WINE INTELLIGENCE

BRAZIL WINE LANDSCAPES 2021

DECEMBER 2020

REPORT BROCHURE

PRICING

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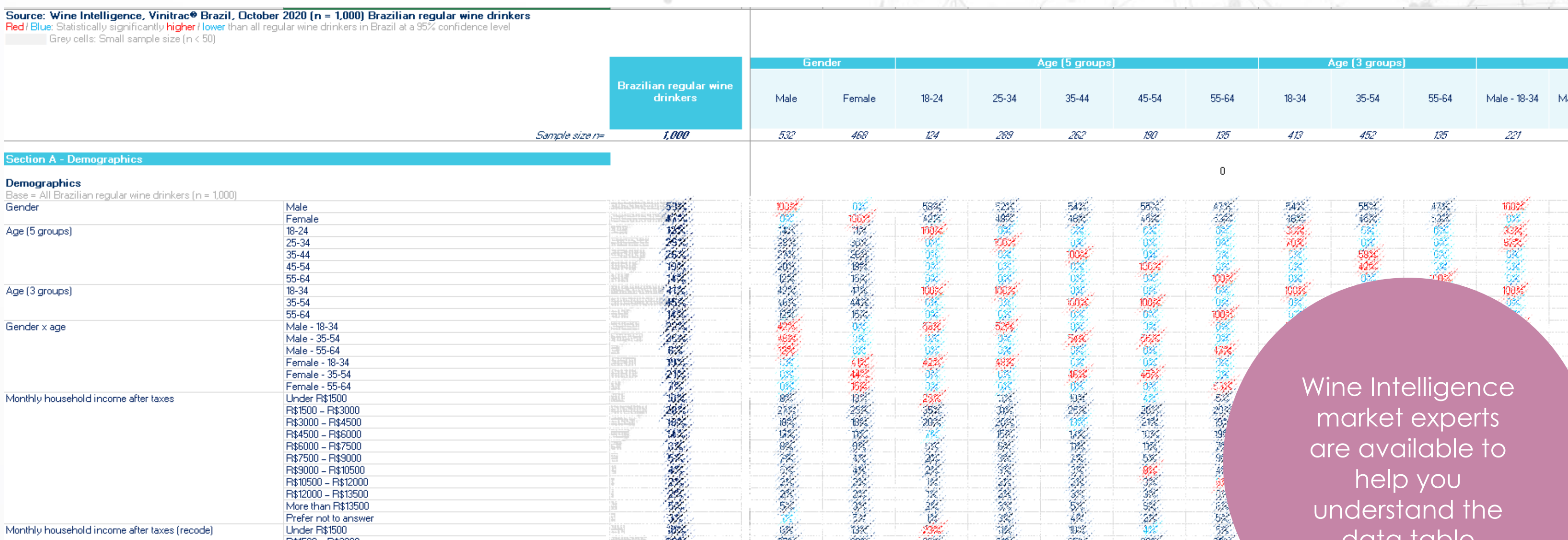
DATA TABLE DETAILS

Data table includes:

- **Profiling by cross-tabs** including gender, age, income, location, online wine buyers and wine involvement
- **Tracking** against past waves where available
  - This data table includes October 2017, October 2019 and October 2020
- **All significances highlighted**

Example screenshot of data table:

Data will not be blurred when you receive the report



Wine Intelligence market experts are available to help you understand the data table

INTRODUCTION

2020 has been a good year for wine in Brazil. This year has seen consumers drinking more wine due to social isolation measures and there are now more consumers drinking wine. From 2018 to 2020 alone, the market added 7 million new regular wine drinkers—those who say they drink wine at least once a month.

The growth in the number of new wine consumers in Brazil has been phenomenal. In 2010, there were 22.4 million regular consumers. A decade later, this number has almost doubled, topping 39 million consumers in 2020.

Analysis of volumes for 2020 shows that between January and June, 200 million litres of wine were sold — a record for the period and an increase of 28% over the previous year. Despite this growth, per capita consumption in Brazil remains low, leaving the country in 74th place worldwide. In addition to 39 million regular consumers, there are another 44 million Brazilians who drink wine, but less frequently than once a month. These groups, combined, make up only 40% of the total population of the country.

The standout performance for 2020 goes to domestic producers. The rise in the value of the US dollar (by around 40% in 2020), greater proximity of points of sale and a consumer that is less resistant to Brazilian wine contributed to the positive performance of the domestic sector. Among imported products, eyes remain focused on Portugal as investments by the sector have proven effective. With growth of 17% in the 1st semester of 2020, Portugal is expected to surpass 2 million cases imported by the end of this year. The level of awareness is second only to Brazilian wines, the market leader with 73% market share by volume.

Similar to other markets, Brazilians have begun to spend more on wine since social restrictions have kept them from spending on travel, leisure, bars and restaurants. Accustomed to drinking in social gatherings or at special dinners, Brazilian consumers discovered that a glass of wine makes for an excellent companion during an afternoon at home, for a typical lunch or even while reading a good book.

Despite the great strides being made in the market, challenges definitely still remain. How do we migrate consumers from table wines (produced on a large scale, at low prices) to fine wines (considered expensive and sophisticated by the public at large)? How do we make newcomers to the category drink wine more frequently? What do new regular wine drinkers want and how can we attract younger people? How long will we face the effects of the pandemic and how will this affect consumption habits?

With the arrival of 2021, we can all celebrate the start of vaccinations against Covid-19, but it will also be a year of uncertainty and heightened caution as we figure out what consumer behaviour will look like.

EXAMPLE SLIDE:

MANAGEMENT SUMMARY

DOMESTIC WINE VOLUMES HOLDING STRONG

Domestic wine volumes continue to hold the majority share in the Brazilian market

The shift towards imported wines has slowed over the past year, with domestic wine volumes accounting for three fourths of the market share

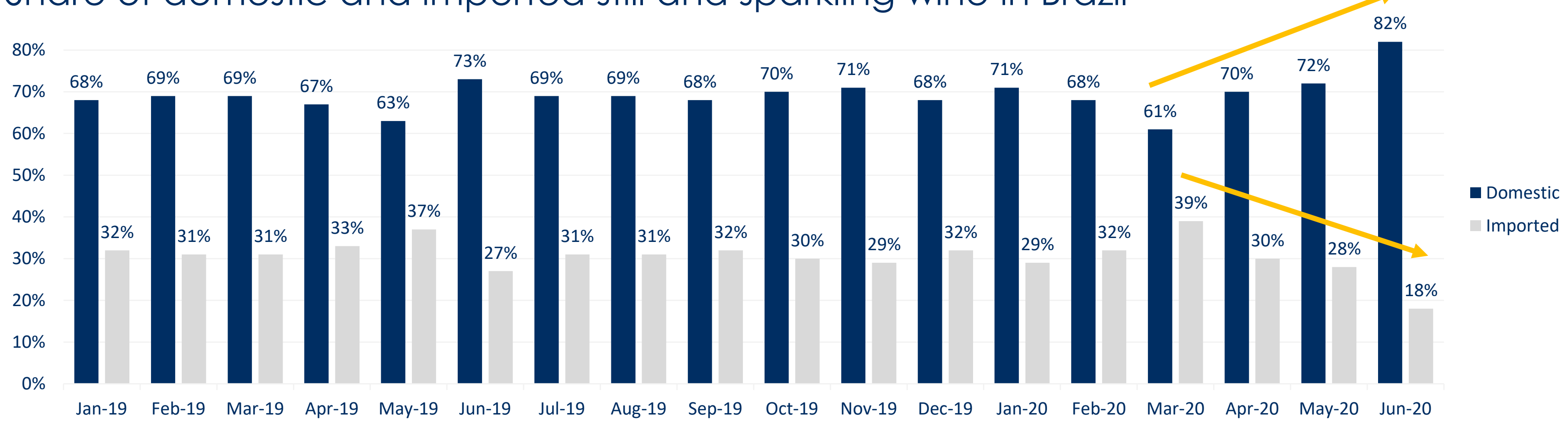
The global pandemic continues to influence current Brazilian consumer behaviour, with regular wine drinkers consuming more of both imported and domestic wine, though a sharp rise was seen for domestic wine due to exchange rates hindering wine importation according to trade members

WHAT DO MARKET EXPERTS SAY?

"A main reason for the domestic sales growth was the unfavourable exchange rate for importing which affected imports and favoured domestic entry level wines"

Wine Buyer, Brazil

Share of domestic and imported still and sparkling wine in Brazil



Wine Intelligence trade interview programme 2020
Source: Ideal Consulting, Uvibra, estimated figures

EXAMPLE SLIDE: ATTITUDES TOWARDS WINE

wine intelligence

Whilst being adventurous with different wine styles has seen a decrease amongst regular wine drinkers over the past year, this is likely to be caused by older drinkers as the younger cohort are proportionately more eclectic with their wine choices

Attitude towards wine: Tracking

Base = All Brazilian regular wine drinkers (n=1,000)

	2017	2019	2020	Tracking	
n=	*1,000*	*1,000*	*1,000*	vs. '17	vs. '19
I enjoy trying new and different styles of wine on a regular basis	70%	80%	70%	→	↓
I don't mind what I buy so long as the price is right	7%	7%	8%	→	→
I know what I like and I tend to stick to what I know	22%	13%	22%	→	↑

Attitudes towards wine: By age

Base = All Brazilian regular wine drinkers (n=1,000)

		Age groups		
	All Brazilian regular wine drinkers	18-34	35-54	55-64
n=	*1,000*	*413*	*452*	*135*
I enjoy trying new and different styles of wine on a regular basis	70%	75%	67%	64%
I don't mind what I buy so long as the price is right	8%	9%	8%	8%
I know what I like and I tend to stick to what I know	22%	16%	25%	28%

Red / Blue: Statistically significantly higher / lower than all Brazilian regular wine drinkers at a 95% confidence level
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Brazil, Oct'17, Oct'19 and Oct'20 (n=1,000) Brazilian regular wine drinkers

