



BOURGOGNE
Bourgogne Wine Board

*Bourgogne wines are still
a major player in the Japanese market*

2023 key figures for Bourgogne wines in Japan
The 3rd largest market by value and 5th largest by volume

Exports: 6.4 million bottles¹ (-11.4% compared with 2022), **representing 139 million euros** (+1.4% compared with 2022)

of which, by volume

- White wines: 58 %
- Red/rosé wines: 37 %
- Crémant de Bourgogne: 5 %

In 2023, Bourgogne wines accounted for 16% of the volume of French AOC exported to Japan, and 24% of sales.

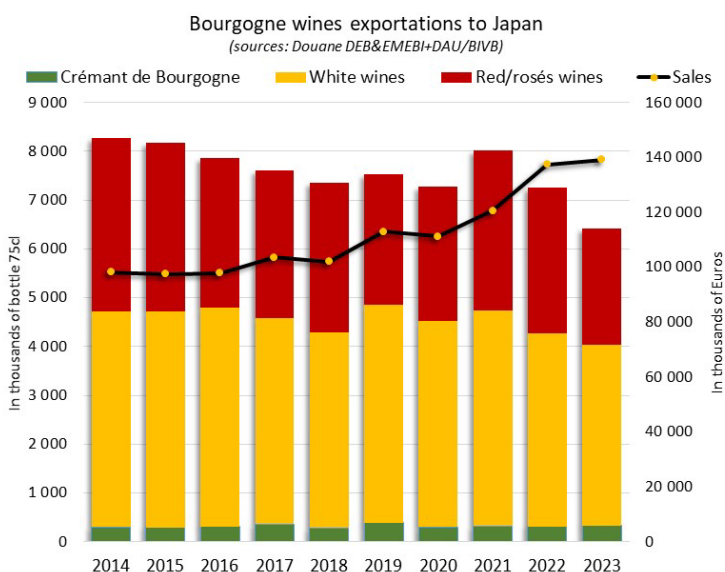
In 2023, Japan lost its position as the world's third-largest economy to Germany. This decline can be explained by a number of factors, such as the fall in the Japanese currency. In particular, it is linked to a demographic decline: the country's population fell by almost a million inhabitants to 125.1 million (2022).

However, the country's growing interest in wine is giving cause for optimism, as the number of regular consumers grew (+5% between 2021 and 2023), fueled by men and the young urban generation.

In terms of sales, Bourgogne was the AOC still wine region with the highest growth in 2023 (+1.86 million euros). In Japan, Bourgogne has a long-standing reputation as a region whose culture, taste and values resonate strongly with the Japanese. Yet professionals in Bourgogne perceive a generational shift that is leading them to increasingly target the under-50s with wines that are more affordable in terms of taste and quality. As a result, the majority of wines shipped are Bourgogne *Régionale* AOCs and Chablis wines.

In 2023, Bourgogne white wines represented 44.5% of the volume of French AOC wines of this color exported to this country, and 68% of their sales.

Bourgogne wines set new sales record



In 2023, Bourgogne attracted ever more Japanese consumers to its best-valued *Régionale* appellations, which explains the stabilization of its sales:

- Sales: up 1.4% compared to 2022 (up 19.1% compared to the 5-year average)
- Export volumes: down 11.4% compared to 2022

Bourgogne whites are the big winners, dominating in terms of volume (58% of exports in 2023), with an increase in sales: up 6.1% in sales compared to 2022 and up 23.9% in sales compared to the average over the last 5 years.

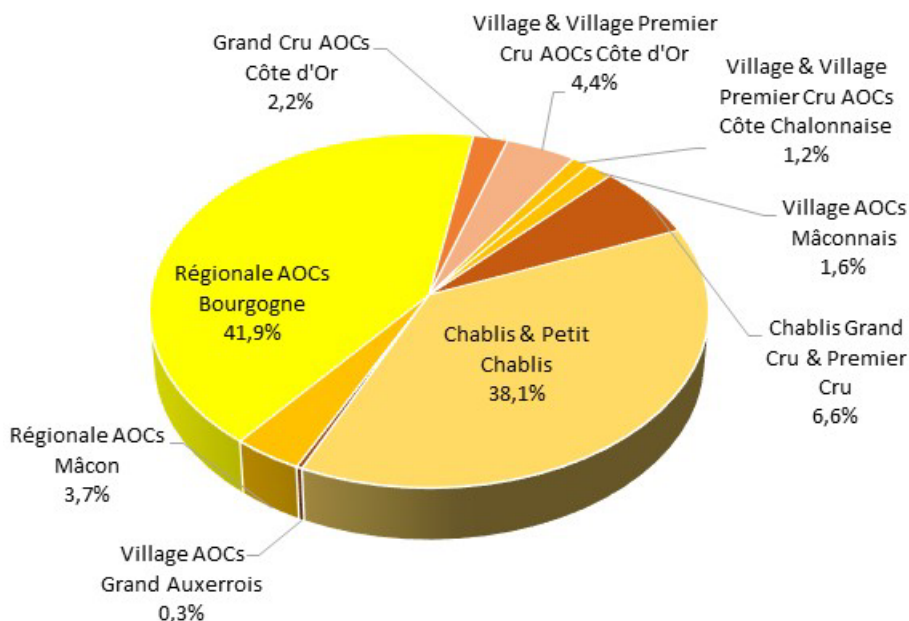
¹ All mentions given in number of bottles correspond to 75 cl equivalents.

