



WINE INTELLIGENCE

# PORTUGAL WINE LANDSCAPES

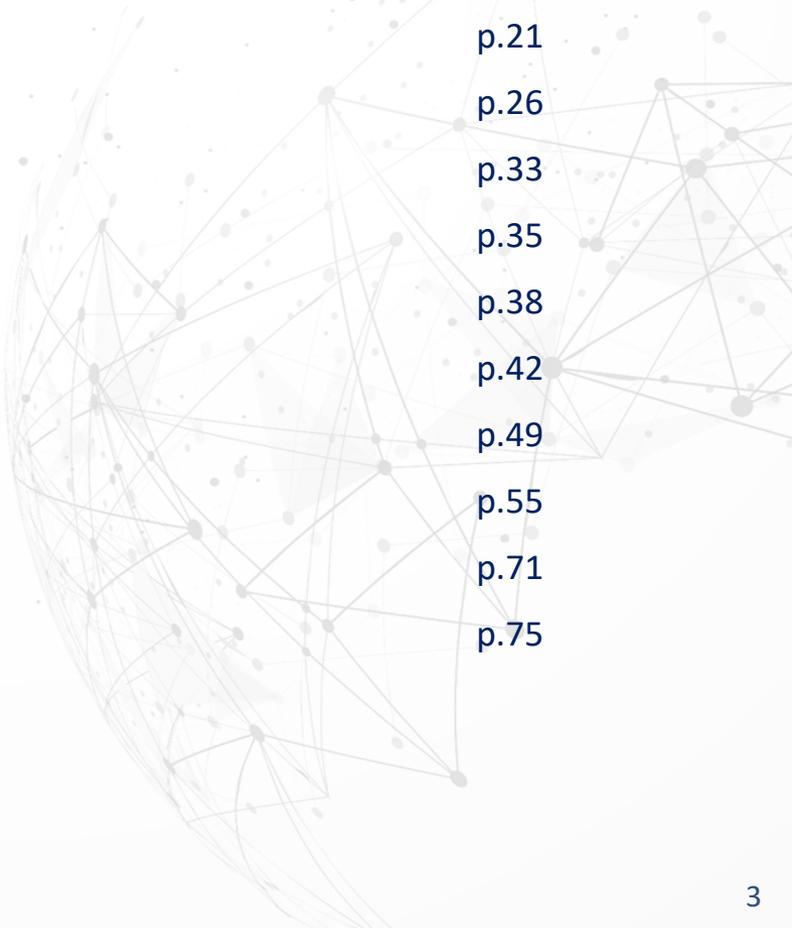
MARCH 2020



## Copyright

### © Wine Intelligence 2020

- All rights reserved. No part of this publication may be reproduced in any form (including photocopying or storing it in any medium by electronic means) without the permission of the copyright owners. Application for permission should be addressed to Wine Intelligence.
- The source of all information in this publication is Wine Intelligence unless otherwise stated.
- Wine Intelligence shall not be liable for any damages (including without limitation, damages for loss of business or loss of profits) arising in contract, tort or otherwise from this publication or any information contained in it, or from any action or decision taken as a result of reading this publication.
- Please refer to the Wine Intelligence Terms and Conditions for Syndicated Research Reports for details about the licensing of this report, and the use to which it can be put by licensees.
- Wine Intelligence Ltd: 109 Maltings Place, 169 Tower Bridge Road, London SE1 3LJ Tel: 020 73781277. E-mail: [info@wineintelligence.com](mailto:info@wineintelligence.com). Registered in England as a limited company number: 4375306

A large, faint network diagram in the background, consisting of numerous grey dots connected by thin grey lines, forming a complex web of connections. The dots are of varying sizes and are scattered across the right side of the page, with a denser cluster of connections on the right side.

