The HAILA INITIATIVE

HAILA COUNTRY NOTES

01

OMAN

Population Distribution and Spatial Analysis

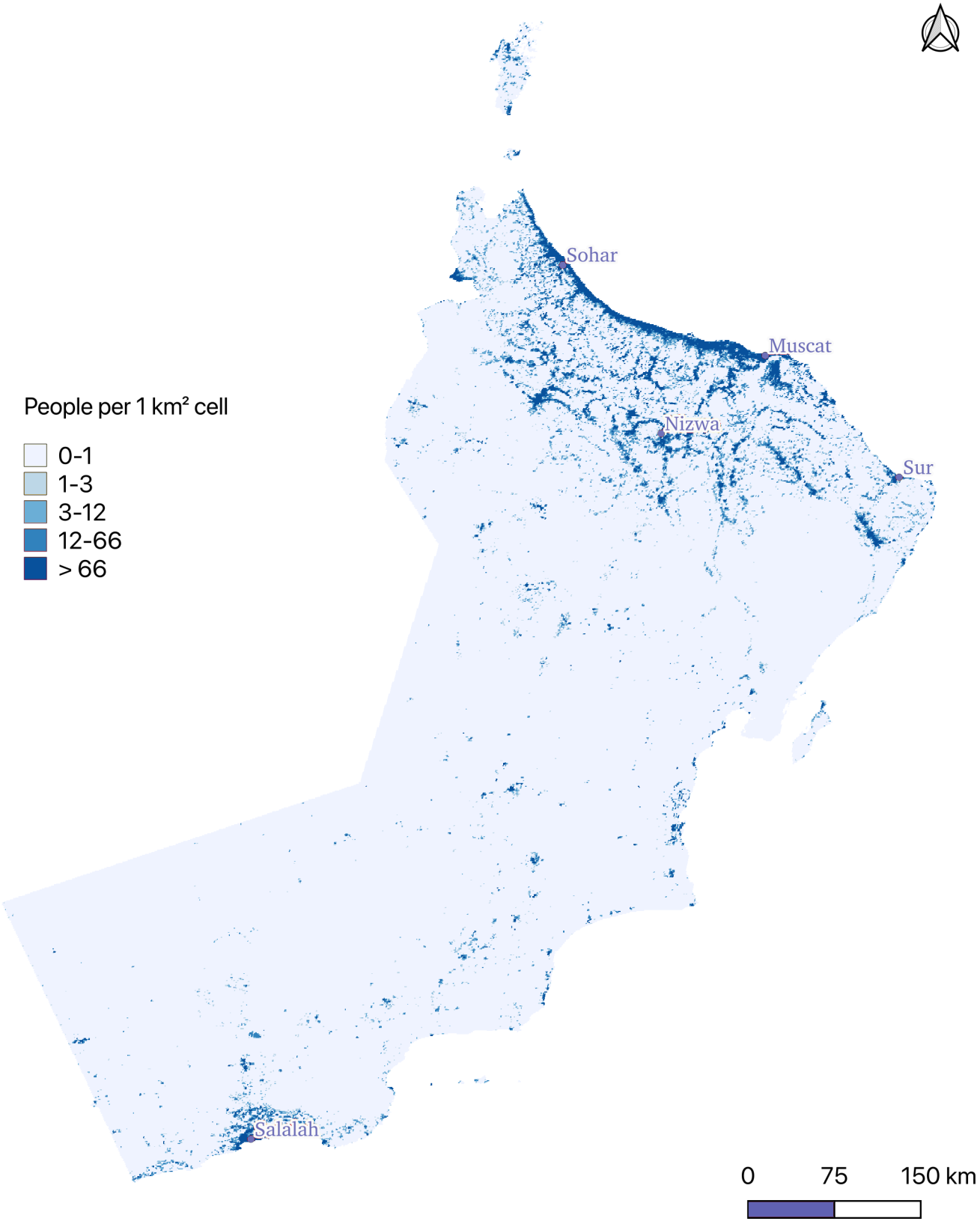
A country is not a single market

Country-level indicators can conceal spatial differences within a country. This report maps Oman's population distribution using GHSL data and discusses what it means for market research.

Source: European Commission, JRC — GHSL, 2025 (modelled estimate). Boundaries: geoBoundaries.

OMAN | POPULATION 2025

Spatial distribution



Source: European Commission, JRC — GHSL, 2025 population grid
2025 population figures are modelled estimates, not census counts.
Analysis & visualisation: The HAILA Initiative

A Country Is Not a Single Market | HAILA Country Notes #1: Oman

In market research, country-level indicators, such as total population or total imports, are an important starting point. However, these aggregates often obscure spatial variations within a country. In this note, we examine Oman's population distribution spatially and discuss what this means for market analysis.

Data and methodology

This analysis is based on the GHSL dataset of the Joint Research Centre, European Commission. Population in this data is modeled as estimated residents per 1 km² cell; it is not a census but a modeled surface. We used the 2025 layer and do not present it as a current census. Country boundaries come from geoBoundaries. The map was produced in QGIS.

Observations

Population in Oman is not evenly distributed across the country. The highest densities occur along the northern coast, on the line from Muscat to Sohar. Smaller clusters appear around Nizwa and Sur, and in the south near Salalah. Across much of the interior, population per cell is close to zero.

The gap between policy and settlement patterns

Oman Vision 2040 and the Duqm Special Economic Zone aim to shift economic weight away from this settled pattern. Yet the Duqm coast is almost unpopulated today. This is not a criticism; it is a matter of timing. Supply plans for Duqm should be based on future project flows, not today's population.

What this means for market research

A country's total population or total imports, taken alone, are not sufficient indicators for a manufacturer's market decision. High density does not automatically mean industrial demand or potential buyers concentrate in the same places. This map shows where people live; nothing more.

This is precisely where market research that starts at the country level needs to deepen to the city and region level. The next step will be to examine how relevant sectors and industrial zones align, or do not align, with this population distribution.

HAILA Country Notes will examine one country per issue with the same method: the same cell classes, the same color scale, the same question. The difference will lie in the country, not the method.

Data sources

- Population data: European Commission, Joint Research Centre (JRC). Global Human Settlement Layer (GHSL) — Population grid (GHS-POP), 2025 epoch. DOI: 10.2905/0BD6B41C-80B2-4B92-8390-539A70551A8E. URL: https://ghsl.jrc.ec.europa.eu/
- Administrative boundaries: geoBoundaries — A global database of political administrative boundaries. Version 6.0.0. URL: https://www.geoboundaries.org/
- Software: QGIS Geographic Information System. Open Source Geospatial Foundation Project. URL: http://qgis.org

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