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# National Fisheries Profile of Italy

A detailed social analysis of the Italian fishing sector

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# Sommario

# ITALIAN NATIONAL FISHERIES PROFILE

## A. Executive summary

The Italian fishing fleet has declined significantly over the last decade, with a 9,5% drop due to the economic crisis and the Common Fisheries Policy (CFP) measures. The largest vessels have been hardest hit, showing a decline in GT and kW. The average age of vessels is high, with an ageing and decreasing number of workers by 5%. Days at sea have decreased and the fleet shows structural weaknesses, especially in small-scale coastal fishing. The scarcity of organised sales systems and the decreasing contribution to national GDP are further challenges for the sector, together with the competition from imported fish products and compliance with strict regulations. However, there are significant opportunities, such as the growing demand for high quality and sustainable products, diversification of the product range, and the exploration of new markets. Producer Organisations and Interprofessional Organisations play a key role in strengthening bargaining power and promoting innovation. Finally, the promotion of high-quality seasonal products and the integration with the tourism sector can further enhance the value chain of the Italian seafood sector. Therefore, diversification of the product range and exploration of new markets, as well as collaboration with the different players carrying out economic activities in coastal communities, can help reduce dependence on traditional markets and improve the general conditions of the sector as a whole.

### A.1 General information

Italy's fisheries sector plays a significant role in both economic and social dimensions. Deeply rooted in the country’s cultural heritage, fisheries support coastal communities by maintaining artisanal fishing traditions and fostering family-run enterprises. Small-scale fisheries (SSF) using non-trawl gear constitute over 70% of the national fleet, yet they account for only 25% of the total value of landings. Their importance lies not in volume, but in preserving local knowledge, sustaining coastal economies, and supporting employment in remote areas with limited alternatives.

In 2021, Italian fishing production reached 137,067 tonnes, valued at €741.57 million, with slight declines linked to the impact of the COVID-19 pandemic. Despite this, Italy remains the leading fleet in the Mediterranean in terms of total revenues, which were estimated at over €1.5 billion in 2020. That same year, Gross Value Added (GVA) was €422 million, and gross profits reached €210 million. The sector employs a predominantly male workforce and still struggles with generational renewal, although initiatives to attract youth and women are increasing.

Fisheries communities are particularly concentrated in Liguria, Veneto, Apulia, Campania, Sicily, and Sardinia. These areas benefit from strong links between fisheries and tourism, infrastructure, cultural identity, and gastronomy. The sector's social role is prominent in artisanal fisheries, while large-scale trawlers (LSF) dominate economic output. Nevertheless, both contribute to a dynamic and fragmented supply chain with marked regional diversity.

## A.2 Fisheries sector structure

Italy's fishing fleet comprises 10,316 vessels distributed across different segments. While artisanal fisheries dominate in terms of numbers, large-scale trawlers generate most of the value. The sector's dualistic structure presents both opportunities and challenges: artisanal fleets are embedded in local economies and traditions, whereas industrial operations focus on volume and competitiveness.

The main fishing grounds include the Adriatic Sea, Tyrrhenian Sea, and Sicily Channel. Species of economic and ecological importance include anchovies, sardines, red mullet, hake, and deep-sea crustaceans such as red shrimp. Inshore activities target coastal and demersal species, while offshore operations engage in pelagic and deeper stocks.

The fisheries value chain includes primary and secondary processing, wholesale, retail, and logistics. Primary processing is often performed onboard or at coastal facilities. Secondary processing adds value and may occur in specialised centres. Fish products are then distributed via wholesale markets and auctions to national and international markets. Retail channels include fishmongers, supermarkets, restaurants, and online platforms. Storage and cold chain logistics play a critical role in maintaining product quality and marketability.

Technology has modernised operations, improved selectivity and reducing bycatch. Investment in less invasive techniques and customised gear has supported the resilience of local stocks and expanded marketing opportunities. Additionally, the COVID-19 pandemic accelerated digitisation, especially in distribution and consumer engagement. Meanwhile, climate change continues to affect fishing activity, product quality, and the presence of marine litter, all of which influence marketability.

## A.3 Governance system

Italy's fisheries governance is shaped by EU regulations, especially the Common Fisheries Policy (CFP), and participation in Regional Fisheries Management Organisations (RFMOs), particularly the GFCM and ICCAT. Nationally, the Ministry of Agriculture, Food Sovereignty and Forestry (MASAF), through its Directorate General for Maritime Fisheries and Aquaculture, holds the primary responsibility for fisheries management and policy.

Governance is implemented across three levels:

1) Central level: MASAF coordinates regulatory frameworks, develops policy, and ensures EU alignment.
2) Regional level: Italy's 20 administrative regions carry out limited yet important roles in implementing fisheries policies and coordinating with stakeholders.
3) Local level: Port Authorities oversee operational aspects such as docking and landings. They also ensure compliance with regulations. Local Fisheries Associations and cooperatives advocate for community interests and participate in policy discussions.

Artisanal Fisheries Management Consortia (Consorzi di Gestione Pesca Artigianale - Co.Ge.P.A[3].) and Clam Management Consortia (Co.Ge.Vo.) are key governance actors. Co.Ge.P.A., legally recognised since 1999, facilitate local management of small-scale fisheries through LMPs, which promote selective gear use, regulate access, define closed areas and seasons, and support professional training. Co.Ge.Vo., active since the 1990s, manage bivalve mollusc fisheries through area rotation, restocking, and closures, often in collaboration with POs and scientific institutions.

Further, Italy applies a General Permit System, individual quotas, and seasonal restrictions to ensure sustainable resource use. Regulations cover all aspects from commercial to recreational and bivalve fishing. Governance mechanisms support sustainability through shared planning, scientific collaboration, and multi-level integration, reinforcing Italy's commitment to the long-term viability of its fisheries resources.

Italy's governance model is a blend of top-down regulations and bottom-up initiatives, offering a comprehensive approach to manage environmental sustainability, economic performance, and the cultural importance of fisheries.

## A.4 Social, Cultural and Economic Aspects of Fisheries

Fisheries are central to Italian identity, tied to artisanal practices, gastronomy, and local economies. However, the sector faces reduced attractiveness for younger generations due to economic uncertainty and loss of traditional roles. Current dynamics are shaped by five major factors:

- Sustainability: Increasingly central to national policy, with shared management plans and selective fishing tools promoting responsible practices.
- Legislation: Multilevel regulatory instruments include:
    - General permits for licensing and compliance
    - Seasonal restrictions for critical species
    - Quotas and size limits
- Strict rules for juvenile and bivalve fisheries
- Regulation of sport fishing to preserve biodiversity
- Technology: Innovations have improved selectivity, quality, and sustainability. COVID-19 accelerated

[3] Source: Cautadella e M. Spagnolo. (2012). The state of Italian marine fisheries and aquaculture". The Ministry of Agriculture and Forestry. https://www.politicheagricole.it/flex/cm/pages/ServeAttachment.php/L/IT/D/d%252Ff%252F5%252FD.d400f62a0f179e8e6475/P/BLOB%3AID%3D6412/E/pdf?mode=download Chapter 10- pag, 367. "*The following circulars were issued in reference to the aforementioned decree: Circ. 23 December 2003 Application of the legislation on small-scale fisheries; Ministerial Decree 14 September 1999 and identification, under Article 2 of the same ministerial decree, of the actions permitted with the contributions referred to in Article 2, paragraph 6 of Law 164/1998; Circ. 3 August 2004 - Application of the legislation on small-scale fisheries; Ministerial Decree 14 September 1999 and identification, under Article 2 of the same ministerial decree, of the actions permitted with the contributions referred to in Article 2, paragraph 6 of Law 164/1998*".

digitization of the supply chain and market access. Modern practices also fostered collaboration among small producers.

- Globalization: Italian fleets operate in competitive international markets. While DWFs engage in global trade, 70% of vessels are SSFs, typically family-operated and less internationally competitive.
- Climate Change: Environmental stressors such as warming waters, acidification, and altered species migration affect catch quality and productivity. Storm events increase marine litter, degrading product value.

Despite ongoing challenges, Italy's fisheries sector remains vital for coastal resilience, with new opportunities emerging through sustainability, innovation, and integrated development strategies.

# B. Methods and data

This national profile combines primary, secondary sources and expert knowledge. The current NFP has been written on the basis of consultation of the following sources:

- Official fisheries data from the Italian Ministry of Agriculture, Food Sovereignity and Forestry (MASAF).
- Economic and social data from the fisheries sector collected under the EU Data Collection Framework.
- General data from the National Statistics Institute (ISTAT).
- Import and export data from Eurostat and EUMOFA.
- STECF reports on the economic and social aspects.
- GFMC stock assessment reports.
- Scientific publications.
- Grey literature.

In this report, we have used a dot to indicate thousands, and a comma for decimals. Since the Italian fishing sector is heterogeneous and needed to describe the many nuances that characterise it, the NFP turned out to be an organic document, but decidedly oversized compared to the initial objective of providing a more concise snapshot of the fishing context.

## 1. General description of the society

According to the National Institute of Statistics (ISTAT), in 2022 Italy's population exceeded 58,9 million, positioning it as the third most populous country in the EU and the 25th globally[4].

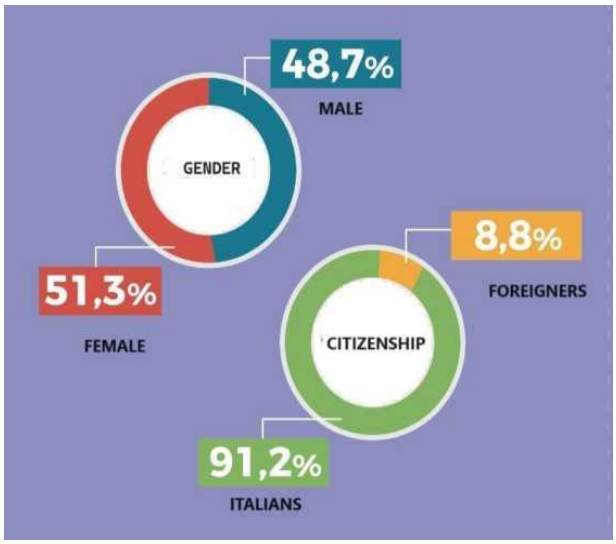
[4] Statistiche demografiche Italia - Grafici su dati ISTAT. https://www.tuttitalia.it/statistiche/

*Figure 1 Italy according to the main demographic indicators*


***Source**: Authors' elaboration based on Map, GISCO, 2022. European Commission. Demographic and economic data Demographic statistics. https://demo.istat.it/, reference year 2022.*

According to ISTAT distribution of the Italian population by eco region, in 2023 a 43,4% of the whole population resides in coastal regions, which cover a 37,7% of the peninsula's surface. Italy plays a barycentric role in the Mediterranean, and its 58,9 million residents are largely Italian, predominantly female (Figure 2) and rather elderly.

*Figure 2 Distribution of resident population by gender and nationality.*




***Source**: Adapted by authors on ISTAT data https://www.istat.it/it/archivio/269677*

In fact, the average age of Italians is 46 years and about 40 per cent are outside the labour either because they are too young or because they are of retirement age, and about 20.000 are ove centenarians.

The Italian age pyramid highlights, indeed, the phenomenon of an ageing population with a significant proportion over the age of 65. Indeed, in 2022, 12,5% of the population was less than 15 years old and 23,7% over 65. These figures are closely related to the national birth rate, which is one of the lowest in the world, averaging 1,22 births per woman. The current demographic trend is closely linked to the country's low birth rate, attributed to factors such as a declining number of women of childbearing age and challenges faced by

employed women in balancing work and family life. More than 63% of Italians are in employable age and the highest occupational classes include people aged 35-65, therefore an adult age population. In overall labour market conditions, male employment predominates significantly, while the total inactivity rate is rather high at over 35 %, with mainly women being the inactive ones. The labour market dynamics showed a post-Covid recovery led to a record growth of 23,7 million employed[5]. Unemployment reached 9,1% in 2022[6], this is the share of people who, despite being able to work (between 15 and 64 years old), did not find a job. However, this hides critical issues: the 15– 34-year-olds have decreased by 360 thousand in 10 years (2012-2022), while the over 50s have grown by 2,7 million. A further 12,4 million people, mainly women (around 8 million of working age), are not working and are not looking for a permanent position. The distribution of the population by educational qualification shows various nuances. Here are some of the most relevant ones: i) 16% of the population have only a primary school license or no educational qualification at all. ii) 29,5% of people have a secondary school diploma. iii) 35,6% of the population has a secondary school diploma or a vocational qualification. iv) 13,9% of people have a university degree or a diploma of higher artistic, musical and dance education.) 4,6% of the population are illiterate and literate without any educational qualification. Moreover, it emerges that, in the OECD area, Italy has the highest percentage of adults of employable age (25-64) who only hold a secondary school diploma[7]. On average in the OECD area, the proportion of graduated people has grown by 10%, (from 34% to 44%), while in Italy the growth was 8%[8]. The situation worsens if PhDs are considered: they account for between 0,3% in the South and 0,6% in the Centre[9]. The most critical percentages of low education or total absence of a school certificate were scored in the South, where people without any qualification being 5,9%[10]. Italian women have higher levels of education than men, with 65,3% having at least a diploma (60% among men) and 23% having a degree (17% among men). However, despite this educational advantage, women remain disadvantaged on the employment front, with a female employment rate of 56% compared to 76% for men. The gap narrows, however, as the level of education increases[11]. Moreover, female employment rates increase more significantly than male employment rates as education levels increase[12].

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[5] IL SENSO DEL LAVORO NELLA COMUNITÀ PRODUTTIVA E URBANA DI BOLOGNA. Rapporto di ricerca Bologna, 2024. https://www.censis.it/lavoro/il-lavoro-nella-vita-delle-persone-cambia-la-relazione-con-il-tempo-il-reddito-e-i-propri

[6] ISTAT, 2023. https://www.istat.it/it/archivio/occupati+e+disoccupati#:~:text=A%20dicembre%202023%20occupazione%20ancora,%25%20(%2D0%2C2%20p.p.)

[7] ITALIAN STATISTICAL YEARBOOK 2022 , Chapter 7 available at the followed link: https://www.istat.it/storage/ASI/2022/capitoli/C07.pdf ISBN 978-88-458-2090-86 (electronic) (Verified on Feb.2024).

[8] ISTAT (2021) data collection Popolazione 15 anni e oltre per titolo di studio - regolamento precedente (fino al 2020) (istat.it) (Verified on Feb. 2024).

[9] ISTAT (2022) Report: In the south of Italy, employment is also lower among university graduates, especially if they are less than 35 years old. Livelli di istruzione e ritorni occupazionali - Anno 2021 (istat.it)

[10] Data online (2023) on Titolo di studio: il 33% ha la licenza media, analfabeti al 4,6% (truenumbers.it). (Verified on Feb.2024).

[11] Cfr Note 10 (ISTAT, 2022). around 32 points for low qualifications, 20 points for medium and 7 points for high qualifications

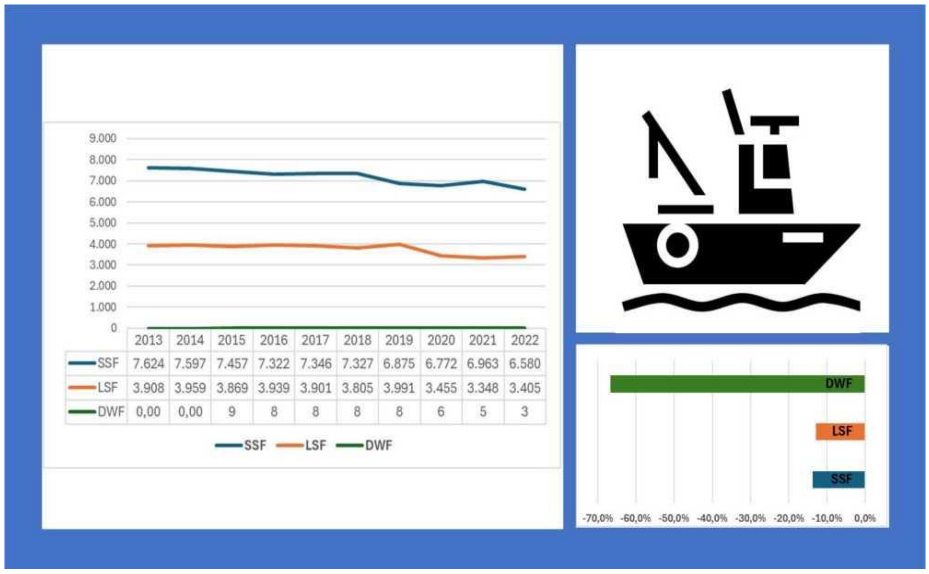
[12] For example, there is a difference of 19 points between female university graduates and female high school graduates (6 points among men) and 25,5 points between female high school graduates and women with only lower secondary education (14,1 points among men). Cfr. Note11: ISTAT (2022) Report: In the south of Italy, employment is

# 2. Fisheries sector-structure

## 2.1 General overview

Italy's geographic position in the heart of the Mediterranean, with over 8,000 km of coastline, has shaped a strong maritime identity and longstanding dependence on marine activities. The Italian fleet is notably diverse, characterized by a wide range of fishing techniques and gears tailored to local species and environments. This diversity has fostered continuous gear innovation and contributed to the heterogeneous commercial value of landings. The sector is dominated by small-scale fisheries (SSF), which account for over 65% of active vessels. Despite a 23% reduction in boat numbers since 2020 (STECF 23-07), SSF remains socially significant, with a prevalence of self-employed workers, often family-run, contributing both onboard and onshore. Large-scale fisheries (LSF) represent about 34% of the fleet and typically involve formal employment contracts governed by collective agreements. Italy also maintains a small distant-water fleet (DWF), though data for this segment remain confidential due to its limited size. Over the past 18 years, the Italian fleet has steadily contracted in terms of vessel numbers, gross tonnage (GT), and engine power (kW), particularly in the DWF segment (-67%). This trend is driven by the Common Fisheries Policy (CFP), which has encouraged permanent vessel decommissioning (Figure 3).

