



Bourgogne Wines Press Kit
2016 Hospices de Beaune Wine Auction
November 2016


BOURGOGNES
Bureau Interprofessionnel
des Vins de Bourgogne



BIVB Press contacts:

Cécile Mathiaud
Head of PR

Tel. +33 (0)3 80 25 95 76 - +33 (0)6 08 56 85 56
cecile.mathiaud@bivb.com

Mathilde Paturaud
Press Attaché

Tel. +33 (0)3 80 25 06 96
mathilde.paturaud@bivb.com

@BourgogneWines



#VentesdesVins

#BourgogneWines

The 2016 Vintage in the Bourgogne Wine Region: a pleasant surprise	P. 3
The weather in the Bourgogne wine region in 2016: one extreme to another	P. 5
The 2015 Vintage: simply Sublime!	P. 9
Bourgogne wine regaining share in some markets	P.11
An active advance trade market for certain appellations.....	P. 11
Export: the trend for recovery confirmed in some markets.....	P. 13
France: Bourgogne wines retain strong presence on traditional circuits	P. 19
The essential guide to wine tourism: En Route vers les Bourgognes	P.21
Take flight with the short film, the Vineyards of Bourgogne, seen from the sky....	P.24

Annexes:

- *Key figures for the Bourgogne wine region*
- *Press release Climats du Vignoble de Bourgogne*
- *Press release Groupement des Jeunes Professionnels de la Vigne : 2015 Trophy*



BOURGOGNES
Bureau Interprofessionnel des Vins de Bourgogne



The 2016 Vintage in the Bourgogne Wine Region: A pleasant surprise

Bourgogne, 20 November 2016

The people of the Bourgogne wine region like a story with a happy ending. The wines of the 2016 vintage have granted this wish, exhibiting a quality that was quite unexpected given the difficult start to the year. Climate events in the spring took a severe toll on the harvest, which will no doubt be among the smallest of the past two decades. Fortunately, this has not stopped producers making wines that will fully live up to the expectations of lovers of Bourgogne.

One night of frost

The night of 26-27 April 2016 will remain etched in the memory of all those who live in the Bourgogne region. It brought an historic late frost, when the first leaves had already emerged. While some areas are used to this kind of phenomenon, its territorial spread was exceptional. A few days beforehand, a violent hail storm struck the south of the wine region. And on 27 May, a further episode of hail swept the Mâconnais and the north of Bourgogne. A significant proportion of the future harvest was at risk. While everyone strived to preserve those bunches that had been spared and nurture the vines, no one could imagine how this vintage might end up.

From one extreme to another

On the summer solstice of 21 June, things turned radically around. After a particularly cold and wet spring, sun and warmth now took over. This sudden change allowed the vines to recover some strength. They made up for the lateness of the start of the growth cycle.

After an excess of water, some places were now experiencing drought, fortunately eased by some welcome rain in September, which allowed the fruit to ripen in very good conditions. This continued until the end of October, giving each plot the opportunity to be picked at the ideal moment.

The harvests began on 20 September and stretched over one month.



© BIVB / www.armellephotographe.com

In the end, a vintage of quality

The harvested grapes were in tip-top condition, ripe and delicious. Another pleasant surprise was that the vines had made the most of the summer to send out new growth, this abundant vegetation offering good prospects for the 2017 vintage.

The region's vineyards nonetheless presented two contrasting sides: Either very little or no harvest on the plots hit by hail or frost; or nice yields in those sectors that were spared.

In the course of vinification, the qualitative potential was soon confirmed, with lovely balance, which will give the wines elegance, finesse and structure, for both reds and whites. This constitutes the unexpected signature of this vintage.

In 2016, more than ever, each winemaker has left their own mark on their wines, which reflects the unfolding of this unique vintage.

White wines

Upon tasting, these wines present the tension characteristic of white Bourgognes. There's already nice substance, which should express itself fully once malolactic fermentation is complete. The aromatic palette includes white-fleshed fruit, which should become enriched during ageing.

Red wines

A deep yet dazzling red, the colors are surprisingly intense, revealing what the still-shy bouquet does not yet suggest: These are going to be wines that give pleasure. In the mouth they are fresh and soft, confirming this first impression, and underscored by nice breadth. It will take a few more months before we can discover the full personality of these wines.



© BIVB / Aurélien IBANEZ

Crémant de Bourgogne

The Crémant de Bourgogne base wines are rounded, subtle and fresh. They present the characteristics of their respective *terroirs*, with good balance built on an acidity that is present without being overpowering. The whole aromatic palette can be found in the Chardonnays, from the most mineral aromas typical of the Auxerrois region to the notes of white-fleshed fruit and white blossom that characterize the south of the appellation. The Pinot Noir provides elegant, supple wines, with aromas of cherry. The Gamay is very expressive, with a touch of acidity.

This press release only offers a general snapshot.

Because each wine and each winemaker is unique, wines need to be tasted individually before being characterized.



The weather in the Bourgogne wine region in 2016: One extreme to another

Bourgogne, 20 November 2016

A mild, rainy winter, with little sunshine

2016 began on an exceptionally mild note. January and February were notable for particularly warm temperatures, especially in the Côte-d'Or department. The variations on seasonal norms were up as much as 109% and 115% in Dijon and Beaune in January. The Saône-et-Loire presented a similar situation, up 97% in Mâcon and 65% in Rully. The Yonne saw the same trend but to a lesser degree (up 35% in Chablis and up 43% in Saint-Bris-le-Vineux). This tendency continued into February, with less marked but nonetheless remarkable variations (from up 22% in Chablis to up 63% in Beaune). Winter 2015-2016 (December-January-February) was the warmest since 1900.

This mildness was accompanied by high levels of precipitation, which varied according to sector. The Côte-d'Or was the most impacted, with a 92% increase in precipitation in January in Beaune. The Saône-et-Loire also had significantly higher-than-average rainfall, up 53% in Rully and 72% in Mâcon. The gap was less noticeable in the Yonne, especially in the Auxerrois, with only a 3% rise. In February, the Côte-d'Or continued to receive high rainfall, while the Saône-et-Loire was closer to norms, and the Yonne was now subjected to heavy rain.

As a corollary, sunlight was below norms: Down 41% in Beaune, 33% in Mâcon, and 27% in Auxerre.

A cold and very wet springtime

In the end, winter arrived three months late. In March, the thermometer dipped below seasonal norms. This drop in temperature was particularly noticeable in the Yonne, which fell to 20% below the seasonal average, whereas temperatures were only 10-15% down in the other departments.

April and May were also colder than usual, with variations of between 3% and 8% on seasonal norms. March and April started cold, but at the end of each month, temperatures were above normal. This allowed budburst to take place in early April. The stage of mid-budburst was observed in mid-April, with dates close to the 10-year average.*

Precipitation was still significantly higher, intensifying particularly in April in the Côte-d'Or and Saône-et-Loire, and in May in the north of the region. As such, increases tipped 100% for Beaune and Dijon in April, 50% in Rully, and 68% for Mâcon. The rain-gauges went crazy in Chablis in May (up 214%) and Saint-Bris (up 173%). This very wet spring continued into June, with measurements largely ahead of norms, except in Beaune, where they were in line with averages.

As with the start of the year, this exceptional rainfall was accompanied by a significant shortfall in sunshine of more than 20% in all three departments in April, May, except Mâcon, which was down 15%, and June. In June, the Yonne recorded a 40% drop in sunshine compared to seasonal norms.

**Data from the BIVB's Observatoire du Millésime*



Beyond these averages, several weather events in the spring had dramatic consequences.

A hail storm hit the Mâconnais on 13 April, damaging part of the vines. This area was then spared by the frost at the end of April, which was especially harsh on the night of 26-27 April. As budburst was coming to an end and the first leaves were visible, it struck several thousand hectares, from the Grand Auxerrois in the north to the Côte Chalonnaise in the south. The conjunction of several meteorological factors led to some particularly significant damage. The buds quickly froze due to humidity levels close to 100% and a glacial wind. The morning sun then

accentuated the burning, as the ice acted as a magnifying glass. Then on 13 May, a violent hail storm struck the Yonne. Another episode of hail on 27 May also caused some damage in the north (Chablis and Grand Auxerrois) and the Mâconnais.

