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## POLAND IN THE WORLD AND IN THE EU

2019, sources: Eurostat and FAO

In 2019, Poland was the EU's 8<sup>th</sup> largest producer of fishery products and the 7<sup>th</sup> largest in terms of aquaculture production (for both cases UK has been included).

(1.000 tonnes)	World	EU-28	Poland	% world	% EU-28
Catches	93.519	4.824	199	0,21%	4,1%
Aquaculture	120.104	1.367	43	0,04%	3,1%
<b>Total</b>	<b>213.623</b>	<b>6.191</b>	<b>242</b>	<b>0,11%</b>	<b>3,9%</b>

## FISHING FLEET

Fleet: 2019, source: EU fishing fleet register - Eurostat

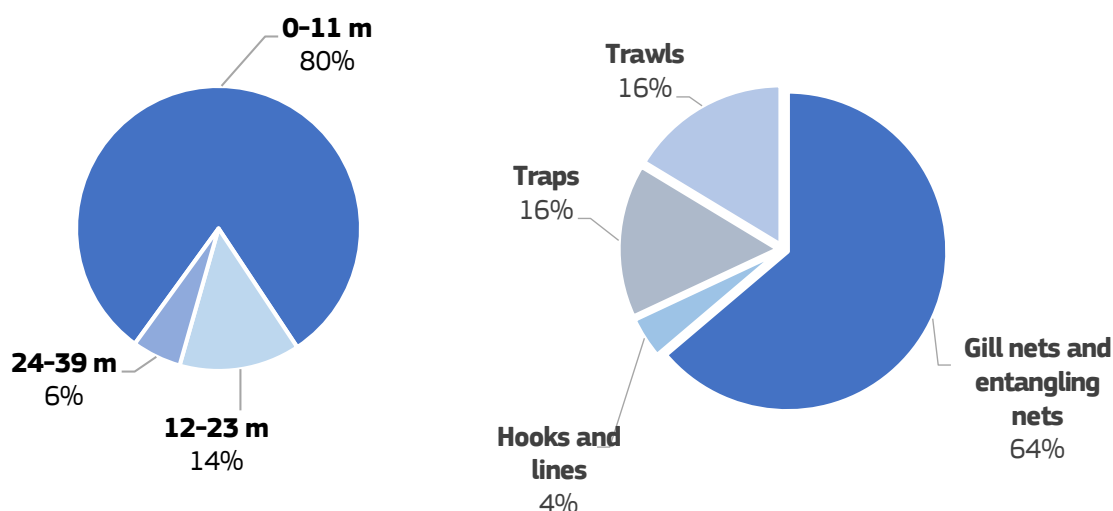
Employment: 2018, source: JRC

Vessels (2019)	Capacity (2019)	Power (2019)	
Number: 826	GT: 32.327	KW: 80.216	
TOTAL FTE: 2.355 (2018, source: JRC)			
0-11 m	12-23 m	24-39 m	>40 m
Jobs (FTE): 64%	Jobs (FTE): 21%	Jobs (FTE): 11%	Jobs (FTE): 4%

GT: Gross tonnage - KW: Kilowatt - FTE: Full Time Equivalent

### The Polish fishing fleet by length and gear

(% of total number of vessels)





