

CATCH-UP

Winter 2025

Featuring this season's Market Report, our fish buyers' picks and a round-up of fishy industry news.



directseafoodslondon.co.uk
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Fish and chips are still Britain's number one fish dish

Source (full article): fishfocus.co.uk



Despite Gen Z and Millennial's Love for Sushi and Fish Tacos

A new poll has revealed that almost two-thirds of Brits of all ages (63 percent) say nothing beats the battered classic, making it the nation's go-to favourite seafood dish.

The result will come as a shock to Gen Z and Millennial diners, who have embraced trendier options such as sushi, prawn linguine and fish tacos – all of which failed to come close to topping the seaside staple nationally.

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UK Seafood Conference on consumption

Source (full article): fishfocus.co.uk

UK Seafood Conference on consumption. The UK Seafood Conference on consumption, brought together leaders from across the seafood supply chain for a landmark day of collaboration, insight and ambition.

Hosted at the historic Fishmongers' Hall in London and led by the UK Seafood Federation, the event marked the first in a new national series focused on how industry, government and partners can work together to make seafood a bigger part of the British diet, supporting healthier lives, a sustainable planet, and a thriving economy.

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Health, nutrition and origin highlighted in new Erling Haaland x Seafood from Norway Campaign

Source (full article): fishfocus.co.uk

A balanced diet is important when it comes to physical performance, and according to Erling Haaland, Norwegian seafood is a great choice for a nutritious football diet.

This year, the Norwegian Seafood Council (NSC) is ramping up the Haaland partnership, showcasing his commitment to a healthy seafood diet.

[→ Read more](#)

★ Buyer Recommends

Good picks this season include:

- 🐟 Gilthead Bream
- 🐟 Mussels
- 🐟 King Prawns
- 🐟 Dressed Crab
- 🐟 Sea Reared Trout

💬 Social Catch-Up

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FASFA reassures the nation: Fish and chips are here to stay

Source (full article): fishfocus.co.uk

Following a series of alarming headlines over the weekend suggesting that the UK could "run out of fish & chips," the Frozen At Sea Fillets Association (FASFA) is reassuring the public that Britain's most iconic dish is resilient and is navigating these challenging times.

As the representative body for some of the largest suppliers of cod and haddock to the UK's fish & chip sector, FASFA strongly refutes any claim that the nation's favourite meal is at risk of disappearing from menus.

[→ Read more](#)

Fish Market Report

Winter 2025

OVERVIEW

Welcome to the winter 2025 newsletter, which aims to cover the December to February period for the supply of fresh and frozen fish and seafood. This is the most volatile season of the year as we deal with a perfect storm of peaks and troughs in seasonal demand, reduction in fishing effort due to the Christmas break, and many flat fish entering their spawning season in January.

The recent Marine Conservation Society (MCS) updates bring some good news and some less positive news for some of our key species. Whitefish supplies have been particularly hard hit in 2025. Another 20% reduction in the previously huge Bering Sea quota signifies extreme anxiety regarding the sustainability of our favourite North Atlantic cod. As a result of this cut in quota, the MCS have now rated most Bering Sea cod a 5 (red rated fish to avoid). This will affect many UK suppliers who rely on this species landed in Norway and processed in China. With the challenges in supply, we have undertaken a project to source many of these frozen lines in the alternative MSC certified Pacific Cod. This is MCS 2 rated and offers a suitable alternative for the sustainability conscious customer. We should confirm, at this juncture, that that all our fresh caught Icelandic cod will remain 3 rated or 2 rated if MSC certified. Another white fish that has suffered a down grade from a 2 since losing MSC certification is our North Sea coley which is mainly landed in Scotland. This will now be an MCS 4, affecting overall volumes of available sustainable white fish. There is coley available from other areas (Iceland and Norway for example) which carry better ratings. Haddock caught off the South coast of the UK will now be 5 rated as well as some Norwegian haddock out of the Bering Sea which will be 4 rated. We are, however, well placed to continue sourcing beautiful fresh haddocks out of Iceland and Scotland which will remain either 2 or 3 rated. Unfortunately, another great UK favourite, the lemon sole, is due a downgrade from a 3 to a 4 or 5 rating leaving only dover sole or megrim sole as great alternative single portion flat fish. Most UK landed plaice also faces downgrades to either 4 or 5 ratings, other than Scottish North Sea plaice or West country trawled plaice which will remain 2 and 3 rated respectively. Finally Baltic sprats which are more commonly known as whitebait are now rated 4.

