



12-16 march 2018

Edition N° 14



Press pack

Le rendez-vous des vins de Bourgogne au **cœur** de nos terroirs
The Bourgogne wine event at the **heart** of our terroirs



Social media:

Share your Grands Jours de Bourgogne experience
with the hashtag **#BourgogneGJB**

If you are on **Twitter**, your posts will be published live
on the website: **www.grands-jours-bourgogne.com**

You can also join the **Facebook group:**
Les Grands Jours de Bourgogne



© BIVB / Image & Associés



Press contacts:

Cécile Mathiaud
BIVB Head of PR

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

Mathilde Paturaud
BIVB Press Attachée

Tel. +33 (0)3 80 25 06 96 – +33 (0)6 78 78 07 68
mathilde.paturaud@bivb.com

Find all our press releases and thousands of rights-free photos
in our online press room at www.bourgognewines.com



SUMMARY

Grands Jours de Bourgogne, 12 to 16 March 2018: The Bourgogne wine event at the heart of our terroirs	1
Our aim	1
An international reach.....	3
Program of the Grands Jours de Bourgogne	4
New for 2018	5
Tools available	7
Economic Report: Awaiting the fine 2017 vintage, Bourgogne wines are continuing to satisfy their markets ...	8
Advance trade transactions: A return to growth	9
Exports: Record revenue in 2017	11
France: Bourgogne wines well represented on traditional circuits	21
Regional Charter: The industry moves towards greater controls over the use of vine treatments	26
Four main fundamentals	26
Fieldwork to establish dialogue and share experiences	27
On the technical side, a range of projects is being set up.....	27
The 2017 vintage, the epitome of Bourgogne elegance	29
White wines	29
Red wines	30
Crémant de Bourgogne	30
The 2016 vintage: a wonderful surprise!	31
White Wines	31
Red Wines.....	32
The 2015 Vintage: simply Sublime!	33
White wines	33
Red wines	34
Our Privileged Partners.....	35

Appendices:

- Key figures for the Bourgogne wine region and the Grands Jours de Bourgogne
- Bourgogne Franche-Comté The “Grands Jours de Bourgogne” (Great Days of Burgundy), bringing the art of good living to perfection in Bourgogne-Franche-Comté
- The Maison des Climats: where you can find out everything you need to know about the Climats of the Bourgogne winegrowing region – A UNESCO World Heritage site
- Crédit Mutuel : An effective business model built around its network



Grands Jours de Bourgogne, 12 to 16 March 2018: The Bourgogne wine event at the heart of our terroirs

The Grands Jours de Bourgogne event began in March 1992 and has 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.



The 14th edition of Les Grands Jours de Bourgogne offers some wonderful discoveries and great opportunities with prime occasions for networking. Our producers will be on hand over the course of five days, with 14 tastings in 10 locations, from Chablis in the north to Mercurey in the south.

Visitors will be tasting the 2016 vintage, along with some older wines. 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's edition, of whom 1,060 who will be attending for the very first time. Optimize your time and networking opportunities - there are plenty of delights in store!

Our aim

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.

The Bourgogne region and its people may, at first glance, seem complex. But this exceptional event, offering **14 tastings in 10 different locations**, allows attendees to discover the region and its wines in the very *terroir* itself. It brings people together in a unique way and encourages buyers and producers to connect.

Some 2,322 visitors attended the 2016 edition, coming from 54 countries.

A survey of attendees from the 2016 edition revealed that 92% were satisfied with the overall organization, and 96% said they were ready to return in 2018.

The industry is keen to show off the region to the world through events organized in the heart of the vineyards and estates that 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 autonomy. Its board of directors, presided by Raphaël Dubois, is composed of wine industry professionals who have steered numerous initiatives and who ensure the event grows and evolves from year to year.



© BIVB / Aurélien IBANEZ



© BIVB / Image & Associés

Key partners

The Bourgogne Wine Board, the Conseil Régional Bourgogne-Franche-Comté, and Crédit Mutuel are all partners of the event. The departmental councils of the Côte-d'Or, Saône-et-Loire and the Yonne also support this event, which enjoys international reach.





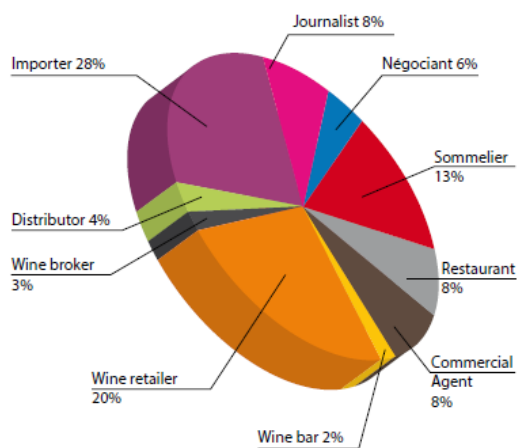
An international reach

Importers (28% of visitors in 2016), wine store owners (20%), sommeliers (13%), journalists (8%)... 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.

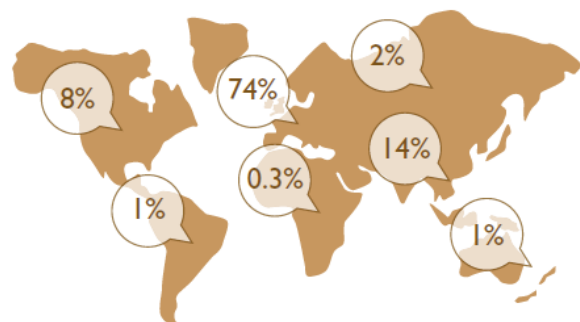
Visitor profile for 2016

In 2016, 2,322 visitors from 54 territories made the trip, and the event's popularity is growing, with 36% more first-time visitors in 2016 than in 2014.

Overall distribution by professional category



Distribution by geographic area



Summary of the 2016 edition

- ▶ More than 10,000 visits to 14 tasting sites
- ▶ 1,020 exhibitors, up 7% on 2014
- ▶ 92% trade and 8% press
- ▶ 40% French visitors and 60% from outside France
- ▶ 54 countries represented, including seven new ones, compared to 51 nationalities in 2014



Program of the Grands Jours de Bourgogne

Monday 12 March

Chablis and Grand Auxerrois

Press room:

Maison des Vins de Chablis et du Grand Auxerrois - Le Petit Pontigny - 1 rue de Chichée - 89800 Chablis

- Les Portes d'Or de la Bourgogne / Maison des Vins de Chablis et du Grand Auxerrois - Chablis **138 exhibitors**
- ☾ **by night** BOURGOGNE WINE ALLIANCE **5 exhibitors**

Tuesday 13 March

Côte de Beaune

Press room: Palais des Congrès - 19 avenue Charles de Gaulle - 21200 Beaune

- Terroirs de Corton / Cuvierie Maison Latour - Aloxe Corton **46 exhibitors**
- Pommard & Volnay, tout en nuances / Palais des Congrès - Beaune **58 exhibitors**
- Quintessence / Palais des Congrès - Beaune **95 exhibitors**
- Des Maranges au Montrachet en passant par Santenay et Saint-Aubin / Palais des Congrès - Beaune **86 exhibitors**
- Trinquée de Meursault / Léproserie de Meursault - Meursault **39 exhibitors**
- ☾ **by night** Pouilly-Fuissé : En Route vers les Premiers Crus **40 exhibitors**

Wednesday 14 March

Mâconnais

Press room: Palais des Congrès de Beaune - 19 avenue Charles de Gaulle - 21200 Beaune

- Symphonie Mâconnaise / Palais des Congrès - Beaune **147 exhibitors**
- L'Autre Bourgogne / Palais des Congrès - Beaune **56 exhibitors**
- ☾ **by night** Exceptionnelles 2018 **40 exhibitors**
- ☾ **by night** Passion Jura **23 exhibitors**

Thursday 15 March

Côte Chalonnaise

Press room: Tonnellerie de Mercurey - Rue de la Rolline - 71640 Mercurey

- Les Bio-Rencontres / Salle Polyvalente de Rully - Rully **64 exhibitors**
- Au Cœur de la Bourgogne / Tonnellerie de Mercurey - Mercurey **84 exhibitors**
- Salon des Jeunes Talents / Château de Garnerot - Mercurey **47 exhibitors**
- ☾ **by night** Grandes Maisons - Grands Crus **27 exhibitors**

Friday 15 March

Côte de Nuits

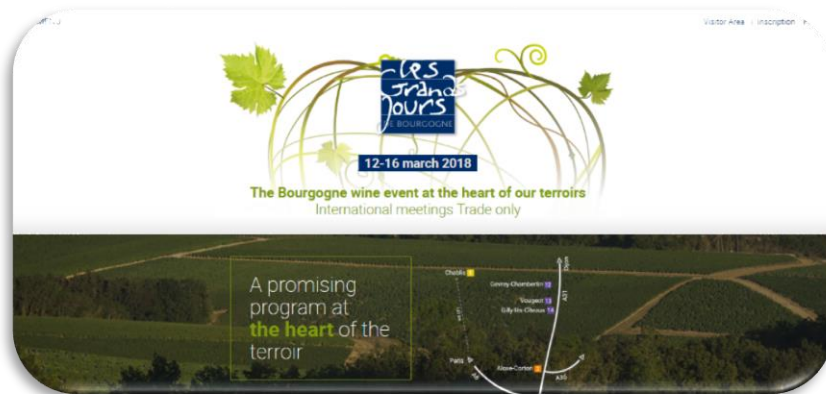
Press room: Complexe sportif - Chemin de Champ Franc - 21220 Gevrey-Chambertin

- Joyaux en Côte de Nuits / Complexe sportif - Gevrey-Chambertin **73 exhibitors**
- Vosne Millésime - Noblesse des Clos Vougeot / Château du Clos de Vougeot - Vougeot **63 exhibitors**
- Quatuor en harmonie / Château de Gilly-lès-Cîteaux - Gilly-lès-Cîteaux **89 exhibitors**



New for 2018

An updated website: www.grands-jours-bourgogne.com



Designed to be easy to navigate and simple to use, visitors can quickly find answers to their questions.

This new site is clear, precise, and dynamic. It is illustrated using new visuals and icons to make navigation appealing and intuitive.

The program for each day is easy to access and consult. It lists opening hours and locations of tastings, all the producers in attendance, appellations offered, shuttle times between sites, lunch hours, and evening events.

It offers a complete picture of the entire week, in both French and English.

Practical information



Roadbook



Press room



Pictures



Getting here



Shuttle service



Badges



Glasses



Accommodation



Restoration



Bourgogne wines



To visit



FAQ

A space dedicated to exhibitors and to visitors on the www.grands-jours-bourgogne.com website



Thanks to a new user space, visitors can access:

- ▶ Their own unique program with a list of the tastings for which they are registered
- ▶ Their personalized QR code to present on day one to obtain a badge and access the events
- ▶ Plenty more practical information regarding accommodation, refreshment options and shuttle service

Visitors can also contact exhibitors directly and comment on their wines using the “tasting note” tool.

Exhibitors also have a dedicated space packed with practical information and advice.



Easier access to events and greater autonomy

To speed up access to tastings, readers are in place at the entrance to each tasting, allowing visitors to print their own badges using the unique QR code received prior to the event. Our teams will be in attendance at each event to welcome you and point you in the right direction.

Imprimez votre badge !
Print your own badge

1 Scannez
le QR Code de votre confirmation d'inscription

Scan
the QR Code from your registration confirmation

2 Récupérez
votre badge

Take
your printed badge

New tasting locations close by the vineyards

The recently renovated **Léproserie de Meursault** hosts the “Trinquée de Meursault” tasting. The “Quatuor en Harmonie” tasting at the **Château de Gilly-les-Cîteaux** involves wines from the Nuits-Saint-Georges, Chambolle-Musigny, Morey-Saint-Denis, and Vougeot appellations. A tasting of organic wines will be on offer in **Rully**.



