

Bourgogne Wines Press Kit

Released for
the Hospices de Beaune
Wine Auction 2018



BOURGOGNES

*Bureau Interprofessionnel
des Vins de Bourgogne*



Social media:

Share your experiences and favorites during the wine auction
with the hashtag

#VentesDesVins

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***Bourgogne vs. Burgundy – What's in a name?** (Shakespeare - Romeo & Juliet)
To re-affirm its identity as one of the most iconic vineyard of France, the region and its
producers are reverting back to the **original French iteration of its name - Bourgogne.**
By maintaining this one true identity, Bourgogne returns to its historical roots as the
consummate brand treasured by consumers the world over.*

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Bourgogne 2018: An ideal vintage



© BIVB Aurélien Ibanez

The 2018 vintage was met with a unanimous show of satisfaction from the north of Bourgogne to the south. The exceptional weather, especially during the harvest period, resulted in grapes with perfect health, allowing picking to extend over almost a whole month.

Initial tastings ahead of the Hospices de Beaune Wine Auction have given an early idea that 2018 will be a truly great year.

The vines had built up some reserves over winter thanks to some very rainy weather, and the growth cycle began on the late side. When the sun started to show in April, the vines sprang into life, with budburst taking place very rapidly. The mild weather then allowed the plants to make up for lost time, even getting ahead of the average. Frosts in April sent a shudder across the whole region, but damage remained very limited. Flowering and fruit setting took place without hindrance.

Summer saw constant heat and drought, apart from a few hail storms in early July that were of no great consequence. The vines continued to grow at a fast pace until mid-August. Veraison took a little longer in places, the heat and lack of water affecting some of the younger vineyards.

Nonetheless, since the hydric reserves had been restocked over winter, most of the vines came to maturity nicely thanks to the ideal weather conditions.

The first grapes were picked in the last 10 days of August. Since the dates of flowering, the rainfall and temperature varied greatly from one area to another, harvesting extended into the last 10 days of September.

The fruit was in extraordinarily good health, and the weather was perfect, allowing each winemaker to harvest at the optimum moment. The mood was serene across the whole wine region, producers enjoying this magnificent vintage that combined quality and quantity. Many think this will be one of the best vintages in many years.

Vinification of the whites went without a problem, the grapes having retained a good level of acidity despite the heat.

The reds required a little more attention during vinification due to the relatively high level of potential alcohol.

White wines

In 2018, the aromatic complexity of the white wines is incredible. They are explosive on the nose, with an amazing diversity that reflects each *terroir*. The wines have a certain crispness and good minerality. In the mouth, they are rounded and generous, balanced with a nice tension.

Red wines

The 2018 reds have a seductive intense color. They are already well structured and powerful, with nicely-integrated tannins and good concentration of fruit. These exceptional wines are perfectly balanced, and are already tasting well in their first flush of youth.

This is a delicious vintage with splendid maturity.

Crémant de Bourgogne

This is a benchmark year, with expressive aromas that vary from one varietal to another, promising balanced and aromatic base wines. The Pinot Noirs are generous, with notes of cherry and rose, resulting in balanced wines with a pleasant freshness. The Chardonnays are powerful, with moderate acidity, making them well-rounded. The fruit aromas reveal some exotic notes, nuanced by fragrances of apple and peach. The Gamays have delicate aromas of raspberry and strawberry, underscored by citrus touches (clementine, lemon). The Aligotés are sharp and lemony, as usual, with good length in the mouth.



*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.*



Contrasting weather in 2018, in the Bourgogne region



© BIVB_Aurélien Ibanez

In 2018, the weather varied greatly depending on the month and the area, especially in terms of rainfall. Before the start of the growth cycle, it rained a lot during winter and the temperature varied widely from one month to the next. Despite growth starting on the late side, the vines subsequently burst into life.

Rain was largely absent during summer, despite some localized showers. Weather conditions from the end of spring and throughout summer were overall very sunny, warm and dry, keeping disease at bay. Thanks to the water reserves accumulated during the winter, the vines held up well during this drought, resulting in a quality harvest in excellent health.

A very rainy start to the year

January was atypical, with incessant rain and the warmest average temperatures since 1945. The Bourgogne region had 120% excess rainfall in the north (Chablis, Grand Auxerrois, Châtillonnais, Côte de Beaune and Côte de Nuits), and 150% excess in the south (Côte Chalonnaise and Mâconnais).

February was wintery, with rainfall in line with seasonal averages and temperatures 2.6°C lower than normal. The rain redoubled in March, though there were some major disparities. The Côte de Nuits, Côte de Beaune, Côte Chalonnaise and the Mâconnais had more than 120mm of rain, 50% more than normal, whereas Chablis and the Grand Auxerrois had only 60mm.

All this water put back the growth cycle, but also allowed the land to build up some reserves.

A warm spring

From April, mild weather prompted explosive budburst. The heat intensified over the following months, with sunshine far ahead of seasonal norms and scant rain in April and May. Only the Côtes and Hautes Côtes de Beaune and de Nuits received any significant precipitation in spring, with some storms.

This sudden warmth meant flowering was early and rapid, catching up for the lateness seen earlier on in the growth cycle. The vines grew so fast that winegrowers struggled to keep up. Bunches formed without any particular problem, suggesting a decent harvest. The damp winter and stormy spring raised the threat of mildew, but the return of warm weather and wind fortunately dispelled this.



A never-ending summer

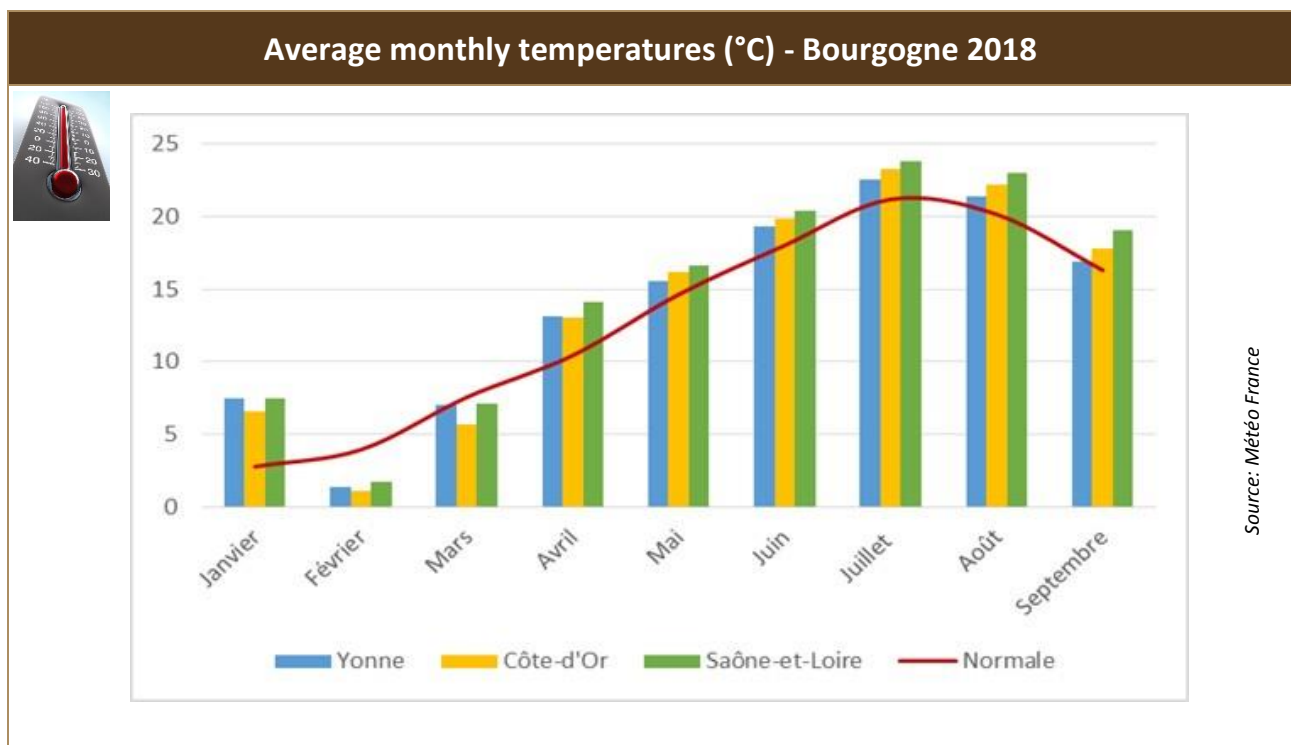
July, August and September all saw temperatures well above seasonal averages, with one period of heatwave. Rainfall was below norms, and only the Côte-d'Or had any rainfall, with some localized storms in July. Episodes of hail had some minor impact on the vines, notably around Nuits-Saint-Georges.

