

CATCH-UP SUMMER 2021



directseafoods.co.uk

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

Salmon industry making major sustainability strides

Source (full article): fishfarmermagazine.com

THE farmed salmon industry has emerged as one of the most environmentally conscious and sustainable food production methods in the world, a new report finds.

The Global Salmon Initiative (GSI) has just published its Annual Sustainability Report, providing eight years of data across 14 key indicators – 10 environmental and four social – and it paints a highly encouraging picture.

The GSI is a CEO-led initiative of 13 salmon farming companies, representing 40% of the global salmon production industry with all members fully committed to showing measurable progress in the sustainability of their operations through greater collaboration, transparency and innovation.



BUYER RECOMMENDS...

Good picks this season include:

- **Mackerel**
- **Sardines**
- **Plaice**
- **Swordfish**
- **Coley**

SOCIAL CATCH-UP...

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MSC Seaspiracy Response

Source (full article): fishfocus.co.uk

MSC Seaspiracy Response – Sustainable fishing does exist and helps protect our oceans.

The Seaspiracy film on Netflix raises a wide range of issues relating to our oceans, including questioning the credibility of the sustainable seafood movement and in particular, our organisation, the Marine Stewardship Council. While we agree more attention needs to be given to the crisis of overfishing, we do want to set the record straight on some of the misleading claims in the film.



We must protect our oceans

Source (full article): fishfocus.co.uk

We must protect our oceans – but giving up seafood is not the solution.

There's no doubt Netflix's most recent documentary about oceans, Seaspiracy, has caused quite a stir. But, it is great that the role of seafood in the future of food-debate and health of our oceans are being talked about outside of the fish pond.

"It is just a shame the programme's "solution" to save our oceans is to give up seafood all together. That is the last thing we should do – the world needs more food from the ocean, not less," says Renate Larsen, CEO of the Norwegian Seafood Council.

"The public outcry caused by the documentary is very understandable. Many of the issues highlighted in the documentary are totally unacceptable and requires debate and devoted focus by leaders at the highest level. Unfortunately, the programme uses outdated facts and paints a one-sided picture of an incredibly diverse industry where there are both good and bad players," says Larsen.

FISH MARKET REPORT Summer 2021

OVERVIEW

So here we are – more than a year after the first lockdown – and all hoping beyond hope that we won't see any more being imposed in our lifetimes.

We would firstly like to take this opportunity to welcome you all back and wish you the very best in re-mobilising your businesses. It is so difficult for all of us in these early stages of hospitality becoming operational, but know that we are doing our best to support you. Please also know that every bit of advanced warning you can offer of your requirements helps us immeasurably. We face a very different landscape to the one we left in early 2020. Understanding what to buy and how much remains a challenge. In time, however, this will settle and we look forward to some sense of normality.

There is some residual uncertainty as a result of Brexit. We are still learning where this is concerned. It was originally planned that, from April 2021, some 'controlled goods' entering into the UK (like animal, fishery and plant products) would be subject to additional controls. For example, export health certificates, import pre-notifications and physical, documentary and identity checks, followed by some further changes to the customs declaration process in July that businesses would need to implement. This was likely to cause some availability challenges with increasing demand as restrictions are lifted. Fortunately, the UK Government have now issued advice that these additional controls will now be delayed. Some will now be implemented in October, and some have been delayed to early 2022. Rest assured that we are keeping abreast of the changes and ensuring that we are well prepared in order to minimise disruption.

Some of you will have no doubt seen the recent "Seaspiracy" Netflix docu-drama during the last period of lockdown. We have had a number of enquiries as a result of the release of this film, and I am sure that those of you have seen it will have questions. There is no doubt that it has grabbed the imagination and hearts of millions around the world with its often shocking, and shaming, depiction of the seafood industry. Whilst it is unfortunately true that some of the issues portrayed are in urgent need of improvement, the film studiously avoids mentioning all the good work that is being undertaken around the world by governments, NGOs and indeed the industry itself. This includes fishermen, producers, retailers and suppliers. This work is being undertaken to improve fisheries and to make our oceans more sustainable, whilst ensuring that the lives of the millions who depend on seafood for both nutrition and livelihoods is maintained. You can read our full statement on this on our website <https://www.directseafoods.co.uk/latest/direct-seafoods-response-seaspiracy/>. Please do come to us if you have any concerns, but know that we work tirelessly to ensure that the seafood we supply is responsibly sourced. The answer is not to stop eating fish, but to continue to ask questions of the supply chain and to encourage the use of certified species. We have paid particular attention in this report to some of the MCS (Marine Conservation Society) ratings to help you make sustainable choices.