The vines were heavily impacted, as was the overall potential harvest for the vintage.

All change for summer

Summer arrived right on time, with a radical change in the weather on 21 June. The rising temperatures allowed *véraison* to get underway, even though the first flowers appeared in mid-June. The warm weather triggered rapid flowering, which was nonetheless among the latest in recent years.*

From July, temperatures returned to normal, and even sometimes climbed above average. Rainfall was generally below average, in places markedly so: In Saint-Bris-le-Vineux it was 68% below norms. Sunlight hours were ahead of norms, except in the Côte-d'Or, where the shortfall persisted.

The summer conditions accentuated in August. Although average temperatures were only slightly above normal, precipitation was scarce, with shortfalls of between 31-71%. Sunshine was much higher than normal in all three departments: Around 24% up in the Yonne and Côte-d'Or, and almost 29% up in Saône-et-Loire.

The trend continued in September, which was very warm.

The thermometer showed figures around 10% higher across the Bourgogne wine region. The Côte-d'Or and Saône-et-Loire still showed a shortfall in rain, whereas the Yonne received more precipitation than normal (up 18-31%). There was still lots of sun, 15% more than seasonal norms in the Yonne, 19% up in the Côte-d'Or, and 24% ahead in the Saône-et-Loire.

The clement weather ensured that ripening took place in optimal conditions. Harvesting began on 20 September and spread over several weeks, thanks to a lovely Indian summer which lasted until the end of October.

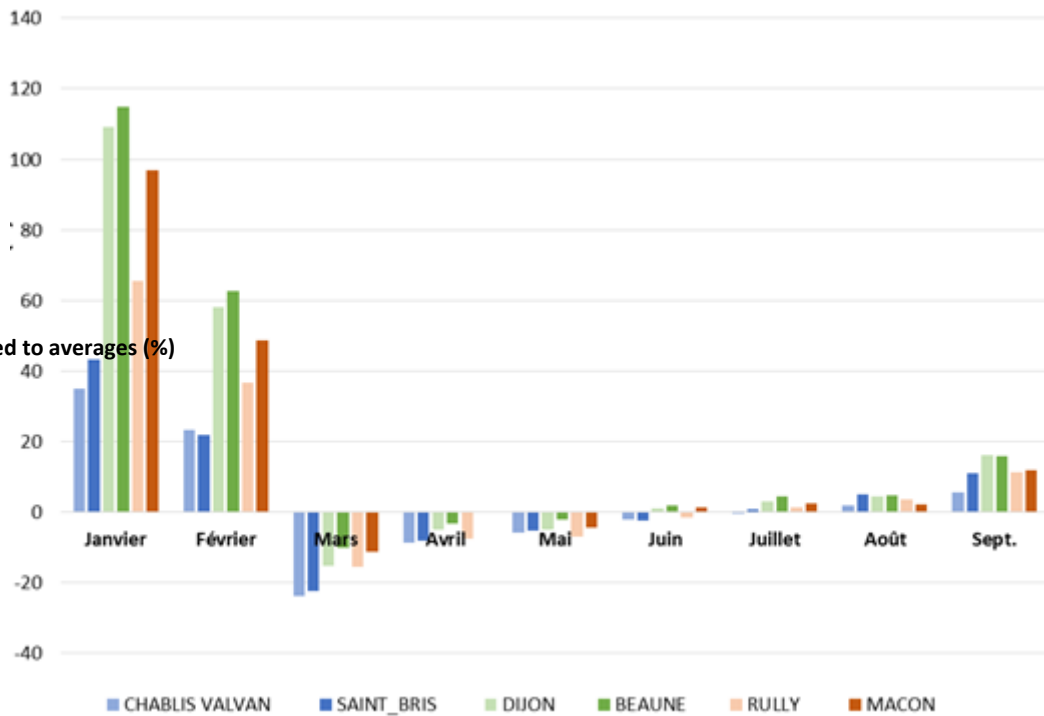
In 2016, there were no half-measures when it came to the weather! It took in all extremes and set record temperatures (for the heat in summer, mildness in winter, and cold in spring), with extremes of rainfall (in excess in the first half, drought in summer) and record sunshine hours. Although the campaign ended on a positive note with good quality fruit, 2016 will go down as a year that tested the winemakers of the Bourgogne region to the limit.

*Data from the BIVB's Observatoire du Millésime

Average monthly temperatures - Bourgogne 2016
Variation on seasonal norm (%) by department



Difference compared to averages (%)



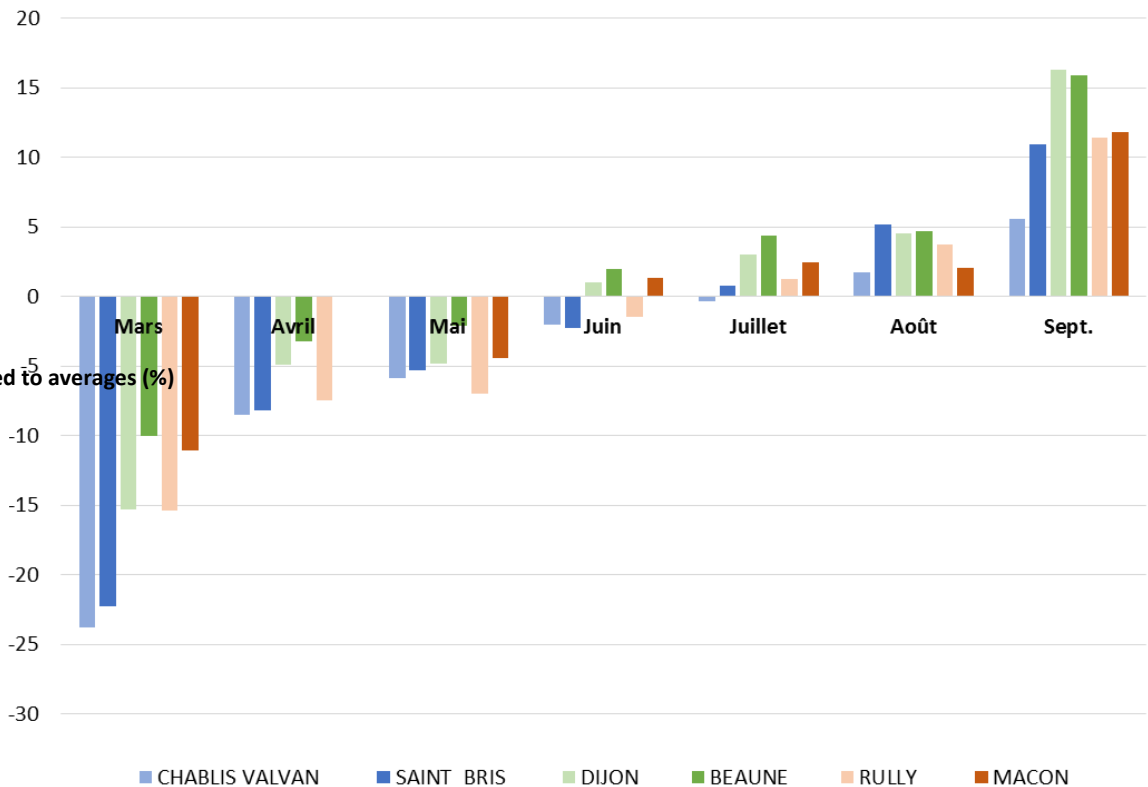
Source : Météo France

Average monthly temperatures – Bourgogne 2016

Variation on seasonal norm (%) by department - excluding the first two months of the year



