Press release

BOURGOGNES
Bureau Interprofessionnel des Vins de Bourgogne

Bourgogne wines bounce back in all markets

Bourgogne, 26 September 2018

With harvesting having just come to a close in the Bourgogne wine region, the 2018 vintage looks poised to allow some winemakers and* négociants *to consolidate their market share, which was already bolstered by the 2017 vintage[1], while others hope to make a return to distribution circuits that have been neglected in recent years due to a lack of wine.


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- ***For the 2017-2018 campaign, figures for wine leaving estates (up 11% over 11 months) and transaction volumes (up 17% over 12 months) suggest an upturn, boosted by the 2017 vintage.***
- ***Growth in exports was much greater than over the same period last year: Up 4% by volume for the first seven months of 2018, compared to a drop of 2% for the first seven months of 2017. This was mainly driven by North America and Asian markets.***
- ***In France, on the supermarket circuit, wines from Bourgogne were the only AOC to record any growth, both by volume (up 2% over six months on 2017) as well as in terms of revenue (up 4.7%).***

The 2017 vintage stimulating advance trade transactions


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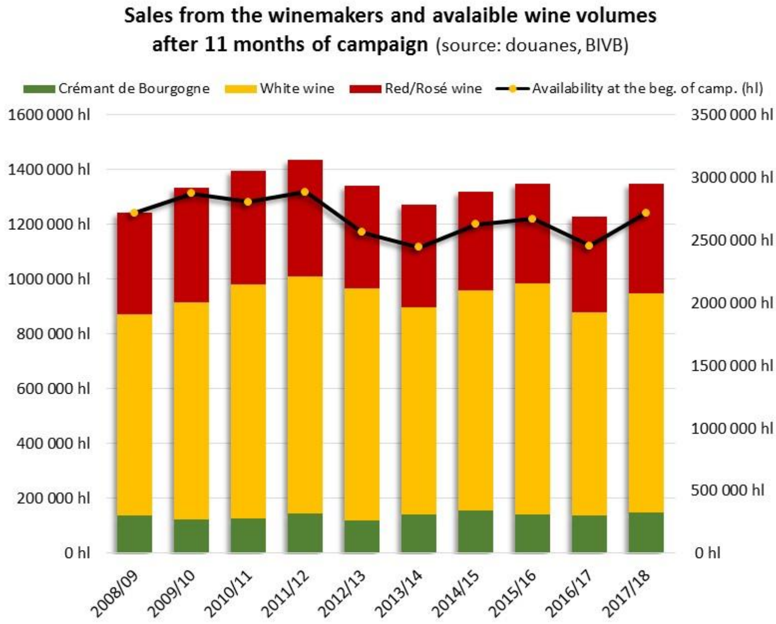
After the 2016 vintage, which was severely impacted by frost, the 2017 vintage allowed advance trade transactions to recover. It also helped Bourgogne wine sales to come back closer to the average over the last 10 campaigns. **Overall, wine leaving estates in 11 months of the 2017-2018 campaign, and average stock estimates on estates after 11 months of sales, were stable, both up 1%** on the 10-year average. **The volume of trade transactions for 2017-2018 remains, however, 2% below the 10-year average**.
Given that the 2018 vintage fully lived up to expectations, those in the Bourgogne sector can hope to restore the necessary balance in terms of supply and demand for long-term economic growth.

[1] The 2017 harvest, with a total of 1.5 million hectoliters, was 6% above the 10-year average.

Increase in wine leaving estates for 11 months of the campaign *(1 August 2017 - 30 June 2018)*

Wine leaving estates in the 11-month period rose by 10% compared to the same period in the previous campaign, to 1.35 million hectoliters. This was stable (up 1%) compared to the 10-year average.



Shipments of white wines were up 7.8% compared to the 11 months in the previous campaign (798,858 hectoliters, or 59% of total volumes). They were nonetheless down 1% compared to the 10-year average, with significant differences in areas impacted by weather incidents:

- ***Régionale*** **Bourgogne** appellations (23% of white volumes) **were up 18.8%** on the 11 months of 2016-2017, and up 5.5% on the 10-year average.
- ***Régionale*** **Mâconnais** appellations (23.8% of white volumes) **were up 7%** on 2016-2017, and up 9.2% on the 10-year average.

