

In 2019, the United States remained the leading export market for Bourgogne wines



Key figures in 2019 for Bourgogne wines in the United States

N° 1 export market for Bourgogne wines in terms of both revenue and volume

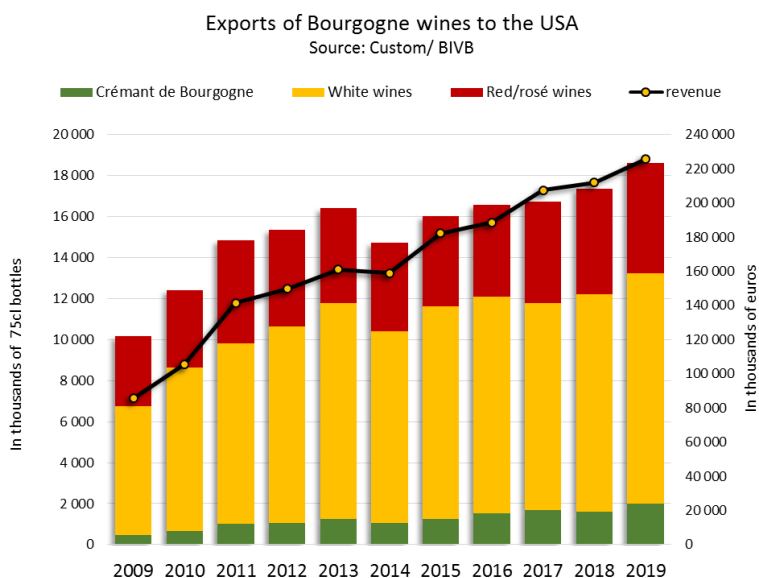
Exports: 18.6 million bottles (up 7.2% on 2018) for 225.6 million euros (up 6.5%)

by volume

- ▶ Still white wines: 60.6%
- ▶ Still red wines: 28.8%
- ▶ Crémant de Bourgogne: 10.6%

In 2019, Bourgogne wines accounted for 11.9% of the total volume of French AOC wines exported to the United States, and 13.8% of total revenue.

Continuous growth since 2015



Bourgogne wine sales continued to grow on the American market in 2019, for both white and red. Crémant de Bourgogne returned to growth after a stagnating for a year.

Overall, exports of Bourgogne wines to the United States recorded year-on-year growth in 2019 of:

- ▶ +7.2% by volume
- ▶ +6.5% in terms of revenue

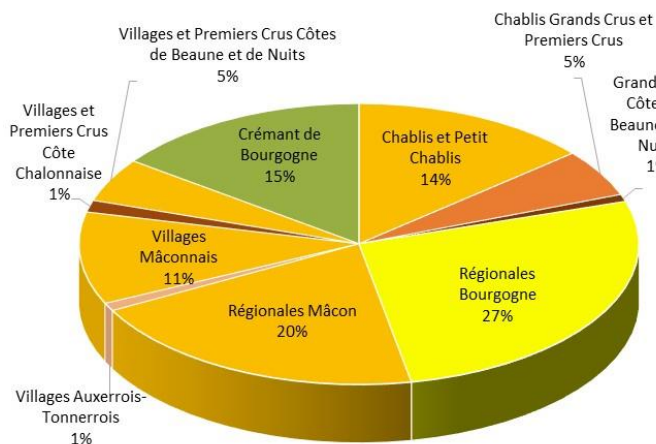
In 2019, the USA was the leading export market for Bourgogne wines by revenue, **accounting for 22% of total Bourgogne wine exports**. It was also in top spot **by volume, with 21% of total exports**.

This strong performance was notably driven by a favorable euro/dollar exchange rate. However, since mid-October 2019, Bourgogne wines (excluding Crémant de Bourgogne) have been subject to a decision by the US President to impose a 25% *ad valorem* tax on still wines as part of the trade dispute concerning Boeing and Airbus. This has been compounded by the consequences of the COVID-19 pandemic (closure of restaurants, wine bars, lockdown, suspension of shipping by plane, etc.). It is still too early to know the impact of these two factors on the Bourgogne wine market in the USA, but initial figures providing an indication should be available by May.

