



### United States:

*The market is still growing, despite a strong euro*

#### Key figures 2013 for Bourgogne wines in the United States

It is the leading market in terms of value for Bourgogne wines

Second market by volume for Bourgogne wines

**Exports: 16.4 million bottles (+6.9% over 2012), for revenue of 168.9 million euros (+7.5% over 2012)**



by volume

- ▶ still white wines: 64%
- ▶ still red wines: 28%
- ▶ Crémant de Bourgogne: 8%

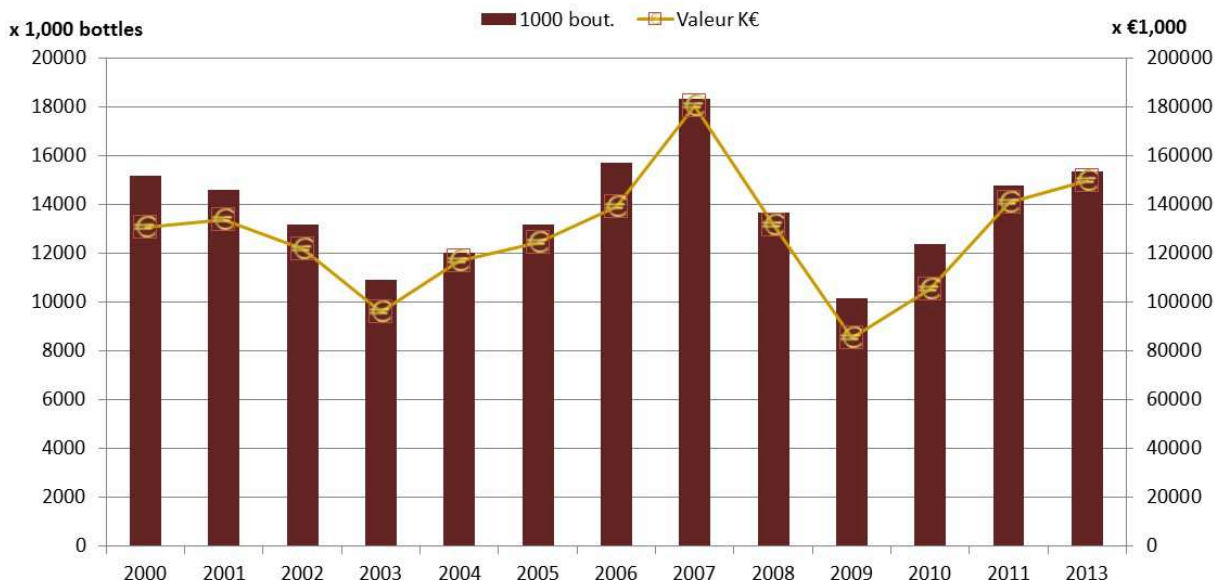
**In 2013, Bourgogne wines accounted for 15% of the volume of French AOC wines exported to the United States, for 17% of total revenues.**

Since 2011, the United States has been the leading importer of Bourgogne wines by value (21.7% of total exports in 2013), ahead of the UK. It is the second biggest market in terms of volume, just behind the UK (respectively 17.8% and 20.5% in 2013), despite the strength of the euro.

Overall wine imports to the United States have been continually growing since the last economic crisis, and increased by 15% in volume between 2011 and 2012 (+8% between 2010 and 2011).

#### Significant upturn in exports of Bourgogne wines after the last recession

##### Export of Bourgogne wines to the USA



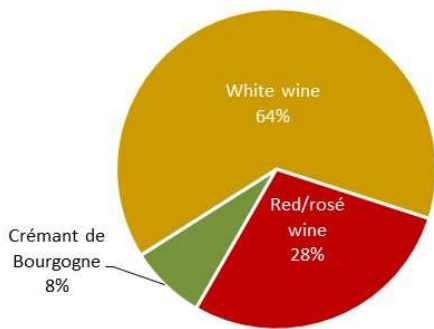
Exports of Bourgogne wines rose by 6.9% in 2013 compared to 2012, returning to close to the record level of 2007 (16.4 million bottles last year compared to 18.3 million in 2007).

In 2013, this growth mainly came from states where the economic crisis had less impact, such as Texas, and those where the economic recovery came earlier (New York, New Jersey, Connecticut, California, Michigan and Minnesota).

However, the potential for development of Bourgogne wine sales in this market remains hampered by the strong euro, opposite a weak dollar.