  For the production area of the Mâconnais (36.9% of white volumes), including *Village* appellations, volumes were up 7.5% year-on-year, and 10% on the 10-year average.
- Shipments of appellations from the **Côte Chalonnaise** (4.3% of white volumes) **were stable, up 0.6%** on 2016-2017, but rose 6.7% on the 10-year average.
- Volumes of **Chablis** appellations leaving estates (27% of white volumes) **dipped by 2%** on the same period in 2016-2017, and tumbled 18.3% compared to the 10-year average, the result of two consecutive years of frost in this region.

Overall, red wine shipments were up 14.3% (393,884 hectoliters, for 29% of volumes shipped), and up 3.2% on the 10-year average. Although the production of red wines is gradually falling in favor of white wines and Crémant de Bourgogne, it remains very dynamic in the short-to-medium-term:

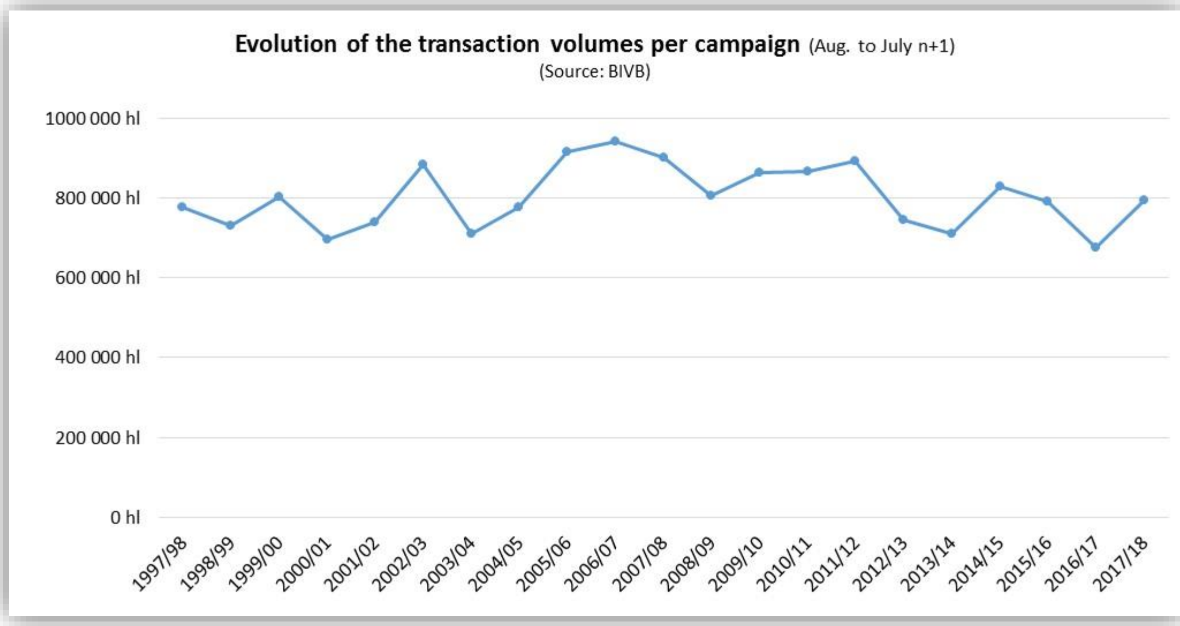
- ***Régionale*** **Bourgogne** appellations (47% of red volumes) **were up by 14%** on the same 11-month period in 2016-2017, and up 5.6% on the 10-year average.
- Appellations from the **Côte Chalonnaise** (9.3% of red volumes) **were up by 3.9%** on the 11 months of 2016-2017, and up 8.7% on the 10-year average.
- The appellations of the **Côte de Beaune** and **Côte de Nuits** (35.3% of red volumes) **were up by 19%** on 2016-2017, and were 2.3% ahead of the 10-year average.

