
BRAZIL ROUTES TO MARKET

May 2018 Report

The logo for Wine Intelligence, featuring the word "wine" in a lowercase, sans-serif font with a white dot above the "i", and the word "intelligence" in a smaller, lowercase, sans-serif font below it. The logo is set against a light blue circular background.

wine
intelligence



The Brazil Routes to Market 2018 report

Report overview



Report price:

GBP 2,500
USD 3,500
AUD 4,500
EUR 3,000

5
report
credits

The Brazil Routes to Market 2018 report includes:

- Report with the latest information on the Brazilian wine market, supported by:
 - Wine Intelligence Vinitrac®
 - Wine Intelligence market experience
 - Secondary sources
 - Trade interviews
- This 69-page report offers a detailed analysis of how the market is performing and includes mid- to long-term factors impacting the wine business as well as input from nine of the leading thinkers within the Brazilian wine market.

CONTENTS



- Introduction p. 4
- Mid to long-term factors impacting the wine business p. 6
- Brazilian market context p. 12
- Brazil at a glance p. 16
- Domestic wine p. 21
- Imported wine p. 26
- Importer profiles p. 34
- Regional profiles p. 58
- Labelling considerations p. 66

Brazil has spent a lot of the 21st Century as front page news across the world. Once revered as a shining example of the BRIC economic growth miracle, then winning the right to stage the world's two biggest showcase events – the World Cup and the Olympics – more recently the story has changed to one of political scandal, corruption trials, grinding urban poverty and criminal violence.

Despite the negative news of the past few years, Brazilians' resilience and optimism is hard to equal. With a smile in the face and a bit of samba, life moves on, as it only can do in this extraordinary country.

The recent political and economic crisis was expected to impact the wine business negatively. It certainly changed things but, despite all the noise, the most recent available data on the sector suggests another story. Total wine consumption didn't increase, but it didn't decrease either. Brazilian consumers kept on raising glasses and the industry, pressured, evolved into more professionalization, consolidation and, maybe most importantly, innovation. The online channel has managed to establish itself as a dis-intermediator of inefficient supply chains, and take advantage of beneficial (but hideously complex) tax systems. This channel alone accounted directly for about 15% of all wine imports to Brazil in 2017, against 10% in 2016. This report explores and documents the main players in this important and growing channel.

This report also aims to unpick some of the mysteries about the Brazilian wine market supply chain, and reveal the opportunities and tools for those wanting to compete effectively with their wines in the largest economy of Latin America. What does domestic production look like? What is going on in distribution? What are the main regional differences and who are the main local importers? What makes each one of these importers unique? Which points of entry do wine business use, and how do different taxes work? Which are the main labelling requirements?

These are all topics we tried to explore in this exciting, but complex, market that is still wrapped in lots of uncertainty towards the future, but has potential to develop and grow further.

Management summary

Key findings



- 1.** There are better modernisation levels and geographical reach of distribution networks, meaning wine distribution is profoundly changing and becoming more efficient
- 2.** Online shopping channels will continue to grow, including the e-commerce channel, which will be driven by the development in a faster online shopping experience
- 3.** Despite some barriers, the wine market seems to be at a tipping point, due to a combination of a growing demand amongst Millennials, increased professionalism in the sector and an anticipated growth in the wine tourism industry

How does Vinitrac[®] work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

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