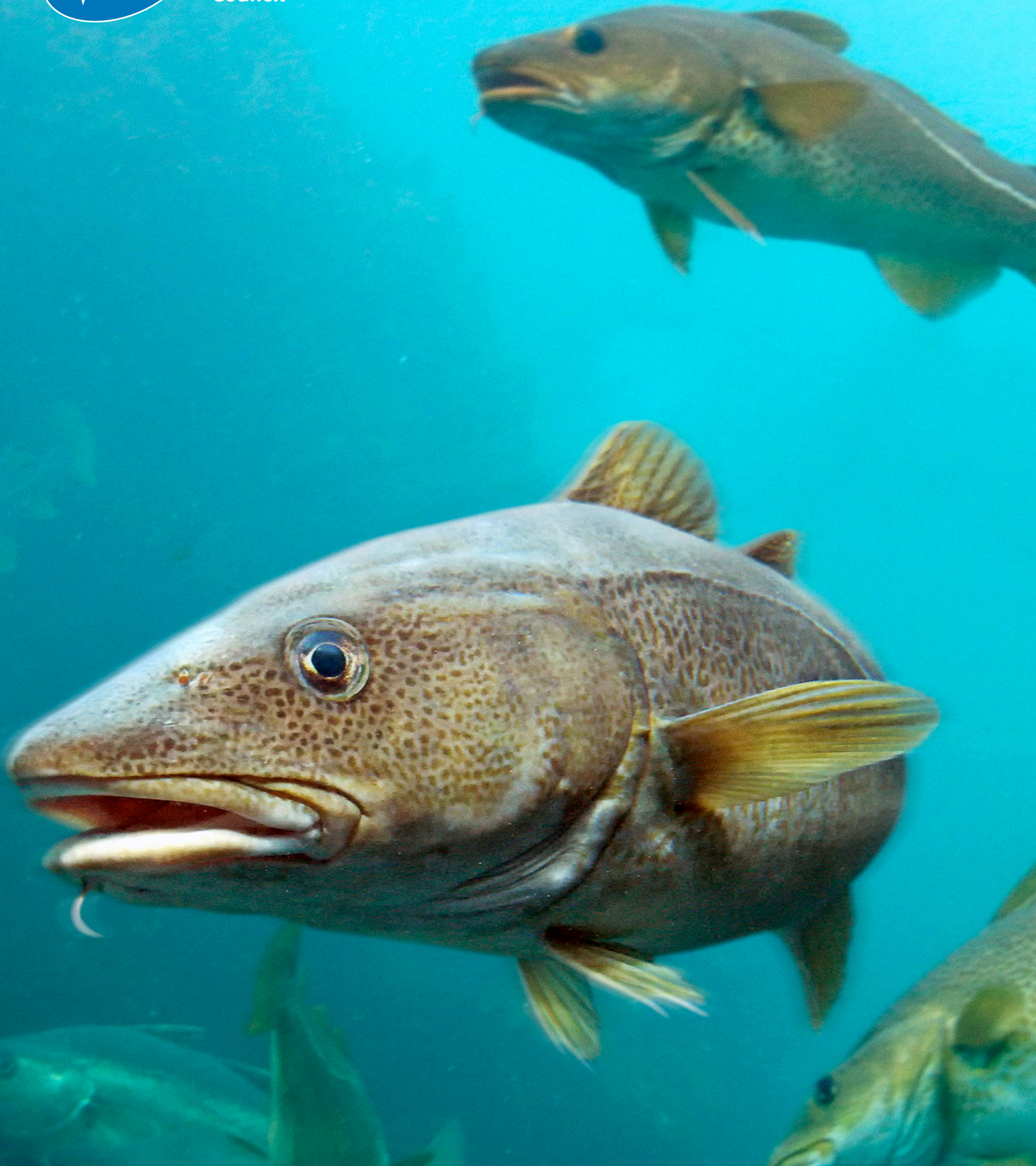




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Whitefish Market Analysis 2024: Poland

Market Analysis: Polish whitefish

IN 2023, TOTAL WHITEFISH consumption in Poland amounted to 5kg per person, ranking whitefish as the most commonly consumed wild fish in the country (37% of the total consumption of all fish and seafood). In total, the whitefish market in Poland is 183,000 metric tonnes of live weight annually.

Whitefish is the largest species category of MSC certified products in terms of sales volume and it is foreseen to account for more than 2/3 of certified sales volume in 2024. According to the assumptions, overall penetration of MSC labeled products in Poland reaches 5-10% of the whole whitefish market in Poland.

Over the past five years in Poland, there has been a steady growth in the MSC whitefish products. In 2023/24 it achieved 18,776 metric tonnes. The rate of growth decreased slightly in 2022/23 due to the conflict in Ukraine and high inflation. The high seafood prices in combination with increasing costs of living led to a drop in consumption. However, in 2023/24 the growth of 1,000 metric tonnes has been achieved. Further growth is expected as almost 200 (SKU) new whitefish products were registered last year in Poland.