*Figure 3 Trend of number of vessels per segment, 2013-2022*




| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|---|---|---|---|
| SSF | 7.624 | 7.597 | 7.457 | 7.322 | 7.346 | 7.327 | 6.875 | 6.772 | 6.963 | 6.580 |
| LSF | 3.908 | 3.959 | 3.869 | 3.939 | 3.901 | 3.805 | 3.991 | 3.455 | 3.348 | 3.405 |
| DWF | 0,00 | 0,00 | 9 | 8 | 8 | 8 | 8 | 6 | 5 | 3 |

**Source**: Authors' elaboration according to Report STECF 23-07.

Italy plays a leading role in the Mediterranean fisheries sector. In 2021, it represented 33% of the EU's Mediterranean fleet by vessel count and 34% of total days at sea. It also led in landings, accounting for 41.5% by volume and 50.6% by value. Italy generated 48% of revenue, 61% of gross value added (GVA), and 33% of gross profit in the region (STECF 23-07).

also lower among university graduates, especially if they are less than 35 years old. Livelli di istruzione e ritorni occupazionali - Anno 2021 (istat.it).

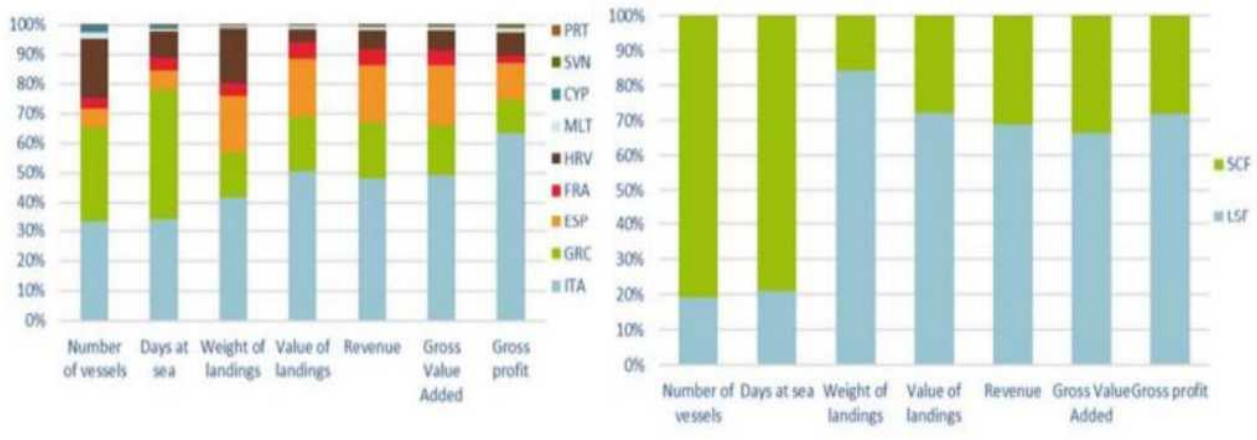
In 2022, total Italian landings reached 125,839 tonnes, valued at EUR 740 million. Bottom trawling, including the *rapido segment*, was the most significant method, contributing 36,875 tonnes (29.3%) and EUR 318.5 million (43% of revenue). Mid-water pair trawling followed with 23,000 tonnes (19%) and EUR 70 million (9.5%). These figures reflect the high economic value of species such as red prawns and Norway lobsters.

Despite reductions in fleet size and fishing effort, Italy continues to employ around 20,862 individuals in the sector, equating to 14,875 full-time jobs. SSF accounts for 47% of these roles. Between 2013 and 2021, total employment and FTEs declined by 18% and 23%, respectively. However, GVA per full-time job increased by 7% during the same period (STECF 23-07). By species, shrimps ranked highest in economic value (approx. EUR 125 million), while anchovies led in volume with around 24,000 tonnes (EUMOFA, 2023). The fleet contraction from 2004 to 2022 can be split into two phases: a 15% decrease from 2004–2012, followed by a slower 5% reduction between 2013–2022. Overall, the fleet declined by 12.7% in GT and 9.3% in kW, reflecting the withdrawal of larger, more powerful vessels. The structure of fishing segments by gear type in 2022 remained largely consistent with the previous year, maintaining the overall balance between SSF and LSF activities.

## 2.2 Summary of Fleets

The Italian fishing fleet in 2021 consisted of 23 fleet segments and 10,311 active vessels. Small-Scale Fisheries (SSF) represented nearly 67% of the total, with 6,963 vessels. Italy is the leading contributor to the EU Mediterranean SSF, accounting for 33% of its vessels (Figure 4).

*Figure 4 Share of Member States fleets and fisheries in the Mediterranean Basin, 2021.*




***Source**: Report STECF 23-07.*

The SSF generated EUR 172 million in landings value (23% of the national total), and employed 9,870 individuals (47% of the fisheries workforce), including approximately 2,000 unpaid workers. Most SSF vessels range from 6–12 meters and are concentrated in Sicily, Sardinia, and Campania. Despite lower productivity (EUR 21,000 GVA/FTE versus EUR 30,000 national average), the segment recorded its best performance since

2018 with increases in sea days (+36%), landings (+3% in volume, +14% in value), and net income (EUR 47 million).

The Large-Scale Fleet (LSF) included 3,348 vessels (32% of total), accounting for 84% of total landings volume and 72% of value. It also held 77% of gross tonnage and 67% of total engine power. The LSF employed 10,992 people, 6% of whom were unpaid. From 2013 to 2021, vessel numbers declined by 13%, and fishing days by 21%, contributing to a 24% drop in landing volume and 19% in value.

Towed gear fleets (DTS, TBB) comprised 2,045 vessels (17.35%), representing 59.16% of gross tonnage and 46.49% of engine power. Hydraulic dredgers (DRB) numbered 715 vessels (6.63% of GT; 8.39% of kW). Purse seiners (PS) included 362 vessels (5.22% of GT), while longliners (HOK) accounted for 207 vessels (1.75% of the fleet; 3.47% of GT).

The SSF segment generated a production value of EUR 172 million in 2021 (23% of total national landings value), employing 9,870 individuals (47% of total fisheries workforce), of which approximately 2,000 were unpaid workers, often vessel owners. Most SSF vessels range from 6–12 metres and are concentrated in Sicily, Sardinia, and Campania. Economic performance improved in 2021, with a 36% increase in activity days at sea, a 3% increase in landing volumes, and a 14% rise in value. Net income reached EUR 47 million. However, SSF remains below national average in productivity: GVA per full-time equivalent was EUR 21,000 compared to EUR 30,000, and revenue per vessel was around EUR 19,000.

The LSF comprises 3,348 vessels (32% of the total), contributing 84% of the landed weight and 72% of its value in 2021. The LSF accounts for 77% of gross tonnage and 67% of total engine power, employing 10,992 workers (6% unpaid). Between 2013 and 2021, LSF vessel numbers dropped by 13% and fishing days by 21%, reflecting effort reduction policies. Consequently, landings declined by 24% in volume and 19% in value compared to the 2013–2020 average.

Fleet types using towed gears (DTS, TBB) comprise 2,045 vessels (17.35%) and account for 59.16% of national gross tonnage and 46.49% of engine power. Hydraulic dredgers (DRB) include 715 vessels, contributing 6.63% of GT and 8.39% of kW. Purse seiners (PS) are 362 vessels (5.22% of GT), while longliners (HOK) include 207 vessels, representing 1.75% of the fleet and 3.47% of GT.

### *2.2.1 Description of fleet segments and practices*

Italy's fishing fleet is composed of highly diversified segments, each with distinct gear types, target species, and operational patterns. Small-Scale Coastal Fisheries (SSF), which rely on passive gear like nets, pots, traps, and longlines, form the majority of the fleet and support local markets despite lower efficiency. Demersal trawlers, categorized by vessel size (12–18 m and 18–24 m), target high-value species like rose shrimp and hake, employing significant numbers and generating strong economic returns. Hooks-based vessels operate mainly in the Tyrrhenian and Ionian Seas, targeting swordfish and tuna, though with modest profitability. The Distant-Water Fleet, consisting of only a few vessels operating in the Indian Ocean and Central Atlantic, targets various species, but detailed socio-economic data are unavailable.

*Table 1: Italian fleet segmentation*

| Segment | Vessels | Key Species | Main Gears | Employment (FTEs) | Landing Value (€M) | Net Profit (€) | Notes |
|---|---|---|---|---|---|---|---|
| **SSF** | 6,963 (67% of fleet) | Cuttlefish, Octopus, Swordfish, Hake, Mullet, Mantis shrimp | Trammel nets, Gillnets, Pots, Traps, Longlines | ~9,870 (47% of workforce) | 172 (23% of national total) | 47M net income | Mostly local sales, low productivity, strong presence in Sicily, Sardinia, Campania |
| **Demersal Trawlers (12–18 m)** | 1,022 | Rose shrimp, Hake, Cuttlefish, Lobster | Bottom trawls | 2,543 | 105 | 13M | 6% decline from 2020, still profitable |
| **Demersal Trawlers (18–24 m)** | 550 | Rose shrimp, Hake, Red mullet | Bottom trawls | 1,987 | 124 | 4M | 10% increase in value from 2020 |
| **Hooks (12–18 m)** | 149 | Swordfish, Bluefin tuna, Hake | Hooks, Longlines | 313 | 9 | 446,013 | Low profitability, operates in GSA 10 and 19 |
| **DWF** | 5 | Various (confidential data) | Purse seine, Trawls | Confidential | Confidential | Confidential | Operates in FAO Areas 51_7 and 34_3 |

Fishing practices vary considerably by Geographical Sub-Area (GSA), reflecting local traditions, seasonal cycles, and species availability. GSA 17 in the Northern Adriatic is known for pelagic trawlers, hydraulic dredgers, and traps; GSA 16 (Strait of Sicily) for demersal trawlers and purse seiners; GSA 10 (Southern Tyrrhenian Sea) for tuna and small pelagics, including artisanal "cannizzi" techniques; and GSA 19 (Ionian Sea) for drifting longlines targeting large pelagics. These patterns strongly influence labour organization, vessel structure, and regional economic dynamics.

*Table 2: Main fishing practices by GSA*

| GSA | Main Practices |
|---|---|
| **GSA 17 (Northern Adriatic)** | Pelagic trawlers for anchovy and sardine; Hydraulic dredgers for clams; Rapido trawlers for sole; Traps for mantis shrimp; Fyke nets for demersal fish |
| **GSA 16 (Strait of Sicily)** | Purse seiners for anchovy and sardine (Sciacca); Demersal trawlers for rose shrimp and giant red shrimp (Mazara del Vallo) |
| **GSA 10 (Southern Tyrrhenian Sea)** | Purse seiners for small pelagics and tuna (Cetara); Set longliners for hake and swordfish; Handlines and gillnets for squid (Aeolian Islands); Cannizzi technique for dolphinfish (lampuga) |
| **GSA 19 (Ionian Sea)** | Drifting longlines for large pelagics (albacore, swordfish) |

### 2.2.2 Areas at sea

Marine waters represent 66,1% of the total country's area (land & marine), covering 587.155 km² divided into three sea basins (Figure 5): Adriatic Sea (62.142 km²), Ionian Sea and Central Mediterranean Sea (214.475 km²) and Western Mediterranean Sea (310.538 km²) [13]. Internal waters (to the baselines) cover a total area of 39.339 km², while the territorial sea (12 nautical miles zone) covers an area of 81.528 km² (including 4.330 km² islands, not included in water areas)[14] [15].

[13] https://water.europa.eu/marine/countries-and-regional-seas/country-profiles/Italy, accessed on 16/12/2023.
[14] https://maritime-spatial-planning.ec.europa.eu/countries/Italy and Maritime Spatial Planning Country Profile - Italy, April 2023.
[15] '*This map was compiled from different international sources such as EMODnet, EEA or Marine Regions.*

*Figure 5 Italian Marine spatial planning.*


**Source**: MSP Platform, 2023[32]

Italy is a peninsula in the middle part of the Mediterranean, a position which gives this country a pivotal role among MS operating in this basin. Indeed, as reporte in Figure 4in previous section, its fleet is one of the main contributors in terms of number of vessels operating in this area (33%), days-at-sea (34%) and its fleet is dominant in terms of landings (41,5% in weight and 50,6% in value), revenue (48%), gross value added (61%) and gross profit (33%)[16]. Maritime jurisdiction in the Mediterranean is very complex due to its geographical structure characterized by the presence of more than 5.000 islands and islets (most of which are less than 10 km²), many bays and peninsulas, and by its nature of semi-closed sea (UNCLOS, Art. 122) where three different continents meet[17]. In this basin, the definition of the Exclusive Economic Zone (EEZ) of each coastal State requires *ad hoc* agreements among involved countries (UNCLOS, Art. 74), and their collaboration, pending the accepted delimitation[18], not to jeopardize or hinder the achievement of the final agreement (UNCLOS Articles n° 74, 123 and 300). Moreover, everywhere in the Mediterranean, the distance between 2 coastal States (continent or island) doesn't overtake 400 nautical miles from their respective territorial sea baseline, with a possible overlapping of the EEZ of different States. This makes the management of common fishing grounds very difficult. Consequently, some States established fisheries protection zones (FPZ) and ecological protection

*Information obtained from these sources was cross-checked with data from national sources. While compilation was carried out by the European MSP Platform, validation and quality assurance remain the responsibility of the primary data sources*'. Source: https://maritime-spatial-planning.ec.europa.eu/countries/Italy, accessed on 16/12/2023.

[16] STECF 23-07, p. 141

[17] EUROPEAN PARLIAMENT, Directorate-General for Internal Policies, *Jurisdictional Waters in the Mediterranean and Black Seas*, Brussels, December 2009, IP/B/PECH/IC/2009-087, PE 431.602, pp. 17-30.

[18] D. MUSMECI, *L'incidenza della proclamazione della zona economica esclusiva italiana sulle attività di pesca nel Mediterraneo*, in A. CALIGIURI, I. PAPANICOLOPULU, L. SCHIANO DI PEPE, R. VIRZO, *Italia e diritto del Mare*, Chaiers de l'Association internationale du droit de la mer, Napoli, 2023, pp. 83-98.

zones (EPZ): areas in which the coastal state exercises only partially its EEZ rights and duties to manage its fisheries resources or to protect the environment while leaving the other aspects to the high seas' rules[19]. Italy adopted its EPZ discipline in 2006[20] and established its EPZ in 2011[21]. More recently, in 2021, the Country has adopted a law[22] to authorize its competent entities to establish the national EEZ[23] . However, the exact limits of its EEZ are still not defined since, so far, an accord to determine the limits of respective EEZ has been concluded only with Croatia (24 May 2022). In addition, the boundaries established in the agreement of 1977 with Greece, for the delimitation of the continental platform, have been already recognized as valid in the agreement of 2020 for the delimitation of each party's maritime zones and constitute the base for the future establishment of their EEZ (Figure 6). Nevertheless, some delimitations of the continental shelf have been fixed[24] with Spain (1974); Tunisia (1971); Malta (a provisional agreement concerning the Northern boundary of Malta – 1970); and Albania (1992). Other agreements exist for the determination of maritime boundaries with France (1986: about the territorial seas between Sardinia and Corsica; 2015: agreement for the delimitation of all maritime spaces between the 2 Parties but it is not yet in force) and Slovenia (1975: definition of respective territorial seas). It remains to be seen whether the boundaries established in these agreements will be considered for the delimitation of the Country's EEZ (like in the cases of Greece and Croatia) and how, in line with the provisions of UNCLOS, the Italian EEZ will be coordinated with the already existing EEZ in the central Mediterranean[25].

[19] F. CAFFIO, Glossario di Diritto del Mare. Diritto e Geopolitica del Mediterraneo allargato, Rivista Marittima, Roma 2020, pp. 104 and 143.
[20] Law 8 February 2006, no. 61.
[21] D.P.R. 27 October 2011, no. 209. See, MARINA MILITARE, FONDAZIONE LEONARDO, Rapporto 'Civiltà del mare. Geopolitica, strategia, interessi nel mondo subacqueo. Il ruolo dell'Italia', 2023, pp. 73-74.
[22] Law 14th June 2021, no. 91, published in Official Journal no.148 dated 23-06-2021.
[23] G. CATALDI, La legge che autorizza la creazione di una ZEE italiana, in A. CALIGIURI, I. PAPANICOLOPULU, L. SCHIANO DI PEPE, R. VIRZO, Italia e diritto del Mare, Chaiers de l'Association internationale du droit de la mer, Napoli, 2023, pp. 65-82.
[24] T. SCOVAZZI, Breve rassegna sui confini marittimi dell'Italia, in A. CALIGIURI, I. PAPANICOLOPULU, L. SCHIANO DI PEPE, R. VIRZO, Italia e diritto del Mare, Chaiers de l'Association internationale du droit de la mer, Napoli, 2023.
[25] F. CAFFIO, I confini marittimi italiani nella loro prospettiva storica: i casi di Tunisia, Malta, Libia, in A. CALIGIURI, I. PAPANICOLOPULU, L. SCHIANO DI PEPE, R. VIRZO, Italia e diritto del Mare, Chaiers de l'Association internationale du droit de la mer, Napoli, 2023, pp. 62-64.

