

CATCH-UP

Winter 2023

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

Something fishy is happening in schools

Source (full article): [FishFocus.co.uk](https://www.fishfocus.co.uk)
young people are cooking and eating fish and they seem to enjoy it!

During the last school term, across the UK, young people in secondary schools prepared, cooked and tasted fish – often for the first time – and they liked it! And they told us that they want to learn more and eat more fish.

Part of the Fish in Schools Hero programme, the Food Teachers Centre, supported by the Fishmongers' Company's Fisheries Charitable Trust, ran 26 student masterclasses in schools (with 520 students attending), as well as 10 secondary school teacher training sessions with 200 teachers.

Bidcorp UK businesses, Bidfood and Bidfresh awarded top MSC award

Source (full article): [FishFocus.co.uk](https://www.fishfocus.co.uk)
Bidcorp UK companies, Bidfood and the Direct Seafoods division of Bidfresh, scooped the prestigious MSC Foodservice Wholesaler of the Year award for their outstanding, all round focus on seafood sustainability.

Passionate fish experts with unrivalled industry knowledge, all Bidcorp UK business are driven by a shared desire to provide kitchens with quality fresh and frozen produce to help customers create inspired menus, with sustainability being paramount across all practices.



Fish butchery, mastering the catch, cut and craft

Source (full article): [FishFocus.co.uk](https://www.fishfocus.co.uk)
Award-winning author and culinary game-changer Josh Niland returns with the ultimate guide to the art of Fish Butchery, with expert techniques and groundbreaking recipes that are an urgent call for action on culinary sustainability.

Josh believes that when a fish arrives to market, like an animal to a butcher, there are disciplined practices that we need to follow. No butcher in the world would only strip the loins off a pig and then throw the rest away as waste. And yet essentially this is what we do every day all around the world with fish.



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BUYER RECOMMENDS...

Good picks this season include:

- Crab
- Fish Cakes
- Trout
- Meagre
- USA Scallops

SOCIAL CATCH-UP...

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

Consumers must recognise seafood's low carbon footprint, says SFF CEO

Source (full article): [FishFocus.co.uk](https://www.fishfocus.co.uk)
Consumers concerned about climate change can eat Scotland's wild-caught seafood confident in the knowledge that it has one of the lowest carbon footprints of any type of food production, the head of the country's biggest fisheries organisation said today.



Chief executive Elspeth Macdonald told guests at a dinner at Edinburgh Castle to celebrate the 50th anniversary of the Scottish Fishermen's Federation (SFF) that critics of the industry failed to recognise that the climate credentials of Scottish fish and shellfish compared very favourably to other forms of sustenance.

FISH MARKET REPORT Winter 2023

OVERVIEW

Welcome to the winter 2023 newsletter, which aims to cover the December to February period for the supply of fresh and frozen fish and seafood. As opposed to the autumn catch up, this is my LEAST favourite calendar quarter to write about as we see so much volatility in so many species and my crystal ball is not 100% reliable when trying to predict where prices are going to go! What we do know is that fishing effort will reduce as we get nearer the end of December and will not resume in full until the middle of January. We also know that salmon farmers historically put prices up during December and into January as harvest volumes reduce. Therefore, the key message would be to inform us of your wild fish requirements as far in advance of Christmas and New Year as you can, and look at alternative products to salmon for the New Year if you want to avoid price increases. Be open to the idea of using frozen lines to aid order fulfilment – particularly if we experience adverse weather. Finally - never name the species used in your fish and chips so that you can always use the best quality and most cost effective white fish that week! At least, with colder water, most species should be in their prime with only some flat fish species deteriorating as they go into their spawning seasons.

The Marine Conservation Society (MCS) have undertaken their winter ratings review, and we have some key changes to share with you from that review. Thanks to our director of sustainability, Laky Zervudachi, for detailing the changes.

