

United Kingdom: Relative stability prior to the arrival of the attractive 2022 vintage

Key figures for the first nine months of 2023 for Bourgogne wines in the United Kingdom

Bourgogne wines' second biggest market in terms of volume and value

Exports: 9.6 million bottles (down 3.2% compared with the same period in 2022), for €173.7 million (an increase of 10.4 % for the first nine months of 2023)

made up in volume of

- Still white wine: 76%
- Still red/rose wine: 18%
- Crémant de Bourgogne: 6%

Bourgogne wines make up **12% of the volume of French AOC wine exported to the UK**, for 18% of turnover in this category (over the first nine months 2023).

Despite a faster-than-expected recovery at the start of the year, Great Britain is the only G7 member not to have returned to its pre-pandemic level of economic activity. And there are other indicators worrying economists: inflation remains high, as do interest rates on loans which are making people poorer and exacerbating pessimism for businesses.

In 2023, Bourgogne wines continued to grow

For the first time since 2013, Bourgogne wines posted a fifth consecutive year of sales growth in the United Kingdom, despite a decline in volumes. This is mainly due to the time it took for Bourgogne wines to return to the market, after the historically low harvest of 2021.

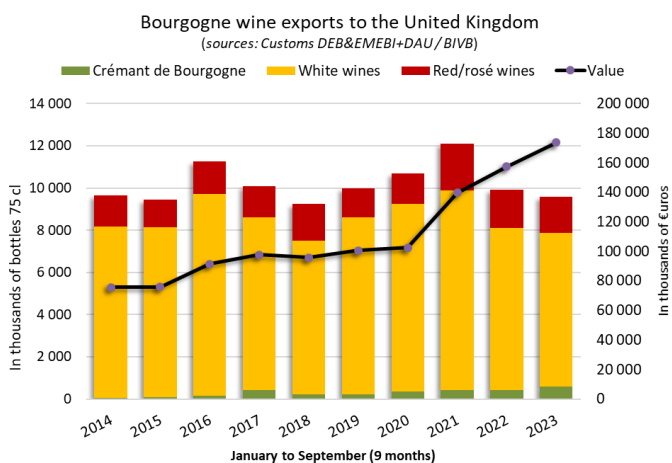
Exports of Bourgogne wines to Great Britain:

- ✓ Up 10.4% in value compared with the first nine months of 2022 (up €16.3 million)
- ✓ Down 3.2% in volume compared with the first nine months of 2022 (down the equivalent of 320,000 75cl bottles)

Sales of Bourgogne white wines largely dominate French AOC white wines exported to the UK. Over the last 20 years, the growth of Bourgogne wine exports to the UK has been mainly concentrated on white wines: they now represent 76% of bottles of Bourgogne wine shipped, for 51% of turnover (first nine months of 2023). This incredible growth has been driven by the strong reputation of Chablis wines.

In the first nine months of 2023, Bourgogne was the French AOC wine-growing region with the biggest increase in white wine sales: Up €26.7 million (in the first nine months of 2023 compared with the same period in 2022). For more than 20 years, Bourgogne has held on to its number one position in terms of white wine sales among French AOC wine areas. Exports by volume are declining, but less than in the previous period.

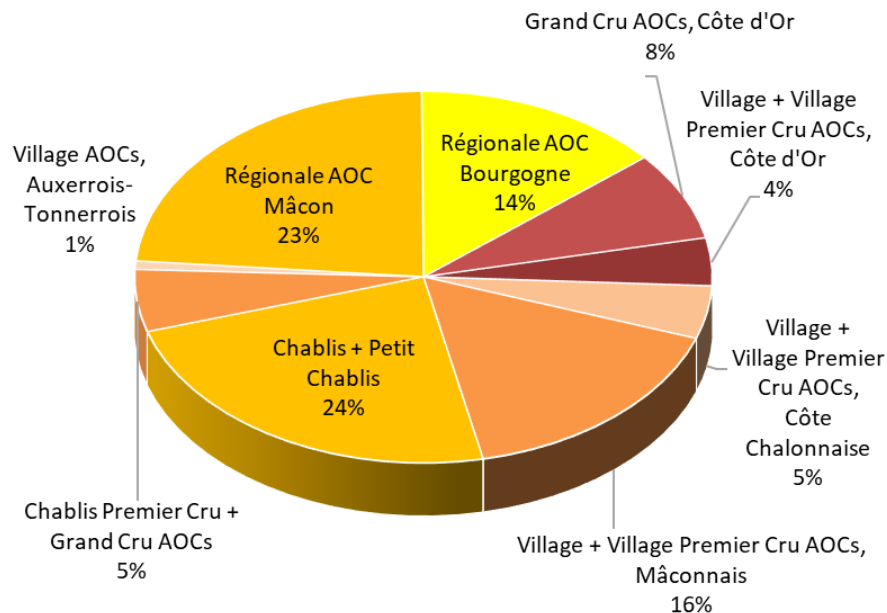
Sales of red wines are also progressing well: Up €11.8 million compared with the first nine months 2022. Bourgogne in fact achieved the biggest increase in reds among French AOC wines.



At the same time, export volumes fell by 5.6% (in the first nine months of 2023 compared with the same period in 2022), impacted by the downturn in the Bourgogne AOC (down 17.4% compared with the first nine months 2022), which still remains the most exported appellation to the United Kingdom.

Every level of appellation finds market share in Britain

Export volumes of Bourgogne white wines in the first nine months of 2023



Making up 76% of exports by volume, Bourgogne white wines largely dominate the English market. Over the first nine months of 2023, this equated to 7.29 million 75cl bottles (down 5.2% compared with the first nine months of 2022), for €89 million (up 3.9% compared with the first nine months 2022).

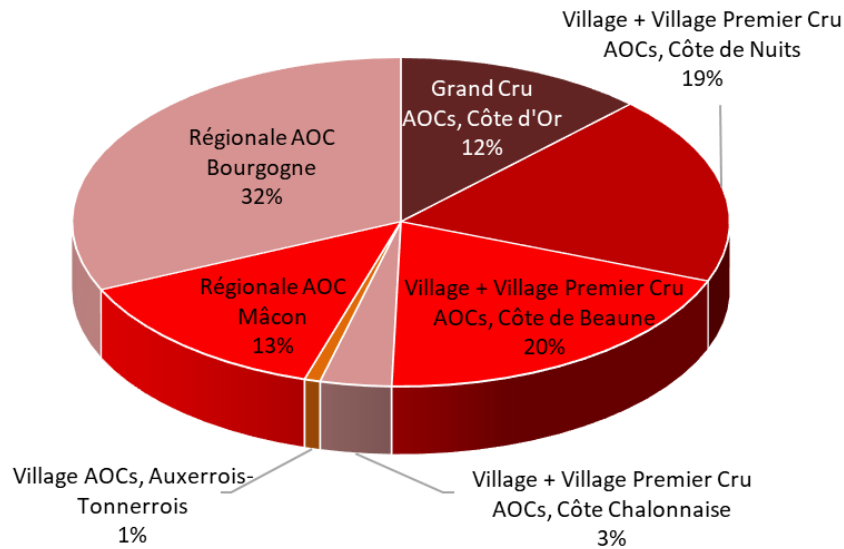
The incredible growth over this period is explained by the strong presence of three groups of appellations:

- ✓ **The Chablis AOCs** rank number one in terms of volume and sales, accounting for 29% of Bourgogne white wine exports for 25% of sales.
The decline in export volumes (down 15% compared with the first nine months 2022) is due to the late arrival of the 2022 vintages. We now need to win back the market share lost following the small 2021 harvest and the move upmarket by Chablis wines.
- ✓ **AOC Mâcon¹** is making a remarkable comeback in this market, with growth on two fronts: Up 12% in volume (the equivalent of nearly 1.7 million 75cl bottles) and an increase of 19.4% in sales (nearly €9.9 million). This puts it in second place in terms of volume, accounting for 24% of Bourgogne white wine exports.
- ✓ **AOC Bourgogne²** accounts for 14% of the volume of Bourgogne white wines exported to this market, and 14% of sales for the period. Although the volume of AOC Bourgogne wines slowed down over the first nine months of 2023, sales are at an all-time high on this market (up 30% compared with the first nine months 2022).

¹The AOC Mâcon includes: Mâcon, Mâcon-Villages and Mâcon plus geographical denominations

²The AOC Bourgogne includes: Bourgogne blanc and Bourgogne plus geographical denominations

Export volumes of Bourgogne red wines in the first nine months of 2023



With 18% of bottles of Bourgogne wine shipped over the first nine months of 2023 (the equivalent of almost 1.7 million 75cl bottles, for €81 million), red Bourgogne wines are close to approaching "pre-Covid" level of exports: Up 13% in volume compared with the first nine-month average for the years 2015-2019). In the process, they exceeded €81 million in sales (an increase of 17% compared with the first nine months of 2022).