A handy shuttle service



A shuttle service will be available to visitors from Tuesday to Friday and will provide a speedy way to reach the different tasting locations from Beaune.

On Monday, the “**Les Portes d’Or de la Bourgogne**” tasting of wines from Chablis and the Grand Auxerrois is also served by a shuttle service.

The aim is to grow the number of visitors who can benefit from the event, whilst limiting its environmental impact.



Tools available

The Roadbook: Your made-to-measure guide

This pocket-sized notebook in French and English is available at the entrance to each tasting. It contains all the information you need for the week.

For each day of the event, it contains details of:

- ▶ Shuttle departure times and routes
- ▶ Maps of the tasting locations with GPS coordinates
- ▶ The number of exhibitors and wines presented
- ▶ Locations of the press rooms
- ▶ A detailed program of all the tastings



A tasting booklet for each day - to make your life simpler...



...and lighten your load! These pocket-sized booklets contain lists of all exhibitors, their contact details, their export markets, and the wines being presented at each tasting.

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

The press room moves around with you every day and provides an agreeable location with a wide range of services: Internet access, computers, local and national press, and refreshments...

The BIVB's press attachés are available to answer your questions and help you set up meetings with winegrowing professionals.





Economic Report: Awaiting the fine 2017 vintage, Bourgogne wines are continuing to satisfy their markets

The 2017 vintage amounted to some 1.509 million hectoliters, a more normal volume of production for the Bourgogne region than in recent years, although certain appellations were still below average.

The arrival on the market after springtime of the first bottles of the 2017 vintage will, in part, compensate for the lack of wine for certain appellations from the 2016 vintage.

The first six months of transactions (August 2017 to end-January 2018) saw strong volumes traded, higher than the average of the 10 last campaigns. That boosted volumes leaving estates, which were down on the last campaign 2016-2017 (a fall of 9% on 2015-2016), but which nonetheless remained higher than the volume of the 2016 harvest.

On the export market, 2017 was a good year (up 0.7% by volume and 10.7% in terms of revenue), since the effects of the 2016 vintage had not yet entirely been felt. Red wines and white *AOC Village Premier Cru* or *Grand Cru* wines present on the market were still mainly from 2014 and 2015. White appellations with fast turnover, notably Chablis and Petit-Chablis, did, however, have to deal with a lack of available wine from 2016. The overall stability in volumes is due to this lack of wine.

Bourgogne wines maintained market share in France, where 51% of their sales are made.



©BIVB Sébastien BOULARD



Advance trade transactions: A return to growth

The good 2017 harvest should boost sales direct from estates

The 2017 harvest totaled 1.509 million hectoliters, up 5% on the 10-year average 2007-2016

The fact that the 2017 harvest was overall more abundant than that in 2016 should have a positive impact on the advance market. **With total volumes of around 1.509 million hectoliters** and almost 50,000hl of VCI (*Volume Complémentaire Individuel*), the total was up 5% compared to the average of the 10 last years (2007-2016). Wine leaving estates thus saw a healthy start to the 17/18 campaign, up 8% (August to December 2017 over same period in 2016), helped by the fine quality of the vintage.

- ▶ 879,777hl of white wine excl. VCI (up 21% on 2016)
- ▶ 473,977hl of red wine (up 41% on 2016)
- ▶ 146,470hl of Crémant de Bourgogne (down 4% on 2016)

- **White wines were up 21%** over 2016, with major differences depending on whether appellations were affected by spring frosts:
 - ▶ **Régionale white appellations from the Mâconnais were down 10%** (24% of white volumes)
 - ▶ AOCs from the **Chablis** region (27% of all white volumes) **were up 52%**. These were still below the average of vintages from 2011-2015 (down 16%)
- **Red wines were up 41%** over 2016 (up 26% on the average of the past five campaigns), again with disparities depending on sector:
 - ▶ **Régionale Bourgogne AOCs** (43% of red volumes) **were up 36%** over 2016
 - ▶ **Mercurey reds, including Premier Cru** (5.3% of red volumes) **were up 15%**
 - ▶ The **Bourgogne Hautes Côtes de Nuits and Bourgogne Hautes Côte de Beaune** red appellations (12% of red volumes) **were up 66%**
- **Crémant de Bourgogne** (146,470 hectoliters for the 2017 campaign) **was down 4%**.

As a reminder, **wine leaving estates during the 16/17 campaign**, which overall was down 8% on the 15/16 campaign, **were nonetheless up on the harvest volumes for 2016**. They totaled 1,321,936hl (with 1.223 million hectoliters harvested). **Stocks at the end of the 2017 campaign were therefore once again down, by 2%** compared to the stock at the end of the 2016 campaign.



©BIVB / Michel JOLY



- **White wine leaving estates 16/17** (796,365 hl): **Down 11.5%** (compared to the campaign from 1 August 2015 to 31 July 2016), with major differences according to appellations.
- **Red wines leaving estates 16/17** (378,178 hl): **Down 2.7%** (down 8.8% on the average of the last five campaigns), with significant disparities depending on the region.
- **Crémant de Bourgogne leaving estates 16/17** (147,320 hl): **Up 2 %**.

Transactions in 2017-2018: an excellent start to the campaign

Transactions in 2017-2018 (first six months of the campaign from August 2017 to January 2018), across all vintages, amounted to a total volume of 614,399hl (up 20% on the 2016-2017 campaign, up 1.4% on the 10-year average).

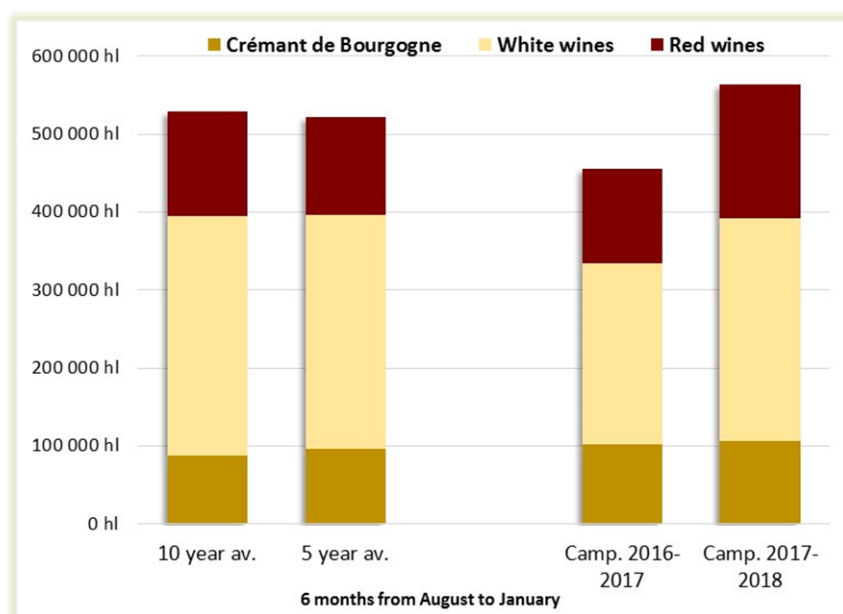
This was a very dynamic start to the campaign, an indication of the need to build up the low stocks due to the small harvest in 2016, to maintain the high level of sales in 2017, and to respond to demand in market.

- **Transactions for red wines** in the first six months of the 2017-2018 campaign reached their **highest for the last 10 campaigns**, at 190,870hl (**up 21%** on the average for the last 10 campaigns).
- **Transactions for white wines rose (up 19%** on the first six months of the 16/17 campaign), after the low harvest in 2016.
- **Transactions for Crémant de Bourgogne fell during the period (down 4%),** but stayed in line with the average last 10 campaigns (up 10%), going from 74,500hl in 2007 to 103,750hl in 2017 (first six months of the campaign). This growth was in part due to production from the Rhone Valley.

Transactions for all vintages of Bourgogne wines in the first six months of the campaign

Last two campaigns, five-year average, and 10-year average

(Source: BIVB)





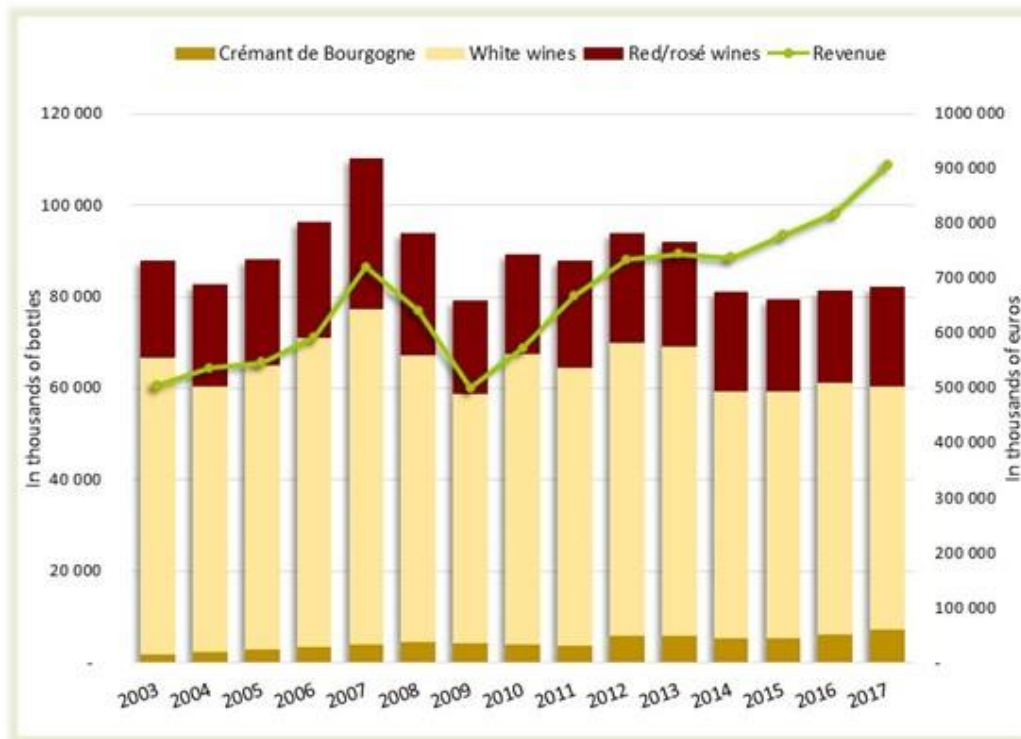
Exports: Record revenue in 2017

2017: around 49% of Bourgogne wine sales came from exports, to 177 territories.

Volumes of Bourgogne wines exported rose for the second consecutive year: Up 0.7% on 2016. This good performance was held back by the Chablis AOCs, impacted by the low 2016 harvest. Excluding Chablis, the number of bottles of Bourgogne wine exported rose by 6%.

The quality of Bourgogne wines, which have a high perceived value on export markets, helped the region to set a new record in terms of revenue of nearly 906 million euros, up 10.7%.

Bourgogne wines exports from 2003 - 2017
(Sources: Customs - BIVB - 12 months)



This growth in terms of revenue can be explained by a shift in sales towards more lucrative markets for Premium and Super Premium appellations. Since 2009, Bourgogne wines have lost ground in certain markets looking for high volumes and which can be difficult in terms of pricing (notably Germany, Sweden and the UK). The low volumes of red wines have, in parallel, led to a reorientation of efforts towards markets favoring white wines (USA, Canada, Japan).



White wines still dominate, but red wines are gaining ground

The performance of Bourgogne wines in export markets continued to be driven by white wines, which made up 61% of production (five-year average, 2012-2016).

