

CATCH-UP

Spring 2025

FEATURING THIS SEASON'S MARKET REPORT,
OUR FISH BUYERS' PICKS AND A ROUND-UP OF
FISHY INDUSTRY NEWS



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UK shoppers backing sustainable fish despite cost of living

Source (full article): fishfocus.co.uk

Spending on certified sustainable seafood hit a record-breaking £1.5 billion in the UK and Ireland last year (2023/24).

Spending on certified sustainable seafood hit a record-breaking £1.5 billion in the UK and Ireland last year (2023/24), despite the ongoing impacts of the cost of living crisis. This growth in purchasing marks a 12% increase from the previous year, according to a new report published today.



New FIP project for brown crab in the eastern central north sea

Source (full article): fishfocus.co.uk

A pioneering Fisheries Improvement Project (FIP) in the Eastern Central North Sea (ECNS) launched in December 2024 thanks to efforts from the catching and processing sectors.

The ECNS FIP seeks to improve the management of the brown crab fishery, mostly comprising of UK, Irish and Polish brown crab vivier vessels. A pre assessment and action plan against MSC Version 3 have been completed by Poseidon Aquatic Resource Management Consultants and can be found on the FIP's webpage that is kindly being hosted by SAGB. AC Marine Consultants Ltd have been appointed as the FIP project manager.

Eat local fish: nutrients "lost" to exports could help health and climate

Source (full article): fishfocus.co.uk

Scientists who have calculated the UK's "lost" nutrients from fish exports for the first time are calling for a big push to get more people eating local seafood.

Research by the Rowett Institute, which the University of Aberdeen has published in Nature Food, found oily fish caught and farmed in UK waters could provide 73% of the daily recommended intake of Omega-3 and 46% of Vitamin B12.

BUYER RECOMMENDS...

Good picks this season include:

- Skrei Cod (until end of April)
- Superfrozen Tuna
- Monkfish
- Meagre
- ChalkStream® trout

SOCIAL CATCH-UP...

[@kingfisher_brixham](https://www.instagram.com/kingfisher_brixham)

Only 1 in 5 people eating NHS recommended two portions of fish a week

Source (full article): fishfocus.co.uk

One in four consumers in the UK are eating less fish than two years ago.

Just 21% of the UK population are eating the NHS recommended two portions of fish a week despite growing concerns around maintaining a healthy diet, according to a new report published by the Marine Stewardship Council (MSC) today.



FISH MARKET REPORT Spring 2025

OVERVIEW

Welcome to the spring 2025 newsletter, which aims to cover the March to May period for the supply of fresh and frozen fish and seafood. The next three months see a number of changes in the quality and availability of a number of species. Flat fish will start to come out of their spawning seasons, whilst mussels and native oysters will go into theirs. Haddock will start to spawn, and we will eagerly await the new season for lobsters – both Canadian and native – with both seasons dependent on weather conditions warming. This is never an easy season for our buyers to confidently recommend species to use throughout. However, as always, we have some ideas for you!

Of course recommending reliable and cost effective species to use on your menus in this forthcoming season is more important than ever. The impending increases in national living wage and national insurance contributions will have significant effects throughout our industry. Further to this, general inflation remains above the Government's target, and expectations are that this may drift upwards through the year, to around 2.75% year on year by the second half of 2025. The Institute of Grocery Distribution (IGD) have forecast food and drink prices across foodservice and retail to rise from 2.3 to 4.3% over 2025, with a mid-case average of 3.4%. The impact of inflation and the significant changes announced in the budget are, unfortunately, unavoidable. Our costs to serve our customers are increasing. Our teams are working very hard to mitigate them through operational and cost efficiencies; however, the scale of their impact is such that we are not able to absorb them fully. Like many businesses in the same position, we have no option other than to pass on some of these costs to customers. We are managing these increases alongside your forthcoming product price reviews.