Sunshine far outstripped the average. By the end of August, the lack of water in certain areas slowed or even blocked veraison, with mainly the young vines suffering. The older vines and those growing in deeper soils profited all season from the water accumulated at the start of the year.

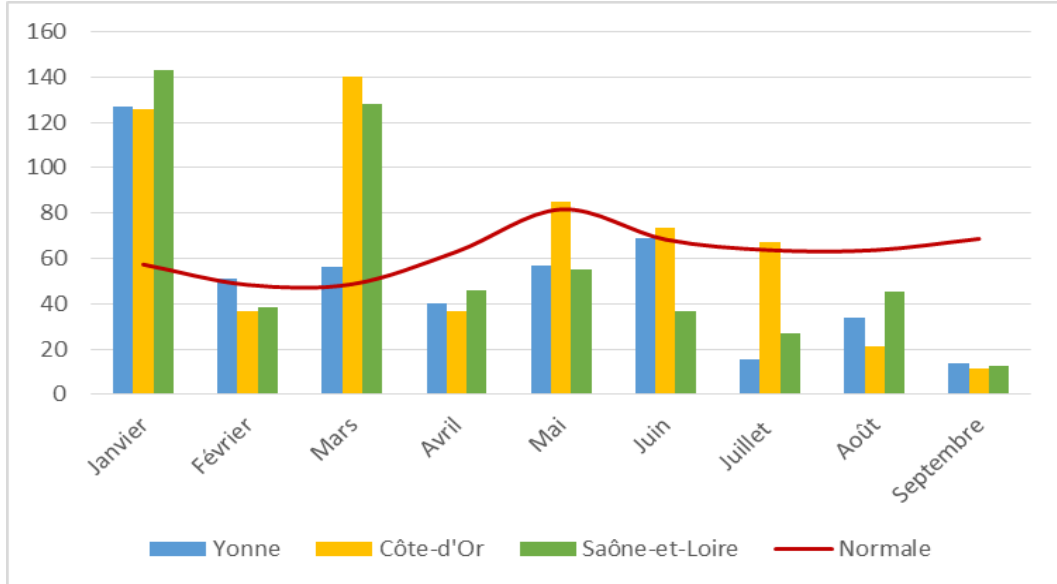
This sunny weather resulted in fruit that was in impeccable condition. In September, ripening continued, helped by cool nights, which limited the degradation of acids and evaporation of juice.

Harvesting stretched from 20 August to the third week in September, a particularly long span thanks to the optimal conditions, which allowed winemakers to wait for the exact moment to pick each plot.

Overall, the extraordinary weather in 2018 resulted in a very satisfactory harvest, both in terms of quantity and quality, leaving winemakers both reassured and delighted!

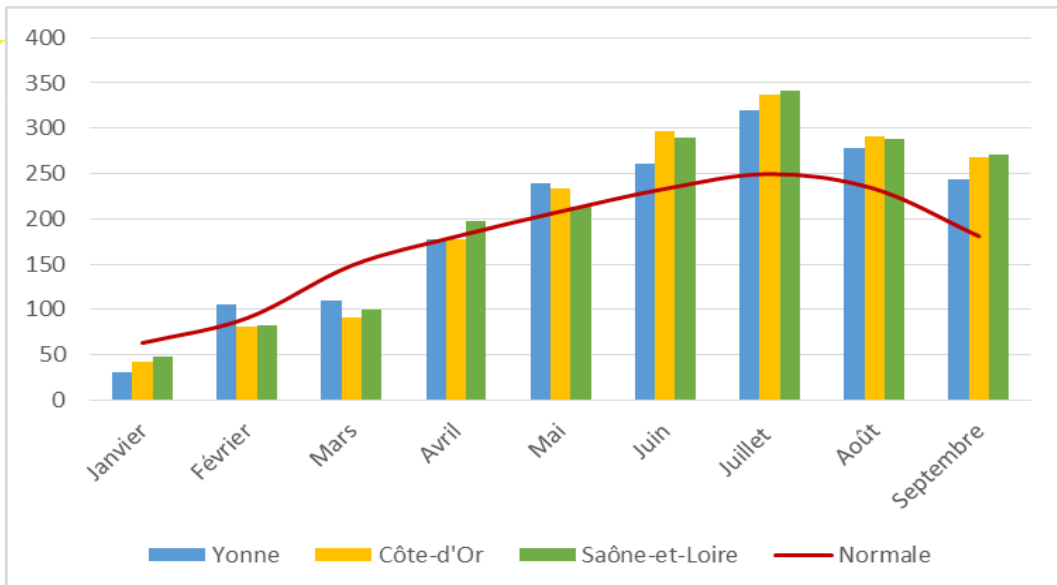


Average monthly rainfall (mm) - Bourgogne 2018



Source: Météo France

Average monthly sunshine (hours) - Bourgogne 2018



Source: Météo France



BOURGOGNES
Bureau Interprofessionnel des Vins de Bourgogne



2017 Vintage, All the elegance of Bourgogne wine



© BIVB / www.armellephotographe.com

In 2017, Bourgogne enjoyed a return to average yields, in particular in terms of red wines, which were also very high in quality. The markets caught on very quickly and were soon clamoring for this typically elegant Bourgogne vintage.

The vines' growth cycle benefited from a very warm summer, and with budburst in early April, it was ahead of norms and maintained this lead right up to the harvest. Everything happened very quickly. There were a few spells

of heatwave over the summer, alternating with some rather mixed weather. Ripening nonetheless progressed at a good pace. At the end of August, the first grapes were harvested, two weeks ahead of the average. The harvest continued to mid-September, each plot being picked when it reached optimum ripeness. The only downside was that some areas that were impacted by spring frost did not provide the yields that had been hoped for, mostly for the white wines.

A year later, tastings have confirmed first impressions: There are some fine wines out there from the 2017 vintage!

White wines

■ Chablis and the Grand Auxerrois

Ripening occurred in good conditions and the wines offer excellent quality. Their aromatic expression is marked by dominant floral and fruity notes. They are remarkably balanced in the mouth and their concentration and tension are underscored by a very pleasant vigor on the finish.

2017 is an elegant vintage with a very promising future.

■ Côte de Beaune

The grapes were consistent with undeniable quality. The wines offer citrus notes mixed with touches of pear, peach, and apricot. They are broad in the mouth, and magnificently balanced with a lively and flavorful finish.

A wonderful vintage with excellent keeping potential.

■ Côte Chalonnaise

Like its neighbor to the north, the Côte Chalonnaise produced high-quality wines, but with some disparities. Wines from the north are precise and aromatic, with wonderful tension. Those from the south are rich, smooth, and indulgent, with aromas of ripe white- and yellow-fleshed fruit.

A very fine vintage.

