



BOURGOGNE

Bourgogne Wine Board

Canada: Bourgogne affirms its quest for added value



Key figures: first ten months of 2023 for Bourgogne wines in Canada

The third biggest market in terms of volume for Bourgogne wines

The sixth biggest market in terms of value for Bourgogne wines

Exports: 5.9 million bottles (down 17.5% compared with the first ten months of 2022) for €58 million (down 15.6% compared with the same period in 2022)

| | | |
|-----------------------|-------------------------|-----|
| Made up in volumes of | ▶ Still white wines: | 70% |
| | ▶ Still red wines: | 22% |
| | ▶ Crémant de Bourgogne: | 8% |

According to figures from the *Société des Alcools du Québec* (SAQ Monopoly) for the 12-month period from April 2022 to March 2023, **Quebec alone accounts for nearly 65% of Bourgogne wines exported to Canada!**

In 2023, the Canadian central bank raised interest rates sharply to combat galloping inflation. This put a sharp brake on household consumption and business investment. The Canadian economy grew by less than 1%, without falling into recession.

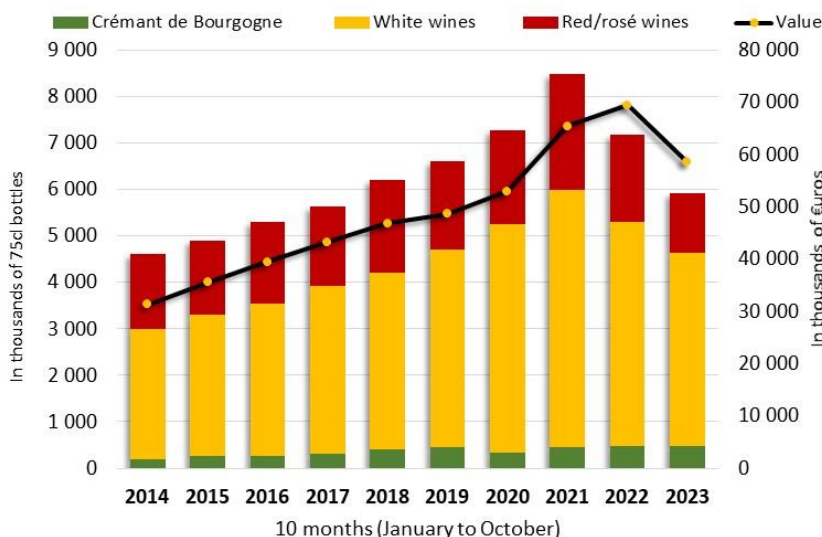
2024 is likely to be a slow year, as the political decisions of 2023 continue to have a strong impact on the Canadian economy, according to Bank of Canada Governor Tiff Macklem.

Bourgogne white wines stongly lead the way in exports to Canada

Exports by French AOC vineyards have been heavily impacted by the country's economic situation: down 17% in terms of volume and down 15% in sales (the first ten months of 2023 compared with the same period in 2022). Bourgogne wines, for once, are no exception, showing a sharp decline over 2023 (down 17.5% in terms of volume and down 15.6% in value over the period).

Exports of Bourgogne wines to the Canada

(source: French customs DEB&EMEBI+DAU / BIVB)



Nevertheless, Canada confirmed its position as the third largest importer (8.2% of wine volumes exported by Bourgogne), a position acquired in 2019 and previously held by Japan. With more than four million bottles exported for almost €37 million, Bourgogne white wines account for 38% of French AOC white wine volumes entering Canada, for 48% of sales.

For more than 20 years, Bourgogne has held on to its number-one position in terms of sales among French AOC wine regions for this colour.

