

United Kingdom

Bourgogne confirms its return to growth in 2020



Key figures 2020 for Bourgogne wines in the UK

The leading market by volume for Bourgogne wines

The second-biggest market in terms of revenue for Bourgogne wines

Exports: 16.36 million bottles (up 9.6% over 2019), worth €164 million (up 12.4%)

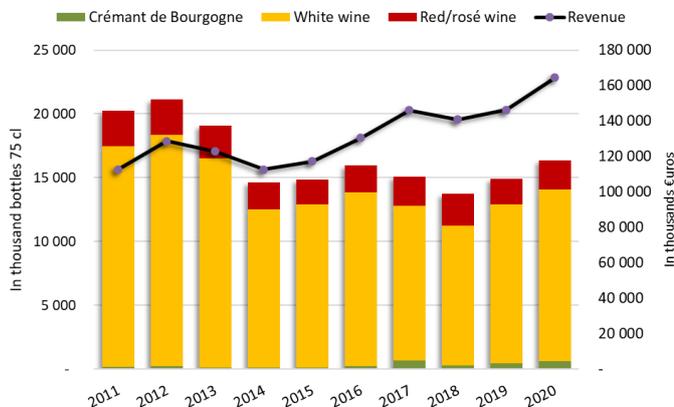
of which by volume	→ Still white wines:	82%
	→ Still red/rosé wines:	14%
	→ Crémant de Bourgogne:	4%

In 2020, Bourgogne wines accounted for 12% of the total volume of French AOC wine exported to the UK for 16% of the revenue.

As we wait for the new rules related to Brexit to be introduced, the UK increased its wine imports in 2020, up 8.3% by volume and 1.2% in terms of revenue compared to 2019. This was particularly beneficial for French wines, which reclaimed market share and were up 6.6% by volume and 0.7% in terms of revenue compared to 2019.

2020: An excellent year for Bourgogne wines after a strong performance in 2019

Bourgogne Wines export in the United-Kingdom
(source: Customs DEB+DAU/BIVB)



In 2020, Bourgogne wines confirmed their return to this market after two years of decline:

- ✓ Up 9.6% by volume compared to 2019 (an increase of 1.4 million bottles)
- ✓ Up 12.4% in terms of revenue (up €18 million)

In 2020, Bourgogne enjoyed the second-best growth for any French AOC winegrowing region in terms of revenue. Among these regions, Bourgogne showed the greatest increase in revenue, up €13.6 million compared to 2019. Bourgogne also showed the second-best growth by volume for French white-AOC-producing regions, up 1.02 million bottles.

The first quarter of 2021 confirmed the good health of Bourgogne wines on this market, with an increase in revenue of 6.9%, worth some €2 million compared to Q1 2020. A slight decline in volumes of 4.8% during this period was mainly due to worries over new obligations at the beginning of the year. The recovery began in March.

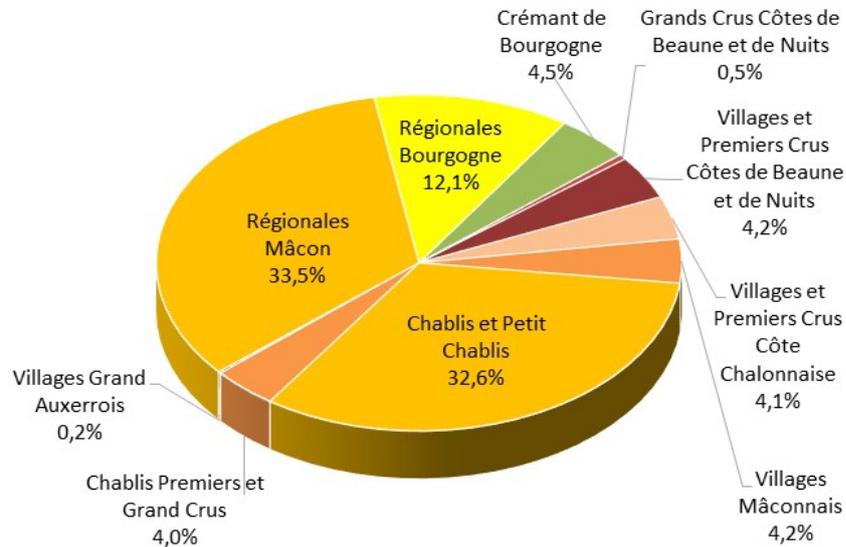
Bourgogne reds experienced very good growth, by both volume and revenue, up 29.8% and up 25% compared to Q1 2020. White wines, however, fell 9.3% by volume and 2.3% in terms of revenue.

