

CHAPTER 1
BACKGROUND OF THE PROJECT

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The United Republic of Tanzania has an area of 945,000m² including 886,000m² land and 59,000m² lakes. The total length of coastlines facing the Indian Ocean is approximately 800km and the exclusive economic fishery zone is 288,000m². The population was assumed to be 30,160,000 as of July 1998 and it has increased by 464,000 since 1993 at an annual rate of 3.4 %. The population of Dar es Salaam area has reached 2,940,000, which corresponds to 9.6 % of the total population. A number of immigrants have come to the metropolitan area so that poverty has been a problem recently.

The GDP per capita in Tanzania was 255 US\$ in 1998 and Tanzania is categorized as an LLDC (Least Less Developed Countries) nation, so that official development assistance by developed nations plays an important role in developing the nation. GDP was 6,500 million US\$ in 1997, while it was 2,500 million US\$ in 1994, a 2.5-fold increase from 1994 to 1997.

The primary industry in the nation is agriculture and it corresponds to about 50 % of the GDP in 1997. On the other hand, the manufacturing industry share is only 8.1 %.

Although the Government of Tanzania introduced a nationalization policy in the fields of banks, commerce, and agriculture in the late 1960s, devaluation of the local currency and inefficient public work were triggered resulting in the ailing economy being influenced by oil-shock, unstable weather, collapse of East African Nations, and the Uganda War. Since this downward trend of the economy had continued in the 1980s, the World Bank and IMF established a strategic plan targeted at the years 1982-1984. Then, a long-term economic development plan was formulated to revitalize the economy and restructure financial status in the 1980s.

In 1993, the Rolling Plan was established, including the economic development plans and middle term financial plans. The 4th Rolling Plan (1996/1997~1998/1999) aims to 1) eradicate poverty, 2) develop private sectors, 3) avoid influencing the production industry by the Government, 4) strengthen the macro-economy, and 5) formulate developments paying close attention to the environment. Based on the 4th Rolling Plan, "the National Fisheries Policy and Strategy Statement" was enacted in 1997 as a future fishery development plan, aiming at 1) enhancing, promoting and developing the fishery industry, 2) increasing wages for fishermen and catch fish, 3) increasing fish exports, and 4) providing sufficient foods to the citizens and offering job opportunities.

According to the statistics of FAO in 1996, the nation's fishery industry has the 4th highest record followed by Morocco, Ghana, and Senegal. The annual fish catch was 258,000 tons and 75,516 fishermen were engaged in 1995. The consumption for fish per person is 13kg, which is equivalent to 30 % of the protein actually consumed. It is higher compared with figures in

other African nations. Thus, fish is regarded as an essential food for low-income people in Tanzania.

In 1995, 80.2 % of the total fish catch (258,000 tons) was from inland waters. Almost half of the total fish catch, 121,000 tons, was from Lake Victoria. The remaining 19.8 % of the fish catch, 51,000 tons, was from the Indian Ocean. The actual fish catch was stagnant at around 50,000 tons from 1988 to 1995. The primary reasons for the small fishery production are 1) poorly operated fishing ships and fishing methods and 2) less developed fish circulation system. The potential fish catch is assumed to be about 100,000 tons per year for ocean fishing. It is expected once the Project is implemented that fish catch of bonito and tuna will increase in the future.

A total of 26,000 tons of fish catch, which is equivalent to 51 % of the total catch was unloaded at the Dar es Salaam area and 3,845 fishermen and 553 fishing boats were engaged in the area in 1995. Seventy-two percent of the 26,000 tons fish catch is unloaded at Banda Beach. The fish catches at Banda Beach in 1993 and 1997 were 11,519 tons and 23,713 tons, respectively, indicating an upward trend. The fish catch is mostly unloaded by small fishing ships and according to a survey by Dar es Salaam City (DCC), 541 ships are registered at Banda Beach, 290 ships of which are non-engine ships. Most of the ships have a total length of 4-10m and the largest ship has a length of 12.8m and a draft of 1.3m. There are no landing facilities at Banda Beach and the fish catch is unloaded from small ships, mooring directly at the beach. Medium ships unload their fish catch onto small ships or fishermen unload it directly from the ships in the sea. It takes about 1.8 hours per ship on average to unload catch fish, resulting in degrading fish quality in the sun and losing fish.

There are about 60 public fish markets in Dar es Salaam which are operated by DCC. Banda Beach Market is located near the estuary of Dar es Salaam Bay and it was made about 50 years ago as a natural fish market. The Market handles not only fish but also other groceries as the biggest fish market in Dar es Salaam. The channel of Dar es Salaam Port is situated near the Market. Thus, after the channel expansion project was conducted in 1997, the Market was forced to move out. At present, fish retailers sell fish at barrack-type shops. From 6 a.m. until 6 p.m., some auctions are carried out.

There are not only fishery shops but also grocery shops at the Market. Most of the shops are barrack-type and they are distributed without restrictions. Due to the channel expansion project, the shops moved toward inland areas without restrictions. There are more than 500 shops including 242 fishery shops, 125 foods and vegetable shops, 50 grocery shops, 100 cafeterias, and 10 firewood shops. Most of the shops occupy a space of 10m² or less and are being operated by two persons. There is a temporary ferry terminal near the Fish Market connecting Kigamboni and Magogoni. The surrounding area is used by approximately 5,000

people per day who wait for a ferry. However, since the facilities of the shops are not well established and sanitary conditions are bad, there are some problems in maintaining the shops. In addition, time-consuming fish landing, scaling on the beach, debris of catch fishes, poor fishery facilities, and the lack of water and sewage facilities affect the quality and quantity of the fish catch.

Under such circumstances, the Government of Tanzania requested a grant aid to the Government of Japan in July 1998 to develop fish landing facilities and fishery buildings with the aim at improving effective function of the fishery activities and solving sanitary problems. The Government of Tanzania requested the following components.

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| a) Floating Jetty: Length 25m, Width 5m | h) Vegetable Shops: 800m ² |
| b) Fish Landing Wharf: Length 25m | i) Restaurants: 35 nos |
| c) Revetment: Length 150m | j) Access Road: 250m |
| d) Auction Hall: 1,000m ² | k) Parking: 100 cars |
| e) Fish Retail Shop Buildings: 1,200m ² | l) Bus Terminal: 30 buses |
| f) Ice Plant: 5ton/day | m) Workshop: 100m ² |
| g) Fish Processing Buildings: 300m ² | n) Fishery Equipment |