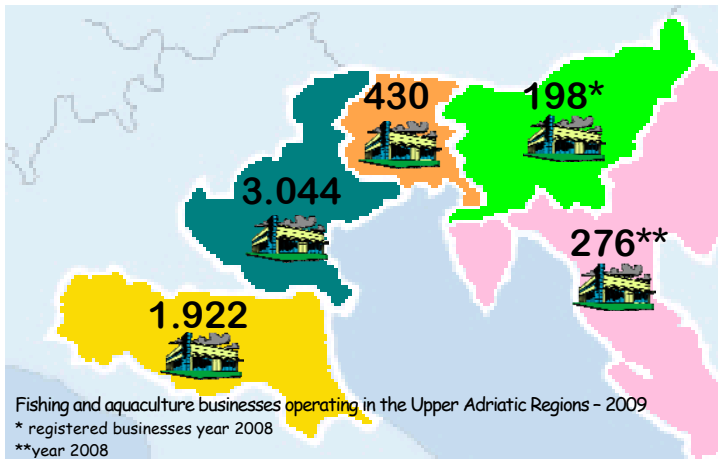


Fishing in figures

n. 31 January/February 2010



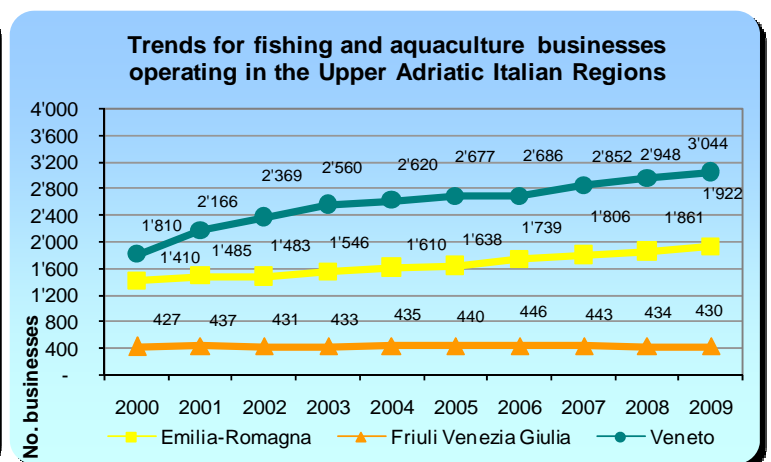
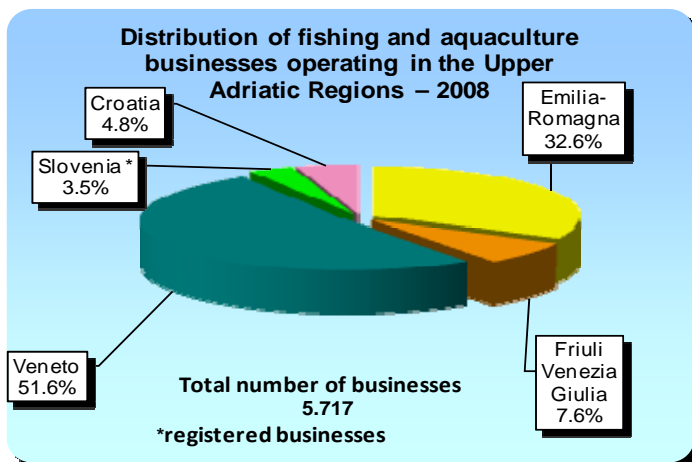
FISH AND SEAFOOD BUSINESSES IN THE UPPER ADRIATIC



In this first issue for 2010, we discuss once again the structure of the fish and seafood production chain, including fishing and aquaculture businesses, as well as fish, molluscs and crustacean processing industries, and wholesale and retail companies dealing in fish and seafood products. The analysis of the fish and seafood production chain focuses primarily on the Upper Adriatic Italian regions; for Slovenia and Croatia a detailed examination is made of the number of companies, operating in the production sector, and some information is provided regarding companies operating in the fish and seafood processing sector. The