Appellations at both ends of the spectrum are showing growth in both volume and sales, and are flying the flag:

- ✓ **AOC Mâcon**³ doubled its export volumes in one year, rising from 6% of export volumes for red wine in 2022 to 13% in 2023 (first nine months). This growth in volume was accompanied by an increase in turnover of €5.7 million, the highest growth in value of any Bourgogne AOC red wine.
- ✓ **Village (including Village Premier Cru) AOCs of the Côte de Nuits** (19% of Bourgogne red wine volumes exported), returned to growth over the first nine months of 2023: Up 14% in volume and with a 15.6% increase in turnover compared to the same period in 2022.
- ✓ **Grand Cru AOCs of both Côte de Beaune and Côte de Nuits** are also among the appellations experiencing growth on two fronts: Up 4.6% in volume and with a 16.9% increase in turnover.

And finally, the **AOC Crémant de Bourgogne** shows continued growth in this market after an excellent year in 2022: Up 43% in volume and 57.7% in value compared with the first nine months of 2022. It thus gains in market share, rising from 4% of exported volumes (in the first nine months of 2022) to 6% for the same period in 2023.

Focus on supermarkets and hypermarkets

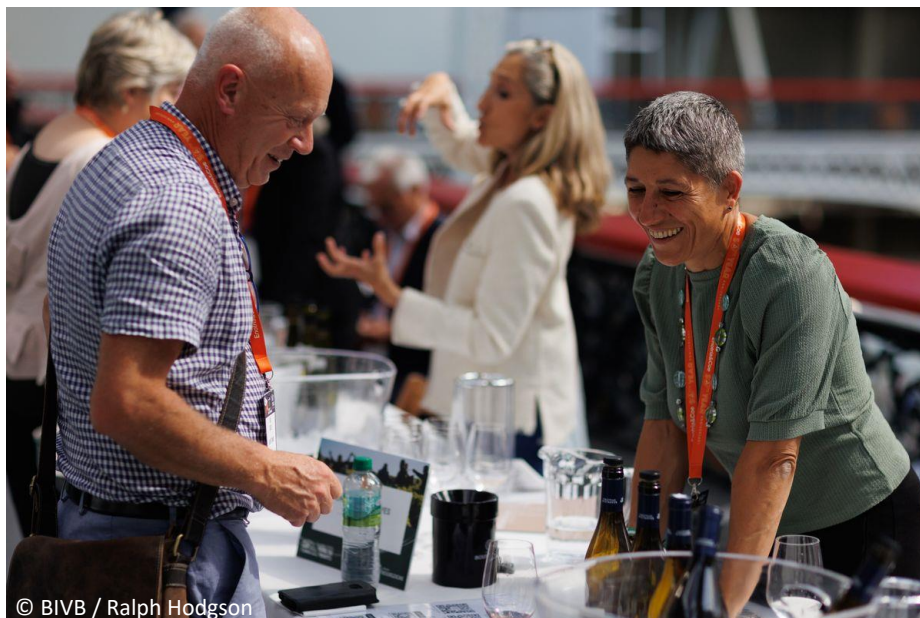
In the first nine months of 2023, Bourgogne sold almost 3.6 million bottles of still wine to supermarkets (down 5.7% compared with the first nine months of 2022), for a turnover of £39.98 million (down 1.6% compared with the first nine months of 2022).

- ✓ Sales of Bourgogne white wines to supermarkets (72% of Bourgogne wine volumes) fell by 4.7% in volume over the first nine months of 2023:
 - **The Chablis AOCs** are on the up again in terms of volume: Up 18.3%, with an increase in turnover of 10.6% compared with the first nine months of 2022. This growth in volume was boosted by the

³ The AOC Mâcon comprises: Mâcon rouge + the geographical denominations of the colour

arrival of the first bottles of the 2022 vintage in the second quarter, at a lower price than the previous year.

- Following their move upmarket, **Mâcon-Villages** are logically experiencing a slowdown in sales: Down 18.6% in volume compared with the first nine months of 2022. They are making good progress in terms of value: Up 6% compared with the first nine months of 2022.
- ✓ Sales of Bourgogne red wines are also slowing down. They now represent 28% of Bourgogne wine volumes sold (1.013 million bottles, down 8% compared with the first nine months of 2022), with a turnover of just under £10 million (up 2.5% compared with the first nine months of 2022).
- ✓ Sales of **Crémant de Bourgogne** followed the same trend in this distribution channel: down 3.4% in volume (265,000 75cl bottles) and with a 68% increase in turnover (£3.13 million). However, the appellation is enjoying a healthy increase in value: up 7.2% compared with the first nine months of 2022).



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Bourgogne wine producers regularly organize tasting for the trade in London
The most important events take place in January, during the Bourgogne Week⁴

Market report written by the Markets and Development Department - BIVB December 2023
(Sources: Customs – CIRCANA&IRI UK – Wine Intelligence - BIVB)

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⁴ The Bourgogne Week is also known to some as “En Primeur”