

BOURGOGNE WINES

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THE **GRANDS JOURS EN CAVES**

15-19 MARCH 2021



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Grands Jours En Caves

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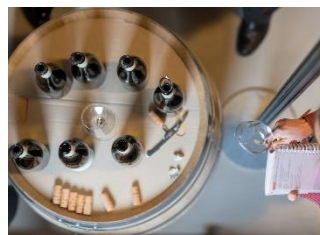
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15-19 MARCH 2021



Grands Jours En Caves

by appointment

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The Grands Jours En Caves: A unique way to stay in touch

Bourgogne, 16 March 2021

Almost 600 winegrowers and wine merchants have signed up for this exceptional event that runs from 15-19 March. They will offer a special welcome to journalists and professional buyers of Bourgogne wines, including restaurant-affiliated sommeliers, restaurateurs, wine storeowners, importers, wholesalers, and sales agents.

This weeklong event will give rise to some precious moments of conviviality that will allow us to stay in touch after a year under the shadow of COVID-19. It is a fresh opportunity to discover the latest vintages, in particular the amazing 2019 that is now coming to market.

A convivial and practical format that is adapted to the current health crisis

“We needed to adapt to the situation and offer a different format to avoid going for three whole years without an industry gathering. The last edition of the Grands Jours du Bourgogne was held in March 2018, and I am delighted to announce that the next one will run from 21-25 March 2022. We are already working on it, and we’re really looking forward to seeing our customers again and having them taste our wines from the most recent vintages along with having the chance to share these precious opportunities to connect,” said Raphaël Dubois, President of the Grands Jours de Bourgogne Association.

For this revised edition, all tastings will take place in the cellars. Attendees can make appointments directly with producers and other participants. A complete list of these is available right now from www.grands-jours-bourgogne.com, in the “Participating Cellars 2021” section. Some 600 producers have already signed up for this highly-anticipated event, committed to receiving visitors according to strict social distancing protocols.

An online version of the Grands Jours en Caves

This brand-new format has been put together in a matter of weeks, with a focus on digital communication. The online version is focused on the www.grands-jours-bourgogne.fr website and across social media.

- ▶ Creation of the Grand Jours en Caves private Facebook group that already has over 1,000 members, equally split between producers and market influencers, and which offers a unique forum for participants.
- ▶ A live booking system for tasting appointments which has really caught the industry’s attention, with producers redoubling their efforts to invite potential trade customers through personalized digital tools that have been specially developed for the event.

The various management organizations have worked together to offer four collective tastings and to present the wines of the following appellations: **Vosne-Romanée (Village)**, **Nuits-Saint-Georges (Village and Village Premier Cru)**, the **Climats of the Côte Chalonnaise**, and all the appellations of the **Mâconnais**.

The Grands Jours en Caves in figures:

586 participating producers, including:

- 5 cooperative cellars (1%)
- 36 *négoce* businesses (6%)
- 545 estates (93%)

Producers by region:

- Chablisien, Grand Auxerrois, and Châtillonnais: 128
- Côte de Nuits and Hautes Côtes de Nuits: 120
- Côte de Beaune and Hautes Côtes de Beaune: 166
- Côte Chalonnaise and Côtes du Couchois: 63
- Mâconnais: 109

This alternative was only possible thanks to the amazing support of the event's loyal partners: The Bourgogne Wine Board (BIVB), the Regional council of Bourgogne-Franche-Comté, the Departmental committees of the Côte-d'Or, Saône-et-Loire, and the Yonne, and Crédit Mutuel bank, which is sponsoring the event.

Share your tastings, impressions, recommendations, and photos of the Grands Jours En Caves via the #GrandsJoursEnCaves hashtag

Join us from 21-25 March 2022

www.grands-jours-bourgogne.com



Market Update

After stability in 2020, Bourgogne wines expected to return to growth in 2021

Bourgogne, March 2021

After a year that was buffeted by the Covid-19 pandemic, Bourgogne wines are now benefiting from an overall healthy economic situation. This is nonetheless being put to the test with each new set of measures, and 2021 still holds a great deal of uncertainty.

- Wine stock on estates has been buoyed by the good 2020 harvest, particularly for whites, and is slightly higher than the average over the past five campaigns.
- Transactions during the first six months of the 2020-2021 campaign were up, driven by the abundant 2020 harvest: Up 29% compared to transactions for the 2019 vintage, and up 19% on the average for the last five campaigns.
- The volume of Bourgogne wine exported maintained its growth in 2020, exceeding the equivalent of 90 million 75cl bottles (up 0.8% on 2019). Export revenue remained above one billion euros, despite a slight drop of 0.8% on 2019. The outlook for 2021 will depend largely on the measures imposed to halt the spread of Covid-19, along with administrative barriers, especially in the USA. The announcement on 5 March of the suspension of levies for four months pending the resumption of negotiations between the European Union and the Biden administration holds out the prospect of a significant upturn in terms of Bourgogne wine exports.



In France, Bourgogne wines have grown market share in local stores, supermarkets, and click-and-collect. In parallel, the Bourgogne region dominated the offer of white wines available to consumers in e-commerce, which has become a distribution channel with its own trends. A proportion of the sales usually made in restaurants seems to have shifted to specialist wine stores, but the reopening of restaurants is seen as key to ensure a full recovery of the French market.

Advance trade transactions: Stocks higher than average

For several years, the economic performance of Bourgogne wines has been globally positive. However, the various health measures linked to the more contagious variants of Covid-19 are having a sustained impact on the potential for growth on the various distribution circuits for Bourgogne wines, both in France and at export.

Demand is one of the variables in the equation of a healthy economic position. The other main variable relates to volumes available on estates (harvest plus stock resulting from wine leaving estates). As such, the balance was fairly good at the end of 2020.

■ 2020: A quality vintage with a rise in volume

Available stock among Bourgogne producers (winemakers and cooperative cellars) at the start of the 2020-2021 campaign (August 2020 to July 2021) was boosted by a larger harvest in 2020 than in 2019. That reestablished stock levels slightly above the average over the past five campaigns (up 3.6%).

With 1.558 million hectoliters, the 2020 harvest was up 6.9% on the average over the previous five years (2015-2019). White wines accounted for a record 64% of volumes.

The 2020 harvest in figures:

- ▶ 994,226hl of white wines, ex. VCI (up 13.5% on the average for the past five years)
- ▶ 362,971hl of red wines (down 12% on the average for the past five years)
- ▶ 5,161hl of rosés (down 24.2% on the average for the past five years)
- ▶ 196,084hl of Crémant de Bourgogne, inc. reserve (up 20.5% on the average for the past five years)

- **Harvest for white wines** (excluding VCI): Up 32.8% on 2019, but lower than the historic harvest of 2018.
 - ✓ **White *Régionale* Mâconnais wines** (24.7% of white volumes in 2020): Up 13.9% on the average over the past five years. With *Village* appellations, white wines of the Mâconnais accounted for 36.4% of Bourgogne white wines in 2020 (up 12.3% on the average over the past five years).
 - ✓ **Chablis appellations** (30% of white volumes in 2020): Up 16% on the average over the past five years.
- **Harvest for red wines** down 1.7% on 2019 and down 12% on the average over the past five vintages.
 - ✓ **Bourgogne *Régionale* appellations** (46.6% of red volumes in 2020): Down 9.2% on the average over the past five years.
 - ✓ **Mercurey and Mercurey *Premier Cru* appellations** (4.7% of red volumes in 2020): Down 23.5% on the average over the past five years.
 - ✓ **Bourgogne Hautes Côtes de Nuits and Bourgogne Hautes Côtes de Beaune wines** (13% of red volumes in 2020): Down 6.5% on the average over the past five years.
- **The volume of Crémant de Bourgogne** (including the inter-professional reserve) was up 51.4% on 2019 (the lowest year since 2012), and up 20.5% on the average for the past five vintages.