Onto the summer months! Summer can be tricky for some fish and good for others. Whilst the weather we are experiencing in May is certainly not conjuring up images of barbecues and al fresco dining, we can but dream. For the purposes of this report, we are going to assume that the better weather is on the way and that summer fish like mackerel and sardines from the south west will make your menus. We should start to see good showings of these at the end of July and into August. We also look forward to the native lobster season where there will hopefully be some bargains to be had. Let's be honest, I think we all deserve some stunning local lobster after the year we've had! Expect some great quality flat fish in native lemon soles, plaice and megrims. Also, look out for bargains on hake as there may be some decent landings depending on the weather. We are seeing a tremendous amount of volatility in salmon pricing (for a change) as farmers desperately try to recoup losses of the last 12 months on the back of increased demand. We hope to see some relaxing of pricing as we head into July & August.

Wishing you all a fantastic and prosperous summer season!

Natalie Hudd, Director of Sales, Direct Seafoods.

FARMED FISH

Species	Comments
Sea Bass & Gilthead Bream	Bass and bream prices have remained surprisingly firm in 2021. We are currently using 2019/2020 generation fish. As a result the smaller sizes are running short as we wait for the 2020/2021 generation fish to grow to the required sizes. We don't expect shortages, but the prices may stay a little firmer than usual at this time of year. That being said, either species offer great value on most menus and usually prove to be extremely popular. Our sea bass and gilthead bream are farmed to Global G.A.P standards, and the vast majority is also ASC certified. This makes them a responsible choice, in addition to being healthy and good value. You cannot go wrong with a light and refreshing sea bass or gilthead bream ceviche dish on your menu.
Salmon & Trout	<p>In recent weeks, salmon prices have shot up due to a combination of holidays, less harvesting and producers stocking a new generation of fish. Prices hit a level that we have not seen since before the global pandemic. Salmon prices have moved up and down considerably this year. It's hard to tell whether this is just due to the uncertainty of trade, or whether it will be more sustained. We would typically expect salmon prices to ease as we head into July and August, but this is not a typical year. Stay in contact with your account manager over price movements. Seek an alternative if you are looking for stability as we expect price fluctuations to continue.</p> <p>UK trout remains a sound option with stable pricing and more reliable local supplies. The UK farmed we stock will either be the larger fish from ChalkStream®, or smaller fish farmed in Wiltshire. We also have sea reared trout available. This is currently predominantly from Scotland, but there is some Norwegian Fjord trout available. Sea reared trout is another great alternative for salmon – although the price tends to track at a similar level as it is a natural first choice alternative.</p>
Halibut	Farmed halibut remains a good choice for a premium slot on your menu. All wild sources continue to be rated a 5 (fish to avoid) by the Marine Conservation Society so farmed Atlantic halibut is the only ethical choice. For a super sustainable halibut option, try Gigha halibut from Scotland which are farmed in closed recirculatory systems and are rated a 1 (best choice). Price and availability should be stable until August when some farms close down for maintenance. There may be some tightening of supply around this time.

FARMED FISH cont

Species	Comments
Other Farmed Species	Farmed turbot prices have crept up due to low volumes being imported from Spain which creates an increase in import costs. This has been an issue with a number of imported lines. As volume demand returns, this should settle, and these fish will be a good option with good sustainability credentials. Where farmed meagre is concerned, the lack of demand through lockdown has meant that the fish have continued to grow, and there is greater availability on the larger 3k+ fish. Whilst there are potential shortages on the smaller sizes, prices should remain quite stable. Our meagre are rated a 3 by the Marine Conservation Society as they are certified to Global G.A.P standards. A good value fish, it's worth considering buying the larger sizes and cutting the fillets into thick cut supremes. A premium look without the price tag. We often recommend meagre as an alternative to wild bass as it works very well in similar dishes. Farmed soles are also available but we do have difficulties in achieving the volume requirement needed to regularly import. With dover soles likely to increase in price, it might be worth talking to your account manager about this option.

