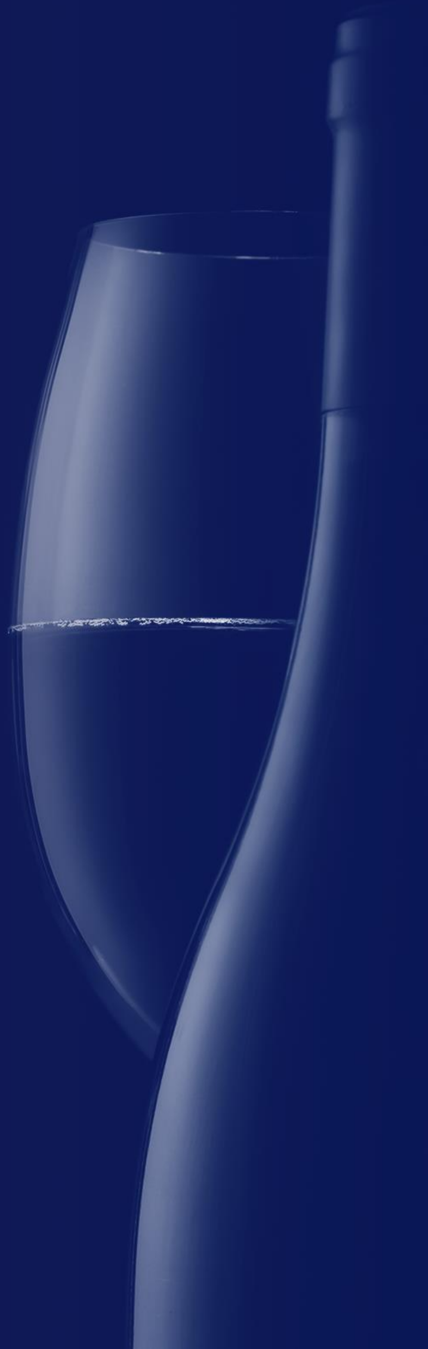
IWSR
drinks market analysis

# Brazil

## Wine Landscapes 2024



# Contents

# IWSR Viewpoint

## Brazil's wine-drinking population has seen remarkable growth since 2019, yet volumes of wine sold have tapered since 2020, especially impacting low-priced wines.

The wine-drinking population in Brazil has seen a remarkable surge in recent times, running contrary to a fall in the overall adult population. The monthly wine-drinking population has increased by 17.5%, an additional 6.3m drinkers, while the weekly wine-drinking population has grown by 7.4%, bringing in 2m more participants. Factors such as the influence of TV, social media and the availability of reasonably priced wines, have played pivotal roles.

The volume of wine sold in Brazil grew by 2.6% between 2017 and 2022, with still and sparkling wines registering growth of 4.8% and +4.9% respectively. However, after peaking in 2020, volumes declined by 4.9% from 2020–22. This was particularly pronounced in still wine, which contracted by 6.4% over the same period, with lower-priced wines hit most.

The decline in wine volumes sold from 2021 onwards can be attributed to Brazilian regular wine drinkers consuming wine less frequently and in smaller overall volumes than in the peak of the pandemic. The Brazilian market ranked only 84th for global per capita consumption. Factors contributing to declining volumes of wine sold include substitution of wine by other beverages, particularly by younger LDA+ consumers, budgets becoming tighter and fewer wine drinkers in the on-trade.

Market recalibration after the pandemic – including a return to normal life, increased travel and shifting expenditure priorities – help to explain the decline in volumes of still wine. Economic challenges, driven by high interest rates, inflation, global conflicts and the cautious climate around the 2022 election, have resulted in tighter consumer budgets and reduced disposable incomes. Heightened competition from beer and spirits has contributed to this trend.

There has been a notable shift in the demographic composition of regular Brazilian wine drinkers, with a decrease in the proportion aged LDA–34, and a significant increase in the 55–64 age group. This has notably influenced the attitudes of Brazilian wine enthusiasts, with less willingness to experiment with wine selections than in previous years.

Moreover, there has been a significant decline in the proportion of regular Brazilian wine drinkers consuming wine in bars and pubs, dropping to 54% from 61% in 2022. This can be attributed to the tighter budgets of regular wine drinkers and an increase in competition from other beverage categories.

### Opportunities

- Increased size of wine drinking population.
- Improved perception of wine.
- Growth in popularity of high-quality imported wines.

### Threats

- Decline in volumes of wine sold since 2020 peak.
- Lower frequency of consumption.
- Issues in attracting younger drinkers.
- Drinkers' disposable incomes falling.
- Increased competition from other categories.

# Management Summary

# Key takeaways

1. Wine drinking population up since 2019

2. Declining volumes following 2020 peak

3. Wine consumption frequency falls

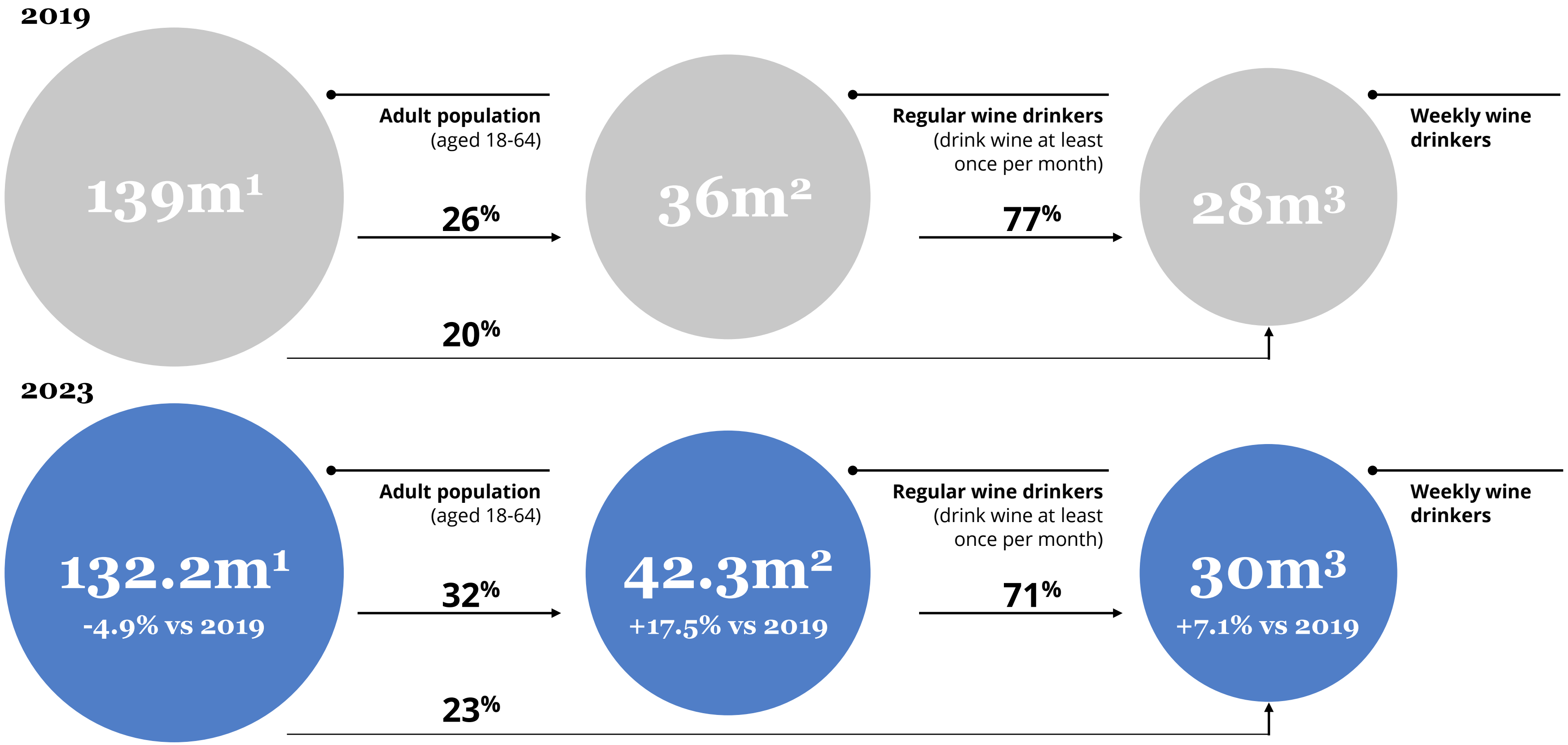
4. Fewer LDA–34s involved in wine

5. Regular wine drinkers are less experimental

6. Decline in consumption in pubs and bars

# 1. Wine drinking population up since 2019

## Despite a decrease in the total adult population since 2019, there has been an increase in wine category penetration with consumption reaching roughly a third of Brazilian adults




### Market context

"The sophisticated image of wine, the impact of TV and social media, and the availability of reasonably priced wines are driving increasing interest and awareness among Brazilians, leading to a rise in the number of new consumers each year."

*Executive Summary Report 2023, Brazil*

1 IBGE, 2019 estimated population. 2023 based on Census 2022 data
2 IWSR online calibration study, 2019 (n=876), rolling average of June 2022 and 2023, (n=2,019) Brazilian adults 18-64 years. Wine=still light wine (red, white, rosé)
3 IWSR, Vinitrac® Brazil, October 2019 and October 2023, (n≥706) Brazilian regular wine drinkers

# 2. Declining volumes following 2020 peak

## The volume of wine sold in Brazil increased by 2.6% between 2017 and 2022, although the category peaked in 2020 and has been in decline since, with a steep drop in the volumes of wine sold between 2021 and 2022

**Total beverage alcohol market volumes by category**

000s 9-litre cases

| | 2017 | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|---|
| Total beverage alcohol | 1,516,723.10 | 1,674,843.46 | 1,709,498.13 | 2.4% | 1.2% |
| Beer | 1,358,730.54 | 1,509,916.65 | 1,547,737.54 | 2.6% | 1.3% |
| Spirit* | 98,465.83 | 94,444.05 | 93,977.33 | -0.9% | -2.2% |
| Wine** | 44,142.47 | 53,613.70 | 50,585.54 | 2.6% | 4.7% |
| RTDs | 13,323.15 | 14,641.28 | 14,803.28 | 2.1% | 0.5% |
| Cider | 2,061.11 | 2,227.78 | 2,394.44 | 3.0% | 4.3% |

Market context

"After experiencing robust growth during the pandemic, still wine shows signs of slowing, with both low-priced and entry-level products experiencing a fall in sales."

"Considerable overstocks in retail may jeopardise healthy growth of the category in the short term."

*Executive Summary Report 2023, Brazil*

*Wine includes still wine, sparkling wine, fortified wine and light aperitifs
**Spirits includes whisky, gin and genever, vodka, agave-based spirits, national spirits, rum
Source: IWSR

# 3. Wine consumption frequency falls

## The proportion of Brazilians drinking wine daily or more than once a week has shrunk since 2019; this is likely to be driven by newer, less frequent consumers entering the category

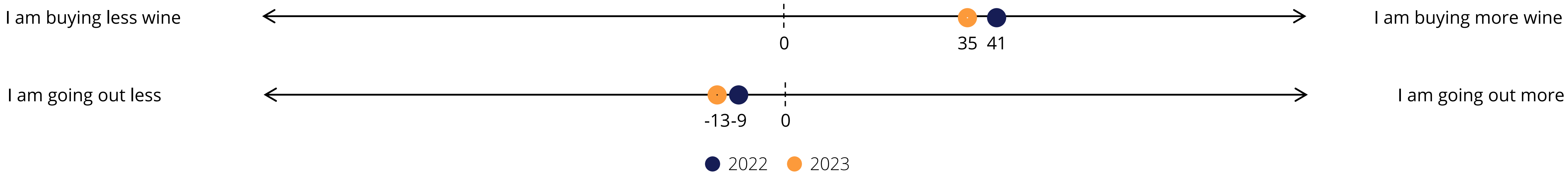
**Wine consumption frequency: Tracking**

Percentage who usually drink wine at the following frequency

| | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|
| Most days / every day | 10% | 7% | 6% | ↓ | → |
| 2-5 times a week | 36% | 37% | 31% | ↓ | ↓ |
| About once a week | 31% | 34% | 34% | → | → |
| 1-3 times a month | 23% | 22% | 29% | ↑ | ↑ |

**Consumer sentiment: spending and wine, tracked**

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement




Base: All Brazilian regular wine drinkers (n≥705)

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level

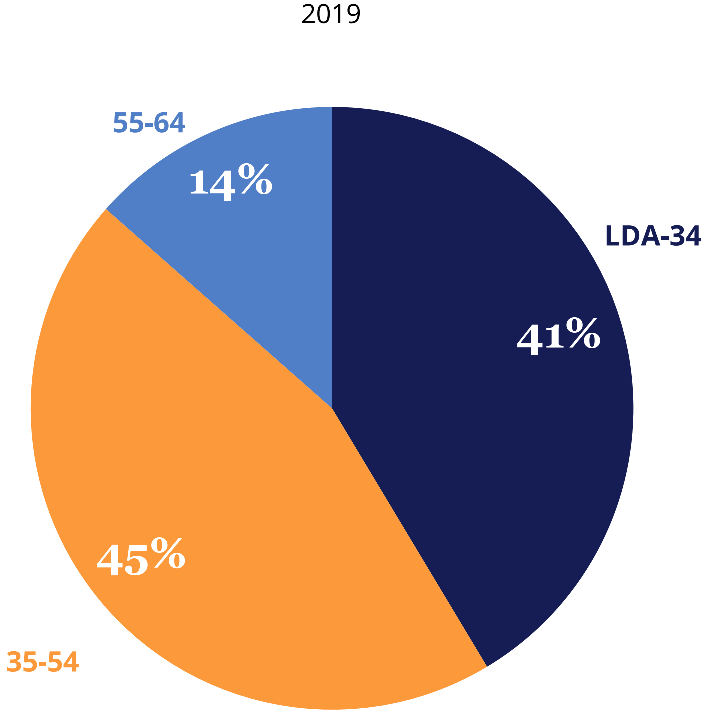
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023, (n≥705), Brazilian regular wine drinkers

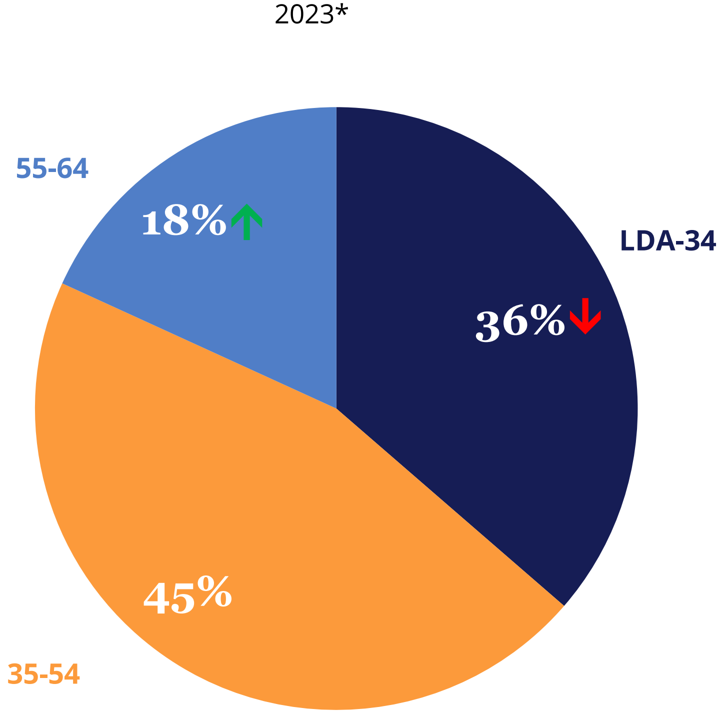
# 4. Fewer LDA–34s involved in wine

There has been a significant decrease in the proportion of younger Brazilian regular wine drinkers since 2019, while the proportion accounted for by those aged 55–64 has grown

**Brazilian Regular Wine Drinkers by Age Group: Tracking**

All regular wine drinkers in Brazil in 2023 compared with 2019




*Incidence for age do not equal 100% due to rounding
Base: All Brazilian regular wine drinkers (n≥705)
↑/↓: Statistically significantly higher/lower than the October 2019 at a 95% confidence level;
Source: IWSR, Vinitrac® Brazil, October 2019 and October 2023 (n≥705), Brazilian regular wine drinkers

# 5. Regular wine drinkers are less experimental

## A greater proportion of regular wine drinkers are sticking to what they know rather than trying new and different wine styles, driven by a greater proportion of older drinkers

### Attitudes towards wine: Tracking

Percentage who 'agree' or 'strongly agree' with the following statements

| | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|
| I enjoy trying new and different styles of wine on a regular basis | 80% | 70% | 70% | ↓ | → |
| I don't mind what I buy so long as the price is right | 7% | 9% | 9% | → | → |
| I know what I like and I tend to stick to what I know | 13% | 21% | 22% | ↑ | → |

### Attitudes towards wine by generation

Percentage who 'agree' or 'strongly agree' with the following statements

| | All Brazilian Regular Wine Drinkers (n=705) | Gen Z LDA-26 (n=106) | Millennials 27-42 (n=291) | Gen X 43-58 (n=249) | Boomers 59+ (n=59) |
|---|---|---|---|---|---|
| I enjoy trying new and different styles of wine on a regular basis | 70% | 75% | 76% | 64% | 57% |
| I don't mind what I buy so long as the price is right | 9% | 12% | 7% | 9% | 8% |
| I know what I like and I tend to stick to what I know | 22% | 13% | 17% | 27% | 35% |

Base: All Brazilian regular wine drinkers (n≥705)

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# 6. Decline in consumption in pubs and bars

## After a post-pandemic peak, buying wine in bars and pubs has decreased since 2022, from 61% of regular wine drinkers to 54%; there are fewer RWDs in younger age groups, who are most likely to drink in the on-trade

### Wine purchase in on-trade

Percentage who buy wine in a bar, pub or restaurant

| On-trade location | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| Bar or pub | Yes | 56% | 61% | 54% | → | ↓ |
| | No | 44% | 39% | 46% | → | ↑ |
| Restaurant | Yes | 81% | 82% | 80% | → | → |
| | No | 19% | 18% | 20% | → | → |
| On-trade drinkers | Yes | 88% | 88% | 85% | → | → |
| | No | 12% | 12% | 15% | → | → |

### Wine purchase in on-trade: by generation

Percentage who buy wine in a bar, pub or restaurant

| On-trade location | | All Brazilian Regular Wine Drinkers (n=705) | Gen Z LDA-26 (n=106) | Millennials 27-42 (n=291) | Gen X 43-58 (n=249) | Boomers 59+ (n=59) |
|---|---|---|---|---|---|---|
| Bar or pub | Yes | 54% | 65% | 60% | 46% | 36% |
| | No | 46% | 35% | 40% | 54% | 64% |
| Restaurant | Yes | 80% | 79% | 85% | 77% | 70% |
| | No | 20% | 21% | 15% | 23% | 30% |
| On-trade drinkers | Yes | 85% | 91% | 89% | 81% | 73% |
| | No | 15% | 9% | 11% | 19% | 27% |

### On-trade: Wine consumption frequency by occasion

Those who buy wine in the on-trade

| | 2019 | 2022 | 2023 | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|
| A relaxing drink out at the end of the day | 5.10 | 5.46 | 4.96 | → | → |
| With an informal meal in a pub / bar / restaurant | 3.77 | 3.53 | 3.47 | → | → |
| With a more formal dinner in a restaurant | 3.65 | 3.60 | 3.19 | ↓ | → |
| At a party / celebration / big night out | 2.92 | 2.96 | 3.03 | → | → |

Base: All Brazilian regular wine drinkers (n≥705)

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Management summary: tracking metrics

## White wine has experienced a significant decrease in consumption since 2019; wines produced in Brazil are being bought less by regular wine drinkers

### Top alcoholic beverages

Percentage who have drunk the following beverages in the past 12 months

| | 2019 | 2023 | Tracking |
|---|---|---|---|
| Red wine | 90% | 89% | → |
| Beer | 86% | 83% | → |
| White wine | 52% | 46% | ↓ |
| Vodka | 51% | 45% | ↓ |
| Whisky / Whiskey | 43% | 41% | → |

### Top country of origin

Percentage who have drunk wine from the following places in the past six months

| | 2019 | 2023 | Tracking |
|---|---|---|---|
| Brazil | 72% | 68% | ↓ |
| Chile | 47% | 47% | → |
| Portugal | 45% | 42% | → |
| Argentina | 33% | 35% | → |
| Italy | 31% | 30% | → |