■ Wine leaving estates 2020-2021: Fluctuating according to waves

With a 2020 harvest greater than that of 2019, volumes of wine leaving properties for the first six months of the 2020-2021 campaign were unsurprisingly up by 7.9% on the same period in 2019-2020 (up 6.8% on the average over the first six months in the last five campaigns). That reflects the wine region's good economic situation.

- ✓ **Bulk transactions** from August 2020 to January 2021 were significantly higher than the previous campaign: Up 12.3% on the same period in 2019-2020, and up 8.2% on the average over the past five campaigns.
- ✓ **Sales of wine leaving properties in bottles** continued to hold firm compared to the same period of the previous campaign: Up 1.6%, accounting for 34.9% the total volume of wine leaving estates. This increase in bottle format was mainly driven by white wines:
 - **Mâcon-Village wines:** Up 3.2% on the first six months of the 2019-2020 campaign, for 10.9% of volumes.
 - **Bourgogne white:** Up 3.2%, for 9% of volumes.
 - **Pouilly-Fuissé:** Up 100%, for 5.9% of volumes.
 - **Chablis Premier Cru:** Up 7.6%, for 4% of volumes.

Several red appellations also showed growth:

- **Bourgogne Hautes Côtes de Nuits:** Up 11.3% on the first six months of the 2019-2020 campaign, for 5.2% of volumes.
- **Bourgogne Côte Chalonnaise:** Up 39.4%, for 3.74% of volumes.
- **Mercurey:** Up 16.9%, for 3.4% of volumes.
- **Gevrey-Chambertin:** Up 7.2%, for 3.9% of volumes.



This economic situation is nonetheless very fragile. The cumulated total for the three months from November 2020 to January 2021 showed a slowdown, underlining how the 2020-2021 campaign is highly dependent on the health and economic contexts.

■ 2020-2021 Transactions: Dynamic, reflecting the 2020 harvest

Transactions in the first six months of the campaign (August 2020 to January 2021) totaled 648,518hl for the 2020 vintage. That represents 91% of volumes sold across all vintages. The start of the campaign was up, like the volumes of the 2020 vintage: Up 29% on transactions for the 2019 vintage over the first six months of the 2019-2020 campaign (up 19% on the five-year average).

- ✓ **Transactions for grapes and must** were up 11% on the average for the past five campaigns. They accounted for 56% of transaction volumes for the first six months of the 2020-2021 campaign.
- ✓ **Transactions for wine** were up 21% on the average over the past five campaigns, for 42% of transaction volumes.

White wines and Crémant de Bourgogne were driving transactions during the period:

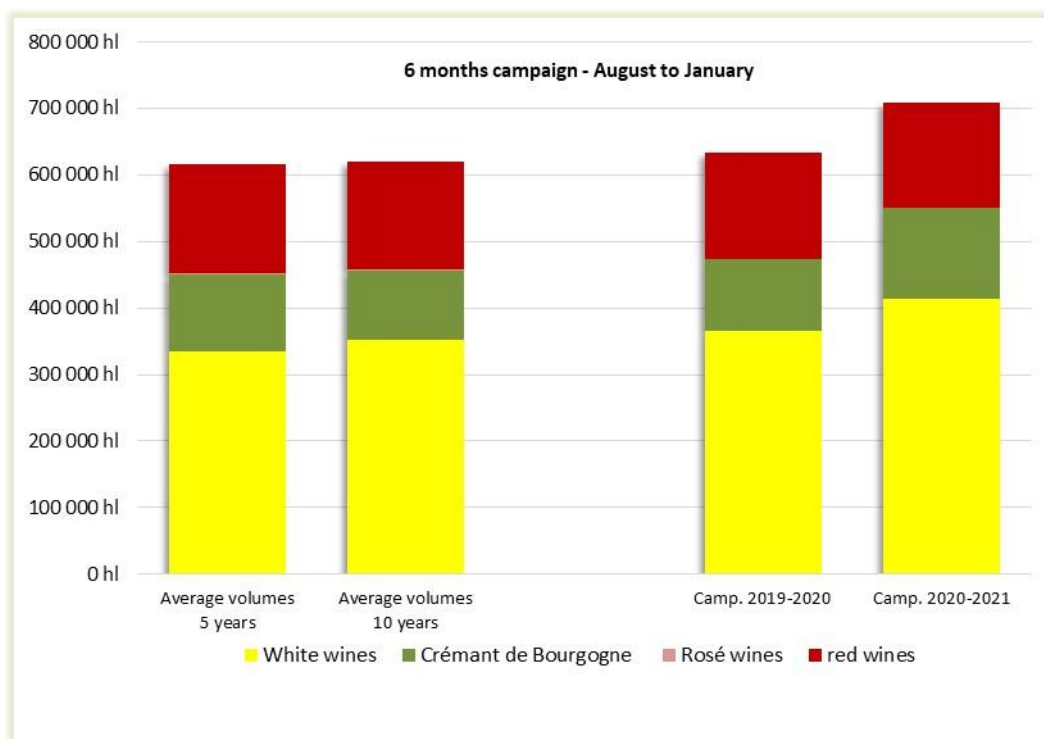
- ✓ **414,491hl of white wines:** Up 23.5% on the five-year average, for 58.4% of volumes.
- ✓ **157,551hl of red wines:** Down 3.8% on the five-year average, for 22.2% of volumes.
- ✓ **731hl of rosé wines:** Down 41.4% on the five-year average, for 0.2% of volumes.
- ✓ **136,389hl of Crémant de Bourgogne:** Up 19% on the five-year average, for 19.2% of volumes.

Overall, red wines were down in the first six months of the campaign, but certain appellations remained dynamic:

- ✓ **Bourgogne Hautes Côtes de Beaune:** Up 17.5% on the five-year average (9.9% of red volumes).
- ✓ **Régionale Mâcon wines:** Up 37% on the five-year average, with 4% of volumes.
- ✓ **Irancy:** Up more than 100% on the five-year average.

Transactions for all vintages of Bourgogne wines

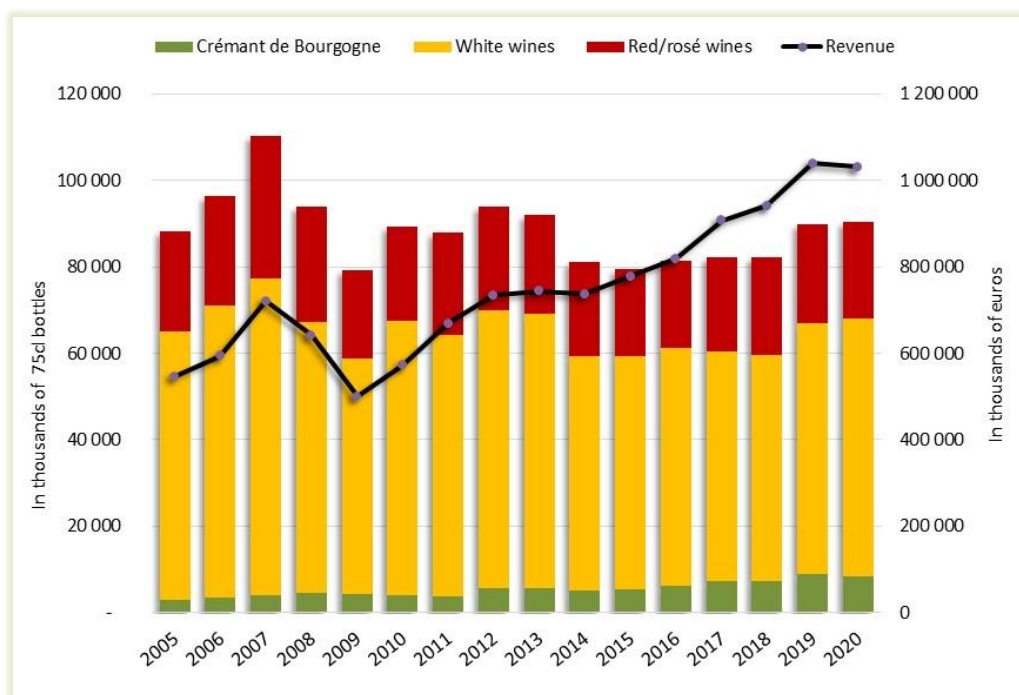
(Source: BIVB)



Exports: 2020 revenue still above one billion euros

In 2020, the volume of Bourgogne wine exports remained stable, despite the pandemic and after an exceptional year in 2019. More than 90 million 75cl bottles were exported (up 0.8% on 2019), for revenue of 1.031 billion euros (down 0.8% on 2019). Bourgogne wines are exported to 169 territories.

