, 2016<sup>a</sup>**

Source: Ministry of Tourism, Sultanate of Oman. Tourism statistics available at: <https://omantourism.gov.om/> (accessed 28 August 2018).

<sup>a</sup> Based on estimates.

## 1.2 Oman's tourism strategy

The Oman Tourism Strategy (2016–2040) was developed by the Ministry of Tourism “to diversify the Oman economy and create jobs by offering world enriching tourism experiences with Omani personality.” Launched in 2016, it aims for Oman to become a top destination for vacations, discovery and meetings by 2040, attracting more than 11 million tourists, including 5 million international tourists and raising the sector's contribution to GDP to 6 per cent by 2040.

The OTS aims to make Oman a sustainable tourism destination and emphasises 3 guiding principles, namely:

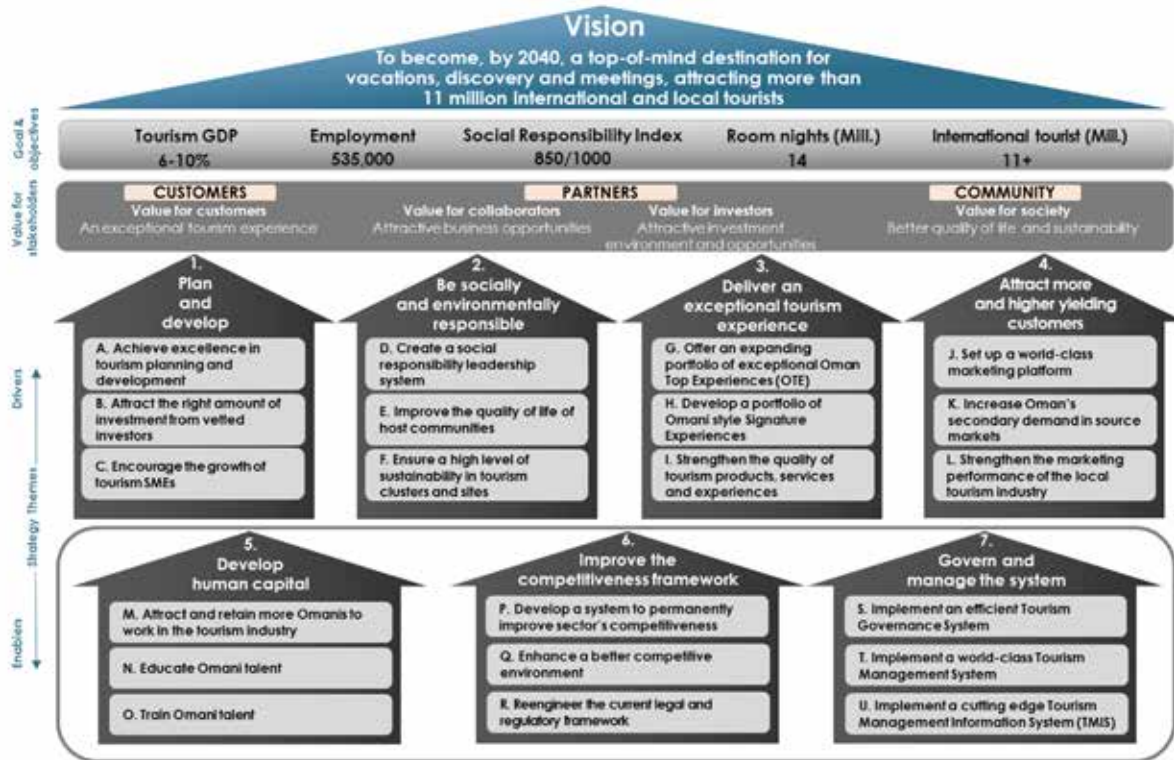
- Cultivating the Omani culture heritage and traditions;
- Preserving the natural resources and ensuring sustainability;

- Providing memorable authentic experiences to the visitors of Oman while improving the quality of life of the Omani people.

As reflected in the strategy map (figure 3), social and environmental responsibility is one the key drivers of the OTS. The strategy also identifies a number of “top experiences to establish the foundation of Oman's positioning as a tourism destination”. Several of the top experiences identified in the OTS are closely linked to date and fishery sectors and illustrate the synergies between these sectors and the tourism industry. Top experiences related to fisheries and date plantations include: trips on traditional boats, visits to traditional Omani villages, turtle watching, visit to date plantations and activities around date products.



