21-25 mars 2016

Le rendez-vous des vins de Bourgogne au cœur de leurs terroirs

The Bourgogne wine event at the heart of their terroirs

Press Pack

ÉDITION N° 13
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Grands Jours de Bourgogne, 21 to 25 March 2016
A rendezvous with Bourgogne wines at the heart of their terroirs

The Grands Jours de Bourgogne began in March 1992 and have taken place every two years since then. This international gathering allows market influencers and journalists from around the world to meet with Bourgogne wine producers in the very heart of the vineyards. That is what makes it unique, and also what makes it so very popular.

Over a period of five days of intensive tastings, attendees to the Grands Jours can explore the whole Bourgogne winegrowing region, through 14 events in 11 different locations. On the Monday, the event covers Chablis/Grand Auxerrois, Tuesday it visits the Côte de Nuits, followed by Wednesday’s trip to the Mâconnais, Thursday’s stops on the Côte Chalonnaise, and wrapping up with the Côte de Beaune on the Friday.

Visitors will be tasting the 2014 vintage, along with some older wines, and business will be a key part of the proceedings, but it’s also about a passion for wine and meeting those who make it. 2,500 market influencers have registered for this year edition, of whom 1,000 who will join for the very first time).

With improved organization year-on-year, this 13th edition is not to be missed, and will allow all participants to add to their Bourgogne region address books.

What are the Grands Jours de Bourgogne?

A key event that brings people together...

This unmissable industry rendezvous provides the opportunity to meet more than 1,000 winegrowers and to discover around 10,000 wines in the space of just five days. Some 2,400 visitors attended the 2014 edition, coming from 51 countries.

Attendance has constantly climbed over the years: 2,500 market influencers have signed up for this 13th edition, including 1,000 who will be attending the event for the first time. 39% of visitors are French, and the remaining 61% come from 56 different countries.
A survey of attendees from the 2014 edition revealed that 91% were satisfied with the overall organization, and 99% are ready to return in 2016.

The industry is keen to show off the region to the world through events organized in the heart of the vineyards, estates, and producers who have made its reputation.

The Association des Grands Jours de Bourgogne was created in tandem with the second edition of the event in 1994.

A direct off-shoot of the Bourgogne Wine Board (BIVB), but legally and financially independent, the Association has a great deal of flexibility. Its board of directors, presided by Raphaël Dubois, is composed of many professionals who have steered numerous initiatives and who ensure the event grows and evolves from year to year.

Key partners

The BIVB, the Conseil Régional Bourgogne Franche-Comté, Chef & Sommelier, and Crédit Mutuel are all partners of the event. The Conseils Départementaux of the Côte-d’Or, Saône-et-Loire and the Yonne also support this event, which enjoys an international reach.
An international reach

Importers (26% of visitors in 2014), wine store owners (24%), restaurateurs (14%), sommeliers (8%), journalists (8%), and distributors (3%), along with the rest of the wine industry will be gathered in the five Bourgogne winegrowing regions to pick out, through multiple tastings, those wines that will delight consumers around the world over the next few months and years.

Visitor profile for 2014

Summary of the 2014 edition

- More than 2,400 visitors, up 9% over 2012 (2,500 in 2016)
- Over 12,200 entries across all sites
- 45% more new registrations compared to 2012 (in 2016, 40% new visitors)
- Participants hailed from 51 countries. 56 countries will be represented in 2016, with the bigger audience from Italia, Belgium, USA, Germany, Japan and Great Britain.
- 950 exhibitors from the Bourgogne wine region (1,020 in 2016)
# The Press Room

**Open from 9:00am to 5:00pm**

The press room is mobile and will be available every day at one event. **It offers a wide range of services in very pleasant surroundings:** Internet access, computers, local and national press, drinks, and snacks...

The BIVB’s PR team will be at your service to organize meetings and interviews with the region’s wine producers.

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<td><strong>Maison des Vins de Chablis et du Grand Auxerrois</strong></td>
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<tr>
<td>Les Portes d’Or de la Bourgogne / Maison des Vins de Chablis et du Grand Auxerrois in Chablis</td>
<td><strong>136 exhibitors</strong></td>
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<tr>
<td>Nuits-Saint-Georges et ses Climats / Maison de Nuits in Nuits-Saint-Georges</td>
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<td>De Chambolle à Morey / Maison de Nuits in Nuits-Saint-Georges</td>
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<td>Symphonie Mâconnaise / Palais des Congrès in Beaune</td>
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<td>Au Cœur de la Bourgogne / Mercurey Cooperage in Mercurey</td>
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<td>Salon des Jeunes Talents / Château de Garnerot in Mercurey</td>
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<td><strong>Château Grancey (opposite the Maison Latour winery in Aloxe-Corton)</strong></td>
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<td>Terroirs de Corton / Cuverie Maison Latour in Aloxe Corton</td>
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<td><strong>81 exhibitors</strong></td>
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What’s new for 2016

Two new appellations: Saint-Romain and Monthélie

- **Saint-Romain** will be represented at the *Quintessence* event, on the Friday

  The appellations of Beaune, Savigny-lès-Beaune, Aloxe-Corton, Chorey-lès-Beaune, Ladoix and Pernand-Vergelesses will come together at the Palais des Congrès in Beaune for the Quintessence tasting. They will be joined by the winemakers of Saint-Romain, who will be participating in the Grands Jours de Bourgogne for the first time.

  Located just a few kilometers from Beaune, **Saint-Romain** is one of the most ancient villages in the region. Surrounded by steep cliffs and a rocky spur, the Saint-Romain appellation represents 100 hectares of vines, of which 55 hectares are Chardonnay and the rest are planted with Pinot Noir.

