



PRESS KIT

VINI PORTUGAL
2020



VINI PORTUGAL

ViniPortugal is the Interprofessional Association of the Portuguese Wine Industry, recognised by the Ministry of Agriculture on October 1st, 2015

Its MISSION is “to promote the image of Portugal, as a wine producer par excellence, valuing the brand “Vinhos de Portugal/Wines of Portugal”, contributing to a sustained growth in the volume and average price of Portuguese wines”.

7 associations and 1 professional confederation are Founding Associates of ViniPortugal:

Trade Representatives: ACIBEV, ANCEVE and AND;

Production Representatives: CAP, FENADEGAS, FENAVI and FEVIPOR

Representatives of the demarcated regions: ANDOVI.

Activity: International promotion of the image of Wines of Portugal.

Governing Bodies: General Assembly Board, Supervisory Board and Management

Board: Frederico Falcão, President, Jorge Basto Gonçalves, Vice-President representing Production and João Gomes da Silva, Vice-President representing the Trade.

Foundation: 15 October 1996

Head Office

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VINI (PORTUGAL) IN NUMBERS

25 Years promoting Portuguese wines

21 Priority international markets

7.15 Million euros invested in promotion in 2021

+100 Marketing actions implemented every year

1.5 Million euros invested in the USA and 850 thousand euros in Brazil markets

856 Million Euros exports of Portuguese wines in 2020

6.4 Million hl of wine production in 2020

11.5% of the Food Products exports in 2020

47% is the percentage of wine production exported in volume

9th is Portugal's position on the international wine trade list in 2020

With more than 250 identified autochthonous varieties, the Wines of Portugal brand focuses its communication on the following 10, which are a flagship in the promotion of national wines:

Reds: Touriga Nacional, Aragonez / Tinta Roriz, Touriga Franca, Trincadeira / Tinta Amarela, Castelão, Baga;

White: Alvarinho, Arinto, Fernão Pires/Maria Gomes and Encruzado.



THE BOARD

ViniPortugal's Board, elected in May 2020, for the 2020/2023 triennium, is composed of three members: Frederico Falcão, João Gomes da Silva and Jorge Basto Gonçalves.

CHAIRMAN

Frederico Falcão has a degree in Agricultural Engineering and a postgraduate degree in Oenology. He started his professional activity in Esporão, later as the Director of the Vitiviculture and Oliviculture Department of Companhia das Lezírias, and also as a Consultant Winemaker in other projects. He was also member of the Board of Directors of the Comissão Vitivinícola Regional do Tejo (Viticulture Commission of the Tejo Region) and President of the Executive Board of the Instituto da Vinha e do Vinho (Vine and Wine Institute), from 2012 to 2018. More recently, he was the Administrator / CEO of the Bacalhôa Group and Vice President of the Portuguese Winemaking Association. Frederico Falcão is the president of ViniPortugal since May 27, 2020.

VICE - PRESIDENTS

Jorge Basto Gonçalves – Production Representation

Lawyer. Director of Adega Cooperativa de Amarante, since 1984. Jorge Basto Gonçalves was the president of Vercoope – União das Adegas Cooperativas da Região dos Vinhos Verdes (Union of Cooperative Wineries of the Vinho Verde Region) between 1991 and 2012, member of the Executive Committee and member of the General Council of the Viticulture Commission of the Vinho Verde Region. Chairman of the Board of Directors of Fenadegas – Federação Nacional das Adegas Cooperativas (National Federation of Cooperative Wineries) and Vice Chairman of the Board of Directors of Confagri – Confederação Nacional das Cooperativas e do Crédito Agrícola de Portugal (National Confederation of Cooperatives and Agricultural Credit of Portugal).

João Gomes da Silva – Trade Representation.

João Gomes da Silva has a degree in Economics and a PhD in Agricultural Economics from the University of Reading (United Kingdom). He made an international career in Europe and Latin America in the Food Distribution and Textile sectors. Since 2014, João Gomes da Silva is the Sogrape Director, leading the Global Marketing and Sales functions for the group's Portuguese wine portfolio, which is present in the Douro, Vinho Verde, Dão, Lisboa and Alentejo regions, including compelling names, such as Mateus, Sandeman, Casa Ferreirinha and Porto Ferreira, among others.



MANAGEMENT TOOLS

VINI PORTUGAL is ruled by the following management tools:

- i) The **Institutional Strategic Plan**, which covers a period of 3 years, with the Plan for the 2017/2020 triennium in force.
- ii) The **Marketing and Promotion Plan for the Wines of Portugal Brand**, which covers the same 3-year period.
- iii) The **Annual Operational Plan** comprising the Activity Plan, Marketing Plan and Budget.



VINI PORTUGAL BRANDS

ViniPortugal is responsible for the management and communication of the “*Vinhos de Portugal / Wines of Portugal*” brand, which is the central element in its performance in strategic international markets.

Vinhos de Portugal / Wines of Portugal

The “*Wines of Portugal*” brand, owned by the Instituto da Vinha e do Vinho, IP, is a collective brand created in 2010 to promote the image of Portuguese wines in the various international markets.

Portuguese wine has managed to assert itself internationally by providing a unique and distinctive experience, based on the diversity of its grape varieties and *terroirs*, which is associated with a high consistency of quality.



PRIORITY MARKETS

There are 21 priority markets for the Wines of Portugal brand, operated by VINI PORTUGAL: United States, Brazil, Canada, China, United Kingdom, Germany, Japan, South Korea, Switzerland, Angola, Sweden, Denmark, Poland, Mexico, Belgium, Russia, Ukraine, Norway, France, Spain and Portugal.

