

# BOURGOGNE WINES PRESS KIT

161<sup>th</sup> HOSPICES DE BEAUNE  
WINE AUCTION  
21<sup>st</sup> NOVEMBER 2021





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**Bourgogne vs. Burgundy:** To re-affirm its identity as one of the most iconic vineyard of France,  
the region and its producers are reverting back to  
the **original French iteration of its name - Bourgogne.**

By maintaining this one true identity, Bourgogne returns to its historical roots  
as the consummate brand treasured by consumers the world over.

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## 2021 vintage in Bourgogne: A close care throughout

*The 2021 vintage was a challenge for winegrowers right up until the very last day. From the frost in April, made worse by a very early start to the winegrowing season, right through to the September harvest, it was characterized by some brutal shifts in the weather. Winegrowers had to be extremely reactive and attentive. The only moment of respite came with flowering, which was ideal for fruit formation, and véraison, which was accompanied by sunshine from mid-August. In the end, hard work was rewarded with success, low volumes aside. Indeed, while conveying his hope that the 2022 vintage will offer an easier ride, François Labet, co-president of the BIVB confirmed his opinion that, "Small is beautiful!"*

Aside from the low yields due to frost, and hail in June in certain parts of the Mâconnais, the grapes were sorted meticulously, both in the vines and in the winery. The capricious weather in July and early August encouraged the development of pockets of disease, but these were fortunately contained thanks to the efforts of the winemakers and the return of dry weather later in August.

The general opinion is that the 2021 is an interesting vintage to work with because it requires great technical skill and vinification must be very precise. Although fermentation was rapid, one had to pay a great deal of attention to the extraction of tannins and color for the reds, and to the aromatic balance of the whites.

The impression from the first tastings is that the musts have good aromatic potential and the sugar-acidity ratio suggests a style appreciated by fans of Bourgogne wines.

**Click on the image to discover the 2021 vintage in video  
presented by Isabelle Meunier**



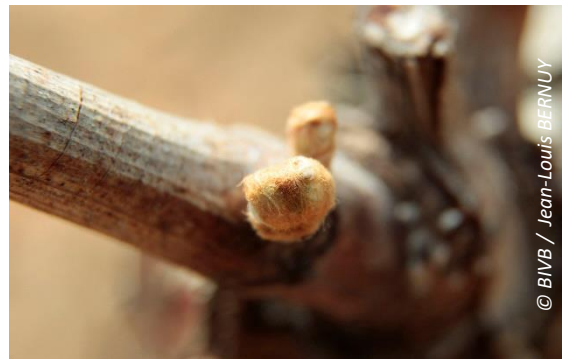
## The weather that shaped the 2021 vintage

*After three years of early harvests that began in August, the 2021 vintage marked a return to more traditional dates for Bourgogne. Picking started on 18 September for still wines. The low yields resulting from the frost in April meant that harvesting took much less time than normal, and all grapes were picked by early October. With unpredictable weather throughout the summer, with some brutal shifts in temperature and localized rain, winegrowers had to work hard right through to the end.*

### An historic frost, both in terms of area and intensity

The winter of 2020-2021 saw alternating periods of mild and cold weather. But overall, it was milder and wetter than the average over 1994-2020 (see charts below). The weather cooled sharply in mid-March before warming significantly to more summery temperatures during Easter week from 29 March to 3 April.

This suddenly stimulated the growth cycle of the vines, and in the space of a few days in early April, some plots – mainly Chardonnay – reached the mid-budburst stage. This was followed by a brutal change on the night of 4 April. A huge mass of polar air descended on the region, bringing thick frost, between 6-9 April in particular. This affected the entire winegrowing region and the fragile buds that had just emerged from their cotton wool cocoons. This would have a huge impact on the future yield, but it was impossible to estimate the loss as the damage was unevenly spread across the vines.



The vines were shaken by this episode and took time to return to growth, all the more so as the weather turned wetter and colder than usual. And there was no surprise that the secondary buds offered very little in terms of fruit.

Fortunately, the temperature returned to normal in early June, and rose suddenly from 8 June onwards, bringing much warmer weather than usual.

### Fast and favorable flowering

Flowering then took place extremely quickly, thanks to the hot and dry weather that provided ideal conditions for pollination and fruit set. The mid-flowering date (when 50% of flowers have blossomed) was close to that observed in 2019: Between 13 June for the Chardonnay in the Mâconnais, and 18 June for the Pinot Noir on the Côte de Nuits. Although the pace was fast, fruiting was disparate across the region depending on frost damage.

The high temperatures continued, encouraging very quick growth which meant that the 2021 vintage was able to make up some of the time lost in April and May.



## A cool start to the summer

From the end of June to the beginning of August, the rain set in. The vines grew very quickly, which required hard work on the part of winegrowers, with the raising of the vines proving to be particularly time-consuming. They also had to tackle the threat of disease which was making an appearance.

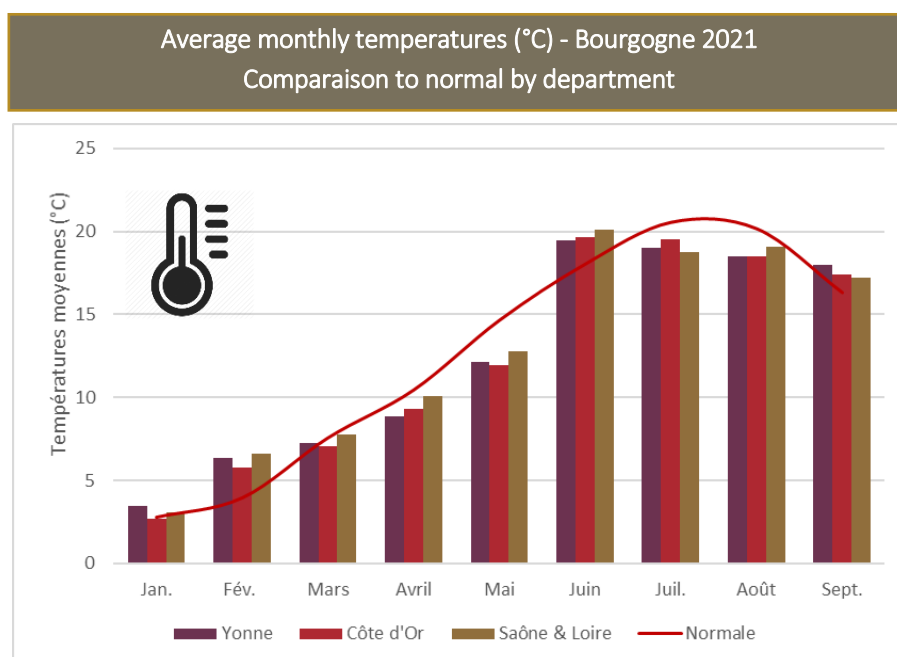
They finally got some respite mid-August, with the return of a long spell of dry weather. The mid-*véraison* stage, when the grapes change color, occurred around mid-August. The dry weather and a northerly wind allowed the grapes to ripen gradually.

## Picking started with the Pinot Noir

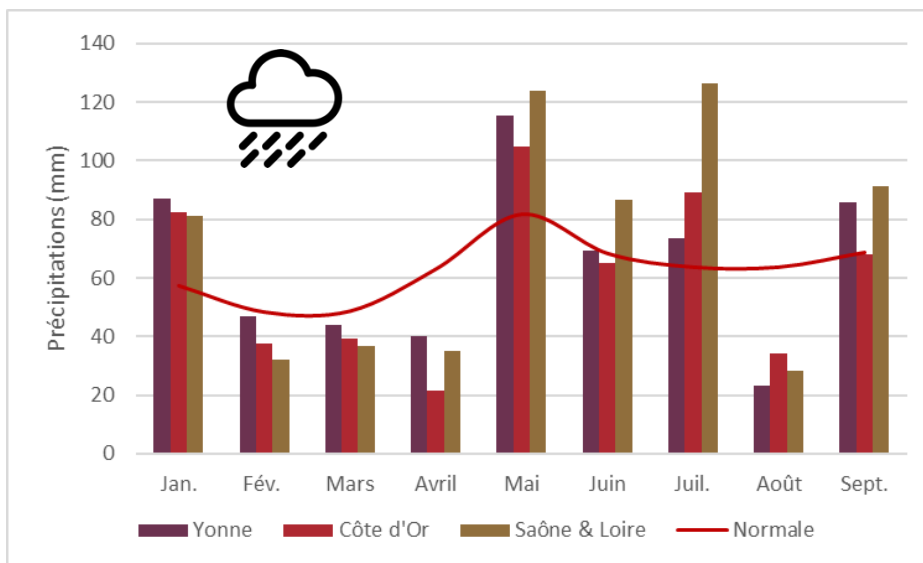
This interlude was short-lived. The end of August marked the beginning of a period of autumnal weather that continued until the harvest. Winemakers had to monitor the grapes' aromatic and phenolic maturity on a daily basis, while taking into account the weather in order to harvest at the desired ripeness.

