



Canada

*New revenue record
for Bourgogne wines' fourth biggest export market*



Key 2018 figures for Bourgogne wines in Canada

4th biggest market by volume

5th biggest market in terms of revenue

Exports: 7.15 million bottles (up 9.5% on 2017) for revenue of 53.67 million euros (up 8% on 2017)

by volume

- ▶ Still white wines: 60%
- ▶ Still red wines: 33%
- ▶ Crémant de Bourgogne: 7%

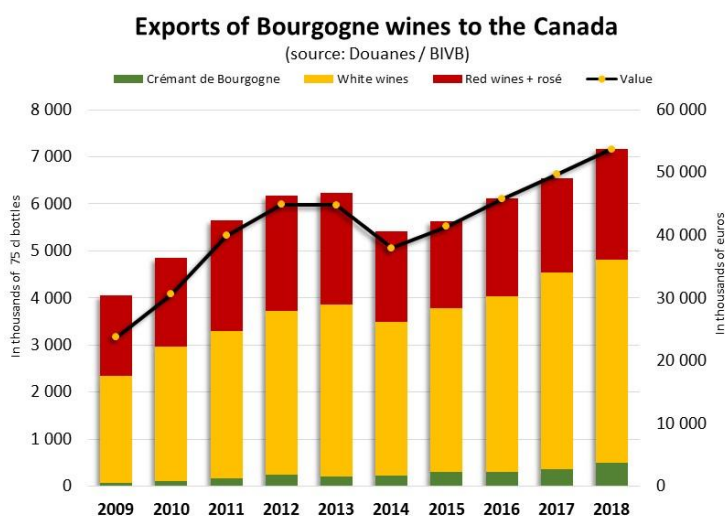
In the 12 months to the end of March 2018, at least 70% of Bourgogne wines sold in Canada were sold in Quebec (monopoly figures).

In terms of revenue, in 2018 Canada remained the fifth biggest export market for Bourgogne wines, behind the USA, Great Britain, Japan and Hong Kong, but ahead of Switzerland, with 6% of total revenue.

This market accounted for 9% of the volume of Bourgogne wines exported, making it the fourth biggest market by volume, just behind Japan.

Exports of Bourgogne wines to Canada grew, in line with the overall rise in wine consumption in the country. In the decade from 2009-2018, this has risen 76% by volume and 126% in terms of spending.

Bourgogne set a new record by volume



Canada is a key market for Bourgogne wines. Exports have grown there for four years in a row and set a new all-time record by volume for the second year running. The weakness of the euro to the Canadian dollar contributed to this strong growth.

Exports of Bourgogne wines showed dual growth in 2018:

- ▶ Up 9.7% by volume
- ▶ Up 8% in terms of revenue

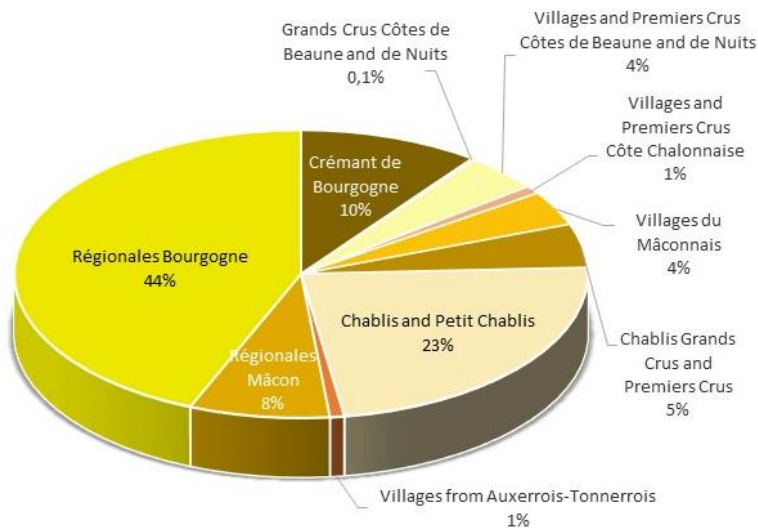
White wines and Crémant de Bourgogne were up 6% by volume and 4.1% in terms of revenue. After trading water in 2017, red

wines took off again last year, up 17.6% by volume and 14.4% in revenue.

In the first two months of 2019, **Bourgogne wines confirmed this healthy performance, up 28% by volume and 24.2% in terms of revenue** on first two months of 2018.

Régionale appellations dominate the market

Exports of white wines and Crémant de Bourgogne to Canada (2018)



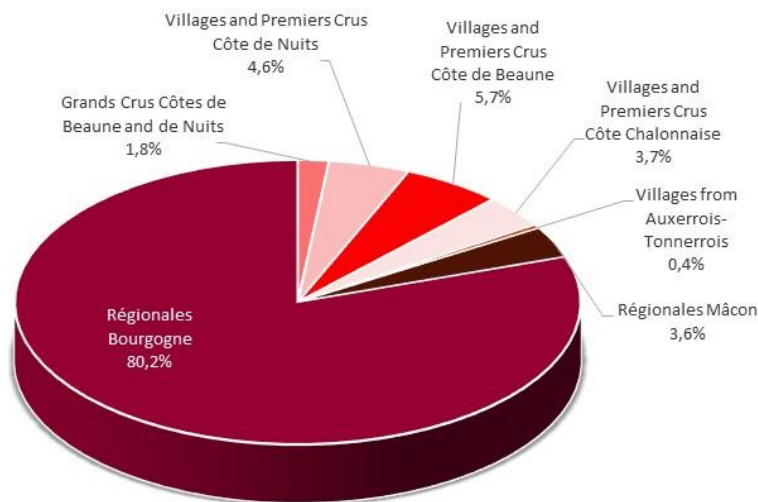
Bourgogne white wines accounted for the lion's share of exports, with 60% of total volumes (up 3.4% on 2017).

Among whites, **Bourgogne Régionale AOCs and Bourgogne Régionale AOCs with a geographical denomination accounted for 49% of volumes** of Bourgogne wines (37% in terms of revenue), closely followed by the **Chablis appellations** (31% of all volumes and 35% of revenue) and **Mâcon Régionale, Mâcon Village and Mâcon with geographical wines** (9% by volume and 7% in terms of revenue).

Sales of *Village* and *Village Premier Cru* wines from the Côte de Beaune and Côte de Nuits increased 82.8% by volume and 32% in terms of

revenue. Due to the lack of available wine, the Chablis and Petit Chablis appellations slipped back 6.2% by volume and 16.8% in terms of revenue.

Exports of red wines to Canada (2018)



Exports of red wines again showed good performance (up 17.6% by volume and 14.4% in terms of revenue), **accounting for 40% of Bourgogne revenues.**

Régionale appellations accounted for the large majority of red wine sales, with 80% of Bourgogne red wine volumes (up 26.2% on 2017) and 51% in terms of revenue (up 29%).

Village and *Village Premier Cru* wines of the Côte de Nuits (5% of the volumes of Bourgogne red wines) were up 4.6% by volume and 18.5% in terms of revenue.

At the start of this year, *Régionale Mâcon* white appellations (Mâcon, Mâcon Village, and Mâcon with a geographical denomination) performed well, up 14.8% by volume on the first two months of 2018 and up 19% in terms of revenue. They accounted for 9% of total volumes of Bourgogne white wines exported.

For red wines, *Régionale Bourgogne* appellations and Bourgogne with a geographical denomination showed the strongest growth, up 28.6% by volume on first two months of 2018 and up 32.4% in terms of revenue. On their own they accounted for 85% of Bourgogne red wine exports.

Crémant de Bourgogne continued to grow on this market, up an impressive 33% by volume and 60% in terms of revenue compared to the first two months of 2018.

Quebec remains the province where Bourgogne wines sell best

In Canada, overall wine consumption is now more than 500 million liters (the equivalent of just over 666 million 75cl bottles) and revenue from wine topped C\$7.2 billion in 2017. This increase applied across all provinces, but levels of wine consumption are very variable. The provinces of Quebec and Ontario share equally two-thirds of all wine sales by volume, followed by British Columbia (15% of sales) and Alberta (9%), while the remaining nine other provinces account for the remaining 8%.

Quebec remains the leading destination for Bourgogne wines exports to Canada, accounting for at least **70% of Bourgogne wine sales in the country**. For the last full year for which figures are available from the SAQ monopoly (12 months to end March 2018), 4.47 million bottles of Bourgogne wine were sold.

The region returned to growth both by volume (up 13%) and in terms of revenue (up 8%). Crémant de Bourgogne was up a strong 18.3% by volume and 14.6% in terms of revenue.

The SAQ sells a majority white Bourgogne wines (two-thirds of the total volume), while red wines accounted for 27% of sales and Crémant de Bourgogne 6%.

Bourgogne white wines followed the trend with a healthy 17% by volume and 13% in terms of revenue. Red wines were up 6.7% by volume, but down 6% by revenue.

After two years of growth, sales of Bourgogne wines in Ontario dipped. They registered a 10.7% drop by volume (nearly 100,000 bottles less) and 3.1% by revenue.

Most Bourgogne appellations were represented in the province in the 12 months to end-March 2018. But sales remained very concentrated:

- ▶ The number of references sold by the monopoly increased, going from 279 to 335 references.
- ▶ 17 references sold more than 10,000 bottles (compared to 21 in the 12 months to March 2017, 18 in the same period in 2015, and 8 in 2009).
- ▶ The 15 leading references sold accounted for three-quarters of the volume of Bourgogne wines sold, and 61% of the revenue (6 Bourgogne reds, 3 Bourgogne whites, 2 Mâcon blanc, 4 Chablis, 1 Petit Chablis, and 1 Pouilly-Fuissé: In total 9 white wines, 6 reds).
- ▶ Régionale appellations dominated sales of still Bourgogne wines, accounting for almost two-thirds of the volume sold.

*Economic report compiled by the Markets and Development department of the BIVB – April 2019
(Sources: Customs – BIVB – SAQ – LCBO [excluding bars/restaurants])*

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