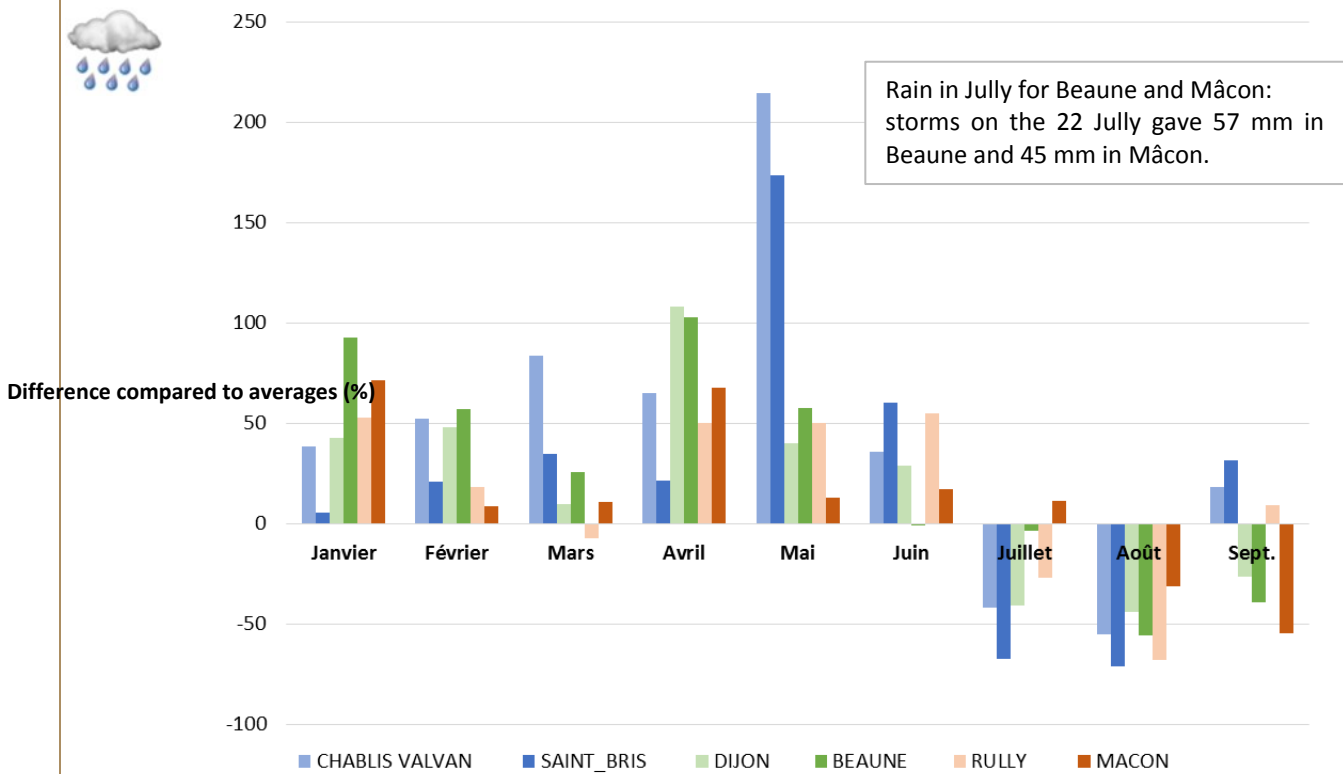
Difference compared to averages (%)



Source : Météo France

Average monthly precipitations – Bourgogne 2016

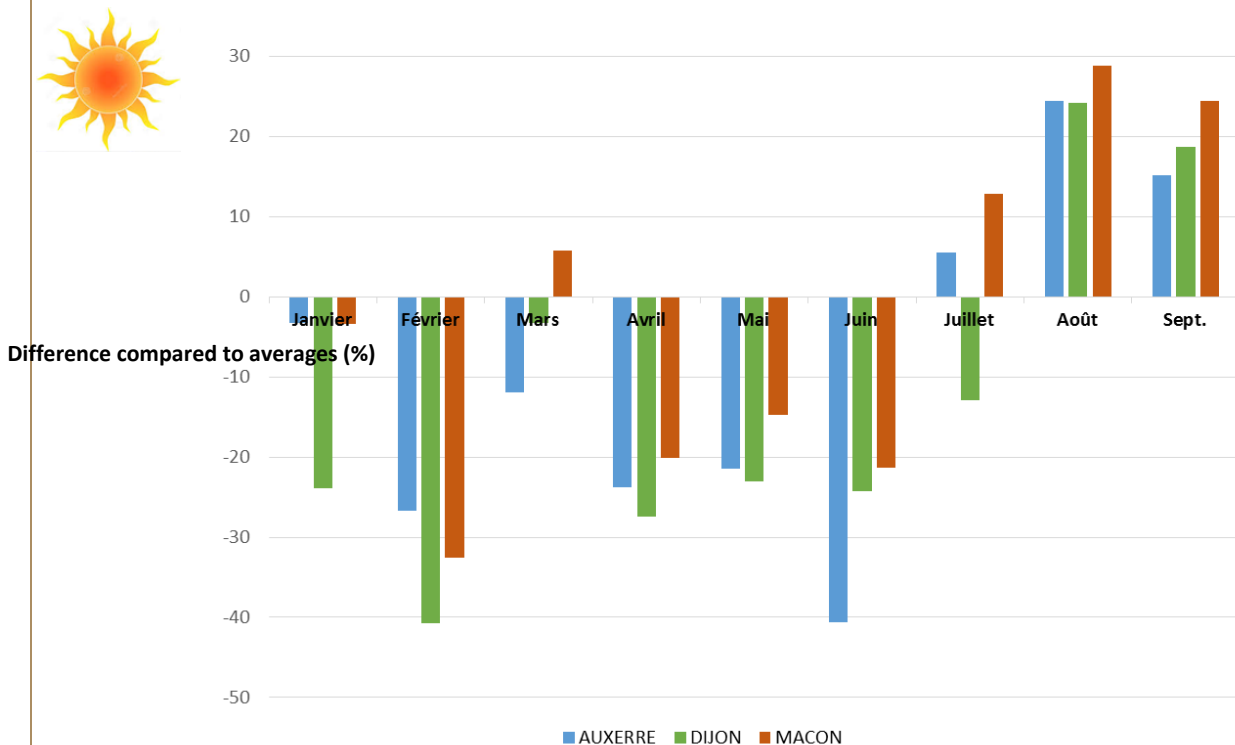
Variation on seasonal norm (%) by department



Source : Météo France

Average monthly sunshine – Bourgogne 2016

Variation on seasonal norm (%) by department



Source : Météo France



BOURGOGNES
Bureau Interprofessionnel des Vins de Bourgogne



The 2015 Vintage: Simply Sublime!

Bourgogne, 20 November 2016

In 2015, the grapes were just perfect. The fruit was in impeccable condition and at optimal ripeness; the winning duo. One year after the harvests, tasting confirms what everyone anticipated: The generous wines from this sunny vintage will be noteworthy.

Things went very fast in 2015, both in the vineyards and the winery. Flowering took place in early June, followed by *véraison* in mid-July, with the start of harvesting at the end of August. The weather dictated the tempo. Winemakers had to adapt to this sustained pace and these unusual conditions, which resulted in some magnificent grapes, the foundation of a great vintage

In terms of volumes, certain appellations did not reach their maximum, particularly for the reds. The overall harvest totaled 1.518 million hectoliters, up 7% on the average over the last five years.



© BIVB / Sébastien NARBEBURU

White Wines

Chablis and Grand Auxerrois

In Chablis and the Grand Auxerrois, the wines have great aromatic quality. They express pleasant notes of ripe fruit and citrus, and show a lovely suppleness whilst retaining sufficient crispness.

The 2015 vintage is superb and can be drunk young, while the Chablis *Premier Cru* and *Grand Cru* will benefit from lengthy ageing.

Côte de Beaune

Richness and concentration are the watchwords of this vintage. The nose typical exhibits intense floral and fruity notes. Upon aeration, they also reveal notes of nuts and spices. They are full and generous in the mouth, with impressive body and length.

Here again, 2015 is without doubt an admirable vintage.

Côte Chalonnaise

The wines are rich and dense, with wonderful aromas of ripe fruit and nuts. They are opulent and perfectly balanced in the mouth.