The investment of 7.15 million for the promotion of Portuguese wines in 2021 is concentrated in these 21 markets.

USA

Market with high opportunity and growth potential for national exports. It is the target of the largest investment in the international promotion of Portuguese wine, as it is an important export market for Portuguese wines, where a 26% growth is expected in the period 2020-2023. It is interesting to note the positive way in which Portuguese wines have been received by specialized critics, as well as the recent development of exports.

It is currently positioned as the 2nd main destination for Portuguese wine exports, having grown 3.1% in value in 2020.

Target for 2020/2023: to grow in value by 26%.

USA CATEGORY	Value (M€)			Volume (hl)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	85 355	92 798	8,72%	27 723	28 772	3,78%	3,25	3,1	-4,54%
IGP WINE	75 947	98 088	29,15%	18 843	23 634	25,43%	2,48	2,41	-2,89%
WINE	27 359	29 372	7,36%	5 548	6 686	20,50%	2,03	2,28	12,24%
PORT WINE	34 079	34 236	0,46%	33 399	30 753	-7,92%	9,8	8,98	-8,35%
MADEIRA	2 148	1 464	-31,85%	2 896	1 603	-44,64%	13,48	10,95	-18,76%
SPARKLING WINE	1 567	1 320	-15,76%	801	703	-12,16%	5,11	5,33	4,27%
TOTAL	227 037	257 458	13,40%	89 480	92 244	3,09%	3,94	3,58	-9,09%

- ✓ USA is the 2nd destination market for DOC+IGP+WINE, representing 11% of Portugal total exports in value.
- ✓ USA is also the 2nd destination market for Portuguese DOC+IGP wines.



Brazil

It remains one of the main markets for Portuguese wines, despite some economic and social instability that will have some impact on the performance of this market. Nevertheless, exports in 2020 grew significantly (+23.5% in value), having improved their position in the tables of the largest destinations for Portuguese wine.

Portuguese wines in 2020 asserted themselves in volume as the 2nd origin of wines in the Brazilian market, after Chile, approaching Argentina in 2nd place in value.

Target for 2020/2023: to grow in value by 30%.

BRASIL	Volume (hl)			Value(M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	71 511	82 077	14,78%	24 151	29 697	22,96%	3,38	3,62	7,13%
IGP WINE	78 708	102 748	30,54%	19 053	24 389	28,00%	2,42	2,37	-1,94%
WINE	39 964	58 790	47,11%	6 383	9 363	46,67%	1,60	1,59	-0,30%
PORT WINE	7 302	7 121	-2,47%	3 370	3 119	-7,45%	4,62	4,38	-5,10%
MADEIRA	302	219	-27,52%	150	101	-32,66%	4,95	4,60	-7,09%
SPARKLING WINE	1 223	833	-31,88%	1 113	831	-25,34%	9,10	9,98	9,60%
TOTAL	199 881	252 810	26,48%	54 994	67 903	23,47%	2,75	2,69	-2,38%

- ✓ In 2020 exports to Brazil represent 8% of the total exported in value.
- ✓ Brazil become in 2020 the 1st destination market for DOC+IGP+WINE, being the first destination for DOP and for IGP wines.

Angola

Portuguese wines still lead the sales of bottled wine in this market. With the drop in the Angolan market, it fell to the 11th destination for Portuguese wines in value, after having been the first destination for many years.

However, this is one of the markets with a lower average price, showing a substantial drop in the last 5 years, being below 1.20 euros.

Target for 2020/2023: reversing the downward trend and achieving growth in value.

ANGOLA	Volume (hl)			Value(M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	15 884	8 396	-47,14%	6 593	3 516	-46,66%	4,15	4,19	0,91%
IGP WINE	23 070	10 792	-53,22%	5 913	3 184	-46,16%	2,56	2,95	15,10%
WINE	227 099	196 843	-13,32%	22 756	18 016	-20,83%	1,00	0,92	-8,66%
PORT WINE	675	230	-65,95%	380	134	-64,82%	5,63	5,82	3,32%
MADEIRA	21	15	-28,05%	14	8	-39,82%	6,61	5,53	-16,36%
SPARKLING WINE	1 165	1 954	67,69%	947	1 066	12,59%	8,13	5,46	-32,86%
TOTAL	268 335	219 043	-18,37%	36 836	26 141	-29,03%	1,37	1,19	-13,06%

- ✓ Portugal still ranks 1st, in value, in wine imports to Angola.



Canada

It is a market that imports the majority of the wines consumed, with the Provinces of Québec, Ontario and British Columbia (BC) being the largest consumers, representing together more than 75% of wine consumption. In 2019, Portuguese wines conquered a market share of 2.81%, placing Portugal in 9th place in terms of both volume and value.

Canada's wine imports are controlled by provincial organizations, monopolies, with different rules and in which Portugal also maintains very different positions from province to province. Québec is the market with the greatest European influence and where Portugal has the greatest penetration and market share (4.24%). British Columbia sees Portugal as a supplier of premium wines and hence the average selling price of Portuguese wines and the market share (1.33 %), which reflect this position. On the contrary, the Ontario market sees Portugal as a supplier of price with the sale of Portuguese wines reaching the lowest average price for a market share of 2.58%.

In 2020, Canada was the 5th destination in value for Portuguese wines, being also the 5th destination for wines if we analyse it without the influence of the Port category.

