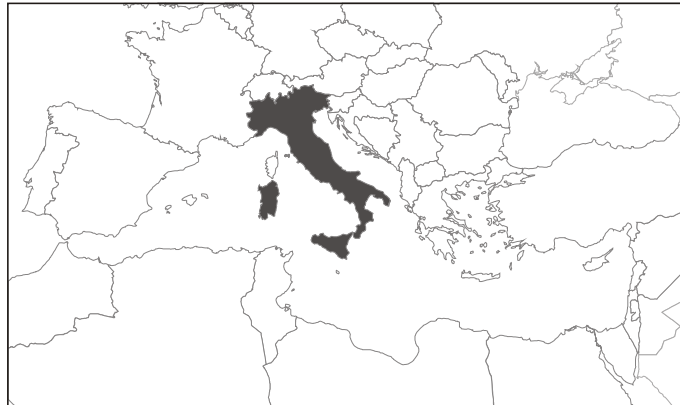


ITALY

Whole country

In the early 1990s, Italy entered a period of very low population growth, with near-zero natural increase, due to a pronounced fertility decline, which has been below-replacement since 1975. Italy's fertility level is now among the lowest in the world, at 1.26 children per woman in 1991, and only 1.37 in 2000. A projected modest recovery to 1.50 by 2025 will not be enough to halt

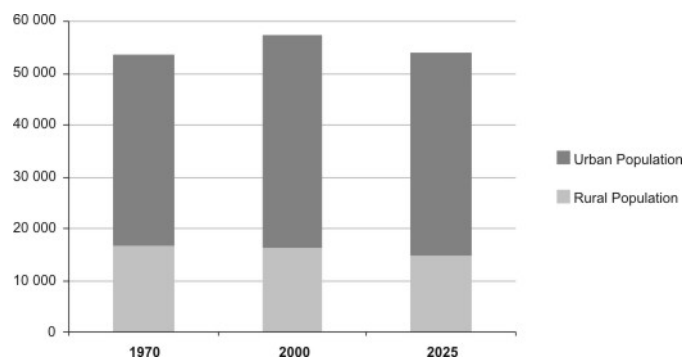


population decline. Italy's population of 57.5 million people in 2000 is 2.5 million more than in the 1991 census, representing a period mean annual rate of growth of 4.7 per thousand. Italy's present population size may be roughly level-pegging with France (just two million short), but not for much longer. By 2025, it will have only 53.9 million people, while France will have more 10 million at the same date. The Italian population will increase slightly until 2005, when it will start to decline. As a result, Italy is set to lose 3.67 million people between 2005 and 2025, despite fairly substantial net annual immigration of 35 000 people.

Population change in Italian urban areas of over 10 000 people will roughly mirror that of the total population, declining from 2010 and losing 2 million people over the period 2000-2025. But its relative share will continue to grow, from accounting for 71.6% of the total population in 2000, to 72.5% in 2025.

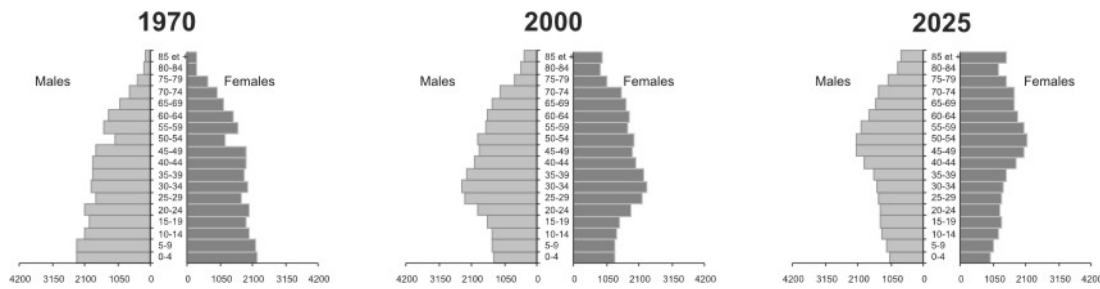
The population of urban areas of over 10 000 people will be less affected by population decline than the rest of the population, decreasing at a slower rate over each five-year period to 2025.

Figure 22. Rural population and urban population 1970-2000-2025 (in thousands)



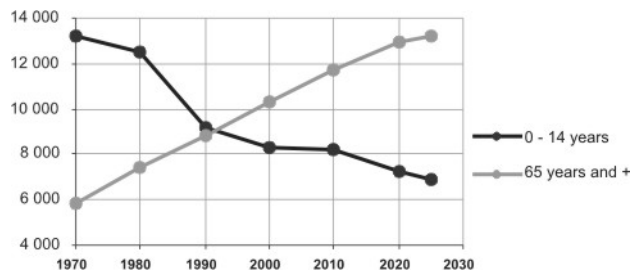
Fertility decline will have far-reaching effects on Italy's age structure by 2025. In 2000, the 10.3 million people aged 65 and over accounted for 18% of the total population. By 2025, this will have risen to 13.2 million people - a quarter (24.6%) of the total. The population aged 15-64 - the potential labour force - will shrink from 38.8 to 33.8 million between 2000 and 2025, losing 5 million people at the annual rate of -5.5 per thousand.