They can already be enjoyed, but these wines also have good ageing potential.

Mâconnais

2015 is a magnificent vintage, offering well-structured wines with great aromatic depth. They are both broad and powerful, without losing any of the elegance which characterizes them.

Red wines

Grand Auxerrois

These wines are fleshy and smooth, with nicely rounded tannins. They are indulgent wines that can be served young. A very fine vintage.

Côte de Nuits

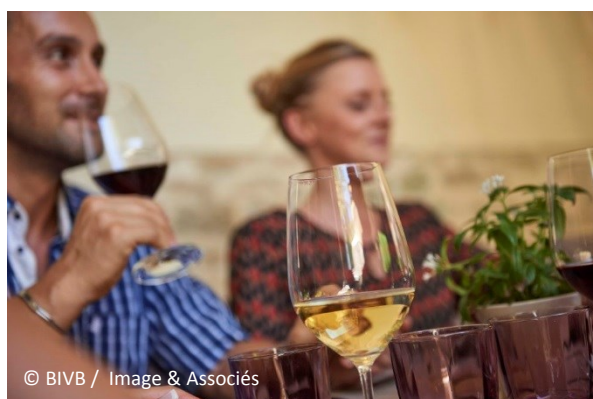
The wines are deeply colored and offer an unusual aromatic palette of well-ripe red and black fruit, overlaid with delicate floral notes and subtle aromas of spice and nuts. The mouth is balanced, full, and with great smoothness. Their rounded and silky tannins underscore the deliciousness of the 2015 vintage, which is undoubtedly one of great class.

Côte de Beaune

The wines are showing spectacular aromatic expression. Fragrances of berries mingle with those of ripe fruit and spices. The tempered acidity and softness of the tannins give the wines a pleasant roundedness and ensure a very nice finish. Another superb vintage!

Côte Chalonnaise

The nose is dazzling, dominated by intense notes red berries and spices. In the mouth, the wine is structured, full-bodied, and perfectly balanced. The tannins provide a remarkable framework, whilst remaining very silky. This is a vintage of exceptional quality with strong ageing potential.



This press release only offers a general snapshot.

Because each wine and each winemaker is unique, wines need to be tasted individually before being characterized.



Bourgogne wines regaining share in some markets

Bourgogne, 20 November 2016



© BIVB / Image&Associés

The total 2015 harvest in the Bourgogne wine region was up 7% on the five-year average, which helped to consolidate the overall stock of available wine for the second year running. This is now equivalent to the average over the last five campaigns. It does, however, remain below the average of the last 10 campaigns. The supply of available wine with producers has relaunched certain markets, which had slowed down in recent years due to lack of volume.

The area under production is growing steadily - up by around 1% per year - but yields have been adversely affected by climate events and mortality in the vines. This dual phenomenon has impacted the 2016 vintage and will once again put a brake on volumes leaving estates, especially for the hardest hit areas. On the other hand, the appellations that were unaffected have gained market share in foreign markets (United States, United Kingdom, Canada), and on French distribution circuits.

The Bourgogne wine sector has climbed back above the critical threshold of eight months' stock on estates. Initial estimates are close to 10 months of stock for the 2015-2016 campaign. One should nonetheless remain prudent, since the Bourgogne region is once again having to deal with a total harvest below the five-year average.

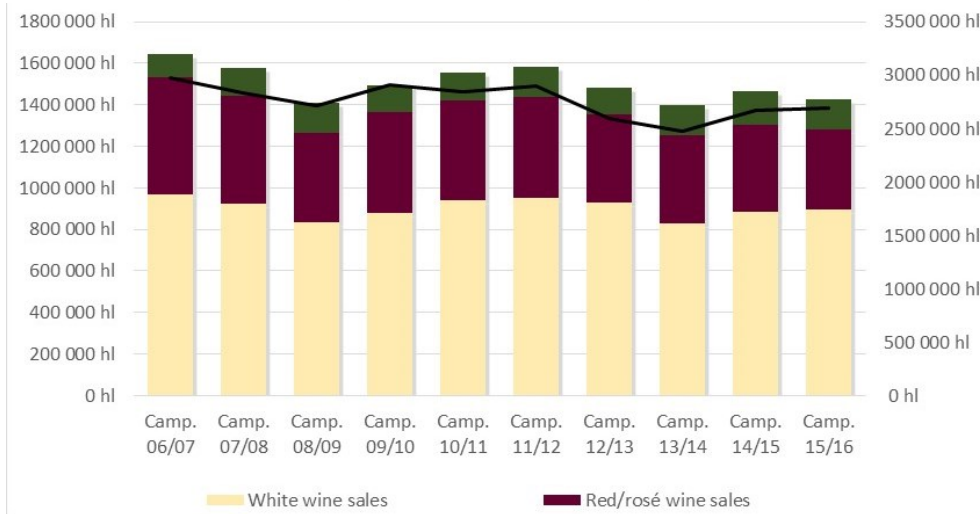
An active advance trade market for certain appellations

The increase in available wine as a result of the 2014 and 2015 vintages allowed the market for *Régionale* AOC to pick up. However, disparities in production prevented certain appellations from benefitting from this dynamic.

Wine leaving estates for the campaign (1 August 2015 - 31 July 2016)

Bourgogne white wines were stable (up 1%), whereas red and rosés wines continued to slide, and were down 7% (a 12% drop on the average over the past five campaigns), as was Crémant de Bourgogne (down 9%). Among the major areas for the production of white wines, the *Régionale* Bourgogne and the *Régionale* Mâcon appellations benefited most from the upturn (up 5.2% and 3.5% by volume respectively), along with the Chablis and Petit Chablis appellations, which grew by 5.2%. This good performance involved both sales in bottle and bulk sales.

**Sales from the property and available wine
at the start of the campaign in the Bourgogne region**
(Sources : Customs / BIVB)



For this group of appellations, for which available wine with producers allowed sustained growth, transactions between winemakers and *négociants* accounted for 62% of white wine sales by volume (40% of total transactions) and grew by 3.3% (2015/16 campaign over 2014/15).

This was not the case for all Bourgogne appellations, for which the total volume of transactions fell by 5%.

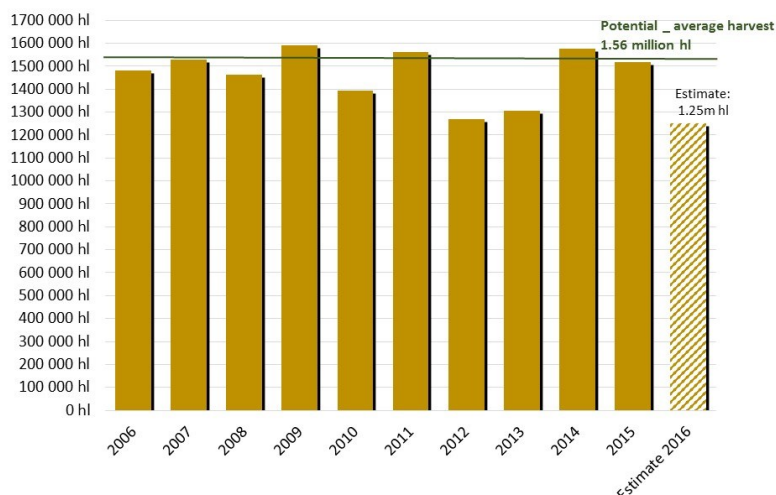
The volume of inter-trade deals for the 2015 vintage accounted for 91% of the volume of transactions for this campaign (719,550hl), and remained 3% higher than the average over the last five campaigns.

Despite good volumes in 2015, available wine on estates at the start of the 2015-2016 campaign (stock as of July 2015, plus 2015 harvest) only increased very slightly (up 1% over the 2014-2015 campaign). It was stable compared to the average over the last five campaigns, but down 3% on the 10-year average.

In recent years, the Bourgogne wine trade has drawn greatly on its reserves to avoid a rupture in supply.