Target for 2020/2023: to grow 12% in value

CANADÁ	Volume (hl)			Value(M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	61 213	68 722	12,27%	22 073	23 860	8,09%	3,61	3,47	-3,72%
IGP WINE	37 024	36 516	-1,37%	10 678	10 440	-2,23%	2,88	2,86	-0,87%
WINE	15 776	15 369	-2,58%	2 939	3 101	5,49%	1,86	2,02	8,28%
PORT WINE	11 849	12 484	5,36%	10 547	11 077	5,02%	8,90	8,87	-0,32%
MADEIRA	451	402	-10,89%	364	325	-10,81%	8,08	8,09	0,09%
SPARKLING WINE	478	521	8,88%	214	208	-3,00%	4,47	3,98	-10,91%
TOTAL	129 186	136 936	6,00%	47 485	49 809	4,89%	3,68	3,64	-1,04%

- ✓ Canada is the 5rd destination market for DOC+IGP+WINE, representing 5.89% of Portugal total exports in value.



China

China is one of the markets for the diversification of the promotional activity of Wines of Portugal representing, in 2020, around 13 million euros in value of national exports.

It is considered one of the markets with the greatest growth potential, although its business model is still poorly understood and there is little information about consumers.

In 2020, China dropped to the 16th destination of total Portuguese wine exports, having also dropped to the 13th destination of wines, if analysing without the category of Port wine.

Target for 2020/2023: to grow 59% in value.

CHINA	Volume (hl)			Value(M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	14 271	9 171	-35,73%	6 753	4 420	-34,55%	4,73	4,82	1,84%
IGP WINE	22 571	13 196	-41,54%	6 456	3 937	-39,03%	2,86	2,98	4,29%
WINE	23 342	15 562	-33,33%	3 791	2 556	-32,58%	1,62	1,64	1,13%
PORT WINE	3 309	1 881	-43,15%	2 303	1 264	-45,12%	6,96	6,72	-3,46%
MADEIRA	503	564	12,09%	432	713	65,19%	8,58	12,65	47,37%
SPARKLING WINE	203	95	-53,33%	85	50	-41,64%	4,18	5,22	25,05%
TOTAL	64 336	40 642	-36,83%	19 934	13 033	-34,62%	3,10	3,21	3,50%

- ✓ Portugal occupies the 8th position, in volume and value, in wine imports to China.
- ✓ The market share in 2019 was 1.0%.



Japan

Japan is one of the markets with high economic development, with great interest in foreign wines and an intense wine culture, being one of the main destinations for Madeira Wine. Given its historical affinities with Portugal, this country is today considered one of the priority markets for our wines. Having started promotional actions in this market in 2014, ViniPortugal intends to increase the visibility of the Wines of Portugal brand in this market.

In 2020, Japan dropped to the 21st destination for Portuguese wines, in value, and 20th if we analyse exports without the influence of Port Wine.

Target for 2020/2023: to grow 19% in value.

JAPÃO	Volume (hl)			Value(M€)			Average Price (€/ Lt)		
CATEGORY	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	5 098	5 763	13,04%	1 537	1 925	25,24%	3,02	3,34	10,79%
IGP WINE	7 072	6 221	-12,04%	2 045	1 625	-20,57%	2,89	2,61	-9,69%
WINE	2 546	1 975	-22,43%	661	550	-16,83%	2,60	2,78	7,22%
PORT WINE	1 750	901	-48,52%	1 114	604	-45,82%	6,37	6,70	5,24%
MADEIRA	2 295	1 442	-37,20%	1 276	895	-29,91%	5,56	6,21	11,61%
SPARKLING WINE	433	499	15,22%	169	188	11,42%	3,90	3,77	-3,29%
TOTAL	19 541	17 273	-11,61%	7 022	6 092	-13,24%	3,59	3,53	-1,84%

- ✓ In 2020, Portugal ranks 10th in volume and 11th in value in terms of wine imports into Japan.
- ✓ The market share in 2020 was very low - 0.5%.
- ✓ In 2020, compared to 2019, there was a decrease in imports from the main supplier countries.



Germany

- ✓ Germany is the 6th destination in value for Portuguese wine exports, representing around 47.6 M€;
- ✓ In 2020, Portugal was the 11th largest wine supplier in Germany in volume and 9th in value, with a market share of 1.91% in value;

ALEMANHA CATEGORY	Volume (hl)			Value(M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	80 934	87 454	8,05%	20 151	21 545	6,92%	2,49	2,46	-1,05%
IGP WINE	12 998	14 401	10,79%	3 635	4 094	12,62%	2,80	2,84	1,65%
WINE	99 114	50 386	-49,16%	8 025	5 769	-28,11%	0,81	1,14	41,41%
PORT WINE	26 148	27 773	6,22%	13 174	12 716	-3,47%	5,04	4,58	-9,12%
MADEIRA	3 188	2 868	-10,03%	1 370	1 304	-4,81%	4,30	4,55	5,80%
SPARKLING WINE	718	856	19,14%	276	322	16,80%	3,84	3,76	-1,97%
TOTAL	229 930	190 399	-17,19%	48 332	47 583	-1,55%	2,10	2,50	18,89%

South Korea

- ✓ In 2019, Portugal was South Korea's 11th wine supplier, both in volume and value.
- ✓ The market share in 2019 was 0.72%.
- ✓ The growth of wine imports from Portugal in 2019 was 56.2% in value, a growth much higher than that of other countries in the world.