Figure 6 Hypothesis of delimitation of the Italian EEZ


***Source**: Limes-2021, extracted from the MASAF/Comando Generale delle Capitanerie di PortoGuardia Costiera, Controllo pesca. Rapporto 2022, p. 43.*

### *2.2.3 Fishing areas*

A quick look at the position of Italy with reference to EU waters clearly shows its centrality in the Mediterranean basin (Figure 7). This paragraph gives a brief overview of Italy's geographical and strategic importance in the area. Moreover, Italy's position makes it a bridge between Europe, Africa and the Middle East, and a leader in regional cooperation.

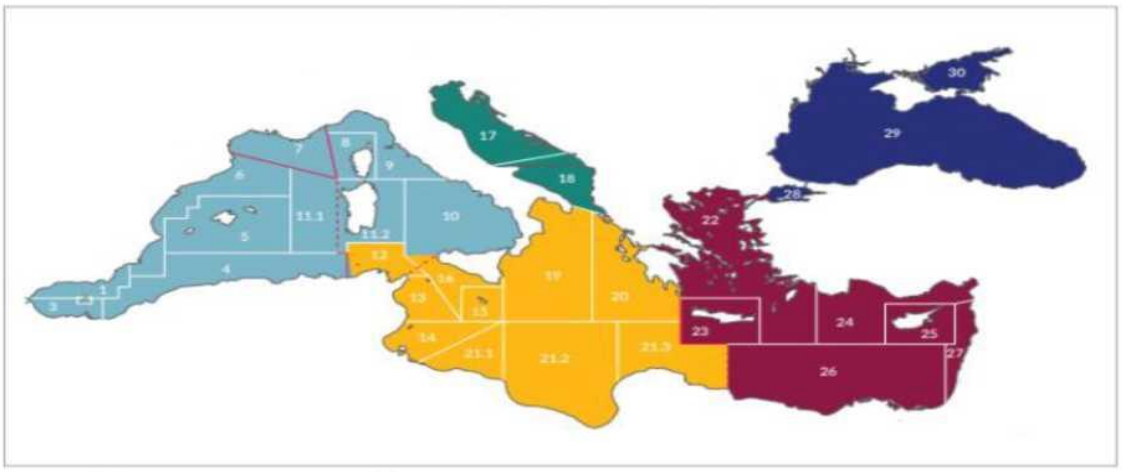
*Figure 7 Sub-areas and Divisions of FAO fishing areas GSA27 and GSA37*


***Source**: https://oceans-and-fisheries.ec.europa.eu/system/files/2016-09/fishing_areas_en.pdf*

Italy has been a contracting party since May 1951 of the General Fisheries Commission for the Mediterranean[24] (GFCM), the competent RFMO for the Mediterranean and the Black Sea. According to GFCM, the Mediterranean waters area divided into five subregions and 30 geographical subareas (GSAs) (Figure 8).

*Figure 8 GFCM area of Application.*

[24] https://www.fao.org/3/ax817e/ax817e.pdf




| | | | | |
|---|---|---|---|---|
| 01. Northern Alboran Sea | 07. Gulf of Lion | 13. Gulf of Hammamet | 19. Western Ionian Sea | 25. Cyprus |
| 02. Alboran Island | 08. Corsica | 14. Gulf of Gabès | 20. Eastern Ionian Sea | 26. Southern Levant Sea |
| 03. Southern Alboran Sea | 09. Ligurian Sea and northern Tyrrhenian Sea | 15. Malta | 21.1. Southwestern Ionian Sea<br>21.2. Southern Ionian Sea<br>21.3. Southeastern Ionian Sea | 27. Eastern Levant Sea |
| 04. Algeria | 10. Southern and central Tyrrhenian Sea | 16. Southern Sicily | 22. Aegean Sea | 28. Marmara Sea |
| 05. Balearic Islands | 11.1. Western Sardinia<br>11.2. Eastern Sardinia | 17. Northern Adriatic Sea | 23. Crete | 29. Black Sea |
| 06. Northern Spain | 12. Northern Tunisia | 18. Southern Adriatic Sea | 24. Northern Levant Sea | 30. Azov Sea |

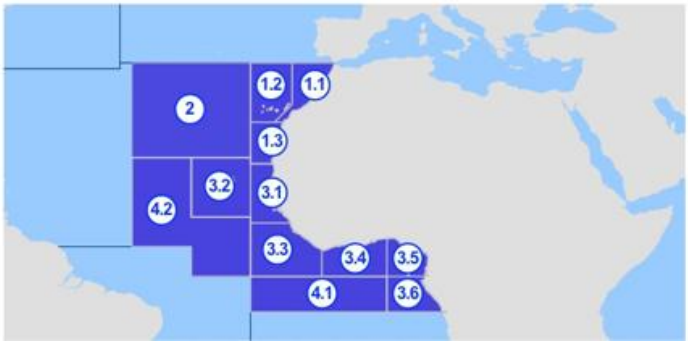
***Source**: GFCM Data Collection Reference Framework, Version 23.2*

Relevant FAO fishing areas for Italian seas are the Western Mediterranean (37.1), Division 37.1.3 (Sardinia), and the Central Mediterranean (37.2), Divisions 37.2.1 (Adriatic) and 37.2.2 (Ionian) with the related GSAs. In addition to Mediterranean waters, according to the sources consulted[25], Italy has also a distant water fleet (DWF): specifically, 5 vessels operating outside the Mediterranea area, representing the so-called oceanic fleet, fishing in the Eastern Central Atlantic (4) and in the Western Indian Ocean (1).

*Figure 9 Distant water fishing areas for the Italian fleet*

[25] CREA, Annuario dell'agricoltura italiana 2022- Volume LXXVI, Roma, 2023, p. 319.

Area 34 – Atlantic, Eastern Central



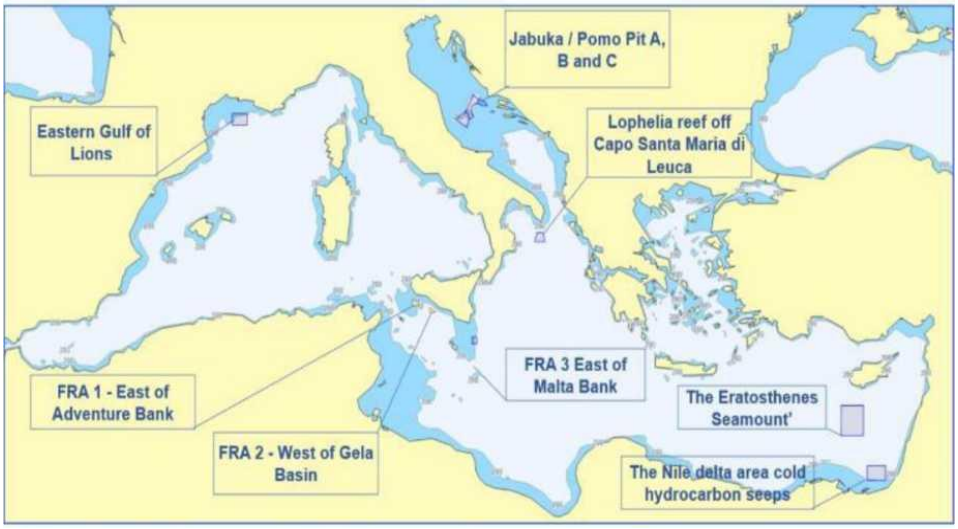

Area 51 – Indian Ocean, Western


## 2.3 Geographic areas

Detailed rules for certain species divided by GSAs have been adopted by the Union to respect the conservation, management, exploitation, monitoring, marketing and enforcement measures for fishery and aquaculture products established by GFCM[26]. In particular, to protect nursery areas, some Fisheries Restricted Areas (FRAs) have been established[27] and monitoring programs have already shown good results in terms of priority species abundance and size[28]. In particular, Italy plays an important role in six of the FRAs established by the GFCM[29]: namely in the Jabuka/Pomo Pit (GSA 17) shared between Italy and Croatia, in the Bari Canyon FRA (GSA 18), the Lophelia reef off Capo Santa Maria di Leuca (GSA 19) and in those of the Strait of Sicily (GSA16): East of Adventure Bank, West of Gela Basin and East of Malta Bank. The Jabuka/Pomo Pit is considered an example of best practice in transnational cooperation and the involvement of fishers in the implementation of spatial management measures[30]. In the Bari Canyon FRA only the Italian fleet operates[31], specifically in its B zone (Bari FRA Buffer) where fishing activities are allowed to authorized vessels subject to specific restrictions, while in the A Zone (Bari FRA Core) fishing is prohibited[32].

[26] REGULATION (EU) 2023/2124 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 4 October 2023 on certain provisions for fishing in the General Fisheries Commission for the Mediterranean (GFCM) Agreement area (recast).
[27] STECF 22-06, p. 135.
[28] STECF 23-07, p. 262.
[29] https://www.fao.org/gfcm/data/maps/fras/en/
[30] STECF 23-07, p. 149.
[31] GFCM 2023, p. 3.
[32] Ministero dell'Agricoltura, della Sovranità alimentare e delle Foreste, Decreto Dirigenziale n. 0120653 del 23/02/2023.

*Figure 10 FRAs established by the GFCM.*




***Source**: MASAF/Comando Generale delle Capitanerie di Porto-Guardia Costiera (Controllo pesca. Rapporto 2022) based on EFCA –IMS screenshot.*

In addition, Italy has currently 29 Marine Protected Areas (MPA) and 2 underwater protecting parks for a total of about 228.000 hectares of sea and about 700 kilometers of coastline. There is also the International Marine Mammal Sanctuary, known as the Cetacean Sanctuary[33]. In general, in each MPA there are 3 different levels of protection: 1) Zone A, is the integral protection zone in which all activities that may cause damage or disturbance to the marine environment are prohibited in order to protect nurseries or endangered animal and plant species; 2) Zone B, is usually subject to authorization activities that are compatible with a sustainable use of the environment; 3) Zone C, is a partial reserve, constituting a buffer strip between the more protected areas and the outer sea[34].

To reduce the fishing pressure for key species several multi-annual management plans (together with the landing obligation) have been elaborated for the considered area. For the Western Mediterranean, a multiannual plan for demersal stocks has been adopted in June 2019[35] establishing temporal and permanent closures of fishing areas and a reduction of trawling fishing effort by 7% in 2022[36]. Another multiannual plan has been elaborated by the GFCM for small pelagic stocks and key demersal stock in the Adriatic Sea (GFCM/44/2021/20 and GFCM/44/2021/1)[37]. Consequently, fishing opportunities have been fixed for each following year. To give an idea of the contribution of fishing areas to the overall fisheries production of the

[33] https://www.mase.gov.it/pagina/aree-marine-istituite, accessed 13.01.2024
[34] M. VIOLA, *Incanto nel blu. Le Aree marine protette dove la natura trionfa*, All Around Srl/Comando generale Corpo Capitanerie di porto-Guardia Costiera, 202, pp. 48-49.
[35] REGULATION (EU) 2019/1022 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 20 June 2019 establishing a multiannual plan for the fisheries exploiting demersal stocks in the western Mediterranean Sea and amending Regulation (EU) No 508/2014.
[36] STECF 23-07, p. 148.
[37] STECF 23-07, p. 148.

Italian fleetm in table 1 total captures and related revenues related to the year 2022 are reported by GSAs, while more details, in terms of species and gears by GSAs are reported in the next sub-paragraph.

*Table 3*: Italian captures and revenues divided by GSA –Year 2022

| GSA | CAPTURES (tonnes) | CAPTURES % | REVENUES (million EUR ) | REVENUES % |
|---|---|---|---|---|
| **Ligurian and Northern Tyrrhenian Sea (GSA 9)** | 12.392,82 | 10 | 90.067.338,61 | 12,16 |
| **Southern and Central Tyrrhenian Sea (GSA 10)** | 13.044,14 | 10 | 84.686.105,06 | 11,44 |
| **Western and Eastern Sardinia (GSA 11)** | 5.363,47 | 4 | 43.232.694,56 | 5,84 |
| **Southern Sicily (GSA 16)** | 13.402,11 | 11 | 115.742.155,70 | 15,63 |
| **Northern Adriatic Sea (GSA 17)** | 64.756,67 | 51 | 288.787.567,87 | 39,00 |
| **Southern Adriatic Sea (GSA 18)** | 9.960,69 | 8 | 71.899.145,88 | 9,71 |
| **Western Ionian Sea (GSA 19)** | 6.919,28 | 6 | 46.093.682,15 | 6,22 |
| **TOTAL** | 125.839,18 | 100,0 | 740.508.689,83 | 100,0 |

**Source**: Adapted from MASAF, 2023

### *2.3.1 Western Mediterranean*

GSA 9: Ligurian and Northern Tyrrhenian Sea: GSA 9 extends over 42.410 km² and includes the Ligurian Sea and the central-northern Tyrrhenian Sea, the total area covers 1.245 Km of coastline (Liguria, Tuscany and part of Lazio). In particular, the Ligurian Sea is one of the most important places of water transformation during winter as a result of the action of cold, dry continental winds. Thanks to the presence of peculiar habitats which contribute to the creation of nursery areas for different species, it is also characterized by a high concentration of juvenile forms of fish species like *M. merluccius*, *M. barbatus*, *N. norvegicus*, *P. longirostris* and *E. cirrhosa*, mainly in the centre of the GSA along the coasts of Tuscany[38]. In GSA 9 there are two Biological Protection Zones (ZTB), albeit small in size, located within important nursery areas (in front of Lazio coast and in the

[38] P. Maiorano, R. Sabatella, L. Labanchi, F. Fiorentino (eds), *Annuario sullo stato delle risorse e sulle strutture produttive dei mari italiani*, 2022, 226 pp.

area of Argentario). In this area management plans[39] have been elaborated for several species (Hake - *Merluccius merluccius*, Pink or white shrimp - *Parapenaeus longirostris*, Mud mullet - *Mullus barbatus*, Red mullet - *Mullus surmuletus*, Norway lobster - *Nephrops norvegicus*) to rebuild exploited fish stocks by gradually reducing fishing pressure, both in terms of capacity and activity, and by introducing technical measures.

In 2022, the total number of fishing vessels belonging to this GSA was 1.381, representing 11,70% of the total Italian fishing fleet. Here demersal resources are exploited by both bottom trawling and small-scale fishing. The most important trawl flotillas, from North to South, are present in San Remo, Imperia, Santa Margherita Ligure, La Spezia, Viareggio, Livorno, Piombino, Castiglione della Pescaia, Porto Santo Stefano, Porto Ercole, Fiumicino, Terracina, Anzio, Gaeta, with the fishing capacity mainly concentrated in the Livorno, Fiumicino and Gaeta compartments.

GSA 10 – Southern and Central Tyrrhenian Sea**:** GSA 10 covers an area of 20.255 km2 and 1.129 Km of coasts belonging to 5 regions: Lazio (only for a few kilometers), Campania, Basilicata, Calabria (Tyrrhenian side) and Sicily (northern side). The central-southern Tyrrhenian Sea presents one of the most complex structures among the seas surrounding the Italian peninsula, due to its morphological, geophysical and water mass dynamics characteristics. Indeed, its coasts are characterized by many gulfs, and it has the richest island system of the entire peninsula. The variety of environments and species that characterize the central-southern Tyrrhenian Sea is confirmed also by the presence of cetaceans in the area of the Campania Archipelago. The total number of fishing vessels belonging to this area in 2022 was 2.649, representing 22,45% of the total Italian fishing fleet. The majority of the fleet (86% in 2018) is equally divided between the compartments belonging to northern Sicily and Campania, while the remaining 14% of the vessels fall into compartments in the Tyrrhenian Calabria. This area is particularly dependent on small-scale fishing; indeed, several marinas are present along its coasts.

There are two biological protection zones in which trawl fishing is banned in the GSA 10 (one opposite the Sorrento peninsula near the MPA of Punta Campanella in the Gulf of Naples, and the second along the coasts of Amantea, in Calabria). Management plans have been elaborated for different species (Hake, Pink or white shrimp, Mud mullet, Giant red shrimp).

GSA 11 – Sardinia (11.1 Western Sardinia; 11.2 Eastern Sardinia): Geographical sub-area 11 comprises the entirety of the seas surrounding Sardinia, one of the main Italian islands, with its 1846 km of coasts. The total number of fishing vessels belonging to this GSA was 1.430 in 2022 (12,12% of the whole Italian fishing fleet). Management plans have been elaborated for several species (Hake, Pink or white shrimp, Mud mullet, Giant

[39] In this section only national management plans have been mentioned for each specific GSA. Nevertheless, some local management plans have been adopted at local level, by regions (e.g. by Sicily, Campania and Calabria) but due to the fragmentation of the sources, authors decided to refer only to the national ones. For some more information, see: Ministero delle Politiche Agricole, Alimentari e Forestali, PO FEAMP 2021/2027, Servizio di studi e analisi mediante metodologia SWOT, 2 Rapporto, 2020.

red shrimp, Norway lobster). There are also three Biological Protection Zones (ZTB) closed to trawling by regional law, to establish restocking areas and sites in the Gulf of Cagliari, the Gulf of Palmas and the Gulf of Oristano. Nevertheless, small-scale fishing with fixed gear is permitted in these areas, even if with some restrictions. The fishing sector in Sardinia is characterized by marked craftsmanship as well as by a marked polyvalence and a prevalence of small-scale vessels.

