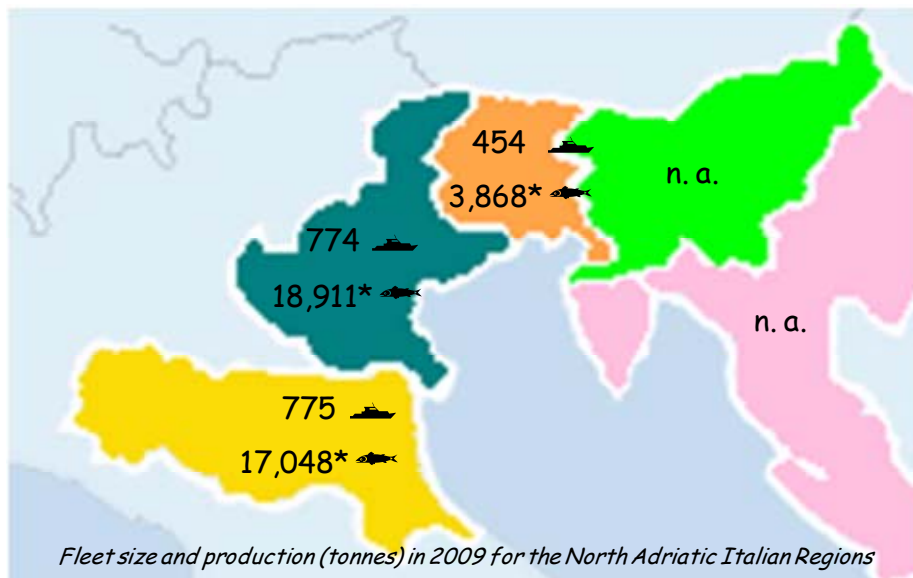


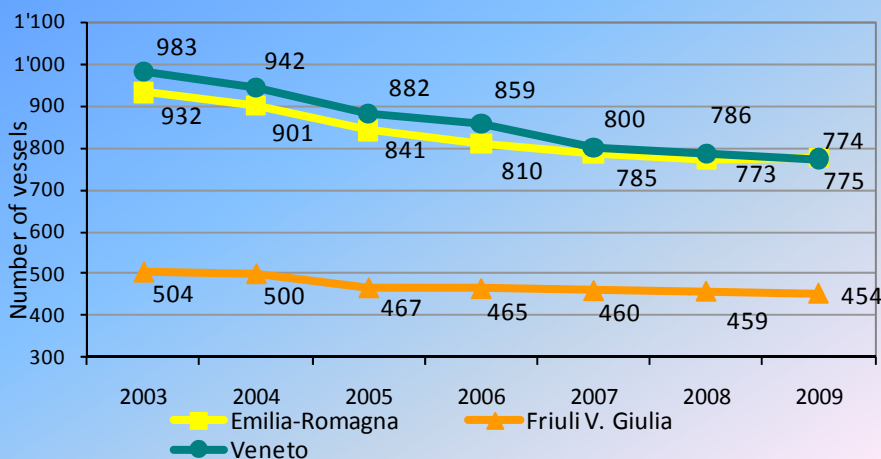
### PRELIMINARY EVALUATIONS OF THE 2009 FISHING YEAR



This issue highlights the basic aspects of sea and lagoon fishing in 2009, leaving a more detailed analysis of the different features that characterize this sector for future issues of "Fishing in Figures". The data discussed concerns the fleet, businesses, prices and sales; production data is limited to the first nine months of 2009. The final 2009 data for Croatia and Slovenia, collected by the respective national institutes of statistics, will be available in June 2010. As a whole, 2009 was significantly more productive than 2008, when the fuel crisis led to decreased activity and production. In

2009 however, the clam "crisis", which appears cyclically, had an impact on total production.