COREIA DO SUL CATEGORY	Volume (hl)			Value(M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	316	792	151,08%	171	307	79,78%	5,41	3,87	-28,40%
IGP WINE	1 156	5 419	368,59%	353	1 638	363,79%	3,05	3,02	-1,02%
WINE	-	-	-	-	-	-	-	-	-
PORT WINE	1 020	2 274	122,93%	1 020	2 047	100,57%	10,00	9,00	-10,03%
MADEIRA	133	102	-23,75%	114	92	-19,04%	8,57	9,10	6,18%
SPARKLING WINE	20	14	-30,48%	11	10	-4,68%	5,56	7,56	35,92%
TOTAL	2 879	8 943	210,67%	1 742	4 234	143,00%	6,05	4,73	-21,78%



Russia

- ✓ In 2019, Portugal was Russia's 8th largest wine supplier in volume and 6th in value.
- ✓ The market share in 2019 was 2.51%.
- ✓ A 27.1% growth in imports compared to 2018 while the rest of the world grew 10.4%

RÚSSIA	Volume (hl)			Value(M€)			Average Price (€/ Lt)		
CATEGORY	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	8 390	7 764	-7,46%	2 060	1 672	-18,83%	2,46	2,15	-12,29%
IGP WINE	9 629	7 695	-20,08%	1 808	1 319	-27,05%	1,88	1,71	-8,72%
WINE	8 440	18 057	113,94%	781	3 320	325,14%	0,93	1,84	98,72%
PORT WINE	1 929	2 146	11,23%	1 289	1 351	4,86%	6,68	6,30	-5,73%
MADEIRA	356	178	-50,03%	213	123	-42,13%	6,00	6,95	15,82%
SPARKLING WINE	56	1 228	2078,16%	24	355	1386,91%	4,24	2,89	-31,74%
TOTAL	28 853	37 239	29,06%	6 204	8 166	31,61%	2,15	2,19	1,98%

Ukraine

- ✓ In 2018, Portugal was Germany's 11th largest wine supplier in volume and value.
- ✓ The market share in 2018 was 1.22%.
- ✓ In 2018, Portugal was the third country to register a higher growth in imports compared to 2017 (+64.1%).

UKRAINE	Volume (hl)			Value (M€)			Average Price (€/ Lt)		
CATEGORY	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	2 594	4 800	85,02%	587	1 050	78,94%	2,26	2,19	-3,29%
IGP WINE	1 548	2 625	69,62%	338	620	83,53%	2,18	2,36	8,20%
WINE	1 364	1 475	8,16%	250	300	20,23%	1,83	2,03	11,16%
PORT WINE	935	1 505	61,07%	488	757	55,06%	5,22	5,03	-3,73%
MADEIRA	305	181	-40,74%	189	108	-42,97%	6,18	5,95	-3,77%
SPARKLING WINE	37	7	-78,61%	12	3	-75,26%	3,38	3,91	15,64%
TOTAL	6 784	10 609	56,37%	1 866	2 840	52,21%	2,75	2,68	-2,66%



Switzerland

- ✓ In 2020, Portugal was the 4th largest wine supplier in Switzerland in terms of volume and value.
- ✓ The market share in 2020 was 3.51%.
- ✓ In value, Portugal was the third country to register a higher growth in imports compared to 2019 (+9.98%).

SWITZERLAND	Volume (hl)			Value (M€)			Average Price (€/ Lt)		
CATEGORY	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	33 425	37 233	11,39%	13 158	14 254	8,33%	3,94	3,83	-2,75%
IGP WINE	31 477	28 123	-10,65%	9 458	8 526	-9,85%	3,00	3,03	0,90%
WINE	24 615	34 147	38,73%	3 357	5 584	66,33%	1,36	1,64	19,90%
PORT WINE	6 935	6 656	-4,01%	4 475	4 252	-4,98%	6,45	6,39	-1,01%
MADEIRA	755	900	19,24%	439	357	-18,63%	5,82	3,97	-31,76%
SPARKLING WINE	392	501	27,92%	293	284	-2,96%	7,47	5,67	-24,13%
TOTAL	101 723	112 130	10,23%	32 235	34 310	6,44%	3,17	3,06	-3,44%

Mexico

- ✓ In 2019, Portugal was Mexico's 7th wine supplier in value.
- ✓ The market share in 2019 was 0.66%.
- ✓ Imports of wine from Portugal to Mexico, in value, grew 14.7% compared to 2018.

MEXICO	Volume (hl)			Value (M€)			Average Price (€/ Lt)		
CATEGORY	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	1 110	1 336	20,38%	403	479	18,86%	3,63	3,58	-1,27%
IGP WINE	722	-	-	241	-	-	3,34	-	-
WINE	-	-	-	-	-	-	-	-	-
PORT WINE	946	692	-26,86%	632	463	-26,77%	6,68	6,69	0,13%
MADEIRA	31	21	-30,56%	23	13	-42,65%	7,59	6,27	-17,42%
SPARKLING WINE	21	7	-69,07%	17	4	-78,22%	7,97	5,61	-29,58%
TOTAL	3 348	2 735	-18,30%	1 436	1 153	-19,71%	4,29	4,21	-1,72%



United Kingdom

- ✓ In 2020, Portugal was the 10th largest wine exporter in volume and 11th in value to the United Kingdom.
- ✓ The market share in 2020 was 2.09%.
- ✓ Compared to 2019, wine imports to the United Kingdom from Portugal grew by 7.9% in 2020.

