CATCH-UP
Autumn 2025

Direct Seafoods
A Passion For Fish

directseafoods.co.uk

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

Alternative fish species could edge into spotlight as consumers grapple with inflation, finds NSC research

Source *(full article)*: fishfocus.co.uk

With 47% of consumers citing cost as a barrier to eating seafood, new research from the Norwegian Seafood Council shows growing interest in alternative whitefish species, showcasing opportunities for species such as saithe.

According to research from the Norwegian Seafood Council (NSC), as many as 47%* of consumers cite expense as the reason they choose not to eat seafood regularly. Among those who do eat fish often there is a noticeable shift to alternative whitefish species as they take cost into consideration.

A fish called...what? 70% of Brits can't name their supper

Source (full article): fishfocus.co.uk

New research from North Atlantic Fishing Company (NAFCO) has revealed that over 70% of the UK public can't identify cod and haddock – the most popular fish on their plates. The study highlights a startling gap between what we eat and what we know about our food.

The survey of over 2,000 UK adults revealed only one in five Brits could correctly identify a photo of a cod or haddock – the staples of our beloved fish and chips.

Marine scientists recommend quota cut for cod but increase for haddock in 2026

Source (full article): frymagazine.com

The scientists have put forward a total catch of no more than 269,440 metric tons of Northeast Arctic cod in 2026, 14% lower than the 2025 recommendation and 21% below the quota set for 2025.

The 2026 quota advice is the lowest recommendation since 2002 and follows ongoing concerns about cod stocks in the Barents Sea. If implemented, it would be the lowest fixed quota since 1991.

Buyer Recommends...

Good picks this season include:

- Salmon
- Halibut
- Plaice
- Mussels
- Monkfish

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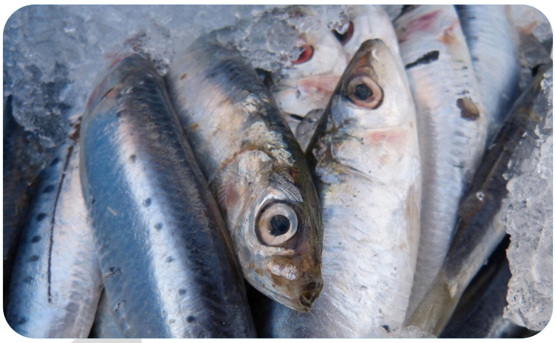
Eating an array of smaller fish could be nutrient-dense solution to overfishing

Source *(full article)*: fishfocus.co.uk

To satisfy the seafood needs of billions of people, offering them access to a more biodiverse array of fish creates opportunities to mix-and-match species to obtain better nutrition from smaller portions of fish.

The right combination of certain species can provide up to 60% more nutrients than if someone ate the same quantity of even a highly nutritious species, according to an analysis by Cornell University researchers.



Fish Market Report Autumn 2025

Overview

Welcome to the autumn 2025 newsletter, which aims to cover the September to November period for the supply of fresh and frozen fish and seafood. Typically, this is the best season for most of our native species. The cooler waters provide excellent conditions for quality bivalve molluscs and most fish are outside of their spawning periods. This means that you will see the best quality at this time of year. With the worst of the weather typically presenting December through to February, we are hopeful of good landings all around our native coastlines. There should be a great selection of fish available – particularly for those specials boards. Contact your account manager for ideas to differentiate your menus.

The whitefish market is still extremely volatile with demand currently outstripping supply. Sanctions on fish of Russian origin are impacting availability, with Russia historically accounting for 40% of global whitefish production. This is exacerbated by the recent recommendation from the International Council for the Exploration of the Sea (ICES) and the Joint Russian-Norwegian Arctic Fisheries Working Group that the 2026 Barents Sea cod quota is cut to 21% less than in 2025. It is inevitable that prices will rise across all whitefish as all buyers seek out alternatives. There are a great number of options in the whitefish sphere, but any surge in demand for any one of these will create shortages and price increases. With fish and chips remaining a customer favourite in pubs, restaurants, leisure, education, healthcare, and hotels, we urge all customers to list on menus as “fish and chips”. Any commitment to a particular species in these volatile times means the potential of expensive menu re-writes and time-consuming front of house communication if your choice is impacted by supply shortages. An element of flexibility in the menu description means that we can substitute other species in such instances to ensure 100% order fulfilment.

