



BOURGOGNE
Bourgogne Wine Board

United Kingdom

A market where Bourgogne AOCs are increasingly valued

Key figures 2021 for Bourgogne wines in the UK

2nd largest market by volume and value for Bourgogne wines

Exports: 16.85 million bottles (+ 3% / 2020), representing 202 million euros (+ 23% / 2020)

of which by volume → Still white wines: 77 %
→ Still red/rosé wines: 19 %
→ Crémant de Bourgogne: 4 %

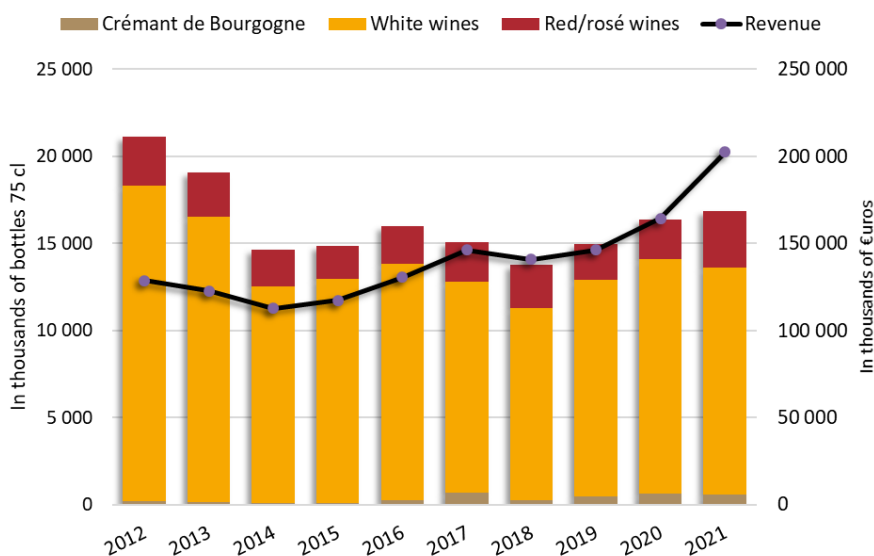
In 2021, Bourgogne wines represented 13% of the volume of French AOC exported to the UK, accounting for 16.6% of sales in this category.

Sales of Bourgogne white wines largely dominate exports of French AOC white wines to the UK. In fact, over the last twenty years, the development of Bourgogne exports to the United Kingdom has been mainly focused on white wines: 77% of bottles shipped and 56% of sales in 2021. This incredible growth has been based on the strong reputation of Chablis and is now supported by the wines of the *Régionale* AOC Mâcon¹.

In 2021, red wines led growth by volume

Bourgogne wine exports in the United Kingdom

(source: Douane DEB+DAU / BIVB)



For the first time since 2016, Bourgogne wines registered a third consecutive year of growth in the UK:

- ✓ Up 3% by volume / 2020 (the equivalent of 487,000 75cl bottles)
- ✓ Up 23% by value / 2020 (+38 million euros)

For white wine from French AOC vineyards, Bourgogne experienced the greatest increase in turnover: Up 13.6 million euros (2021/2020). For over 20 years, Bourgogne has held the top position in terms of sales among French AOC vineyards in this color. However, the volumes of Bourgogne whites are declining, reflecting the fall in exports of its

two main groups of AOCs: Down 33% for Chablis wines and down 34.8% for the *Régionale* AOC Mâcon¹.

On the other hand, red wines grew well in 2021: Up 971,000 bottles 75 cl / 2020. Bourgogne even had the best growth of any French AOC vineyard. Healthy sales also earned Bourgogne second place in terms of growth among French AOC vineyards (Up 24 million euros / 2020), representing a growth of +42.7% / 2020. This represents a double record for the last 10 years, in volume and in sales.

