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POLICY

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Poland

Post: Warsaw

2017 Fish and Seafood Market in Poland

Report Categories:

Fishery Products

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Report Highlights:

Poland's 2017 total estimated catch was 196,900 metric tons (MT), including fish from the Baltic Sea and long-distance, deep-sea fishing. Despite an increase in its deep-sea catch, Poland's total 2017 catch decreased by one percent from 2016, due a lower catch from the Baltic Sea. The Polish fish processing industry is the fourth largest in Europe, with 263 processing plants which ship product throughout the EU. Several hundred smaller, often family-run companies also sell products only within the immediate regional. 2017 fish consumption in Poland averaged about 12.4 kilograms per capita, almost half of the EU average. 2016 fish and seafood imports exceeded \$2.0 billion, of which \$64 million were U.S. origin. Poland imports mainly raw fish for further processing by the local processing industry.

General Information:

Production

Fishing Sector

Poland's total 2017 fish catch decreased by one percent from 2016 and totaled 196,900 MT. The 2017 Baltic Sea catch was 130,000 MT, a six-percent decrease from 2016. The main species caught in the Baltic Sea were European sprat (68,000 MT) and Atlantic herring (38,300 MT). In 2017, the long-distance, deep-sea catch was estimated at 66,900 MT, a 12-percent increase over 2016.

Poland's primary deep-sea fishing areas were the Southeastern and Northeastern Atlantic.

Table 1: Fish Catch (MT)

	2013	2014	2015	2016	2017*
Total	195,482	170,516	187,037	198,877	196,900
Baltic Sea	134,083	118,464	134,725	138,898	130,000
Total catch in long-distance fisheries:	61,398	51,638	52,312	59,980	66,900
• Northeast Atlantic	7,261	6,379	6,398	6,264	n/a
• Northeastern & Central Atlantic	54,137	19,935	4,496	30,488	n/a
• Southeast Atlantic	0	25,324	41,418	20,337	n/a
• Southeast Pacific	0	0	0	2,891	n/a

Source: 2017 Statistical Yearbook of Fishery

*FAS Warsaw estimate

Processing

The Polish fish processing industry is the fourth largest in Europe and supplies EU markets with processed products, including smoked fish (salmon and trout), canned fish (herring, mackerel, and sprat) and ready-to-eat fish products (salads and marinated fish). Other products include fresh and frozen cod fillets, ready-to-prepare frozen fish fillets (breaded fillets), freshwater and diadromous fish (pike-perch), and fresh and frozen whole fish (trout, sprat). In 2017, the overall output of the Polish fish processing industry was 525,000 MT, valued at PLN 10.8 billion (\$3.2 billion). Currently, 263 processing plants are eligible to export to the EU. Several hundred additional smaller and often family-run companies sell products to regional markets. In 2017, the fish processing industry employed approximately about 12,000 people.

Table 2: Output of Fish Processing Industry (000MT)

	2012	2013	2014	2015	2016	2017*
Production of fish		466.2	447.8	468.9	515.8	
• Fresh and frozen fish	423.2	83.3	65.1	51.2	51.5	525.0
• Fresh and frozen fillets		52.2	60.2	68.5	101.3	
• Salted fish	60.0	19.6	19.1	19.9	18.6	53.0
• Smoked fish		89.9	82.5	91.5	97.9	
	46.9					107.5
	19.7					20.0
	85.1					92.0

Processed or tinned fish		208.9	207.6	225.2	234.0	239.0
• Tinned fish and preserves	199.3	68.8	69.9	77.9	83.9	88.0
• Pickled fish		87.1	88.5	92.0	86.2	86.0
• Culinary and delicatessen products	67.3	53.0	49.2	55.3	63.9	65.0
	87.1					
	44.9					
Processed fish by species						
• Salmon			6.8	8.8	11.6	n/a
• Herring	8.7	14.1	106.2	112.6	114.9	
• Sardines and sprats				14.2	14.0	
• Mackerel	106.0	105.5	12.2	12.2	15.7	
• Tuna				0.3	0.2	
	12.6	13.6	10.8			
	9.8	9.6	0.3			
	0.5	0.1				

Source: Institute of Rural Economics, Fish Market, October 2017

*Estimate

Aquaculture Sector

Polish aquaculture consists of land-based freshwater farms in traditional earth ponds. Production is based on two or three-year cycles. In 2017, Polish aquaculture production reached upwards of 38,000 MT, a one-percent increase over 2016. Carp was the biggest aquaculture species in 2017 with almost 18,000 MT of production, about half of total output. Carp farming is carried out in traditional ponds on land-based farms. Poland has about 70,000 hectares of registered carp ponds, the largest in Europe.

