

## Japan - Bourgogne wines return to growth in 2021



### Key figures for 2021 for Bourgogne wines in Japan

3<sup>rd</sup> biggest market in terms of revenue for Bourgogne wines

5<sup>th</sup> biggest market by volume for Bourgogne wines

**Exports: 8 million bottles (up 10.2% on 2020) for 120 million euros (up 8.1% on 2020)**

by volume

→ White wine:	55%
→ Red wine/rosé:	41%
→ Crémant de Bourgogne:	4%

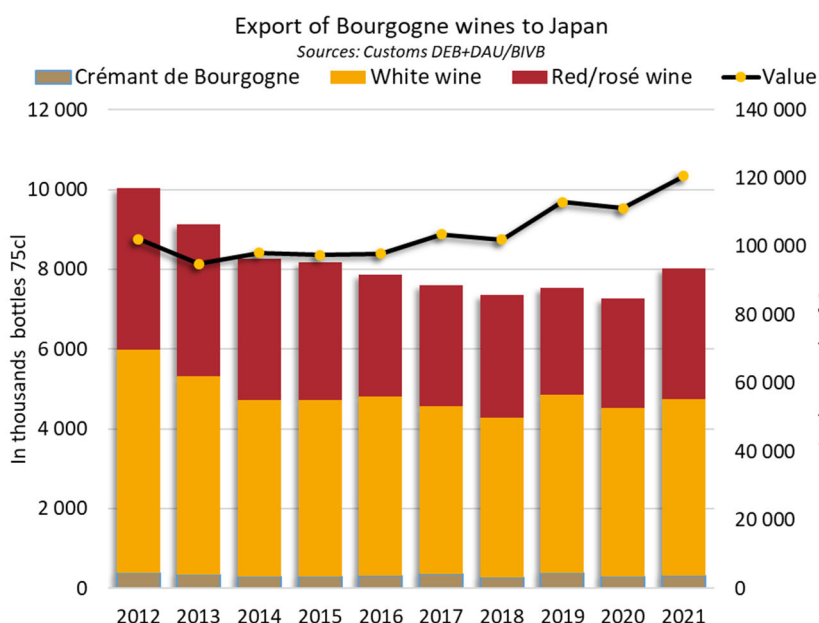
In 2021, Bourgogne wines accounted for 17% of the volume of French AOC wines exported to Japan, for 25% of the revenue in this category.

Following the free trade agreement signed in 2018, French wines enjoyed record sales from 2019 onwards. The pandemic in 2020 marked a pause in exports, but 2021 saw a return to the record revenues of 2019, mainly thanks to three winegrowing regions, namely Champagne, Bordeaux, and Bourgogne, which together account for 77% of French wine exports in terms of revenue.

However, Bourgogne is the only one to have increased its record revenue, with 120.6 million euros. Although the wines exported are mainly Bourgogne and Chablis AOCs, a growing demand for top-of-the-range wines should see Bourgogne wine exports expand further. The growing interest in wine in Japan and the growth of this market, driven by women and city-dwelling young people, is encouraging optimism.

Bourgogne wines have long enjoyed an aura in Japan, a country whose culture, tastes, and values fit well with them. Those in the Bourgogne wine trade are nonetheless seeing a generational shift with more and more customers under the age of 50 for more affordable and lesser-known *Régionale* and *Village* AOCs.

### Bourgogne wines enjoying the revival



In 2021, Bourgogne wines returned to growth in Japan, compared to 2020:

- ✓ Exports by volume were up 10.2% (up 6.6% for French AOCs)
- ✓ Exports by revenue were up 8.4%

Bourgogne reds were the big winners with double growth of 18.9% by volume and 15.2% in terms of revenue.

Crémant de Bourgogne wines still have a small market share with 4% of volumes exported, but were in second place in terms of growth, up 6.8% by volume and 15% in terms of revenue.

Although relatively minor compared to volumes produced, this AOC offers a lot of potential for growth in a market looking for sparkling wines with an excellent quality-price-pleasure ratio.

White Bourgogne wines, which accounted for most of the volume (55% in 2021), also showed growth by volume (up 4.7% on 2020), with revenue in 2021 almost the same as that in 2020 (up 0.4% on 2020).

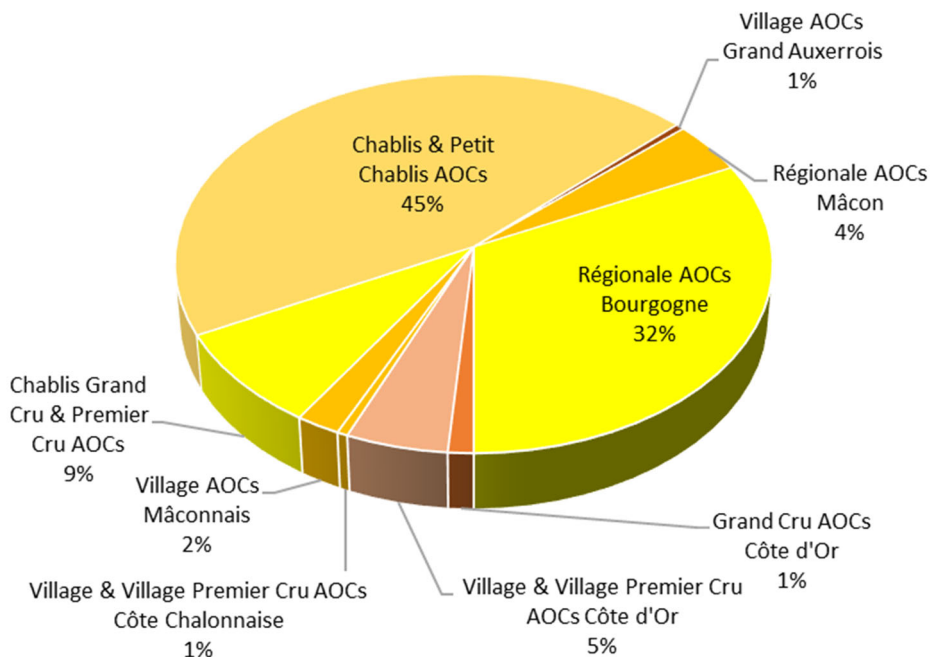
The first three months of 2022 saw a decrease in volumes, mainly due to the very small 2021 harvest, which impacted the availability of Bourgogne wines (reduced allocations). Revenue, which was up, was mainly driven by white and red *Grand Crus*, along with red *Village* and *Village Premier Cru* wines from the Côte de Beaune.