It is worth, at this juncture, noting that we must all remember that circa 50% of fish is wild caught. As the world’s last great hunted resource this means that we are always at the behest of the weather, spawning and migratory patterns, and climate change. This is notwithstanding the impact of global politics which seems ever present. Some of the patterns we are seeing in the availability of wild fish are not always explainable. As an example, the invasion of octopus that we have seen this year in the Southwest has had a serious effect on the shellfish industry. With these cephalopods entering crab and lobster pots and consuming our native favourites, fishermen are hauling the pots and finding empty shells. Conversely, the major octopus fishing area of Morocco are seeing a severe decline, causing some to speculate that stocks have moved northwards. Add in the Marine Conservation Society advice to avoid octopus due to concerns over sustainability, and it’s a confusing landscape. It is impossible to legislate for these unpredictable factors in supply, and we take no pleasure in being unable to supply any product line. We must continue to diversify our tastes in fish to ensure the sustainability of stocks in the future. We continue to work on projects in the UK and globally to bring new developments and ideas to the table to combat these pressures.

We have enjoyed one of the driest summers on record. Whilst the lack of rain has not been good for our farmers, it has helped to drive customers into pubs, restaurants, and events for al fresco dining. To keep the momentum going, get in touch with your account manager for ideas to fill your autumn menus. It’s the ideal time for fish, and it is also worth starting to have those conversations around festive menus. If you are contemplating using some of our wild native species such as lemon sole, monkfish, turbot, or hake, you would be well advised to consider asking us to freeze down some volumes whilst the fish is abundant and competitively priced. Please also talk to us about our scallop medallions – a fantastic alternative to roeless scallops during this time of high prices (read on for more about that!).

Natalie Hudd, Director of Sales, Direct Seafoods.

Farmed Fish

Species	Comments
Sea Bass & Gilthead Bream	Sea bass and gilthead bream prices have reached record highs this year. A cold winter last year saw slow fish growth. This means that fish have been smaller than usual. Supply remains tight whilst demand is still strong. We are currently seeing that prices have stabilised, but at higher levels. New generation fish are due to become available in September, but there is no expectation of prices reducing. Bream prices, whilst high, are lower than sea bass, so may provide a better option. It is not expected that prices will rise above current levels, but we still expect the larger gradings to be short in supply.
Salmon	The recent tariffs imposed upon Norway by the USA of 15% could have far reaching effects on salmon prices. The USA is responsible for circa 25% of global farmed salmon demand. The increased tariffs could significantly soften this where Norwegian fish are concerned, whilst Scottish salmon with a lower 10% tariff will be in a stronger position in terms of export. Consequently, we could be enjoying lower salmon prices to the end of 2025. We have already seen strong biomass this year because of the vaccine against winter wounds. Whilst the volatility of the salmon market is well known, and the next algae bloom or jellyfish attack could be just around the corner, we would tentatively suggest that salmon should be an excellent choice for your autumn menu. Rich in omega 3 fatty acids and a firm favourite amongst customers, try marinating with Cajun spices, grill, and serve with lime yogurt.
Trout	There are no forecasted issues with any variations of trout for the autumn season. With a range of origins to choose from including Scottish loch reared, Norwegian sea reared, or ChalkStream® freshwater trout from Hampshire, provenance is a key selling point. Use large trout in any recipe where you would traditionally use salmon and see if you can convert your customers. Price is expected to be stable and reasonably priced.
Halibut	Farmed halibut prices are expected to be stable in the autumn season. Some of the farms close for maintenance during August, so should be back at full capacity for September. Halibut is rated a 2 by the Marine Conservation Society (MCS) so is a good choice for the sustainability conscious amongst you. This is converse to the wild fish which are red rated to avoid. Try serving with mushrooms and lemon butter sauce. A premium flat fish, but infinitely better value than wild turbot or brill which are the closest alternatives.
Other Farmed Species	There is lower biomass on the smaller 1-2kg and 2-3kg meagre. A rapidly growing farmed fish, meagre is subject to these fluctuations in available sizes. As the autumn season continues, we are expecting an improved picture across all gradings. In the interim you should expect some price volatility. Portion yields can be affected when the best gradings for these specifications are reduced in availability. Farmed turbot is readily available and should be a reliable choice, although prices are high. The wild turbot season did not materialise this summer, and this may be a reason why prices have held firm versus their farmed counterparts. Farmed halibut will be a better option in terms of price and portion yields if you are looking to place a premium flat fish at the heart of your menus.