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## LANDINGS

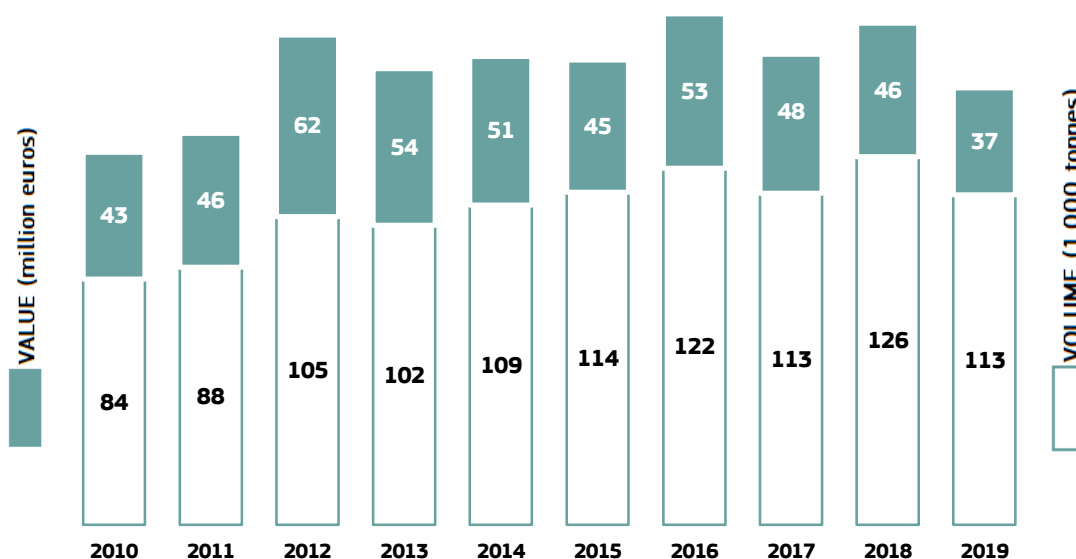
Source: EUMOFA, based on Eurostat data.

Landings comprise the initial unloading of any fisheries products from on board a fishing vessel in a given Member State. The landings also 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, Norway and the UK.

Landings in Poland consist of fresh products only. In 2019, they were almost entirely destined for human consumption (96%). Smaller quantities included products destined for animal feed and industrial uses.

There are 79 fishing ports registered in Poland (source: EU Master Data Register, 26 November 2021).

**Total landings.** Values are deflated by using the GDP deflator (base=2015)



### Main commercial species landed and % of total

2019, million euros (nominal value) and 1.000 tonnes



Species	Value (million euros)	% of total	Volume (1,000 tonnes)	% of total
HERRING	9,1	24%	52	46%
SPRAT (=BRISLING)	8,6	23%	34	30%
COD	6	16%	14	13%
EUROPEAN FLOUNDER	5	13%	4	4%
OTHER FRESHWATER FISH	3	8%	3	3%
OTHERS	6	16%	5	4%

SPRAT (=BRISLING)

HERRING

EUROPEAN FLOUNDER

COD

OTHER FRESHWATER FISH

OTHERS



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## AQUACULTURE

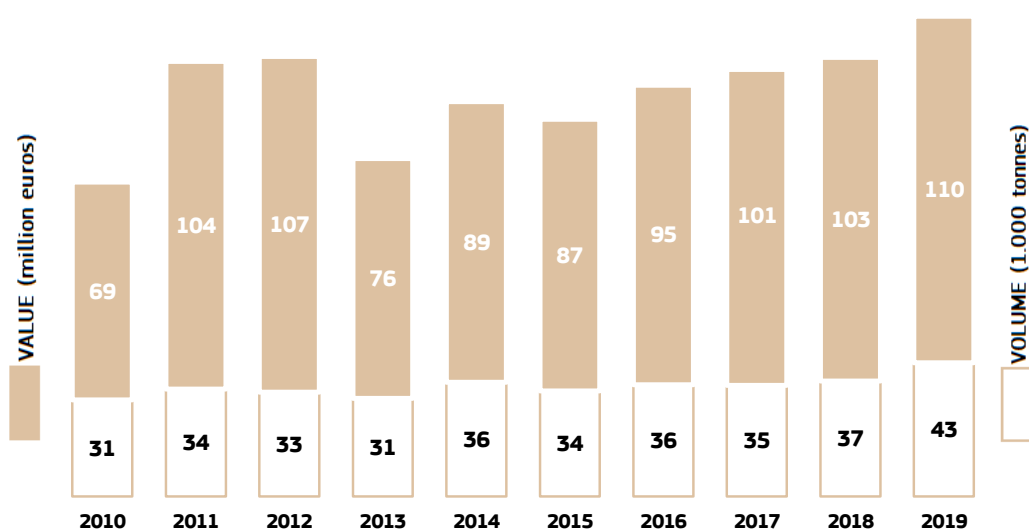
Source: EUMOFA, based on Eurostat and FAO data.

