



## 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.

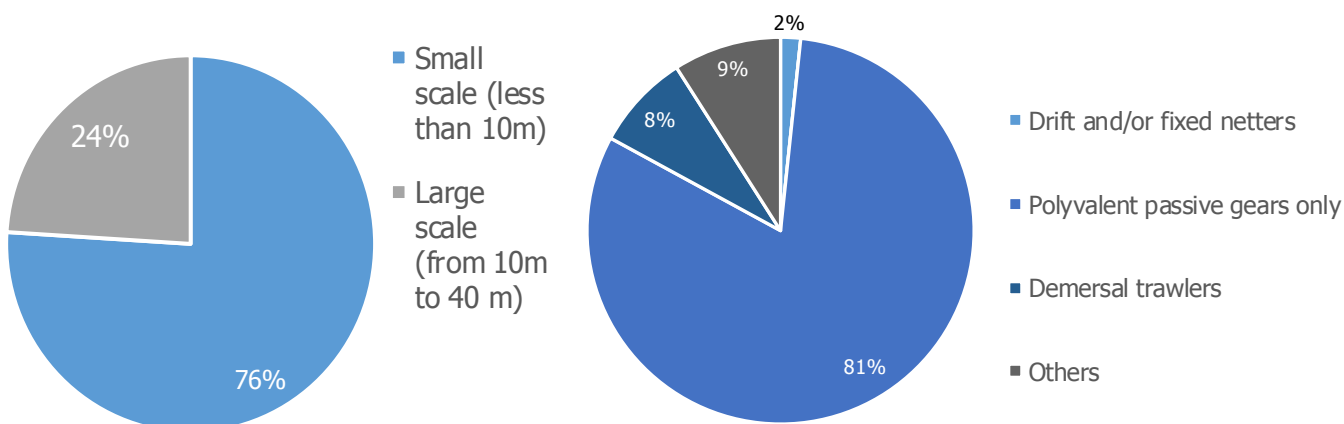
(1.000 tonnes)	World	EU-28	Poland	% World	% EU-28
Catches	104.635	5.144	187	0,2%	3,6%
Aquaculture	106.094	1.307	34	0,0%	2,6%
Total	211.511	6.451	221	0,1%	3,4%

## FISHING FLEET

(2015, source: [JRC and Annual Economic Report](#))

Vessels	Capacity	Power
Number: <b>873</b>	GT: <b>34</b>	KW: <b>81.5</b>
<b>Small scale</b>	<b>Large scale</b>	<b>Distant fleet</b>
Jobs (FTE): <b>57%</b>	Jobs (FTE): <b>36%</b>	Jobs (FTE): <b>7%</b>
<b>TOTAL FTE: 2.491</b>		

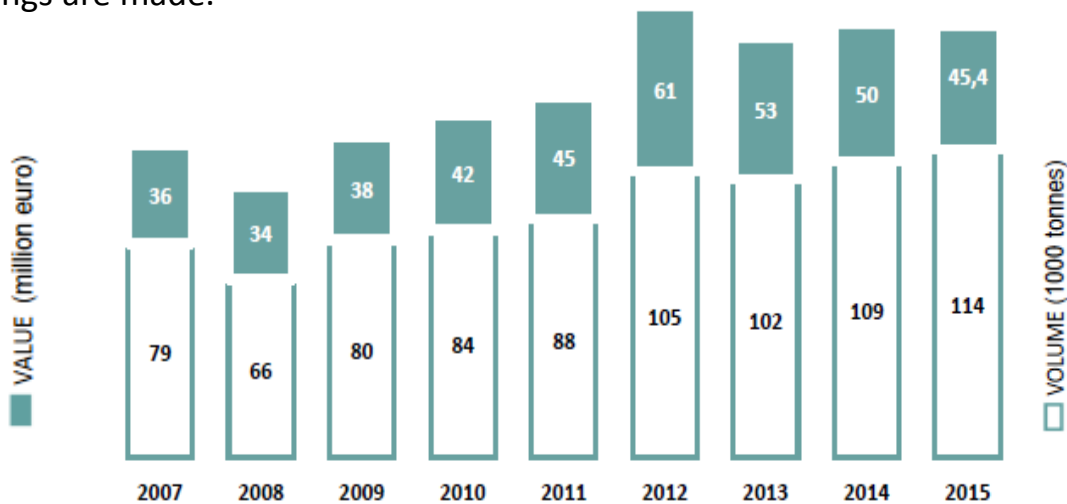
The Polish **fishing fleet** and **gear composition**:





# 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, or gutted, and 99,9% for human consumption. 90% of fisheries products are landed by Polish vessels. Total fishing ports reported in 2016 are 71, of which 40 are covered by EUMOFA. The three main fishing ports are Władysławowo, Kołobrzeg and Hel, where 75% of all landings are made.



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



COD	18,4	41%	44	39%	SPRAT
HERRING	9,8	22%	34	30%	HERRING
SPRAT	7,2	16%	16	15%	COD
EUROPEAN FLOUNDER	3,7	8%	10	10%	EUROPEAN FLOUNDER
OTHER FRESHWATER FISH	2,1	5%	4	3%	OTHER MARINE FISH
TROUT	1	2%	2,6	2%	OTHER FRESHWATER FISH
PIKE-PERCH	1	2%	0,2	0%	PIKE-PERCH

(source: Eurostat)

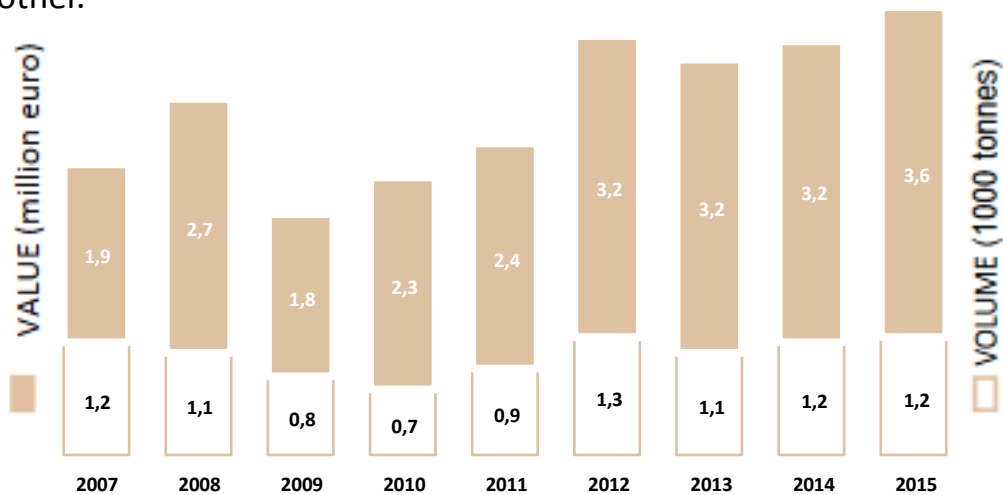


## AQUACULTURE

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:

- 54% in ponds;
- 38% 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	41	45%	17	50%	CARP
CARP	38	42%	14	41%	TROUT
OTHER SALMONIDS	4	4%	1,2	4%	OTHER SALMONIDS
OTHER FRESHWATER FISH	3	3%	0,8	2%	OTHER FRESHWATER FISH
TILAPIA	2	3%	0,5	1%	TILAPIA
OTHERS	2	3%	0,6	2%	OTHERS

(source: Eurostat)



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## PRODUCER ORGANISATIONS (2016, source: DG MARE, [link](#))

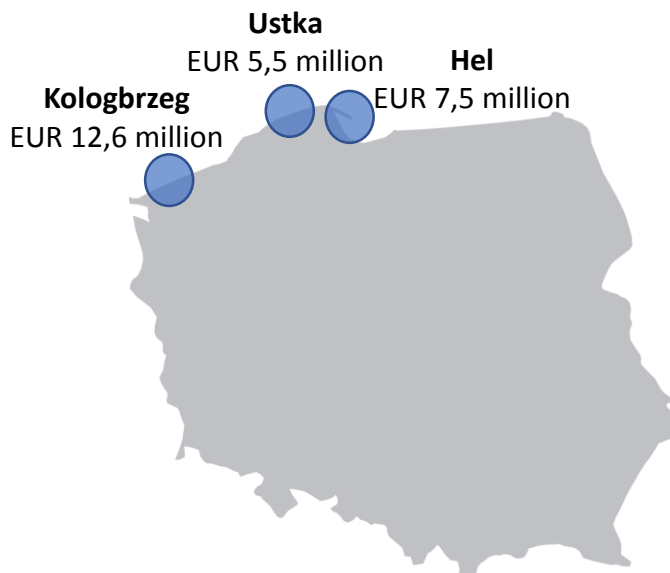
Ten **producer organisations (POs)** are recognised for the management of fisheries and aquaculture activities of their associated members.

Most of the organisations are operating in the **fisheries sector** such as Zrzeszenie Rybaków Morskich, whereas very few organisation represent **aquaculture sector** (Organizacja Producentów Ryb Jesiotrowatych).

## FIRST SALES (2016, source: EUMOFA)

**First sale** concerns the fish that is sold or registered at an auction center or to registered buyers or to producer organizations (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 is sold to a registered buyer.



There were 40 places of first sales operating in 2016 in the Baltic Sea. Top three first-sales ports are **Kologbrzeg, Hel and Ustka.**

The top-3 auctions provide 82% of total volume and 71% of total value

Top 3 places of sale	Volume (tonnes)	Value (million EUR)	Top main commercial species (value)
Kologbrzeg	39.092	12,6	Herring, sprat, European flounder, cod.
Hel	33.028	7,5	Sprat, herring, trout, cod.
Ustka	11.819	5,5	Cod, herring, sprat, trout.



## 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 (source: EUROSTAT-SBS)

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, covering 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, herrings, mackerel, sardines, sardinella, brisling and sprats.

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



Poland



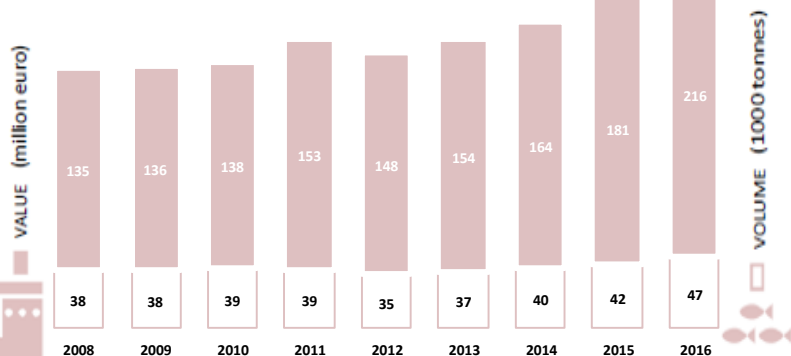
# TRADE (source: Eurostat)

## Import

MAIN COMMERCIAL SPECIES IMPORTED AND % OF TOTAL IMPORTS (2016, million euro)



SALMON	917	48%
HERRING	174	9%
COD	148	8%
ALLASKA POLLOCK	81	4%
TROUT	61	3%
MACKEREL	54	3%
OTHERS	475	25%

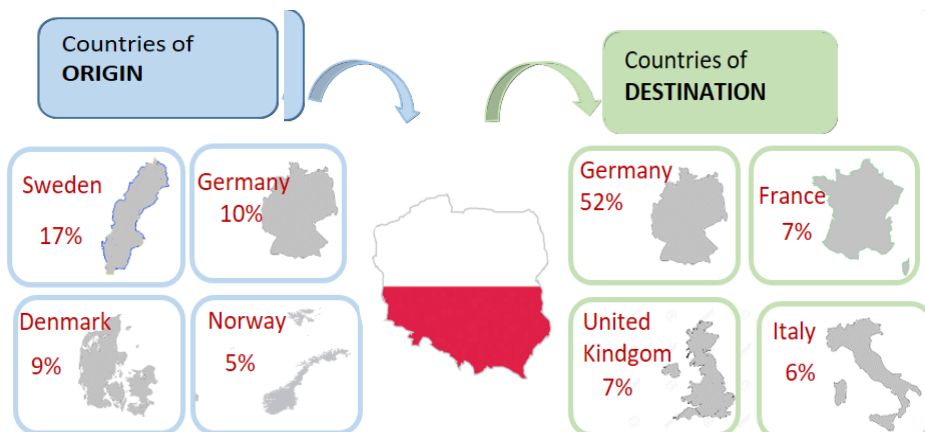
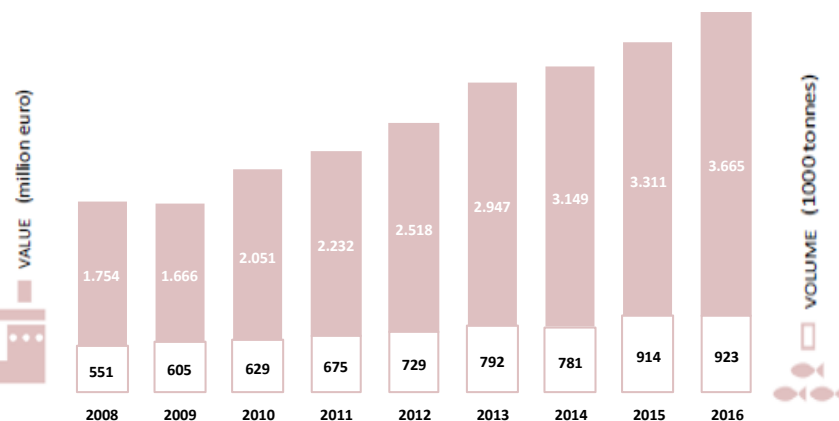


## Export

MAIN COMMERCIAL SPECIES EXPORTED AND % OF TOTAL EXPORTS (2016, million euro)



SALMON	881	48%
OTHER MARINE FISH	165	9%
HERRING	156	9%
COD	108	6%
TROUT	60	3%
MACKEREL	28	2%
OTHERS	432	24%

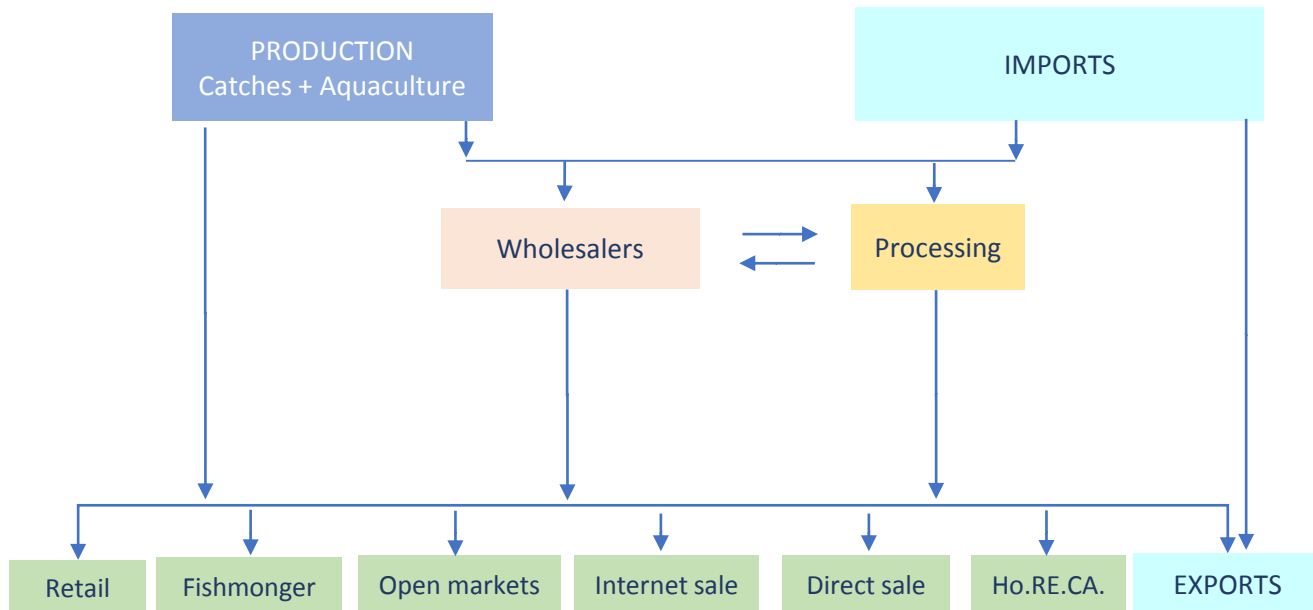




# DISTRIBUTION

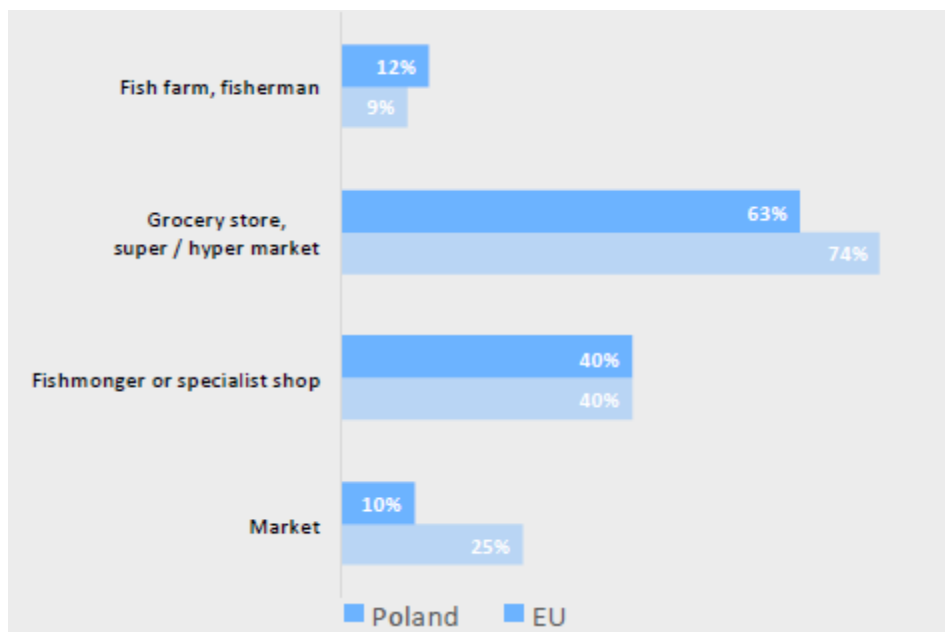
## The supply chain of fisheries and aquaculture products in Poland

(source: EUROFISH)



## Consumers preferences on purchasing channels

(source: EUROBAROMETER)

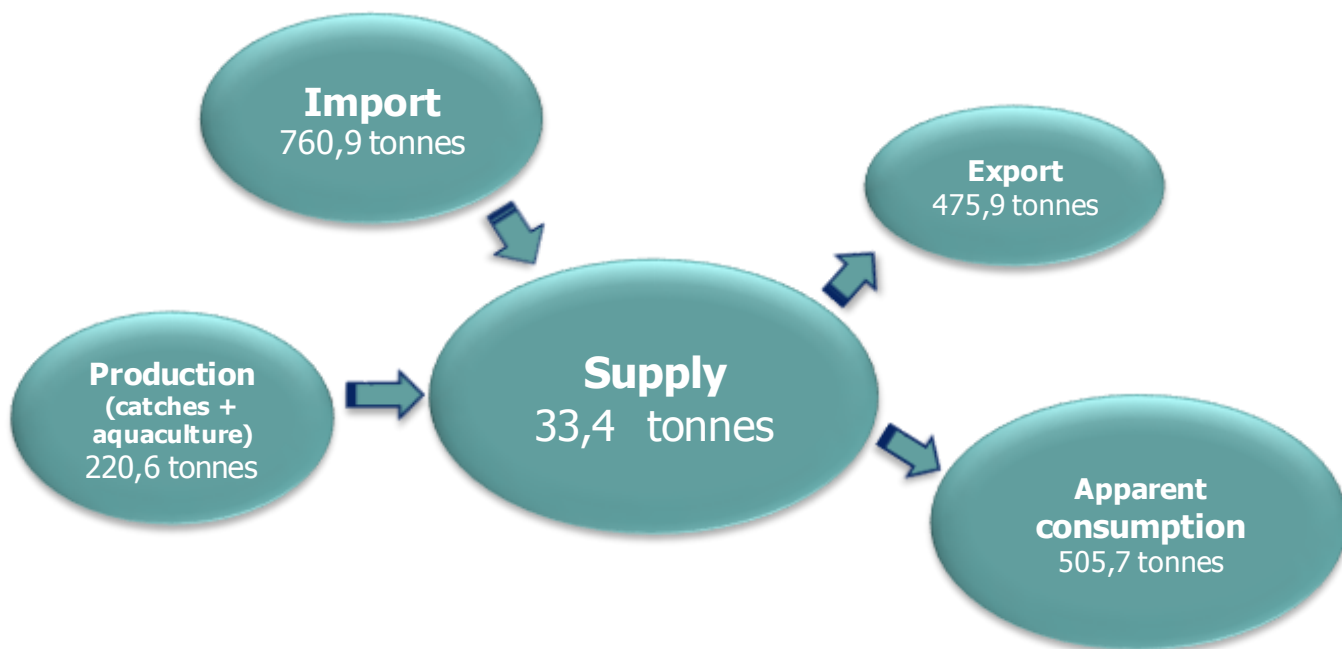




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## SUPPLY BALANCE (source: EUMOFA)







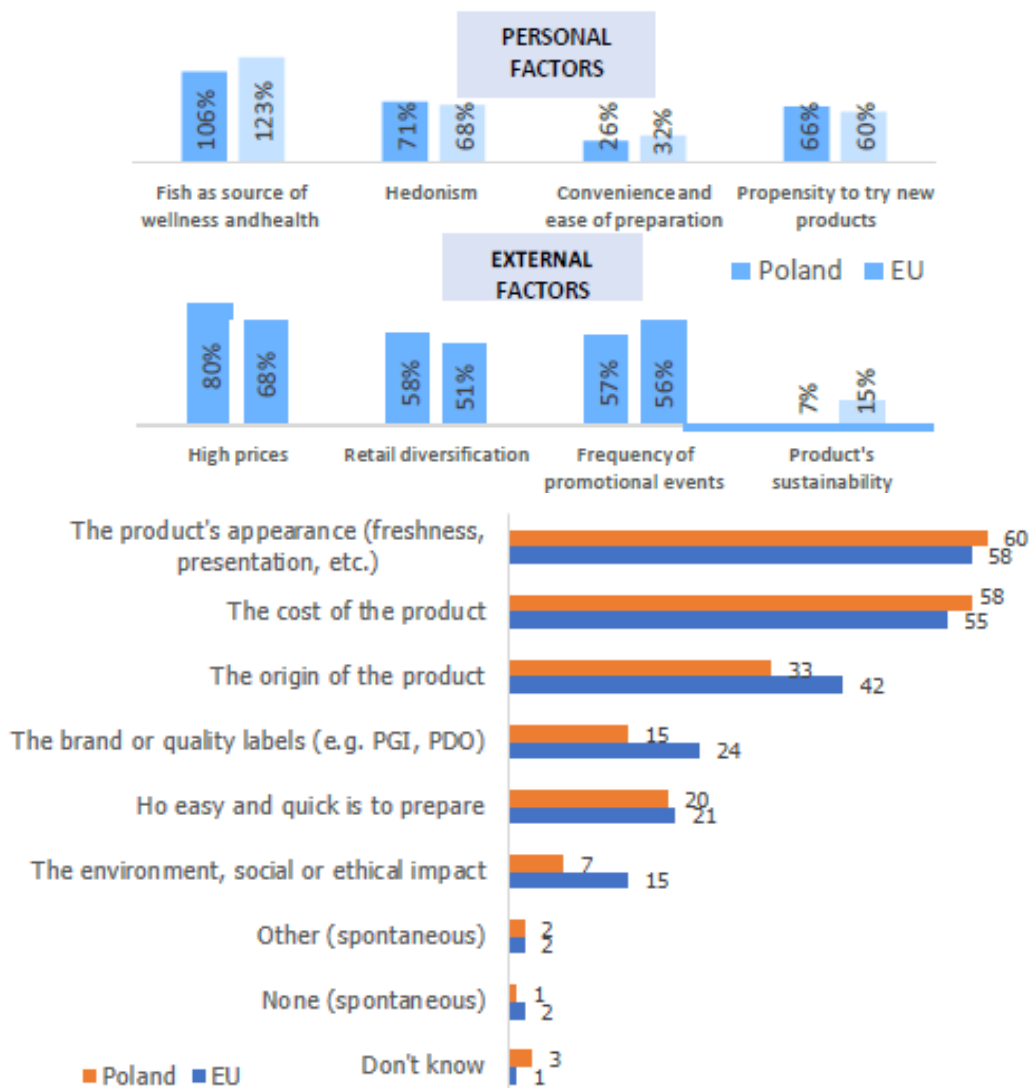
# CONSUMPTION

Apparent consumption of fisheries and aquaculture products in Poland amounted to **13,2 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 **Poland** 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 10 species and 5 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 40 places of sales. Click [here](#) for the list of auctions.

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

Prices are collected from **Poland** on a weekly basis. Data include all sales through METRO and cover a selection of 91 products. Data are accessible through simple and advanced tables.

## PROCESSING

Volumes and values are collected from **Eurostat – PRODCOM**. Data concern 30 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.