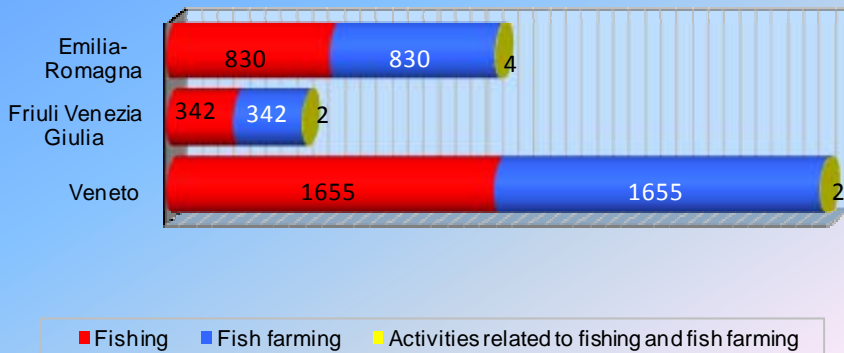
Evolution of the Fleet in the North Adriatic Italian Regions



The declining trend in the size of the North Adriatic fleet continued in 2009 (-0.7%), although the figure did stabilize considerably. The number of boats in Friuli Venezia Giulia decreased by 4, while the number in the Veneto dropped by 12. According to data from the EU Fleet Register, the only region to record an increase in the number of boats was Emilia-Romagna, which added 2 fishing vessels. The fleet's overall power decreased slightly to 191,000 kW, while the average length of the fishing boats in the North Adriatic increased to 10.45 m.

Source: Data processed by the Socio-Economic Fishing and Aquaculture Observatory based on EU Fleet Register data

### Active Businesses Operating in the Fishing and Fish Farming Sector in the North Adriatic Italian Regions - 2009



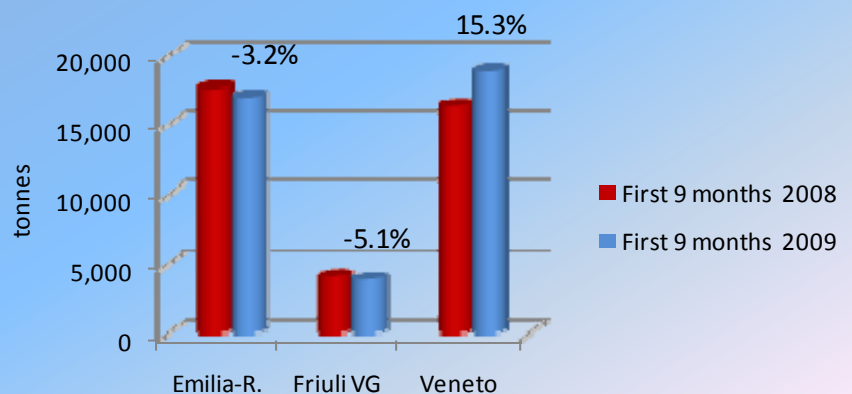
In 2009, a total of 5,396 businesses were operating in the fish and seafood sector in the Upper Adriatic regions. 2,827 of these were registered as professional fishing companies, while 2,561 were aquaculture companies.

Veneto had the largest number of active businesses (3,044), followed by Emilia-Romagna (1,922). Both of these regions recorded a 3.3% increase in the total number of businesses. Aquaculture predominated in Emilia-Romagna, with 1,088 companies operating in the sector, while fishing was the most important activity in Veneto and Friuli Venezia

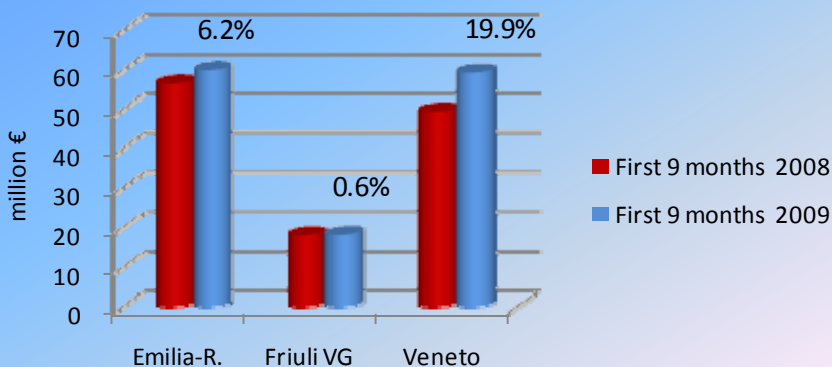
Giulia. There were 430 companies operating in Friuli Venezia Giulia, representing a slight decrease (-0.9%) with respect to the previous year.

