

## **NIGERIAN WINE MARKET RESEARCH AND MOLDOVAN WINE EXPORT PERSPECTIVES**

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*The growth pattern of the alcoholic beverage market suggests that the taste and preference of Nigerian consumers have changed to wine as a beverage drink of interest, especially for relaxation, at important functions and major celebrations. However, to meet these needs, consumers are reliant on the import of quality wines made from grapes from the main wine producing countries. Therefore, the growth in the Nigerian wine market has relied mainly on bottled foreign wines and the imported bulk wine from foreign wineries, bottled and packaged as local brands. Social demographic variables and consumer preference were analyzed and reported as important to the wine market. However, one of the determinant of purchase and consumption was not investigated – the role price in wine consumption pattern and behavior. It is pertinent to study the drivers or motivation factors of the wine drinkers so that strategy for marketing wine to real and potential consumers can be improved. This article reflects some results of the Nigerian sale market research from the perspective of capitalizing on the export potential of Moldovan wines.*

**Key words:** *Nigeria, Moldova, wine market, export, perspectives*

**JEL classification:** *D40, D90, E00*

### **Introduction**

Nigeria is not a wine producing country although few small to medium scale producers exist. Historically, local wines such as burukutu and palm wine have been in existence for ages before the modern commercial production of wine. Commercial wine production started with the processing of non-grape locally grown fruits like pawpaw and pineapples. Currently, the wines from the local wineries are not meeting the needs of the current consumers hence demands have shifted to foreign wine.

This article reflects some **results** of the Nigerian sale market research from the perspective of capitalizing on the export potential of Moldovan wines.

**The literature** is yet inconclusive about the impact of uncertainty on wine consumption [15]. The COVID-19 crisis has disrupted distribution channels and reduced social interactions, suggesting a strong reduction in wine consumption frequency. The data enables us to analyze from the perspective of wine drinkers whether their consumption of other alcoholic beverages has been affected in the same way during the lockdown.

**Research Methods and Methodology.** The following methods were used in the article: induction, deduction, comparison, graphic method, etc.

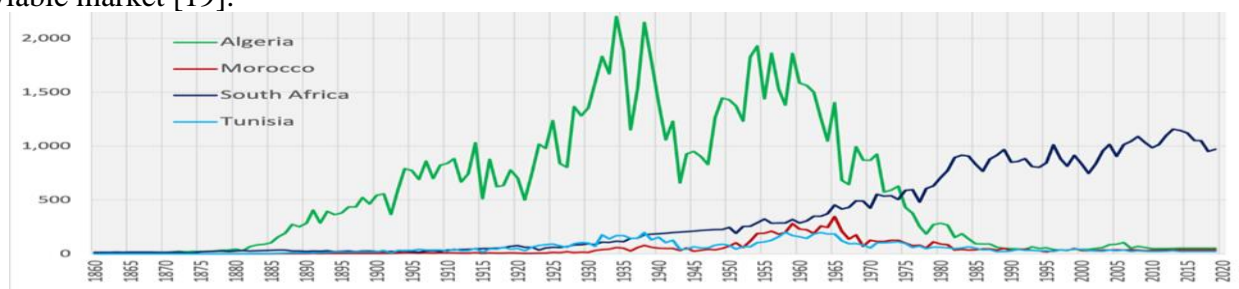
In the Nigerian alcoholic beverages market, wines account for about 15% of the total value of US \$ 2 billion and an annual increase of almost 6%. In dollar term, the value of the Nigeria wine industry is US\$370 million. The consumption of wine as an alcoholic beverage was almost non-existent, only in the 1990s that alcohol drinkers started to warm up to wine [22]. The adoption of wine consumption has grown but still low compared to developed countries as wine is seen from an exclusivity perspective as a drink for the elite group. However there is a growing consumer demand for wine in Nigeria, the growth rate superseding that experienced in other alcoholic drinks categories [22].

This is small when compared to similar market in South Africa – the main producer in Africa (Fig.1) and the other major wine producing countries such as France, Italy, Spain, United States of America, China, Argentina, Australia, Chile, New Zealand, Moldova and Russia. Nigerian consumers represent a strong market for local and foreign branded wines with its large population of 160 million and its appetite for the kinds of consumption that characterize developed countries. It

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is expected that under appropriate marketing condition, the consumption of wines can create a viable market [19].