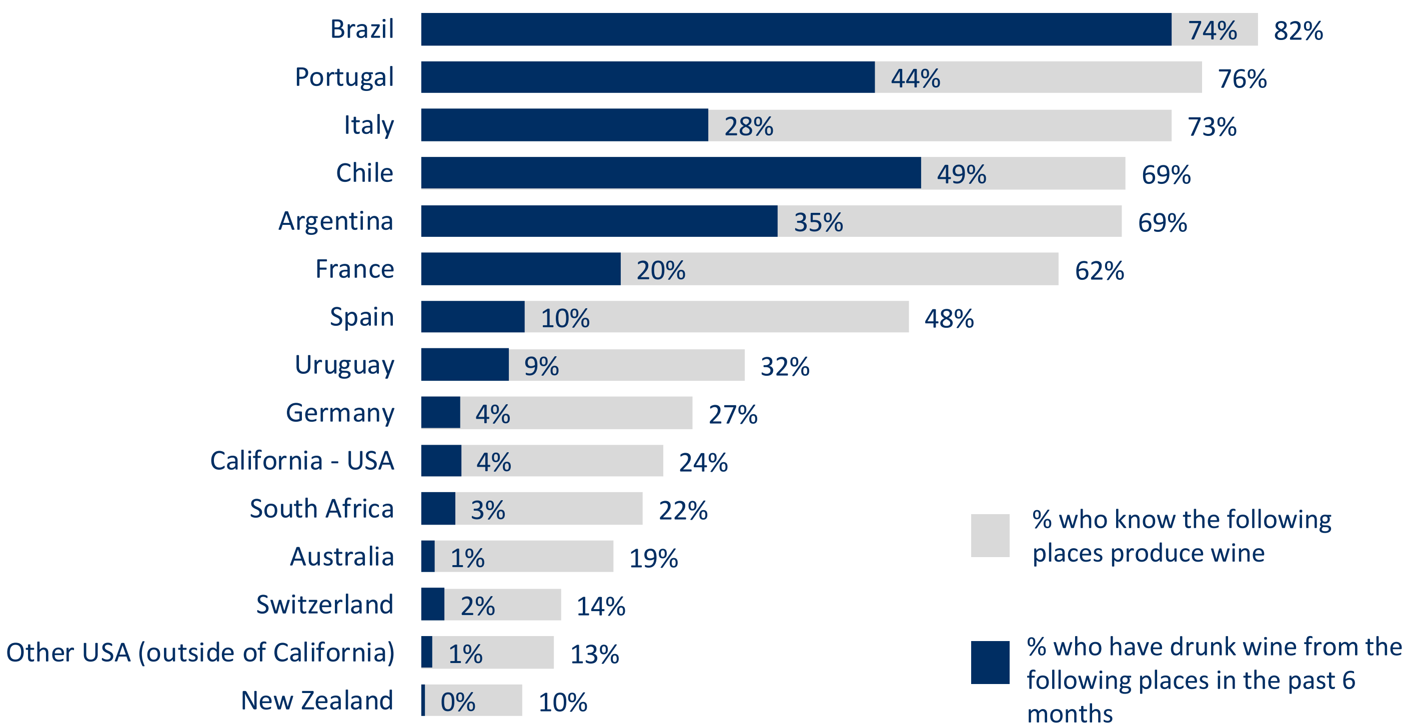
vinitrac.

EXAMPLE SLIDE: COUNTRY OF ORIGIN AWARENESS AND CONSUMPTION

Awareness aligns with market volumes in that Brazil is the dominant force. Outside of this, Old World markets, Portugal and Italy have the highest awareness levels

Country of origin **awareness** and respective **consumption** level

Base = All Brazilian regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® Brazil, October 2020 (n=1,000) Brazilian regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE

The data for this report was collected in Brazil in October 2017, October 2019 and October 2020

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 Brazilian regular wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table

			Oct-17	Oct-19	Oct-20
		n=	*1,000*	*1,000*	*1,000*
Gender	Male		53%	53%	53%
	Female		47%	47%	47%
	Total		*100%*	*100%*	*100%*
Age	18-24		16%	12%	12%
	25-34		30%	29%	29%
	35-44		24%	26%	26%
	45-54		18%	19%	19%
	55-64		11%	14%	14%
	Total		*100%*	*100%*	*100%*
State	North		5%	7%	7%
	Bahia		8%	6%	6%
	North East (outside Bahia)		20%	20%	20%
	Espírito Santo + Minas Gerais		10%	11%	11%
	Rio de Janeiro		10%	10%	10%
	São Paulo		26%	24%	24%
	South		16%	15%	15%
	Midwest		6%	8%	8%
	Total		*100%*	*100%*	*100%*

Source: Wine Intelligence, Vinitrac® Brazil, October 2017 (n = 1,000), October 2019 (n = 1,000) and October 2020 (n = 1,000) Brazilian regular wine drinkers

Other sources in the report include Wine Intelligence market experience, secondary sources and trade interviews.

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