UNITED KINGDOM	Volume (hl)			Value (M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	36 527	49 657	35,95%	10 534	13 985	32,76%	2,88	2,82	-2,35%
IGP WINE	34 223	46 729	36,54%	8 362	11 141	33,23%	2,44	2,38	-2,43%
WINE	61 198	84 484	38,05%	11 601	15 819	36,36%	1,90	1,87	-1,23%
PORT WINE	79 417	89 763	13,03%	44 252	46 836	5,84%	5,57	5,22	-6,36%
MADEIRA	3 201	2 506	-21,72%	2 245	1 826	-18,70%	7,01	7,29	3,87%
SPARKLING WINE	479	985	105,54%	174	393	125,79%	3,63	3,99	9,85%
TOTAL	217 046	275 434	26,90%	77 748	90 340	16,20%	3,58	3,28	-8,44%

Norway

- ✓ In 2019, Portugal was Norway's 8th largest wine supplier, both in volume and value.
- ✓ The market share in 2019 was 3.00%.

NORWAY	Volume (hl)			Value (M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	23 507	32 664	38,95%	4 876	6 767	38,78%	2,07	2,07	-0,13%
IGP WINE	7 072	6 221	-12,04%	2 045	1 625	-20,57%	2,89	2,61	-9,69%
WINE	4 093	7 338	79,29%	892	1 544	73,00%	2,18	2,10	-3,51%
PORT WINE	1 709	2 502	46,43%	1 712	2 337	36,48%	10,02	9,34	-6,79%
MADEIRA	139	199	43,22%	142	153	7,51%	10,24	7,69	-24,93%
SPARKLING WINE	74	250	239,26%	49	174	253,03%	6,69	6,96	4,06%
TOTAL	37 075	53 665	44,75%	10 618	14 873	40,07%	2,86	2,77	-3,23%



Sweden

- ✓ In 2019, Portugal was Sweden's 8th wine supplier, both in volume and in value.
- ✓ Portugal had in 2019 a market share, in value, of 2.91%.
- ✓ In terms of value, imports from Portugal grew by 20.2%, having been the country with the highest growth compared to 2018.

SWEDEN	Volume (hl)			Value (M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	15 476	17 780	14,88%	4 236	4 916	16,06%	2,74	2,77	1,02%
IGP WINE	28 067	42 931	52,96%	6 967	10 336	48,36%	2,48	2,41	-3,01%
WINE	41 196	60 031	45,72%	7 368	10 933	48,39%	1,79	1,82	1,83%
PORT WINE	2 780	2 824	1,57%	1 662	1 655	-0,42%	5,98	5,86	-1,96%
MADEIRA	964	907	-5,95%	500	506	1,29%	5,18	5,58	7,70%
SPARKLING WINE	546	364	-33,33%	208	146	-30,07%	3,82	4,01	4,88%
TOTAL	89 039	124 845	40,21%	20 948	28 494	36,02%	2,35	2,28	-2,99%

Poland

- ✓ In 2019, Portugal was the 7th largest supplier of wine in Poland in volume and 6th in value.
- ✓ Portugal in 2019 held a 6.75% market share in Poland.

POLAND	Volume (hl)			Value (M€)			Average Price (€/ Lt)		
	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	22 785	31 121	36,58%	5 867	7 100	21,02%	2,57	2,28	-11,40%
IGP WINE	43 938	50 118	14,07%	9 996	11 658	16,62%	2,28	2,33	2,24%
WINE	28 199	26 198	-7,10%	3 865	3 877	0,31%	1,37	1,48	7,97%
PORT WINE	6 496	5 977	-7,98%	2 424	2 232	-7,93%	3,73	3,73	0,06%
MADEIRA	232	195	-16,20%	163	129	-20,61%	7,02	6,65	-5,26%
SPARKLING WINE	299	214	-28,53%	81	101	24,90%	2,70	4,72	74,76%
TOTAL	102 078	113 918	11,60%	22 449	25 136	11,97%	2,20	2,21	0,33%



Denmark

- ✓ Portugal in 2020 was the 11th largest wine supplier in Denmark in volume, and the 10th in value.
- ✓ In 2020, Portugal's value market share in Denmark was 3.21%.

DENMARK	Volume (hl)			Value (M€)			Average Price (€/ Lt)		
CATEGORY	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	4 148	4 594	10,75%	1 762	1 889	7,21%	4,25	4,11	-3,20%
IGP WINE	3 144	3 440	9,41%	905	1 067	17,88%	2,88	3,10	7,74%
WINE	10 111	8 296	-17,96%	2 644	2 407	-8,96%	2,62	2,90	10,96%
PORT WINE	18 940	19 538	3,16%	16 574	14 637	-11,69%	8,75	7,49	-14,39%
MADEIRA	466	390	-16,28%	347	214	-38,37%	7,44	5,48	-26,39%
SPARKLING WINE	259	463	-30,48%	158	242	-4,68%	6,09	5,24	-13,96%
TOTAL	37 124	36 787	-0,91%	22 453	20 514	-8,64%	6,05	5,58	-7,80%

Belgium

- ✓ In 2019, Portugal was the 7th largest wine exporter in volume and 5th in value to Belgium.
- ✓ Portugal, in 2019, had a market share of 4.14%.