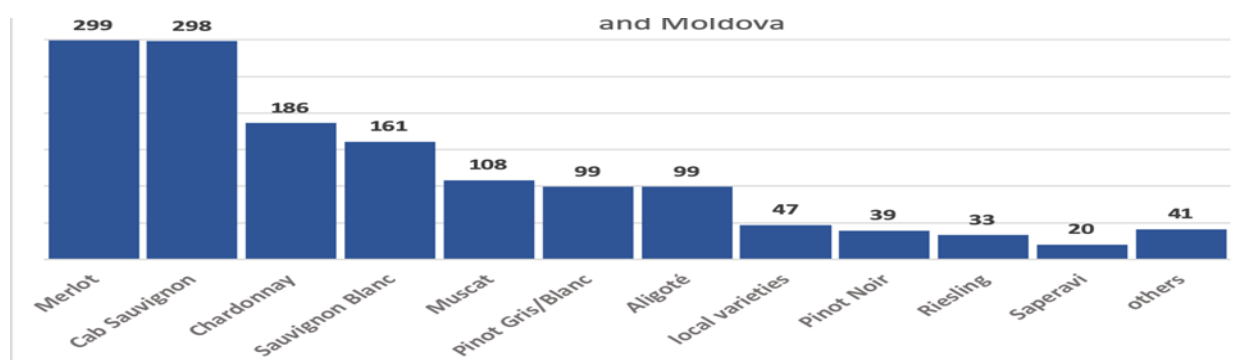
**Figure 1. Wine Production of Top 4 Producers in Africa, 1860-2020**

Source: *Annual Database of Global Wine Markets, 1835-2018* [13]

Consumers use wine as a social product, its consumption has been an essential part of culture – even in the most primitive culture. Wine plays a significant role in social events. Wine consumption evokes a social status to consumers in the eyes of the public and can be used to signal equality or social membership amongst consumers [18]. Furthermore, consumers use wine to express gratitude, for relief from thirst, for toasting to successful business agreements and is increasingly gaining preference as a gift item during festival periods [9].

Wine is perceived to be complex. It is perhaps best to argue that complexity is an intangible rather than a physical attribute [14]. Therefore, the complexity of wine can be assessed by how much the effect the various wine elements, harmoniously knit together, impart a sensation that is intriguing, provocative and engages the mind or captures the consumers' interest [16]. The taste of wine is the most important value attribute considered by wine consumers and taste has a strong relationship with choice [7], so when taste cannot be assessed, it creates uncertainties which impact on consumer behavior.

The bottled wine on average was consistently the most popular drink in all household income bands, followed by regular strength beer, spirits and RTDs and that the popularity of bottled wine increased as a function of increase in consumers' household income. We mention that, based on the research on the preferences for red / white / rose wine, the structure of Moldovan wine exports should be adjusted (Fig.2). So, red wine consumers appear to be the more relaxed of wine drinkers. It was also found that those who drink red wine are more likely to have a degree, be married and drink more frequently than their white and rose wine-drinking counterparts. White wine drinkers were found to be more content with their current job positions with little interest in climbing the corporate ladder, red wine drinkers described themselves as confident, relaxed, strong and intelligent, whereas white wine drinkers chose terms like practical, bright, shy, quiet and reserved to describe themselves. Rosé drinkers called themselves loud, warm and charming [20].



**Figure 2. Volume of Wine Production in Moldova by Variety, 2017, in 1000 hl**

Source: *C.Gilby (2019). The wine of Bulgaria, Romania and Moldova* [4]

How consumers form their preference for different wine brand can be dependent on how much knowledge of the product attributes at their disposal. Consumers use different measures to assess wines to determine its quality. Different grapes, vineyards, or countries have peculiar attributes that make wine different. For the most part, this individual difference results in unique characteristics imparted to the wine by geographic conditions, viticulture methods, and the winemaking process. To determine the uniqueness of attributes of wine (particularly taste), sensory evaluation is needed, making it an experience product [18].

Some wine attributes can be subjective making it dependent on the consumer’s degree of knowledge. Hence, consumers experience difficulties in processing the quality cues (intrinsic and extrinsic) relevant for determining good quality wine. While consumers can use intrinsic or extrinsic cues individually or collectively to facilitate the purchase decision process, extrinsic cues are considered lesser value cues, as altering them does not alter the product itself, the use of intrinsic – (or higher-level) cues has a strong link to product knowledge [8]. Therefore, the use of intrinsic clues is dependent on the consumers’ product knowledge which in turn determines the perceptions of the product itself with the likelihood of perceptual bias occurring [6].

This studies is important as the Nigeria wine market though growing is at infancy and understanding the drivers or characteristics that influence the behavior of consumers is critical to the growth of this emerging market. On these assumptions, the study sets out to deconstruct the alcoholic beverage consumption patterns to the growth of this emerging market and thus increase the export of Moldovan wines.

**Table 1. Moldova,s Wine Exports in 2018**

		Volume <i>million liters</i>	Price <i>US\$/liter</i>	Value <i>million US\$</i>
	<b>World</b>	<b>138.682</b>	<b>0.99</b>	<b>137.934</b>
1	Belarus	47.526	0.59	28.002
2	Romania	11.853	1.34	15.919
3	Czechia	9.981	1.31	13.030
4	Russian Federation	12.494	0.91	11.431
5	China	5.852	1.90	11.115
6	Poland	6.111	1.65	10.101
7	Georgia	15.097	0.62	9.427
8	Ukraine	6.504	0.94	6.105
9	Kazakhstan	2.817	1.64	4.608
10	Germany	5.403	0.84	4.535
11	United Kingdom	3.963	1.01	4.021
12	Canada	1.606	1.57	2.514
13	USA	0.912	2.04	1.859
14	Slovakia	1.511	1.17	1.776
15	Latvia	0.870	1.86	1.615
16	Netherlands	0.913	1.47	1.341
17	Lithuania	1.154	0.98	1.129
18	Nigeria	0.366	2.71	0.991
19	Japan	0.270	2.51	0.679
20	Kyrgyzstan	0.278	1.54	0.429

Source: AAWE. Wine economics; ComTrade. 2018

Thus, exports to Nigeria have an undervalued place in the portfolio of Moldovan wine exports to foreign markets (Tab.1), given that the intensity of wine exports is traditionally quite high (Fig.3) and the volume of world wine exports demonstrates the trend maintaining volumes, including by categories during the Covid-19 pandemic (Fig. 4), with a slight decrease in value (Fig. 5).