### Top region of origin

Percentage who have drunk wine from the following regions in the past six months

| | 2019 | 2023 | Tracking |
|---|---|---|---|
| Serra Gaúcha | 47% | 47% | → |
| Vale dos Vinhedos | 19% | 23% | → |
| Tuscany | 19% | 16% | → |
| Mendoza | 16% | 15% | → |
| Rio Sao Francisco | 13% | 14% | → |

### Top wine brands

Percentage who have bought the following brands in the past three months

| | 2019 | 2023 | Tracking |
|---|---|---|---|
| Pergola | 31% | 33% | → |
| Casillero del Diablo | 24% | 24% | → |
| Quinta do Morgado | n/a | 24% | n/a |
| Chandon | n/a | 22% | n/a |
| Aurora | 18% | 18% | → |

Base: All Brazilian regular wine drinkers (n≥705)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019 and October 2023 (n≥705), Brazilian regular wine drinkers

# Management summary: tracking metrics

Purchase of wine in supermarkets has dropped from 82% of regular wine drinkers in 2019 to 69% in 2023. Atacadão has become the top retailer, reaching 34% of wine drinkers, while Extra's share dwindled to 17%

### Top red varietals

Percentage who have drunk the following varietals in the past six months

| | 2019 | 2023 | Tracking |
|---|---|---|---|
| Malbec | 46% | 48% | → |
| Merlot | 44% | 45% | → |
| Cabernet Sauvignon | 42% | 45% | → |
| Pinot Noir | 26% | 26% | → |
| Carménère | 23% | 23% | → |

### Top wine-buying channels

Percentage who have bought wine from the following channels in the past six months

| | 2019 | 2023 | Tracking |
|---|---|---|---|
| Supermarkets (Hypermarkets) | 82% | 69% | ↓ |
| Shop specialised in wine or alcohol | 34% | 31% | → |
| From atacarejo | 28% | 28% | → |
| From a supermarket (hypermarket) website | n/a | 27% | n/a |
| Convenience stores | 29% | 26% | → |

### Top white varietals

Percentage who have drunk the following varietals in the past six months

| | 2019 | 2023 | Tracking |
|---|---|---|---|
| Sauvignon Blanc | 36% | 37% | → |
| Moscato | 34% | 37% | → |
| Chardonnay | 39% | 37% | → |
| Pinot Grigio / Pinot Gris | 16% | 18% | → |
| Chenin Blanc | 18% | 16% | → |

### Top wine-buying retailers

Percentage who mainly use the following retailers to buy wine

| | 2019 | 2023 | Tracking |
|---|---|---|---|
| Atacadão | 25% | 34% | ↑ |
| Carrefour | 34% | 33% | → |
| Pão de Açúcar | 22% | 20% | → |
| Extra | 29% | 17% | ↓ |
| wine.com.br | 13% | 11% | → |

Base: All Brazilian regular wine drinkers (n≥705)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019 and October 2023 (n≥705), Brazilian regular wine drinkers

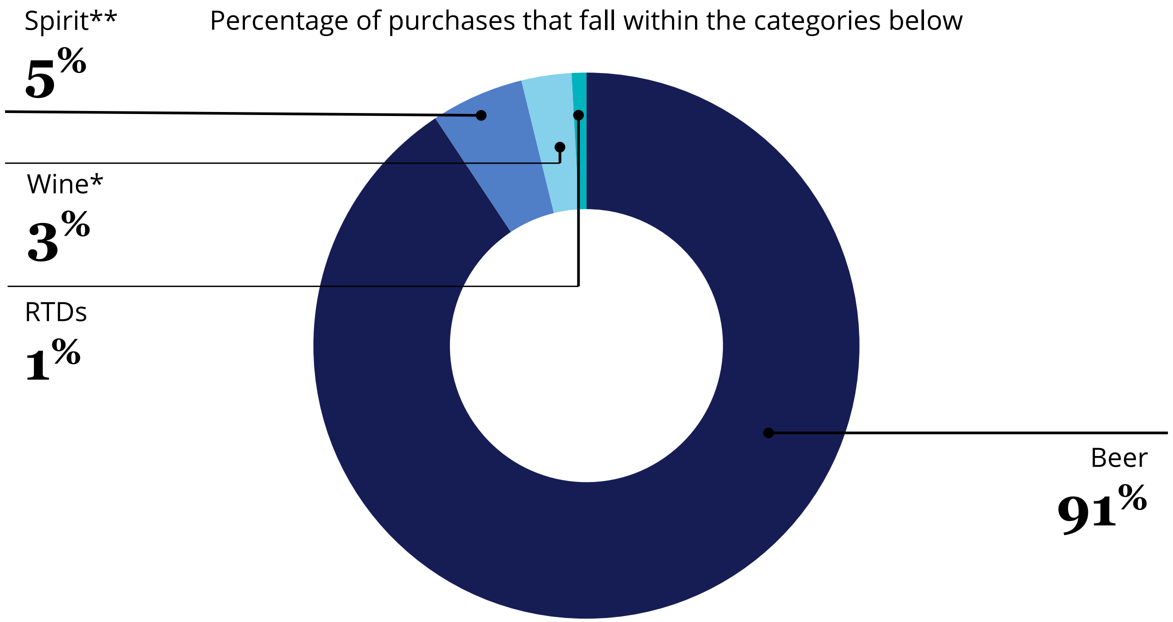
# Market Data

# Alcohol market share by category

Brazil's alcoholic beverage market is dominated by beer, which has 91% of volumes. Despite a decline from a post-pandemic peak, wine volumes increased by 2.6% CAGR between 2017 and 2022

**Total beverage alcohol market share by category**

Percentage of purchases that fall within the categories below




**Total beverage alcohol market volumes by category**

000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Total beverage alcohol | 1,674,843.46 | 1,709,498.13 | 2.4% | 1.2% |
| Beer | 1,509,916.65 | 1,547,737.54 | 2.6% | 1.3% |
| Spirit* | 94,444.05 | 93,977.33 | -0.9% | -2.2% |
| Wine** | 53,613.70 | 50,585.54 | 2.6% | 4.7% |
| RTDs | 14,641.28 | 14,803.28 | 2.1% | 0.5% |
| Cider | 2,227.78 | 2,394.44 | 3.0% | 4.3% |

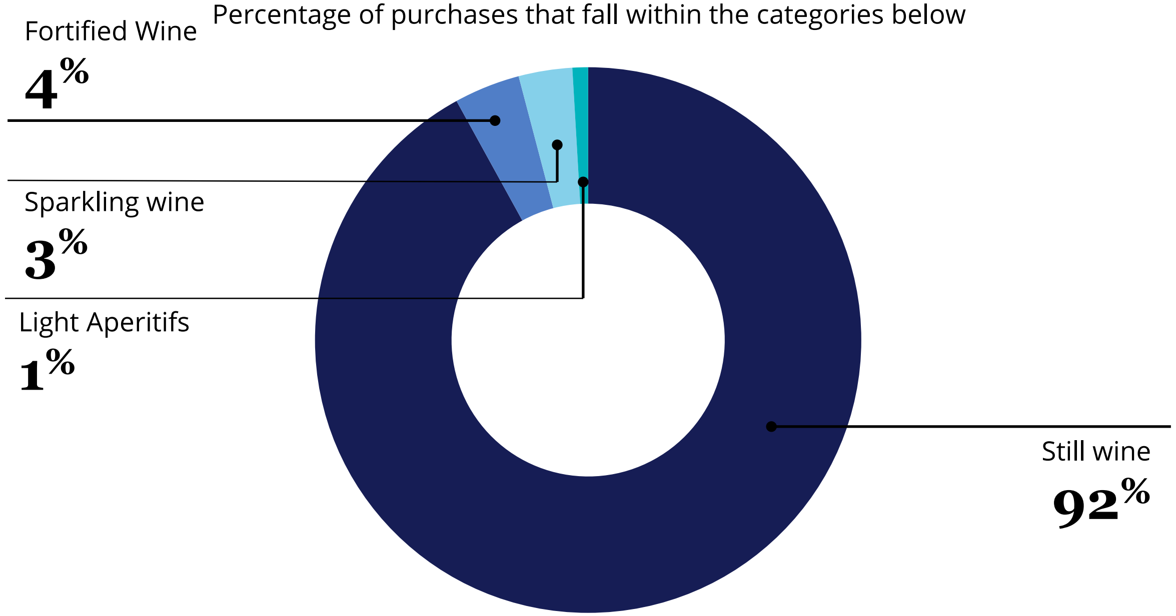
*Spirits includes whisky, gin and genever, vodka, agave-based spirits, national spirits and rum
**Wine includes still wine, sparkling wine, fortified wine and light aperitifs
Source: IWSR

# Total wine market volumes

## Still wine accounts for 85% of total wine volume. Future growth is expected in still wine and in sparkling, which enjoys the most positive outlook in Brazil

### Total wine share by category

Percentage of purchases that fall within the categories below




### Total wine volumes by category

000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Total Wine | 53,613.70 | 50,585.54 | 2.6% | 4.7% |
| Still Wine | 46,529.93 | 43,161.67 | 4.8% | 4.9% |
| Sparkling Wine | 3,624.30 | 4,069.67 | 4.9% | 6.9% |
| Other Wines | 2,562.20 | 2,480.97 | -16.3% | -2.0% |
| Light Aperitifs | 728.59 | 706.03 | -6.0% | -1.5% |
| Fortified Wine | 168.68 | 167.19 | 0.0% | 0.1% |

*Other Wines includes non-grape based wines
Source: IWSR

# Still wine volumes by origin

## Two-thirds of the wine consumed in Brazil is produced domestically. Chile and Argentina account for 24% of wine consumed. Wines from everywhere except Italy, South Africa, France and the US have seen growth

**Total still wine volumes and market share by origin**

000s 9-liter cases

| | | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 | Market Share |
|---|---|---|---|---|---|---|
| | Total | 46,461.83 | 43,059.52 | 4.9% | 5.1% | |
| 1 | Brazilian | 30,588.29 | 27,531.50 | 4.0% | 5.2% | 64% |
| 2 | Chilean | 7,270.14 | 7,041.71 | 5.6% | 3.7% | 16% |
| 3 | Argentinian | 3,020.37 | 3,309.97 | 16.7% | 4.5% | 8% |
| 4 | Portuguese | 2,381.54 | 2,429.12 | 9.3% | 6.5% | 6% |
| 5 | Italian | 1,209.23 | 1,015.78 | -2.4% | 8.8% | 2% |
| 6 | Spanish | 779.10 | 624.83 | 2.5% | 6.7% | 1% |
| 7 | French | 691.93 | 609.10 | 0.0% | 4.6% | 1% |
| 8 | Uruguayan | 373.69 | 363.60 | 11.9% | 1.9% | 1% |
| 9 | South African | 92.45 | 74.92 | -8.8% | 12.8% | 0% |
| 10 | US | 55.08 | 58.98 | -7.7% | 9.0% | 0% |

*International refers to wine where grapes are from multiple countries of origin
Source: IWSR

# Still wine retail price by origin

## Retail prices have risen for all countries of origin. Brazilian wine had the joint second lowest increase in prices between 2017 and 2022, starting from the lowest retail price per standard bottle

**Historic and forecast growth: Retail price**

Five-year CAGR % calculated using a variable exchange rate

| | | Retail price per 0.75l 2022 (US$) | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| | Total | 6.05 | 4.7% | -0.1% |
| 1 | Brazilian | 2.96 | 2.8% | 0.1% |
| 2 | Chilean | 9.87 | 2.8% | 0.2% |
| 3 | Argentinian | 12.88 | 5.2% | -0.1% |
| 4 | Portuguese | 13.61 | 5.5% | -0.6% |
| 5 | Italian | 10.73 | 4.3% | -0.2% |
| 6 | Spanish | 13.14 | 3.5% | -0.2% |
| 7 | French | 13.86 | 5.0% | -0.8% |
| 8 | Uruguayan | 8.92 | 10.7% | -0.4% |
| 9 | South African | 11.95 | 2.0% | -0.6% |
| 10 | US | 20.82 | 6.0% | -0.8% |

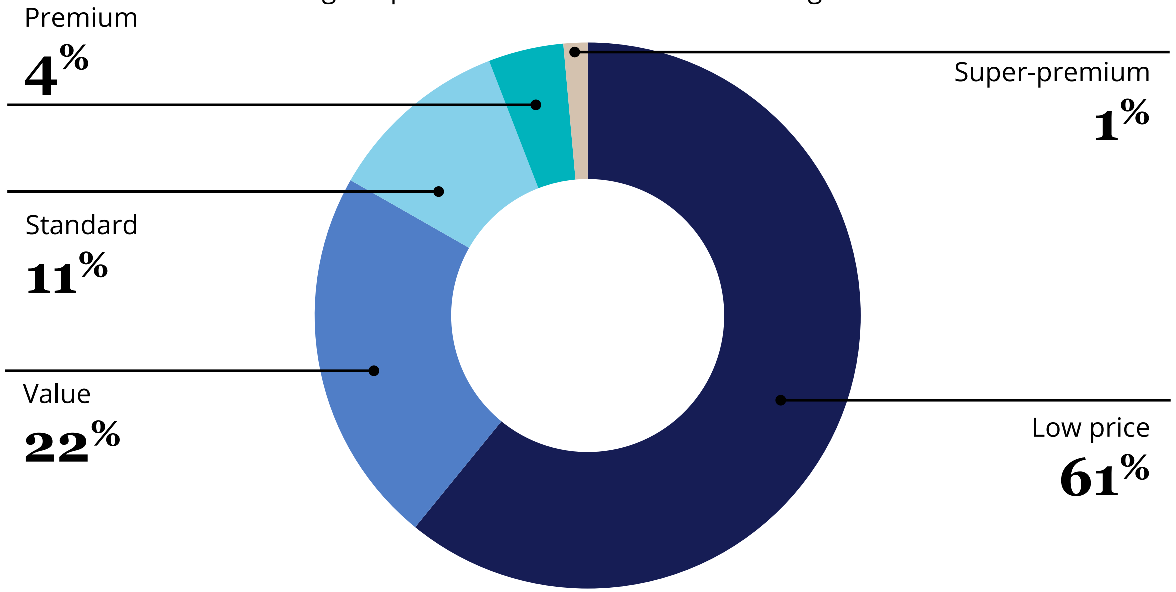
Source: IWSR

# Still wine by price band

Most wine in Brazil is low-priced, although volumes at that level have fallen from a post-pandemic peak. Low-priced and standard wines have lost volumes since 2021. Premium and higher-priced wine is growing fast

**Still wine by price band***

Percentage of purchases that fall within the categories below




**Still wine by price band**

000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Low-Price (under BRL 25.00) | 29,106.11 | 26,248.86 | 3.9% | 5.0% |
| Value (BRL 25.00 to 49.99) | 10,250.55 | 9,644.58 | 6.2% | 4.6% |
| Standard (BRL 50.00 to 74.99) | 5,052.39 | 4,687.17 | 5.6% | 5.7% |
| Premium (BRL 75.00 to 124.99) | 1,587.38 | 1,919.88 | 8.7% | 3.2% |
| Super Premium (BRL125.00 to BRL249.99) | 493.72 | 614.59 | 9.2% | 4.2% |
| Ultra Premium (BRL250.00 to BRL499.99) | 25.19 | 30.71 | 12.2% | 7.5% |
| Prestige (BRL500.00 to BRL999.99) | 14.58 | 15.88 | 27.3% | 9.9% |

*Ultra-premium and Prestige omitted from pie chart due to small market share (less than 1%)
Source: IWSR

# Still wine consumption per capita

## Brazilians drink on average 2.4 litres of still wine per person each year, ranking in the same position as in 2021. Per capita consumption has fallen from a 2021 peak of 2.6 litres but showed strong growth from 2017–22

**Per capita consumption of still wine**

Liters per annum (LDA+ population)

| | | 2021 | 2022 | CAGR 17-22 | CAGR 21-22 |
|---|---|---|---|---|---|
| 1 | St. Martin and St. Maarten | 46.7 | 49.0 | 12.3% | 5.0% |
| 2 | Portugal | 43.0 | 45.7 | -0.9% | 6.3% |
| 3 | Montenegro | 41.8 | 42.6 | -0.9% | 2.0% |
| 4 | Italy | 42.2 | 39.9 | -2.8% | -5.2% |
| 5 | Slovenia | 37.6 | 37.8 | -2.8% | 0.5% |
| 6 | St. Barths | 33.9 | 37.2 | 9.3% | 9.8% |
| 7 | Switzerland | 36.1 | 34.9 | -1.5% | -3.3% |
| 8 | France | 35.7 | 33.9 | -5.2% | -5.0% |
| 9 | Greece | 28.0 | 33.8 | 0.5% | 20.9% |
| 10 | Hungary | 31.5 | 32.7 | 0.6% | 3.6% |
| 11 | Denmark | 33.4 | 31.0 | -1.2% | -7.1% |
| 12 | Austria | 30.9 | 30.1 | -1.3% | -2.6% |
| 13 | Turks and Caicos | 27.6 | 30.1 | -2.9% | 9.2% |
| 14 | Romania | 27.5 | 27.9 | 2.4% | 1.2% |
| 15 | US Virgin Islands | 27.8 | 27.9 | -2.6% | 0.3% |
| | | | | | |
| 84 | Brazil | 2.6 | 2.4 | 3.1% | -8.3% |

Market context

"Despite the steady growth in volumes of quality wines, the category is still not fully developed, and per capita consumption remains relatively low."

*Executive Summary Report 2023, Brazil*

Source: IWSR

# Sparkling wine volumes by origin

## Domestic sparkling wine accounts for 83% of volume. There was a large increase in the volume of sparkling wine from Brazil, Spain and Argentina sold between 2017 and 2022

**Total sparkling wine volumes and market share by origin**

000s 9-litre cases

| | | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 | Market Share |
|---|---|---|---|---|---|---|
| | Total | 3,623.85 | 4,069.20 | 5.1% | 6.9% | |
| 1 | Brazilian | 3,052.09 | 3,364.88 | 5.4% | 6.1% | 83% |
| 2 | Spanish | 237.59 | 253.73 | 5.7% | 6.9% | 6% |
| 3 | French | 126.63 | 149.16 | -0.7% | 11.3% | 4% |
| 4 | Argentinian | 71.00 | 138.68 | 13.6% | 6.0% | 3% |
| 5 | Italian | 89.94 | 113.62 | -1.5% | 16.6% | 3% |
| 6 | Chilean | 32.30 | 34.70 | 1.5% | 18.5% | 1% |
| 7 | Portuguese | 9.07 | 9.09 | -6.9% | 11.3% | 0% |
| 8 | German | 3.23 | 3.24 | 13.1% | 19.2% | 0% |
| 9 | South African | 1.00 | 1.10 | -11.3% | 22.2% | 0% |
| 10 | International* | 1.00 | 1.00 | -24.2% | 0.0% | 0% |

Market context

“Sparkling wine is slowly becoming a less celebratory drink and more present throughout the year on a wide range of occasions.“

“The sparkling wine category had another fantastic year, with record-breaking sales. Growth came from an increase in the number of regular consumers, more consumption occasions such as aperitifs and mixed drinks, and increased investment in brand activations and distribution.“

*Executive Summary Report 2023, Brazil*

*International refers to wine where grapes are from multiple countries of origin
Source: IWSR

# Sparkling wine retail price by origin

## The average price point of a bottle of sparkling wine in Brazil increased between 2017 and 2022; the largest increase in price was seen in wine from France, including Champagne

**Historic and forecast growth for sparkling wine: Retail price**

Five-year CAGR % calculated using a variable exchange rate

| | | Retail price per 0.75l 2022 (US$) | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| | Total | 11.03 | 2.5% | -0.4% |
| 1 | Brazilian | 9.23 | 3.3% | -0.3% |
| 2 | Spanish | 14.67 | 0.5% | 0.1% |
| 3 | French | 40.99 | 6.1% | -5.3% |
| 4 | Argentinian | 12.22 | 3.8% | 0.4% |
| 5 | Italian | 14.03 | -0.5% | -1.5% |
| 6 | Chilean | 13.70 | 2.6% | 0.1% |
| 7 | Portuguese | 13.60 | 4.1% | 1.4% |
| 8 | German | 16.53 | 2.6% | -1.3% |
| 9 | South African | 13.55 | -1.8% | 0.0% |
| 10 | International* | 13.55 | 4.9% | 0.0% |

Market context

"Unlike most locally produced still wines, Brazilian sparkling wines are well-respected for their quality and often favoured over imports."