Figure 3: Oman Tourism Strategy map, 2016–2040



Source: Ministry of Tourism (2015). Tourism development plan and execution program: Executive summary, Oman Tourism Strategy (OTS)

## SECTION 2. THE DATE SECTOR

### 2.1 Date production

The date palm (*Phoenix Dactylifera*) is one of the oldest trees cultivated in the Middle East and North Africa (MENA) region and it provides highly nutritious food, pharmaceutical products, shelter, timber products and more. In Oman, it is the main agricultural crop and it is an integral part of the culture and diet tradition of the Omani people. This tree tolerates high temperatures, drought and salinity. Its cultivation can contribute to environmental protection and desertification control (Arias, Hodder and Oihabi, 2016). In addition to these environmental benefits, *“the date industry is labour intensive and contributes to job creation and income generation” in rural areas. Date cultivation (particularly the propagation phase), packaging and marketing, in particular, are considered to offer employment opportunities for women*” (Op. cit).

According to the FAO (2018), about 85 per cent of world date production takes place in the MENA region and the five biggest producing countries total not less than 65 per cent of world production. Between 2010 and 2016, production has increased by 12 per cent (around 934,000 tons in total). As shown in the following graph, the Gulf region concentrates 5 of the 10 largest world producers of dates.

Dates represent 80 per cent of all fruit crop production in Oman and occupy 50 per cent of the total agricultural

area in the country. In 2015 and 2016, Oman was the ninth world producer of dates with a production close to 350,000 tons in 2016.<sup>11</sup>

Seven million date palm trees are cultivated in Oman comprised of 250 cultivars. However, around 75 per cent of the total date production is harvested from only 10 cultivars. Human consumption and animal feed respectively account for 51 per cent and 22 per cent of the total production. Dates are consumed mainly fresh (known as Rutab); however, many other by-products exist such as date syrup and date sugar.

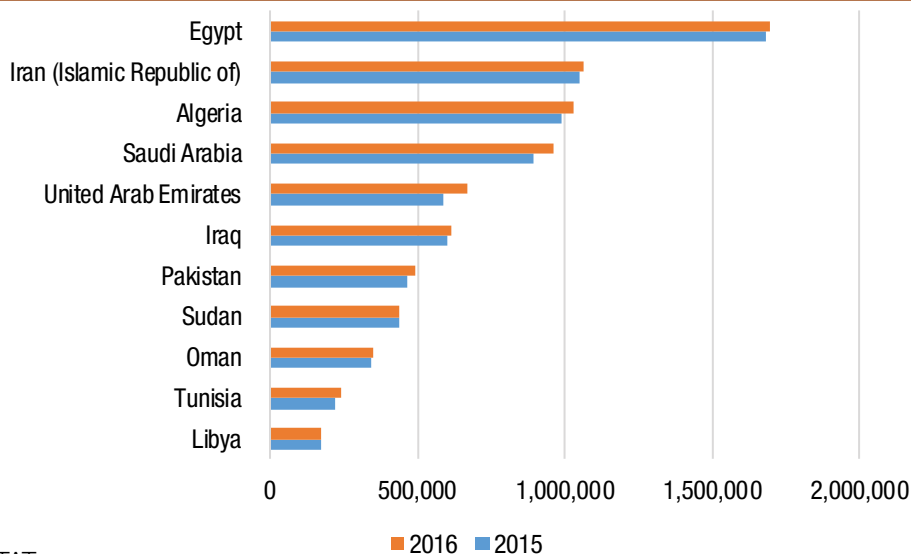
The northern region of al Batinah has the largest number of date palm trees in the country, totaling approximately 3.3 million trees out of 7.8 million grown throughout the Sultanate.

Even though dates are a major crop for Oman, their cultivation only makes a low contribution in terms of employment and agricultural GDP. A reduction of the share of unused dates could increase the economic and social benefits of the sector.

