

Unlocking the Potential of Somaliland's Fishery Sector and Marine Ecosystem

Abstract:

Amoud University's report, "Unlocking the Potential of Somaliland's Fishery Sector and Marine Ecosystem," delves into the critical aspects of Somaliland's fishery sector and marine environment. This report is structured around four key sections: situational analysis, challenges faced by the sector, key stakeholders, and areas/questions that need to be addressed. The situational analysis highlights the importance of fisheries within Somaliland's national development vision and outlines the challenges faced by the sector. Despite an 850km coastline with diverse fish species, fish consumption remains low due to supply-demand challenges. The report identifies key stakeholders, including government bodies, NGOs, and the private sector, that collaborate to address these challenges. The report emphasizes the need to address critical issues such as poor infrastructure, inadequate hygiene practices, post-harvest losses, and limited market access within the fishery sector. Additionally, it discusses the importance of private sector engagement, modernization of fishing equipment, and sustainable practices to unlock investment opportunities in the sector. Export diversification strategies for livestock and fishery international markets, regulatory reforms, access to finance, investor-friendly policies, and support for both artisanal and commercialized fisheries are also highlighted as crucial areas of focus. Sustainable management, modernization, financial support, scientific research, and regulation enforcement are recommended to optimize the fishery industry. The report concludes by emphasizing that addressing these key areas for economic development will unlock the full potential of Somaliland's fishery sector and marine ecosystem, leading to increased income, food security, and employment opportunities for the nation.

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PAPER ORGANIZATION

1. SITUATIONAL ANALYSIS

MARINE ECOSYSTEM

The Somaliland National Vision outlines five key pillars for national development by 2030, including economic development, infrastructure development, governance, social development, and environmental protection. The agricultural sector, particularly livestock and fisheries, plays a crucial role in improving livelihoods and ensuring food security. Protecting water, land, coastal, marine resources, and biodiversity is vital for sustainable development. A national water conservation program is needed to manage surface and groundwater sustainably.

FISHERY

Somaliland boasts an 850km coastline with diverse fish species, offering significant potential for economic growth and job creation. However, fish consumption is low due to supply-demand challenges. In 2021, fish production was 8,532 tons, with per capita consumption at 3.1kg in

2019. High meat prices exacerbate food insecurity. Most fish come from registered national fishing boats, primarily through Berbera Port.

International vessels face limitations, with a ban imposed in 2018-2019 due to environmental concerns and limited capacity for stock assessments. In 2021, the annual catch from international vessels was 162 tons. Registered national fishing vessels have shown a steady increase, with 74% growth from 2016 to 2021.

Table 1: Somaliland Population Estimates for 2020

- Urban: 56%
- Rural: 9%
- Nomadic Population: 31%
- IDPs: 3%
- Total Population: 4,171,898

Somaliland is economically challenged, with a GDP per capita of USD 697 in 2020. The livestock sector dominates, leading to macroeconomic volatility, exacerbated by drought and livestock bans.

2. Challenges faced by the Sector

Fishery

- Poor infrastructure and hygiene practices.
- Insufficient workshops and spare part storage.
- Inadequate post-harvest handling, resulting in high losses.
- Lack of proper landing sites, cold chain facilities, and cooling systems.
- Low awareness of fish consumption benefits.
- Skills and knowledge gaps among fishermen.
- Insufficient fishery market facilities.
- High housing costs.
- Limited marketing information.
- Lack of international marketing.

3. Key Stakeholders

The Ministry of Livestock and Fishery Development collaborates with various stakeholders, including:

1. FAO

2. GIZ
3. World Vision International
4. VSF-Germany
5. Training institutions
6. Other Ministries and Agencies in the natural resource domain
7. Private sector actors

These stakeholders are categorized as producers, government actors, private sector actors, and Non-State Actors (NSAs).

4. **Areas/Questions that need to be addressed**

Key Areas for Economic Development in the Sector:

- Identifying gaps and constraints in the fishery sector and marine ecosystem.
- Exploring investment opportunities in fishery and marine ecosystems.
- Developing an export diversification strategy for livestock and fishery international markets.
- Creating a conducive environment for private sector investment.
- Supporting both artisanal and commercialized fishery.
- Optimizing the fishery industry in Somaliland waters.
- Encouraging investment from local banks, government banks, and insurance.
- Assessing fish stocks and available fish types in marine resources.
- Addressing challenges posed by international, foreign, or illegal fishing boats.

