

CATCH-UP

Autumn 2023

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

'Severe' marine heatwave recorded around UK and Irish coasts

Source (full article): [fishfarmermagazine.com](https://www.fishfarmermagazine.com)

An alarming new report revealing increased sea warming around the British Isles and Ireland indicates potential challenges for the fish farming sector.

The findings by the European Space Agency suggest that some of the most intense marine heat increases on the planet, up to 4C above expected temperatures for this time of year, have been recorded in coastal waters around the UK and Ireland. The findings are also backed up by the UK's Met Office.

So far, however, the salmon industry appears to see the warm early summer temperatures as within acceptable risk parameters.

Last summer was the hottest on record and salmon companies in Scotland and Ireland blamed some of their biological problems on those record temperatures.



Not eating enough seafood and other healthy foods, associated with higher cardiovascular disease

Source (full article): [fishfocus.co.uk](https://www.fishfocus.co.uk)

Not eating enough seafood and other healthy foods, associated with higher cardiovascular disease and deaths globally. A study led by McMaster University and Hamilton Health Sciences researchers at the Population Research Health Institute (PHRI) has found that not eating enough of six key foods in combination is associated with a higher risk of cardiovascular disease (CVD) in adults.

Consuming fruits, vegetables, legumes, nuts, fish and whole-fat dairy products is key to lowering the risk of CVD, including heart attacks and strokes. The study also found that a healthy diet can be achieved in various ways, such as including moderate amounts of whole grains or unprocessed meats.

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BUYER RECOMMENDS...

Good picks this season include:

- Farmed Sea Bass
- Plaice
- Mussels
- Smoked Haddock
- Warmwater Prawns

SOCIAL CATCH-UP...

@Neve_Fleetwood

Eating salmon can boost hearing, says study

Source (full article): [fishfarmermagazine.com](https://www.fishfarmermagazine.com)

Eating seafood high in Omega-3 such as salmon can dramatically reduce your chances of acquiring serious hearing issues in later life, an intriguing new study has uncovered.

Omega-3 acids are known as docosahexaenoic acid (DHA). The study, examining over 100,000 individuals in the United Kingdom, found an inverse relationship between blood DHA levels and hearing difficulties. It appears that people aged between 40 and 69 with higher DHA levels experienced 8-20% less age-related hearing issues than those with lower DHA levels. Essentially the more DHA present in the blood, the better the hearing ability appeared to be. These people were also 11% less likely to say they had difficulty following conversations when there is background noise.



FISH MARKET REPORT Autumn 2023

OVERVIEW

Welcome to the autumn 2023 newsletter, which aims to cover the September to November period for the supply of fresh and frozen fish and seafood. This is my favourite calendar quarter to write about as we see so many species at their absolute best – both in quality and abundance. We also typically see less volatility until we get to the end of the November when the festive effect starts to kick in.

It has been a difficult summer. June was spectacular in terms of both trade levels and weather. It certainly promised more than what we saw in July, and subsequently August. Whilst the weather has certainly not helped in encouraging the British public out of their houses and into the gardens and terraces of catering establishments nationwide, there are strong signs that the current economic climate is squeezing the everyday consumer, and our businesses are feeling the effects. The British “staycation” seems to have failed to sustain the momentum of prior years, with the public electing to travel to warmer destinations further afield. With September just around the corner, we wait with some trepidation as to what the trading climate looks like once the schools are back.

We are already seeing signs of some catering establishments “trading down” in terms of their offerings. As purveyors of quality fresh and frozen fish and seafood, we are keen to dissuade our customer base from electing for a more basic and de-skilled offering. We know that it is possible to design a menu that features a varied range of quality fish products that are simple and quick to prepare, and we are always increasing our range, in conjunction with our wonderful suppliers, to develop solutions for every genre. It is our aim, as we head into the autumn months, to increase our engagement with you all in terms of menu development, new ideas, and ways to increase the efficiency of our trading relationship. For those of you who do not already order online, please speak to your account manager about signing up to our online app. The app can provide you with visibility of your account, including order history, downloadable allergen data, and copy invoices, at the touch of a button. Removing the manual element of processing your order not only avoids human error, but it will also free up time in order that your account manager can spend more time working with you on finding ways to achieve a balanced and varied menu at a cost that is viable.