Harvesting of grapes for Crémant de Bourgogne wines began on 8 September in the southern part of Bourgogne, with picking of those for still wines beginning around 18 September. Unusually, the red grape varieties of Pinot Noir, Gamay, and César were the most advanced in terms of maturity, especially the Pinot Noir. Many began their harvests with the reds to capture the aromatic maturity of the grapes. The Chardonnay grapes ripened a little later, probably due to the stress caused by the frost, and were thus picked last.

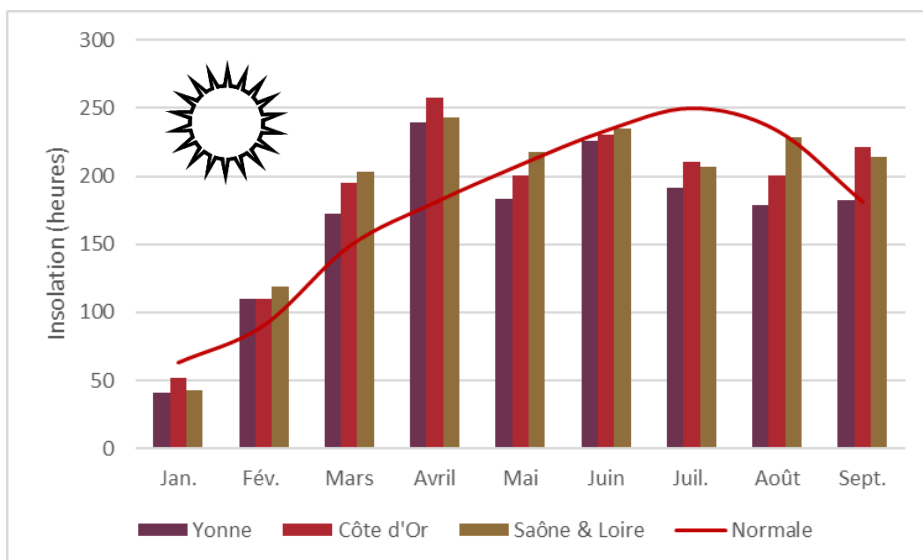
Yields were very mixed across all sectors. Winegrowers had to deal with low volumes, and even some extremely low volumes on those vines most affected by frost and/or hail. Those grapes required drastic sorting both in the vines and upon arrival in the winery.



Average monthly rainfall (mm) – Bourgogne 2021  
Comparaison to normal by department



Average monthly sunshine (hours) – Bourgogne 2021  
Comparaison to normal by department



*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.*

## 2020: A remarkable vintage for Bourgogne wines

***2020 will remain in the memory for many reasons. Not only was it the year of lockdowns and pandemic; it was also a unique and very satisfactory vintage for producers and merchants in Bourgogne.***

This vintage was an historically early one, from budburst right through to harvest. The hot and sunny weather also ensured the grapes were bursting with health on the vines.

Even more surprisingly, tasting has confirmed that despite the high temperatures and almost constant drought conditions, in addition to their rich aromas, the wines are also revealing a freshness that is as unexpected as it is remarkable. Fans of Bourgogne wine will be delighted.

With volumes of around 1.56 million hectoliters, the 2020 vintage is sure to enjoy a great future.



### White wines

#### ■ Chablis and Grand Auxerrois

The 2020 vintage will go down in history thanks to the richness of its wines and their wonderful ageing potential. On the nose, they offer lovely intensity, marked by pleasant aromas of ripe fruit. Notes of apricot and candied citrus mingle with tropical fruit and lime blossom. In the mouth, they are broad and perfectly balanced, maintaining a pleasant freshness and a very enjoyable mineral side.

#### ■ Côte de Beaune

Perfectly ripe grapes combined with an acidity that stood up to the hot weather has resulted in concentrated and superbly balanced wines. The nose evokes yellow and tropical fruit like mango, grapefruit, orange, and bergamot, and they offer impressive length in the mouth. This vintage will be hailed on dining tables in three to five years' time, and even later for the *Village Premier Cru* and *Grand Cru* wines.

#### ■ Côte Chalonnaise

Like their neighbors on the Côte de Beaune, these wines offer great aromatic richness. Beautifully ripe grapes thanks to a very hot and dry summer have led to notes of very ripe citrus, pineapple, apricot, and acacia flower. On the palate, they are well-balanced; fresh, but dense and opulent. On the finish, they are indulgent, marked by pleasant mineral notes, with the promise of great ageing potential.



## ■ Mâconnais

Remarkable freshness and exemplary concentration mean these wines have all the potential to reach great heights. On the nose, citrus, yellow fruit, pineapple, and dried fruits combine with intense floral notes. In the mouth, they are rounded and smooth, with excellent acidity and an indulgent finish. 2020 is a vintage that will leave its mark.

## Red wines

### ■ Grand Auxerrois

After two exceptional years, the Grand Auxerrois continues its upward momentum, offering high-quality wines to fans of this lesser-known region. The heat and the drought over the growth cycle have resulted in intensely colored and aromatic wines. On the nose, they offer notes of dark berries, licorice, and spices. While in the mouth, they are very structured with great concentration. The tannins are still closed and tight, promising indisputable keeping potential.



### ■ Côte de Nuits

It is tough to imagine a better vintage than the 2020 on the Côte de Nuits. The colors are deep red, the uncommonly intense nose is marked by richly fruity notes. Black cherry, blackberry, blackcurrant, cocoa, and licorice mingle with delicate scents of rose, peony, violet and sweet spice. On the tongue, they demonstrate impressive concentration whilst remaining extremely smooth. With great body and a magnificent tannic structure, these wines are promised a dazzling future.

### ■ Côte de Beaune

Here again, these are wines that are close to perfection. With wonderful color, aromatic intensity, and quality, they are truly exemplary. On the nose, they offer an explosion of summer and hedgerow fruits, spices, and blond tobacco, while in the mouth, they are perfectly balanced. These wines are fleshy and full-bodied, with a tasty finish and surprising length. Like all wines from great vintages, they will reveal their qualities in a few years' time. 2020 is a vintage of superlatives the like of which is rarely seen.

### ■ Côte Chalonnaise

Here too, superlatives are the order of the day. The wines are very rich, with notes of black berries, cherry kernels, gingerbread, violet, and licorice. On the palate, they are full-bodied yet yielding, marked by a wonderfully fresh feel and silky, tightly-woven tannins. 2020 is a vintage for ageing and is rightfully up there amongst the greats.

*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.*

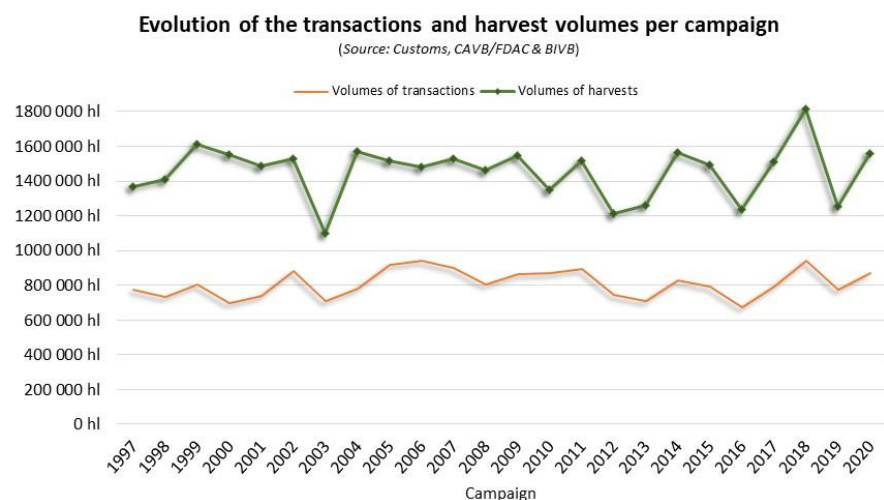
## Bourgogne wines are flirting with records but producers remain prudent in the face of uncertainty

*In 2021, Bourgogne wines enjoyed growth in terms of exports to almost all markets. That was even better than 2019<sup>1</sup>. This was mainly due to the 2020 harvest, the boom in consumption during confinement, and government recovery schemes. Over the coming year, however, this may well be challenged by the slim pickings of the 2021 harvest and the potential slowdown of the global economy.*

- ▶ *The 2020 harvest (almost 1.56 million hectoliters) is still boosting sales from the winery and transactions.*
- ▶ *The 2021 harvest is estimated to be between 900,000 and 950,000 hectoliters, around half of a normal harvest.*
- ▶ *Although stocks by the end of July 2021 seemed to be down on the five-year average, they are being supplemented by equivalent stocks in the négoce trade.*
- ▶ *In terms of exports, growth was strong, with results even better than 2019, up 21.8% by volume and 26.4% in terms of revenue for the first nine months of 2021 compared to the same period in 2019.*
- ▶ *In France, Bourgogne wines continued to show growth, particularly thanks to their presence across all kinds of retail outlets.*

### Sales from the property<sup>2</sup> driven by the good 2020 harvest

In 2020, the volume of grapes harvested (almost 1.56 million hectoliters) was higher than the average for the past five vintages (1.46 million hectoliters from 2015-2019). This was excellent news after the 2019 vintage, one of the smallest over the past decade (1.25 million hectoliters).

