

CATCH-UP

Summer 2025

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

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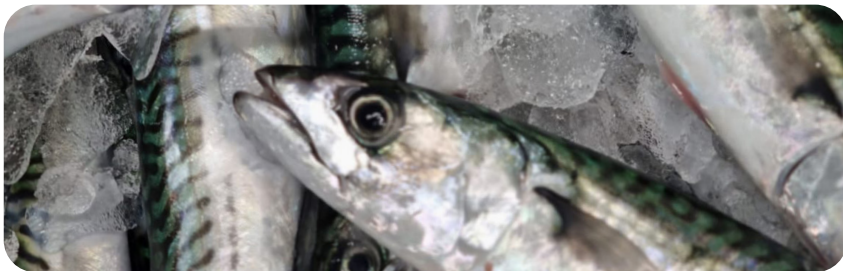
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Latest Good Fish ratings show mackerel in decline

Source (full article): fishfocus.co.uk

The Marine Conservation Society (MCS) have updated their Good Fish Guide in line with the latest scientific advice and mackerel ratings have dropped.

This spring's update to the Good Fish Guide sees Northeast Atlantic mackerel caught by midwater trawl move from a 3 to a 4, recommending that businesses do not source it. Mackerel caught in this way in the Northeast Atlantic makes up most of what supermarkets and restaurants sell. Mackerel caught in the Northeast Atlantic by hook and line, moves from a 2 to a 3, moving from green to amber.



More meagre on our plates!

Source (full article): fishfocus.co.uk

Argyrosomus regius, or better known as meagre, is a fish with great commercial potential due to its flesh quality, taste and fast growth in captivity.

This fish is less known than its counterparts, seabass and seabream. However, most recipes containing seabream and seabass can be easily prepared using meagre meat.

This fish is rich in omega-3 fatty acids, phosphorus, protein and vitamin D, and it has first-class white meat with a more neutral taste, which makes it more accepted by children.

UK and EU reach new 12-year post-Brexit 'reset' deal including EU fishing boat rights to UK waters

Source (full article): bbc.co.uk

A landmark deal has been struck between the UK and the European Union after both sides agreed a last minute breakthrough in Keir Starmer's Brexit reset talks.

The step forward came on Monday morning - hours before a major summit in London - after talks had gone "down to the wire" on Sunday.

BUYER RECOMMENDS...

Good picks this season include:

- Bluefin Tuna (UK)
- Ray Wings
(Cuckoo / Undulate / Thornback)
- Meagre
- Native Lobster
- Cornish Sole

New trial awards quota to fishers delivering sustainability and growth

Source (full article): fishfocus.co.uk

UK fishers demonstrating how they will deliver environmental, social, and economic benefits will be awarded with additional quota this week.

Following last year's successful pilot, the 2025 Quota Application Mechanism trial has been expanded to include English non-sectoral over-10-metre vessels alongside producer organisations with English members.



FISH MARKET REPORT

Summer 2025

OVERVIEW

Welcome to the summer 2025 newsletter, which aims to cover the June to August period for the supply of fresh and frozen fish and seafood. It's been a busy few months in our industry with lots of activity around the potential of the new USA tariffs and their impact on prices. We've also had a really difficult few months on our core cod and haddock species with key fishing areas closing, and new quotas affecting availability. This challenging scenario is set to continue with an ongoing desperate shortage and sky high prices, combined with mixed quality on haddock in particular. We are also starting to see the native lobster season kicking in, so get your specials boards ready for any UK landings. The weather in the UK has been extremely favourable during the spring. The continuation of this will encourage diners to get out for some al fresco dining, so talk to your account managers about the plethora of fish that should be landed into our native auctions over the summer.

Our Director of Sustainability, Laky Zervudachi, has thoroughly assessed the recent Marine Conservation Society (MCS) spring 2025 ratings. This update has sprung a couple of significant surprises. The most important of which is the downgrading of most UK (and European) mackerel fisheries from a 3 yellow to a 4 orange rating. This is essentially a political move that has been prompted by the fact that the Nations (Iceland, Norway, EU and UK) who share the scientifically suggested TAC (Total allowable Catch) have, over the last few years, persistently exceeded the recommended landings, and are now in danger of seriously compromising mackerel stocks in the North East Atlantic. Mackerel continues to be the most valuable stock to the UK and is mostly landed by massive pelagic trawlers in the North Sea around Scotland, with huge amounts frozen down and sold for export or smoking. Mackerel was once seen as the great sustainable alternative species that all chefs should be using, but the constant abuse of the TAC's by the relevant fishing nations is now endangering this great value species that is also wonderfully versatile for chefs as well as being great for health with its high levels of Omega fatty acids. Fortunately Direct Seafoods will continue to source hook and line caught mackerel from various UK fisheries, that, due to this more selective fishing method, still carries a 3 rating. Please speak to your depot regarding local landings. Please also note that gill netted mackerel from the South West is now 5 rated – so one to avoid.