Aquaculture consists in the farming of aquatic (fresh 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 2019:

- 52% of production: in ponds;
- 40% of production: in tanks and raceways;
- 5% of production: in recirculation systems;
- 3% of production: enclosures and pens;

**Total production.** Values are deflated by using the GDP deflator (base=2015)



**Main commercial species farmed and % of total**  
2019, million euros (nominal value) and 1.000 tonnes



Species	Value (million euros)	% of total	Volume (1,000 tonnes)	% of total
TROUT	48	41%	20	47%
CARP	40	35%	16	38%
OTHER FRESHWATER FISH	15	13%	4	9%
OTHER SALMONIDS	6	6%	2	4%
SALMON	3	3%	1	1%
OTHERS	2	2%	1	1%



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## PRODUCER ORGANISATIONS

Data as of 15-12-2021, source: DG MARE, [link](#)

In Poland, **16 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 16 POs, 12 operate in the fishery sector and 4 in aquaculture.

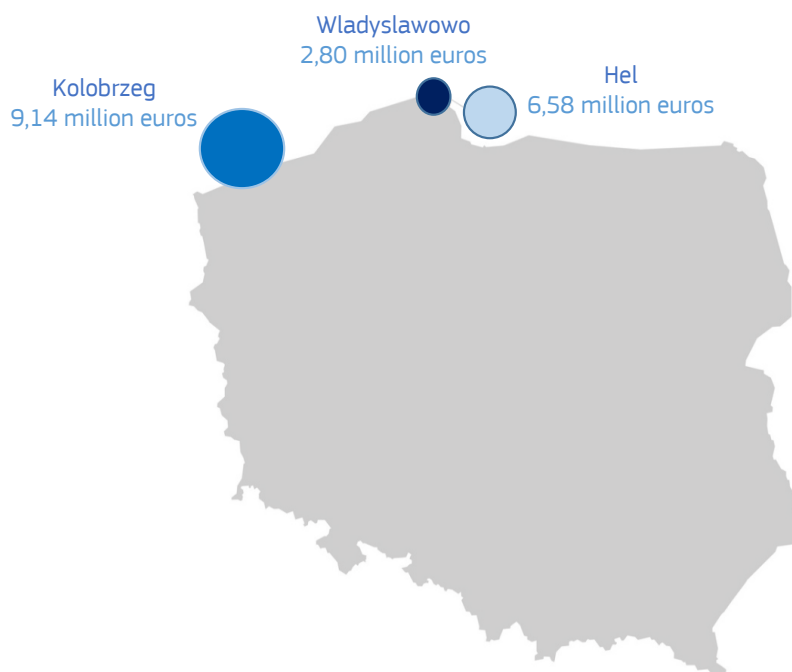
## FIRST SALES

2021, 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 2020, total first sales in Polish places of sale amounted to 90.955 tonnes and 23 million euros.

The top-3 places of sale covered 87% and 81% 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	32.704	9	Herring, sprat (=brisling), European flounder
Hel	33.982	7	Sprat (=brisling), herring, European flounder
Wladyslawowo	12.848	3	Herring, sprat (=brisling), cod



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## 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, 18.879 persons were employed in the Polish fish processing industry in 2019. The sector recorded a value added of 481,2 million euros, covering 4% of the value added of total manufacture of food products. In 2020, 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).