The IREPA (Economic Research Institute for Fishing and Aquaculture) data available for the first nine months of 2009 shows a 5% overall increase in production for the North Adriatic with respect to 2008. Nevertheless, Veneto was the only region to record an increase in catches, which was quite considerable - as of September 2009 the figure was 15% higher than the same period in 2008. Friuli Venezia Giulia and Emilia-Romagna on the other hand recorded a drop in production of 5% and 3% respectively.

### Catches of the North Adriatic Italian Fleet during the First Nine Months of 2008/2009



### Revenues for the North Adriatic Italian Fleet during the First Nine Months of 2008/2009

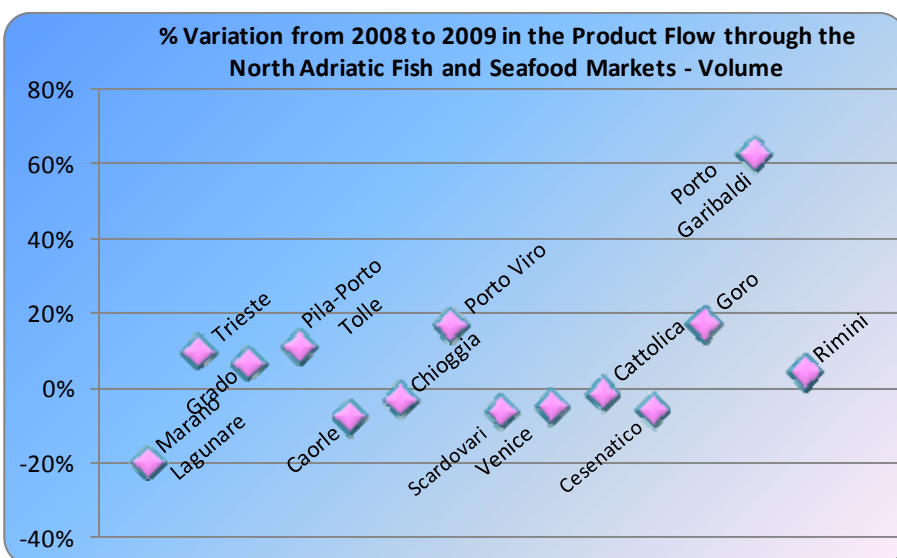
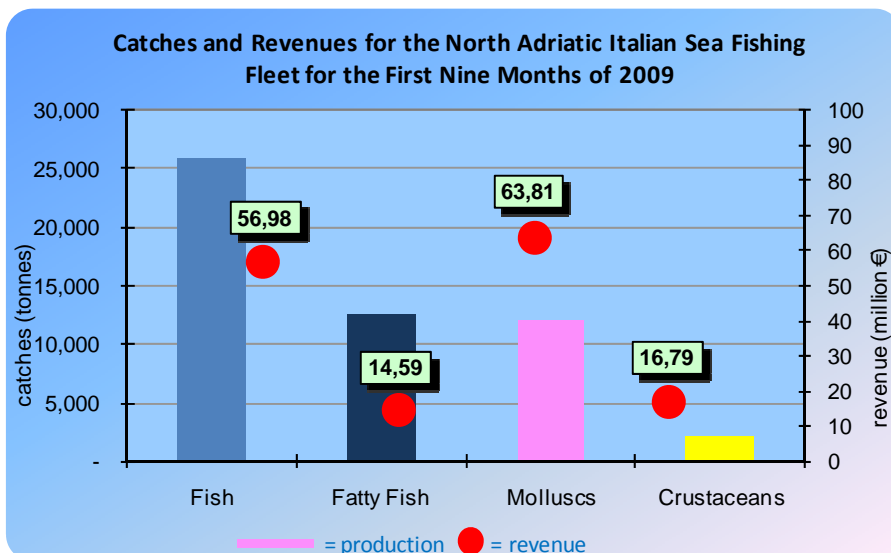


As a whole, revenues in the Upper Adriatic rose by 11% as of September 2009 compared to the same period in 2008.

