



BOURGOGNE
Bourgogne Wine Board

USA: 2021 marks the return of Bourgogne wines after 2020 which was impacted by taxes



Key 2020 figures for Bourgogne wines in the United States

1st export market for Bourgogne wines in terms of value

2nd largest export market for Bourgogne wines in terms of volume

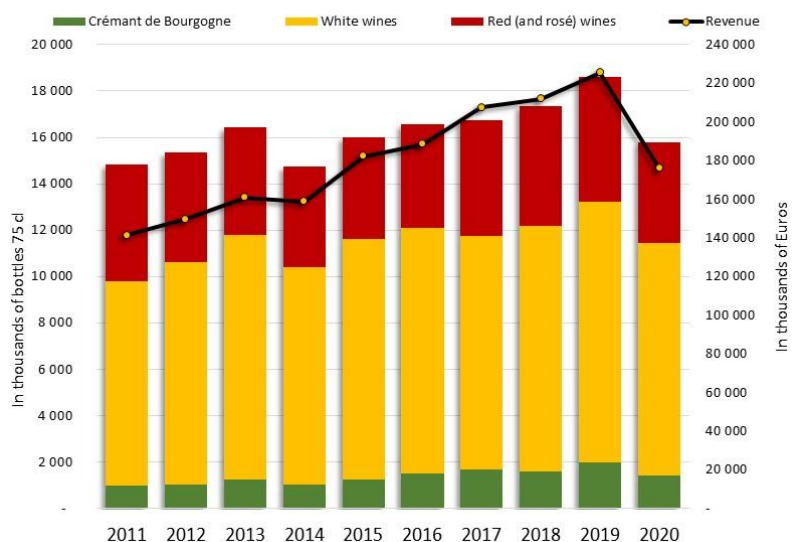
Exports: 15.8 million bottles (-15.2% / 2019) valued at 175.9 million euros (-22% / 2019)

By volume	→ Still white wines:	64 %
	→ Still red/rosé wines:	27 %
	→ Sparkling wines:	9 %

In 2020, Bourgogne wines represented 11.3% of the volume of French AOCs exported to the United States, and accounted for 14.3% of sales.

After Covid-19 and the tax levy in 2020, Bourgogne is set to grow again in 2021

Exports of Wines to the USA
Source: Custims DEB+DAU / BIVB



As of mid-October 2019, Bourgogne wines (excluding Crémant de Bourgogne) suffered from President Trump's decision to impose 25% *ad valorem* taxes, as part of the Boeing/Airbus dispute. This economic choice was aggravated by the consequences of the Covid-19 pandemic (closure of restaurants, wine bars, confinement, suspension of air shipments...).

This inevitably led to a drop for Bourgogne wines on the American market in 2020:

- ✓ Down 15.2% by volume / 2019
- ✓ Down 22% by value / 2019

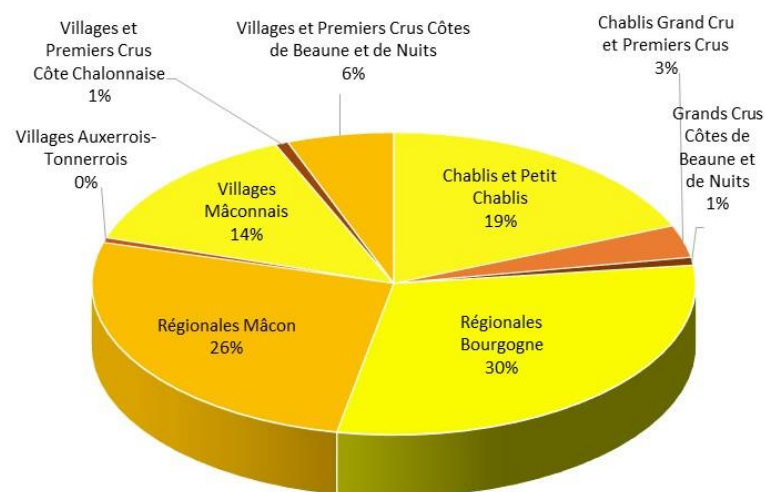
Unsurprisingly, the removal of the 25% tax along with the reopening of restaurants and other wine consumption venues is leading to a **sharp rebound in Bourgogne wine exports to the United States during the first 5 months of 2021** (compared to the same period in 2020): Up 34.2% in volume and up 43.8% in value.