On the more upbeat side of the coin, Scottish monkfish, both black bellied and white bellied, have been upgraded from a 4 rating to a 2 rating which is great news for many chefs who love to use this versatile premium species. It is also worth noting is that there are now a number of species of ray that are achieving 2-3 ratings (namely, cuckoo ray, undulated ray and thornback ray). Though depots and chefs will need to check specifically with which areas these species are fished and by what method, it does mean that there is now the opportunity to add skate/ray back on menus as most of these slow growing species have been red rated for many years

Finally it is worth mentioning, as we approach the summer, that the UK Bluefin tuna season will start again in July until December. This year the quota for commercial fisheries will be for 45MTonnes, and licenses will be given to 15 UK fishermen with vessels under 12 meters who are only allowed to fish with rod and reel. These beautiful fish have a 3 rating and are making more and more appearances in UK waters. Do speak to your account manager if they are of interest as many of these fish will be landed in the South West where our Brixham buyer will have direct access to these 3 rated specimens.

So with all this considered, lobsters, Bluefin tuna, monkfish and ray wings should all be top of your list for a sustainable and delightfully British fish menu in the summer months.

Natalie Hudd, Director of Sales, Direct Seafoods.

FARMED FISH

Species	Comments
Sea Bass & Gilthead Bream	Our expectation of increases in the Spring Catch Up has come to fruition with more severity than we predicted. This is a scenario that is anticipated to continue for some time, with sea bass the most severely affected. Producers say that availability for the largest size will be the worst hit, but that all sizes are affected. Farmers suffered high mortality of fish last year because of rising sea temperatures. The industry is also facing rising production costs. On top of this, there have been fewer fish put into the water this year because of the low market prices achieved last year. Our producer has indicated between 12-18 months of prices staying high. Prices are not expected to lower significantly this year. Heightened demand from the continent over the summer season will exacerbate this. There is a significant shortage. One to avoid. As a guide, 600-800g bass prices have jumped by circa 25% since the beginning of March. Bream is the better choice if you do decide to list one of these species on your summer menu.
Salmon	Salmon prices have been harder to predict than usual in 2025. Whilst the farmers have been talking up the prices since January, the new vaccine against winter wounds, combined with warmer water temperatures, has seen biomass improve and prices struggle to reach the highs of the prior three years. As we head into the summer months, the usual levelling out is expected. For once, we can recommend that salmon should be a good choice for your menus in forthcoming months. The mooted USA tariffs against Norway, and the resulting potential for reduced demand, have also contributed to making this a more economical choice this season.
Trout	Larger trout (ChalkStream® and sea reared varieties) are typically seen as a very useful alternative to salmon. During summer months, the price differential is much less significant. This offers operators the ability to switch between the species depending on requirements. The ChalkStream® clearly offers great provenance – particularly for operators in the South of the UK. Sea reared is a little closer to salmon and Scottish provenance is available. All we know is that the appetite for salmon appears to be insatiable. Why not create demand for both salmon and trout and educate the consumer as to the feasibility of trout throughout menus – be that pan fried, grilled, oven baked, or served as a trout tartare with avocado – a perfect summer dish.
Halibut	Farmed halibut prices have been stable of late. We expect this to continue in the early part of summer. However, please be prepared for some farms to close down for maintenance during August. This can create some shortages. Farmed halibut continue to attract an MCS 2 rating, so offer a premium and sustainable menu choice.
Other Farmed Species	Featured in our selection of news stories in this issue, meagre will offer a good alternative to both sea bass and gilthead bream. Meagre is more resilient to warmer water temperatures which offers an advantage against sea bass. Bass suffered high mortalities as a result of higher water temperatures last year. The rapid growth of meagre is also associated with a lower carbon footprint because less energy is needed to produce the fish. This means that the environmental impact of farming meagre is lower than farming gilthead bream and sea bass. A good choice for a summer menu, be that grilled, fried, baked or steamed. One of the key turbot farmers have recently made history by becoming the only one in the world to achieve Aquaculture Stewardship Council (ASC) certification for all its farms. Watch this space for ASC certified fish availability. In the meantime, the price should be stable and farmed turbot still attracts an MCS 2 rating.