### *2.3.2 Central Mediterranean*

GSA 16 – Southern Sicily: This GSA belongs to the Southern part of Sicily, the other main Italian islands and covers the Strait of Sicily, a wide area of sea between the southern coast of Sicily and North Africa. It is very well known for its high fish productivity, thanks also to the presence of important habitats linked to the ancient volcanic activity which led to the creation of several seamounts. This, together with the presence of particular currents that transport nutrient-rich cold waters, has contributed to an increase of the production of a large number of organic substances precious for coastal and pelagic species alimentation. In this GSA there are 1.096 fishing vessels in 2022, representing about 9,3% of the total Italian fleet. Despite the numerical predominance of artisanal fishing vessels, trawlers are particularly important for this GSA that together with the northern coast of Apulia represent, the areas where the trawl fleet has the greatest impact, in numerical terms of the entire fleet (based on available data referred to 2015)[40]. Management plans have been elaborated for the various species (Hake, Pink or white shrimp, Mud mullet, Giant red shrimp). In particular, hake and pink shrimp constitute very important commercial catches in the Strait of Sicily and represent shared stocks with Tunisia and Malta too. Besides the pink shrimp, the other species targeted by trawling in the Strait of Sicily are mullets and giant red shrimps whose fishing season that runs from March to September.

GSA 19 – Western Ionian Sea:The Ionian Sea is the deepest basin in the Mediterranean which communicates with the western Mediterranean through the Strait of Sicily, with the Adriatic Sea through the Otranto Channel by its northern part and with the Aegean Sea through the three straits of the Cretan Arc, in its oriental side. The most important demersal resources in GSA 19 are mud mullet, hake, white shrimp, Norway lobster and red shrimp. The total number of fishing vessels of this GSA was 1.339 in 2022, representing 11,35 % of the total Italian fishing fleet, belonging to 70% to small-scale fishing. Its fleet is characterized by artisanal fishing using trammel nets, longlines and creels and is equally distributed between Apulia, Ionian Calabria and Ionian Sicily. The main fishing ports are Corigliano Calabro, Crotone, Gallipoli and Taranto. Management plans have been elaborated for the three species (Hake, white shrimp, Giant red shrimp).

[40] FIORENTINO F., SABATELLA R.F., COLLOCA F., ACCADIA P., DI LORENZO M., COZZOLINO M., GANCITANO V., GAMBINO M., MILISENDA G., MALVAROSA L., PAOLUCCI C., PINELLO D., SABATELLA E.C., VITALE S. - 2017. *Convenzione tra Ministero delle Politiche Agricole Alimentari e Forestali e l'Istituto per l'Ambiente Marino Costiero del Consiglio Nazionale delle Ricerche (IAMC-CNR) – Unità Organizzativa di Supporto di Mazara del Vallo per la predisposizione di un contributo tecnico-scientifico per la redazione di un Piano di gestione per la pesca demersale nello Stretto di Sicilia. Rapporto Finale, IAMC-CNR, Mazara del Vallo, Italia, 132 pp.*

### 2.3.3 Adriatic Sea

GSA 17 – Northern Adriatic Sea: GSA 17 covers the Northern and Central Adriatic with a total surface area of approximately 92.660 Km², with more than 700 km of coasts. The waters of this basin are not very deep, not exceeding 100 meters, except for the Pomo Pit, in its middle part, where the depth reaches 270 meters. This area is characterized by a high concentration of juveniles of many demersal species that grow within a few months before moving away from the Italian coasts, often reaching the Croatian coast determining a close interrelation between the resources of the entire basin. Consequently, this area represents one of the most important fields of international cooperation in managing fisheries resources because all, or almost all target species caught by trawling in GSA 17, must be considered shared stocks between Italy, Croatia and Slovenia. The total number of fishing vessels belonging to this GSA was 2.890 in 2022, representing about 24.5% of the total Italian fishing fleet. The fleet located in GSA 17, which includes the upper and middle Adriatic coastal regions (Friuli Venezia Giulia, Veneto, Emilia Romagna, Marches, Abruzzo, and Molise) is characterized by a greater "industrial" or "semi industrial" connotation than the rest of Italy in terms of cost structure and production capacity. In 2022 the GSA 17 represented 51% of total landings in tonnes and 39% of the total Italian revenues in this sector, which made this area the most important among all relevant for the country (MASAF, 2023). Shared management plans with GSA 18 have been elaborated for several species (Hake, Pink or white shrimp, Mud mullet, Sole, Norway lobster). In the GSA 17 there are different Biological Protection Zones (ZTB) closed to fishing: Tremiti Area, "Area Tenue" (Chioggia, Veneto), "Area Tenue di Porto Falconara" (Caorle), "Area Barbare", and "Area Miramare".

GSA 18 – Southern Adriatic Sea: The Southern Adriatic Sea basin is connected to the Northern Ionian Sea through the Channel of Otranto. It is characterized by the junction of different waters: Northern Adriatic Dense Waters (NADW), Northern Adriatic Deep Waters (ADW) and Levantine Intermediate Waters (LIW). The total number of fishing vessels belonging to this GSA was 1.017 in 2022, representing 8,62% of the total Italian fishing fleet. This GSA refers to the Adriatic coast of Apulia: consequently, the contribution of this region to the total catch of the Country is extremely relevant. The management of this GSA is those shared with GSA17, above mentioned.

## 2.4 Processing, trade and markets

The Italian agri-food sector generated €65.953 billion in 2023, accounting for 3.8% of the national economy. Within this sector, the fish processing industry represents a strategic link between fisheries/aquaculture and consumers, combining artisanal traditions with industrial innovation. As of 2021, Italy counted 467 fish processing enterprises—a 9% increase compared to 2019—making it the EU's second-largest Member State by number of processors (14% of the total) (STECF 23-14). These companies processed over 667,000 tonnes of raw materials, generated €2.5 billion in turnover, and employed 6,585 individuals (5,251 FTEs). Turnover rose by 14.6% over 2019, supported by a 35% increase in diversified revenues over six years and a 50% rise in subsidies compared to 2019. Raw material costs dominated expenditure (74%), while labour costs remained low at 9%; energy and services increased by 4% and 13%, respectively.

The sector features a dual structure: larger industrial firms and numerous small-scale, often family-run micro-enterprises located near coastal and aquaculture production zones. Many of these micro-enterprises process less than 100 kg of fish daily and serve local markets without EU approval numbers, making them difficult to monitor systematically. Despite their small size, they play a vital socio-economic role, reinforcing ties with fishing communities and preserving local traditions. Italian processing companies handle a wide range of products, from massive, seasonal wild catches (e.g., anchovies, shrimp, mackerel, tuna) to freshwater aquaculture products, especially in inland and mountain areas. These firms often act as both processors and wholesalers. High-value products with strong territorial identity, such as Colatura di Alici di Cetara DOP, trout roe (exported mainly to Germany), and Sardinian bottarga (awaiting PGI status), exemplify the sector's contribution to Italy's gastronomic heritage and export potential. However, the industry remains highly dependent on foreign imports to sustain its production. Italy ranked sixth globally (FAO, 2022) and within the EU (EUMOFA, 2023) for fish and seafood imports. In 2022, imports reached 1.06 million tonnes, valued at €7.4 billion. Main suppliers included Spain (23%), Sweden (7%), the Netherlands (6%), and Denmark (5%). The top imported species were salmon (16.4%, mainly from Norway), shrimp (9.3%, primarily from Ecuador), and squid (8.3%, mostly from Argentina). In contrast, exports were limited to 129,095 tonnes and valued at just €0.9 billion. Major destinations were Germany (14%), Spain (13%), France (9%), and Austria (5%), with skipjack tuna (17%) and preserved fish (9.3%)—including canned tuna, anchovies, and sardines being the most exported products. The trade deficit reached €6.5 billion in 2022, with the average import price at €6.98/kg and export price at €6.97/kg. Apparent consumption was 1.18 million tonnes in 2020 (19.5 kg per capita), below the EU average of 22.5 kg.

Consumer behavior further reflects evolving preferences. In 2022, Italian households spent an average of €481.80/month on food and beverages, but seafood expenditure dropped by 12%. Fresh fish was the most purchased category (266,300 tonnes), followed by canned (140,000 tonnes), frozen (113,000 tonnes), and smoked (27,000 tonnes). Fresh seafood - nearly 50% of seafood spending - saw a 10.7% sales decline from 2021. Canned fish recovered to pre-pandemic levels, while frozen and smoked products fell by -8.1% and -11.4%, respectively, as consumers increasingly favored fresh, natural options. Nevertheless, frozen seafood remains attractive for portion flexibility and waste reduction. In early 2023, fresh seafood expenditure rose by 9.2%, but volumes of frozen and canned products declined (-7.5% and -6.4%) amid price increases of +13.4% and +9.2%.

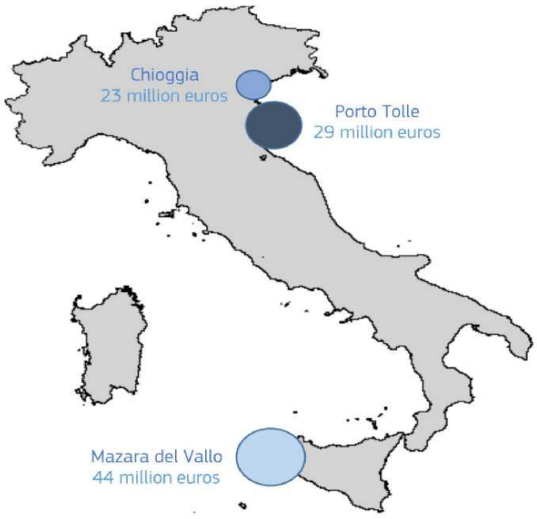
Regional consumption patterns reveal further nuance: ISMEA (2023) data show that Southern households consumed over 24 kg per year, 15% more than those in the Northeast. This reflects stronger coastal traditions and better access to fresh seafood in southern Italy.

### *2.4.1 Fish Sales, auctions, and wholesalers*

In Italy there are 49 Producer Organisations of which 35 are in the fisheries sector. In addition, two Associations of Producer Organisations are recognized, both operating in the fishery sector (EUMOFA, 2023).

The first sales of landed products are handled mostly by the fish auction markets, which last year handled over 83.000 tons. Three main ports (Figure 11) concentrated 17% of the national landing tonnage and over 26% of the commercial value.

*Figure 11 The main places for first sales.*



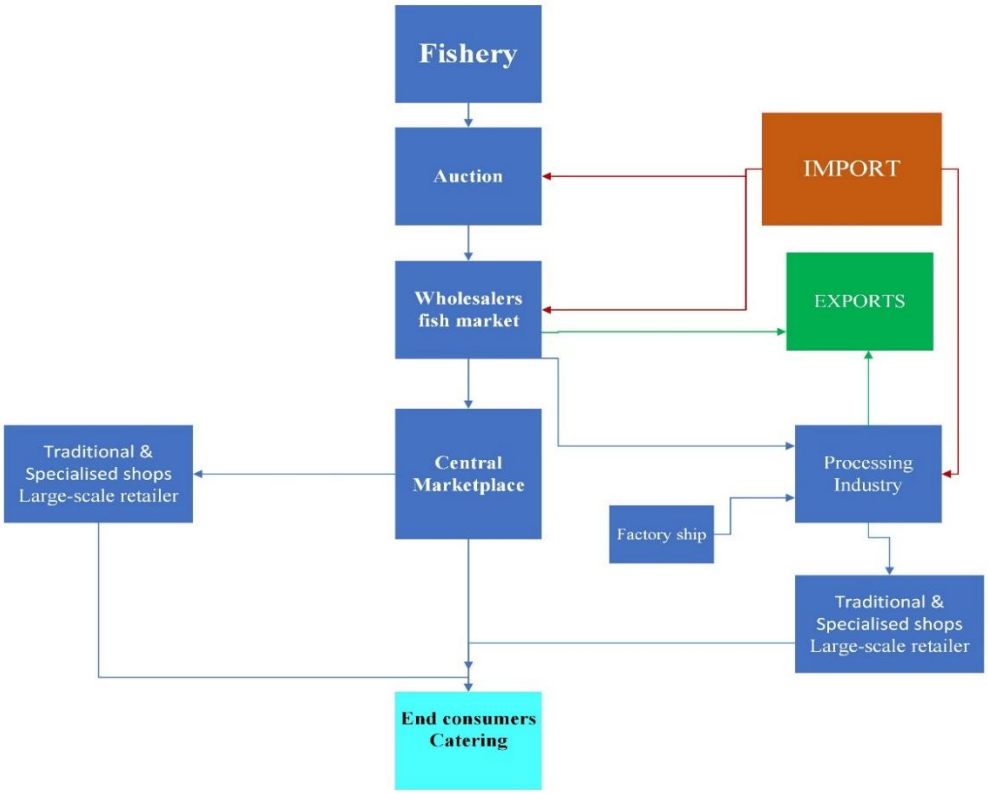

**Source**: EUMOFA Italian Profile, 2023

In the three ports, a volume of around 14 thousand tons is traded for a value of more than EUR 96 million.

| Top-3 places of sale | Volume (tonnes) | Value (million euros) | Top-3 main commercial species (in value) |
|---|---|---|---|
| Mazara del Vallo | 1852 | 44 | Shrimps, deep-water rose shrimps, Norway lobster |
| Porto Tolle | 4076 | 29 | Anchovy, sardine, squillid |
| Chioggia | 7825 | 25 | Common sole, clam, cuttlefish |

The value chain involves many actors and stages, from the fishers and farmers to the retailers and consumers (Figure 12).

*Figure 12 Seafood supply chain.*




***Source**: Authors elaboration on primary and secondary data.*

The fishery products are processed, packaged, distributed, and marketed by various intermediaries, such as wholesalers, processors, traders, retailers, and restaurants. Fish may be sold by auction or by lot. Examples of production markets (auctions) are the San Benedetto del Tronto, the Mazara del Vallo, or the Imperia one. On the other hand, trade markets resell fish bought from other production markets. Examples are the markets in Milan, Turin, and Genoa. Finally, there are the mixed markets, which are a mix of the two. Mixed markets are those of Savona and Fiumicino.

First sale fish auctions are places where fishers sell their fresh catch to different customers, such as wholesalers, restaurateurs, or end consumers. There are various types of auctions for the sale of fish, depending on species, quantities, and local traditions. Some auctions are bottom-up, “asta a scendere”, i.e. they start from a high price and go down until a buyer is found. Other auctions are by voice auctioneer, “asta con banditore a voce” i.e. the auctioneer announces the price of the fish and awards it to the highest bidder. These auctions are often very lively and attract tourists, who can watch the spectacle of bargaining and admire the variety and quality of the catch. First-sale fish markets are therefore an example of integration between the fishing and marketing sectors, guaranteeing freshness, traceability, and enhancement of the product. The auction by the ear, “asta all’orecchio”, is a traditional method of selling fish, which is based on discretion and trust between the participants. The seller offers his goods at a starting price, which can be negotiated confidentially with the buyers. The latter approach the seller and whisper their offer in his ear, which can be accepted or rejected. The

advantage of this system is that it avoids speculation and external influences on the price, which only depends on the quality of the product and demand. The electronic auction, “asta elettronica”, is a more modern and innovative system, which takes place in a special room equipped with a computer system. The fish is transported on a conveyor belt, where it is weighed, labelled, and shown to the buyers. The latter can follow the progress of the auction on a large electronic display board, which shows the name of the boat, the weight, and the price per kg of the box for sale. The auction is downwards, i.e. the price starts at a high value and gradually drops until someone blocks it with a button. The advantage of this system is that transparency and speed of the sale is guaranteed.

Interestingly, fish markets have witnessed a significant evolution over the centuries from simple openair markets to modern, specialised structures. This transformation reflects not only changes in consumer needs and tastes, but also advances in fishing, preservation, and distribution techniques. The Milan and Rome fish wholesalers’ markets represent two important hubs in the panorama of Italian fish markets. The wide range of products offered, including fresh, frozen, salted, smoked, and processed fish, testifies to the focus on quality and diversity of offerings to meet the needs of modern consumers. They play a key role in matching consumers’ needs for high quality, fresh seafood products, keeping traditions alive and adapting to modern expectations. The Milan wholesale fish market stands out for its significant economic impact, with an annual turnover of EUR 100 million and a transaction volume of up to 10.000 tons of fish. Its competitive position is also evident in comparison to major European markets such as Barcelona, Madrid, and Paris. The wide variety of fish species, averaging between 250 and 300 species each day, further underlines the scope and diversity of this market. In addition, the operational efficiency is reflected in the average daily turnover of sellers, which is around EUR 264.000 for 34 tons of fish product sold. Managed by Sogemi41, the Milan Fish Market plays a major role in the national panorama, being the largest in the country. With the approval of the Foody 2025 plan42 by the Municipality of Milan, the market is preparing to transform itself into a major international agrifood hub, destined to play a strategic role in the trade and distribution of products. The Milan wholesale fish market is distinguished by its diversified customer base, mainly including four categories of buyers. Of the total, 40% are traditional street fish sellers, who transfer their catch to neighborhood markets. This is followed by retailers, such as fishmongers, who make up about 30% of the clientele, while wholesalers, who supply the Ho.Re.Ca. sector, also account for about 30% of the buyers. A minority of 5% are Ho.Re.Ca. operators who buy directly from the wholesale market. The Ho.Re.Ca. sector, which includes hotels, restaurants, and catering, is of fundamental importance and involves all activities related to the preparation and service of food and beverages. Furthermore, the Milan Market plans to expand the services offered to operators

[41]Sogemi - Società per l'Impianto e l'Esercizio dei Mercati Annonari all'Ingrosso di Milano - is the joint-stock company that, on behalf of the Municipality of Milan, manages all the wholesale food markets in the city, guaranteeing their operation through the provision of qualified services to support the commercial activities carried out by the operators. https://www.italiaatavola.net/attualita-mercato/2023/6/15/sogemi-2025-punta-diventare-primo-city-hub-alimentazione-europeo/96806/

[42] The project envisages a phased investment plan of EUR 500 million for the construction of logistics platforms and market areas, alongside support services such as laboratories and food training centres.

in the fish sector, including the possibility of logistics services and the creation of an area dedicated to processing fresh fish. These actions aim to respond to the evolving needs of consumers by offering integrated solutions and creating an environment suited for both fish trading and processing. From a social perspective, the city of Milan stands out with more than 90 neighborhood markets (the highest number in Italy) serving as vital hubs that connect producers, traders, and consumers. This extensive network contributes significantly to the richness and diversity of the city's food supply.

