

The fish resources of Arabian Sea are favorites all over the World especially in Middle East and Europe. Oman is ranked first in all GCC countries for fisheries and agriculture contributions to GDP with a total of 3 per cent. Fisheries sector in Oman is one of the promising sectors for economic diversification. The sector has many components like long casting, suitable sites for commercial aquaculture projects, availability of infrastructure such as ports, roads and logistics. The importance of this sector is clearly showing by its main indicators as there was (49.7 thousand) the total number of the recorded fishing licenses in 2018. The total fish production in the Sultanate (553.4 thousand) tons with an increase of (59%), compared to (347.5 thousand) tons in the previous year. Traditional fishing accounted for 99% of the Sultanate's total fish production. Oman also recorded (59.5%) increase in the total fish production from traditional fishing in 2018 compared to the previous year. The total fish production from the commercial fishing has reached to (413 tons). Moreover, there was (253 thousand) tons the amount of the Sultanate's fish exports, increasing by (158.5 thousand) tons compared to the previous year. The Sultanate's total fish exports value increased by (RO 74.4 million) reaching (RO 102.2 million). The main market or the fresh fish was the GCC countries as around 80% was exported to these countries. Out of that, there was 62% of the total fresh fish exported to UAE.

Fisheries Indicators in Oman				
Item		2016	2017	2018
Fish Landed (Ton) :-		279,610	347,541	553,445
	- Artisanal Fishing	277,014	343,926	548,672
	- Commercial Fishing	163	398	413
	-Coastal Fishing	2,330	3,140	3,909
	- Aquaculture	103	77	451
Fishing Licences (No)				
	- Renewed	7,545	3,872	6,255
	- New	1,320	1,235	1,693
Export of Fish				
	- Quantity (000 Ton)	114	94	253
	-Value (000) R.O	58,821	27,831	102,197

Fishery Industrial Zone in Duqm:

The Governorate of Al Wusta is famous for its marine wealth. The governorate is rich with different types of Omani fish like shrimps, abalone, kingfish, emperor, grouper and seabream due to the long coastline as the governorate overlooks the Arabian Sea and is considered a key asset to the Omani economy in fish production internally and externally. Many residents of the governorate work in fishing and the associated professions, including fish transport, sale, and trade. This governorate considered as the largest fishing governorate in the region as there was 37% of the Sultanate's traditional fishing production in 2018 contributed by Al-Wusta governorate only. One third of production of fish from traditional fishing in Sultanate of Oman is from Al Wusta governorate. According to the Ministry of Fisheries Wealth, the Al-Wusta fishing zone has huge potential for fishing and total landings from the zone might get doubled in the coming years.

Fisheries Indicators in Duqm		
Artisanal Fishery	Boats & Vessels Lunch (Dhow)	18
	Boats & Vessels Fiber Glass	406
	No. of Licensed Fishermen	747
Artisanal Fishery: Landings (Ton)	-	85779
Artisanal Fishery: Landings Value (RO 1000)	-	21572

As a part of Governments master plan for the development of fisheries wealth in Oman, a new fishing harbor and a processing zone is being constructed at Duqm. This would facilitate the local fishing trade and also generate exports for GCC countries and other markets. Duqm is a port town in central-east of Oman on the coast of Arabian Sea widely known for its fishing settlement. The famous fish varieties and crustaceans' species are abundantly available in Duqm coast because of its proximity to Indian Ocean and Arabian Sea. Duqm and the surrounding sea is famous for its marine wealth, and it has a diverse spectrum of marine species like Sardine, Catfish, Ribbonfish, Crocker and Cuttlefish. The comprehensive plan of the SEZAD included the establishment of a fishing port, an integrated complex for fish activities, a fishing harbor at- 10 m depth, a marine research center, and an international standard quality assurance center for fresh and processed fish exports. This will be the first fishery port across the sea coast of Oman to have draft of 10m. This will allow large commercial ocean going fishing vessels to operate in the unexplored deep-sea areas. In the past, Duqm has been known as a center of the fishing industry in the Al Wusta Region, with some important species such as Grouper, Emperor, Bream and Trevally caught nearby for markets as far as Dubai, Abu Dhabi and Saudi Arabia.