On a more positive note, and a great triumph that goes to show how positive management plans can help rebuild a stock, wild caught sea bass from the most common areas around the UK will now be 2 rated, whether line caught or trawled. Several scallop fisheries that were previously 4 or 5 rated will now be 3 rated. This means it will be easier for us to ensure we are sourcing the most sustainable UK caught scallops. Finally, after a number of years with no rating, the MCS have rated our beautiful MSC North Sea Shrimp a 2 rating.

Seafood consumption is in decline, and the changes in sustainability rating for some much-loved species is far from ideal. At the recent UK Seafood Federation Conference on Seafood Consumption, several speakers highlighted the reasons why we should be eating more seafood – not less. This includes the health benefits such as preventing cardiovascular disease, reducing heart disease, and supporting cognitive function through Omega-3 fatty acids. Seafood also offers leaner, more efficient protein sources than meat. It is second only to poultry as the largest source of protein. Whilst the UK consumer continues to rely on the big 5 (salmon, cod, haddock, prawns, and tuna), we run the risk of further decline due to the price barrier of some of these core species in the current climate. More than ever, we need to diversify our tastes to other species – both to protect those under pressure and to ensure that we are enjoying all the health benefits of eating at least 2 portions of fish a week.

Natalie Hudd, Director of Sales, Direct Seafoods.

Farmed Fish

Species	Comments
Sea Bass & Gilthead Bream	Sea bass mortality rates have been catastrophic this year as we have detailed in prior updates. This means that availability continues to be much reduced. Whilst we hope for better news in 2026, prices look to stay firm until Easter. As demand heading into the festive season increases, prices are rising again on the back of the lack of supply. During 2025, record levels of fingerlings have been put into the farming process, hence 2027 should see much increased volumes, subject to mortality rates. It is, however, a long wait. Gilthead bream, being less popular than bass, is a more stable picture. While prices remain firm, we are not expecting further increases on this species.
Salmon	Prices should be higher in December and remain high into January in line with historical trends. Smokers are increasing the volumes purchased for their final Christmas push. This demand always creates inflation. The worst period we are anticipating will be from the week before Christmas and into the middle of January as reduced harvesting creates shortages. We have seen upwards of 25% increases in the price during this time of year and have no reason to believe any different as we move into 2026. Consider frozen salmon options during this time including our range of pacific salmon portions. We have got some smaller gradings which are perfect for those customers who are on a health kick after over-indulging during Christmas. Speak to your account manager for more details.
Trout	Smaller freshwater rainbow trout are expected to remain stable in price. These fish see extraordinarily little demand except for smoking as they are perceived to be unpopular with the UK consumer. The larger trout however, due to the similarities with salmon, continue to be an easier sell. There has been a marked move into trout farming in Norway as they are a more resilient species in the farming process with fewer mortalities than typically seen in salmon farming. The Norwegian sea reared trout are the absolute closest alternative to salmon as they are more akin to salmon in size, and the yields are much more similar. The price is likely to mirror any movements we see in salmon. Our ChalkStream® freshwater trout from Hampshire is also expected to be stable in availability and price. These fish are slightly smaller, and the yield is not as good as the sea reared. As a result, you can expect your fillets and portions to cost more even when the whole fish price is equivalent. We are also offering Mòr Atlantic Trout from Scotland. This is a premium product with a premium price as it is the only trout grown in full salt water in the UK. Speak to your account manager for more details.
Halibut	Farmed halibut prices are not expected to move in forthcoming months, although this premium flat fish is at the more expensive end of the scale. Those of you wishing to use a large flat fish on your festive menus would be well advised to consider farmed halibut versus wild brill or turbot which can be in short supply and at extortionate prices. Halibut also has a much better yield to portions, and the farmed fish are a sustainable choice. Avoid wild fish which are still red rated by the MCS and considered endangered by the International Union for the Conservation of Nature (IUCN).
Other Farmed Species	There is some pressure on meagre. Growth is slower in the winter months. This lowers the biomass for the larger sizes as smaller fish take longer to grow on. We are therefore seeing increases on the larger sizes. With the good news on wild sea bass sustainability, this could be an alternative option during this period – although wild bass will carry a higher price tag. We are not expecting any movement in farmed turbot pricing, although these fish are already commanding a premium. If you are determined to offer turbot on your Christmas menus, these are a more reliable option than their wild counterparts, although they typically do not grow as large as the most desirable turbot grades.