Still a relatively low-profile product, Crémant de Bourgogne (5% of Bourgogne's export volume) is now the leading French Crémant export to Japan, both in terms of volume and sales. This appellation offers excellent development potential in a market seeking bubbles with an excellent quality/price/tasting pleasure ratio.

Régionale appellations clearly dominate the Japanese market

Japan is a historic and mature market, importing all categories of Bourgogne wine appellations, although white wines dominate by volume and are approaching the level of red wine sales with each passing year.

2023 export volumes for white wines



Bourgogne whites have historically played an important role in this market, accounting for between 54% and 60% of export volumes over the past 10 years (58% in 2023).

Bourgogne's *Régionale* AOCs² account for 42% of volumes in this category. After a very good year of growth in 2022, these wines stabilized in 2023 at 1.55 million bottles exported. Despite a drop in volumes in 2023, these AOCs remain above the average export volumes of the last 5 years (+1.2%). Their sales demonstrate their quest for added value: up by 7.8% compared to 2022 (and up by 45.4% compared to the 5-year average).

All Chablis appellations together also play an important role driving the market for Bourgogne white wines (nearly 45% of exported white volumes). From 2018 to 2021, Chablis wines enjoyed real growth in Japan, slowed in 2022 by low availability of the 2021 vintage.

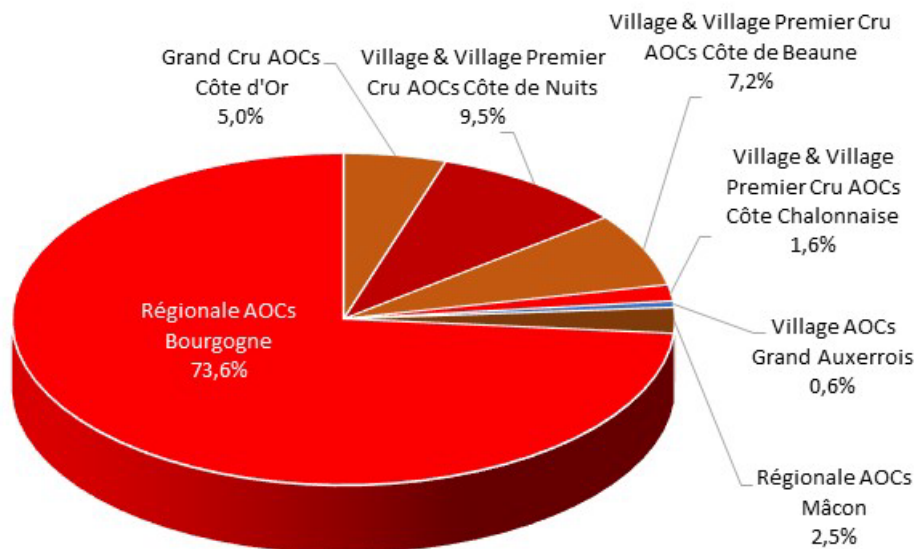
With the bumper harvest of 2022, exports of Chablis wines to this market have picked up again:

- Up 6.7% by volume for AOC Chablis and Petit Chablis, generating sales of 1.275 million euros
- Up 0.9% for the Chablis Grand Cru and Chablis Premier Cru AOCs, with sales exceeding 4 million euros (up 11.9% compared with 2022).

According to a 2023 study by Wine Intelligence, Chablis wines rank 9th among the most purchased wines in Japan. This comes as no surprise in a country that appreciates Chardonnay, the leading white grape variety, and which places Bourgogne in 3rd position in this ranking.

² Bourgogne *Régionale* AOCs: Bourgogne, Bourgogne plus geographical indication, Bourgogne Aligoté

2023 export volumes for red wines



In 2023, Bourgogne red wines represented 37% of Bourgogne volumes exported to Japan, accounting for 52% of sales. As with white wines, more and more Japanese consumers are opting for Bourgogne's best-valued *Régionale* appellations, which is driving revenue growth faster than sales volumes for a number of AOCs.

The majority of volumes were generated by the Bourgogne red Régionale appellations, which accounted for 74% of volumes (1.7 million bottles) in 2023, as well as 55% of sales (an increase of 3.6 million euros, or 39.6 million euros in sales).

Other, lesser-known AOCs in red, including Mâcon³ and Village AOCs from the Grand Auxerrois also contributed to growth, with respective leaps of up 36.3% and up 79.3% by value (2023 compared to 2022), reaching almost 2.7 million euros in sales for almost 100,000 bottles.

Economic report written by the Markets and Development Unit - BIVB - April 2024
 (Sources: Customs DEB & EMEBI + DAU - Wine Intelligence - BIVB)

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³ Mâcon Régionale AOCs in red: Mâcon, Mâcon plus geographical designation