## Red wines driving growth in 2021

Japan is an historic market for Bourgogne wines, and a mature one, too. It imports all categories of AOC, even if these are mostly dominated by white wines (*see above*).

### Exports of white wines in 2021 by volume

White Bourgogne wines have historically accounted for a large chunk of this market, between 54% and 60% of volumes exported over the past decade (55% in 2021).



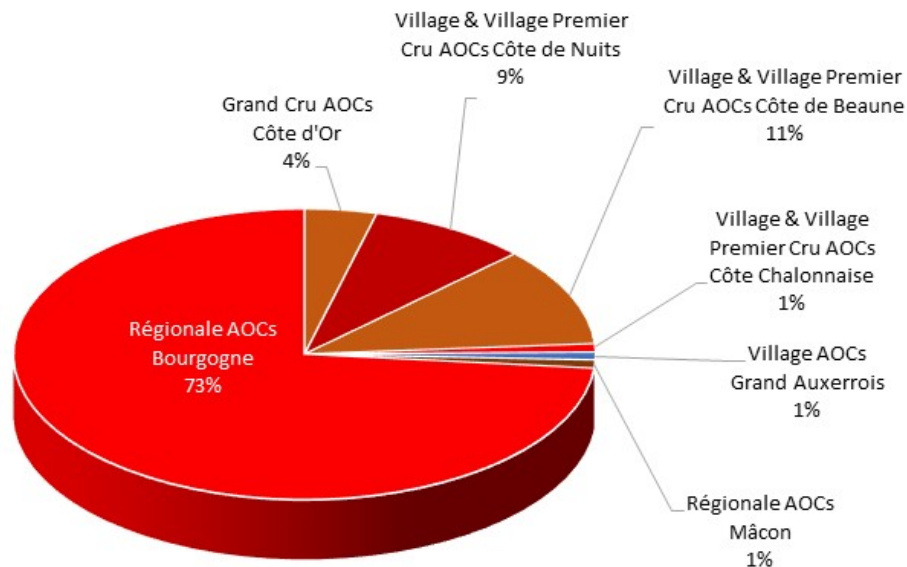
Chablis wines contributed a lot to the growth in sales of white Bourgogne wines (54% of volumes of white wine exported). In 2021, these appellations continued to flourish, profiting from the return to growth: Up 11.3% by volume and up 0.5% in terms of revenue on 2020.

*Régionale Bourgogne AOCs*<sup>1</sup> also accounted for a significant market share of white wine exports (32% of volumes). After two very good years of growth by volume in 2019 and 2020, these wines stabilized in 2021 at 1.4 million bottles exported.

<sup>1</sup> *Régionale Bourgogne AOCs*: Bourgogne AOC (including Bourgogne plus geographic denomination), Bourgogne Aligoté, Bourgogne Passe-Tout-Grain, Coteaux Bourguignons, etc.

**Over the first three months of 2022**, exports of white Bourgogne wines by volume grew slightly compared to the same period in 2021, with revenue that continues to grow. White *Régionale* Bourgogne<sup>1</sup> AOCs accounted for 44% of volumes exported and 47% of revenue from white Bourgogne wines in Q1 2022.

**Exports of red wines in 2021 by volume**



In 2021, red Bourgogne wines accounted for 41% of volumes of Bourgogne wines exported to Japan, for 56% of the revenue. Exports of red wines by volume showed growth for the second consecutive year, topping 3.3 million bottles.

The majority of exports by volume were of red *Régionale* Bourgogne appellations, accounting for 73% of volumes and 51% of the revenue for this color; the equivalent of 2.4 million bottles and 34 million euros.

*Grand Crus*, *Village Premier Crus*, and *Village AOCs* from the Côtes de Beaune and Côte de Nuits also contributed to this growth, thanks to a leap of 45.2% by volume compared to 2020. As such, they accounted for 24% of volumes and 47% of revenue of red wine exports in 2021.

**Over the first three months of 2022**, red Bourgogne wines dipped by volume compared to the first three months of 2021; a consequence of low availability in the Bourgogne winegrowing region. Growth remained nonetheless positive over the five-year average. Revenue for Q1 2022 continued to grow.

*Market report written by the Markets and Development arm of the BIVB – July 2022*  
 (Sources: Customs DEB+DAU - MIBD Market – Wine Intelligence - BIVB)

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