

POLAND

SUPPLY AND CONSUMPTION

The local market in Poland is estimated by the Post to be approximately 500 tons for 1991, and is comprised of Scandinavian farmed salmon; Russian pink from Kamtschatka; and Canadian Pacific (20 tons). The retail price for smoked salmon on the local market is \$10-15 US per kilogram, depending on the season and origin. Salmon is viewed as a luxury food in contrast to beef at \$4 US per kilogram; pork at \$5 per kilogram; cooked ham at \$7 per kilogram; and other fish species like carp (\$3 per kilogram) and perch (\$5 per kilogram). There are dozens of local seafood importers which are no longer under government control. Imports of salmon from Russia is a recent development, but species obtained from these regions are considered inferior to Canadian salmon products. Most of the market is made up of locally smoked salmon or imported product, with only limited amounts of fresh available during the season on the Baltic.

TARIFFS

All restrictions on the importation of salmon products to Poland, except tariffs, were lifted two years ago. The import duties are: fresh 5 percent; frozen 10 percent; smoked 15 percent; and fillets 10 percent.

HEALTH REGULATIONS

No local health regulations apply to imported salmon other than the veterinary certificate required by Canadian exporters.

POST PROPOSALS

The post believes the local market for salmon products will remain somewhat limited based on competition from lower priced pork and ham. Polish average income is only \$250 US per month and consumers view salmon as an expensive luxury product. However, Canadian salmon exporters may be able to penetrate the market by targeting the high-end deli and restaurant sectors. Properly organized promotional endeavours aimed at hotel/restaurant sector of the economy could increase Canadian exports of salmon products to the Polish market.