To harness the economic potential of Somaliland's fishery sector and marine ecosystem, it is crucial to address infrastructure deficiencies, improve hygiene practices, and enhance post-harvest handling. Raising awareness of fish consumption benefits, building capacity among fishermen, and improving marketing and international trade are essential. Collaboration with stakeholders, including government agencies, NGOs, and the private sector, is vital to achieve sustainable economic development and food security in Somaliland.

1. Identifying Gaps and Constraints in the Fishery Sector and Marine Ecosystem:

- **Gaps in Infrastructure:** Insufficient infrastructure facilities, such as landing sites, cold chain facilities, and cooling systems, hinder the efficient handling and distribution of fish. Addressing these gaps will improve the sector's overall productivity.

- **Hygiene Practices:** Poor hygiene practices in fish handling and processing contribute to lower product quality and safety. Implementing hygiene standards and training programs can help overcome this constraint.
- **Post-Harvest Losses:** High post-harvest losses result from inadequate storage and transportation facilities. Investment in better storage and transportation methods can significantly reduce these losses.
- **Limited Market Access:** The lack of international marketing and inadequate access to markets can limit the sector's growth. Developing strategies to access international markets and promote Somaliland's fish products is crucial.

2. Exploring Investment Opportunities in Fishery and Marine Ecosystems:

- **Private Sector Engagement:** Encouraging private sector investment in the fishery sector through incentives and partnerships can lead to job creation and economic growth.
- **Modernization of Fishing Equipment:** Investing in modern fishing equipment and technology can enhance the efficiency and productivity of local fishermen.
- **Sustainable Practices:** Promoting sustainable fishing practices can lead to long-term benefits by preserving marine resources for future generations.

3. Developing an Export Diversification Strategy for Livestock and Fishery International Markets:

- **Market Research:** Conducting market research to identify potential export markets and consumer preferences is essential for diversifying exports.
- **Quality Assurance:** Ensuring high-quality products that meet international standards is crucial for success in export markets.
- **Trade Agreements:** Exploring trade agreements and partnerships with neighboring countries and international organizations can facilitate market access for Somaliland's fishery and livestock products.

4. Creating a Conducive Environment for Private Sector Investment:

- **Regulatory Reforms:** Simplifying and streamlining regulations related to the fishery sector can attract more private investment.
- **Access to Finance:** Facilitating access to financing for small-scale entrepreneurs and fishery enterprises through local banks and government support programs can stimulate investment.
- **Investor-Friendly Policies:** Implementing investor-friendly policies, such as tax incentives and investment protection measures, can encourage both local and foreign investors.

5. Supporting Both Artisanal and Commercialized Fishery:

- **Capacity Building:** Providing training and skill development programs for fishermen can enhance their capabilities and improve their livelihoods.
- **Value Chain Development:** Strengthening the entire fishery value chain, from harvesting to processing and marketing, can create opportunities for both artisanal and commercial fishermen.

6. Optimizing the Fishery Industry in Somaliland Waters:

- **Sustainable Management:** Implementing sustainable management practices, including regular stock assessments and fishing quotas, can ensure the long-term viability of the fishery industry.
- **Modernization:** Encouraging the modernization of the fishery industry by investing in larger vessels with advanced equipment can increase production and export capacity.

7. Encouraging Investment from Local Banks, Government Banks, and Insurance:

- **Financial Support:** Local and government banks can offer loans and credit facilities to fishery enterprises, while insurance products can mitigate risks associated with the sector, making it more attractive for investors.

8. Assessing Fish Stocks and Available Fish Types in Marine Resources:

- **Scientific Research:** Investing in scientific research and data collection on fish stocks and marine biodiversity is essential for informed decision-making and sustainable management.

9. Addressing Challenges Posed by International, Foreign, or Illegal Fishing Boats:

- **Regulation and Enforcement:** Strengthening regulations and enforcement measures to combat illegal fishing can protect Somaliland's marine resources and the livelihoods of local fishermen.
- **Diplomacy:** Engaging in diplomatic efforts to address international or foreign fishing activities in Somaliland's waters can protect the country's interests and resources.

Addressing these key areas for economic development will be instrumental in unlocking the full potential of Somaliland's fishery sector and marine ecosystem, leading to increased income, food security, and employment opportunities for the nation.

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