### Sales of Appellations Régionales whites dominate the market with new records

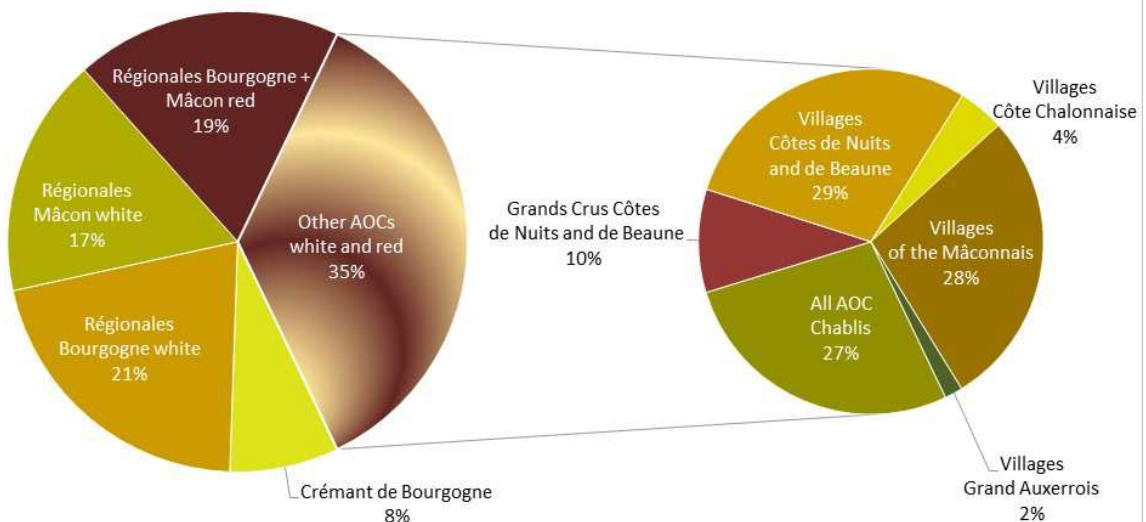
Volume of exports of Bourgogne wines to the USA by color (2013)



Sales of Bourgogne wines to the USA were mainly driven by white wines. They accounted for 64% of the total volume, increasing by 9.4% compared to 2012. Red wines were fairly stable (-1.4% over 2012).

Bourgogne white wines have always led exports to the United States, setting new records over the past 10 years (+9.7 million bottles).

Exports of Bourgogne wines to the USA for groups of AOC (2013)



AOC Régionales account for the majority of sales and were up 13.7% for whites, and 2.1% for reds. Crémant de Bourgogne is gradually finding a market (8% of volumes export, with growth of 21.6% in 2013 compared to 2012).

In general, all other appellations were stable in terms of volume, in particular the reds.

One can also note that sales by value of the white *Grands Crus* from the Côte de Beaune and Chablis, and of *appellations Village* from the Mâconnais held up well.

## Texas and Washington, two states with good potential for Bourgogne wines

**Texas was very little affected by the recent recession.** What's more, regulations on the sale of alcohol were recently relaxed in certain counties. These two factors explain the boom enjoyed by Bourgogne wines in this market, which is now a key export destination.

Distributors and consumers there often refer to the varietals. As such, wines made from Chardonnay and Pinot Noir, which reign supreme in Bourgogne, benefit from strong growth prospects. Among whites, Chardonnay is the top seller for many specialist wine stores, while sales of Pinot Noir are continually growing.

Consumer interest in wines in general is on an upward trend. The challenge faced by Bourgogne wines is to develop distribution of the whole range in order to provide access to the diversity of expression of the Pinot Noirs and Chardonnays from the region. Nowadays, among the wines recommended by specialist sellers/restaurateurs, Chablis, Mâcon and Meursault are among the appellations most often cited.

**In Washington state, Bourgogne wines enjoy an overall good image with market influencers,** as illustrated by these comments: *"Unique, fantastic wines"*; *"some marvelous wines"*; *"the most refined and best French wines"* (UbiFrance 2013). The most in-demand wines are the Bourgogne AOCs of Chablis, Pommard, Gevrey-Chambertin, and more generally, the AOCs of the Côte de Nuits. The AOCs Chablis, Pouilly-Fuissé, Saint-Véran and Viré-Clessé are, in the context of this market, seen as wines with potential.

The importance of food and wine combinations should also be underlined, given that Seattle is considered one of the most "foodie" cities on the West Coast. According to one Seattle retailer, a Bourgogne Pinot Noir goes better with a meal than the Pinot Noir wines from nearby Oregon. And for a blogger based in the state, Chablis is a perfect accompaniment to local seafood.

*This economic report was produced by the Markets and Development department of the BIVB - January 2014*  
(Sources: Customs– UBIFRANCE – BIVB)

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