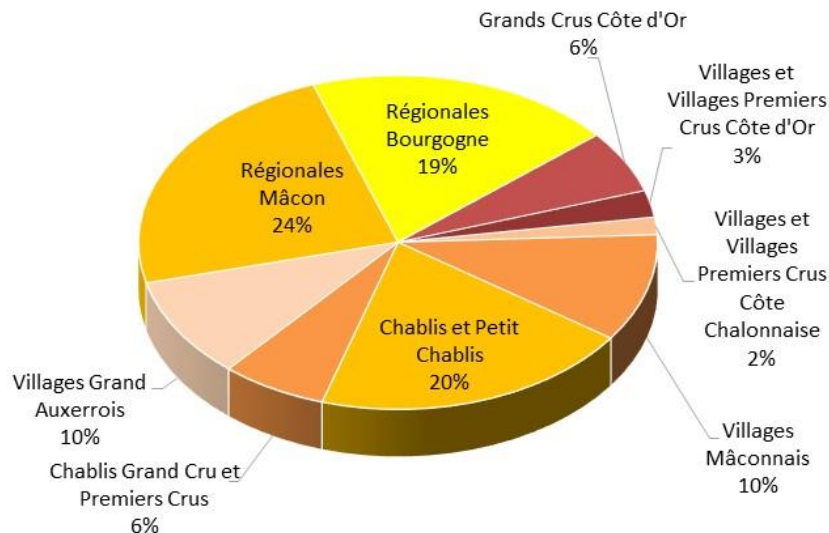
Over the first two months of 2022, the overall trend is on the rise for all three colors.

¹ AOC Mâcon: Mâcon + Mâcon-Villages + Mâcon plus geographical denominations

Red wines are progressing but still have room to grow

Export by volume of Bourgogne wines 2021

White wines



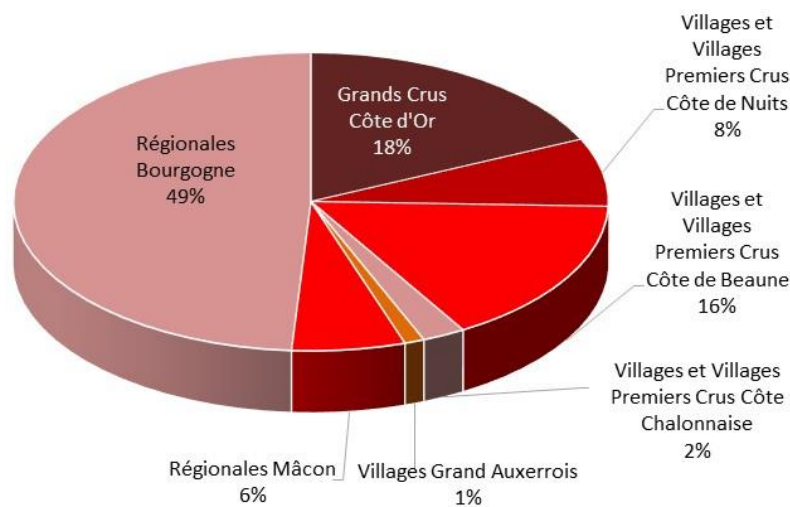
In 2021, sales of white Bourgogne wines were still very dominant across the Channel (*see graph on page 1*). For the past twenty years, the development of Bourgogne wine exports to the United Kingdom has been mainly focused on this color. It represented 77% of the volume shipped in 2021 -equivalent to 13 million 75cl bottles (Down 3.2% / 2020), worth 113.8 million euros (Up 16.9% / 2020).

This incredible growth can be explained by the strong presence of three groups of appellations:

- ✓ The Chablis appellations were in first place in both volume and sales in 2021, accounting for 27% of the white wines of Bourgogne exported for 26% of sales.
The decreases experienced are a cumulative effect of Brexit, the pandemic, the occurrence of small harvests and the rise in range of Chablis wines. The quest for value is reflected by a more significant drop in volume than in sales.
Chablis Grand Cru and Chablis Premier Cru wines continue to grow in volume (Up 51% / 2020) as well as in revenue (Up 30% / 2020)
- ✓ The *Régionale* AOC Mâcon (including Mâcon plus geographical denomination and Mâcon-Villages) is in second place by volume in 2021, with 24% of Bourgogne white wines exported.
After two record years in volume, these AOCs are experiencing a decline in volume (Down 34.8% / 2020), probably the result of a search for more valuable wines visible by a more significant decline in volume than in sales (Down 16% / 2020)
- ✓ The *Régionale* AOC Bourgogne (including Bourgogne plus geographical denomination) represent 19% of the volumes of white Bourgogne wines exported to this market, benefiting from very good growth in 2021: Up 46.8 by volume and up >100% in turnover / 2020.
The strong resurgence of these AOCs in this market has greatly offset the losses in turnover of the two leading groups of AOCs of Bourgogne white wines, but it could not make up for their loss in volume over 2021.