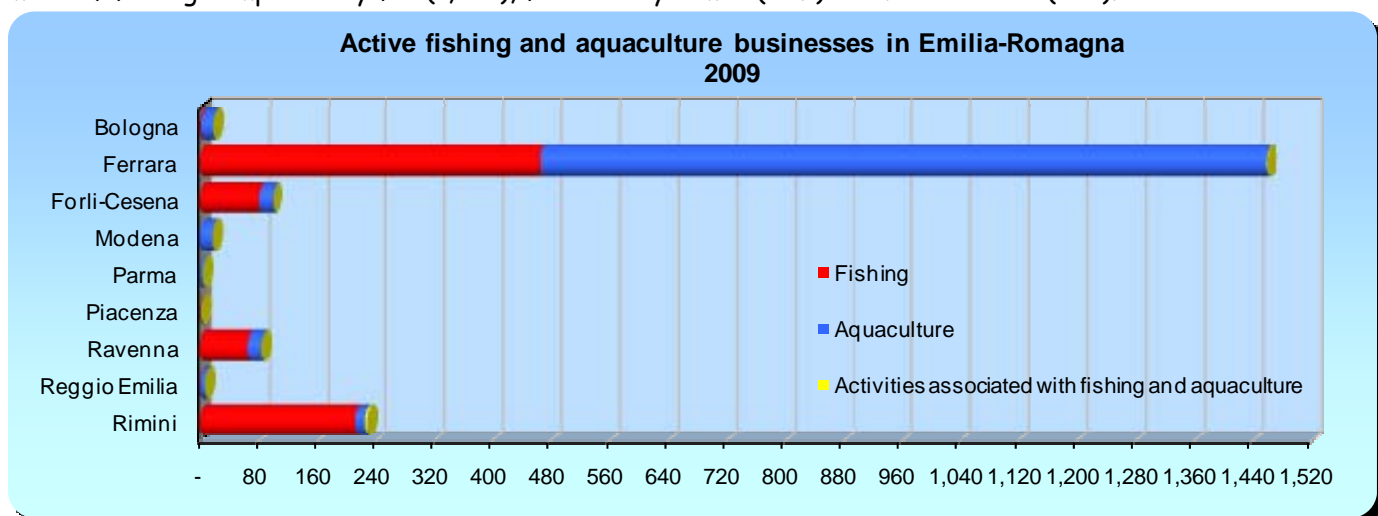
following statistical sources were used for data processing: the Italian Chamber of Commerce databank for Italy, and the respective statistical institutes for the Balkan regions. With respect to the 2009 data for Italian companies and the 2008 data for Slovenian companies, it should be noted that modifications were made to the classification of economic activities system (NACE Rev. 2) that affect the fish and seafood sector. Specifically, in the NACE Rev. 2 classification, fishing and aquaculture activities were added to the primary production sector, which includes agriculture, forestry and hunting (Sector A). Similarly, the classifications for processing (changed to C 10.2) and wholesale and retail activities were changed (G 46.38, G 47.23 respectively and G 47.81.02 for mobile vendors).

In 2008, the number of businesses operating in the fish and aquaculture sector in the Upper Adriatic Regions was 5,717. As in recent years, Veneto has had the greatest number of companies (51.7%), followed by Emilia-Romagna (32.6%). Companies in Friuli Venezia Giulia represented 7.6%, while Croatia and Slovenia accounted for 4.8% and 3.5% respectively. The graph on the right shows the trend for the past ten years in the three Italian regions. Veneto experienced considerable growth while Emilia-Romagna experienced less dramatic growth. In contrast, the number of fish and seafood businesses in Friuli Venezia Giulia essentially remained stable.