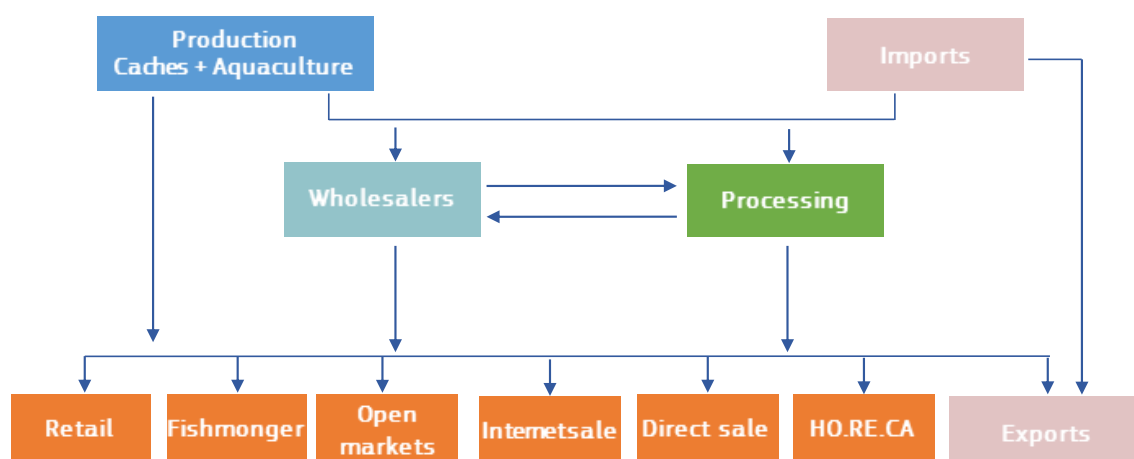
**338 companies**

**Sales: 3,4 billion euros**

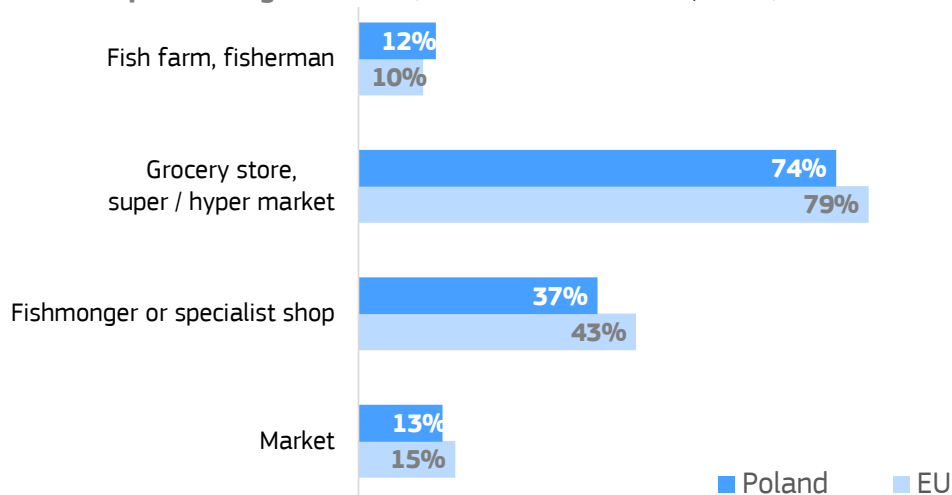
(2019, source: Eurostat - SBS)

## DISTRIBUTION

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



Consumer preferences on purchasing channels (source: Eurobarometer, 2021):





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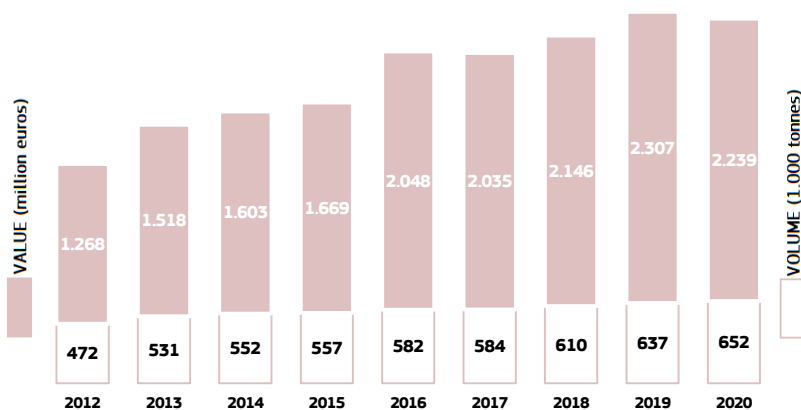
## IMPORT – EXPORT

Source: EUMOFA, based on Eurostat-COMEXT data. Values in the bar charts are deflated by using the GDP deflator (base=2015).

