

## Sweden: Record sales for Crémant de Bourgogne despite a softening market



### 2023 key figures for Bourgogne wines in Sweden

10<sup>th</sup> largest market for Bourgogne wines by value

6<sup>th</sup> largest market for Bourgogne wines by volume

**5.27 million bottles<sup>1</sup> (-10.7% / 2022), generating 37.8 million euros (-8.4% / 2022)**

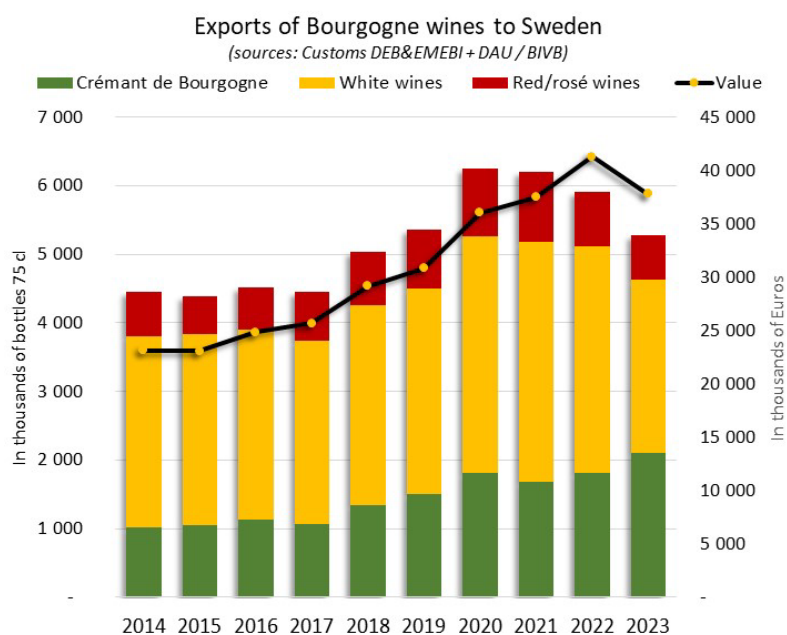
Of which by volume → White wine: 48 %  
→ Red wine: 12 %  
→ Crémant de Bourgogne: 40 %

**In 2023, Bourgogne wines accounted for 24% of the volume of French AOC wines exported to Sweden, and represented 22% of sales.**

Although Bourgogne vineyards account for only 4% of French AOC wine production, they are France's leading exporter of AOC wines to Sweden (24% of the total). Sweden is currently the 6<sup>th</sup> largest importer of Bourgogne wine by volume.

Sales of Bourgogne white wines dominate this market. They represent 38% of the volume of French white wine appellations exported to Sweden in 2023. Over the past twenty years, the development of Bourgogne wine exports has focused mainly on this color. Over the same period, Crémant de Bourgogne has performed exceptionally well, becoming the leading AOC export.

### A market driven by white wines and Crémant de Bourgogne



Between 2017 and 2021, Bourgogne made significant progress in Sweden in terms of both volume and sales. It was even the leading French AOC wine-growing region in terms of growth on this market between 2020 and 2019 (gaining 68% in volume and 58% in sales among French AOC vineyards).

Exports in 2022 were affected by the lack of availability due to the small harvest in 2021. In contrast, Bourgogne wine sales set a record, exceeding 40 million euros and ranking first among French AOC still wines.

The return of Bourgogne wines to this market is taking slightly longer than expected. It is still down 8.3% by volume

<sup>1</sup> All references to bottles in this document refer to 75 cl bottles.

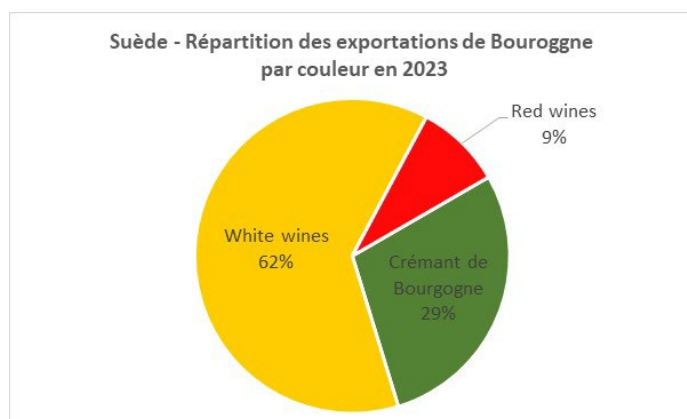
(2023 compared to the average of the last 5 years), but total volume is on par with 2019 (pre-Covid). Only Crémant de Bourgogne is experiencing double-digit growth (by volume and sales).

Although sales fell in 2023 (- 8.4%, 2023 compared to 2022), they remained well above the average of the last 5 years (+ 8.1% in 2023 compared to the 5-year average). This is the second-best result in Bourgogne, at over 37.8 million euros.

Monopoly sales represented 81.5% of Bourgogne wine imports to Sweden in 2023. The difference can be allocated to the hotel-restaurant circuit. This would represent around 700,000 to 800,000 bottles each year, but we do not have specific details.