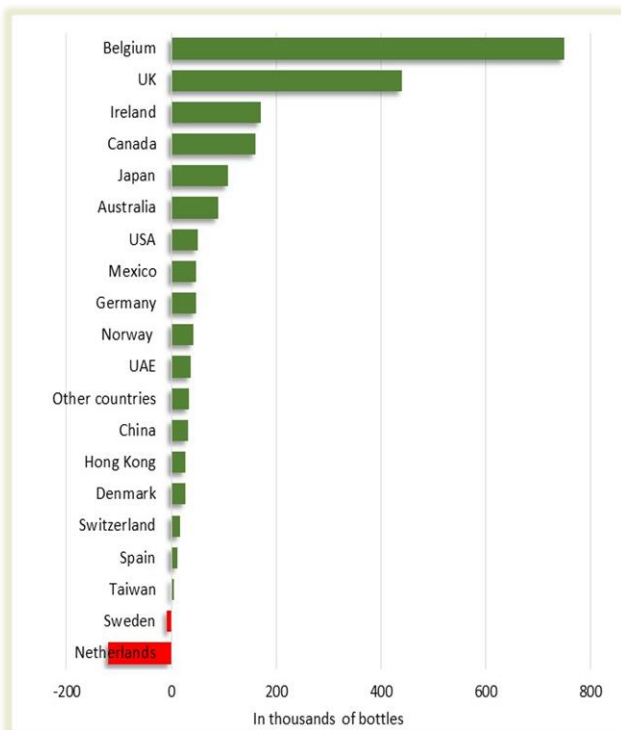
In 2017, white wines accounted for 65% of volumes exported (49% in terms of revenue), a slight drop on the average over the last five years (68%):

- ▶ 37% of this was made up of Chablis appellations (34% of revenue)
- ▶ 28% of this was made up of Mâcon appellations (18% of revenue)

The AOCs of the Mâconnais were the star performers of 2017. With 14.87 million bottles exported and revenue of 80 million euros, they were up 13.2% by volume and 13.5% in terms of revenue.

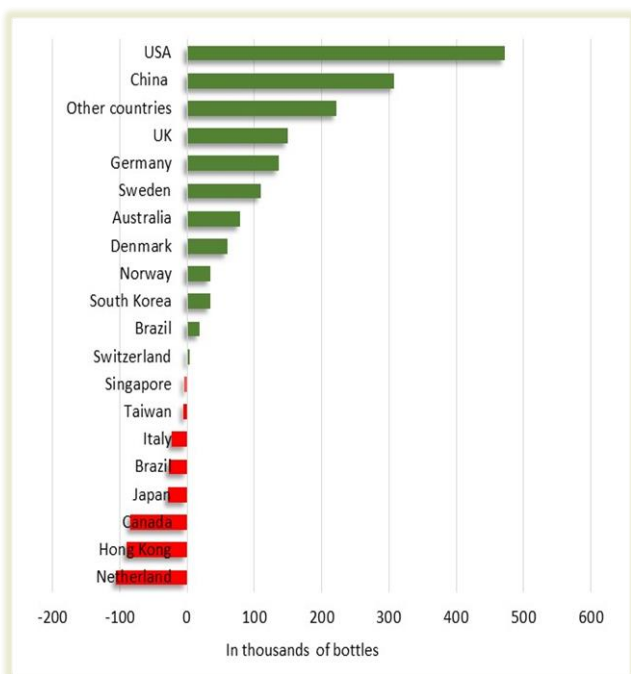
Evolution by volume of Mâcon AOC exports

(Sources: Customs – BIVB, 2017 over 2016)



Evolution by volume of Bourgogne red AOC exports

(Sources: Customs - BIVB, 2017 over 2016)



Bourgogne red wines (26% of volumes exported for 47% of revenue) **showed growth of 6.2% by volume and up 19% in terms of revenue.**

- ▶ Export volumes of *Régionale* Bourgogne reds were stable, with 13.3 million bottles (62% of red wine volumes)
- ▶ *Village* and *Village Premier Cru* wines of the Côte de Beaune and Côte de Nuits (24% of total volume) grew 10% by volume (5.24 million bottles) and 35% in terms of revenue (148.7 million euros)

Growth of red wines was driven by the United States (up 10.5% by volume and up 17.5% in terms of revenue), the United Kingdom, China, Sweden and Germany.

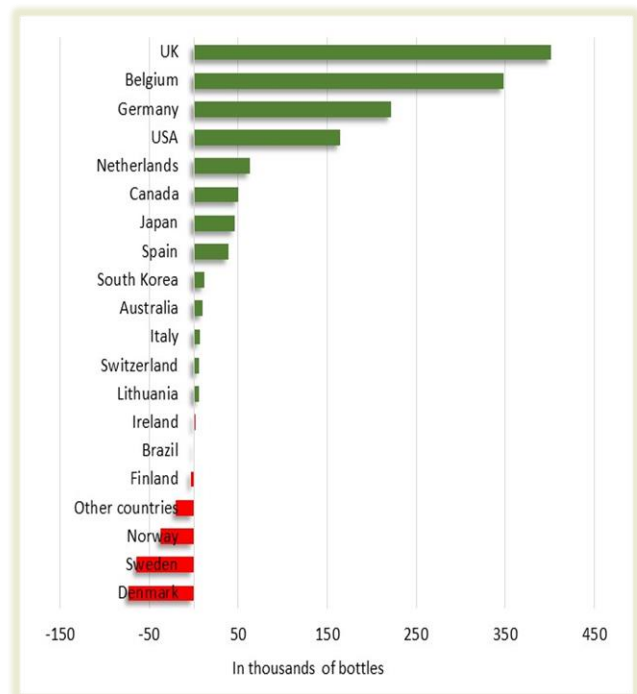


Crémant de Bourgogne wines were very dynamic in the highly competitive yet lucrative global marketplace for sparkling wines. Volumes exported in 2017 set a new record, up 19.4% on 2016 to 7.263 million bottles (9% of Bourgogne wine volumes exported).

The United States and Sweden were the two leading markets for Crémant de Bourgogne. Meanwhile, certain European markets showed strong growth, such as Germany (up 40.7%), Belgium (up 104.2%), and the UK (up 153.3%).

Crémant de Bourgogne has been carving out a space in recent years as a promising vector for growth for Bourgogne wine exports.

Evolution by volume of Crémant de Bourgogne exports
(Sources: Customs – BIVB, 2017 over 2016)



© BIVB / Aurélien IBANEZ



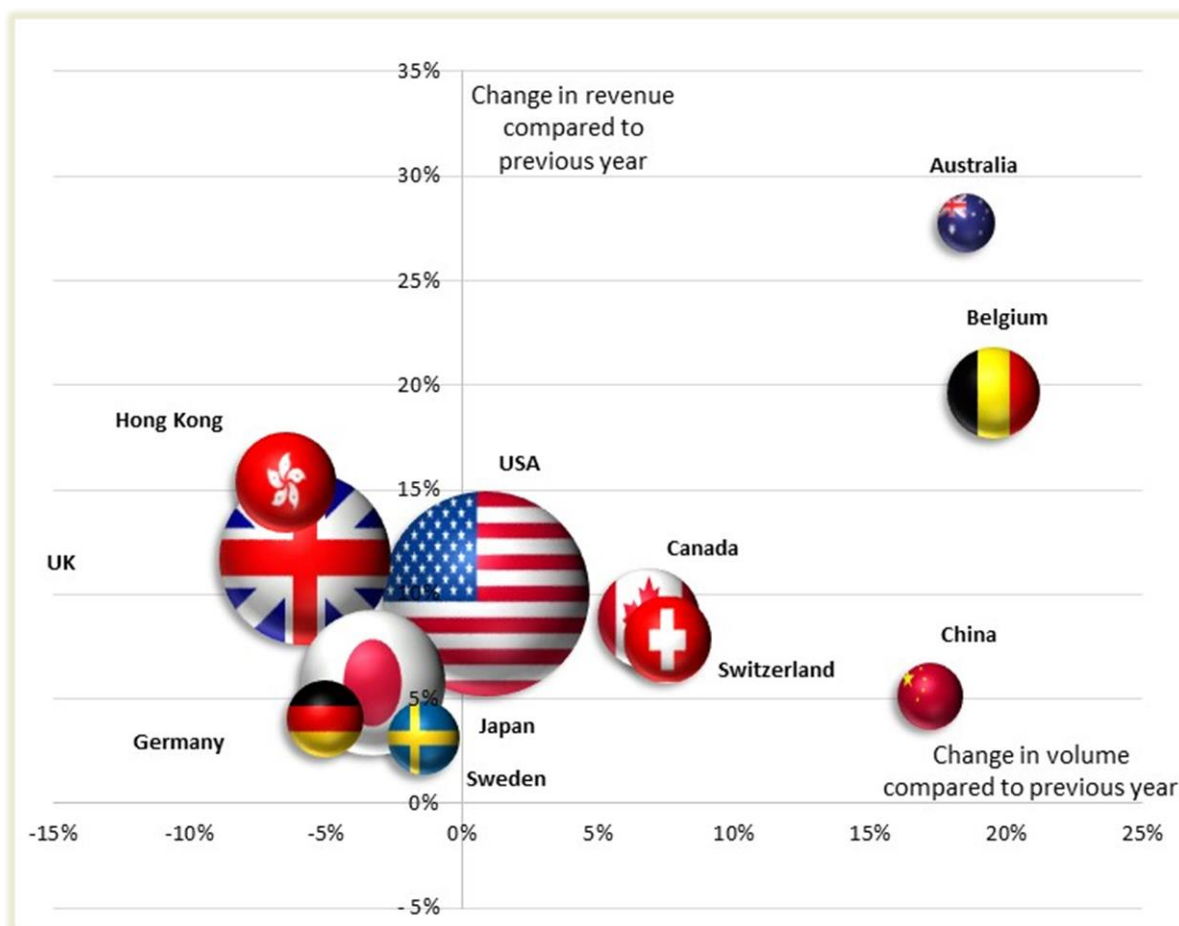
Performance by territory: Five leading markets account for 60% of volumes exported

Volumes exported in 2017 were almost evenly spread between EU countries (48%) and the rest of the world (52%).

In 2017, the five leading markets by volume for Bourgogne wines remained the same as they have done since 2011: United States, United Kingdom, Japan, Belgium and Canada. This quintet accounted for 64% of volumes exported, and 60% of revenue. The United States, Belgium and Canada showed healthy growth, both in terms of volume (up 6%) and revenue (up 11%). The UK and Japan showed a dip in volumes (down 4.9%), but continued to grow in terms of revenue (up 9.2%).

Evolution of Bourgogne wines exports in 2017

The size of the bubbles is proportional to revenue (Sources: Customs - BIVB)





United States, the #1 export market for Bourgogne wines

(23% in terms of revenue, 20% of total volume)

Bourgogne wines accounted for 35% of the volume of all French AOC white wines exported to the USA, and 49.3% of revenue in 2017.



- ▶ **This market is mainly driven by red wines.** *Régionale* Bourgogne appellations (65.3% of total volumes, 3.2 million bottles) were up 6% by volume. Only the *Village* and *Village Premier Cru* wines of the Côte de Beaune and the *Village* wines of the Auxerrois-Tonnerrois saw a dip in sales.
- ▶ **For whites,** *Régionale* Mâcon appellations (25% of volumes of white wine) and *Village* and *Village Premier Cru* wines of the Côte de Beaune, Côte de Nuits and Côte Chalonnaise all recorded growth by volume (up 3%) and in terms of revenue (up 8%).
- ▶ **Crémant de Bourgogne** posted strong growth by volume (up 11%).

It should be noted that many states showed an **increasing appetite for some of the lesser-known Bourgogne appellations**, which offer excellent value for money and which have compensated for the lack of availability of certain more reputed appellations.

This strong performance in the USA was in part due to a favorable euro/dollar exchange rate in 2017.

Looking ahead, the Bourgogne wine sector remains attentive to changes in tariffs on alcoholic drinks and customs barriers, and the evolution of the exchange rate. The protectionist approach of the Trump administration could lead to stricter customs and food regulations, while a project to reduce taxes on alcoholic drinks was adopted at the end of December 2017.