Within this context, the fish processing industry plays a pivotal role in ensuring the availability of high-quality products for both wholesale markets and final consumers. The sector is supplied not only through major logistic platforms in Milan and Rome, but also directly from factory ships that farm fish offshore or deep-freeze their catch at sea, illustrating the complexity and reach of the supply chain.

In parallel, Italy confirmed its position in 2022 as the EU's top consumer of fishery and aquaculture products, with household spending reaching €13 billion (a 12% increase from 2021) and per capita expenditure of €219 (56% above the EU average). Nevertheless, consumption of the top five fresh species declined to 279,536 tonnes, marking a five-year low, with volumes down 14% and value down 8% year-on-year. While sea bream retained its leading position, salmon experienced a sharp decrease in demand. Italy also ranked fifth in the EU for processed fish consumption, with an average of 3.7 kg per capita. Consumer preferences are shifting increasingly toward specialised fish shops and fishmongers, which hold a 59% market share and have evolved significantly since the pandemic through digital engagement and enhanced home delivery services. These developments, combined with growing attention to freshness, traceability, and portion control, are reshaping consumer habits and strengthening connections across the supply chain. Although supermarkets and hypermarkets continue to dominate fish purchases (69%), direct sales from fishers and online platforms- while still marginal - play an important socio-economic role, especially in supporting small-scale fishers and sustaining coastal communities.

## 2.5 Fisheries innovation

The STECF AER (2023) reports that the investments in the fishing fleet decreased by 13% in 2021 compared to 2020. The investment level was very low, with an average of 1,5 thousand euros per vessel, and an average age of the vessels of 36 years. The large-scale fleet made 64% of the total investments, while the small-scale fleet had few or no investments because of the low financial resources and low propensity to risk-taking and innovation. According to a recent quantitative analysis on European Maritime and Fisheries Fund (EMFF) (Gambino *et al*., 2022) measures specifically tailored for supporting the fishing fleet, have been mainly destinated to small scale vessels, to improve and diversify their activities, enhance their competitiveness and viability, and reduce their environmental impact. The larger share of financial support was allocated to trawl vessels mainly for permanent or temporary cessation). Some national authorities also provided additional funding opportunities for small scale vessels. For improving sustainable growth and innovation in fisheries sector, Legislative Decree No. 197 of 29 December 2022, Article 1, Paragraph 428 and following, established the "Fund for Innovation in Agriculture and Fisheries". The purpose of this fund is to support and promote

innovation in the fisheries sector through funding and assistance for innovative initiatives in order to foster the development and modernisation of these important production sectors. Some examples of the initiatives supported by the fund are the introduction of new technologies for sustainable fishing, the improvement of the quality and safety of fish products, and the diversification of the activities and income sources of fishers. The fund allocates EUR 75 million annually for 2023-2025. It supports purchasing/installing: (a) vessel equipment for lower emissions and better energy efficiency; (b) innovative/selective fishing gear; (c) tools improving fisheries product quality. Only fishing businesses committing to a minimum five-year operation post subsidy are eligible. Another innovation that concerns a new management approach at sea and on land is the willingness to recover marine litter accidentally caught in fishing operations. This good practice, which is fully in line with SDG 14 of Agenda 2030 (Cozzolino M. *et al*., 2024)[43], is strongly and deeply entering the innovative modus operandi of fishing communities. As many have stated, professional fishing and marine litter are two phenomena that influence each other economically. Marine litter damages the environment and sea-related productive activities, included fishery. It is estimated that the fishing industry loses between 1% and 5% of its turnover each year due to marine litter, totalling some € 61,7 million[44]. This loss is due both to the cost of repairing vessels and equipment, damaged by floating objects, and to the reduction of potential catches, limited by the scarcity of fish resources. Hence, considered that fishery is one of the economic sectors most affected by the depletion of available resources, whose breeding is being hampered by pollution due to marine litter, in 2021, the EMFF expenditure[45] has covered 176 projects of recovering marine litter for a total commitment of €36 million. Moreover, another factor affecting the availability of fish resources concerns the health of the seabed, which suffers from the massive presence of waste. For this reason, the Italian state has allocated 400 million euro under the National Recovery and Resilience Plan funds to support mitigation actions for the health of the aquatic ecosystem and to safeguard the seabed.

[43] Cozzolino M., Grassi R.F. (2024). AssIDMER. La gestione del marine litter è una sfida per la pesca professionale. ISBN 979-12-5976-907-7

[44] UN Environment (2017). Marine Litter Socio Economic Study, United Nations Environment Programme, Nairobi. Kenya.United Nations Environment Programme (UN Environment), 2017. ISBN No: 978-92-807-3701-1. Job No: DEP/2175/NA.
https://wedocs.unep.org/bitstream/handle/20.500.11822/26014/Marinelitter_socioeco_study.pdf?sequence

45 Annex RELAZIONE DI ATTUAZIONE ANNUALE del Programma Operativo FEAMP 2014-2020. Rif. Anno 2021. In attuazione dell'articolo 50, paragrafo 9, del Regolamento (UE) n. 1303/2013.
file:///C:/Users/medit/Downloads/Sintesi_RAA_2021.pdf

# 3 Governance system

Fisheries interacts with other sectors related to the blue economy and therefore a synthesis of its system of governance must necessarily interface with the cross-border repercussions of maritime activities. However, to delineate the NFP, the focus in this section is primarily on fisheries management, with a special mention for the Italian Ecological Protection Zone (EPZ) implications.

## 3.1 Responsible authorities

Several public actors are relevant for the Italian fisheries management based on different levels:

- International level: 3 RFMOs relevant to the Italian fisheries sector;
- EU level: European Commission, Parliament and Council;
- National level: Ministry of Agriculture, Food Sovereignty and Forestry (MASAF), Ministry of the Environment and Energy Security (MASE), Ministry of Infrastructure and Transport (MIT), Ministry of Enterprises and Made in Italy, Ministry of Health;
- Regional level: Italy is subdivided into 20 administrative regions[46]. '*Over and beyond sector-specific regulations, Regions intervene in a series of other activities, including the following: preparing their own research and development programmes, enhancing local products in relation to local traditions, providing support for safeguarding biodiversity, contributing to defining locally-applicable national management plans, adopting local management plans and defining rules for setting up fishery and aquaculture districts*'[47]. Regions are also responsible for the identification of the Fishery Districts[48] and have competencies in veterinarians issues in coordination with the Ministry of Health.

The participation both as advisory bodies or with decisional power include GFCM and scientific committees within other RFMOs, Joint Scientific Committees with third countries in the framework of SFPA, STECF, and regional research institutes. Italian organizations are present in seven of the ten fisheries Advisory Councils (ACs)[49], and in Italy there is the head Office of the Mediterranean one (MEDAC)[50]. Consultative bodies exist also at the national and regional levels. Producers Organizations, associations, cooperatives, etc., and their umbrella organizations at the regional and national levels are present in several national and international fora. Moreover, NGOs and FLAGs are active in the governance system of the fisheries sector. Table 4 synthesizes,

[46] Valle d'Aosta, Piemonte, Lombardia, Liguria, Trentino Alto Adige, Veneto, Friuli Venezia Giulia, Emilia Romagna, Toscana, Umbria, Marche, Lazio, Abruzzo, Molise, Campania, Basilicata, Puglia, Calabria, Sicilia e Sardegna

[47] L. TUDINI, The contribution of the Italian administrative regions to fishery resource management and marine fisheries development, in MIPAAF, S. CAUTADELLA, M. SPAGNOLO (edited by), The state of the Italian marine fisheries and aquaculture, Rome, 2013.

[48] Italian Decree Law 228/2001, art. 4

[49] Aquaculture, Baltic Sea (for sport fishing), Long Distance, Market, Mediterranean, North Sea and Pelagic (trough AIPE-CEP). See: https://oceans-and-fisheries.ec.europa.eu/fisheries/scientific-input/advisory-councils_en.

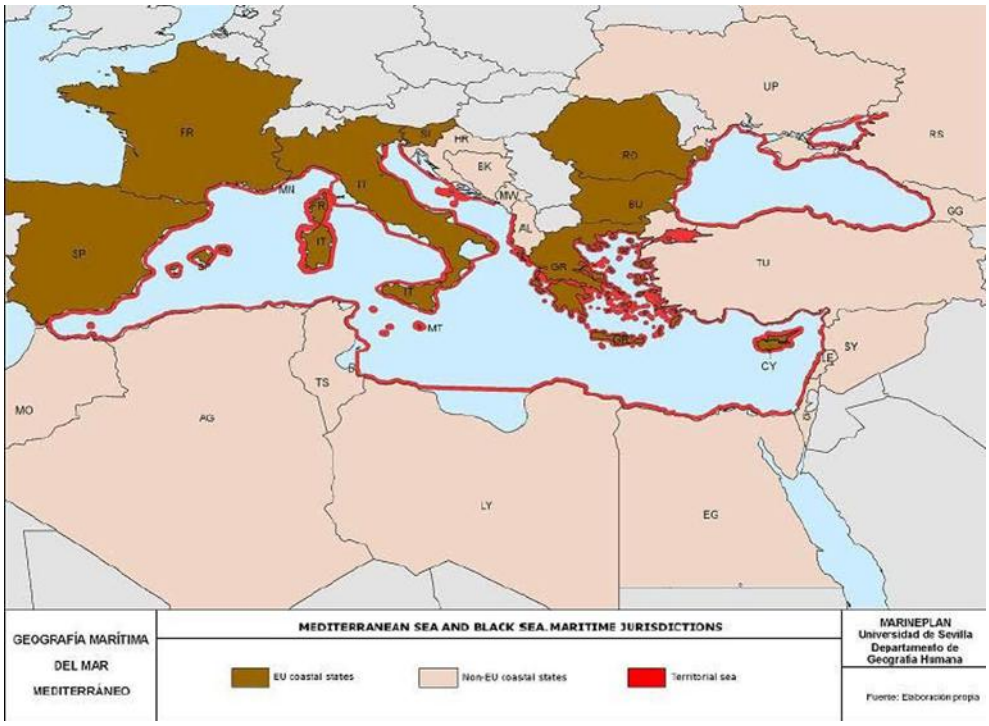
50 https://en.med-ac.eu/index.php

by area and topics, the several Italian authorities that contribute to the governance of fisheries.

*Table 4* Responsible authorities for fisheries management in Italy.

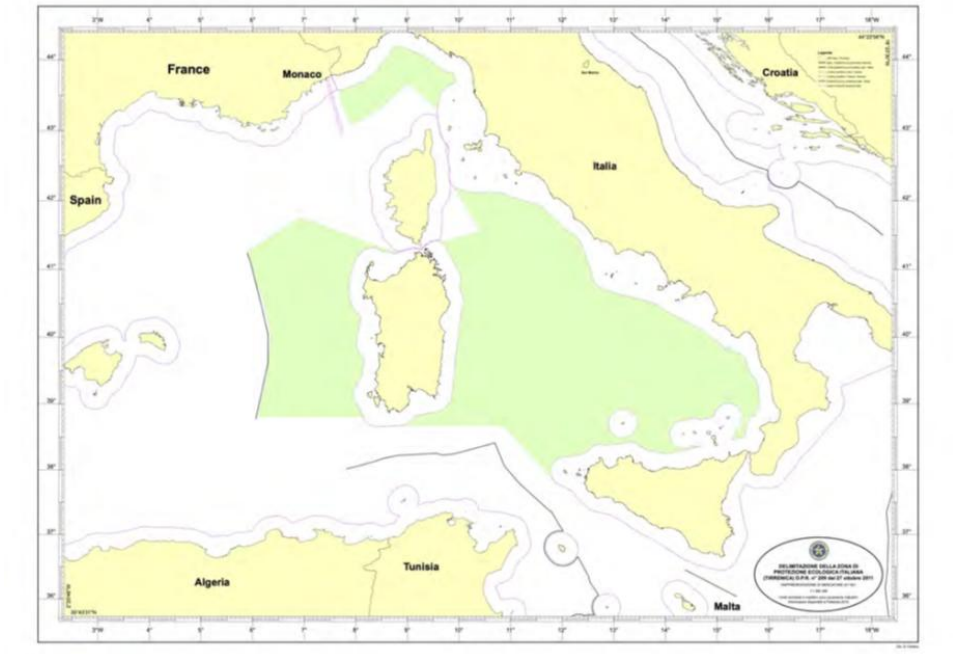
| Geographical area | Responsible authority | Topic |
|---|---|---|
| Resources in third countries waters (EEZ) | Costal State<br>European Commission (Sustainable Fisheries Partnerships Agreements) | Access and resources extraction |
| Resources in International Waters | International Organizations Regional Fisheries Management Organizations (RMFOs) | Resources extraction |
| Resources in EU waters (EEZ of other EU MS) | EU Commission –DG MARE Coastal state | Fisheries policy: resources, structures, markets and international relationships (CFP) |
| | European Commission-DG ENVIRONMENT<br>Competent Government of State having giurisdiction | Marine environmental policy (MSFD) |
| Resources in national waters: Territorial Sea (12 -nautical mile zone from the baseline, Art. 2 UNCLOS) plus the Ecological Protection Zone (protection of mammals) | Italian Government (Ministry of Agriculture, Food Sovereignty and Forestry (MASAF) and Regions | Fisheries management |
| | Italian Government (Ministry of the Environment and Energy Security - MASE) | Marine environmental policy (MSFD) and protection of mammals |
| Resources in inshore waters (area between the coastline and the base line, Art. 8 UNCLOS) | Italian Government (Ministry of Agriculture, Food Sovereignty and Forestry (MASAF) | Fisheries management |
| | Regions | Fisheries management and aquaculture in marine waters |
| Infrastructures | Italian government: Ministry of Infrastructure and Transport and Port Authorities (15) Regional governments | Port management, administrative functions, Port maintenance |

*Figure 13 Territorial Sea: Mediterranean and Black Seas*




***Source**: EU Parliament, Jurisdictional Waters in the Mediterranean and Black Seas.*

*Figure 14Italian Ecological Protecting Zone*




***Source**: F. Caffio/IMM, 2023.*

*Figure 15 Italian Port Authority System*


***Source**: Ministry of Infrastructure and Transport*

The core governmental structure and functions are the following:

- The Directorate General for Maritime Fisheries and Aquaculture (Direzione Generale della Pesca Marittima e dell'acquacoltura) within the Ministry of Agriculture, Food Sovereignty and Forestry (MASAF): is responsible for the general management of the fisheries sector and it is the single authority responsible for coordinating the control activities of all national control authorities responsible for compliance with the rules of the CFP (looking after and representing the interests of fishing and aquaculture at EU and international level; general regulation and coordination of fisheries and aquaculture 105policies activities making uses for this function of the General Command of the Italian Harbour Masters Corps - Coast Guard; import and export of fishery products; State aids in the field of fishing and aquaculture; research applied to fishing and aquaculture; protection, valorization, traceability and quality of fishery products; national fulfilments related to the EMFF etc). The Directorate General is divided into four non-general management offices.
- The Sea Fishing Department of the Italian Harbour Masters Corps - Coast Guard (Reparto Pesca Marittima del Corpo delle Capitanerie di Porto): carries out liaison activities between the MASAF and the General Command of the Italian Harbour Masters Corps - Coast Guard (Comando Generale del

Corpo delle Capitanerie di porto - Guardia Costiera), in all matters involving the Corps' tasks relating to the supervision and control of sea fishing, aquaculture and related sectors. It consists of an administrative secretariat and 3 offices.

- In the General Command of the Italian Harbour Masters Corps - Coast Guard there is the National Fisheries Control Centre (NFCC) leveraging the peripheral structures present at each of the 15 Maritime Directorate, denominated Fishing Area Control Centre (FACC). It has, as a priority task, the monitoring of fishing effort and related economic activities.

*Figure 16 Maritime Directorate (FACC)*


***Source**: MASAF/ Comando Generale del Corpo delle Capitanerie di Porto Guardia Costiera, Controllo pesca. Rapporto 2022*

- The Ministry of Infrastructure and Transport (MIT) is responsible for transport, road and logistics activities in the territory, including navigation, security and transport by sea and inland waterways, and infrastructures (ports). It is also the National MSP authority. Italian Coast Guard cooperates with this Ministry for its competences on navigation and port issues.

- Coast and marine environment, biodiversity, MPAs, are the responsibility of the Ministry of the Environment and Energy Security (MASE). The Italian Coast Guard cooperates with this Ministry for the protection of the marine environment.
- The Ministry of Enterprises and Made in Italy: competent for companies and industry, has competence for food labelling.
- The Ministry of Health is responsible for the protection of human health, coordination of the national health system, veterinary health protection, occupational health protection, food hygiene and safety. It is also the health authority for animal origin products (fish and shellfish) and for the Import/Export of the same products. This Ministry has the task to coordinate local control authority (public veterinarians) in cooperation with regions.