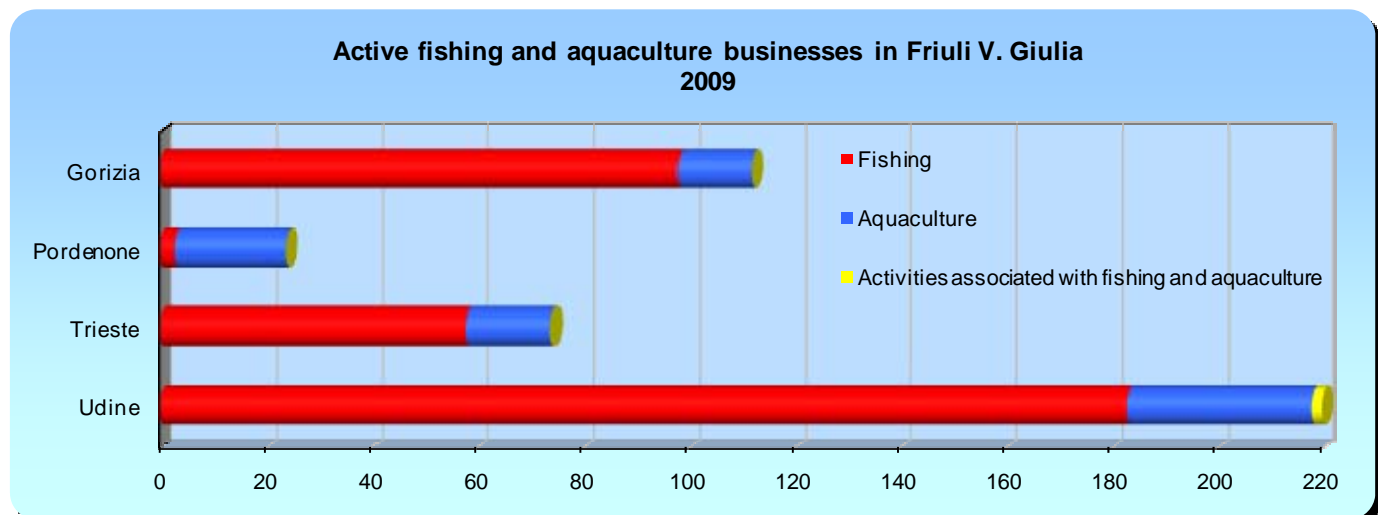


Source: Processed by the Socio Economic Observatory for Fishing and Aquaculture using data from Infocamere, the Statistical Office of Slovenia and the Central Bureau of Statistics of the Republic of Croatia

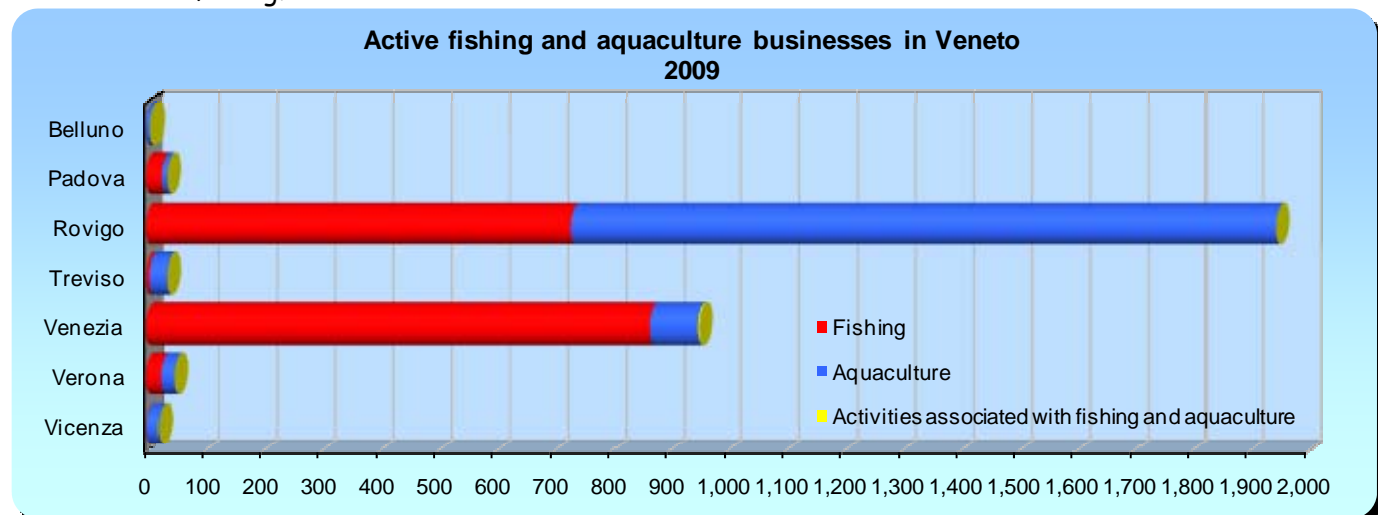
In Emilia-Romagna, the number of fishing and aquaculture production units increased by 3% with respect to 2008. The largest increase was in the number of aquaculture companies, a sector which has experienced continuous growth over the past three years. From a geographical perspective, the province of Ferrara still has the largest number of fishing companies by far (1,461), followed by Rimini (229) and Forli-Cesena (100).



