

ROAD MAP TO EXPORT:

KEY INSIGHTS INTO BRAZIL



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Additional stats OIV 12.5.26

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About UNSIGNED

BRAZIL EXPERIENCING RECORD-BREAKING GROWTH

Updated Information following OIV Announcement on 12 May 2026

Brazil is defying the global downward trend in wine. While traditional markets are shrinking due to falling consumption and vineyard uprooting, Brazil is experiencing record-breaking growth. Brazil expanded its vineyard surface area and saw major spikes in wine consumption.

Key OIV Data Highlights for overseas producers:

- **Explosive Consumption:** Brazil consumed 4.4 million hectolitres of wine, marking a massive 41.9% increase and reaching the highest volume in its recorded history.
- **The Global Contrast:** This boom opposes the worldwide trend, where global consumption has dropped to its lowest level since 1957
- Brazil's market for foreign wines is expanding rapidly, driven by a new generation of enthusiastic consumers. While domestic wine production focuses heavily on sparkling wine, **imported wines represent over 80% of all still wine sold** in Brazil.

This booming import sector is shaped by several distinct market drivers, consumer demographics, and category shifts:

Shifting Supplier Dynamics:

- **Mercosur Dominance:** Neighbouring countries Chile and Argentina traditionally dominate the market due to free-trade agreements.
- **The European Surge:** European imports are rapidly gaining market share. Wines from Spain, Portugal, and France are seeing significant growth as premium alternatives.
- **Policy Tailwinds:** Ongoing trade advancements between Mercosur and the European Union are making European imports highly strategic and more competitively priced

Changing Consumer Profiles:

While traditional wine markets are trying to recover consumers, Brazil is still actively forming a new generation of wine consumers.

And that could make Brazil one of the most strategic wine markets in the world over the next decade. Patricia Binz, Vinifera (on LinkedIn)

- **The Millennial Boom:** The **25–34 age demographic** is the fastest-growing wine-consuming group in Brazil
- **Concentrated Wealth:** While Brazil has a massive population, the core import market consists of roughly **30 million regular consumers** largely concentrated in the wealthy Southern and Southeastern states (São Paulo state alone consumes 45% of all wine sold).
- **Thriving Wine Clubs:** Brazil has a highly digitized wine culture, with over **300,000 active subscribers** to curated wine e-commerce clubs that frequently introduce foreign labels

Shifting Product Preferences:

- **Rising Interest in Whites and Rosés:** While **80% of Brazilian wine consumers still prefer red wine**, the country's warm climate is driving massive growth in white and rosé imports for more informal, casual drinking occasions. Rosé consumption alone has doubled.
- **The "Premiumisation" Trend:** Following an inventory correction post-pandemic, 2025 and 2026 data shows a strong pivot toward premiumisation. Educated consumers are increasingly willing to pay a premium for fine wines with a clear story, certified origin, and distinct terroir.

For foreign wineries looking to capitalise on Brazil's historic **41.9% consumption surge**, entering the market requires navigating a landscape that is highly lucrative but structurally complex. Because Brazil treats wine as a premium lifestyle product, successful market entry relies heavily on compliance, distinct positioning, and securing the right local gatekeepers.

The most effective entry strategies for foreign wineries are structured below.

1. Secure a Specialized Importer or Distributor:

Wineries cannot sell directly to retail or consumers; they must partner with an entity that holds a valid Brazilian **SISCOMEX import licence**. Exporters should target importers based on their portfolio tier:

- **The High-Volume Giants:** Entities like [VCT Brasil](#) (the distribution arm of Concha y Toro) have unparalleled mass-retail reach but demand highly competitive pricing

- **The Premium Specialists:** Importers like Mistral and World Wine focus heavily on building vertical, discoverable boutique brands. They are ideal for European and New World producers looking to establish a premium lifestyle presence.

