



### United Kingdom:

### Bourgogne wines repositioning on this market



#### Key 2015 figures for Bourgogne wines in the United Kingdom

2<sup>nd</sup> biggest market in terms of value for Bourgogne wines

2<sup>nd</sup> biggest market by volume for Bourgogne wines

**Exports: 14.9 million bottles (up 1.5 % on 2014), for 116.7 million euros (up 3.8% on 2014)**

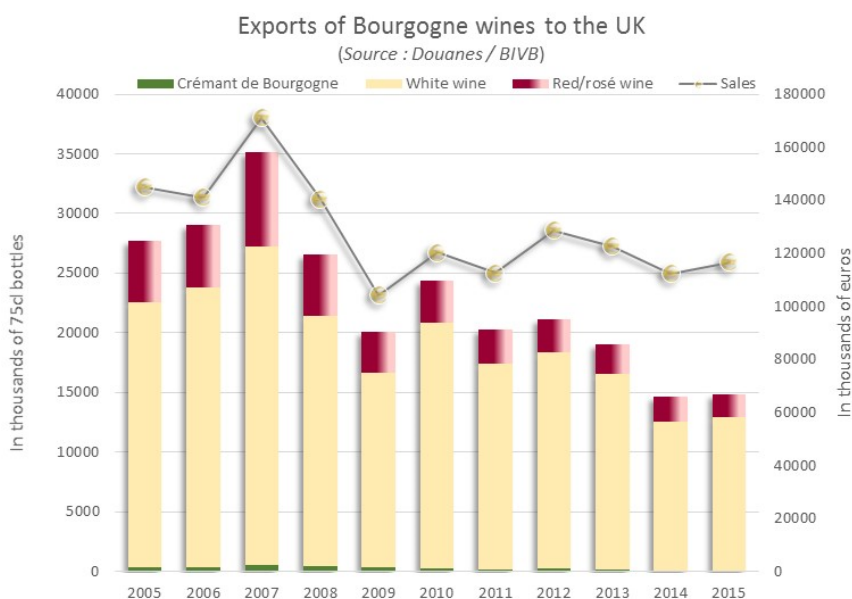
by volume

- ▶ Still white wines : 86%
- ▶ Still red/rosé wines: 13%
- ▶ Crémant de Bourgogne: 1%

**In 2015, Bourgogne wines accounted for 11% of the volume French AOC wines exported to the United Kingdom, and 11.5% of the revenue in this category.**

Since 2014, the United Kingdom has been the second biggest importer of Bourgogne wines by volume (accounting for 19% in 2015), just behind the USA, after many years in first place. After stabilizing in 2015, Bourgogne wine sales in the first half of 2016 returned to revenue almost equivalent to the same period in 2005 (highest revenue for 10 years, apart from the exceptional year of 2007), but with lower volumes (down by 4.2 million bottles). The growth in Bourgogne wines sales in specialist stores in the UK is part explains this performance (see below).

#### The selling price has risen significantly, while volumes remain stable



Exports of Bourgogne wines stabilized in 2015, with a volume of 14.9 million bottles. The volume exported nonetheless remains historically low. This seems to be the result of several factors, including a difficult market for certain AOC wines, and a series of increases in taxes on wine, etc.

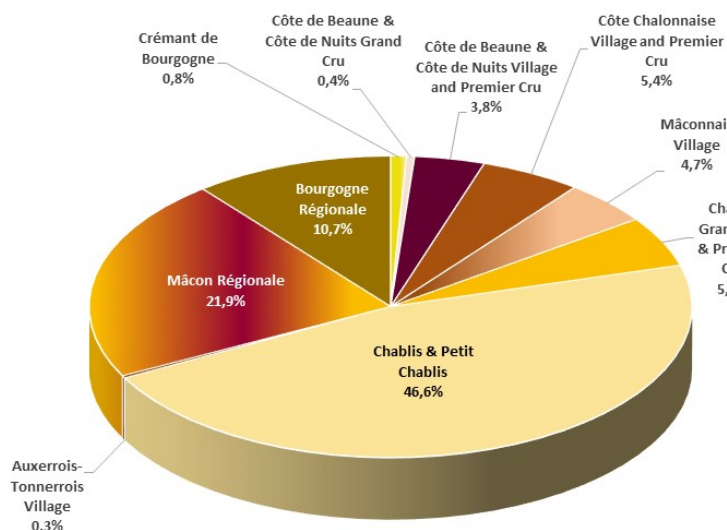
Chablis appellations have enjoyed renewed interest in this market, thanks to promotional operations, facilitated by recent harvests that gave higher yields.