Over the same period, volumes of **Crémant de Bourgogne leaving estates jumped 8.2%** (149,674hl, or 11% of total volumes of Bourgogne wine), and were up 10% on the 10-year average.

The 2017-2018 campaign showing more dynamic transactions

The Bourgogne wine sector saw a renewed dynamic in the transactions market thanks to the 2017 harvests. **Volumes were up by 17.6%** (792,466hl) compared to the 2016-2017 campaign. However, this remained 2% below the 10-year average.

- Transactions of white wine (56% of total volumes, or 440,605hl) **grew by 16.6%** compared to the 2016-2017 campaign, but remained well below the 10-year average (down 9.8%).
- By contrast, transactions of red wine (29% of total volumes, or 231,692hl), **soared by 30.9% compared to the 2016-2017 campaign,** and were up 7.4% on the 10-year average.
- Transactions of Crémant de Bourgogne (15% of volumes, or 117,396hl), **were stable, up 0.2%** compared to the 2016-2017 campaign, the volumes harvested in 2017 having fallen compared to 2016. **Transactions were, however, up 16% compared to the 10-year average**.



The evolutions in the transactions market by appellation reflect the heterogeneity of the volume of wine leaving estates.

For white wines:

- ***Régionale* Bourgogne** appellations (23% of white volumes) **were up 31.2%** compared to the 2016-2017 campaign, but fell 6.7% compared to the 10-year average.
- ***Régionale* Mâconnais** appellations (24% of white volumes) **were up 8.6%** compared to the 2016-2017 campaign, and remained stable compared to the 10-year average (up 0.3%). For the Mâconnais production area (35.7% of white volumes), including *Village AOC*s, volumes were up 10.5% year-on-year, but were slightly down on the 10-year average (down 6%).
- Transactions involving appellations from the **Côte Chalonnaise** (4.3% of white volumes) **fell by 9.7%** compared to the 2016-2017 campaign, but were stable compared to the 10-year average (up 0.6%).
- Transactions for the **Chablis** appellations (29% of white volumes) **grew by 10.8%** compared to the 2016-2017 campaign), but were significantly below the 10-year average, down 24.8%.

For red wines:

- ***Régionale* Bourgogne** appellations (53.6% of red volumes) **were up by 24%** on the 2016-2017 campaign, and up 5.6% on the 10-year average.
- Appellations from the **Côte Chalonnaise** (7% of red volumes) **were up by 3.9%** compared to the 2016-2017 campaign, but dipped 1.7% on the 10-year average.
- Appellations from the **Côte de Beaune** and **Côte de Nuits** (32.6% of red volumes) **soared by 57.2%** over the 2016-2017 campaign, and were up 17% on the 10-year average.

Volumes purchased by the *négoce* trade of the 2017 vintage accounted for 89% of transaction volumes in this campaign, and 705,072hl out of the 792,466hl that were sold. **The proportion of the 2017 vintage** of total transactions **explains the dynamism of the market**.

The stock on estates[2] over 11 months of the 2017-2018 campaign is estimated at 1.346 million hectoliters, an 11% increase on the same period of the 2016-2017 campaign. However, it changed little compared to the 10-year average (up 1%) and was below the average of the last 20 campaigns.

The arrival of the **2018 vintage** should allow the Bourgogne wine sector the possibility **to have a volume of available wine to match the demands of the market**.

Export: A good start on the main markets

The healthy 2017 vintage has contributed to the dynamism of Bourgogne wines on the export market. **Exports were up 4% by volume for the first seven months of 2018, compared to the same period in 2017. The Bourgogne region was thus among three leading French *AOC* regions that showed growth.**
In terms of revenue, it continued to set records, with total receipts of 532 million euros for the first seven months of 2018 (up 7.6% on 2017). This was generated **51% by white wines**, **46% by red wines**, and **3% by Crémant de Bourgogne sparkling wines**.