The main fish types in Al Wusta Governorate are:

Fish Type		Total Landing in Al Wusta Governorate
Large Pelagics	Yellowfin tuna	3824
	Longtail tuna	229
	Kawakawa	1513
	Striped bonito	197
	Frigate tuna	187
	Skipjack	2
	Other tuna	568
	Kingfish	87
	Queenfish	916
	Baracuda	1636
	Sailfish	58
	Large Jacks	3367
	Other	1108
Small Pelagics	Sardine	147026
	Indian Mackerel	1664
	Small Jacks	314
	Mulletts	2127
	Needlefish	38
	Other	116
Demersal	Emperor	5553
	Seabream	2894
	Grouper	240
	Crocker	2268
	Sweetlips	1119
	Snapper	892
	Jobfish	280
	Rabbitfish	1051
	Catfish	7021
	Ribbonfish	7028
Other	1597	
Sharks & Rays	Sharks	432
	Rays	8
Crustaceans	Lobster	193
	Shrimp	829
	Cuttlefish	6558



Location:

Duqm Fishery Industrial Zone (FIZ) is located in the south of Duqm City, in the Wilayat of Duqm, in the Al Wusta Region on the South-East coast of the Sultanate of Oman. Duqm is bordered by the Wilayats of Mahawt (North), Haima (West) and Al Jazeer (South) with Duqm's Administration Centre, "Saay", located in Duqm Town itself. Strategically located as an emerging industrial and residential port city on the Arabian Sea, Duqm is approximately 550 km south of Muscat, Oman's Capital, and approximately 660 km from the manufacturing and super container hub Salalah in the south. The Duqm FIZ is a 7.5 million sqm site located approximately 18km south of Duqm City. Situated an average of 900m from the coast, the site sits on a plateau and is bordered to the north west by a mixture of paved and gravel access routes. A connection is under construction to link the site to the fisheries harbour, located north of the site.

Connectivity:

Duqm FIZ is accessible via two dual-carriageway roads: the Muscat – Sinaw – Mahout road (Route 32) and Muscat – Hayma – Salalah road (Route 31). As per the Duqm City Masterplan, there are an additional number of local dual and single carriageways under construction in the wider area, forming part of a more extensive local road network for Duqm City, offering potential for further connections to FIZ. This zone can be served by the airport located 12km north of the study area, which services Duqm (city). The airport currently operates direct flights to Muscat six flights per week and has the capability to operate international flights. Omani National Rail has outlined future plans to connect Duqm City with a national rail network, as well as with the wider GCC Railway project. The planned rail network will connect Duqm City to Muscat in first phase and onwards to the UAE and other Gulf Cooperation Council (GCC) countries on following phases, thereby creating an integrated multimodal transport system in and around Duqm City. The planned high-speed rail corridor will facilitate the fast transportation of containers, bulk commodities, and other general cargoes, to and from Duqm. FIZ is accessible by water at the fishery landing sites near Nafun area, located outside the project areas. Duqm Port (located 30km north of the FIZ) has been operational since 2011, predominantly focusing on bulk and break-bulk industry. Most of Oman's coast benefits from adjacencies to major international and regional shipping routes, with circum-equatorial, north-south and Asia-bound maritime shipping and tanker lanes all passing in proximity to Duqm, accounting for between 25-30% of global energy and trade flows.

Markets:

The Omani fish has been exported to around 60 countries over the world in 2018. As the largest amount has been exported to UAE with a percentage of (22%) out of the total exported amount, followed by the Kingdom of Thailand with (18%), then Kingdom of Saudi Arabia with (10%). Moreover, Oman has exported around (34%) to the GCC countries, and (44%) to non-Arab Asian countries, (9%) to the South America mainly to USA and Brazil, and (5 %) has been exported to other Arabian countries, (4%) to Africa and (1%) of the fish has been exported to Europe. As per the reports, the total fish food consumption is expected to raise by 2030 in the region as following: MENA (32.5%) – India (45.5%) – SAR (84.3%) – Africa (29.7%) . Top exporters in the world: China, Norway, Vietnam, USA, India, Canada, Chile, Sweden, The Netherlands and Indonesia. Top importers in the world: USA, Japan, China, Spain, Vietnam, France, Italy, Germany, Sweden and South Korea. Fastest-Growing fish import countries in the world: Comoros, Cambodia, Vietnam, Saint Helena, Gambia, Uganda, Tanzania, Djibouti, Zambia.

Potential Investments

The main investments can be attracted to the Fishery Industrial Zone are; fish processing, canning, fish oil and animal feed industries, creating facility for fish and shrimp farming, establishment of an international standard quality assurance center for fresh and processed fish exports, setting up a marine research center and a training extension service center and building up retail, wholesale & export markets, cold storage and warehousing, aquaculture-related



projects are proposed to be integrated into the scheme, Repairs and maintenance of fishing vessels, alongside plans for fishmeal and oil plants, electronic trading platforms, and an enhanced cluster of fish processing units.