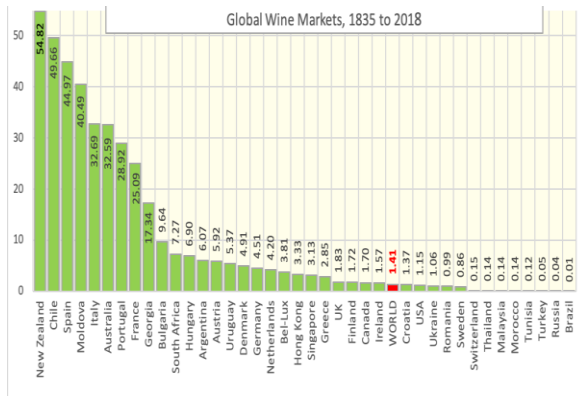


Figure 3. Per Capita Wine Export Worldwine, 2018

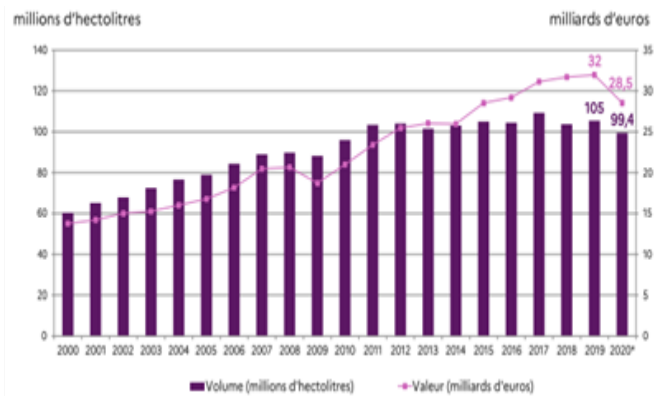


Figure 4. Evolution of world wine exports during 2000-2020

Source: K.Anderson, V.Pinilla, 2020

Source: OIV and Trade Data Monitor [21]

Annual Database of Global Wine Markets, 1835-2018

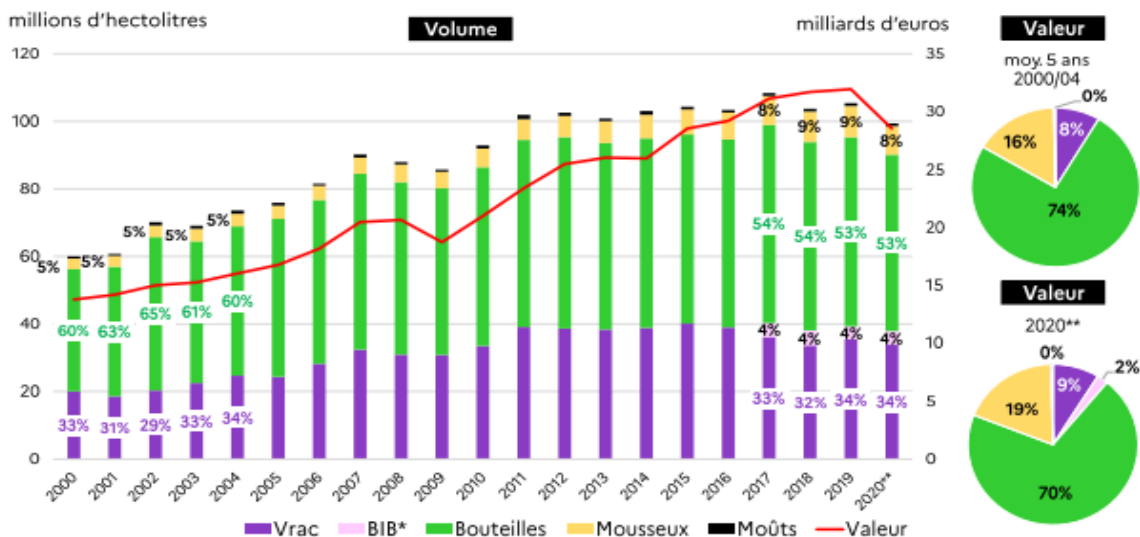


Figure 5. The evolution of world wine exports in volume and value, 2000-2020 by categories  
Source: OIV; Trade Data Monitor

The result of the interviews with the 76 participants from wine suppliers in Lagos Island, Nigeria indicates that the common themes include human resources, management and market related factors.