Wild Fish

Species	Comments
Flat Fish	Flat fish are normally a sound choice during the autumn months. It is the last period before we see some species start to roe up ahead of their spawning season. Whilst demand for flat fish from processors for freezing is strong at this time of year, we would expect that most of our native fish will offer a good option – particularly as alternatives for under pressure white fish species. Faroese lemon soles and plaice usually appear on Grimsby market during the autumn, and this can ease back price averages. It is worth considering plaice as an additional option for your fish & chip offerings when we encounter supply issues on cod and haddock. Plaice was historically a popular option – particularly in the South of England – in fish and chip shops. Cornish soles, or megrim soles, should be abundant during the autumn months. A good opportunity to try this lesser-utilised species. Dover soles remain prohibitively expensive for the vast majority of menus, but the quality should be excellent. Smaller fish tend to present the best value. The usual season of abundant turbot has not materialised this summer. This has seen scarcity of fish and high prices. Brill have also reached prices at levels we have never seen before – likely in response to the lack of turbot. Both species are a stunning addition to any menu, but perhaps one for your specials boards if we see any significant landings.
White Fish	Scientists are recommending a 21% quota cut in Barents Sea cod in 2026. Whilst the haddock quota has been increased, experience tells us that any shift in species just moves the problem elsewhere. Even ahead of this potential cut, we have seen closures in various haddock fishing areas in Norway which has contributed to a lack of available product. We now await the start of the new Icelandic quota on the 1st of September. However, please be aware that it will take a matter of weeks for fish to start permeating the market. The shortage has been exacerbated by the Icelandic government closing their inshore fisheries for most of July and all of August. This meant that approximately 700 small boats stopped fishing immediately and reduced the volume available in these last weeks of the 2024/2025 quota. Those of you who contract prices with us over the year should expect these to be much higher in 2026 due to all the factors highlighted above and in the overview. The only solution is to implement some flexibility in the species you are prepared to use in your fish and chip dishes. Most of you will be aware that we frequently champion coley as an alternative. It is now being reported that there is growing interest in this species due to the rising costs we are seeing for more popular white fish choices. Prices for coley increased to an all-time record at the end of July / beginning of August. Already popular in France, Sweden, Norway and Germany, Norway are taking strides to market coley as an alternative to cod. Even though prices have recently been high, coley still represents a vastly more economical alternative than other more traditionally popular white fish. Hake has been holding at firm prices throughout spring and summer. We have seen some good landings in recent weeks so are hopeful that this will continue into the autumn. A firm favourite in the UK having only been popular on the continent 20 years ago. It shows that it is possible to change perception and diversity of tastes over time.
Round Fish	Good landings of monkfish are expected over the next three months before prices typically increase in December as monkfish assumes its position as a festive favourite. Whilst subject to some price fluctuations, monkfish presents a year-round quality option for any menu. Its versatility is unmatched. Talk to your account manager about various ideas including deep frying the cheeks and using in fritto misto, slicing and serving as ceviche, or cutting into chunks for a curry. Gurnard will be coming into season as we enter the autumn. Whilst the MCS still advise to avoid tub gurnards, there are origins of the red and grey varieties that can be used occasionally. Rather like brown crab meat, gurnard can be used to add a tremendous amount of flavour to soups and stews. Demand for mackerel for export remains extremely buoyant. Particularly for Asian countries such as South Korea and Japan where record prices are being paid. Iceland saw the highest prices ever recorded for frozen fish in July. The situation is exacerbated by tight quotas and reduced inventories. Whilst the summer season has seen prices ease back a little, we are not expecting levels to be the same as last year. If you are planning to use mackerel on your menu, autumn is the last real opportunity as we see quotas come to an end in November. With the downgraded MCS rating, please aim to source hook and line caught fish from the South-West as the most sustainable option. Sardines will become a little shorter in availability as we head into the latter part of autumn, with fewer day boat landings. Good quality frozen alternatives are available.