### 2.2 Oman in the world date market

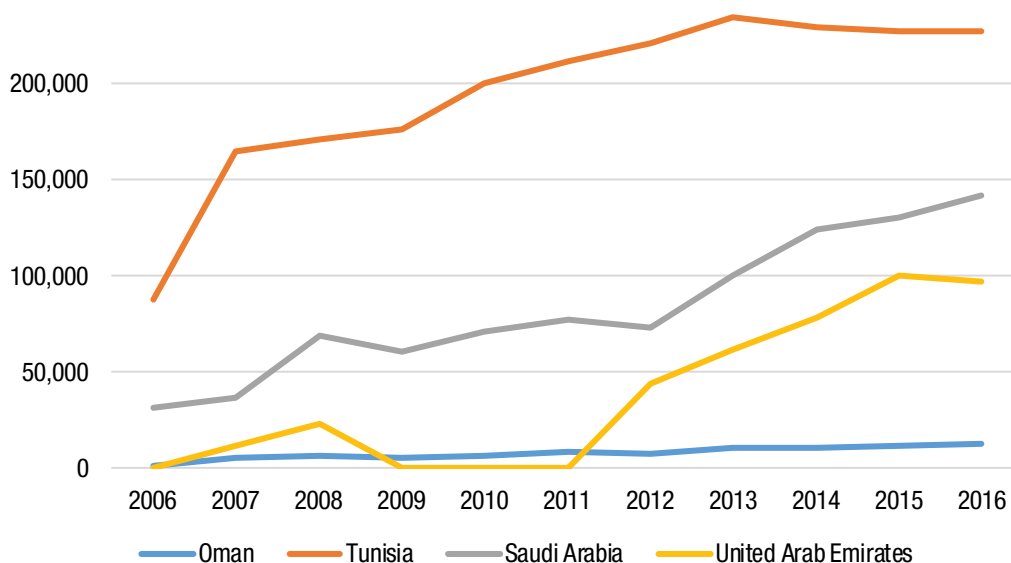
Available literature reveals that not less than 85 per cent of date production is consumed locally with only a few countries such as Tunisia and Israel specializing in export. In 2016, global date exports amounted to US\$ 1 billion and Oman’s date exports reached US\$ 12.6 million. In a growing international market, Oman’s export remained relatively stable between 2006 and 2016 as shown in figure 5.

Figure 4: Major date producing countries, 2015–2016



Source: FAO STAT

**Figure 5: Date exports from Oman and other major exporters**



Source: UN COMTRADE

Less than 5 per cent of the Omani production is exported.<sup>12</sup> Main limitations hindering the growth of Oman’s date exports include low export business capabilities and low-quality products, especially in regard with relatively high-quality requirements from the major importing countries in Europe.

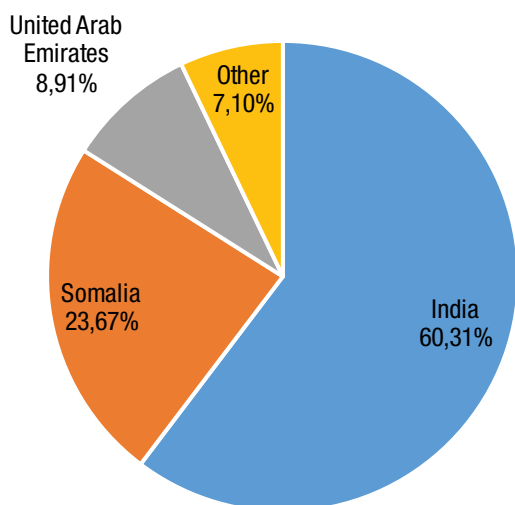
Oman’s date exports are highly concentrated with India, Somalia and United Arab Emirates accounting for 93 per cent of the total exports from the Sultanate (see figure 6). Besides these leading markets, small volumes of Omani dates are exported to Malaysia (2

per cent of the total date export value), the United Republic of Tanzania and Kuwait (around 1 per cent of the total date export value). It is also worth noting that exports to China, Jordan and the United Kingdom have recorded promising growth between 2014 and 2016.

Oman’s domestic market also offers significant opportunities for local producers. In 2016, the value of date imports in the Sultanate reached US\$ 11.3 million, an amount almost equivalent to the total value of Omani date exports (US\$ 12.6 million).

In view of the challenges faced by Omani date producers to reach new consumers, using tourism as a way to promote their products could prove a valuable opportunity to increase exports and develop value addition.