BELGIUM	Volume (hl)			Value (M€)			Average Price (€/ Lt)		
CATEGORY	2019	2020	Var. 19/20	2019	2020	Var. 19/20	2019	2020	Var. 19/20
DOC WINE	15 587	13 351	-14,34%	5 196	4 605	-11,37%	3,33	3,45	3,47%
IGP WINE	12 597	14 762	17,19%	3 603	4 005	11,16%	2,86	2,71	-5,15%
WINE	27 940	31 594	13,08%	5 387	6 062	12,53%	1,93	1,92	-0,48%
PORT WINE	77 278	77 275	0,00%	30 672	30 877	0,67%	3,97	4,00	0,67%
MADEIRA	2 016	1 668	-17,24%	1 114	807	-27,53%	5,53	4,84	-12,44%
SPARKLING WINE	266	934	251,11%	92	342	270,52%	3,46	3,65	5,53%
TOTAL	135 975	140 001	2,96%	46 141	46 805	1,44%	3,39	3,34	-1,48%



Portugal

Intervention in the national market is essentially carried out in two ways, that of Professional Training and the Education of Tourists who visit us. As for the first, ViniPortugal developed a vast training program under the umbrella of the Wines of Portugal Academy, aimed at training both restaurant professionals and large distribution sales advisers in wine. At the Initiation level, the concept of “Wine by the Glass” and its advantages are particularly addressed, very much in line with the principles of the Wine in Moderation movement. In 2020, the partnership with APHORT was continued and a new partnership with AHRESP was initiated, with some of the training being done in an online format.

As for the second route, it focuses essentially on the two Tasting Rooms in Lisboa and Porto, where the visitor, essentially foreign, can experience Portuguese wines through tasting on his own or by participating in thematic tastings where a wine specialist will present the wines, grape varieties and wine regions.



Transversal Events

ViniPortugal is also responsible for organizing two annual events of a transversal nature to the sector, although pursuing different objectives:

Wines of Portugal Challenge

In 2019, ViniPortugal, in partnership with CNEMA, completed its 7th edition. This competition aims to constitute an event of high international relevance, exclusively dedicated to increasing the visibility of Portuguese wines in the main export markets.

In the 2019 edition, more than 1,382 wines from all national wine regions competed, which unequivocally demonstrates the quality and diversity of national production. The jury panel involved 170 participants, of which 141 were Portuguese and 29 were foreigners. After 3 days of tastings in Santarém, 140 wines were selected for consideration by the Grand Jury, 29 of which were elected "Great Gold Medal".

In parallel to the technical sessions of the competition, there were Master Classes, Wine Dinners and Visits to Wine Regions exclusively for the foreign judges and elaborated in an educational logic.

In order to provide rigor and high selectivity, the Competition Regulations limit the number of medals to be awarded to 25% of the Wines entered, and "Great Gold" Medals cannot exceed 2.5% of that total, with a 7.5% limit for "Gold" medals. In 2020, due to restrictions imposed by the COVID-19 pandemic, this event did not take place.





Wines of Portugal Annual Forum

This event takes place annually in the last week of November and is intended as a meeting point for economic agents and their institutions to debate current events and reflect on future prospects for the sector. It presents the sectorial Plans for the International Promotion of the Wines of Portugal brand, articulated between ViniPortugal and the Certifying Entities.

In 2020, given the circumstances experienced due to the COVID-19 pandemic, the Forum was completely digital, broadcast from the Tasting Room in Lisboa to a universe of almost 1,000 participants.



WINES OF PORTUGAL TASTING ROOMS

ViniPortugal has two Tasting Rooms, open to the public at Terreiro do Paço – Lisboa and at Palácio da Bolsa – Porto, in buildings classified as national monuments.

The Wines of Portugal Tasting Rooms are spaces where visitors are invited to take a journey from north to south of the country through a tasting of wines from various regions.

For the most demanding consumers or for groups, the rooms have a Menu of Thematic Tastings available and, in the case of groups, prior reservation is required.

Thousands of tourists visit these spaces annually, where they are introduced to the diversity of Portuguese wine and taught about the different wine regions and to taste and identify the different aromas and flavours of the different grape varieties.

The Tasting Rooms present a vast annual program of small events, aimed at wine lovers who want to deepen their knowledge through the tasting. These events, with an established calendar, traditionally take place in the late afternoons of Fridays or Saturdays, with registration being made through email.

Visitors can also purchase wines from various national producers on site, and the staff of the Tasting Rooms is able to provide interested parties with all information regarding the wines.



WORLDWIDE AWARDED PORTUGUESE WINES

Portuguese wines have been recognized by international critics and, throughout 2020, were distinguished in prestigious international competitions.

The various competitions valued the permanent efforts of Portuguese producers, who have sought to affirm the differentiated character of Portuguese wine, always guaranteeing high quality standards and seeking to adapt the wines to the market tastes.

The quality of wines and national producers was also highlighted in several international competitions and by international critics.

Portuguese wines are certainly at their best in terms of quality, rivalling the best wines in the world. There are many wine rankings that support this statement. Here are some examples:

Portuguese wines were distinguished in the **China Wine & Spirits Awards (CWSA) 2020** competition with a total of 120 medals and 3 Trophies for the wines: Reserva do Monte 2018 by Casa Santos Lima as “Lisboa Wine of the Year”, Adega de Pegões Alicante Bouschet 2017 as “Península de Setúbal Wine of the Year” and Grand'Arte Special Selection 2014 by DFJ as “Portuguese Wine of the Year”. The competition also awarded “Double Gold” medals, the highest distinction in the competition, to 12 Portuguese wines.

Also in the **China Wine & Spirits Awards (CWSA)** competition but in the “Best Value 2020” category, Portuguese wines received 70 medals. The wine Portada Reserva 2018 from DFJ Vinhos was considered the “Portuguese Wine of the Year” for 2020 in this category. The competition awarded “Double Gold” medals, the highest distinction in the competition, to 3 Portuguese wines, namely: Moscatel Adega de Favaios 1999, Monsaraz Reserva CARMIM 2017 and Portada Reserva 2018. Portugal also won 45 gold medals, 10 bronze medals and 11 silver medals.

