Assessment Report

Fisheries Sustainability and Resource Challenges

Findings from a Stakeholder Questionnaire Survey in Qandala and Laasqoray Districts, Puntland State of Somalia

Conducted by:

SEDO Somalia

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Executive Summary

Somalia's fisheries sector represents one of the most under-leveraged opportunities for strengthening coastal livelihood security in Puntland. Both the Puntland State Government and the international community have identified fisheries as a strategic development priority, yet investment to date has concentrated in major coastal cities, leaving smaller, underserved communities without the infrastructure, skills, and data systems needed to participate safely and profitably in the sector.

This report presents the findings of a stakeholder questionnaire survey conducted in Qandala and Laasqoray, two coastal communities in Puntland's Bari region. The survey engaged fishers, fisheries managers, and community members to identify the sector's principal sustainability challenges, socio-economic constraints, data gaps, market dynamics, and capacity-building priorities — and to surface concrete, fundable opportunities for intervention.

Snap shots:

78–95% of respondents raised concerns across market access, infrastructure, illegal fishing, environmental degradation, and governance.

90%+ of respondents are concerned about overfishing, bycatch, and habitat degradation.

2 communities surveyed — **Qandala** and **Laasqoray** — with zero functioning jetties, docks, or cold-chain facilities between them.

September–April identified as the peak market season, with tuna the leading trending product.

The evidence points to a clear and financeable pathway: targeted investment in basic landing and cold-chain infrastructure, paired with skills development, a locally owned catch-data system, and stronger governance, can convert an underserved fishery into a resilient, export-ready livelihood sector — while reducing waste, protecting fish stocks, and building climate resilience for communities with few alternative income sources.

1. Introduction and background

Fisheries offer significant potential to strengthen coastal livelihood security across Somalia. The Puntland State Government and international partners have prioritised coastal industries — fisheries in particular — within their development planning. To date, however, most investment has concentrated in the largest coastal cities, leaving substantial opportunity to extend proven approaches to underserved communities where improvements to food and economic security would deliver strong, durable returns.

This report focuses on Qandala and Laasqoray, two such communities, and synthesises the findings of a stakeholder questionnaire survey designed to understand the sustainability and resource challenges — and the opportunities — facing their fisheries sector.

2. Methodology

A structured questionnaire survey was administered to stakeholders directly involved in fisheries activities in Qandala and Laasqoray.

The instrument combined multiple-choice and open-ended questions covering:

- Sustainability challenges and governance
- Concerns about overfishing, bycatch, and habitat degradation
- Socio-economic constraints facing fishing households
- Availability and reliability of catch data
- Market dynamics and seasonal trends
- Capacity-building and training needs

The survey was distributed to a diverse stakeholder sample — including fishers, fisheries managers, and community members — to ensure balanced representation across the sector and to capture perspectives from both production and management levels.

3. Key Findings

1

Overall sustainability

78–95% of respondents flagged concerns spanning market access, infrastructure, illegal fishing, environmental degradation, and governance.

2

Overfishing & habitat

Over 90% expressed concern about overfishing, bycatch, and habitat degradation — pointing to an urgent need for sustainable practices and habitat conservation.

3

Socio-economic constraints

Limited market access, transport, funding, storage equipment, and community awareness were named as critical barriers, alongside a lack of alternative livelihoods.

4

Data availability

Traditional, non-centralised data collection methods dominate; reliability is inconsistent and infrastructure for systematic data collection is largely absent.

5

Opportunities

Respondents identified clear entry points: infrastructure investment, technology, capacity building, and stronger enforcement against illegal fishing.

6

Market dynamics

Demand is seasonal, peaking September–April, with tuna identified as the leading trending product — a signal for targeted marketing and planning.

7

Capacity building

Priority needs include net-making, boat maintenance, quality control, and fish preservation techniques.

4. Major Challenges

Four interlinked constraints define the operating environment for fisheries in Laasqoray and Qandala districts. Addressing them in sequence starting with basic infrastructure unlocks value at every subsequent stage of the fish value chain.

4.1 Infrastructure:

Basic civic infrastructure is a prerequisite for any accurate needs assessment or project implementation in these locations. Road quality is generally poor, and the absence of a recent, reliable census means there is no verified breakdown of the population engaged in fishing. Neither location has a jetty, dock, or cold-chain facility, which makes landing fish difficult and constrains every downstream activity. These foundational needs require immediate attention: once addressed, the sector can begin building a genuine value chain for fish products.