Growth by both volume and revenue for Bourgogne *Régionale* AOCs, up 13.8% and 150.8% respectively, did not compensate for the decline of the Chablis and Mâcon *Régionale* AOCs on this market.

New post-Brexit export rules will finally be applied on 1 July 2021. This respite and the arrival of the very fine 2019 vintage on the market should ensure a good performance for H1 2021 for a large number of Bourgogne AOCs.

White Bourgogne wines still in the majority

Export volume of Bourgogne wines 2020 White wines and Crémant de Bourgogne



Sales of white Bourgogne wines still dominate in the UK (see graph on page one). For the past twenty years, the growth in exports to the UK has been mainly focused on this color, which accounted for 82% of bottles shipped in 2020, equivalent to 13.45 million bottles (up 8.2% compared to 2019), worth €100 million (up 15.7%).

This impressive growth was due to the popularity of three groups of appellations:

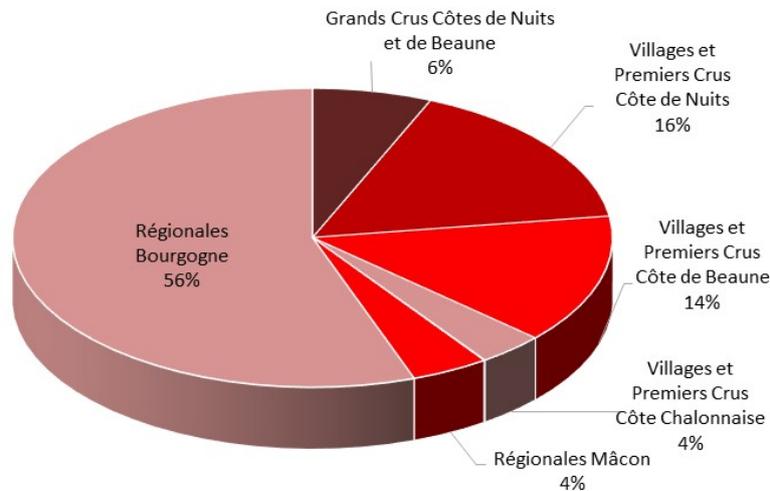
- ✓ The **Chablis appellations** sat in first place for exports by volume in 2020 and accounting for 38% of white Bourgogne wines exported. They performed well; up 12.7% by volume and 9.3% in terms of revenue compared to 2019. The latter was driven by the return to larger volumes with the 2018 vintage.
- ✓ **Mâcon Régionale AOCs**, including Mâcon plus a geographical denomination and Mâcon-Villages wines, were in second place by volume in 2020 with 35% of Bourgogne white wines exported. These AOCs remained stable by volume and were up 3.6% in terms of revenue compared to 2019.
- ✓ **Bourgogne Régionale AOCs** (including Bourgogne plus a geographical denomination wines) accounted for 13% of white Bourgogne wines exported to this market and enjoyed very good growth in 2020; up 11.2% by volume and 13.3% in terms of revenue compared to 2019.

In the first quarter of 2021, of these three groups, only the white Bourgogne AOCs showed growth (up 13.8% by volume compared to Q1 2020). This could not compensate for the decline in export volumes of the Chablis, Petit Chablis and Mâcon Régionale AOCs.

On the other hand, other white AOCs enjoyed good growth by volume in the first quarter:

- ✓ *Village AOCs* from the Mâconnais were up 56.2% compared to Q1 2020
- ✓ *Village AOCs* from the Grand Auxerrois shipped over 560,000 bottles, compared to fewer than 10,000 in Q1 2020
- ✓ *Chablis Premier and Grand Cru AOCs* were up 5.9% by volume compared to Q1 2020

Export volume of Bourgogne wines 2020 Red wines



Red wines accounted for 14% of bottles of Bourgogne wine shipped in 2020, with 2.3 million, worth €61.6 million. Unlike in 2019, red wines experienced fine growth in exports, up 11.5% by volume and 6.2% in terms of revenue.