*Executive Summary Report 2023, Brazil*

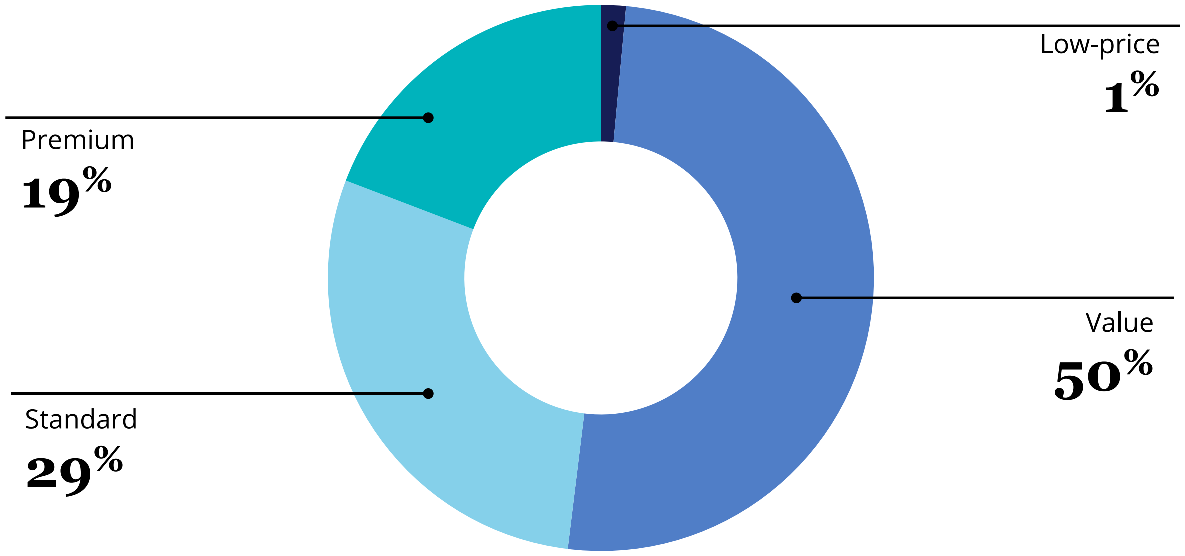
*International refers to wine where grapes are from multiple countries of origin
Source: IWSR

# Sparkling wine by price band

## There is an hourglass effect in sparkling wine in Brazil, with the largest increases in volumes in wine priced at value or below and at the super-premium level

### Sparkling wine by price brand**

Percentage of purchases that fall within the categories below




### Sparkling wine* volumes by price band

000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Low-Price (under BRL25.00) | 72.00 | 58.93 | 96.7% | 6.6% |
| Value (BRL25.00 to BRL49.99) | 1,731.34 | 2,020.22 | 15.8% | 6.9% |
| Standard (BRL50.00 to BRL74.99) | 1,078.25 | 1,155.72 | -4.1% | 8.2% |
| Premium (BRL75.00 to BRL124.99) | 694.27 | 768.36 | 0.4% | 5.1% |
| Super Premium (BRL125.00 to BRL249.99) | 5.59 | 17.70 | 35.7% | 11.1% |
| Ultra Premium (BRL250.00 to BRL499.99) | 1.07 | 1.49 | 8.3% | 7.1% |

Market context

"There are signs that curious, quality-driven consumers are willing to branch out and spend more."

*Executive Summary Report 2023, Brazil*

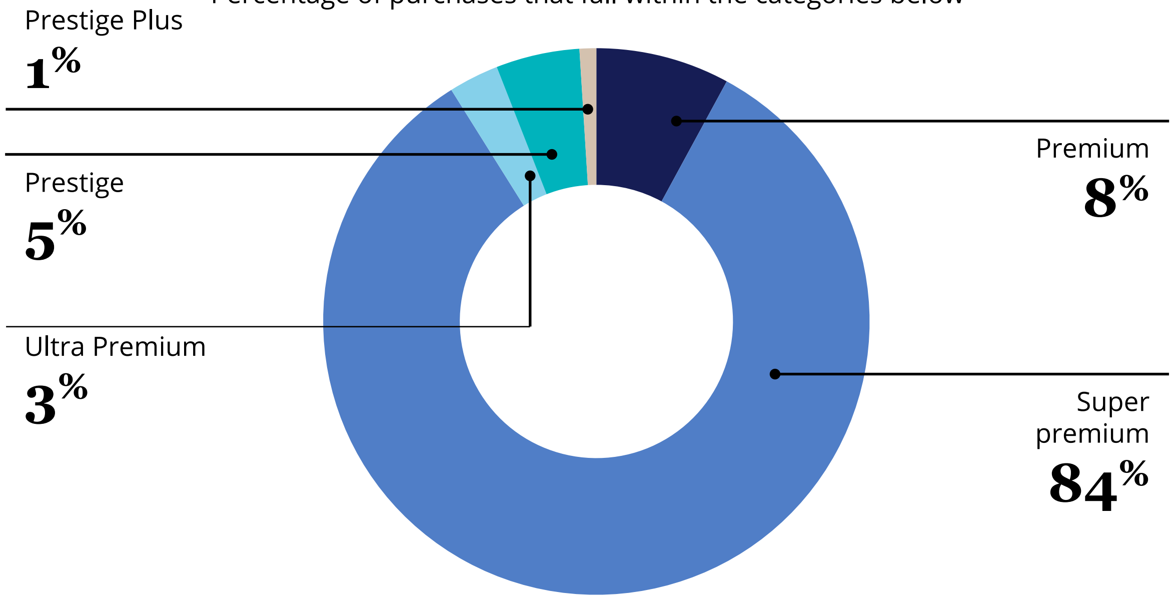
*Sparkling wine includes all sparkling wine types except Champagne, and includes no/low sparkling wine types
**Ultra-premium and Prestige omitted from pie chart due to small market share (less than 1%)
Source: IWSR

# Champagne by price band

86% of Champagne in the Brazilian market is sold at the super-premium price point. The fastest growth between 2017 and 2022 was in Champagne sold at ultra-premium prices, though from a relatively low base

### Champagne by price brand*

Percentage of purchases that fall within the categories below




### Champagne volumes by price band

000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Premium (under BRL 400.00) | 2.15 | 3.60 | -5.0% | 3.1% |
| Super Premium (BRL 400.00 to 699.99) | 35.92 | 39.77 | -1.8% | 2.0% |
| Ultra Premium (BRL 700.00 to 999.99) | 1.15 | 1.20 | 13.1% | 4.5% |
| Prestige (BRL 1000.00 to 1999.99) | 2.26 | 2.29 | 18.0% | 5.6% |
| Prestige Plus (BRL 2000.00 and over) | 0.30 | 0.40 | n/a | 4.6% |

*Percentage do not total to 100% due to rounding
Source: IWSR

# Sparkling wine consumption per capita

Brazilian consumption of sparkling wine is around 20cl per adult each year. It grew at a CAGR of 3.1% between 2017 and 22 and 11% between 2021 and 2022, highlighting growing interest in the category

**Per capita consumption of sparkling wine**

Liters per annum (LDA+ population)

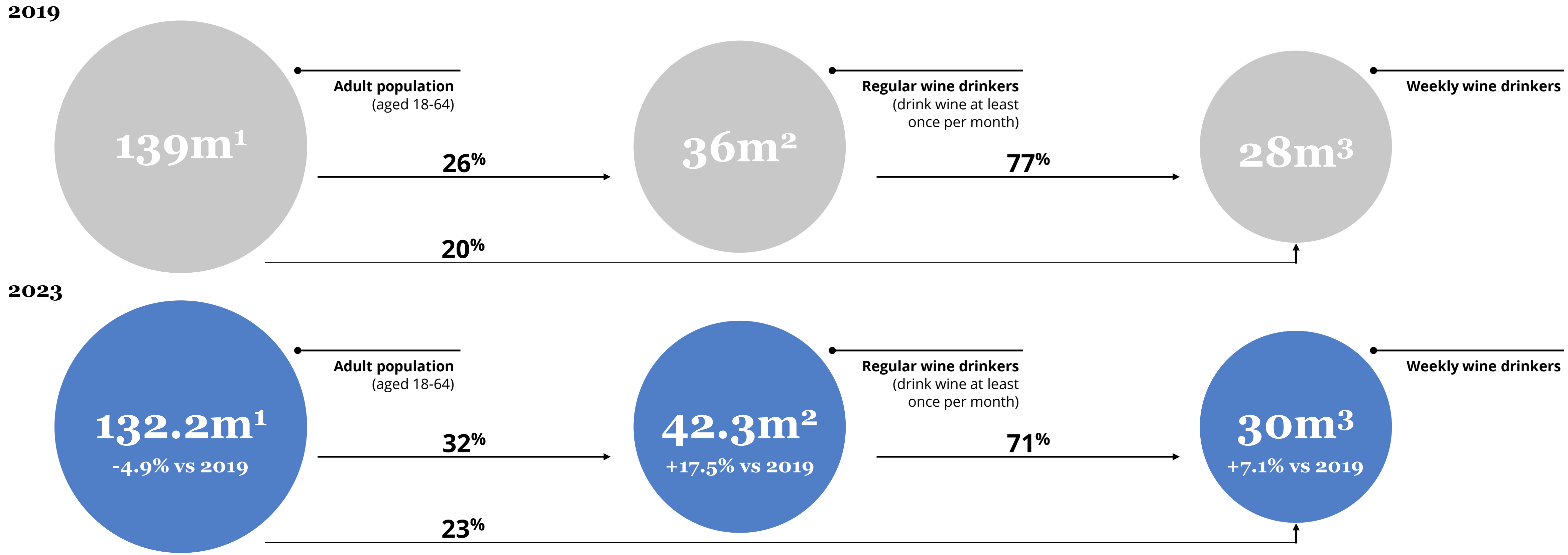
| | | 2021 | 2022 | CAGR 17-22 | CAGR 21-22 |
|---|---|---|---|---|---|
| 1 | St. Barths | 12.5 | 13.6 | 13.1% | 8.9% |
| 2 | St. Martin and St. Maarten | 6.3 | 8.3 | 21.7% | 32.6% |
| 3 | Italy | 7.9 | 7.4 | -1.2% | -6.2% |
| 4 | Turks and Caicos | 5.3 | 6.5 | -2.4% | 23.4% |
| 5 | Germany | 5.3 | 5.5 | -1.9% | 3.7% |
| 6 | Lithuania | 4.9 | 5.1 | 7.3% | 3.6% |
| 7 | Latvia | 4.5 | 4.9 | 2.6% | 9.4% |
| 8 | France | 4.7 | 4.9 | -1.3% | 2.7% |
| 9 | Guadeloupe | 4.2 | 4.8 | -1.8% | 15.5% |
| 10 | Martinique | 4.2 | 4.4 | -4.6% | 4.8% |
| 11 | Estonia | 4.1 | 4.3 | 4.0% | 6.3% |
| 12 | Belgium and Luxembourg | 4.3 | 4.3 | -1.5% | -0.2% |
| 13 | Austria | 3.4 | 3.5 | 0.3% | 2.9% |
| 14 | Switzerland | 3.2 | 3.3 | 0.9% | 3.0% |
| 15 | Cayman Islands | 3.1 | 3.3 | 2.1% | 5.8% |
| | | | | | |
| 83= | Brazil | 0.2 | 0.2 | 3.1% | 11.0% |

Source: IWSR

# Market Demographics

# Brazilian regular wine drinkers

The regular wine drinking population in Brazil has grown since 2019 despite the overall size of the adult population falling; a higher proportion of adults are engaged with the wine category




1 IBGE, 2019 estimated population. 2023 based on Census 2022 data

2 IWSR online calibration study, 2019 (n=876), rolling average of June 2022 and 2023, (n=2,019) Brazilian adults 18-64 years. Wine = still light wine (red, white, rosé)

3 IWSR, Vinitrac® Brazil, October 2019 and October 2023, (n≥706) Brazilian regular wine drinkers

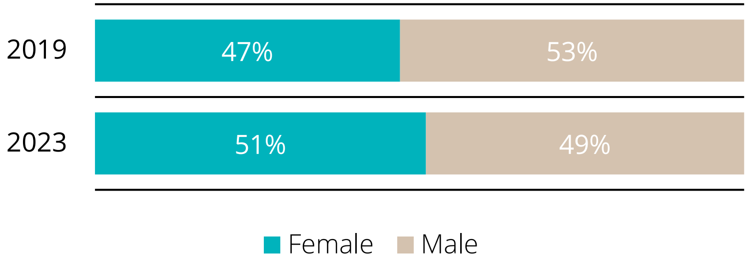
# Demographics

## The demographics of Brazilian regular wine drinkers have remained broadly stable since 2019, although the proportion of high earners has increased significantly, while a smaller proportion are on low incomes

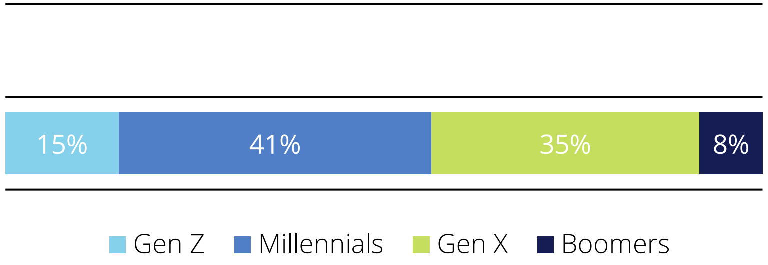
**Q Brazilian regular wine drinkers*, who are they?**

All regular wine drinkers in Brazil in 2023 compared with 2019

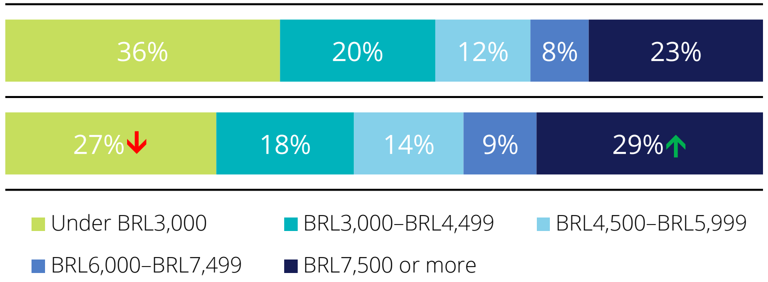
**Gender**




**Generations****




**Income**



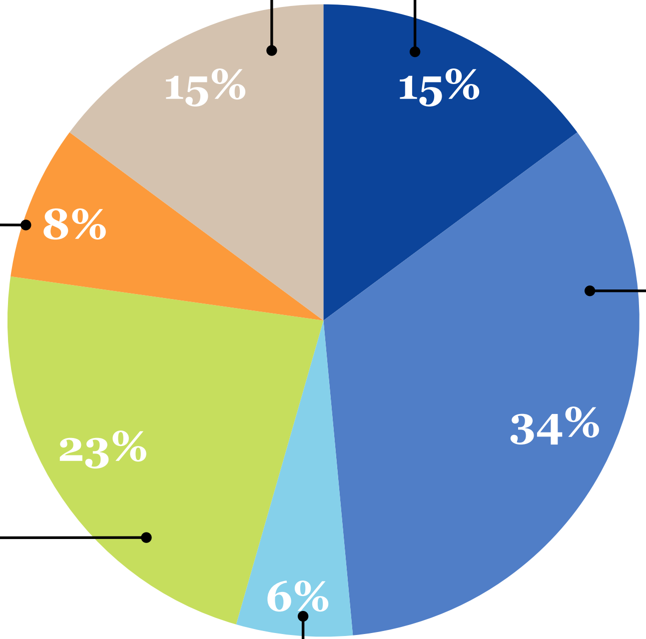

**Regions*****

| | 2019 | 2023 | Tracking |
|---|---|---|---|
| North | 7% | 7% | → |
| Northeast | 26% | 30% | ↑ |
| Southeast | 44% | 41% | → |
| South | 15% | 14% | → |
| Midwest | 8% | 7% | → |

Base: All Brazilian regular wine drinkers (n≥705);
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019 and October 2023 (n≥705), Brazilian regular wine drinkers
*Definition of regular wine drinkers: respondents who drink wine once a month. **Tracking not available for generations due to change to question. ***Regions below 5% are excluded from charting

# Brazil Portraits: wine drinker segmentation

## Enthusiastic Treaters account of the largest proportion of Brazilian regular wine drinkers in 2023, followed by Contented Treaters




**AT-HOME OCCASIONALS**
At-Home Occasionals are the oldest and least knowledgeable group of wine drinkers. They do not understand much about wine and prefer informal home settings when drinking wine, with a notable absence of wine consumption in the on-trade. They mostly purchase from supermarkets and hypermarkets and gravitate towards 'traditional' wines, often favouring red varieties.

**BARGAIN HUNTERS**
Bargain Hunters are an older demographic with moderate incomes who have the lowest confidence levels of all our Portrait groups. They drink wine infrequently, with prices and promotions significantly shaping their purchase decisions. These wine drinkers chiefly purchase from supermarkets and hypermarkets that often have wine on promotion. Bargain Hunters have the narrowest alcohol repertoires and will gravitate towards wines that are on offer.

**CONTENTED TREATERS**
Contented Treaters drink wine less frequently but opt for premium wines when doing so. Their wine consumption is often linked to social gatherings with friends or family. Contented Treaters use a range of retail channels including supermarkets, hypermarkets, specialist wine stores and delis. They prefer premium wines from well-established and mainstream brands.

**ENGAGED EXPLORERS**
Engaged Explorers are younger wine drinkers for whom wine is a vital element in their lifestyles, particularly in their vibrant social circles. This group willingly invests time and money on wine and relishes drinking it across a diverse range of occasions, both in the on- and off-trade. They have broad wine repertoires and enjoy trying different wines from their favourite producers.

**ENTHUSIASTIC TREATERS**
Enthusiastic Treaters are the youngest Portraits segment, often boasting a high involvement. Wine is central to their lifestyles: they have a strong interest in the category and are willing to pay for premium wines. They buy from higher-end outlets such as specialist wine stores, and on the internet and from wine clubs.

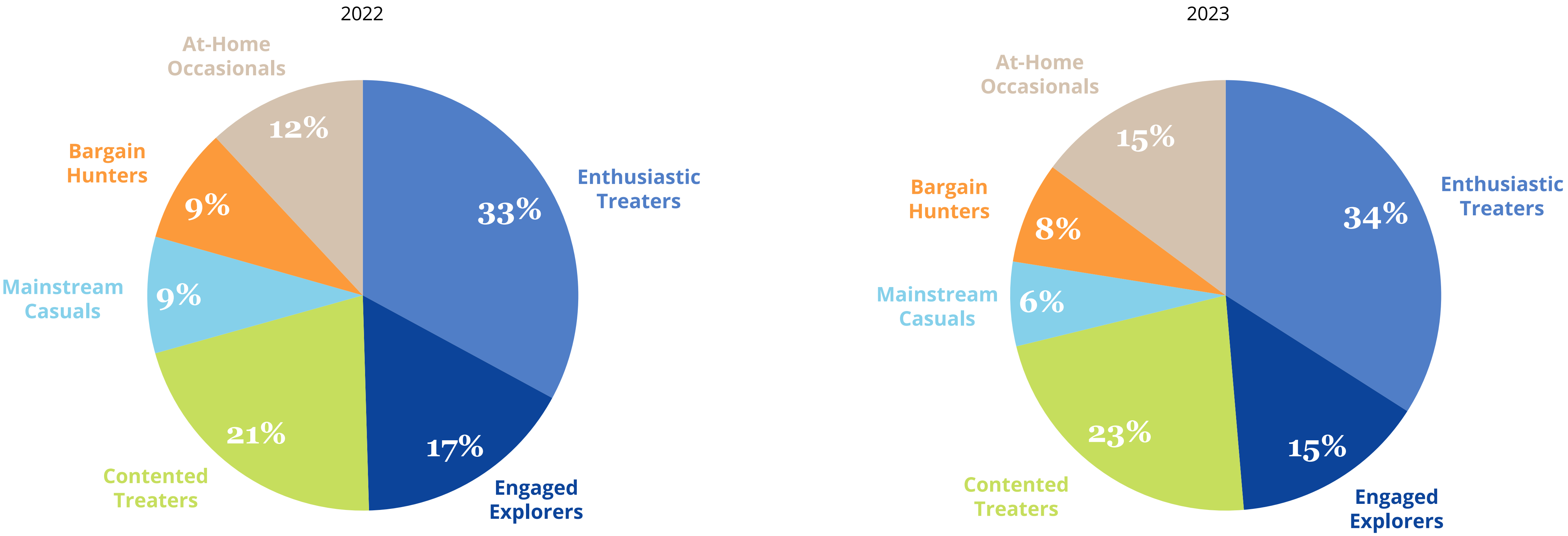
**MAINSTREAM CASUALS**
Mainstream Casuals are avid wine enthusiasts with moderate incomes who incorporate wine into their regular routines. They are particularly keen consumers of wine in domestic settings. They prefer to buy from easily accessible channels, predominantly supermarkets and hypermarkets that offer mainstream wines and good deals. Mainstream Casuals gravitate towards popular varietals, origins and brands.

