



## POLAND IN THE WORLD AND IN THE EU

(2015, source: FAO and Eurostat)

Poland is the EU's 10th largest producer of fisheries and 9th largest of aquaculture products.

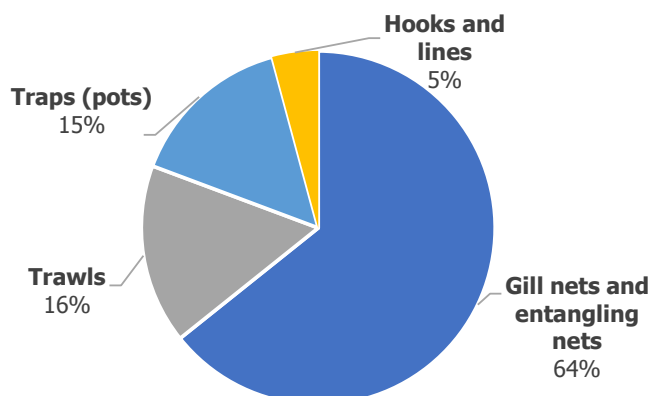
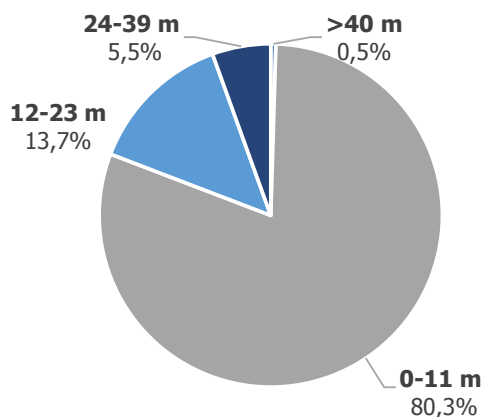
| (1.000 tonnes) | World   | EU-28 | Poland | % World | % EU-28 |
|----------------|---------|-------|--------|---------|---------|
| Catches        | 104.635 | 5.144 | 187    | 0,2%    | 3,6%    |
| Aquaculture    | 106.094 | 1.307 | 34     | 0,0%    | 2,6%    |
| Total          | 211.511 | 6.451 | 221    | 0,1%    | 3,4%    |

## FISHING FLEET

(fleet - 2017, source: EU fishing fleet register; employment - 2015 source: [JRC](#))

| Vessels<br>(2017)       | Capacity<br>(2017) | Power<br>(2017)   |                |
|-------------------------|--------------------|-------------------|----------------|
| Number: <b>834</b>      | GT: <b>27.559</b>  | KW: <b>76.287</b> |                |
| TOTAL FTE: <b>3.210</b> |                    |                   |                |
| 0-11 m                  | 12-23 m            | 24-39 m           | >40 m          |
| Jobs (FTE): 44%         | Jobs (FTE): 34%    | Jobs (FTE): 17%   | Jobs (FTE): 5% |

