



European Maritime and Fisheries Fund (EMFF)

Poland

Poland – overview

Coast, lakes and ports

Poland, situated in central Europe and bordering the Baltic Sea to its north, has a lake density of about 0.9 % and a coastline of 775 km (including the Szczecin and Vistula lagoons), accounting for 0.74 % of the total EU coastline. Roughly half the landings from 2004 to 2011 were in Kołobrzeg and Władysławowo. Some 90 % of all landings were handled by 10 (of 69) fishing ports and shelters: Kołobrzeg, Władysławowo, Hel, Ustka, Darłowo, Gdynia, Dziwnów, Świnoujście, Łeba and Jastarnia.

Potential

Although the fisheries sector represents a minor part of the Polish gross domestic product (GDP), it nevertheless plays an important role in some regions, and impacts diversification in local communities, particularly in rural areas.

In 2014, the Polish fishing fleet caught 171 400 tonnes: the fleet comprised 873 fishing vessels with a combined gross tonnage of 34 034 GT, an engine power of 81 538 kW and an average age of 28 years.

The aquaculture sector produced a total of 37 600 tonnes in 2013, mainly carp (about half of the production) and trout (about 40 % of the production).

Inland fisheries brought in a total of 2 689 tonnes in 2014, mainly bream, pike and roach.

The fish processing industry in Poland is strong, and is still developing. Although the volume of production was 410 600 tonnes in 2012, it is estimated that it could reach at least 1 million tonnes. The fish processing industry is expected to grow, and exports and investment will be key factors in its development. In 2012, as in previous years, a key driver of growth in the sector was the foreign trade of raw materials and final products. Imports played a principal role in the supply of raw materials, because of the limited ability to harvest fish from the Baltic Sea, and limited aquaculture production. Therefore, increasing Polish producers' participation in the domestic fish supply is crucial.



The average yearly fish consumption is about 12 kg per inhabitant; this is significantly less than the EU average of 23.1 kg per inhabitant.

Economic performance and employment

The Polish marine fisheries sector has 1 406 full-time equivalent (FTE) employees, the aquaculture sector 4 400 FTE employees, inland fisheries 2 039 FTE employees and fish processing 15 088 FTE employees.

Poland's Operational Programme









Budget

Total (EU + national)
€710 509 513

EU contribution
€531 219 456
(including technical assistance
of €31 873 167)

The Operational Programme (OP) covers the six 'Union Priorities' defined in the EMFF, namely:

-  promoting environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based **fisheries**;
-  fostering environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based **aquaculture**;
-  implementation of the **Common Fisheries Policy (CFP)**;
-  increasing **employment and territorial cohesion**;
-  fostering **marketing and processing**;
-  implementation of the **Integrated Maritime Policy (IMP)**.



1. Fisheries

What?

The Polish fleet can be classified into two general groups: the Baltic Sea fleet (with 870 fishing vessels, a combined tonnage of 16 783 GT and engine power of 66 947 kW); and the long-distance sea fleet (with 3 fishing vessels, a combined tonnage of 17 251 GT and engine power of 14 591 kW). This fleet operates mainly in areas managed by the North East Atlantic Fisheries Commission (NEAFC), in the North Sea area and in Norwegian waters; in 2014 they operated in waters under the jurisdiction of Mauritania, Angola and Guinea.

The main species caught by Polish fishermen in the Baltic Sea include cod, sprat, herring, salmon, sea trout and flatfish. Polish long-distance sea vessels fish primarily for cod, saithe, redfish, halibut, mackerel and horse mackerel (in 2014, these catches totalled about 52 000 tonnes). The vast majority of Polish fishing vessels target different species (both pelagic species (sprat and herring) and cod, depending on their needs).

In 2013, there were 702 fishing enterprises, with the vast majority (90%) owning a single vessel. Only 9% of the enterprises owned between two and five fishing vessels.

OP aim

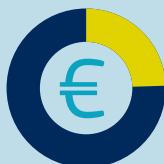
The Polish programme focuses on maintaining equilibrium between fishing capacity and available fishing opportunities, making innovative use of unwanted catches, enhancing the competitiveness of enterprises, and improving fishing port, auction or landing site infrastructures. Moreover, measures for protecting and restoring marine biodiversity and boosting technological development will also receive support.