- ✓ **White wines:** Up 38.1% by volume and up 49.7% by value.
- ✓ **Red and rosé wines:** Up 35.4% by volume and up 41.9% by value.
- ✓ **Crémant de Bourgogne:** Up 4.3% by volume and up 3.5% by value.

Due to the context of 2020, it is also interesting to note an increase 2019, a very good year: + 4.5% in volume and + 0.2% in value / first 5 months of 2019.

65% of the volumes exported to the United States are Régionale AOCs

White wine exports (2020 volumes)



In 2020, as in the past, white Bourgogne wines predominate in Bourgogne's exports to the U.S. market, accounting for 64% of exported volumes (down 10.9% / 2019) for 54% of sales (down 19.6% / 2019).

- ✓ The Bourgogne AOCs (including Bourgogne plus geographical denomination) account for 30% of the volume of Bourgogne white wines (31% of the value)
- ✓ The Mâcon (including Mâcon plus geographical denomination) and Mâcon-Villages AOCs come next and account for 26% of the volume (13% of the value)

✓ Chablis AOCs are in third place, accounting for 22% of the volume (21% of the value). The share of Chablis wines in the Bourgogne white wine offer has suffered considerably from a lack of image, linked to the use of its name by local entry-level products, and remains lower than in other markets. However, in 2020, Chablis AOCs represented 14% of sales for all colors combined.

✓ In 4th position, are the Village AOCs of the Mâconnais which represent 14% of the volume (12% of the value)

In the first 5 months of 2021, there has been a strong performance in this category. White wines have increased: Up 38.1% by volume and up 49.7% by value / 5 months 2020.

All appellation groups are benefiting from this rebound, with the exception of the Chablis Premier Cru and Grand Cru AOCs (down 9.8% in volume), which have for the moment prioritized the European markets. At the same time, AOC Petit Chablis and Chablis are off to an excellent start: Up 77.6% by volume and up 61.2% by value, exceeding 2019 by a wide margin.

Several appellations groups are also showing excellent volumes and turnover compared to 2020, with even higher results than 2019:

- ✓ Régionale AOCs Bourgogne 5(including Bourgogne plus°: Up 74.9% by volume and up 96.1% by value (5 months 2021 / 5 months 2020)
- ✓ Régionale AOCs Mâcon (including Mâcon-Villages and Mâcon plus): Up 6.5% in volume and up 7% by value.
- ✓ Village AOCs of the Mâconnais: Up 7.7% in volume and up 14.2% by value

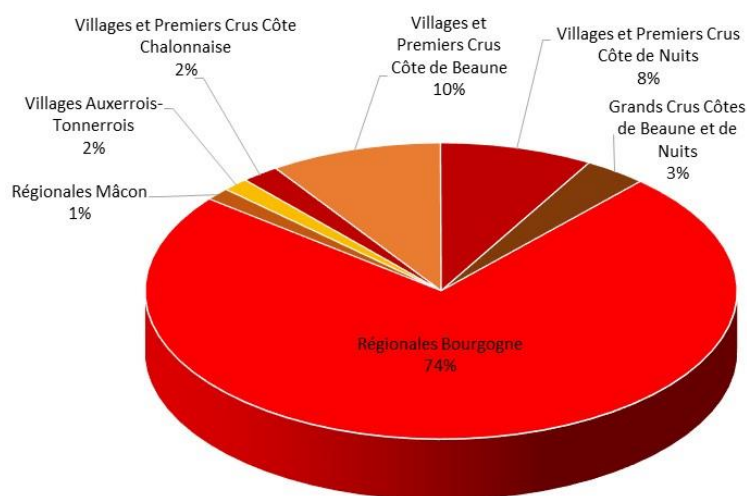
Other appellations are also closing in on the 2019 record year:

- ✓ Village and Village Premier Cru AOCs of the Côte de Beaune and Côte de Nuits: Up 32.6% by volume and up 69.2% by value
- ✓ Village and Village Premier Cru AOCs of the Côte Chalonnaise: Up 28.2% by volume and up 114.2% in value.
- ✓ Grand Cru AOCs of the Côtes de Beuane and de Nuits: Up 7.1% in volume and up 41.6% by value.