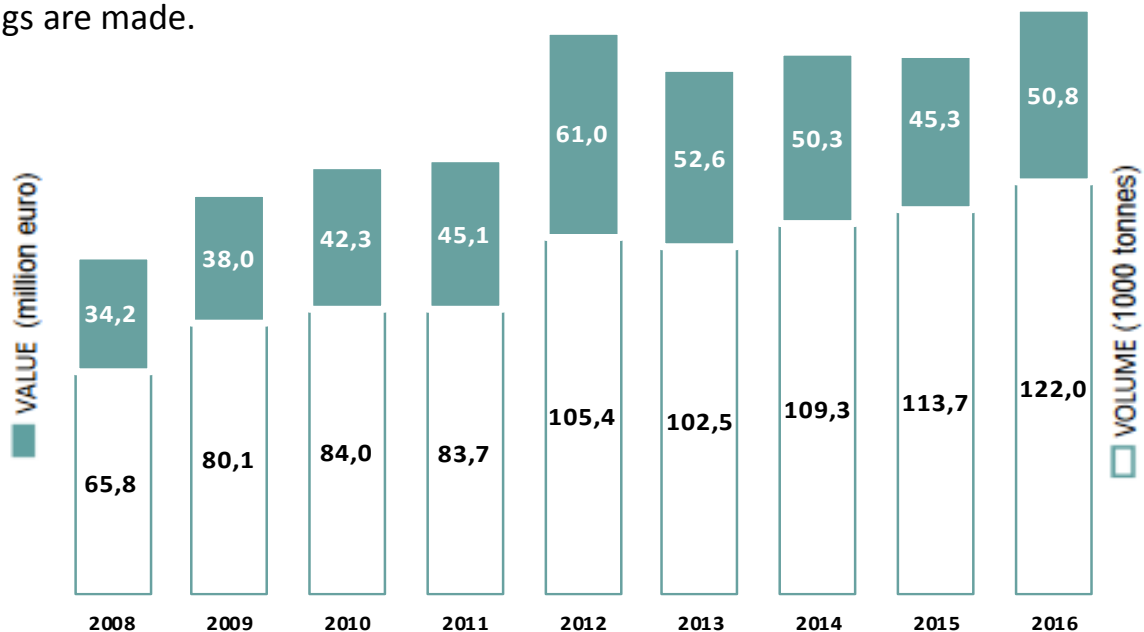
The Polish **fishing fleet** and **gear composition**:





## LANDINGS

Landings represent the initial unloading of any quantity of fisheries products, including aquatic plants, from on board a fishing vessel to land in a given country, regardless of the nationality of the vessel making the landings. Landings are recorded in net weight. In Poland, 100% of the volumes are landed as fresh, whole, filleted or gutted, and 99,9% for human consumption. 90% of fisheries products are landed by Polish vessels. There are 71 fishing ports recorded in Poland (source: EU Master Data Register). The three main fishing ports are Władysławowo, Kołobrzeg and Hel, where 75% of all landings are made.



Main commercial species landed and % of total  
(2016, million euro and 1.000 tonnes)



|                       |    |     |    |     |                       |
|-----------------------|----|-----|----|-----|-----------------------|
| COD                   | 16 | 32% | 47 | 39% | SPRAT                 |
| HERRING               | 12 | 24% | 38 | 31% | HERRING               |
| SPRAT                 | 10 | 19% | 15 | 12% | EUROPEAN FLOUNDER     |
| EUROPEAN FLOUNDER     | 5  | 9%  | 13 | 11% | COD                   |
| OTHER FRESHWATER FISH | 2  | 5%  | 5  | 4%  | OTHER GROUND FISH     |
| TROUT                 | 1  | 3%  | 3  | 2%  | OTHER FRESHWATER FISH |
| OTHERS                | 4  | 8%  | 1  | 1%  | OTHERS                |

(source: Eurostat)

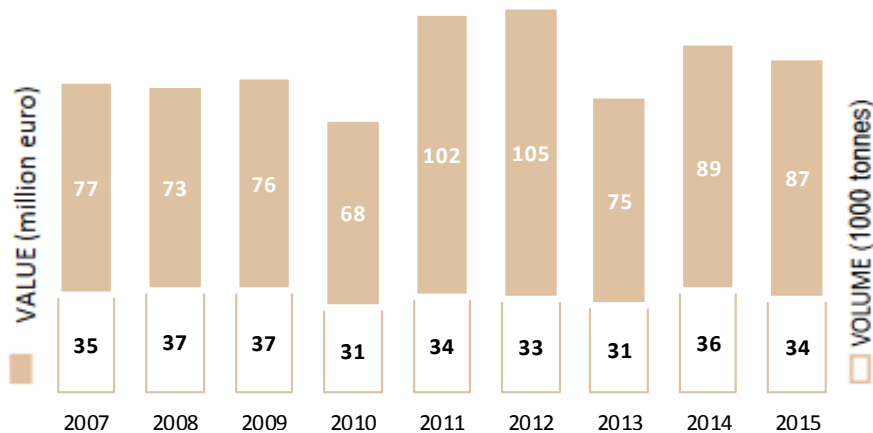


## AQUACULTURE

Aquaculture refers to the farming of aquatic (freshwater or saltwater) organisms, such as fish, molluscs, crustaceans and aquatic plants. Aquaculture data are reported in live weight equivalent and value. Farmed products are generally not sold at auction markets, but directly from producers to wholesalers or retailers.