- **Monthélie** is now part of the *Quatuor Inédit en Côte de Beaune* tasting on the Friday

  The appellations of Volnay, Meursault, and Auxey-Duresses will be welcoming the winemakers from the Monthélie appellation. This tasting is now known as Quatuor Inédit en Côte de Beaune, and will be held at the Damy Cooperage in Meursault.

  *Monthélie is a charming village located between Volnay and Meursault. It covers 183 hectares planted with Chardonnay and Pinot Noir, 43 of which are dedicated to Appellations Régionales, 100 to Appellations Villages, and 40 are Appellations Premiers Crus.*

A more balanced week

- **Tuesday (Côte de Nuits):** These tastings will now be held in three sites instead of four. The exhibitors from *De Chambolle à Morey* will be joining those from *Nuits-Saint-Georges et ses Climats* at La Maison de Nuits.

- **Friday (Côte de Beaune):** The *Quintessence* and *Pommard Rime avec Art* tastings will be held in two distinct tasting areas at the Palais des Congrès in Beaune.

Share your thoughts with #BourgogneGJB

Use the #BourgogneGJB hashtag and your tweets will appear on a feed on the [www.grandsjoursdebourgogne.com](http://www.grandsjoursdebourgogne.com) homepage. That way, you can share your impressions of the tasting with other attendees. This constant information flow from the week’s events will ensure you don’t miss a thing, and that we can receive your feedback live.
An always-on connection

Relay antennae will be broadcasting free Wi-Fi at every event so you can stay on top of your email and can access our mobile site. Faster connection speeds will be available to journalists in each of the press rooms.

An improved shuttle service

As in previous years, a shuttle service will be transporting participants to each tasting event from Beaune (excluding Chablis).

**New for 2016:**

**Destination information:** To reduce waiting times and help offer a more fluid service, there will be different waiting points for each destination at the various shuttle stops. The shuttles will thus be able to adapt according to demand.

Frequency of the shuttles: approximately 15 mn.

**Shuttles in Chablis:** To facilitate access to the *Les Portes d’Or de la Bourgogne* tasting (Monday in Chablis), shuttles will run continually between the parking lot of Chablis College and the Maison des Vins de Chablis et du Grand Auxerrois (Petit Pontigny). It will take just eight minutes to go from this large parking area to the tasting location, and the route will also be marked out with signposts for those who would rather walk (around 15 minutes).

*Please note that you must get to Chablis under your own steam.*

*There will be no transportation provided between Beaune and Chablis on Monday.*

For your safety and convenience, shuttle busses will be providing a quick transportation service from Beaune to the different tasting locations.

OUR AIM

To ensure a growing number of visitors can enjoy the event while limiting its impact on the environment.
New tools for you

www.grands-jours-bourgogne.com (in French and English)

This comprehensive website explains the concept of the Grands Jours de Bourgogne and includes a detailed program of the 2016 edition.

- **Exhibitors**
  Search for exhibitors by name, by wine, by date, or by event, using the site’s powerful search engine.

- **Video**
  Triggering memories for some, and a sneak peek for others, you can relive the Grands Jours experience through our new video on the site’s homepage.
A mobile site in French and English providing all the information you need, wherever you are!

Plan your day and obtain all the key information you need, right from your smartphone:

- **News**
- **Program**: Information about each day’s different events, with links to Google Maps.
  Click on “How to get there” for GPS instructions.
- **Exhibitors**: Sorted by date, by wine, or by event. Here, you can find full contact details of all participating winemakers, cellars, and négociants, as well as the appellations they are offering.
- **Shuttles**: Maps, times, frequency, and routes, to facilitate your trips.
- **Press room**: Information about the different press rooms for each day, with itineraries and opening times.
  Click on “How to get there” for GPS instructions.
- **Notebook**: Record your thoughts on your tastings and meetings. Each note is instantly forwarded to your email account.
- **Practical information**: Also available on the website, including accommodation, where to eat, etc.
- **Partners**: Information about our partners: Chef & Sommelier, Crédit Mutuel, Conseil Régional de Bourgogne Franche-Comté, the Conseils Départementaux of the Côte-d’Or, Saône-et-Loire, and the Yonne, and the BIVB.
The Road Book: Your guide to the event

The Road Book is a pocket-sized pamphlet in French and English that includes all the essential information you will need for the week.

You can download it from the Grands Jours website, or pick up a copy at any of the events.

Handy info for each event:

- Shuttle times and routes
- Maps of each tasting location with GPS coordinates
- Buffet times and locations
- Number of exhibitors and appellations on show
- Press room locations

Your daily tasting guide

A pocket-sized notebook to make things simple, this practical guide offers:

- A numbered page per exhibitor, organized in alphabetical order and by event
- Full contact details for each business and the wines on offer
- A space at the bottom of each page for your personal notes
Professional tasting glasses

The Chef & Sommelier brand has partnered the event for the past nine editions, and allowed the organizers to lend visitors their stemware specially designed to underscore the aromas of the wines - perfect for every tasting!

For the 2016 edition, the tastings will be enjoyed in the Oaky and Fruity glasses from the Arom'Up collection.

Chef & Sommelier is the professional brand of the Arc International group, and has built up significant enological expertise over the years. The glasses are made in France from Kwax®, a revolutionary glassmaking material.
Economic situation

After two good harvests, Bourgogne wines are well positioned to reconquer market share

After two small harvests in 2012 and 2013, which slowed the dynamism in certain markets without affecting the good pricing point for its wines, the Bourgogne wine region is looking to the future with confidence. It is driven by the quality of its production and by the 2014 and 2015 vintages, which saw volumes recover (> 1.5 million hectoliters), leaving the region well placed to meet growth in demand. The Bourgogne wine sector is today positioned to reconquer market shares, in an international economic context which nonetheless remains tense.

