



Marine
Stewardship
Council

SMALL PELAGICS MARKET ANALYSIS 2026: POLAND



POLISH MARKET OVERVIEW: SMALL PELAGIC FISH & MSC CERTIFICATION

IN 2024, THE AVERAGE CONSUMPTION of small pelagic fish in Poland reached 4.09 kg per person, making it the second most consumed wild fish category. These species accounted for 29% of total seafood consumption, with the market size reaching 155 tons 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 150-300 tons in 2022-2024, compared to nearly 200,000 tons in previous years. Similarly, central Baltic herring (ICES 25-29, 32) catches have fallen to 75,000 tons from 300,000 tons.²

The Baltic sprat situation is also concerning. In 2023, total catches reached 266,000 tons, a 10% decline from the previous year and 50% below 1997's peak. However, for 2026, the TAC for Polish sprat fishery is set

at 176-230,5k tons (+36% year-on-year due to healthy condition of the sprat)

Decline in MSC-Certified Products since 2019 and improvement in recent year

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 71 SKU (please note that it is still increase by 51% compared with previous year) 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, is just about to be introduced 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 C herring retail market in Czech Republic (3,890 tons) surpasses Poland's (just under 2,698 tons), Poland Market was 12,000 tons only four years ago. However, growth is expected, with 40 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 Polish fisheries participating in MSC Improvement Program.

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. It is worth noticing that Lidl's volumes since last year has grown by over 80% on Polish small pelagic market and it is undisputable leader with wide offer of products.

Largest producers in volumes in Poland are Lisner, being leader in the market and noticing growth of 109% compared with last year, followed by Seko, Mirko (with whooping growth of over 1500%) and Przetwórstwo Rybne Łosoś.

Whole volume of MSC small pelagic on Polish market is 4300 tones and all of it is available in just two

categories: chilled prepared and canned.

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 critical 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 *Runek Ryb nr 36, Tabela 16*

² *Wiadomości Rybackie, WR 9-10 (267), s. 11-12*

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-szprotka>

More about herring in MSC program:



Find out more:

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

Contact us:

info@msc.org



@MSCPolska



/marine-stewardship-council

All images copyright of the MSC unless otherwise stated. Cover: Getty Images.

Registered Charity number: 1066806.
Registered Company number: 3322023.

© Marine Stewardship Council 2026.