The spring edition of the competition **Mundus Vini 2020**, the most important wine competition in Germany, awarded 275 Portuguese wines. The 26th edition of this competition awarded 5 Grand Gold medals, the highest distinction in the competition, to the Portuguese wines: Quinta do Pego Harvest Porto 2011, Foral de Cantanhede Baga Grande Reserva 2011, Marquês de Marialva Grande Reserva 2013, Colinas de Ançã Baga Reserva 2015 and Carm Reserva red 2017. The region of Porto and Douro was the most awarded region with 48 medals. Portugal also collected 140 gold medals and 130 silver medals.



The **Sakura Japan Women's Wine Awards 2020** competition awarded 76 medals to Portuguese wines. The Periquita Reserva red 2016 wine from producer José Maria da Fonseca was awarded the “Diamond Trophy”, the highest distinction in the competition. Wines from Portugal were also distinguished with 8 double gold medals: Atlântico Reserva red 2017 - Casa Relvas, Merino Reserva red 2017 - Casa Relvas, Rebelde red 2018 - Casa Santos Lima, Marquês Marialva Selected Harvest white 2018 - Adega Cooperativa de Cantanhede, Quinta da Devesa White Port 20 Years, Tarambola red 2018 - Casa Santos Lima, Casa do Lago red 2018 - DFJ Wines, Periquita Reserva 2016 red - José Maria da Fonseca. And 43 gold medals, 25 silver medals and 13 special prizes were also awarded to Portuguese wines.

One of the most important wine competitions in France, **Vinalies Internationales 2020**, awarded 22 gold medals and 35 silver medals to Portuguese wines. The 26th edition of the competition, which took place in 2020, brought together 2959 wine samples from all wine regions in the world. Among the awarded regions are Lisboa, Tejo, Minho, Península de Setúbal, Alentejo and Douro e Porto. The wine Quinta de São Sebastião Reserva 2015 won the Red Wines Trophy, the highest distinction in the competition.

In 2020 Portugal had two wine brands in the **Top 50 of “The World's Most Admired Wine Brands 2020”**. The wine company Symington achieved 7th place, while Esporão took 13th place in the ranking of the 50 most admired wine brands in the world by Drinks International magazine.

The wine Moscatel Roxo Setúbal DOC Venâncio Costa Lima Reserva da Família 2016 was distinguished as the best Muscat in the 20th edition of the French competition “**Muscats du Monde**”, having obtained the maximum classification among 158 Muscats from 16 countries. In the **TOP 10 Best Muscats du Monde 2020**, Portugal is also represented by another 3 Portuguese Muscats: Moscatel de Setúbal DOC - Venâncio Costa Lima Family Reserva 5 years, Moscatel de Setúbal DOC – Adega de Palmela 10 years, Moscatel Roxo de Setúbal DO Superior 2012 – Casa Ermelinda Freitas. In total, Portuguese Muscats obtained 8 gold medals and 8 silver medals.

Portuguese wines won 38 medals in the last edition of the French competition **Citadelles du Vin**. The 20th edition of the competition awarded 31 gold medals and 7 silver medals to Portuguese wines. The Algarve Al-Ria 2019 Regional Wine from Casa Santos Lima was distinguished with the “special prize” of the competition.

In 2020 there were two Portuguese producers in the **Top 50 of “World's Best Vineyards”**. Quinta do Crasto won 8th place and Quinta do Noval was 49th. These annual awards distinguish the “best vineyards in the world”.



Portugal won 94 medals at the **Challenge International du Vin 2020**, occupying the third place in the list of most awarded countries. There were 52 gold medals, 31 silver and 11 bronze in an international competition that took place in France between 24 and 25 April.

Portugal stands out positively with 306 wines awarded in the prestigious **Concours Mondial de Bruxelles 2020** among 8500 wines from 46 producing countries. In total, Portugal collected 6 Great Gold medals, 102 gold medals and 198 silver medals. Alentejo was the most awarded Portuguese region with 65 medals, followed by the Porto e Douro region with 61 medals. The wines with Great Gold Medals were: Quinta de Lemos Touriga Nacional 2010, Picos do Couto Reserva 2016, Foral de Cantanhede Grande Reserva 2011, Marquês de Marialva Grande Reserva 2013, Rabo de Gala 2018, Rocksand Shiraz 2018. The wine Quinta de Lemos Touriga Nacional 2010 was also distinguished as “Revelations of International Wine in 2020” of this competition.

The “**Top 100 Wineries of the World 2020**” by **Wine & Spirits**, one of the most important American wine magazines, placed 4 Portuguese wine producing companies from various wine regions in Portugal in the top 100 of the best wine companies in the world: Ramos Pinto, Blandy's Madeira, Broadbent and José Maria da Fonseca were the Portuguese producers awarded by the magazine Wine & Spirits.

In the **Decanter World Wine Awards 2020** competition, one of the largest wine competitions held in Asia, Portugal won a total of 610 medals. The competition awarded 5 Portuguese wines with the "Best in Show" medal, the best distinction in the competition, and the wines awarded in this category were scored with 97 points: Justino's Terrantez 50 Year Old NV Madeira, Monsaraz Reserva 2017, Alentejo, Cálem's Colheita 1961, Vista Alegre's 40 Year Old Tawny NV and Secret Spot 2016, Douro. Portuguese wines also received 11 Platinum medals, 25 gold medals, 181 silver medals and 233 bronze medals. Among the Platinum winners, three are fortified wines and eight are still wines, all rated 97 points.