■ Mâconnais

These wines are particularly fruity, smooth, and balanced, with wonderful body. Their vigor is paired with a very pleasant, indulgent character. An excellent vintage.

| Red wines

■ Grand Auxerrois

2017 is a very interesting vintage with wines marked by intense floral and fruity notes of red berries and spice, and wonderful balance with silky tannins. A delicious finish means they can be enjoyed in their youthful prime.

■ Côte de Nuits

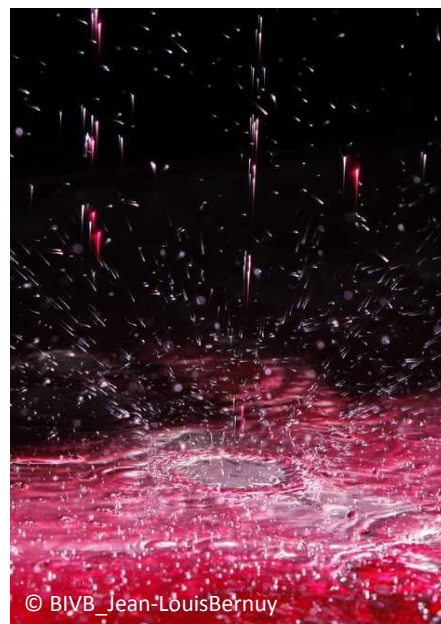
2017 is a high-quality vintage. The wines are intensely aromatic, marked by intense floral and fruity notes. They are forthright and superbly elegant, rounded in the mouth and perfectly balanced. Their texture, underscored by sophisticated and smooth tannins, is very agreeable. Good length and fine keeping potential.

■ Côte de Beaune

The weather allowed the grapes to reach optimum maturity. The resulting wines offer intensely fruity flavors of ripe red and black berries, along with a few pleasing touches of spice. In the mouth, they are perfectly balanced, with smooth, silky tannins and good body. A very fine vintage that can be enjoyed young, but which will also keep very happily for a few years.

■ Côte Chalonnaise

A little *millerandage* is the reason for these deeply colored, concentrated wines. Their aromatic expression and structure are superb. Ripe and silky tannins integrate into a sophisticated and tight structure. A superb vintage with impressive keeping potential.



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Bourgogne wines well placed to satisfy the market



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As the fabulous 2018 vintage goes into the cellar, those in the Bourgogne wine sector are all smiles. This upbeat mood has been boosted by good figures from both the export and domestic marketplaces. But there is no room for sitting on laurels, and wine industry professionals are working hard to regain share in markets which have dwindled in recent years due to a series of low harvests.

- In the trade market, the 2018 vintage's combination of quality and quantity has injected renewed vigor into transactions. The first three months of the 2018-2019 campaign (starting 1 August) saw a significant rise in volumes of must and grapes traded, up 31% on the first three months of the 2017-2018 campaign.
- For the 2017-2018 campaign, the volume of the 2017 harvests (up 23% on 2016 to 1.5 million hectoliters) gave a boost to wine leaving estates and transaction volumes for many appellations.
- In the retail market, those appellations that had performed well in 2017 continued to grow in export markets (United States, Sweden, Canada) and on French retail circuits.

The arrival of the 2018 vintage, estimated at 1.8 million hectoliters, should contribute to maintaining this dynamism into 2019.

Advance trade transactions buoyed by two good harvests

The 2017 vintage, which was overall more abundant than 2016, had a positive impact on available stock for most appellations. With 1.508 million hectoliters, this harvest injected a fresh dynamic into volumes leaving estates in the 2017-2018 campaign, which were up 9.3% on 2016-2017.

The very active start to the 2018-2019 campaign is the result of an ideal harvest across Bourgogne. The total yield of an estimated 1.8 million hectoliters (source: BIVB survey among 467 companies) features:

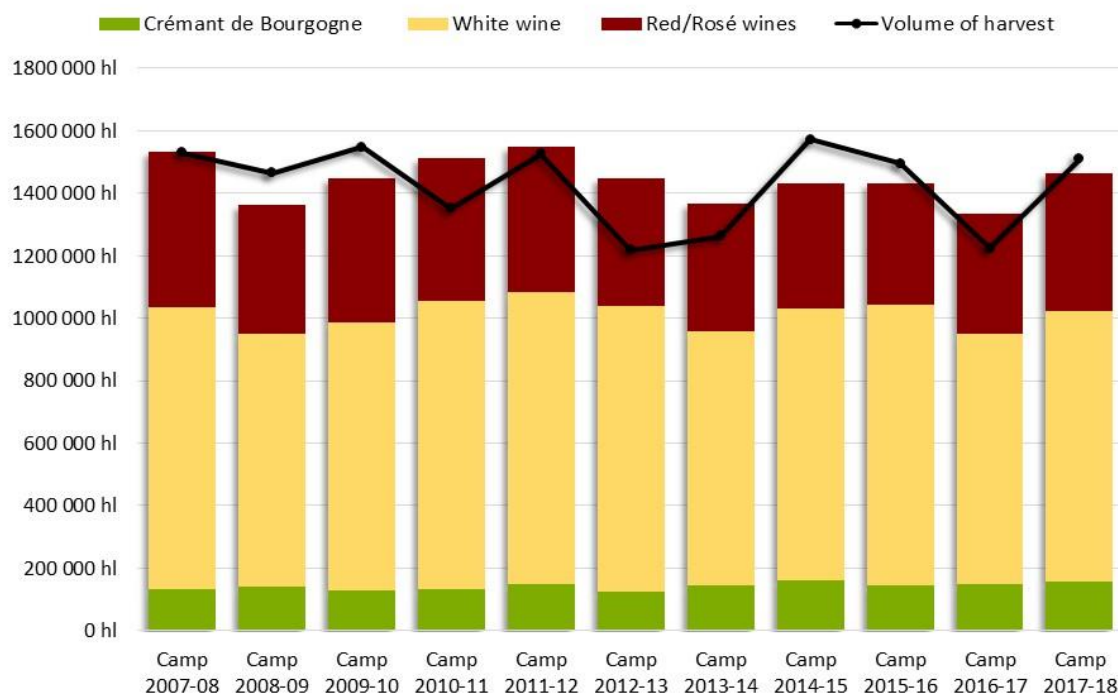
- A full harvest for all white AOCs, especially Chablis and the Mâconnais, which were impacted by weather incidents in 2017
- Volumes comparable to 2017 for red wines
- Strong growth for Crémant de Bourgogne, which will allow it to meet growing demand.

■ Greater volumes of wine leaving estates (2017-2018 campaign)

For the 2017-2018 campaign, **wine leaving estates was up 4.2% on the average of the last five campaigns, totaling 1.461 million hectoliters**. This renewed growth was mainly due to bulk transactions, which rose 18%, while sales in bottles fell by 1%.

Sales form the winemakers and harvest - Bourgogne

(source : Douane, CAVB et BIVB)



■ Transactions of must and grapes begin strongly

The start of the 2018-2019 campaign (1 August to 31 October) was very dynamic for must and grape transactions, which were up **45% for the first three months compared to the average of the last five campaigns (429,283hl)**. This is the best ever start to the commercialization of a vintage for must and grapes, up 31% year-on-year for the first three months of 2018. The volume reaches 510,575hl when wine transactions are included.

This dynamic was mainly driven by acquisitions of base wines for Crémant de Bourgogne, with an 80% increase compared to the average of the first three months over the last five campaigns for volumes of must and grapes, accounting for 31% of total volumes of Bourgogne must and grape transactions.

White wines, with 56% of total volumes of must and grape transactions, **were driven by the Chablis appellations** (43% of white must and grape volumes). This was 63% up compared to the average of the first three months over the last five campaigns.

Red wines (13% of total volumes of must and grape transactions) also saw strong growth of 31% compared to the average of the first three months in the last five campaigns.

In the same period, bulk trade volumes for the 2018 vintage accounted for 95% of the volume of transactions (485,893hl out of the 510,575hl traded). The proportion of the 2018 vintage in total transactions explains the dynamic at the start of this campaign.