All AOC groups did well, except for *Village* and *Premier Crus* from the Côte de Nuits (16% of volumes shipped, down 1.6% compared to 2019). This decline was easily offset by other red Bourgogne AOCs, including:

- ✓ **Bourgogne Régionale AOCs** (including Bourgogne plus a geographical denomination wines) which represented 55% of the volumes of red Bourgogne wines, enjoy very good growth; up 19.3 by volume and up 24.9% in terms of revenue compared to 2019.
- ✓ **Village AOCs and Premier Crus from the Côte de Beaune** (14% of red Bourgogne wine volumes) also did very well; up 4% by volume and 7% in terms of revenue.
- ✓ **The Mâcon Régionale AOC** (including Mâcon-plus a geographical denomination wines) contributed less to volumes, with around 95,000 bottles, but also showed very good progress, and up 22.2% by volume and 15.5% in terms of revenue.

In Q1 2021, red wines did very well, showing an increase in terms of both volume and revenue, up 29.8% and 25% respectively. Bourgogne Régionale AOCs (including Bourgogne plus a geographical denomination wines) experienced very good momentum and were up 23.5% by volume (with 54% of volumes in Q1 2021) and 284% in terms of revenue over Q1 2020.

To a lesser extent, given their limited market share, the *Grand Crus* of the Côtes de Nuits and Côte de Beaune (up 292.5% by volume and 22% in terms of revenue) and the Mâcon AOC, including Mâcon plus a geographical denomination wines (up 177.3% by volume) also showed a good start.

Bourgogne wines across all distribution channels

In restaurants: Bourgogne wines are very well represented in London

In London, Bourgogne wines ranked first in the global wine offer. They accounted for 19% of wines on offer, up two points over 2018, with an average of over 30 references per establishment surveyed. The number of references grew by 14% compared to 2018.

White wines:

- Chablis AOCs were present in 75% of establishments, making it the leading group of AOCs in terms of all white Bourgogne wines.
- White *Village AOCs* and *Village Premier Crus* from the Côte de Beaune were in first place in terms of the number of references offered amongst all white Bourgogne wines, with 2,087 references for a 12% share.

Red wines:

- Bourgogne was in second place in terms of number of references per international wine producing region, with 15% of the offer of red wines. This is a point up on 2018.
- In top spot amongst Bourgogne appellation groups were *Village AOCs* and *Village Premier Crus* of the Côte de Nuits, stocked in 45% of restaurants surveyed. They were followed by the *Village AOCs* and *Village Premier Crus* of the Côte de Beaune (39%), and Bourgogne *Régionale AOCs* (31%)

(Source: 2019 survey of 350 London restaurants)

London wine stores

Bourgogne ranked first in terms of presence, featuring in 92% of establishments. Bourgogne wines were also in the top spot in the world wine offer in terms of the number of references, with each point of sale offering an average of 45 different Bourgogne wines.

In terms of the global offer of white wines, the Chablis AOC was in first position, available in 66% of establishments. The Mâcon AOC, including Mâcon plus a geographical denomination wines was also in the top 10 of AOC groups, available in 54% of establishments surveyed.

Bourgogne was the second winegrowing region in terms of the number of references in the global red wine offer, with an average of 23 per establishment. It was first in terms of presence in the establishments surveyed (92%). With regard to the leaderboard for number of references, *Village AOCs* and *Village Premier Cru* reds from the Côte de Nuits were in the top spot with *Village AOCs* and *Village Premier Cru* reds from the Côte de Beaune coming in second place.

(Source: 2019 survey of 50 outlets)

In supermarkets

In 2020, Bourgogne sold 7.2 million bottles of still wine via this channel, up 7% compared to 2019, for revenue of £70.9 million, up 11% on 2019.

White wine sales were up 9% by volume while red wine sales decreased by 1%. The Chablis AOCs accounted for nearly half of volumes sold, while Mâconnais wines accounted for more than a third of sales of white wines but only 15% of the revenue, while Bourgogne *Régionale* wines excluding Aligoté (11% of sales) showed growth of 33% with 150,000 bottles, accounting for 30% of the revenue for white wine exports to this channel in 2020.

Market report written by the Markets and Development arm of the BIVB - May 2021

(Sources: GTI - Customs - IRI UK - BIVB - MIBD MARKET)

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