

Voluntary Report – Voluntary - Public Distribution

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Report Name: Fish and Seafood Market Brief

Country: Poland

Post: Warsaw

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Report Highlights:

The Polish fish processing industry is the fourth largest in Europe, with 240 processing plants shipping products throughout the EU. Several hundred other smaller companies also supply products within the immediate region. In 2019 fish consumption in Poland averaged 13.1 kilograms per capita, almost half of the EU average. 2020 fish and seafood imports amounted \$2.4 billion, of which \$75 million originated from the United States. Polish processors generally import raw fish for further processing.

General Information

Production

The Polish fish processing industry is the fourth largest in Europe and supplies EU markets with processed products, including smoked fish (salmon and trout), pollock, canned fish (herring, mackerel, and sprat), and ready-to-eat fish products (salads and marinated fish). 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 2019, the overall output of the Polish fish processing industry was 588,000 metric tons (MT), valued at PLN 12 billion (\$3.2 billion). Currently, 240 processing plants are eligible to export to the EU. Several hundred additional smaller and often family-run companies sell products to regional markets. In 2019, the fish processing industry employed approximately about 12,000 people.

Consumption

2019 fish consumption in Poland was 13.1 kg/per capita, about half of the EU's consumption average. Herring, pollock, and mackerel are the most popular saltwater species, while carp, trout, and bass are the most popular freshwater species. Pollock is the most widely consumed fish in Poland due to its relatively low price. Despite growing imports of cheaper Russian pollock, Polish consumers are increasingly more informed and quality-conscious regarding fish products. Poland's growing demand for high-quality fish and seafood offers opportunities for U.S. suppliers.

Distribution

Seafood is sold in stores ranging from specialized stores, supermarkets, and hypermarkets, to small independent grocers. Supermarkets and hypermarkets offer the most dedicated shelf space and broader selections of processed seafood products. Many hypermarkets also feature extensive fresh seafood products, including tanks for live fish. Small, independent grocers typically lack this option, but offer processed, frozen branded, and frequently with non-branded, generic fillets. Carp is the most traditionally served during Christmas in Poland.

Trade

In 2020, Poland imported 562,244 MT of fish and seafood valued at over \$2.4 billion. Norway was Poland's main fish supplier. Other significant shippers included Russia, China, Sweden, Iceland, and the United States. Poland is one of the biggest salmon importers in the world and sources fish from Norway, Sweden, and the United States. In 2020, the value of Polish imports of fish and seafood remained unchanged in comparison to 2019, however, the value of imports from the United States decreased by 25 percent (Table 1).

Table 1. Value of Imports of Fish and Seafood to Poland (\$ million)

	2015	2016	2017	2018	2019	2020	2020/2019 (percent)
World	1,710	2,066	2,166	2,408	2,431	2,432	0
Norway	751	989	961	1,153	1,174	1,248	6
Russia	63	74	85	116	116	145	25
China	113	108	109	110	137	132	-4
Sweden	136	151	191	256	182	131	-28
Iceland	45	50	61	80	100	113	13
United Kingdom	40	57	46	55	59	78	31
United States	59	72	77	79	100	75	-25
Denmark	88	117	110	58	66	58	-12
Germany	85	87	103	91	67	57	-14
Ireland	15	12	32	18	29	48	65

Source: Central Statistical Office published by TDM

Market disruptions caused by COVID-19 led to a drop of U.S. fish and seafood imports. According to the information from the Polish Association of Fish Processors (PAFP), in early 2020, major importers/processors of fish and seafood built stocks, which resulted in lower imports after March 2020 following the COVID-19 outbreak.

Sockeye and Pacific salmon accounted for the biggest drop of imports in 2020, because of reduced demand from the hotel, restaurants, and institutional (HRI) sector due to COVID-19 restrictions. However, imports of Alaska pollock fillets were up three percent (Table 2). According to the PAFP, despite the COVID-19 pandemic in 2020 the processing industry continued to operate on full capacity. Domestic consumption remained stable, although consumers tended to buy more canned products. According to the PAFP, some processing plants changed their production profile by responding to this demand and producing more canned products.

Table 2. Value of Imports of U.S. Alaska Pollock to Poland (\$ million)

HS Code	Description	2015	2016	2017	2018	2019	2020	2020/19 (percent)
030475	Alaska pollock (<i>Theraga Chalcogramma</i>) Fillets, Frozen	23,4	27,4	21,5	31,2	29,5	30,4	3
030494	Alaska pollock (<i>Theraga Chalcogramma</i>), Frozen, Except Fillets	7,1	7,6	6,1	3,7	3,4	5,9	72

Source: Central Statistical Office published by TDM

Another factor, which negatively affected imports was reduced in-person marketing activities due to COVID-19 restrictions. During regular years, FAS Warsaw office attends Seafood Expo Global show and actively connects Polish importers with attending U.S. exporters.