Trout farming in Poland began during the end of 1990s. 2017 rainbow trout production was 16,500 MT, a level which has stagnated in recent years. Trout is intensively farmed in modern production facilities. Fish are harvested when they reach about 200-450g. Trout farms are located in the along the Baltic Sea coast and in the Carpathian foothills in southern Poland.

Consumption

In 2017, fish consumption in Poland amounted was 12.4 kg/per capita, about half of the EU consumption average. 2017 fish consumption decreased by five percent from 2016, mainly due to lower herring and salmon consumption, which was caused by competition from cheaper pork and poultry meat. Herring, pollock, and mackerel are the most popular saltwater species, while carp, trout, and basa are the most popular freshwater species. Pollock is the most widely consumed fish in Poland due to its relatively low price. Despite growing imports of cheaper and low-quality Russian pollock, Polish consumers are increasingly more informed and quality-conscious regarding fish products. Poland's growing demand for high-quality fish and seafood offers opportunities for U.S. suppliers. Since 2004, the Fish Market Development Association, a non-governmental organization, has worked to develop the fish market and increase seafood consumption. The Association organizes promotional campaigns (mainly in electronic and social media), training activities, and conferences including the Fish Congress,

which is Poland's largest national meeting of the fish processing, aquaculture, and fishery sectors.

Table 3: Annual Consumption of Fish in Poland (Kilograms of life weight/capita)

	2013	2014	2015	2016	2017*
Total Fish and Seafood	12.2	13.4	12.5	13.1	12.4
• Pollock	2.7	2.9	2.9	2.7	2.7
• Herrings	2.0	2.1	2.3	2.7	2.5
• Mackerel	0.9	0.8	0.9	0.8	0.8
• Cod	0.8	1.4	1.1	1.1	1.1
• Basa (Panga)	0.8	0.6	0.5	0.5	0.4
• Sprat	0.7	0.9	0.4	0.8	0.7
• Salmon	0.7	1.3	1.1	0.9	0.8
• Carp	0.5	0.6	0.5	0.6	0.6
• Tuna	0.5	0.4	0.5	0.6	0.5
• Hake	0.4	0.3	0.4	0.4	0.4
• Other	1.0	0.8	0.5	0.5	0.4

Source: Institute of Rural Economic, Fish Market, October 2017.

*estimate

Distribution

Seafood is sold in stores ranging from specialized stores, supermarkets, and hypermarkets, to small independent grocers. Supermarkets and hypermarkets offer the most dedicated shelf space and broader selections of processed seafood products. Many hypermarkets also feature extensive fresh seafood products including tanks for live fish. Small, independent grocers typically lack this option, but instead offer processed, frozen branded, and frequently with non-branded, generic fillets. Carp is the most traditionally served during the Christmas in Poland.

Trade

Imports

In 2016, Poland imported 501,338 MT of fish and seafood valued at over \$2.0 billion, a 16-percent increase (in value) over 2015. Norway was Poland's main fish supplier. Other significant shippers include Sweden, Denmark, Germany, China, Russia, and the United States. Poland is one of the biggest salmon importers in the world, supplied from Norway, Sweden, and the United States. In 2016, Poland imported salmon, mackerel, cod, and haddock from Norway, cod from Denmark and Russia, and mackerel from the Netherlands. During the first nine months of 2017, import volumes increased by one percent over the same period of 2016. In value terms, imports increased by seven percent because of higher import prices.