### IMPORT

#### Main commercial species imported and % of total imports

2020, million euros (nominal value)

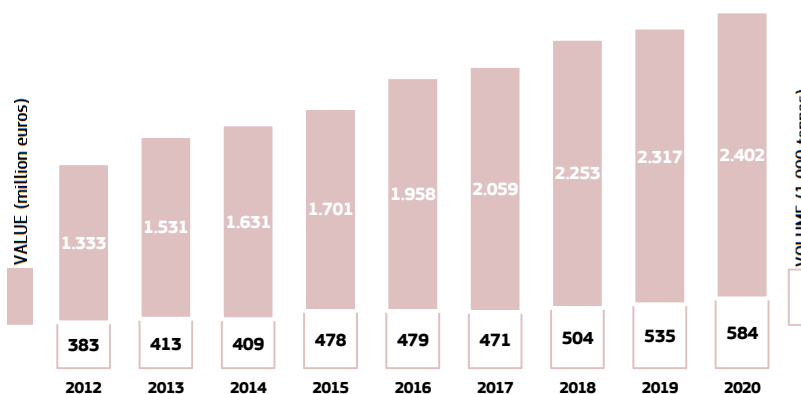


SALMON	1,205	52%
COD	173	7%
ALASKA POLLOCK	129	6%
HERRING	121	5%
MACKEREL	95	4%
OTHERS	598	26%

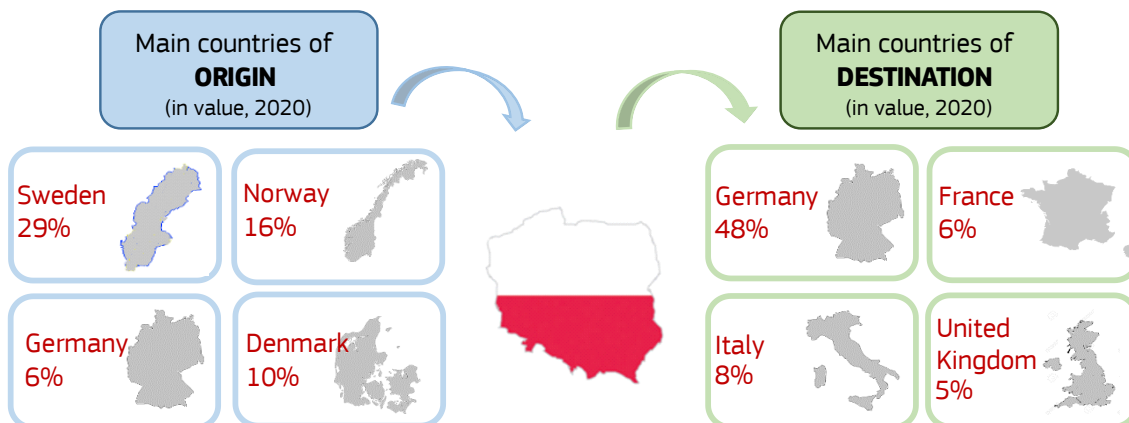
### EXPORT

#### Main commercial species exported and % of total exports

2020, million euros (nominal value)



