



# European Maritime and Fisheries Fund (EMFF)

## Italy

### Italy – overview



#### Coast, lakes and ports

Italy's coastline spans 9 136 km, making up 8.75 % of the total EU coastline. The surface of the coastal regions (in line with the Eurostat definition) runs to 181.289 km<sup>2</sup>, approximately 10 % of the EU total and 60 % of the national territory.

Six Italian ports feature in the top 20 ports in Europe: Trieste, Genoa, Augusta, Taranto, Venice and Gioia Tauro; in terms of fisheries activity, however, the main ports are Mazara del Vallo, Trapani, Palermo, Chioggia, Ancona, Molfetta and Manfredonia.

#### Potential

Italy's main maritime activities are coastal tourism, fisheries, short sea shipping, cruise tourism, ship building and ship repair, passenger ferry services and deep sea shipping. The maritime cluster contributes to 2.6 % (EUR 39.5 billion) of the national gross domestic product (GDP), 11 % of the productivity of the transport sector and around 2 % of the total labour force. Fisheries and aquaculture production only represent around 5 % of the entire production and added value of the primary sector in Italy.

In 2013, the Italian fishing fleet contained 12 635 registered vessels, with a combined gross tonnage of 164 000 GT, a total power of 1 019 000 kW and an average age of 31 years. The 2 108 demersal trawlers and seiners registered in the same year represent the main fleet, accounting for almost 60 % of the total active Italian gross tonnage.

The Italian aquaculture sector produced 191 181 tonnes in 2012, corresponding to a total production value of EUR 465 million. Organic aquaculture is regarded as the most promising area, in terms of market demand.

Italian processing companies rely heavily on imports, and only recently has the processing of raw materials from aquaculture been viewed as an opportunity to reduce dependency on imports. More than 70 % of the production intended for processing is processed and canned directly by aquaculture companies, thanks to the vertical integration of production processes.

Italian inhabitants consume an average of about 25 kg per head of fisheries products each year: this places Italy slightly above the EU-28 average consumption level of 23.1 kg per head.

#### Economic performance and employment

##### Fisheries

Although the fishery sector's contribution to the national GDP remains limited overall (less than 0.3 % of Italy's GDP), it is more significant in certain regions, in particular in the south. In 2013, 8 297 fishing enterprises were registered in the Italian fleet.

In 2013, the Italian fleet spent a total of around 1 494 days at sea, generating around EUR 834 million in total landings, with European hake, European anchovy, deep-water rose shrimp, giant red shrimp, common cuttlefish and Norway lobster being the principal earners. As regards weight, in 2013 the fleet landed 173 000 tonnes, but since 2008, landings in weight have declined for almost all top species except the giant red shrimp and European pilchard.

Since 2008, income from landings has dropped more than 30 %. This notable decline in income is partially offset by a 26 % reduction in operating costs (EUR 644 million in 2013). This is mainly thanks to reduced labour costs (- 20 %) and energy costs (- 27 %). As for economic performance, the total amount of gross value added (GVA), gross profit and net profit generated by the Italian national fleet in 2013 were EUR 431 million, EUR 197 million and EUR 34 million, respectively.

##### Aquaculture

In 2012, the total population of aquaculture farms was 813, spread across 587 enterprises. The Italian aquaculture sector is dominated by small enterprises with fewer than 5 employees. In the same year, total employment was represented by 5 164 persons and 1 937 FTEs.

##### Processing and marketing

In 2012, the turnover of the Italian processing sector amounted to EUR 2.557 million. The industry is characterised by a two-faceted market presence: on the one hand, the so-called modern sector with a few large industrial companies; and on the other hand, the traditional sector, highly atomised and comprising mainly micro, small and medium-sized enterprises, many of which are run on a family basis. Indeed, 70 % of enterprises are micro-enterprises with fewer than 10 employees. There are 6 197 people employed in the sector, and 5 223 FTEs.

# Italy's EMFF Operational Programme



## Budget

**Total (EU + national):**  
**€978 107 682**

**EU contribution:**  
**€537 262 559**

The Operational Programme (OP) covers the six 'Union Priorities' defined in the EMFF, namely:

-  promoting environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based **fisheries**;
-  fostering environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based **aquaculture**;
-  implementation of the **Common Fisheries Policy (CFP)**;
-  increasing **employment and territorial cohesion**;
-  fostering **marketing and processing**;
-  fostering the implementation of the **Integrated Maritime Policy (IMP)**.



