

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Poland

**Post:** Warsaw

### **Fish and Seafood Market in Poland.**

**Report Categories:**

Fishery Products

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**Report Highlights:**

In 2014 the total fish catch was 170,500 MT, which included the Baltic Sea and long-distance fisheries. The Polish fish processing industry is one of the largest in Europe. There are 250 processing plants eligible for export to the European Union and several hundred small, often family run companies which are permitted to sell products only to regional markets. The average annual fish consumption in Poland is almost 50 percent of the average per capita fish consumption in the EU. Poland imports mainly raw fish which is used by the local industry for further processing.

## Production

### Fishing sector

In 2014 the total fish catch of was 170,500 MT, which included the Baltic Sea and long-distance fisheries. Fish catch in 2014 was 13 percent lower than in 2013. Total amount of Baltic Sea catch in 2014 was 118,500 MT, a 12 percent decrease compared to 2013. The main species caught were European sprat (58,600 MT), Atlantic herring (28,100 MT) and Atlantic cod (13,000 MT). The total amount of catch in the long-distance fisheries amounted to 52,100 MT, a 15 percent decrease compared to 2013. The main deep sea activity areas were on South Eastern Atlantic and North Eastern Atlantic fishing grounds.

### Processing

The Polish fish processing industry is one of the largest in Europe. It supplies European countries with processed fish products such as smoked fish (salmon and trout), canned fish (herring, mackerel and sprat) and ready-to-eat fish products (salads and fish in marinades). Other products include fresh and frozen cod fillets, ready-to-prepare frozen fish fillets (breaded fillets), freshwater and diadromous fish (pike-perch), and fresh and frozen whole fish (trout, sprat). In 2014 the overall output of the Polish fish processing industry amounted to 456,000 MT, worth PLN 8.5 billion (U.S.\$ 2.3 billion). There are 250 processing plants eligible for export to the European Union and several hundred small, often family run companies, permitted to sell products only to regional markets - these are e.g. small processing plants next to fisheries. In 2014 the industry employed approximately 12,000 people.

### Output of Fish Processing Industry (000MT)

	2010	2011	2012	2013	2014
Production of fish	369.6	374.9	423.2	466.2	456.0
• Fresh and frozen fish	28.9	22.2	60.0	83.3	63.0
• Fresh and frozen fillets	42.4	45.9	46.9	52.2	56.5
• Salted fish	20.6	19.4	19.7	19.6	19.0
• Smoked fish	83.0	80.5	85.1	89.9	89.0
Processed or tinned fish	176.5	194.4	199.3	208.9	215.0
• Tinned fish and preserves	68.1	74.2	67.3	68.8	68.0
• Pickles	82.8	84.0	87.1	87.1	90.0
• Culinary and delicatessen products	25.6	36.2	44.9	53.0	57.0
Processed fish by species					n/a
• Salmon	2.4	4.6	8.7	14.1	
• Herring	97.6	104.6	106.0	105.5	
• Sardines and sprats	11.8	12.2	12.6	13.6	
• Mackerel	11.7	11.8	9.8	9.6	
• Tuna	0.9	1.0	0.5	0.1	

Source: Institute of Rural Economics, Fish Market, 2014

## Aquaculture sector

Aquaculture production is situated in land-based freshwater farms and is carried out in traditional earth ponds in 2 or 3-year cycles. In 2014 total national aquaculture production reached 38,000 MT, an 8 percent increase compared to 2013. The biggest category is carp production which in 2014 amounted to 19,000 MT and made up over 50 percent of total aquaculture output in 2014. Carp farming is carried out in earth ponds on traditional land-based farms. The total registered area of carp farms in the country is about 70,000 hectares, the largest in Europe. The output of rainbow trout in 2014 was 15,000 MT in 2014. The development of trout farming in Poland started at the end of 1990s, and production has been stagnating over the past few years. Trout production is carried out in intensive fish production facilities and trout is harvested when it reaches the size of about 200-450g. Trout farms are located in the North, on the Baltic Sea coast, and in the south, in the Carpathian foothills.