Source: IWSR, Vinitrac® Brazil, October 2023 (n=705) Brazilian regular wine drinkers

# Brazil Portraits: wine drinker segmentation

The split between Brazilian regular wine drinker Portrait groups is consistent with last year. Enthusiastic Treaters and Contended Treaters remain the largest Portrait segments

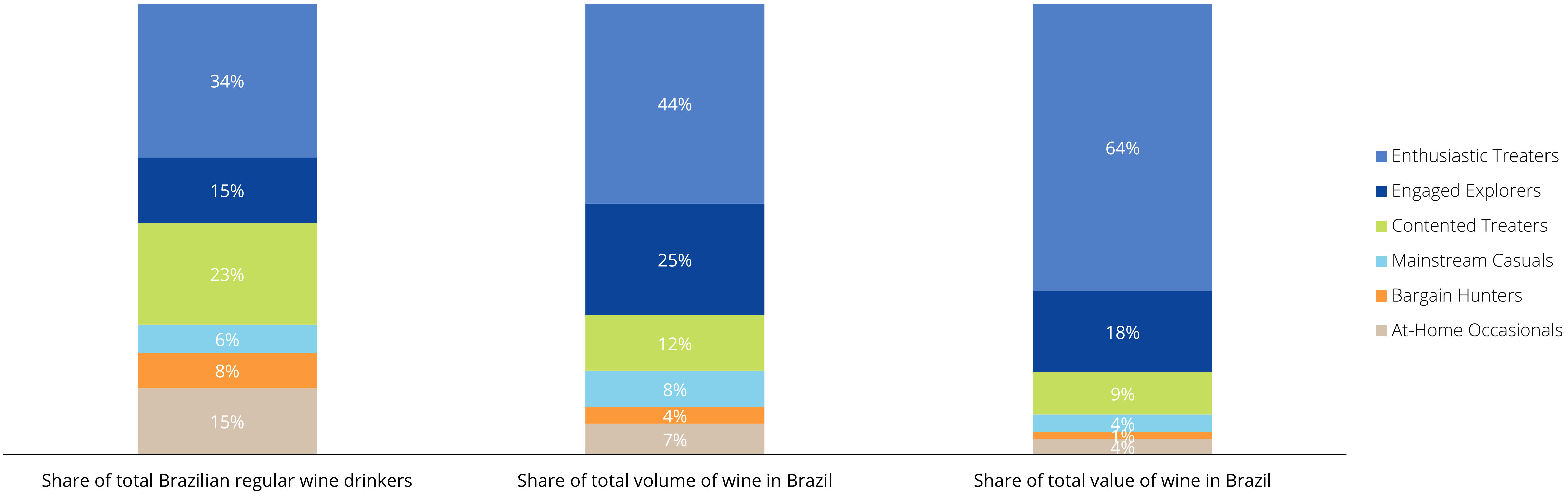
**Percentage share of population of Brazilian regular wine drinkers by Portraits segments Brazil 2022 vs 2023**




↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Brazil Portraits market sizing

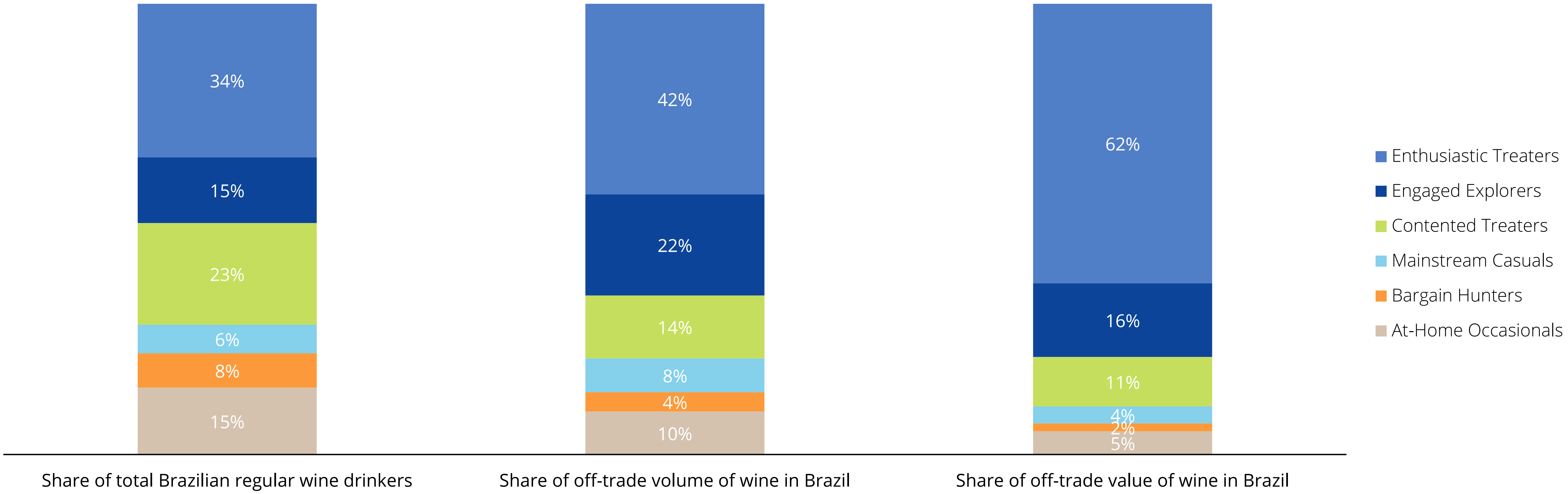
## Enthusiastic Treaters are the most important Portrait segment in Brazil, accounting for almost two-thirds of total wine market value, despite representing only a third of Brazilian regular wine drinkers




Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Brazil Portraits market sizing: off-trade

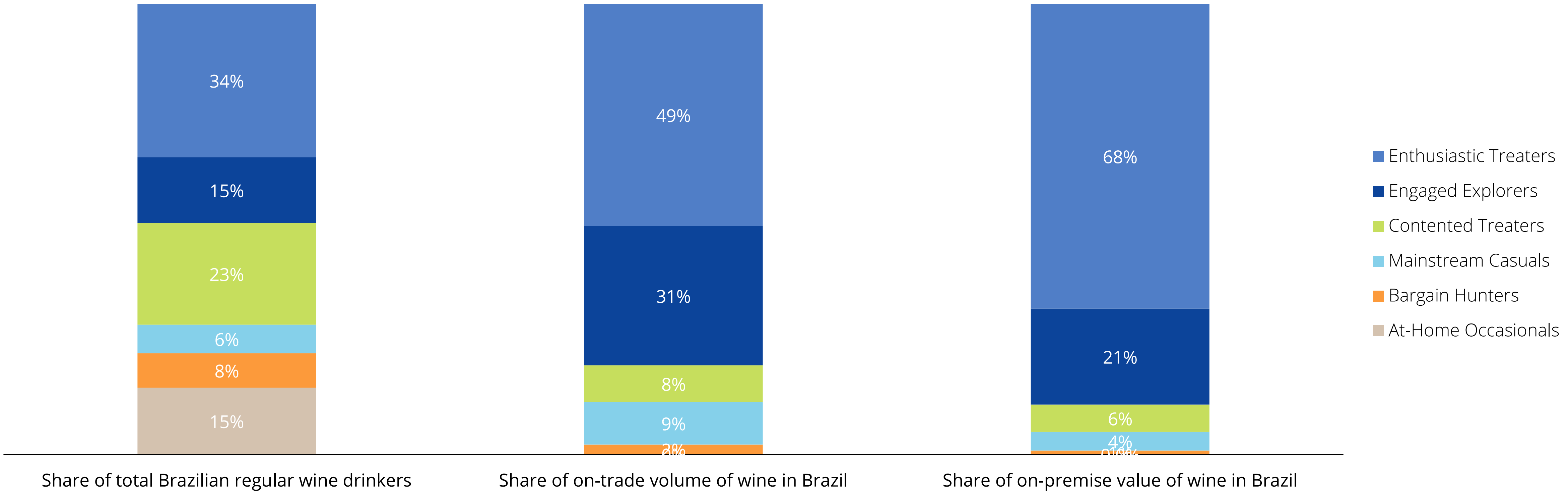
## Enthusiastic Treaters are the biggest group in the off-trade and account for 62% of total value, which highlights their importance to the category




Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, Oct '23 (n=705), Brazilian regular wine drinkers

# Brazil Portraits market sizing: on-trade

## The dominance of Enthusiastic Treaters in both volume and value is stronger in the on-trade. They account for half of total wine volumes and two-thirds of value sales




Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Drinking Repertoire

# Drinking repertoire

## Regular wine drinkers are consuming a narrower range of beverages than in 2019, with a notable decline in consumption of white wine; consumption of red wine has held steady over the same period

**Alcoholic beverage repertoire: Top 15 tracking**

Percentage who have drunk the following beverages in the past 12 months

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Red wine | 90% | 89% | 89% | → | → |
| 2 | Beer | 86% | 84% | 83% | → | → |
| 3 | White wine | 52% | 47% | 46% | ↓ | → |
| 4 | Vodka | 51% | 46% | 45% | ↓ | → |
| 5= | Whisky / Whiskey | 43% | 44% | 41% | → | → |
| 5= | Craft beer | 49% | 41% | 41% | ↓ | → |
| 7 | Rosé wine | 30% | 33% | 33% | → | → |
| 8 | Gin | 20% | 34% | 32% | ↑ | → |
| 9 | Sparkling wine from Brazil | 39% | 36% | 31% | ↓ | → |
| 10 | Cocktails | 27% | 26% | 30% | → | → |
| 11 | Pre-mixed / ready to drink alcoholic beverages | 26% | 29% | 28% | → | → |
| 12 | Liqueurs | 28% | 26% | 27% | → | → |
| 13 | Brandy / Cachaça | 33% | 26% | 25% | ↓ | → |
| 14 | Tequila | 29% | 26% | 23% | ↓ | → |
| 15= | Sweet / dessert wine | 21% | 23% | 19% | → | → |

Base: All Brazilian regular wine drinkers (n≥705); =Represents equal ranking

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Varietal consumption (1/2)

## Consumption of white varietals remains stable; Sauvignon Blanc, Moscato and Chardonnay enjoy a large lead of other grape varieties

**White varietal consumption: Tracking**

Percentage who have drunk the following varietals or wine types in the past six months

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1= | Sauvignon Blanc | 36% | 35% | 37% | → | → |
| 1= | Moscato | 34% | 36% | 37% | → | → |
| 1= | Chardonnay | 39% | 40% | 37% | → | → |
| 4 | Pinot Grigio / Pinot Gris | 16% | 18% | 18% | → | → |
| 5= | Chenin Blanc | 18% | 15% | 16% | → | → |
| 5= | Verdelho | 17% | 17% | 16% | → | → |
| 7 | Riesling | 16% | 15% | 13% | → | → |
| 8 | Sémillon | 16% | 15% | 12% | → | → |
| 9= | Albariño | 13% | 14% | 11% | → | → |
| 9= | Torrontés | 14% | 14% | 11% | → | → |
| 11 | Viognier | 13% | 10% | 10% | → | → |
| 12 | Colombard | 13% | 13% | 9% | ↓ | ↓ |
| 13 | Grüner Veltliner | 9% | 9% | 8% | → | → |
| 14 | Gewürztraminer | 9% | 8% | 7% | → | → |

Base: All Brazilian regular wine drinkers (n≥705); =Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Varietal consumption (2/2)

## Consumption of red varietals is broadly consistent, with regular wine drinkers' consumption of Malbec, Merlot and Cabernet Sauvignon way ahead of other varietals

**Red varietal consumption: Tracking**

Percentage who have drunk the following varietals or wine types in the past six months

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Malbec | 46% | 48% | 48% | → | → |
| 2= | Merlot | 44% | 46% | 45% | → | → |
| 2= | Cabernet Sauvignon | 42% | 43% | 45% | → | → |
| 4 | Pinot Noir | 26% | 29% | 26% | → | → |
| 5 | Carménère | 23% | 24% | 23% | → | → |
| 6= | Pinotage | 17% | 15% | 15% | → | → |
| 6= | Bonarda | 14% | 16% | 15% | → | → |
| 6= | Tannat | 14% | 17% | 15% | → | → |
| 6= | Tempranillo | 15% | 14% | 15% | → | → |
| 10 | Touriga Nacional | 14% | 14% | 14% | → | → |
| 11= | Primitivo | 14% | 14% | 11% | ↓ | → |
| 11= | Shiraz / Syrah | 12% | 11% | 11% | → | → |
| 11= | Sangiovese | 13% | 12% | 11% | → | → |
| 14= | Grenache / Garnacha | 10% | 12% | 10% | → | → |
| 14= | Gamay | 10% | 9% | 10% | → | → |
| 14= | Zinfandel | 8% | 7% | 10% | → | ↑ |

Base: All Brazilian regular wine drinkers (n≥705); =Represents equal ranking

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level

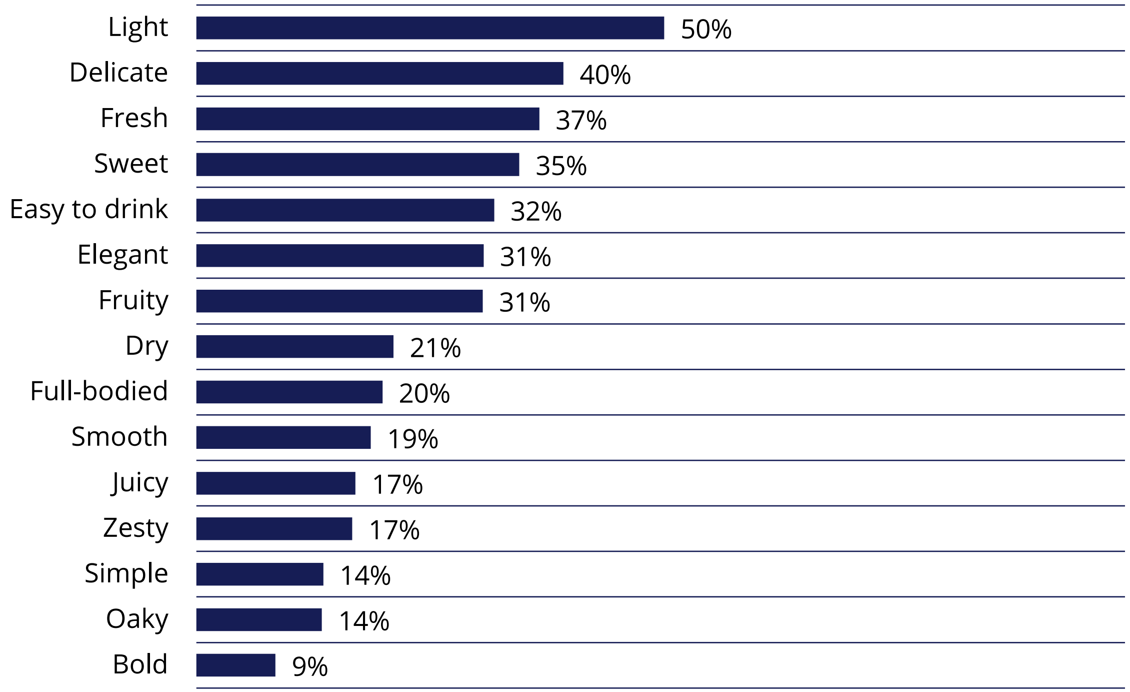
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Ideal wine attributes

## Brazilian regular wine drinkers prefer light white wine and savoury red wine by a considerable margin. Regular wine drinkers also say they appreciate sweetness and ease of drinking in both white and red wines

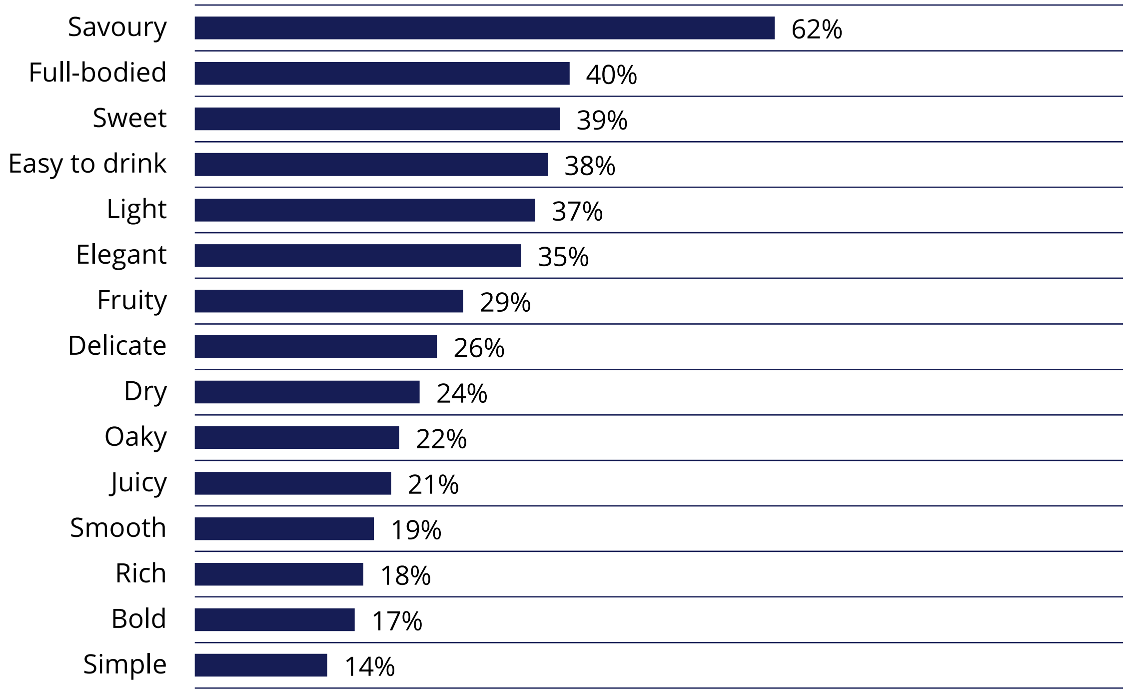
### Ideal white wine attributes: Top 15

Percentage who select each description for their ideal white wine




### Ideal red wine attributes: Top 15

Percentage who select each description for their ideal white wine



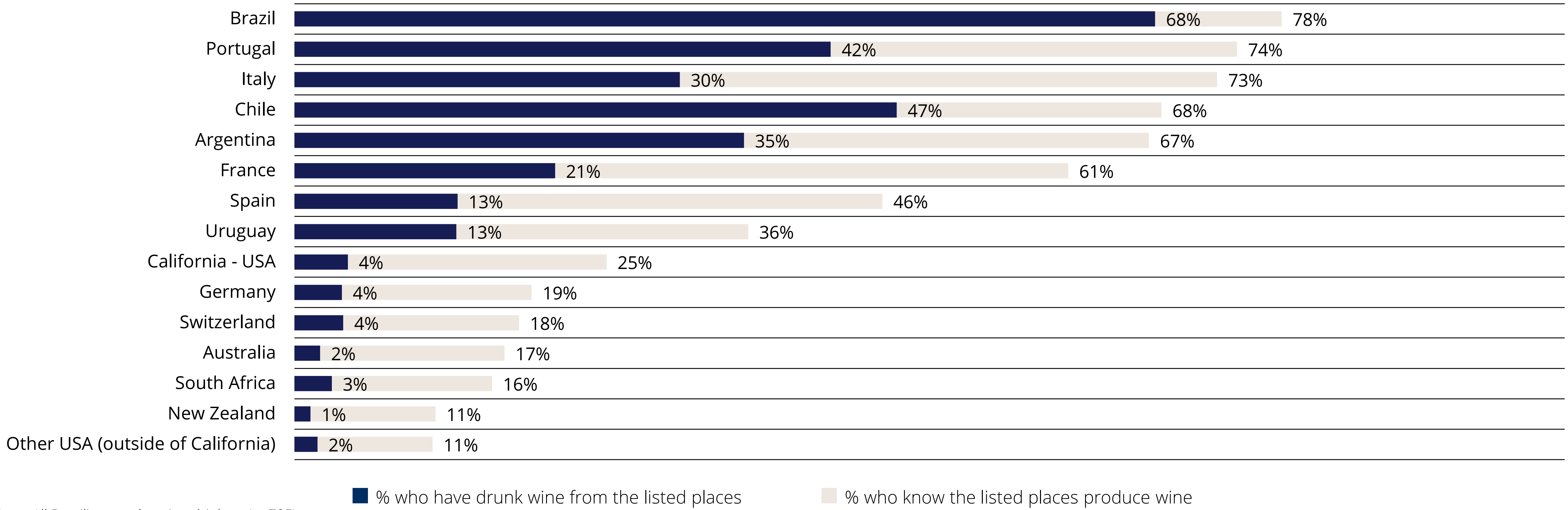

Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Country of origin awareness and consumption