Wild Fish

Species

Comments

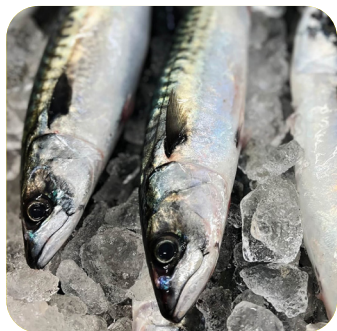
Flat Fish	We are entering a changeable period for flat fish as the spawning period for some species begins in earnest in the New Year. Plaice will deteriorate in quality as we get towards the end of December. Whole fish prices may not move significantly, but the reduced yields as they roe up means that fillet prices will increase. One to avoid until the spring. Megrim will be much the same in this respect. Prices are similar to whole plaice, so not an easy switch. Bottom trawled witch soles (or Torbay soles) from the North Sea (MCS 3) spawn later (March), so these are a viable alternative until plaice and megrim are back in season. Lemon soles are a core line during December as they grace many menus. The price is affected accordingly, and we see increases of up to 25% on the most popular sizes. These prices should start to ease around the third week of January as fishing efforts resume. Typically spawning in the summer, these fish should be excellent quality, but the downgrade in MCS rating is a concern. Avoid beam trawl fish from the North Sea which are now rated a 5. Turbot and brill spawn much later (spring and summer) but we are likely to see increases in the run up to Christmas and immediately after as demand for these superior flat fish intensifies – particularly from the continent where fish is such a core part of their festive celebrations.
White Fish	The current white fish situation is dire. We have never seen lack of supply, soaring prices, and demand as it currently stands. The demand for cod is exceptionally strong against the backdrop of reduced quotas in all major fisheries, a poor exchange rate, and the continued sanctions against fish of Russian origin. Cod has become a premium species. It has become too expensive to keep on menus as a mid-range or budget line. “The system is broken” has been used to describe what is going on in the market. It is a complete breakdown of the normal mechanisms and there is no short-term fix. If quota advice is followed, there is some expectation of the situation improving in 2027. For now, more increases are unavoidable for December and beyond. Haddock, whilst not subject to the quota cuts of cod, is being turned to as the most natural substitute. The haddock quota simply will not compensate for the cuts in cod. Prices on key fish and chip sized haddock are circa 40% higher than prior year. If there is a failure to increase flexibility of size tolerance or species, then it is inevitable that this core menu line will have to increase substantially. It is not as simple as moving all volume to fresh hake or whiting because we simply do not see the volumes and gradings that customers have come to expect in these species. The only solution is to have fully dynamic menus that enable operators to change their offerings on a daily basis to the best white fish on that day and be flexible around the specification. Even our frequently recommended coley has not been immune from inflation with large fillets now fetching the same prices we paid for cod 2-3 years ago – a 20% increase on prior year. Please speak to your account manager about the range of options available to you. Hake is expected to see the usual surge in demand during December being such a core line for the continent on Christmas Eve. It should become more affordable in the New Year once fishing effort resumes and providing there are no adverse weather conditions. Trawl and gill net pollack remains an MCS 4. Some of you may recall that this was the go-to species around 2003 onwards when concerns were raised as to the sustainability of cod. The volume requirement became such that stocks have still not recovered. There may be pockets of fish to be seen for the occasional special, but it is certainly not abundant.
Round Fish / Other Fish	Monkfish is a festive favourite – particularly wrapped in parma ham or prosciutto. Monk is available all year around. We do not see the varying quality that we do in other species which makes it an excellent choice. It is also rated a 2 or 3 by the MCS. This is the time of year where we will see the price rise due to its popularity, but we expect this to ease around the third week of January. Gurnards are now in season as a winter fish. Choose red and grey varieties for the most sustainable options. Mackerel is one to avoid. The situation has deteriorated further to our last update. Fish have continued to escalate in price as expectations of a steep supply drop