The United Kingdom, the second-biggest market by revenue

(16% of export revenue for Bourgogne wines, and 19% of volume)

Bourgogne wines accounted for 38% of the total volume of French AOC white wines exported to the UK, and 55% of revenue in 2017.



Despite the context of uncertainty surrounding the Brexit negotiations, exports of Bourgogne wines to the UK were up 11.7% in terms of revenue (145.7 million euros) in 2017. However, volumes exported (15 million bottles) fell back by 5.7%, greatly impacted by the lack of Chablis wines (down 24%). **Chablis AOCs alone accounted for 41% of Bourgogne white wines exported to the United Kingdom**

- ▶ **White wines** still account for the bulk of Bourgogne exports to the UK (81% of volumes exported), although as a whole, the country imports a large majority of red wines. There was healthy growth by volume (up 10.1%) and in terms of revenue (up 11.2%) for **Régionale white Mâcon appellations** (32% of Bourgogne white wines exported) and for *Village* appellations from Mâcon (up 17.9% by volume and up 14.1% in terms of revenue), but this did not completely make up for the shortfall in Chablis sales.
- ▶ **Régionale Bourgogne red appellations**, which accounted for 51% of the volume of red wines exported, showed significant growth, up 11.4% by volume and 46% in terms of revenue.



- ▶ Although **Crémant de Bourgogne** only accounted for 4% of volumes exported, it was a strong driver of growth in this market, soaring 153% by volume and 168% in terms of revenue.

Until the Brexit issue is concluded, many questions remain unanswered. Phase 1 has been approved by the European Council (15 December 2017). On 30 March 2019, the United Kingdom will officially leave the European Union. Phase 2 is in negotiation to map out the future framework that will govern trade relations.



Japan, the third-biggest export market in terms of revenue for Bourgogne wines

(11% of export revenue for Bourgogne wines, for 9% of total volume)



The Japanese market recorded a slowdown in overall wine imports (down 2.25% in 2017 on 2016), a trend which also affected Bourgogne wines.

- ▶ Japan is traditionally a market for **Régionale Bourgogne appellations**, which accounted for 41% of volumes exported (down 12%) and 33% of revenue (down 9%).
- ▶ **Wines from Chablis**, impacted by the low harvest in 2016, dipped 4% by volume and 3% in terms of revenue.
- ▶ Nonetheless, in 2017, **Village and Village Premier Cru appellations** from across the region, along with **Régionale** wines from Mâcon, made a strong comeback. This family of appellations, which accounts for 20% of volumes exported and 33% of revenue, saw sales rise 10% by volume and 14% in terms of revenue.
- ▶ Despite a downturn in **Régionale Bourgogne white appellations**, Bourgogne white wines still accounted for 46% of volumes all French white AOCs exported to Japan, for 64% of revenue.

In December 2017, the Japanese government approved the introduction in 2018 of free-trade agreements with the European Union. This decision is of major significance to the Bourgogne sector, since it is the **second biggest French region exporting AOC wines to Japan, and the leading one for white wines (2017)**.

Canada, the 4th biggest export market in terms of revenue for Bourgogne wines

(6% of export revenue for Bourgogne wines, for 8% of volumes)



Revenue for Bourgogne wines from Canada (49.8 million euros) showed strong growth (up 8.9%), driven by white wines (up 13.3%).

- ▶ **The Chablis appellations** surpassed the record set in 2016: 1.389 million bottles exported, for 11.6 million euros in revenue in 2017.



- ▶ **Régionale Bourgogne white appellations**, the leading group of appellations sold, were up 9.4% by volume, after a decade of continual growth in this market. Over this period, sales rose from 1 million bottles in 2008 to more than 2 million in 2017.
- ▶ **Crémant de Bourgogne** returned to growth: Up 16.2% by volume and 16.2% in terms of revenue.



The free-trade agreement between the European Union and Canada (CETA) has been “temporarily” in force since 21 September 2017. This decision, which abolishes duties and other trade barriers, is excellent news for the Bourgogne wine sector,

the third biggest exporting region of French AOC wines to Canada (and the leading region for white wines).

Belgium, the 6th biggest export market in terms of revenue for Bourgogne wines

(5% of export revenue for Bourgogne wines, for 8% of volumes)



From the star of the 2000s up until the recession in 2008, Bourgogne wines sales grew in this market, up 11% by volume and 13.6% in terms of revenue. Since 2009, Bourgogne exports have fallen, mainly due to falling sales of Chablis appellation and *Régionale AOCs*.

But in 2017, Bourgogne wines bounced back, with double-digit increases: Up 19.5% by volume and 19.6% in terms of revenue.

- ▶ **Bourgogne white wines** and **Crémant de Bourgogne** were driving this growth: Up 24% by volume and up 21.8% in terms of revenue.
- ▶ **Régionale Bourgogne and Mâcon white appellations** showed the strongest growth among still wines in this market, up 31% by volume (for 46% of volumes exported) and up 30% in terms of revenue.
- ▶ **Village appellations from Mâconnais** also contributed to this recovery, rising 24% by volume and 26.5% in terms of revenue.





China and Hong Kong in the top 10 markets by volume

Hong Kong, the 5th biggest export market in terms of revenue for Bourgogne wines

(5% of export revenue for Bourgogne wines, for 1% of volumes)

Hong Kong confirmed its growth in terms of revenue, up 15% to reach a total of 49.6 million euros in 2017.



- ▶ **Bourgogne** white wines benefited most from this upturn, with a 4% increase by volume.
- ▶ **Village and Village Premier Cru** white wines of the **Côtes de Beaune** and **Côtes de Nuits** continued their upward curve by volume (up 35%), as did **Régionale** white appellations from **Mâcon** (up 92%).
- ▶ All colors taken together, **Régionale Bourgogne** appellations were up 15.9% in terms of revenue.
- ▶ However, **Grands Cru** wines of the **Côtes de Beaune** and **Côtes de Nuits** fell back by volume for the second consecutive year (down 35.7%).

The Village and Village Premier Cru white wines of the **Côtes de Beaune** and **Côtes de Nuits** continued to grow by volume (up 35%), as did **Régionale** white appellations from **Mâcon** (up 92%).

Taking all colors together, **Régionale Bourgogne** appellations were up 15.9% in terms of revenue.

However, **Grand Cru** wines of the **Côtes de Beaune** and **Côtes de Nuits** dipped in volume for the second consecutive year (down 35.7%).

The dynamism in the market was boosted by the Hong Kong government, which is aiming to stimulate the economy after a slowdown in recent years. Hong Kong is also a platform for re-exports into other parts of Asia. **Village Premier Cru** appellations were particularly sought-after in this market of connoisseurs and collectors.

China, the 12th biggest export market in terms of revenue for Bourgogne wines

(2% of export revenue for Bourgogne wines, for 3% of volumes)

Of these two Asian markets, China performed best in terms of volume, up 17.2% in 2017. With total revenue of 21.4 million euros, this showed a rise of 5.1%.



Red wines (79% of volumes exported) were the main driver of growth by volume (up 27.4%), especially thanks to **Régionale Bourgogne** appellations (up 19.8% for 73% of red wine exports) and **Grand Cru, Village and Village Premier Cru** wines of the **Côtes de Beaune** and **Côtes de Nuits** (up 57.3% for 23.8% of red wine exports). This significant growth suggests that certain of these wines are now arriving directly in China, without going through Hong Kong.

Three countries showed revenue growth in a sluggish European market

Switzerland, the 7th biggest export market in terms of revenue for Bourgogne wines

(4% of export revenue for Bourgogne wines, for 2% of volumes)

Switzerland showed healthy growth by volume (up 7.6%), and in terms of revenue (up 7.9%) in 2017, thanks to an **upturn in sales of Bourgogne white wines** (up 13% by volume). This was especially driven by **Régionale** Bourgogne white appellations (up 13% by volume) and **Chablis/Petit Chablis** (up 36.3%).





Germany, the 8th biggest export market in terms of revenue for Bourgogne wines

(3% of export revenue for Bourgogne wines, for 4% of volumes)

In the 2000s, Germany was among the five main export markets for Bourgogne wines, both in terms of volume and revenue. In 2004, overall Bourgogne wine exports fell due to a drop in Chablis and *Régionale AOC* sales.

After a strong recovery in 2014 (up 9.8% by volume and 17.2% in terms of revenue), the market dipped once again in 2017 (down 5% by volume but up 4% in terms of revenue). This was largely because of sluggish performance in the supermarket sector. Sales of Bourgogne wines in this market, which is price-sensitive and depends on larger volumes, and were down 7% for the 12 months to August 2017, with sharper drop for white wines (down 10%).



Sweden, the 9th biggest export market in terms of revenue for Bourgogne wines

(3% of export revenue for Bourgogne wines, for 6% of volumes)

Sales of Bourgogne wines on the Swedish market fell 1.4% by volume, whilst showing a 3% upturn in terms of revenue. It is hoped this dip is only a passing phenomenon, after a period of sustained growth with Bourgogne wine sales rising from 3.2 million bottles in 2008 to 4.4 million in 2017.

In this context, certain *AOCs* continued to perform well, notably ***Régionale Bourgogne*** and ***Mâcon appellations*** (up 14% by volume and 16% in terms of revenue). ***Village and Village Premier Cru appellations*** also performed strongly, up 85% by volume and 71% in terms of revenue.



Australia, once a small market for Bourgogne wines with big potential

Australia, 14th market in terms of revenues des Bourgogne wines

Bourgogne wine sales have been growing year-on-year in the Australian market, both in the premium segment and for entry-level wines. **This trend was confirmed in 2017, with growth well into two figures, up 27.8% in terms of revenue and 18.5% by volume.**

On the face of things a small market for Bourgogne wines, Australia has been slowly but surely becoming a significant outlet, with sales more than doubling from 544,900 bottles in 2008 to more than 1.3 million in 2017. Over the same period, revenue soared from 7 to 16 million euros.

In 2017, **white wine** sales were up 19% in terms of revenue, while red wine sales soared by 38.8%, and Crémant de Bourgogne was up 12.2%.



- ▶ ***Régionale Bourgogne*** and ***Mâcon appellations*** accounted for the bulk of sales, with 39% of volumes exported (up 27%) for 32% of total revenue (up 36%).
- ▶ Then came the ***Chablis and Petit Chablis appellations***, with 19% of total volumes (up 23.5%) and 12% of revenues.



© BIVB / Jim Lee



Bourgogne wine exports 2017 on their main markets

(source: BIVB / Customs)

Exports of Bourgogne wines	Market share 2017		12 months 2017		% variation between 2017 & 2016	
	Volume	Revenue	1,000 bottles	1,000 Euros	Volume	Revenue
Total			82 080	906 273	0,7%	10,7%
USA	20%	23%	16 723	207 503	0,9%	10,0%
UK	18%	16%	15 059	145 739	-5,7%	11,7%
JAPAN	9%	11%	7 600	103 529	-3,3%	5,8%
BELGIUM	8%	5%	6 948	41 132	19,5%	19,6%
CANADA	8%	5%	6 544	49 792	6,9%	8,9%
SWEDEN	5%	3%	4 448	25 641	-1,4%	3,1%
GERMANY	4%	3%	3 459	29 066	-5,0%	4,1%
NETHERLANDS	4%	2%	3 190	22 018	-14,6%	-2,3%
DENMARK	2%	2%	2 026	19 805	-8,7%	10,5%
CHINA	2%	2%	1 814	21 382	17,2%	5,1%
SWITZERLAND	2%	4%	1 693	37 919	7,6%	7,9%
AUSTRALIA	2%	2%	1 315	16 117	18,5%	27,8%
NORWAY	1,5%	1%	1 207	10 265	-15,4%	-3,7%
HONG KONG	1,3%	5%	1 072	49 661	-6,4%	15,3%
IRELAND	1%	0,6%	818	5 306	22,6%	24,5%
TAIWAN	0,7%	2%	559	20 921	-0,3%	25,4%
UAE	0,7%	0,8%	541	6 801	1,8%	-2,4%
ITALY	0,6%	0,8%	529	7 508	-5,5%	9,7%
SOUTH KOREA	0,6%	0,9%	477	8 078	25,8%	28,1%
SINGAPORE	0,6%	1,3%	462	12 160	7,3%	17,6%
BRAZIL	0,5%	0,4%	440	3 729	24,0%	53,4%
SPAIN	0,5%	0,6%	424	5 435	41,9%	43,6%
ISRAEL	0,4%	0,3%	341	3 040	28,8%	28,1%
POLAND	0,3%	0,2%	286	1 856	31,7%	26,6%
LUXEMBOURG	0,3%	0,5%	262	4 126	11,3%	19,8%
RUSSIA	0,3%	0,4%	260	3 590	26,2%	33,1%
MEXICO	0,3%	0,3%	240	2 282	4,6%	10,3%
FINLAND	0,3%	0,2%	231	1 776	-15,5%	0,0%
LATVIA	0,2%	0,2%	195	1 994	-12,4%	9,8%
LITHUANIA	0,2%	0,2%	191	1 735	-15,0%	4,2%



France: Bourgogne wines well represented on traditional circuits

Bourgogne wines maintained market share in France, which accounted for 51% of sales.

