Press Release
#BourgogneWine

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.


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- 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.


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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:

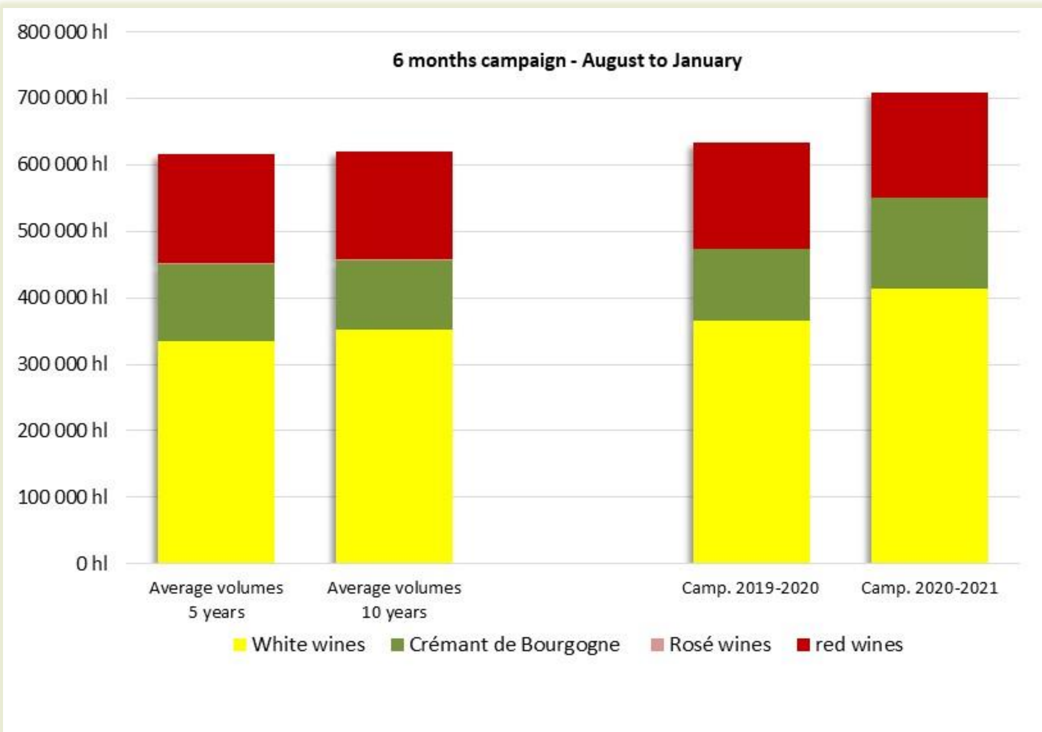
- ✓ **414,491hl of white wines**: Up 23.5% on the five-year average, for 58.4% of volumes.
- ✓ **157,551hl of red wines**: Down 3.8% on the five-year average, for 22.2% of volumes.
- ✓ **731hl of rosé wines**: Down 41.4% on the five-year average, for 0.2% of volumes.
- ✓ **136,389hl of Crémant de Bourgogne**: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