Export by volume of Bourgogne wines 2021

Red wines



In 2021, red wines represented 19% of bottles of Bourgogne wines shipped (3.2 million 75cl bottles, valued at 85.8 million euros). They continued to grow well as they did in 2020: Up 42.7% by volume and up 39.3% in sales / 2020. In the process, they set a double record (by volume and in sales) over the last 10 years.

The main groups of AOCs are seeing their exports grow, with the exception of the Village and Village Premier Cru AOCs of the Côte de Nuits (7% of volumes shipped in 2021, down 35% by volume / 2020). But this slowdown is clearly compensated by the other groups of appellations, among which:

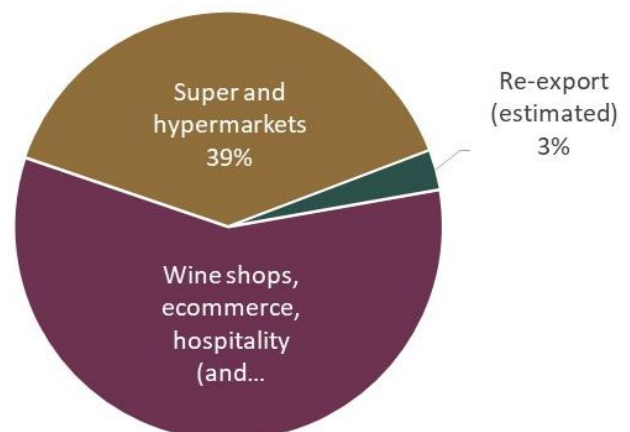
- ✓ The *Régionale* AOC Bourgogne (including Bourgogne plus geographical denomination) which represent 49% of the volumes of red wines of Bourgogne, enjoyed very good growth: Up 26% by volume and up >100% in sales / 2020.
- ✓ The Village and Village Premier Cru AOCs of the Côte de Beaune (16% of the volume of red wines shipped) also did very well: Up 62.8% by volume and up 40% in sales / 2020.
- ✓ The *Régionale* AOC Mâcon (including Mâcon plus geographical denomination) represents a smaller share of volumes (6% of red wine volumes shipped), but also progressed very well: Up >100% by volume and up >100% by value / 2020.

Present in all distribution channels, Bourgogne wines benefit from the demand for Premium wines

According to our estimates, sales of Bourgogne wines to Great Britain are primarily in premium channels (wine shops, gourmet stores, restaurants, and online wine sales account for about 58%).

The mass market remains stable at 39%, mainly for *Régionale* appellations.

A proportion of Bourgogne wines imported into the UK is also re-exported to Asian markets (mainly Hong Kong), Ireland and the USA.



Britain is a market of regular wine consumers (50% of the adult population), with 78% even consuming wine weekly. These regular consumers are on the rise (Up 11.5% 2021 / 2017), as are those who consume wine every week (up 8.5% 2021 / 2017).

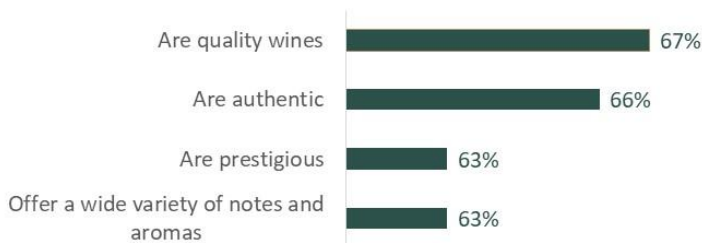
This population tends more towards premium wines: Sales of £9-£10 wines have thus increased by up 18% and those over £10 by up 21%. This trend has benefited Bourgogne wines, which are mostly sold for more than £10.

