

# Weekly Report

#Week 06

## National Fish Observatory





# WELCOME

**JUBART DATA** is a market intelligence and applied data consultancy, specialized in pricing, competitive analysis, and digital retail monitoring.

In this edition of the National Fish Observatory, we present the weekly price analysis of Salmon, Cod, and Tilapia, covering the period from **February 2 to February 8, 2026**.

The analysis is based on daily data collection across **11 product categories** in **105 cities, 20 states**, spanning **the five regions of Brazil**, with a direct comparison to the previous week (**January 26 to February 1, 2026**).

In total, **652,608 data points** were collected from **470 retail stores**. This report aims to identify price formation patterns, competitive behavior, and relevant market signals, providing a solid foundation for commercial, strategic, and positioning decisions within the fish and seafood sector.



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# Salmon



In total, 25,866 salmon price observations were collected.

Week 06 reinforces the stable positioning of salmon in the Brazilian retail market, with prices anchored across most formats and isolated adjustments concentrated in specific items and regions.

Fresh whole salmon recorded a significant price decline (-5.7%), driven mainly by the Southeast region (-9.2%), indicating a competitive adjustment in a market more exposed to volume, replenishment dynamics, and logistical sensitivity. In the other regions, prices remained stable, preserving clear regional differentials. Fresh salmon fillet remained fully stable across all weights and regions, despite a wide price dispersion. Frozen whole salmon also showed no weekly variation, with relatively homogeneous prices across regions. For frozen salmon fillet, stability prevailed across most cuts, with the exception of a relevant price drop in the Northeast (-35.5%), associated with assortment adjustments and possibly SKU substitution or specific promotional actions, rather than a structural downward price trend.

**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\$65.99	R\$49.99 - R\$99.99	-5.72
Fillet	Frozen 125g	R\$119.20	R\$111.20 - R\$241.52	0
	Frozen 500g	R\$111.80	R\$105.80 - R\$153.96	0
	Fresh 900g	R\$109.99	R\$84.90 - R\$144.90	0

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

**Lowest price/kg:**  
R\$ 69.90 ou R\$87.38/kg

Frozen Salmon Fish  
Fillet – Costa Sul  
(800 g)  
"Atacadão"

**Highest price/kg:**  
R\$ 30.19 ou R\$241.52/kg

Frozen Salmon  
Fillet Pieces –  
Komdelli (125 g)  
"Carrefour"

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

**Lowest price/kg**  
**R\$ 76.41 ou R\$84.90/kg**

Chilled Skin-On  
Salmon Fillet –  
Carrefour (Approx.  
900 g)  
"Carrefour"

**Highest price/kg:**  
R\$ 189.90/kg

Fresh Skinless  
Salmon Fillet – per  
kg (1 unit / 1kg)  
"Oba"



# Cod

A total of 29,930 cod price observations were recorded over the last two weeks. Week 06 confirms the structurally fragmented nature of the cod market, characterized by strong price dispersion across species, cuts, and regions, and the absence of generalized price adjustment movements.

Category behavior remains more closely associated with assortment composition, species substitution, and commercial positioning than with short-term price pressures. For loin cuts, prices remain high and relatively stable, with emphasis on *Gadus macrocephalus* (Pacific cod), which recorded a slight increase (+4.0%), consolidating its position at the upper end of the price spectrum, with greater dispersion observed in the Southeast region.

For split cod (espalmando), stability predominates, with the notable exception of *Gadus macrocephalus*, which showed a significant decline (-24.5%), signaling a specific assortment adjustment or commercial repositioning, rather than a structural shift in the category. The South and Northeast regions concentrated the lowest price levels, reinforcing their role as entry-level markets for the category.

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

Presentation	Preservation	Current Week Price	Minimum and Maximum Prices	% Change vs. Previous Week
Loin	Saithe - <i>Pollachius virens</i>	R\$99.88	R\$99.88	0
	Cod (Generic)	R\$159.90	R\$104.95 - R\$434.35	0
	<i>Gadus morhua</i>	R\$199.88	R\$153.70 - R\$269.90	0
	Pacific Cod - <i>Gadus macrocephalus</i>	R\$259.90	R\$169.90 - R\$279.90	4.00
Split	Saithe - <i>Pollachius virens</i>	R\$66.99	R\$52.99 - R\$66.99	0
	Zarbo - <i>Brosme brosme</i>	R\$69.90	R\$69.90	0
	Pacific Cod - <i>Gadus macrocephalus</i>	R\$84.89	R\$84.89 - R\$139.90	-24.47
	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\$199.90	R\$139.90 - R\$199.90	0





# Tilapia

A total of 48,258 tilapia price observations were collected. Week 06 confirms a stable tilapia market, with isolated adjustments. Frozen tilapia fillet showed a slight price recovery (+2.6%).

The South region operates at the lowest national price level, reinforcing its competitive position, while the Central-West and Southeast regions show signs of adjustment following previously higher price levels. Breaded frozen tilapia fillet remains price-anchored across all markets, with clear regional price-tier segmentation, but no weekly variation.

**Table 3.** Price Indicators – Tilapia Fillet.

Presentation	Current Week Price	Minimum and Maximum Prices	% Change vs. Previous Week
Frozen Fillet	R\$53.62	R\$37.37 - R\$119.56	2.62
Breaded Frozen Fillet	R\$82.48	R\$42.42 - R\$112.45	0

**Lowest price/kg:**  
R\$ 29.90 ou R\$37.37/kg

Frozen Tilapia Fish  
Fillet – Costa Sul (800  
g)  
“Atacadão”

**Highest price/kg:**  
R\$ 29.89 ou R\$ 119.56/kg

Frozen Tilapia Fillet –  
Carrefour Special  
Sabor & Qualidade  
(250 g)  
“Carrefour”

## FROZEN FILLET

**Lowest price/kg:**  
R\$ 16.97 ou R\$ 42.42/kg

Breaded Frozen Tilapia  
Fillet (Multigrain) –  
Copacol (400 g)  
“Atacadão”

Breaded Tilapia  
Fillet – Seara  
Pescados (400 g)  
“Mambo”

**Highest price/kg:**  
R\$ 44.98 ou R\$ 112.45/kg

## BREADED FROZEN FILLET

PREPARED BY:

# JUBART DATA



The week under analysis takes place within a context of high complexity in the Brazilian food retail market, characterized by regional differences, multiple store formats, and greater consumer sensitivity to price and assortment. In this environment, aggregated analyses no longer accurately capture real market dynamics.

In this edition, JubartData's consolidated database brings together a large volume of point-of-sale records, enabling a granular and recurrent assessment of price formation, product presentations, and competitive strategies. The variations observed across species, formats, and regions reveal tactical price adjustments and assortment shifts that only become visible through systematic monitoring.

The full report deepens this analysis by brand, retail chain, region, and presentation type, providing robust insights to assess pricing, market coverage, assortment strategy, and true product competitiveness over time. For access to detailed analyses and commercial information, please contact our team.



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