

Weekly Report

#Week 08

National Fish Observatory





INTRODUCTION

In this edition, we present the weekly price analysis of Salmon, Cod, and Tilapia, based on daily monitoring conducted across **105 cities, 20 states, and all 5 regions** of the country.

The analytical database brings together more than 650,000 records collected directly at the digital point of sale, enabling structured comparisons with the previous week and the identification of actual market movements, rather than merely isolated price fluctuations.

The Brazilian food retail sector operates in an environment characterized by high regional fragmentation, multiple store formats, and increasing sensitivity to price, assortment, and positioning. In this context, isolated national averages no longer accurately capture competitive dynamics. Dispersion, assortment density, price range, and localized variations become variables as relevant as the median.

The National Fish Observatory was developed to transform fragmented data into actionable commercial intelligence. Through a granular and structured approach, we generate evidence on price formation, regional behavior, tactical adjustments, and strategic repositioning, insights that directly impact margins, market coverage, and competitiveness in Brazilian retail.



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Salmon



With 12,964 samples, salmon maintains strong market penetration and structural stability, sustaining its premium positioning and consistent presence in retail assortments.

Price dispersion remains high, particularly for fresh fillets and frozen fillets—especially in 125 g portions confirming that the category operates under multiple pricing strategies.

From a regional perspective, the Northeast recorded a significant decline in fresh fillets (-13.91%) and whole frozen products (-8.97%), while the North showed a rebound in whole frozen salmon (+7.69%), highlighting distinct local dynamics.

Table 1. Price Indicators – Whole and Filleted Salmon.

Presentation	Preservation	Current Week Price	Minimum and Maximum Prices	% Change vs. Previous Week
Whole	Frozen 2kg	R\$58.99	R\$49.90 - R\$79.89	0
	Fresh 4kg	R\$64.99	R\$49.99 - R\$99.99	-1.52
Fillet	Frozen 125g	R\$111.20	R\$111.20 - R\$241.52	0
	Frozen 500g	R\$111.80	R\$105.80 - R\$151.80	0
	Fresh 900g	R\$96.49	R\$69.49 - R\$144.90	0.62

This week's highlight for **frozen fillet** is:

Lowest price/kg:
R\$ 69.90 or R\$87.38/kg

Frozen Salmon Fish Fillet - Costa Sul (800 g)

Highest price/kg:
R\$ 30.19 or R\$241.52/kg

Frozen Salmon Fillet Pieces - Komdelli (125 g)

This week's highlight for **fresh fillet** is:

Lowest price/kg
R\$ 26.91 or R\$67.27/kg

Salmon Fillet with Skin, Chilled, Carrefour (400 g)

Highest price/kg:
R\$ 189.90/kg

Fresh Skinless Salmon Fillet - per kg (1 unit / 1 kg)



Cod



Dispersion remains high, especially in loins, highlighting the coexistence of very distinct strategies across brands and positioning tiers. In split cuts, the price range is also relevant, with greater sensitivity observed in alternative species, which are traditionally more price-elastic. This behavior reinforces that current adjustments are concentrated in the intermediate tier of the category, while the premium segment remains supported.

Regionally, there is a slight decline in loins in the Northeast (-3.47%) and stability in the other regions. In split cuts, the Northeast shows an increase (+7.75%), suggesting a localized rebound. The scenario indicates a controlled seasonal transition, with retail adjusting mix and competitiveness ahead of the demand intensification typical of the religious calendar, with no signs of structural price disorganization so far.

Table 2. Price Indicators – Cod Loin and Split Cod.

Presentation	Preservation	Current Week Price	Minimum and Maximum Prices	% Change vs. Previous Week
Loin	Cod (Generic)	R\$166.66	R\$104.95 - R\$347.39	4.21 ↑ \$
	<i>Gadus morhua</i>	R\$199.88	R\$123.70 - R\$269.90	0
	Pacific Cod - <i>Gadus macrocephalus</i>	R\$259.90	R\$169.90 - R\$279.90	0
Split	Saithe - <i>Pollachius virens</i>	R\$68.99	R\$54.99 - R\$68.99	2.99 ↑ \$
	Zarbo - <i>Brosme brosme</i>	R\$79.90	R\$69.90 - R\$79.90	14.31 ↑ \$
	Pacific Cod - <i>Gadus macrocephalus</i>	R\$84.89	R\$84.89	0
Ling - <i>Molva molva</i>		R\$99.90	R\$99.90	0
Cod (Generic)		R\$129.90	R\$61.07 - R\$169.99	0
<i>Gadus morhua</i>		R\$129.90	R\$61.07 - R\$169.99	0

Lowest price/kg:
R\$ 209.90 or R\$ 104.95/kg

Highest price/kg:
R\$ 799.00 or R\$ 347,39/kg

Cod Loin, Frozen,
(2 kg) – Bom Porto

Frozen Desalted
Gourmet Cod Loin –
Caxamar (2.3 kg)
“Mambo”

Salted Saithe
Cod (800 g)

Atlantic Cod
(*Gadus morhua*)
– 11x15 Portions
(1.4 kg)

Lowest price/kg:
R\$ 43.99 or R\$ 54.99/kg

Highest price/kg:
R\$ 279.86 or R\$ 199.90/kg

LOIN

SPLIT

Tilapia



With 27,951 samples during the week, tilapia maintains strong market penetration, despite a slight reduction in the number of active retail points. Overall, frozen fillets declined by -2.06%, while frozen breaded fillets remained stable. The national reading suggests stability, but the category continues to operate with strong internal heterogeneity.

The price range confirms this scenario: for frozen fillets, values vary by up to 300%, reflecting relevant differences in brand, value proposition, and regional positioning. The Midwest maintains the highest median level (R\$ 72.22/kg; +3.19%), while the South operates at the lowest level (R\$ 49.75/kg; -0.16%). The North showed a stronger increase (+9.05%), although with a smaller sample base, and the Southeast expanded its presence (+4.72% in samples) with a slight price rebound (+1.42%).

For frozen breaded fillets, stable medians contrast with a significant increase in samples in the Southeast (+11.07%), suggesting intensified competition without an immediate price shift. Tilapia remains structurally stable, but with regional pockets of greater dynamism.

Table 3. Price Indicators – Tilapia Fillet.

Presentation	Current Week Price	Minimum and Maximum Prices	% Change vs. Previous Week
Frozen Fillet	R\$53.62	R\$35.74 - R\$131.07	-2.06
Breaded Frozen Fillet	R\$82.48	R\$57.25 - R\$112.45	0



PREPARED BY:

JUBART DATA



The Brazilian seafood market does not evolve in a linear or homogeneous way. It reorganizes itself by species, cut, region, retail chain, and consumption calendar. Aggregated movements indicate trends; fragmented movements reveal strategy. Competitive advantage is built precisely within this difference.

In this edition, we present the public layer of the analysis. The full version provides deeper insights by brand, retail chain, statistical dispersion, assortment density, and regional dynamics, offering objective support for pricing decisions, commercial negotiations, and strategic repositioning. This level of detail makes it possible to understand not only “how much” the market moves, but also “where” and “how” it moves.

Companies that monitor only the median react. Companies that monitor dispersion, fragmentation, and adjustment speed anticipate movements and protect margins. For access to the detailed analyses and recurring monitoring plans, our team is available to present the delivery formats and the available levels of depth.

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