■ Management Summary	p.5
■ Overview of Portuguese wine market	p.15
■ Overview of Portuguese wine consumers	p.21
■ Hot topic: Moderation	p.26
■ Beverage repertoire	p.33
■ Varietal consumption	p.35
■ Country and region of origin health	p.38
■ Wine purchase behaviour	p.42
■ Wine consumption behaviour	p.49
■ Brand health	p.55
■ Port brand health	p.71
■ Research methodology	p.75

# RESEARCH METHODOLOGY

Vinitrac®



- The data for this report was collected in Portugal in November 2017, November 2018 and October 2019
- Data was gathered via Wine Intelligence's Vinitrac® online survey
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of Portuguese regular wine drinkers in terms of gender and age
- The distribution of the sample is shown in the table:

		<b>Nov-17</b>	<b>Nov-18</b>	<b>Oct-19</b>
		<b>n= 1,000</b>	<b>1,001</b>	<b>1,405</b>
<b>Gender</b>	Male	55%	55%	56%
	Female	45%	45%	44%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Age</b>	18-24	2%	2%	2%
	25-34	11%	11%	13%
	35-44	18%	18%	19%
	45-54	19%	19%	20%
	55-64	21%	21%	19%
	65 and over	29%	29%	27%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Wine Intelligence, Vinitrac® Portugal, November 2017 (n = 1,000), November 2018 (n = 1,001) and October 2019 (n = 1,405), Portuguese regular wine drinkers

## Qualitative



### Trade interview methodology

- Trade Interviews were conducted with six experienced industry professionals in the Portuguese wine trade in 2020
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The six interviewees were members of the wine trade working in different roles:
  - *1 x Wine Producer*
  - *1 x Wine Region Association*
  - *2 x Wine Distributor*
  - *1 x Wine Wholesaler*
  - *1 x Wine Producer and Distributor*

# Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

## Definitions and Interpretation

The “Agreement” means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

“WI” is Wine Intelligence Ltd, trading as Wine Intelligence.

“Customer” means the person or entity purchasing the Licence for the use of the Syndicated Research Report(s)

“Proprietary Information” means all information contained in the Syndicated Research Report(s) and associated briefings or presentations by WI, plus all logos, Processes, third party data and formats contained therein

“Licence” means the Customer’s right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

“Acceptance of Proposal” means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

“Fees” means the fees payable by the Customer to WI, as set out in the Contract, plus VAT at the current rate, subject to exemptions as set out in UK and EU law

“Processes” means any research processes, techniques and methodologies used in the creation of the Syndicated Research Report(s)

“Proposal” means the specification of the Syndicated Research Report(s) by WI to the Customer

“Syndicated Research Report” means a written document containing Wine Intelligence copyright materials such as data, information, insight, commentary, either written, oral, video, or audio and, where appropriate, copyright materials of a Third Party that have been reproduced by permission

“Representative Organisation” means any body, association, trading group, generic organisation or any other coalition of interested parties, howsoever constituted, that acts on behalf of a broader group of stakeholders

“Subscription Products” means Syndicated Research Reports delivered to the Customer periodically as part of an ongoing Agreement

## 1. Engagement

The Customer engages WI to provide the Syndicated Research Report(s), and WI agrees to do so upon the terms of the Agreement for payment of the Fees.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, [XX] Dollars, Australian Dollars, Canadian Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

## 2.. Copyright

2.1 The Copyright in the Syndicated Research Report(s) shall at all times vest with WI. The copyright in all artwork, data and copy for each element of the report created and assembled by WI shall at all times remain the property of WI.

2.2 All copyright and any other intellectual property rights in any material produced supplied or made available by a third party to WI for inclusion in the Syndicated Research Report shall remain the property of the third party. The Customer warrants its title to WI, except as may be expressly disclosed in writing, and agrees to indemnify WI against any claims by third parties in respect of any infringement of their copyright or other intellectual property rights.

2.3 WI asserts to the Customer its moral right to be identified as the author of the Syndicated Research Report in accordance with the UK Copyright Designs and Patents Act 1988 Section 77 and 78, and shall be entitled to hold itself out as the author of the Syndicated Research Report (and in particular the research undertaken in the process of completing the Syndicated Research Report) as part of WI’s own general marketing activities. WI shall be entitled to publish the name of the Customer in association with the Syndicated Research Report(s) as part of this general marketing activities.

2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

## 3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organisation, including organisations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative Organisation, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative Organisation, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

## 4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions



*Connecting wine businesses with  
knowledge and insights globally*

## **Wine Intelligence London (Head Office)**

109 Maltings Place  
169 Tower Bridge Road  
London  
SE1 3LJ

Telephone: +44 (0) 208 194 0090  
Email: [info@wineintelligence.com](mailto:info@wineintelligence.com)  
Website: [www.wineintelligence.com](http://www.wineintelligence.com)

Follow us:   