

Portugal

Country Profile

December 2009

1. AREA UNDER VINES

In 2006 area under vines amounted to 249 000 hectares, 10 000 hectares less than the level recorded in 1996. It is estimated that the planted area will reach 250 000 hectares in 2008.

Year	Area under vines
	Hectares
1995	261 000
1996	259 000
1997	260 000
1998	260 000
1999	261 000
2000	246 000
2001	248 000
2002	251 000
2003	249 000
2004	247 000
2005	248 000
2006	249 000
2007*	248 000
2008**	250 000

**Estimate*
Source: OIV

2. PRODUCTION

Since Portugal joined the European Union in 1986, renewed attempts have been made to regenerate and modernize the wine industry. Problems appear to have stemmed from poor vinification. Portugal is famous specifically for Madeira and Port, the two classic fortified wines. The quality of wine produced has been improving as a result of consumers increasingly demanding high quality wines, providing producers with the incentive to focus on producing wines classified as “VQPRD” and Regional wine, the so-called “quality wines”. It is estimated that wine production will by 7.9% to reach 559,6 million litres in 2008.

Wine Production (Litres)				
Year	VQPRD*	Vin Regional	Vin de Table	Total
1996	418 300 000	135 500 000	417 400 000	971 200 000
1997	228 000 000	100 500 000	283 900 000	612 400 000
1998	191 000 000	56 400 000	127 600 000	375 000 000
1999	373 800 000	149 500 000	261 100 000	784 400 000
2000	326 000 000	134 200 000	210 800 000	671 000 000
2001	414 800 000	150 000 000	214 200 000	779 000 000
2002	293 400 000	138 800 000	235 500 000	667 700 000
2003	317 900 000	166 100 000	250 000 000	734 000 000
2004	328 700 000	157 200 000	262 200 000	748 100 000
2005	338 800 000	141 600 000	246 200 000	726 600 000
2006	332 144 400	173 721 300	248 404 900	754 270 600
2007	282 643 800	153 119 800	171 657 600	607 421 200
2008**	286 466 300	129 084 100	144 008 300	559 558 700

*Includes VLQPRD, VEQPRD and VFQPRD

**Estimate

Source: Instituto da Vinha e do Vinho

3. CONSUMPTION

3.1 Total wine consumption

Wine is mostly a traditional drink in Portugal, and is therefore suffering from maturity. Portuguese consumers are being tempted away to other types of alcoholic drinks, such as spirits and FABs. It is estimated that wine consumption in Portugal amounted to 461,1 million litres (-1.9%) in 2007.

Year	Wine consumption (Litres)
1995	569 500 000
1996	580 000 000
1997	522 300 000
1998	505 500 000
1999	505 400 000
2000	459 500 000
2001	469 700 000
2002	465 000 000
2003	531 500 000
2004	491 300 000
2005	490 000 000
2006	470 000 000
2007*	461 100 000

* Estimate

Source: Instituto da Vinha e do Vinho and OIV

3.2 Per capita consumption

Although Portugal's per capita consumption still ranks amongst the highest in Europe, wine consumption has been declining gradually and is expected to continue to falling over the coming years. Per capita wine consumption reached 46.9 litres in 2006, a decrease of more than 1% compared to 2005.

Year	Wine	Beer	Spirits	Total alcohol
	Litres		LAA	
1996	54.5	65.2	1.5	10.6
1997	52.5	64.7	1.5	10.3
1998	50.7	65.3	1.5	10.2
1999	50.6	64.3	1.5	10.1
2000	45.9	62.3	1.5	9.5
2001	46.8	61.3	1.4	9.5
2002	46.3	58.6	1.4	9.3
2003	52.6	58.7	1.4	10.1
2004	47.7	58.1	1.4	9.4
2005	47.4	57.6	1.3	9.3
2006	46.9	57.0	1.3	9.2

Source: *The Global Wine Statistical Compendium 1961-2006*

Please Note: Due to the Copyright and Licence Agreement between SAWIS and Euromonitor, access to the following Euromonitor statistics will only be available by emailing Lizelle Arendse, Information Officer at SAWIS (lizelle@sawis.co.za). Only South African Wine Industry role-players will gain access to these statistics. These statistics will be available in electronic - and hard copy.