## 1. Fisheries

### What?

Italian fisheries are characterised by a declining trend in landings (in both weight and value). The total weight landed by the Italian fleet in 2013 was around 173 000 tonnes of seafood, with a landed value of EUR 834 million. Between 2008 and 2013, the total value of landings decreased by 32 % and the total weight of landings by 24 %.

### OP aim

The programme aims to ensure that fishing capacity and available fishing opportunities are better balanced, and to strengthen the competitiveness and profitability of fishing enterprises.

Support is provided to address the overcapacity of the Italian fleet, and to identify more effective action to reach an exploitation resource based on maximum sustainable yield (MSY). The diverse nature of Italian fisheries and the exploitation of many fish stocks by different tools and fleet segments call for the adoption of a strategy that differentiates and delimits homogeneous areas of intervention for groups of species and for fishing systems. Fishing mortality will also be reduced by curtailing the fishing effort, under the temporary cessation measure in accordance with Common Fisheries Policy (CFP) management plans.

In order to increase the domestic and external competitiveness of the sector, the programme supports training activities, advisory services, technology development and innovation and the promotion of human capital, and encourages cooperation between scientists and fishermen.

To foster balanced sector development, the programme supports the consolidation and strengthening of port facilities linked to fisheries and mariculture, the improvement of hygiene, health and safety conditions for fishermen and the enhancement of product quality, and encourages diversification into tourist services and recreational fishing.

For small-scale coastal fisheries, a specific action plan has been designed to enhance local employment and preserve local heritage. Where possible, the above measures will also be implemented in relation to inland waters.

### Key result

Environmentally, economically and socially sustainable fisheries.

### Budget

**EMFF + national: €346 111 570**  
**EMFF: €173 055 785**



## 2. Aquaculture

### What?

Aquaculture in Italy encompasses the unique knowledge, experience, excellence and culture that have fostered the development of diversified farming practices while adapting to Italy's favourable geomorphological, climatic and environmental characteristics. It is diverse, including intensive installations by rivers and lakes, extensive plantations in coastal lagoons, wetlands and offshore marine culture.

According to the Food and Agriculture Organisation (FAO) data, in 2012 Italy accounted for 13 % of the volume of EU aquaculture (after Spain, France and the United Kingdom), and for 10.7 % of the production value.

### OP aim

The programme aims to enhance the Italian potential for growth and innovation in aquaculture, to help reduce the intense dependence on imported seafood.

In line with the national multi-annual strategic plan for aquaculture, the programme will focus on two main priorities:

- 1) promoting environmentally sustainable aquaculture development, with a focus on organic production, by maintaining healthy and productive aquatic ecosystems and making use of appropriate spatial planning;
- 2) strengthening the competitiveness and profitability of aquaculture enterprises by supporting product innovation and processes, diversification into species with better market prospects, the creation of a hatcheries company or consortium, breeding of species for different uses from food consumption or innovative forms of aquaculture with high growth potential such as offshore aquaculture.

### Key objective

An environmentally, economic and socially sustainable aquaculture sector with a marked increase in organic production.

### Budget

**EMFF + national: €221 134 830**  
**EMFF: €110 567 415**



## 3. Common Fisheries Policy (CFP)

### What?

Reliable data on fish stocks and effective control of fishing activities are crucial for implementing the revised CFP, particularly for the implementation of the discard ban and fisheries management based on MSY.

These activities are particularly challenging for Italy, given its fisheries' multi-species and multi-gear attributes, the wide variety of its marine and coastal environments and the specific threats arising from third countries on the south rim of the Mediterranean.

#### OP aim

The programme supports the implementation of the national data collection plan in line with the existing Data Collection Framework (DCF), which aims at collecting, managing and using biological data on fish stocks, data on fishing activity (capacity, effort, catches and landings) and social and economic data for marine fisheries, aquaculture and processing sectors.

The Corpo delle Capitanerie di Porto (the Italian coastguard) is responsible for ensuring proper control and enforcement of the CFP. The programme will support training and operational costs to increase the quality and number of controls, and to ensure that the priorities identified by the national Control Plan are fulfilled.

#### Key result

Supporting the CFP with the collection, management and use of high-quality data in the fisheries and aquaculture sector, and by implementing a high-quality control, inspection and enforcement system.

#### Budget

**EMFF + national: €120 335 674**  
**EMFF: €102 428 971**

### 4. Community-led local development (CLLD) strategies



#### What?

Italy is one of the most promising places in the EU for promoting CLLD, thanks to its favourable geomorphological situation, its enormous variety of coastal environments, the existence of lagoons, wetlands and other inland waters important for aquaculture activities, its amazingly rich cultural and historical heritage and the small-scale coastal fleet in areas dependent on fisheries.