Recently, Poland has started developing more intensive land-based aquaculture and several investors have launched new businesses in the field of controlled breeding of marine or freshwater fish in indoor RAS technology (trout, sturgeon, salmon, tilapia, and barramundi). The newly established European Fisheries Fund (EFF) for projects in Poland allocated an amount of Euro 734 million in the period until 2020. This fund launches new financial instruments for projects within aquaculture.

## Consumption

In 2014 the average annual fish consumption in Poland was 12.3 kg/per capita, almost 50 percent of the average per capita fish consumption in the EU. In 2014 consumption of fish was 1.1 percent higher than in 2013 mainly due to higher consumption of imported fish (pollock, salmon and cod). Pollock, herring, and mackerel are the most popular saltwater species, while carp, trout and panga are the most popular freshwater species. Since 2007 panga consumption has significantly declined due to perceived inferiority and health concerns. In the same time period pollock, salmon, cod, and trout have gained traction in the market, indicating a structural change in consumption. Consumption of pollock, the number one fish consumed in Poland, is growing due to relatively low prices compared to other fish and because of improved quality stemming from increased imports from the United States. There is a growing awareness among Polish consumers regarding fish and seafood consumption. They are choosing fish products with more care and attention, are getting information about products, and are benefiting from campaigns promoting consumption and the health benefits of fish and seafood.

## Distribution

Seafood is sold in stores ranging from specialized stores, supermarkets, hypermarkets, and small independent grocers. The greatest variety of processed fish products is found in specialized stores, supermarkets, and hypermarkets, the latter two of which dedicate the most shelf space and selection of processed seafood products much broader than that of most U.S. stores. Many hypermarkets also feature extensive displays for fresh seafood products including live fish (in tanks) for purchase. Small independent grocers typically lack fresh options but instead offer processed, brand labeled options or frozen filets frequently with no brand association. Carp is the most traditional national species. It is served during the Christmas period in Poland, when the market supply of carp is at the highest level.

**Annual Consumption of Fish in Poland  
(kilograms of life weight/capita)**

	2012	2013	2014
<b>Total Fish and Seafood</b>	<b>11.7</b>	<b>12.2</b>	<b>12.3</b>
• Pollock	2.6	2.7	2.9
• Herrings	2.2	2.0	1.9
• Mackerel	0.7	0.9	0.8
• Cod	0.8	0.8	1.0
• Panga	0.9	0.8	0.7
• Sprat	0.8	0.7	0.6
• Salmon	0.9	0.7	0.9
• Carp	0.5	0.5	0.5
• Tuna	0.4	0.5	0.4
• Hake	0.4	0.4	0.4
• Other	1.5	2.2	2.2

Source: Institute of Rural Economics.

## Trade

### Imports

Poland imports mainly raw fish which is used by the local industry for further processing. Import of salmon depends mainly on the possibility of exporting processed products. However, in 2014, lower prices stimulated domestic consumption of salmon and resulted in increased imports. Import of herrings is also decreasing due to the decline in domestic consumption. Imports of pollock are growing due to higher demand for the product from the United States because consumers perceive it as having higher quality compared to pollock imported from China. Decreased domestic catch and growing demand for cod stimulate imports. Cod is imported mainly as a fresh fish from Denmark or frozen from Norway and Russia. Imports of mackerel in 2014 decreased due to higher prices and stocks built in 2013 because of high level of imports.

### Value of Imports of Fish and Seafood Products to Poland (U.S.\$ 000)

	2012	2013	2014	I- V 2015	I-V 2015/2014 (%)
	13,660	15,118	13,537	5,365	78
Live fish	609,287	878,880	937,389	319,163	-20
Fish, fresh or chilled excl. fillets	188,016	217,942	241,365	79,394	-28
Fish, frozen, excl. fillets	539,083	598,038	653,061	220,250	-13
Fish, fillets	13,875	18,233	19,782	5,817	-22
Fish, dried, salted, smoked or in	28,525	31,688	46,363	15,815	-20

brine					
Crustaceans, live, fresh, chilled, frozen, dried	4,008	4,856	5,732	3,457	41
Molluscs, live, fresh, chilled, frozen, dried	113	140	187	1,922	2,752
<b>Total</b>	<b>1,396,567</b>	<b>1,764,895</b>	<b>1,917,416</b>	<b>651,183</b>	<b>-22</b>