## 3.2 National organisation

### *3.2.1 Producers organizations*

Established in 1970, Council Regulation (EEC) No 2142/70 formed the EU's fishery market policy foundation, integrated within the CAP. Regulation (EC) No 1379/2013, effective since 2013, streamlined Producer Organizations' (POs) management, crucial for sustainable fisheries and fishermen's economic prospects. The 1999 CMO reform, under Regulation (EC) No 104/2000, significantly empowered POs, enhancing their sectoral importance. Positioned strategically between production and the market, POs can effectively implement measures for resource management, enhance the value of fish products, and promote market stability. Entrusting POs with increased responsibility for self-regulation in resource management fosters improved adherence to market demands and alleviates strain on fish stocks. In Italy there are 43 POs in the fishery (35) and aquaculture sector, each of which has an average of 111 producers, and there are also two Interprofessional Organisations active for coordination purposes. The variegated number of POs operating in Italy represents both SSF and LSF, although the intensity of the presence of fishermen belonging to artisanal (SSF) or so-called industrial (LSF) fisheries may vary depending on the specific organisations and regions. Producer organisations (POs) are generally formed to promote common interests, manage marine resources, and ensure the sustainability of fisheries. However, it is important to note that the participation of small fishing enterprises may face challenges such as, for example, their limited available resources to fulfil the requirements of active participation in PO management, or limitations in accessing information. Many of the challenges have been mitigated over the years and one of the key points of the new programming is to increase cooperation between the different forms of association in the fisheries sector in order to strengthen their ability to compete in the markets. One of the measures foreseen in the EMFF Operational Programme was that POs will be able to buy fishery products when prices are too low and keep the fish supply to sell them at a more advantageous time (Art. 67 EMFF). Indeed, this system may foster market stability.

### *3.2.2 Other national organizations*

Italian fishing associations play a crucial role in representing and supporting Italian fishermen, contributing to the well-being of the country's fishing sector. To this aim, they represent the interests of fishermen and promote

the sustainable development of the fishing sector. In particular, the activities developed concern:

- Representation and negotiation: to protect the interests of fishermen at national and international level, participating in meetings and agreements with institutions and other actors in the sector. They also negotiate working conditions, wages, safety and workers' rights.
- Legal assistance and counselling: to provide fishermen with legal assistance on contracts, licences, regulations and litigation, as well as support for fiscal activities related to payroll, contributions and administrative requirements.
- Training and professional updating: to provide fishermen with training courses on various topics, such as safety at sea, management of fishery resources, new fishing techniques, blue economy, innovation. The aim is to promote professional updating to improve fishermen's skills. In addition, some associations offer scholarships for young people who want to take up the job of fisherman, which is currently unattractive to the younger generations.
- Occupational safety: to raise awareness among fishermen about safety at sea and the risks associated with fishing. They also work with institutions to improve working conditions and prevent accidents.
- Promotion of sustainability: to strengthen fishermen's awareness of efficient and effective practices of sustainable management of fisheries resources and conservation of marine ecosystems.
- Research and innovation: to activate collaborations with research institutes to develop new technologies and practices in the fisheries sector. They also promote innovative actions to improve the efficiency and profitability of fishing enterprises through tailor-made actions.

The following associations represent the main ones involved in the fishing sector that recognise and assert the interests and needs of the various fishing operators in Italy [51]:

- AGCIPESCA[52], Associazione Generale Cooperative Italiane della Pesca, which brings together sea, lake and river fishing cooperatives, both production and processing and marketing.
- CONFCOOPERATIVE FEDAGRIPESCA[53], which coordinates the activities of fishing cooperatives belonging to Confcooperative.
- FEDERPESCA[54], Federazione Nazionale delle Imprese di Pesca (National Federation of Fishing Enterprises), which represents industrial and artisanal fishing enterprises, both catching and breeding.
- LEGA Coop Agroalimentare Dipartimento PESCA[55], an association of fishing cooperatives that is a member of Legacoop, which promotes the sustainable development of cooperative fishing and the protection of the marine environment.

[51] As it is reported on MASAF webpage https://www.politicheagricole.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/999. (Verified in Mar.2024)
[52] http://www.agcipesca.it/
[53] https://www.fedagripesca.confcooperative.it/Chi-Siamo.
[54] https://www.federpesca.it/
[55] https://www.dipartimentopesca.it/

- UNCI AGROALIMENTARE[56], Unione Nazionale Cooperative Italiane (National Union of Italian Cooperatives), which groups agri-food cooperatives, including those operating in the fishing and aquaculture sector.
- UILA PESCA, aims, in particular, to develop trade union action; to promote initiatives aimed at improving living and working conditions, with particular regard to contractual and social security protections; to promote the principles of responsible fishing and undertake all useful initiatives to disseminate the contents of the FAO code of conduct; and to offer workers the opportunity to obtain adequate professional training.
- ASSOITTICA ITALIA, the National Association of Seafood Companies, associates companies operating, in whole or in part, in the seafood chain. The activity concerns the analysis, evaluation, and information to the member companies of the evolution of the regulatory European measures on the relevant matters for the seafood sector. It collaborates with institutions, universities, and national and international organisations to promote the quality and safety of seafood products.

### *3.2.3 Relevant stakeholder groups*

The governance of Italian fisheries relies on the collaboration of a wide range of stakeholders, essential to ensure sustainable resource management, the protection of marine ecosystems, and the promotion of local fishery products. These actors play complementary roles across environmental, economic, and social dimensions.

i. **Non-Governmental Organizations (NGOs)** such as WWF Italy, Legambiente, and Marevivo are active in awareness-raising, capacity building, and promoting sustainable fishing practices. These organisations work closely with local communities to support the conservation of marine biodiversity, fight illegal fishing, and foster certifications such as those promoted by the Marine Stewardship Council (MSC).

ii. **Fisheries Local Action Groups (FLAGs)** are territorial partnerships that bring together fishers, local authorities, research bodies, and civil society to promote the sustainable development of coastal communities. In Italy, FLAGs support projects for economic diversification, social innovation, the enhancement of local fish products, and environmental sustainability. Through the European Maritime and Fisheries Fund (EMFF), they co-finance initiatives that combine tradition, innovation, and local identity.

iii. **Small-Scale Coastal Fisheries (SSF)** represent a cornerstone of the Italian fishing sector, especially in southern regions and islands. These fisheries often benefit from the support of FLAGs and NGOs in improving access to markets, adopting sustainable practices, and developing value-added initiatives. In many coastal communities, COGEPA (Comitati di Gestione della Pesca Artigianale)—grassroots small-scale fishers' committees—play a key role in participatory governance, resource co-management, and ensuring local stewardship.

[56] https://unciagroalimentare.org/. (Verified in Feb. 2024)

iv. **Fishermen's Cooperatives and Producer Organisations** contribute to the management of fishing activities and support traceability, fair marketing, and quality of products. They often coordinate with FLAGs and environmental groups to improve fisheries management and advocate for fishers' interests in policy dialogue.

v. **Marine Protected Areas (MPAs),** such as Punta Campanella, Regno di Nettuno, and the Cilento National Park, are increasingly involved in collaborative governance frameworks that include fishers, local administrations, and environmental actors. MPAs play a crucial role in protecting marine biodiversity and offer a platform for co-management and sustainable resource use.

Several projects demonstrate the effectiveness of multi-stakeholder collaboration:

- Donne nella Pesca is a national initiative supported by five FLAGs and five Italian Regions, financed by EMFF measure 4.64. It aims to strengthen the role of women in the fisheries and aquaculture sectors, supporting their inclusion in productive, management, and research activities.
- REMARE, funded by the Campania Region through EMFF 2014–2020, mobilised fishermen's cooperatives and marine protected areas to remove 19 tonnes of marine litter from 50,000 hectares of seabed in just four months. The project fostered cooperation among fishers, waste management services, port authorities, and local institutions, raising environmental awareness and building long-term networks.
- BluFish, promoted by the MSC in collaboration with NGOs and local stakeholders, supports sustainable fishing in southern Italy and the islands. The project provides tools, training, and tailored action plans for fisheries aiming to improve practices and achieve MSC certification.

Together, these examples underscore the importance of inclusive governance in Italian fisheries, where collaboration between institutional, environmental, and community actors enhances the resilience, sustainability, and socio-economic value of the sector.

## 3.3 Management instruments

In Italy, fisheries management combines national and EU tools to ensure the ecological, economic, and social sustainability of marine resources. The Common Fisheries Policy (CFP) is the EU's main framework, introducing tools such as multiannual management plans, effort control, technical measures, fleet capacity limits, and the Landing Obligation. Between 2014 and 2020, Italy received EUR 979 million from the EMFF. By April 2023, EUR 745 million were committed and EUR 562 million paid. Funds supported training, fleet cessation, digital tools, innovation, and environmental actions. Despite this, the sector remains small and fragile, with ageing fleets and limited investments. Fisheries Local Action Groups (FLAGs), 53 in total, helped diversify activities and improve local supply chains. Italy also relies on national tools such as the National Fisheries and Aquaculture Programme and the Solidarity Fund, strengthened in recent years. Emergency measures included fuel tax credits, permit extensions, support for managing blue crab, and reduced social security contributions. The OECD tracks public support to fisheries, including direct payments and services like research, stock management, and promotion. The goal is a more sustainable and resilient sector. The

National Three-Year Fisheries and Aquaculture Programme (PTP) 2022–2024 sets priorities: green transition, competitiveness, stakeholder engagement, product traceability, and biodiversity protection. It aligns national, regional, and EU efforts. Italy applies the EMFAF to fund sustainable fishing, innovation, support for young fishers, and marine conservation. Due to the multi-species and seasonal nature of Mediterranean fisheries, Italy mainly uses technical measures: licensing, gear rules, closures, size limits, and recovery plans. Enforcement is ensured through the Coast Guard, digital monitoring tools, satellite systems, and strict controls against IUU fishing. Referring to technical measures and management tools, given the highly multi-species and seasonal nature of Mediterranean fisheries, Italy mainly relies on technical measures rather than quotas. These include: i) Fishing permits and licensing systems; ii) minimum conservation reference sizes; iii) gear selectivity rules (e.g., mesh size); iv) temporal and spatial closures (e.g., biological rest periods); v) Permanent or temporary cessation schemes; vi) recovery and management plans for overexploited stocks (e.g., for bluefin tuna and Mediterranean swordfish); vii) catch Limits (TACs) and Quotas. While quotas are less common in the Mediterranean than in Northern Europe, some species are managed through TACs. For 2023, Italy received specific quotas for anchovies, sardines, deep-water rose shrimp, and bluefin tuna. Italy's bluefin tuna quota (5,283 tonnes) is distributed among purse seiners, longliners, and traps .

## 3.4 Marine Spatial Planning

Marine Spatial Planning (MSP) plays a central role in ensuring the sustainable use of marine resources in Italy, balancing ecological protection with the social and economic needs of coastal communities and maritime sectors. It is a key instrument for implementing the EU Marine Strategy Framework Directive (MSFD) and the EU Biodiversity Strategy for 2030, and it is based on the ecosystem-based approach. This approach ensures the long-term sustainability of marine ecosystems while managing human activities such as fisheries, aquaculture, maritime transport, and the growing demand for offshore renewable energy. In Italy, fishing activities are regulated through several national and EU regulations that define when, where, and how fishing can take place. Among them, Legislative Decree No. 228/1999 introduced the zoning of marine areas for fisheries management. Marine spaces are classified as follows:

- Integral protection zones: areas where all fishing activities are prohibited to allow the recovery of marine habitats and fish stocks.

- Marine reserve zones: areas where only limited fishing activities are allowed, under strict controls on methods and quantities, to safeguard biodiversity.

- No-fishing zones: areas where specific fishing techniques are banned to protect sensitive habitats or vulnerable species.

This regulatory framework aims to preserve marine ecosystems while supporting the sustainability of fishing practices. MSP has the potential to foster coordination among sectors and stakeholders, including professional fishers, environmental organisations, public authorities, and local communities. By clarifying spatial uses and defining priorities, it helps to reduce conflicts, promote transparency, and enhance the integrated management of coastal and marine resources. A concrete example of MSP applied to fisheries is the *Maritime Spatial Management Plan of the Liguria Region*, officially adopted in autumn 2023. This regional plan introduces specific measures to protect ecologically sensitive areas and regulate fishing activities to ensure environmental sustainability while supporting local fisheries. However, despite these advancements, Italy has faced challenges in fully implementing the EU MSP Directive (2014/89/EU). On 23 May 2024, the European Commission referred Italy to the Court of Justice of the European Union for failing to correctly transpose and apply the Directive. In response, the Italian government accelerated national planning efforts. In July 2024, the National Sea Plan was officially approved by the Interministerial Committee for Sea Policies. Valid for three years, the plan establishes the national framework for maritime spatial planning and aligns with Directive 2014/89/EU. It includes sector-specific maritime spatial plans and provides a legal and strategic foundation to guide the sustainable development of all maritime activities, including fisheries, while ensuring the protection of marine ecosystems.

## 3.5 Fighting IUU Fishing

Italy's extensive coastline and active fishing sector demand a robust control system to combat Illegal, Unreported and Unregulated (IUU) fishing and ensure the sustainability of marine ecosystems and fishery resources. The national system is aligned with Council Regulation (EC) No. 1005/2008, which defines IUU fishing as activities carried out without authorization, in breach of regulations, or without proper reporting. At the national level, responsibility for monitoring and enforcement lies with the General Directorate for Maritime Fisheries and Aquaculture (Ministry of Agriculture, Food Sovereignty and Forestry) and the General Command of the Italian Coast Guard, designated as the National Fisheries Control Centre (CCNP) under Presidential Decree 424/1998. Controls are carried out using electronic monitoring systems, such as the VMS and ERS, and include both coastal and offshore fleets, as well as recreational fisheries. The Italian sanctioning system applies both administrative and criminal penalties, as per Legislative Decree 4/2012, depending on the seriousness of the infringement. Administrative fines apply to all violations of the CFP, and are increased in cases involving sensitive species such as bluefin tuna (*Thunnus thynnus*) or swordfish (*Xiphias gladius*), or for fishing undersized specimens. Sanctions may include catch and gear confiscation, fishing license suspension or revocation, and business closures. A penalty point system for license holders and vessel masters has also been implemented, alongside a national digital register of infringements. Italy is recognized as one of the most proactive EU Member States in enforcing IUU measures. Between 2015 and 2019, Italy issued penalty points for all serious infringements and recorded the highest average fines in the EU for key violations such as logbook inaccuracies, quota misuse, and fishing in closed areas. In 2022, the Italian Coast Guard performed 90,525 inspections, identifying 4,585 administrative offences, with penalties totaling over €7.9 million, and

issued 153 reports to the judiciary. Most serious violations were related to spatial-temporal closures (159 cases) and logbook or AIS violations (93 cases).

**Recreational fisheries** are also subject to monitoring, as they can contribute to IUU fishing. In 2022, 12,288 checks led to 1,366 inspections and 502 offences, including 10 criminal violations. Authorities seized 7,182 kg of illegal catch and 1,003 fishing gears, with administrative fines exceeding €591,000. These efforts are particularly relevant in the Mediterranean, where fisheries are often multi-species and face mounting pressure from climate change, non-indigenous species (e.g., blue crabs), and historical overexploitation. The Italian approach combines legal enforcement with ecosystem-based strategies to protect biodiversity and ensure the long-term viability of the sector. To further strengthen traceability and prevent IUU fishing, the GFCM has designated 18 authorized Italian ports where foreign vessels may enter, provided they notify authorities 72 hours in advance. These ports—such as Genoa, Naples, Palermo, and Venice—serve as key points for monitoring foreign fishing activities in the Mediterranean, enhancing transparency and compliance.

*Figure 17* Italian national ports in the GFCM area of application

**Source**: https://www.fao.org/gfcm/data/ports

## 3.6 Landing Obligation

The landing obligation (LO), introduced by the 2013 reform of the CFP, became mandatory for all EU fleets from January 2019. In Italy, the LO is regulated primarily by Regulation (EU) No 2019/941, which implements rules for the management of fish stocks and mandates the landing of all catches of species subject to catch limits. The key objective is to reduce discards and encourage more selective fishing practices. In the Italian context, the implementation of the LO is governed by several levels of regulation:

- **European Framework**: Italy adheres to the general EU framework for the landing obligation, especially for species managed under multiannual plans and those with defined Total Allowable Catches (TACs).

- **Ministerial Decrees**: The Italian Ministry of Agriculture, Food Sovereignty and Forestry (MASAF) has issued national decrees to transpose and implement the EU regulation. These define the technical guidelines for compliance, port designation for landings, and the procedures for exemptions.

- **Regional Regulations**: Certain coastal regions have adopted additional provisions to tailor implementation to local fisheries characteristics, particularly in multi-species fisheries such as those in the Mediterranean.

- **Control and Enforcement**: The Italian Coast Guard, under the coordination of the General Directorate for Maritime Fisheries, is responsible for monitoring compliance with the LO. Inspections are conducted both at sea and at designated landing sites to ensure that no illegal discards occur and that all catch is properly recorded.

Exemptions: Italy has obtained exemptions for certain fisheries under Article 15 of the CFP. These include:

- De minimis exemptions (for small quantities of unwanted catch),

- High survivability exemptions (where species have a proven ability to survive discarding),

- Exemptions in defined geographical areas, especially for small-scale fisheries using passive gear.

Although the Mediterranean's mixed fisheries present unique challenges for LO enforcement, efforts have focused on increasing selectivity of fishing gear, enhancing on-board sorting, and promoting port-based monitoring and documentation. In practice, the impact of the landing obligation in Italy varies by segment: for large-scale trawl fleets, especially those targeting demersal species, the LO requires significant operational adaptations. In contrast, many small-scale coastal fisheries already have low discard rates due to more selective practices. The effectiveness of Italy's LO implementation is supported by the electronic logbook (ERS) system and VMS tracking, along with a network of approved ports where landings must be declared. Training and technical support have also been provided through EU funds (including EMFF/FEAMP) to assist fishers in compliance.