There was a significant increase in revenues in Veneto (+ 20%), and a moderate increase in Emilia-Romagna (6.2%). In Friuli Venezia Giulia however, only a 0.6% increase was recorded. Given the decrease in production in the latter two regions, the increase in revenues is due to either an increase in prices or a proportional increase in the production of valuable fish species.

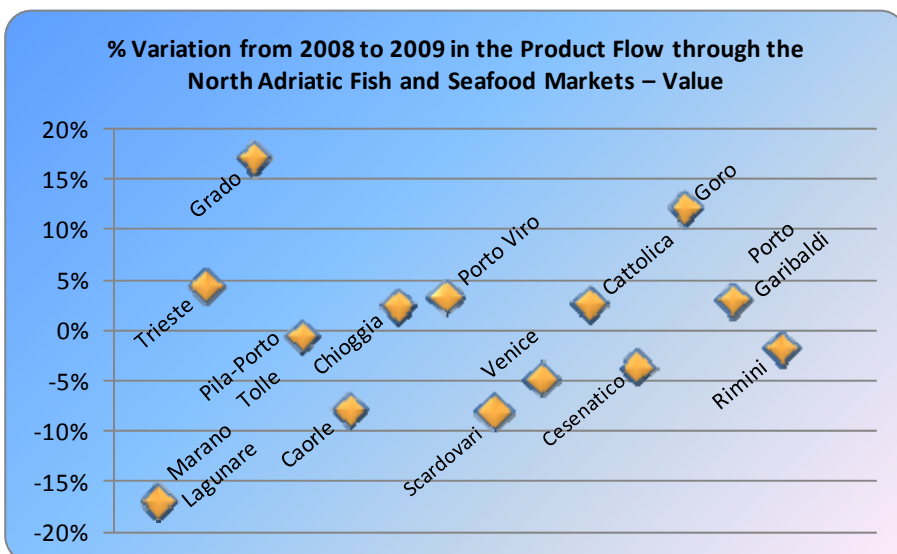
Source: Data processed by the Socio-Economic Fishing and Aquaculture Observatory based on Infocamere and Irepa data

Examining the data for the individual regions, using once again the figures for the first 9 months of 2009, fatty fish represented approximately half of the total fish production. More specifically, the total fish production was 25,756 tonnes, with a revenue of approximately 57 million euros. 11,949 tonnes of molluscs were produced, with a revenue of approximately 64 million euros. Finally, 2,126 tonnes of crustaceans were harvested, with sales of almost 17 million euros.



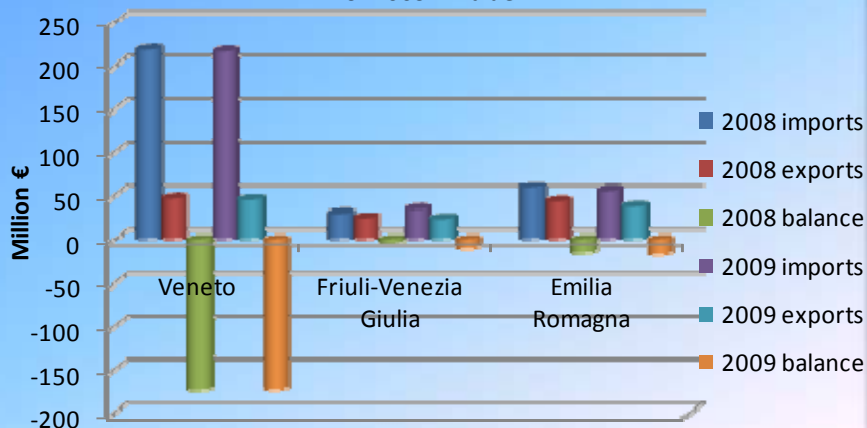
The processed 2009 data for fish and seafood markets demonstrates a certain amount of variability with respect to volume; however, only a slight increase in the volume (1%) was recorded on average. The changes in 2009 with respect to the previous year range from a significant decrease for Marano Lagunare (-20%) to a considerable increase for Porto Garibaldi (+62%). Porto Garibaldi's large increase in catches was due to the addition of a new fishing boat to the fleet, which catches lesser fish species having moderate value (thinlip mullet, golden grey mullet, goby, etc.).