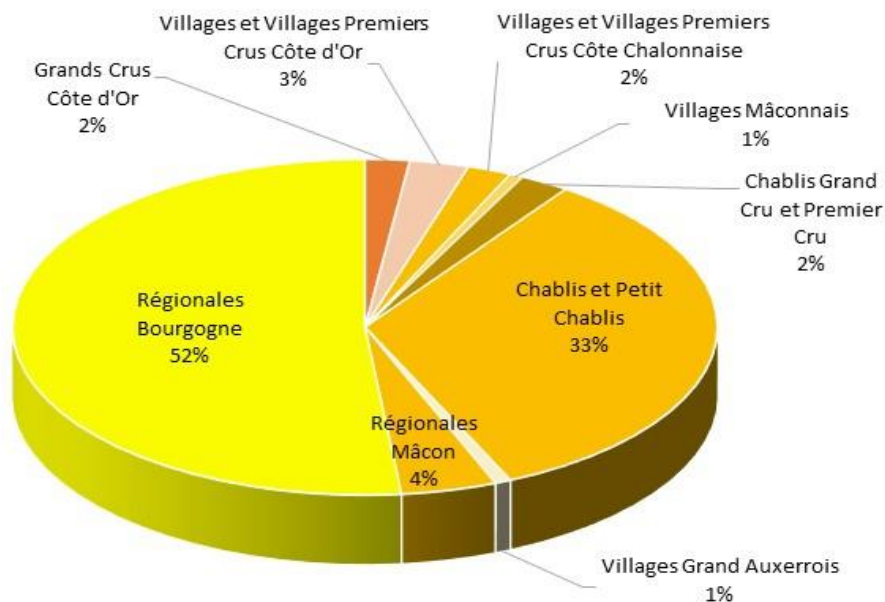
Despite something of a slowdown over the last two years, exports of Bourgogne white wines remain positive compared to the five-year pre-Covid average: up 16% in terms of volume (first 10 months of 2023 compared with the five-year average for the same period 2019-2015), thanks to Chablis wines (up 46% over the period).

After two good years of growth, Crémant de Bourgogne is down slightly in terms of volume (a fall of 1.9%) and sales (down 1.1% over the first ten months of 2023 compared with the same period in 2022). It is the French AOC sparkling appellation (excluding Champagne) that sells the most in this country: 49% in terms of volumes and 52% in turnover for this category (for the first ten months of 2023).

The Régionale appellations dominate the market

Export volumes of white wines to Canada (first ten months of 2023)

White wines account for 71% of Bourgogne wine exports, with a steadily growing market share.

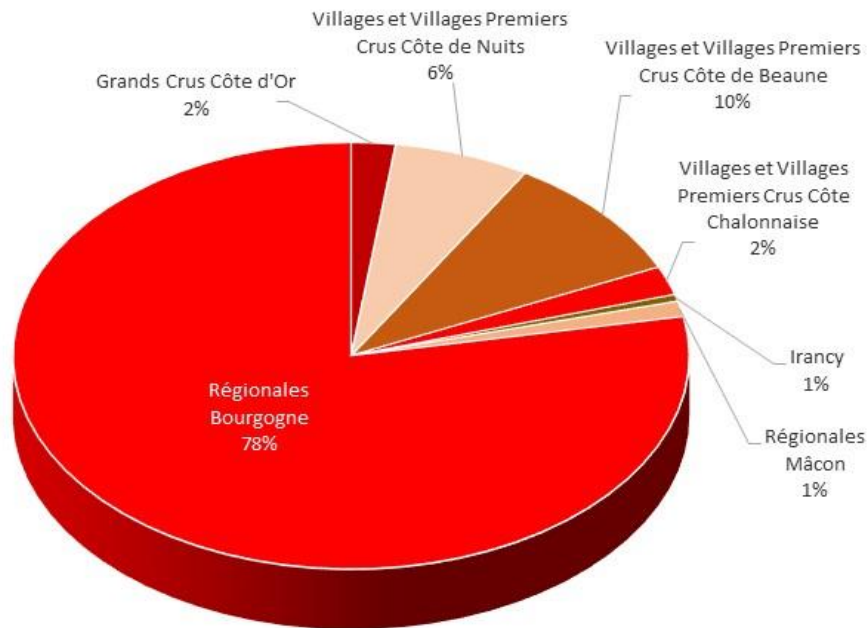


The *Régionale* AOC Bourgogne wines (including Bourgogne plus geographical denomination) account for 52% of white wine export volumes (38% in terms of value), closely followed by the Chablis AOCs (36% in terms of volume for 42% of value).

The *Régionale* AOC Mâcon wines (including Mâcon, Mâcon-Villages and Mâcon plus geographical denomination) are in third place, but a long way behind (4% in terms of volume and 4% in terms of value). Over the first 10 months of 2023, the Chablis and Petit Chablis AOCs were the only to record growth: up 4% in terms of volume (1.4 million bottles) and up 7.3% in terms of value (€13.3 million).

Export volumes of red wines to Canada (first ten months of 2023)

The *Régionale AOC* Bourgogne red wines (including Bourgogne plus geographical denomination) are even more dominant in their colour in terms of volume (78%). They account for 43% in terms of value (over the period). Although their sales are down for the first ten months of 2023, they are well above the pre-Covid average, with growth of 14% (first ten months of 2023 compared with the five-year average for the same period 2019-2015).