**Figure 6: Main export destination of Omani dates**



Source: UN COMTRADE

### 2.3 The marketing system

The prevailing marketing system in Oman is traditional and it does not systematically comply with the basic Gulf Cooperation Council Standard Organization (GSO) quality standard 1916/2009 on loose dates. Moreover, packaging remains an issue for many local companies even though a few of them now produce quality dates with diversified packaging.

In the MENA region, the typical marketing system for dates involves processing companies, local markets, “on tree selling” and retail outlets. Local markets are

the most important outlets for retail and wholesale trade of dates. Farmers/producers play a significant role in date marketing together with small traders. This multiplicity of intermediaries poses to the development of the marketing system. The analysis of the Omani date supply chain identified the improvement of the coordination and information sharing among actors, the development of horizontal and vertical integration, as well a greater safety and quality orientation as key drivers for improving the export performance of the sector (Mbage, Al-Shabibi and Zekri, 2011).

## 2.4 Sustainable production and value addition opportunities

Dubas bugs and red palm weevil are the dominant biotic factors affecting date quality and yield. New offshoots are being produced from tissue culture with the primary focus on superior cultivars that are being kept in the date palm tree ex situ gene bank. Enhancing fruit quality by optimizing fruit size and nutritional content, and rapid cultivar selectivity based on molecular techniques for improved commercial cultivars will increase the marketability of Omani dates. Furthermore, employing modern orchard layouts and mechanization of the labour-dependent cultural practices such as irrigation, pruning, pollination and harvesting is vital for the sustainable and profitable production of dates in Oman.

Developing organic production is also a way of

enhancing the sustainability of the Omani date sector. According to available estimates, only 38 hectares of agricultural land were dedicated to organic agriculture in Oman in 2016 (FiBL and IFOAM, 2018) and this figure had remained stable since at least 2012 (FiBL and IFOAM, 2017). In the context of a growing international demand for organic dates and with price premiums of up to 30 per cent in some markets (CBI, 2018) organic date production and export offer promising opportunities for Omani producers.

Another solution to increase the value of Omani date production and potentially reduce the share of wasted dates is the development of processing. Currently, only a couple of date by-products are available locally, but a large number of processed date products could be commercialized including date syrup, alcohol, animal feed, date powder, different types of bread, marmalade, sweet candy, chocolate, date paste, and date sugar.

## 2.5 SWOT analysis for the date sector

Dates are a major crop for Oman and play an important part in the local culture. Enhancing the sector's export performance and sustainability can boost earnings and create employment opportunities. As shown in the following SWOT diagram, an improved coordination among stakeholder, a focus on quality and the development of linkages with the tourism sector are among the priorities identified by the NGER to increase the socioeconomic contribution of the date sector in Oman.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Sustainable production systems.</li> <li>• Good infrastructure for date production and marketing in terms of irrigation, electricity.</li> <li>• Motorable roads, agricultural research centers.</li> <li>• Government support for date palm cultivation and marketing.</li> <li>• Community involvement and awareness.</li> <li>• Importance of dates in Omani culture and tradition.</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of innovation in farming and cultivation of date palms.</li> <li>• Lack of industrial coordination between production, storage, packaging, processing and transportation.</li> <li>• Dominance of traditional local markets and marketing procedures.</li> <li>• High losses of unused dates and palm date by-products; some used as animal feed; no waste management policy.</li> <li>• Low product diversification.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Dates chosen as thrust product within a coherent, Government-led export strategy.</li> <li>• Strong potential linkages between sustainable date production and tourism development in Oman.</li> <li>• Potential for introducing new varieties on foreign markets were "Deglet Nour" and "Medjool" currently dominate.</li> </ul>	<ul style="list-style-type: none"> <li>• Possible resistance from producers to adopt new production and marketing techniques.</li> <li>• International competition (value of date imports almost equivalent to that of dates export).</li> <li>• Sanitation and disease threats affecting quality and increasing losses.</li> </ul>

## SECTION 3. THE FISHERIES SECTOR IN OMAN

### 3.1 Introduction

With its 3,165 km of coastline and 31 functional fishing ports, Oman is the most important fishing country in the GCC region. Fisheries in Oman play a considerable economic and social role by providing around 280,000 tons of high quality fresh fish products for local and export markets in 2016, employing around 48,000 people, and contributing almost 0.78 per cent to the GDP. The fisheries sector is dominated by small-scale fishing, which represent more than 98 per cent of the total landings.