next year have forced Asian buyers into a fight for raw material. The Total Allowable Catch (TAC) for North Atlantic mackerel was set at 576,958 tonnes for 2025. This is a 22% reduction from 2024. The International Council for the Exploration of the Sea (ICES) have recommended a further 70% reduction for 2026 to prevent stock collapse because of persistent overfishing. Mackerel traditionally jumps in price in December as the Scottish quota concludes in November. This is expected to be much worse this year due to the issues detailed above. The effects of this are now being seen in smoked mackerel prices. Whilst seen as a summer fish, sardines may be an ideal alternative to mackerel. With most fish rated a 2 or 3, these are a low-cost alternative. If persistently severe weather affects the availability of fresh, there are good frozen options available. Due to the improved rating for wild sea bass, we can include these as a recommendation for your menus. The fishing ban during the spawning season will be implemented from the 1st of February until the end of March, but you can use these fish with a clear conscience until that time. Providing a desirable alternative to meagre and farmed bass – both of which are seeing biomass issues – wild bass is ideal for a prime place on the menu. It is not a “cheap” option, but it is a top-quality fish that has been a chef and customer favourite for decades.
Cephalopods	There are still no changes in the MCS ratings for squid, octopus, and cuttlefish. Native squid is now in season, but we recommend talking to your account manager about our MSC certified squid and octopus for a more sustainable choice.
Exotics	Exotic species do not typically see the spikes in demand that we see for other fish and seafood in the run up to Christmas, seemingly more popular in the summer months as part of mediterranean style dishes. The appetite for tuna as part of sushi and sashimi, however, seems insatiable. Both tuna and swordfish are expected to have good availability and be excellent quality over the next three months, with increases limited to the weak exchange rate. As always, use our MCS 3 rated Superfrozen tuna for any raw or partially cooked applications. We are now seeing more MSC certified yellowfin tuna so please ask your account manager about sourcing this accredited product. Available as frozen portions or saku blocks.
Shellfish	December sees a short season for Canadian season lobster, and this will be the last of 2025. We will then revert to panned stock until spring 2026. Prices have been very firm throughout the year, and we may see an increase in some of the larger sizes in December on the back of festive demand. Prices are not expected to lower in the medium term as there will be demand from China for Chinese New Year in February, and Valentine's Day volume requirements. If we do not experience a very cold winter in the UK, then we could see better availability of native lobsters around our shorelines, although prices are expected to be high. Mussels are now in the best season so please do add these to your menus as they tick every box in terms of sustainability, affordability, and health benefits. Low in fat and high in protein, vitamins, and minerals, we stock varieties from all around our UK shoreline for great provenance. Supplies can be a little short over Christmas week, so do consider the frozen mussels in the shell as a substitute. The MSC Poole clam fishery season will conclude at the end of December until May 2026. We expect to see higher prices over the winter months as they burrow deeper into the sand, and the fishery reverts to hand gathering which will reduce volumes. Native scallops typically come under price pressure in December as a popular addition to many Christmas menus, reducing again mid-January. We would normally recommend imported roeless scallops as a more stable alternative, but there have been many issues through Japanese and American fisheries which means prices are sky high. Catches in Japan are down by 30%, and USA meats are being kept for use domestically due to a lack of larger sizes. We are pursuing the avenue of roeless UK scallop meat as an alternative. We also have our exclusive frozen MSC certified scallop medallions which are a great substitute. Crab meat prices are expected to remain stable over the winter, and we have a multitude of gradings which can be mixed to keep costs down. Please also speak to your account manager about the variety of dressed crabs we can offer to suit any budget.