*The Human Resources Factors.* 50 of the 76 participants stated that most of the wine distributors in Lagos Nigeria have been able to take effective advantage of their human resources to improve the efficiency and effectiveness of their last mile distribution. Furthermore, 50 participants explained that they have also had to directly sell the wine products in a bid to facilitate door to-door-sales and to reach a significant number of local customers at their different locations. Fig.6 illustrates the results of human resources factors impacting last mile distribution.

The participants explained that they recorded improvements in their last mile distribution by employing several truck and van drivers to facilitate the faster movement of freight from terminals, ports, depots and wholesalers to retailers and finally to consumers. Considering that labor costs are generally relatively quite low in Nigeria, 50 participants in 2015 argued that the relatively low human resources costs have not only enabled them to reduce the final prices significantly, but also led to increased speed and efficiency in the delivery of their wine products to the final consumers, while in 2021 about 60 participants share this same opinion.

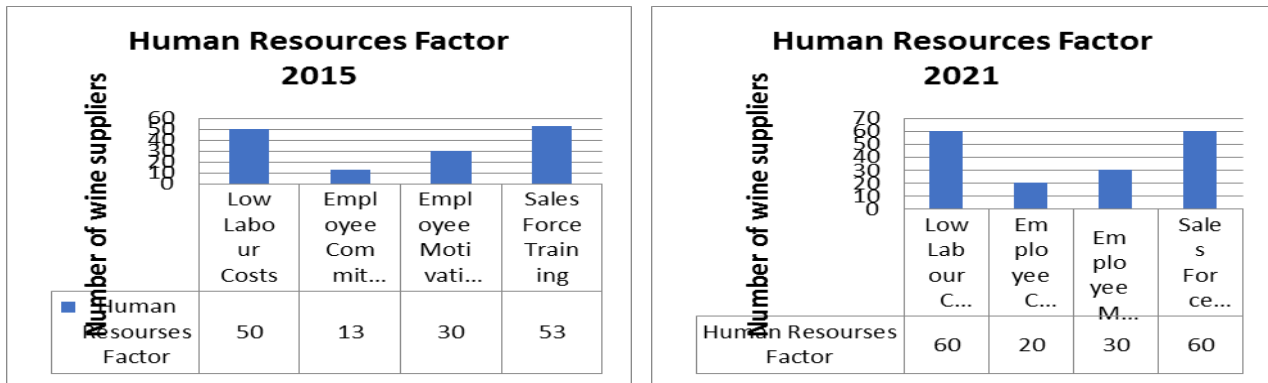


Figure 6. Human Resources Factors Impacting Last Mile Distribution Source

Source: Researcher's own analysis

In 2015 13 of the participants noted that the commitment which has been demonstrated by most of their employees also made it possible for them to ensure that products reach the final consumers as fast as possible, while in 2021 about 20 participants share this same opinion. They explained that most of the employed drivers and off-loaders are quite willing to work overtime and night hours to ensure that products are delivered during the times when congestion and heavy traffic on the roads are minimal. In 2015 30 respondents agreed that the levels of employee motivation have been significant in influencing the effectiveness of last mile distribution.

*The Management Factors.* The analysis of participants revealed that the management-related factors that affect the effectiveness of the last mile distribution include management commitment, third party logistics providers, door-to-door couriers, as an efficient distribution tool during the Covid-19 pandemic, partnership with customers, and location decisions during the establishments of depots. Fig.7 illustrates the management factors in last mile distribution. Regarding management commitment, 32 respondents explained that the achievement of an effective last mile distribution involved several factors including investments in trucks, storage facilities and constant research, evaluation and improvement in the general effectiveness of the last mile distribution. In 2015 32 participants explained that an effective last mile distribution network requires managers to demonstrate commitment that entails working overtime, constant evaluation and improvement of the process and making finances readily available in case of need. These respondents also explained that so far, evidence indicates that those managements who are less committed, have faced challenges such as limited trucks and a poorly committed management which result from the manager's failure to ensure that all employees are well remunerated. while in 2021 about 32 participants share this opinion which is the same as 2015. These respondents to suggest, the use of the Internet, freight courier companies and the integration of transportation influence the effectiveness of last mile distribution, without management commitment, those strategies may not have a significant impact on the last mile distribution in the Nigerian context.