The people of Bourgogne are naturally prudent. They know how to keep their feet on the ground in favorable circumstances, just as they are able to face hard times. This characteristic is a precious asset to getting back on the road to growth. There are numerous initiatives throughout the region to develop wine tourism, and this is another factor with great promise. The inclusion of the Climats of the Bourgogne wine region on the UNESCO World Heritage List in 2015 confirmed the surge of interest in Bourgogne wines. It should encourage greater visitor numbers and, like the future Cités des Vins de Bourgogne, will bolster economic growth in the region.

After the excellent 2014 vintage, the advance trade market has reached a balance between available volumes and demand.

In foreign markets, the Bourgogne wine region set a new record in terms of revenue in 2015, with nearly 777 million euros (up 5.5% compared to 2014), confirming the strong pricing for its wines. That said, volumes exported fell back slightly (down 1.9% - source: Customs), due to low production volumes in previous years.

In France, 2015 volume sales in the supermarket sector slipped back 1.1%, affected by the lack of volumes. In terms of revenue, sales to the sector were up 2.2%.

Bourgogne wines remain a firm fixture on traditional circuits. They are present on the wine lists of 64% of French restaurants, showing a slight increase in penetration (source: CHD Expert). They are widely appreciated and enjoy a high-end positioning with specialist wine stores, where the low availability has had less of an impact than it has on higher volume markets.
Advance trade market: In a phase of equilibrium

Transactions in the first five months of the 2015/2016 campaign from August to December across all vintages stabilized compared to the same period in 2014/2015, which was affected by a sustained need for wine after several years of low-volume harvests. Since stocks were at very low levels, they had to be built up again, and the volume and quality of the 2014 vintage allowed this to happen. The current campaign has thus returned to levels of transactions in line with the average, the balance between available and market needs having reached the optimum. The first half of 2016 showed an increase in transactions, driven by the quality of the 2014 and 2015 vintages.

Transactions for all vintages of Bourgogne wines over the two last campaigns plus five-year average (Source: BIVB)

2015 harvest: Volumes return to normal

With a total yield of 1.514 million hectoliters in 2015 (equivalent to almost 202 million 75cl bottles), Bourgogne wine production was at a normal level, in line with the five-year average before the three low-yield vintages of 2010, 2012 and 2013. On top of the healthy volumes produced in 2014 (1.577 million hl), this puts the region in a strong position to reconquer some lost market share.

The 2015 harvest broke down as follows:
- 389,000 hl of red wine (down 16% on 2014)
- nearly 975,000 hl of white wine (up 3% on 2014)
- 150,000 hl of Crémant de Bourgogne (down 12% on 2014)
Export: Record revenues

The Bourgogne wine region derives 50% of its revenue from exports, across 178 territories.

The export sector is still hamstrung by the low yields in 2012 and 2013, respectively 1.27 million hl and 1.3 million hl, whereas the average over the past five years is around 1.42 million hl and a “normal” harvest yield is around 1.5 million hl. Export volumes are, however, tending to stabilize, down just 1.9% to 79.54 million bottles last year, after a sharp drop of 12.8% in 2014 (source: Customs).

The quality of Bourgogne wines, which command a high price in foreign markets, allowed the sector to set a new record in 2015 at nearly 777 million euros, up 5.5%.

Exports of Bourgogne wines 1998 - 2015
(Source: Customs - BIVB)

This progress in terms of value is explained by the shift in sales towards markets that skew more towards premium and super-premium appellations. Since 2009, the Bourgogne wine region has lost ground in certain markets which were seeking volume, and which were tricky in terms of pricing (notably Germany, Sweden, Belgium and the United Kingdom). At the same time, the low volumes of red wines available led the region to concentrate efforts on the market for whites.
Export is currently driven by white wines

With near-stability in export volumes in 2015 (down 0.6%), the performance of the Bourgogne wine region in foreign markets continues to be carried along by white wine sales. These accounted for 68% of the volume exported (52% in terms of value). Some 40% of white wines sold on the export market are Chablis appellations (37% of the revenue). The growth in Bourgogne white wine sales is particularly impressive in the USA, Canada and the United Kingdom. The American market was driven by the Chablis and Petit Chablis AOCs, Village AOCs from the Mâcon region, and white Régionale AOCs (Bourgogne and Mâcon). The Chablis and Petit Chablis AOCs alone have revitalized the markets in the United Kingdom, Sweden and Denmark.

Growth of exports of white Régionale AOCs 2015 / 2014
(source: Customs - BIVB)
The drop in production has penalized red wines

The low availability has impacted Bourgogne red wines in foreign markets. The fallback in export volumes (down 6.6%) was, however, compensated by a shift towards higher-value markets. In fact, while red wines accounted for only 25% of bottles exported, they made up 44% of the Bourgogne wine region’s export revenues. This strong performance is mainly down to Village and Premier Cru appellations from the Côtes de Beaune and Côtes de Nuits, which are in high demand in some growth markets (USA, Hong Kong, etc.). As such, more than one in five bottles of red wine exported is sold in the United States (21.6% of Bourgogne red wine exports).

Crémant de Bourgogne remains dynamic

In a particularly competitive yet lucrative global market for sparkling wine, Crémant de Bourgogne is faring well. Sales were slightly down on 2013, the record for the region’s bubbly, but export volumes nonetheless grew 4% in 2015 (compared to 2014), exceeding 5 million bottles. The USA and Sweden were the two leading markets for Crémant de Bourgogne, which is also gaining ground in Canada. Crémant de Bourgogne accounted for 7% of sales by volume and 3.7% of revenue of the Bourgogne wine region, and year-by-year is carving out a place as a promising vector of growth for the region’s exports. The appellation’s growth has not been impacted by the lack of available volumes in recent years, given the growing market for sparkling wine.
United States, Canada, the United Kingdom and Hong Kong; the four export frontrunners

The Bourgogne wine region traditionally has a strong presence on the international marketplace, and its wines are sold in some 178 territories. Volumes exported are evenly spread between the countries of the European Union (49%) and the rest of the world (51%).