Export: Bourgogne regaining share in foreign markets

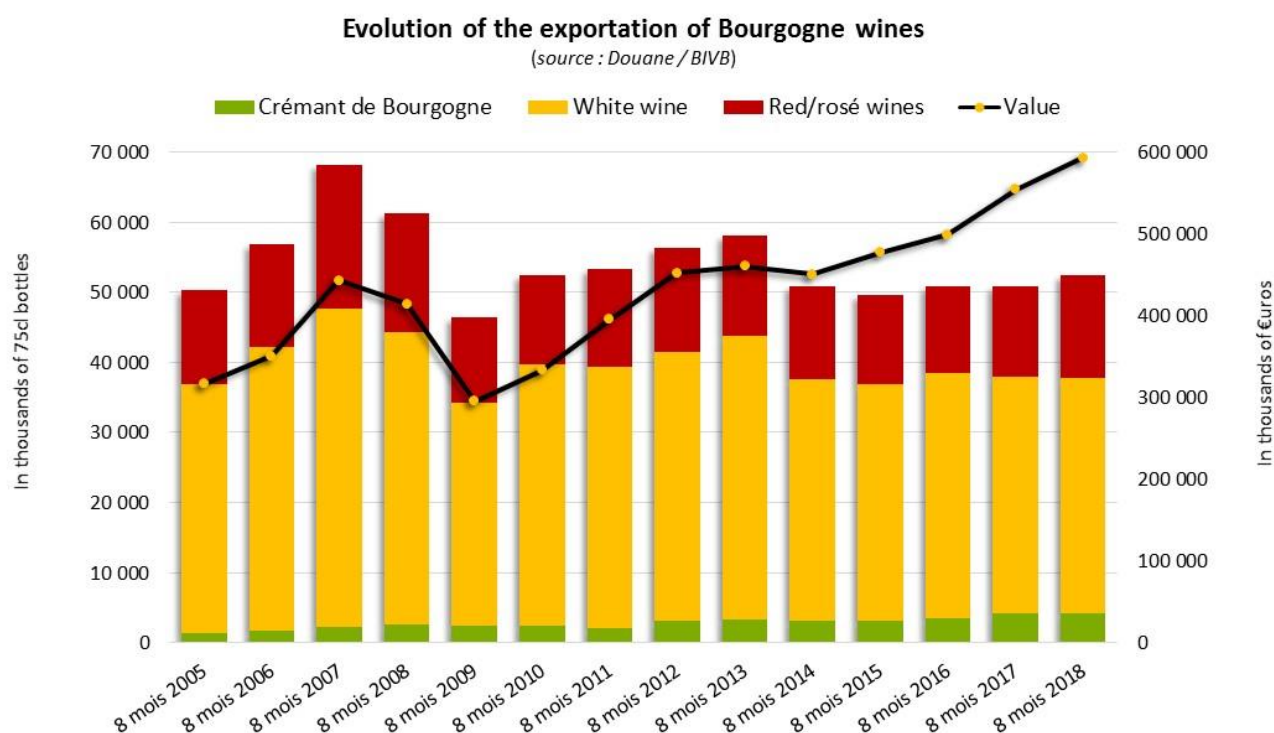
Bourgogne wines have made a return to certain foreign markets thanks to the commercialization of the 2017 vintage.

For the first eight months of 2018, Bourgogne wine exports rose to 52.5 million bottles (up 3.2% by volume over the same period in 2017).

These figures, however, mask some disparities.

Although the 2017 harvest was greater by volume than that of 2016 for Chablis wines (35% Bourgogne white wine exports), it remained below the average. That has had consequences for exports, which continued on a downward trend: Down 3.2% by volume over the first eight months of 2018.

Besides Chablis, volumes of Bourgogne wines sold abroad were up by almost 2 million bottles (up 5.2% on the first eight months of 2017).

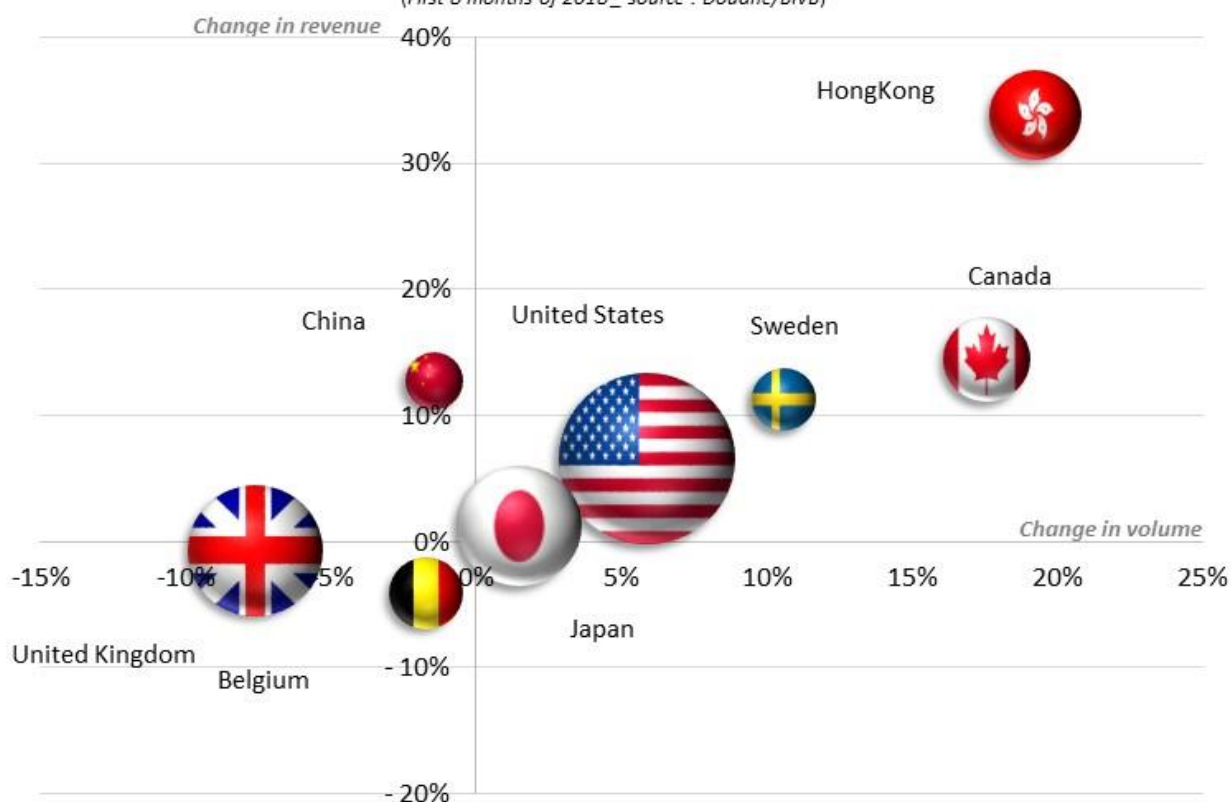


Revenue continued to grow, totaling 593 million euros for the first eight months of 2018 (up 7%), a new record. This was driven by appellations with a higher price point, which accounted for 31% of all revenue. As such, this mainly involved the appellations of the Côte de Beaune and Côte de Nuits, which generated revenues that were up 31% on the first eight months of 2017 (41% of Bourgogne revenues), especially on the markets of Asia and the USA.

This good performance involved nearly all the main markets for Bourgogne wines. Nonetheless, growth in export volumes were still down in two of the main European markets and in China. This was due to the lack of available wine for certain appellations that had been more impacted by weather incidents in recent years.