In Poland, 100% of fish is farmed in freshwater. The aquaculture methods are:

- 53% in ponds;
- 39% in tanks and raceways;
- 5% in recirculation systems;
- 3% other.



Main commercial species farmed and % of total  
(2015, million euro and 1.000 tonnes)



|                       |      |       |      |       |                       |
|-----------------------|------|-------|------|-------|-----------------------|
| TROUT                 | 38,1 | 43,9% | 17,1 | 51,1% | CARP                  |
| CARP                  | 37,6 | 43,5% | 13,3 | 39,6% | TROUT                 |
| OTHER SALMONIDS       | 3,8  | 4,4%  | 1,2  | 3,7%  | OTHER SALMONIDS       |
| OTHER FRESHWATER FISH | 2,5  | 2,8%  | 0,7  | 2,2%  | OTHER FRESHWATER FISH |
| TILAPIA               | 2,3  | 2,6%  | 0,5  | 1,5%  | TILAPIA               |
| OTHERS                | 2,4  | 2,8%  | 0,6  | 1,9%  | OTHERS                |

(source: Eurostat)



## PRODUCER ORGANISATIONS (2018, source: DG MARE, [link](#))

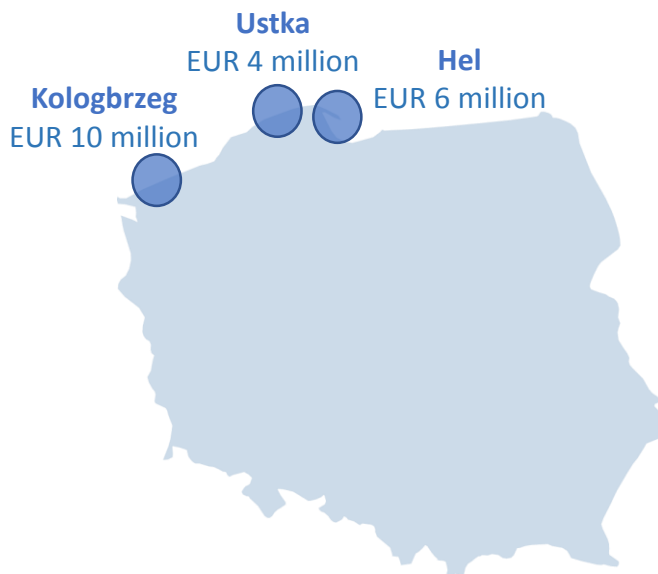
**11 producer organisations (POs)** are formally recognised. Their role is to contribute to the achievement of the objectives of the CFP and of the CMO through the collective management of their members' activities.

2 POs operate in the aquaculture sector and 9 are involved in fisheries.

## FIRST SALES (2017, source: EUMOFA)

**First sales** concern the fish that is sold or registered at an auction center or to registered buyers or to producer organisations (PO). First sales may differ from landings since the former do not cover fish that is landed by vessels owned by processing companies, or direct sales to processors.

The majority of the marine catch in Poland is sold to registered buyers.



The top-3 places of sale covered 78% of total volume and 69% of total value.

| Top-3 places of sales | Volume (tonnes) | Value (million EUR) | Top main commercial species (in value) |
|-----------------------|-----------------|---------------------|--|
| Kologbrzeg            | 29.182          | 9,7                 | Herring, sprat, European flounder      |
| Hel                   | 28.373          | 6,0                 | Sprat, herring, trout                  |
| Ustka                 | 8.836           | 4,0                 | Herring, sprat, cod                    |



## WHOLESALE (source: Eurofish)

**Wholesale** is an intermediary stage in the distribution channel that buys in bulk and sells to resellers (e.g. retailers) rather than to consumers.

In Poland, there are wholesalers and 1 wholesale market (Metro).

### 1 wholesale market "Metro"

## PROCESSING

In 2015, 17.295 persons were employed in Poland in the fish processing industry.

