



Marine
Stewardship
Council

Small Pelagics Market Analysis 2025: Poland

Polish Market Overview: Small pelagic fish & MSC certification

IN 2023, THE AVERAGE CONSUMPTION of small pelagic fish in Poland reached 4.39 kg per person, making it the second most consumed wild fish category. These species accounted for 32% of total seafood consumption, with the market size reaching 80,700 metric tonnes in live weight. Herring, mackerel, and sprat remain the most popular species.¹

Challenges in Baltic Fisheries

Baltic herring stocks face severe declines. Catches of western Baltic herring (ICES 20-24) dropped to 150-200 metric tonnes in 2023, compared to nearly 200,000 tons in previous years. Similarly, central Baltic herring (ICES 25-29, 32) catches have fallen to 20,000 from 300,000 metric tonnes.²

The Baltic sprat situation is also concerning. In 2023, total catches reached 266,000 metric tonnes, a 10% decline from the previous year and 50% below 1997's peak.² For 2025, the TAC for Polish sprat fishery is set at 41,000 metric tonnes (-31% year-on-year), still higher than the -42% reduction proposed by the EU Council and eNGOs.

Decline in MSC-Certified Products

A few years ago, small pelagic fish dominated the MSC-certified seafood sector in Poland, with over 200 SKUs. Today, the share has fallen to just 4.3%, mainly due to key fisheries failing to meet MSC standards:

- Atlantic mackerel fisheries have been suspended since 2019 due to poor management and overfishing risks. Pacific jack mackerel, widely available in Western Europe, remains absent in Poland.³
- AS (NSS) herring does not meet MSC certification criteria⁴, but alternatives from the North Sea, Iceland, Bothnian Bay, and Gulf of Riga are available and successfully utilized in other markets.⁵ While Czechia's herring retail market (3,500 metric tonnes) surpasses Poland's (just under 3,000 metric tonnes), Poland Market was 12,000 metric tonnes only four years ago. However, growth is expected, with 51 new MSC-certified herring products launched in Poland this year.
- Baltic sprat fisheries lost MSC certification in 2023, eliminating MSC-certified sourcing options.⁶ However, international efforts are underway to reintegrate sprat into the MSC program, with strong support from Graal and Thai Union.





Market Shifts & Industry Leadership

The MSC-certified small pelagic sector has transformed significantly in the past five years. In 2019, key retailers such as Biedronka, Lidl, Kaufland, and Aldi, alongside producers like Seko, Mirko, Thai Union, and Contimax, dominated the market.

Today, only Lidl, Aldi, and Kaufland maintain their commitment to MSC-certified herring. Poland remains the world's second-largest processor of MSC herring, supplying global markets, including Germany, Central Europe, the USA, and Australia. This underscores the country's role in sustainable seafood production.

The Path Forward

To ensure long-term market stability and secure supply chains, further promotion of sustainable fishing practices and consumer awareness is essential. Expanding the availability of MSC-certified products will not only help preserve fish stocks but also

strengthen the industry's resilience and commitment to sustainability. ●

¹ Rynek Ryb nr 35, Tabela 17.

² Wiadomości Rybackie, WR 9-10 (261), s. 10

³ <https://www.msc.org/pl/dla-rybakow-i-biznesu/kluczowe-gatunki-w-programie-msc/ryby-pelagiczne-na-pln-wsch-atlantyku>

⁴ <https://www.msc.org/pl/dla-rybakow-i-biznesu/kluczowe-gatunki-w-programie-msc/sledz>

⁵ <https://fisheries.msc.org/en/fisheries/>

⁶ <https://www.msc.org/pl/dla-mediow/informacje-prasowe/informacja-prasowa/zawieszenie-certyfikatow-msc-dla-baltyckich-polowow-szprot>

More about herring in MSC program:





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Find out more: <https://www.msc.org/species/small-pelagic-fish>

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