Current 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.

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.

Market Entry Strategy

Trade missions coordinated through industry/export organizations and trade shows like the Seafood Expo Global Exposition are important for understanding the market, consumer preferences, and building contacts with importers. Poland has its own tradeshow, POLFISH, held biannually in Gdansk on the Baltic Sea in Northern Poland. The next POLFISH trade show is scheduled for June 1-3, 2022. To identify importers or find local partners, U.S. exporters may wish to consider the following organizations:

Polish Association of Fish Processors (PAFP)

PAFP is a 60-member national organization for Polish fish processing companies. The main goal of PAFP is to unify industry trade objectives, protect the interests of its members, as well as promote fresh and processed fish consumption. PAFP also represents the fish processing industry within the European Union.

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Address: Slowianska 5, 75 - 846 Koszalin
Phone/fax: (+48 94) 347 13 28
Cell.: (+48) 606 307 238 or (+48) 600 456 585
www.pspr.pl E-mail: pspr@pspr.pl

Fish Importers Association

This non-profit organization was founded in 2003. It seeks to represent the business interests of the members, support the fish market development in Poland, promote healthy aspects of seafood consumption, and propagate high ethics standards in business.

Stowarzyszenie Importerow Ryb
Address: Celna 1/117 70-644 Szczecin, Poland
Phone: (+48 91) 462-33-92
Fax: (+48 91) 462-49-02
E-mail: info@sir.org.pl
http://sir.org.pl/index_e.php

Market Promotion

The Polish market offers many promotional opportunities ranging from in-store promotions to B2B meetings and educational seminars. Successful fish and seafood promotion can occur in hypermarkets and specialty shops. Importers and wholesalers can promote products in restaurants and hotels, and through professional trade publications.

Despite COVID-19 restrictions in 2021, FAS Warsaw conducted several successful on-line and hybrid outreach activities in support of U.S. origin fish and seafood products:

- Launch of *DelicioUS!* program – salmon, pollock, and lobster, January 25-29, 2021

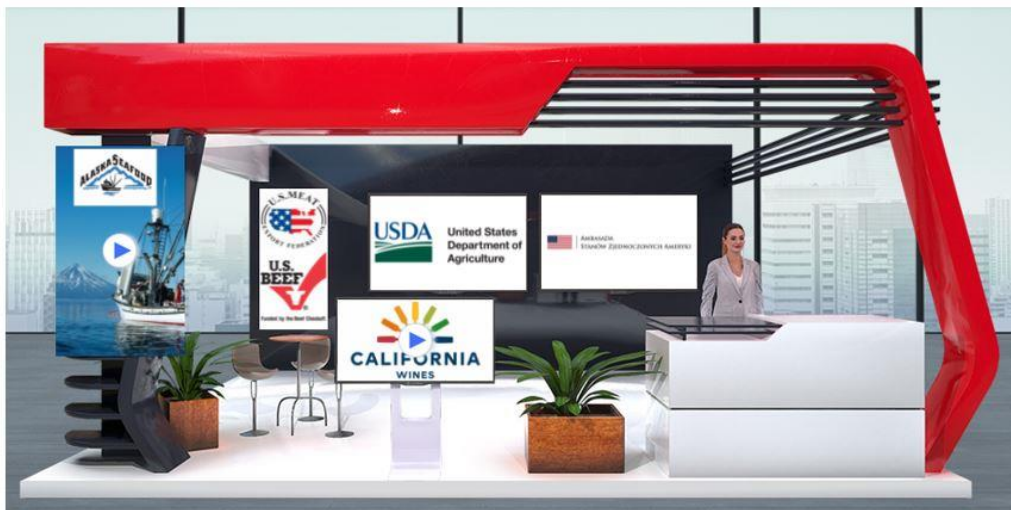


46 835
Liczba odbiorców

797
Aktywność

Promowanie niedostępne

- Participation in on-line edition of the [WorldFood Poland Trade Fair](#) Warsaw, Poland April 20-22, 2021.



- Organization of [HORECA Krakow – American Culinary Discoveries](#) April 26-27, 2021

Salmon and pollock:



Lobster:



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For additional information regarding the Polish market please contact:

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Attachments:

No Attachments.