So back to the autumn season. White fish should be exceptional quality and abundant as the waters cool and the new Icelandic fishing quota commences. Bivalve molluscs such as oysters and mussels will be back in season, with the latter offering a low cost and sustainable local option. There should be good landings of monkfish, hake, and lemon sole. Farmed fish generally look set to decrease in price, with salmon having eased off to much more affordable levels. We are hopeful that salmon and smoked derivatives will be reasonably priced throughout the next three months. Overall, despite the worries and concerns about the trading climate, we are optimistic that we are over the worst of the price inflation we have all endured since 2021.

For price stability, talk to your account manager. Now is the season to consider freezing down some of our fantastic native wild caught species for the festive period. As you all know, we see a reduction in fishing effort as we near the 25th of December. If you are considering hake, monkfish, lemon soles, brill or turbot for your festive menu, and you do not wish to pay extortionate prices, get in touch with your account manager and discuss the possibility of securing and freezing stocks now. We have successfully employed this process for many years. Furthermore, if you are considering a fish item for your menu, but are nervous about the general volatility in the market, talk to us about the potential of a longer-term price fix. We are here to help you.

Natalie Hudd, Director of Sales, Direct Seafoods.

FARMED FISH

Species	Comments
Sea Bass & Gilthead Bream	Both sea bass and gilthead bream will be a good choice for this autumn. Biomass levels are good on all sizes except for the larger 800g + sizes, which are lower in availability. Prices look to be stable or reducing. Versatile and popular, try playing with different sized fillets to lower the cost – smaller fish are cheaper. Both species are rated a 2 by the Marine Conservation Society – recommended fish to eat. Use either species to boost the proportion of sustainable fish on your menu, and your sustainability credentials.
Salmon	Prices in Norway are currently falling, and trade is down. There have been some soft fish appearing recently which means that we have to be selective about the farms we use. The expectation is that salmon prices will fall during September, and should be stable until we hit the end of November when demand from the festive period kicks in. Certainly, by reviewing historical trends, this “should” be the case. It may be one of those rare seasons where you can put salmon on your menu with a little more confidence. Beware, however, of prices going from December into next year. The last two years tell us that the salmon farmers will be keen to replicate the record prices reached in the first six months of 2023 and 2022. Do not be surprised if this happens again. For now, however, salmon should be a stable choice.
Trout	ChalkStream® trout look to be a good choice for the autumn. Providing there are no spikes in demand that compromise their harvesting ability, we should see reliable supplies and steady prices. The smaller rainbow trout have been subject to some recent increases in price due to further issues that one of the major farms have encountered with reported stock levels and mortalities. They have had to stop production to grow fish on and are not scheduled to open again until the middle of September. This is, however, the third closure this year and they cannot rule out further disruption. We have sourced fish from some alternative farms, but a price increase has been unavoidable due to reduced availability. Sea reared trout is forecasted to be stable with no supply issues.
Halibut	Availability should be good on all sizes. However, as trade is quiet, and therefore demand is down, harvest volumes have been reduced accordingly. When harvest volumes are lowered, the cost of production goes up which can cause prices to rise. Nevertheless, we are forecasting stability on all sizes for the next three months. Farmed halibut is always a good choice to occupy a premium slot in your menu if you have room for it!
Other Farmed Species	Continued good biomass levels have resulted in meagre prices easing back and this means that they are yet another good choice for the autumn. They are a great alternative for the less sustainable wild sea bass as they are similar in texture. A relative latecomer to the world of aquaculture, their popularity over the last ten years has grown immensely. Farmed turbot prices are anticipated to be stable over the next three months. Never the best yield when portioned (like their wild counterparts) but delicious all the same! You need deep pockets to put turbot on the menu, but they offer a useful substitute when the wild fish are not available.