Throughout, and despite these challenges, we have continued to invest in improving service to you – be that via new machinery in our depots, improved technology in our sales processes, or our maintenance of your service levels (delivery days and order lead times). As ever, your account manager will be on hand to help you identify any opportunities to mitigate the impact of this increase, as well looking at potential product switch opportunities to maximise value from your range. There is also the potential to discuss changes in your agreements with us (such as longevity of terms), and leveraging these to avoid the full effect of the increases. We fully understand that all business are experiencing similar cost pressures, which is why we have sought to mitigate as much as we can through efficiencies and changes within our own organisation. Please always be assured of our commitment to put great service at the heart of what we do, and to continue to not only help you manage costs, create efficiencies and save money, but also to help you grow.

So whilst, as an industry, there is a huge amount of well-documented trepidation about these forthcoming changes, we also need to feel positive that we are about to go into one of our busier periods for trade. Warmer weather, blue skies, and lighter evenings should start to drive customers into pubs and restaurants with greater frequency than we traditionally see in January and February. Consumer data is showing that healthy eating is becoming a priority again. This shift is driven by heightened health concerns, environmental awareness, and ethical considerations. With fish and seafood being an important part of a healthy, well-balanced diet, entice your customers by promoting as a good source of protein and vitamins, and a primary dietary source of heart-healthy omega-3 fatty acids. Add our range of certified and responsibly sourced species, and there is the perfect combination of reasons to put fish on your spring menus to attract more customers.

Natalie Hudd, Director of Sales, Direct Seafoods.

FARMED FISH

| Species | Comments |
|--------------------------------------|--|
| Sea Bass & Gilthead Bream | Our two main suppliers have indicated that sea bass price increases are on the agenda. Sea bass and gilthead bream suffered high mortalities last summer because of a rise in sea temperatures in Turkey. Biomass levels are especially low on the two smaller sizes (300g-400g/400g-600g). Frozen prices are also on the rise as a result. There are new generation fish growing so the situation should begin to improve from the end of May. Furthermore, the biomass for 600-800g and larger sizes is better, so increases are less severe on these gradings. Fortunately, as yields have improved, the effect on fillet prices is less acute than on whole fish. Following challenging conditions in the farming of gilthead bream last year, the biomass level on this species is better, so prices and availability should be more stable. |
| Salmon | Salmon prices saw a sharp (and predictable) upturn in January. This has levelled out somewhat since. The positive news is that a combination of factors have reduced the number of production grade fish significantly this year. These factors include the implementation of a new vaccine, an improved sea lice treatment, and a reduction in jellyfish invasions, which created major issues with biomass levels last year. Furthermore, the water temperatures have been higher this year, so fish have been more active feeding. This increases the levels at which farmers will harvest due to increased growth. However, following conversations with some of the key salmon farmers in our supply chain, it is anticipated that we will see a rise in costs going into March. This will accelerate into April as we approach Easter in the middle of the month. The demand that this creates will see farmers influencing prices by reducing harvests. During May, there are 3 bank holidays in Norway, which will decrease availability further. In the event that the increase in demand does not materialise, producers will begin to freeze fish rather than allow prices to fall further. For all of these reasons, we do expect increases, but tentatively suggest that they will not be to the levels of the prior 3 years. We anticipate that fish should become more cost effective as we head into June. |
| Trout | Following some operational challenges in recent years, one of the major rainbow trout producers have announced that they are closing at the end of March. The price increases that they have implemented in the interim, combined with the reduced volume available once operations cease, mean that we are estimating increases in small rainbow trout prices over the next 3 months. ChalkStream® trout should be unaffected by this, so we are broadly estimating stable prices and availability throughout spring and into August when prices will be reviewed again. A perfect choice for a spring or summer menu, and a great alternative to salmon. Sea reared trout prices will follow salmon pricing to some degree, but should be a more economical option. Like ChalkStream®, trout that is sea reared in Scotland or Norway is a first rate alternative to salmon given their similar flavour and texture profiles. |
| Halibut | Farmed halibut prices are expected to be stable throughout the spring season. The larger 3-5kg size continues to be expensive, but yields are good and this is a fish that always stands out as premium on your menu. Global GAP certified fish attract a Marine Conservation Society (MCS) rating of 2. All wild fish are MCS red rated to avoid, and are listed as "near threatened" on the International Union for the Conservation of Nature (IUCN) list of threatened species. This species is large, slow growing, and long-lived, but has been subject to historical decline due to over-fishing. Icelandic biomass declined by 85% over 35 years, and stocks are expected to remain low. With farmed fish providing a great alternative, it is surprising how frequently wild fish are still sought out. Try promoting the farmed fish to your customers, with the story likely to resonate with a younger and more sustainability focussed clientele. |