Improvers

- Meagre has improved to a 2 rating for our Global GAP certified fish. The MCS were under the impression that there was not much demand for it in the UK and were going to delist from their guide until Laky pointed out just how important it is to foodservice these days. Thanks Laky!
- ASC certified farmed salmon has now improved to a 2 rating. ASC fish does fetch a premium against fish that do not carry the certification, but it is great news for customers who want to improve the amount of green rated species on their menus without having to pay the more extortionate premium carried by organic fish.
- Brill stocks seem to be improving! Inshore fisheries move to a 3 rating in the West Country, whilst otter trawled and gill netted fish in the North Sea achieve a 2 rating. Beam trawled fish do remain at a 3 in the North Sea. This great prime quality flat fish should appear on more menus.
- Coley disappointingly fell to a 4 rating last year, so it is great to see that stocks in the North Sea are growing again, and that there is increased biomass in the sea with fishing well within sustainable limits. Most fisheries are now 2 rated and will certainly be so from our local Scottish MSC fishery. A great species to highlight to chefs as a tasty value alternative to some of our other white fish species.
- Wild Bass from trawled and netted fisheries are now 3 rated, the same as line caught. There is cautious optimism regarding stock improvement down in the West Country (Scottish and French bass remain red rated). This is largely due to implemented rigorous management measures - such as catch limits and closed seasons.
- Red mullet has gone from a 5 – fish to avoid – to a 3. Despite overall fishing pressure being slightly above sustainable levels, the red mullet stock appears to be robust in the Channel and North Sea. Though there is no actual TAC (total allowable Catch) in place, there are other management plans working to help improve stock levels.

Negatives

- Pollack is now a default red 5 rating down from the previous 3 rating (not to be confused with the separate species - Alaskan pollack). Pollack was once the favourite substitute for cod, and star of many top chef's recommendations as a sustainable alternative white fish. A new recent stock assessment indicates that the stock is now below sustainable levels and zero catch is advised. As there is no precautionary recovery plan in place, this results in a critical fail for stock, so many chefs will need to delist this species for now.
- North Sea cold-water prawns are now 5 rated from specific areas. Some care will need to be taken when sourcing as those caught in FAO 27, 3a and 4a (even the MSC certified stock) will now be rated 5. The prawn population in this region is depleted, and fishing pressure is now considered above sustainable limits. There are some management plans in place to ensure that stocks are allowed to recover; but until there is relevant data to indicate that this has happened they will remain at 5 rated.
- Illex squid is now a 5 rating adding to the list of red rated squid species due to lack of appropriate management measures in place. This is Argentine shortfin squid, which is caught in international waters. Most of the squid from Chinese producers will be coming from the Chinese fishing fleet - where unregulated fishing in these waters is of significant concern. This fishery is responsible for around half of the catches of this species, and threatens the sustainability of the stock.
- Cod that is trawl caught from Iceland and Norway has been downgraded to a 3 and 4 respectively. In the case of Iceland, this is due to a lack of management plans specifically in place to reduce the by catch of redfish and wolffish which are both at historic low levels. In the case of Norway, the new rating is due to lower stock levels combined with the fact that the management plans have not reduced catch level recommendations.
- Dover soles that have been caught by beam trawls in the Irish Sea have moved from a 3 rating to an automatic 5 rating, as there is significant concern for the stock level. Fishing is taking place outside safe biological limits in spite of scientific advice that there should be zero catch. Furthermore, there are currently no management plans in place to improve the fishery.
- Plaice caught by beam and otter trawl fisheries in the Eastern Channel have been downgraded to a 5 and 4 respectively. This is due, in the main, to concern that the fishing pressure on this stock has been too high and that there is no effective management plan in place to help improve the stock level.

I think most of us in the hospitality industry will agree that we have not been seeing trade at levels that we would like in the autumn, and all are hopeful that business will pick up as we reach the all-important festive period. This does not bode well for January and February in the ongoing cost of living crisis, so watch out for our daily specials and promotions to help you weather the storm. We are working closely with our amazing suppliers to bring you ideas and solutions for your menus, so make sure you talk to your account managers about the wonderful and diverse range that we have to offer – something to suit all budgets. It only remains for us to thank you for all of your custom and loyalty this year. Wishing each and every one of you a Merry Christmas and a Happy New Year.

Natalie Hudd, Director of Sales, Direct Seafoods.