WILD FISH

Species	Comments
Flat Fish	Autumn is usually a good time for most flat fish. Plaice will be in season and should be utilised before they start to spawn at the end of the year. Landings should improve in both Iceland and on the south coast of the UK. Market prices should be at reasonable levels with fillet sizes from 170g upwards reducing in September. The 140-170g plaice fillets are expected to remain firm as this size is in demand from frozen buyers seeking to fill frozen inventories. We should also see a slight improvement in lemon sole prices due to better landings combined with new quota available. Beware, however, of lemon soles at the end of November when the price starts to increase. Dover soles are still seeing strong demand from Europe, and this is keeping prices high. We forecast that there will be a small reduction in market prices over the next three months, but they are still an expensive choice. Megrin soles remain a good option. Prices have risen a little of late, but they still represent a good value flat fish. List as "Cornish Sole" on your menus to increase their popularity. We all know that the average customer seeks familiarity in their menu choices, and "Cornish Sole" seems to resonate more with the general public.
White Fish	The new Icelandic quota period begins on the 1st September for cod, haddock and coley. Quota indications are cod +1%, haddock +23%, and coley -7%. So on the whole, it is not too gloomy a picture for our favourite white fish. The quality should be excellent from now until the end of the year as the cooler waters favour these species. So if you are looking for fish in prime condition, cod or haddock are both a good option. We are anticipating some easing of price once fishing for new quota has commenced. However, large cod is expected to remain quite firm in price, such has been the case for many months now. The expected 20% cut in Barents Sea cod quota next year is likely to keep prices buoyant. Smaller cod and haddock will be a good menu choice until the end of November. Coley will maintain its position as a quality low cost white fish that offers a much better value alternative than cod or haddock. Hake should be in good supply during September. There are deals to be had on some days dependent on volumes of landings, so check in with your account manager for any special offers. If you are looking to use hake over the festive period, seek to freeze some down during September and October when the price will be lower. Top tip for fish and chips – do not state the species on your menu. This enables you to interchange species according to which is the best value and quality on any given day or week.
Round Fish	Fishing for monkfish should be good during September and prices should ease back on the larger sizes. Rather like lemon soles, as a festive favourite you can expect prices to firm up at the end of November and into December. Consider freezing now for Christmas menus if you are keen to feature this versatile fish as a festive special. Mackerel have been running well of late as they are in season. We should continue to see good availability throughout September and October, with availability tightening at the end of November when quota finishes. A great low cost, versatile and healthy UK fish. Try pan fried with roasted butternut squash. Gurnard will come back into season in the autumn, but due to concerns over sustainability, these fish should be used sparingly. Perhaps used occasionally in a warming autumn stew as they are extremely flavoursome.
Cephalopods	Poor MCS ratings remain in place for native squid, cuttlefish and octopus. We await the autumn MCS ratings review, but are not expecting this to change. Jig caught squid is slightly better rated, but it is not easy to ensure that all your native fresh squid has been caught in this way. The best alternative to UK octopus are our MSC certified frozen octopus tentacles. Speak to your account manager for more information.
Exotics	There are no major holidays in the key fishing areas for tuna or swordfish in September, but fish landings in the North Indian Ocean have been poor. That being said, demand starts to tail off at the end of August as summer comes to a close. We typically see that the demand for exotic species declines in the UK in autumn and winter, and supply is steady. We do not anticipate any severe increases for either species over the autumn.
Shellfish	Fewer lobsters are caught in Canada from September until the season peaks again in December. The USA season carries on throughout the year and there are currently reasonable stocks of pounded fish available. However, stocks can fluctuate depending on the demand from China, and the price will also be affected by any exchange rate fluctuations. We are seeing varied price movements week on week, but overall expect prices to be firm for the next 3 months. Native lobsters will shorten in availability as the waters get warmer. One to avoid as the price typically rises steeply. We have secured good stocks of roeless USA scallops until the end of this year, so prices will be stable and availability will be good. Native scallops are also steady in price and we do not expect increases until December. Mussels and native oysters will be back in season in September. If the weather is unseasonably warm, it is best to wait until October until the best quality. We always champion mussels for their sustainability credentials and their low cost. They can be served as the star of the show in moules marinière or moules-frites, as a garnish to any fish dish, in pastas, or as part of a stew. Sourced from all around the UK coastline, they also tick the provenance box. Good supplies of palourde clams are anticipated in September, and we expect these to be a reliable and good quality choice over the next three months. Brown shrimps have risen in price of late due to a reduction in landings. Crab meat is expected to remain stable in price until next year, with good availability. Do not forget about our value added range of crab products, including arancinis, gratins, terrines and parfaits, to save time and labour in the kitchen. Talk to your account manager for more details.