2015 was notable for strong growth in sales to the USA, where volumes climbed 9%, while revenue jumped by 15%. The United States is now the leading export market for Bourgogne wines both in terms of volume (20% of total exports), and by value (23.3%). The United Kingdom is in second place (19% by volume and 15.5% in terms of value), ahead of Japan (10% by volume and 12.8% in terms of revenue). These three markets accounted for almost half of all bottles exported (49%), and 51% of export revenue.

United States, #1 export market for Bourgogne wines (20% of volume and 23% of revenue)
The market was driven by Régionale white appellations, Bourgogne and Mâcon. The other segments (Village, Premier Cru and Grand Cru white AOCs) also grew by 12%, while red wines were stable, up 0.9%. Crémant de Bourgogne posted strong growth of 21%. Many states are showing a growing appetite for the lesser-known Bourgogne appellations, which offer excellent value for money.

The United Kingdom, 2nd biggest export market in terms of value for Bourgogne wines (15%, accounting for 20% of export volumes)
The UK market has largely recovered, driven by the strong growth of Chablis and Petit Chablis, especially on the supermarket circuit. The traditional circuits (specialist stores, restaurants, online sales) showed strong demand for Premier Cru and Grand Cru wines. These circuits are a natural for Bourgogne wines, since customers are looking for quality and diversity.

Canada, 4th biggest export market in terms of value for Bourgogne wines
(5%, accounting for 7% of export volumes)
Reputed for the quality of its wines, the Bourgogne wine region showed growth across all segments, especially for white wines, from Régionale to Grand Cru appellations. The only struggling area was Grand Cru reds, which were less present since those states which operate a monopoly are mainly looking for appellations which offer large volumes in the lower price range.

Hong Kong, 5th biggest export market in terms of value for Bourgogne wines
(5%, for 1% of volumes)
This market posted the strongest growth in 2015, up 19% by volume and 65% in terms of revenue. The market’s dynamism was boosted by government policy to stimulate the economy, which has seen sluggish growth in recent years. Hong Kong is also a platform for “re-exports” to elsewhere in Asia. Premier Cru and Grand Cru wines were particularly sought-after in this market of wine-lovers and collectors.
Evolution of exports of Bourgogne wines to the 10 top destinations from January to December 2015
Bubbles size is proportional to sales (Source: Customs - BIVB)

**Hong Kong:**
Volume: +19%, Value: +65%

**Germany:**
Volume: -29.7%, Value: -19.4%

**Japan, Sweden and Switzerland on middle ground**

**Japan, 3rd biggest export market in terms of value for Bourgogne wines** (13%, 10% of volumes)
Sales of Bourgogne wines stabilized by volume (down 1%) and in terms of value (down 0.6%), after two years of sharp falls due to the lack of volume and Japan’s economic woes. Nonetheless, Bourgogne wine professionals remain confident that sales will pick up, since development of tourism is a core strategy of the Japanese government, which is aiming to reach 20 million tourists by 2020, when the Olympic Games will be held in Tokyo (source: BusinessFrance).
Sweden, 9th biggest export market in terms of value for Bourgogne wines (3%, for 6% of volumes)
Sales of Bourgogne wines on the Swedish market were relatively stable, down 1.1% by volume and down 0.1% in terms of value. It is hoped this slowdown will be a passing blip after a decade of strong growth: Bourgogne wines sales in Sweden surged from 1 million bottles in 2004 to 4.4 million in 2013. In this context, certain AOCs nonetheless performed strongly, notably the wines of Chablis (up 11% by volume and 6.5% in terms of value) and Crémant de Bourgogne (up 3.3% by volume and 7% in terms of value).

Switzerland, 7th biggest export market in terms of value for Bourgogne wines (2%, for 4% of volumes)
This long-standing market is tending towards the premium end, with Grand Cru (both white and red) and Premier Cru wines showing steady growth. Village, Premier Cru and Grand Cru white AOCs from the Côte de Beaune and Côte de Nuits saw a 26% leap in revenues. In parallel, the Petit Chablis and Chablis AOCs recovered market share, with a 35% hike by volumes in 2015.

China, Germany and Belgium treading water

China, 12th biggest export market in terms of value for Bourgogne wines (2%, for 2% of volumes)
After several years of growth, China imported fewer bottles in 2015 (down 9% on 2014). However, Bourgogne wines sell for good prices there, which meant revenue was nonetheless up by 11%. The overall slowdown in the Chinese economy is not expected to have a major impact on the Bourgogne wine region, since China remains a small market accounting for just 2% of sales in terms of both volume and value.

Belgium, 6th biggest export market in terms of value for Bourgogne wines (5%, for 8% of volumes)
From 2000 until the economic crash in 2008, Bourgogne wines had been making steady progress on this market, up 11% by volume and 13.6% in terms of revenue. But since 2009, exports fell back, mainly due to a drop in sales of the Chablis and Régionale appellations. The slide continued in 2015, which saw a drop of 11% in both volume and revenue. However, the overall market for still wine in Belgium remains more or less stable by volume (down 1.1%) and has only dropped by 3.1% in terms of revenue. The market for French wine is hard-pressed, notably due to wines from outside Europe which are enjoying a boom, such as South African and Chilean wines. There is one unknown in this picture: The volume of Bourgogne wine purchased directly in France, or even in the Bourgogne wine region, by Belgian tourists. They account for the most foreign visitors to the region.