2. Leverage B2B Wine Fairs to Find Partners:

Attempting cold outreach to Brazilian distributors rarely yields results. The most direct route to securing a partner is exhibiting at major regional trade events:

- **Wine South America:** Held annually in Bento Gonçalves, the [Wine South America Trade Show](#) acts as the premier hub for international wineries to pitch to over 7,000 corporate buyers and top-tier national importers.
- **ProWine São Paulo:** Strategically located in the financial and high-consumption capital, this event is vital for finding distributors who feed the lucrative São Paulo restaurant and e-commerce grid.

Data regarding its positioning as the primary hub for the Brazilian e-commerce, retail, and restaurant grid comes from [ProWein World's Business Reports](#). **Their data notes that over 50% of all wine and spirits imported into Latin America go directly through Brazil**, making this B2B fair the fastest gateway to secure licensed distributors

3. Optimize Pricing for Aggressive Local Taxes

Brazil's complex tax system (which includes Customs duties, Industrial Product Tax/IPI, and state-level ICMS taxes) often **triples the FOB price** of a bottle by the time it reaches a retail shelf.

- **The "Sweet Spot" Strategy:** Target the growing middle-to-premium segment rather than competing at the ultra-cheap baseline, where duty-free Mercosur neighbours like Chile and Argentina dominate.
- **Prepare for the EU-Mercosur Phase-Out:** European wineries should treat the market as highly strategic, as the advancing EU-Mercosur trade agreement is moving toward a scheduled tariff phase-out, making European labels progressively more price-competitive over the decade.

4. Pivot Marketing to "Lifestyle" and "Storytelling"

The modern Brazilian consumer—particularly the highly active 25–34 age demographic—is highly curious and eager to learn.

- **Focus on Terroir:** Brands should pitch a clear narrative regarding origin, history, and distinct terroir.
- **Target Digital Ecosystems:** Partner with prominent local wine clubs or tech-forward subscription boxes to gain immediate, widespread exposure to hundreds of thousands of active digital wine buyers.
- **Diversify the Portfolio:** While reds dominate, wineries should actively present crisp whites, premium rosés, or alternative packaging (such as smaller premium formats) to tap into casual, hot-weather consumption trends.

./. Original report follows

1. Why Brazil Matters to Wine Producers



Brazil is the largest economy in Latin America and one of the most strategically important wine markets in the Southern Hemisphere. While it is not yet comparable in scale to the US, UK, or China, it offers something increasingly rare in mature wine markets: **long-term structural growth potential**.

Brazil's importance lies in:

- Its population of over 200 million people
- A growing middle class with increasing exposure to international products
- A relatively low per capita wine consumption base
- Concentrated purchasing power in major metropolitan areas, particularly São Paulo

Unlike saturated European markets, Brazil is still in the process of defining its long-term wine identity. For international producers, this creates opportunity, but also complexity.

Brazil is not an easy market. It is highly regulated, logistically demanding, and price sensitive. However, for producers willing to understand its structure, Brazil offers access not only to a large domestic market but also to a regional trade hub increasingly connected to Latin American distribution networks.

ProWine São Paulo has become one of the primary platforms where this access is concentrated, allowing producers to meet importers, distributors, and regional buyers in one environment.

Brazil should therefore be seen as a **medium- to long-term strategic market**, not a short-term volume play.

2. Brazil as a Protected, Import-Constrained Market

Brazil has a domestic wine industry, concentrated in Rio Grande do Sul, and supported by protective taxation structures. Imported wines face:

- Import duties
- Federal taxes (II, IPI, PIS, COFINS)
- State-level ICMS taxation
- Complex customs procedures
- Currency fluctuation risk

These structural costs mean imported wines often retail at significantly higher price multiples compared to their ex-cellar price.

