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# Whitefish Market Analysis 2025: Poland

# Market Analysis: Polish whitefish

IN 2023, TOTAL WHITEFISH CONSUMPTION in Poland amounted to 5,6 kg 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 211,280MT of live weight annually. Whitefish is the largest species category of MSC-certified products in the Polish market in terms of sales volume and accounts for more than 64% of certified sales volume in 2024. According to the assumptions, overall penetration of MSC labeled products in Poland reaches almost 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 approx. 19k tons and in 2024/25 it has increased by 5% to almost 20k tons. The rate of growth decreased slightly in 2022/23 as a result of the war in Ukraine and high inflation. The high seafood prices, along with increasing costs of living, led to a drop in seafood consumption. However, since 2023/24 till now, the growth of 1k tons has been achieved. Further growth is expected as over 200 (SKU) new MSC whitefish products were registered last year in Poland.

Despite the huge variety of whitefish species available in MSC Program, MSC whitefish market in Poland continues to be homogeneous for many years. MSC whitefish market is dominated by pollock (56%), then mixed whitefish (18%), cod (14%) and saithe (6%). The remaining species are: flounder, rockfish, hake, hoki, 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 (49 % in 2025- decrease from 56% in 2024), both plain and prepared products. A significant share

of the market is chilled products, growing from 20% in 2024 to 36% this year. Emerging categories pet food, retail food to go, and surimi are gaining importance year by year. Fresh fish counters still have great potential to grow. For now, Kaufland offers cod from fish counters.

When it comes to brands, the unquestionable leader continues to be FRoSTA, which made the commitment of 100% MSC labelled products in 2014. Second biggest brand of MSC whitefish in Poland is Abramczyk, which has noted significant increase in volumes and numbers of products in the last two years and still has huge potential to grow (45% growth in volume just last year).

Abramczyk is not only a producer under its own brand but also the key supplier MSC-certified whitefish for leading retailers' own brands. Additionally, Abramczyk is developing its portfolio of MSC-certified products in own brands, contributing to the significant growth of MSC products in the whole region of Central Europe.

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. In 2021, Lidl led a successful MSC campaign dedicated to whitefish products. Kaufland and ALDI are gaining significance each year in whitefish products, both retailers noted significant growth in volume since last year (Kaufland- by 80% and ALDI by 40%).

Biedronka, being the retail chain with the largest share of the Polish market, has great potential to improve its portfolio in terms of sustainable MSC whitefish products. However, at the moment, it lags far behind chains such as Lidl, ALDI and Kaufland, noting 30% decrease in volume last year. ●





# Market Data: Polish whitefish

## Championing Sustainable Whitefish in Poland: FRoSTA

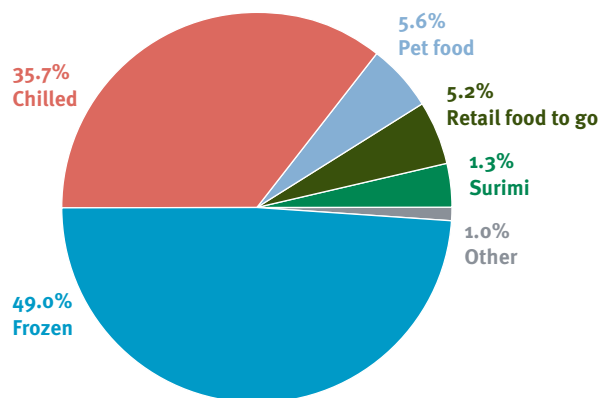


FRoSTA in Poland committed to using only 100% MSC-certified products in 2014 and is a leader in promoting and educating about sustainability. They actively communicate MSC commitment through various channels of communication, contributing to the improvement of fish stocks and increased awareness among consumers. This has made FRoSTA the clear leader in MSC-labelled products over the last 10 years in Poland, winning the MSC Grand Prix award in 2023 and MSC Top Brand in 2024.

“There is no way around sustainability. Only sustainably caught white fish will allow us to move on with the core of our business: serving valuable fish meals, both now and for future generations. Nevertheless, we always strive to improve the status quo and there are still plenty of things to do even better.”

Felix Ahlers, Chairman of the Management Board FROSTA AG

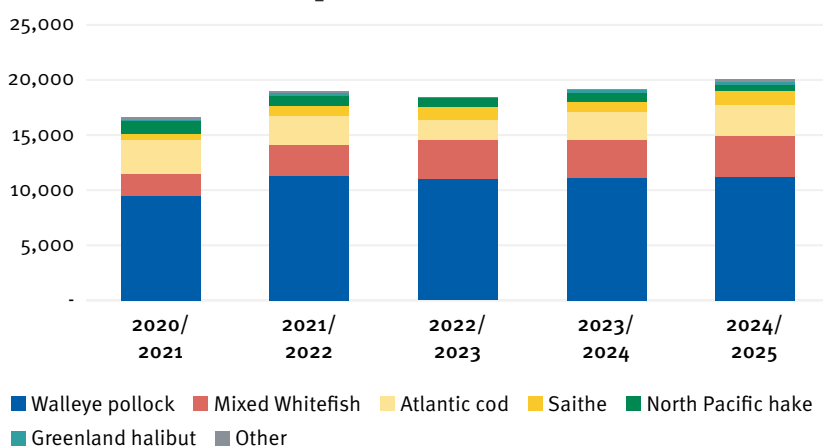
## Percentage of MSC labelled whitefish products in Poland by categories



**71**  
new active MSC whitefish products in last 12 months

**56**  
new MSC whitefish products in 2025

## MSC labelled whitefish sold in Poland by volume (metric tonnes) and species



**152**  
CoC in Poland with whitefish in scope





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All data in this report is correct as of 30 June 2025 unless otherwise stated. Forecast data included in 2024/2025.  
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