This breaks down to 29% of total sales on the traditional circuit of restaurants, specialist wine stores and direct sales, and 22% on the supermarket and retail sector.



Specialist wine-store sector remains dynamic

According to a survey of 704 specialist wine stores (2015-2016), some 643 stores (91%) stocked at least one reference of Bourgogne wines. In the **top 10 among the offer from French wine regions, Bourgogne emerged as the leading region** (20% of the offer), mainly due to its impressive offer among specialist wine stores in its area of production (62% of the offer in the Bourgogne-Franche-Comté region). It also enjoyed good representation in the Paris region and the Grand East region, which covers Champagne, Alsace and Lorraine.



The Bourgogne wine region dominated the white wine sector, and was present in 91% of specialist wine stores, with a much higher number of references than other regions. **For red wines**, the Bourgogne wine region was the second most widely available wine after Bordeaux, with 18% of the offer (23.5% for Bordeaux). In the **sparkling wine category**, Crémant de Bourgogne was available in 35% of those points of sale surveyed.

Of the 224,100 references recorded among the 704 specialist wine stores, 15.4% were Bourgogne wines (34,439 references). For references in 75cl bottles, Bourgogne wines accounted for almost 18% of the offer.

The most widely available Bourgogne appellations among those specialist wine stores surveyed was **Chablis**, comfortably out in front, followed by **Gevrey-Chambertin, Pommard, Pouilly-Fuissé, and Meursault** (source: 2015 - 2016 survey).



Bourgogne wines present in 65% of restaurants

The Bourgogne wine region, the leading wine region along with Bordeaux, accounted for 15% of the 72,000 wine references recorded on the wine lists of 1,328 restaurants in the mid-to-high price range (excluding starred restaurants). The region's wines were present in 75% of the restaurants visited, with 8.2 references on average per restaurant surveyed.

Some 50% of the offer of Bourgogne wine in bottles was made up of **Village and Grand Cru wines from the Côte de Beaune and Côte de Nuits**. By contrast, the offer of Bourgogne wine by the glass was mainly **Régionale and Village whites, Chablis, and Mâcon**.

Half of the offer of Bourgogne wine was divided between the Center-East region and the wider Paris region. Proportional to its size, it is the most widely available wine in the Paris region, along with Champagne.

The Bourgogne offer was mainly made up of white wines (58% of wines sold in bottle and two-thirds of the offer by the glass). Bourgogne white wines were present in 63% of establishments (of which 40% was by the glass). **For reds**, Bourgogne wines were available in half of those restaurants surveyed, but just 18% of establishments offering wine by the glass.

Apart from the **Chablis appellation**, available in one in three restaurants, no other Bourgogne AOC was present in more than 15% of establishments.

Crémant de Bourgogne was available in only 2% of establishments, since Champagne leaves little room for other AOCs in the sparkling wine segment.

As in 2015, more than half of restaurateurs observed stability in Bourgogne wine sales across all colors (52.9%, compared to 53.2% in 2015). Some 30% noted a decline in Bourgogne wines sales in 2016 (30.5% in 2015). Among these, 16% considered that the drop was greater than 5%. Meanwhile, 17% reported an increase in Bourgogne wine sales in 2016 (16.3% in 2015). Among them, 6% said the increase was greater than 5% (source: 2016 survey).

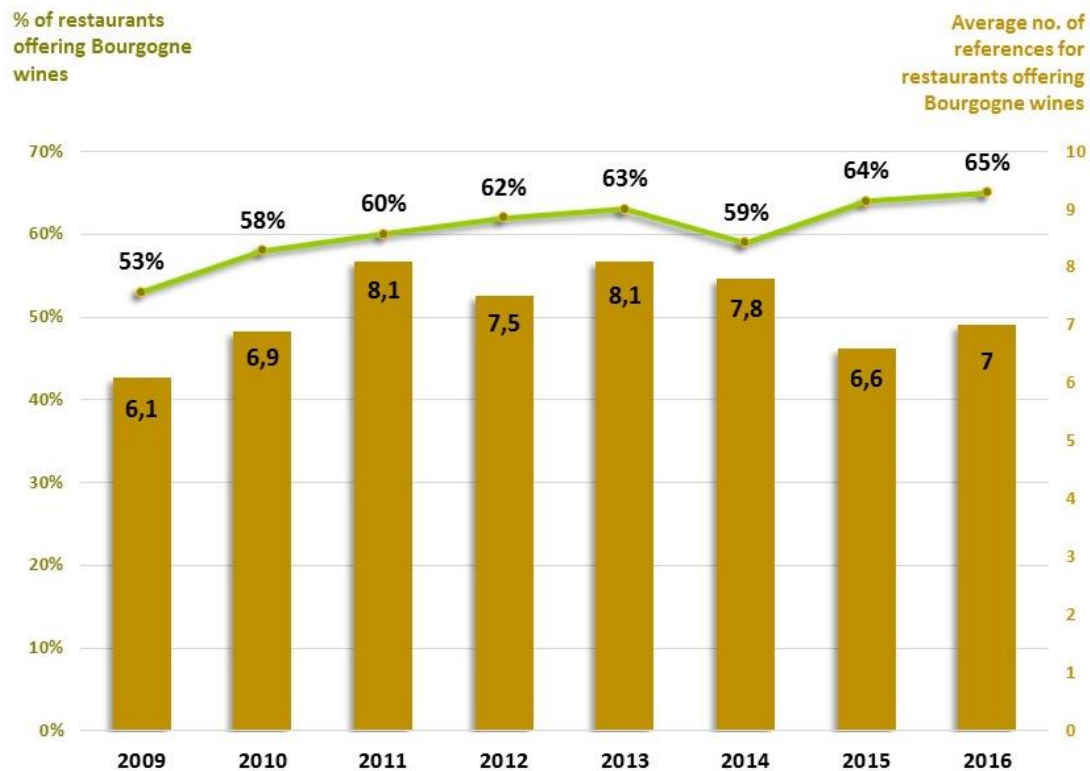


© BIVB / Michel JOLY



Evolution in the number of Bourgogne wine references in the French restaurant sector

(source: CHD Expert / BIVB)



Direct sales may be boosted by wine-tourism

In 2016, some 400 Bourgogne wine-producing establishments took part in a survey on this topic. Direct sales means selling to individuals (or groups of individuals), whether French or foreign, and without any intermediary (restaurant, wine store, supermarket, wholesaler, etc.), with sales made either on the producer's premises (estate, cellar, or winery), at a market or wine fair, or by correspondence/online. This accounts for around 20 million bottles of Bourgogne wine.



This survey revealed a **certain stability in each form of direct sales since 2011**, except for that at wine fairs/markets. It appears that the low availability of wine is not favorable for the development of direct sales to individuals.

- **Sales at the winery remain the most common** (92.4% of respondents, half of whom can welcome more than 15 people).



- ▶ In terms of ancillary activities, **estate visits remain the most widely proposed** by respondents (63%, unchanged since 2011). Accommodation is the activity most respondents are considering as part of future development (11%). Sale of gastronomic produce (excluding wine) is starting to generate considerable interest, according to experts.
- ▶ **The proportion of regular clients (45%) has been steadily falling since 2006, in favor of tourists**, French (33%) and foreign (25%). French tourists mainly came from the Paris region, followed by the Rhône-Alpes (34%). Foreign tourists were mainly Belgian, British, and Swiss.

Mainstream retail: The Bourgogne region returns to growth

Over the first 11 months of 2017, **sales of still Bourgogne wines in French supermarkets and hypermarkets grew by volume** (up 2% compared to the first 11 months of 2016), and revenue (up 4%). Some 22.46 million bottles were sold (excluding drive-thru, discount and convenience stores), for **record revenue of almost 178.7 million euros**.

The Bourgogne region, along with the Beaujolais, were the only two French AOCs with significant growth, at a time when overall sales of AOC wines, both white and red, are tending to drop on the supermarket sector (down 3.3% for white wines and down 3.1% for red wines over the first 11 months of 2017). This strong performance is in part explained by the low increase in average prices (less than 1.2% for white Bourgogne wines). Total sales of French AOC wines (white and red) slipped back by the equivalent of nearly 9.85 million bottles.

The robust harvests of 2014 and 2015 were behind these good results, but certain appellations which suffered low harvests in 2016 may see a slowdown in growth on this circuit in the months to come.

Over the first 11 months of 2017, **the share of Bourgogne red wines was stable** (down 0.8% by volume). Growth in sales of Coteaux Bourguignons, up 3.1% could not compensate for the decline in red Bourgogne appellations. One should note, however, the strong performance by Mercurey (up 4.6%) and Givry (up 3.9%).

White wine sales were up 3.8% by volume, mainly due to Mâconnais appellations: Up 19.7% for Mâcon *Village* wines and up 38.6% for Viré-Clessé. *Régionale* wines also showed good performance during the period: Bourgogne Aligoté sales were up 5.8% and *Régionale* Bourgogne whites were up 9.4%.

In the category of French AOC sparkling wines selling more than five million bottles, **Crémant de Bourgogne was one of the wines holding up best by volume** (up 0.2%), while French AOCs were down 2.8% by volume and down 1% by revenue.