Government authorities have established various facilities for fishing fleets and landing services (fish auctions, ice plants, boat repair yards, fuel delivery stations, gear and equipment shops, and storage facilities). The national fleet comprises more than 22,700 fishing canoes, around 700 traditional fishing vessels and 134 coastal fishing vessels, all targeting demersal and pelagic resources. The Ministry of Agriculture and Fisheries (MAF) supports the development of national fishing fleet and infrastructure necessary to ensure a

sustainable exploitation of the national resources and develop responsible aquaculture.

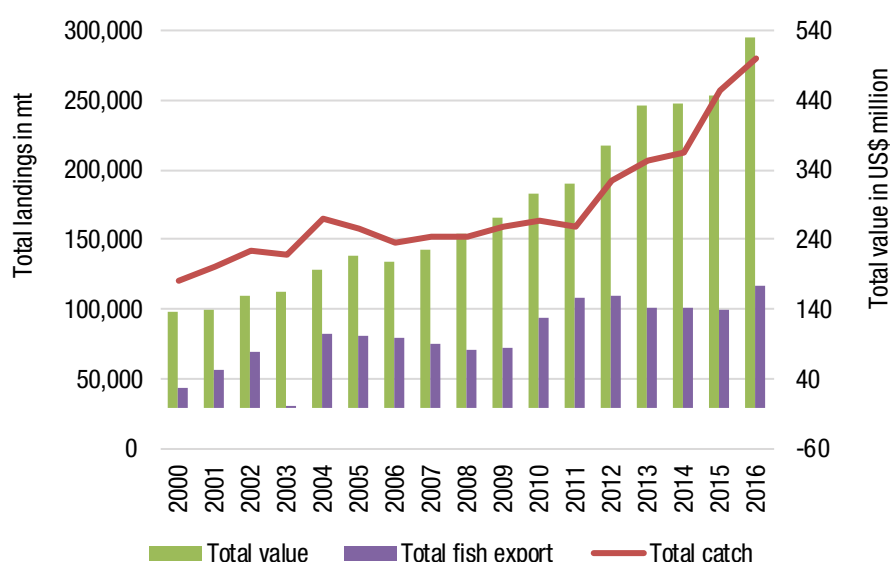
### 3.2 Fisheries production, exports and contribution to GDP

The total annual catch of fish in Oman during the period 2000 to 2016 is shown in figure 7. Between 2000 and 2016, total fish catch increased by 131 per cent, raising from 120,421 tons to 279,610 tons while its value almost quadrupled. During the same period, despite substantial fluctuations, the value of Omani fish exports increased by US\$ 144 million, reaching US\$ 172 million in 2016.

In 2016, the Al Sharqia and Al Batinah Regions recorded the most catches of large pelagic fish (see table 1) with respectively 24 per cent and 21.7 per cent of all large pelagic landings. They were followed by the Muscat Region, Dhofar, the Musandam Governorate and the Al Wusta Region which each recorded between 12 per cent and 15 per cent of Oman's total pelagic catch.

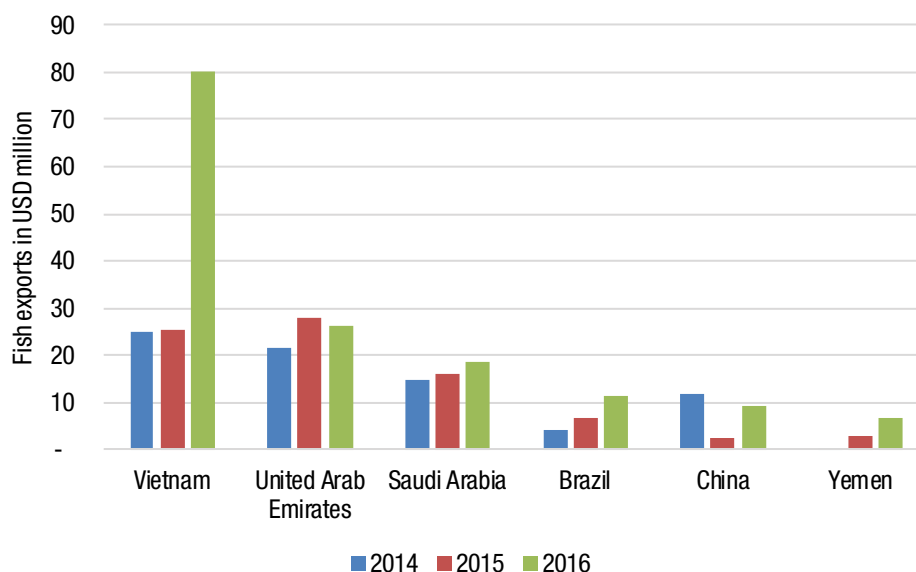
In the case of demersal fish, Dhofar registered the highest landing where the catch was 18,499 tons, which represents 30 per cent of the total landings of demersal fish in Oman, followed by Al Wusta Region

Figure 7: Total landings, value and fish exports, 2000–2016<sup>a</sup>



Source: Ministry of Agriculture and Fisheries and UN COMTRADE

<sup>a</sup> Total value of fish landings converted to US\$ using a constant rate of 0.385 US\$ to 1 RO. The total fish export value used in the present section is the export value of all products listed under SITC code 03: Fish (not marine mammals), crustaceans, molluscs and aquatic invertebrates, and preparations thereof.

**Figure 8: Main export destinations for Oman fisheries, 2016<sup>a</sup>**

Source: UN COMTRADE

<sup>a</sup> Total export value under SITC category: Fish (not marine mammals), crustaceans, molluscs and aquatic invertebrates, and preparations thereof.

Governorate, with 27.3 per cent of total landings. Then came Al Sharqia Region with 23.8 per cent, followed by Musandam Governorate with 5.5 per cent. The Muscat Governorate showed a catch level of 2,272 representing 3.7 per cent of the total landing of demersal fish in Oman in 2016.

**Table 1: Fish catch by governorate**

Governorate	Total catch (tons)	Percentage (%)
1 Al Sharqia	18,499	24.0
2 Al Batinah	16,500	21.7
3 Muscat	11,500	15.0
4 Dhofar	10,800	14.0
5 Musandam	9,800	13.0
6 Al Wusta	9,400	12.3

With regard to export destinations (see Figure 8) Viet Nam, the United Arab Emirates and Saudi Arabia have been the three largest markets for Omani fisheries since 2014, each recording annual fish imports from Oman above US\$ 10 million per year over the last 5 years. As showed in figure 8, Brazil, China and Yemen also account for a significant share of Omani fish exports. In addition to these key markets, Oman's fish exports to Qatar, Thailand, France, Italy, United States and Hong Kong, China all exceeded US\$ 1 million in 2016.

From 2006 to 2016, the export rate of Omani fish and fish products (total exported fish and fish product/ total catch) varied between 49 per cent to 61 per cent annually.

Driven by an average fish consumption nearly two times higher than global average, the domestic market remains a major outlet for Omani fisheries (FAO, 2018).

The contribution of fisheries to the national GDP fluctuated between 0.39 and 0.7 for the period 2001–2015. Over the same period, fisheries accounted on average for 37.8 per cent of the total agriculture added value (agriculture and fisheries), with a peak of 43.6 per cent in 2015.

### 3.3 Fisheries laws and investment in the fisheries sector

Since the promulgation of the Law of the Sea in 1982, significant developments in the fishing sector have occurred, related in particular to evolutions in artisanal fisheries and the inception of commercial fishing. Other regulations were introduced for marketing, processing, transport, trading and export as well as for fish farming.

A total of 114 fish processing plants are operating in Oman. This includes factories that process and package fresh and frozen fish, dry and salt fish, plants

for value-added products, and a factory for canning fish, as well as some factories for fish meal and fish oil. Most of these plants use modern technology in sorting, cutting and packaging. The Ministry of Agriculture and Fisheries has developed standards and specifications for investment projects in the sector to ensure a high level of quality for Omani fish and fish products. Special regulations for fish oil and fish meal plants are also being prepared by the Ministry. Other investment support services in the sector include fishing vessel, workshops and ice plants construction, equipment and maintenance. In addition to these efforts, the Omani Government made significant investments to establish safe fishing ports providing modern platforms for fish landing, marketing and processing.

### 3.4 Social and environmental considerations

#### *Social considerations*

The Ministry of Agriculture and Fisheries created local fishermen committees in all coastal regions to gather suggestions and recommendations on projects related to fisheries development. There are about 25 committees with 125 members in total. The local committee of Sunat Al Bihar, for instance, was established by the MAF to help solve problems and overcome the obstacles faced by fishermen and other workers in the fisheries sector.

