

Spirits in Portugal

June 2023

Table of Contents

Spirits in Portugal - Category analysis

KEY DATA FINDINGS

2022 DEVELOPMENTS

Spirits benefits from return to socialisation and faster tourist flows

Bitters among the best performers in 2022

Non alcoholic versions still see limited success

PROSPECTS AND OPPORTUNITIES

Rising costs and a focus on premiumisation to foster higher growth potential in value than volume terms

Tourist demand remains a key sales factor

Greater offer of "lighter" products in order to increase drinking occasions

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 1 - Benchmark Brands 2022

CATEGORY DATA

Table 1 - Sales of Spirits by Category: Total Volume 2017-2022

Table 2 - Sales of Spirits by Category: Total Value 2017-2022

Table 3 - Sales of Spirits by Category: % Total Volume Growth 2017-2022

Table 4 - Sales of Spirits by Category: % Total Value Growth 2017-2022

Table 5 - Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022

Table 6 - Sales of Spirits by Off-trade vs On-trade: Value 2017-2022

Table 7 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 8 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022

Table 9 - Sales of Dark Rum by Price Platform: % Total Volume 2017-2022

Table 10 - Sales of White Rum by Price Platform: % Total Volume 2017-2022

Table 11 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022

Table 12 - Sales of English Gin by Price Platform: % Total Volume 2017-2022

Table 13 - Sales of Vodka by Price Platform: % Total Volume 2017-2022

Table 14 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022

Table 15 - GBO Company Shares of Spirits: % Total Volume 2018-2022

Table 16 - NBO Company Shares of Spirits: % Total Volume 2018-2022

Table 17 - LBN Brand Shares of Spirits: % Total Volume 2019-2022

Table 18 - Forecast Sales of Spirits by Category: Total Volume 2022-2027

Table 19 - Forecast Sales of Spirits by Category: Total Value 2022-2027

Table 20 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027

Table 21 - Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

Alcoholic Drinks in Portugal - Industry Overview

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving
Advertising
Smoking ban
Opening hours
On-trade establishments
Summary 2 - Number of On-trade Establishments by Type 2017-2022

TAXATION AND DUTY LEVIES

Summary 3 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade
Duty free
Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 22 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

Table 23 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
Table 24 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022
Table 25 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
Table 26 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
Table 27 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
Table 28 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022
Table 29 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
Table 30 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
Table 31 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022
Table 32 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
Table 33 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
Table 34 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027
Table 35 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
Table 36 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027
Table 37 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 4 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus

of operations, their competitors, their geographic presence and performance.

- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/spirits-in-portugal/report.