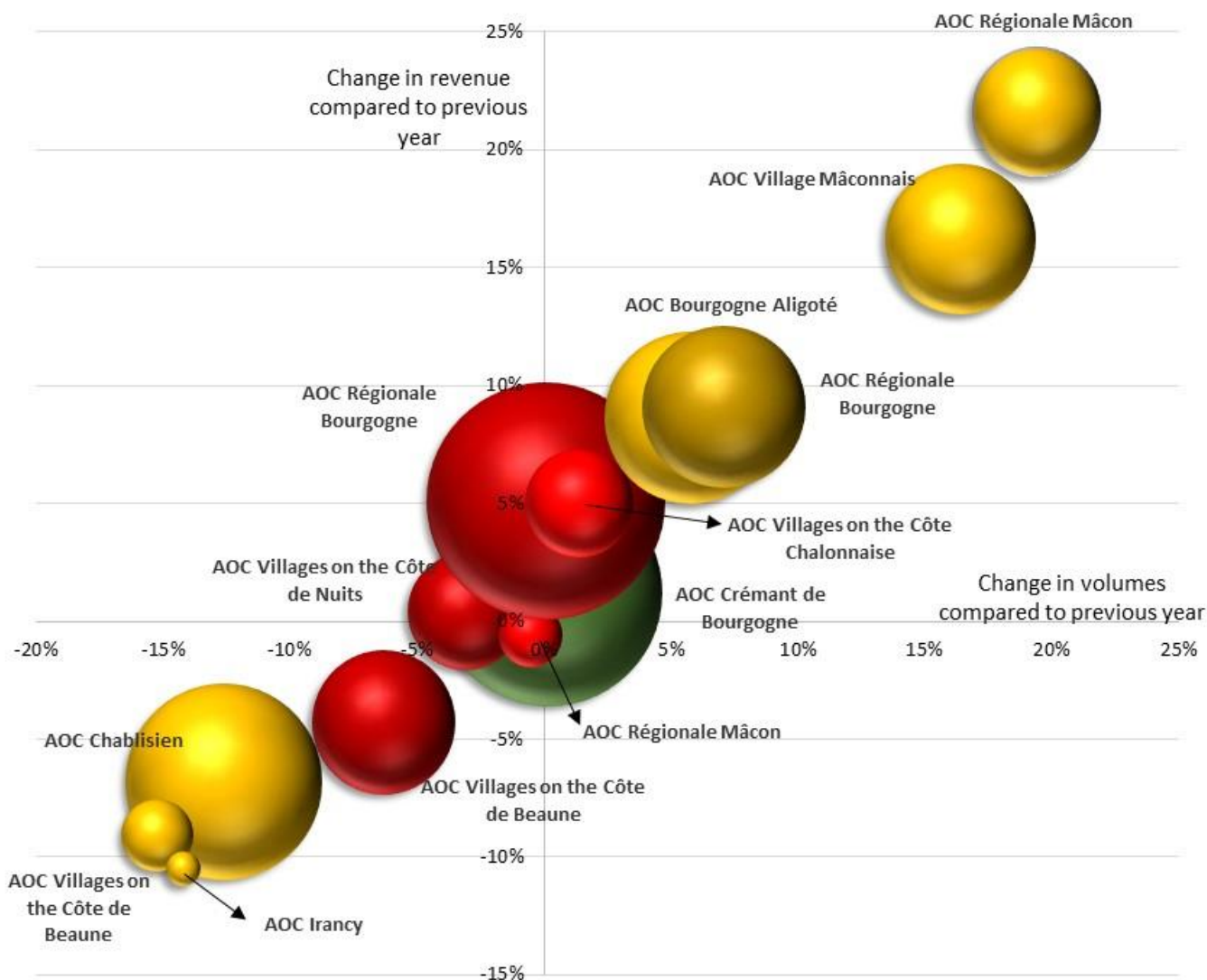




Evolution of Bourgogne wines sales in French supermarkets in 2017 by group of appellation

(sources: IRI / BIVB)

The size of the bubbles is proportional to revenue



This report was produced by the Markets and Development department of the BIVB, March 2018

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



Regional Charter: The industry moves towards greater controls over the use of vine treatments

The "*Terroir and Territory: A Commitment for the Future*" charter, approved at the General Assembly of the BIVB in July 2017, has entered its first phase of implementation. Created by winegrowers, it is the fruit of joint efforts between the BIVB and the Confederation of Appellations and Winemakers of the Bourgogne Region (CAVB). Its aims include meeting societal expectations regarding the use of products for use on vines, and since the fall of 2017, the action plan has been gradually taking shape. After a key phase this winter to raise awareness, different efforts are being introduced and work is intensifying.

This charter was born from a local tendency to innovate and to play an active, pragmatic role in the future, and to lead the entire industry towards achievable goals.



This approach builds on the successful experience of the fight against Flavescence Dorée. Joining forces to combat the spread of the disease meant that the Bourgogne winegrowing region was the only one in France to contain the disease while reducing the amount of insecticides used by 90% in four years.

Between 2016 and 2017, following several months of hard work with regard to the concerns of the sector and various players across the territory, the resulting Regional Charter and Action Plan was submitted to the bodies responsible for the management and defense of the appellations (ODGs), which gave their approval. Representatives of the state, the Bourgogne-Franche-Comté region, and the mayors of Côte-d'Or, Saône-et-Loire, and the Yonne also approved the project, which they signed at the same time as the Regional Bourgogne-Franche-Comté Chamber of Agriculture, Bio Bourgogne, the CAVB, the Federation of *Négociants-Eleveurs* of Bourgogne (FNEB), and the BIVB.

Four main fundamentals

Fostering local dialogue and shared experiments. It is not a question of duplicating what has been done elsewhere, rather adapting best practices to the realities of the Bourgogne region.

Structured communication involving winemakers, traders, and dynamic lawmakers, supported by the CAVB and the BIVB. The projects will also be supported by the ODGs, which form an essential local network.

An initial budget of €100,000 was voted by the BIVB in 2017/2018, to initiate the first phase.

A period of one year has been determined in order to test the relevance of the different proposals in the action plan, which will result in an evaluation and development of quantitative objectives.



Fieldwork to establish dialogue and share experiences

2018 is a key moment for the five-year Regional Plan. It should make it possible to strengthen dialogue in the field, to boost the profile of the winemaking profession, and also to start implementing a test phase of good practices, before they become widely adopted.

This winter, a dozen or so meetings were organized in the region by the BIVB, the CAVB and the Chambers of Agriculture. **They provided an opportunity to discuss the treatment assessment from the 2017 campaign and the Regional Charter, along with the national plan to fight dieback. They brought together more than 300 industry representatives.**

In parallel, the members of the steering committee have met with all suppliers of vine treatment products in the region. The resulting constructive exchanges made it possible to highlight potential areas for joint efforts for the future. Similar action is underway with wine equipment dealers, with the support of the Departmental Chambers of Agriculture, to discuss spraying practices.

By the beginning of the campaign, the "**Mémo Vigne**" guide, written by the Chambers of Agriculture, will be distributed to all professionals by the BIVB. It lists all the characteristics of plant treatment products and aims to promote those products that have the least impact on health and the environment.

By the summer of 2018, the sector will also be offering a booklet to provide a realistic portrayal of the profession of winegrower. This will introduce both residents and tourists to each stage of work in the vines, and the various constraints involved. It was created with the aim of opening up a dialogue and will be widely distributed.

On the technical side, a range of projects is being set up

DEMAT'VIGNE (Demonstration and self-training to reduce treatments in the vines): This flagship project, that is part of the Regional Plan launched in 2018, is supported by the Chambers of Agriculture of the Yonne and Côte-d'Or, Vinipole Sud Bourgogne and Bio Bourgogne. It aims to **raise awareness amongst winemakers with regard to low input strategies** (e.g. without carcinogenic, mutagenic, and reprotoxic substances or herbicides), thanks to the establishment of a network of demonstration plots. Communication and information materials promoting a shift in viticultural practices will also be made available.

For the past two years, **a project for varietal creation has been underway**. It is based on selection by crossing naturally resistant plants with Bourgogne grape varieties to preserve the regional character. **The first vines will be planted out in the spring in order to observe their agronomic behavior in real conditions.**



Other tools will also be shared with growers, such as tools for adjusting sprayers, a repository for pooling information on treatments, and a tool for refining diagnostics for disease recognition.



For the record, the four results we hope to achieve as a result of the Regional Action Plan are:

- ▶ **By the end of 2018:** A constructive dialogue on good practices will have been established on a territorial scale and the profession of winegrower will be better known by the general public
- ▶ **By 2020:** The Bourgogne wine sector will be committed to a plan for better information, training and sharing of good phytosanitary practices, with quantified objectives
- ▶ **By 2022:** The Bourgogne wine sector will have established a strategy to adapt materials and approaches to ensure greater efficiency in terms of product usage on a local level
- ▶ **By 2022:** The Bourgogne wine sector will have supported R&D and other joint projects aimed at reducing the use of vine treatments

📄 **An English translation of the charter is available on request from the BIVB Press Office**



The 2017 vintage, the epitome of Bourgogne elegance

November 2017



In 2017, everything came good for the Bourgogne winegrowing region in terms of both quality and quantity. And after several years of harvests that suffered the whims of the weather, 2017 has provided volumes set to satisfy the market, with wines that are already promising great things to come from this elegant vintage.

After spending the winter building up their strength, the vines profited fully from a very warm spring, with budburst in early April ensuring a head start in terms of the growth cycle that was maintained right up to the harvest. The plants progressed from stage to stage free from hindrance, and by mid-June, were flowering before rapid fruit set. An early vintage was confirmed.

During the summer, a few spells of heatwave alternated with more mixed weather. However, ripening continued at a good pace and by the end of August, the first grapes were being picked, two weeks ahead of average. Harvesting continued until mid-September as each plot reached peak maturity. The grapes were in exceptional health and required virtually no sorting. Everyone was very enthusiastic about this fabulous fruit, its peak ripeness, and the volumes produced. The only downside were a few areas hit by spring frosts, where yields were below norms.

Vinification went without a hitch and the mood was one of serenity for this vintage when the Bourgogne winegrowing region returned to more habitual levels of quality and quantity.

White wines

From the north to the south of the Bourgogne winegrowing region, opinion is unanimous: The 2017 vintage is one of the most elegant expressions of the Chardonnay grape, with perfectly balanced wines and a wonderful aromatic profile. They are crisp, with notes of citrus and white-fleshed fruit. Aeration triggers the release of hints of peach and apricot, while in the mouth, minerality and tension balance out this rich, fruit-filled palette. A very fine vintage indeed!



Red wines

Intense, dazzling colors ranging from ruby to garnet. From first glance, these wines simply invite one to taste them. Notes of red and black berries in these extremely expressive wines are another sign of indulgence, while perfect balance in the mouth combined with silky tannins results in a very harmonious ensemble that is subtle and without opulence.



Crémant de Bourgogne

The Chardonnay offer good balance, combining freshness with aromatic depth over notes of peach, quince, and tropical fruit. The acidity is present, but without excess, resulting in a light finish. The Pinot Noir are fruity, with touches of cherry and raspberry. In the mouth, they bring structure and a long finish. The Aligotés ensure a perfect blend, and bring good ageing potential. Lastly, the Gamay are indulgent, fruity, and expressive, and are the perfect partner, in the production of Crémant de Bourgogne rosés.

*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 2016 vintage: a wonderful surprise!

November 2017



© BIVB / www.armellephotographe.com

The people of the Bourgogne region love a story with a happy end. And the story of 2016 will linger in the memory. The wines of this vintage have proved to be excellent, despite the whims of the weather that tormented vines and winegrowers throughout the year. But one year on from the harvest, there is no doubt – 2016 was small in terms of quantity, but great in terms of quality.

After a mild winter, nobody suspected that the spring would bring a polar spell hitting a record area of vines at the end of April with a devastating frost. The episodes of hail that followed on the Mâconnais and the northern parts of the Bourgogne region once again reduced the harvest, while exceptional rainfall also made things difficult in the vines.

Fortunately, June marked the start of a hot, sunny spell, and the vines started to get back on track. Flowering, budburst, and ripening happened undisturbed, and the weather at the end of the season was fine. Harvesting began on 20 September and continued through to mid-October.

Despite being reassured about the quality of their wines, winemakers must nonetheless make do with some historically low quantities – with 1.223 million hectoliters, or just over 163 million bottles, some 20% below the 10-year average.

White Wines

Chablisien and Grand Auxerrois

The vintage has quality in spades. These wines offer lovely aromatic expression with notes of citrus and white-fleshed fruit like peach, apple, and pear, mingling with floral aromas. On the mouth, the wines are smooth and harmonious, but still maintain excellent vigor and a very pleasant minerality, making 2016 a high-quality vintage.

Côte de Beaune

The wines produced in 2016 are remarkable, characterized by excellent balance. Late ripening had a positive effect in terms of freshness, which is one of the key elements of this vintage. On the nose, they offer aromas of fresh fruit, flowers, and spice, and are very elegant and intense. In the mouth, they are broad, harmonious, and fleshy. They are perfectly structured and stand out with their impressive length and deeply pleasing finish.