A total of 250 Portuguese wines were awarded in the 2020 edition of the **International Wine & Spirits Competition**, including 4 Trophies in the Wine category for: Calém Colheita 1961, Ferreira Quinta Do Porto Vintage 2017, D'Oliveiras Boal 1980 and Quinta do Pégo Vintage 2017. In total, Portugal collected 250 medals, including 10 gold medals, 72 silver medals and 164 bronze medals.



Also, the American magazine **Wine Enthusiast**, in 2020, elected 5 Portuguese wines in the “**Top 100 Cellar Selection**” list, which it distinguished with scores above 93 points, with Quinta do Vale Meão 2017 Red (Douro) standing out in ninth position with 100 points, in 16th position, the Porto Ferreira 2018 Vintage wine also with 100 points. The other 3 Portuguese wines in the Top 100 are: Casa da Passarella 2015 Villa Oliveira Touriga Nacional (Dão) and W. & J. Graham's 2018 Quinta dos Malvedos Vintage (Port Wine) with 95 points and Aveleda 2018 Solos de Granito Alvarinho (Minho), with 93 points.

Producer Casa Ermelinda de Freitas was recognized by the **AWC Vienna International Wine Challenge 2020** as "Best National Producer".

There were six Portuguese wines in the “**Top 100 Best Wine Buys 2020**” by **Wine Enthusiast** magazine. The red wine Casca Wines 2017 1808 Colheita Syrah Castelão-Aragonez (Lisboa) from the Lisboa region won 15th place, with 90 points. In total Portugal won 6 nominations among wines from Lisboa, Douro, Tejo, Dão and Vinho Verde: #15 – 89 points - Casca Wines 2017 1808 Colheita Syrah Castelão-Aragonez (Lisboa), #20 – 90 points - Casa de Cambres 2016 Reserva Red (Douro), #33 – 91 points - Quinta da Alorna 2016 Reserva Red (Tejo), #57 – 89 points - Magnum Carlos Lucas Vinhos 2017 Tricana Red (Dão), #60 - 89 points - Adega Mãe 2019 Dory White (Lisboa), #93 - 88 points - Aveleda 2019 Loureiro-Alvarinho (Vinho Verde).

The regions of Bairrada, Douro e Porto were highlighted in the “**Top 100 Wine Discoveries**” by **Robert Parker magazine, Wine Advocate**. Portuguese wines continue to be talked about in the world, either for their quality or for their irreverence and capacity for innovation. Of the approximately 30,000 wines evaluated, 100 were chosen by the renowned group of critics of Robert Parker magazine, Wine Advocate, and among them are three Portuguese wines: Filipa Pato Nossa Missão (2016) Bairrada, Márcio Lopes Proibido Grande Reserva (2017) Douro, Kopke White Colheita Port (1940) Porto.

Portuguese wines totalled 147 medals in the **Sommelier Wine Awards 2020** competition, one of the most respected in the United Kingdom. Portugal collected 27 gold medals, 32 silver medals, 32 bronze medals and 56 “Commended”. There are also 4 special awards, given to Gold medal wines that have proved to be very good in special points and one of them is the “Pub & Bar” which was awarded to the DFJ Bigode Lisboa 2018 red wine as it is considered a good buy and very versatile.



The 37th edition of the **International Wine Challenge 2020** competition distinguished 698 Portuguese wines with 36 gold medals, 202 silver medals and 311 bronze medals and 149 “commended”. Of the 36 wines awarded gold medals, 5 also received Trophies, the highest distinction in the competition. The Portuguese wines awarded with Trophies at the IWC 2020 were: Bulas Vintage Port 2017, Justino's Madeira Terrantez 1978, Tyto Alba 2016, Quinta do Paral Selected Colheita White 2018, Fonte do Ouro Encruzado 2019. Portugal was thus the country that had the best performance in 2020, having included in these Trophies the overall winner Justino's Madeira Terrantez 1978, who received the final Champion of Champions award and the 2017 Vintage Port from Bulas Family Estates which was named Champion of Fortified Wines, the first time since 2012 that a Port Wine won this title.

At the **Cathay Pacific Hong Kong International Wine & Spirit Competition 2020**, the wine Adega de Pegões Grande Reserva Red 2017 was distinguished with the trophy for “Best Portuguese Wine of the year 2020”. In total, Portugal collected 72 medals, including 4 gold medals, 26 silver medals and 42 bronze medals. Apart from these awards, Portuguese wines were also awarded 2 gold medals, 8 silver medals and 4 bronze medals in the “Asian Food Pairing” category.

Seven Portuguese wines won a place in the “**Top 100**” of **Wine Enthusiast 2020**, one of the most renowned wine magazines in the world, all with more than 90 points. The Esporão Private Selection 2018 wine from Alentejo won the 27th position and was the Portuguese wine with the best ranking in the list with 95 points. The other wines in the Top 100 were: # 37 - Anselmo Mendes 2019 Contacto Alvarinho (Vinho Verde), #49 - Quinta do Crasto 2016 Reserva Vinhas Velhas Red (Douro), #63 - Quinta da Rede 2018 Grande Reserva White (Douro), #77 - Casa Relvas 2018 Herdade de São Miguel Escolha dos Enólogos Red (Alentejo), #94 Cossart Gordon 2008 Colheita Single Harvest Verdelho (Madeira), #99 DFJ Wines 2017 Aluado Reserva Alicante Bouschet (Lisboa).


Portugal had a wine in the “**Top 100**” by **Wine Spectator**, one of the leading publications in the wine world, the wine from the Douro region Wine & Soul Douro Pintas 2017. Every year the editors of Wine Spectator revisit the wines tasted during the year to choose the best ones, based on quality, price and availability in the market.



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