



A division of the IWSR Group

Portugal

Wine Landscapes 2022



PRICING

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pages

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WHAT'S NEW IN LANDSCAPE REPORTS?

For 2022 we will be expanding and upgrading our market leading Landscapes report series to include:

- More volume and value trend data about the wine category as part of total beverage alcohol
- Volume trend split by on-premise and off-premise
- E-commerce sales volumes
- Forecasts to 2025
- More hot topics including packaging, consumer segmentation and premiums
- Plus all the usual Wine Intelligence consumer usage and attitude tracking, including brand health
- Opportunity and Threat analysis
- Wine Intelligence expert view

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Hot Topic: Exclusive
Brands

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Research
Methodology



EXAMPLE SLIDE: Market overview (From Wine Intelligence compass wine market attractiveness model 2021)

Portugal: 14th largest wine market, ranked 32nd for market attractiveness

Wine Market Summary

Total wine consumption

37,961

'000 9 L cases of still wine

Long-term trend

- 3.1%

CAGR 2015-20

Imported wine consumption

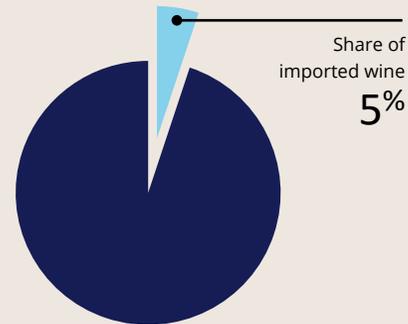
1,930

'000 9 L cases of still light wine

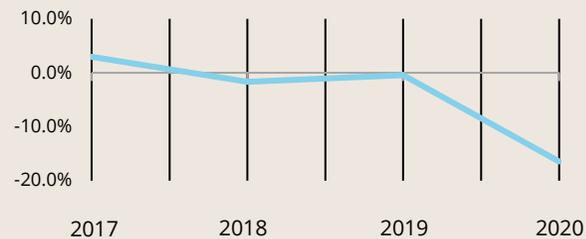
Consumption per capita

33.2

litres per year (still wine)



Wine volume growth rate:



Source: IWSR

Economic Summary

Adult population

8,900,000

GDP / Capita

22,792

US Dollars

GDP Long-term trend

0.66%

av. growth 2015-20

Predicted 2021 GDP:

3.90%

Unemployment rate

6.8%

GNI / Capita

22,000

US Dollars

Corruption Index:

61

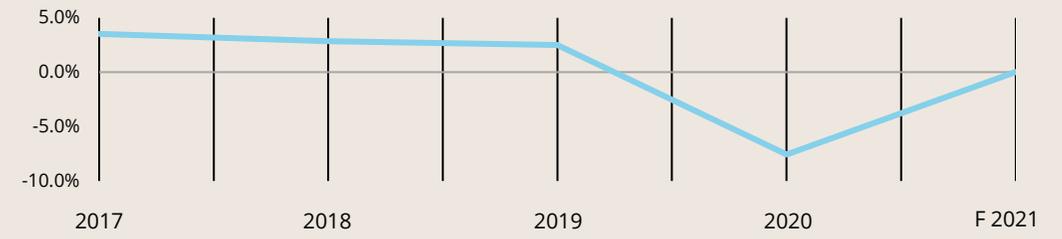
(0 to 100 ; 100 = no corruption)

Globalisation Index:

85

(1 to 100 ; 100 = very globalised)

GDP growth rate:



Source: IWSR

Research methodology: Quantitative

- The data was collected in Portugal in Nov '18, Oct '20 and Oct '21
- Data was gathered via Wine Intelligence's Vinitrac® online survey
- Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought 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, age and region
- The distribution of the sample is shown in the table:

		2018	2020	2021
		n=	(n=1,001)	(n=1,000)
Gender	Male	55%	56%	51%
	Female	45%	44%	49%
	Total	100%	100%	100%
Age	18-24	2%	2%	3%
	25-34	11%	13%	11%
	35-44	18%	19%	16%
	45-54	19%	20%	18%
	55-64	21%	19%	19%
	65 and over	29%	27%	33%
	Total	100%	100%	100%
Region	North	33%	37%	37%
	Center	47%	46%	45%
	South	17%	15%	16%
	Islands	4%	2%	3%
	Total	100%	100%	100%

Source: Wine Intelligence, Vinitrac®, Nov '18, Oct '20, Oct '21, (n≥1,000), Portuguese regular wine drinkers

Research methodology: Qualitative

- Market Interviews were conducted with four experienced industry professionals in the Portuguese wine trade in 2022
- 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 wine industry professionals working within the market in different roles:
 - 1 x Director at a Wine Distributor
 - 1 x Regional Commission
 - 1 x Director at a Wine Producer
 - 1 x Director of a Producer and Distributor



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