The arrival of the 2016 vintage, estimated at 1.25 million hectoliters, is down 20% on the five-year potential average (1.56 million hectoliters, *see graph below*). This will inevitably have an impact on available wine in the months to come. The consequences can already be seen in the volume of transactions at the start of the campaign 2016-2017, which were down 11.4% over the first three months from August to October 2016.

Total annual harvest for Bourgogne wines *(sources: Customs/CAVB/BIVB)*



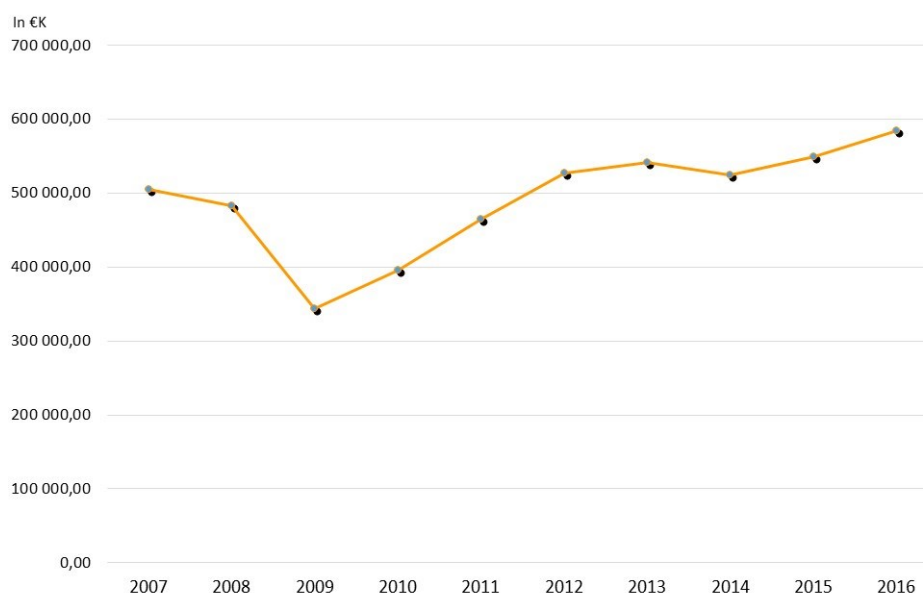
Export: the trend for recovery confirmed in some markets

The available stock resulting from the two previous harvests and the pressure of demand in some markets has allowed Bourgogne wines to maintain steady growth in exports (up 2.8% by volume and 6.4% in terms of revenue in the first nine months of 2016). Those in the Bourgogne wine sector remain prudent, in anticipation of annual production this year below the rolling five-year average, and quite possibly the lowest in the last 10 years.

Overall revenue continued to grow, with an increase of 35 million euros (up 6.4%) over the first three quarters of 2016 (585 million euros). Some 53% of this revenue came from white wines, 43% from red wines, and 4% from Crémant de Bourgogne.

Export of Bourgogne - 9 first month of 2016

(Sources: Customs / BIVB)



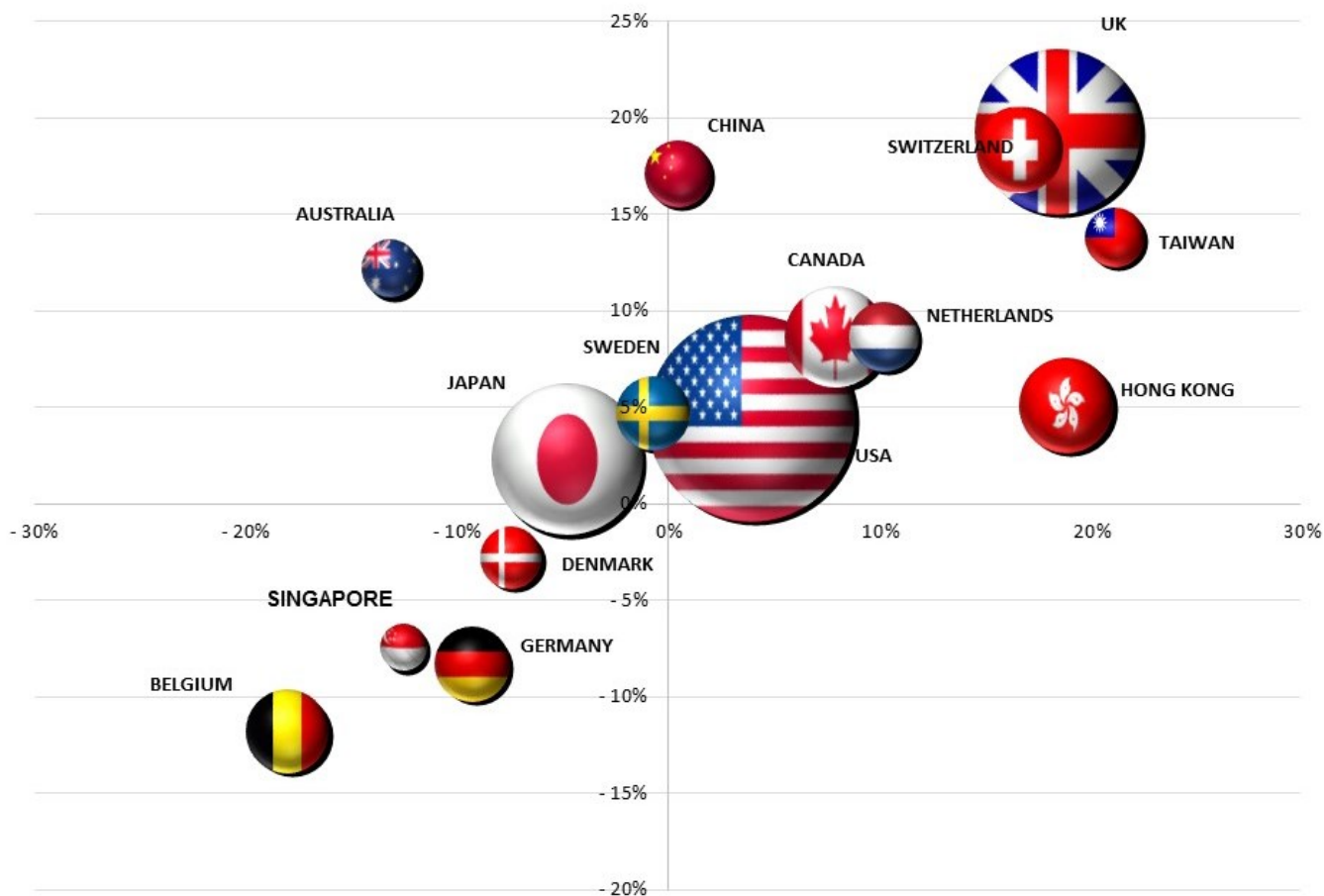
The main markets of North America, Europe (United Kingdom, Sweden and Switzerland), and Hong Kong all showed good results, both in terms of revenue and volume, over the first nine months of 2016.

- ▶ The United States and Canada continued to show an increase in imports of most Bourgogne appellations.
- ▶ The United Kingdom, Switzerland, and Sweden all returned to growth after two years of decline.

Exports of Bourgogne wines continued to struggle on other European markets, especially Germany (down 9.3% by volume over the first nine months of 2016) and Belgium (down 18% for the first nine months of 2016). These two countries reduced their overall wine imports, which fell respectively by 8.3% and 11.8% over the period.

Change in exports of Bourgogne Wines

Total for nine months 2016 – source : Douane / BIVB)



How to read the graph:

The size of the bubble is proportional to the value of the market by revenue for Bourgogne wines over the period

- Horizontal axis: Change in volume compared to the same period in 2015
- Vertical axis: Change in revenue compared to the same period in 2015

Confirmed growth in North America

Exports of Bourgogne wines to North America continued to increase by volume (up 5% over the first nine months of 2016), after suffering from a lack of available stock in 2013 and 2014. This growth was accompanied by another rise in revenue (up 5.2%), an increase of 5 million euros.

In 2014, the United States (1st Market in volume) became the leading market by volume for Bourgogne wine, whilst confirming its top ranking in terms of revenue. This strong performance was driven by a favorable euro/dollar exchange rate.