Implications for Producers

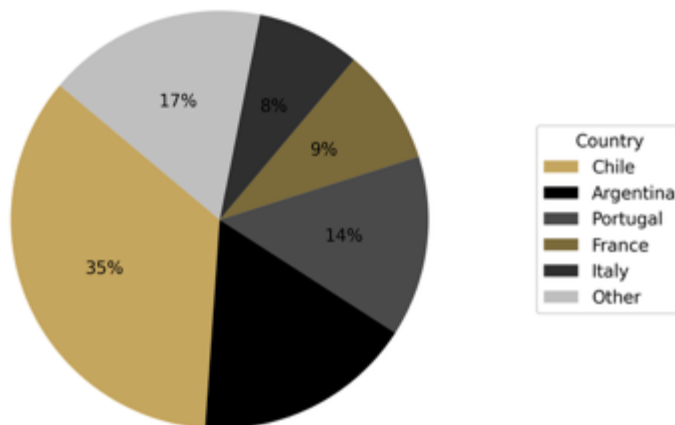
- Brazil is **not a margin-light supermarket market**
- Entry-level wines can become uncompetitive after taxation
- Premium and super-premium positioning is often more viable than entry-level pricing
- Importer partnerships are essential

This protectionist framework limits impulsive entry but also creates opportunity for producers who offer differentiation, authenticity, or premium positioning.

3. Market Profile and Consumer Behaviour

Main Wine Import Sources into Brazil

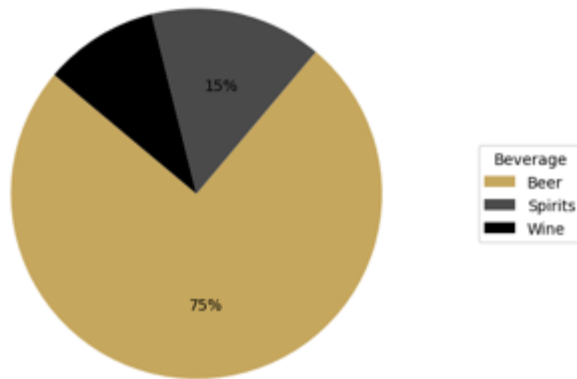
Brazil Wine Imports by Source Country (Estimated Share)



Explanation & Sources:

- Chile leads Brazil's wine import market, representing the **largest share** of wine imported by value.
- Argentina, Portugal, France and Italy follow as significant suppliers.
- "Other" aggregates smaller exporting origins combined (e.g., Spain, Australia, South Africa, etc.) which collectively still matter for diversification and premium positioning.

Alcoholic Beverage Consumption in Brazil (Estimated Share)



Notes & Sources:

- **Beer dominates** the Brazilian alcohol market, with about **75 % market share** among alcoholic drinks — by far the largest segment.
- Wine is smaller but growing, and spirits (including cachaça and other local distilled drinks) form a moderate share of consumption.

This is a simplified representation to show broad market structure. It excludes non-alcoholic beverages.

Brazil's per capita wine consumption remains relatively low compared with Europe. However, consumption is concentrated among:

- Urban middle and upper-middle-class consumers
- Younger, internationally exposed demographics
- Hospitality-driven occasions
- Corporate gifting and celebratory consumption

Key Consumer Characteristics

1. Red Wine Dominance

Red wine accounts for the majority of still wine consumption, particularly fuller-bodied styles.

2. Growing Interest in Premium Imports

Consumers increasingly associate imported wines with status and quality.

3. Education and Sommelier Influence

The sommelier community in São Paulo and Rio de Janeiro plays an important role in influencing premium purchasing decisions.

4. Price Sensitivity at Entry Level

While affluent segments are growing, broad consumer demand remains price conscious.

Unlike the UK, Brazil is not yet a fully “grape-variety-led” market. Origin and brand storytelling often carry significant weight.

4. On-Trade and Retail Landscape: A key visibility channel



In Brazil, the on-trade plays a more influential brand-building role than in the UK. High-end restaurants in São Paulo and Rio are major gateways for premium imports.

Placement on respected wine lists can:

- Establish credibility
- Support premium pricing
- Influence retail demand

The restaurant sector is concentrated in major cities, which means market entry can be geographically targeted.

However:

- Importers control most listings
- Payment terms can be extended
- Distribution is fragmented outside major urban centres

Specialist Retail

Brazil has a growing network of specialist wine shops and boutique retailers. These are:

- More open to imported wines
- Better suited to small-volume premium producers
- Focused on storytelling and education

Volumes are modest but margins can be more sustainable.