The potential for recovery of Bourgogne wines in the UK remains promising. Export volumes in the first half of 2016 grew by 27.5%, with a 24% rise in revenue over the same period in 2015, mainly due to wines from the Chablis and Mâcon regions.

## Sales of Chablis AOCs dominate the market and contribute to the recovery

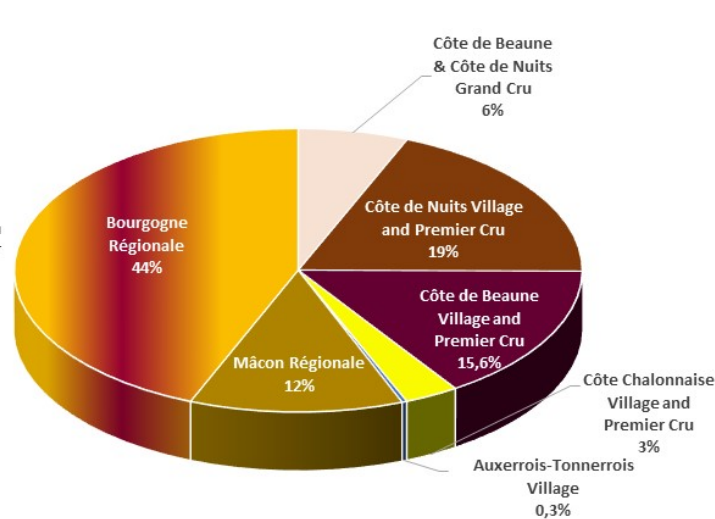
### Export of Bourgogne wines 2015

White wines and Crémant de Bourgogne  
(x 1,000 bottles)



### Export of Bourgogne wines 2015

Red wines  
(x 1,000 bottles)



Sales of Bourgogne white wines account for the lion's share of the UK market (*see table 1*). Over the past 20 years the growth in exports of Bourgogne wines to the United Kingdom has mainly involved whites, which accounted for 86% of bottles shipped in 2015 (equivalent to 12.8 million 75cl bottles, for revenue of 79.4 million euros). This was driven by the strong notoriety of the Chablis appellations, which accounted for more than one in every two bottles of white Bourgogne shipped (52%). The other white wines which showed growth in 2015 were the *Village* and *Village Premier Cru* AOCs of the Côte de Beaune and Côte de Nuits (up 1.6% on 2014).

## Bourgogne wines are present on all distribution circuits

### Supermarket sector

Overall, some 5.2 million bottles of Bourgogne wine were sold on this circuit, for revenue of 60 million pounds. Sales of Bourgogne white wines in British supermarkets grew 12% by volume (*source: IRI*). Operators on this circuit seemed to want to relaunch sales through promotions.

### Restaurants

In the restaurant sector (*2015 survey among 200 points of sale*), Bourgogne wine was in the leading position in terms of the number of references per point of sale and remained stable between 2014 and 2015. For white wines, Chablis appellations were present in 73% of establishments in 2015. *Village* AOCs of the Mâconnais were in 11<sup>th</sup> place, with a presence in 37% of restaurants (up 4.3 points over 2014).

### Specialist wine stores

Bourgogne wines were in second position in terms of the number of references per point of sale, and increased their presence in 2015, up 1.5 points year-on-year (*2015 survey among 50 points of sale*). But in terms of specialist wine stores stocking at least one wine reference from a given region, they were in first place, with 98% of establishments stocking at least one Bourgogne wine. Among the white wine offer, the Chablis AOC was present in 74% of stores in 2015. After Chablis Premier Cru (66%), the most widely available wines were Meursault, in 64% of stores, and Pouilly-Fuissé, present in 58%.

*This economic report was produced by the Markets and Development department of the BIVB - August 2016*  
(Sources: Customs – IRI UK – BIVB – MIBD MARKET)

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