# 4 Social, cultural, and economic aspects of fisheries

## 4.1 Fisheries in the national societal context

Although the fisheries and aquaculture sector in Italy represents a marginal share of national GDP—just over 2% within the broader "agriculture, forestry and fishing" sector (ISTAT, 2023)—its social and cultural relevance in coastal areas is significant. Italian fishing communities are deeply rooted in local territories and traditions, especially in regions like Sicily, Veneto, Apulia, and Sardinia, where fisheries contribute to employment, food supply, cultural heritage, and identity.

Small-scale coastal fisheries (SSF) dominate the sector in terms of vessel numbers and community engagement. These fisheries often involve entire families, not only in catching but also in post-harvest operations such as processing, direct sale, and tourism-related services (e.g., fishing tourism and ichthyic-tourism). Such diversification represents an essential strategy for income integration and local development (MIPAAF, 2022; EUCoop, 2022).

Events like local fish festivals, first-sale market days, and cooperative initiatives help maintain a strong connection between fishing communities and consumers, promote local seafood, and encourage generational renewal. In some areas, women play a central role in marketing and managing small ports and cooperatives (CREA, 2022).

At the national level, several initiatives support the integration and revitalisation of fishing communities. The Italian National Fisheries and Aquaculture Programme (PTP 2022–2024) promotes sustainable development, innovation, stakeholder involvement, and youth engagement (MASAF, 2022). Similarly, the 53 Italian Fisheries Local Action Groups (FLAGs), operating under the Community-Led Local Development (CLLD) approach funded by the EMFF, focus on strengthening local fisheries-based economies, encouraging inter-sectoral cooperation, and preserving maritime culture (MIPAAF, 2021).

FLAGs organize training, study visits, and advisory services, especially targeting young entrepreneurs and start-ups. They also promote environmental awareness, social inclusion, and gender equality in fishing areas. Additionally, several regions have implemented educational projects to introduce students to the fisheries sector and its traditions, such as the “Scuole Blu” initiatives or local FLAG-led school engagement programs.

Information and outreach are further supported by institutions, which publishes annual reports and newsletters (e.g., Annuario dell’agricoltura italiana) covering the state of fisheries, socio-economic indicators, and best practices.

Through the EMFF and now the EMFAF, Italy supports not only economic sustainability but also the societal and cultural resilience of its fishing communities, ensuring that local knowledge, traditions, and livelihoods are passed on to future generations.

## 4.2 Social security systems and other social benefits

Italy's social security system provides comprehensive protection to all workers, including those in the fisheries sector[57]. The system is based on mandatory social insurance schemes and social assistance programs aimed at supporting individuals during retirement, unemployment, illness, disability, and in family-related situations. The system is managed and supervised primarily by two national bodies: INPS (*Istituto Nazionale della Previdenza Sociale*), responsible for pensions and most welfare payments, and INAIL (*Istituto Nazionale per l'Assicurazione contro gli Infortuni sul Lavoro*), which manages workplace accident and occupational disease insurance.

The social insurance system includes:

- Public pension schemes, based on a pay-as-you-go system, with contributions paid by employers and workers. It includes:
    - Old-age pensions, accessible upon reaching the legal retirement age and contribution requirements.
    - Invalidity pensions for those with certified disability.
    - Survivors' pensions for family members of deceased workers.
    - Unemployment benefits (NASPI), granted to eligible workers who have involuntarily lost their jobs.
    - Parental benefits, including maternity, paternity, and parental leave.
    - Sickness benefits, for workers temporarily unable to work due to illness or injury.
    - Occupational injury and disease compensation, managed by INAIL.

The social assistance system provides additional support to individuals and families in financial hardship:

- *Reddito di Cittadinanza* (Citizenship Income), a means-tested benefit aimed at ensuring a minimum income and promoting job reintegration.
- Family allowances for households with dependent children.
- Disability allowances and services to promote inclusion and autonomy.
- Housing support, including rental assistance and utility subsidies.

In the fisheries sector, there is no separate social security scheme; fishers are covered under the general system, though with some specific rules. Fishers often contribute under a special INPS regime (*Gestione Speciale Lavoratori del Mare*), which accounts for the seasonal and discontinuous nature of their work. Crew members are insured through this system, and fishing cooperatives or companies act as intermediaries for contributions.

[57] Official sources:
- INPS: https://www.inps.it
- INAIL: https://www.inail.it
- MASAF – FEAMP/EMFAF Programmes: https://politicheagricole.it
- Legislative references: Decreto Legislativo 148/2015 (Unemployment), Legge 92/2012 (Reform of the Labour Market), Legge 197/2022 (Budget Law 2023)

In cases of temporary cessation of fishing activity (e.g. due to biological rest periods, quota reductions, or adverse conditions), financial support is provided through the European Maritime, Fisheries and Aquaculture Fund (EMFAF) and previously the EMFF. These funds, managed at national level by MASAF (Ministry of Agriculture, Food Sovereignty and Forests), allow for compensation schemes for eligible fishers and vessel owners. For example, in recent years, specific calls under EMFF supported income loss during fishing bans or the permanent cessation of activity (e.g., Measure 1.33 and 1.34 of the FEAMP 2014–2020). These are implemented by the Ministry in collaboration with regional authorities and port authorities.

The Coast Guard and Harbour Offices also play a key role in verifying eligibility for aid linked to cessation measures and ensuring compliance with biological rest periods and safety rules. Fishing has unique characteristics that require tailored social protection (Bassotti, 2021):

- Income is highly variable and dependent on environmental and market conditions;
- The sector is fragmented and diverse;
- Workers often face limited access to social and health services;
- On-board work involves specific safety and health risks, and limited work-life balance;
- External factors like EU policies and conservation rules strongly affect activity.

Moreover, in Italy are in force two key laws govern fishers' pensions:i) Law No. 250/1958 – for small-scale fishers (vessels ≤10 gross tons, self-employed or cooperative-based); and ii) Law No. 413/1984 – for maritime workers on larger vessels (industrial fisheries). These laws distinguish between industrial fishing (employees with full labour protections) and small-scale fishing, where workers are often considered self-employed or cooperative members. While this lowers costs for boat owners, it often means limited protections for workers (e.g., reduced access to unemployment or sickness benefits). As regard the labour contracts in fisheries, a major improvement came in 2010 with the introduction of the cooperation contract for small-scale fishing. It added a guaranteed minimum monthly wage, complementing the traditional "pay-per-share" system, where proceeds from fish sales (net of costs) are split between the owner and crew, according to roles on board (e.g., seaman, engineer, captain). Onshore fish workers, including those in fish processing or ittiturismo (fishing-related hospitality), are covered under different contracts tailored to their specific activities (Ferro, 2022).

## 4.3 Education and Training

Italy's education and training system supports lifelong learning and aims to respond to social and economic changes, including the needs of the fisheries and aquaculture sectors. The system is structured across multiple levels—pre-primary, primary, secondary, and higher education—and is aligned with European standards (*Bologna Process*).

In recent years, one of the main challenges in the Italian fisheries sector has been to encourage generational renewal, as the workforce is ageing and the profession often appears unattractive to young people due to economic uncertainty and physical demands. To address this, several initiatives have been launched to promote vocational training and build interest among young people in maritime careers.

At the upper secondary level, the Italian school system includes nautical technical institutes (*Istituti Tecnici a indirizzo Trasporti e Logistica – articolazione Conduzione del mezzo navale e Conduzione di apparati e impianti marittimi*). Some of these institutes offer specialised curricula in fisheries and aquaculture, training future professionals in navigation, fish production, onboard safety, environmental sustainability, and fisheries management. These schools are part of the *Rete Nazionale degli Istituti Nautici*[58], a network that promotes collaboration, innovation, and alignment with the needs of the blue economy.

In addition to formal education, vocational training and lifelong learning opportunities are provided at the regional level, often co-funded through the European Maritime and Fisheries Fund (EMFF) and the current European Maritime, Fisheries and Aquaculture Fund (EMFAF)[59]. These include:

- Professional training courses for young fishers, often integrated into FLAG-led local development strategies;
- On-the-job learning, often organised in collaboration with fishing cooperatives;
- Workshops, seminars and study visits funded through EMFF/EMFAF, targeting young people, unemployed individuals, and those seeking requalification in the blue economy sectors.

The Italian National Fisheries and Aquaculture Programme (PTP 2022–2024) also identifies human capital development and education as strategic priorities. It promotes training in sustainable fishing techniques, fish product processing, marine resource protection, and entrepreneurship in coastal areas.

Moreover, non-formal education plays a growing role. FLAGs (Fisheries Local Action Groups[60]) and regional development agencies promote awareness-raising in schools through initiatives like "Scuole Blu", involving local fishers in educational activities, site visits to ports and markets, and storytelling about fishing traditions and innovations. Together, these measures aim not only to improve skills and qualifications, but also to reconnect younger generations with maritime culture and opportunities, making fisheries and aquaculture more attractive and sustainable career paths.

Training in the fishing sector also relies heavily on informal learning:, indeed:

- Tradition plays a key role: many fishers learn directly from family members or experienced colleagues.
- Schools and professional courses provide technical training on safety, sustainability, and legislation.
- Fisheries associations support ongoing professional development, issue certifications, and represent fishers' interests at institutional levels.

Despite available opportunities, the sector still shows a low average education level. Based on the ISCED 2011 classification:

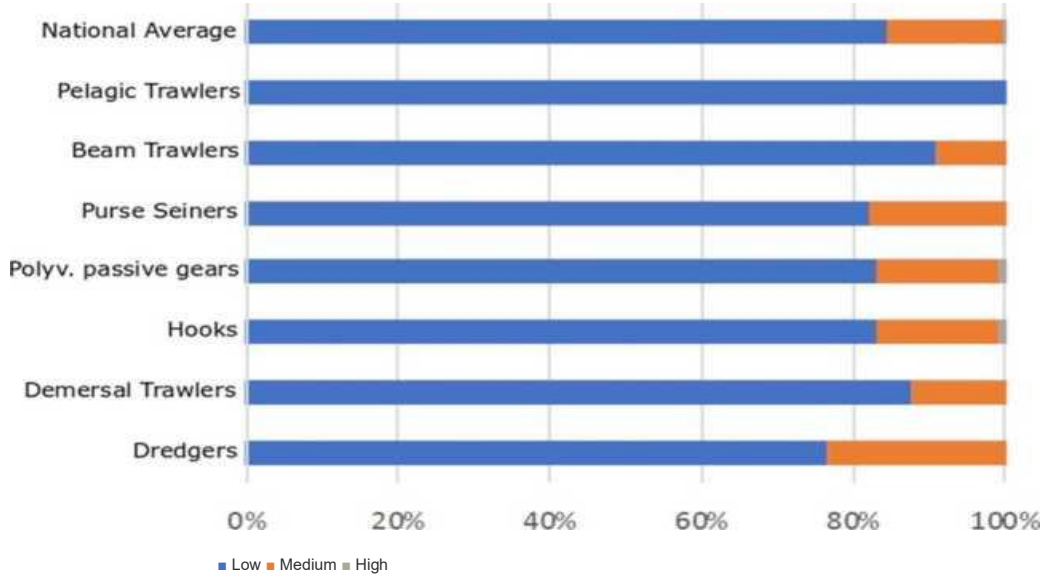
- Most fishers fall within low (ISCED 0–2) or medium (ISCED 3–4) education levels.

[58] Rete Nazionale Istituti Nautici: https://www.retenautici.it
[59] MASAF (2022), Programma Triennale della Pesca e dell'Acquacoltura 2022–2024
MIPAAF (2021), Valutazione PO FEAMP 2014–2020
EMFAF National Operational Programme, https://politicheagricole.it
[60] FLAG project reports, https://www.reterurale.it/fisheries

- Few possess higher education qualifications (ISCED 6–8).

This reflects historical norms where compulsory education ended at age 14. Today, Italian law requires education until age 16, but this change has yet to significantly shift the profile of fishery workers (NISEA–Federpesca, 2023).

*Figure 18* Composition (%) of employees by education level by main fishing technique, total flee – 2021.



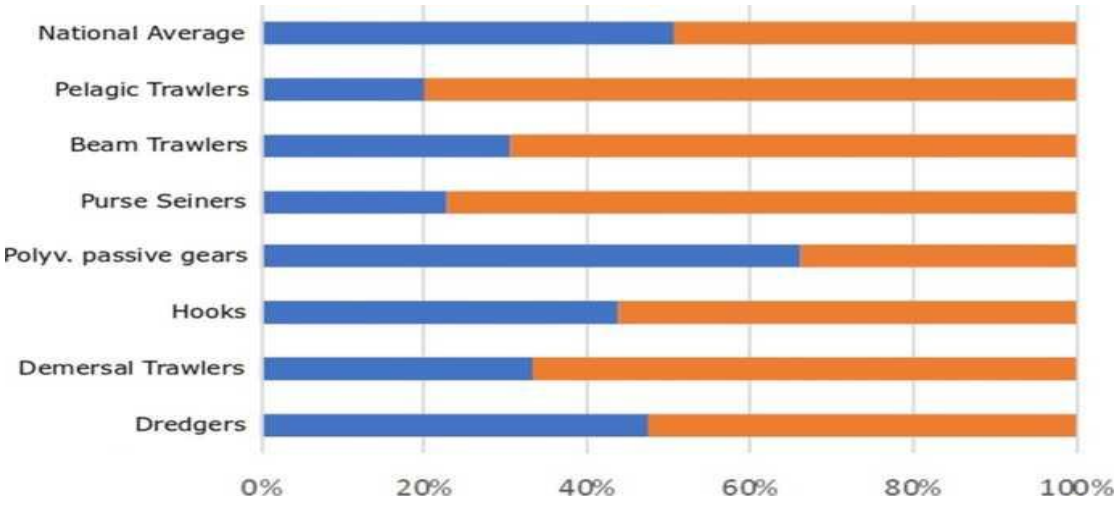

***Source**: NISEA-Federpesca, 2023*

The small-scale fisheries (SSF) segment is characterised by a high number of owner-operators, particularly using polyvalent passive gear. In other segments (e.g. longlines, trammel nets), employment often occurs through cooperatives or consortia, which provide greater social protection and access to collective bargaining. Thus, according to 2021 data:

- The majority of SSF workers are self-employed or cooperative members.
- Industrial segments show a higher rate of formal employment contracts.

This diversity in employment types affects access to social protections, further underscoring the need for continued training and policy support.

*Figure 19* Composition (%) of employed by employment status or owner, total fleet -2021.




***Source**: NISEA-Federpesca, 2023*

## 4.4 Fisheries communities

Italy's fishing communities are dynamic and diversified, shaped by environmental, economic, social and cultural factors. They are not isolated entities, but evolve through their close connection to the sea, their local identity and their shared practices. Their structure encompasses both traditional and modern aspects of fishing, including artisanal, industrial and tourism-related activities.The literature review (Clay P.,Olson L., 2008[61]) reveals some common themes that are relevant for both artisanal and industrial fisheries, and for different geographic locations: (1) a visible presence of the industry (boats, gear, fishing-related businesses) and other infrastructure elements; (2) linkages between on-land and at-sea networks; (3) the frequent role of kinship in the labor process; (4) multiple ties to fishing at the household and family level (with many fishermen, different generations, and gendered fishing-related tasks); and (5) the persistence of a cultural connection to fishing through transitions from small-boat to large-boat, family to industrial, commercial to recreational fishing and even to fishing-related tourism that involves little actual fishing activity.

In Italy, these communities are often defined by maritime compartments (NUTS 3 level), the basic statistical and geographic units for fisheries. Each compartment includes homeports—places where vessels are registered and where fishing-related activities are concentrated. In 2023, there were 273 homeports. However, only one-third had more than 100 vessels, and just 3% exceeded 200 vessels, mainly in Sardinia and Sicily. Over 20% had fewer than three vessels, indicating high fleet fragmentation.

Fleet specialisation varies by region. In Veneto, hydraulic dredges targeting clams and fasolari dominate, especially in the northern Adriatic (EUCoop, 2022). This has shaped local economies, with strong cooperative systems, family involvement, and links to first-sale markets. In Sicily, coastal trawling is more common, with industrial-scale fishing representing a small share. Purse seiners target anchovies, while longliners focus on pelagics like bluefin tuna and swordfish.

[61] Clay P.M, Olson J. (2008). Defining Fishing Communities: Issues in Theory and Practice. National Association for the Practice of Anthropology Bulletin 28(1):27 – 42. https://doi.org/10.1525/napa.2007.28.1.27

Local Labour Systems (LLS) that overlap with coastal municipalities often show strong fishing specialisation (Coppola et al., 2020[62]). Notable examples include Mazara del Vallo (Sicily) and Chioggia (Veneto).

Fishing communities are deeply connected to ports. Italy has about 700 ports (351 considered "main ports", 58 of national relevance). According to EUMOFA (2023), 328 ports are used for fishing. Ports are classified as either military/security or economic (international, national, or regional relevance) and serve multiple functions—commercial, industrial, passenger, recreational, and fishing.

In 2016[63], port governance was restructured into 15 Port Authority Systems, giving more autonomy to regional and local administrations. However, maritime spatial planning (MSP), required by Directive 2014/89/EU and implemented in Italy by Legislative Decree No. 201/2016, is still under public consultation.

Data fragmentation makes it difficult to assess the exact role of each port. In 2011[64], out of 13,201 vessels, 50 ports had fewer than 10 vessels, and 6 had only one. By 2022, the number of fishing vessels dropped to 11,807 (MASAF, 2022), due to CFP measures to reduce fleet capacity.

At the regional level, Sicily leads national landings (16.1% by weight, 22.1% by value), followed by Marche, Veneto, and Emilia-Romagna. Apulia also ranks high in value despite lower catch volume.