Germany, 8th biggest export market in terms of value for Bourgogne wines (4%, for 5% of volumes).
In the 2000s, Germany was among the five main markets for Bourgogne wines, in terms of both volume and revenue. In 2004, exports of Bourgogne wines fell, largely due to a drop in sales of Chablis and Régionale appellations. Since then, Germany has not recovered its place. After a strong recovery in 2014 (up 9.8% by volume and 17.2% in terms of revenue), the market fell back again sharply in 2015 (down 29.7% by volume and down 19.4% in terms of revenue). This drop is no doubt linked to poor performance in the supermarket sector: Sales of Bourgogne wines have continued to fall on this circuit (down 12%), which is essentially structured around price and large volumes, with a bigger fall for white wines (down 27.5%).
A new kid on the block

**Australia** has been growing year after year, and in 2015 became the 14th biggest export market in terms of value for Bourgogne wines. Growth there involves everything from the high-end segment to entry-level wines (up 5.3% in terms of value over 2014). This market is driven by two main factors:

- Like many producer countries, Australia has a genuine interest for wine in general, with consumers seeking new experiences
- There is a flourishing luxury goods market in Australia, with many trade shows that attract business tourists in search of premium and super-premium wines.
### 2015 export figures for Bourgogne wines
*(source: BIVB/Customs)*

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France: Markets for Bourgogne wines stable despite the recession

The Bourgogne wine region has maintained its market share in France, where 50% of its production is sold. The traditional circuits of restaurants, specialist wine stores and direct sales accounted for 28% of total sales, while the supermarket sector accounted for the remaining 22%.

Specialist stores remain dynamic

The very wide range of wines offered by the Bourgogne wine region is particularly well-adapted to the traditional circuits of specialist wine stores and restaurants, which can diversify their supply network as they wish while at the same satisfying their clientele’s curiosity and thirst for discovery.

Between seven and 10 million bottles are sold on this circuit every year, with a very high-end positioning. In 2014 (latest figures available), 40% of specialist stores said their sales of Bourgogne wines were stable, while 33% reported an increase compared to 2013. In the end-of-year festive period alone, a time when many consumers look to buy fine wines, 36% of stores observed a rise in sales of Bourgogne wines. The most sought-after appellations are chiefly red wines: Mercurey, Givry, Pommard, Santenay, Marsannay, etc.

Bourgogne wines present on 64% of restaurant wine lists

Bourgogne wines still enjoy good positioning in the French restaurant trade, which is trying to compensate for the slowdown in selling bottles of wine at the table by developing new formulas to appeal to customers (wine by the glass, take home unfinished bottles, etc.). French restaurateurs (restaurants with table service) reported that volumes of wine sold (all origins) fell by 3.7% in 2015.

In this tough context, the Bourgogne wine region emerges as a trusted brand on this circuit. The reach of the region’s wines has continued to grow, with a presence on 64% of wine lists in 2015, compared to 63% in 2013.
In 2009, only one-in-two (53%) French restaurants proposed Bourgogne wines on their list. In 2015, things have changed significantly, with two out of every three restaurants now stocking Bourgogne wines in their cellars. The average number of wine references on wine lists (7 references on average in 2015, compared to 8.1 in 2013). However, the Bourgogne wine region still does better than the national average (5.8 wines referenced on average out of all French wine regions in 2015).

The good health of the Bourgogne wine region in this market segment is even more vigorous in the gastronomic restaurant sector, where extensive wine lists give pride of place to carefully selected quality wines and prestigious crus. On average, 13.5 Bourgogne wine references featured on the wine lists of these restaurants in 2015, compared to an average of 9.8 references for French wine regions.

**Evolution of Bourgogne wines available in French restaurants**

*Source: CHD Expert - BIVB*

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**Sales direct from the estate driven by wine tourism**

Close to one million tourists visit the Bourgogne region each year, 82% of them for the wine.

In 2014, the number of French visitors continued to decline, with a dip of 1.7% on 2013, whereas foreign visitor numbers returned to growth, up by 7.9%. The leading nationality was Belgian (19.3% of foreign tourists to the Bourgogne region, up 10.7% on 2013), followed by Germans (18.7%, up 0.5% on 2013).

Taking all tourism sectors together (2013 survey), tourists spent around 2.2 billion euros in the Bourgogne region (*source: Bourgogne Tourisme*).

In parallel to welcoming visitors to the region, Bourgogne winemakers travel to many wine fairs and trade shows throughout France. This dynamism is especially helpful for smaller structures which struggle to find their place on the higher-volume circuits.
Supermarket sector: Bourgogne wine sales hampered by lack of availability

The Bourgogne wine region covers only a small area and accounts for just 2% of the market for still wine in the supermarket sector. The lack of availability in the wake of the low harvest in 2012 and 2013 had several consequences for sales of Bourgogne wines on the shelves of hypermarkets and supermarkets, since this volume market is naturally sensitive to fluctuations in production.

After steady growth since 2008, capped with record revenue of nearly **243 million euros in 2013**, the Bourgogne wine region stagnated. But despite a 1.1% drop in quantities in 2015 compared to 2014 (21.12 million bottles sold), the region managed to grow its revenue by **2.2%** in an unfavorable context. The proportion of French households which buy wine at least once a year is now only 86.1% (from July 2014 to June 2015).

White wines registered a fairly sharp drop of 4%, whereas red wines were back up by 3.2% in terms of volume. These figures reflect the difficult context for all French AOC wines sold in 75cl bottles on this circuit.