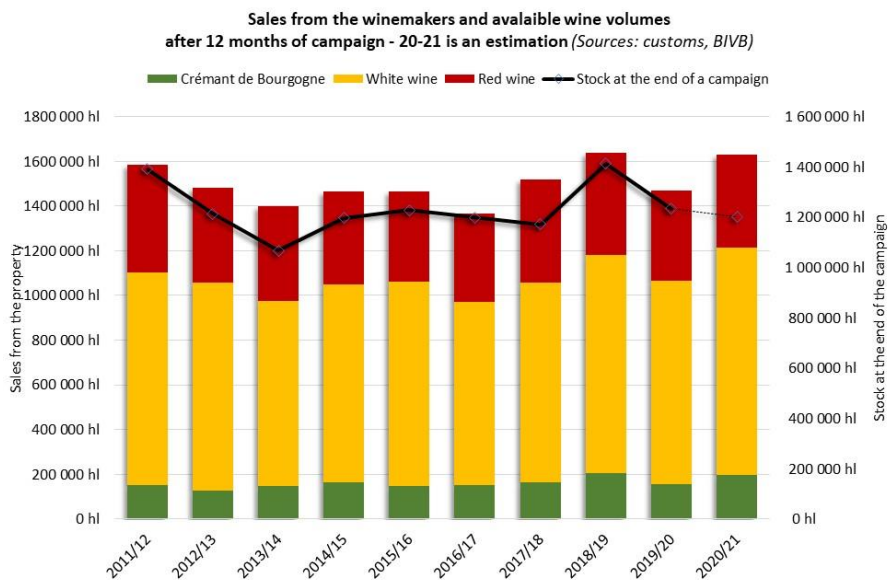


<sup>1</sup> The gradual lockdown of countries caused by COVID-19 put a powerful brake on international trade, making 2020 a very unusual year. And for this reason, in this document we are favoring a comparison with results from 2019 for these most recent export figures.

<sup>2</sup> Sales from the property: Volumes sold from estates and cooperative cellars (in bulk and in bottles)

As such, the very high quality 2020 vintage had a big impact on transactions which returned to growth on a global level and gave a welcome boost across the entire Bourgogne.

- The volume of transactions in 2020-2021 (869,141 hectoliters) was up 12% compared to the 2019-2020 campaign and 9.3% compared to the average over the past five campaigns back to 2015-2016. The availability of the 2020 vintage (89% of volumes of transactions in 2020-2021) soon compensated for the low volumes of the 2019 vintage.
- Sales from the winery during the 2020-2021 campaign (1.63 million hectoliters) were up 10.9% compared to the 2019-2020 campaign. All colors profited from this strong dynamic: White wine (up 12%), Crémant de Bourgogne (up 25%) and even red wine (up 1.8%), despite slightly lower volumes for the 2020 vintage (down 1.7% compared to 2019).



- Stocks in the winery at the end of the 2020-2021 campaign were estimated at close to 1.2 million hectoliters, almost the same as for the 2016-2017 and 2017-2018 campaigns, which were also impacted by a small harvest, that time from 2016. In addition, there was similar stock with the *négoce* trade. This left Bourgogne with the equivalent of almost two years of average yields in stock on the eve of the harvest.
- The arrival of the 2021 harvest, of between 900,000 and 950,000 hectoliters, had an immediate impact on transaction volumes for the 2021-2022 campaign. However, sales from the property at the start of this campaign, excluding sales of the 2021 vintage, remain on a positive trend, up 2.3% by volume compared to the same period in the previous year, and stable compared to the five-year average, thanks to the 2020 vintage.

**The current situation is not unprecedented, since the average annual harvest of around 1.4 million hectoliters between 2017 and 2021 is identical to that of the previous five-year period from 2013-2017. Bourgogne industry players will nevertheless make sure to carefully supply their markets over the coming year, as they did after the 2016 and 2013 vintages.** They remain very vigilant as the current boom in consumption and the small 2021 harvest will require very careful management of volumes and distribution, which will present a major challenge over the next two years.



## Export: Bourgogne wines exceed results from before the COVID-19 crisis

The end of lockdown and gradual easing of restrictions caused by the pandemic are provoking a consumption boom in many countries. Exports of Bourgogne wines have been directly impacted by this and are also benefitting from the lifting of American levies. They have returned to growth after a stable 2020: Up 21.8% by volume and 26.4% in terms of revenue for the first 9 months of 2021 compared to the same period in 2019.

One should remember that in a context of falling exports of French AOC wines in 2020, down 4% by volume and 12.7% in terms of revenue compared to 2019, Bourgogne wines stood up well:

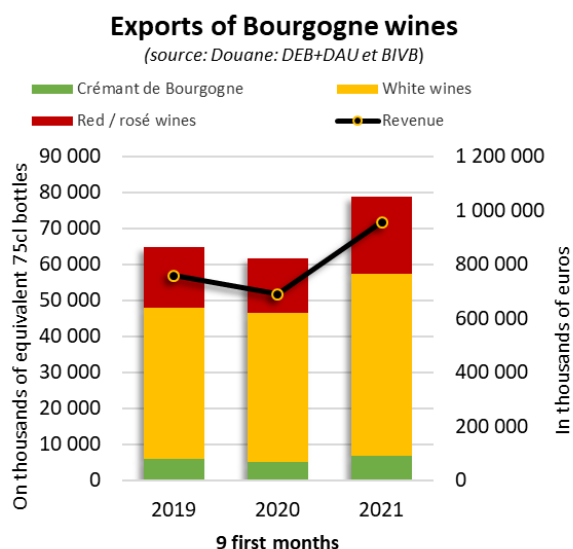
- Exports remained almost stable, down just 0.3% by volume (89.33 million bottles) and 0.7% in terms of revenue compared to 2019.
- Revenue remained above the symbolic bar of a billion euros at €1.032bn.

Nobody knows how much time this global upturn will last in the face of potential new waves of COVID-19, raw material supply shortages, and international political or economic tensions.

Bourgogne was the fastest French AOC wine region to return to growth, in the first three months of 2021 compared same period in 2019:

- Revenue was up 7.8% compared to a fall of 2.7% for French AOC wines
- Volumes rose 8.8%, compared to up 1.6% for French AOC wines

Over the first nine months of 2021, Bourgogne wines keep their lead over exports of all French AOC wines:



- Volumes were up 21.8% while they were up 8.8% for all French AOCs compared to the first nine months of 2019
- Revenue was up 26.4% compared to up 13.2% in 2019

Bourgogne wines broke new records for exports in this favorable context:

- Volumes exported broke the record set in the first nine months in 2007 (up 2%), just prior to the recession in 2008. and that of the first nine months of 1998 (up 2.9%), another record year for the region.
- In terms of revenue, another new record was reached by Bourgogne: Nearly 957 million euros for the first nine months of 2021.