In Friuli Venezia Giulia, which has 4 fewer businesses than in 2008, companies are located primarily in the provinces of Udine (220 companies), Gorizia (112) and Trieste (74) and are mainly fishing companies.

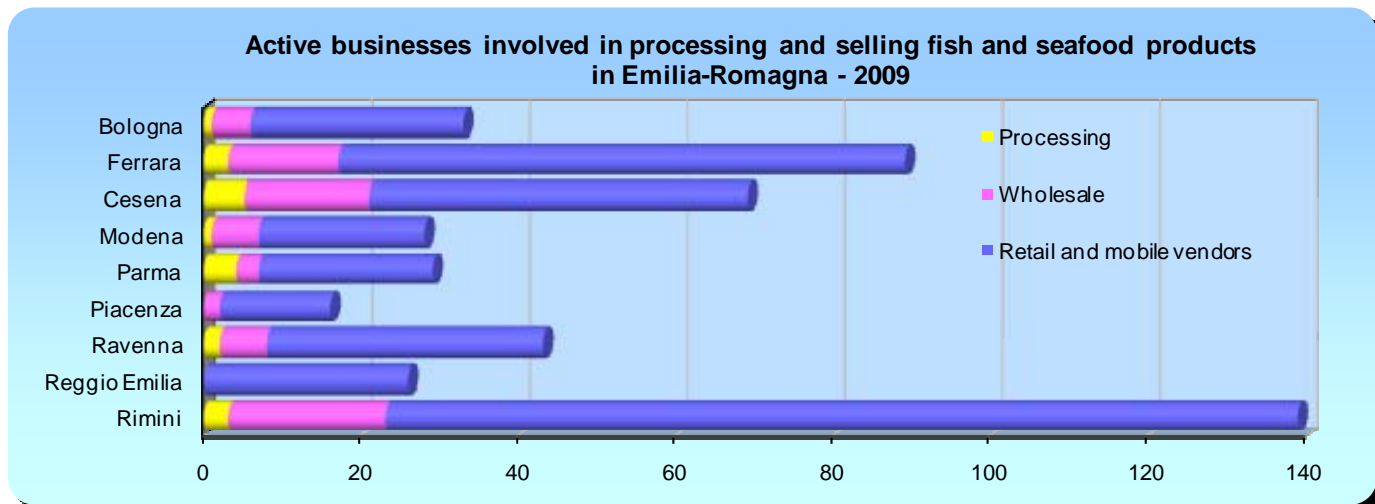


In Veneto, the number of fish and seafood businesses grew by 3% in 2008, with an increase in the number of aquaculture companies and a slight decrease in the number of professional fishing companies. Rovigo's strength in this sector is evident in the graph: a total of 1,946 production businesses with 1,215 of these operating in the aquaculture sector. Fishing is also important in the province of Venice, where the majority of its 952 companies are dedicated to fishing.