Supermarkets

Large retailers such as Grupo Pão de Açúcar and Carrefour Brasil operate nationally.

However:

- Listing fees can be significant
- Volume expectations are high
- Price competitiveness is critical
- Domestic producers have structural advantages

Supermarkets are realistic only for producers with:

- Strong importer backing
- Competitive landed pricing
- Reliable volume supply

5. Market Structure and Routes to Market

Brazil requires a **licensed importer**. Direct-to-trade selling is not viable without a Brazilian legal entity and compliance infrastructure.

Typical structure:

Producer → Brazilian Importer → Distributor (sometimes same entity) → Retail/On-Trade

Key considerations:

- Importers often specialise in premium portfolios
- Portfolio congestion is common
- Geographic coverage varies significantly
- Payment terms and working capital cycles can be long

Partner selection is critical. The wrong importer can stall momentum for years.

6. Pricing, Taxation and Currency Risk

Brazil is structurally expensive for imported wine.

Major cost components include:

- Import Duty (II)
- Industrialised Product Tax (IPI)
- PIS/COFINS
- State-level ICMS
- Freight and customs brokerage
- Importer margin
- Distributor margin
- Retail mark-up

A €3 ex-cellar wine can easily retail at €15–€25 equivalent once landed and distributed.

Strategic Implications

- Ultra-entry wines rarely compete successfully
- Premiumisation is often safer than discount positioning
- Currency volatility (BRL vs EUR/USD) affects long-term stability
- Long-term pricing agreements require caution

Brazil is therefore a market where producers must evaluate **landed price feasibility before engagement**.

7. Opportunities for International Producers

Despite complexity, Brazil offers genuine opportunity in:

Premium and Luxury Segments

Imported wines are strongly associated with quality and status.

Niche Origins and Boutique Producers

Brazilian consumers are increasingly curious about lesser-known regions.

Education-Led Sales

Masterclasses, sommelier engagement, and trade tastings significantly influence purchasing.

Concentrated Geography

Much of the country's wine purchasing power is concentrated in São Paulo, making targeted entry feasible.

8. Key Advantages at a Glance

- Largest economy in Latin America
- Growing wine culture
- Concentrated purchasing power
- Strong on-trade influence
- Premium positioning viable
- Increasing trade professionalism
- ProWine São Paulo as a centralised access point

9. Key Risks and Constraints

- High taxation and import duty
- Currency volatility
- Bureaucratic import procedures
- Portfolio congestion among importers
- Regional distribution fragmentation
- Slower cash cycles

Brazil is not a quick-win market. It requires patience, pricing discipline, and committed importer relationships.

10. Why ProWine São Paulo with UNSIGNED.

ProWine São Paulo has become the most important international wine trade fair in Brazil.

For producers, it offers:

- Direct access to importers
- Concentrated decision-makers
- Exposure to buyers from across Brazil
- Visibility within a premium trade environment



face is

Brazil is relationship-driven. Meeting buyers face-to-face is significantly more effective than remote outreach.

UNSIGNED. provides:

- Turnkey exhibiting
- Pre-show marketing to Brazilian buyers
- On-site support
- No commission on sales
- A curated environment for serious producers

For producers assessing Brazil as a strategic export market, ProWine São Paulo represents the most efficient and credible entry platform.

11. Conclusion: Strategic Takeaways for Producers

Brazil is:

- Structurally complex
- Tax-heavy
- Price sensitive at entry level
- Relationship-driven

But it is also:

- Large
- Growing in wine sophistication
- Premium-leaning for imports
- Increasingly trade-focused

Producers who approach Brazil with realistic expectations, premium clarity, and the right importer partnership can build sustainable presence.

Producers seeking quick volume without structural understanding are unlikely to succeed.

Brazil rewards patience, positioning, and partnership.