Figure 23. Population age structure (by 5-year age groups) 1970-2000-2025 (in thousands)



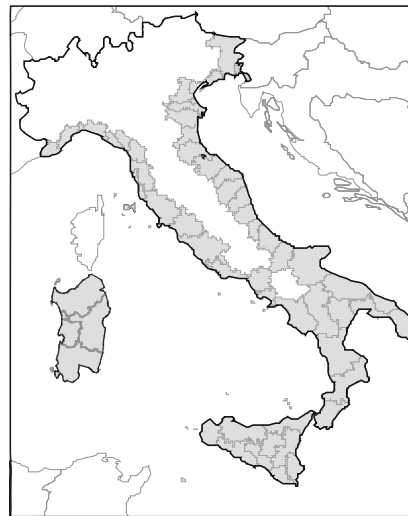
In strict population terms, Italy’s labour supply will be in deficit from 2005, with 37 000 more exits than entries. The situation will abate in 2015, but the deficit will not be stemmed by 2025.

Figure 24. Populations aged 15-and-under and 65-and-over, 1970-2025 (in thousands)



Mediterranean coastal regions

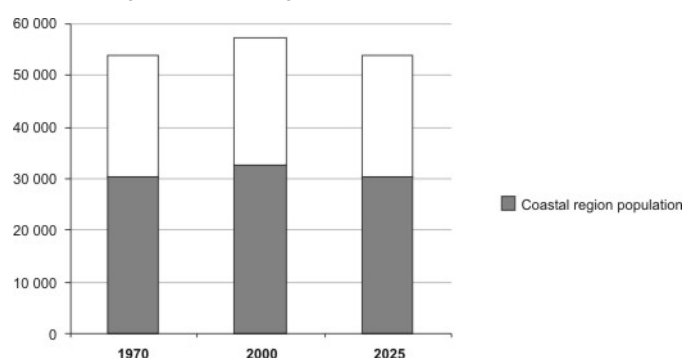
A coastal population of 32.837 million people in 2000 makes Italy the region’s most “Mediterranean” country at present. This coastal population is divided between 54 provinces (NUTS 3), 6 of which have over a million people and 14 more than 500 000. It grew slowly over the period 1970-1995, rising from 30.339 million in 1970 to 32.878 million in 1995, i.e., an annual growth rate of just 0.3%. Also, growth was positive only up to 1990, and has recently dipped below zero. Despite that, Italy’s Mediterranean regions, which account for 57% of its total population, grew at a slightly faster rate than the rest of the country (0.26%) from 1970 to 2000, although the situation has



now reversed slightly in favour of the interior, especially Lombardy. Whereas Rome - the most populated province (3.775 million in 1995) - has experienced just above-average growth (0.4%), on a par with Palermo (1.240 million people), Naples (3.098 million), Bari (1.560 million), Catania (1.088 million) and Salerno (1.086 million) have grown at rates double (0.6%) the average of the coastal provinces. Among the less-populated provinces, Genoa (933 000 people in 1995) is in the worst plight with negative growth of -0.6% a year between 1970 and 1995. The populations of Reggio di Calabria and Udine were level over the period, while the City of Venice is still losing population to Mestre.

In the next 25 years, Italy’s Mediterranean coastal and inland populations will both decline, but at different rates. The coastal population will fall from 32.837 million in 2000 to 30.291 million in 2025, losing 2.546 million people, i.e., a negative growth rate of -0.32%, and double that of the -0.16% for the inland population. The coastal population’s share of the total population will decrease slightly from 57.2 to 56.2%.

Figure 25. Mediterranean coastal regions population as a share of total population 1970-2000-2025 (in thousands)



Italy's Mediterranean coasts are dotted with 525 urban areas which have at some point had over 10 000 people. They grew more quickly than the inland urban areas from 1970 to 2000: 0.43% and 0.18% respectively. So, the population of Mediterranean urban areas of over 10 000 people rose from 22.331 million in 1970 to 25.198 million in 1995. A rate of growth outstripping the aggregated coastal regions rate increased the urbanization rate from 73.6% to 76.6%.

Of all the Mediterranean rim's most populated urban areas (13 with over 200 000 people in 1995), Naples and Rome are by far the largest, but exhibiting different trends. Rome's population remained virtually unchanged over the period from 2.849 million people in 1970 to 2.893 million in 1995, whereas Naples saw its population rise from 2.562 million in 1970 to 2.963 million in 1995. Genoa had a million people in 1970, but has since lost population (852 000 in 1995, -0.1% a year), as have the Venice-Mestre conurbation (451 000 in 1995, -0.3%) and Trieste (224 000, -0.8%). The highest growth rates have been achieved in Catania (645 000, 0.7%), Salerno (536 000, 0.6%), Cagliari (305 000, 0.6%) and Caserta (269 000, 1.0%). The populations of smaller urban areas (under 200 000 people in 1995) grew at approximately 0.5% a year between 1970 and 1995.

Notwithstanding its relatively dynamic growth, however, the Italian coastal urban population is projected to decline over the next 25 years, falling from 25.339 million in 2000 to 24.543 million in 2025, i.e., a loss of 856 000 people at a mean annual rate of -0.14% (against -0.31% in inland urban areas). The urbanization rate of the Mediterranean regions is projected to increase from 77.3 to 81.0% over the same period.

Figure 26. Rural and urban population of the Mediterranean coastal regions 1970-2000-2025 (in thousands)