SALMON	1,412	56%
OTHER MARINE FISH	202	8%
HERRING	147	6%
OTHER PRODUCTS	147	6%
COD	113	4%
OTHERS	492	20%





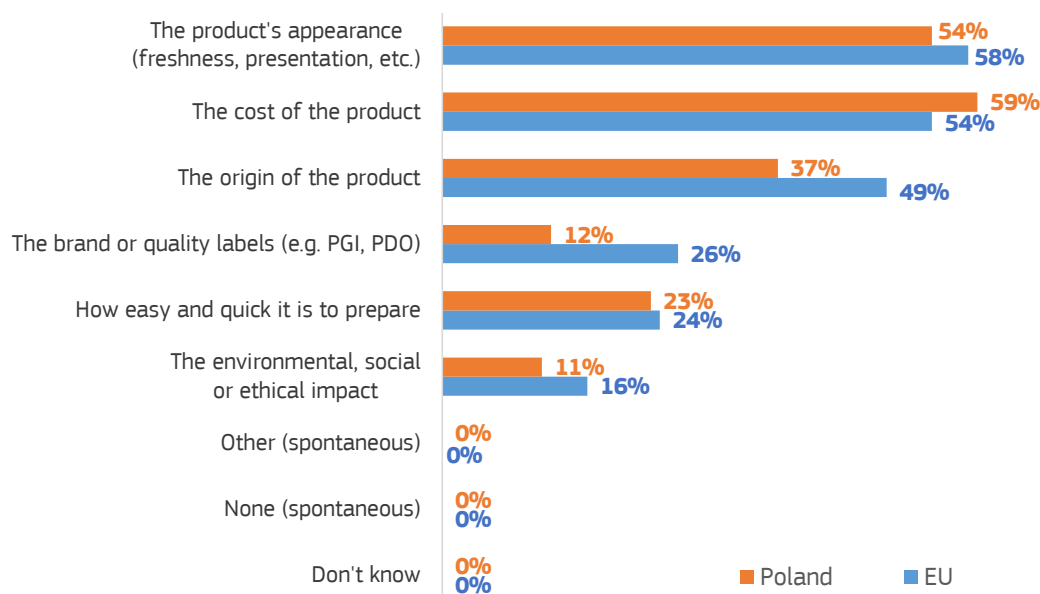
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## CONSUMPTION

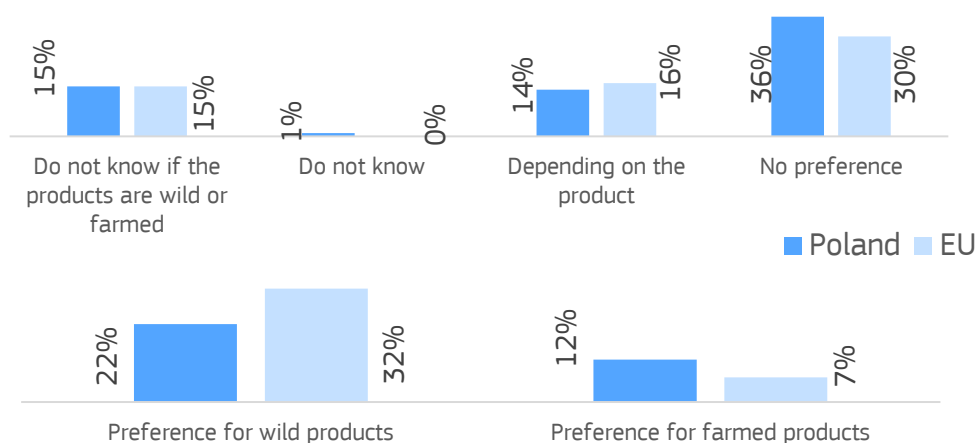
In 2019, apparent consumption was estimated at 13,11 kg per capita, a slight increase compared with 2018 (+1%). The most consumed species were herring and Alaska pollock, as well as sprat, mackerel, Atlantic horse mackerel and cod (source: EUMOFA). Regular consumers, namely those who eat fishery and 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-28 level. In this category, regular consumers cover 67% of the total, the same percentage observed at EU level (UK included). Poles consume especially frozen and fresh products; loose fish (74%) is more frequently consumed than at EU level (68%, UK included) (source: EUMOFA, "EU consumer habits regarding fishery and aquaculture products", 2017).

**13,11 kg**  
per capita in live  
weight equivalent  
(2019, source: EUMOFA)

### Purchasing factors (source: Eurobarometer, 2021)



### Preferences regarding wild or farmed product (source: Eurobarometer, 2021)





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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, in addition + 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.