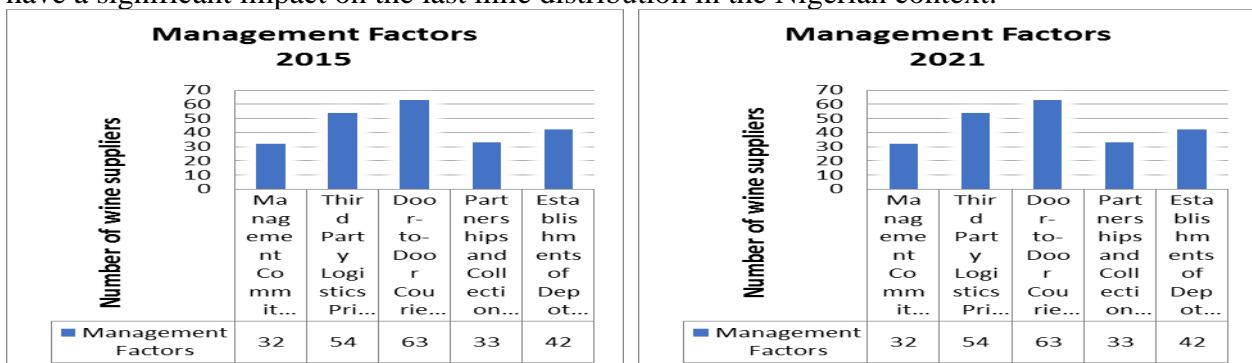


Figure 7. Management Factors in Last Mile Distribution

Source: Researcher's own analysis

The overall analysis of the primary findings would suggest that the kinds of management-related factors that influence the effectiveness of last mile distribution include management commitment, third party logistics providers, door-to-door couriers, partnership with customers, and location decisions during the establishment of depots. Interviewees revealed that through the development of effective last mile distribution, they are able to meet their market-related needs that include the provision of quality freight services, low costs, meeting customers' expectations, and provision of information and communication, participants also revealed that the effectiveness of last mile distribution is hampered by a number of limitations.

*Factors Limiting the Transportation of Wine.* Most participants revealed that the effectiveness of the last mile distribution network is also affected by distribution limitations, management-related limitations, ports and terminal-related limitations, customer-related limitations, and governmental limitations.

*The Distribution Limitations.* Regarding distribution limitations, most participants felt that effective last mile distribution for the Nigerian wine suppliers is hindered by the lack of effective urban/ rural distribution centers, poor usage of the Internet, poor transportation facilities, and a competitive door-to-door delivery market. It is noted in Fig.9 that 55 participants mentioned that a lack of effective distribution centers seems to affect the effectiveness of the last mile distribution. Most wine suppliers in Nigeria tend to operate on smaller scales, with the effect that they only use shops with limited storage facilities.