Appendix A. Recent Press & Market Commentary (Brazil)

1) Brazil Wine Market & Structural Trends

Brazil's wine market continues premium shift despite taxation pressures: *The Drinks Business*

Coverage of Brazil's structural tax environment and increasing premiumisation among imported wines. <https://www.thedrinksbusiness.com>

ProWine São Paulo confirms Brazil's strategic importance in Latin America: *The Drinks Business*. Trade reporting on attendance growth and importer engagement at ProWine São Paulo. <https://www.thedrinksbusiness.com>

Brazilian wine imports recover as premium demand strengthens: *Harpers Wine & Spirit*

Analysis of recovery patterns in imported wine volumes and value growth. <https://harpers.co.uk>

Brazil's complex tax system continues to challenge alcohol importers: *Drinks International*

Discussion of import taxation, compliance burden, and margin impact. <https://drinksint.com>

2) Market Data & Import Trends

IWSR: Brazil shows long-term growth potential for premium wine: *IWSR Drinks Market Analysis*

Data-led analysis highlighting premium segment resilience and urban concentration. <https://www.theiwsr.com>

Wine Intelligence: Brazilian urban consumers increasingly open to imported wine

Consumer segmentation insights and behavioural trends among middle-class buyers. <https://www.wineintelligence.com>

OIV Statistical Report – Brazil Consumption Overview: *International Organisation of Vine and Wine*

Contextual data on per capita consumption and import share. <https://www.oiv.int>

3) Retail & On-Trade Developments

Premium wine growth concentrated in São Paulo and Rio de Janeiro: *Valor Econômico*

Brazilian business press coverage of premium hospitality and retail expansion. <https://valor.globo.com>

Specialist wine retail expansion in Brazil's major cities: *Exame*

Reporting on growth of boutique wine retailers and consumer education. <https://exame.com>

Carrefour Brasil strengthens premium imported wine portfolio: *Carrefour Brasil Press Releases*

Retailer strategy updates on imported wine positioning. <https://www.carrefour.com.br>

Grupo Pão de Açúcar expands wine category investment: *GPA Corporate Communications*

Retail strategy insights and category development initiatives. <https://www.gpabr.com>

4) Regulatory & Taxation Commentary

Understanding Brazil's alcohol tax burden: *KPMG Brazil Insights*

Overview of indirect taxation structure affecting wine imports.

<https://kpmg.com/br>

Brazil import compliance and customs procedures for beverages: *PwC Brazil Trade Advisory*

Guidance on import licensing, documentation, and fiscal obligations.

<https://www.pwc.com/br>

ICMS reform debate and implications for alcoholic beverages: *Reuters Latin America*

Coverage of potential fiscal reform impacting state-level taxation.

<https://www.reuters.com>

5) Trade Fairs & Industry Events

ProWine São Paulo positions itself as Latin America's key wine hub: *Messe Düsseldorf / ProWine Press Office*

Event growth statistics and exhibitor data. <https://www.prowein.com>

<https://www.prowinesaopaulo.com>

Brazil strengthens international wine trade connections: *Decanter*

Market commentary on Brazil's increasing global trade presence.

<https://www.decanter.com>

6) Media & Industry Sources Worth Monitoring

Brazil Trade & Business Media

- *Valor Econômico* – Brazil's leading financial newspaper
- *Exame* – Business and consumer trends
- *Estadão (O Estado de S. Paulo)* – National economic reporting

International Trade Media Covering Brazil

- *The Drinks Business*
- *Harpers Wine & Spirit*
- *Drinks International*
- *Decanter*

Retail & Consumer Data

- NielsenIQ Brazil

- Euromonitor International
- IWSR

Regular monitoring of these outlets helps producers track taxation reform, currency movement, premiumisation trends, and importer activity.

Appendix B. Sources

The following sources were consulted in preparing this Brazil Market Road Map. Producers are encouraged to verify current data and regulatory requirements before making commercial decisions.