In 2022, Italy recorded 83,029 tonnes in first-sale landings, worth EUR 374 million. The top three ports by value were Mazara del Vallo (EUR 43 million), Porto Tolle (EUR 29 million), and Chioggia (EUR 24 million), together accounting for 17% of the total volume and 26% of total value.

*Table 5: Main Italian ports by number of fishing vessels- 2011*

| PORT NAME | REGION | VESSELS No |
|---|---|---|
| **ORISTANO** | SARDINIA | 334,00 |
| **GORO** | EMILIA-ROMAGNA | 325,00 |
| **PORTICELLO** | SICILY | 262,00 |
| **MANFREDONIA** | APULIA | 259,00 |
| **CHIOGGIA** | VENETO | 253,00 |
| **MAZARA DEL VALLO** | SICILY | 243,00 |
| **SANT'ANTIOCO** | SARDINIA | 230,00 |
| **MARANO LAGUNARE** | FRIULI VENEZIA GIULIA | 229,00 |

[62] Coppola, Gianluigi and Gambino, Monica and Paolucci, Carlo and Restaino, Marialuisa (2020): Analisi delle strutture produttive e delle caratteristiche socio-economiche delle marine italiane. Published in: The Nisea Press (2020), downloadable at https://mpra.ub.uni- muenchen.de/114239/

[63] Legislative Decree 4 August 2016 n. 169

[64] https://sustainable-fisheries.ec.europa.eu/socio-and-economic-analysis/studies/coastal-communities_en, accessed on 4 February 2024

| PORT NAME | REGION | VESSELS No |
|---|---|---|
| **ANCONA** | MARCHES | 216,00 |
| **GALLIPOLI** | APULIA | 200,00 |
| **TOTAL** | | **2.551,00** |

***Source***: Adapted from available data on https://sustainable-fisheries.ec.europa.eu/socio-and- economic-analysis/studies/coastal-communities_en

Ancillary or related activities support the fishing sector by providing services and products linked directly to fishing operations, often performed by family members or retired fishers. These include: i)Servicing of vessels and gear; ii) Fish sales up to the first point of sale; iii) Operational supplies; iv) R&D and innovation services; v) Fishing tourism and hospitality services (*ittiturismo*). In coastal communities like *Porto Garibaldi*, women play an essential role, managing first-sale markets and even operating fishing vessels. Such markets are often social and cultural hubs, hosting events and daily activities, and strengthening community bonds. Italy is among the EU Member States with the highest employment rates in ancillary fisheries activities, alongside Spain and Greece. In 2014, the sector employed an estimated 6,538 FTEs, distributed as follows: a) 53% servicing equipment/vessels, b) 24% fish sales, c) 16% operational supplies, d) 6% R&D and innovation. Despite a modest 2% increase in employment between 2009 and 2014, overall income dropped by 40%, reflecting sectoral distress and declining profitability. Italy ranked 4th in the EU for ancillary fisheries income at the time, after Spain, France, and the UK. These activities are crucial for rural and coastal livelihoods, yet they often remain underpaid or informal, particularly for women, whose roles in small-scale or family-run operations—such as fish markets, administration, and marketing—are often undervalued and insufficiently recognized. Thus, ancillary activities, though secondary, are essential to sustaining Italy's fisheries economy and culture. They provide employment, especially for women and older workers, and represent an entry point for innovation and youth involvement. However, they are increasingly vulnerable to economic uncertainty and require targeted support to remain viable and socially.

# 5. Current trends, issues and development

## 5.1 PESTLE

A comprehensive overview of the Political, Economic, Social, Technological, Legal, and Environmental factors influencing the Italian fishing sector is provided in the PESTLE table above. It highlights Italy's strengths in heritage, regulation, and sustainability, while also reflecting structural weaknesses such as ageing fleets and workforces, and the growing pressures of climate change and international competition.

*Table 6: PESTLE analysis of the Italian fishing industry through the provision of SWOT*

| FACTORS | STRENGTHS (S) | WEAKNESSES (W) | OPPORTUNITIES (O) | THREATS (T) |
|---|---|---|---|---|
| **POLITICAL FACTORS** | Strong national legislation, alignment with CFP and EMFAF, local FLAGs governance | Fragmentation of administrative responsibilities; delays in Maritime Spatial Planning | FLAGs and local strategies for integrated coastal development | Geopolitical tensions affecting seafood trade; declining trust in institutions |
| **ECONOMIC FACTORS** | High-quality seafood tradition; strong processing sector; PO system in place | Ageing fleet; high operating costs; limited profitability in SSF | Value-added products, certified chains, Blue Economy diversification | Rising fuel and energy prices; global import competition |
| **SOCIAL FACTORS** | Rich fishing heritage and cultural identity; strong role of women in ancillary activities | Ageing workforce; low attractiveness to youth; low education levels | Youth education, school programmes, lifelong learning to attract new entrants | Depopulation of coastal villages; risk of losing traditional practices |
| **TECHNOLOGICAL FACTORS** | Growing use of digital tools; innovation in gear and vessel modernization | Low adoption of innovation in small-scale fleets; outdated infrastructure | Funding for fleet modernization, energy efficiency and digital transition | Technological lag increasing gap between small and large operators |
| **LEGAL FACTORS** | Robust legal framework for fisheries, labour protection and traceability | Complex regulatory environment burdens small-scale fishers | EMFAF tools to simplify compliance and incentivise sustainable practices | Stricter regulations could disproportionately impact small enterprises |
| **ENVIRONMENTAL FACTORS** | Marine biodiversity hotspots; integration of sustainability in Blue Economy | Overfishing risks, habitat degradation; high vulnerability to climate change | Investments in climate resilience, marine protected areas, ecosystem-based management | Rapid climate change affecting fish stocks and marine ecosystems |

## 5.2 Others

Over the past decade, the Italian fishing sector has undergone profound structural and socio-economic changes, reflecting broader national and EU policy shifts. The fleet has contracted by over 9.5%, particularly among larger vessels involved in industrial fishing, primarily due to the implementation of Common Fisheries Policy (CFP) measures, rising operational costs, and the declining profitability of certain fleet segments. Employment has decreased by 5%, and the sector now faces an ageing workforce and outdated vessels—many over 30 years old—which significantly limits competitiveness and safety at sea. These structural weaknesses are particularly acute in the small-

scale fisheries (SSF) segment, which dominates the Italian fleet numerically and operates mostly at the local level.

Italian ports remain strategic nodes for the fisheries economy and for coastal communities. In 2022, Italy recorded 83,029 tonnes of first-sale landings, generating EUR 374 million. Key landing ports include Mazara del Vallo, Porto Tolle, and Chioggia, which together accounted for a notable share of national value and volume. At the regional level, Sicily, Marche, and Veneto continue to lead in terms of landings, confirming their long-standing role in national seafood supply chains and associated economic activity.

Ancillary activities linked to the fisheries sector—such as gear repair, fish marketing, hospitality services (like fishing tourism or *ittiturismo*), and maintenance services, represent an essential complement to primary fishing activities. These activities provide over 6,500 FTE jobs and are often sustained by family networks. Women, in particular, play a crucial yet often *invisible role*, especially in small-scale fisheries, managing administrative tasks, market relations, and direct sales. Italy, alongside Spain and Greece, accounts for the majority of employment in this sector at the EU level. However, the declining profitability and attractiveness of these roles, especially among younger generations, pose long-term challenges for continuity.

At the same time, marine recreational fishing (MRF) is expanding rapidly, involving up to 1.6 million people and generating significant catches, estimated at over 22,000 tonnes annually, and economic value exceeding EUR 600 million. While MRF offers opportunities for marine tourism and community engagement, it also raises ecological concerns, especially for certain overexploited stocks. Recognising this, the *Ministry of Agriculture, Food Sovereignty and Forests* (MASAF) has initiated important governance tools, including mandatory online registration with digital identification, licensing differentiated by species (e.g. swordfish, bluefin tuna), and public guidelines co-developed with stakeholders. These steps mark a key turning point in managing a historically informal sector and integrating recreational fishing into the broader fisheries governance framework.

Overall, the Italian fisheries system today reflects a complex interplay between tradition and innovation, facing challenges such as structural fragmentation, limited generational turnover, and climate vulnerabilities, but also showing resilience through territorial embeddedness, local knowledge, and emerging niches in sustainable and multifunctional fisheries.

## 5.3 Future research questions

Looking to the future, the Italian fisheries sector is facing a series of interlinked challenges that require targeted research and coordinated policy responses. These include the dual issues of an ageing workforce and an

outdated fleet. With vessels averaging over 30 years old and younger generations showing limited interest in the sector, it is crucial to develop strategies that combine fleet renewal with initiatives to attract and retain new talent. This involves exploring tailored financial tools, modern vocational training and cooperative models to ensure generational continuity.

Meanwhile, the growing importance of marine recreational fishing (MRF) demands closer scrutiny. With an estimated 1.6 million participants and significant catch volumes, MRF affects both ecosystems and the professional sector. Future research should focus on incorporating MRF into marine governance through shared stock management, digital licensing and participatory monitoring, while balancing ecological protection with socio-economic opportunities, such as marine tourism.

Equally vital is the integration of circular economy (CE) principles into the blue economy. Applying CE approaches, such as waste reduction, material reuse and energy efficiency, can strengthen the sustainability of the fisheries value chain. Priority areas include adopting biodegradable gear, retrofitting vessels, and creating recovery systems for marine litter. Involving small-scale fishers and coastal communities in these efforts could also unlock new circular value streams through recycling and eco-innovation.

Finally, climate change poses systemic risks by altering species distribution, increasing operational uncertainty and raising fuel demands. Investigating these effects, particularly on small-scale fleets, is crucial for developing adaptive management strategies.

To address these challenges, a multidisciplinary approach embracing innovation, inclusivity and sustainability is required. Future research should support the development of a resilient, more modernised fisheries sector that meaningfully contributes to Italy’s broader ecological and socio-economic goals.

# REFERENCES

Below are the main literature and digital sources consulted. Numerous literature sources have been directly included as footnotes in the paragraphs that refer to them. In addition, for all sources, where available, links for consulting the documents in digital format have been included. All websites have been verified and were working as of the date of finalisation of this report.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## ANNEX I

*Organizzazioni di Produttori del pesce e/o dell'acquacoltura riconosciute*

Regolamento (UE) n. 1379/2013, articolo 14 e Regolamento (UE) n. 1419/2013

| DENOMINAZIONE | DECRETO DI RICONOSCIMENTO | GAZZETTA UFFICIALE DELLA REPUBBLICA ITALIANA |
|---|---|---|
| DOMAR - Associazione Produttori Pesca Marittima, s.c.r.l. | D.M. 08.04.1977 | |
| Associazione Produttori Pesca soc. coop. a r.l. | D.M. 8.04.1977 | |

| DENOMINAZIONE | DECRETO DI RICONOSCIMENTO | GAZZETTA UFFICIALE DELLA REPUBBLICA ITALIANA |
|---|---|---|
| Associazione Produttori Tonnieri del Tirreno soc. coop. | D.M. 23.11.1977 | |
| San Marco Associazione Produttori Pesca, s.c.r.l. | D.M. 02.12.1980 | |
| Consorzio Linea Azzurra | D.M. 06.12.2001 | n. 6 del 8.01.2002 |
| Produttori della Pesca di Civitanova Marche soc. coop. a r.l. | D.M. 14.03.2002 | n. 82 del 8.04.2002 |
| Produttori della Pesca di Fano, Marotta e Senigallia O.P.PE.F.S. soc. cons. a r.l. | D.M. 14.03.2002 | n. 82 del 8.04.2002 |
| Produttori Armatori e Operatori della Pesca di Cesenatico soc. coop. | D.M. 14.03.2002 | n. 82 del 8.04.2002 |
| Produttori ittici del Sud Adriatico, soc. coop. a r.l. | D.M. 14.03.2002 | n. 81 del 6.04.2002 |
| Produttori della pesca di fasolari dell'Alto Adriatico | D.M. 27.03.2003 | n. 88 del 15.04.2003 |
| Produttori Molluschi Associati – Friuli Venezia Giulia PMA-FVG | D.M. 31.07.2003 | n. 202 del 1.09.2003 |
| Coop. Pescatori “La Sirena” | D.M. 31.07.2003 | n. 205 del 4.09.2003 |
| Consorzio delle Cooperative Pescatori del Polesine, soc. coop. a r.l. | D.M. 23.07.2004 | n. 200 del 26.08.2004 |
| Cooperativa Pescatori di Pila, soc. coop. a r.l. | D.M. 10.03.2005 | n. 79 del 06.04.2005 |
| Bivalvia Veneto – Organizzazione di Produttori Molluschi bivalvi Mare Veneto, soc. coop. | D.M. 07.02.2006 | n. 42 del 20.02.2006 |
| Associazione Civitanovese Produttori Ittici | D.M. 19.12.2008 | n. 7 del 10.01.2009 |
| Il Gambero e la Triglia del Canale, s.c.a.r.l. | D.M. 29.09.2009 | n. 242 del 17.10.2009 |
| Organizzazione di Produttori della Pesca di Trapani - Consorzio di Società cooperative a r.l. | D.M. 29.09.2009 | n. 243 del 19.10.2009 |
| Produttori della Pesca San Basso, soc. coop. | D.M. 03.03.2010 | n. 72 del 27.03.2010 |
| Produttori della Pesca del Tonno con il Sistema Palangaro | D.M. 02.04.2010 | n. 97 del 27.04.2010 |
| Organizzazione di Produttori e pescatori di vongola della sacca di Goro e Gorino | D.M. 20.04 2011 | n. 111 del 14.05.2011 |

| DENOMINAZIONE | DECRETO DI RICONOSCIMENTO | GAZZETTA UFFICIALE DELLA REPUBBLICA ITALIANA |
|---|---|---|
| Vongola di Goro | D.M. 20.04.2011 | n. 111 del 14.05.2011 |
| Organizzazione di Produttori della Pesca di Trapani e delle Isole Egadi, soc. coop. a r.l. | D.M. 06.08.2012 | n. 191 del 17.08.2012 |
| Abruzzo Pesca, soc. coop. | D.M. 06.08.2012 | n. 191 del 17.08.2012 |
| Cooperativa della Piccola Grande Pesca, soc. coop. | D.M. 15.02.2013 | n. 53 del 04.03.2013 |
| Cooperativa di pesca “Marinai e Caratisti" di Civitavecchia, soc. coop. a r.l. (L) | D.M. 24.04.2013 | n. 108 del 10.05.2013 |
| Organizzazione di Produttori della Vongola e dei Molluschi di Rimini, soc. coop. | D.M. 12.06.2013 | n. 147 del 25.06.2013 |
| Organizzazione di Produttori di Pesce Azzurro Ancona, soc. coop. | D.M. 19.11.2014 | n. 280 del 02.12.2014 |
| Cooperativa Pila Mare, soc. coop. | D.M. 25.03.2013 | n. 80 del 05.04.2013 |
| Organizzazione di Produttori Cittadella della Pesca, soc. coop. | D.M. 22.10.2015 | n. 261 del 09.11.2015 |
| Organizzazione di Produttori Vongole Costa del Teramano (VOCOTER), soc. coop. a r.l. | D.M. 29.10.2015 | n. 263 del 11.11.2015 |
| Organizzazione di Produttori ittici Labronica Pesce, s.c.a.r.l. | D.M. 04.08.2016 | n. 220 del 20.09.2016 |
| Organizzazione di Produttori Acquacoltura Orbetello, soc. cons. a r.l. | D.M. 07.12.2016 | n. 302 del 28.12.2016 |
| Organizzazione di Produttori Cooperativa Pescatori di Grado, soc. coop. a r.l. | D.M. 25.07.2017 | n. 185 del 09.08.2017 |
| Organizzazione di Produttori della pesca Thunnus Thynnus, soc. coop. | D.M. 25.07.2017 | n. 185 del 09.08.2017 |
| Consorzio Pescatori di Goro (COPEGO), soc. coop. | D.M. 03.08.2018 | n. 190 del 17.08.2018 |
| La Perla del Tirreno, soc. cons. a r.l. | D.M. 21.12.2018 | n. 7 del 09.01.2019 |
| Acquacoltori Costa Dei Trabocchi, soc. coop. a r.l. | D.M. 06.08.2019 | n. 197 del 23.08.2019 |

| | | |
|---|---|---|
| Avannotteria Siciliana, soc. cons. a r.l. | D.D. 23.10.2020 | n. 272 del 31.10.2020 |
| V.ITA Tonno - Organizzazione Di Produttori Ittici, cons. a r.l. | D.D. 22.12.2020 | n. 6 del 9.01.2021 |
| Organizzazione Produttori Allevatori Ittici Friulani (O.P.A.I.F.), soc. coop. | D.D. 27.01.2021 | n. 32 del 8.02.2021 |
| La Concordia, soc. coop. | D.D. 13.04.2021 | n. 98 del 24.04.2021 |
| Mytilus Campaniae, soc. cons. | D.D. 18.05.2021 | n. 123 del 25.05.2021 |
| Associazione Produttori Pesca, soc. coop. per azioni | D.D. 06.12.2021 | n. 297 del 15.12.2021 |
| Consorzio Produzione Molluschi Regione Campania | D.D. 18.05.2022 | n.123 del 27.05.2022 |
| Organizzazione di produttori ASTRO - Associazione troticoltori trentini, soc. coop. agricola | D.D. 08.06.2022 | n. 140 del 17.06.2022 |
| Cooperativa Pescatori San Vito, soc. coop. | D.D. 08.06.2022 | n. 140 del 17.06.2022 |
| Organizzazione Di Produttori Del Pesce Società Consortile a r.l. | D.D. 05.07.2022 | n. 163 del 14.07.2022 |
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