Cephalopods	There are no changes in the MCS ratings for squid, octopus, and cuttlefish. Whilst the South-West have seen an abundance of both octopus and squid this year, those of you who use the MCS ratings to dictate your menus should still not be buying these species. Our native squid comes into season when the waters cool, and we should see best quality. MSC certified alternatives to both octopus and squid are available. The octopus invasion is expected to finish once the waters cool.
Exotics	Both swordfish and tuna should represent sound choices for your autumn menus. Supply has been plentiful in the summer months. Although we will still be in the monsoon season during September, suppliers are forecasting price stability. Superfrozen tuna remains the only choice for sushi and sashimi applications as it complies with the requirements of raw, ready to eat (RRTE) products. We are now offering RRTE tuna portions that are MSC certified. Talk to your account manager for more details. Portions are available in 120g-150g, 150g-180g and 180g-210g.
Shellfish	The Canadian lobster season closed at the end of June. We are now on pounded stock until November. As a result, prices are expected to slowly increase. Demand will dictate how high or low the stock gets, and this will affect the price. Overall, the landings in the 2025 Canadian spring fishing season were down by 10-15% compared to the 2024 season. Stock levels should be supported by the continuation of our native lobster season if the waters stay warm – although if octopus continue to raid the lobster and crab pots, there could be higher prices sooner than we think! Mussels will be back in season in September and much welcomed. We champion this highly sustainable and cost-effective bivalve mollusc year after year. Versatility is key as mussels can be utilised across menus as a starter, main, garnish, or in pasta and stews. The MSC Poole clam fishery is in full swing, and reduced temperatures will improve the quality of the clams you buy. We expect prices to be stable and much lower than we saw back in the spring. Crab meat prices are expected to remain stable providing stocks have not been too extensively decimated by the octopus invasion! Our native UK scallops should be a good choice in the autumn season before the prices rise in December. However, the roeless scallops imported from the USA and Japan are a different picture. We are seeing rises in the price of scallops from Japan's top-producing regions, including the Sea of Okhotsk in Hokkaido. This is reversing the trend of decreases that was expected on the back of the USA tariff uncertainty. The increases are being driven by China agreeing to suspend its ban on Japanese seafoods imports. Additionally, USA scallop prices have moved higher as the season progresses, and buyers are moving towards more affordable and available smaller sizes. An ongoing shortage in availability, coupled with sustained demand, is having an impact on fresh, and frozen alternatives. Talk to your account manager about our brand new MSC certified scallop medallions. These are a fantastic alternative and will enable many of you to continue offering scallops on the menu whilst mitigating increases.

Smoked, Deli & Frozen Fish

Species	Comments
Deli	We forecast stability in our range of deli lines over the autumn. This includes our prawns and crayfish in brine, marinated anchovies, caviars, roes, and soups. We carry a range of ready-made soups including crab, lobster, and fish. Any one of these takes labour cost out of the kitchen and they really are fantastic products for an autumn starter or part of a fish soup or stew. An increase in logistic costs on the continent means we are expecting a small increase in our range of seaweeds. However, these are great in salads, soups, poke bowls, sushi and quiches, so make the most of this trend.