With growth of 4% by volume, the healthy sales of Bourgogne wines on the US market were confirmed over the first nine months of 2016. The United States accounted for 21% of Bourgogne wine exports by volume, and 24% of export revenue (up 4.4% in the first nine months of 2016 over the same period in 2015).

The Chablis appellations benefited most from this return to growth, with increased sales of 364,550 bottles. Over the first three quarters, sales of *Village AOCs* of the Mâconnais grew by 9% in both volume and revenue. The *Village* and *Premier Cru* red appellations from the Côte de Beaune, Côte de Nuits and Côte Chalonnaise also enjoyed healthy growth, up 7.4% by volume and 12.4% in terms of revenue.

Sales of Bourgogne wines to Canada (4th market in volume) were also buoyant. During the first nine months of 2016, export volumes grew by 7.9%, after a fall of 13% in 2014. Revenue was also up by 8.6%. The white *Régionale* Bourgogne appellations surpassed their record set in 2012 by 17.8% in terms of volume and 28.5% in terms of revenue, with almost 1.5 million bottles shipped and 7.8 million euros in revenue over the first nine months of 2016.



The second group of most-exported appellations was Chablis and Petit Chablis, which have seen continuous growth for more than a decade, going from 424,080 bottles (first nine months 2005) to nearly 811,560 bottles exported over the same period in 2016.

The United Kingdom picks up again (2nd market in volume)

Exports of Bourgogne wines to the United Kingdom grew 18.5% by volume for the first nine months of 2016, while total imports of all French wines to this market fell (down 6%, source: GTI, first eight months of 2016).



Revenue from Bourgogne wines also increased 19.3% for the first nine months of 2016, thanks to this rise in volume.

White appellations were driving this rise, notably *Régionale AOC Mâcon* white (up 31.9% by volume and 34.7% in terms of revenue), *Régionale AOC Bourgogne* white (up 20.5% and 24.2%), and Chablis and Petit Chablis (up 16% and 15.7%). Bourgogne white wines have always accounted for a large part of exports to the United Kingdom (85% of export volumes), despite the fact that this country as a whole imports a large majority of red wines.

Switzerland, recovery in a historical market (10th market in volume)

Figures for the first nine months of 2016 showed a recovery in Bourgogne wines sales on this market, up 16.7% by volume and 18.4% in terms of revenue (up 167,710 bottles for an increase of 3.8 million euros).



This return to growth is partly due to an overall increase in wine consumption in Switzerland, which rose to 264 million liters in 2015 (source: OFAG).

The Hong Kong wine market still booming (14th market in volume)

Over the first nine months of 2016, overall revenue from Bourgogne wines in the three main Asian markets - Japan, China and Hong Kong - continued to grow, increasing 4.6%. This performance was above all driven by the Hong Kong market.



Hong Kong confirmed its upward trend, with a 5.1% rise in terms of revenue and 19% by volume, after a brief hiatus in 2014 due to the lack of available Bourgogne wine. Unlike the first nine months of 2015, as was often the case in the more mature markets, this market turned away from the *Grand Cru* in favor of *Régionale* Bourgogne appellations, both white and red (up 129,100 bottles for the first nine months of 2016). The *Village* and *Premier Cru* red appellations from the Côte de Beaune and Côte de Nuits continued to grow (up 31.5% by volume and 9.4% in terms of revenue).

Having rapidly recovered in the wake of the 2008 crash, Hong Kong's economy is one of the most dynamic in the world (seventh, according to World Economic Forum; in first place according to the Index of Economic Freedom 2016 of the Heritage Foundation for the 22nd consecutive year; fifth according to the World Bank Doing Business ranking).

China finds stability (11th market in volume)

Exports of Bourgogne wines to China alternate between phases of growth and decline. As such, after a period of decline in 2015 (down 8.7% over the full year), exports stabilized with a 0.5% increase by volume over the first nine months of 2016. Nonetheless, the underlying trend for this country is one of constant progression, with revenue going from 1 million euros in the first nine months of 2007 to 14 million euros in the same period of 2016. The *Régionale Bourgogne AOCs* accounted for the bulk of this growth, with a 34.6% increase in sales by volume.



The Bourgogne wine industry wants to protect its 100 AOCs in China

While the Chinese market still remains modest for Bourgogne wine exports (in 2015, it was the 11th biggest market by volume and 12th biggest in terms of revenue), it shows great potential. One of the difficulties in China lies in the problem of usurpation of appellations. Certain Chinese companies attempt to register variations on the names of our AOCs as brand names. This requires constant attention to oppose such efforts, at the risk of no longer being able to use our AOC names, or else seeing our notoriety effectively plundered.

From this perspective, the Bourgogne wine industry has decided to protect its 100 AOCs. It is concentrating on recognition of their Geographical Indication by the Chinese equivalent of the INAO (AQSIQ, Chinese Administration of Supervision of Quality, Inspection and Quarantine). Certain AOCs will also be recognized as a collective brand. This dossier is still at an early stage, but a meeting is already scheduled for January with the Ministry of Agriculture in Paris. In parallel, discussions are underway with the Chinese law firm which handled the Champagne and Bordeaux appellations.

In Japan, *Régionale* appellations fetching higher prices (3rd market in volume)

In the first nine months of 2016, revenue from Bourgogne wines in Japan rose by 2.3%, although export volumes continued to fall (down 4.8%). Bourgogne white wines sold for good prices, and progressed in terms of revenue by 8.8%, while by volume they dipped fractionally (0.1%). Bourgogne red wines saw the biggest drops on this market (down 12.6% by volume and 3% in terms of revenue), after three years of stability.



Several factors explain this fall: The lack of available wine, competition from other wines benefiting from free-trade agreements, an exchange rate less favorable for exports, and an overall fall in wine imports to Japan (down 3.4% over the first eight months of 2016, *source: GTI*).

Germany (8th market in volume) and Belgium (5th market in volume) still flagging

In the first nine months of 2016, the overall volume of Bourgogne wine sold on these two neighboring markets continued to fall, and was down 14.8%. Revenue was also down 10.3%. The same applied to volumes of wine from other provenance imported by these two countries.

Revenue from Bourgogne wines in Germany was impacted by the continual fall in volumes exported there since 2014. In the first nine months of 2016, revenue slid 8.3% with a dip in volume of 9.3%.

In this gloomy context, *Régionale* Bourgogne white appellations continued to grow, with volumes up 21% and revenue climbing 20%. Crémant de Bourgogne also maintained dynamic sales in this market, up 9.6% by volume and 11% in terms of revenue.



Several factors explain this sluggishness: An overall drop in wine imports to Germany (down 5.8% in the first eight months of 2016, *source: GTI*), a renewed appetite for local wines, and an overall drop in the number of wine buyers in Germany (down 0.8% from 2014 to 2015, and down 2.8% from 2015 to 2016), combined with the ageing population of wine buyers (more than half of buyers are 60+).

The volume of Bourgogne wines exported to Belgium has been falling since 2013. In the first nine months of 2016, volumes shipped fell 18% (down 11.8% in terms of revenue). This applied to all appellations.

These figures should however be treated with some caution, because there is an unknown factor: The volume of wine taken home by Belgian tourists, given that Belgians account for 86% of the foreign clientele when it comes to wine sales direct from the estate.