### All colors of Bourgogne wine profited:

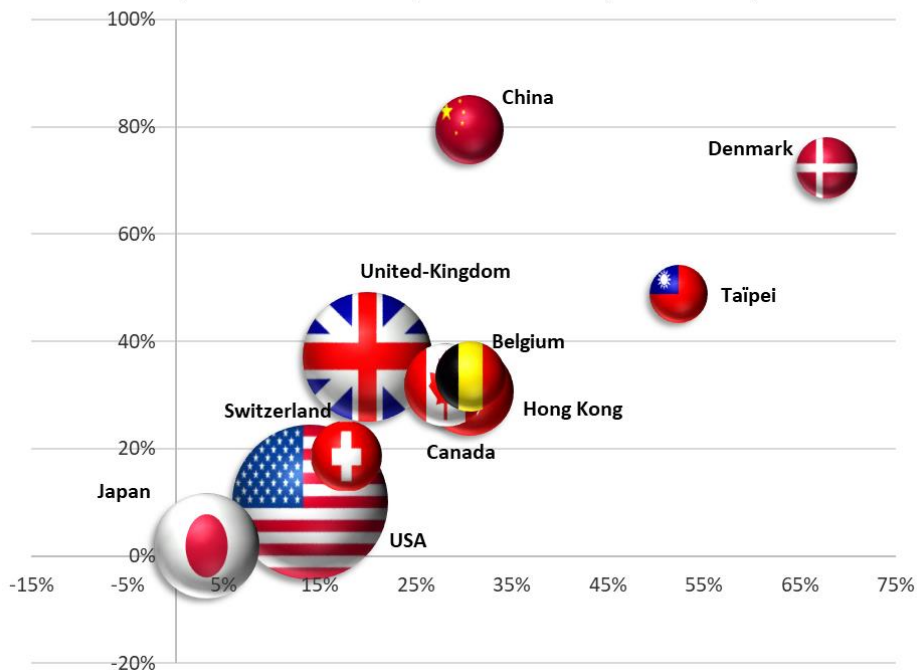
- White wine: Up 19.5% by volume and 23.6% in terms of revenue
- Red wine: Up 28.3% by volume and 28.9% in terms of revenue
- Crémant de Bourgogne: Up 12.5% by volume and 14.9% in terms of revenue

## ■ Exports up across almost all markets

These excellent results will clearly be challenged by the return to normal consumption, a slowdown of economies due to a lack of raw materials and semi-conductors, and by potential future waves of the pandemic.

### Change in the export of Bourgogne wines

(source : Douane DEB+DAU, BIVB - 9 months 2021 / 9 months 2019)



#### How to read this chart:

The size of the bubble is proportionate to the export revenue from Bourgogne wines in each market over the period:

- Horizontal axis: Change in volumes **compared to the same period in 2019**
- Vertical axis: Change in revenue **compared to the same period in 2019**

## ► United States



**The leading market in terms of revenue and by volume**

After a tough 18 months due to the 25% ad valorem tax<sup>3</sup>, Bourgogne wines have, since the spring, been benefitting from the lifting of this levy, with exports up 14% by volume and 10% in terms of revenue compared to the first nine months of 2019.

All colors showed good growth, almost compensating for losses by volume and revenue over the first nine months of 2020 compared to the same period a year previously:

- White wine rose 16% by volume and 8.6% in terms of revenue
- Red wine was up 8.8% by volume and 11.2% in terms of revenue
- Crémant de Bourgogne exports grew 17.4% by volume and 15.3% in terms of revenue

<sup>3</sup> This tax was imposed on certain European products, including still French wines below 14° alcohol, as part of the Boeing/Airbus dispute. It was introduced on 19 October 2019 and suspended in mid-March 2021.

Similarly, most AOC groups returned to the market:

- *Régionale* Bourgogne AOCs (39% of volumes exported) were up 8.7% by volume
- The four Chablis AOCs (15.1% of volumes exported) rose 22% by volume, mainly due to Chablis and Petit Chablis
- *Régionale* Mâcon AOCs (14.3% of volumes exported) were up 12% by volume.

Globally, French wines AOCs as a whole grew more slowly: Up 11% by volume and 5.5% in terms of revenue.

The USA saw GDP rise by 6.6% during the second quarter of 2021. This was inflated by expenditure by consumers who had saved money during the pandemic, but also by the Biden government's huge recovery plan of \$1.2 trillion. This advantageous economic climate was nonetheless threatened by the Delta variant.

## ► The UK



The second-biggest market in terms of revenue  
and by volume

Over the first nine months of 2021, Bourgogne wine exports grew by volume and value, (respectively up 20% and 37.1% compared to the first nine months of 2019).

These results, that were unexpected after an already very good year in 2020, with exports up 7.3% and 1,9% compared to the first nine months of 2019, was partly due to a continuation of temporary measures to boost imports post-Brexit.

All colors of Bourgogne wine profited from this new dynamic, compared to the previous year:

- White wine (78.3% of volumes) was up 11.9% by volume
- Red wine (18.4% of volumes) rose 60.3% by volume
- Crémant de Bourgogne (3.3% of volumes) grew 77.1% by volume

But not all French winegrowing regions benefitted from this economic situation and as such, export volumes of all French AOCs grew much more slowly in comparison to pre-pandemic volumes: Up 2.1% in volume for the first nine months of 2021 compared to the same period in 2019.

The UK enjoyed a more rapid economic recovery compared to other countries in the EU, thanks to an early vaccination program and the lifting of COVID restrictions starting on 12 April. However, it is still yet to return to its pre-crisis level, having been hit much worse by the pandemic than neighboring countries. The UK has also been hit with a new wave of infections since October, the consequences of which are yet to be felt in the medium term.

It remains to be seen what import rules will be put in place as a result of Brexit and which could have an impact on trade as early as 2022.



## The other three traditional top five export markets by volume (Canada, Japan, and Belgium)

continued to grow imports of Bourgogne wines over the first nine months of 2021.

Canada and Belgium showed double-digit growth in the first nine months of 2021 compared to the same period in 2019. Canada was also alone in seeing growth by volume and revenue during the same period in 2020.

### ► Japan



**The third-biggest market in terms of revenue  
and the fifth by volume**

Exports to Japan in the first eight months of the year were stable between 2016 and 2020. But over the first nine months of 2021, exports were up 3.3% by volume and up 1.9% in terms of revenue over the same period in 2019.

- Red wine: Unlike the other top-five countries, red wines have enjoyed the only growth by volume in Japan (up 19.4%), with a lovely growth in terms of revenue (up 13.8%).
  - *Régionale* Bourgogne AOCs (73.7% of volumes exported) were up 24% by volume and 28.1% in terms of revenue
- White wine and Crémant de Bourgogne were unable to return in 2021 to levels they enjoyed over the first nine months of 2019: Down 7.9% by volume for whites and down 15.7% for Crémant de Bourgogne (representing around 3.7% of volumes exported). They were also down in terms of revenue by 10.6% for the whites and 8% for Crémant de Bourgogne.

### ► Canada



**The fifth-biggest market in terms of revenue  
and the third by volume**

Canada held onto third place in terms of exports by volume over the period, showing growth of 28.1% by volume and 31.9% in terms of revenue compared to the first nine months of 2019.

- White wine (66.3% of volumes exported) was up 30% by volume
  - *Régionale* AOCs (58.9% of volumes of whites) were up 15% by volume and 22.1% in terms of revenue
  - The four Chablis AOCs (34.3% of volumes of whites) were up 68.2% by volume and 54.1% in terms of revenue
- Red wine (29.4% of volumes exported) was up 33.2% by volume
- Only Crémant de Bourgogne (4.3% of volumes exported) went down 13.7%

### ► Belgium



**The seventh-leading market in terms of revenue  
and the fourth biggest by volume**

Belgium nudged ahead of Japan in terms of export volumes, thanks to growth on two fronts, with exports up 3.7% by volume and 33.5% in terms of revenue compared to the first nine months of 2019.

All colors profited from this boom:

- White wine (74.9% of volumes and 68.4% of the value) was up 28.7% by volume and 32.8% in terms of revenue
  - *Régionale* Mâcon and *Village* AOCs from the Mâconnais (49.7% of volumes of whites) were up 23.8% by volume and 26% in terms of revenue
  - *Régionale* Bourgogne AOCs (21% of volumes of whites) were up 28.9% by volume and 40.3% in terms of revenue
- Red wine (13.4% of volumes exported and 25% of the value) saw a rise of 34.9% by volume and 34.2% in terms of revenue
- Crémant de Bourgogne (11.7% of exports by volume) were up 39.3% by volume and 38% in terms of revenue

## Exports of Bourgogne wines to three of the top-15 importing countries continued to grow in the first nine months of 2021.

### ► Switzerland



The sixth-biggest market in terms of revenue and the 13<sup>th</sup> by volume

Switzerland held onto sixth place in terms of revenue over the period, with growth of 18.6% by volume and 21.5% in terms of revenue compared to the first nine months of 2019.

- White wine (59.5% of volumes exported) was up 12.2% by volume
  - The four Chablis AOCs (43.6% of white wine volumes) were up 34.4% by volume and 34.8% in terms of revenue
  - *Régionale* Bourgogne and Mâcon AOCs (27.3% of white wine volumes) were up 30.1% in terms of revenue and down 7.6% by volume
  - *Village* and *Village Premier Cru* AOCs from the Côte de Nuits and Côte de Beaune (12.5% of white wine volumes) were up 14.6% by volume and up 51% in terms of revenue
- Red wine (39.1% of volumes exported) was up 30% by volume
- Crémant de Bourgogne (1.4% of volumes exported): Down compared to the first nine months of 2019

### ► Sweden



The 10th-biggest market in terms of revenue and the sixth by volume

Sweden is the leading export market in Scandinavia for Bourgogne wines by volume and it has enjoyed constant growth since the 2000s. This growth remained strong in 2021: Up 16.8% by volume and 20.1% in terms of revenue compared to the first nine months of 2019.