Source: Global Trade Atlas

In 2014 Poland imported 454,355MT of fish and seafood for a value of U.S.\$ 1.9 billion. Compared to 2013, there was a 5 percent increase in volume and a 9 percent increase in value. Norway was the main supplier of fish as raw materials to Poland, while other significant partners include Denmark, China, United States, Germany, Denmark, the Netherlands and other countries. Poland is one of the biggest salmon importers in the world supplied mostly by Norway, Sweden and United States. In 2014 Poland imported mostly salmon, mackerel, cod and haddock from Norway, cod from Denmark and Russia, and mackerel from the Netherlands. Although during the first five months of 2015 the volume of imports were at the same level as in the comparable period of 2014, the value of imports dropped by 22 percent because of reduced import prices.

#### Volume of Imports of Fish and Seafood Products to Poland (MT)

	2012	2013	2014	I-V 2015	I-V 2015/2014 (%)
Live fish	4,349	4,245	3,622	1,146	123
Fish, fresh or chilled excl. fillets	139,873	139,014	159,963	69,873	7
Fish, frozen, excl. fillets	75,644	94,747	94,612	39,289	-5
Fish, fillets	175,372	186,909	185,091	66,560	-4
Fish, dried, salted, smoked or in brine	1,358	1,774	3,127	1,113	-1
Crustaceans, live, fresh, chilled, frozen, dried	5,850	5,890	6,705	2,442	-13
Molluscs, live, fresh, chilled, frozen, dried	815	1,044	1,225	772	56
Aquatic invertebrates other than crustaceans and molluscs	5	5	10	377	2,752
<b>Total</b>	<b>403,266</b>	<b>433,628</b>	<b>454,355</b>	<b>181,572</b>	<b>0</b>

Source: Global Trade Atlas

After a one percent decline in 2014, imports of fish and seafood products from the United States in 2015 are expected to remain at the previous year's level because reduced imports of salmon are expected to be offset by higher purchases of Alaska Pollock.

### Imports of Fish and Seafood Products from the United States

HS code	Commodity	000 U.S.\$				
		2012	2013	2014	I-V 2015	2015 est.
	Total Fish & Seafood Products	37,512	49,290	48,818	17,554	<b>49,000</b>
030475	Alaska Pollock Fillets, Frozen	12,554	15,532	22,175	12,080	27,300
030481	Pacific, Atlantic And Danube Salmon Fillets Frozen	830	15,857	16,645	2,183	13,000
030494	Alaska Pollock, Frozen, Except Fillets	4,008	6,141	5,483	2,630	6,800
030311	Sockeye Salmon, excl. Fillet, Livers & Roes, Frozen	16,711	8,863	1,850	0	0
030313	Atlantic Salmon And Danube Salmon, Frozen	0	1,531	1,245	0	0
030474	Hake Fillets, Frozen	386	109	492	0	0
030495	Fish of Families Bregmacerotidae etc., Frozen	2,088	727	380	414	780
030729	Scallops ncl Queen, Frozen/Dried/Salted/In Brine	28	100	153	0	0
160411	Salmon, Prepared Or Preserved, Whole Or Pieces	79	93	88	1	3
030489	Fish Fillets, Frozen	60	52	84	0	0
030351	Herrings, Frozen, Except Fillets, Livers And Roes	35	0	72	0	0
030354	Mackerel, Frozen	0	0	36	0	0
030622	Lobsters, Live, Fresh, Ch., Dried, Salted or In Brine	103	41	28	0	0
030319	Pacific Salmon, excl. Filet, Liver, Roe, Frozen.	43	25	22	15	16
	Other	587	220	65	231	101

Source: Global Trade Atlas

### Exports

In 2014 Polish exported of fish and seafood products for U.S.\$ 1.4 billion, an 11 percent increase in comparison to the previous year. Major destinations of Polish exports of fish are Germany (smoked salmon, cod, shrimp, clams), France (smoked salmon, snails), Denmark (sardines, sprats), Romania (herrings), Sweden, Belarus and Austria.