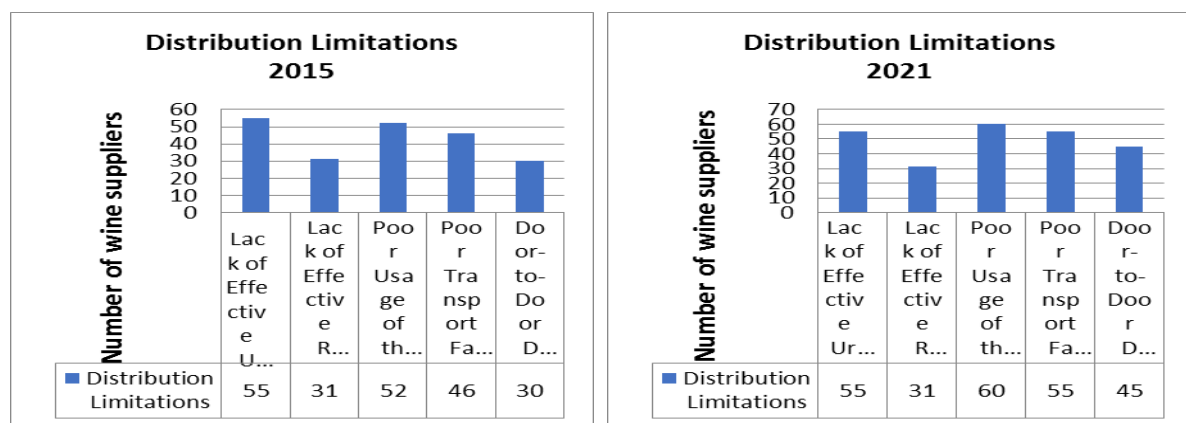


Figure 9. Distribution Limitations in Last Mile Distribution

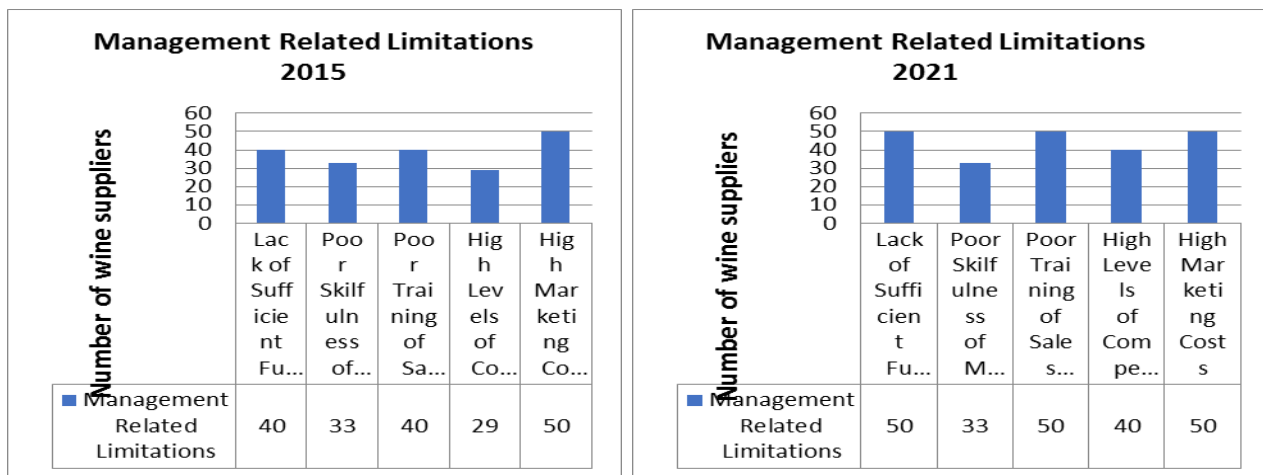
Source: Researcher's own analysis

In the absence of effective large scale urban distribution centers, it will be difficult for them to effectively address the challenges they are facing. In addition to the lack of effective urban distribution centers, in 2015 55 respondents indicated that due to increasing congestion, traffic and costs that are involved in the establishment of urban distribution centers, most wine distributors in Lagos Island, Nigeria would have considered setting up rural distribution centers. A number of industries are adopting the use of the Internet as a means of improving the effectiveness of last mile distribution. In 2015 52 participants explained that they, along with final customers, face significant challenges in using the Internet for this purpose. While in 2021 about 60 participants share this opinion. They spoke of the fear of hackers and fraudsters in the use of e-commerce. Despite the fact that there are limitations arising from lack of sufficient funds to invest in information systems, these respondents also expressed concerns that even if e-commerce were used, the process of delivering the actual wine products cannot be accomplished online, but through vans and trucks that can still contribute to congestion and traffic.

Although door-to-door delivery is used by all the wine suppliers, in 2015 indicates that 30 of them stated that this is still hampered by congestion and traffic. They also noted that door-to-door delivery is experiencing challenges associated with the poor planning of urban centers that

sometimes make it difficult to locate certain customers in rural locations. while in 2021 about 45 participants share this opinion. The consequence is that the trucks or vans engaged in door-to-door deliveries usually get lost, thereby leading to delays and slowing the processes of moving the wine products to the local customers.

*Management-related Limitations.* The thematic evaluations of the results of the interviews indicate that management-related challenges which are limiting the effectiveness of last mile distribution include lack of sufficient funds, poorly skilled managers and employees, poor training of the sales force, high levels of competition, and high marketing costs. Fig.10 in 2015, shows that 40 participants explained that lack of funds limited the extent to which management is able to invest in all the facilities required to facilitate effectiveness. While in 2021 about 50 participants share this opinion. They also noted that the last mile distribution for the wine products would be improved if there were multiple distribution points in different parts of Nigeria. They explained that this would enable them to bypass several challenges including congestion and traffic. 50 participants also noted that limited funds have hampered investment in a significant number of trucks. In effect, they revealed that most wine distributors tend to subcontract or outsource the delivery of wine to courier companies that are well resourced. However, as they explained, the downside of such a strategy has been that they have been unable to save costs resulting in their not being able to offer their wine products cheaper in order to attain price advantages over other beverage dealers. In line with the revelations of these 40 participants, wine consumption is still viewed by a significant number of Nigerians as the drink for the most affluent due to the premium prices charged.



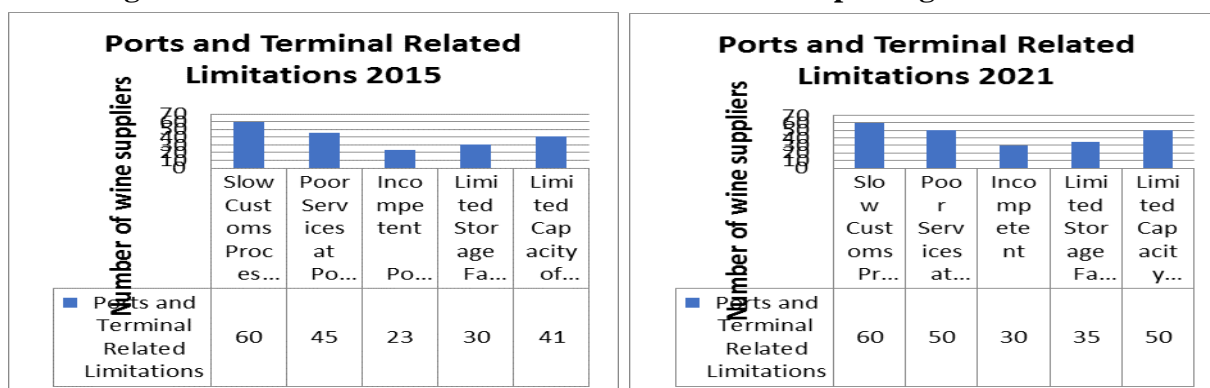
**Figure 10. Management Related Limitations in Last Mile Distribution**

*Source: Researcher's own analysis*

33 participants also noted that the effectiveness of the last mile distribution is limited by the inability of managers and employees to ensure that it is constantly evaluated and improved in accordance with changes in the modern business environment. While in 2021 about 33 participants share this opinion which is the same as in 2015. The poor skills among managers and employees are one of the challenges facing the effectiveness of last mile distribution. Other challenges identified include high levels of competition, 29 participants in 2015 which increases to 40 in 2021 and 50 participants in 2015 believed that high marketing costs make it difficult for them to obtain more customers. While in 2021 about 50 participants share this opinion which is the same as 2015. Participants explained that without a significant number of customers, the effective movement of wine products is significantly hampered.