Change in export of Bourgogne Wines

(First 8 months of 2018_ source : Douane/BIVB)



How to read the graph:

The size of the bubbles is proportional to the market's proportion of export revenue for Bourgogne wines over the period

- Horizontal axis: Change in volume compared to the same period in 2017
- Vertical axis: Change in revenue compared to the same period in 2017

■ North America confirms its leading position

Exports of Bourgogne wines to North America continued to grow by volume (up 9% on the first eight months of 2017). This was accompanied by a fresh increase in revenue (up 8%), a rise of 13 million euros.

The United States, #1 market export (8 months 2018)

24% of total revenue from Bourgogne wine exports and 22% of total volumes.



With 5.9% growth by volume, the healthy performance of Bourgogne wines on the US market was confirmed. **Setting a fresh record in the last 10 years, some 11.6 million bottles of Bourgogne wines were sold in eight months in the United States.**

In 10 years, sales of Bourgogne wines have risen by 2.5 million bottles (first eight months of 2018 compared to the same period in 2009).

Bourgogne wines account for 34% of the volume of French white AOC wines exported to this territory, and **48% of the revenue** (first eight months of 2018).

Régionale Bourgogne and Mâcon appellations were among the top performers, up 8.2% by volume and 13% in terms of revenue. **Chablis wines posted double-digit growth**, up 26.4% by volume and 20.3% in terms of revenue.

This strong performance was in part due to a favorable euro/dollar exchange rate. But Bourgogne wine exporters are keeping a keen eye on possible changes in taxes on alcohol and other levies.

Canada, 4th biggest market by volume and 5th in terms of revenue (8 months 2018)

6% of total revenue from Bourgogne wine exports and 9% of total volumes.



Bourgogne wine revenues from Canada showed significant growth over the first eight months of 2018, increasing by 14.4%, driven by sales of red wines which were up 29.6% compared to the first eight months of 2017.

Régionale Bourgogne white appellations, the most exported category, **continued to perform well**: Up 12% by volume. They have shown continuous growth on this market for the past 10 years. Over this period, sales have gone from 1 million bottles (first eight months of 2005) to 1.4 million bottles (first eight months of 2018).

Crémant de Bourgogne performed well, up 19.2% by volume and 16.2% in terms of revenue.

Régionale appellations of the Mâconnais surpassed the record set in 2000 in terms of revenue, with 1.7 million euros (up 42.2%), with more than 317,000 bottles exported (up 48.6%) in the first eight months of 2018.

■ Southeast Asia continues to perform strongly

Over the first eight months of 2018, **overall revenue from Bourgogne wines in the three main Asian markets** (Japan, China, and Hong Kong), **continued to grow** (up 11%) with 6.9 million bottles exported (up 2.8%).

Japan, 3rd biggest market by volume and revenue (8 months 2018)

12% of total revenue from Bourgogne wine exports and 10% of total volumes.



Over the first eight months in 2016, 2017 and 2018, **exports of Bourgogne wines have been stable** at around 5 million bottles. For the first eight months of 2018, **Bourgogne wines showed growth of 1.5% by volume**, against a backdrop of a 4% fall in exports of all wines to Japan. **Régionale Bourgogne appellations have an important place in this market.** For the period, **these appellations accounted for 46% of exports by volume**, up 9.5% by volume and 21.7% in terms of revenue. **Chablis wines**, which accounted for 28% of total volumes exported to this country, also performed well, **up 8.8% by volume and 17.5% in terms of revenue.**

With albeit smaller volumes, **reds from the Régionale Mâcon appellation set a new record in terms of volume**, going from fewer than 40,000 bottles for the first eight months of 2017 to almost 200,000 bottles in the same period of 2018. Revenue also rose, totaling 1.8 million euros for the period.

China, 10th biggest market by both volume and revenue (8 months 2018)

3% of total revenue from Bourgogne wine exports and 2% of total volumes.



After a record by volume in the first eight months of 2017, exports of Bourgogne wines to **China** dipped 1.4%. They nonetheless **continued to grow in terms of revenue, up 12.7% over the first eight months of 2018.**

While red wines dipped 9.2%, **Bourgogne white wines continued to grow by volume**, up 21.4%. Both colors, however, grew in terms of revenue: Up 7.5% for red wines and up 28.6% for white wines, which are enjoying strong growth, notably thanks to the economic expansion in coastal cities.

Régionale Bourgogne white appellations (up 4.9% by volume, accounting for 45% of white wines exports) and **Chablis wines** (up 14.3% by volume, accounting for 22% of white wine exports) **contributed most to this growth.**

The **strong growth of Village and Village Premier Cru red appellations of the Côte de Beaune and Côte de Nuits** (up 23.7% by volume and 27.3% in terms of revenue) was not enough to compensate for the overall drop in red wine sales by volume.

Hong Kong, 13th biggest market by volume and 4th in terms of revenue (8 months 2018)

6% of total revenue from Bourgogne wine exports and 2% of total volumes.



Hong Kong confirmed its growth in terms of revenue, with an impressive 34% increase.

Red wines were driving growth in this territory in the first eight months of 2018, with rise of 28.3% by volume.

The **AOCs of the Côte de Beaune and Côte de Nuits** continued their strong growth by volume, up 44.4% on the first eight months of 2017.

Régionale white Mâcon appellations soared 60% by volume, and were up 15.3% in terms of revenue.

Taking red and white together, **Régionale Bourgogne appellations** were up 41% in terms of revenue to 11.3 million euros for the first eight months of 2018.

■ The European market: One of contrasts

In the first eight months of 2018, **overall revenue from Bourgogne wines in four key markets of Europe** (United Kingdom, Belgium, Sweden, and Norway) **were stable** at 131.8 million euros (up 0.3%), with 16.3 million bottles exported.

United Kingdom, 2nd biggest market by volume and revenue (8 months 2018)

14% of total revenue from Bourgogne wine exports and 16% of total volumes.



Against the backdrop of uncertainty surrounding Brexit, exports of Bourgogne wines to the United Kingdom slipped 7.6% by volume in the first eight months of 2018, while revenue dipped 0.7%.

White wines still dominate Bourgogne exports to the United Kingdom (78% of volumes exported), despite the country mainly importing red wines.

The drop in volume chiefly involved two groups of white AOCs: Chablis (down 20.3% on first eight months of 2017), and which accounted for 34% total white exports, and *Régionale* Mâcon appellations (down 4.4%), which accounted for 35% of white exports.

The appellations of the Côte de Beaune and Côte de Nuits also dipped by volume (down 6.5%), but were up slightly in terms of revenue (up 1.7%).

One can also **note the strong growth of Régionale Bourgogne appellations:** Up 35% by volume and 30.8% in terms of revenue.

Belgium, 5th biggest market by volume and 7th in terms of revenue (8 months 2018)

4% of total revenue from Bourgogne wine exports and 8% of total volumes.



Exports of Bourgogne wines in the first eight months of 2018 were down 1.7% by volume and 4.1% in terms of revenue, after an upturn in Bourgogne wine sales on this market in 2017.

Régionale Bourgogne appellations showed healthy growth, up 6.2% by volume and 9.8% in terms of revenue.

Crémant de Bourgogne recorded double-digit growth: Up 54.9% by volume and 40.7% in terms of revenue.

These figures do not however include Bourgogne wines taken home by many Belgians who visit the Bourgogne region (leading foreign clientele for wine-related tourism – source: *Bourgogne Tourisme 2010*) or cross-border purchases.

Sweden, 6th biggest market by volume and 8th in terms of revenue (8 months 2018)

3% of total revenue from Bourgogne wine exports and 6% of total volumes.



Sweden posted good growth in terms of revenue for the first eight months of 2018 (up 11.2%), thanks to a resumption in sales of **Régionale Bourgogne appellations**. Reds

were up 8.7% by volume and 4.7% in terms of revenue, while whites were up 5.7% by volume and 8.3% in terms of revenue.

Crémant de Bourgogne continued to gain market share (26% of all Bourgogne wines exported to this country in the first eight months of 2018), up 25% by volume and 26% by revenue.

