



## The USA confirms its position as leader in terms of exports of Bourgogne wines



### Key figures in 2018 for Bourgogne wines in the USA

Leading market in terms of revenue and by volume

**Exports: 17.4 million bottles (up 3.8% on 2017); 211.8 million euros (up 2% on 2017)**

By volume

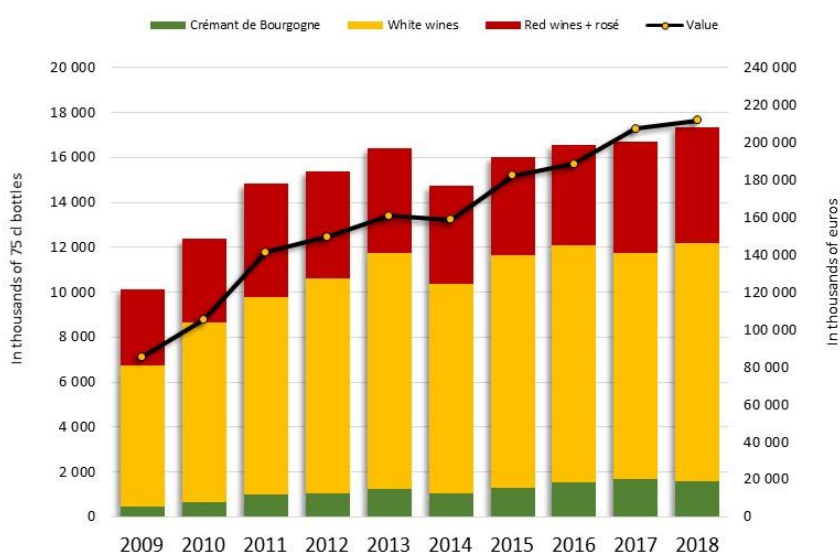
- ▶ Still white wine: 61%
- ▶ Still red and rosé wines: 30%
- ▶ Crémant de Bourgogne: 9%

In 2018, Bourgogne wines accounted for 12% of the volume of French AOC wines exported to the United States, for 14% of revenue.

### Exports of Bourgogne wines continue to grow

#### Exports of Bourgogne wines to the USA

Source: Customs / BIVB



Exports of Bourgogne wines continued to grow on the US market, for both whites and reds. Crémant de Bourgogne exports slightly slowed after several years of growth.

In total, exports of Bourgogne wines to the USA enjoyed new growth in 2018 compared to 2017:

- ▶ Up 3.8% in terms of volume
- ▶ Up 2% in terms of revenue

In 2018, the US was the leading importer of Bourgogne in terms of revenue, accounting for 23% of all exports of Bourgogne wines. It was also in first place in terms of volume, with 21% of all exports.

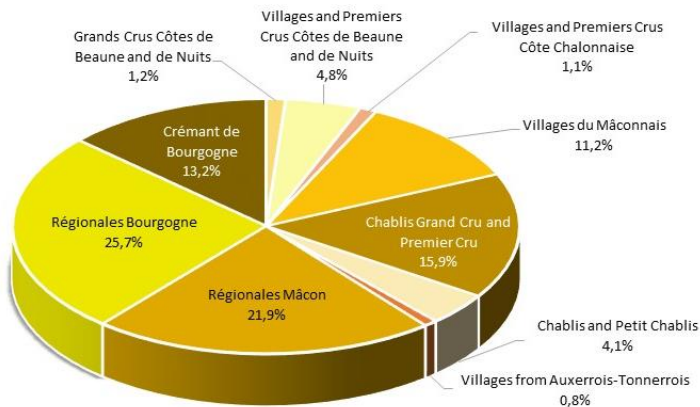
These strong results were driven by a favorable euro-dollar exchange rate. However, Bourgogne producers are remaining cautious with regard to the potential consequences of certain decisions taken by the Trump administration.

Over the first two months of 2019, exports were doing well, up 11% in terms of volume for all wines, and up 12.4% in terms of revenue over the first two months of 2018.