## Domestically produced wine is popular among Brazilian regular wine drinkers; there is a large gap between the consumption of Brazilian wine and next biggest country of origin

**Country of origin: Top 15 awareness and consumption levels**

Percentage of those who know of or have drunk wine from the following places in the past six months




Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Country of origin awareness

## Awareness of wine producing countries is consistent with previous years, although the proportion of regular wine drinkers who are aware of Argentinian wine is significantly higher than in 2022

**Country of origin awareness: Tracking**

Percentage of those who know the following places produce wine

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Brazil | 81% | 77% | 78% | → | → |
| 2 | Portugal | 77% | 76% | 74% | → | → |
| 3 | Italy | 71% | 69% | 73% | → | → |
| 4 | Chile | 66% | 65% | 68% | → | → |
| 5 | Argentina | 65% | 61% | 67% | → | ↑ |
| 6 | France | 63% | 59% | 61% | → | → |
| 7 | Spain | 48% | 48% | 46% | → | → |
| 8 | Uruguay | 32% | 32% | 36% | → | → |
| 9 | California - USA | 26% | 20% | 25% | → | ↑ |
| 10 | Germany | 25% | 21% | 19% | ↓ | → |
| 11 | Switzerland | 18% | 20% | 18% | → | → |
| 12 | Australia | 18% | 14% | 17% | → | → |
| 13 | South Africa | 18% | 14% | 16% | → | → |
| 14= | New Zealand | 11% | 10% | 11% | → | → |
| 14= | Other USA (outside of California) | 13% | 10% | 11% | → | → |

Market context

"Argentina emerged as the big winner, with growth in almost all price segments, buoyed by more expensive brands that often take informal routes to arrive at discounted prices straight to consumers"

*Executive Summary Report 2023, Brazil*

Base: All Brazilian regular wine drinkers (n≥705); =Represents equal ranking

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Country of origin consumption

## A significantly smaller proportion of Brazilian regular wine drinkers are consuming domestically produced wine than in 2019

**Country of origin consumption: Tracking**

Percentage of those who have drunk wine from the following places in the past six months

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Brazil | 72% | 69% | 68% | ↓ | → |
| 2 | Chile | 47% | 45% | 47% | → | → |
| 3 | Portugal | 45% | 44% | 42% | → | → |
| 4 | Argentina | 33% | 33% | 35% | → | → |
| 5 | Italy | 31% | 27% | 30% | → | → |
| 6 | France | 21% | 20% | 21% | → | → |
| 7= | Spain | 15% | 13% | 13% | → | → |
| 7= | Uruguay | 10% | 10% | 13% | → | → |
| 9= | California - USA | 5% | 4% | 4% | → | → |
| 9= | Switzerland | 4% | 4% | 4% | → | → |
| 9= | Germany | 6% | 4% | 4% | ↓ | → |
| 12 | South Africa | 4% | 2% | 3% | → | → |
| 13= | Australia | 2% | 2% | 2% | → | → |
| 13= | Other USA (outside of California) | 2% | 2% | 2% | → | → |
| 15 | New Zealand | 2% | 2% | 1% | → | → |

Market context

"Domestic wines lost market share due to supply chain issues, tighter margins and difficulties in passing on extra costs to consumers. Entry-level wines from Chile, Portugal and Spain, which rely heavily on large retailers, experienced a year of stagnation"

*Executive Summary Report 2023, Brazil*

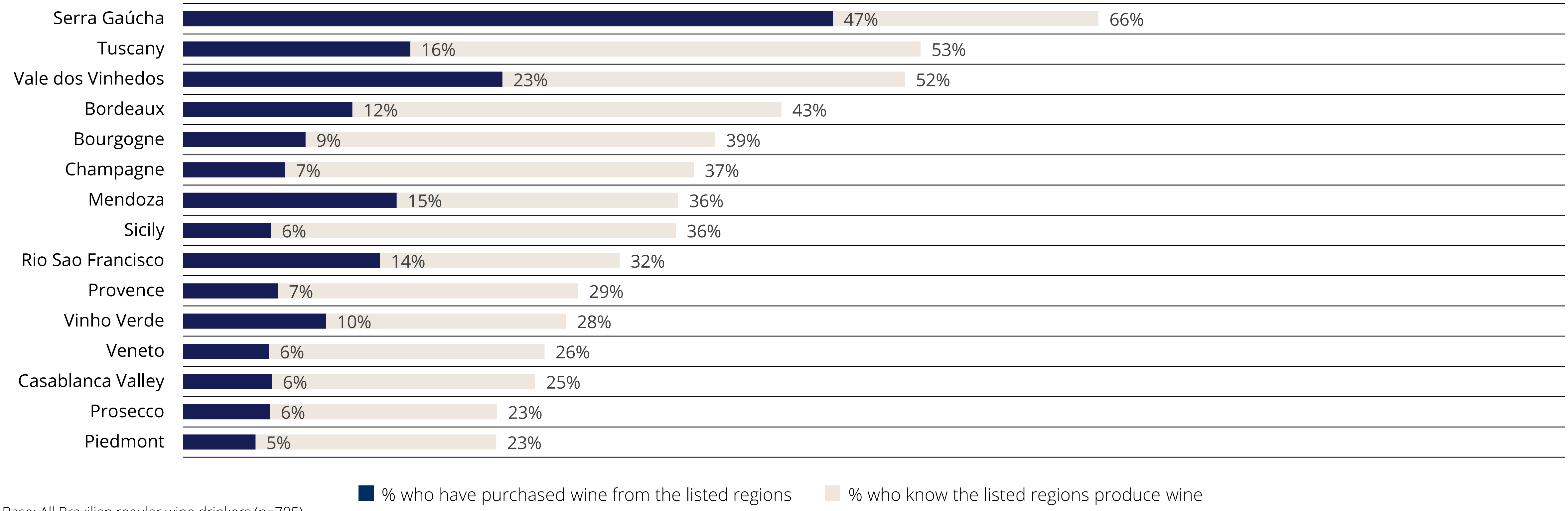
Base: All Brazilian regular wine drinkers (n≥705); = Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Region of origin awareness and purchase

Serra Gaúcha is the leading region for both awareness and purchase among Brazilian regular wine drinkers. Mendoza and Rio São Francisco have higher purchase rates relative to their awareness levels

**Region of origin: Top 15 awareness and purchase levels**

Percentage of those who know of or have purchased wine from the following regions in the past three months




Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Region of origin awareness

## Regional awareness among Brazilian regular wine drinkers is broadly stable, though significantly fewer are aware of Bordeaux and Prosecco than in 2019

**Region of origin awareness: Tracking**

Percentage of those who know the following places produce wine

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Serra Gaúcha | 66% | 63% | 66% | → | → |
| 2 | Tuscany | 55% | 54% | 53% | → | → |
| 3 | Vale dos Vinhedos | 49% | 51% | 52% | → | → |
| 4 | Bordeaux | 49% | 43% | 43% | ↓ | → |
| 5 | Bourgogne | 43% | 41% | 39% | → | → |
| 6 | Champagne | 34% | 35% | 37% | → | → |
| 7= | Mendoza | 38% | 33% | 36% | → | → |
| 7= | Sicily | 36% | 34% | 36% | → | → |
| 9 | Rio Sao Francisco | 34% | 27% | 32% | → | ↑ |
| 10 | Provence | 29% | 26% | 29% | → | → |
| 11 | Vinho Verde | 28% | 27% | 28% | → | → |
| 12 | Veneto | 28% | 26% | 26% | → | → |
| 13 | Casablanca Valley | 27% | 26% | 25% | → | → |
| 14= | Prosecco | 28% | 25% | 23% | ↓ | → |
| 14= | Piedmont | 25% | 23% | 23% | → | → |

Base: All Brazilian regular wine drinkers (n≥705); =Represents equal ranking

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022, October 2023 (n≥705), Brazilian regular wine drinkers

# Region of origin purchase

## Nearly half of Brazilian regular wine drinkers have purchased wines from Serra Gaúcha. Domestic regions of origin are represented most in the top five, joined by Mendoza and Tuscany

**Region of origin purchase: Tracking**

Percentage of those who have bought wine from the following regions in the past three months

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Serra Gaúcha | 47% | 48% | 47% | → | → |
| 2 | Vale dos Vinhedos | 19% | 24% | 23% | → | → |
| 3 | Tuscany | 19% | 18% | 16% | → | → |
| 4 | Mendoza | 16% | 15% | 15% | → | → |
| 5 | Rio Sao Francisco | 13% | 12% | 14% | → | → |
| 6 | Bordeaux | 15% | 15% | 12% | → | → |
| 7 | Vinho Verde | 10% | 10% | 10% | → | → |
| 8 | Bourgogne | 10% | 11% | 9% | → | → |
| 9= | Champagne | 9% | 8% | 7% | → | → |
| 9= | Provence | 5% | 6% | 7% | → | → |
| 11= | Casablanca Valley | 8% | 9% | 6% | → | → |
| 11= | Sicily | 8% | 7% | 6% | → | → |
| 11= | Prosecco | 8% | 6% | 6% | → | → |
| 11= | Veneto | 6% | 7% | 6% | → | → |
| 11= | Alentejo | 6% | 5% | 6% | → | → |

Base: All Brazilian regular wine drinkers (n≥705); = represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Wine-Buying Behaviours

# Wine-buying channel usage

## A significantly smaller proportion of Brazilian regular wine drinkers are using supermarkets, hypermarkets and online channels as avenues for purchasing wine

### Wine-buying channel usage: Tracking

Percentage who have bought wine from the following channels in the past six months

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Supermarkets (Hypermarkets) | 82% | 70% | 69% | ↓ | → |
| 2 | Shop specialised in wine or alcohol | 34% | 32% | 31% | → | → |
| 3 | From atacarejo | 28% | 24% | 28% | → | → |
| 4 | From a supermarket (hypermarket) website | n/a | 29% | 27% | n/a | → |
| 5 | Convenience stores | 29% | 26% | 26% | → | → |
| 6 | From an online retailer | n/a | 25% | 20% | n/a | ↓ |
| 7 | From a delivery app | n/a | 19% | 17% | n/a | → |
| 8= | Deli stores (Emporio) | 26% | 15% | 14% | ↓ | → |
| 8= | From a wine club | 19% | 11% | 14% | ↓ | → |
| 10 | From a winery during a visit | n/a | 13% | 12% | n/a | → |
| 11 | From a market place | n/a | 9% | 9% | n/a | → |
| 12 | From a winery's website | n/a | 9% | 8% | n/a | → |
| 13 | Duty free | 12% | 7% | 6% | ↓ | → |
| 14 | Direct from importers | 6% | 4% | 5% | → | → |

Base: All Brazilian regular wine drinkers (n≥705); = represents equal ranking; n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

Market context

"Online sales cooled, which can be attributed to the resumption of in-person shopping."

*Executive Summary Report 2023, Brazil*

# Wine-buying retailer usage

## Atacadão continues to be the primary retailer used to buy wine by Brazilian regular wine drinkers; significantly fewer respondents are using Extra than in 2019

### Wine-buying retailer usage Top 15: Tracking

Percentage who have bought wine from the following channels in the past six months

| Ranking '23 | | 2019 | 2022 | 2023 | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '19 | vs. '22 |
| 1 | Atacadão | 25% | 34% | 34% | ↑ | → |
| 2 | Carrefour | 34% | 32% | 33% | → | → |
| 3 | Pão de Açúcar | 22% | 23% | 20% | → | → |
| 4 | Extra | 29% | 19% | 17% | ↓ | → |
| 5 | wine.com.br | 13% | 13% | 11% | → | → |
| 6 | Sam's Club | 10% | 8% | 10% | → | → |
| 7 | Evino | 12% | 12% | 9% | → | → |
| 8 | Super Adega | n/a | 9% | 8% | n/a | → |
| 9 | Vinho & Ponto | 9% | 8% | 7% | → | → |
| 10 | Zaffari | 5% | 5% | 4% | → | → |
| 11= | Angeloni | 3% | 3% | 3% | → | → |
| 11= | Dia | 3% | 3% | 3% | → | → |
| 11= | Super Nosso | 1% | 1% | 3% | ↑ | ↑ |
| 11= | TodoVino | n/a | 4% | 3% | n/a | → |
| 11= | World Wine | 4% | 4% | 3% | → | → |

Base: Those who buy wine in the off-trade; = represents equal ranking; n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Consumption frequency

## The proportion of regular wine drinkers who consume wine daily or several times a week has declined significantly since 2019; this explains why lower volumes of wine are being sold in Brazil

### Wine consumption frequency: Tracking

Percentage who usually drink wine at the following frequency

| | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|
| Most days / every day | 10% | 7% | 6% | ↓ | → |
| 2-5 times a week | 36% | 37% | 31% | ↓ | ↓ |
| About once a week | 31% | 34% | 34% | → | → |
| 1-3 times a month | 23% | 22% | 29% | ↑ | ↑ |

### Wine consumption frequency: by generation

Percentage who usually drink wine at the following frequency

| | All Brazilian Regular Wine Drinkers (n=705) | Gen Z LDA-26 (n=106) | Millennials 27-42 (n=291) | Gen X 43-58 (n=249) | Boomers 59+ (n=59) |
|---|---|---|---|---|---|
| Most days / every day | 6% | 3% | 6% | 7% | 10% |
| 2-5 times a week | 31% | 36% | 31% | 28% | 32% |
| About once a week | 34% | 20% | 41% | 32% | 32% |
| 1-3 times a month | 29% | 41% | 22% | 33% | 27% |

Base: All Brazilian regular wine drinkers (n≥705)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Off-trade consumption frequency

## The decline in frequency of consumption among Brazilian regular wine drinkers can be explained by a fall in the proportion drinking at relaxed or informal meal occasions

**Off-trade: Wine consumption frequency by occasion**

Those who buy wine in the off-trade; table below shows the number of days per month that consumers are drinking wine at these occasions

| | 2019 | 2022 | 2023 | Tracking | |
|---|---|---|---|---|---|
| | | | | vs. '19 | vs. '22 |
| A relaxing drink at the end of the day at home | 8.40 | 8.58 | 7.45 | ↓ | ↓ |
| With an informal meal at home | 6.32 | 6.88 | 5.58 | ↓ | ↓ |
| With a more formal dinner party at home | 4.48 | 4.69 | 4.25 | → | → |
| At a party / celebration at home | 3.53 | 3.67 | 3.51 | → | → |

Base: Those who buy wine in the off-trade

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level

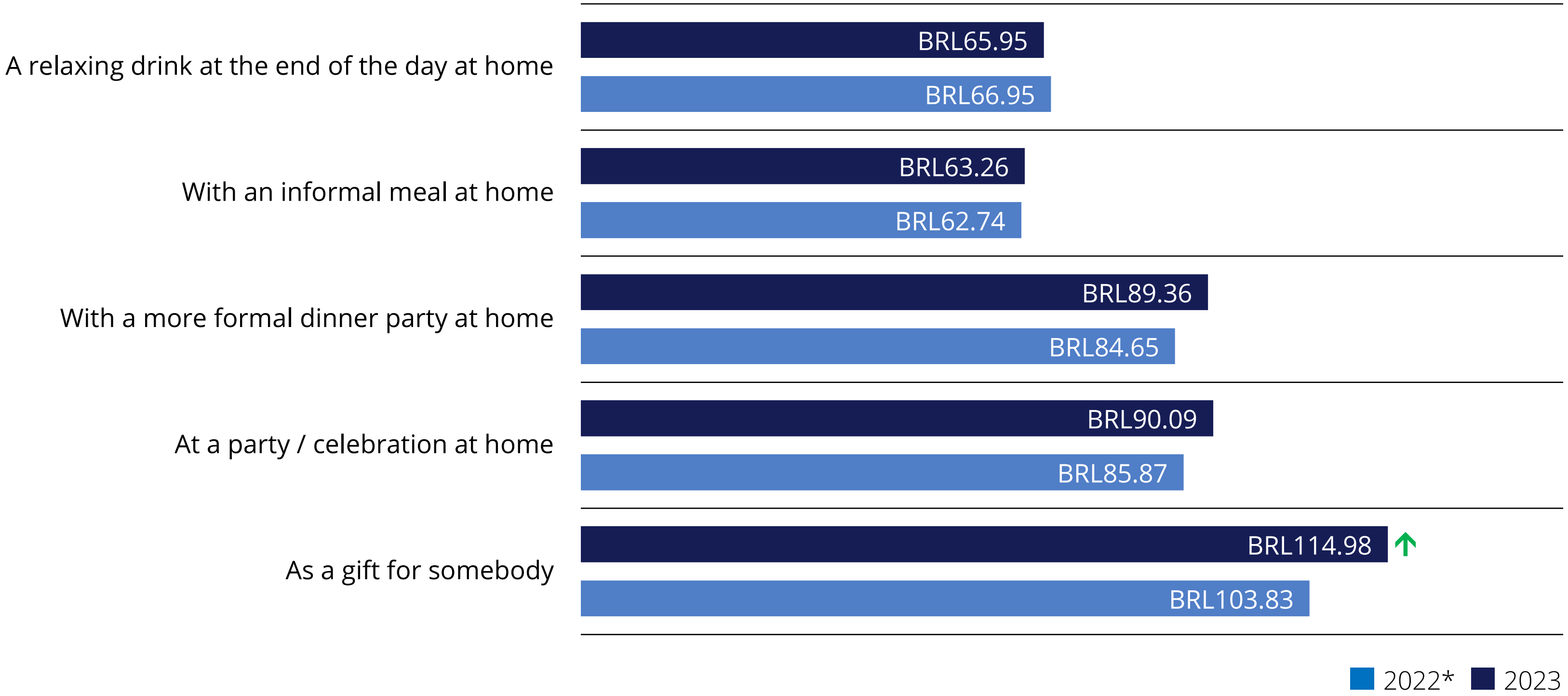
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Off-trade spend

## The typical per-bottle off-trade spend on wine for gifts has increased since last year, while spend across other occasions has seen no significant change

**Off-trade: Typical spend per bottle by occasion**

Those who buy wine in the off-trade




Market context

"Over the last 20 years there has been a surge in high-quality imported wines that operate in a completely different segment from most local wines. Despite the steady growth in volumes of quality wines, the category is still not fully developed, and per capita consumption remains relatively low."

*Executive Summary Report 2023, Brazil*

Base: Those who buy wine in the off-trade; *tracking not available prior to 2022
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# On-trade purchase

## After a peak in 2022, the purchase of wine in bars and pubs returned to 2019 levels. Boomers are significantly less likely to drink in the on-trade, while nine out 10 Gen Zs and Millennials are on-trade drinkers

### Wine purchase in on-trade

Percentage who buy wine in a bar, pub or restaurant

| On-trade location | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| Bar or pub | Yes | 56% | 61% | 54% | → | ↓ |
| | No | 44% | 39% | 46% | → | ↑ |
| Restaurant | Yes | 81% | 82% | 80% | → | → |
| | No | 19% | 18% | 20% | → | → |
| On-trade drinkers | Yes | 88% | 88% | 85% | → | → |
| | No | 12% | 12% | 15% | → | → |

### Wine purchase in on-trade: by generation

Percentage who buy wine in a bar, pub or restaurant

| On-trade location | | All Brazilian Regular Wine Drinkers (n=705) | Gen Z LDA-26 (n=106) | Millennials 27-42 (n=291) | Gen X 43-58 (n=249) | Boomers 59+ (n=59) |
|---|---|---|---|---|---|---|
| Bar or pub | Yes | 54% | 65% | 60% | 46% | 36% |
| | No | 46% | 35% | 40% | 54% | 64% |
| Restaurant | Yes | 80% | 79% | 85% | 77% | 70% |
| | No | 20% | 21% | 15% | 23% | 30% |
| On-trade drinkers | Yes | 85% | 91% | 89% | 81% | 73% |
| | No | 15% | 9% | 11% | 19% | 27% |

Base: All Brazilian regular wine drinkers (n≥705)

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# On-trade consumption frequency

## The frequency of drinking wine with formal meals in restaurants has decreased. The consumption frequency of regular wine drinkers is stable across other occasions

**On-trade: Wine consumption frequency by occasion**

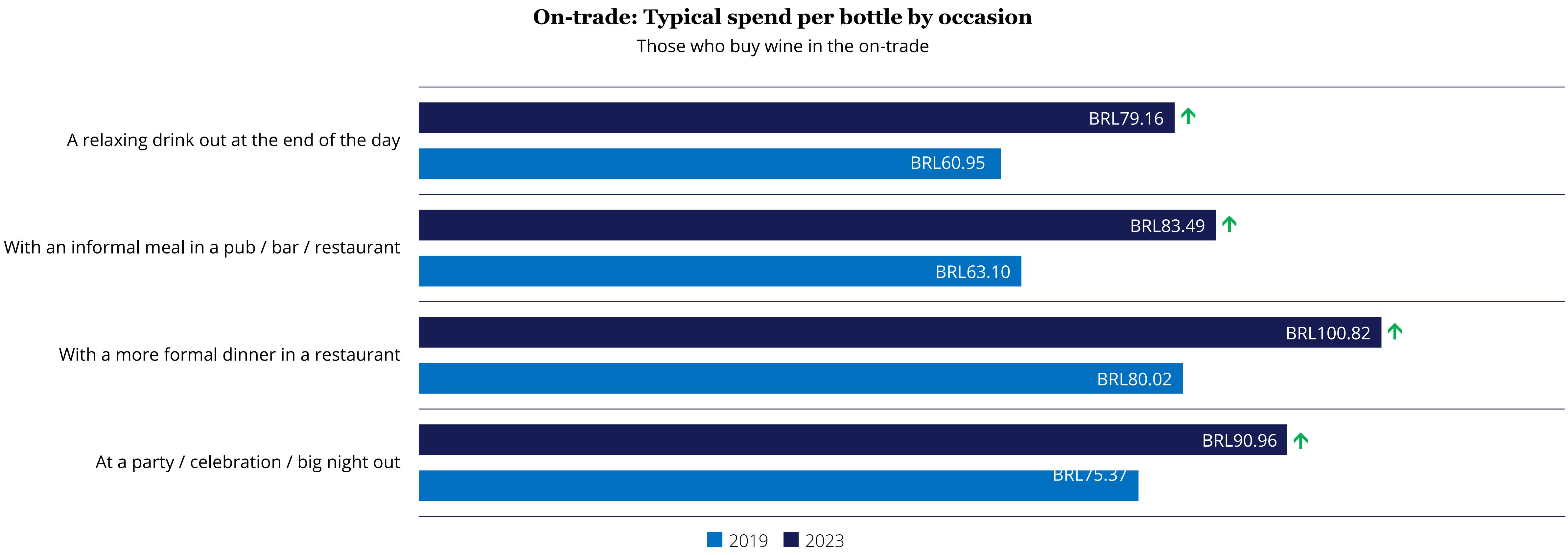
Those who buy wine in the on-trade

| | 2019 | 2022 | 2023 | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|
| A relaxing drink out at the end of the day | 5.10 | 5.46 | 4.96 | → | → |
| With an informal meal in a pub / bar / restaurant | 3.77 | 3.53 | 3.47 | → | → |
| With a more formal dinner in a restaurant | 3.65 | 3.60 | 3.19 | ↓ | → |
| At a party / celebration / big night out | 2.92 | 2.96 | 3.03 | → | → |

Base: Those who buy wine in the on-trade. Table shows the number of days per month that consumers are drinking wine at these occasions
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# On-trade spend

## Regular wine drinkers' typical on-trade spend is significantly higher across all occasions in 2023 than in 2019




Base: Those who buy wine in the on-trade
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019 and October 2023 (n≥705), Brazilian regular wine drinkers

# Wine Views and Attitudes

# Attitudes towards wine

## Brazilian regular wine drinkers are less willing to experiment with their wine selections than in 2019; this is the result of a greater proportion of 55–64s being involved in the category

### Attitudes towards wine: Tracking

Percentage who 'agree' or 'strongly agree' with the following statements

| | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|
| I enjoy trying new and different styles of wine on a regular basis | 80% | 70% | 70% | ↓ | → |
| I don't mind what I buy so long as the price is right | 7% | 9% | 9% | → | → |
| I know what I like and I tend to stick to what I know | 13% | 21% | 22% | ↑ | → |

### Attitudes towards wine by generation

Percentage who 'agree' or 'strongly agree' with the following statements

| | All Brazilian Regular Wine Drinkers (n=705) | Gen Z LDA-26 (n=106) | Millennials 27-42 (n=291) | Gen X 43-58 (n=249) | Boomers 59+ (n=59) |
|---|---|---|---|---|---|
| I enjoy trying new and different styles of wine on a regular basis | 70% | 75% | 76% | 64% | 57% |
| I don't mind what I buy so long as the price is right | 9% | 12% | 7% | 9% | 8% |
| I know what I like and I tend to stick to what I know | 22% | 13% | 17% | 27% | 35% |

Base: All Brazilian regular wine drinkers (n≥705)

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Wine involvement

## There has been a significant fall in regular wine drinkers with low levels of involvement and an increase in those with medium involvement, caused by a decreasing proportion of Gen Zs, who tend to be less involved

**Wine involvement: Tracking**

| | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|
| High involvement | 33% | 37% | 35% | → | → |
| Medium involvement | 39% | 40% | 44% | ↑ | → |
| Low involvement | 28% | 23% | 22% | ↓ | → |

**Wine involvement by generation**

| | All Brazilian Regular Wine Drinkers (n=705) | Gen Z LDA-26 (n=106) | Millennials 27-42 (n=291) | Gen X 43-58 (n=249) | Boomers 59+ (n=59) |
|---|---|---|---|---|---|
| High involvement | 35% | 23% | 39% | 38% | 24% |
| Medium involvement | 44% | 47% | 43% | 42% | 49% |
| Low involvement | 22% | 30% | 18% | 20% | 28% |

Base: All Brazilian regular wine drinkers (n≥705)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Involvement and perceived expertise

## Although the wine drinking population in Brazil has grown, this has not diluted the enthusiasm of regular wine drinkers; a significantly greater proportion of them now say they have a strong interest in wine

**Involvement and perceived expertise in wine: Tracking**

Percentage who 'agree' or 'strongly agree' with the following statements

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Drinking wine gives me pleasure | 92% | 94% | 95% | ↑ | → |
| 2 | I always look for the best quality wines I can get for my budget | 89% | 91% | 91% | → | → |
| 3 | Deciding which wine to buy is an important decision | 85% | 88% | 90% | ↑ | → |
| 4 | I have a strong interest in wine | 84% | 88% | 89% | ↑ | → |
| 5 | I like to take my time when I purchase a bottle of wine | 73% | 78% | 80% | ↑ | → |
| 6 | Wine is important to me in my lifestyle | 76% | 78% | 79% | → | → |
| 7 | Generally speaking, wine is reasonably priced | 70% | 74% | 73% | → | → |
| 8= | Generally speaking, wine is an expensive drink | 59% | 55% | 58% | → | → |
| 8= | Compared to others, I know less about the subject of wine | 58% | 55% | 58% | → | → |
| 10 | I feel competent about my knowledge of wine | 54% | 61% | 56% | → | ↓ |
| 11 | I don't understand much about wine | 40% | 39% | 36% | → | → |

Base: All Brazilian regular wine drinkers (n≥705)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Involvement and perceived expertise

## Millennials are the most confident age group, with 64% saying they feel competent about their wine knowledge, significantly higher than for all regular wine drinkers. Boomers are the least confident and most price-sensitive

### Involvement and perceived expertise in wine by generation

Percentage who ‘agree’ or ‘strongly agree’ with the following statements

| Ranking '23 | | All Brazilian Regular Wine Drinkers (n=705) | Gen Z LDA-26 (n=106) | Millennials 27-42 (n=291) | Gen X 43-58 (n=249) | Boomers 59+ (n=59) |
|---|---|---|---|---|---|---|
| 1 | Drinking wine gives me pleasure | 95% | 89% | 95% | 96% | 98% |
| 2 | I always look for the best quality wines I can get for my budget | 91% | 87% | 91% | 92% | 90% |
| 3 | Deciding which wine to buy is an important decision | 90% | 82% | 90% | 92% | 87% |
| 4 | I have a strong interest in wine | 89% | 85% | 89% | 91% | 87% |
| 5 | I like to take my time when I purchase a bottle of wine | 80% | 79% | 83% | 79% | 76% |
| 6 | Wine is important to me in my lifestyle | 79% | 73% | 81% | 83% | 69% |
| 7 | Generally speaking, wine is reasonably priced | 73% | 58% | 76% | 77% | 74% |
| 8= | Generally speaking, wine is an expensive drink | 58% | 62% | 53% | 58% | 74% |
| 8= | Compared to others, I know less about the subject of wine | 58% | 54% | 56% | 58% | 70% |
| 10 | I feel competent about my knowledge of wine | 56% | 57% | 64% | 50% | 43% |
| 11 | I don’t understand much about wine | 36% | 29% | 31% | 40% | 52% |

Base: All Brazilian regular wine drinkers (n=705)
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Wine knowledge and confidence indices

## Wine knowledge among Brazilian regular wine drinkers is on a downward trend; this is a wider market trend that has not been driven by the changing demographics of regular wine drinkers

### Wine knowledge index: Tracking[1]

Wine knowledge index is the 'objective' measurement of consumer knowledge about wine

| | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|
| Knowledge Index | 29.2 | 26.5 | 27.5 | ↓ | → |

### Wine confidence index: Tracking[2]

Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge

| | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|
| Confidence Index | 52.4 | 55.7 | 54.1 | → | → |

[1]Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
[2]Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
Base: All Brazilian regular wine drinkers (n≥705); ↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Wine-drinking motivations

## A significantly smaller proportion of regular wine drinkers say drinking wine makes them feel relaxed, which helps explain the fall in frequency of consumption at relaxed and informal meal occasions in the off-trade

### Wine drinking motivations: Tracking

Percentage who 'agree' or 'strongly agree' with the following statements

| Ranking '23 | | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '22 |
|---|---|---|---|---|
| 1 | I really love the taste of wine | 74% | 73% | → |
| 2 | Drinking wine makes me feel relaxed | 72% | 68% | ↓ |
| 3 | To celebrate special occasions | 63% | 64% | → |
| 4 | Drinking wine can be good for my health | 57% | 58% | → |
| 5 | Wine helps create a warm / friendly atmosphere | 51% | 53% | → |
| 6= | Wine enhances food and meals | 52% | 48% | → |
| 6= | I like learning about new wines | 50% | 48% | → |
| 8 | Wine is about sharing with a partner / close friend or family member | 46% | 43% | → |
| 9 | I like shopping / choosing wines to drink | 48% | 42% | ↓ |
| 10 | I treat myself with wine at the end of the day | 37% | 35% | → |
| 11 | Wine is about sharing something with others | 36% | 34% | → |
| 12 | Wine is a refreshing drink | 28% | 29% | → |
| 13 | It makes people sophisticated | 26% | 25% | → |
| 14 | It makes me feel individual and unique | 19% | 21% | → |
| 15 | Most of my friends drink wine | 18% | 19% | → |
| 16 | Wine is a fashionable drink | 15% | 13% | → |

Base: All Brazilian regular wine drinkers (n≥705); = Represents equal ranking
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Wine-drinking motivations

## Positive health perceptions are a key motivation, but there are noticeable differences in their importance between generational groups. Significantly more Boomers say that wine enhances food and meals

**Wine drinking motivations by generation**

Percentage who 'agree' or 'strongly agree' with the following statements

| Ranking '23 | | All Brazilian Regular Wine Drinkers (n=705) | Gen Z LDA-26 (n=106) | Millennials 27-42 (n=291) | Gen X 43-58 (n=249) | Boomers 59+ (n=59) |
|---|---|---|---|---|---|---|
| 1 | I really love the taste of wine | 73% | 73% | 73% | 71% | 77% |
| 2 | Drinking wine makes me feel relaxed | 68% | 68% | 67% | 67% | 70% |
| 3 | To celebrate special occasions | 64% | 57% | 65% | 64% | 70% |
| 4 | Drinking wine can be good for my health | 58% | 41% | 53% | 67% | 77% |
| 5 | Wine helps create a warm / friendly atmosphere | 53% | 45% | 51% | 56% | 65% |
| 6= | Wine enhances food and meals | 48% | 47% | 45% | 49% | 63% |
| 6= | I like learning about new wines | 48% | 45% | 52% | 45% | 47% |
| 8 | Wine is about sharing with a partner / close friend or family member | 43% | 38% | 42% | 46% | 39% |
| 9 | I like shopping / choosing wines to drink | 42% | 43% | 43% | 42% | 44% |
| 10 | I treat myself with wine at the end of the day | 35% | 31% | 38% | 36% | 26% |
| 11 | Wine is about sharing something with others | 34% | 33% | 33% | 35% | 35% |
| 12 | Wine is a refreshing drink | 29% | 35% | 28% | 27% | 33% |
| 13 | It makes people sophisticated | 25% | 32% | 26% | 22% | 20% |
| 14 | It makes me feel individual and unique | 21% | 23% | 19% | 22% | 20% |
| 15 | Most of my friends drink wine | 19% | 14% | 17% | 21% | 25% |
| 16 | Wine is a fashionable drink | 13% | 17% | 11% | 13% | 15% |

Base: All Brazilian regular wine drinkers (n=705)
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Wine-buying choice cues

## Descriptions on shelves and labels have increased in importance for Brazilian regular wine drinkers in recent years, while recommendations from shop staff and wine critics have become less important

**Wine choice cues: Tracking**

Percentage who indicate each of the following factors is 'important' or 'very important' when buying wine

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | A brand I am aware of | 87% | 89% | 89% | → | → |
| 2 | Taste or wine style descriptions displayed on the shelves or on wine labels | 81% | 85% | 86% | ↑ | → |
| 3 | Wine that matches or complements food | 83% | 87% | 85% | → | → |
| 4 | Grape variety | 81% | 83% | 84% | → | → |
| 5 | Recommendation by friend or family | 78% | 80% | 78% | → | → |
| 6 | The country of origin | 75% | 76% | 77% | → | → |
| 7 | The region of origin | 74% | 73% | 74% | → | → |
| 8 | Recommendation by wine guide books | 71% | 75% | 73% | → | → |
| 9 | Alcohol content | 69% | 71% | 72% | → | → |
| 10 | Promotional offer | 74% | 74% | 71% | → | → |
| 11 | Appeal of the bottle and / or label design | 60% | 64% | 60% | → | → |
| 12 | Recommendations from shop staff or shop leaflets | 62% | 62% | 55% | ↓ | ↓ |
| 13 | Whether or not the wine has won a medal or award | 56% | 58% | 52% | → | ↓ |
| 14 | Recommendation by wine critic or writer | 55% | 55% | 50% | ↓ | ↓ |

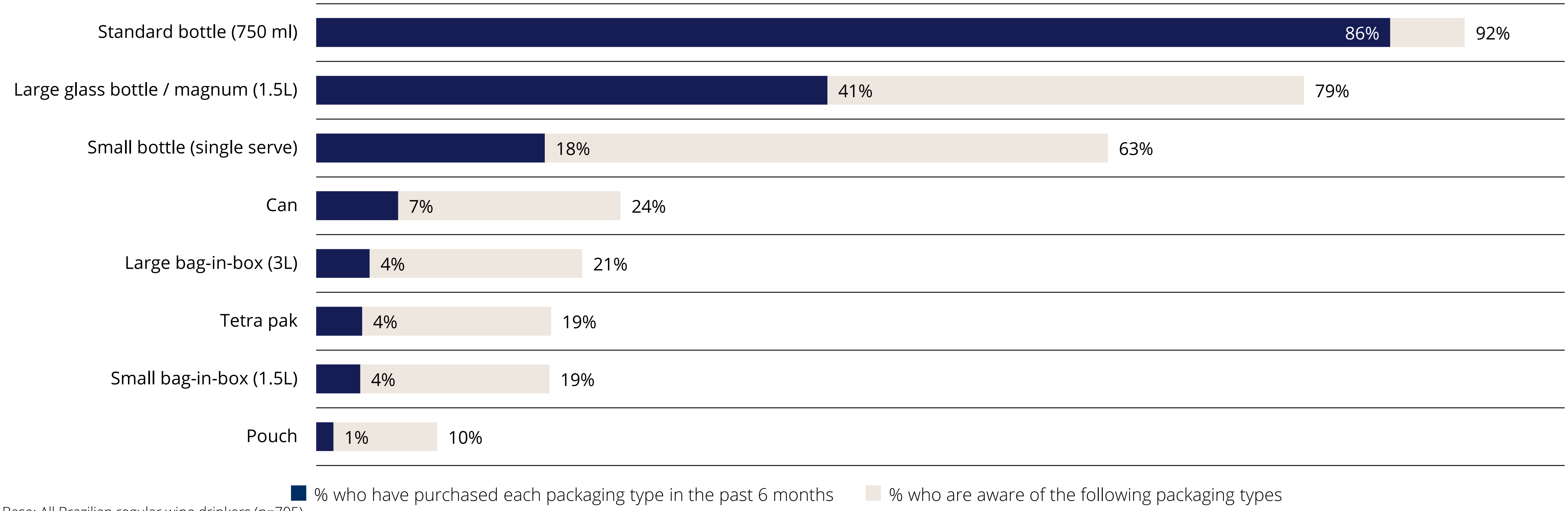
Base: All Brazilian regular wine drinkers (n≥705);
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Packaging type awareness and purchase

## Standard bottles have the highest awareness and purchase incidence among Brazilian regular wine drinkers. There is also high awareness and purchase of magnums and small bottles

**Packaging types: Awareness and purchase levels**

Percentage of those who are aware of or have purchased wine in the following packaging types




Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Packaging purchase

## The purchase incidences of different pack formats have remained stable; Boomers have a significantly lower purchase incidence of wine in magnums

### Packaging purchase: Tracking

Percentage who have purchased wine in the following packaging types

| Ranking '23 | | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '22 |
|---|---|---|---|---|
| 1 | Standard bottle (750 ml) | 84% | 86% | → |
| 2 | Large glass bottle / magnum (1.5L) | 41% | 41% | → |
| 3 | Small bottle (single serve) | 19% | 18% | → |
| 4 | Can | 7% | 7% | → |
| 5= | Large bag-in-box (3L) | 6% | 4% | → |
| 5= | Tetra pak | 4% | 4% | → |
| 5= | Small bag-in-box (1.5L) | 5% | 4% | → |
| 8 | Pouch | 2% | 1% | → |

### Packaging purchase: by generation

Percentage who have purchased wine in the following packaging types

| Ranking '23 | | All Brazilian Regular Wine Drinkers (n=705) | Gen Z LDA-26 (n=106) | Millennials 27-42 (n=291) | Gen X 43-58 (n=249) | Boomers 59+ (n=59) |
|---|---|---|---|---|---|---|
| 1 | Standard bottle (750 ml) | 86% | 81% | 88% | 85% | 92% |
| 2 | Large glass bottle / magnum (1.5L) | 41% | 49% | 46% | 36% | 23% |
| 3 | Small bottle (single serve) | 18% | 19% | 23% | 14% | 11% |
| 4 | Can | 7% | 10% | 8% | 3% | 9% |
| 5= | Large bag-in-box (3L) | 4% | 5% | 5% | 4% | 2% |
| 5= | Tetra pak | 4% | 4% | 5% | 2% | 6% |
| 5= | Small bag-in-box (1.5L) | 4% | 7% | 4% | 2% | 2% |
| 8 | Pouch | 1% | 3% | 1% | 2% | 0% |

Base: All Brazilian regular wine drinkers (n=705); = Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level;
Source: IWSR, Vinitrac® Brazil, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

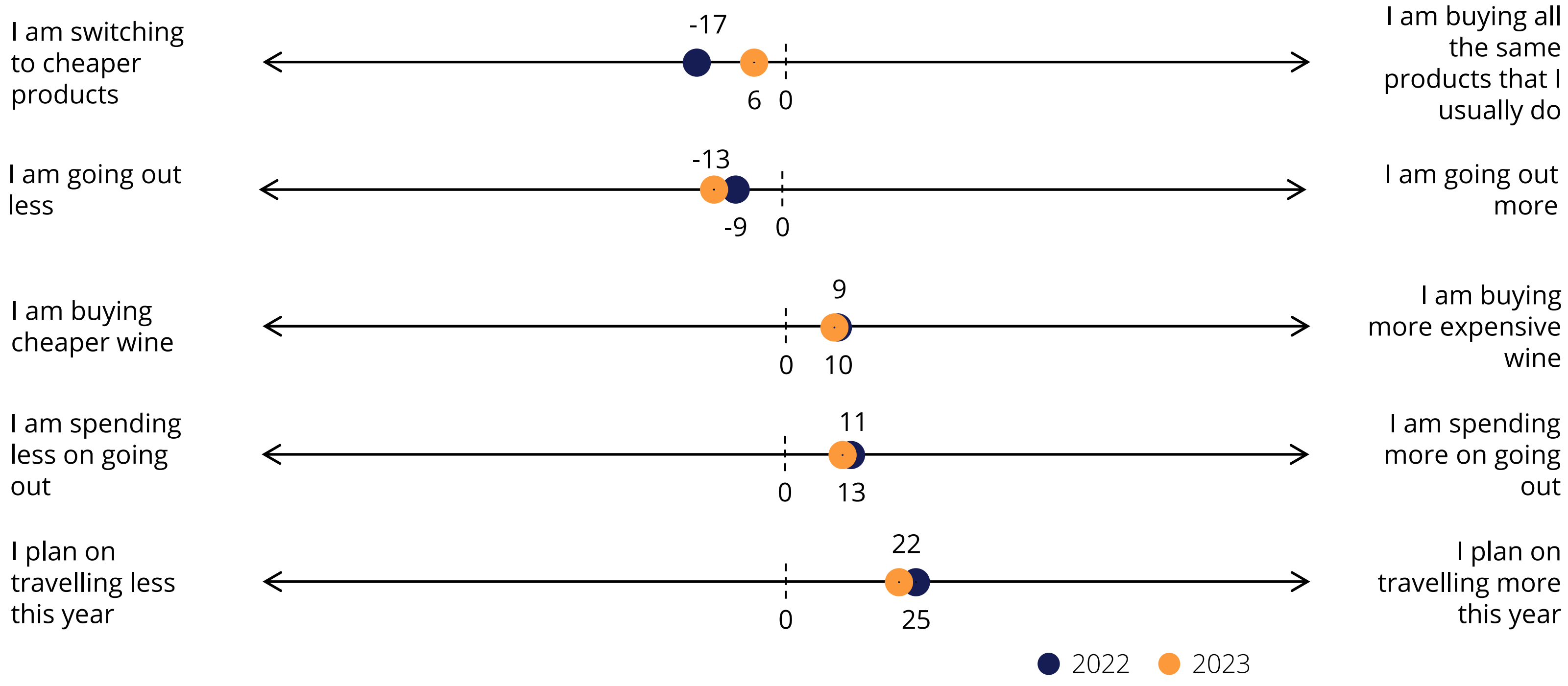
# Hot Topic: Consumer Sentiment

# Consumer sentiment

## Despite Brazilian regular wine drinkers switching to cheaper products, sentiment is generally positive, particularly about the outlook for more travel

**Consumer sentiment: spending and wine, tracked**

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement




### Market context

"Leading brands had to sacrifice margin to maintain sales, putting their reputations at risk."

*Executive Summary Report 2023, Brazil*

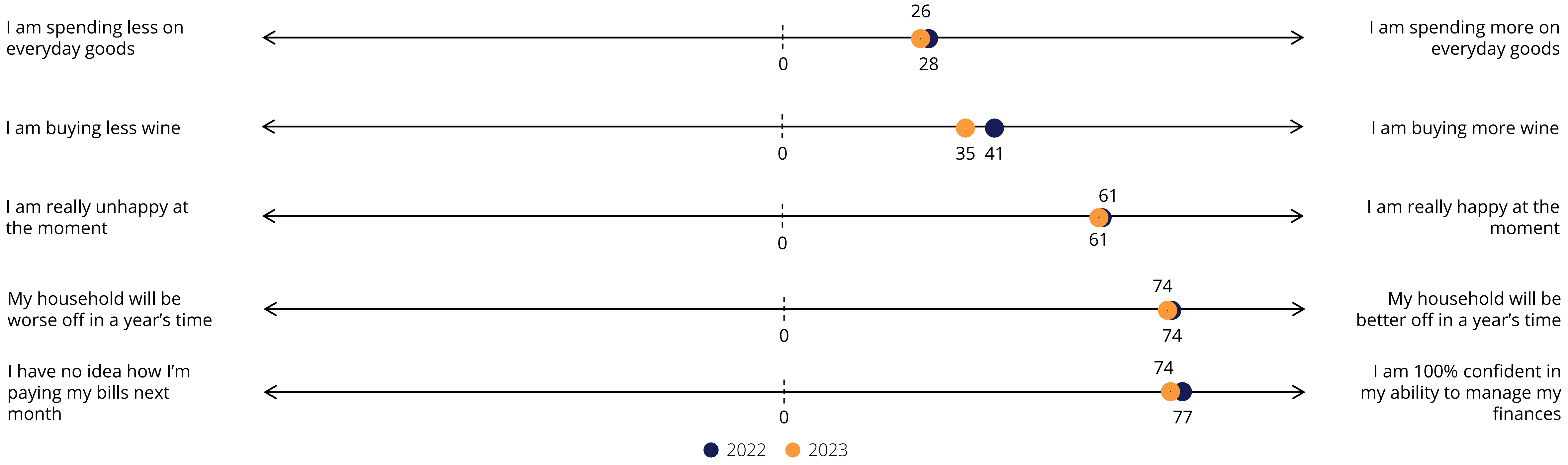
Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, July 2022 and October 2023 (n=705), Brazilian regular wine drinkers

# Consumer sentiment

## Consumer sentiment among regular wine drinkers remains net positive, with strong confidence in future household budgets and the ability to manage finances

### Consumer sentiment: general well-being, travel and socialising, tracked

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



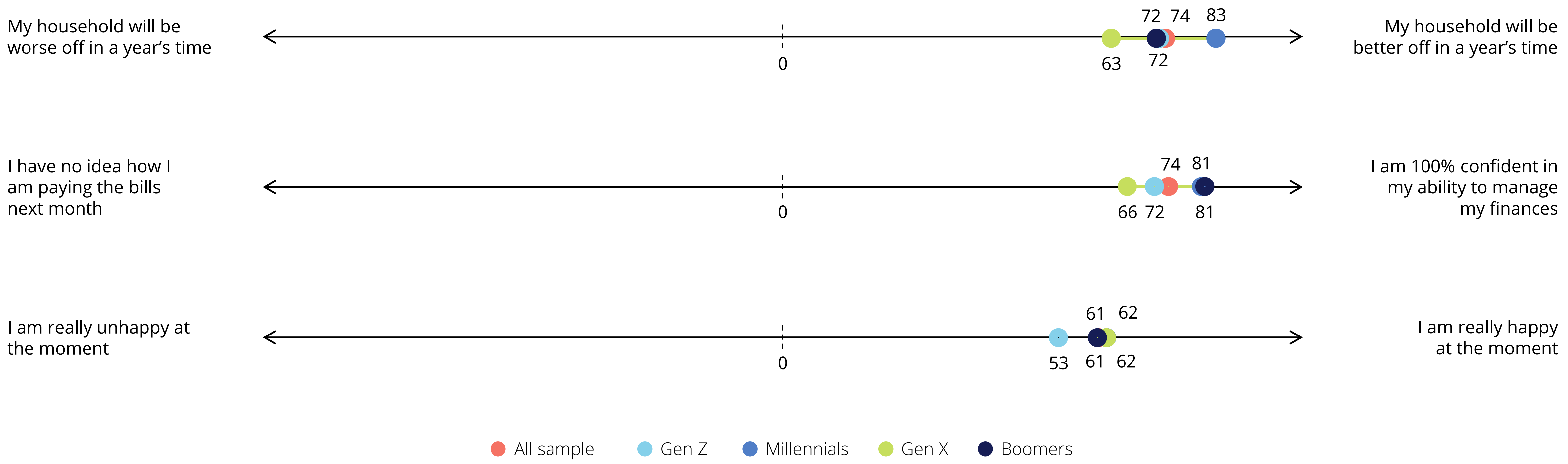

Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, July 2022 and October 2023 (n=705), Brazilian regular wine drinkers

# Consumer sentiment

## Brazil's regular wine drinkers have a very positive outlook across all age groups. Millennials have the most positive outlooks

**Consumer sentiment: general well-being**

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



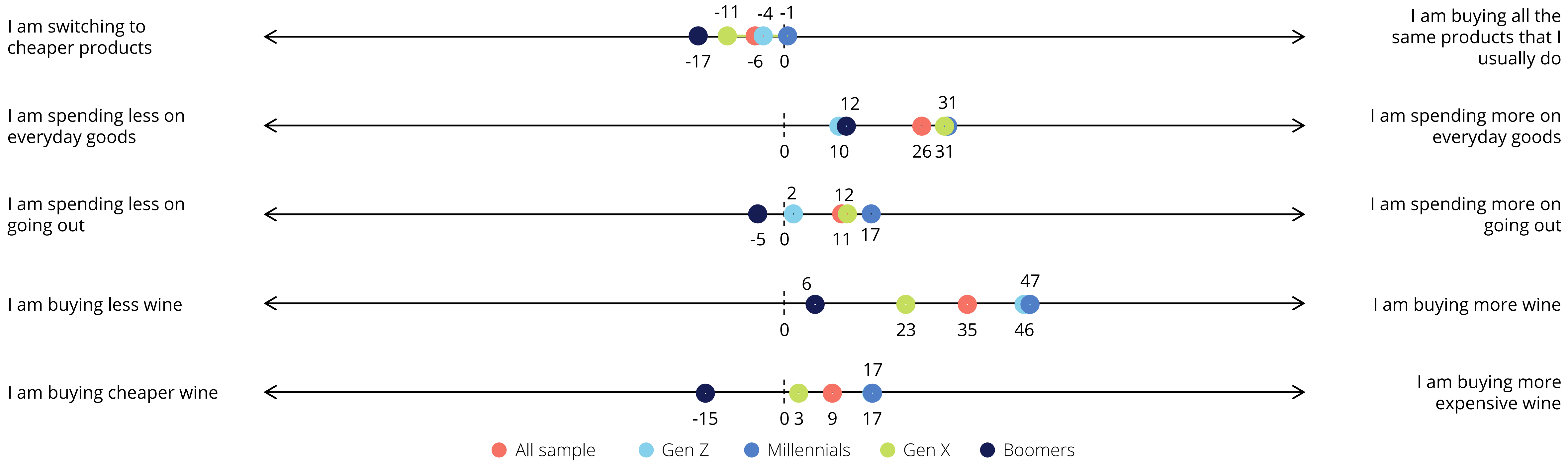

Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Consumer sentiment

## Regular wine drinkers are buying cheaper products generally, most notably Boomers and Gen X. Boomers are also spending less on going out and buying cheaper wine, but other groups are net positive on these measures

**Consumer sentiment: spending and wine**

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



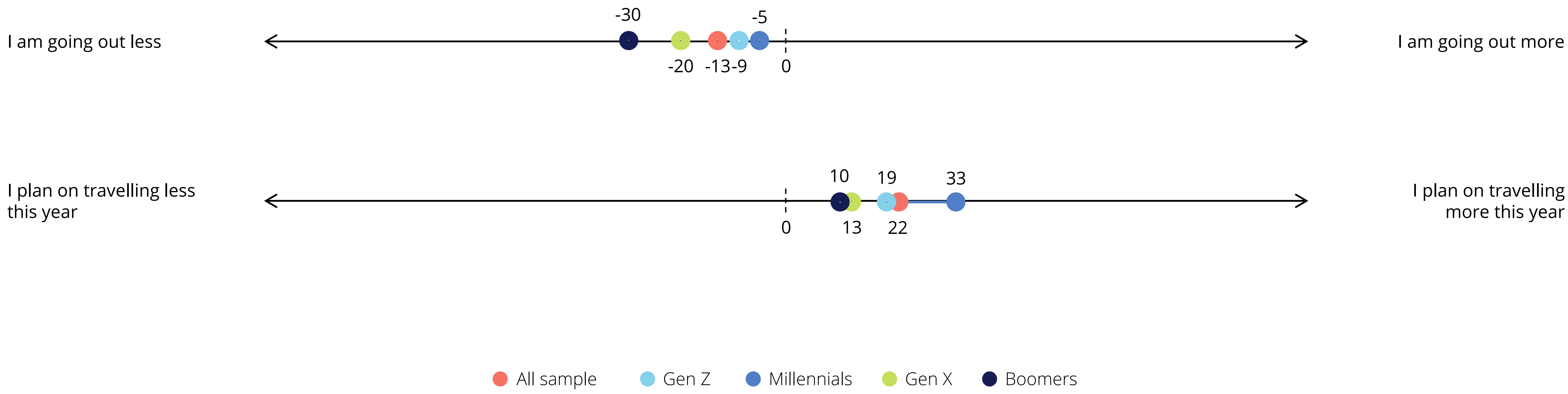

Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Consumer sentiment

## All age groups are going out less, led by older Gen X consumers and Boomers; this explains the decline in the proportion of Brazilian regular wine drinkers consuming wine in pubs and bars

**Consumer sentiment: travel and socialising**

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement

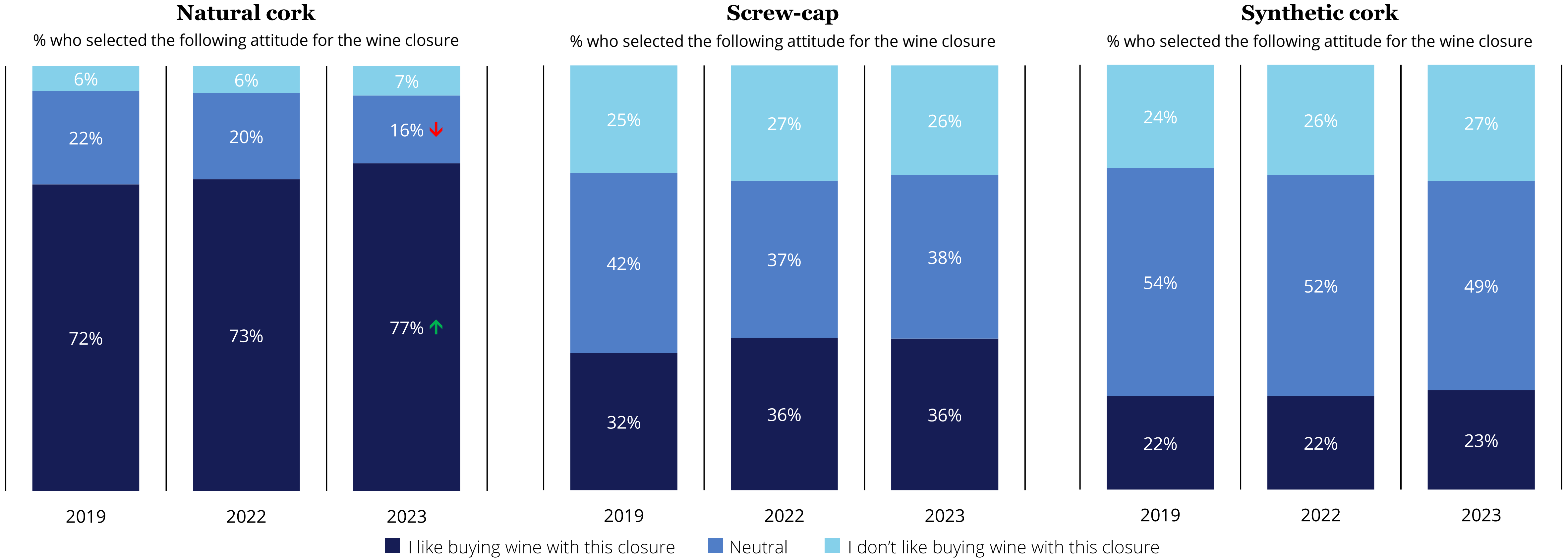



Base: All Brazilian regular wine drinkers (n=705)
Source: IWSR, Vinitrac® Brazil, October 2023 (n=705), Brazilian regular wine drinkers

# Hot Topic: Wine Closures

# Wine closures

## The share of Brazilian regular wine drinkers who like buying wine with a natural cork has increased to 77%, while preference levels for screw-caps and synthetic corks are stable




Base: All Brazilian regular wine drinkers (n≥705)

↑/↓: Statistically significantly higher/lower than the 2022 wave at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Views on wine closure types

## Regular wine drinkers associate natural cork with tradition, trustworthiness and high quality; screw-caps are associated with practicality, everyday drinking and affordability; synthetic corks are viewed as innovative

**Wine closure types imagery**

% who associate the following statements with each type of wine closure

| | Natural cork (n=705) | Screw-cap (n=705) | Synthetic cork (n=705) |
|---|---|---|---|
| Practical | 22% | 58% | 20% |
| Good for everyday drinking | 30% | 38% | 18% |
| Good for special occasions | 56% | 14% | 15% |
| Opening a wine with this type of closure gives me pleasure | 57% | 21% | 14% |
| High quality | 60% | 16% | 17% |
| Trustworthy | 63% | 25% | 19% |
| Low quality | 6% | 31% | 27% |
| Cheap | 20% | 39% | 25% |
| Affordable | 29% | 45% | 24% |
| Sustainable | 48% | 21% | 22% |
| Recyclable | 38% | 27% | 24% |
| Traditional | 70% | 14% | 9% |
| Modern | 24% | 33% | 35% |
| Innovative | 18% | 29% | 35% |
| Outdated | 18% | 21% | 18% |

Base: All Brazilian regular wine drinkers (n≥705); Green/turquoise: Statistically significantly higher than 2 / 1 wine closure types at a 95% confidence level

Source: IWSR, Vinitrac® October 2023 (n=705), Brazilian regular wine drinkers

# Brand Health

# Global Wine Brand Power Index

## Brand health measures included in the index

| Measure | Definition | Index |
|---|---|---|
| **Awareness** | % who have heard of each brand (when prompted with a list of brand names with logos)<br>Base = All wine drinkers | **Brand awareness index** |
| **Purchase** | % who have bought each brand in the past 3 months<br>Base = All wine drinkers | **Brand purchase index** |
| **Conversion** | % who have bought each brand in the past 3 months<br>Base = Those who have heard of each brand | |
| **Consideration** | % who would consider buying each brand<br>Base = Those who have heard of each brand | |
| **Affinity** | % who think each brand is right for people like them<br>Base = Those who have heard of each brand | **Brand connection index** |
| **Recommendation** | % who would recommend each brand to a friend<br>Base = Those who have heard of each brand | |

**Wine Brand Power Index**

# Brand Power

Domestic brands Chandon and Pérgola are the strongest brands in the Brazilian market. Chile’s Casillero del Diablo is in third place and is the only non-domestic brand to make the top five

CHANDON — 1st

PÉRGOLA VINHOS E SUCO DE UVA — 2nd

Casillero del Diablo — 3rd

# Brazil Wine Brand Power Index 2023

## Chandon has become Brazil's most powerful wine brand in 2023, with Pergola following close behind; the top 10 is dominated by domestic and Chilean brands