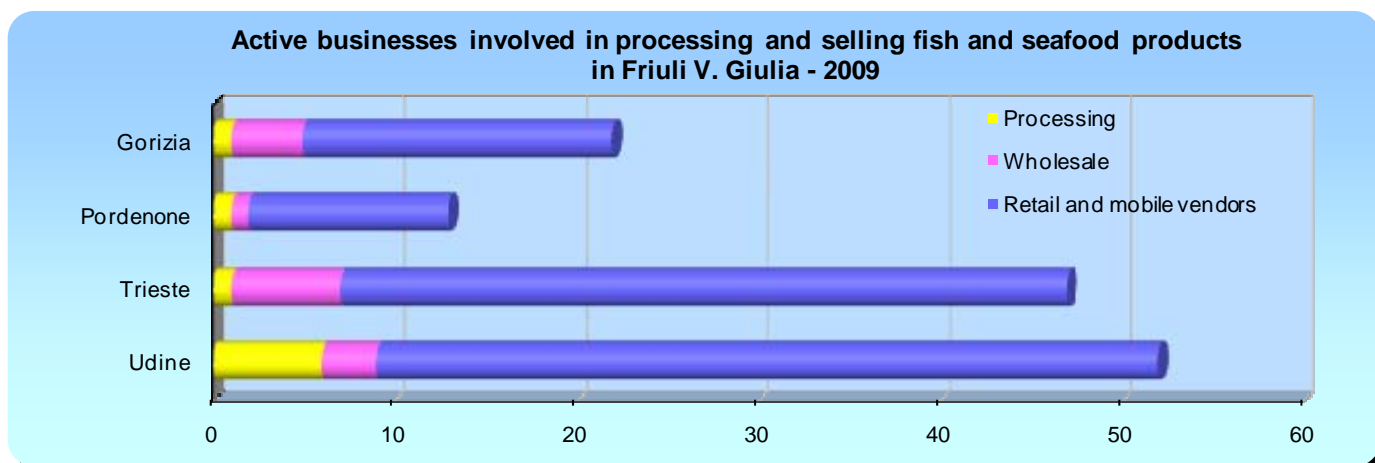


Source: Processed by the Socio Economic Observatory for Fishing and Aquaculture using data from Infocamere

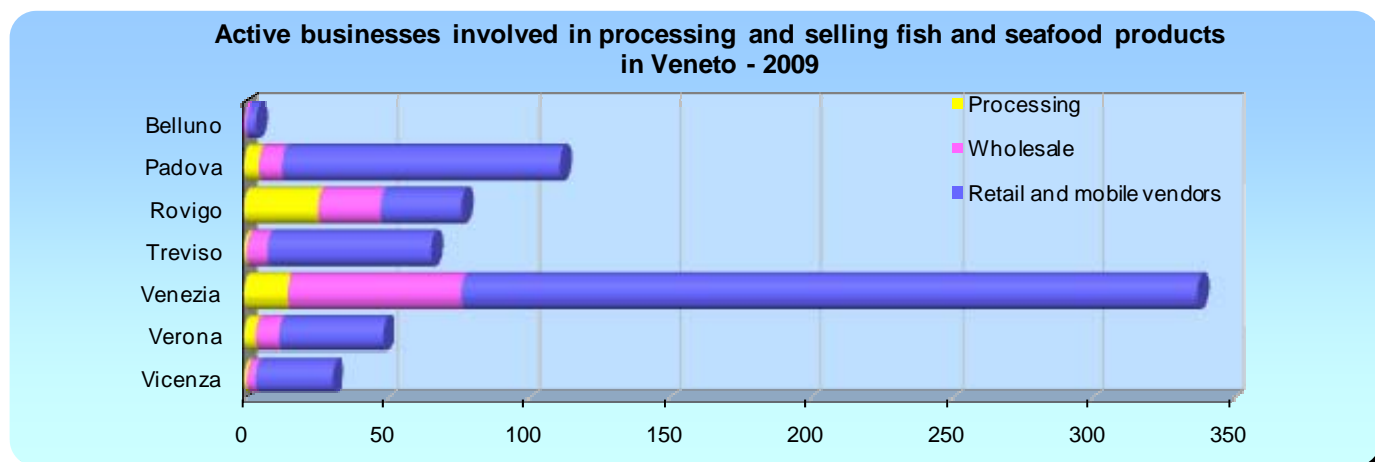
Data relating to businesses that are further down on the fish and seafood production chain was also analyzed. Starting with Emilia-Romagna, in 2009 there were 19 companies that processed fish, molluscs and crustaceans, located primarily in the provinces of Ferrara, Cesena, Parma and Rimini. There were 72 wholesale companies selling fish and seafood products, 226 retail businesses and 155 mobile vendors operating in the region.



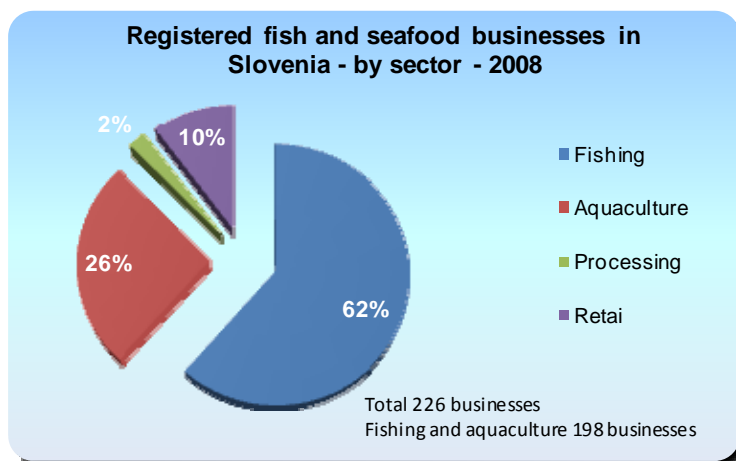
In Friuli Venezia Giulia, there were 9 fish and seafood processing companies in 2009, 6 of which were located in Udine. The number of wholesalers was 14, while there were 70 retail sellers with permanent establishments and 41 mobile vendors.