Smoked, Deli & Frozen Fish

Species	Comments
Smoked Fish	It is unusual to be in a period where we would say that smoked salmon prices are more stable than some other species. Yet here we are. Larger haddock fillets over 340g are the desirable size for smoking. These fillets are now in more demand due to the pressure on large cod fillets due to the shortage of supply. This means that we are seeing prices at never-before-seen levels on smoked fish. This is not helped by the increase in processing costs since last year. We love to recommend smoked haddock at this time of year in hearty breakfasts and with a poached egg on a main course. However, this price volatility may make this menu favourite prohibitively expensive. Smoked mackerel is one to avoid because of the issues we have detailed on shortage of supply. We have seen an eye watering 45% increase in the cost in recent weeks. We do not expect any reduction in the medium to long term. Another one to avoid. Smoked salmon, however, can always be relied on as a staple of festive menus. We do expect some incremental increases over December and into January due to reduced salmon harvests, but with the range of cures and specifications, there will be something for every budget and palate.
Deli	Deli lines are broadly stable. This is a great time of year to add these to your menus as they have a long shelf life, so can be stored without the concern of wastage over periods where supply lines are subject to interruption and fishing efforts reduce. With caviars and roes, from premium sevruga and oscietra to the humble lumpfish roe, there are a plethora of colours to adorn your canapés.
Frozen Fish and Seafood	The outlook for frozen white fish is gloomy, but unsurprising given the challenges we have highlighted in the industry. There is a shortage of cod, both single Frozen into the UK and European market but also for onward processing into China, due to the quota cut. Prices are sky high on frozen at sea cod, and this has been the case throughout 2025. Add to this the sanctions put on Russian fish by the EU and USA, and it is creating a fundamentally distorted market. These prices are expected to last until 2027 or beyond as we wait for stocks to recover. The recent currency dip is also putting upwards pressure on forward pricing. The demand for IQF haddock is escalating, driven by the increases on cod. This demand is predominantly from the USA and UK. A decrease in price is now not expected to happen until late 2026 and into 2027. This is because the reduced cod quota is forcing fishermen to spread out their fishing during the year and to target the premium specie (cod) with less focus on haddock, despite the increased quota. The frozen haddock inventories in the UK, China and the EU/USA are exceptionally low. This has moved frozen demand onto fresh, which is creating more inflation. The increases you will be seeing on these lines is astronomical. There are more economical frozen white fish alternatives available (pollock and hake), but these are not immune from inflation. Pollock has risen as demand has increased significantly due to the cod and haddock prices. Other frozen lines that are suffering due to the inflation in fresh prices include sea bass and smoked mackerel. Switching to frozen will not mitigate the increases in these instances. On a more positive note, we have good stock of king prawns which are stable in price. One of the top five fish choices in the UK and so versatile. We also have a fantastic range of frozen pacific salmon portions available which offer a cost-effective option for the Winter.

UK mackerel supplies under threat

Source (full article): fishfocus.co.uk



UK mackerel supplies under threat as new scientific advice recommends 70% cut to catch in Northeast Atlantic: MSC reactive comment.

"The advice is a stark warning: without urgent action, mackerel stocks are at very real risk of collapse.

[→ Read more](#)

Numerous health benefits of shrimp

Source (full article): fishfocus.co.uk

Shrimp is a type of shellfish seafood that is abundantly found in both freshwater and marine habitats.

It is widely consumed across the globe owing to its high nutrition content. It is a great source of iodine that is essential for proper thyroid function. It is low in fat and contains omega-3 fatty acids that promote brain health. It is rich in antioxidants and protein with low carbs, which makes it highly popular among health-conscious consumers.

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For species insights and menu inspiration contact your account manager.

Reviving our coastal bounty: A review of great British Seafood Revival

Source (full article): fishfocus.co.uk

In Great British Seafood Revival, food writer and seafood educator CJ Jackson joins forces with veteran photographer Steve Lee to produce a richly evocative celebration of Britain's fishing heritage.

it is both a cookbook and a cultural manifesto, urging readers to rediscover the wealth of sustainable seafood that surrounds our shores.

[→ Read more](#)

Recipe Corner

Looking to refresh your winter menu?
Explore these flavourful seasonal dishes.

● Sardine tin pie

Source (full article): fishfocus.co.uk

● Pan-fried white fish with chilli, coriander & tomato 'kachumber'

Source (full article): fishfocus.co.uk

● Oven-baked halibut with apple butter sauce

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.

directseafoodslondon.co.uk