#### OP aim

The programme aims at promoting social cohesion and job creation in communities dependent on fishing and aquaculture, through enhanced local participatory development. Promoting human capital and diversifying activities are prioritised, allowing local communities to acquire the necessary skills to participate in new emerging activities.

The objective is to reverse the decline of coastal communities dependent on fishing, adding value to their day-to-day activities and promoting diversification into economic activities identified by a bottom-up approach based on the existing potential of each area. Producer organisations will be involved in the process, in order to better exploit local production and strengthen the link between supply chains and territory.

The programme will also support the creation of a national network of FLAGs.

#### Key result

Help fisheries and aquaculture-dependent communities to diversify their economies, add value to their fishing and aquaculture activities and create new jobs.

#### Budget

**EMFF + national: €84 860 000**  
**EMFF: €42 430 000**

### 5. Marketing and processing



#### What?

In 2012, Italy possessed the biggest fish-processing industry in the EU in terms of number of enterprises, with 16 % of the total EU figures. Under the EFF, Italy had already started a process to improve vertical integration from the fisheries and aquaculture sectors into the supply chain for the processing and marketing industry.

Today Italy has 43 producer organisations, which account for 111 producers, and 2 inter-branch organisations with the main aim of coordinating collective activities. Despite the potential for market development and the high quality of the production, a significant gap remains between the production and the consumer price.

#### OP aim

Producer organisations (POs) and their associations are called on to play a key role in achieving the CFP objectives and in reforming the common market organisations (CMOs).

The programme aims at enhancing the role of POs by supporting a process of rationalisation for the national territory with a focus on the added value that POs can bring to the supply chain, and by developing collective actions.

In terms of aquaculture products, the programme will support the promotion of a level playing field and actions for communication, traceability, certification and marketing.

#### Key result

Rationalise the POs, increase value added and shorten the supply chain.

#### Budget

**EMFF + national: €138 088 028**  
**EMFF: €72 088 028**

### 6. Integrated Maritime Policy (IMP)



#### What?

Due to its location midway in the Mediterranean Sea basin, Italy shares more borders at sea than any other EU country and faces serious challenges in terms of security (i.e. irregular migration, illicit traffic, pollution at sea) and resource sharing (i.e. fisheries stocks, natural resources under the continental shelf), particularly concerning the south Mediterranean rim.

Italy is also a major player as regards all the maritime aspects of the European Strategy for the Adriatic and Ionian Region (EUSAIR).

#### OP aim

The programme aims at increasing the efficiency of maritime surveillance in order to improve safety and maritime security, controlling fishing activities and preventing pollution, and promoting more effective information exchange across maritime sectors. Supporting the Common Information Sharing Environment (CISE) will help widen the network of marine protected areas and improve knowledge on the marine environment and its interaction with human activities.

#### Key results

Complete the CISE, acquire high-quality marine knowledge and widen marine protected areas.

#### Budget

**EMFF + national: €8 891 120**  
**EMFF: €4 445 560**

### Simplification

The programme supports measures to reduce red tape for beneficiaries, with a view to ensuring transparency, integrity and accountability in public administration. The aim is to focus human and financial resources on results-oriented activities rather than on bureaucratic matters. The priorities are as follows:

- simplifying procedures for operations selection, and promoting an electronic application system;
- improving access to and transparency of information;
- where appropriate, applying the simplified calculation of costs;
- improving the information system.

### Synergies

Coordination of ESI funds is ensured by specific structures (i.e. the new ESIF National Coordination Committee and Board, as well as evaluation and monitoring committees) in order to support implementation of the policy recommendations made in the context of the European Semester, and to channel resources to the Thematic Objectives (TOs) identified in the Italian Partnership Agreement.

In particular, thanks to the multi-funded approach of the CLLD, vital synergies are expected to boost local development of fisheries and aquaculture-dependent areas.

The EMFF OP will also create synergies with the Horizon 2020 framework programme, the measures to support SME competitiveness under COSME 2014-2020, the environmental measures under the integrated projects of LIFE+, and with other EUSAIR-related OPs.

## Success stories

See examples of the success stories financed in the previous programming period at <http://www.buonepratichefep.it> online.



## More information

- European Commission Fisheries
- European Maritime and Fisheries Fund
- Aquaculture multiannual plan (Allegato 6)
- National website