Timeline of Bourgogne wine exports
(Sources: Customs DEB+DAU - BIVB – full years)



Over the long term, growth by volume of Bourgogne wine exports was up 2.2% on the 15-year average. Although revenue stagnated in 2020, it showed strong growth on the 15-year average, up 42%.

Sales were driven by white wines: Up 2.7% by volume and 1.1% in terms of revenue (2020 over 2019), largely due to:

- **Chablis and Petit-Chablis:** Up 7.5% by volume and 5.7% in terms of revenue (30.5% of total volumes and 24.4% of revenue from Bourgogne white wines).
- **Régionale Mâcon wines:** Up 8.7% by volume and 1.8% in terms of revenue (21% of volume and 9.5% of the revenue from Bourgogne white wines).
- **Village and Premier Cru wines from the Côte de Beaune and Côte de Nuits:** Up 0.8% by volume and up 2.6% in terms of revenue (4.8% of volumes and 17.7% of the revenue from Bourgogne white wines).

■ **In 2020, nine of the 20 main markets contributed to stability**

The gravity of the waves of the Covid-19 pandemic and its variants, the speed with which vaccination strategies were put in place, and the vigorousness of health and economic policies are all factors in the list of countries that import Bourgogne wines and which helped maintain performance in 2020.

Of the 90.5 million bottles shipped in 2020, Europe (plus French overseas territories) accounted for 52% of export volumes, and 39% of the revenue. Sometimes offering few opportunities for growth in recent years, this region has proved very profitable for Bourgogne wines despite the pandemic: Up 10.8% by volume and 11.6% in terms of revenue compared to 2019.

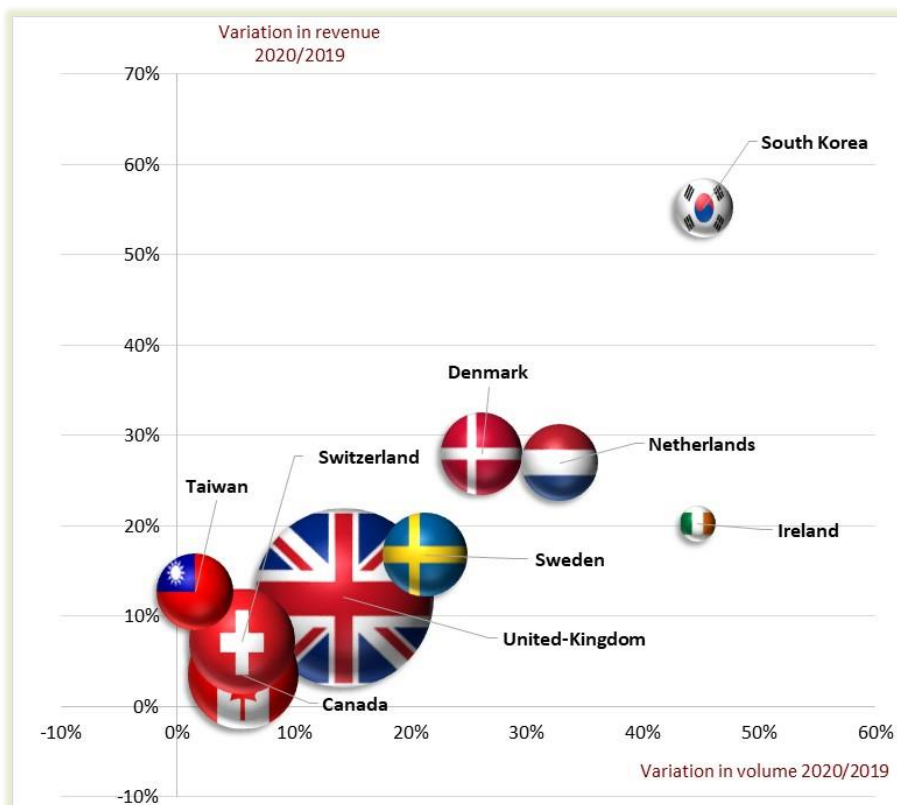
Territories outside the European Union that have been buoyant in recent years have, on the other hand, been more impacted by the situation: Down 8.4% by volume and down 7.3% in terms of revenue over 2019.

Nine territories out of the 20 main export markets for Bourgogne wines helped deliver stability. They accounted for 49% of export volumes, for 42% of the revenue:

- Six territories were in Europe (plus French overseas territories)
- Three were countries outside Europe

The nine territories with strongest year-on-year growth in 2020

(sources: Customs DEB+DAU - BIVB)



The size of the bubbles is proportional to 2020 revenue

■ Markets with diverse responses depending on health and economic strategies

United States, leading market in terms of revenue in 2020 (17% in terms of export revenue, for 17% of the volume of Bourgogne wines).



Change 2020 over 2019: Down 15.2% by volume and down 22% in terms of revenue.

After a very poor first half of 2020, hit by the dual impact of the “Trump tax” and the fallout from the pandemic, the second half of the year saw a certain upturn. Exports for the end-of-year festive season (fourth quarter 2020) were very buoyant for Bourgogne wines: Up 3.4% by volume and 5.6% in terms of revenue compared to the fourth quarter of 2019. This did not however compensate for losses earlier in the year.

All families of appellations were affected, with two exceptions:

- **Chablis and Petit Chablis** were up 2.8% by volume over 2019
- Among reds, **Irancy** was also up 60% by volume over 2019, although with relatively small quantities (around 62,000 bottles).

Struck by a double dip by volume (down 10.9%) and revenue (down 19.6%), Bourgogne white wines still accounted for 35% of the volumes of French AOC wines exported to the US, for 49% of the revenue in 2020.

On 5 March 2021, the new Biden administration announced the suspension for four months of the levies imposed as part of the conflict between Boeing and Airbus while trade negotiations resumed between Europe and the USA. This promising development hopefully opens the way for a rapid return for the leading export market for Bourgogne wines. Especially since after a difficult year, the International Monetary Fund forecasts growth of 5.1% in 2021 in the USA.

The United Kingdom, 2nd biggest export market in terms of revenue (16% in terms of revenue, for 19% of volumes).



Change 2020 over 2019: Up 14.3% by volume and 12% in terms of revenue

In 2020, the United Kingdom returned to its spot as the leading export market by volume, ousting the USA, after two consecutive years of growth.

This performance involved Bourgogne wines of all types:

- **White wines:** Up 14% by volume, for nearly 83% of the volume exported.
- **Red wines:** Up 12% by volume, just over 13% of the volume exported.
- **Crémant de Bourgogne:** Up 38% by volume, for almost 4% of the volume exported.

Bourgogne white wines accounted for 40% of the volumes of French white AOC wines imported to the UK, for 58% of the revenue in 2020.

Despite this strong performance, professionals in the Bourgogne wine sector remain attentive to any upsets in this highly competitive market. They are notably waiting to see whether fears of a “no deal” Brexit led to stockpiling since 2019, or if sales will remain at current levels. Concerns are also heightened because the UK is the worst-affected country in western Europe by Covid-19. Growth in GDP in the third quarter of 2020 fell 9% compared to 2019, with 570,000 jobs lost. However, a £270-billion recovery scheme, equivalent to 13% of GDP, and a trade deal with the European Union, Britain’s main trading partner, have led the OECD to forecast growth of 4.2%.