Three groups of appellations fared better. Volume sales of red Régionale appellations rose by 7%, with revenue also up by 5.7%. The same trend was observed for Chablis AOCs, which were less affected by the low yields (except in 2013), and for which sales increased 5.1% by volume and 9% in terms of value. The same goes for the red Village wines of the Côte Chalonnaise, where sales climbed 3.3% by volume and 7.5% in terms of revenue.
Evolution of sales of Bourgogne wines in the French supermarket sector by appellations group, 2015 (Source: IRI - BIVB)

Bubble size is proportional to sales
The Bourgogne wine industry publishes its first report into Sustainable Development

“Far from starting from nothing, a raft of initiatives show that we are already some way down the road and the wheels are in motion. The task we face may seem colossal, but on reading this report, we should congratulate ourselves on how we have collectively embraced this issue,” said Michel Baldassini, President of the Sustainable Development Commission of the Bourgogne Wine Board (BIVB). The Bourgogne wine region has been quietly working on this subject for more than five years now. It has turned constraints into strengths in order to initiate a collective approach that is gradually driving the Bourgogne wine region towards its ambitious aim of becoming a global reference in terms of great wines produced through a sustainable approach.

A global approach based on the power of working together

One of the strengths of the Bourgogne wine region is its sustainability. It has been around for almost 2,000 years, living through different eras and different crises, and has always been able to adapt accordingly. The constraints it faces - which are part of its personality, too - mainly involve the way in which the region is divided into so many different plots operated by such a huge diversity of businesses. Indeed, this relatively tiny region comprises some 4,000 estates, négoces, and cooperatives. Sustainable Development in the Bourgogne wine region is all about adapting to this great heritage and adopting an approach that suits everyone involved.

The Bourgogne wine region has chosen to tackle the three elements of Sustainable Development head on. These include the environment, of course, but also the local economy, and local society. This approach involves seven key thrusts that have been developed into an action plan along with industry stakeholders. The Bourgogne Wine Board (BIVB) is driving this key issue, which featured back in 2011 in the Bourgogne Amplitude 2015 plan, and is further underscored in our new Bourgogne 2020 strategy. However, the Bourgogne wine region’s strategy for Sustainable Development is deliberately being seen as an issue to be dealt with collectively.
Indeed, the Bourgogne wine region was a pioneer in terms of recycling waste water. Through many projects, the first of which were launched back in the early 2000s, more than 90% of waste water from the region’s wineries is now recycled. Biodiversity is also a key issue for the region. Since it signed up to a European program on the relationship between biodiversity and winegrowing landscapes, the Bourgogne wine region has enjoyed a better understanding of the flora and fauna to be found among the vines, and is now taking care to protect it, mainly through landscaping strategies involving walls, hedges, and woodland.

In terms of the economy, there is an equally huge amount of work being done. This includes the development of practical tools to help professionals, such as those to evaluate production costs for technical winegrowing approaches and to help new winemakers evaluate the profitability of different business structures.

The Bourgogne wine region would be nothing without the men and women at the heart of these strategies. Their jobs cannot be outsourced, and they bring a unique understanding and expertise, and are thus a highly qualified workforce. To respond to this, the region is focusing on training, both on a one-off and an ongoing basis, as well as investing in cutting edge research facilities. These are just some examples among the multitude of projects currently underway that are presented in this 72-page report entitled “Sustainable Development in the Bourgogne Wine Region” (in French only), the first of its kind.

An educational tool to help adopt the strategy

It was high time to draw up a preliminary report and to highlight the industry’s commitment. “This report provides a snapshot. Above all, it offers a reality check on all the factors and people involved. [...] It includes technical, economic, and social elements. It covers all the activities involved in the production, distribution, circulation, and consumption of Bourgogne wines,” explains Claude Chevalier, President of the BIVB.

Aimed at all stakeholders, and the general public, this report enables a better understanding of the overall strategy, and allows us to evaluate the commitment of everyone involved.
It also serves to remind the Bourgogne wine region’s winemakers, cooperatives, and négociants that their work is valuable and every little helps.
The next step: Growing the movement

This report also lays the foundations for the Bourgogne wine region’s second Sustainable Development Seminar, which is being organized by the BIVB in April. Stakeholders will come together to establish what has been accomplished so far, and to reflect on future priorities and projects, and how to encourage the industry to get involved even more.

Sustainable Development is a key part of the Bourgogne 2020 plan which was adopted in December 2015. The situation is changing fast, on a territorial, national, and societal level, and time is running out, as Claude Chevalier underlines: “Tomorrow will be less about the relevance of our actions to encourage sustainable development, and more about adopting them within the context of a planetary approach.”

A printed copy (printed using vegetable inks, and FSC 60% recycled paper, printed by an Imprim’Vert printer), can be ordered from the BIVB: eve.gueydon@bivb.com
Exploring and tasting with the guide
En route vers les Bourgognes

Discover the latest edition of “En Route Vers les Bourgognes”, the essential guide to the wide choice of quality wine tourism on offer in the region. Organize a tailored program to suit you, as a couple, a family or among friends, and wind your way through the six tourist routes which stretch over 230 kilometers. The 100 Appellations d’Origine Contrôlée of the Bourgogne region are there to be discovered year-round!

The guide in figures

- 343 estates, wine producers and cooperative wineries who all adhere to the De Vignes en Caves* welcome charter
- 92 wine-related events
- Some 100 restaurants bearing the “Vignobles & Découvertes” label
- 1 pullout map of the Bourgogne wine region produced in partnership with Bourgogne Tourisme and showing the key sites. On the reverse, mini-maps detail each route
- 8 introductory themes, including “Wine”, “In a Word, the Climats”, “Varietals”, and so on
- 92,000 print run of the new edition
- 834 distribution outlets in the Bourgogne, Rhône-Alpes and Jura regions: Tourist offices, Regional and Departmental Tourist Boards, hotels, camp sites, guest houses, Lyon airport

New features

- Around 20 new illustrations enrich the brochure
- A one-page graphic presents the key figures of the Bourgogne wine region at the end of the guide
- The inclusion of the Bourgogne Climats on the Unesco World Heritage List

And as always...