*Ports and Terminal-related Limitations.* Interviewees explained that ports and terminal-related limitations that they contend with include slow custom processes, poor services, incompetent officials, limited storage facilities, as well as limited capacity of ports and terminals.

Figure 11. Ports and Terminal Related Limitations impacting on last mile distribution



Source: Researcher's own analysis

In 2015 60 participants explained that most customs services are quite slow and do not guarantee the quick clearing of wine consignments ordered from foreign countries for distribution to the customers. While in 2021 about 60 participants share this opinion. According to these participants, these delays of the customs processes slow down the effectiveness of wine distribution. They also attribute poor customs service to the shortage of personnel (Fig.11). In 2015 45 participants also pointed out challenges associated with the fact that most companies providing port services have not invested in the upgrading of their equipment to ensure that they use more efficient modern equipment, while in 2021 about 50 participants share this opinion. They explained that a number of the Nigerian ports do not have sufficient capacity and storage facilities, and in effect in a number of cases, arriving cargoes are forced to remain on board until storage space is created. These views are corroborated by 30 other interviewees in 2015 who identified the lack of effective storage facilities at the ports as a problem, while in 2021 about 35 participants share this opinion. Similarly, 41 participants in 2015 noted that lack of adequate capacity limits the ability of the existing terminals and ports to effectively and efficiently handle the workload resulting from the increasing volumes of cargo. While in 2021 about 50 participants share this opinion. 23 participants in 2015 also stated that because most workers at the ports and terminals are incompetent, they are unable to effectively and efficiently accomplish the management of the constant inflow of cargo. This creates conditions that make it difficult for imported wine products to be transported efficiently and speedily to the wholesalers and subsequently to the retailers. While in 2021 about 30 participants share this opinion.

*Customer-related Limitations.* Participants include impatient customers, lack of loyalty, ignorance, limited Internet usage, wide ranging scarcity of wine in different remote rural locations, demand for low cost goods, and a gradual shift in drinking habits towards wine consumption. 20 interviewees stated that impatient customers are a problem for the effective accomplishment of last mile activities. While in 2021 about 20 participants also share this opinion which is the same as in 2015. They noted that because there are numerous suppliers, final customers find it easier to switch from one source to another in the event of a delay.

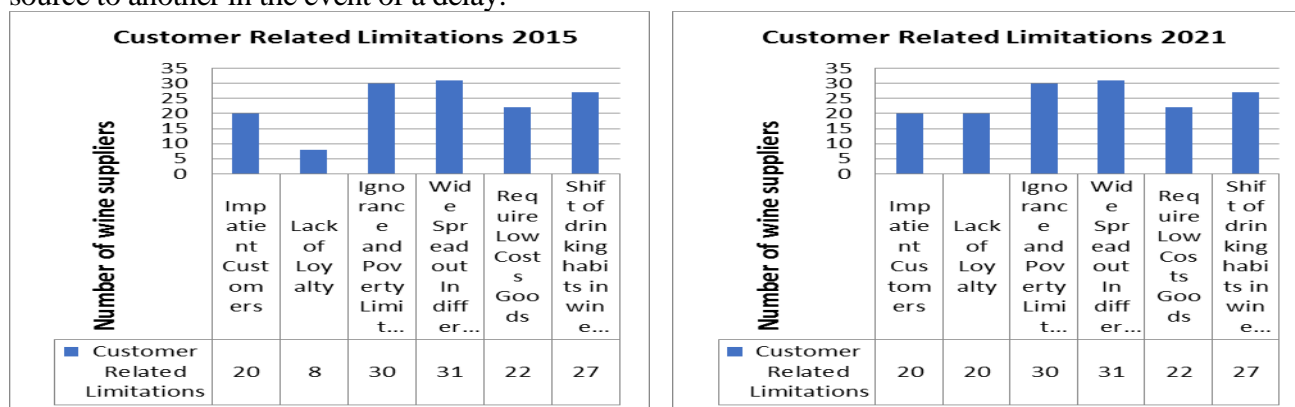


Figure 12. Customer Related Limitations on Last Mile distribution activities

Source: Researcher's own analysis



The implication is that the same goods must be reloaded and transported back at the cost of the supplier. These unnecessary costs subsequently add to the general operational costs of managing freight movements. Although building good customer relationships is one of the strategies through which impatient customers can be effectively managed, participants noted that practice has proven that it is possible to deal with impatient customers who are unwilling to compromise their demands for efficient and effective services. The views of these participants suggest that it is not possible to effectively manage the last mile distribution without the cooperation and inclusion of customers as partners in the chain (Fig. 12).