FARMED FISH

Species	Comments
Sea Bass & Gilthead Bream	Farmed sea bass sizes up to 1kg are in good supply for December. Anything over 1kg are available in smaller quantities due to winter growth being slower. Similarly, gilthead bream up to 600g are in good supply, but we are predicting higher prices for the 600g + fish due to slower winter growth. Both species represent a sensible choice over the next three months. Whilst we are expecting biomass levels to reduce in the New Year, and prices to rebound somewhat, sea bass and gilthead bream are still a good value option. The variety of gradings and preparations offer versatility as starters, main courses, or sharing plates.
Salmon	We have seen strong prices for salmon in last three months. Many processors took advantage of lower prices in August to start freezing down product. This created significant demand, and prices rallied to unexpected levels in September and October. There has been some easing since this time. However, Scottish fish remain very expensive as a result of adverse weather conditions (notably Storm Babet and Storm Ciaran) interrupting supply and limiting volumes available. Broadly speaking, we expect prices to be stable until we reach the last two weeks of December when we may start to see some increases. Sadly, this is when we enter an uncertain period for salmon, as fish are not as active due to the cooler waters. Because of these conditions, farmers usually lower harvests to keep prices high. We have seen this scenario develop to extreme levels in 2022 and early 2023, and have no reason to expect anything different in 2024. We predict increases of circa 10% in January, and potentially more in February and beyond. Exercise caution and consider using alternative species. Any significant reduction in demand for salmon will see prices lowering. If trade levels remain poor in the New Year, then the severity of the increases may be mitigated to some degree.

FARMED FISH

Species	Comments
Trout	ChalkStream® trout look to be a sound choice for the winter. Whilst fish have seen some minimal increases due to increased fuel surcharges in the supply chain as the price of oil rises, these have had an insignificant effect on the price. As one of our most loyal supplier partners, the farm have assured us of consistency of supply. This could only be compromised if there is a substantial uplift in demand for the fish (usually if too many customers turn away from salmon and use ChalkStream® as their preferred alternative). Smaller rainbow trout will also be a good option for this period. Having started working with some new farms due to the issues experienced by one of the major producers, we are confident that supplies will run well throughout the winter. Sea reared trout should be in good supply for December and into next year, but we expect prices to increase by circa 6% in January as they follow salmon prices.
Halibut	We have no reason to believe that there will be any issues with the supply of farmed halibut over the next three months. Halibut is such a versatile fish that can be prepared in many different ways - either as bone free portions or bone in darnes. It can be cooked in a myriad of different ways, grilled, pan-fried, oven baked and even served raw in sushi or ceviche. Many chefs actually now prefer farmed halibut to the unsustainable wild fish. This is partly due to the extra layer of fat that browns up beautifully, but also because farmed halibut are very consistent in quality whilst the wild halibut can vary enormously in texture. Other than increases in fuel surcharges, we expect the price to remain steady and availability to be good.
Other Farmed Species	We are delighted that our farmed meagre now attract an MCS 2 rating. This means that even more of our sustainability conscious customers can add the fish to their menus with a clear conscience, whilst improving the overall percentage of MCS 1 and 2 rated fish they use. We are expecting a small increase in price due to slower growing fish at this time of year. The 1-2kg and 2-3kg sizes will be shorter in supply but the larger 3kg+ sizes should be consistently available. There is a huge shortage of farmed turbot throughout Europe. The biomass is very low with farms only achieving 10% order fulfilment whilst they are waiting for fish to grow on. This is definitely one to avoid at the current time, with their wild counterparts fetching high prices due to export demand. Consider using halibut instead of turbot whilst this situation prevails.