4.2 Cold Chain:

The absence of cold-chain infrastructure is the single most significant barrier to profitable growth in the sector. Without a well-connected cold chain, Puntland seafood products cannot meet most export standards. The resulting waste contributes to overfishing pressure, threatens the long-term health of the fishery, and generates unnecessary greenhouse gas emissions. Closing this "Seafood Gap" through proper handling and storage represents one of the highest-return investments available to the sector.

4.3 Skills:

Skills development requires sustained support in both locations. Development attention tends to favour discrete projects with immediate, visible results over long-term capacity building. Freezers, for example, have already been installed in several coastal towns — a valuable intervention, but one that requires accompanying training. Without instruction in proper fish storage and equipment maintenance, a freezer risks standing unused or falling into disrepair once the implementing partner departs.

4.4 Data Collection:

Neither Qandala nor Laasqoray has a fish catch data collection system in place, and such systems remain rare across Somalia. Catch data are essential to understanding and managing fishing activity and to ensuring fish stocks remain healthy enough to support communities over the long term. While some cooperatives and businesses keep informal records, no centralised system exists to inform stock assessments or fishing regulation. International partners are well placed to advise on methodology and provide the tools needed to help fishers, cooperatives, government officials, and academic institutions build a data system suited to local conditions.

5. Detailed Survey Findings

5.1 Sustainability Challenges:

Between 78% and 95% of respondents raised concerns across the following areas:

- Lack of market access
- Infrastructure limitations, including inadequate storage equipment and poor roads
- Environmental degradation caused by drift netting
- Illegal fishing
- Governance issues, including insufficient collaboration between government and local cooperatives

5.2 Overfishing and Habitat Degradation:

More than 90% of respondents expressed concern about overfishing, bycatch, and habitat degradation, underscoring the urgent need for sustainable fishing practices and habitat conservation measures.

5.3 Socio-Economic Challenges:

Respondents in both communities identified the following constraints:

- Lack of access to marketplaces
- Transportation constraints
- Funding shortages
- Lack of storage equipment and community awareness
- Insufficient knowledge about the nutritional and economic importance of seafood
- No fixed pricing for fish sales between Bosaso and Laasqoray fishers
- Absence of alternative livelihoods within the fisheries sector

5.4 Data Availability and Reliability:

Traditional, informal data collection methods dominate, and perceptions of data reliability vary considerably among respondents. There is a clearly recognised need for improved data collection infrastructure and accompanying capacity building.

5.5 Opportunities:

- Investment in infrastructure, technology, and capacity building
- Strengthened enforcement against illegal fishing practices
- Market development and capacity-building initiatives

5.6 Market Dynamics:

Market activity follows a clear seasonal pattern, with September to April identified as the most dynamic period. Tuna was highlighted as a trending fish product, offering a concrete anchor for market development and promotional efforts.

5.7 Capacity Building Needs:

Respondents identified a consistent set of priority skills, including:

- Net making and repair
- Fishing boat maintenance
- Quality assurance and quality control training
- Fish preservation techniques

6. Conclusions and Recommendations

The evidence gathered in Qandala and Laasqoray points to a fisheries sector with genuine growth potential that is currently constrained by four solvable problems: missing basic infrastructure, absent cold-chain capacity, limited technical skills, and the lack of a functioning data system. None of these constraints is unique to these two communities, which means investment here is also a proof point for extending the same model to other underserved coastal areas of Puntland.

Based on these findings, this report proposes five interlinked projects to address the identified challenges and capitalise on the opportunities uncovered by the survey:

Proposed Project	Focus Areas
1. Sustainable Fisheries Management Programme	Promote sustainable fishing practices, habitat conservation, and governance reform; foster collaboration between government agencies, NGOs, and local communities.
2. Capacity-Building Initiatives	Deliver training in technical fishing skills, quality assurance and control, and the importance of seafood quality; support the establishment of marketplaces and transport infrastructure to improve market access.
3. Data Collection and Monitoring System Enhancement	Upgrade data collection infrastructure for accurate, timely catch data; train stakeholders in data collection techniques and promote data-sharing between cooperatives, government, and researchers
4. Awareness Campaigns and Community Engagement	Launch awareness campaigns promoting sustainable seafood consumption and environmental conservation; engage communities on the importance of fisheries management.
5. Climate Resilience Initiatives	Implement measures to mitigate the effects of climate change on aquatic environments and fisheries livelihoods; support alternative livelihood development and ecosystem-based management approaches.

Together, these interventions offer donors a coherent, sequenced investment pathway from foundational infrastructure through to governance and climate resilience with clear potential to improve food security, increase household incomes, and safeguard fish stocks for the communities of Qandala and Laasqoray over the long term.

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