### Value of Exports of Fish and Seafood Products to Poland (U.S.\$ 000)

	2012	2013	2014	I-V 2015	I-V 2015/2014 (%)
Live fish	4,287	4,065	3,178	997	-22
Fish, fresh or chilled excl. fillets	18,090	26,126	30,794	9,135	-6
Fish, frozen, excl. fillets	25,365	40,074	31,979	11,213	-5
Fish, fillets	372,634	416,606	488,459	182,260	-13
Fish, dried, salted, smoked or in brine	571,777	776,843	850,393	282,775	-17
Crustaceans, live, fresh, chilled, frozen, dried	2,499	3,751	3,675	927	-34
Molluscs, live, fresh, chilled, frozen, dried	2,769	2,754	4,048	808	0
Aquatic invertebrates other than crustaceans and molluscs	1,155	1,646	378	672	107
<b>Total</b>	998,576	1,271,865	1,412,904	488,787	

Source: Global Trade Atlas

In 2014 Polish exports of fish and seafood products to the United States amounted to U.S.\$ 35 million, 27 percent drop in comparison to 2013. The decrease of exports to the United States stemmed from reduced sales of herrings and sardines. In the first five months of 2015 exports to the U.S. decreased by another 18 percent because lower sales of herrings and sardines were not offset by higher sales of smoked salmon.

#### Volume of Exports of Fish and Seafood Products to Poland (MT)

	2012	2013	2014	I-V 2015	I-V 2015/2014 (%)
Live fish	893	803	677	239	-10
Fish, fresh or chilled excl. fillets	27,172	21,312	15,633	5,854	-44
Fish, frozen, excl. fillets	22,647	33,960	24,199	14,868	107
Fish, fillets	58,111	62,784	66,709	29,960	5
Fish, dried, salted, smoked or in brine	45,779	52,573	53,221	21,713	6
Crustaceans, live, fresh, chilled, frozen, dried	727	707	776	176	-40
Molluscs, live, fresh, chilled, frozen, dried	607	579	660	173	8
Aquatic invertebrates other than crustaceans and molluscs	367	496	116	180	90
<b>Total</b>	156,303	173,214	161,991	73,163	8

Source: Global Trade Atlas

#### Current Tariff for Seafood Products

Tariffs for seafood products exported to the EU range from zero to 22 percent depending on species,

level of processing, and the time of year. Detailed information on seafood tariffs can be found in the official [EU Journal](#) in pages 47-69 and 134-139.

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2012:304:0001:0915:EN:PDF>

### **Market Access**

A health certificate issued by a government-approved veterinarian from the exporting country must accompany all fish shipments to Poland. Products packed for retail sale also must bear a label in the Polish language with the date of production clearly stated. Exporters should also check with Polish importers regarding standards.

For guidelines regarding seafood exports to Poland and the EU in general, information is available from the National Oceanic and Atmospheric Association, [NOAA](#).

<http://www.seafood.nmfs.noaa.gov/Howtoexportseafood2013.pdf>

### **Market Entry Strategy**

Trade missions coordinated through industry/export organizations as well as participation in trade shows such as the annual European Seafood Exposition in Brussels are important in gaining knowledge about the market structure, consumer preferences and building contacts with importers. Poland has its own tradeshow, POLFISH, held biannually in Gdansk on the Baltic Sea in Northern Poland. Next POLFISH trade show is scheduled for 2017.

U.S. exporters of seafood products may also obtain a list of current importers by contacting the Office of Agricultural Affairs of the U.S. Embassy in Warsaw.

### **Trade Shows and Contact**

#### **European Seafood Exposition, Brussels, Belgium**

April 26-28, 2016

<http://www.polfishfair.pl>

#### **POLFISH Trade Show, Gdansk, Poland**

June 7-9, 2017

<http://www.eventseye.com/fairs/f-polfish-14935-1.html>

For more information concerning market entry and a current importer list contact:

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