Despite the huge variety of whitefish species available in MSC Programme, MSC whitefish market in Poland continues to be homogeneous. Market is dominated by pollock (64%), then cod (25%), saithe (7%) and halibut (2%). The remaining 2% belong to: hake, hoki and haddock, which continue to have a great potential to grow as their fisheries have long standing stable positions in the MSC Program.

The majority of MSC whitefish products in Poland are frozen (56%), both plain and prepared products,

like fish fingers and fish fillet. The significant share of the market are also chilled products (20%), which are gaining importance year by year. The emerging categories are pet food (13%) and retail food to go (7%). The other categories (4%) are: foodservice, canned, baby food, fish counters and supplements. Fresh fish counters have great potential to grow with Kaufland offering cod from fish counters at 12 sites.

For brands, the unquestionable leader continues to be FRoSTA, which has made the commitment of 100% MSC labelled products already in 2014. Second biggest brand of MSC whitefish in Poland is Abramczyk, which has seen significant increases in volumes and numbers of products in the last two years and still has potential to grow. Mars – the main pet food brand – has significant share and emerging number of products.

Among retailers, Lidl is undeniable leader in MSC labelled whitefish products in Lidl's own brands, exceeding the volumes of other leading retailers in Poland few times. In 2021 Lidl has led a successful MSC campaign dedicated to whitefish products. Kaufland is gaining the significance each year in whitefish products as well and shows the initiative in active communication about sustainable fishing and MSC among consumers. This led Kaufland to receive MSC Marketing Champion Award in 2023. Another retailer with large share in the MSC whitefish market is ALDI, despite its relatively small range in comparison to other discount retailers in Poland.

Biedronka, the retail chain with the largest share of the Polish market, has great potential to improve in terms of sustainable MSC whitefish products. However, it lags far behind chains such as Lidl and Kaufland. ●



Market Data: Polish whitefish

Championing Sustainable Whitefish in Poland: FRoSTA



FRoSTA in Poland committed to using only 100% MSC-certified products already in 2014 and is a leader in promoting and educating about sustainability. FRoSTA actively communicates its MSC commitment through various channels of communication contributing to both the improvement of fish stocks status and to the increase in awareness among consumers. This has made FRoSTA unquestionable leader in MSC labelled products in the 10 years history of MSC in Poland.

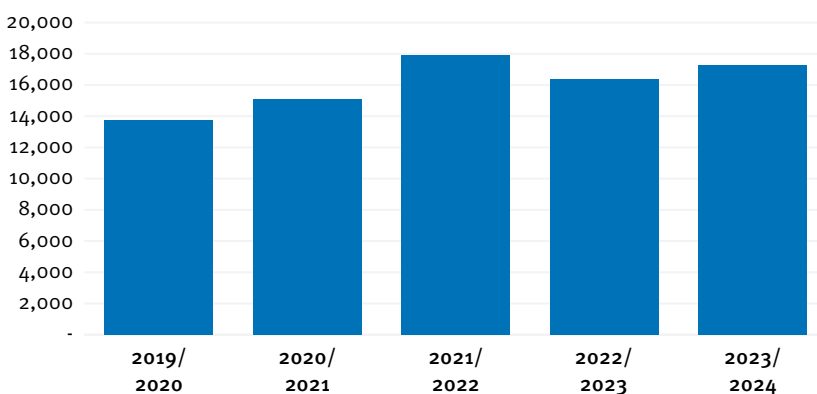
“We are convinced that only by working together can we ensure the future of our seas and oceans. Working with the MSC is an honor and a commitment for us. Together we are creating a more sustainable white fish supply chain and continuing to improve our sourcing solutions.”

Aleksandra Wysocka, Marketing Director Poland & CEE FRoSTA

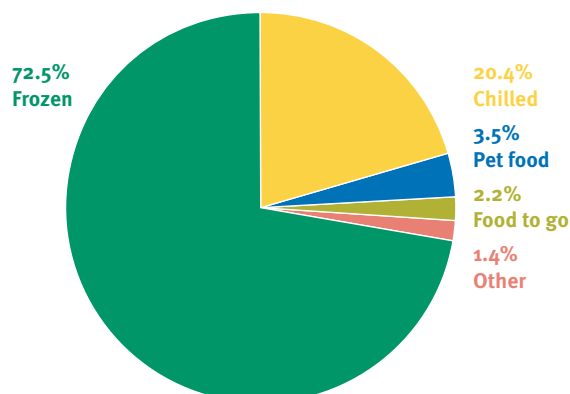
193
new active MSC whitefish products in last 12 months

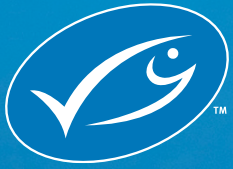
99
CoC in Poland with whitefish in scope

Volume of MSC labeled whitefish products in Poland in 2019-2024 in metric tons



Percentage of MSC labelled whitefish products in Poland by categories





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