- White wine (57.4% of volumes exported) was up 16.3% by volume
  - The four Chablis AOCs (50% of white wine volumes) were up 7.3% by volume and 4.9% in terms of revenue
  - *Régionale* Bourgogne and Mâcon AOCs (44.5% of white wine volumes) were up 22% by volume and 19.2% in terms of revenue
- Red wine (15.4% of volumes exported) was up 21% by volume
- Crémant de Bourgogne (27.2% of volumes exported) was up 15.7% by volume

### ► Denmark



The ninth-biggest market in terms of revenue and the eighth-biggest by volume

Denmark is the second leading export market in Scandinavia by volume and in terms of revenue. In 2020, it returned to the strong levels of imports it enjoyed in 2011. The first nine months of 2021 confirmed this shift, with exports up 67.8% by volume and 72.3% in terms of revenue compared to the first nine months of 2019.

- White wine (58.4% of volumes exported) was up 63.3% by volume
  - *Régionale* Bourgogne and Mâcon AOCs (47% of white wine volumes) were up 86.8% by volume and 80.7% in terms of revenue
  - The four Chablis AOCs (37% of white wine volumes) were up 28.9% by volume and 31.8% in terms of revenue
- Red wine (26.7% of volumes exported) was up 130.9% by volume
- Crémant de Bourgogne (14.9% of volumes exported) was up 21.4% by volume

## Three Asian markets performed particularly well in 2021

Hong Kong, Taiwan, and China mainly import red Bourgogne wines, and over the first nine months of 2021, these three markets enjoyed very strong export growth by volume and in terms of revenue.

### ► Hong Kong

 **The fourth-biggest market in terms of revenue and the 14<sup>th</sup> by volume**

Hong Kong held onto its fourth place in terms of revenue over the period, with growth up 30.6% by volume and 30.7% in terms of revenue compared to the first nine months of 2019.

- Red wine (51.5% of volumes exported) was up 38.6% by volume
  - *Village, Village Premier Cru* and *Grand Cru AOCs* from the Côte de Nuits and Côte de Beaune (58.6% of all red wine export volumes) were up 78.9% by volume and 76.3% in terms of revenue
  - *Régionale Bourgogne AOCs* (37.6% of all red wine export volumes) were up 70.2% by volume, but down 2.4% in terms of revenue
- White wine (47.4% of white wine volumes exported) was up 21.6% by volume
- Crémant de Bourgogne (1.1% of volumes exported) was up 161.5% by volume

### ► China

 **The eight-biggest market in terms of revenue and the 10<sup>th</sup> by volume**

China moved into eighth place in terms of revenue for the period, with growth up 30.6% by volume and 79.5% in terms of revenue compared to the first nine months of 2019.

- Red wine (64% of volumes exported) was up 5.5% by volume
  - *Régionale Bourgogne AOCs* (66.5% of all red wine export volumes) were up 57.9% in terms of revenue and down just 4.4% by volume, following on from very dynamic figures in 2019.
  - *Village, Village Premier Cru* and *Grand Cru AOCs* from the Côte de Nuits and Côte de Beaune (27.3% of all red wine export volumes) were up 50.4% by volume and 84.8% in terms of revenue
- White wine (35% of volumes exported) was up 126% by volume
- Crémant de Bourgogne (1% of volumes exported) was up 158.6% by volume

### ► Taiwan

 **The 11<sup>th</sup>-biggest market in terms of revenue and the 18<sup>th</sup> by volume**

Taiwan moved into 10<sup>th</sup> place in terms of revenue over the period, with growth up 52.3% by volume and up 48.8% in terms of revenue compared to the first nine months of 2019.

- Red wine (60.6% of volumes exported) was up 44.9% by volume
  - *Village, Village Premier Cru* and *Grand Cru AOCs* from the Côte de Nuits and Côte de Beaune (55.7% of all red wine export volumes) were up 56.5% by volume and 40.9% in terms of revenue
  - *Régionale Bourgogne AOCs* (30.7% of all red wine export volumes) were up 5.6% by volume but fell by 2.8% in terms of revenue
- White wine (37.6% of volumes exported) was up 69.7% by volume
- Crémant de Bourgogne (1.9% of volumes exported) was up 9.9% by volume



## Exports of Bourgogne wines

for the first nine months of 2021 compared to the first nine months of 2019 (sources: Customs DEB+DAU - BIVB)

Destinations	In thousands of 75cl bottles			In thousands of euros		
	Total January to Sept. 2021	Total January to Sept. 2019	Evolution in volumes	Total January to Sept. 2021	Total January to Sept. 2019	Evolution in value
<b>Total of the exportations</b>	<b>78 928</b>	<b>64 810</b>	<b>21,8%</b>	<b>956 973</b>	<b>757 345</b>	<b>26,4%</b>
ETATS-UNIS	16 198	14 209	14,0%	198 915	180 758	10,0%
United Kingdom	11 965	9 972	20,0%	137 841	100 512	37,1%
Japan	6 064	5 874	3,2%	89 885	88 238	1,9%
Hong Kong	1 146	878	30,6%	63 424	48 509	30,7%
Canada	7 370	5 752	28,1%	55 831	42 319	31,9%
Switzerland	1 415	1 202	17,7%	41 084	34 647	18,6%
Belgium	6 805	5 208	30,7%	39 586	29 655	33,5%
China	2 149	1 645	30,6%	38 467	21 429	79,5%
Denmark	2 890	1 722	67,8%	30 589	17 753	72,3%
Sweden	4 643	3 974	16,8%	27 553	22 950	20,1%
Taipei	746	490	52,3%	26 788	18 003	48,8%
Netherlands	3 395	2 346	44,7%	26 345	14 700	79,2%
South Korea	1 550	540	187,0%	23 257	8 553	171,9%
Germany	2 179	2 671	-18,4%	21 197	22 228	-4,6%
Singapore	475	382	24,1%	18 218	12 457	46,3%
Australia	1 417	1 331	6,4%	17 057	14 819	15,1%
Italia	802	518	54,9%	12 022	8 549	40,6%
Israel	797	355	124,4%	6 488	2 839	128,5%
Spain	408	354	15,4%	5 671	5 726	-0,9%
brasil	499	287	74,1%	4 923	2 602	89,2%
Ireland	777	513	51,5%	4 838	3 373	43,4%
Luxembourg	234	188	24,1%	4 183	2 917	43,4%
United Arab Emirates	409	402	1,7%	4 142	6 118	-32,3%
Austria	178	154	15,7%	4 037	2 641	52,9%
Lithuania	261	203	28,9%	3 333	1 612	106,7%
Letva	321	182	76,2%	3 300	1 528	115,9%
Poland	406	194	109,6%	3 237	1 291	150,8%
New Zeland	187	88	112,9%	2 580	1 451	77,8%
Finland	258	174	48,1%	1 778	1 335	33,2%
Mexico	198	178	11,0%	1 666	1 550	7,4%
Other countries	2 784	2 826	-1,5%	38 739	36 283	6,8%

Economic report produced by the Markets and Development department of the BIVB - November 2021

(Sources: Douanes DEB+DAU, CAVB/FDAC, IRI, BIVB)



# BOURGOGNE

Bourgogne Wine Board

## The Grands Jours de Bourgogne 2022: At last, the great reunion!



*The date has been set for the next edition of the Grands Jours de Bourgogne, which will run from 21-25 March 2022. Winegrowers and négociants will once again be able to welcome market influencers and journalists from around the world to discover the latest vintages of the 84 Bourgogne appellations.*

*The event will run over five days, featuring 12 tasting sessions in 10 different locations from Chablis to Mercurey, and will feature around 1,000 exhibitors presenting 6,000 wines. It will provide a great opportunity to come together in person once again.*

*Visitors will be immersed into the terroir of the Bourgogne winegrowing region, meeting with industry representatives for convivial moments of networking and discovery.*

*Optimize your time and fix up as many meetings as possible while developing your knowledge of Bourgogne wines.*

### A key event on the international calendar

**For the past 30 years, this event has brought together wine industry professionals and key actors from the market in the heart of the Bourgogne vineyards. It has taken place every other year since 1992.**

From Chablis to the Côte Chalonnaise, and from the Côte de Nuits to the Côte de Beaune, visitors will be able to explore the *terroir* through **10 different tasting sites**. For practical reasons, the wines of the Mâconnais will be offered for tasting in Beaune.

This unique event, which is now key on the international calendar, is highly anticipated by a Bourgogne wine industry that is impatient to welcome back international visitors.