WILD FISH

Species	Comments
Flat Fish	Plaice is back in season and will be until December. There is plenty of plaice from UK waters with good sustainability credentials so this is an excellent choice. Friday the 4th of June is National Fish and Chip day, so it's worth utilising some of our flat white fish species as a change to the usual cod and haddock. Lemon sole should also be in prime condition. It's hard to know how firm prices will be on these species as we have not yet been able to fully gauge the strength of the European export market, but if you are looking for fish that are in season and good quality, you won't go wrong with either. Dover sole prices are expected to rise exorbitantly in line with historical trends as the fish move offshore and become more scarce. Not a great choice at this time of year if you are looking for economically priced options. We are expecting good landings of both brill and turbot in the South West. Prices tend to ease as we get into the summer months so these could be great occasional options for the specials board.
White Fish	With National Fish and Chip day on Friday the 4th of June, there are plenty of white fish to choose from. Unfortunately we do tend to see a deterioration in availability and quality of haddock in particular as we go further into the summer season. Haddock goes soft in the summer and can be very expensive. Line caught fish (which are better quality) carry a premium. We will also see Icelandic boats tie up at the end of the yearly quotas in July affecting both species. Advice would be to utilise cod and haddock in the short term, but think about alternatives to switch to as we get into July and thereafter until new quota begins in September. Hake has been very expensive in May and in really short supply. Historically we would see improvements in both price and availability in the summer months and are very much hoping for the same in 2021. As a member of the cod family, hake is a stunning substitute to either cod or haddock – portioned, battered and served with chips. Our reliable friend the coley, who we shamelessly seem to promote every month, will also be a good choice. Coley is not affected by spawning seasons like cod or haddock, so is a reliable option with a lower price point. Most sources are also rated 1 or 2 by the Marine Conservation Society - so a good sustainable choice. Pollock will be in its prime and line caught fish will be exceptional quality. However, this is one for the specials board as it can be hit and miss in terms of availability and gradings.
Round Fish	Summer is the season for round oily fish. Mackerel and sardines are all likely to be in abundance and great quality – particularly as we get into the latter part of the summer. All mackerel is currently rated 1-2 by the MCS, and sardines are generally 2-3. Either fish are great when grilled or barbecued due to the charred quality that can be achieved. There are so many summer recipes for these fish – whether pickled, served in a salad, or even by creating your own mackerel pâté. Sitting at the lower end of the price range, these fish can occupy a lower priced slot in the menu – either as a starter or a main. This offers the opportunity to list other more premium fish lines and therefore a good range of options for the customer. We will start to see showings of red mullet in the south west as we head towards August. A stunning, but delicate, fish – the mixed sustainability ratings of red mullet mean that this is one to be used occasionally only. Gurnards are not a recommended choice this time of year as they are in their spawning season (April to August). They are an autumn / winter fish and should be avoided. Monkfish should be stable in price and available throughout the summer. There are now 3 fishing areas in the south west that have been rated a 2 by the MCS – a good sustainable choice. A fabulous versatile fish.
Cephalopods	There are sustainability concerns about both cuttlefish and octopus. Both species are predominantly rated a 4 or 5. If you are going to use cuttlefish, aim to use fish caught in traps or by hook and line. The MCS current advice is to avoid all octopus from British waters. Native squid is a marginally better picture from a sustainability point of view, but summer is not the season for squid as they travel to deeper waters after spawning and reappear later in the year. In short – avoid the cephalopods unless frozen!!
Exotics	Tuna and swordfish supplies are expected to be reasonably steady. That being said, we are currently encountering some issues due to the low volume requirement increasing import costs. Rather like other imported lines, we should see costs reduce as demand increases. Chilean swordfish will remain in season until at least the end of September, so this should help stability of supply on this species throughout the summer season. The biggest factor we need to consider over the summer is the monsoon period which dominates the Indian ocean at this time of year. This does have the potential of causing delays and supply shortages over the summer and should be considered when adding tuna, in particular, to the menu.
Shellfish	Mussels are now out of season. There will be some around, but please be aware that quality will not be at its best and they will not be as robust as they are in the summer months. There are good frozen alternatives you can use for more consistency. Native oysters are now out of season until September at the earliest, but rock oysters will still be available for those who want a summer oyster fix. Native lobsters should be in full swing throughout the summer season. They were a little hit and miss last year, but we are hoping for better in 2021. They should hit price points that will make the smaller 450-550g size affordable for most as a special. Canadian lobsters should also start to reduce in price as their season is underway and as demand makes imports more affordable. We have seen live and dipped langoustines increase in price as the export demand from Spain has resumed. There will be fish around, but you may need deep pockets! The MSC certified clam and cockle fishery in Poole is now operational and will be until December. Like mussels, they can be a little weaker in the warmer weather so something to consider. UK Devon crab should be plentiful, but have been downrated to from a 2 to a 3 by the MCS. Use occasionally.