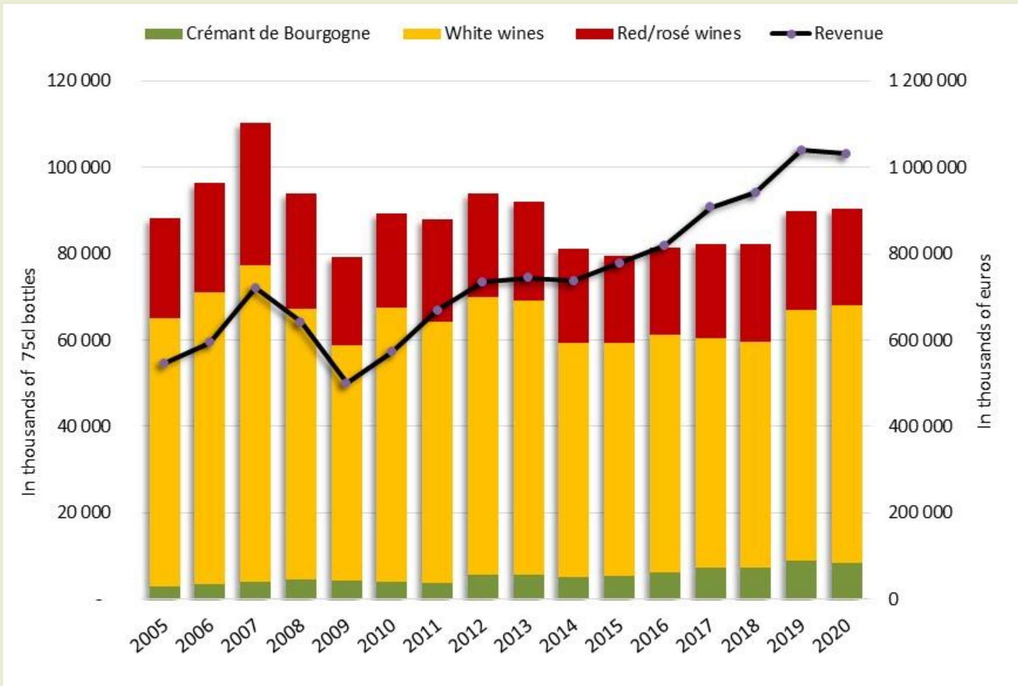


Exports: 2020 revenue still above one billion euros

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

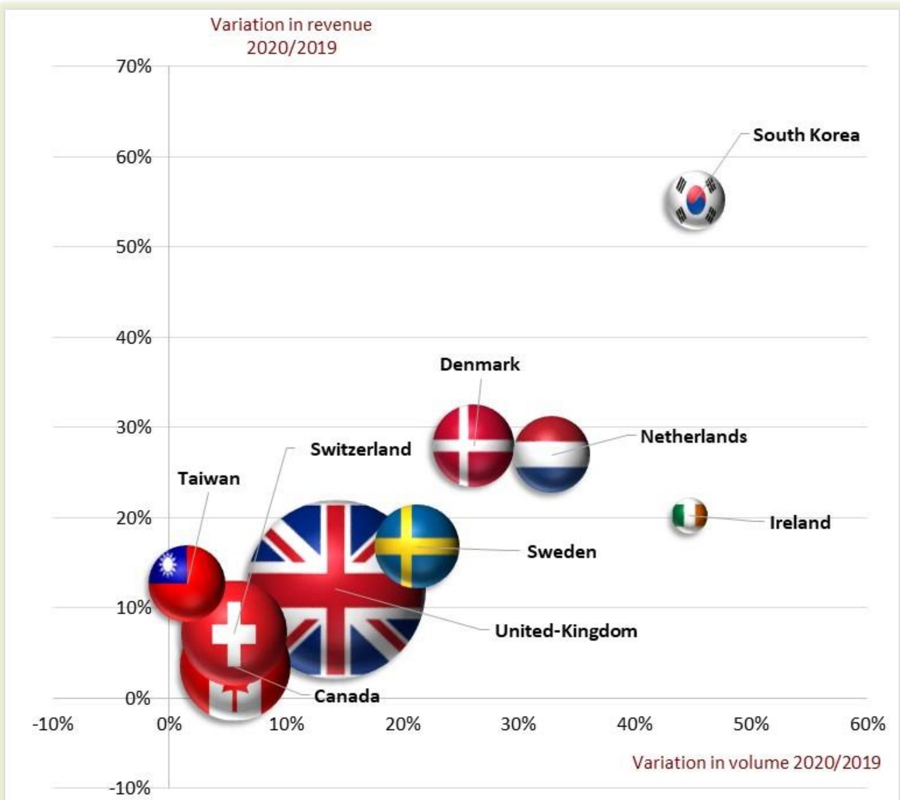
The gravity of the waves of the Covid-19 pandemic and its variants, the speed with which vaccination strategies were put in place, and the vigorousness of health and economic policies are all factors in the list of countries that import Bourgogne wines and which helped maintain performance in 2020.

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 *AOC*s), 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.

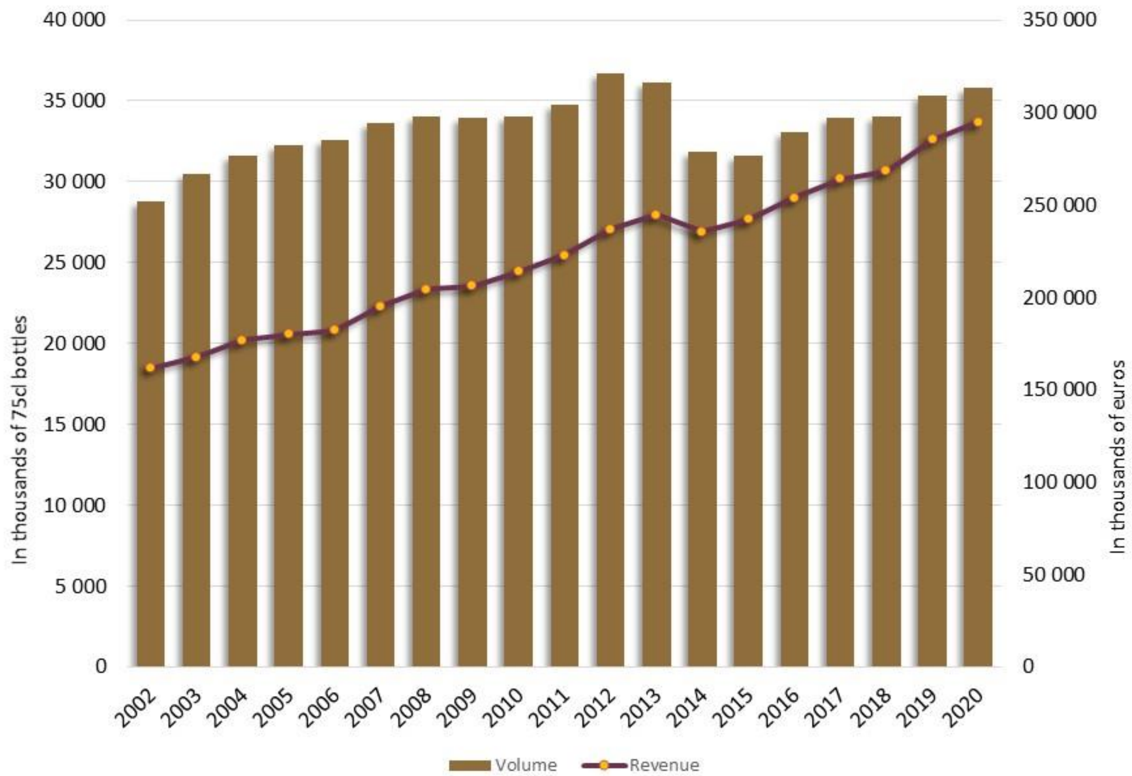
Bourgogne white wines were up 7% by volume on 2019, with notable gains for Bourgogne Aligoté (up 4.6%), the Bourgogne *AOC* (up 3.4%), Chablis (up 15.9%), Pouilly-Fuissé (up 9.3%), Saint-Véran (up 17.4%), Saint-Bris (up 9.9%), and Montagny (up 6.9%).

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%).

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)



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

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