The *Village* and *Village Premier Cru* AOCs from the Côte de Nuits are on the up: an increase of 6.7% in terms of volume and 17% in sales (first ten months of 2023 compared with the same period in 2022). They are gaining market share and now account for 6% of volumes and 17% turnover for Bourgogne red wines in Canada.

Curiously, against the backdrop of an economic downturn, the *Grand Cru* AOCs enjoyed a successful year in 2023, with sales up 5% compared with the same period in 2022. They account for 19% of red wine sales.

Quebec on its own is the seventh largest export market for Bourgogne wines!

Quebec is by far the largest market in Canada. The French-speaking province alone imports more Bourgogne wines than Germany or the Netherlands, accounting for nearly 65% of Canada's imports of Bourgogne wines. In the last full SAQ fiscal year available to us (April 2022 to March 2023), Bourgogne sold 4.8 million 75cl bottles in Quebec.

In this SAQ fiscal year, Bourgogne is marking time, after several years of strong growth. However, volumes remain above those marketed before Covid (up 9% over the 12 months to the end of March 2023 compared with the five-year average for 2020-2016). Sales are also higher in terms of value, with a turnover of €132 million (up 30% for the 12 months to end March 2023 compared with the five-year average for 2020-2016). The SAQ sells mostly Bourgogne white wines (71% of Bourgogne volumes). Red wines account for 23% of sales. Crémant de Bourgogne now accounts for 6% of the Bourgogne wine market by volume in Quebec.

- **White wines** (68% in terms of value): badly impacted by the very poor 2021 harvest, white wines are in decline, as we await the very generous and high-quality 2022 vintage.

However, the volumes sold remain well above the pre-Covid period: up 17.7% in terms of volume for the *Régionale AOC* Bourgogne wines (56% of volumes sold); up 18.2% for the Chablis AOCs (28% of volumes) and up 34.3% for the *Régionale AOC* Mâcon (total for the 12 months to end March 2023 compared with the SAQ five-year average for 2020-2016)

- **Red wines** (27% in terms of value): Bourgogne wines experienced their first slowdown in sales this year, after six years of strong growth.
In the colour, the *Régionale AOC* Bourgogne tops all others at the SAQ, with 85% of volumes sold for 62% of turnover!
- **Crémant de Bourgogne** (5% in terms of value): this AOC is reaping the benefits of Quebec's current enthusiasm for sparkling wines, with strong growth in sales (up 3.5%), despite sluggish sales volumes (down 0.06%).

Ontario: sales dominated by white wines

Sales of Bourgogne wines slowed overall in the last fiscal year of the Ontario Monopoly the LCBO (12-month total for April 2022 to March 2023). Slightly less affected, but strongly impacted by the very small 2021 vintage, sales of Bourgogne white wines returned to their pre-Covid level (up 0.1% for the 12 months to the end March 2023 compared with the five-year average for 2020-2016), after two record years.

- All colours combined, 830,300 bottles of Bourgogne wine were sold, for sales of 32.7 million Canadian dollars.
- **White wines** continue to make up the majority, accounting for 57% of Bourgogne's sales (476,000 bottles for 16.9 million Canadian dollars).
Three groups of appellations dominate the market. Chablis wines account for 44% of sales volumes, and the Bourgogne AOC for 30%. Sales of the latter remain 2% higher than the five-year average (total for the 12-months to March 2023 compared with the five-year average for the same period 2020-2016). Finally, the *Bourgogne AOC* wines represent 15% of the Monopole's Bourgogne wine volumes.
- Among the **red wines** (227,000 bottles, or 27% of volumes), the Bourgogne Pinot Noir AOC alone accounts for 83% of volumes sold (189,000 bottles for 5.9 million Canadian dollars).
- After a period of steady growth, sales of **Crémant de Bourgogne** halved in one year, to 127,000 bottles for 2.9 million Canadian dollars. These sales are still 10.5% higher than the five-year average (for the fiscal year April 2022 to March 2023 compared with the five-year average for 2020-2016).

Nearly 640 different Bourgogne wines were sold in the fiscal year under review, but the top 25 accounted for 80% of volumes (15 whites, including seven Chablis, three Crémant de Bourgogne and seven Bourgogne Pinot Noir).

Market report written by the Markets and Development Department - BIVB January 2024

(Sources: Customs DEB&EMEBI+DAU - BIVB – Quebec monopoly SAQ)

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