Japan, 3rd biggest export market in terms of revenue (11% of revenue export, for 8% of volumes).

Change 2020 over 2019: Down 3.3% by volume and down 1.6% in terms of revenue.



Bourgogne wines held up well on this market during the first part of the year, before falling back in the second quarter. Despite this context, certain Bourgogne appellations still showed growth:

- **Régionale Bourgogne appellations** (all colors): Up 8.8% by volume, for 51% of the volume exported, and up 12.5% in terms of revenue, for 45% of the revenue.
- **Chablis and Petit-Chablis**: Up 8.3% by volume, for 43.7% of the volume exported, and up 21.7% in terms of revenue, for 32.6% of the revenue.
- **Grand Cru wines of the Côte de Beaune and Côte de Nuits**: Up 28.8% by volume.
- **Irancy**: Up more than 100% by volume (24,000 bottles exported) and more than 100% in terms of revenue.

In 15 years, Bourgogne wines have seen healthy revenue growth in Japan: Up 53.3% (from 2005 to 2020), mainly driven by Régionale Bourgogne appellations, which saw revenue more than double.

In 2021, the situation remained uncertain. The world's third largest economy, Japan has been less impacted by the pandemic in terms of health outcomes than western countries. According to IMF forecasts, growth in 2021 should be around 3.1% thanks to government aid (12% of GDP) and the anticipated effects of the Olympic Games (last minute: as the Japanese government has just announced that the Olympics will be without an audience, these figures may be revised downwards).

China/Hong Kong, 4th biggest export market in terms of revenue (9% of export revenue, for 3% of volumes).



Change 2020 over 2019: Down 12% by volume, but up 1.2% in terms of revenue.

Bourgogne white wines continued to grow on these markets, which have traditionally been driven by red wines (92% of French AOC wines exported there are red): Up 4.1% by volume and 18.6% in terms of revenue on 2019.

These healthy figures were notably due to:

- **Régionale Bourgogne appellations**: Up 16.8% by volume, for 34% of bottles exported, and up 4% in terms of revenue, for 21.7% of the revenue from Bourgogne white wines.
- **Chablis and Petit-Chablis**: Up 16.6% by volume, for 22% of exports, and up 38.7% in terms of revenue, for 8.8% of the revenue from Bourgogne white wines.
- **Village and Village Premier Cru wines from the Côte de Beaune and Côte de Nuits**: Up 5.2% by volume, for 14.5% of exports, and up 26% in terms of revenue, for 26.7% of the revenue from Bourgogne white wines.
- **Village and Village Premier Cru wines from the Côte Chalonnaise**: Up 49.4% by volume and up 10.4% in terms of revenue.

Red wines, which made up just over 61% of Bourgogne wine sales on these markets, slipped back in 2020, down 20% by volume and down 18.6% in terms of revenue. Only *Village* and *Village Premier Cru* wines from the Côte de Nuits posted positive numbers: Up 4.4% by volume, for 15% of exports, and up 3.8% in terms of revenue, for 25% of the revenue from Bourgogne red wines.

Crémant de Bourgogne, which still only accounts for a small proportion of exports here (25,000 bottles, less than 1% of all Bourgogne wines), nonetheless showed strong growth, up 70% by volume and 97.4% in terms of revenue.

China recorded growth of 2.3% in 2020, which was much better than most other countries, but was at its lowest level for 40 years. Meanwhile, Hong Kong saw growth slide by 6.1%, having already dipped by 1.2% in 2019. The IMF predicts growth of 7.9% in 2021 for China, while for Hong Kong, predictions are for a rise of between 3.5% and 5%, depending on the political situation, the return of tourism, and consumer spending that has been buffeted by the pandemic.

Canada, 5th biggest export market in terms of revenue (6% of export revenue, for 9% of volumes).



Change 2020 over 2019: Up 5.7% by volume and up 3.5% in terms of revenue.

In 2020, Bourgogne wines were in top spot in terms of revenue (60.85 million euros, for a 20.5% market share in terms of revenue) among French AOC-exporting regions to Canada. The region was in third place by volume. For the past 15 years, Bourgogne white wines have been the leading exporter among French white AOC producers (41.8% of the volume exported, for 49.7% of revenue in 2020).

Many appellations benefited from this growth, which was mainly driven by the high-volume Bourgogne wines:

- **Régionale Bourgogne appellations** of all colors: Up 3.5% by volume, for 62% of the volume exported and 45% of the revenue (stable).
- **Chablis and Petit-Chablis**: Up 48.1% by volume, for 20% of exports, and up 43.3% in terms of revenue, for 19% of the revenue from Bourgogne wines.
- **Régionale Mâcon wines** of all colors: Up 23.3% by volume, for 4.8% of exports, and up 33.6% in terms of revenue, for 3.9% of the revenue from Bourgogne wines.

Despite a drop of more than 20% by volume and revenue compared to 2019, Crémant de Bourgogne remained the second-best selling French sparkling AOC in Canada.

Even the pandemic could not halt the growth in exports of Bourgogne wines on this market, despite Canada imposing similar health measures to other countries (total lockdown, curfew, partial closure of the border with the United States, etc.), and the economy shrinking by 5.5% in 2020. The IMF forecasts growth in GDP for Canada of 3.6% in 2021.

Belgium, 7th biggest export market in terms of revenue (5% of export revenue, for 9% of volumes).



Change 2020 over 2019: Down 1% by volume and up 5.4% in terms of revenue.

The limited dip in volume was due solely to Crémant de Bourgogne wines (down 24% on 2019). Sales of white and red wines continued to grow.

Despite performing less well than reds, Bourgogne white wines were still in top spot among French white AOC wines (31.8% of volumes and 42.7% of revenue). Strong performances to note include:

- **Régionale Mâcon wines**: Up 11.3% by volume over 2019, for 32.8% of all bottles of Bourgogne white wine, and up 12% in terms of revenue, for 21% of all revenue.
- **Village and Village Premier Cru wines of the Côte Chalonnaise**: Up 3.7% by volume and up 2.6% in terms of revenue.
- **Village and Village Premier Cru wines of the Côte de Beaune and Côte de Nuits**: Up 17.3% by volume and up 33.7% in terms of revenue.

Although Bourgogne red wines only accounted for 13.7% of the volume and 26.8% of revenue in Belgium, they were the most dynamic in 2020: Up 14.8% by volume and 12.7% in terms of revenue. This was notably due to:

- **Régionale Bourgogne appellations:** Up 18.1% by volume, for 58% of bottles exported, and up 15.8% in terms of revenue, for 24% of revenue.
- **Village and Village Premier Cru wines of the Côte de Nuits:** Up 10.3% by volume, for just under 9% of red wine exports, and up 21% in terms of revenue, for 21% of the total.
- **Grand Cru wines:** Up 36.4% by volume and 19.7% in terms of revenue.

None of these figures takes into account direct sales to Belgian tourists.

Like everywhere, the Belgium economy was greatly impacted by the pandemic. Lockdown at the end of 2020 and strict border restrictions played a major role in the 7.1% fall in GDP. For 2021, the IMF anticipates growth of 3.5%.

Sweden, 8th biggest export market in terms of revenue (3% of export revenue, for 7% of volumes).



Change 2020 over 2019: Up 21.3% by volume and up 16.8% in terms of revenue.

The pandemic did not halt the growth of Bourgogne wines on this market. In 2020, the Bourgogne region confirmed its leading position by volume among French AOC producers (6.5 million bottles sold, for a 28% market share) and second spot in terms of revenue (36 million euros, 24% of the market in terms of revenue). Wines of all colors recorded growth.