- In both French and English
- Available free-of-charge on request from the BIVB and tourism points
- Can be downloaded from www.bourgogne-wines.com, in the “A trip through the vines” section
- A summary listing the regions by color, to help you quickly find the producers, festivals, wine routes and gourmet stop-overs you are looking for
Recap

The national Vignobles & Découvertes label was created in 2009 to establish a network among stakeholders in the wine tourism sector in the same region. Visitors can thereby easily identify all the activities on offer along wine routes. This label is attributed by the Ministries of Tourism and Agriculture for a three-year period. Today, six destinations are currently included in the scheme, three of which have already been renewed**, bringing together 600 label-bearing activities, including 155 wineries.

In chronological order of receiving the label:
Beaune: From Corton to Montrachet**
Dijon Côte de Nuits**
Chablis wine region**
Auxerrois wine region
Mâconnais wine region
Côte Chalonnaise

The Châtillonnais wine region is also taking the necessary steps to acquire the label in 2016.

The success of En Route Vers les Bourgognes Is down to the De Vignes en Caves welcome charter

1 This charter was created 24 years ago. Signatories commit to continually improving their welcome and the tasting experience in their cellars.

Members commit to:
- Providing a warm and individual reception (including in foreign languages)
- Advertising fixed opening hours for visitors
- Clearly displaying the sign indicating their commitment to the principles of the charter
- A free tasting of at least one wine
- 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 wine growing region and the estate

NEW: The “De Vignes en Caves” sign that members display outside their estates has been redesigned. It comes into line with an eco-responsible approach and is now reusable. Each time membership is renewed, only the tab with the current year needs to be changed, which clips in place of the old one.

#BourgogneGJB

Press pack March 2016 / page 32
The 2015 Bourgogne vintage

Simply sublime!

The grapes harvested in the Bourgogne wine region in 2015 were simply perfect. They were in tip-top health, and at optimal ripeness, a double whammy that will make this year one to remember. The wines have wonderful balance, and the vintage is characterized by abundant aromatic depth. The upbeat mood felt across the region during harvesting has been transformed into pure delight as vinification progressed and the first tastings revealed the promise of the future wines. The overall quality and exceptional concentration observed from the north of the region to the south suggest this may well go down as a legendary vintage.

Flowering started in early June, with veraison occurring in mid-July and the first grapes picked in late August, meaning everything went at quite a lick as the hot, dry weather dictated the tempo. Winemakers managed to adapt to this sustained pace and unusual conditions, bringing in some magnificent fruit which promises a great vintage. This idyllic picture is, however, tempered by the relatively low volumes of red harvested which, at times, fell below expectations.

White wines

The white wines are already very expressive, with lovely notes of summer fruits, and great aromatic purity, balanced by an impressive crispness and richness in the mouth. This harmony will please those who don’t want to wait too long before uncorking, but will undoubtedly improve with ageing.

Red wines

These are showing some intense, bright colors. The wines are bursting with aromas of incomparable complexity, with notes of red berries, and are ripe and full-flavored. The tannins are silky and rounded, a reflection of perfect maturity, giving the wines balance and elegance. 2015 promises to be an outstanding vintage that is already delicious, but which will reveal its full splendor in years to come.

Crémant de Bourgogne

In order to preserve a good balance of acidity and fruit, the harvests, which have to be carried out by hand, began at the end of August. The yields of Chardonnay and Aligoté were in line with the norm, but were more uneven for the Pinot Noir and Gamay. The vintage is characterized by very aromatic, intense and complex base wines.

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 2014 vintage has confirmed its early promise: An excellent year, with good volumes, although not enough to fully make up for the low stocks. After another unusual year in terms of weather, September 2014 lived up to its reputation for “making the wine”. The grapes produced nicely balanced wines with intense colors. The 1.58 million hectoliters harvested underlined the size of the yield, despite some disparities in certain areas, in particular due to episodes of hail that had a significant impact in plots around Lugny in the Mâconnais, and on the Côte de Beaune.

After the dormant winter period, the vines returned to life in clement, warm and dry conditions. The start of the growing cycle gave an early indication of the potential harvest, despite some incidence of shatter, when the flowers fail to form fruit.

At the end of June, the weather changed, becoming cool and damp, but ripening continued nonetheless. The return of the sun and a northerly wind – the signature of September in the Bourgogne wine region – led to ideal conditions for the vines to reach full maturity. Picking began in mid-September in a serene and sunny atmosphere, and vinification unfolded without problem. The wines, which are mostly now in the bottle, confirm that 2014 in the Bourgogne wine region is an excellent vintage.

**White wines**

**Chablisien and Auxerrois**

The Chablis Premier Cru and Grand Cru wines are particularly harmonious, intense and aromatic. Their minerality underlines a very pleasant finish, and they have exceptional ageing potential.

The other white wines from the later-ripening plots are temptingly smooth, with a refreshing touch of acidity. On the nose, they reveal some very attractive aromas of citrus and white-fleshed fruits.

**Mâconnais**

The Mâcon region generally produced some charming, generous wines, with good breadth. Their fruity and floral notes open onto a full-flavored mouthful.
Côte Chalonnaise

These very aromatic, moreish wines exhibit very good balance and excellent structure, with a nice crispness and tension. This suggests they will be well adapted for ageing.

Côte de Beaune

These quality wines have a very expressive nose, dominated by lemony and floral notes, accompanied by aromas of almond and dried fruits. In the mouth, they are already full and round. They still seem rather tightly wrapped, but which should open over time, and they have true ageing potential.