## Sales of Bourgogne wines to the US are naturally\* driven by Régionale AOCs

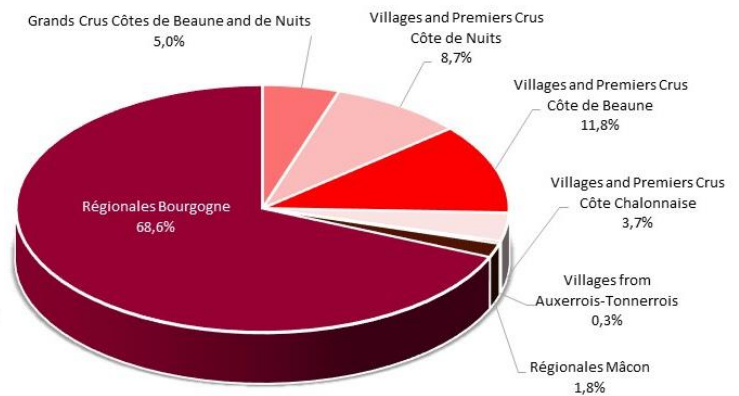
Exports of Bourgogne wines 2018

White wine and Crémant (%)



Exports of Bourgogne wines 2018

Red wine (%)



White Bourgogne wines dominate in terms of exports to the US, accounting for 61% of volumes exported and 50% of sales (up 2.7% over 2017).

- ▶ **Bourgogne and Bourgogne with a geographical denomination *Régionale AOCs*** account for 30% of volumes (29% in terms of revenue)
- ▶ **Mâcon and Mâcon with a geographical denomination *Régionale AOCs*** follow close behind with 25% of volumes (13% in terms of revenue)
- ▶ **Chablis AOCs** come in third, with 23% of volumes (21% in terms of revenue)

The image of Chablis wines has long suffered from the use of the Chablis name for local entry-level products, and the market share of Chablis wines within the offer of white Bourgogne wines remains less than that seen on other markets. Chablis AOCs nonetheless accounted for 23% of the offer of white Bourgogne wines, and 14% of sales of wines of all colors in 2018.

White **Village AOCs from the Grand Auxerrois** account for little in terms of export volumes of Bourgogne wines to the US, but growth is nonetheless up 59% in terms of volume and 60% in terms of revenue over 2017.

**Grand Cru whites from the Côte de Beaune and Côte de Nuits** have also grown in terms of volume (up 38%), but revenue dipped (down 6.9%).

Imports of red wines were up 4% in terms of volume over 2017 and accounted for 45% of sales of white Bourgogne wines to the US (up 2% over 2017).

- ▶ ***Régionale AOCs* accounted for the majority of purchases**, with 69% of red Bourgogne wine volumes (up 9.2% over 2017) and 39% in terms of revenue (up 16% over 2017).
- ▶ **Red Grand Crus from the Côte de Nuits and Côte de Beaune** have also grown in terms of volume (up 6.8% over 2017), with revenue stable at €27 million (down 0.4% over 2017).

\**Régionale AOCs* accounted for 53% of production of Bourgogne wines, comprising 46% Village and Village Premier Cru AOCs and 1% Grand Crus (average over five years from 2013 to 2017).

## Bourgogne wines appeal mainly to traditional markets, but are also seducing new audiences

In 2018, **64% of restaurants surveyed on US territory**, totaling 552 out of 860, **offered at least one Bourgogne wine** on their wine list. **As such, Bourgogne is in fourth position in terms of presence in restaurants within the global offer of still wines**, behind wines from California, Italy, and Argentina.

Wines from the Côte de Beaune (*Village, Village Premier Cru* and *Grand Cru AOCs*) and those from Chablis were more popular, with a presence in 74% of establishments offering Bourgogne wines. Wines from the Côte de Nuits (*Village, Village Premier Cru* and *Grand Cru AOCs*) were available in 62% of establishments, and *Régionale Bourgogne AOCs* in 60%.

In terms of the total offer of still and sparkling French wines, **the Bourgogne region accounted for the biggest number of references per establishment (46 references on average)** and, as a consequence, most of the total offer (38%). Across the entire French offer of still wines, those wines from the Côte de Beaune and Côte de Nuits accounted for the largest share of the offer with 25% (Source: Survey into 860 establishments in five states in 2018).

American consumers say they prefer to buy their wine in specialist wine stores rather than supermarkets, especially as the sale of wine in supermarkets is not authorized in all states. Only 6% of consumers questioned said they almost always buy their wine on the internet (Source: 2015 survey into where people buy wine).

Bourgogne wines are *terroir* wines offering a vast range of different expressions and as such, are naturally appealing to millennials. Indeed, millennials are more easily tempted than older consumers by “natural” products. In terms of imported wines, they enjoy original and artisanal products rather than standardized products found in supermarkets (2015 survey).

*Economic report compiled by the Markets and Development department of the BIVB – April 2019*  
(Sources: Customs DEB – BIVB – MIBD Market)

**Press contact:** Cécile Mathiaud – Press officer, BIVB  
Tel. +33 (0)3 80 25 95 76 - Cell + 33 (0)6 08 56 85 56 - [cecile.mathiaud@bivb.com](mailto:cecile.mathiaud@bivb.com)

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