Table 4: Value of Imports of Fish and Seafood Products to Poland (\$000)

Partner Country	2014	2015	2016	2017 (Jan-Aug)	% Change (Jan- Aug) 2017/2016
World	2,058,196	1,778,779	2,059,581	1,543,415	7
Norway	907,986	748,846	972,228	686,370	3

Sweden	146,973	135,675	141,506	126,803	18
Denmark	114,092	120,645	135,735	101,656	2
Germany	147,691	114,549	107,445	87,185	12
China	122,274	112,526	106,464	76,762	1
Russia	59,917	61,066	72,071	68,803	24
United States	48,818	55,490	64,406	34,993	- 17
Iceland	45,730	44,448	49,567	39,418	26
United Kingdom	92,771	38,719	49,500	28,811	- 14
Chile	48,624	38,084	42,837	35,248	10

Source: Global Trade Atlas

Poland imports mainly raw fish, which is used by the local processing industry for value addition. Imports of salmon depend mainly on export markets for processed salmon products. In 2016, higher prices reduced domestic salmon consumption and imports therefore declined. Herring imports increased due to higher domestic consumption.

Table 5: Volume of Imports of Fish and Seafood Products to Poland (000 MT)

	2015	2016	2017*	Jan-June		
				2016	2017	2018**
Live fish	4.7	5.6	5.5	1.5	1.5	1.6
Fish, fresh or chilled excl. fillets	176.1	176.2	165.0	81.8	74.3	80.0
Fish, frozen, excl. fillets	87.7	104.0	111.0	52.7	58.4	55.0
Fish, fillets	182.9	199.9	190.0	93.4	85.7	90.0
Fish, dried, salted, smoked or in brine	3.0	2.5	2.8	0.9	1.1	1.0
Crustaceans, live, fresh, chilled, frozen, dried	9.9	7.5	7.6	3.9	3.8	4.0
Processed fish and caviar	48.5	45.4	47.0	20.7	22.0	23.0
Total	533.3	569.1	561.7	267.1	262.7	269.3

Source: Institute of Rural Economics

*Estimate, ** forecast

Table 6: Volume of Imports of Fish and Seafood Products to Poland by Species (000 MT)

HS Code		2014	2015	2016	Jan-Sep 2017	Jan-Sep 2017/16
	Total	498,839	501,338	506,477	362,506	0.88
030214	Atlantic Salmon Fresh or Chilled	108,225	118,858	114,676	83,167	5.53
030475	Alaska Pollock Fillets, Frozen	36,444	36,728	36,683	26,207	7.78
030354	Mackerel, Frozen	36,707	37,106	33,463	27,283	15.47
030499	Fish Meat, Frozen, Except Steaks and Fillets	36,679	29,485	33,281	17,385	-21.9
030486	Herring Fillets, Frozen	22,312	24,777	32,173	15,963	-25.28
030363	Cod, Frozen	20,915	19,702	23,080	18,541	5.39
160412	Herrings (Prep. or Pres. Whole or in Pieces)	28,250	29,325	21,038	16,138	8.88
030479	Fish Fillet Fam Bregmaceroditae, etc.	12,182	14,136	16,121	9,850	-6.92

	Frozen					
030213	Pacific Salmon, Fresh Or Chilled	16,244	16,905	15,562	9,083	-21.33
030481	Pacific, Atlantic Salmon Fillets Frozen	10,719	10,749	10,777	6,188	-23.69
030251	Cod, Fresh or Chilled	15,339	15,421	10,500	14,806	58.92
030211	Trout (Salmo Trutta) Fresh, Chilled	8,258	9,940	10,467	6,481	-18.24
030489	Fish Fillets, Frozen	4,979	7,663	9,853	8,975	32.69
030351	Herrings, Frozen, Exc. Fillets, Livers & Roes	8,330	7,743	9,790	7,831	7.64
160414	Tunas/Skipjack/Bonito Prep/Pres not Minced	7,589	9,198	9,439	5,480	-22.33
030471	Cod Fillets, Frozen	10,217	8,951	8,209	6,423	-6.55
030441	Pacific, Atlantic Salmon Fillet Fresh/Chilled	14,133	7,866	8,041	4,732	-22.09

Source: Global Trade Atlas

In 2016, fish and seafood imports from the United States totaled \$64.4 million, a 16-percent increase over 2015. During the first nine months of 2017, fish and seafood imports from the United States (value terms) decreased by 17 percent in comparison to the first three quarters of 2016. This decrease is mainly due to a sharp reduction in Alaskan pollock imports. Although pollock imports are growing due to higher demand, during the first nine months of 2017 saw the value of U.S. imports decrease by 26 percent due to strong competition from Russia.