White wines accounted for 53% of the volume exported, for 55% of the revenue. With both volume and revenue up some 15% over 2019, this solid performance was driven by those white wines selling the largest volumes:

- **Chablis and Petit Chablis:** Up 11.6% for 48.6% of the volumes of Bourgogne whites, and up 8% in terms of revenue.
- **Régionale Bourgogne appellations:** Up 22.6% for 40.6% of the volumes of Bourgogne whites, and up 24% in terms of revenue.

Although Bourgogne red wines only accounted for 15% of the volumes exported in 2020, they played an active role in growth in this country: Up 14.5% by volume and 20.5% in terms of revenue over 2019.

Crémant de Bourgogne wines also continued to grow: Up 37.9% by volume and 18.7% in terms of revenue. They accounted for 31.7% of the volume exported.

Sweden did not impose the same strict lockdown as most other European countries, which allowed economic activity to continue almost as normal. Despite the economy contracting 3.4% in 2020 the IMF forecasts growth in GDP of 3.3% this year.

Denmark, 9th biggest export market in terms of revenue (3% of export revenue, for 3% of volumes).



Change 2020 over 2019: Up 26.1% by volume and up 28% in terms of revenue.

Exports of Bourgogne wines were up despite the pandemic. In 2020, Bourgogne became the number-one selling French AOC wine both in terms of volume (3.1 million bottles, 23% market share by volume) and revenue (33.8 million euros, 30.6% market share in terms of revenue).

Bourgogne white wines accounted for 60.5% of the volume exported, for 49.5% of all revenue from Bourgogne wine. They showed strong growth by volume (up 30.5% over 2019) and in terms of revenue (up 33.7%), mainly driven by:

- **Chablis and Petit Chablis**, the largest sellers by volume: Up 30%, for 43.6% of the volume of Bourgogne white wines.
- **Régionale Bourgogne appellations**: Up 38%, for 29% of Bourgogne white wines.

Red wines also performed well, despite only making up 20% of the volumes exported. They actively contributed to the growth of Bourgogne sales in Denmark: Up 30% by volume and 25.6% in terms of revenue.

Four families of appellation recorded notable growth:

- **The Bourgogne AOC**: Up 38%, for almost 61% of the volumes of red wines exported, and up 48.5% in terms of revenue.
- **Village and Village Premier Cru wines of the Côte de Nuits**: Up 30.5% for just over 16% of total red volumes, and up 32.6% in terms of revenue.
- **Village and Village Premier Cru wines of the Côte de Beaune**: Up 15% for almost 15% of volumes (down 1.8% in terms of revenue).
- **Grand Cru red wines**: Up 12.8% by volume and 28% in terms of revenue.



Crémant de Bourgogne, which accounted for 19.5% of volumes, continued to grow: Up 11.3% by volume and 9.6% in terms of revenue.

Export figures for Bourgogne wines in 2020 in main markets

(Source: Customs DEB+DAU - BIVB)

Bourgogne wines exports	Market share in 2020		Exports in 2020		Variation 2020/2019	
	Volume	Revenue	x 1,000 75cl bottles	x 1,000 Euros	Volume	Revenue
Total			90 504	1 031 222	0,8%	-0,8%
United Kingdom	19%	16%	17 091	163 951	14,3%	12,0%
USA	17%	17%	15 769	175 897	-15,2%	-22,0%
Canada	9%	6%	8 162	60 848	5,7%	3,5%
Belgium	9%	5%	7 989	47 947	-1,0%	5,4%
Japan	8%	11%	7 287	111 201	-3,3%	-1,6%
Sweden	7%	3%	6 505	36 059	21,3%	16,8%
Netherlands	5%	3%	4 784	29 723	32,9%	27,0%
Denmark	3%	3%	3 122	33 821	26,1%	28,0%
Germany	3%	3%	2 781	29 984	-25,4%	-9,8%
Switzerland	2%	6%	1 784	57 184	5,5%	7,2%
China	2%	3%	1 638	28 916	-18,8%	0,3%
Australia	2%	2%	1 370	17 933	-14,2%	-1,8%
Hong Kong	1,3%	7%	1 160	67 951	-0,6%	1,6%
Ireland	1,2%	0,6%	1 089	6 227	44,7%	20,2%
South Korea	1,1%	1,7%	996	17 179	45,3%	55,2%
Taiwan	0,8%	3%	709	29 422	1,5%	12,7%
Italia	0,7%	1,1%	660	11 303	-5,4%	-1,4%
Israel	0,7%	0,5%	649	5 494	43,7%	53,1%
Singapore	0,6%	2%	503	18 795	-8,3%	8,6%
Brazil	0,5%	0,4%	473	4 574	15,5%	20,8%
Lithuania	0,4%	0,3%	402	3 091	31,0%	24,0%
Maroco	0,4%	0,2%	353	2 149	126,0%	69,8%
Poland	0,4%	0,3%	348	3 175	21,7%	56,1%
Finland	0,4%	0,2%	345	2 299	5,7%	19,0%
Spain	0,4%	0,6%	334	6 006	-34,0%	-21,6%
Latvia	0,4%	0,3%	331	2 927	23,3%	24,0%
United Arab Emirates	0,3%	0,3%	290	3 478	-47,0%	-59,5%
Luxembourg	0,3%	0,5%	282	5 592	12,0%	29,2%
Czech Republic	0,3%	0,3%	251	2 746	27,5%	15,2%

France: 2020 driven by e-commerce, local stores, and click-and-collect

Against a backdrop of public health and economic uncertainty in 2020, Bourgogne wines managed to largely maintain their market share on those distribution circuits which remained open. While some outlets such as eat-in restaurants remained closed, the Bourgogne sector continued to invest to help relaunch these distribution circuits. Although there are no statistics to confirm the tendency, many companies have reported solid activity throughout 2020 with specialist wine stores.



■ E-commerce: Bourgogne wines in pole position in terms of offer

With 507 sites in France, the online wine market is highly competitive. Even before the pandemic, it had entered the mature phase, after 10 years of strong growth.

This market, which was in its infancy a decade ago, has today become a key distribution channel for wine. In France, e-commerce in 2019 accounted for around 10% of sales of still and sparkling wines, with year-on-year growth of 6.9% (before the arrival of the Covid-19 health crisis).

Fresh consumers are continually being attracted by the ease of online purchasing and the diversity of the offer. In this context, consumer behavior is driven by the desire to find products that are immediately available at the best price.

In this sector, and on the basis of 65,106 references, Bourgogne wines in 2020 showed a breakdown by color identical to that of the offer in 2018:

- ✓ **58% of references were red wines**
- ✓ **42% were white wines**

Bourgogne wines accounted for 16% of the total offer (in second position among French AOCs), in:

- ✓ **First place** in terms of the offer for Bourgogne white wines with a 31.4% share
- ✓ **Second place** for red wines, with a 14% share of the offer

Among the online offer of sparkling wines (6,092 references), 84% were Champagnes. Crémant de Bourgogne accounted for just 2% of the sparkling offer on this circuit.

■ Supermarkets: Bourgogne wines remained buoyant despite the context

After several years of decline, sales of still wines in the supermarket sector in France (including hyper- and supermarkets, local stores, click-and-collect, and discounters) bounced back slightly by volume, up 1.1% in 2020 on the previous year, perhaps benefiting from the closure of other outlets.

Sales of still French AOC wines ended the year down 0.7% by volume, despite strong growth for wines of all regions in the bag-in-box format.

In this moribund context, Bourgogne wines continued to be the exception:

- With robust growth of 5.6% by volume and 6.9% in terms of revenue compared to 2019, the Bourgogne region was the only wine region to show growth in recent years.
- It was one of only two regions that showed growth in sales of 75cl bottles.

Sales of Bourgogne wines were stable in hypermarkets, but were up by 9% in supermarkets, 12% in local stores, and 67% in click-and-collect.

