



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

OMAN



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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

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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 exports¹ which raised from 8 per cent to 38 per cent of the total merchandise export from the Sultanate from 1990 to 2016.²

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 methodology³ 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 2017⁴ 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 2028.⁵

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.⁶

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 2016.⁷ 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 2020.⁸

1.1 Key figures

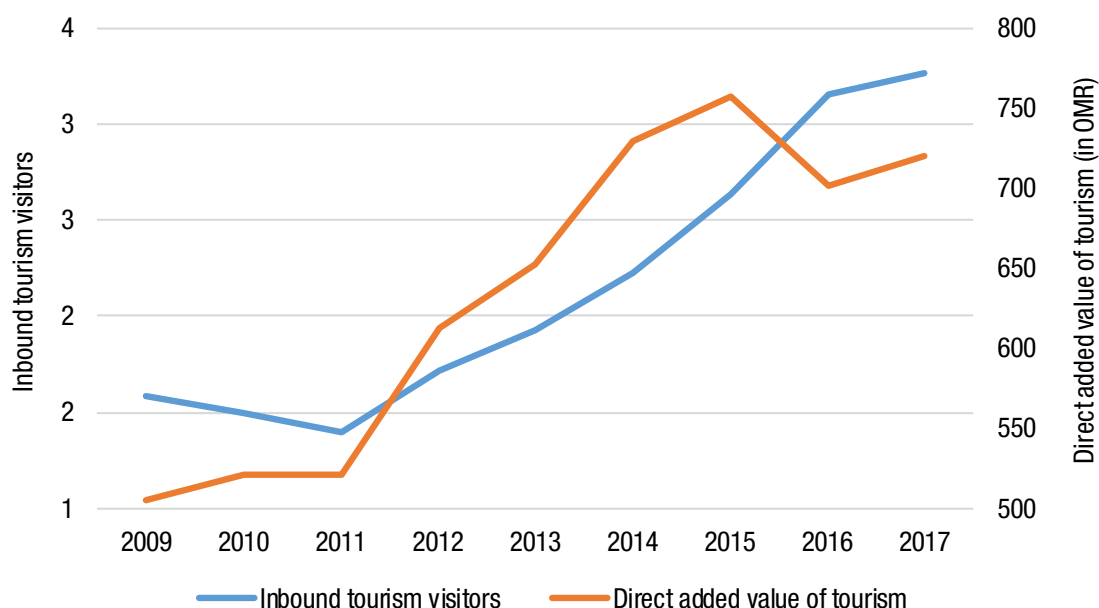
The Omani tourism sector is growing rapidly and is playing an increasing importance in the economy. The estimated contribution of tourism to the Omani GDP reached 2.8 per cent in 2016 and the direct added value generated by Omani tourism rose from RO 505 million (approximately US\$ 1.3 billion) in 2009 to RO 719 million in 2017⁹ (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 (18th rank out of 185 countries) between 2018 and 2028 (WTTC, 2018).

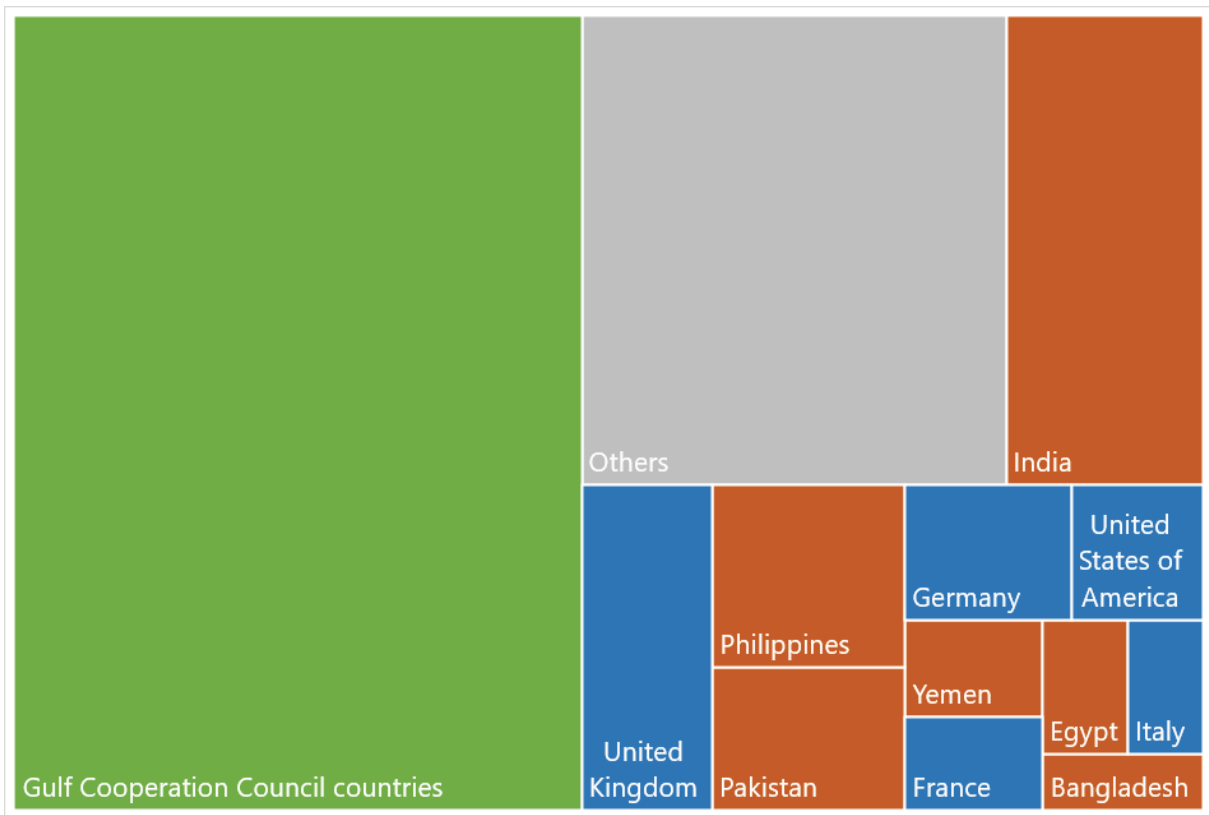
As shown in figure 1, the number of inbound tourism visitors in Oman has grown steadily since 2012, exceeding 3,000,000 in 2017. This growth is coupled with a decrease of the average expenditure per tourist which declined by 14 per cent between 2013 and 2018.¹⁰

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^a

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

^a 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

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

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