SMOKED, DELI & FROZEN FISH

Species	Comments
Smoked Fish	Smoked salmon, with all the weird and wonderful cures available, is always a popular choice in the summer months. Particularly for any larger events if these are allowed to go ahead this year. The expectation is that smoked salmon prices will follow fresh. This means that smoked salmon increases are likely in June, but we hope these will ease as we go through the summer into August. The most similar alternatives would be cold smoked ChalkStream® trout or cold smoked sea reared trout. However, the reality is that the price of smoked salmon is unlikely to be so severe that these options suddenly become much more cost effective. Do talk to your account managers about some of the different cures available that may help differentiate the smoked salmon on the menu and make the price point easier to work with. It is worth considering some hot smoked options. We do offer hot smoked salmon flakes which can be a great cost effective option to put in a salad. Similarly, the smaller fillets of hot smoked rainbow trout are quite cost effective and can be utilised well as a starter. Smoked haddock may get more expensive later in the summer season given the typical trend of haddock deteriorating in quality. There is always frozen smoked haddock as an alternative should this become an issue. Given mackerel's position as a great summer fish, smoked or peppered fillets would also be a recommendation for the summer season.

Disclaimer - the market report is a guide using information from our buyers who have a wealth of experience. Other influences still effect greatly the market place, weather, seasonal changes, supply and demand in retail and catering alongside exchanges rates.

SMOKED, DELI & FROZEN FISH cont

Species	Comments
Deli	Some deli lines will be subject to the change in rules of origin detailed in the frozen section below. At the moment, we have not yet seen such changes, but there is the potential of this affecting lines such as seafood salad in the future. However, as things stand, most deli lines are still stable in price and availability. Many of the deli lines we offer work well in summer dishes. These include our crayfish in brine and prawns in brine – either of which work well in salads or prawn / crayfish cocktails. Of course we also have our tubs of anchovies in oil which can be used in a myriad of summer dishes.
Frozen Fish	For a number of our frozen lines, lack of trade over the last 12 months has meant that stocks have not moved. However, since hospitality has reopened, certain lines have moved far quicker than we could have anticipated. We do ask for understanding when we are trying to replenish some of these frozen stocks. We will always do our best to ensure availability, but the current situation has been impossible to predict. Frozen pollock is proving particularly challenging in the UK at the moment. China closed their main port (Dalian) for their raw material supply from Russia due to Covid risk on packaging for a significant period. When it did re-open, there was a lack of appetite to import Pollock into the UK due to the uncertainty over demand. There are now low stock levels in the UK and in China. We don't expect this to resolve for at least 3 months. We are holding reasonable stocks on 170-200g pollock fillets only. The other issue we are navigating at the moment is a change in rules of origin since we left the EU. There will be certain products that will incur duties that did not before. The agreement reached has changed the rule book on when something changes origin. Any seafood product that has been historically imported into the EU from outside the EU would become of EU origin if the EU cooks, treats or changes the product. Under new regulations, the origin country remains as such – regardless of any subsequent processing. This means products such as some cooked warm water prawns, octopus and seafood mix will now attract duties as their origin countries are not the EU.