WILD FISH

Species	Comments
Flat Fish	We are entering a transitional period for some of our flat fish. Plaice are about to enter their spawning season. Processors are buying up volume for freezing before yields start to decline at the end of December. This is pushing prices up. One to avoid in the winter: Lemon soles are subject to seasonal demand in December. Prices will increase in the run up to Christmas – usually to exorbitant levels when we review historical data. These should reduce to some degree in January, but not until fishing effort resumes to more normal levels by mid-month. Dover soles should be steady in price, but the strong export demand from the continent is keeping prices buoyant. Megrims (or Cornish soles) are predominantly sourced from the South West. This stock spawns between January and April, so should be avoided during this period. Look out for any specials during December to make the most of this underutilised species before that time. Both brill and turbot will fetch high prices during the festive period so look out for specials only.
White Fish	The quality of cod and haddock during the winter months is at its best and yields are good. We are expecting less volume of the smaller fish that produce 110g – 280g fillets of both species. This is because the winter weather tends to reduce the landings of these sizes. Couple this with the reduction in fishing effort at the end of December, and we could see some increases on these lines. In contrast, until the reduction in fishing, there should be increased landings of larger fish as these are much fatter at this time of year. As a result, we expect that larger cod will be unlikely to increase or decrease - the forthcoming quota reductions creating some pressure on stocks. However, the 340g+ haddock fillets should reduce. Coley will be a great option for the winter. Not only have concerns over sustainability been further alleviated in the recent MCS rating review, but it is also a cost effective choice. Hake prices are high currently, and could well increase further in December as historical trends have shown. Hake is a hugely popular species on the continent. It is called “Merluza” in Spain and is one of the most popular fish in the country. This creates very strong export demand – particularly for Christmas menus where fish features very strongly. There will be fish available, subject to adverse weather, but you can expect to pay more than usual. UK pollack is likely to rise in price, but concerns over sustainability, as outlined in the overview, should be enough to dissuade operators from listing on menus.
Round Fish	Monkfish, rather like lemon soles, will see price inflation through the course of December as a result of their tremendous popularity at this time of year. Quality will be excellent, but expect to pay more as the month goes on. Once fishing effort resumes mid-January, prices should start to lower. December is not a good time for mackerel. With quota finishing at the end of November, fish become scarce. Any available fish fetch extremely high prices. We do see some fish during January at more competitive prices, but the UK stock can be hit and miss until new quota in late spring. Gurnard is a winter fish, so they are in season. However, be very selective in your sourcing as some species variations / stocks are poorly rated by the Marine Conservation Society. With red mullet stocks improving, this is another fish you can put on the menu with confidence. However, we are now outside of their best season. As a delicate fish, you may be better to wait until they come inshore during the summer months. There may be some locally caught sardines around depending on weather conditions. Always a cost effective and healthy choice.
Cephalopods	As predicted in the autumn catch up, the recent ratings review has not seen any improvement to our native squid, octopus and cuttlefish. As highlighted in the overview, another key species used in frozen applications has also been down rated to a 5. We are stocking some MSC certified squid and MSC certified octopus tentacles, so speak to your account manager who can advise about these options.
Exotics	There is good availability of tuna and swordfish and we do not expect this to change over the forthcoming months. December tends to see greater demand for our native species, which creates stability in the supply of fish from warmer climates. Either species should offer a good choice through winter months. Our superfrozen tuna is ideal for raw applications.
Shellfish	Canadian lobsters have remained firm in price for several months. The season peaks again in December, but festive demand will keep prices firm. We expect that prices may rise in January and February as we rely on pounded stock to satisfy the volumes required over Chinese New Year and Valentine's Day. Native lobsters have been running for longer than we would normally expect at this time of year. We believe this is due to the unseasonably warm weather we experienced in the autumn. Once temperatures drop, the available volume will reduce accordingly. Native scallops will rise in price during December because of seasonal demand. We do not expect the price to drop until well into the New Year. Fortunately, we can rely on supply stability of our MSC certified roeless scallop meat from the USA. Plentiful supply means that these are a good choice currently. Mussels and oysters are in season and good quality. Mussels can become short in availability over Christmas due to reduced harvesting, so consider a frozen substitute during this time. Our range of oysters are ever popular for New Year, so ensure you tell us about your requirements well in advance of your delivery day to ensure we can fulfil all your orders. There will be a short shut down at our crab supplier over Christmas, so we will be carrying more stock of the longer life pasteurised products during this time. Our Devon crab is a superb product – whether you use in a sandwich, to upscale a prawn cocktail, crab blinis on New Years' Eve, or use the brown meat to enrich a soup or stew. Consider a dressed crab as a premium, yet simple and low labour, show-stopping dish. Palourde clam volumes tend to decline over the winter months so expect a price rise here.

Disclaimer - the market report is a guide using information from our buyers who have a wealth of experience.

Other influences still effect greatly the market place, weather, seasonal changes, supply and demand in retail and catering alongside exchanges rates.