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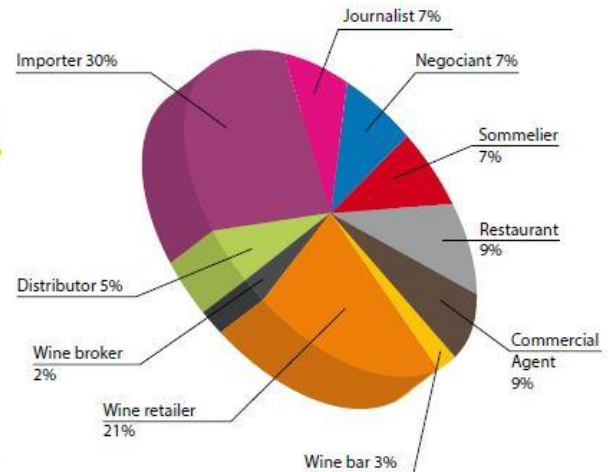
## Key figures from the 2018 edition

- 2,311 visitors including 51% first-timers
- More than 10,000 total entries
- 14 tasting locations
- 1,088 exhibitors, up 6.6 % over 2016
- 93% market influencers and 7% journalists
- 43% French visitors and 57% foreign visitors with 49 different nationalities

The breakdown of visitors by professional category in 2018 was similar to that for the 2016 edition, with a majority of importers (30%) followed by representatives of wine stores and specialist boutiques (21%).



Origins of visitors to the Grands Jours de Bourgogne in 2018



Visitors in 2018 by professional category

## Registration and preparation

The new [www.grands-jours-bourgogne.com](http://www.grands-jours-bourgogne.com) website in both French and English has been designed to work equally well on mobile and PC, and has the answers to all your questions.

A dedicated space allows to pre-register for tastings from early December through to 12 March.

Once your registration is validated, you will receive your badge by email. You can print it in advance, saving time at the entrance to tastings.

A list of exhibitors will be uploaded and updated as they sign up for the event.

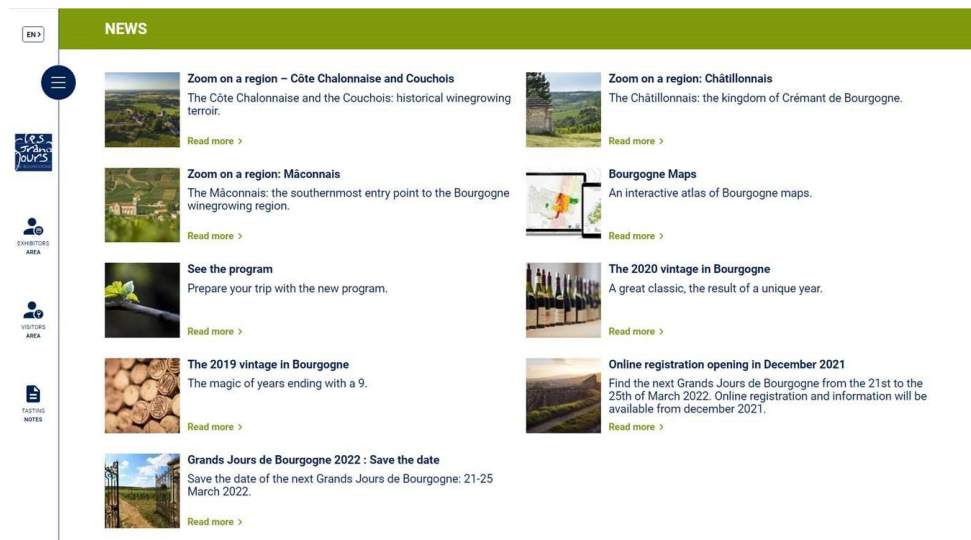


Visitors can search by appellation, event, export country, and so on, and then print the results in advance of the show.

The “Useful information” section provides you with all the information you need to prepare for your trip. In just a few clicks, you can access different sections full of information on a wide range of subjects such as glasses, badges, and shuttles, along with accommodation information.



The “**News**” section helps keep you up to date with changing protocols and measures put into place to protect the health of participants.



## Services available at the event

### Free shuttle busses to help you get around and limit the environmental impact of the event

A fleet of shuttle busses will be available for visitors from Tuesday to Friday, providing quick access from Beaune to the different tasting locations.

**Note:** Shuttle timetables will be available online from February onwards. There will be no shuttle buses between Chablis and Beaune.



© BIVB / Image & Associés

### Print your badge and save time

For a more efficient service and to facilitate getting around the event, visitors can print their badges in advance for faster access to tasting. Badges can also be printed off from terminals at the entrance of each tasting location to help attendees save as much of their precious time as possible.

### A digital business card for better networking

A personalized QR code on visitor badges makes it simple to share contact details. Simply scan the code with a smartphone to instantly download the wearer’s info.

Each exhibitor will also have a personalized QR code on their stand. Visitors can easily scan the code to access the exhibitor’s webpage, find their contact details, and see a complete list of the wines they are presenting.

### **NEW FOR 2022:** An app to replace tasting notebooks

The app can be used to record tasting notes, either via voice recordings or text input, to store photos, and to register the contact details of different producers. This personalized digital tasting notebook will centralize all your data, and once the data is downloaded, it can also be used offline.



### The Roadbook: Your guide for the week

This pocket-sized notebook in French and English will be available at the entrance of each event and can be downloaded from the website. It contains all the information you need for the entire week, and you can also use it to take notes.

#### It contains:

- The times of all the shuttle buses each day
- Access maps for the tasting locations complete with GPS coordinates
- The number of exhibitors and the wines they will be presenting
- The location of all the press rooms
- A detailed program of all the tastings
- Details on “By Night” tastings



### The press room: Open from 9am to 5pm

This space, only for the journalists, offers a range of services, including:

- Internet access
- PCs
- Areas for interviews
- Local and national newspapers and other documentation
- Pastries, coffee, and other refreshments

The BIVB’s press attachés will be on hand to answer your questions and organize meetings and interviews with winegrowers and industry professionals, and to provide information about the event.

## Our valued partners

The Bourgogne Wine Board, the Bourgogne-Franche-Comté region, the departmental councils of the Côte-d’Or, Saône-et-Loire and the Yonne, Crédit Mutuel, and our newest partner, Zwiesel Glas, all sponsor this event, which enjoys international reach, and are delighted to be supporting this 16<sup>th</sup> edition of the Grands Jours du Bourgogne.



**#grandsjoursdebourgogne**  
**www.grands-jours-bourgogne.com**



## A quick look at how things are progressing on the sites

Bourgogne, November 21, 2021

Since construction began last spring, the three projects of varying lengths and scope have made good progress. Now that the foundations have been completed, the structural work is continuing and the silhouettes of the future buildings are gradually taking shape.

### ► Progress of the worksites in Beaune, Chablis and Mâcon

#### The worksite in Beaune:

This innovative work, for which the Beaune City Council is the project manager, will cover 5,000 m<sup>2</sup>, including 3,600 m<sup>2</sup> of interior space. It will be the largest and most spectacular of the three buildings.



After completing the foundations, the first sections of the curved concrete walls leading from the hall of the future spiral to the scenographic space were built. This was followed by the triple-level walls which are almost 8 meters high. Its white-tinted facades were poured in one go and will form the periphery of the base. A few weeks ago, the prefabrication of the hemp concrete insulating modules began. The next step will be the installation of the roof structure.

#### An eco-sustainable construction, led by the Rougeot Group:

- The use of bio-composite materials such as hemp concrete for the construction of the tendril. This plant-based natural insulator, produced in France and supplied in bulk (to avoid the use of plastic materials), will provide excellent energy efficiency and comfort of use while reducing the environmental impact of the building.
- The use of noble materials such as wood which will be present throughout the building.
- Rainwater recovery
- Renewable energy production: geothermal and photovoltaic
- Outdoor vegetation above the scenographic platform with wine stocks planted



## The worksites in Chablis and in Mâcon:

These two sites, for which the BIVB is the project manager, will be smaller in size. Unlike Beaune, which is a new building, those of Chablis and Mâcon will be based on existing buildings, to which an extension will be added to provide a total of 800 m<sup>2</sup> in Chablis and 1,600 m<sup>2</sup> in Mâcon.



As for the work, the first stages were devoted to the demolition and/or rehabilitation of the existing interior spaces as well as to the preparation of the foundations for the future extensions. The first sections have recently been completed in Mâcon. The ones in Chablis are expected soon.