Côte Chalonnaise

La Côte Chalonnaise tire son épingle du jeu. Les vins provenant de la partie nord présentent des arômes de fruits mûrs et de fruits secs (abricots, agrumes et amandes). En bouche, ils sont denses et charnus, leur tenue et leur longueur sont impressionnantes. Quant aux vins provenant de la partie méridionale, ils sont frais et tendres, marqués par d'agréables notes florales et fruitées. Leur fin de bouche est très gourmande.



Mâconnais

In the Mâconnais, the 2016 vintage was a late one, with harvesting carried out in mid-September, which explains the vigor of the resulting wines. The grapes were perfectly ripe, making for very aromatic wines, expressing floral notes of acacia and fruity touches of pear and quince. In the mouth, pleasant aromas of yellow-fleshed fruit and honey emerge. These are broad, well-structured wines that are perfectly balanced and ideal for enjoying in their youth.

Red Wines

Grand Auxerrois

The grapes ripened in good condition. Although the quantity was lower than average, the quality was anything but lacking. Marked by fruity notes with a touch of spice and berry flavors, the wines are balanced, with a smooth and silky tannic structure. They have excellent length in the mouth with a very pleasant finish.



© BIVB / Aurélien Ibanez

Côte de Nuits

The results were what winemakers had hoped for; elegant wines with a rich aromatic profile. Subtle floral notes of rose and peony mingle with intense flavors of red and black berries along with a touch of spice. In the mouth, they are fresh, yet rounded and fleshy. The tannins are tightly structured, smooth and yielding, with an excellent and promising length.

Côte de Beaune

The red wines produced on the Côte de Beaune offer all the characteristic signs of excellent years: Lots of aromatic intensity and lovely purity. Floral and fruity notes mingle with spicy and mentholated touches. In the mouth, they are perfectly balanced and elegantly structured, with great freshness and impressive length.

Côte Chalonnaise

A hot and dry summer allowed the grapes to reach optimum ripeness. Although there were a few differences between the north and south, overall, 2016 on the Côte Chalonnaise was a great vintage. The wines are richly aromatic, with notes of cherry and plum along with a touch of spice mingling with aromas of red and black summer fruits. In the mouth, they are corpulent and dense, with ripe and silky tannins over a lovely fresh acidity. Their length in the mouth is remarkable.

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 2015 Vintage: simply Sublime!

November 2016

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

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

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



White wines

Chablisien and Grand Auxerrois

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

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

Côte de Beaune

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

Here again, 2015 is without doubt an admirable vintage.

Côte Chalonnaise

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

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



Mâconnais

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

Red wines

Grand Auxerrois

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

Côte de Nuits

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

Côte de Beaune

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

Côte Chalonnaise

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



© BIVB / Image & Associés

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 de Bourgogne team would like to extend their particular thanks:



Bureau Interprofessionnel des Vins de Bourgogne

12 boulevard Bretonnière
21204 Beaune cedex
www.bourgogne-wines.com



Conseil régional de Bourgogne Franche-Comté *(see the press release attached)*

4 Square Castan – CS 51857
25031 Besançon Cedex
www.bourgognefranche.comte.fr



Conseil Départemental de Côte-d'Or

53 bis rue de la Préfecture
21035 Dijon cedex
www.cotedor.fr



Conseil Départemental de Saône et Loire

Rue de Lingendes
71026 Mâcon Cedex 9
www.saoneetloire71.fr



Conseil Départemental de l'Yonne

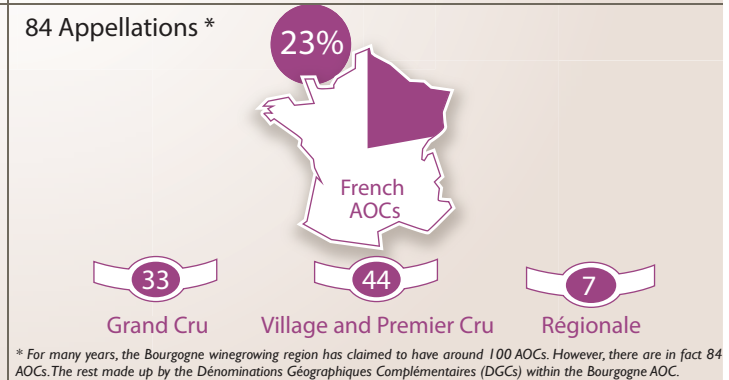
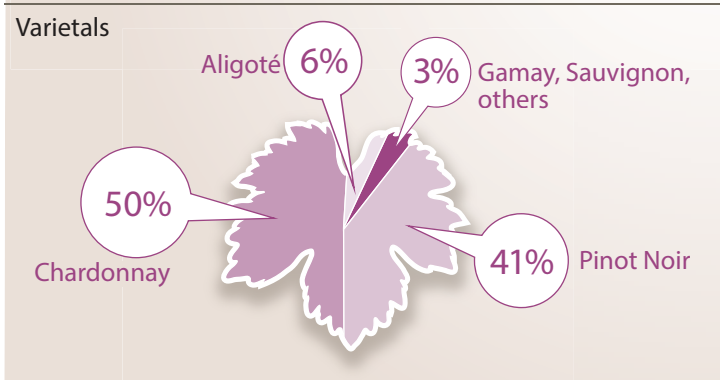
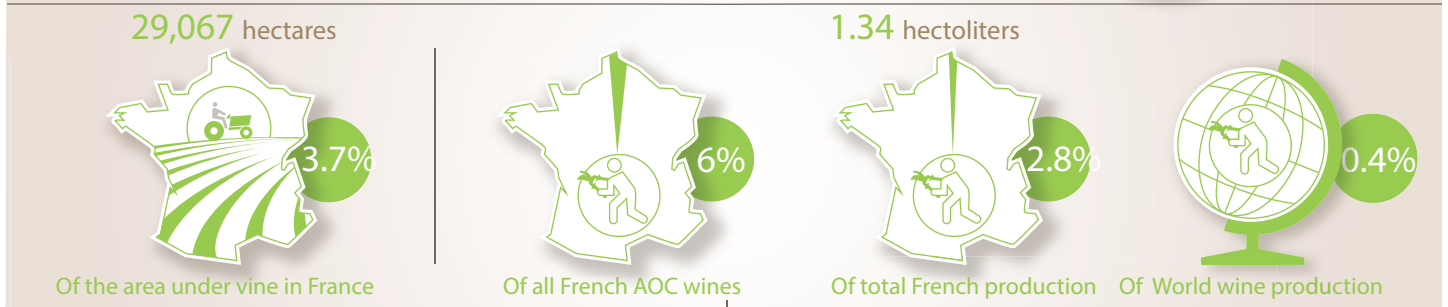
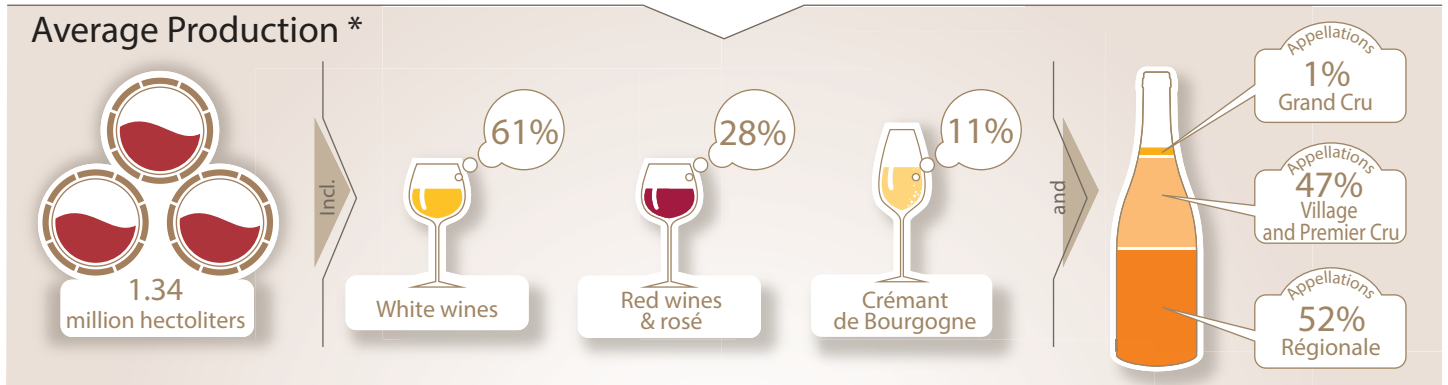
Hôtel du Département
1 rue de l'Etang Saint-Vigile
89089 Auxerre Cedex
www.yonne.com



Crédit Mutuel *(see the press release attached)*

24 avenue Albert Camus
21000 Dijon
www.creditmutuel.fr

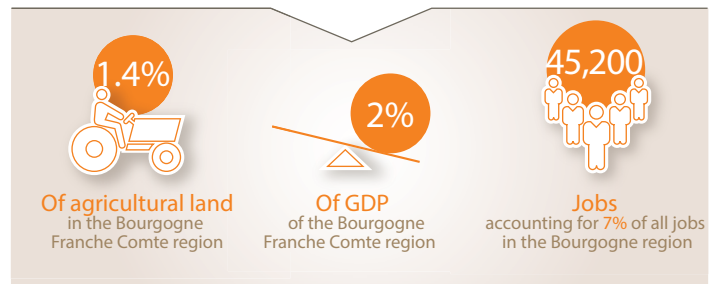
Key figures for the Bourgogne wine region



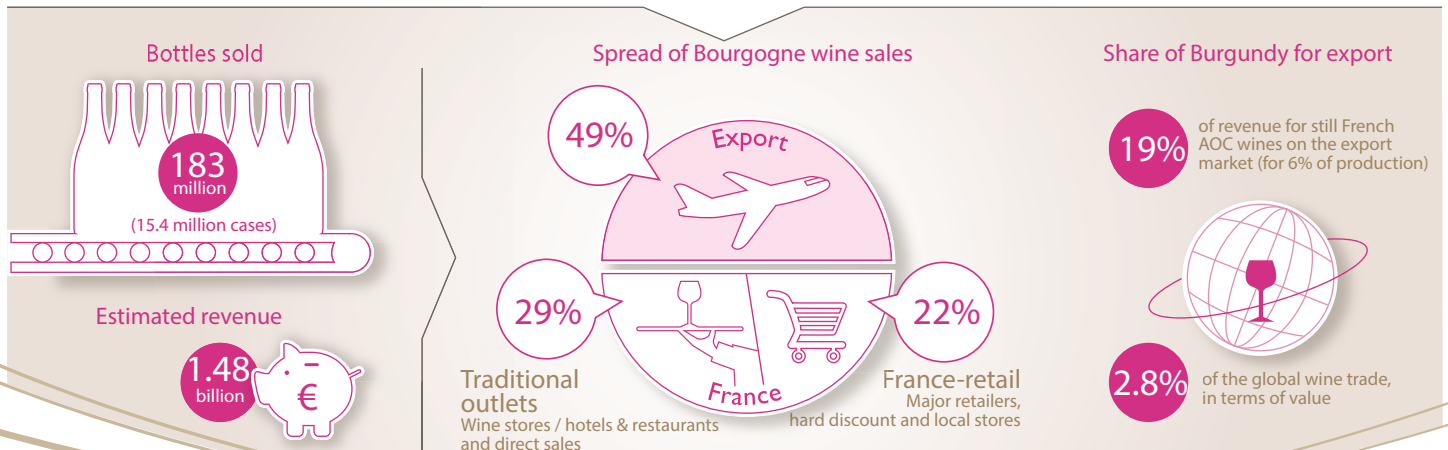
Businesses



Regional importance



The Market



12 - 16 mars 2018
Key Figures 2018



2,500 attendees



including 1,060 new

COUNTRIES REPRESENTED

50



MAIN VISITORS

29%

Importers

22%

Wine stores

7%

Sommeliers

9%

Restaurateurs

7%

Journalists



14 tastings



10 locations



5 evening events

The “Grands Jours de Bourgogne” (Great Days of Burgundy), bringing the art of good living to perfection in Bourgogne-Franche-Comté

The art of good living *à la française* reaches perfection in Bourgogne-Franche-Comté! A partner of the “Grands Jours de Bourgogne”, the Region invites you to discover its new touristic ambition: to make Bourgogne-Franche-Comté France's number one wine tourism destination.