Norway, 14th biggest market by volume and 16th in terms of revenue (8 months 2018)

Sales of Bourgogne wines continued to grow in the stores of the state monopoly, setting a new revenue record in 2017 (up 11.7% over 2016), with growth by volume of 5.8% (the equivalent of 2.55 million 75cl bottles, of which 32% was Bag-In-Box®).



Two-thirds of these sales were made up of white wines, despite them falling back 1.1% in 2017. The losses due to poor weather that impacted the wines of Chablis (two-thirds of white wine sales, down 8%) and Saint-Bris (down 56%) were almost compensated by the **growth in sales of Régionale Bourgogne white AOCs** (up 23%), **Mâconnais wines** (up 56%), and **Village wines of the Côte de Beaune**.

On the other hand, **sales of red wines continued to grow by volume** (up 24%). **Régionale Bourgogne appellations accounted for the majority of sales and growth** (two-thirds of total volumes), but there was also an increase in sales of **Village AOCs** of the Côte de Nuits and Côte de Beaune.

Sales of Crémant de Bourgogne also set a record, up 16% by volume.

Source: *Vinmonopolet, full year 2017*.

Table of Bourgogne wine exports

(Total for first eight months of 2018 over 2017 - Sources: BIVB/Customs)

Destination	In thousands of 75cl bottles			In thousands of euros		Variation in value - over previous year
	Total for the first 8 months of 2018	Total for the first 8 months of 2017	Variation in volume - over previous year	Total for the first 8 months of 2018	Total for the first 8 months of 2017	
Total of the exportations	52 518	50 876	3,2%	593 071	554 222	7,0%
United States	11 641	10 994	5,9%	143 038	134 197	6,6%
Great Britain	8 169	8 840	-7,6%	82 951	83 566	-0,7%
Japan	5 034	4 961	1,5%	69 808	68 957	1,2%
Canada	4 631	3 939	17,6%	34 252	29 929	14,4%
Belgium	4 198	4 272	-1,7%	23 760	24 783	-4,1%
Sweden	3 247	2 936	10,6%	18 885	16 975	11,2%
Germany	2 111	2 069	2,0%	17 366	16 212	7,1%
Nederlands	1 903	1 801	5,6%	13 106	12 500	4,8%
Denmark	1 294	1 248	3,7%	13 887	11 744	18,3%
China	1 061	1 077	-1,4%	14 942	13 257	12,7%
Switzerland	985	990	-0,6%	23 840	20 647	15,5%
Asutralia	968	891	8,6%	11 769	11 608	1,4%
HongKong	797	668	19,3%	38 537	28 790	33,9%
Norway	732	787	-7,0%	6 186	6 033	2,5%
Taiwan	389	306	27,0%	12 123	11 343	6,9%
Italia	382	313	21,9%	5 879	4 432	32,7%
South Korea	366	294	24,3%	5 592	4 672	19,7%
Ireland	351	437	-19,7%	2 244	2 634	-14,8%
Singapore	320	289	10,6%	7 570	7 384	2,5%
United Arab Emirates	276	327	-15,4%	4 280	4 149	3,2%
Israel	274	237	15,7%	2 664	2 254	18,2%
Brasil	243	239	1,9%	2 128	2 184	-2,6%
Spain	232	265	-12,4%	3 499	3 401	2,9%
Lithuania	229	110	107,3%	1 987	1 068	86,1%
Finland	175	139	26,2%	1 155	1 035	11,6%
Thailand	162	128	26,1%	2 603	2 010	29,5%
Mexico	157	164	-4,3%	1 526	1 400	9,0%
Russia	150	128	17,2%	2 458	2 049	20,0%
Letva	128	116	10,1%	1 215	1 197	1,6%
Luxembourg	121	137	-11,3%	1 872	2 077	-9,9%
Poland	115	192	-40,3%	949	1 162	-18,3%
Austria	95	102	-6,7%	1 904	1 811,93	5,1%

Note: The data for Norway are incorrect. Some of the exported volumes are missing in the figure reported here

France: Bourgogne wines well represented on traditional circuits

On the French market, one can observe various changes in food and drink consumption that are impacting the wine market. **Consumption outside the home is growing**, for breakfast, lunch and dinner (up 14% in three years). At the same time, **meals in the home are becoming simpler**, with a **focus on the main dish and the gradual disappearance of starters**. People are increasingly having dinner aperitifs, which sometimes replace the evening meal. Another key factor is a move towards **consuming less, but opting for products that are more healthy**.

■ Supermarket circuit dynamic for Bourgogne white wines

Over the first eight months of 2018, sales of Bourgogne still wines in French supermarkets were stable by volume (up 0.3%, an increase of 47,000 bottles on the same period in 2017), with slight growth in terms of revenue (up 2.8%). Some 14.55 million bottles were sold (excluding drive-thru, discount and convenience stores), **for record revenue** of 115.8 million euros.

White wines were up 3.4% by volume, thanks to *Village* appellations of the Mâconnais: Up 11.7% for Viré-Clessé and 8.9% for Saint-Véran. *Régionale* appellations also performed well over the period, especially Bourgogne Aligoté, which was up 8.4%. The wines of Chablis made a comeback, notably the Petit Chablis appellation, which increased by 8.2%.

Red wines dropped back 4.7% by volume. One should, however, note the healthy growth of Coteaux Bourguignons (up 11.2%) and the Mâcon red appellations (up 4.1%).



The Bourgogne wine region, along with the Beaujolais, are the only two French AOCs that maintained any growth, while overall sales in this category on this circuit were down (down 4.8% for white wines and down 7.4% for reds in the first eight months of 2018).

This robust performance by Bourgogne wines is in part due to **the modest rise in average prices, in conjunction with good value for money**.

In the category of French sparkling AOC wines selling more than 4 million bottles, Crémant de Bourgogne was one of the top performers by volume (up 4.6%) **and in terms of revenue** (up 6.4%).

That said, the market was not favorable, with stagnation in sales of sparkling wines (up 0.1% by volume for the first eight months of 2018), with French AOCs not faring any better (down 0.9% by volume but up 1.5% in terms of revenue).

■ Bourgogne wines sales continue to grow in specialist stores and restaurants

Restaurant

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

Fifty percent of the offer of Bourgogne wine in bottles was made up of **Village and Grand Cru appellations of the Côte de Beaune and Côte de Nuits**. By contrast, the offer of Bourgogne wine by the glass was concentrated on **Régionale and Village whites, from Chablis and the Mâconnais**.



The Centre-East and Paris regions account for 50% of the offer of Bourgogne wines on this circuit. It is proportionally the most widely available wine in the Paris region, along with Champagne.

In restaurants with table service, indicators were once again positive after five difficult years. Confidence within the profession has risen noticeably since the start of 2017 (5.8 out of 10 expressing optimism in September 2017, the figure having stagnated at around 5.0 for several years). Besides an increase in footfall, a rise in average spend to 29.70 euros is good reason for restaurateurs to be confident in the sector's performance.

- As in 2015, more than one-in-two restaurateurs reported stability in sales of Bourgogne wines overall (52.9%, compared to 53.2% in 2015).
- Some 30% reported a fall in sales of Bourgogne wines in 2016 (30.5% in 2015). Of those, 16% estimated the fall at more than 5%. Meanwhile, 17% reported increased sales of Bourgogne wines in 2016 (16.3% in 2015). Of them, 6% estimated that this increase was more than 5% (*source: 2016 survey*).

Specialist wine stores

91% of the sample group (704 specialist wine stores over the period 2015-2016) offered at least one Bourgogne wine reference. Bourgogne was the leading French wine region (20% of the offer), notably thanks to the large number of wines on offer in specialist stores in its region of production (62% of the offer in Bourgogne Franche-Comté).

Bourgogne dominated in terms of white wines, with a presence among 91% of specialist stores and a far greater number of references than for other wine regions.