### ► Next steps regarding the worksites are as follows

#### End of 2021:

- Completion of the transformation of the existing buildings and continuation of the structural work
- Design of the audio-visual contents of the three scenographic tours

#### 1<sup>st</sup> half of 2022:

- Continuation and completion of the exteriors
- Scenographic and interior design, production of audio-visual devices for the scenographic tours

#### 2<sup>nd</sup> half of 2022:

- The three sites will be successively inaugurated with a total opening in March 2023



Follow the Cité's progress on [www.cite-vins-bourgogne.fr/en/](http://www.cite-vins-bourgogne.fr/en/) et   

**Contact:** Chloé Butet - Communication Manager - 06 49 43 44 39 - [chloe.butet@citeclimatsvins.com](mailto:chloe.butet@citeclimatsvins.com)



CLIMATS DU VIGNOBLE  
DE BOURGOGNE  
PATRIMOINE MONDIAL



Organisation  
des Nations Unies  
pour l'éducation,  
la science et la culture



Les Climats du vignoble  
de Bourgogne  
inscrits sur la Liste du  
patrimoine mondial en 2015



©Aurélien Ibanez

## The Climats du Vignoble de Bourgogne – a UNESCO World Heritage Site

*On 4 July 2015, the Climats du Vignoble de Bourgogne were added to UNESCO's prestigious World Heritage List as cultural landscapes, or "combined works of nature and of man". The listing reflects the Climats du Vignoble des Côtes de Nuits et de Beaune's status as a model for terroir winegrowing. It also takes into account the cultural and heritage elements embodying this 1,000-year-old history of wine production. As such, it is culture, savoir-faire, and heritage of the winegrowing villages and historical centers of Beaune and Dijon that have been recognized by UNESCO.*

*Since the listing, our association has had a mission to protect, promote, and raise awareness of this exceptional region through a range of efforts and a management plan for the territory drawn up in partnership with the state, local authorities, and professionals from the world of wine.*

The Hospices de Beaune charity wine auction is a powerful expression of the founding values of the Bourgogne winegrowing region and the Climats du Vignoble de Bourgogne World Heritage site. It is also a fabulous opportunity to shine the spotlight on the region in all its diversity, whether historical or contemporary, physical or intangible. The protection and promotion of the heritage that the *Climats* represent is at the heart of our mission to encourage the restoration of historical buildings, to better understand their architecture and components, and to bring to life the know-how that surrounds them, as well as to capture and share an oral heritage. That is also what the *Climats* represent – an exceptional testimony of a living cultural tradition.

## The Hospices de Beaune & the *Climats*: A very close connection

### A key heritage element in the UNESCO dossier

The Hospices, also known as the Hôtel-Dieu, is not just an exceptional architectural gem. It also represents a unique legacy from a charitable establishment founded on a winegrowing estate. Across the almost 60 hectares of vines making up the Hospices estate are *Climats* with reputations that date back over centuries.

The public Hospices de Beaune wine sale is also an integral part of the World Heritage listing, as part of its intangible heritage. It is the world's oldest and most famous charity wine auction, and has, since its creation in 1859, perpetuated the charitable efforts of the Hospices founders, Nicolas Rolin and Guigone de Salins.

### A partner in the inventory of the town's network of cellars

The network of cellars hidden beneath the towns of Beaune and Nuits-Saint-Georges are fascinating, but also greatly unexplored. The Association des Climats du Vignoble de Bourgogne – World Heritage has just launched a pioneering project to obtain detailed scientific data on the network in order to better understand how the wine industry was organized and the related heritage. An initial study was undertaken in the summer of 2021 with the Hospices de Beaune in partnership with surveyors TT Géomètres Experts. The cellars were fully scanned and mapped in 3D, which will result in a precise map and 3D model. These tools will serve to build a methodology to inventory the entire network of cellars in Beaune et Nuits-Saint-Georges.





## Heritage with universal appeal



### RESTORING WINEGROWING HERITAGE

#### 150 projects financed and 5km of walls restored in three years

The low walls, *cabottes* or vine workers' huts, *clos* gates, stone steps, and calvaries mark the identity of the landscape of the Climats du Vignoble de Bourgogne. They also serve a very useful purpose for winegrowing and preserving diversity. These 220 km of low walls mark out the *Climats* and play an essential role in the fight against soil erosion. When they are made of dry stone, they also provide valuable shelter for fauna and flora.

The Heritage Fund, created in 2018, has already supported around 150 restoration projects and trained more than 150 students and interns in dry stone walling. This fund is financed by foreign patrons and provides financing of up to 50% of the cost of the work with a maximum budget of €25,000 per site. This is an exceptional mechanism because no other state or local subsidy supports heritage restoration by winegrowers. There are two or three calls for projects each year, and any landowner

within the site can apply, provided they meet certain criteria, including the use of traditional dry stone or lime mortar techniques.



### COLLECTING ORAL TESTIMONY

#### The "Paroles Vignerannes" program: Three years of recording and 44 interviews later...

For the past three years, the words of winemakers have been collected to create an oral history of those who work with vines and wines to capture the thoughts, feelings, and issues faced by the different generations. Some 44 interviews have been carried out by ethnologists from the Maison du Patrimoine Oral de Bourgogne, in partnership with the Direction Régionale des Affaires Culturelles (DRAC).

Excerpts from the first interviews collected were included in the "Paroles Vignerannes" audio exhibition that moved across the Côte from 2018 to 2021. It included discussions about the difficulties of handing down knowledge from generation to generation, how vine cultivation is changing, and the impact of climate change. A series of 11 aperitif-debates were also held to enrich the discussion.

**The project is now entering a phase of analysis** to define new areas of exploration

and fresh content for new exhibitions, artistic creation, and a second round of interviews. Thanks to its **scientific vocation**, this collection of some 60 hours of interviews has also been made available to researchers.

## The Climats – A World Heritage site at the heart of the Bourgogne region's wine tourism revival

The inclusion of the Climats du Vignoble de Bourgogne on the UNESCO World Heritage List was one of the triggers for the creation of the Cité des Climats et Vins de Bourgogne. The listed area will naturally be at the heart of the content of the future Cité in Beaune. Our association is a member of the steering committee, and as such, will be offering its expertise and actively participating in the development of the museography and scenography of the future visitor experience, in particular with regard to the space set aside for the World Heritage site.

The future Cité Internationale de la Gastronomie et des Vins in Dijon will also be dedicating a special place to the *Climats*. Furthermore, 2022 will also mark the 85<sup>th</sup> anniversary of the Route des Grands Crus de Bourgogne, and we will be coordinating a program of events to celebrate this legendary itinerary.

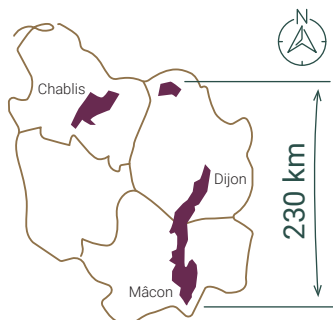
PRESS CONTACT: Association des Climats du Vignoble de Bourgogne – World Heritage  
Delphine Thevenot-Martinez / [communication@climats-bourgogne.com](mailto:communication@climats-bourgogne.com)  
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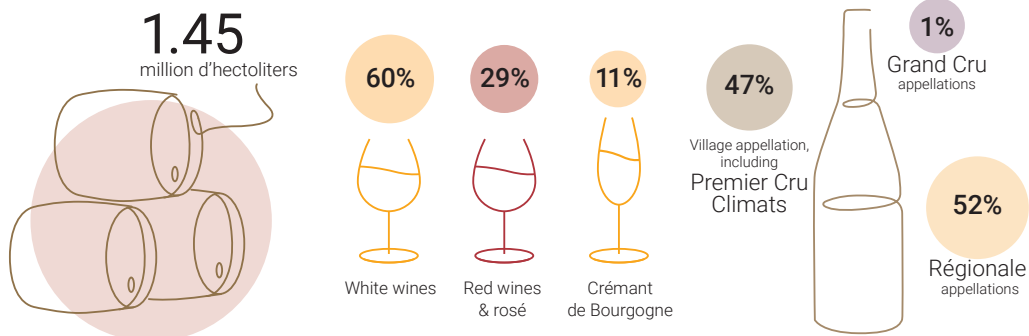
# BOURGOGNE WINES

## KEY FIGURES

### The Territory

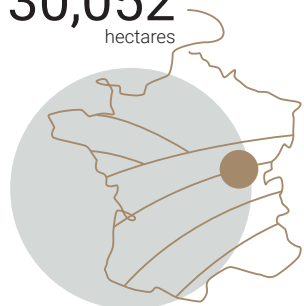


### Average Production \*

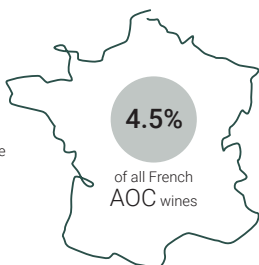


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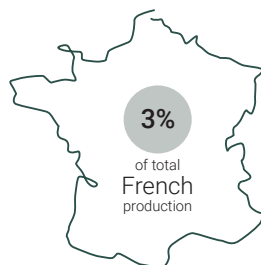
hectares