In Poland, the fish processing industry recorded a value added of EUR 374,5 million, constituting 4% of the value added of total manufacture of food products.

The main products were fresh, frozen, smoked, dried fillets of freshwater fish, smoked herring and salmon, prepared or preserved salmon, herring, mackerel, sardine, sardinella, brisling and sprat.

**301 companies**  
**Sales: EUR 2,3 billion**  
(2015, source Eurostat - SBS)



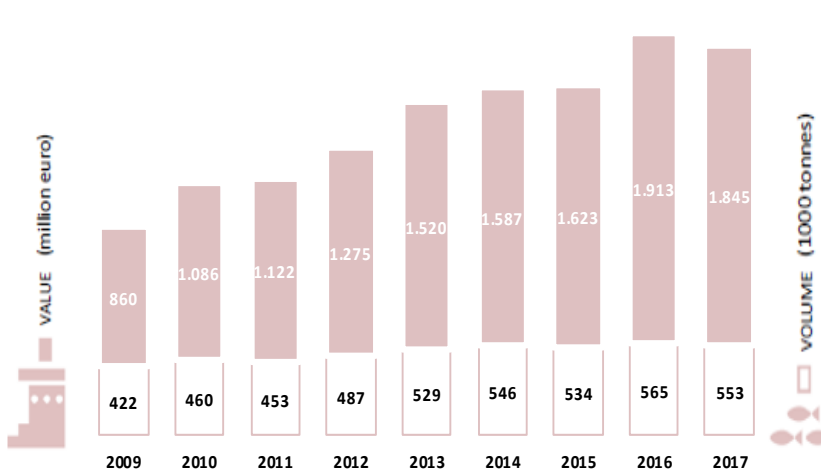
**Poland**

updated on 03-05-18



# TRADE (source: Eurostat)

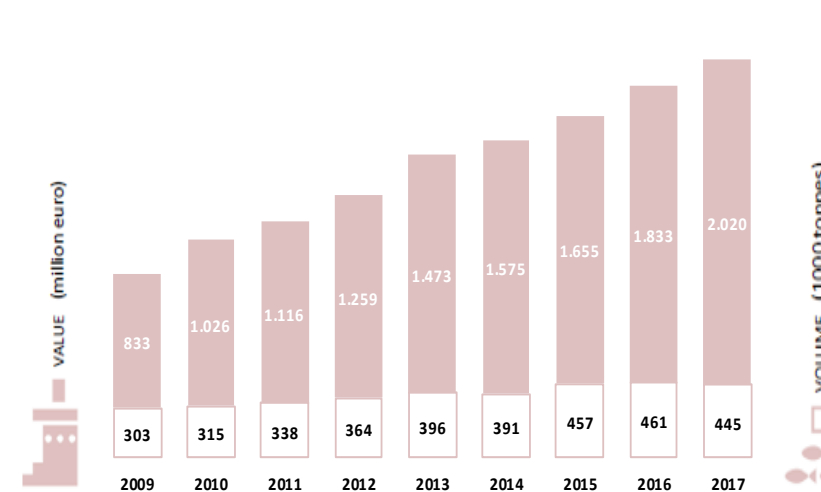
## Import



MAIN COMMERCIAL SPECIES IMPORTED AND % OF TOTAL IMPORTS (2017, million euro)

| Species        | Value (million euro) | % of Total Imports |
|----------------|----------------------|--------------------|
| SALMON         | 821                  | 45%                |
| COD            | 185                  | 10%                |
| HERRING        | 155                  | 8%                 |
| ALASKA POLLOCK | 79                   | 4%                 |
| MACKEREL       | 66                   | 4%                 |
| TROUT          | 58                   | 3%                 |
| OTHERS         | 480                  | 26%                |