Table of export figures for Bourgogne wines

(Total for first nine months of 2016 - Source: BIVB/Customs)

Destination country	In thousands of 75cl bottles			in €K		
	Total for first 9 months of 2016	Total for first 9 months of 2015	Variation in volume year on year	Total for first 9 months of 2016	Total for first 9 months of 2015	Variation in volume year on year
Total	58 455,86	56 858,12	2,8%	585 140,36	549 984,75	6,4%
USA	12 248,41	11 781,64	4,0%	141 279,64	135 283,18	4,4%
UK	11 186,20	9 439,58	18,5%	90 429,74	75 813,16	19,3%
JAPAN	5 882,32	6 176,95	-4,8%	74 988,68	73 303,71	2,3%
CANADA	4 696,25	4 350,53	7,9%	33 816,92	31 127,44	8,6%
BELGIUM	3 848,62	4 694,06	-18,0%	22 428,62	25 433,03	-11,8%
SWEDEN	3 183,55	3 205,34	-0,7%	17 464,34	16 683,14	4,7%
NETHERLANDS	2 566,60	2 327,65	10,3%	15 439,72	14 210,39	8,7%
GERMANY	2 457,10	2 707,61	-9,3%	17 899,40	19 524,47	-8,3%
DENMARK	1 530,23	1 652,77	-7,4%	12 168,42	12 520,16	-2,8%
SWITZERLAND	1 172,45	1 004,74	16,7%	24 465,61	20 671,89	18,4%
CHINA	1 100,77	1 095,43	0,5%	14 349,46	12 252,85	17,1%
NORWAY	1 054,22	948,99	11,1%	6 943,19	5 990,57	15,9%
AUSTRALIA	902,51	1 039,03	-13,1%	10 702,61	9 541,20	12,2%
HONG KONG	831,99	699,68	18,9%	29 413,31	27 987,27	5,1%
IRELAND	417,49	473,45	-11,8%	2 355,09	2 884,47	-18,4%
ITALY	405,56	370,03	9,6%	4 958,30	4 288,70	15,6%
UNITED ARAB EMIRATES	405,10	393,05	3,1%	5 523,96	4 852,60	13,8%
TAIWAN	381,22	314,54	21,2%	11 395,60	10 013,27	13,8%
SINGAPORE	317,02	362,40	-12,5%	7 089,30	7 659,34	-7,4%
SOUTH KOREA	272,34	329,28	-17,3%	4 622,53	4 527,57	2,1%
BRAZIL	245,65	279,06	-12,0%	1 690,19	1 919,81	-12,0%
SPAIN	220,56	202,29	9,0%	2 550,99	2 088,65	22,1%
ISRAEL	202,70	143,21	41,5%	1 921,84	1 381,28	39,1%
MEXICO	182,84	137,69	32,8%	1 584,19	1 145,24	38,3%
LATVIA	182,56	152,15	20,0%	1 463,86	1 068,29	37,0%
FINLAND	174,30	188,53	-7,5%	1 076,60	1 141,66	-5,7%
LUXEMBOURG	174,29	174,58	-0,2%	2 539,20	2 281,04	11,3%
RUSSIA	150,43	117,82	27,7%	1 941,40	1 352,08	43,6%
THAILAND	149,56	147,51	1,4%	1 836,32	2 316,56	-20,7%
POLAND	138,82	134,53	3,2%	1 013,49	1 035,16	-2,1%
LITHUANIA	125,96	118,37	6,4%	914,61	1 054,85	-13,3%
CZECH REPUBLIC	110,85	99,21	11,7%	1 113,67	1 130,88	-1,5%
NEW ZEALAND	105,10	73,84	42,3%	1 152,67	995,83	15,7%
NEW CALEDONIA	96,76	90,53	6,9%	547,29	617,25	-11,3%
AUSTRIA	86,20	98,77	-12,7%	1 455,22	1 524,45	-4,5%

France: Bourgogne wines retain strong presence on traditional circuits

Bourgogne wines continue to grow on traditional circuits

Restaurant trade: 2015 was a better year for Bourgogne wines than 2014, according to the findings of an annual survey carried out among 2,000 establishments on the restaurant and brasserie circuit. The region's wines were present in 64.2% of establishments surveyed (the most since 2008), and this rose to more than 80% in the northeastern quadrant of France (source: CHD Expert).

However, the average offer per establishment was at its lowest since 2010, with the average number of Bourgogne wine references dropping from 7.8 to 6.6 per point of sale. The most reputed red appellations were the least represented. Chablis remains the most widely available AOC, present in 27.7% of establishments, ahead of Bourgogne Aligoté (19%) and Mercurey red (15.5%).

Restaurateurs were more positive than in 2014 concerning sales of Bourgogne wines: Some 31% reported them to have fallen (compared to 43% in 2014), whereas 16% said they thought sales had grown (10% in 2014). A growing number of restaurants now offer Bourgogne wines by the glass (39% in 2015, up 1 point).

Specialist wine stores: According to a sample of 600 wine specialists, the average number of Bourgogne wine references per store is 58, with 1,817 bottles sold per year (31 bottles on average per reference). By projecting this to the 5,000 or so French specialist stores, this circuit accounts for sales of around 9 million bottles of Bourgogne wines annually, or around 5% of total sales.

Specialists wine stores in the center-east area, which is home to the Bourgogne region, naturally tend to stock more Bourgogne wines (82 on average), and sell the most, at around 3,581 bottles per year. The average retail price of Bourgogne wine is highest in the south of France, just ahead of the Paris region.



© BIVB / Image&Associés

Among the appellations that wine specialists most like to introduce to their clientele, Mercurey is a clear leader (20% of respondents), followed by Givry, Pommard, Santenay, and Marsannay. These are mainly mid-range red wines.

Retail circuit gains ground thanks to greater availability

During the first eight months of 2016, sales of Bourgogne wines in the French supermarket sector increased 5.4% by volume, an additional 139,000 bottles on the previous period, and were up 6% in terms of revenue. Some 14 million bottles were sold in this sector (excluding click-and-collect, hard discount and convenience stores), for record revenue of 107.4 million euros.

While the low harvests in 2012-2013 resulted in the sharp drop seen in 2014, the more generous harvests of 2014 and 2015 seem to have replenished this market in recent months, mainly for the AOCs with a faster turnaround.

Bourgogne red wine sales grew 4.7% by volume, driven by Coteaux Bourguignons wines, for which sales more than doubled in one year. Mercurey was up 2.5% and remains the top-selling red *Village* appellation.

White wines climbed 6% by volume, thanks notably to Bourgogne Aligoté (up 12.2%) and the wines of Chablis (up 14.7%). The other AOCs were mainly down.

While overall wine sales on the supermarket sector are continuing to fall, Bourgogne and Beaujolais are the only AOCs showing significant growth, thanks to small increases in average retail prices. All French AOCs taken together lost sales equivalent to 7.3 million bottles.

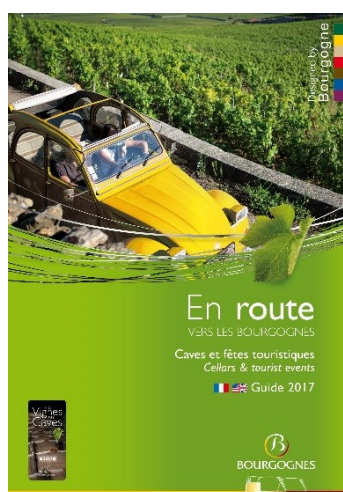
This economic report was produced by the BIVB Markets and Development Department - November 2016

(Sources: Customs, Businessfrance, GTI, MIBD Market, IRI, CHD Expert, BIVB)



The essential guide to wine tourism En Route vers les Bourgognes

Bourgogne, 20 novembre 2016



The Bourgogne Wine Board (BIVB) has been committed to wine tourism for more than 25 years, through two essential tools to guide visitors: The De Vignes en Caves welcome charter, created in 1991, and the guide book *En Route vers les Bourgognes*. These tools, underpinned by an in-depth database rich in information, are available on our website www.bourgogne-wines.com in the *A Trip Through the Vines* section.

En Route vers les Bourgognes reveals the quality and diversity of the wine-related tourism on offer in the region. It facilitates searches to help you organize your trip to the Bourgogne winegrowing region with a tailor-made program via the six tourism trails that criss-cross the vineyards.

The guide also lists all the local wine-related events throughout the year that will allow you to discover the 100 AOCs that make up the Bourgogne winegrowing region.