This strong performance does, however, mask a certain number of discrepancies. Some white wine areas suffered adverse weather incidents, which impacted the overall available stock. As such, the volume of white wine exports in the first seven months of 2018 was below the 10-year average (down 2%). Volumes may well return to normal thanks to the abundant 2018 harvests.

- Chablis wines, impacted by climate incidents in both 2017 and 2016, once again recorded a drop in export sales: Down 3.2% by volume in the first seven months of 2018 compared to the same period in 2017.
- Excluding Chablis, the total number of bottles of Bourgogne wine exported rose by 2.2 million (up 6.5% on the first seven months of 2017).

The main markets of North America, Asia, and certain European countries showed some very strong revenue figures. This underlined the upturn in export volumes for most Bourgogne wines.

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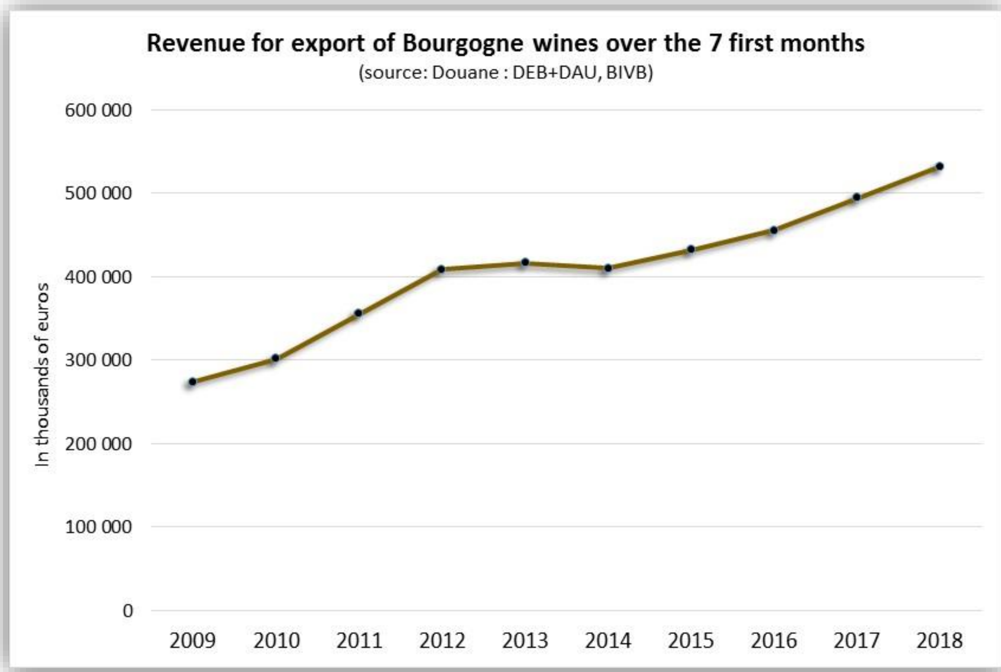
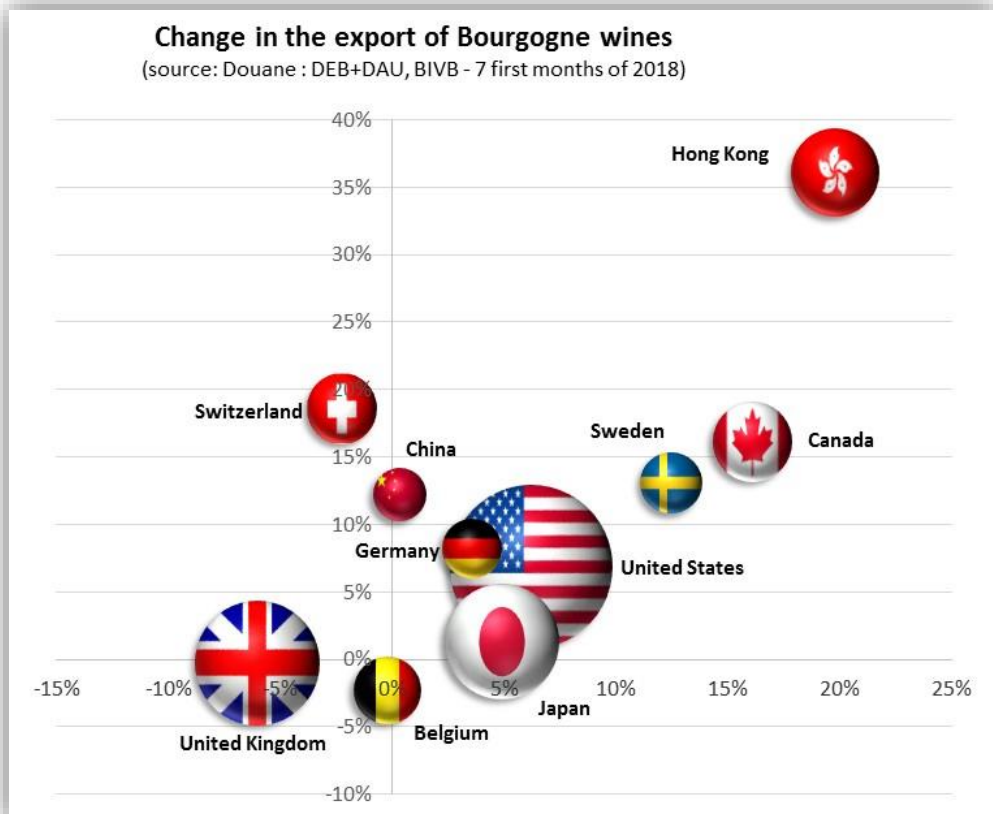
[2] Stock on estates is extrapolated based on figures for wine available at the start of the 2017-2018 campaign and wine leaving estates in the first 11 months of the 2017-2018 campaign.