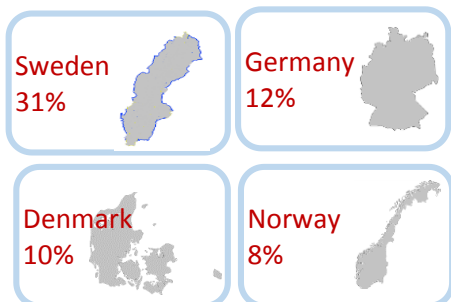
## Export



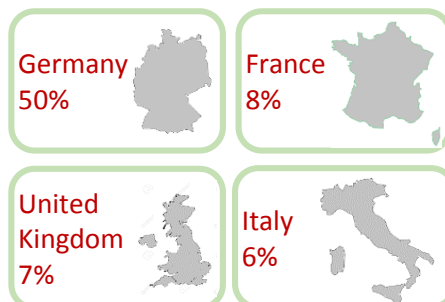
MAIN COMMERCIAL SPECIES EXPORTED AND % OF TOTAL EXPORTS (2017, million euro)

| Species           | Value (million euro) | % of Total Exports |
|-------------------|----------------------|--------------------|
| SALMON            | 991                  | 49%                |
| OTHER MARINE FISH | 164                  | 8%                 |
| HERRING           | 148                  | 7%                 |
| OTHER PRODUCTS    | 135                  | 7%                 |
| COD               | 132                  | 7%                 |
| OTHER SALMONIDS   | 106                  | 5%                 |
| OTHERS            | 344                  | 17%                |

Main countries of **ORIGIN**  
(in value, 2017)



Main countries of **DESTINATION**  
(in value, 2017)