Total revenues for the 14 Upper Adriatic fish and seafood markets were approximately 165.8 million euros, representing a 1% decrease in the overall average with respect to 2008. The Marano Lagunare market recorded the largest decline in sales, with a sizeable drop of 17%. The Grado and Goro markets showed significant increases of 17% and 12% respectively. The revenues for the Venice (54 million euros) and Chioggia (46.4 million euros) fish and seafood markets in Veneto were particularly noteworthy.



Source: Data processed by the Socio-Economic Fishing and Aquaculture Observatory based on data from IREPA and the fish and seafood markets

### Trade Balance for the North Adriatic Fish and Seafood Sector for 2009\* - Value



\*Provisional data

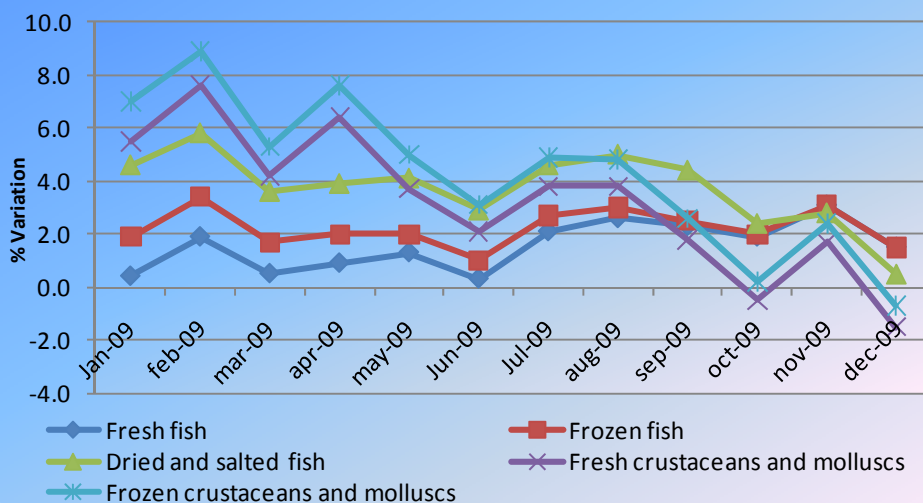
In conclusion, in recent years the fish and seafood trade balance for Veneto has remained very stable, with a deficit of approximately 171 million euros.

The import/export figures for the regions of Emilia-Romagna and Friuli Venezia Giulia were on an entirely different scale, with deficits equalling 6-10% of that of Veneto.

The negative trade balance for Friuli Venezia Giulia also rose compared to 2007 levels, increasing from 5 million euros to 11 million euros in 2009, a change of almost 127%. The deficit for Emilia-Romagna grew by approximately 10% to 17.8 million euros.

The national consumer price indexes for fish and seafood products show a change (with respect to the same month in the previous year) of more than 2% on average for all types of products, except for fresh fish, which fluctuated but remained below 2% in 2009. At the end of the year, there was a tendency for the prices to realign with 2008 levels.

### National Consumer Price Index – Trends



Source: Data processed by the Socio-Economic Fishing and Aquaculture Observatory based on ISTAT data



**European Maritime Day:** the European Commission and the Spanish presidency of the EU are organizing an important conference for operators in the maritime sector from 8 to 21 May 2010 in Gijon (Spain).

**For more information:** [http://ec.europa.eu/maritimeaffairs/maritimeday/index\\_en.html](http://ec.europa.eu/maritimeaffairs/maritimeday/index_en.html)

The meeting of the **European Fishing Ministers** will be held on 4-5 May in **Vigo** (Spain). It was originally scheduled for Monday, 19 April in Luxembourg, but was canceled due to airspace closures in Northern Europe. On the agenda: reform of the Common Fisheries Policy.



**In the next issue:**  
The prices of North Adriatic fish and seafood products

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