FARMED FISH contd

| Species | Comments |
|-----------------------------|---|
| Other Farmed Species | Meagre should be a reliable choice over the spring season. This fish is extremely efficient at converting food into muscle (FCR or feed conversion ratio) so they grow quickly and to a good size. With the commercial wild bass fishing ban in place throughout February and March, meagre is a great substitute. Add to this the MCS 2 rating for ASC or Global GAP certified fish (which our fish are!), and this is a good choice for the spring season. Biomass has lowered a little for the smaller size of farmed turbot, and this has raised the cost. All other sizes are expected to be stable in forthcoming months. |

WILD FISH

| Species | Comments |
|--------------------|---|
| Flat Fish | Lemon soles will be higher priced from the south coast, but other origins will bring the average price down. We expect prices to lower a little during the spring period. There is variance around the UK coastline as to the spawning seasons, but there should be fish consistently available, and this will continue to improve into the summer months. Whole plaice have been making higher prices during their current breeding season and resulting yields are poor on fillets. We do expect that landings will improve on the south coast in April as fish start to come back to best quality. However, we may have to wait until May for yields to approve. Expect prices to remain firm. Like plaice, megrim soles are also spawning. We anticipate that quality will improve in May. One to avoid for now. Witch soles, like lemon soles, have variable seasons depending on origin. Cornish fish reproduce between April and July, so one to take advantage of in March. The season is later further north. Witch soles and megrims are both cost effective alternatives to more premium flatfish, so should be considered as a more economical choice for your menus when at best quality. Dover sole prices remain consistently firm and this is driven by export markets. These will now not be at their best until May when they start to move offshore, but the quality will go hand in hand with higher prices. Turbot will be in their reproductive phase now, so choose farmed fish as the best alternative. Brill spawn for a shorter period, so availability and quality should start to improve in April. |
| White Fish | Easter is 3 weeks later this year, so we should see large cod prices at lower price levels during March, rising slightly again in April and towards the Easter weekend and into May. Smaller cod fillets are a different story. Landings have been poor, and there is strong demand from the frozen market. This means that prices have been high and this is expected to continue. Similarly, there is demand pressure on the smaller sizes of haddock. The haddock spawning season will start in March, and this will lower fillet yields and increase prices. Coley is a much more reliable choice during the spring period as they do not present the same spawning issues. However, as coley is caught with other white fish, there may be less availability in southern ports. The lower price point of coley will help to mitigate the increases likely on species that are more popular. One to consider. Skrei are a migratory cod that undertake a long and rigorous swim from the Arctic to the northern coast of Norway at this time of year. The fish are extremely lean when they enter the Norwegian fishing grounds to spawn. This gives them their unique texture and flavour. They are reported to have the highest nutritional value of all cod. Skrei is in season until the end of April, so make the most of it until this time. Hake continues to see highly unpredictable catch levels week to week. It probably holds the position as the most volatile wild species in terms of price and availability. Some of the extortionate prices we see at auction are a result of its incredible popularity. A gill netted species, this fishing method is not appropriate for strong tidal flows. This is why we see such variable availability during spring tides. |