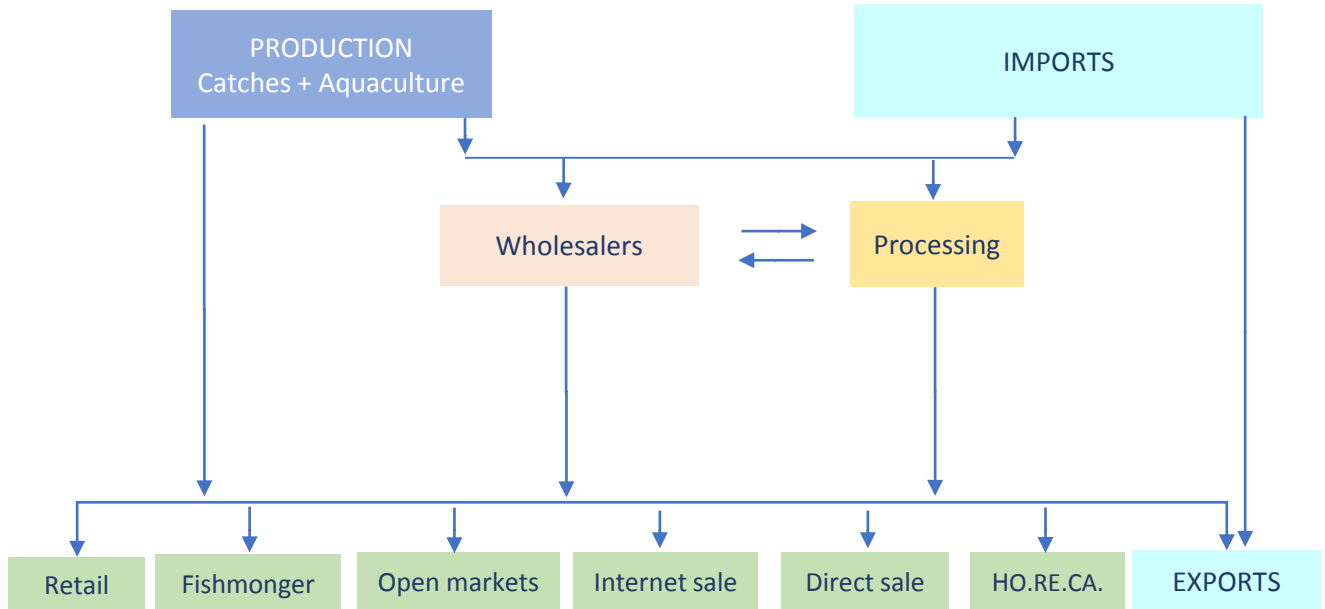




# DISTRIBUTION

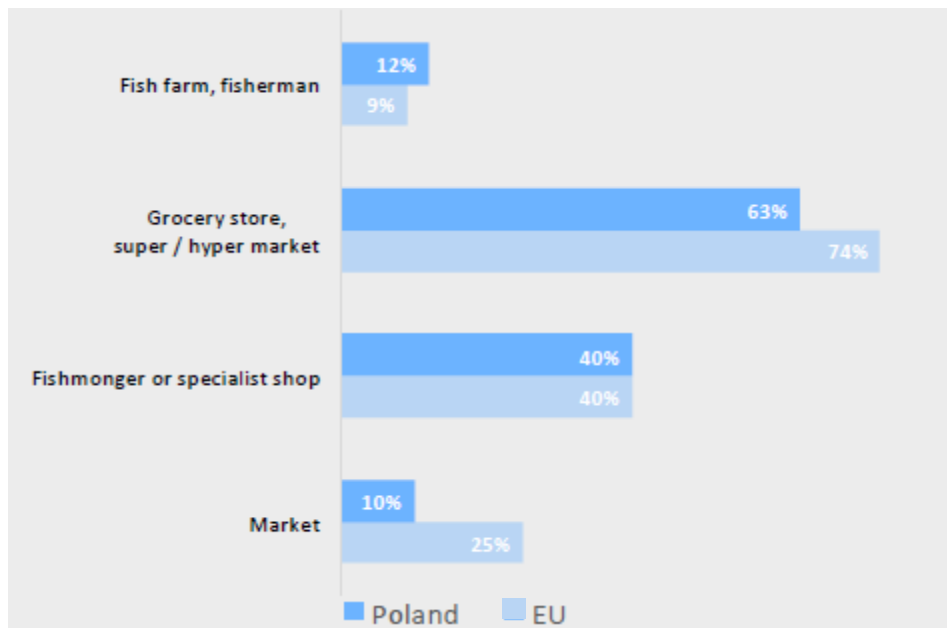
## The supply chain of fisheries and aquaculture products in Poland

(source: EUROFISH)



## Consumer preferences on purchasing channels

(source: EUROBAROMETER)