Table 7: Value of Imports of Fish and Seafood Products from the United States (\$000)

HS Code		2014	2015	2016	Jan-Sep 2017	Jan-Sep 2017/2016
	Total	48,818	55,490	64,406	57,402	-16.52
030475	Alaska Pollock Fillets, Frozen	22,175	23,406	27,304	21,807	-22.22
030311	Sockeye Salmon, excl. Fillet, Livers & Roes, Frozen	1,850	166	13,760	22,003	843.73
030481	Pacific, Atlantic and Danube Salmon Fillets Frozen	16,645	23,049	13,262	2,737	-90.4
030494	Alaska Pollock, Frozen, except Fillets	5,483	7,149	7,594	6,377	-21.68
030495	Fish Of Families Bregmacerotidae etc, Frozen Nesoi	380	1,199	1,470	3,448	172.4
030313	Atlantic Salmon, Frozen	1,245	0	380	553	654.82
030363	Cod, Frozen	0	0	269	244	120.41
030622	Lobsters, Live, Fresh, Ch, Dried, Salted or in Brine	28	26	160	51	-57.78
030367	Alaska Pollock, Frozen	0	79	52	41	-8.82
160411	Salmon, Prepared or Preserved, Whole or Pieces	88	2	33	2	-95.24
030721	Scallops Incl. Queen Scallops, Live, Fresh, Chilled	16	121	31	40	11.86
160432	Caviar Substitutes Prepared From Fish Eggs	0	0	14	5	-41.52

Source: Global Trade Atlas

Table 8: Value of Imports of Pollock (\$000)

	Jan - Sept	Change (%)
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	2015	2016	2017	2017/2016
World	62,354	60,041	60,688	1
China	32,007	30,264	28,481	- 6
United States	16,723	21,353	15,857	- 26
Russia	4,077	1,540	9,689	529
Germany	9,469	6,748	6,449	- 4
United Kingdom	0	130	110	- 15

Source: Global Trade Atlas

Exports

In 2016, Polish exports of fish and seafood products were \$1.9 billion, a 13-percent increase in over the previous year. Major destinations of Polish exports of fish were Germany (smoked salmon, herring, cod, trout), France (smoked salmon, fish fillets), United Kingdom (prepared fish, cod), Denmark, Romania (herring), Italy, and Vietnam. In the first nine months of 2017 exports increased by 11 percent because of higher sales to France and United Kingdom.

Table 9: Value of Exports of Fish and Seafood Products (\$000)

	2014	2015	2016	Jan-Sep 2017	Jan-Sep 2017/2016
World	1,946,215	1,699,255	1,899,250	1,501,198	11.18
Germany	1,085,759	940,712	1,032,442	788,500	6.77
France	169,170	145,044	145,699	126,473	21.85
United Kingdom	138,374	103,942	110,102	94,369	15.44
Italy	88,351	81,247	107,720	74,054	4.55
Denmark	98,792	96,599	98,081	77,972	10.15
Belgium	34,354	22,938	40,977	37,075	33.02
Czech Republic	40,460	33,137	37,231	32,935	20.48
United States	35,141	30,050	36,713	32,750	31.75
Sweden	23,036	26,526	33,038	32,786	56.16
Vietnam	36,799	32,720	29,210	26,193	14.40
Romania	25,086	24,868	25,168	20,803	19.56
Netherlands	24,478	19,385	23,508	18,118	4.19

Source: Global Trade Atlas

In 2016, Polish exports of fish and seafood products to the United States amounted to \$36.7 million, a 23-percent increase over 2015. The increase of exports to the United States stemmed from higher sales of herrings, smoked salmon and sardines. In the first nine months of 2017, exports to the United States increased by 25 percent because of higher sales of herrings.

