

REPOA Brief



Unlocking the Blue Economy: Insights from the Fisheries Sector in Coastal Mainland Tanzania and Zanzibar

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Key Messages

Fisheries Activities

Fisheries is central to Tanzania's economy, food security, and coastal livelihoods, but the sector's growth and potential are constrained by structural challenges that limit its full contribution to sustainable development.

Knowledge

- Indigenous knowledge is vital for sustainable fisheries governance. Local fishers hold deep generational knowledge on marine environments, which can complement scientific research and data.

Infrastructure

- Weak infrastructure and poor post-harvest handling reduce value and increase losses. Most landing sites lack cold storage and hygienic facilities, leading to high post-harvest losses and low-quality fish.

Market Linkages

- Strengthening cooperatives and data systems can boost resilience and market access. The formalisation of fishers through cooperatives and digital registration.

Objective

➤ To explore the underlying opportunities and constraints for enhancing the expansion of the fisheries sector in Mainland Tanzania and Zanzibar, while strengthening sector resilience.

Baseline Definitions – Blue Economy

World Bank	BE is a sustainable use of the ocean resources for economic growth, improved livelihoods, and jobs while preserving the health of ocean ecosystem.
EU Commission	Defines BE as encompassing all economic activities related to oceans, seas and coasts.
Centre for the Blue Economy	Defines BE as the overall contribution of the oceans to economies, the need to address the environmental and ecological sustainability of the oceans, and the ocean economy as a growth opportunity for both developed and developing countries.
United Nations	Defines the BE as an economy comprising a range of economic sectors and related policies that together determine whether the use of ocean resources is sustainable.
Environmental Institutions	Consider the BE to include economic benefits that may not be marketed, such as carbon storage, coastal protection, cultural values and biodiversity.
East African Community	Considers BE as the sustainable use and conservation of aquatic resources in both marine and freshwater environments--includes oceans and seas, coastlines and banks, lakes, rivers and groundwater.

The Significance of the Fisheries Sector in Tanzania's Blue Economy

Fisheries' Potential	Represents a strategic pillar of national development, anchored in its extensive marine and freshwater ecosystems;
	With a 1,424 km coastline along the Indian Ocean, Tanzania's mainland covers approximately 945,087 km ² , of which total water coverage is about 346,337 km ² , equivalent to 36.7% of the country's total area. Abundant inland water comprising lakes, rivers, wetlands, and reservoirs (61,500 km ² , or 6%) and marine waters (284,837 km ² , or 30%) support over 4 million people directly or indirectly through fisheries and aquaculture (WIOMSA, 2024);
	Marine and inland fisheries contribute between 1.7 and 1.8% of GDP and provide approximately 30% of animal protein nationally;
	Small-scale capture fisheries dominate production, accounting for nearly 97%, while aquaculture remains underdeveloped, representing only about 20% of national fish output but employing thousands in pond and seaweed farming.

Methodology



This policy brief draws on a scoping study carried out in June 2025 across selected areas in:

- Tanga,
- Coast, and
- Lindi regions of mainland Tanzania,
- Unguja in Zanzibar.

Data was gathered through interviews with fisheries technical staff at the regional and local government authority (LGA) levels, along with ward, village, and “*mtaa*” officials and elected leaders. Additional insights were obtained from Cooperatives, Beach Management Units (BMUs), Village Liaison Committees (VLCs), Collaborative Fisheries Management Areas (CFMA) groups, and various fishing, farming, and aquaculture associations.

Findings

Fisheries contribute 1.7 percent of GDP, directly employs 255,000 Tanzanians and a further 5,745,000 indirectly. The sector plays a critical role in food and nutrition security, supplying about 30 percent of animal-based protein consumed nationally. However, the sector’s full potential remains constrained by inadequate infrastructure, limited access to modern equipment, and other structural challenges. The sector grew at only 1.4 percent in 2024.



Fishing activities play a vital role in the livelihoods and local economies of coastal communities. These areas are among Tanzania’s most active fishing zones, contributing significantly to food security, employment, and household income, particularly through artisanal and small-scale fisheries. Coastal populations rely heavily on marine resources, with fishing serving not only as a key economic driver but also as a cultural and social cornerstone.