Among red wines, Bourgogne was the second wine region after Bordeaux, with 18% of the offer (compared to 23.5% for Bordeaux).

In the category of **sparkling wines**, Crémant de Bourgogne could be found in **35% of the points of sale surveyed**.

It was dominant in its region of production, and enjoyed a strong presence in the regions of Ile de France and Grand Est (Champagne, Alsace and Lorraine) - *Source: 2015-2016 survey.*



© BIVB / Sébastien NARBEBURU

Economic report produced by the BIVB's Markets and Development Department - September 2018

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



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The interior of the Cités des Vins in Mâcon and Chablis is taking shape

After having picked the architects for the Cité des Vins sites in Mâcon and Chablis, the Bourgogne Wine Board (BIVB) has now named the Paris-based agency Studio Adeline Rispal as scenographer for the two sites.

Studio Adeline Rispal was selected from 26 applicants and will be charged with designing the content for the two Cités, establishing the identity of each, and conveying the messages to be shared about the wines and *Climats* of the Bourgogne region through the visitor experience.

The project management team is now in place. The next step will be widening out the content with the architects, with synergy and cohesion the keywords for the project.

The scenographer: A single actor to hone the identity of each site

Launched at the end of May, the call for applications for scenographer for the Cité des Vins in Chablis and Mâcon has now reached its conclusion. The jury, mainly made up of wine-industry professionals, studied the 26 submissions, establishing a shortlist of three for the final selection. The three finalists presented their candidatures in early November.

The verdict was unanimous, with the panel agreeing to award the commission to Studio Adeline Rispal. This Parisian agency was founded in 2010 by Adeline Rispal, and focuses its activity on cultural and heritage-based projects. The agency's submission fit perfectly with the values of the wines and *Climats* of the Bourgogne region, with a concept involving the idea of transposing the geological strata of the *terroir* to the esthetic of the two sites (see photo below). This will create a harmonious identity and common feel, whilst preserving a discourse unique to each territory.

The scenographic proposal for the future Cité des Vins et Climats in Chablis



A patchwork of landscapes, varieties, and terroir ©BIVB/Studio Adeline



Immersion in the vines ©BIVB / Studio Adeline Rispal

Scenographic project for the future Cité des Vins et Climats in Mâcon



Immersion in the vine ©BIVB / Studio Adeline Rispal



The complexity and subtlety of the wines ©BIVB / Studio Adeline

The role of the scenographer

Having a single reference point is a condition for the success of the Cité des Vins et des Climats de Bourgogne and must bring coherence and synergy to the overall project whilst defining specific content for each place.

The scenographer's missions include:

- Transposing the key messages about the wines and *Climats* of the Bourgogne region into the visitor space
- Creating drama within the spaces and establishing a common feel
- Breathing life into the visitor experience
- Suggesting coordination and communication tools that will underscore the identity of the sites
- Working in close partnership with the BIVB, the two architects, and the Association des Climats

The project management team is now in place and ready to start work on the three sites

The project management team is now complete. The BIVB's role involves overseeing the project which will be managed through a subsidiary, a status allowing it to benefit from patronage.

A reminder of the architectural projects selected in September

■ The Cité des vins in Chablis

The project combines the restoration of existing structures, a new extension, and a redesign of the outside space. The project requires a contemporary vision closely linked to the history of Bourgogne wines and integrated into an historic site, namely Le Petit Pontigny, the 12th-century cellars of the Abbey of Pontigny. The Atelier Correia Architectes & Associés in Saulieu, in the heart of Morvan national park, has been appointed for this project.



The proposal for the Cité des Vins et des Climats de Bourgogne in Chablis ©BIVB / Correia Architectes, Emmanuel

■ The Cité des vins in Mâcon

For the **Mâcon** site, the challenge is to ensure **unity between the existing buildings**, namely the BIVB's Maison des Vins and the Maison Mâconnaise des Vins. Audacity and creativity are key, in particular with regard to the creation of a unifying element, visible from the exterior, to bring the whole site together. **RBC Architecture & ACL Associés** based in Mâcon has been chosen to lead this ambitious project.



The proposal for the Cité des Vins et Climats de Bourgogne in Mâcon © BIVB / RBC Architecture

Next steps

End 2018: Launch of the call for tenders for a designer-constructor-architect for the Cité des Vins by the City of Beaune (project manager), in collaboration with the BIVB and the Association for the *Climats* of the Bourgogne Winegrowing Region

Summer 2019: Choice of the constructor-designer for the Beaune site

2019: Development of content with the architects and scenographer

End-2019: Work will begin on the three sites

Spring 2021: Opening of the three Cité des Vins et des Climats de Bourgogne sites

The Cité des Vins et des Climats de Bourgogne is a cultural and tourism project dedicated to Bourgogne, its wines, and its *Climats*.

The Cité des Vins et des Climats de Bourgogne will be accessible to all and extremely convivial, welcoming visitors to sites in Beaune, Chablis, and Mâcon through:

- ▶ Visitor trails through the Bourgogne landscape and *terroir* and explanations of the *Climats*, work in the vines, vinification, aromas, exploring all the diversity of Bourgogne wines
- ▶ Tasting workshops, learning experiences, multi-sensorial experiences, and an introduction to food and wine pairings
- ▶ Cultural exhibitions and conferences
- ▶ A boutique and information point for tourists

Follow the progress of the Cités at www.cite-vins-bourgogne.fr/en/



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Film: Winemaker in Bourgogne, an artisanal craft Discover the unique bond between people and the land

After one year of filming, resulting in 40 hours of footage and some 30,000 photos, the Bourgogne Wine Board (BIVB) is proud to present its latest short film in the series “Winemaker in Bourgogne, an artisanal craft”. This 13-minute film, entitled “The People and the Vines”, focuses on the growth cycle of the vine up until the harvest. Available in French and English, it is the first part of a diptych in which the main characters are the winegrower and the plant. A third protagonist, the grape, will make its appearance in the second part, “The People and the Wine”, which is currently being filmed, with delivery scheduled for spring 2019.

The film is essentially instructive, but with an emotional and poetic side to accompany each season. The viewer sees that Bourgogne wines are the fruit of a “hand-stitched” approach to reveal the characteristics of each *terroir*.

Understanding what is involved in the job of winegrower

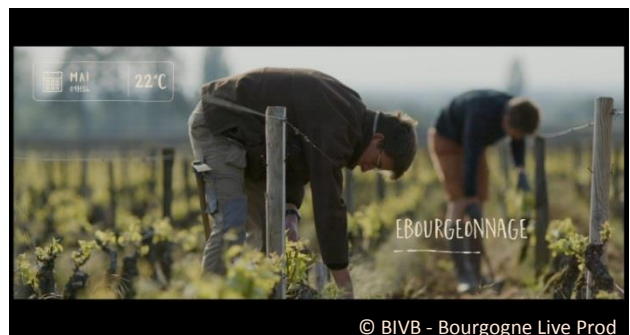
Produced by the BIVB, Bourgogne Live Production, and animation specialist Ludovic Caillot, this short film offers a unique insight into the job of the winegrower. It is a companion piece to the booklet “Understanding the World of the Winegrower”, published in June 2018, of which 21,000 copies have been distributed.

The first installment illustrates the know-how and techniques of the winemaker as they work in harmony with nature through the four seasons. Pruning, plowing, planting, debudding, tying-up: **14 key steps are presented.**

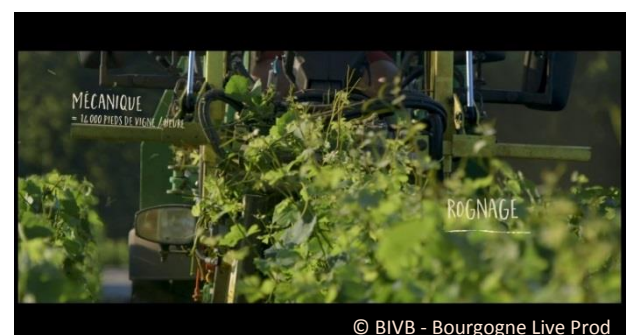
Instead of a classic narration, the film uses “motion design”, with educational information displayed via fixed or moving animations that help with reading the image.