4. CONSUMER EXPENDITURE ON ALCOHOLIC DRINKS

5. SALES OF ALCOHOLIC DRINKS BY SECTOR

5.1 Total volume

5.2 Total value

5.3 Forecast sales of alcoholic drinks by sector - total volume

5.4 Forecast sales of alcoholic drinks by sector - total value

6. SALES OF WINE BY SUBSECTOR

6.1 Total volume

6.2 Total value

6.3 Forecast sales of wine by subsector - total volume

6.4 Forecast sales of wine by subsector - total value

7. SALES OF WINE BY PRICE SEGMENT

7.1 Red wine

7.2 White wine

7.3 Rosé wine

8. SALES OF WINE BY QUALITY CLASSIFICATION

8.1 Red wine

8.2 White wine

8.3 Rosé wine

9. DISTRIBUTION

9.1 On-trade vs Off-trade sales of wine - total volume

9.2 On-trade vs Off-trade sales of wine - total value

9.3 Off-trade sales of wine by distribution format: % analysis

10. INTERNATIONAL TRADE

10.1 Exports per country

Countries	2000	2001	2002	2003	2004	2005	2006	2007	2008
	Hectolitres								
ANGOLA	90,928	103,566	175,973	336,301	439,185	462,894	591,158	553,734	516,478
BELGIUM	26,096	24,210	24,806	27,657	24,080	32,129	29,742	30,157	28,444
BRAZIL	45,433	41,683	25,615	31,396	35,855	45,737	55,598	59,046	55,776
CANADA	28,312	28,040	27,864	29,695	33,518	38,083	40,888	46,924	53,313
CAPE VERDE	19,836	24,905	29,797	29,965	39,746	43,018	51,092	56,525	40,494
FRANCE	201,625	172,617	439,959	782,259	592,426	380,195	319,726	306,034	247,757
GERMANY	98,695	79,103	73,427	77,189	161,150	112,731	121,714	118,105	116,082
LUXEMBOURG	17,588	16,417	18,001	18,235	18,940	21,551	21,603	23,137	20,599
MOZAMBIQUE	39,972	14,152	13,144	26,806	57,398	65,731	69,809	76,759	75,199
NORWAY	15,078	13,863	16,114	20,757	23,938	21,783	31,864	31,278	28,626
SPAIN	237,475	39,005	103,935	141,197	70,926	90,425	178,296	352,134	295,276
UK	88,556	94,269	85,929	85,502	88,904	102,289	97,426	104,912	103,070
USA	54,300	54,771	57,895	51,390	59,293	65,164	64,079	76,729	75,536
OTHER	258,859	262,023	378,210	727,662	793,690	339,284	471,656	789,120	477,159
Total	1,222,755	968,624	1,470,668	2,386,011	2,439,050	1,821,013	2,144,651	2,624,594	2,133,809

Source: Instituto da Vinha e do Vinho

Countries	2000	2001	2002	2003	2004	2005	2006	2007	2008
	1,000 €								
ANGOLA	8,316	12,582	15,860	25,209	29,416	33,390	40,916	47,946	56,554
BELGIUM	5,404	5,462	5,407	5,852	5,472	7,744	6,706	6,400	6,733
BRAZIL	12,052	11,641	7,137	7,764	7,941	10,090	12,979	14,196	14,019
CANADA	7,715	7,629	7,020	7,389	8,415	9,912	11,835	13,615	15,393
CAPE VERDE	1,574	1,841	1,974	2,094	2,598	2,630	3,162	3,787	3,423
FRANCE	45,718	47,042	54,226	32,692	28,511	20,486	20,249	22,002	22,982
GERMANY	15,560	15,183	13,073	11,625	15,155	12,129	13,823	13,853	16,366
LUXEMBOURG	3,512	3,454	3,690	3,635	3,741	4,007	4,137	4,373	4,906
MOZAMBIQUE	3,343	1,042	816	1,244	2,589	3,195	3,590	4,025	4,015
NORWAY	3,435	3,337	4,013	4,536	5,006	4,185	6,077	6,010	5,455
SPAIN	15,674	6,566	8,831	10,323	8,230	7,099	10,806	15,265	14,640
UK	18,564	20,369	18,947	16,820	17,692	21,370	19,080	22,233	19,891
USA	15,772	16,690	17,616	13,340	14,067	15,614	16,681	19,070	18,007
OTHER	46,796	46,563	45,845	52,236	60,426	47,392	55,086	68,347	64,830
Total	203,435	199,401	204,456	194,761	209,260	199,246	225,127	261,123	267,213

Source: Instituto da Vinha e do Vinho

10.2 Imports

Portugal is normally a net wine exporter, except in unusually low production years. Following a much reduced 1998 crop, Portugal was a net importer of wines during 1999, 2000 and 2001, in terms of volume. In 2007, imports increased by 36.4% in volume and by 24.9% in value.

Year	Imports	
	Volume (Litres)	Value (10 ³ EUR)
1996	62 198 800	39 806
1997	45 440 300	31 437
1998	160 986 800	84 972
1999	240 787 700	138 459
2000	212 075 300	123 439
2001	183 011 000	93 246
2002	148 891 700	81 324
2003	147 493 300	78 805
2004	167 925 500	80 370
2005	152 227 800	73 400
2006	103 452 600	60 008
2007	141 124 300	74 964

Source: *Instituto da Vinha e do Vinho*