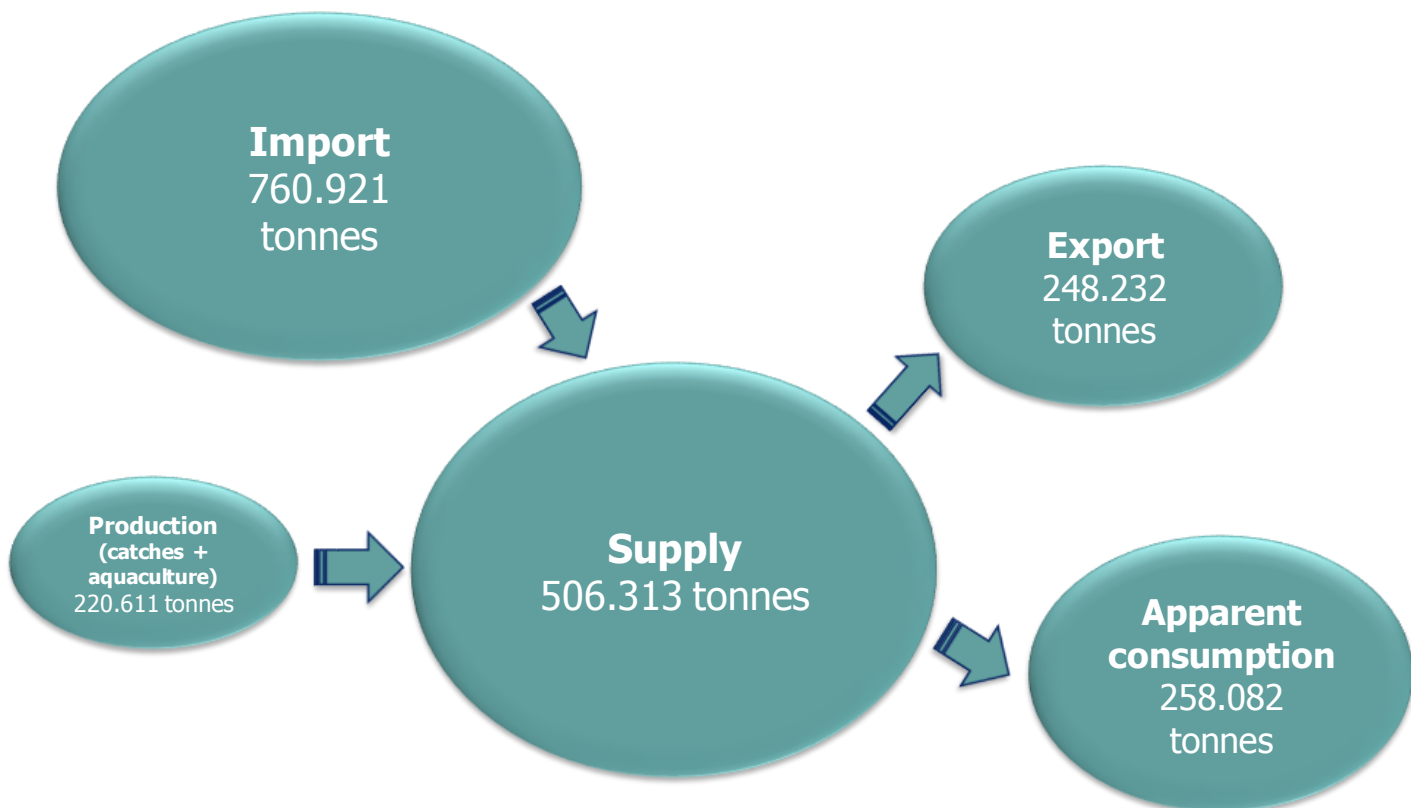


**Poland**

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## SUPPLY BALANCE (2015, source: EUMOFA)







# CONSUMPTION

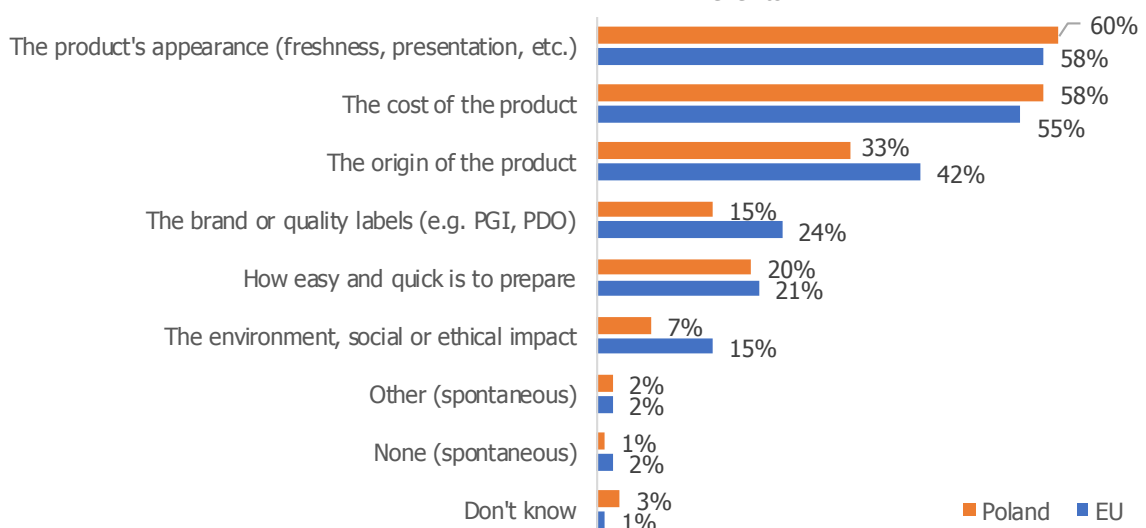
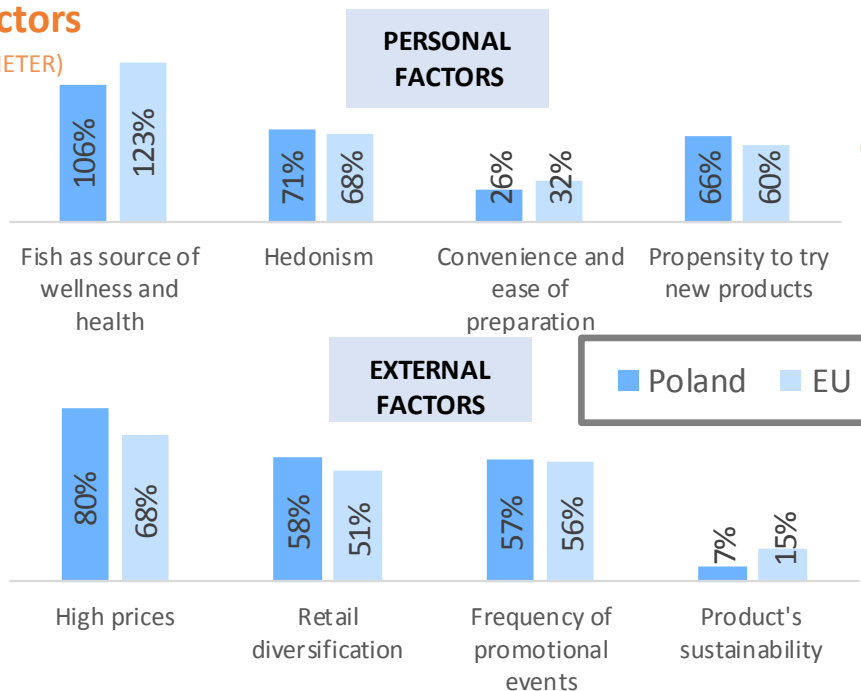
Apparent consumption of fisheries and aquaculture products in Poland amounted to **13,6 kg per capita in 2015**, a minor decrease (-1%) compared to the previous year. The main consumed species were **herring, tuna, mackerel, salmon, carp, and trout**.