Despite the fact that their views substantiate the opinions of 8 other participants who expressed concerns about lack of customer loyalty, while in 2021 20 participants also share this opinion. In 2015 30 interviewees stated that ignorance of Internet usage among most Nigerian wine customers has made it impossible for them to use the Internet as a means of reducing challenges in the last mile distribution. While in 2021 about 30 participants also share this opinion which is the same as in 2015. 31 interviewees stated that the wine customers spread out in the different parts of Nigeria also render the transportation of wine from the wholesalers to the retailers difficult and costly. While in 2021 about 31 participants also share this opinion which is the same as in 2015. Yet, as 22 of the participants noted, most wine customers usually require price cuts which cannot be provided in view of increasingly costly last mile distribution processes, while in 2021 about 22 participants also share this opinion which is the same as in 2015. Although in a number of instances, the wholesalers are able to transport wine to retailers effectively. 27 interviewees explained that there is still a significant challenge experienced in convincing consumers to shift their drinking habits in favor of wine, while in 2021 about 27 participants also share this opinion which is the same as in 2015. This challenge implies that whereas improvement in the efficiency of last mile distribution would influence the effective movement of wine products to the customers, the customers get stuck with a significant amount of wine.

*Governmental Limitations.* Participants noted that governmental limitations affect the last mile distribution negatively. Issues they highlighted are poor strategic partnerships with government departments, poor road facilities, high levels of congestion and traffic, corruption among government officials, changes in import regulations, and high import duties. 45 participants felt that there were limited partnerships between ordinary businesses and government (Fig.13). In 2021 about 45 participants also share this opinion which is the same as in 2015. They stated that partnerships between government and business can be achieved through activities such as road improvements and construction, improving the speed of customs services, and the expansion of ports and terminal facilities. 34 interviewees explained that most roads that are presently used are full of pot holes, while in 2021 about 34 participants also share this opinion which is the same as in 2015. Although the improvements of such roads do not fall within the domain of the private sector, strong partnerships between the private sector and government would significantly result in the development of roads. This will in return facilitate the faster and quicker movement of wine products from the wholesalers to the retailers and subsequently to the final consumers.

Designated lanes for moving freight can ease traffic congestion and allow goods to be moved faster. Although cutting costs is one of the strategic objectives that they seek to achieve. In 2015, 33 participants noted that the increasing corruption and demand for bribes by some Nigerian government officials have resulted into cost escalations. While in 2021 about 45 participants also share this opinion. Furthermore, these participants explained that demands for bribes by government officials make the effective accomplishment of ports and terminal services difficult. They say cargo owned by those who offer bribes are cleared faster than those who refuse. It results in the latter having to wait months before they are cleared. This affects the speed and efficiency at which the wine consignments are delivered from the ports to the consumer. Additionally, in 2015 45 suggested that high import duties also increase costs. While in 2021 about 60 participants also share this opinion. In whole, it is quite clear that in terms of the distribution limitations, management limitations, ports and terminal related limitations, customer limitations and governmental limitations are the factors that mar the effectiveness of last mile distribution for the wine suppliers in Lagos Island, Nigeria.

### **Conclusions**

From an economic perspective, the COVID-19 crisis has been an exogenous shock to most local and international markets. Due to the COVID-19 pandemic, physical separation (or social distancing) to prevent the spread of the virus has led to feelings of isolation and loneliness, increasing the prevalence of depression, anxiety, post-traumatic stress disorders, and insomnia in the population. However, during the lockdown, technological devices have provided a way for people to maintain social connections with friends, family, their social networks, and/or the wider community. Digital socialization has created new occasions for alcohol consumption. The mobile phone application WhatsApp, for example, provides opportunities for synchronous drinking in virtually connected, spatially separated locations.

This study tried to create an understanding of the Nigeria wine market from the consumer perspective. The intent is to know the characteristics of the wine consumers and their preference which are important aspects of market analysis. The study established that the wine market has a large population of educated and highly paid consumers. The social demographic distribution of the respondents is an indication that it is a product consumed mainly by the 'middle class' through to the 'high class' members of the society. Therefore, wine consumption mainly resides in the domain of these classes of the society members.

Consumers' preference for wine favours foreign wine whether imported as bottled wine or bulk - bottled and branded in Nigeria as local brand. However, the preference for the 'Made in Nigeria' wine and the local natural palm wine among consumers is strong. The 'Made in Nigeria' wine has poor perception relative to the imported ones. It is important to note that the ingredients are not the same. The majority of the imported wine were made from grapes and the local ones were made from pineapple and other non-grape fruits. The taste will never be the same as those made from grapes. There is the need to create brands out of them that are totally unique. This will disallow the comparison of the home made wine against the imported ones. This approach will help to eliminate the negative perception arising from comparison.

The natural palm wine despite the preference suffers from inadequacy in supply and unstable quality. Production of palm wine is hindered by lack of direct effort to grow palm trees for the wine. Production of palm wine has always come from backyard, wild palms or abandoned palm estates that have outlived their primary purpose. The wine lacks consistency in quality due to the natural condition it is exposed to, if not preserved. That makes the taste to continually change due to uncontrolled fermentation process. Preservation of palm wine is strongly encouraged to continue but must maintain the product as natural in taste as possible. Effort must be made to set a standard for defining and assessing the quality of palm wine such that the product is able to receive the real market value.

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