Polish seafood and aquaculture

Market opportunities for cooperation

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Agenda:

• Poland – brief introduction
• Fish market
• Aquaculture development in Poland
• Towards innovation-based economy: Important changes and strategic goals in the new financial perspective 2015-2020
• European Maritime and Fisheries Fund
• Demand for innovation
• Fields of cooperation
Poland - one of the fastest growing economies in EU

- Population 38.6 million
- One of the most attractive locations for FDI
- 20% GDP growth last 6 years
- Growing middle class purchasing power and growth of private consumption
- Poland remains the biggest recipient of EU Structural Funds
Polens BNP økte med 3,6 procent i 2015

Økonomien akselererte hovedsakelig takket være industrien (en økning med 5,4 % sammenlignet med 4 % i 2014)

Forbruket i husholdningene (en økning på 3,1 % mot 2,6 % i 2014)

Økt handel (en økning på 3,1 % sammenlignet med et fall på 0,6 % i 2014)

Lavere dynamikk i investoringsutgifter: økning med 6,1 % sammenlignet med 9,8 % i 2014

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Towards innovation-based economy

• Science and technology parks - an important element in the Polish innovation landscape. Special Economic Zones (tax benefits and additional benefits: financial and expert support, accommodation and most advanced infrastructure including laboratories)

• Poland is a hub for outsourcing – the leading sector in terms of the popularity of foreign investors.

• Poland has received a sizeable sum of over € 82,5 billion financial support. (EU, Regional Development, Structural Funds and Cohesion Fund)

• Development of R&D and innovation in local markets, designed especially to support local leaders of innovation

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The largest market for Norwegian Seafood in 2015

Export: 6.9 billion NOK, 194 thousand tons
Approx. 40% consumed on domestic market

Polish fish processing industry annual income
(bln euro)

- Other incomes (fish trade)
- Production sold in Poland
- Production for export
Fish market in Poland

Domestic consumption — 13 kg per capita a year = 490 000 tons a year (live weight equivalent)

Processing industry in Poland – demand for imported fish raw material aprox. 800 000 tons (live weight equivalent)

Good image of farmed and freshwater fish among Polish consumers

Significant growth in sales of fresh fish

New generation of Poles changing the market habits (sushi restaurants, single portion, ready meals)
Poland important link between Norwegian fish suppliers and European seafood VAP consumers

- Position on the EU market
- No barriers in trade
- Strong market position in Germany (salmon / herring)
- Growing position in CEE, Italy, France, UK
- Established links with several retailers

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Status of Polish aquaculture

- 40 000 tons of annual fish production + 4 tons of caviar
- Goslawice farm - European leader in sturgeon and catfish breeding
- 100% production in fresh water (new Jurassic Salmon as an exception)
- The most popular species: carp (C. carpio) and trout (O. mykiss)
- Other species: ca. 5 000 tons a year (pike, pike-perch)
- RAS and cage farm based on warm water (sturgeon, catfish, tilapia, eel)
- Salmonids (trout, atlantic salmon, arctic char)
Innovations

Jurassic Salmon:
Photos (by Fish Industry Magazine)

First Polish Atlantic salmon farm, an investment is co-financed by EU, with a value of 13 million Euro, realized by the Polish company “Jurassic Salmon Ltd.”

Production target: 1000 tons of Atlantic salmon. The use of innovative technology with saline geothermal waters for rearing and farming of salmon.
European Maritime and Fisheries Fund

Total allocations for Poland, amounting to 710 million EUR until 2020.

The priority areas: support for sustainable, innovative and competitive aquaculture.

Establishment of new aquaculture businesses and development of existing fish farming

Training and development of professional competence related to the aquaculture

„Green energy” in aquaculture. Water recirculation and water-environmental services

Fish health and welfare
Seafood multi-disciplinary science
Processing /Resource Management

• Biotechnology in food processing

• New, healthier processing methods, elimination of chemicals (hydrogen peroxide, chlorine etc.)

• Listeria prevention in seafood plants

• Innovative packaging solution for fresh fish and seafood industry

• Parasite prevention program (e.g. Baltic cod)

• Utilisation of catches in connection with fish “discard” ban

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Innovation needed
Aquaculture

• Probiotic feed
• Introduction of triploids (eg. Rainbow trout x alpine trout)
• Fish breeding, incubation year-round
• Reducing environmental impact: lagoons (bio filters), microsite
• Water recirculation (degassing, aeration, nitrification, denitrification)
• Hydraulic transport of fish within the breeding and processing plants
Demand for innovation

Aquaculture

Consulting and services for sustainable development of aquaculture:

• Designing of freshwater RAS
• Support for the certification (ASC, GlobalGAP)
• Management and monitoring in fish farms
• Staff training (senior and middle management)
• Study tours to modern centers of aquaculture systems (RAS)
• Renewable Energy Engineering - windmills, photovoltaic cells, recuperation
Demand for innovation

Aquaculture:

• Genetics and biotechnology
  • roe / stocking material of selected lines of salmonids (rainbow trout, brown trout, alpine trout), whitefish, pike-perch
  • fish lines resistant to diseases of salmonid fish (VHS, ISA)
  • techniques of trophloidation
  • EM (effective microorganisms) in water purifying
  • EM in increasing digestibility of fish feed and in immunostimulation
  • reproductive biotechnology
Demand for innovation

Aquaculture

Fish health and welfare:

- transfer of know-how in the field of specific and nonspecific immunoprophylaxis
- prebiotics and probiotics in fish feeds
- advances in the treatment and prophylaxis of diseases of salmonid fish (bacterial, viral, fungal)
- technology and pharmaceutics for fish stress reducing (welfare)
- slaughter techniques - mechanical, electrical
- research on quality of fish raw material
Fields of cooperation

• Company network - business partners in Poland (farmers / processors)
• The possibility of investment in RAS with 50% public funding
• Study tours, seminars, trainings
• Participation in joint projects, innovation and implementation
• Postgraduate studies
• Clusters