WILD FISH

Species	Comments
Flat Fish	Summer sees our native flat fish returning to prime quality. Lemon soles are in season with Cornish fish being at their best from July onwards. Icelandic landings should improve and this should help to lower the average paid for native fish. Plaice are now fully in season and will be a good choice throughout the summer – particularly fish that are bottom trawled from the North Sea as these attract an MCS 2 rating. Megrims (or “Cornish sole”) are now at their best. Talk to your account manager about adding these to your menu for an economical and lesser-utilised species. Try pan frying and serving with bacon, fennel and cockles. Alternatively, witch soles (or Torbay sole) also offer a cheaper flat fish that is in season during the summer. Dover soles will have moved back offshore now that their spawning season has finished. This means that they will be scarcer and prices are likely to rise – although quality should be excellent. Turbot and brill are now in season, and we should see much improved landings throughout the summer - offering the potential of some deals for the specials board.
White Fish	Cod and haddock prices have been extremely volatile throughout the spring. We have seen key fishing areas closed for both species. This, in addition to spawning haddocks and severely reduced cod quotas, has seen prices reach astronomical levels. The ongoing challenge with quota is setting prices at new levels that are not expected to reduce significantly in the short to medium term. There has been a serious haddock shortage which is seeing virtually no fish coming out of Norway. This means we are reliant on either Scottish fish (prohibitively expensive) or Icelandic fish. There is very little Icelandic quota left. The shortage means that we are also seeing more quality issues with the fish as merchants are desperate to pick up any available stock. Many Icelandic boats will tie up towards the end of July as quota comes to an end. This may also create some scarcity until new quota begins on the 1st of September. Coley prices have risen in recent weeks – most likely in response to other key white fish lines increasing, combined with a rise in export demand. However, this still remains a very cost effective option. If you don't want to make it the star in a dish, consider using in fish cakes, pies or cut into goujons and battered or breaded. Whilst hake availability and pricing has been stable, we have not seen many landings of cheap fish through the spring, and indications are that prices will remain at these levels throughout the summer. The ever increasing popularity of hake in the UK, combined with continued demand from the continent and rising prices on other core white fish species means that hake now sits at the more premium end of the range.
Round Fish	As we head into June, the average mix of South coast monkfish landings increase versus Scottish landings. This raises the average cost as we purchase more South Coast trimmed tails at higher prices. There should be good availability for monkfish throughout the summer, but strong export demand from the continent over the holiday season should keep prices reasonably buoyant. Gurnard are now out of season and should be avoided until the autumn. Further to the overview, there are many challenges in the sourcing of mackerel currently. There are several issues at play. Reduced quotas and strong demand from Asia and mainland Europe has seen an almost 10% increase in whole fish costs being landed into the UK. Couple this with the downgrade of MCS rating, and we cannot wholeheartedly recommend this classic summer species this season. If you do want to put mackerel on the menu, choose hook and line caught fish from the South West. Be prepared to pay a premium however. Sardines should also start to make a showing around our native coastline during the summer, but probably a better choice from late July onwards. Further to the changes in MCS ratings, it is worth considering cuckoo, thornback or undulate rays for your specials menus – given the improved MCS ratings. Serve with lemon butter, caper and parsley sauce for a truly classic dish. The UK Bluefin tuna season will start again in July. Caught by rod and reel, this is too good an opportunity to have local tuna on your menu. MCS 3 rated, the opportunities on a summer menu are endless.
Cephalopods	Whilst there seems to be an abundance of cephalopods in our UK waters going by landings, a lack of data means that octopus, squid and cuttlefish are rated poorly (MCS 4 at best). We continue to have MSC certified alternatives to squid and octopus for your consideration.
Exotics	We are entering a period of changeable weather in key swordfish and tuna fishing regions which can affect fishing effort. In Sri Lanka, as an example, the more severe “Yala” monsoon brings rain from now to September. In addition to this, European summer gets into full swing and we expect to see increased demand as a result. We expect some price inflation on these lines. Sticking to the superfrozen tuna will negate any price fluctuations, and is more suitable for a wider range of menu applications.
Shellfish	Both Canadian and Native lobster season will be in full swing. This should see prices reducing and the opportunity to list on your menus. Please do consider, however, that native lobster gradings can be less consistent than their Canadian counterparts. As such, if you are forecasting any significant usage, a willingness to take more than one size is immensely helpful in ensuring we can fulfil your orders. In our spring catch up, we alluded to the fact that landings of USA roeless scallops are significantly down on prior year and it was affecting container prices. The situation has got worse and each container is more expensive than the last. Canada has reduced their scallop quota by almost 40%, and the USA has reduced their quota by almost 30% (on top of consecutive quota cuts of the last 4 years). Demand remains strong and supply is not sufficient. Prices are forecast to continue to rise. UK scallops spawn in the warmer months, so you may find that the quality is not so good, although prices are anticipated to be reasonably stable. It's not a great time for bivalve molluscs. Mussels are definitely one to avoid – particularly with the warm weather we have been experiencing. The MSC clam season will be underway in the summer, and this should see prices reduce as the pump scoop dredges are employed. Brown shrimp price rises have gone beyond estimated levels without warning. The catch volumes have been very low and there is far more demand than availability. One to avoid for now. Crab meat prices should be stable throughout the summer. Sustainability concerns remain, but our producer remains proactive in this area to combat the issues. For those of you not bound by the MCS ratings, crab is superb on a summer menu. Be that crab cakes, crab tian, dressed crab or crab linguine.