Key result

Sustainable exploitation of fisheries, and increased sector profitability with sustained employment.

Budget

EMFF: €130 175 502
(24.5% of the total EMFF PL OP allocation)
National: €60 625 326



2. Aquaculture

What?

The Polish aquaculture sector produced a total of 37 600 tonnes in 2013, mainly carp (about half of production) and trout (about 40% of production), but also African and European catfish, tilapia, grass carp, silver carp, crucian carp, pike, tench and sturgeon. The total value from production amounted to EUR 122 million and, altogether, 4 400 FTEs were employed in the same year. Although more than half of production was based on the traditional pond method (ponds were estimated at 60 000 ha of usable area), new growing techniques — such as recirculating systems — are being developed (the production level in 2013 amounted to 2 300 tonnes).

OP aim

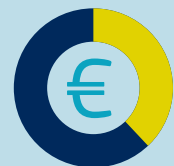
The EMFF supports the implementation of the Polish multiannual aquaculture strategy (from 2014 to 2020). The main objective is to promote aquaculture (conventional methods and recirculation systems) and the farming of salmonids and other species (eel, pikeperch, sturgeon, catfish and turbot) with significant market potential, and to increase the share of species other than carp in aquaculture overall. There is considerable emphasis on aquaculture providing environmental services.

Key objective

Significant production growth, from 37 600 tonnes in 2013 to 51 600 tonnes by 2023 (including growth from 2 300 tonnes to 6 000 tonnes from recirculation systems), and contributing to sustainable employment and environmental protection.

Budget

EMFF: €201 740 451
(38% of the total EMFF PL OP allocation)
National: €67 246 817



3. Common Fisheries Policy (CFP)

What?

Data collection and control are significant aspects of CFP implemen-



tation. Reliable data on fish stocks and effective control of fishing activities are necessary to provide a solid foundation for responsible and sustainable fisheries management.

OP aim

The Polish programme supports the implementation of the national programme for 2014 to 2016, and the future post-2016 period, covering the data collection of commercial and recreational fisheries, aquaculture and industries processing fisheries products. Regarding fisheries control, the main focus will be on modernisation, development and the purchase of technologies linked to fisheries data, surveillance and product traceability. Training and exchange programmes are also planned.

Key result

Ensure 100 % fulfilment of the data transmission obligation, and improved effectiveness of fisheries control.

Budget

EMFF: €23 627 339

(4 % of the total EMFF PL OP allocation)

National: €6 197 486



4. Community-led local development (CLLD) strategies



What?

Poland has planned the selection of 25 fisheries local action groups (FLAGs) to improve fishermen's lives in those local communities dependent on fisheries and aquaculture, as set out in the strategies developed by these FLAGs. Although the 2014-2020 period saw a significant reduction in number of FLAGs (down from 48 under the EFF), CLLD will, nevertheless, still play a significant role in those coastal areas and regions highly dependent on aquaculture. Most of the local strategies will be financed by the EMFF. However, Poland plans to implement a multi-funded approach, meaning that other ESI funds will also cover other elements.

OP aim

The Polish EMFF programme aims to develop fishing and aquaculture areas by creating new jobs and developing alternative sources of income for fishers and other fishing industry-related branches of the economy, including encouraging entrepreneurship in young people.

Key result

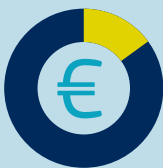
Creation of businesses (110) and new jobs (375 FTEs), plus job retention (375 FTEs).

Budget

EMFF: €79 699 995

(15 % of the total EMFF PL OP allocation)

National: €14 064 705



5. Marketing and processing



What?

The Polish fish-processing industry has the capacity to generate profit for its workers. In 2012, the Polish fish-processing industry comprised 257 fish processing companies. For 196 of these, it was their primary

production, while for the remaining companies, fisheries was a second, complementary activity, with a total of 15 088 FTEs (67 % were women) and a total turnover of EUR 1.93 billion. The production volume amounted to 410 600 tonnes. Prepared and preserved fish had a share of 48.6 % of total production, smoked fish 20.4 %, frozen fish, filets and fish meat 16.9 %, fresh or chilled fish, filets and fish meat 5.5 %, salted fish 4.6 % and other inedible fish products 3.9 %. Exports of fish and fish products amounted to 230 000 tonnes, with a value of EUR 1.04 billion.