Women play important roles in the development of the fisheries sector in Oman. In addition to their contribution to post-harvest activities such as fish drying and food processing, they are also active in fishing operations, mainly in some coastal villages, as well as in mollusc and crustacean harvest.

#### *Environmental considerations*

Although fish stocks in the Arabian Sea are considered as good, some species are overfished or overexploited,

partly due to the preference of local consumers for a limited number of species. A decrease in the total biomass has been recorded and certain zones such as sandy bottom seabed areas with a lack of natural coral reefs, are characterized by limited stock diversity.

Artificial reefs, locally named "Shod", were built by Omani fishermen in seabed areas with poor natural coral reef to provide shelter, breeding and feeding conditions. Some were built from materials not compatible with the marine environment, so the Ministry of Agriculture and Fisheries took measures to regulate the reefs and encourage the use of appropriate materials. New reefs have been established to:

1. Enhance biodiversity and maintain a suitable environment for fish.
2. Conserve fish stocks of high economic value from overexploitation through building benthic and floating artificial reefs.
3. Protect some valuable aquatic species like Abalone and Lobster.

In 2003 MAF launched the implementation of several artificial reef projects using environmentally-friendly models which are more efficient than the materials used in the past. Around 13,835 units of artificial reefs were deployed in 13 regions between 2003 and 2016 as shown in the table below.

### 3.5 SWOT Analysis

Fisheries play an increasingly important role in Oman both in terms of trade and food security. They also provide a livelihood for many coastal communities. Consultations conducted in the framework of the NGER highlighted the potential of tourism to promote sustainable fisheries while creating additional income opportunities. Against this background, the following SWOT diagram presents key opportunities and constraints and for a sustainable development of the sector.

**Table 2: Artificial reefs in Oman**

Wilaya	Shinas	Liwa	Sohar	Saham	Al Khaburah	Al Suwaiq	Al Musanaah
Number. of units	1340	961	1442	1200	1223	1843	923
Wilaya	Barka	AL Seeb	Matrah	Muserah	Sadah	Bukha	
Number. of units	1092	2361	300	10	10	994	

<b>SWOT Fisheries sector</b>	
<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Coastline extends over 3,165 km, wide water area and a wide variety of marine ecosystems.</li> <li>• Good availability of fish in all regions and good diversity of marine life and ecosystem.</li> <li>• Good support from fisheries authorities.</li> <li>• Good marketing system through central market (wholesale) and more than 300 fish outlets.</li> <li>• Important role of coastal women.</li> </ul>	<ul style="list-style-type: none"> <li>• Insufficient infrastructure (e.g. markets, workshops).</li> <li>• Research, sectorial studies and statistical data need further strengthening.</li> <li>• Fish handling and quality standards need improvements and lack of monitoring of quality and safety.</li> <li>• Weak surveillance and compliance (fishing seasons, harvested species, fishing methods and equipment).</li> <li>• Weak marketing chain.</li> <li>• Low income from fishing activities and limited contribution in GDP.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Potential linkages between fisheries and tourism.</li> <li>• Infrastructure development efforts and services, and facilities extensions in Omani ports.</li> <li>• Presence of fishermen's associations and increased stakeholder awareness.</li> <li>• Existence of underexploited resources.</li> <li>• Availability of good opportunities for fish farming.</li> </ul>	<ul style="list-style-type: none"> <li>• Climate change and ocean acidification, pollution of the marine environment.</li> <li>• Overexploitation of some species and overfishing of some others, decrease in total biomass.</li> <li>• Collapse of marine environment and extinction of natural reef and some important species.</li> <li>• Increase in illegal foreign labour and IUU fishing.</li> <li>• Non-compliance to fisheries management rules.</li> </ul>



## SECTION 4. LINKAGES BETWEEN TOURISM, FISHERIES AND DATE SECTORS

Oman's tourism industry is experiencing dynamic growth and is diversifying as a result of the national authorities' commitment towards a non-oil driven growth. The Oman Tourism Strategy (2016–2040) seeks to develop “a collection of world-class Top Experiences [...] to establish the foundation of Oman's positioning as a tourism destination”.<sup>13</sup> In line with this strategic vision, the present section will examine possible linkages between tourism, fisheries and date farming. It will look in particular into options for developing sustainable fish and dates exports while contributing to the achievement of the sustainability and inclusiveness goals of the OTS.