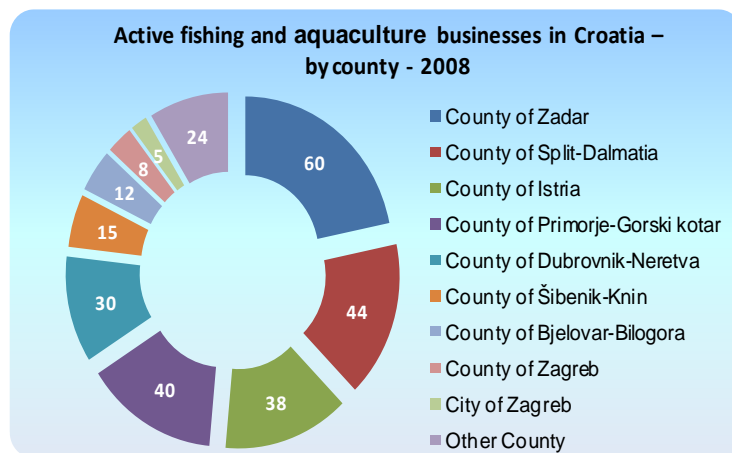
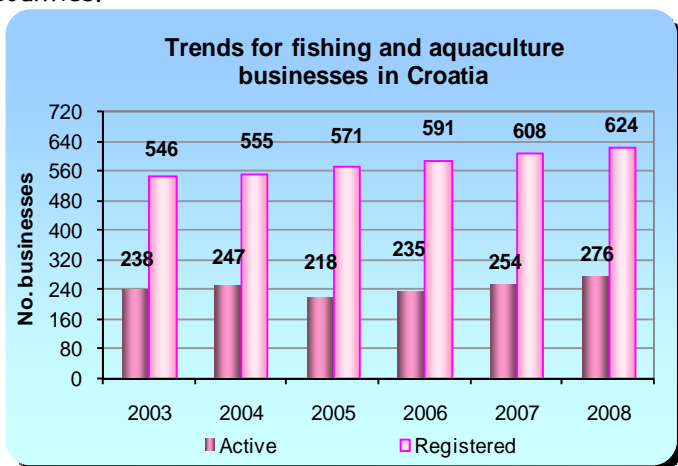
In Veneto there were 52 processing businesses in 2009, located primarily in Rovigo and Venice. The region had 111 wholesale companies, while the total number of retailers was 514, 305 of which were mobile vendors operating primarily in Venice and Padua.



Information regarding Slovenian companies operating in the fishing and aquaculture sectors is unavailable for the period 2003-2007; data collection resumed in 2008 and followed the new Nace Rev. 2 classification system. The number of companies operating in the sector increased from 158 in 2003 to 198 in 2008. The new classification system provides uniformity and allows direct comparisons to be made with data collected for Italian regions - thanks to this new system, it is apparent that there are 5 fish and seafood processing companies operating in Slovenia and 23 retail companies.



In 2008, there were 624 companies registered in Croatia, only 276 of which were active, an increase of 9% with respect to the previous year; a distinction is made between active companies, which by law are subject to a series of accounting and fiscal obligations, and those companies that are merely registered. The regional breakdown in the diagram shows that the active companies operate primarily in Zadar, Dalmatia, Istria and Primorje-Gorski kotar counties.



Source: Processed by the Socio Economic Observatory for Fishing and Aquaculture using data from Statistical Office of Slovenia and Central Bureau of Statistics of the Republic of Croatia



Reform of the Common Fisheries Policy:

In a plenary session on 25 February, the European Parliament will discuss the reform of the Common Fisheries Policy.

Priorities: increased responsibility for professionals, clear regulations to encourage good fishing practices, new harvest management plans and improving agreements with non-EU countries.

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Next issue:
Preliminary evaluations of the 2009 fishing year

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