In terms of the number of employees, the Polish processing industry, where fish production is the main activity, is dominated by small and micro-sized firms. In 2012, the largest number of plants (39 % of the total) employed between 11 and 49 persons, then 28 % of plants less than or equal to 10 persons, 25 % between 50 and 249, and 8 % employed 250 people or more. However, it was highly concentrated, and most of the production (57.3 % of the volume and 72.8 % of the value) was concentrated in 16 large fish processing companies with more than 250 employees.

OP aim

The Polish EMFF programme aims at increasing the sector's competitiveness through more effective use of resources and raw materials, innovative use of waste and discards, and supporting the market, by building a distribution chain and improving the quality of products. Moreover, the EMFF supports the creation of a producers' organisation in the aquaculture sector, and the development of production and marketing plans by all existing producers' organisations.

Key result

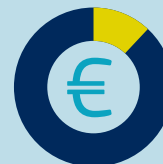
Improved market organisation, increased competitiveness and better awareness of customers, in order to stimulate fish consumption.

Budget

EMFF: €61 603 002

(12 % of the total EMFF PL OP allocation)

National: €19 698 000



6. Integrated Maritime Policy (IMP)



What?

The IMP seeks to provide a more coherent approach to maritime issues. The Marine Strategy Framework Directive (MSFD) (Directive 2008/56/EC), as the environmental pillar of the IMP, is the key component of the EU's policy for healthy, clean and productive seas. The objective of the MSFD is to achieve good environmental status by 2020.

OP aim

The EMFF supports the implementation of the common information sharing environment (CISE) and promotes the protection of marine environments as well as increased knowledge on the state of marine environments.

Key result

Achievement of good environmental status through the development and implementation of the MSFD and creation of an effective system of marine management.

Budget

EMFF: €2 500 000

(0.5 % of the total EMFF PL OP allocation)

National: €833 334



Simplification

Reducing the administrative burden by simplifying documentation and minimising the number of attachments accompanying applications, and promoting the use of the advance payment system by beneficiaries.



Success stories

A new method of water purification/Axis 4

Innovative biological method based on instilling into water selected species of bacteria that absorb and process organic substances in rivers, lakes and mine excavations, while ensuring environmental protection.

EFF: PLN 114 069 (€26 175)

Total cost of the project: PLN 256 772 (€58 920)

Improved quality of fish caught and improved safety/Axis 1

Complex modernisation of a fishing vessel, resulting in improved quality of fish caught, storage of live fish in seawater tanks, and improved navigation safety for fishers on board the fishing vessel.

EFF: PLN 439 253 (€100 792)

Total cost of the project: PLN 1 492 310 (€342 430)

Pilot project of complex carp processing system/Axis 3

The aim of the operation was to improve the processing technologies currently available on the market by developing a universal, waste-free system of preparing carp as a modern marketable food from one site, and recuperating meat from fish-bones for fodder from the other site.

EFF: PLN 2 592 143 (€594 801)

Total cost of the project: PLN 3 456 190 (€793 038)

New storage facility and production capacity/Axis 2

As a result of investment in new storage facilities and production equipment, the yearly production of frozen fish products increased by 9 000 tonnes, and processed food increased by 70 tonnes. Moreover, 25 extra people were employed.

EFF: PLN 4 271 793 (€980 219)

Total cost of the project: PLN 9 797 484 (€2 248 161)

Complex modernisation of trout aquaculture/Axis 2

Reconstruction of existing trout aquaculture by building new reinforced concrete ponds, with a unique technology that reuses and purifies water. Additionally, specialised transportation was purchased, allowing for delivery of fresh fish to customers.

EFF: PLN 5 793 739 (€1 329 449)

Total cost of the project: PLN 15 031 449 (€3 449 162)

More information

● [European Commission Fisheries](#)

● [National multiannual aquaculture plan](#)

● [European Maritime and Fisheries Fund](#)