Identification of the landing sites and fishing grounds — In the coastal regions of Tanzania mainland and Zanzibar, fishing landing sites, locally referred to as “*mialo*”, are largely identified through historical and traditional knowledge passed down through generations of fishing communities. While mainland Tanzania has fewer landing sites, Zanzibar’s geography has led to the development of hundreds of landing points across its numerous coastal villages. However, not all these sites are formally recognised by the authorities. For instance, Unguja and Pemba have over 300 landing sites, but only about 30 are officially monitored for fisheries statistics due to their high volume of fish landings and commercial significance. On the mainland, the Fisheries Division, under the Ministry of Livestock and Fisheries, often works in coordination with local government authorities to discourage the use of unauthorised or unlicensed sites that lack essential infrastructure, such as proper buildings, reliable access to safe water, toilets, and sufficient operational space.

While government agencies and research institutions sometimes survey and map fishing grounds, local fishers possess the most detailed, practical understanding of the marine environment. Their knowledge, based on generations of daily interaction with the ocean, guides them in locating productive fishing areas, recognising seasonal fish patterns, and detecting environmental changes such as overfishing. This indigenous knowledge plays a critical role in both day-to-day fishing and sustainable fisheries management, complementing scientific data and supporting informed community-level decision-making.

Recognising the importance of these landing sites, the government has begun efforts to upgrade key sites by building safer, more hygienic, and better-equipped facilities. Such modernisation aligns with national policy frameworks, including the Tanzania Fisheries Policy of 2015 and the Zanzibar Fisheries Policy of 2022, both of which emphasise upgrading landing site infrastructure, improving post-harvest handling, and strengthening the fisheries value chain. These efforts are expected to contribute to better fisheries governance, improved livelihoods, and more resilient coastal communities.

Estimating the Number of Active Fishers in the Research Area—The fishing industry in the studied areas is largely small-scale, with some medium-sized operations and very limited large-scale activity. Accurate data on the number of individuals involved is crucial for effective management and planning. To address this, Zanzibar has introduced the Fishers Certification Programme as part of its broader fisheries sector modernisation. The programme replaces the outdated manual registration system with a centralised digital database, where each fisher receives a unique ID card. This allows authorities to accurately track the number of fishers, fishing vessels, and landing sites. The improved data system strengthens governance and supports better planning and service delivery, including training, safety, and access to technical or financial support. It also enhances transparency and accountability in managing marine resources. The initiative is aligned with the Zanzibar Fisheries Policy (2022) and the Fisheries Master Plan, both of which emphasise

modern, inclusive, and data-driven approaches to resource management. Overall, the programme marks a significant step toward sustainable fisheries governance and improved livelihoods for coastal communities.

Number of Fishers Per Research Area	Mkinga DC	Tanga City	Lindi MC	Kilwa DC	Mafia DC	Bagamoyo DC	Zanzibar
	2,811	3,200	1,237	9,901	5,137	2,363	50,000

Source: Field data 2025

Fishing Vessels, Processing Infrastructure and Marketing



Many fishers rely on locally made and small-scale fishing vessels, such as **ngalawa** (traditional outrigger canoes), small wooden or fibreglass boats, fishing lines (*mishipi*) and nets. These vessels are typically not motorised or are powered by low-capacity engines. As such, they are limited in their range and capabilities in the fishing and protection of marine resources. The findings show that limited vessel capacity prevents many fishers from accessing deep-sea fishing grounds, where larger and more diverse fish species are found.



➤ On a positive note, the President Samia Suluhu Hassan Initiative to support small-scale fishers was implemented in Mkinga DC and Tanga City:



"Under the President Samia Suluhu Hassan Initiative, our Deep-Sea Association is given a vessel (fibreglass boat) worth TZS 121,000,000, loaned without interest and repayment is after five years. However, the boats were delivered without adequate fishing gear, which forced the association to take out a loan to purchase the necessary equipment". [Interview 4th June 2025].

In Unguja, regulations permit fishing up to 12 nautical miles from the coast, but most local fishers typically operate within a range of 6 nautical miles due to vessel limitations and a lack of safety equipment. This affects both fish quality and supply. Additionally, most vessels lack cold storage or ice, leading to inadequate preservation. Commonly caught species include sardines, mackerel, kingfish, crabs, and octopus.



Fish processing remains largely artisanal in both mainland Tanzania and Zanzibar, involving manual offloading, boiling, drying, sieving, packaging, and storage. There is a scarcity of operational fish processing factories currently. However, the Tanzanian government is constructing a modern fishing harbour in Kilwa Masoko, Lindi, with berths, cold storage, and facilities capable of handling 60,000 tonnes of fish annually. A similar facility is planned for Pemba.