| Round Fish | Monkfish prices have eased back somewhat. A versatile and tasty fish, these will be a good choice for the spring with prices expected to lower a little more. This is a great fish to recommend to your customers who would typically choose meat as a main course. Monkfish competes well as it has a non-fishy, meaty texture. The classic dish of monkfish wrapped in Parma ham is always a winner. Gurnard are a winter fish and the sustainability rating remains poor for most varieties due to a lack of data. As we move into the spring, we recommend only using occasionally on menus, as the spawning season is April to August. We should start to see mackerel back in our coastal waters in late spring. Price and availability should start to improve in May. Sardines and herrings should be available mostly from the Devon and Cornish pelagic fisheries. April sees them peak in quality before they come inshore to spawn later in spring and summer. Both options are economically priced and make great additions to the specials board. |
| Cephalopods | An MCS 5 rating continues to apply to the vast majority of native squid. There is a lack of data on stocks, but the MCS are concerned about fishing pressure. This means that it remains as one to avoid for those of you who adhere to the ratings system as a guide for your menu choices. There are MSC certified alternatives available, which we can help you with if you talk to your account manager. Pot caught cuttlefish from the English Channel and Celtic Seas are rated a 4. All trawled cuttlefish is rated a 5. For this reason, we would recommend asking for the 4 rated fish on the occasional special through spring. The MCS continue to advise that octopus sustainability needs significant improvement and recommend avoiding all octopus caught in British waters due to a lack of information on populations and no controls on fishing. We do have MSC certified octopus tentacles as an alternative. |
| Exotics | Ramadan this year is from Friday the 28th of February to Sunday the 30th of March. This will reduce fishing effort in key swordfish and tuna fishing regions, so reduced supply and increased prices are expected. Availability should improve thereafter, particularly when the Chilean swordfish season commences in May. Talk to your account manager about our sushi and sashimi appropriate tuna options. With the popularity of this genre continuing to grow amongst all demographics, and the accompanying MCS 3 rating, this is a great choice for the spring. |
| Shellfish | Canadian lobsters are currently from pounded stocks whilst we wait for the new season to begin. Prices will remain high until fishing commences in earnest. The spring season typically peaks April to June, but the date is often determined by the weather – with any excessively cold conditions in March sometimes delaying the start. Prices are currently very high following Chinese New Year, and we do not expect easing in the short term. Native lobster availability is governed by how warm our UK waters are. Typically we expect to see availability increase in line with fishing of their Canadian counterparts improving. Landings of USA roeless scallops are significantly down on prior year, with sizes also being much smaller than historically. This is already affecting container prices. Expect further increases. Our UK scallops start to spawn in the warmer months, so you may find that the quality is not so good in the latter part of spring, although prices should be reasonably stable. Native oysters are out of season from May onwards, but pacific rock oysters will be available and offer a good alternative. Mussels will also enter their spawning season so should be avoided from May onwards. We try our best to find the best quality mussels by moving our sourcing around different farms during this difficult time. However, we strongly recommend that you do not put them on the menu during late spring and summer, as they tend to be much weaker and lesser quality. With the forthcoming increases to wages, it should be pointed out that the processing of crabmeat is a labour intensive process. This means that we will have increases to all crabmeat lines during the spring. Add this to the downgraded MCS rating due to declining stocks, and there has not been much positivity for the species. However, we are pleased to see that a Fisheries Improvement Project (FIP) was launched in December in the Eastern Central North Sea. Our own processor has been a significant part of this process, and we are hopeful that improvements in this area will enable you to continue listing this wonderful product on your menus. Clams are shorter in availability at the moment, and this is not expected to improve until the MSC certified pump scoop dredging season starts at the end of May. One to avoid unless you have deeper pockets! |