Table 10: Value of Exports of Fish and Seafood Products to the United States (\$000)

		2014	2015	2016	Jan-Sep 2017	Jan-Sep 2017/2016
	Total	35,141	30,050	36,713	44,604	25.12
160413	Sardines/Sardinella/Brisling Prep/Pres, not Minced	9,260	4,459	11,303	9,274	-22.67
160412	Herrings Prep or Pres, whole or in Pieces	11,547	7,326	8,763	9,357	46.04
030541	Pacific and Atlantic Salmon	8,009	5,742	7,839	8,372	10.02
030489	Fish Fillets, Frozen	2,058	3,303	2,852	3,699	33.26
030481	Pacific, Atlantic Fillets Frozen	1,442	5,655	2,739	5,525	40.73
030471	Cod Fillets, Frozen	1,393	2,011	781	400	-70.73

160415	Mackerel, Prepared or Preserved, not Minced	352	389	637	780	42.06
160420	Fish, Prepared or Preserved	833	924	621	700	26.29

Source: *Global Trade Atlas*

Current Tariffs for Seafood Products

Tariffs for seafood products exported to the EU range from zero to 22 percent depending on species, level of processing, and the time of year. Detailed information on seafood tariffs can be found in the official EU Journal.

Market Access

A health certificate issued by a government-approved veterinarian from the exporting country must accompany all fish shipments to Poland. Products packed for retail sale also must bear a label in the Polish language with the date of production clearly stated. Exporters should also check with Polish importers regarding standards.

For guidelines regarding seafood exports to Poland and the EU in general, information is available from the National Oceanic and Atmospheric Association, [NOAA](#).

Market Entry Strategy

Trade missions coordinated through industry/export organizations as well as participation in trade shows such as the annual European Seafood Exposition in Brussels are important in gaining knowledge about the market structure, consumer preferences and building contacts with importers. Poland has its own tradeshow, POLFISH, held biannually in Gdansk on the Baltic Sea in Northern Poland. The next POLFISH trade show is scheduled for May 2019.

In order to identify importers or find a partner for promotion program U.S. exporters may focus at the following three organizations:

I. Polish Association of Fish Processors

The Polish Association of Fish Processors (PAFP) was established in 1998. It is a national organization of companies operating in the field of fish processing. It has 60 members. The main goal of the association is to unite the trade environment as well as present and protect the businesses of incorporated companies as well as promote fresh and processed fish consumption. The Association also represents the fish processing industry within the European Union.

Contact:

Polskie Stowarzyszenie Przetwórców Ryb

Address: Slowianska 5, 75 - 846 Koszalin

Phone/fax: (+48 94) 347 13 28

Cell.: (+48) 606 30 72 38 or (+48) 600 456 585

www.pspr.pl

E-mail: pspr@pspr.pl

II. Fish Importers Association (*Stowarzyszenie Importerow Ryb (SIR)*)

SIR is a non-profit organization founded in 2003. Their objectives are to represent the business interests of the members, support the fish market development in Poland, promote healthy aspects of seafood consumption and propagate high ethics standards in business.

Contact:

Address: Celna 1/117

70-644 Szczecin, Poland

Phone: (+48 91) 462-33-92

Fax: (+48 91) 462-49-02

E-mail: info@sir.org.pl

http://sir.org.pl/index_e.php

Members of SIR:

ABRAMCZYK SP. Z O.O., BYDGOSZCZ - full range of seafood products - import, processing, distribution, export (www.abramczyk.pl)

APOL SP. Z O.O., ŚWINOUJŚCIE - frozen fish, mainly white fish fillets - import, wholesale (apolzuk@uznam.net.pl)

CANADA TRADING SP. Z O.O., SZCZECIN - frozen fish, mainly pelagic for further processing - import, wholesale (biuro@canadatrading.com.pl)

CASTELMAR SP. Z O.O., GDYNIA - full range of seafood products, import distribution, wholesale (www.castelmar.pl)

CHŁODNIA SZCZECIŃSKA SP. Z O.O., SZCZECIN - cold storage services of seafood products (www.chlodniaszczecinska.pl)

CSL INTERNATIONALE SPEDITION SP. Z O.O., SZCZECIN - maritime & inland forwarding plus clearance of goods at border point (www.csl.com.pl)

DNHS POLAND SP. Z O.O., SZCZECIN - full range of seafood products & meat and fruits - import, wholesale (www.dnhs.pl)

ESPERSEN POLSKA SP. Z O.O. KOSZALIN - processing of fish, mainly cod - import, production, export (www.espersen.pl)

EUROFISH SP. Z O.O., SZCZECIN - full range of seafood products - distribution, import, wholesale (www.eurofish.pl)

