



# Spirits in Portugal

June 2024

Table of Contents

## Spirits in Portugal - Category analysis

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Spirits sales slow following dynamic growth in the previous year

Bitters and Tequila enjoy strong growth

Light ABV options surpass non-alcoholic drinks

#### PROSPECTS AND OPPORTUNITIES

Spirits are expected to be most affected by ABV tax revisions

Health concerns surrounding alcohol will lead to additional challenges for spirits

Recruiting consumers from younger generations to prove challenging

#### CATEGORY BACKGROUND

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

Summary 1 - Benchmark Brands 2023

#### CATEGORY DATA

Table 1 - Sales of Spirits by Category: Total Volume 2018-2023

Table 2 - Sales of Spirits by Category: Total Value 2018-2023

Table 3 - Sales of Spirits by Category: % Total Volume Growth 2018-2023

Table 4 - Sales of Spirits by Category: % Total Value Growth 2018-2023

Table 5 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023

Table 6 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023

Table 7 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 8 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023

Table 9 - Sales of Dark Rum by Price Platform: % Total Volume 2018-2023

Table 10 - Sales of White Rum by Price Platform: % Total Volume 2018-2023

Table 11 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023

Table 12 - Sales of English Gin by Price Platform: % Total Volume 2018-2023

Table 13 - Sales of Vodka by Price Platform: % Total Volume 2018-2023

Table 14 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023

Table 15 - GBO Company Shares of Spirits: % Total Volume 2019-2023

Table 16 - NBO Company Shares of Spirits: % Total Volume 2019-2023

Table 17 - LBN Brand Shares of Spirits: % Total Volume 2020-2023

Table 18 - Forecast Sales of Spirits by Category: Total Volume 2023-2028

Table 19 - Forecast Sales of Spirits by Category: Total Value 2023-2028

Table 20 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028

Table 21 - Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

## Alcoholic Drinks in Portugal - Industry Overview

### EXECUTIVE SUMMARY

Alcoholic drinks in 2023: The big picture

2023 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

Table 22 - Number of On-trade Establishments by Type 2017-2023

## TAXATION AND DUTY LEVIES

Summary 2 - Taxation and Duty Levies on Alcoholic Drinks 2023

## OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

## KEY NEW PRODUCT LAUNCHES

Outlook

## MARKET INDICATORS

Table 23 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

## MARKET DATA

Table 24 - Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 25 - Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 26 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 27 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 28 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 29 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 30 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 31 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 32 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 33 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 34 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 35 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Table 36 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 37 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 38 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

## DISCLAIMER

## SOURCES

Summary 3 - 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](http://www.euromonitor.com/spirits-in-portugal/report).