SMOKED, DELI & FROZEN FISH

| Species | Comments |
|--------------------------------|---|
| Smoked Fish | Smoked salmon prices will rise alongside any inflation in fresh. Smoking salmon is also a process that employs a significant amount of labour so we are fully expecting increases to be implemented in line with the rise in national living wage. That being said, smoked salmon is a staple of any spring menu, so talk to your account manager about the different variations we have on offer to see what works best for you. Smoked mackerel is on the increase. With new season mackerel prices rising as result of reduced quotas (down 20%) and strong demand, our processor has seen an almost 10% increase in whole fish costs being landed into the UK. This means that there has been a significant increase on this product. Smoked haddock should be a better choice this season as demand for the larger haddock fillets used in smoking is not as strong as for smaller sizes. Versatile on a breakfast or main menu. |
| Deli | Most of our deli lines are forecast to be stable in price through the spring. An increase in popularity of plant-based foods has seen the global seaweed market growing exponentially. We offer a variety of seaweeds including kombu, wakame and dulse. Seaweed is a great source of fibre to promote gut health, contains antioxidants to prevent or delay cell damage, and may also be helpful in reducing inflammation. Contact your account manager to talk about the range available. |
| Frozen Fish and Seafood | The impact of a weaker currency is having far-reaching effects on a number of our core frozen lines. Frozen cod, haddock, prawns, squid, scallops, and pollock are all traded in USD. The Pound Sterling slid lower in January versus the US Dollar (USD) and the Euro. The USD rate, in particular, has an impact on our frozen buying. Rates have stabilised a little since, but there is nervousness in the market. Particularly since inflation is now forecast to rise again from higher energy prices. Most of these key lines are anticipated to increase by circa 2%, with cod and haddock nearer 5% due to issues with raw material availability on the back of reduced quotas. Security in the Red Sea is gradually improving following the news that Houthi militants have pledged not to attack shipping companies. There are signs of a slow return to stability as the Suez Canal is preparing to scale up to manage global trade again. Many shipping companies are still nervous to use the route. As such, whilst this is positive news, the return to this route is likely to be a slow one. For that reason, we are not yet seeing any freight cost benefit as of yet. |

Eating Scottish caught herring and mackerel could help health and climate

Source (full article): fishfocus.co.uk

Scientists who have calculated the UK's "lost" nutrients from fish exports for the first time are calling for a big push to get more people eating local seafood.

Research by the Rowett Institute, University of Aberdeen published in Nature Food, found oily fish such as herring and mackerel caught in UK waters could provide 73% of the daily recommended intake of Omega-3 and 46% of Vitamin B12.

In the homeland of pizza, salmon is now as popular as pizza itself

Source (full article): fishfocus.co.uk

Sushi and salmon have become favourites at Italian eateries. Salmon dishes are now almost as popular as meat dishes, according to a new survey.

While pizza and pasta are synonymous with Italy for Norwegians, salmon has become synonymous with Norway for many Italians. This is because of their appetite for smoked salmon, sushi, and poke with salmon as the main ingredient.

Hooking customers with a healthy seafood message

Source (full article): fishfocus.co.uk

Industry reputation campaign Seafood for Life kicks off 2025 with a call for businesses to shout about the health benefits of fish and shellfish.

Seafood restaurants and takeaways have an exciting opportunity to attract and engage customers by highlighting the numerous health benefits of their dishes.



For species insights and menu inspiration contact your account manager.

Tax changes a threat to business growth and stability

Source (full article): fishfocus.co.uk

The recent announcement by the UK Government regarding increases in National Insurance contributions, coupled with changes to the inheritance tax, has raised serious concerns within the Scottish seafood processing sector.

In a joint statement, the Scottish Seafood Association and the Scottish Pelagic Processors' Association say these budget changes threaten to undermine the government's rhetoric about fostering economic growth across business communities and may have unintended consequences for businesses who are struggling to recover from the impact of the COVID-19 pandemic and recent high energy costs.

Recipe Corner

Looking for some seasonal menu inspiration? Take a look at these delicious recipes, which utilise one of our buyers picks for spring

Scallops with lemon and ginger
Source (full article): fishfocus.co.uk

Pan-fried turbot with soy and hazelnut gravy
Source (full article): fishfocus.co.uk

Trout gravadlax
Source (full article): fishfocus.co.uk



Please contact us with any seafood queries, and for information on daily landings, new products or assistance with menu planning.
kingfisherbrixham.co.uk