The identity of our territory is inextricably intertwined with its millennia-old wine growing tradition. Its landscapes have been shaped by the needs of the grapevines and the devoted labour of men and women down the ages. The historic buildings themselves reflect a society organised around wine and the winemaking trades. Our winemakers' values are the product not only of respect for the environment and its quality, but also community spirit and conviviality. The passion that drives them and the love of their work has given rise to the region's *terroirs*. The strong image of wine-growing Burgundy forms the foundation of its standing in France and beyond, and today it is of strategic importance for the development of the regional tourism economy.

The attractiveness of our region and its reputation are embodied in ambitious and formative projects which are nurtured and supported by the Region. The network of Cités des Vins de Bourgogne (Burgundy Wine Centres) at three prestigious locations - Beaune, Mâcon and Chablis - has been launched. Building on the UNESCO World Heritage listing of the Climats du Vignoble de Bourgogne, the Cité Internationale de la Gastronomie et du Vin in Dijon will now see lovers of the culinary arts and pleasures of the palate flocking to its doors, following on directly from the addition of French cuisine to the UNESCO Intangible Cultural Heritage list.

The focal point of the Region's wine tourism ambitions, the “Grands Jours de Bourgogne” are designed to create connections and emotion, for a unique experience, a true journey into the heart of the 84 CDOs and 33 Grands Crus produced in Bourgogne Franche-Comté. The Region intends to promote this large-scale initiative, bringing importers, distributors, wine merchants, restaurateurs, sommeliers, journalists and others into contact with wine and wine-growing professionals. Our challenge: to welcome, attract, win and build the loyalty of new clienteles, French and foreign. A sector of excellence, wine tourism must showcase its prestige anew, in order to permeate all other tourist activities in the spheres of heritage, culture or nature, in all their forms. Our goal: to turn visitors to our region into committed ambassadors for an authentic and exceptional territory.

Press contacts :

Marie Souverbie – marie.souverbie@bourgognefranchecomte.fr – tél 03 80 44 34 66

Hélène Wokowski-Pierre – helene.wokowski@bourgognefranchecomte.fr – tél 03 81 61 61 08



Maison des Climats

CLIMATS DU VIGNOBLE
DE BOURGOGNE
PATRIMOINE MONDIAL

Photos : ©Michel Joly

The Maison des Climats

Where you can find out everything you need to know about the *Climats* of the Bourgogne winegrowing region – A UNESCO World Heritage site.

Since it opened in July 2017, the Maison des Climats in Beaune has been generating quite a buzz, with more than 20,000 visitors already passing through its doors. In this original exhibition, one can touch, read, interact with, and experience, through a range of media including a film on the big screen and content accessible via tablet computers. Visitors are invited to immerse themselves in the history of the Bourgogne winegrowing region going back over millennia, and to get to grips with the concept of the *Climats*, those celebrated plots of vines that have been named and defined over centuries, and which were included on the UNESCO World Heritage List in 2015.

This is an essential stage before any tasting or estate visit.

An exhibition combining noble materials with digital innovation

When visitors enter the Maison des Climats, a huge digital display tells the story of the *Climats* of the Bourgogne wine region in seven minutes. They will then come face-to-face with a nine-meter-long model of the Côte de Nuits and Côte de Beaune with which they can interact in augmented reality using one of 10 tablet computers available. There are spaces to find out more about the history, heritage, toponymy, and geography of the *Climats* to facilitate comprehension of this unique *terroir* winegrowing region.

To find out more, a digital media library offers some original resources to the curious. The trades of winegrower, *négociant*, cooper, and label-maker are all presented through short interviews. Similarly, three scientists use video to explain in the simplest possible terms the geology of the region, the appellation system, and how the *Climats* got their names. There are plenty more resources besides, including articles, photos, and archive documents, that will be accessible via a mobile application to be launched in a matter of weeks.



All the building materials used have been specially selected to immerse the visitor in the landscape of the *Climats*, with much of the focus on wood and stone.

Paving the way for future tourist attractions

"Here, we want to test out strategies and tools that we can reuse, either as they are or modified, for future projects such as the Cité des Vins et des Climats de Bourgogne in Beaune, and the Chapelle des Climats at the Cité Internationale de la Gastronomie et du Vin in Dijon," explains Bertrand Gauvrit, Director of the association.

An augmented reality version of the Climats: Scientific data finally accessible to the general public



Thanks to augmented reality that interacts with the model, in a matter of clicks, visitors can go back in time through four eras – the Prehistoric, the Middle Ages, the modern era, and today. A series of layers that are superimposed over the model help explain the geological formation of the soil and subsoil, and the gradual influence of the Dukes of Burgundy and religious orders on winegrowing on the Côte. Visitors can also see how the region is divided up in terms of varieties and appellations.

For each era, visitors will see the different historical monuments appear and reappear. A zoom system will help them understand the evolution of each plot and to visualize all the names of the *Climats*.

Maison des Climats: Porte Marie de Bourgogne
6 Boulevard Perpreuil - Rue Poterne / 21200 Beaune
Access: Via the tourist office / Free admission / Tel. +33 (0)3 80 262 130
Content available in French and English
www.climats-bourgogne.com

NEWS IN BRIEF

From the *Climats*, terroirs of Burgundy– UNESCO World Heritage

FROM 8 JUNE TO 8 JULY 2018 **Climats Month**

More than 50 events dedicated to the *Climats*: Strolls in the vines, guided tours, exhibitions, conferences, and tastings. And the highpoint on 4 July is the celebration of the third anniversary of the inclusion of the *Climats* on the UNESCO World Heritage List, with a bucolic picnic and a full events program.

Until 13 April 2018 **Preserving our heritage**

This program was launched by the association in 2017 to help winegrowers finance the restoration of their winegrowing heritage. To receive a grant, the proprietor must submit an application before 13 April 2018 and undertake to use traditional restoration techniques. Grants cover up to 50% of the work, limited to €25,000.

June 2018 **The first “Paroles Vignerones” audio exhibition**

Over the past year, the testimonies of men and women working in the world of wine have been collected to establish an audio archive of work in the vines and the winery. Some 20 contributors have already been interviewed and an initial soundscape will be presented this summer. A second, larger exhibition will run in for 2019.

MEMO

The *Climats*, Terroirs of Burgundy – included on the UNESCO World Heritage List

On 4 July 2015, the *Climats*, Terroirs of Burgundy, were added to the UNESCO World Heritage List. The area covered stretches from Maranges to Dijon, covering the vines of the Côte de Beaune and Côte de Nuits, in a fabulous patchwork *Climats*. The UNESCO listing details how the *Climats* were formed over millennia, as the winegrowers and local landowners defined the plots according to quality, diversity, and hierarchy, linking the resulting wines with the site of their origins, thus establishing a complete wine-related, social, cultural and scientific legacy.

As such, the inclusion on the UNESCO World Heritage List is not just about the vines, but includes all the legacy elements that embody the history of this winegrowing region: The 40 winegrowing villages, and the centuries-old traditions and know-how, the winegrowing heritage such as walls, huts, and clos gates, along with cellars, presses, and production setups, and not forgetting the emblematic monuments of the cities of Dijon and Beaune.



PRESS
Association of the Climats, terroirs of Burgundy– UNESCO World Heritage
Delphine Thevenot-Martinez communication@climats-bourgogne.com
Tel: +33 (0)3 80 20 10 40 / cell: +33 (0)6 31 42 13 50

AN EFFECTIVE BUSINESS MODEL BUILT AROUND ITS NETWORK

WWW.CREDITMUTUEL.COM

One of France's leading bankinsurers, the Crédit Mutuel Group offers a diversified range of services to private individuals, locally-based self-employed professionals and companies of all sizes. More than 82,000 employees and 24,000 directors offer their expertise, enthusiasm and attentiveness to nearly 31 million customers.

Every day, throughout the regions, the group brings together values that others separate: performance and proximity, innovation that benefits people, soundness and solidarity. These are values of a different kind of bank, one that affirms the relevance of its growth model year after year: the effectiveness of cooperation in the interest of all its customers and the economy.

Its key objective is customer relationship and service quality. Its strategy is one of controlled growth based on local banking, bankinsurance and technological innovation in support of customers and the regions.



**OUR GOAL IS
TO OFFER OUR
CUSTOMERS
HIGH-QUALITY,
SIMPLE,
INNOVATIVE,
SECURE AND
EFFECTIVE
PRODUCTS
AND SERVICES.
THAT IS WHAT
MAKES US THE
BANK OF THE
FUTURE.**

KEY FIGURES OF THE
CRÉDIT MUTUEL GROUP IN 2016
THE BANK OF THE FUTURE



2017
EDITION

2016 KEY FIGURES

ONE OF FRANCE'S LEADING RETAIL BANK INSURERS



17.1%
market share in
bank loans

15.5%
market share in
deposits

SUPPORTING REGIONAL DEVELOPMENT



€801.4
billion in
savings

€358.2
billion in
deposits

€415.1
billion in
loans

INSURANCE THAT MEETS EACH PERSON'S NEEDS



Over
14
million
policyholders

More than
38
million
policies

Insurance
accounts for
30%
of net profit
group share

A STRONG FINANCIAL BALANCE SHEET

NET BANKING INCOME

€16.824

billion

NET PROFIT, GROUP SHARE

€3.253

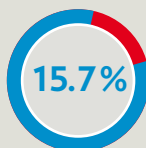
billion

A STRENGTHENED FINANCIAL STRUCTURE

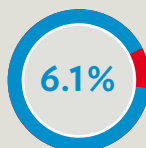
€49.540

billion
in shareholders' equity,
group share

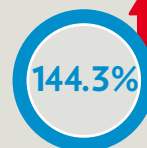
ONE OF FRANCE'S TOP BANKS



Common Equity
Tier 1 ratio



Leverage ratio



Liquidity
coverage ratio

2016 STRESS TESTS, CRÉDIT MUTUEL RANKS:

1st
among French
banks

4th
in the
euro zone

A HIGH-QUALITY ISSUER



STANDARD & POOR'S
with a stable outlook



FITCH
with a stable outlook⁽¹⁾
(1) rating assigned to BFCM.



MOODY'S
with a stable outlook⁽¹⁾

TRUST BUILT ON PERFORMANCE AND SOUNDNESS

In 2016, the group again strengthened its financial position. Thanks to the quality and strength of its assets, its Common Equity Tier 1 (CET1) solvency ratio was 15.7%, one of the best for French banks. This financial soundness, which ensures security for members and customers as well as long-term development – a condition for tomorrow's profits and jobs – is reflected in the ratings assigned to the group. Lastly, the Crédit Mutuel Group continues to be at the best level of French banks.

Crédit Mutuel

A SOUND, VIBRANT GROUP



**BEST FRENCH
BANKING GROUP**
for the 4th time
(World Finance)



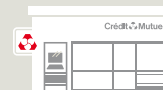
**NO. 1 IN THE BANKING
CATEGORY IN THE
CUSTOMER RELATIONS
PODIUM AWARDS**
for the 10th time
(BearingPoint – TNS Sofres)



TOP FRENCH BANK
« The World's Best Developed
Markets Banks 2017 »
for the 4th time
(Global Finance)

AN EXTENSIVE AND ENTERPRISING NETWORK

5,846
points of sale⁽¹⁾
(1) including 5,247 in France.



2,107
Crédit Mutuel
local banks

30.7
million customers



24,000
elected directors

81,657
employees

more than
73%

of employees
received
training at least
once in 2016
5% of total
payroll