Red wines

Auxerrois

Subtle notes of red berries with a touch of spice can be found in these wines, which are soft and fleshy in the mouth. The smooth tannins make these very pleasant wines, with plenty of surprises to discover.

Côte Chalonnaise

With some particularly fruity aromas, these wines have lovely body, with remarkable sustain in the mouth, thanks to a very tight tannic structure. Their taut finish is very pleasant, and they promise to evolve wonderfully over the years ahead.

Côte de Beaune

These wines have a deep red color. They are very expressive, with intense aromas of red berries and great finesse. In the mouth, the silky tannic framework underlines their opulence and roundedness. These wines could easily be kept for good many years.

Côte de Nuits

The Côte de Nuits produced a lovely vintage, with outstanding quality across the board. From an aromatic and gustatory point of view, the wines are charming and perfectly balanced. Their soft, silky tannins underscore some full-flavored material, and they have undeniable 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 2013

An extra-ordinary vintage with some magnificent results

October 2014

Long-awaited, scarce, difficult... There were a lot of adjectives floating around to describe the 2013 vintage. And now, it is with some relief that Bourgogne wine producers can see their efforts to produce this quality vintage weren’t in vain. Although 2013 was not the highest yielding of vintages, you can be sure there are some very fine wines out there waiting for you!

The 2013 vintage was marked by a tricky spring, and characterized by production volumes around 20% lower than the average. The main reason for this was the rain and cold weather experienced during flowering. Despite a hot summer ideal for good maturity, the harvests didn’t start until the end of September and the last grapes picked mid-October. Harvesting in 2013 began later in the year than it has for a quarter of a century, but when one looks at start dates going back over history, it is not that unusual.

White wines

Chablisien and Auxerrois
Fruity and indulgent with good minerality, these whites are delicate and moreish with good keeping potential for the Premiers and Grands Crus.

Côte de Beaune
Part of the Côte de Beaune was hit by violent hailstorms on 23 July, and some vineyards saw almost all their fruit destroyed. Yields were low, but the quality is undeniable, with rich and intense aromas of citrus, apple and dried fruit, and wines that are lively and opulent on the tongue with magnificent balance and remarkable length. This is a vintage that will definitely make an impression.

Côte Chalonnaise
Acidity and maturity combine for wines that are both broad yet structured. Intense nutty notes and hints of lemon and green apple foretell astonishing richness and diversity.

Mâconnais
Low yields and optimum maturity for wines that are particularly aromatic and structured. The nose, which is marked by pleasant notes of white-fleshed fruits, apricot and citrus, is an excellent example of its type. In the mouth, they are remarkably lively and tense.
Red wines

**Auxerrois**

Although volumes were down significantly compared to averages, the quality of the wines produced was excellent.

Dominated by intense aromas of red berries mingling with floral scents, the wines are wonderfully supple on the tongue. Their soft tannins and indulgent finish make them ideal wines for drinking in the near future.

**Côte de Nuits**

Thanks to the late harvest, the grapes were picked at peak maturity.

With their intense ruby color and nose with floral, fruity and spicy notes, these wines are particularly seductive. In the mouth, they are rounded and lively before giving way to sophisticated yet sustained tannins that become firmer towards the finish.

After a few years of ageing, these wines will delight even the most demanding connoisseurs.

**Côte de Beaune**

In 2013, the Côte de Beaune yielded one of the lowest volumes for the past two decades. This was also one of the latest ever harvests for the area.

The wines have a charming nose, evoking red berries, stone fruits and light tobacco. They are ample and delicate, with a sophisticated tannic framework, yet keep their pleasing vivacity.

**Côte Chalonnaise**

These wines are looking wonderful. They are fruity and expressive on the nose, perfectly balanced in the mouth, and offer consistency and a good structure with smooth and silky tannins.

Although very pleasant in their youth, they will be at their peak in a few years’ time.

*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.*
Our Privileged Partners

The Grands Jours de Bourgogne would be nothing without the commitment of the Burgundy wine professionals (professional associations, domaines, shippers, and wine co-operatives), who for each annual event organise privileged meetings and venues for key French and foreign opinion leaders and journalists.

At the same time, the success of this event owes much to the assistance and involvement of its partners. The President, Raphaël Dubois and the Grands Jours team would like to extend their particular thanks:

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<td>17 boulevard de la Trémouille</td>
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<tr>
<td>BP 1602</td>
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<tr>
<td>21035 Dijon cedex</td>
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<td><a href="http://www.bourgognefranchecomte.fr">www.bourgognefranchecomte.fr</a></td>
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<th>Conseil Départemental de Côte-d'Or</th>
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<td>53 bis rue de la Préfecture</td>
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<tr>
<td>21035 Dijon cedex</td>
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<td><a href="http://www.cotedor.fr">www.cotedor.fr</a></td>
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<td>Espace Duhesme</td>
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<tr>
<td>18 rue de Flacé</td>
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<tr>
<td>71026 Mâcon</td>
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<td><a href="http://www.saoneetloire71.fr">www.saoneetloire71.fr</a></td>
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<td>Hôtel du Département</td>
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<tr>
<td>1 rue de l'Etang Saint-Vigile</td>
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<tr>
<td>89089 Auxerre Cedex</td>
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<tr>
<td><a href="http://www.lyonne.com">www.lyonne.com</a></td>
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</table>
Crédit Mutuel
24 avenue Albert Camus
BP 99898
21098 Dijon cedex 9
www.creditmutuel.fr

Arc International (see the press release attached)
10 boulevard Haussmann
75009 Paris
Contact Chef & Sommelier : Yann Guislain, yann.guislain@arc-intl.com
www.chefsommelier.fr