The following proposals builds on the consultations conducted in the framework of the Oman NGER and have been prepared for possible consideration by the Omani government.

### 1. Agritourism development

#### *Action 1.1 - Identification of possible locations to develop agritourism*

Possible sites include:

- Ibri, “One million-palm project” site located only 9 km from the city.
- Nakhal (Batinah Governorate), in the vicinity of important touristic sites.
- Samai, “One million-palm project” site with a suitable climate located close to Muscat.

#### *Action 1.2 - Organization of “agri-tours”*

Activities to be offered include:

- Visits of date plantations to showcase traditional and conventional farming methods.
- Presentations of the traditional Omani irrigation system (Aflaj or Falaj).
- Date tasting and food tasting.
- Demonstrations and sales of traditional handicraft (e.g. woven baskets and ropes from date palm tree leaves).

Agri-tours development should be combined with the development of ecolodges/hotels and potential benefits for local communities should be taken into consideration during the planning phase to maximize employment and income opportunities.

### 2. Integration of tourism activities in fishermen's villages

#### *Action 2.1 - Organization of sea trips onboard rehabilitated dhows*

- Identification of itineraries of interests for whale watching, dolphin watching, turtles, diving and fishing trips (development of short trips, half-day trips and day-trips packages).
- Organization of sea trips onboard rehabilitated/customized dhows.

#### *Action 2.2 - Organization of visits to fishermen villages*

- Organization of fish market visits.
- Development of food tasting activities.

### 3. Developing cross sectoral linkages and cooperation

#### *Action 3.1 - Establish a partnership between Ministry of Tourism, Ministry of Fisheries and Agriculture, hotels and restaurants representatives, tour operators, farmers and fishermen organizations to promote Omani gastronomy, sustainable agriculture and fisheries through tourism*

- Develop comprehensive touristic packages including visits to date farms and fishermen villages.
- Promote local sourcing from restaurants and hotels.
- Create a communication campaign to link Omani dates, fish products and other iconic Omani products with tourism.
- Associate hotels, restaurants, airlines and tour operators to the promotion of Omani products.

#### *Action 3.2 - Establish a program to assist local farmers in meeting requirements from hotels and restaurants, including in areas related to customer service, marketing, health and safety and quality management*

#### *Action 3.3 - Support the development of farmer organizations to ensure a direct commercial relationship with hotels and restaurants*

#### *Action 3.4 - Assess and build the capacity of farmers, fishermen and other relevant actors from selected local communities to meet the needs of tourists*

#### *Action 3.5 - Ensure the involvement of rural and fishing communities representatives throughout the planning and development of touristic projects in their region*

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## Notes

- 1 Excluding crude oil and heavy petrol (SITC rev 3. codes 333 and 334).
- 2 Calculations based on UNCOMTRADE data.
- 3 R. Hamwey, H. Pacini and L. Assunção, “Mapping Green Product Spaces of Nations”, *The Journal of Environment & Development*, vol. 22, No. 2 (2013), p. 155-168.
- 4 Inbound visitor statistics downloaded from the Omani Tourism Ministry website <https://bit.ly/2PEtSVx>, last accessed 27 August 2018.
- 5 World Travel and Tourism Council, “Economic Impact 2018 Oman”, March 2018 (WTTC, 2018).
- 6 2016 total export value for fish (not marine mammals), crustaceans, molluscs and aquatic invertebrates, and preparations thereof listed under SITC code 03 (source UN COMTRADE).
- 7 Source UN COMTRADE.
- 8 Government of the Sultanate of Oman (2016).
- 9 Ministry of Tourism, Sultanate of Oman. Tourism statistics available at: <https://bit.ly/2PEtSVx> (accessed 27 August 2018).
- 10 Ministry of Tourism, Sultanate of Oman. Tourism statistics available at: <https://bit.ly/2PEtSVx> (accessed 27 August 2018).
- 11 Source FAO Stats.
- 12 Calculations based on FAO and COMTRADE data. Between 2010 and 2016, exports represented on average 3.15% of the total Omani date production.
- 13 Oman Tourism Strategy, 2016, Executive Summary, Document No. 309, Extended version.