From a socio-demographic point of view, regular fish consumers belong mainly to age classes 40-54 years, and over 55 years. Young people are less inclined to consume fish in Poland. This age group has the lowest number of regular consumers across the EU (source: "EU consumer habits regarding fishery and aquaculture products"). Poles consume especially frozen and fresh products, while loose fish (74%) is more frequently consumed than the EU average (68%).

## Purchasing factors

(source: EUROBAROMETER)

**13,6 kg per capita**  
(source: EUMOFA)





## LANDINGS

Volumes and values are collected by EUMOFA from **Eurostat – Fishery**. Data concern all species landed in Poland by vessels of all nationalities.

Data are available on a yearly basis, accessible through simple and advanced tables.

## FIRST SALES

Volumes and values are collected from Ministry of Maritime Economy and Inland Waterways on a weekly and monthly basis. Data include all sales occurred through auctions and do not include other sales occurred out of auctions (e.g. direct sales).

**Weekly data** are collected and disseminated for 9 species and 9 places of sale. Click [here](#) for the list of species and places of sale.

**Monthly data** are collected and disseminated for all species sold in the places of sales included in the data transmission (click [here](#) for the list).

Both types of data are accessible through simple and advanced tables.

## TRADE

Volumes and values are collected from **Eurostat – COMEXT**. Data concern trade of all fisheries and aquaculture products as recorded by national customs, available on a monthly and yearly basis.

Data are accessible through simple and advanced tables.

## AQUACULTURE

Volumes and values are collected by EUMOFA from **Eurostat – Fishery**. Data are available on a yearly basis, accessible through simple and advanced tables.

## WHOLESALE

No data available for this supply chain stage

## PROCESSING

Volumes and values are collected from **Eurostat – PRODCOM**. Data concern 25 processed products as recorded through the PRODCOM nomenclature.

Data are available on a yearly basis and are accessible through simple tables.

## CONSUMPTION

Household consumption of fresh fisheries and aquaculture products is collected from a **private provider** by EUMOFA on a monthly basis for 4 products based on panel reporting. Click [here](#) for the products per each Member State.

Data (volumes and values) are accessible through simple queries on a monthly and yearly basis.