Sales of Bourgogne wines to the USA driven by *Régionale* wines¹

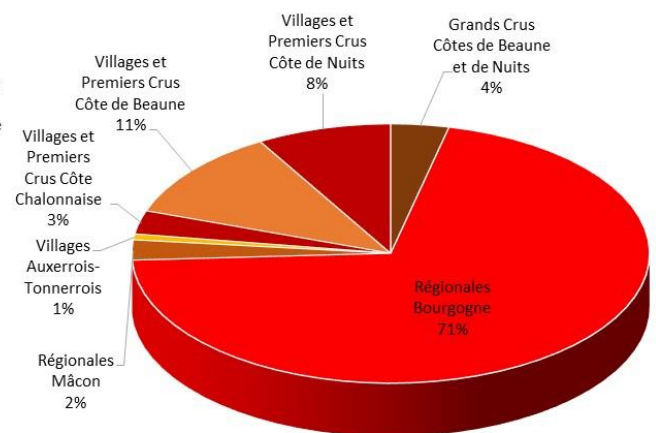
Exports of Bourgogne wines 2019 (volumes)

White wines and Crémant de Bourgogne (%)



Exports of Bourgogne wines 2019 (volumes)

Red and rosé wines (%)



Bourgogne white wines dominate the US market, accounting for 61% of export volumes for 52% of the revenue (up 10.5% on 2018), without Crémant de Bourgogne.

- ▶ **Bourgogne and Bourgogne plus geographical denomination AOCs** accounted for 32% of volumes (29% of revenue)
- ▶ **Mâcon, Mâcon-Villages, and Mâcon plus geographical denomination AOCs** came next, with 24% of the volume (11% of revenue)
- ▶ The **Chablis AOCs** were in third place, with 23% of the volume (21% of revenue)
The image of Chablis wine has long suffered from the use of its name by mediocre American-produced white wine, which means the share of Chablis among Bourgogne white wine exports is lower than that seen in other markets. **The Chablis AOCs still accounted for 23% of the offer of Bourgogne white wines**, and 14% of all Bourgogne wine sales in 2019.
- ▶ **Village white wines from the Grand Auxerrois (Vézelay and Saint-Bris)** do not account for significant volumes of Bourgogne exports to the United States, but nonetheless saw growth of 17.3% by volume and 37% in terms of revenue compared to 2018.

Grand Cru white wines from the Côte de Beaune and Côte de Nuits dropped by volume (down 27.5%), but were up in terms of revenue (up 20.4%).

Red wine exports were up 3.8% by volume and accounted for 43% of the revenue from Bourgogne wines in the United States (up 0.5% on 2018).

- ▶ **Bourgogne and Bourgogne plus geographical denomination appellations** accounted for the majority of sales, with 71% of the volume of Bourgogne red wines (up 6.8%) and 41% of the revenue (up 6.6%).
- ▶ **Mâcon and Mâcon plus geographical denomination appellations** grew by volume (up 42.3%), with revenue up 41.4% on 2018.

¹ Régionale AOCs accounted for 53% of the production of Bourgogne wines, for 46% of Village and Village Premier Cru AOCs, and 1% of Grand Cru AOCs (average for five years from 2013-2017).

Younger consumers adopt different buying habits

Bourgogne wines well represented in e-commerce

American wines naturally dominated the offer of still wines available by the bottle via online stores (49% of references). However, French wines accounted for almost one in five references (19%), ahead of Italian wines (13%).

In terms of red, Bourgogne wines were present on two-thirds of sites and accounted for 5% of all references (an average of 34 references per site), comprising a very high-end offer, mainly *Village* and *Grand Cru* appellations for the Côte de Beaune and Côte de Nuits.

The most widely-available appellations found on 25-35% of sites included Pommard, Volnay, Nuits-Saint-Georges, Gevrey-Chambertin, and Vosne-Romanée. Bourgogne Pinot Noir was also available on one-third of sites.

For white wines, Bourgogne was represented on three in four sites, accounting for 8% of the offer (almost half the French offer), **across a more diversified range**. Most groups of AOCs from the region were referenced on half of the sites surveyed, with Chablis and Pouilly-Fuissé the most widely-available. The Meursault and Mâcon-Villages appellations could also often be found.

In the sparkling wine segment, Crémant de Bourgogne (1% of the offer) was present on a quarter of sites, confirming this market as a key export destination for this appellation.

Survey of 2019 offer in the United States on 50 websites

Economic report by the Markets and Development department of the BIVB - April 2020

(Sources: Customs - DEB+DAU - MIBD Market - BIVB)

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