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, undisputed leader

Exports of Bourgogne wines to North America showed strong growth, up 8.8% by volume over the first seven months in 2017. This was mainly driven by *Régionale* white appellations and the return of Chablis wines to the USA. Revenue was also up by 12 million euros, an 8.5% rise.

The United States, the leading export market for Bourgogne wines, owed some of its performance to the favorable euro/dollar exchange rate. In the first seven months of 2018, **the United States accounted for 24% of export revenue from Bourgogne wines** (17% in 2009). But those in the Bourgogne wine industry remain vigilant, because the protectionist policies of the Trump administration could lead to more onerous customs and food hygiene regulations.

Volumes exported to the USA were up by 6.2% on the first seven months of 2017 (22% of total exports by volume), to more than 10 million bottles in the period. In the space of a decade, Bourgogne wine sales to this market have risen by some 4.64 million bottles (compared to the first seven months of 2009).

- ***Régionale* Bourgogne appellations** were the chief beneficiaries, by volume, with an additional 419,000 bottles sold (up 11%), along with a 6.4 million euro hike in revenue (up 19%).
- ***Régionale* Mâcon *AOCs*** were up 9% by volume, an additional 145,700 bottles, while revenues rose by 472,000 euros, a 5.5% increase.
- After a short-term dip in 2017, **Chablis appellations returned to growth, both by volume** (up 22%, with an additional 265,160 bottles) **and in terms of revenue** (up 14%, a rise of 1.62 million euros).

Revenue from Bourgogne wines in Canada posted significant growth. During the first seven months of 2018, **revenues were up 16%, driven by red wines** (up 29.4%), despite the fact these only account for 31% of the volume exported to this country.

The greatest increase by volume was recorded by the *Régionale* appellations from the Mâconnais, which **soared by 47%** compared to the first seven months of 2017. This was accompanied by strong growth in revenue for Bourgogne white wines, up 37% year-on-year.
All taken together, ***Régionale* Bourgogne appellations outstripped the record set in 2016, with more than 2.2 million bottles** exported (up 16% on the first seven months of 2017), for revenue of 12.4 million euros (up 23.6%).

Chablis wines were the second most exported group of appellations by volume, **and have seen continual growth over the past decade** with sales reaching 822,000 bottles in the first seven months of 2018. However, revenue was down 2.5% for a total of 6 million euros in the first seven months of 2018.

The free-trade agreement (tariff and non-tariff barriers) between the European Union (EU) and Canada (CETA) was "temporarily" applied from 21 September 2017, awaiting all members of the EU to vote on the issue, which could take several years. This decision, which abolishes tariff and non-tariff barriers, is of crucial importance for the Bourgogne wine region, which ranks as the second export region among French *AOC* wines, and the leading one for French appellation white wines (first seven months of 2018).

Southeast Asia continued to perform well

In the first seven months of 2018, total revenue from Bourgogne wines in the three main Asian markets (Japan, China, and Hong Kong) was up for the fifth consecutive year, resulting in a 41.6% rise over the equivalent period in 2014.

Hong Kong confirmed its place as leader in terms of growth in revenue: Up 36% on 2017.

- **Red wines** benefited most from this growth, with a 34.5% increase by volume, accounting for 55% of all bottles of Bourgogne wine exported to that market.
- ***Régionale* Bourgogne red appellations** were up 26.6% by volume and 71.6% in terms of revenue (9 million euros over the first seven months of 2018).
- **Red *Grand Cru* appellations from the Côte de Beaune and Côte de Nuits** saw volumes jump by 85.4%, for total revenue of 10.9 million euros (up 20.2% on the first seven months of 2017).
- ***Village* and *Village Premier Cru* red wines from the Côte de Beaune and Côte de Nuits** regained market share thanks to healthy growth by volume (up 28% on the same period in 2017), for revenue of 7 million euros (up 22%).
- Taken together, **Bourgogne white appellations** were up 5.8% by volume, and surged 55.7% in terms of revenue.

After an outstanding year in 2017, growth in China stabilized by volume: Up 0.3% in the first seven months of 2018. Revenue continued to climb: Up 12.2% to 13.3 million euros.
Although **Bourgogne white wines** only accounted for 30% of volumes exported, they were the strongest performers in the first seven months of 2018, with revenue increasing by 28.3% to 3.7 million euros over the period, while volumes were up 20.3%, for 287,550 bottles. *Régionale* Bourgogne white appellations (up 8.7%) and the Chablis and Petit Chablis appellations (up 21%) both drove this growth in volume.

Although export volumes of **Bourgogne red wines** fell by 6.9%, revenue continued to grow, up 6.6%. This was mainly due to *Village* and *Village Premier Cru* appellations from the Côte de Beaune and Côte de Nuits (up 27% on the first seven months of 2017).

In Japan, the volume of Bourgogne wines exported in the first seven months of 2018 rose (up 4.9% to 4.46 million bottles).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This was **chiefly driven by white appellations**, for which revenue was up by 10.2% to 28.5 million euros for the period, while exports by volume were up 6% year-on-year to 2.5 million bottles. *Régionale* Bourgogne appellations (up 26.6%) and Chablis appellations (up 8.3%) were the leading vectors of growth. Revenue generated by these appellations was up 21.7%, for combined revenue of 20.5 million euros for the first seven months of 2018.

For red wines, although *Régionale* appellations showed healthy growth by volume (up 24.5% to 1.37 million bottles), one should note the downturn for more premium appellations (down 32.8%). This led to a fall in overall revenue for reds (down 5.9% on the same period in 2017), despite *Régionale AOC*s seeing sales jump 32% to 16.3 million euros. They accounted for 76% of red wine exports during the period.

The Japanese government approved free-exchange agreements with the European Union in July 2017, which are expected to come into force in 2019. This decision is of key importance for the Bourgogne wine region, since it is the second-biggest exporting region to Japan among French *AOC* wines, and the leading one for French white *AOCs* (2016 figures).

Europe: A multi-faceted market

United Kingdom: Overshadowed by Brexit

Brexit continues to overshadow the UK market, notably due to the weak value of sterling opposite the euro. **In this context of uncertainty, exports of Bourgogne wines managed to maintain stability in terms of revenue (down 0.3% on the first seven months of 2017).** The overall volume exported continued to fall, down 6%. This is largely due to a significant drop in sales of Chablis (down 22.6%), caused by the low production of the 2016 and 2017 vintages.


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Certain Bourgogne appellations did, however, far better. ***Régionale* appellations were up 12% by volume** (to almost 4 million bottles), although this did not make up for the drop in Chablis exports. Their revenue was also up by 15% to 18.2 million euros for the period.

Bourgogne red wines performed well, up 24.6% (1.45 million bottles), for revenue that was up 44% to 28.7 million euros.

Sweden: Records for volume and revenue

In Sweden, figures for the first seven months of 2018 set two new records: Bourgogne wines broke the barrier of 3 million bottles shipped (up 12.5% on the same period in 2017), for revenue of 17.8 million euros (up 13%).

- This excellent performance was driven by ***Régionale* Bourgogne appellations**, up 27% by volume to one million bottles, with revenue rising 25% to 5 million euros.
- **Crémant de Bourgogne** also played an important role in setting these records: Up 21.3% by volume and up 22.4% in terms of revenue.
- **Chablis wines** fared better in Sweden than in the United Kingdom, their revenue increasing by 5% (6.5 million) for stable volumes (down 0.6%).
- Although **red wines** only accounted for 14% of the volumes exported, they also contributed to the healthy performance: Up 12.9% by volume and up 7.2% in terms of revenue (3 million euros).

Germany: Recovery driven by *Régionale* Bourgogne *AOCs* and Crémant de Bourgogne

Germany returned to growth by volume (up 3.6% in the first seven months of 2018), after a dip in 2017 (down 5% for the full year).

This growth was partly driven by the upturn in ***Régionale* Bourgogne red appellations**, which surged 167.8% by volume and 106.7% in terms of revenue (1.5 million euros).

Sales of **Crémant de Bourgogne** continued to grow on this market, up 6.4% by volumes for revenue of 1.8 million euros (up 11.5% on the first seven months of 2017).

Belgium: Crémant de Bourgogne the star performer on this market

After excellent results in 2017, the Belgian market stagnated for the first seven months of 2018. Export volumes were stable (down 0.2%), while revenue dipped slightly (down 2.3%).

Crémant de Bourgogne was the only category to show significant growth, up 61.6% by volume for revenue which for the first time exceeded one million euros for the period (1.35 million euros).

This somewhat-muted performance does not tell the whole story. As with Switzerland and Germany, the volume of Bourgogne wines purchased directly from the region by visiting Belgians (the second-biggest tourist population in the wine region) are not counted in the customs statistics.

Switzerland: Revenue increase thanks to *Grand Crus*

While overall volumes exported were down 2.2% on the first seven months of 2017, revenue showed an 18.6% increase over the period.

Bourgogne red wines recorded a rise in both revenue (up 19.8% to 13.7 million euros) and volume (up 4.3%). *Grand Cru* red wines performed particularly well, with an 18% rise by volume and a 26.5% rise in revenue.

Mâcon white wines surged 41% by volume and 238% in terms of revenue, but this was not enough to compensate for an overall fall in white wine sales (down 6.5% by volume).

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Export figures for Bourgogne wines

(*Total first seven months of 2018 over 2017 - Source: BIVB/Customs*)