SMOKED, DELI & FROZEN FISH

Species

Comments

Smoked Fish

As always, smoked salmon will rise in price along with fresh salmon. We expect that December prices should, in the most part, be relatively stable. In the New Year; you should consider alternatives. Perhaps smoked sea reared trout, or smoked ChalkStream® trout to add an element of difference to the menu when it is challenging to absorb or pass on increases on traditional smoked salmon lines. In the absence of reliable fresh mackerel supplies, perhaps utilise smoked mackerel – rich in healthy fats, protein and selenium. Remember that fish is a healthy protein, and with many of the population on a January health kick, a broad range of species on your menu should have great appeal. Smoked haddock should also remain a good choice on the breakfast or main menu.

Deli

Both prawns in brine and crayfish in brine have recently seen an increase in raw material price. Both products are also subject to the increased fuel surcharge. Expect a small increase over the next three months. The majority of deli lines are relatively stable in supply. Consider using avruga caviar on your festive canapés, or one of our lobster; fish or crab soups for an easy and healthy January starter.

Frozen Fish and Seafood

Frozen prices remain reasonably stable. Our range provides valuable options over the volatile winter period when reduced fishing effort and adverse weather interrupt fresh supplies. Frozen pollock has seen a real surge in popularity in retail sales this year and should be considered as a great value white fish alternative over the next three months. MSC certified, they can be used in fish and chips, goujons or fish cakes. We are carrying good stocks of frozen cod fillets currently and should be able to offer some deals on these lines over the forthcoming quarter. We have an offer on boxes of frozen trout portions currently as a response to the likelihood of salmon increases. Packed 10 to a case, graded 140-170g, and scaled. Ask your account manager to see these. They are a brilliant cost effective alternative. AVOID frozen red snapper portions. There are serious availability issues. We are likely to run out. If you are desperate for a frozen red snapper product, speak to your account manager about frozen fillets (graded 200g-500g). Otherwise, consider frozen red mullet or frozen tilapia. We have good supplies of warmwater prawns right now. Ever popular in so many applications, these are a fantastic choice for the winter season. Fish cakes are high on our agenda right now. We have recently introduced a broader range of gluten free fish cakes to our range, and we continue to work with our bespoke supplier in the North East to develop fish cakes with unique recipes and superior quality. Talk to your account manager about the many options we offer which include cod and prawn, spicy crab, and cod and pancetta. If you are short staffed, these present a simple and low labour fish menu choice, which are unfailingly popular with the consumer.

Manx king scallop fishery sees sustainability rating increased

Source (full article): fishfocus.co.uk

The Isle of Man's king scallop fishery, which opens next month, is now rated among the most sustainably managed in the British Isles by the Marine Conservation Society (MCS).

The improved rating appears in the MCS's annual Good Fish Guide, which includes around 600 reviews that help consumers make informed decisions about seafood they consume.

Lorna Jane becomes first electric vessel to join UK fleet

Source (full article): fishfocus.co.uk

No noise, no fumes, no diesel; the 21-footer is the first in the UK fishing fleet to be entirely powered by electricity supplied mostly by solar panels during the summer.

Hans Unkles launched the UK-registered Lorna Jane in June from his home village of Tayvallich in Scotland, where he designed and built it in his garden workshop, and since then has been sailing out each week to pull up lobsters.

Landmark herring catches for isle of man fisherman

Source (full article): fishfocus.co.uk

Isle of Man fishermen have started to catch herring in Manx waters thanks to new UK quotas that could enable a commercially viable Manx fishery for the first time in 25 years.

The agreement between the Isle of Man and UK governments allows Manx boats to catch up to 100 tonnes of herring this year, and could quadruple by 2026.

Which fish should i eat? Seawise healthy seafood guide

Source (full article): fishfocus.co.uk

A nutritional powerhouse, seafood is broadly recognised as a healthy food option. And the general consensus among health practitioners is that we should be eating at least two portions of fish a week, including one of oily fish.

Beyond this generalised recommendation, which fish should you be eating? Compiled by SEAwise, a new personalised seafood recommendation answers this question for European consumers in an effort to guide their choices as they do their weekly shop, and ensure they are getting the right variety of seafood to meet their specific health needs.

Recipe Corner

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

Asparagus & crab salad

View the full recipe at fishfocus.co.uk

Spiced coconut mussels

View the full recipe at fishfocus.co.uk

Monkfish with mussels, leeks and courgettes

View the full recipe at fishfocus.co.uk



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