As the population of regular consumers is aging (56% over 55 years old in 2021 compared to 38% in 2011), Bourgogne's wine professionals are increasingly targeting millennials. Given this context, in 2021 the Bourgogne Wine Board (BIVB) undertook a survey of 23-45 year olds in three countries².

The good news is that wine is the most consumed alcohol by british millennials (73%), and this starts with the aperitif. They drink more regularly than in France, in the evening, at home, and with their spouse or friends. Although they primarily buy wine in supermarkets (55%), they also prefer specialized stores such as wine shops, gourmet food stores (28%) and online sales of these stores (22%). The main advantage of these sales outlets is probably the advice they give, as well as the quality of the products offered and the stories that accompany them.



The images most associated with Bourgogne wines among British millennials



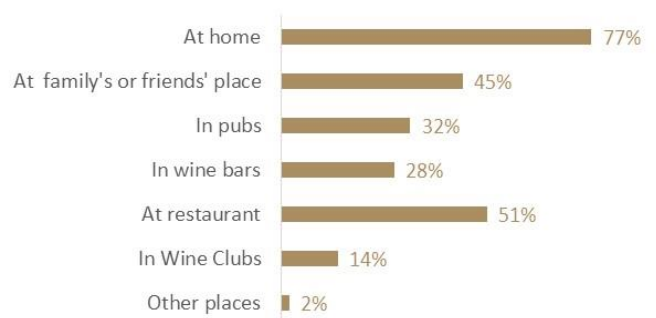
One of the most significant assets of Bourgogne wines for this segment of consumer is of course the quality of the wines (67% of the population associate Bourgogne wines with quality).

It is also the authenticity of these wines which are produced by companies that are often family owned, the diversity of expressions of the 84 AOCs made from Pinot Noir, Chardonnay, Aligoté, Gamay and even Sauvignon, and the reputation of a region that is rich in history and has been around for 2,000 years (see graph on the left).

While they primarily consume wine at home (77% at home, 45% with friends and family), British millennials also tend to frequent restaurants (51%), pubs/bars (32%) or wine bars (28%).

While the restaurant industry has not yet returned to its 2017 level (pre-Covid-19), these results inspire confidence, especially since regular wine drinkers aged 18 to 34 were the most likely to buy wine in restaurants and pubs or bars in 2021³.

Where they usually drink wines



² Kantar survey of 1,011 people drinking alcohol, aged between 23 and 45 years old in 2021

³ Source : Wine Intelligence

In supermarkets (hypermarkets and supermarkets)

In 2021, Bourgogne sold nearly 6.6 million bottles of still wine in the English supermarket sector (- 8.5% / 12 months to the end of Dec. 2020), for a turnover of nearly 66.5 million pounds (- 6.4% / 12 months to the end of Dec. 2020).

- ✓ Sales of white Bourgogne wines to supermarkets (72% of the volume of Bourgogne wines) fell 16.4% by volume in 2021, against a backdrop of two main groups of appellations moving upmarket:
 - Chablis wines (- 26% by volume in 2021 / 2020, but with an increase in sales of + 11%)
 - Mâcon-Village (-10% by volume yet +2% increase in sales)
- ✓ Sales of Bourgogne reds in this segment are increasing. They now represent 28% of the volume of Bourgogne wines sold, doubling the record volume and value of the last 10 years. They represent 1.8 million bottles (+20% / 2020) and 15 million pounds (+16.8% / 2020).

Sales of Crémant de Bourgogne took off in this segment in 2021: A total of 400,000 bottles were sold (+ 156% / 2020), and the appellation was present in more stores (8% in 2021 compared to 3% in 2020).



© BIVB / Image & Associés

This economic report was written with the Markets and Development Unit - BIVB - May 2022

(Sources: GTI - Douanes – IRI UK – MIBD Market - Wine Intelligence - BIVB)

Contact:

Cécile Mathiaud – Head of PR at the BIVB

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

Find all our press releases and thousands of rights-free photos in our online press room at: www.bourgogne-wines.com

To sign up for our news alerts: [click here](#).

FOLLOW US:

