



Last update: 03/04/20

POLAND IN THE WORLD AND IN THE EU

2017, sources: Eurostat and FAO

In 2017, Poland was the EU's 9th largest producer of fishery products and the 8th largest in terms of aquaculture production.

(1.000 tonnes)	World	EU-28	Poland	% world	% EU-28
Catches	93.204	5.253	207	0,22%	3,94%
Aquaculture	111.966	1.372	37	0,03%	2,70%
Total	205.170	6.625	244	0,12%	3,68%

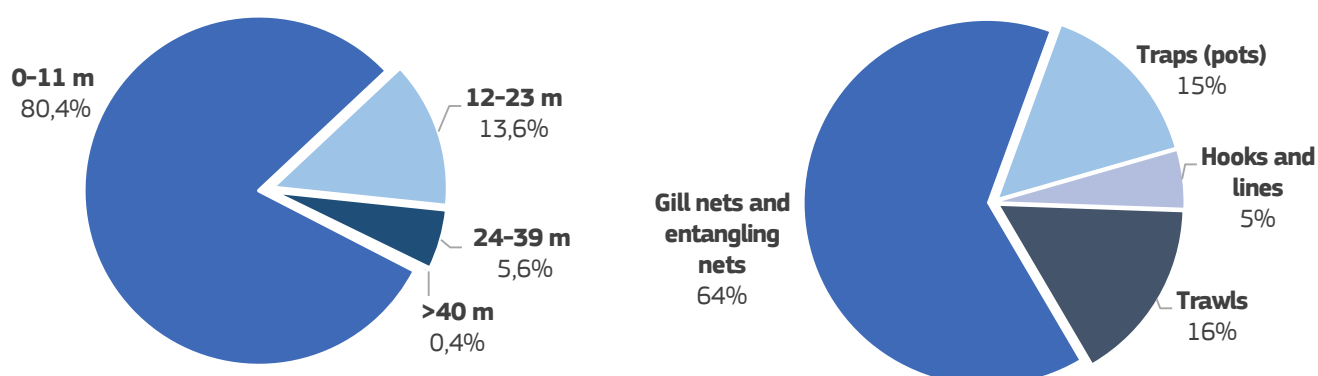
FISHING FLEET

Fleet: 2018, source: EU fishing fleet register - Eurostat Employment: 2017, source: JRC

Vessels (2018)	Capacity (2018)	Power (2018)	
Number: 827	Gross Tonnage: 32.350	Kilowatt: 80.227	
TOTAL FULL TIME EQUIVALENT (FTE), 2017: 2.285			
0-11 m	12-23 m	24-39 m	>40 m
Jobs (FTE): 55%	Jobs (FTE): 24%	Jobs (FTE): 12%	Jobs (FTE): 8%

The Polish fishing fleet by length and gear

(% of total number of vessels)





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LANDINGS

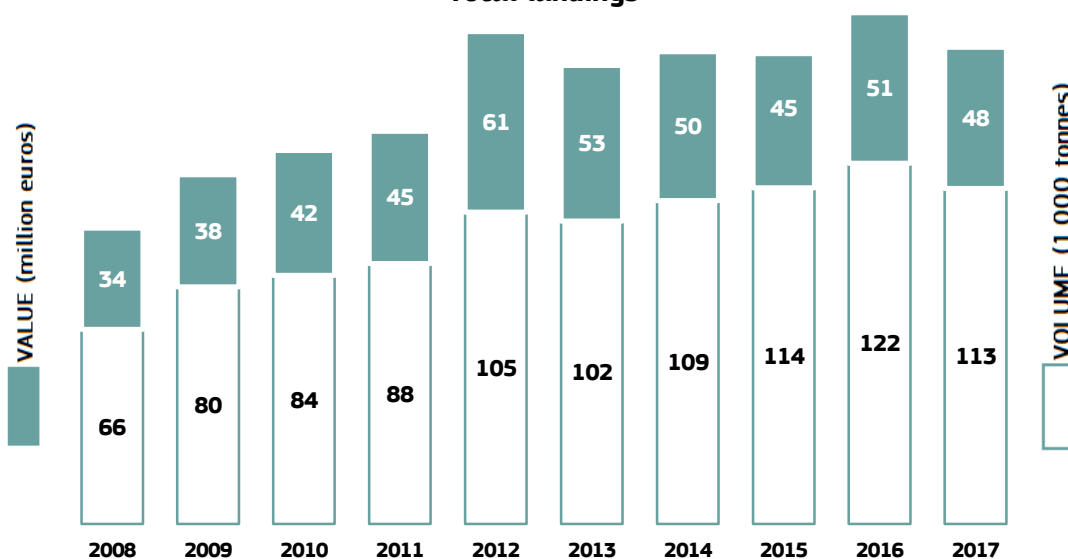
Source: EUMOFA, based on Eurostat data

Landings comprise the initial unloading of any fisheries products from on board a fishing vessel in a given EU Member State. They include aquatic plants and species not destined for human consumption. Landings are recorded in net weight and value, and concern landings made by vessels from EU Member States, Iceland and Norway.

Landings in Poland consist of fresh products only. In 2017, they were almost entirely destined for human consumption. Smaller quantities included products destined for animal feed and industrial uses.

There are 71 fishing ports registered in Poland (source: EU Master Data Register).

Total landings



Main commercial species landed and % of total

(2017, million euros and 1.000 tonnes)



Species	Value (million euros)	% of total value	Volume (1.000 tonnes)	% of total volume
COD	14	30%	50	44%
HERRING	13	26%	38	33%
SPRAT (=BRISLING)	9	19%	11	9%
EUROPEAN FLOUNDER	4	9%	11	9%
OTHERS	8	16%	3	5%



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AQUACULTURE

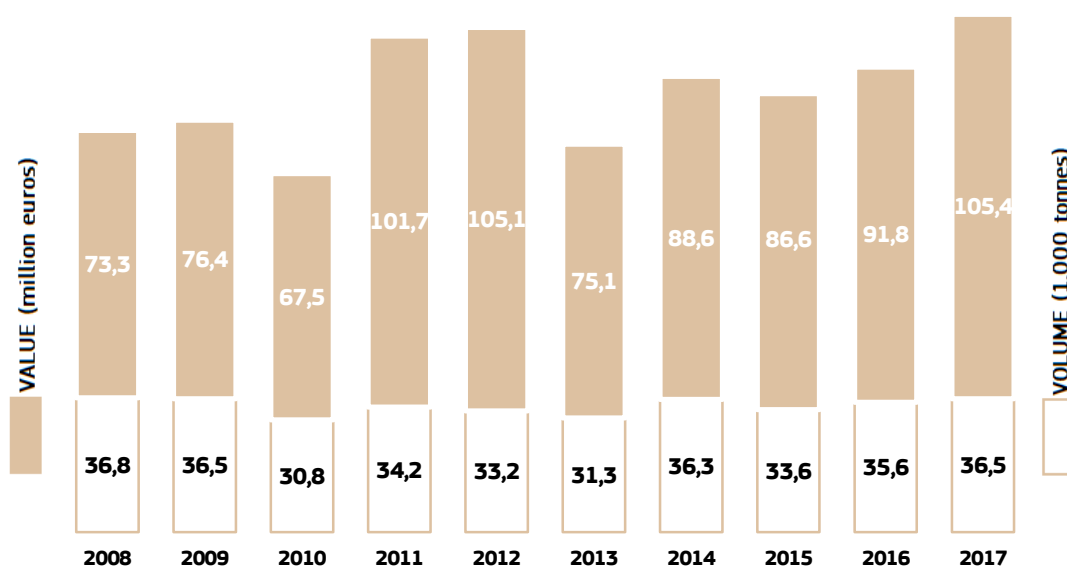
Source: EUMOFA, based on Eurostat and FAO data

Aquaculture consists in 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.

Aquaculture activity in Poland is limited to freshwater farming. The following main production methods were used in 2017:

- 52% of production: in ponds;
- 39% of production: in tanks and raceways;
- 5% of production: in recirculation systems;
- 3% of production: enclosures and pens;
- 1% of production: in cages.

Total production



Main commercial species farmed and % of total (2017, million euros and 1.000 tonnes)



Species	Value (million euros)	% of total	Volume (1.000 tonnes)	% of total
CARP	46,3	44%	18,3	50%
TROUT	41,6	40%	14,2	39%
SALMON	2,5	2%	0,7	2%
FRESHWATER CATFISH	2,5	2%	0,4	1%
OTHERS	12,5	12%	2,9	8%



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PRODUCER ORGANISATIONS

2019, source: DG MARE, [link](#)

In Poland, **17 producer organisations (POs)** are formally recognized. Their role is to contribute to the achievement of the objectives of the Common Fisheries Policy (CFP) and of the Common organisation of the markets (CMO) through the collective management of their members' activities.

Of the 17 POs, 12 operate in the fishery sector and five in aquaculture.

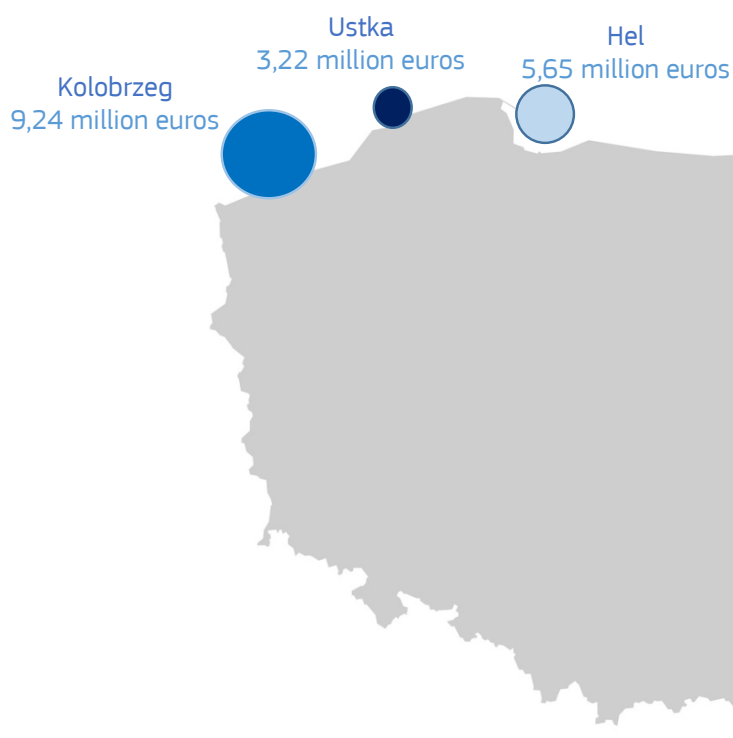
FIRST SALES

2019, source: EUMOFA

First sales concern 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 marine catches in Poland are sold to registered buyers. In 2019, total first sales in Polish places of sale amounted to 89.752 tonnes and 25 million euros.

The top-3 places of sale covered 80% and 72% of total first sales, respectively in volume and value terms.



Top-3 places of sale	Volume (tonnes)	Value (million euros)	Top-3 main commercial species (in value)
Kolobrzeg	30.394	9,24	Herring, European flounder, sprat (=brisling)
Hel	32.336	5,65	Sprat (=brisling), herring, trout
Ustka	9.363	3,22	Sprat (=brisling), cod, herring



WHOLESALE

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 one wholesale market, namely Metro (source: Eurofish).

PROCESSING

According to Eurostat-SBS, 18.180 persons were employed in the Polish fish processing industry in 2017. The sector recorded a value added of 455,6 million euros, covering 5% of the value added of total manufacture of food products. In 2018, the main products sold were “Smoked Pacific, Atlantic and Danube salmon (incl. fillets, excl. heads, tails and maws)” and “Fresh or chilled fish fillets and other fish meat without bones” (source: Eurostat-PRODCOM).

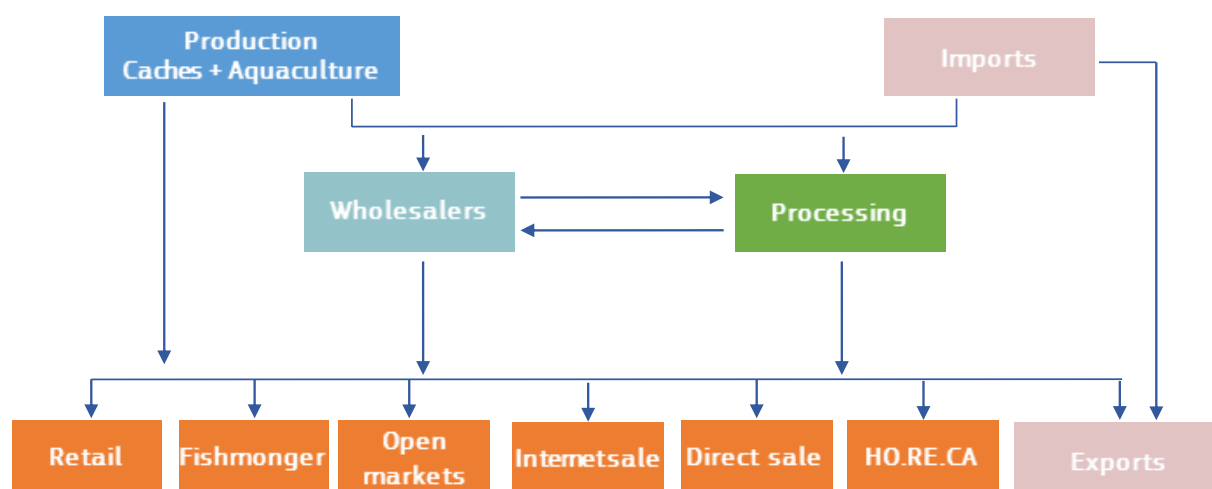
317 companies

Sales: 3,12 billion euros

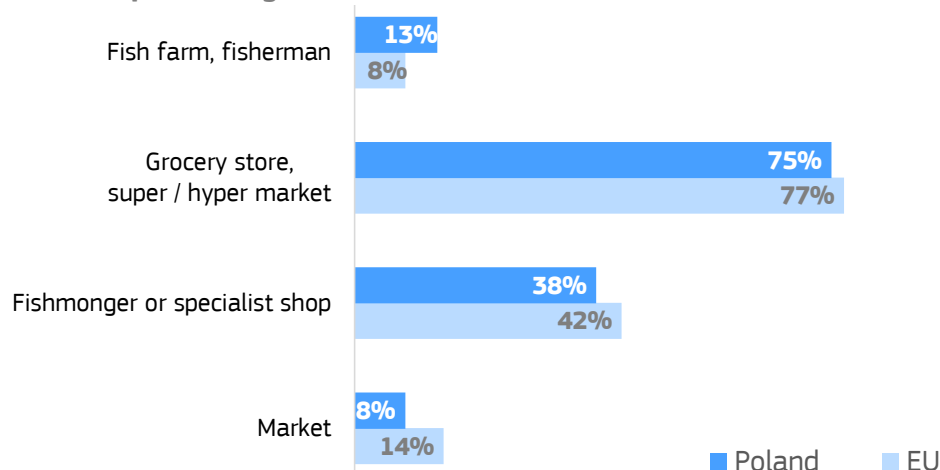
(2017, source: Eurostat - SBS)

DISTRIBUTION

The supply chain of fisheries and aquaculture products in Poland (source: Eurofish):



Consumer preferences on purchasing channels (source: Eurobarometer, 2018):



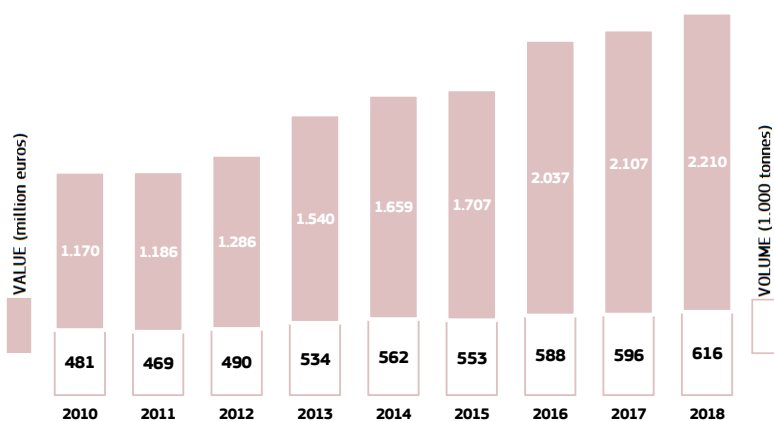


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IMPORT – EXPORT

Source: EUMOFA, based on Eurostat-COMEXT data

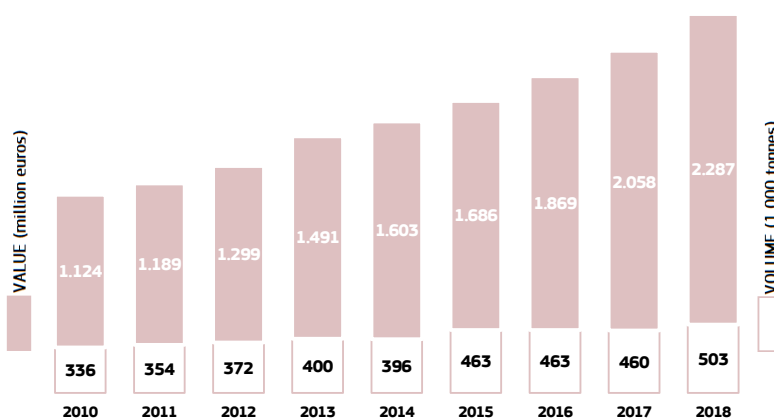
IMPORT



Main commercial species imported and % of total imports (2018, million euros)

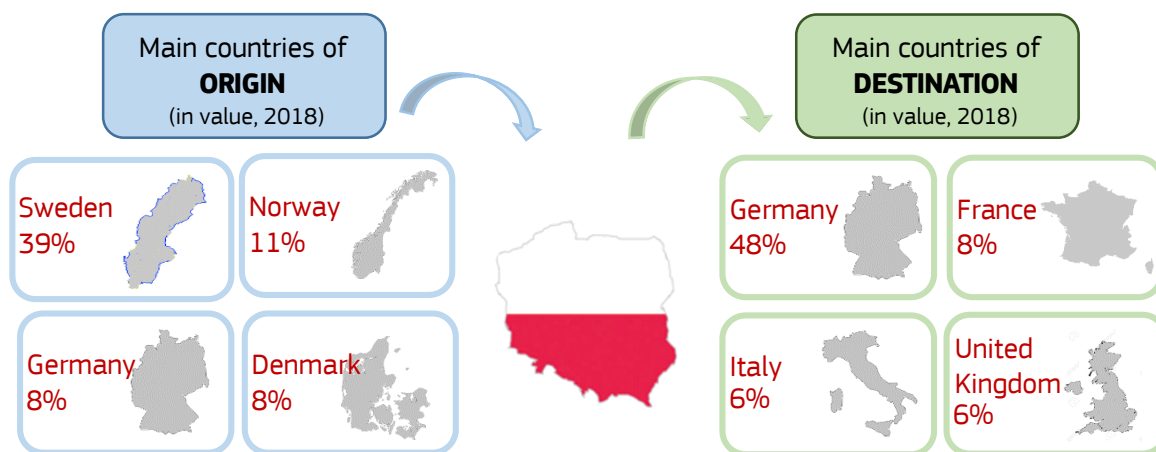
SALMON	1,138	52%
COD	204	9%
HERRING	122	6%
ALASKA POLLOCK	91	4%
MACKEREL	75	3%
OTHERS	580	26%

EXPORT



Main commercial species exported and % of total exports (2018, million euros)

SALMON	1,263	55%
OTHER MARINE FISH	183	8%
HERRING	145	6%
OTHER PRODUCTS	141	6%
COD	135	6%
OTHERS	420	19%





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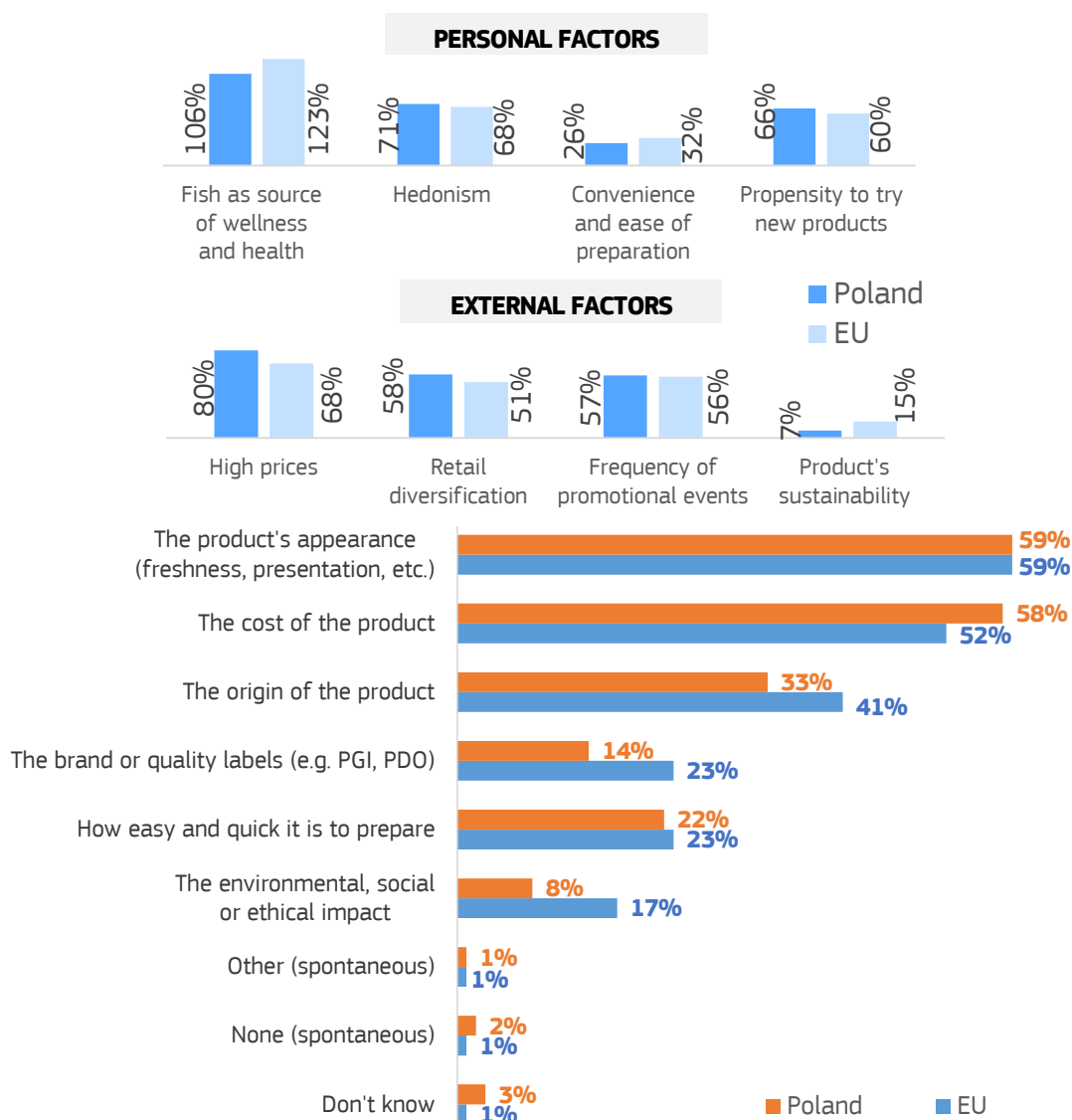
CONSUMPTION

In 2017, apparent consumption was estimated at 15 kg per capita, a slight increase compared with 2016 (+0,7%). The most consumed species were herring and Alaska pollock, as well as sprat, mackerel, Atlantic horse mackerel and cod (source: EUMOFA).

Regular consumers, namely those who eat fishery and aquaculture products at least once a month, mainly belong to age groups 40-54 and over 55. Young people (15-24) are less inclined to consume fish in Poland, as well as at EU level. In this category, regular consumers cover 67% of the total, the same percentage observed at EU level. Poles consume especially frozen and fresh products; loose fish (74%) is more frequently consumed than at EU level (68%) (source: EUMOFA, "EU consumer habits regarding fishery and aquaculture products", 2017).

15 kg
per capita
(2017, source: EUMOFA)

Purchasing factors (sources: up chart: EUMOFA, 2017; down chart: Eurobarometer, 2018)





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THE COUNTRY IN EUMOFA



LANDINGS

Volumes and values are collected from Eurostat – Fishery. They are available on a yearly basis and accessible through simple and advanced tables, and through the bulk download facility.

FIRST SALES

Volumes and values are collected from the Ministry of Maritime Economy and Inland Navigation on a weekly and monthly basis.

Weekly data are monitored for a selection of 9 main commercial species and 9 places of sale (click [here](#) for the full list). Monthly data cover all species sold in all Polish places of sale. Both are accessible through simple and advanced tables, as well as through the bulk download facility. As for monthly first sales, data at disaggregated level are also accessible, through a dedicated advanced table and the bulk download facility.

IMPORT - EXPORT

Volumes and values are collected from Eurostat – COMEXT. Data concern trade flows of all fisheries and aquaculture products as recorded by national customs.

They are available on a monthly and yearly basis and accessible through simple and advanced tables, as well as through the bulk download facility.

AQUACULTURE

Volumes and values are collected from Eurostat – Fishery and integrated with FAO data. They are available on a yearly basis and accessible through simple and advanced tables, and through the bulk download facility.

WHOLESALE

Prices are collected from the Fish Market Development Association on a weekly basis. Data cover sales from Makro Cash & Carry of a selection of 20 main commercial species (click [here](#) for the full list).

Data are accessible through simple and advanced tables, as well as through the bulk download facility.

PROCESSING

Data are collected from Eurostat – PRODCOM. They concern ex-farm quantities and values of fisheries and aquaculture products sold in the country after being transformed from raw material into final products.

They are available on a yearly basis and accessible through simple tables, and through the bulk download facility.

CONSUMPTION

Volumes and values of household consumption of fresh fisheries and aquaculture products are collected from Europanel based on panel reporting. Data are monitored for 4 main commercial species + the item “Others”, aggregating all other species (click [here](#) for the full list). Data are available on a monthly and yearly basis and accessible through simple tables and the bulk download facility.

Moreover, retail prices of a selection of 15 main commercial species are collected on a monthly basis from Główny Urząd Statystyczny (click [here](#) for the full list). Average weekly prices are accessible through simple and advanced tables, as well as through the bulk download facility.