Lobster hatchery beats target by nearly three months

Source (full article): fishfarmermagazine.com
Orkney Shellfish Hatchery (OSH) has announced the successful hatching of its first run of European clawed lobsters for 2021, almost three months earlier than initially expected. The land-based hatchery is raising lobsters to help replenish wild stocks.

The hatchery, part of the Cadman Capital Group's Aquaculture portfolio, announced its plans to trial on-land production for lobsters in September last year, and said at the time that it expected the pilot run would complete around May 2021.

Additional love seafood marketing activity to be delivered by Seafish

Source (full article): fishfocus.co.uk
Seafood businesses encouraged to support campaign featuring species caught by UK fishing fleet at crucial time for industry.

Seafish, the public body that supports the UK seafood industry, has announced it will deliver additional Love Seafood campaign activity this spring, featuring UK fish and shellfish. Love Seafood is a 20-year initiative to shift seafood consumption levels in the UK, and over time will feature many different species and product types as it seeks to change attitudes.

The past year has been challenging for many seafood businesses as they faced the impacts of the global Covid-19 pandemic. Despite significant setbacks in 2020, caused by the pandemic, retail continues to perform well.

The world needs more food from the ocean

Source (full article): fishfocus.co.uk
The world needs more food from the ocean. The goal, as part of Mowi's mission to lead the Blue Revolution, is to sustainably produce more food from the ocean to feed a growing world population.

Mowi believes that producing more food from the ocean is an integral part of dealing with major challenges faced by humanity, such as food security and climate change. Salmon is farmed with a low carbon footprint, space for farming in the ocean is plentiful, and as far as animal protein goes – it's about as healthy as it gets. By producing food at a sustainable scale, there is every opportunity to position the aquaculture industry in the driver's seat to tackle global challenges – this is at the very core of Mowi's vision of Leading the Blue Revolution.



We believe good sourcing is the driving force of good supply. Please contact our local teams who are here to help you make the most sustainable seafood choices for your menus.

UK waters are home again to the Bluefin Tuna

Source (full article): fishfocus.co.uk

Marine scientists in the UK and Ireland have analysed multiple datasets, spanning a 16-year period, to document the increase in bluefin, which arrive into the waters of the Celtic Seas and off SW England, the Scilly Isles, and NW Ireland to feed in late summer and autumn.

The research is part of the and Defra-funded 'Thunnus UK' research project. Thunnus UK was established to improve knowledge of this species, as an essential first step in ensuring a positive future for Atlantic bluefin tuna around the UK.

Norway Cod and Haddock certification status update

Source (full article): fishfocus.co.uk

Inshore and offshore North East Arctic cod catch remains MSC certified until further notice and maximum 6 more months.

- Offshore North East Arctic haddock has a new MSC certification
- Inshore North East Arctic haddock no longer MSC certified

Planned changes to the MSC certification of North East Arctic haddock caught by Norwegian fishery, Norges Fiskarlag, came into effect on 26th of April 2021, while its North East Arctic cod certification has been temporarily extended up to maximum 6 more months, the Marine Stewardship Council has confirmed.

UK prawn farmer goes into administration

Source (full article): fishfarmermagazine.com

The pioneering company has blamed a fall in demand caused by the closure of restaurants during the long coronavirus lockdowns. Around 18 jobs at the company will be lost.

It opened two years ago in the Scottish village of Balforn in Stirlingshire with a plan to harvest up to a million Litopenaeus vannamei (Pacific whiteleg shrimp) prawns in the first few months of operation. Great British Prawns was also a leader in its field through developing aquaculture technology and sustainable energy will produce warm water king prawns in clear and clean water. Up to that point king prawns came mainly from Asia and Central America.

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