Government & Regulatory Bodies

Receita Federal do Brasil – Import procedures, federal taxation (II, IPI, PIS, COFINS)
<https://www.gov.br/receitafederal>

Secretaria da Fazenda (State Finance Secretariats) – ICMS taxation
State-specific portals (e.g., São Paulo SEFAZ) <https://portal.fazenda.sp.gov.br>

Ministério da Agricultura e Pecuária (MAPA) – Beverage registration and compliance
<https://www.gov.br/agricultura>

International Market Data & Industry Bodies

IWSR Drinks Market Analysis – Brazil wine market data <https://www.theiwsr.com>

Wine Intelligence – Consumer insights <https://www.wineintelligence.com>

International Organisation of Vine and Wine (OIV) – Global statistics
<https://www.oiv.int>

Euromonitor International – Brazil alcoholic drinks reports
<https://www.euromonitor.com>

Retail & Trade Organisations

Carrefour Brasil Corporate Communications <https://www.carrefour.com.br>

Grupo Pão de Açúcar (GPA) <https://www.gpabr.com>

Professional Advisory & Tax Commentary

KPMG Brazil <https://kpmg.com/br>

PwC Brazil <https://www.pwc.com/br>

EY Brazil Trade Advisory https://www.ey.com/pt_br

Trade Media

The Drinks Business: <https://www.thedrinksbusiness.com>

Harpers Wine & Spirit Trade Review: <https://harpers.co.uk>

Drinks International: <https://drinksint.com>

Decanter: <https://www.decanter.com>

Closing Note on Sources

All sources were accessed during 2024–2026.

Brazil's tax structure, import requirements, and commercial environment are subject to change. Before committing to contracts or pricing structures, producers should confirm:

- Current federal and state tax rates
- Import licensing requirements
- Currency exposure
- Distribution compliance obligations

Disclaimer.

This report is provided in good faith for informational purposes only. Taxation, import procedures, and market conditions in Brazil are subject to change. Producers are advised to seek independent professional advice before entering into commercial agreements.

March 2026



About UNSIGNED.

UNSIGNED. was created 10 year's ago (originally under the name Wines Unearthed) to give quality wineries a clear and direct route to buyers. Our dedicated space brings together 'new to market' producers from all over the world and attracts buyers looking for just that fresh, undiscovered talent.

You won't be starting from scratch!

- **UNSIGNED.** organises great value, turnkey exhibition stands for producers looking for distribution.
- Being part of the UNSIGNED. collective means you will be exhibiting alongside a group of like-minded international producers – you won't be on your own!
- On-site support, printed brochures, online presence and social media marketing plus pre-show marketing/promotion to buyers
- Road Map Insight Reports to all key markets relevant to individual fairs.
- All commercial relationships remain directly between producer and buyer. **UNSIGNED.** takes no commission on sales.

Find UNSIGNED. at the following Fairs:

Vinexpo Asia in Hong Kong: 26-28 May 2026:

<https://unsignedwineandspirits.com/vinexpo-asia>

Hong Kong is a key regional wine hub, offering strong growth potential, high engagement with international products and an ideal environment for premiumisation.

ProWine São Paulo: 6-8 October 2026:

<https://unsignedwineandspirits.com/brazil>

Hosted in Brazil's commercial capital, this fair offers international producers direct access to decision-makers across Brazil and Latin America.

Wine Paris: 2027: <https://unsignedwineandspirits.com/wine-paris>

We are limited to 55 stands in Paris and the 2026 edition was completely sold out. Please send us an email if you're interested.

Other Fairs for 2027 will be added soon. Keep an eye on our mailings and our web site for updates.

WHAT'S IT LIKE EXHIBITING WITH UNSIGNED?

Producers at Wine Paris 2026 described the experience as both seamless and impactful. Michela Benigni of Aldo Rainoldi (Italy) thanked us for the "brilliant organisation, as always," highlighting valuable new contacts and future business potential. Paul Pujol of Prophet's Rock (New Zealand) called it "an amazing event" that was "ultimately very successful," generating international leads and key media engagement. Others spoke of "good energy and promising conversations" and a "truly positive experience" throughout.

www.unsignedwineandspirits.com