SMOKED, DELI & FROZEN FISH

Species	Comments
Smoked Fish	Smoked salmon prices are expected to level out along with the fresh, and this opens the door to listing all the wonderful cures available to really spice up your menus during the summer. A season where the customer is traditionally looking for a lighter bite, smoked salmon and hot smoked salmon are eternally popular. Contact your account manager if you need a refresh on some of the different cures we have available. Smoked mackerel remains expensive due to the various issues in the mackerel industry, but is definitely a menu favourite at this time of year. We expect the larger sizes of haddock to reduce as we head into the summer (340g +), so smoked haddock prices should reduce in tangent with this.
Deli	Most of our deli lines are forecast to be stable in price. Consider using our range of caviars and roes as accompaniments to canapés or lighter bites, whilst prawns and crayfish in brine, and anchovies and sardines in oil are ideal to use in salads or as part of a Mediterranean themed menu.
Frozen Fish and Seafood	The turbulence in the white fish market has had significant effects on the frozen market in recent months. Pollock is now the only affordable whitefish in our frozen range. IQF cod is continuing its rapid rise and IQF haddock is not immune – although to a lesser extent. The increased tariffs that the USA have imposed on China could be a positive factor for UK pricing in the future, but for now fish availability is very short. IQF hake is also increasing. The new season has seen poor catches and this means that prices will rise. Most other frozen lines are stable, although we have seen some marginal increases in warmwater prawns as a result of US demand. Frozen bass prices are mirroring the fresh market and are very high.

BBC Countryfile captures moment of connection as young rays are released into Plymouth sound

Source (full article): fishfocus.co.uk

The event marks a key moment in the Little Rays of Hope project - a collaborative initiative from the Marine Biological Association (MBA) and Plymouth Sound National Marine Park, supported through the Nature Boost Programme and funded by The National Lottery Heritage Fund.

The Little Rays of Hope project aims to provide opportunities for local people to engage with these species, to learn about them, and to explore the possibility of using their spot patterns for identification, which avoids the need for tagging.

UK salmon sales soar

Source (full article): fishfocus.co.uk

UK's Favourite Fish Hits £1.5bn in Sales Amid Soaring Demand at Home and Abroad

Salmon has kept its crown as the UK's favourite fish, with new figures revealing sales rose to £1.5 billion last year amid continued strong demand.

Sales leapt by 5.5 per cent in the 12 months to December, accounting for nearly a third of all fish sales in the UK.

The year-on-year growth for salmon outpaced the 2.9 per cent rise recorded across the wider fish category.



Cuttlefish plan launched

Source (full article): fishfocus.co.uk

An action plan to support the cuttlefish fishery in English waters has been launched by the Marine Management Organisation (MMO), following engagement with stakeholders.

Cuttlefish is critical to the businesses of fishers working in ICES areas 7d and 7e, and there are concerns that stock levels are at risk of being over exploited.



For species insights and menu inspiration contact your account manager.

Fisheries team takes action to protect endangered european eels

Source (full article): fishfocus.co.uk

The Environment Agency's Fisheries Enforcement Officers have started patrols along the coast to help protect the endangered European eel from illegal poaching.

The Environment Agency's Fisheries Enforcement Officers have started patrols along the Morecambe Bay and North Lancashire coastlines to help protect the critically endangered European eel from illegal poaching.

There has been a 95% decline in the number of European eels returning to rivers across the continent since the 1980s.

Young eels, known as elvers, are highly prized on the black market, attracting the attention of illegal poachers who often have links to organised crime gangs.

Recipe Corner

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

One-pan roast British trout fillets with asparagus and cherry tomatoes

Source (full article): fishfocus.co.uk

Tacos with prawns

Source (full article): fishfocus.co.uk

Pan-fried turbot with soy and hazelnut gravy

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.

campbellbrothers.co.uk