4.5% of all French AOC wines



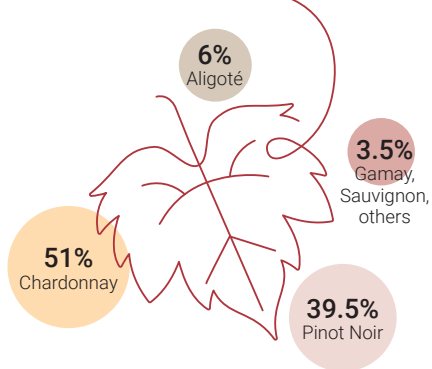
3% of total French production



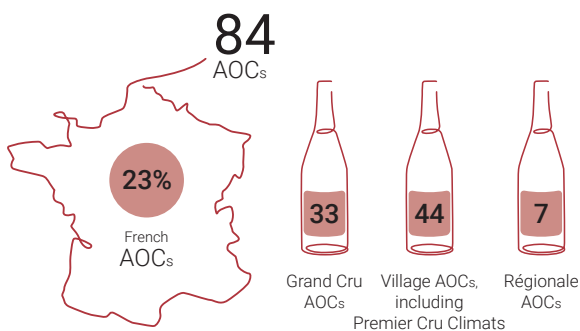
0.5% of World wine production



### Varietals



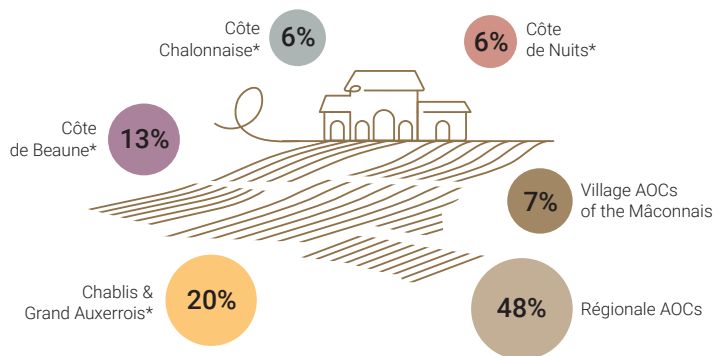
### Appellations



### Average size of an estate

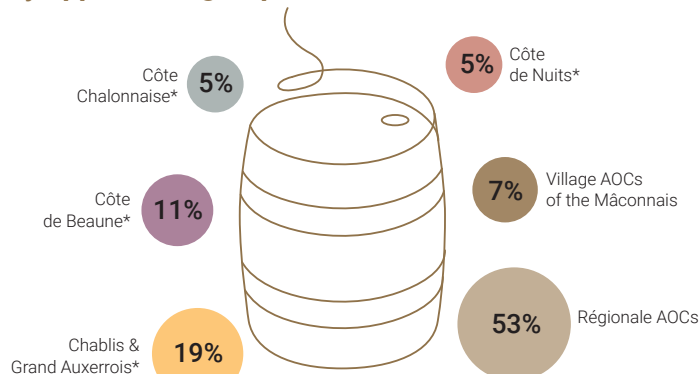


### Area under production by group of appellation



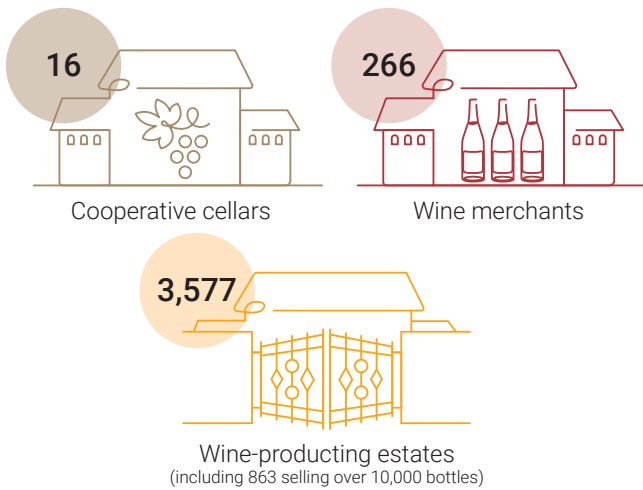
\*(Village, Village Premier Cru and Grand Cru AOCs)

### Production by appellation group

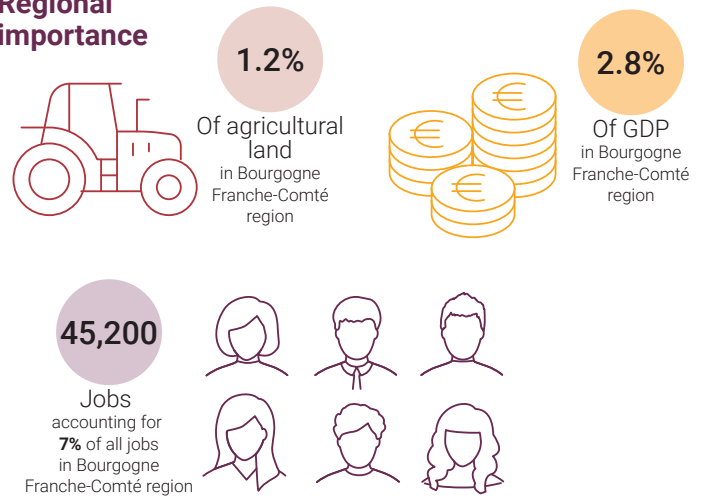


# BOURGOGNE WINES KEY FIGURES

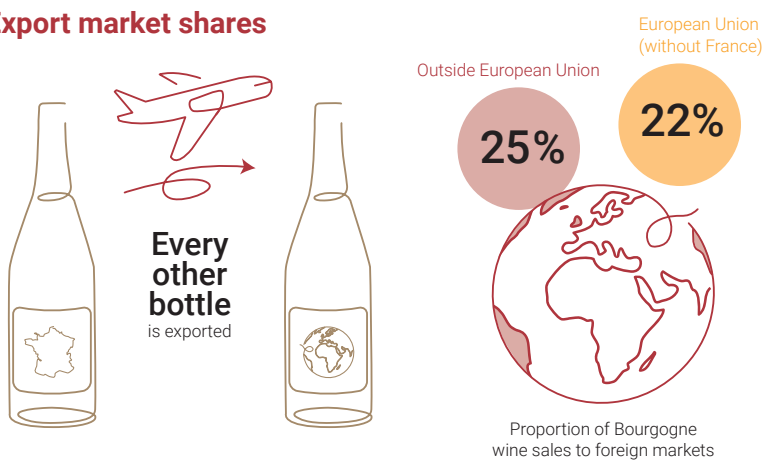
## Businesses



## Regional importance



## Export market shares

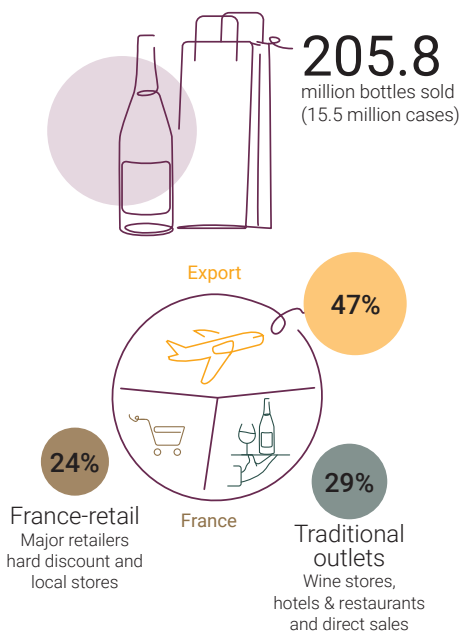


## Leading export markets

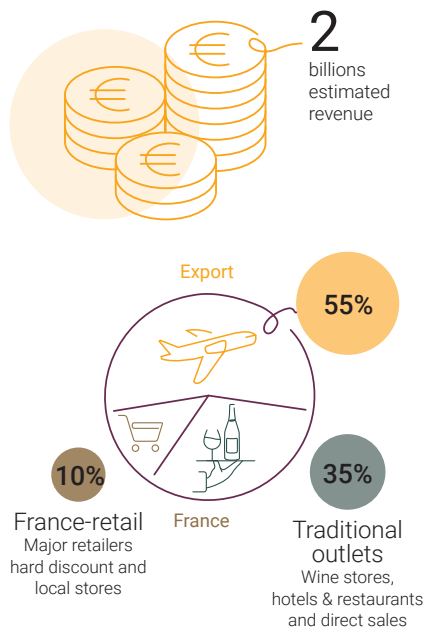


## The Market

### Spread of Bourgogne wine sales



### Turnover breakdown



### Share of Bourgogne wines on the export market

