

WHITEFISH MARKET ANALYSIS 2026: POLAND



POLAND MARKET ANALYSIS

ACCORDING TO THE NEWEST DATA¹ TOTAL WHITEFISH CONSUMPTION in Poland amounted to 5.47 kg per person, accounting for approximately 39% of the total consumption of all fish and seafood. In total, the whitefish market in Poland amounted to approximately 205,000 tonnes in live weight annually.

Whitefish is the largest species category of MSC-certified products in the Polish market in terms of sales volume and it accounts for 58% of certified sales volume in 2025. According to the assumptions, overall penetration of MSC labelled products in Poland reaches over 9% 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 2024/25 it achieved approx. 17k tons and in 2025/26 it has increased by 9.6% to almost 19k tons. The high seafood prices in combination with increasing costs of living led to a drop of seafood consumption. Further growth is expected with more than 340 MSC whitefish products available in Poland.

Despite the huge variety of whitefish **species** available in the MSC Program, the MSC whitefish market in Poland continues to be homogeneous for many years. The MSC whitefish market is dominated by pollock (64%), then mixed whitefish (18%), cod (9%) and saithe (6%). The remaining species are: halibut, hoki, hake, sole, haddock, sole and redfish 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 (67% in 2025/26 – increase from 49% in 2025), both plain and prepared products, like fish fingers, fish fillet. The significant share of the market are also chilled products, however we have observed a decrease from 36% in 2024/25 to 15% this year. The growing category is also Pet Food from 5.6% last year to 7% in 2025/26.

In the **Polish retail market**, **Kaufland** and **ALDI** recorded continued growth in the category, further increasing their share of MSC-labelled whitefish volumes. **Kaufland** saw the strongest increase, with volumes up 32% compared with the previous year, while ALDI recorded 12% growth. Lidl remains the largest retailer of MSC labelled own brand whitefish products by volume, with volumes still several times higher than those reported by other leading retailers. However, its volume decreased by 29% compared with last year.

When it comes to **brands**, the undisputed leader continues to be **FROSTA**, which committed to having 100% MSC-labelled products back in 2014. The second-largest MSC whitefish brand in Poland is **Abramczyk**, followed by **Seacon** in third place. It is worth noting that one of the biggest growth in volume has been made by **Family Fish**, brand owned by **Nord Capital** with a whopping increase of 71% year to year.

¹. Rynek Ryb stan i perspektywy, nr 36, listopad 2025



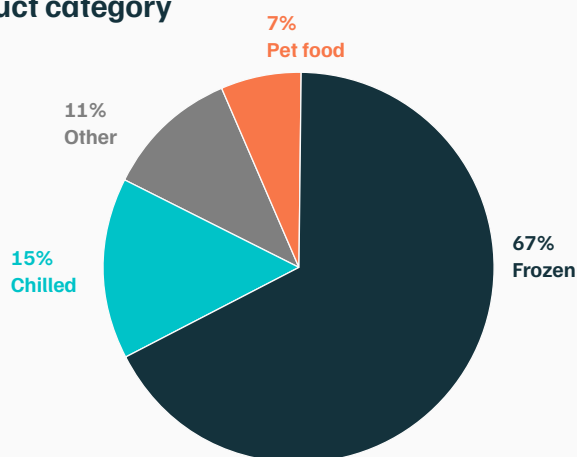
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Championing Sustainable Whitefish: FRoSTA.

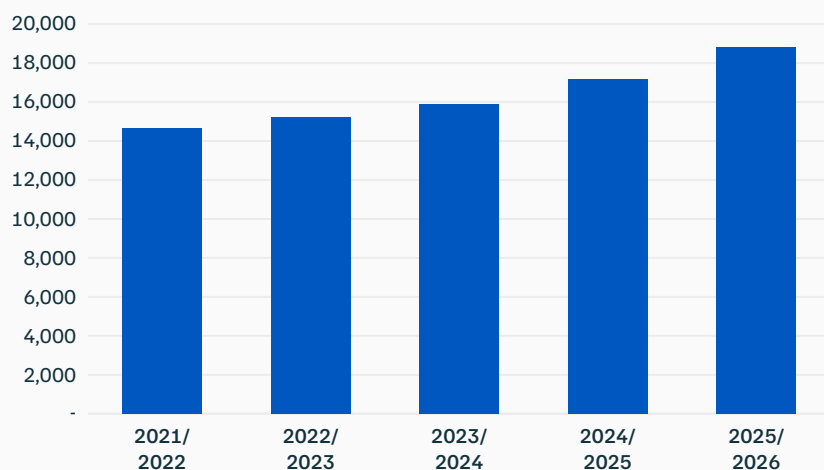


FRoSTA remains the clear leader in MSC-certified whitefish in Poland, with the highest sales volumes among all brands. The company has been committed to 100% MSC-certified fish since 2014 and offers a broad range of whitefish products, including fish fillets and portions, fish fingers and other breaded products, mainly based on Alaska pollock and cod. With its strong market position and extensive product range, FRoSTA plays an important role making MSC-certified whitefish widely available to Polish consumers.

Volume of MSC labelled whitefish sold in Poland by product category



MSC labelled whitefish - Poland



Find out more

<https://msc.org/pl/biale-ryby>

Contact us

info@msc.org



@MSCPolska



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