One can read:

- ▶ The name of the task performed
- ▶ The purpose of each action
- ▶ The time of year, of day, and the temperature when each step was filmed
- ▶ The important elements to take away



© BIVB - Bourgogne Live Prod



© BIVB - Bourgogne Live Prod

A captivating film of discovery and learning



Far from the romantic ideal, discover the true work of the winemaker throughout the seasons. This unique bond between people and the land is what lies behind the wines of Bourgogne.

If you walk through the vineyards, you may well encounter men and women pruning, planting, or harvesting, and you will realize how much passionate they are about their work, and how much attention it requires throughout the year.

Here, the vineyards are the theater of meticulous care which has resulted in this patchwork landscape in which each plot expresses its character and its history. The film uses real-life winegrowers, not actors, who agreed to be filmed at work over the seasons as testimony to their unique know-how.

New techniques to follow the growth cycle of the vines

The first part, "The People and the Vines", was filmed between September 2017 and August 2018, on around 10 estates in the Bourgogne region.

The film uses the time-lapse technique to speed up movements like the passing of clouds by taking photos at regular intervals over a long period (almost 28,000 photos and 80 video segments).

This technique has been employed in the film to show the growth cycle of a single vine, from winter pruning through to fall. This vine was photographed daily in spring, and at least once a week for the rest of the year.



© BIVB - Bourgogne Live Prod

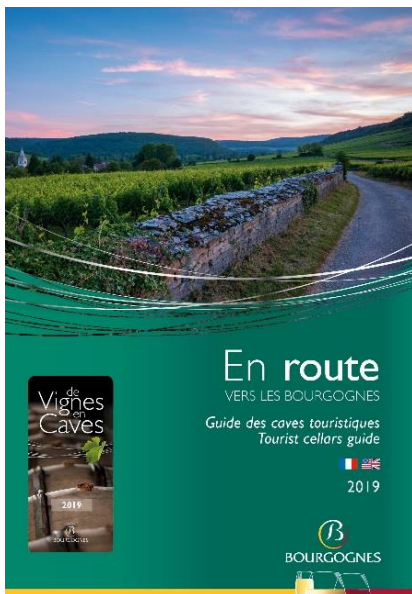
Watch the film on the BIVB's site: www.bourgogne-wines.com



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“En Route vers les Bourgognes”... ...for an unforgettable trip!



Whether you're a confirmed wine lover or just looking for something new with which to tempt your taste buds, the Bourgogne wine trade has come up with a thousand ways to introduce you to the secrets of the *terroir* and the magic of vinification.

Some 357 of them now feature in the 2019 edition of the “En Route vers les Bourgognes” guide, having signed up to the “De Vignes en Caves” welcome charter, created in 1991 by the Bourgogne Wine Board (BIVB). Each one of them is committed to making your trip an unforgettable and enriching experience.

Wine tourism is a trend that is close to our hearts in Bourgogne. That's why the BIVB offers a wide range of tools on the subject, and has produced a new edition of this guide every year since it was created. Published in both French and English, it has been designed to facilitate your research and help you plan a program tailored to meet your needs.

What is in the 2019 edition of the guide?

- **357 estates, producers, and co-ops that have signed up for the “De Vignes en Caves” charter**
The guide is packed full of **useful tips for visitors**, including languages spoken, opening hours, price ranges, details on meals and accommodation where offered, plus information on organic producers. **Cellars are classified by region** to help visitors quickly find the producers and wine trails they are looking for.
- **A map of the Bourgogne winegrowing region** listing key sites to visit across the region, with smaller maps of each wine route on the back. Produced in partnership with the Bourgogne-Franche-Comté tourist board.
- **New for 2019:**
 - A presentation of the project for the **Cité des Vins et des Climats de Bourgogne network**, which is set to open in 2021 in Beaune, Chablis, and Mâcon.
 - A reminder of how to take a **responsible approach to festivities**, part of our constant quest for conviviality and public safety.
 - A run-down of industry initiatives regarding **societal and environmental responsibility**, but also a call for tourists to be **more aware and show greater respect** from tourists towards those working in the vines.
 - The calendar of all **wine celebrations** is now only available digitally on the website www.bourgogne-wines.com to be updated regularly La mise en avant des initiatives de la filière en termes de **responsabilité sociétale et environnementale**, mais aussi un appel au **respect** des touristes envers les personnes qui œuvrent dans les vignes.

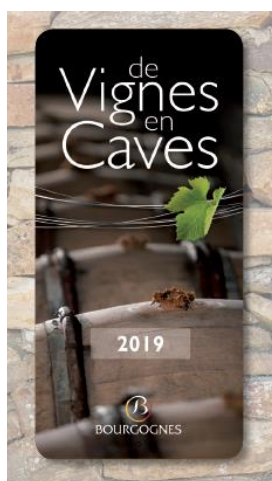
Plus all the essentials you need

- **85,000 copies are available from around 800 outlets in the Bourgogne-Franche-Comté and Auvergne-Rhône-Alpes regions**, including tourist offices, regional and departmental tourist organizations, hotels, campsites, *gîtes*, freeway tourism information points, and train stations and airports in Lyon.
 - **Printed in both French and English**
 - **Free and available on demand** from the BIVB
 - **Practical and lightweight** (14.5 x 21cm, 32 pages) to slip easily into your bag
- **A digital version that can be downloaded from the "A Trip through the Vines" section of the Bourgogne wines website** or by visiting: <http://bit.ly/enrouteverslesBourgognes>
- **An infographics page** at the end of the guide with all the key figures pertaining to the Bourgogne winegrowing region
- A **presentation** of the different regions and their vines, the varietals, an introduction to the notion of the *Climats*, details about the "De Vignes en Caves" welcome charter and the "Vignobles et Découvertes" label, and of course, an invitation to take a deeper look into our wines at the **École des Vins de Bourgogne**.

"De Vignes en Caves" - the promise of some unforgettable tasting moments

Created 26 years ago by the BIVB, the "De Vignes en Caves" welcome charter seeks to improve the welcome tourists receive from producers. They will satisfy your curiosity by offering tips and revealing secrets about Bourgogne varietals, appellations, and history.

Signatories commit to:



- Guaranteeing a warm and personalized welcome, in foreign languages where possible
- Receiving visitors during specified opening times
- Displaying signs showing they have signed up to the charter
- Offering free tastings of at least one wine and having a clear price list if tasting more than one wine is to be paid for
- Informing visitors about the appellations on sale
- Take-away sales of a minimum of three bottles, and a shipping service for 12 bottles and over
- Providing information about the Bourgogne winegrowing region and the estate

Vignobles & Découvertes, a prestigious label

The national “Vignobles & Découvertes” label was created in 2009, to bring together everyone involved in wine tourism in a single territory. It is awarded by Atout France for a three-year period to a wine-related destination offering multiple and complementary tourism products, such as accommodation, food, cellar visits and tastings, museums, and special events. The label helps visitors to easily find certified activities along the Bourgogne wine trails.



Currently, there are eight zones that have been awarded the label in Bourgogne, jointly covering 600 offers, including 154 cellars:

- Beaune, de Corton en Montrachet
- Dijon Côte de Nuits
- Vignoble de Chablis
- Vignoble de l’Auxerrois
- Vignoble du Mâconnais
- Côte Chalonnaise
- Vignoble du Châtillonnais
- Vignoble du Tonnerrois

You can find a complete list of label-bearing service providers in Bourgogne by visiting: <http://bit.ly/vignoblesetdecouvertes>