FROSALFISH MAREK KAWKA, SZCZECIN - frozen fish, mainly pelagic for further processing - import, wholesale (www.frosalfish.pl)

IMPEXRYB SP. J., SZCZECIN - full range of seafood products - import, wholesale (impexryb@dialcom.com.pl)

INTER MARINE SP. Z O.O., GDYNIA - full range of seafood products, import, export, wholesale (www.intermarinegroup.com)

INTERSEA SP. J. SZCZECIN, GNIEZNO - frozen fish - processing, packing, import, wholesale (intersea@unet.pl)

J.P. KLAUSEN POLSKA SP. Z O.O. SZCZECIN - full range of seafood products - international trading (www.jpklausen.com)

KOŁOBRZESKA GRUPA PRODUCENTÓW RYB Sp. z o.o. KOŁOBRZEG - Baltic fish, logistics,

storage, ice factory (www.kgpr.pl)

LODOM SP. Z O.O., SZCZECIN - cold storage services of seafood products (www.lodom.com.pl)

LUXFISH SP. J., SZCZECIN - full range of seafood products - import, wholesale
(www.luxfish.pl)

MARE FOODS SP. Z O.O., GOLENIÓW - full range of seafood products - import, wholesale
(www.marefoods.pl)

MOREX SP. Z O.O., GDAŃSK - full range of seafood products - import, wholesale, export
(www.morex.pl)

PANTRADE SP. Z O.O., WARSZAWA - full range of seafood products, import, wholesale
(www.pantrade.com.pl)

PESCANOVA POLSKA SP. Z O.O., SZCZECIN - full range of seafood products - import, distribution, wholesale
(www.pescanova.pl)

POLSEAFOOD SP. Z O.O., SZCZECIN - frozen fish mainly pelagic - import, wholesale
(www.polseafood.pl)

CENTRUM LOGISTYCZNE GRYF SP. Z O.O., SZCZECIN - cold storage services of seafood products
(www.chlodniagryf.pl)

SEAMOR INTERNATIONAL SP. Z O.O., SZCZECIN - full range of seafood products - import, processing, distribution, wholesale
(www.seamor.com.pl)

TRIMARAN SP. Z O.O. S.K.A., SZCZECIN - full range of seafood products, import, export, wholesale
(urszula@trimaran.com.pl)

UNIFOOD SP. J., SZCZECIN - frozen fish, mainly white fish fillets & HG- import, wholesale
(www.unifood.pl)

P.W. WALDI I SP. Z O.O. SK, KOŚCIAN - frozen seafood – import, wholesale, distribution
(www.pwwaldi.com.pl)

III. Fish Market Development Association (Stowarzyszenie Rozwoju Rynku Rybnego – SRRR)

The Fish Market Development Association is a non-governmental organization operating since 2004, gathering enterprises from the fish sector, industry associations of the fish sector and technology suppliers for the fishing industry and individuals, working on the development of the fish market and increasing consumption of fish products. The Association organizes campaigns promoting fish consumption (mainly in electronic media, including social media) and organizing training and conferences including the largest national meeting of the fish processing, aquaculture and fisheries sector: Fish Congress attended by over 300 participants.

President: Tomasz Kulikowski

Address: Hutnicza 34, 81-061 Gdynia

Phone: (+48) 501 623 816

Fax: (+48 58) 620 37 98

E-mail: biuro@srrr.org.pl

<http://srrr.org.pl>

Trade Shows and Contacts:

European Seafood Exposition, Brussels, Belgium

April 24-26, 2018

<https://www.seafoodexpo.com/global/>

POLFISH Trade Show, Gdansk, Poland

May 29-31, 2019

<http://www.polfishfair.pl/>

U.S. seafood exporters may also obtain a list of current importers by contacting the Office of Agricultural Affairs of the U.S. Embassy in Warsaw. For more information concerning market entry and a current importer list contact:

Office of Agricultural Affairs, Warsaw, Poland

Embassy of the United States of America

Piotr Rucinski or Jolanta Figurska

E-mail: Piotr.rucinski@fas.usda.gov; Jolanta.Figurska@fas.usda.gov

Phone: (48-22) 504 2349 or (48-22) 504 2324