Bourgogne white wines were up 7% by volume on 2019, with notable gains for Bourgogne Aligoté (up 4.6%), the Bourgogne AOC (up 3.4%), Chablis (up 15.9%), Pouilly-Fuissé (up 9.3%), Saint-Véran (up 17.4%), Saint-Bris (up 9.9%), and Montagny (up 6.9%).

Red wines also fared well, up 2.7% by volume. This was driven by Bourgogne AOC (up 4% on 2019), Bourgogne Hautes Côtes de Nuits (up 13%), *Régionale* Mâcon (up 4%), and *Village/Village Premier Cru* wines of the Côte de Beaune (up 10%). Only the Coteaux Bourguignon appellation lost ground (down 5%).



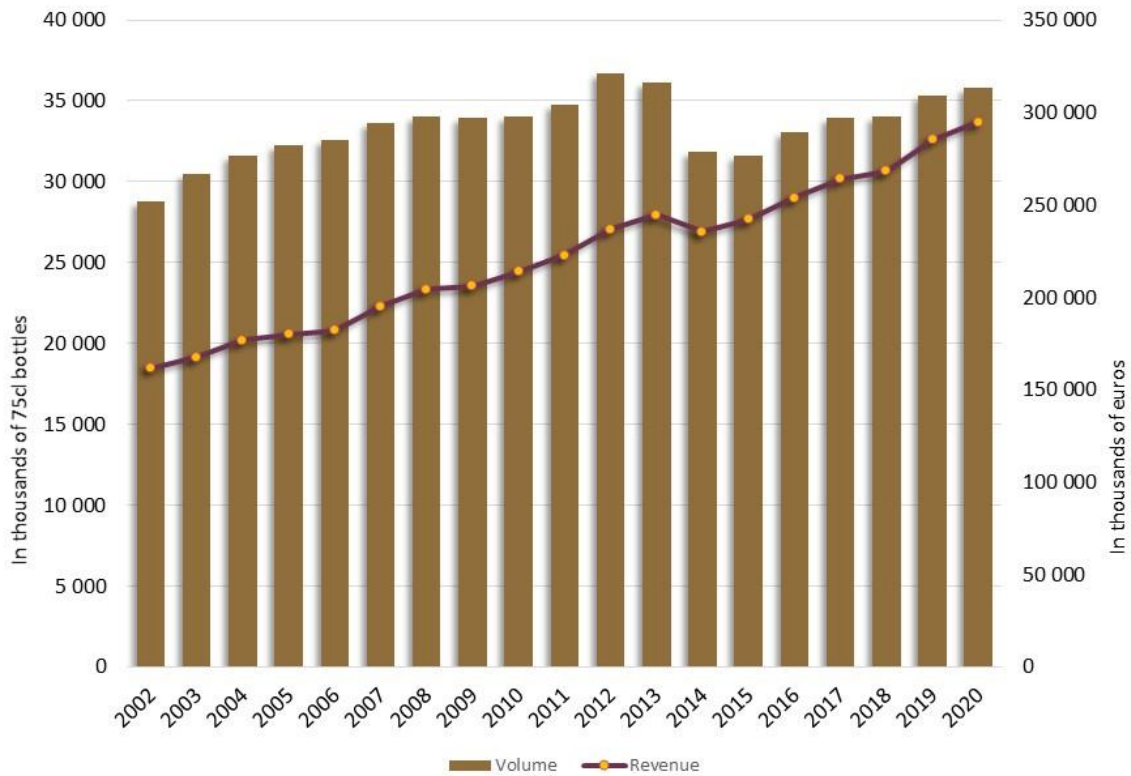
© BIVB / Image & Associés

Overall sales of sparkling wine from around the world (including in French supermarkets, local stores, click-and-collect, and discounters) fell back 7.3% by volume and 4.9% in terms of revenue in 2020 compared to 2019. The year was more difficult for French sparkling wines, apart from Champagne, which were down 11.6% by volume and down 11.5% in terms of revenue.

Crémant de Bourgogne was in line with this trend, down 10% by volume and 9.6% in terms of revenue, after several years of sustained growth.

Change in sales of Bourgogne wines in French supermarkets

(source: IRI HM and SM/BIVB – Still and sparkling wines)



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

(Sources: Customs, CAVB, FDAC, GTI, IRI, XERFI, CSA, BIVB)



CITÉ DES VINS & DES CLIMATS DE BOURGOGNE

CHABLIS • BEAUNE • MÂCON

Destination Cité 2022: Work to start in 2021

16 March 2021

After several years of reflection and conception, the project for the Cité des Vins et des Climats de Bourgogne network embarks on the creation phase under its newly-elected president.

► Strengthened governance

The governance of the Association for the Cité des Vins et des Climats de Bourgogne will be further strengthened in 2021. François Labet and Louis-Fabrice Latour, who have headed up the body since its creation in June 2019, are now joined by a new president, Benoît de Charette, who was appointed at the most recent General Assembly on 17 February. As vice-presidents, they will still remain very involved in the project.



Benoît de Charette is a well-known figure in the industry and comes from a family of winemakers. He took over the family estate in Dracy-lès-Couches in 1983. At the same time, he became director of the Fédération des Négociants-Eleveurs de Grande Bourgogne (FNEB) in Beaune. In 1991, Benoît de Charette joined the Albert Bichot wine house in Beaune as director general, and has remained in the post for the past 30 years.

Between 2000-2004, he joined the Chambre de Commerce et d'Industrie in Beaune, and was promoted to president. In parallel, he has presided over the Markets and Development and Marketing-Communication commissions of the Bourgogne Wine Board (BIVB). Between 2008-2017, he was president of the Chambre de Commerce et d'Industrie Régionale (CCIR).

Benoît de Charette was one of the first ambassadors for the campaign to support the inclusion of the *Climats* of the Bourgogne winegrowing region on the UNESCO World Heritage List, and today, he is one of the administrators of that body.

With experience like this, Benoît de Charette has all the skills to accompany the Cité des Vins et des Climats de Bourgogne project, both in terms of its creation and its strategy, with regard to areas such as corporate relationships and the patronage campaign.

► Work on the three sites will be staggered over the first half of 2021

The first stones will be laid, one after the other, during the first half of the year, along with partner authorities.

- **The Cité in Beaune** started the process with construction beginning with the first stone laid, in conjunction with the city of Beaune and the Rougeot group, on 12 March.
- **The Cité in Mâcon** will lay its first stone on 29 March, with work starting at the end of April.
- **The Cité in Chablis** has just been granted its construction permit with work due to start this summer.



These key moments mark the start of work, but they only come after a great deal of effort in organizing calls for tender for the construction aspect and the scenography, carried out in parallel.

The choice of contractors and service providers who will help with the construction and the creation of the visitor experience will soon be unveiled. More than 60 different businesses will be involved in the creation of these three Cités.

► Three buildings, each with a unique architectural signature

The three Cités offer different feels, both in terms of their geographical situation, their size, and their architectural approach and style. But they all share the same aim: To promote the culture of winegrowing in Bourgogne with as many people as possible, through a wide range of offers and services focusing on the world of vines and wine.

The Rougeot group and architect Emmanuelle Andréani, from Lyon-based SIZ'-IX Architectes, will be driving the 3,600m² construction of the Cité in Beaune. A contemporary gem, the building takes its inspiration from a vine tendril winding its way around a post, and will stand at 24 meters high, offering views across the vines from its panoramic terrace.





In Chablis, architect Claude Correia, from the Atelier Correia Architectes & Associés in Saulieu, in the heart of the Morvan, will create an 800m² link between past and future with an extension of the 12th century Petit Pontigny cellar, an historic monument where monks once aged their wines.

In Mâcon, local architect Antoine Récio from RBC Architecture in partnership with ACL Associés, was selected to design an extension to the existing BIVB building. This innovative construction of 1,600m² takes its inspiration from the ammonite fossils found in the region’s clay-limestone soils, and the screw of a wine press rising up 17m to offer views over the Saône.



The Cité des Vins et des Climats de Bourgogne network is a cultural and tourism project in the three sites of Beaune, Chablis, and Mâcon. These exceptional sites are designed for those seeking to discover and understand the riches of Bourgogne. In particular, they will explore the *Climats*, those uniquely Burgundian plots of land that characterize the *terroir* winegrowing model created in the region, where the wines offer a unique reflection of the place where the grapes grow.

► Next steps between now and 2022

- **March to summer 2021:** Work begins with the first stones laid
- **Spring 2021:** Choice of partner enterprises for the construction and creation of different interior spaces, including three scenographic visitor trails
- **Summer 2021:** Creation of audiovisual content to showcase the Bourgogne region across the scenographic visitor trails
- **Fall 2021:** Marketing the sites and preparation of the launch plan
- **2021-2024:** Patronage campaign
- **Summer 2022:** Opening of the three Cités

Follow the progress of the Cité network at www.cite-vins-bourgogne.fr

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What's in a name? The Bourgogne family explains...

Bourgogne, 16 March 2021

In 2012, on the request of its elected representatives, the Bourgogne Wine Board (BIVB) decided to stop translating the word “Bourgogne”, whatever the country. The aim is to help consumers find their way by ensuring coherence between our wine labels and the name of the region where the wines were created.

Bourgogne wines enjoy a strong global reputation with half of all Bourgogne wines produced being sold at export to around 170 territories. However, the farther the consumer lives from France, the more they struggle to understand our appellation system. They can get their bearings thanks to the wine's origins, which is the name of this winegrowing region. It is therefore essential to use only one powerful name, a synonym for excellence and the respect for origins: Bourgogne.

Historically, Bourgogne is the only wine-producing region in France whose name is translated into different languages: “Burgundy” for English speakers, “Burgund” for Germans, “Borgogna” in Italian, to name but a few. This dates back to ancient times when the region was established as a crossroads for trade between the north and south and the east and west of Europe, as it still is today.

As such, Bourgogne wine producers and fans find themselves caught up in something of a paradox. The 200 million bottles of Bourgogne wine sold every year have the word “Bourgogne” on their label, either due to their appellation, which might be Bourgogne, Crémant de Bourgogne, Bourgogne Aligoté, and so on, or because they are a “Vin de Bourgogne” or a “Grand Vin de Bourgogne”. But consumers can find them amongst a range referred to Burgundy, Burgund, or Borgogna...

Confusing, to say the least.



© BIVB / Sopexa

“We felt it necessary to return to our original name, Bourgogne, in order to affirm our true identity, in a unified and collective way,” explains François Labet, President of the BIVB. “I’d say that our appellations are like our forenames, which makes Bourgogne our family name. A name that unites us all with our shared values embracing all the diversity of our wines. You don’t translate a family name!”

Gradually, things are evolving, and we are starting to see the word “Bourgogne” appear in French in texts across a range of media and on certain partner sites abroad. This position is fairly well understood, even if it takes time to change certain habits. “While Burgundy is by far the most widely recognized name for the Bourgogne region in English speaking markets, bearing in mind that all other French appellations go by their native name, wherever they are referenced, I can fully understand why Bourgogne no longer wants to be the exception and move away from using an Anglicization of its name,” explains Patrick Schmitt, Editor-in-Chief at The Drinks Business.

The 2019 vintage

The magic of years ending in a “9”

Bourgogne, November 2020

2019 was a year of great contrasts in terms of the weather (see our press release from November 2019). It brought plenty of stress, with some tense moments for many producers, yet the harvest went smoothly and the end results were fabulous. It was hot and dry, but the wines nonetheless reveal a vigor that is already delighting fans of Bourgogne wines. The magic of years ending in a “9” happens once again.

The only disappointment was the volume: 1.23 million hectoliters (excluding VCI) is less than the 10-year average of 1.44 million hectoliters (2010-2019).

White wines

■ Chablis and the Grand Auxerrois

2019 is already emerging as an exceptional vintage. The grapes were beautifully ripe whilst maintaining excellent vigor. The wines are perfectly balanced, their nose offers pleasant aromas of ripe citrus with subtle floral hints.

In the mouth, they are ample and generous, with remarkable flesh and texture and very pleasant tension on the finish.

■ Côte de Beaune

This is an extremely promising vintage. This was a particularly hot year and the wines are of astonishing quality. They have a very rich aromatic range with aromas of ripe fruit like apricot, peach, and quince, mingled with touches of orange and candied lemon and delicate vanilla and floral hints.

In the mouth, they are indulgent with exemplary balance, characterized by unusual concentration and body. Their length on the tongue and aromatic persistence is quite simply impressive.



■ Côte Chalonnaise

Here, too, the summer heat allowed the grapes to reach a high level of maturity. Indeed, balance and harmony are the buzz words for this vintage. The aromatic palette is admirable: Alongside deliciously fruity notes of peach, pear, and apricot, these wines offer subtle notes of lime and acacia blossom, honey, and sweet spice.

In the mouth, they are fleshy, rounded, and vigorous, with a delicious finish and wonderful length. Exquisitely indulgent, these wines can be enjoyed in their youth, whilst offering good keeping potential.

■ Mâconnais

Although the weather during this vintage – with spring frost, and a hot and dry summer – prevented even ripening across the board, it didn't affect the quality of the grapes, no doubt due to the small volumes harvested. The wines are characterized by wonderful aromatic richness and excellent balance.

The nose is marked by intense notes of ripe fruit like citrus, pineapple, apricot, pear, and flowers like honeysuckle and linden. In the mouth, they are fleshy and rounded with excellent length, underscored by a pleasantly citrusy finish.

**→ Discover the video of the 2019 vintage,
presented by Amaury Devillard on the online pressroom.**



*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 2020 vintage

A great classic, the result of a unique year

Bourgogne, 9 November 2020



© BIVB / Michel JOLY

According to many wine professionals in Bourgogne, the 2020 vintage is quite unique. To begin with, the conditions and context surrounding its production were relatively complicated for everyone. In addition, this year was a historically precocious one, from budburst to harvest. In the end, for many winegrowers, the results have been absolutely exceptional, and remarkably classic!

When the lockdown began in mid-March, the weather was beautiful in France. It lasted until mid-September. The vines took advantage of this to get a 3-week head start at budburst. They were able to maintain their advance until harvest, which began on August 12 in the Mâconnais.

Very early flowering raised hopes for an abundant harvest. High summer temperatures, coupled with the lack of rainfall, caused a significant water deficit, albeit unevenly from one area to another. These shortages created a few occurrences of very concentrated grapes and even slight scorching on bunches facing the sun. This vintage is, more than ever, a mirror of Bourgogne's diversity. Within different appellations, or sometimes even within the same appellation, the maturities were occasionally staggered, as was the case with the flowering and depending on whether or not rainfall was present. Winegrowers thus needed to keep a cool head, and exercise patience when choosing the harvest date.

Vinification was easy, thanks to the extremely healthy condition of the grapes. There was practically no disease or rot due to the absence of rain. Sorting tables were only used to pick out a few scorched grapes. Wine professionals have been enthusiastic by initial tastings: the particular conditions of this vintage have created unprecedented and unique balances. Of course, there is a subtle richness, but at the same time a pleasant tension, especially for the reds. Many are already anticipating 2020 as a vintage that will age exceptionally well, for both white and red wines. To be confirmed after the barrel ageing!

White wines

The white wines are fruity and express a beautiful aromatic complexity, with very good acidity. In spite of the summer heat, they are well balanced, with a classic freshness that meets the expectations of a typical bourguignon vintage.

Red wines

The red wines stand out with their incredible colors! They have beautiful sustained colors, a sign of abundant anthocyanins. The ideal conditions of sunshine and heat during ripening have led to concentrated wines, with lots of character, but without being heavy. Like the white wines, they have kept their freshness and offer luscious black fruit notes such as blackberry, blueberry, black cherry...