Zanzibar exports minimal fish due to high domestic demand, driven by tourism and local consumption. To meet this demand, it occasionally imports fish from mainland Tanzania and countries like China, Oman, and South Africa. On the mainland, there is also high demand for fish in the local market, but the Democratic Republic of Congo is a key external market. According to the FAO, the global average consumption of fish is 20.3 kilograms per person annually. Meanwhile, Zanzibar surpasses this with an average of 23 kilograms per person, highlighting fish's critical role in local diets. On the contrary, mainland Tanzania records a much lower consumption of 7–8 kilograms per person per year (MLF, 2022).

Organisation of Fishers	Fishers in the surveyed regions are generally less organised in formal cooperative structures, with only a few belongs to registered cooperatives, while most operate under informal groups.
	Despite being part of these groups, most fishers continue to produce and sell their catch individually, limiting the collective strength needed to influence market prices or advocate for better terms.
	This fragmented approach undermines their bargaining power and reduces their ability to pool resources or meet eligibility requirements for financial services, ultimately constraining their access to credit and opportunities for business growth.

Zingibari Fishing Cooperative (in Zingibari village) and Mwandusi village Fishing and Seaweed Farmers' Cooperative were some of the few cooperatives found in Mkinga district. Similarly, Tanga City Fishing Cooperative. In Zanzibar, numerous efforts to form organised fisher groups or associations have not succeeded, often due to lack of sustained institutional support.

Key Productivity Challenges and Constraints facing the Coastal Fishing sub-sector	
a. Underlying constraints	Key constraints span the entire value chain, from outdated fishing methods and high post-harvest losses to weak market access, governance gaps, and insufficient financial support.
b. Inadequate Fishing Equipment	Small-scale fishers continue to rely on traditional fishing methods including the use of weak fibreglass boats, inadequate fishing gear, and other outdated techniques;
	The vessels are not strong enough to reach deeper waters where larger and more abundant fish reside, limiting catch potential and increasing safety risks.

c. Post-Harvest Losses	Post-harvest losses remain a major challenge due to poor handling, lack of storage facilities, and inadequate infrastructure;
	The absence of cold rooms and a consistent electricity supply, especially during hot seasons, leads to fish spoilage; Consequently, much of the fish reaching the market is of diminished quality, reducing both its market value and nutritional benefit.
d. Weak Market Access	Due to limited support and weak organisation among fishers, many operate individually and struggle to access lucrative markets;
	Smuggling and evasion of official market channels to avoid levies also contribute to lost revenue and weaken formal sector regulation.
e. Governance, Legal, and Environmental Challenges	Illegal fishing practices, smuggling, and political interference undermine enforcement and sustainable fisheries management;
	Water-use conflicts are also emerging, particularly between seaweed farmers and fishers, as fishing activities around seaweed farms cause damage to the cultivated areas, escalating tensions among stakeholders.
f. Lack of Financial and Technical Support	Fishers and coastal communities receive little to no financial or technical support from either the government or international and development actors;
	Without access to credit, training, or subsidies for equipment and infrastructure, fishing communities remain trapped in low-productivity cycles.

Conclusions and Recommendations

Findings highlight the deep reliance of coastal communities in mainland Tanzania and Zanzibar on traditional and artisanal fishing practices, shaped by local knowledge, limited infrastructure, and small-scale operations. Despite a rich network of landing sites, in Zanzibar, challenges such as inadequate fishing equipment, poor post-harvest handling, weak cooperative structures, and limited access to markets and financing continue to constrain the sector's potential.

Key recommended actions to address the above challenges	
Fishing Vessels and Equipment	The Ministry of Livestock and Fisheries, in partnership with the private sector and development partners, consider to provide affordable credit schemes to enable fishers to acquire seaworthy motorised vessels and modern fishing gear.
Post-Harvest Infrastructure	Local government authorities, with support from the central government and the private sector invest in the installation of cold storage facilities and drying sheds at key landing sites.
Strengthen Fishers' Cooperatives	The Ministry of Livestock and Fisheries and cooperative development agencies to prioritise capacity-building and legal registration of fishers' groups into active cooperatives.
Manpower and Knowledge	Fisheries authorities, research and training institutions support to capacitate the fishers' communities in marine resource mapping, monitoring, and co-management frameworks.
Governance and Legal Frameworks	Central government and LGAs, strengthen regulatory framework and enforcement of fisheries regulations to prevent illegal, unreported, and unregulated (IUU) fishing.
Mobilising financial resources	Expand microfinance and credit facilities tailored to small-scale fishers, cooperatives, and processors and encourage the private sector through the Public-Private Partnerships (PPPs) to mobilize investment for fisheries infrastructure and equipment.

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