Smoked, Deli & Frozen Fish cont'd

Species	Comments
Smoked Fish	Smoked prices are driven by a combination of raw material price and processing costs. Given the current stability we are seeing in the salmon market, we believe that smoked salmon should be a great choice in the autumn. Smoked mackerel prices, on the other hand, present a challenge. With the global export demand for fresh, the smoked fish are on a seemingly unending trajectory. We don't recommend as a cost-effective menu choice, but a great way to make the most of this omega 3 packed oily fish is to make a smoked mackerel pâté and serve with crispbreads or toast. Due to the issues in the white fish market, we have seen some astronomical prices for smoked haddock in recent months. Our expectation is that we will see some easing in the autumn, so serve with a poached egg, hollandaise sauce, mustard mash, and wilted spinach for a winning dish.
Frozen Fish and Seafood	The demands on the white fish market are having an inevitable effect on IQF white fish fillets alongside breaded and battered value-added options. Prices keep rising and we don't expect any significant decreases in the short to medium term. The continued sanctions on fish of Russian origin are having far reaching effects across the market. Even pollock, which has been the more inexpensive white fish saviour in recent months, is starting to see price pressure. At the time of writing, we await the outcome of the meeting between US President Trump and Russian President Putin. This meeting will be vital for the potential end of the Ukraine war but will also have a significant effect on global whitefish trade. IQF sea bass prices have also risen off the back of the extensive increases we have seen in the fresh market. Frozen processed lobster prices are also on the rise due to the reduced landings this year. Prawn prices are, overall, stable. Warm water prawns should offer a good choice for your menus this autumn. Frozen scallop prices are on the increase as detailed above but ask your account manager about our alternative scallop medallions. The two main squid species we see in the frozen squid range are illex argentinus and todarodes pacificus. Argentina recorded its largest illex squid catch in nearly two decades this year. There is hope that this is a sign of oceanic recovery in the South Atlantic region. Conversely, it has been reported that there will be a possible early closure of the current loligo squid season. This is due to a sharp decline in biomass. It will be several months until we see any impact on prices from either of these situations.

Boom or bust for fishing industry as octopuses swarm in UK waters?

Source *(full article)*: news.sky.com

Regulators, fishers, academics and conservation bodies are trying to work out what has fuelled the "octopus bloom" in the South West, and whether the creatures are here to stay.

Fishers along England's southwest coast have noticed a boom in the numbers and size of common octopus in the last few months.

"As of February this year, there was just a massive explosion in the population of octopus," said Alan Steer, a crab fisher based in Devon.

"We went from catching nothing to catching 1,000 kilograms a day," with each cephalopod weighing between 2.5-3.5kg, he told Sky News.

Fish fingers like you've never seen them before

Source *(full article)*: fishfocus.co.uk

A pilot community project to create a new locally sourced fish finger for school lunches is making waves across Plymouth and beyond.

Known as the Plymouth Fish Finger, the project is making use of 'by-catch' fish (that which would otherwise go to waste) from local fishers, taste testing them with school children, and co-designing fish fingers, with a plan to serve them in school meals locally.

For species insights and menu inspiration contact your account manager.

Eat Scottish Mussels

Source *(full article)*: fishfocus.co.uk

The Eat Scottish Mussels campaign is reigniting national interest in one of Scotland's most sustainable and nutritious food sources. Developed by Kelly Wright, the Scottish Farmed Shellfish Brand Ambassador, the campaign aims to raise awareness and encourage greater consumption of Scottish farmed mussels, particularly among younger consumers and food conscious audiences.

The campaign is part of a wider initiative supported by the Association of Scottish Shellfish Growers, Scottish Shellfish Marketing Group, Associated Seafoods and Crown Estate Scotland.

Recipe Corner

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

- **Oven-baked halibut with apple butter sauce**
  Source (*full article*): fishfocus.co.uk
- **Risotto with prawns and mussels**
  Source (full article): fishfocus.co.uk
- **Pulled salmon with asian salad**
  Source (*full article*): fishfocus.co.uk

Please contact your local Direct Seafoods depot with any seafood queries, and for information on daily landings, new products or assistance with menu planning.

directseafoods.co.uk