Crémant de Bourgogne

This will not be a “solar” vintage, although the base wines are offering some intense aromatic expression. These are rich, complex, and indulgent wines, with a surprisingly high level of acidity and low pH resulting in perfect balance.

The Pinot Noirs reveal delicious and very expressive aromas of red fruit such as cherry and raspberry, underscored by wonderful vigor.

The Chardonnays are also very aromatic, with good tension resulting from a marked acidity. One typically enjoys aromas of citrus and sometimes tropical fruit like pineapple.

The Gamays are marked by crisp and tart red berry flavors with aromas of strawberry and grapefruit.

The Aligoté varietal, which was more generous this year, is revealing fine volumes in the mouth, with wines that preserve all their vigor with lovely acidity.

**Discover the video of the 2020 vintage,
presented by Matthieu Mangelot on the online pressroom**



This press release only offers a general snapshot.

Because each wine and each winemaker is unique, wines need to be tasted individually before being characterized.

2020 Weather conditions



"Surprising", "Astonishing"! This is how this vintage, like the year 2020, is characterized by many professionals in Bourgogne. This vintage promises to be remarkable with some exceptional results in certain areas. This can be explained by the weather, which allowed, in spring, a flowering in ideal conditions, followed by warm temperatures during the summer. The combination of warm temperatures and dry weather, have nevertheless contributed in obtaining an attractive vintage with beautiful balance and freshness.

A very mild start to the year with a summer-like spring

The very mild winter, with temperatures above seasonal averages, led to early budburst throughout the vineyards. Plenty of rainfall enabled the vines to replenish their water reserves. The early budburst confirmed that the vines were ahead of schedule. **Estimated dates for the mid-budding stage (50% green tips) place 2020 among the earliest starting vintages.** It was even a week earlier than in 2019, regardless of the grape variety, thus placing it in the top three earliest vintages!

April prolonged the trend, averaging +3.6°C above normal! In mid-May, during the "Saints de Glace" period, there were some morning frosts, but fortunately without any serious consequences, thanks to the low humidity.

Beginning on May 14, the temperatures started to soar. The heat persisted well above normal until May 23. That encouraged **rapid progression of the flowering in certain areas and for certain grape varieties.** The first flowers appeared very early, taking the winegrowers by surprise, and at a time when they hadn't even finished raising their trellising wires.

Flowering was frankly magnificent. Flowers were well formed and plentiful, which implied a voluminous harvest. Nevertheless, the blossoming unfolded over a certain period of time. For the very first vines, fruit-set occurred around the 23rd of June. The latest vineyards saw this happen during the first week of July. It is at this moment that differences were apparent from one parcel to the next.

A summer marked by the lack of water

Summer weather barely slowed down the vine. Temperatures remained high and rainfall low, even very low, with disparities by location. In July, **rainfall was rare and inconsistent** throughout Bourgogne. Deficits ranged from 77 to 87% compared to a normal year, while temperatures were higher than normal (+1°C on average).

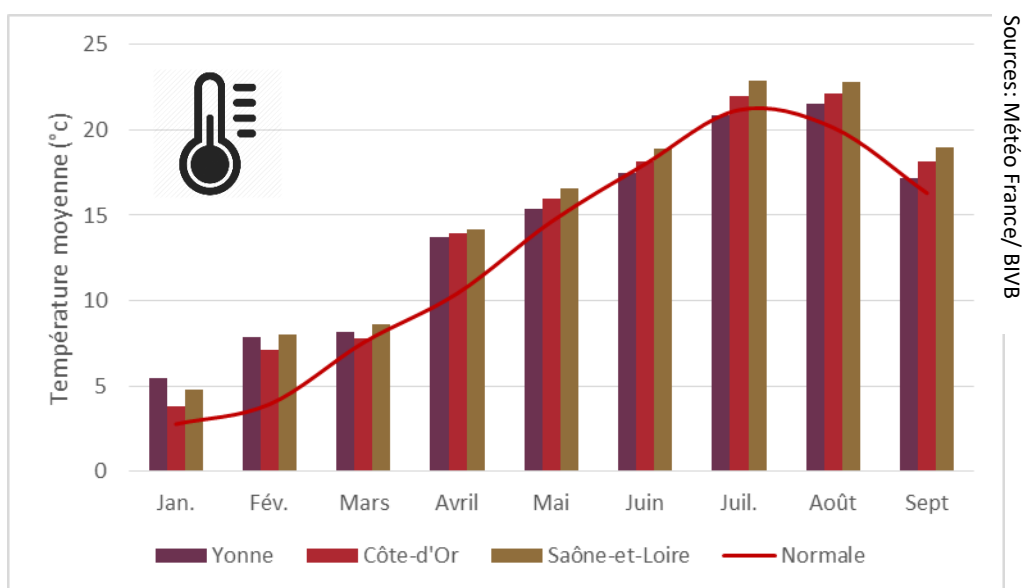
August provided some extremely localized tempestuous downpours. This mainly happened in the Chablis / Grand Auxerrois and Mâconnais areas.

These conditions led to slowing and sometimes even blocking veraison in some areas or plots. As a result, ripening was uneven, and the mosaic of Bourgogne's terroirs was more evident than ever!

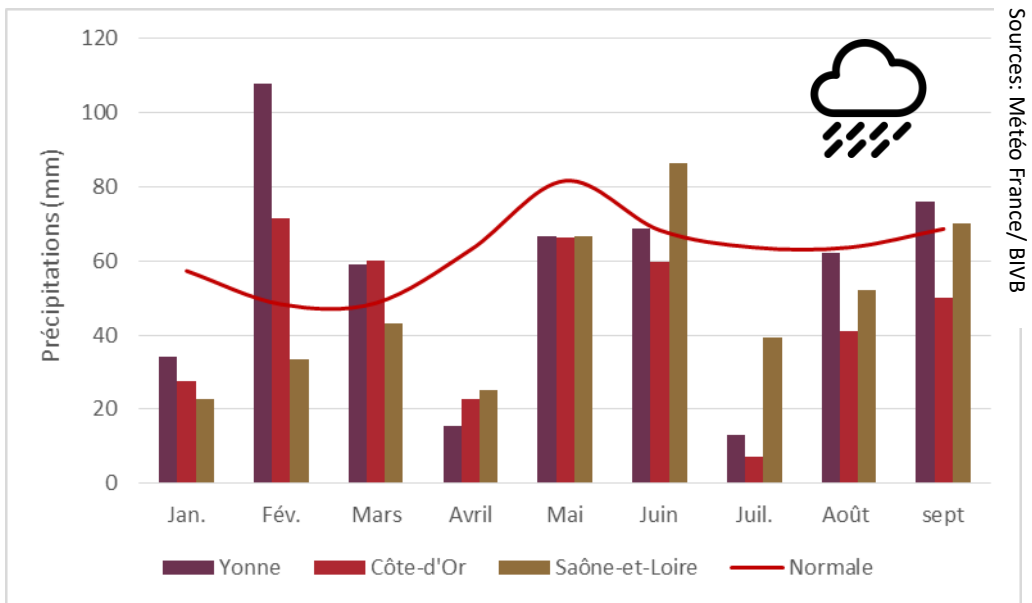
When harvest time came, all these differences had to be taken into account. While some plots were very early, mainly for Pinot Noir, others required more time to reach their optimal maturity. This was especially the case for Chardonnay.

Nevertheless, for many people, and for the first time in the history of Bourgogne, the harvest began and ended in August! In the Hautes Côtes, the last grapes were harvested before mid-September.

Average monthly temperatures (°C) - Bourgogne 2020
Comparaison à normale par département



Average monthly rainfall (mm) – Bourgogne 2020
Comparison to normal by department



Average monthly sunshine (hours) – Bourgogne 2020
Comparison to normal by department