	In thousands of 75cl bottles (equivalent)			In thousands of euros		
Country	Volume January 2018 - July 2018	Volume January 2017 - July 2017	Variation volume	Revenue January 2018 - July 2018	Revenue January 2017 - July 2017	Variation revenue
Total Bourgogne	**46 980,14**	**45 087,88**	**4,2%**	**532 079,87**	**494 307,18**	**7,6%**
UNITED STATES	10 258,46	9 659,01	6,2%	125 520,58	117 484,20	6,8%
UNITED KINGDOM	7 402,42	7 876,21	-6,0%	73 239,77	73 429,70	-0,3%
JAPAN	4 464,36	4 256,23	4,9%	61 729,77	60 941,23	1,3%
CANADA	4 046,91	3 485,36	16,1%	29 751,56	25 619,35	16,1%
BELGIUM	3 644,10	3 652,27	-0,2%	20 875,70	21 368,92	-2,3%
SWEDEN	3 043,58	2 705,81	12,5%	17 812,81	15 752,50	13,1%
GERMANY	1 943,37	1 876,57	3,6%	16 244,84	15 009,27	8,2%
NETHERLANDS	1 623,24	1 598,54	1,5%	11 764,48	11 366,19	3,5%
DENMARK	1 200,48	1 150,67	4,3%	12 735,60	10 789,59	18,0%
CHINA	976,63	973,27	0,3%	13 300,13	11 851,37	12,2%
AUSTRALIA	899,63	776,93	15,8%	10 712,67	10 314,81	3,9%
SWITZERLAND	893,50	913,81	-2,2%	22 867,89	19 284,59	18,6%
HONG KONG	737,94	616,01	19,8%	36 231,67	26 632,11	36,0%
NORWAY	668,09	714,94	-6,6%	5 702,96	5 337,72	6,8%
SOUTH KOREA	340,82	256,98	32,6%	5 331,51	4 347,14	22,6%
IRELAND	337,23	395,45	-14,7%	2 132,33	2 409,20	-11,5%
ITALY	334,25	296,12	12,9%	5 384,94	4 252,85	26,6%
TAIWAN	316,44	270,69	16,9%	10 701,92	10 396,07	2,9%
SINGAPORE	271,73	259,86	4,6%	6 407,96	6 810,92	-5,9%
ISRAEL	263,15	212,81	23,7%	2 572,80	2 106,89	22,1%
UNITED ARAB EMIRATES	253,02	291,66	-13,2%	3 888,23	3 805,65	2,2%
LITHUANIA	222,76	97,83	127,7%	1 932,01	944,71	104,5%
SPAIN	219,99	254,91	-13,7%	3 348,84	3 290,38	1,8%
BRAZIL	205,97	221,26	-6,9%	1 928,82	2 005,40	-3,8%
FINLAND	166,02	130,36	27,4%	1 122,47	976,40	15,0%
THAILAND	147,98	113,35	30,5%	2 198,30	1 725,90	27,4%
RUSSIA	131,73	112,34	17,3%	2 245,71	1 910,69	17,5%
MEXICO	123,49	137,68	-10,3%	1 175,82	1 177,19	-0,1%
LATVIA	110,35	107,77	2,4%	1 066,10	1 122,37	-5,0%
LUXEMBOURG	105,40	118,76	-11,2%	1 724,20	1 931,74	-10,7%
POLAND	100,12	161,94	-38,2%	841,88	1 004,25	-16,2%
AUSTRIA	92,96	99,52	-6,6%	1 885,55	1 768,24	6,6%

France: Bourgogne wines strong on traditional circuits, growing share in supermarket sector

In the first six months of 2018, Bourgogne wine sales grew faster than any other French *AOC* region in the supermarket sector, both in terms of volume and revenue (for regions selling more than 10 million bottles in the half-year). The healthy 2017 harvests contributed to this dynamic. In France, Bourgogne wines are still mainly sold on the traditional circuits of specialist wine stores and restaurants.

Supermarkets: Bourgogne the only French region in growth by volume and revenue

In the first half of 2018, **sales of still Bourgogne wines in French supermarkets were up in terms of volume** (up 2%, an additional 215,000 bottles on the same period in 2017), and **in terms of revenue** (up 4.7%). More than 11.32 million bottles were sold (excluding drive-thru, hard discount, and convenience stores), for record revenue of 89.54 million euros.


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The Bourgogne region was the only one to show growth by volume, and maintained its strong price-point. The 2017 vintage allowed Bourgogne wines to maintain growth in this circuit, which was not the case for most other French *AOC*s. Total sales of *AOC* wines in supermarkets were down 5.6% by volume and down 1.4% in terms of revenue in the first half of 2018.

Bourgogne wines sales continue to grow in specialist stores and restaurants

Restaurants

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.

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 in September 2017, having stagnated at around 5.0 for several years). Besides an increase in footfall, an 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 restaurateur in two 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*).


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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 major 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 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*.

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

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

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