The 2017 guide in figures

- ▶ **346 estates, *maisons*, and cooperative cellars that have signed up to the De Vignes en Caves* welcome charter, and all the information you need**, including contact details, languages spoken, opening hours, price category, what accommodation or refreshments are available, and the style of vine cultivation used
- ▶ **98 wine-related events** that take place around the year in the Bourgogne winegrowing region, listed in a two-page planner at the end of the guide, with color codes to indicate the season.
- ▶ **1 map of the Bourgogne winegrowing region** showing all of its must-visit sites. The map was designed in conjunction with Bourgogne Tourisme and on the back, offers mini maps of each wine trail.
- ▶ **75,000 copies printed annually.**
- ▶ **917 distribution points across the Bourgogne, Rhône-Alpes, and Jura regions.** The guide can be found in tourist offices, regional and departmental tourist bureaus, hotels, campsites, *gîtes*, motorway information areas, and the airports and railway stations in Lyon.



And as always...

- ▶ The guide is published in English and French
- ▶ It's free and available on request from the BIVB and other tourism bodies
- ▶ You can download it from www.bourgogne-wines.com in the *A Trip Through the Vines* section
- ▶ It contains lots of valuable information, such as an introduction to the wines, vineyards, appellations, varietals, *Climats*, the De Vignes en Caves charter, the Vignobles et Découvertes label, and much more.
- ▶ Regions are color-coded to help you find the producer, event, or wine trail you're looking for.
- ▶ It also contains some helpful diagrams presenting key figures about the Bourgogne winegrowing region at the end of the guide

A prestigious label for the Châtillonnais winegrowing region



The nationwide Vignobles & Découvertes label was created in 2009 to encourage local wine-related tourism providers to form a network. This makes it easier for visitors to identify what's on offer as they travel the wine trails of France. The label is attributed by the ministries for tourism and agriculture, and is awarded for a period of three years.

Seven destinations in the Bourgogne winegrowing region have been awarded the Vignobles & Découvertes label, bringing together more than 640 different tourism offers including 166 cellars. Of these seven, four** have already seen their label renewed for a further three-year period:

- ▶ Beaune, from Corton to Montrachet **
- ▶ Dijon Côte de Nuits**
- ▶ The Vineyards of Chablis **
- ▶ The Vineyards of the Auxerrois**
- ▶ The Vineyards of the Mâconnais
- ▶ The Côte Chalonnaise
- ▶ The Vineyards of the Châtillonnais

July 2016: The Vineyards of the Châtillonnais obtain the Vignobles & Découvertes label

The application for the label, supported by Côte-d'Or Tourisme and the BIVB, illustrates the region's ambition with regard to its winemaking. The attribution of this label underlines the winemakers' unique expertise, and the beauty of the local landscapes, which together offer a wonderful opportunity for growth. The label ensures strong visibility on a national and international level, and allows those service providers who sport the badge to work together within a single network and with the same goal: To guarantee the quality of the welcome in the Châtillonnais winegrowing area.

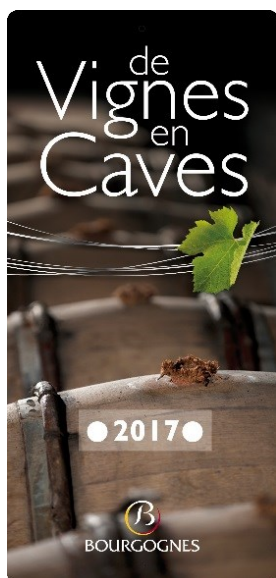
The Vineyards of the Châtillonnais in figures:

- ▶ 1 wine-tourism destination, 8 cellars
- ▶ 44 communes, 10 offers of accommodation
- ▶ 5 restaurants, 4 heritage sites
- ▶ 1 tourist office, 1 reception space
- ▶ 3 leisure activities, 3 events

A 25-year commitment to wine tourism

The De Vignes en Caves charter was created some 25 years ago by the BIVB, to encourage its members to continually improve the welcome and tastings they offer in their cellars.

Adherents commit to:



- ▶ Providing a warm and individual reception (in languages other than French).
- ▶ Advertising fixed opening hours for visitors.
- ▶ Clearly displaying the sign indicating their commitment to the charter.
- ▶ Offering free tasting of at least one wine and displaying a price list where tasting a range of wines will be charged for.
- ▶ Displaying a list of the appellations on sale.
- ▶ Offering take-away wine sales (with a minimum purchase of three bottles) and a shipping service for 12 bottles or more.
- ▶ Supplying information about the Bourgogne winegrowing region and the estate.

As part of our green approach, the De Vignes en Caves plaque for adherents to display at the entrance to their estate is reusable. They simply need to change the year when their subscription is renewed.



BOURGOGNES
Bureau Interprofessionnel des Vins de Bourgogne



Take flight with the short film, *The Vineyards of Bourgogne, Seen from the Sky*

Bourgogne, 20 November 2016

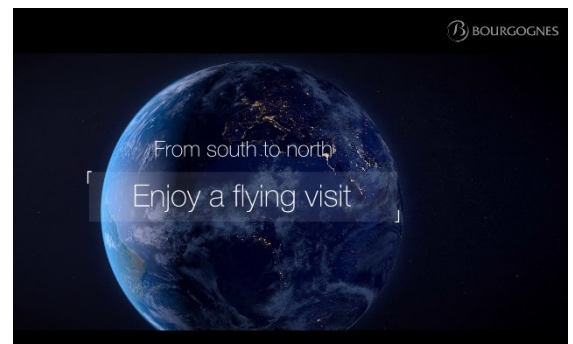
The Bourgogne Wine Board (BIVB) has released a new short film, "The Vineyards of Bourgogne, Seen from the Sky". It's an invitation to fly over the sublime landscapes of the Bourgogne winegrowing region, from Mâcon to Chablis. In both English and in French, the film offers a new way to understand the region, its geography, its history, and its appellations. Lasting some 13 minutes, the film features some brand new aerial footage, animated maps, key information and amazing shots of emblematic sites. It will take you on a fascinating journey across the Bourgogne region from a very different angle.

Almost five hours of footage was shot by Bourgogne Live Production to make this short film, co-written by the BIVB and Jean-Pierre Renard, Official Bourgogne Wine Instructor.

The entire Bourgogne region, from Mâcon to Chablis, was covered by helicopter and filmed using a Cineflex® camera. The Mâconnais, the Côte Chalonnaise, the Côte de Beaune, the Côte de Nuits, the Hautes Côtes, the Grand Auxerrois, the Chablisien and the Châtillonnais were all explored in detail and captured on film.

The BIVB's aim was to describe the Bourgogne region in its environment, zone by zone, to show the diversity of the landscape, the patchwork of Climats, its history, and everything that makes it unique.

Although the Bourgogne is a whole, the winegrowing regions that make it up each have slightly different profiles, their plots positioned in the best locations, profiting from everything nature has to offer. These aerial images make one realize that although the *terroir* is essential, the imprint of winegrowing in the Bourgogne territory is as visible in the countryside as it is in the towns.



The valleys and plains, the vines and prairies, the forests and water courses – everything is clearly marked out.

The soil type, the aspect, the varietal, the prevailing winds, even the work of the monks – this short film is a veritable mine of information.

The film is accessible to everyone, and is also available to Bourgogne wine producers for their own use. It may also be screened during the many training sessions organized by the BIVB or the École des Vins de Bourgogne.

Check out the film right now on the home page of the BIVB website at www.bourgogne-wines.com, or on our dedicated YouTube channel, *Vins de Bourgogne BIVB*.

The CEnovidéo trophy for Best Industry Wine Film 2016 was awarded to “The Chablis winegrowing region seen from the sky”

“The Chablis winegrowing region seen from the sky”, created just one year ago by the BIVB, won a trophy at the 23rd edition of the International CEnovidéo Festival on 29 May 2016.

This film, shot by Bourgogne Live Production using a Cineflex® camera on the nose of a helicopter, was created to fulfil the BIVB’s desire to illustrate the richness, elegance, and diversity of the Chablis region in an educational way and in the space of just a few minutes.

Just like the new film of the Bourgogne region, “The Chablis winegrowing region seen from the sky” is accessible to all, and can be viewed on [the BIVB’s YouTube channel](#).



The BIVB is also in the running for two further prizes with this video: From the Vignerons Indépendants and the Born Digital Wine Awards. Watch this space!