As for Crémant de Bourgogne in 2020, it represented 12% of exported volumes for a little more than 4.5% of sales of Bourgogne wines in the USA in 2020. In 2020, Crémant de Bourgogne was still the 2nd most exported French sparkling AOC after Champagne in terms of volume (5.5%) and sales (1.7%).

After a slow start at early 2021, as the peak sales period for sparkling wines is usually at the end of the year. In May, Crémant de Bourgogne benefits from the global rebound in exports. For the five first months of 2021, the sparkling AOC is up 4.3% in volume and up 3.5% by value compared to the same period in 2020.

Exports of red and rosé wines from Bourgogne (2020 volumes)



In 2020, red wines represented 27% of the volumes (down 19.4% / 2019) and 42% of the sales (down 23.8% / 2019) of Bourgogne wines exported to the United States.

The market is largely dominated by two groups of appellations:

- ✓ The **AOC Bourgogne (including Bourgogne plus)** represent the vast majority of sales, accounting for 74% of the volume and 43% of the value of red wines from Bourgogne.
- ✓ In 2nd place, the **Village and Village Premier Cru AOCs of the Côte de Beaune and Côte de Nuits** represent 18% of the volume and 26% of the value of red Bourgogne wines.

During the first five months of 2021, the red wines are also experiencing a strong increase, particularly in May: Up 35.4% in volume and up 41.9% by value compared to the same period in 2020.

All groups of appellations are now reaching very good levels for the period. Some of them even exceed their volumes of the excellent 2019 year:

- ✓ **Village and Village Premier Cru AOCs of the Côte de Beaune:** Up 90.7% by volume and +152.3% by value / 5 first months in 2020 (257,000 bottles; 56,000 more than in 2019)
- ✓ **Village and Village Premier Cru AOCs of the Côte de Nuits:** Up 20% by volume and up 89.2% by value (166,000 bottles)
- ✓ **Régionale AOCs Mâcon** (including some Mâcon plus): Up 113% by volume and +103% by value (40,000 bottles)

Bourgogne Régionale AOCs (including Bourgogne plus) experience a very strong rebound compared to 2020, even if their volumes still remain below the first 5 months of 2019: Up 31.8% in volume and up 38.9% by value with more than 1.7 million bottles (1.8 million for the 5 first months in 2019).

Bourgogne wines quite visible in online sales.

France is present in nearly one out of every five references (19%), ahead of Italian wines (13%).

Concerning the red wine market, Bourgogne is present on 2/3 of all websites and accounts for 5% of the references (34 references per website on average), and offers a highly valued range of wines, mainly from the Village, Village Premier Cru and Grand Cru AOCs of the Côte de Beaune and Côte de Nuits.

For white wines, Bourgogne is present on 3/4 of all websites, totaling 8% of the offer (almost half of the French offer), with a more diversified range. Most AOC vineyard groups are referenced on half of the sites.

In the sparkling wine segment, Crémant de Bourgogne (1% of the offer) is present on 1/4 of all websites, thus establishing the USA as the priority export destination for this AOC.

Survey of 2019 offers in the United States from 50 websites

Market report written by the Markets and Development arm of the BIVB – July 2021

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

Contact :

Cécile Mathiaud – Head of Media Relations at the BIVB at BIVB

Tel. + 33 (0)3 80 25 95 76 – Cell +33 (0)6 08 56 85 56 - cecile.mathiaud@bivb.com

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