SMOKED, DELI & FROZEN FISH

Species	Comments
Smoked Fish	With predicted reductions on salmon, we expect our range of smoked and cured salmon to follow suit. We have such a broad range to suit many palates and budgets, so speak to your account manager if you are looking for something a little different. Smoked haddock prices are predicted to reduce on the back of reductions in fresh haddock. Another great autumn menu line whether it be a smoked haddock gratin, kedgeree, chowder, fish cake, or served with a poached egg and crushed potatoes. Have you tried our smoked mussels? Deliciously moreish and a little bit different. We also stock hot smoked salmon, sea bass and mackerel pâtés. An easy, tasty and low labour idea to fill a spot on your starter menus.
Deli	We continue to see better availability of raw material for crayfish in brine, so we envisage that there will be some reductions in September. Prawns in brine should remain stable. Anchovy in oil are increasing in price. Fishing has been poor, sizes caught have been very small, and this has interrupted the flow of supply out of Turkey. Expect increases. We do not foresee increases on any other deli lines.
Frozen Fish and Seafood	Frozen prices are, in the main, stable. After what feels like years of increases after the pandemic, we are starting to see many lines becoming more affordable. Frozen cod fillets, skin on and skinless, are set to reduce following falling origin prices. They are likely to firm towards the end of the year, but it is good news for now. We are also seeing reductions in raw peeled warmwater prawn prices. This is due to a combination of favourable exchange rates and high stock levels globally. Prawns are always a good seller, and our raw peeled vannamei are BAP 4 star accredited. Buying these will enhance your sustainability credentials. Look out for our fish and chip promotion in September and October. We are offering frozen cod, haddock and pollock in larger sizes at promotional prices. The skinless MSC certified pollock fillets are 200-230g and packed 20 to a case. The cod and haddock are skin on, 280-340g, and packed 12 to a case. Talk to your account manager and get stuck in whilst stocks last!

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.

Smart-trawl, AI-powered fishing net to help prevent marine bycatch

Source (full article): fishfocus.co.uk

Fisheries Innovation and Sustainability, a coalition of experts working to drive strategic innovation for a prosperous UK fishing industry, funded by the FCFCT's Good Practice in UK Fishing programme, are developing new technology which could significantly reduce the amount of bycatch (the unintentional capture of non-targeted species) in fishing vessels.

Smarttrawl – an underwater robotic sorting device which helps fishing trawlers prevent bycatch by identifying and sizing fish and other marine life in real-time – is being developed by researchers from Heriot-Watt University in partnership with FIS, and funded by the UK Seafood Innovation Fund.



It's official we like seafood more when we eat it by the sea

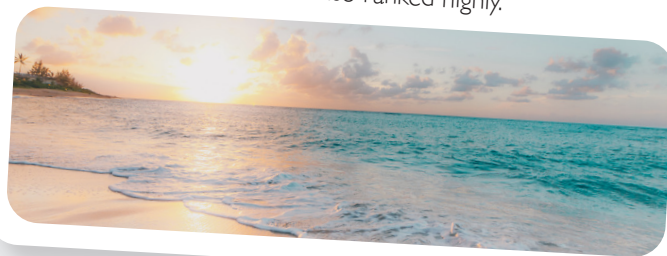
Source (full article): fishfocus.co.uk

There's always something more satisfying about eating a fish supper in view of the sea. But would you be willing to pay more for seafood if it was also within view of the boats that caught it?

The answer is yes, according to researchers at The James Hutton Institute in Aberdeen.

They surveyed residents and visitors to the Scottish inshore fishing towns Mallaig and Oban and found that people were willing to pay more than 3.5 times more for a portion of seafood when within view of an active inshore fisheries harbour.

When asked what was most important to them about their seafood supper, people put locally caught fish first when picking their seafood supper, followed by its environmental credentials. How fresh it was and if it had in fact been caught or harvested by more traditional small vessels were also ranked highly.



Government seizes post-brexit freedoms for fishing industry

Source (full article): fishfocus.co.uk

The UK Government has set out further steps to deliver a thriving, sustainable fishing industry and healthy marine environment for generations to come.

Seizing the opportunities of our freedoms outside the EU, the UK is introducing a world class system of fisheries management which draws on the best available science and the expertise of our fishermen to ensure our fish stocks are healthy and sustainable long into the future

This new system will be underpinned by Fisheries Management Plans – blueprints for how best to manage fish stocks – with the first six published yesterday, including bass, king scallops, crab and lobster; amazing produce which we are renowned for around the world.

Recipe Corner

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

Smoked haddock frittata

View the full recipe at fishfocus.co.uk

Spicy tuna pasta bake

View the full recipe at fishfocus.co.uk

Mussel linguine in tomato sauce

View the full recipe at fishfocus.co.uk

Crispy trout burger, watercress, fish burger sauce

View the full recipe at fishfocus.co.uk



Freshly prepared fish and seafood help towards reducing waste and supports sustainability



Take a look at our monthly blog for the latest industry insights.

Find out how we source freshly prepared fish and seafood to save time, costs, reduce waste and support sustainability.

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