### Brazilian Brand Power Index

The top 30 most powerful wine brands in the Brazilian market based on consumer feedback from six key brand health measures

| Ranking '23 | | Final Index | Tracking vs 2022 | Score difference vs 2022 |
|---|---|---|---|---|
| 1 | Chandon | 92.4 | ↑+1 | -0.8 |
| 2 | Pérgola | 91.9 | ↓-1 | -2.2 |
| 3 | Casillero del Diablo | 83.8 | = | 1.1 |
| 4 | Quinta do Morgado | 78.1 | = | -2.5 |
| 5 | Garibaldi | 72.8 | ↑+3 | 4.7 |
| 6 | Santa Helena | 71.4 | ↑+4 | 3.8 |
| 7 | Aurora | 70.1 | ↓-1 | -0.6 |
| 8 | Santa Helena Reservado | 68.9 | ↑+6 | 4.2 |
| 9 | Santa Carolina Reservado | 68.8 | ↑+2 | 2.4 |
| 10 | Concha y Toro | 68.5 | = | 0.4 |
| 11 | Concha y Toro Reservado | 67.6 | ↓-4 | -0.5 |
| 12= | Galiotto | 65.9 | = | 0.5 |
| 12= | Casa Perini | 64.5 | ↑+4 | 2.1 |
| 14 | Gato Negro | 63.7 | ↑+2 | 1.3 |
| 15 | Sangue de Boi | 63.1 | = | -1.2 |

| Ranking '23 | | Final Index | Tracking vs 2022 | Score difference vs 2022 |
|---|---|---|---|---|
| 16 | Casal Garcia | 62.1 | ↑+4 | 4.8 |
| 17 | Casa Valduga | 61.0 | ↑+6 | 8.5 |
| 18 | Periquita | 59.9 | = | -2.3 |
| 19 | Miolo | 58.7 | ↓-6 | -6.1 |
| 20 | Salton | 57.7 | ↓-15 | -14.9 |
| 21 | Santa Carolina | 57.2 | = | 0.1 |
| 22 | Almaden | 55.1 | ↓-3 | -5.8 |
| 23 | Vinhos Del Grano | 54.4 | ↑+1 | 2.3 |
| 24 | Chalise | 54.1 | ↓-2 | 0.0 |
| 25 | Peterlongo | 49.6 | ↑+3 | 3.0 |
| 26 | San Pedro | 48.7 | ↑+7 | 4.6 |
| 27 | Santa Rita | 48.1 | ↑+4 | 2.0 |
| 28 | Dark Horse | 47.0 | ↑+15 | 6.3 |
| 29 | Mateus | 46.9 | ↑+28 | 10.2 |
| 30 | Travessia | 46.6 | ↑+15 | 6.1 |

Note: Brazil brand power comes from our annual score published in spring 2022
Source: IWSR, Vinitrac® Brazil, February 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Brand awareness

## Awareness levels among regular wine drinkers have had varying fortunes, with some brands significantly higher than in previous years and others lower. The influx of new wine drinkers tends to favour established brands

### Awareness: Tracking

Percentage who have heard of the following brands

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Chandon | n/a | 67% | 71% | n/a | → |
| 2 | Pérgola | 62% | 63% | 68% | ↑ | ↑ |
| 3 | Sangue de Boi | 68% | 61% | 66% | → | ↑ |
| 4 | Casillero del Diablo | 62% | 61% | 62% | → | → |
| 5= | Santa Helena | 58% | 55% | 58% | → | → |
| 5= | Garibaldi | n/a | 48% | 58% | n/a | ↑ |
| 7 | Aurora | 55% | 50% | 57% | → | ↑ |
| 8 | Santa Helena Reservado | n/a | 50% | 55% | n/a | → |
| 9 | Quinta do Morgado | n/a | 48% | 51% | n/a | → |
| 10 | Santa Carolina Reservado | 51% | 50% | 50% | → | → |
| 11= | Concha y Toro Reservado | 44% | 44% | 44% | → | → |
| 11= | Casa Perini | n/a | 41% | 44% | n/a | → |
| 13 | Santa Carolina | 45% | 42% | 43% | → | → |
| 14 | Periquita | 45% | 39% | 42% | → | → |
| 15 | Gato Negro | 41% | 40% | 41% | → | → |

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 16 | Vinhos Del Grano | 38% | 34% | 40% | → | ↑ |
| 17= | Salton | 55% | 36% | 39% | ↓ | → |
| 17= | Galiotto | 38% | 39% | 39% | → | → |
| 19 | Almaden | 45% | 37% | 38% | ↓ | → |
| 20 | Peterlongo | n/a | 36% | 37% | n/a | → |
| 21= | Casa Valduga | 32% | 38% | 36% | ↑ | → |
| 21= | Miolo | 41% | 36% | 36% | ↓ | → |
| 23 | Concha y Toro | 38% | 34% | 35% | → | → |
| 24= | Chalise | 39% | 35% | 34% | ↓ | → |
| 24= | San Pedro | 37% | 32% | 34% | → | → |
| 26 | Casal Garcia | 35% | 32% | 33% | → | → |
| 27 | Santa Rita | 38% | 33% | 32% | ↓ | → |
| 28 | Canção | 38% | 31% | 31% | ↓ | → |
| 29 | Castillo de Molina | 35% | 27% | 30% | ↓ | → |
| 30= | Travessia | 28% | 27% | 27% | → | → |

Note: Results for all brands available in the data table
Base: All Brazilian regular wine drinkers (n≥705); n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Brand purchase

## The evolution in regular wine drinkers' awareness of brands appears to have had an impact on some brands' purchase incidences, although this is far from universal

**Purchase: Tracking**

Percentage who have bought the following brands in the past three months

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '19 | vs. '22 |
| 1 | Pérgola | 31% | 33% | 33% | → | → |
| 2= | Casillero del Diablo | 24% | 23% | 24% | → | → |
| 2= | Quinta do Morgado | n/a | 21% | 24% | n/a | → |
| 4 | Chandon | n/a | 23% | 22% | n/a | → |
| 5= | Aurora | 18% | 17% | 18% | → | → |
| 5= | Santa Helena | 18% | 16% | 18% | → | → |
| 7= | Garibaldi | n/a | 13% | 17% | n/a | ↑ |
| 7= | Sangue de Boi | 21% | 16% | 17% | ↓ | → |
| 9= | Santa Carolina Reservado | 15% | 15% | 15% | → | → |
| 9= | Santa Helena Reservado | n/a | 12% | 15% | n/a | → |
| 9= | Galiotto | 13% | 14% | 15% | → | → |
| 12= | Concha y Toro | 13% | 10% | 13% | → | ↑ |
| 12= | Concha y Toro Reservado | 13% | 15% | 13% | → | → |
| 14= | Casa Perini | n/a | 12% | 12% | n/a | → |
| 14= | Chalise | 12% | 11% | 12% | → | → |

| Ranking '23 | | 2019 (n=1,000) | 2022 (n=1,011) | 2023 (n=705) | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '19 | vs. '22 |
| 14= | Gato Negro | 11% | 11% | 12% | → | → |
| 17= | Vinhos Del Grano | 10% | 8% | 11% | → | ↑ |
| 17= | Periquita | 14% | 12% | 11% | → | → |
| 17= | Casal Garcia | 9% | 10% | 11% | → | → |
| 17= | Santa Carolina | 11% | 11% | 11% | → | → |
| 21= | Salton | 20% | 8% | 9% | ↓ | → |
| 21= | Almaden | 11% | 12% | 9% | Ú | → |
| 21= | Miolo | 14% | 12% | 9% | ↓ | ↓ |
| 24= | Casa Valduga | 7% | 9% | 8% | → | → |
| 24= | San Pedro | 6% | 6% | 8% | → | → |
| 26= | Canção | 12% | 10% | 7% | ↓ | → |
| 26= | Peterlongo | n/a | 7% | 7% | n/a | → |
| 26= | Santa Rita | 8% | 7% | 7% | → | → |
| 29= | Mioranza | 9% | 5% | 6% | ↓ | → |
| 30= | Jota Pe | 6% | 6% | 6% | → | → |

Note: Results for all brands available in the data table
Base: All Brazilian regular wine drinkers (n≥705); n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Brand conversion

## Pergola and Quinta do Morgado are the leading brands for conversion of awareness into purchase among regular wine drinkers

### Conversion: Tracking

Percentage who have bought the following brands in the past three months

| Ranking '23 | | 2019 | 2022 | 2023 | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '19 | vs. '22 |
| 1 | Pérgola | 50% | 53% | 49% | → | → |
| 2 | Quinta do Morgado | n/a | 44% | 47% | n/a | → |
| 3 | Concha y Toro | 35% | 30% | 39% | → | ↑ |
| 4= | Casillero del Diablo | 39% | 38% | 38% | → | → |
| 4= | Galiotto | 33% | 36% | 38% | → | → |
| 6 | Chalise | 30% | 32% | 35% | → | → |
| 7= | Casal Garcia | 25% | 31% | 32% | ↑ | → |
| 7= | Chandon | n/a | 34% | 32% | n/a | → |
| 7= | Aurora | 33% | 35% | 32% | → | → |
| 10= | Santa Helena | 30% | 29% | 31% | → | → |
| 10= | Concha y Toro Reservado | 30% | 34% | 31% | → | → |
| 12 | Santa Carolina Reservado | 30% | 30% | 30% | → | → |
| 13= | Garibaldi | n/a | 26% | 29% | n/a | → |
| 13= | Vinhos Del Grano | 26% | 23% | 29% | → | → |
| 15= | Gato Negro | 27% | 27% | 28% | → | → |

| Ranking '23 | | 2019 | 2022 | 2023 | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '19 | vs. '22 |
| 15= | Casa Perini | n/a | 30% | 28% | n/a | → |
| 17= | Mateus | 24% | 25% | 27% | → | → |
| 17= | Santa Helena Reservado | n/a | 25% | 27% | n/a | → |
| 17= | Periquita | 30% | 31% | 27% | → | → |
| 20= | Mioranza | 32% | 23% | 26% | → | → |
| 20= | Jota Pe | 22% | 22% | 26% | → | → |
| 20= | Yellow Tail | 30% | 25% | 26% | → | → |
| 23= | Sangue de Boi | 31% | 26% | 25% | ↓ | → |
| 23= | Catena | 15% | 17% | 25% | ↑ | → |
| 23= | Bodegas Aguirre | 16% | 32% | 25% | → | → |
| 23= | Dark Horse | n/a | 17% | 25% | n/a | → |
| 27= | Góes | 30% | 36% | 24% | → | ↓ |
| 27= | Santa Carolina | 25% | 27% | 24% | → | → |
| 27= | Miolo | 35% | 33% | 24% | ↓ | ↓ |
| 27= | San Pedro | 16% | 19% | 24% | ↑ | → |

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking; Grey shading = low sample size (n<50)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Brand consideration

## Consideration of the top brands is high among Brazilian regular wine drinkers, which suggests that the branded wine market in Brazil is highly competitive

**Consideration: Tracking**

Percentage who would consider buying the following brands

| Ranking '23 | | 2019 | 2022 | 2023 | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Concha y Toro | 60% | 54% | 66% | → | ↑ |
| 2 | Yellow Tail | 70% | 48% | 64% | → | → |
| 3= | Chandon | n/a | 62% | 61% | n/a | → |
| 3= | Casa Valduga | 54% | 55% | 61% | → | → |
| 5= | Casa Perini | n/a | 53% | 59% | n/a | → |
| 5= | Casal Garcia | 53% | 56% | 59% | → | → |
| 7 | Casillero del Diablo | 61% | 57% | 58% | → | → |
| 8= | Luis Felipe Edwards | 49% | 53% | 57% | → | → |
| 8= | Trapiche | 48% | 52% | 57% | → | → |
| 8= | Pérgola | 61% | 58% | 57% | → | → |
| 8= | Garibaldi | n/a | 53% | 57% | n/a | → |
| 8= | Concha y Toro Reservado | 61% | 55% | 57% | → | → |
| 13 | Salton | 58% | 55% | 56% | → | → |
| 14= | Mateus | 50% | 49% | 55% | → | → |
| 14= | Gato Negro | 59% | 54% | 55% | → | → |

| Ranking '23 | | 2019 | 2022 | 2023 | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 14= | Dark Horse | n/a | 46% | 55% | n/a | → |
| 14= | Cono Sur | n/a | 44% | 55% | n/a | → |
| 14= | Galiotto | 56% | 46% | 55% | → | ↑ |
| 14= | Los Cardos | n/a | 44% | 55% | n/a | → |
| 14= | Tarapacá | 48% | 54% | 55% | → | → |
| 21 | Bodegas Aguirre | 53% | 54% | 54% | → | → |
| 22 | Quinta do Morgado | n/a | 52% | 53% | n/a | → |
| 23= | Errázuriz | 45% | 43% | 52% | → | → |
| 23= | Frontera | 52% | 44% | 52% | → | → |
| 23= | Santa Helena Reservado | n/a | 48% | 52% | n/a | → |
| 23= | Miolo | 59% | 55% | 52% | → | → |
| 23= | Santa Helena | 51% | 47% | 52% | → | → |
| 23= | Doña Paula | n/a | 43% | 52% | n/a | → |
| 23= | Periquita | 58% | 50% | 52% | → | → |
| 30= | Góes | 44% | 57% | 51% | → | → |

Note: Results for all brands available in the data table

Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking; Grey shading = low sample size (n<50)

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Brand affinity

## More than half of those who are aware of Chandon say they believe the brand is right for people like them

### Affinity: Tracking

Percentage who think the following brands are right for people like them

| Ranking '23 | | 2019 | 2022 | 2023 | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Chandon | n/a | 52% | 53% | n/a | → |
| 2 | Concha y Toro | 45% | 42% | 46% | → | → |
| 3 | Pérgola | 48% | 51% | 45% | → | → |
| 4 | Casillero del Diablo | 45% | 44% | 44% | → | → |
| 5 | Quinta do Morgado | n/a | 39% | 43% | n/a | → |
| 6 | Concha y Toro Reservado | 48% | 40% | 42% | → | → |
| 7= | Casal Garcia | 38% | 39% | 41% | → | → |
| 7= | Galiotto | 45% | 33% | 41% | → | ↑ |
| 9= | Miolo | 44% | 39% | 40% | → | → |
| 9= | Dark Horse | n/a | 30% | 40% | n/a | → |
| 11= | Gato Negro | 43% | 37% | 39% | → | → |
| 11= | Casa Valduga | 38% | 36% | 39% | → | → |
| 11= | Santa Carolina Reservado | 46% | 42% | 39% | ↓ | → |
| 11= | Marchigüe | 38% | 38% | 39% | → | → |
| 15= | Catena | 32% | 28% | 38% | → | ↑ |

| Ranking '23 | | 2019 | 2022 | 2023 | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 15= | Mateus | 34% | 33% | 38% | → | → |
| 17= | Ruffino | 23% | 31% | 37% | ↑ | → |
| 17= | Barefoot | 27% | 36% | 37% | → | → |
| 17= | Los Cardos | n/a | 32% | 37% | n/a | → |
| 17= | Frontera | 31% | 30% | 37% | → | → |
| 21= | Santa Helena Reservado | n/a | 33% | 36% | n/a | → |
| 21= | Garibaldi | n/a | 37% | 36% | n/a | → |
| 21= | Apothic | 36% | 41% | 36% | → | → |
| 21= | Casa Perini | n/a | 37% | 36% | n/a | → |
| 21= | Aurora | 33% | 35% | 36% | → | → |
| 26 | Assobio | 32% | 29% | 35% | → | → |
| 27= | Santa Helena | 32% | 31% | 34% | → | → |
| 27= | Yellow Tail | 51% | 38% | 34% | → | → |
| 27= | Trapiche | 32% | 30% | 34% | → | → |
| 27= | Periquita | 43% | 38% | 34% | ↓ | → |

Note: Results for all brands available in the data table

Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking; Grey shading = low sample size (n<50)

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level

Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Brand recommendation

## Quinta do Morgado, Casal Garcia and Galiotto are seeing increased levels of brand recommendation among Brazilian regular wine drinkers; other brands have more steady recommendation levels

**Recommendation: Tracking**

Percentage who would recommend the following brands to a friend

| Ranking '23 | | 2019 | 2022 | 2023 | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 1 | Chandon | n/a | 52% | 54% | n/a | → |
| 2 | Concha y Toro | 48% | 44% | 47% | → | → |
| 3= | Quinta do Morgado | n/a | 38% | 46% | n/a | ↑ |
| 3= | Casal Garcia | 37% | 40% | 46% | ↑ | → |
| 5= | Pérgola | 49% | 48% | 45% | → | → |
| 5= | Galiotto | 41% | 35% | 45% | → | ↑ |
| 5= | Casillero del Diablo | 48% | 43% | 45% | → | → |
| 5= | Dark Horse | n/a | 38% | 45% | n/a | → |
| 9 | Yellow Tail | 57% | 33% | 44% | → | → |
| 10 | Casa Valduga | 39% | 40% | 43% | → | → |
| 11= | Concha y Toro Reservado | 48% | 47% | 42% | → | → |
| 11= | Gato Negro | 43% | 39% | 42% | → | → |
| 13 | Santa Carolina Reservado | 47% | 41% | 41% | → | → |
| 14= | Casa Perini | n/a | 39% | 40% | n/a | → |
| 14= | Miolo | 44% | 41% | 40% | → | → |

| Ranking '23 | | 2019 | 2022 | 2023 | Tracking vs. '19 | Tracking vs. '22 |
|---|---|---|---|---|---|---|
| 14= | Trapiche | 34% | 41% | 40% | → | → |
| 14= | Los Cardos | n/a | 32% | 40% | n/a | → |
| 14= | Apothic | 35% | 41% | 40% | → | → |
| 19= | Ventisquero | 35% | 35% | 39% | → | → |
| 19= | Esporão | 32% | 36% | 39% | → | → |
| 19= | Garibaldi | n/a | 37% | 39% | n/a | → |
| 19= | Mateus | 36% | 38% | 39% | → | → |
| 23= | Periquita | 45% | 40% | 38% | → | → |
| 23= | Bodegas Aguirre | 25% | 37% | 38% | → | → |
| 25 | Barefoot | 32% | 35% | 37% | → | → |
| 26= | Doña Paula | n/a | 29% | 36% | n/a | → |
| 26= | Santa Helena | 35% | 33% | 36% | → | → |
| 26= | Tarapacá | 37% | 42% | 36% | → | → |
| 26= | Santa Helena Reservado | n/a | 32% | 36% | n/a | → |
| 26= | Assobio | 36% | 22% | 36% | → | → |

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking; Grey shading = low sample size (n<50)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# Research Methodology

# Research methodology

## Quantitative

Data was collected in Brazil since October 2017.

The October 2019 and November 2022 waves were tracked against October 2023.

Data was gathered via Wine Intelligence's IWSR, Vinitrac® online survey.

Respondents were screened to ensure that they were: at least 18 years old; drank red, white, rosé or blush wine at least once a month; and bought wine in the off-trade or 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, Brazilian regions and annual pre-tax household income.

The distribution of the sample is shown in the table.

| | | Oct-19 | Nov-22 | Oct-23 |
|---|---|---|---|---|
| | n= | 1,000 | 1,011 | 705 |
| **Gender*** | Male | 53% | 45% | 49% |
| | Female | 47% | 54% | 51% |
| | ***Total*** | ***100%*** | ***99%*** | ***100%*** |
| **Age** | LDA-24 | 12% | 14% | 12% |
| | 25-34 | 29% | 26% | 24% |
| | 35-44 | 26% | 23% | 24% |
| | 45-54 | 19% | 21% | 21% |
| | 55-64 | 14% | 17% | 18% |
| | ***Total*** | ***100%*** | ***100%*** | ***100%*** |
| **Region** | North | 7% | 9% | 7% |
| | Bahia | 6% | 7% | 7% |
| | North East (outside Bahia) | 20% | 17% | 23% |
| | Espírito Santo + Minas Gerais | 11% | 9% | 12% |
| | Rio de Janeiro | 10% | 8% | 8% |
| | São Paulo | 24% | 25% | 21% |
| | South | 15% | 17% | 14% |
| | Midwest | 8% | 7% | 7% |
| | ***Total*** | ***100%*** | ***100%*** | ***100%*** |

*Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas
Source: IWSR, Vinitrac® Brazil, October 2019, November 2022 and October 2023 (n≥705), Brazilian regular wine drinkers

# About
# **IWSR** Drinks Market Analysis

IWSR
drinks market analysis

IWSR is the leading source of data and intelligence on the beverage alcohol market. The IWSR database, essential to the industry, quantifies the global market of wine, spirits, beer, cider and RTDs (ready-to-drink) by volume and value in 160 countries, and provides insight into short- and long-term trends, including five-year volume and value forecasts, as well as consumer behaviour. IWSR tracks overall consumption and trends at brand, price segment and category level. Our data is used by the major international wine, spirits and beer companies, as well as financial and beverage-alcohol market suppliers.

IWSR's unique methodology allows us to get closer to what is actually consumed and better understand how markets work. IWSR boasts a team of global analysts, each of whom is equipped with local market expertise and an expansive network of on-the-ground industry contacts. Our analysts meet and speak with their industry contacts throughout the year to capture local insight, key market trends, and the 'why' behind the numbers.

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