## Crémant de Bourgogne excels in Sweden, just behind white wines

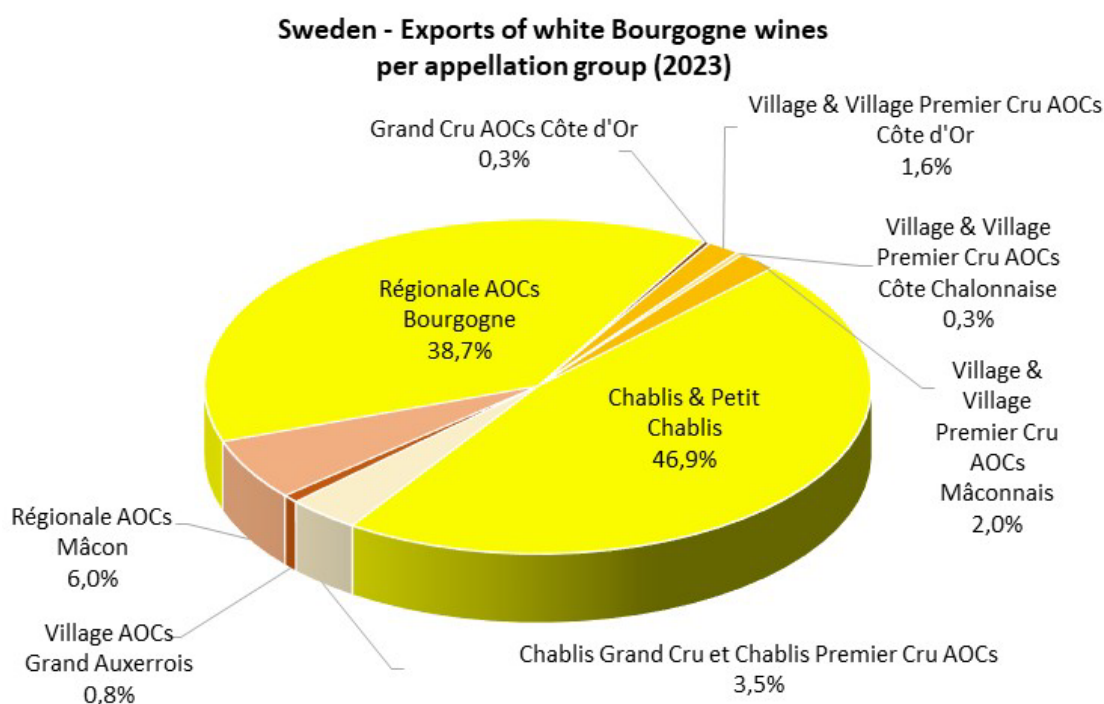
Sweden is the second largest export market for Crémant de Bourgogne in terms of volume and sales. Crémant now represents 40% of Bourgogne wine exports, while accounting for just 11% of the total vineyard production.



In 2023, Crémant de Bourgogne broke two new records, further securing its near-leading position: over 2.1 million bottles for sales of 11.2 million euros.

For over 20 years, this AOC has been steadily progressing. In 2023, it was the best-placed French sparkling AOC in terms of gains in volume and value, accounting for 32% of the category's exported volumes (up 16.5% compared to 2022) and 14% of sales (up 17.8% compared to 2022).

In comparison, **Bourgogne white wines**, although still leading in Sweden, are somewhat lagging due to shortages following the small 2021 vintage.

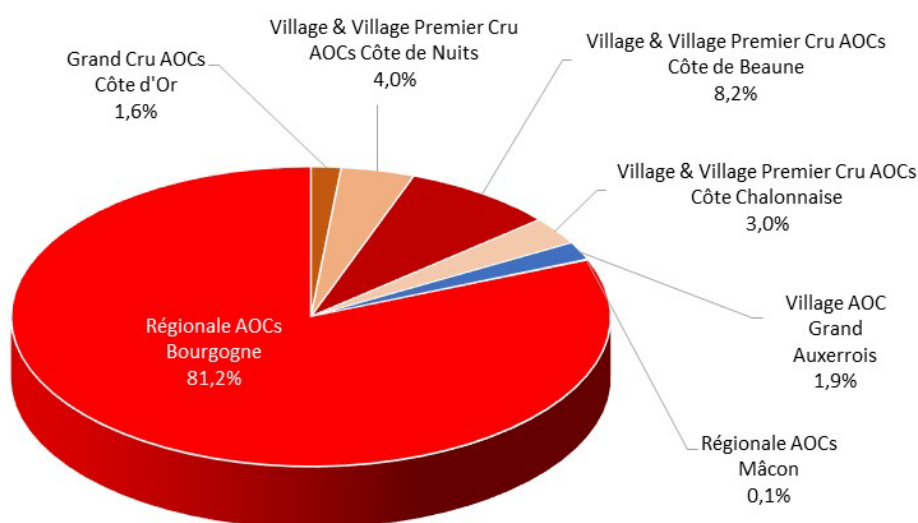


In 2023, they accounted for 48% of export volumes (-24.1% / 2022) and 50% of sales (-20.3% / 2022), reaching over 2.5 million bottles and 19 million euros. The superb 2022 and 2023 vintages have greatly appealed to trade professionals, particularly during the Grands Jours de Bourgogne, and should rapidly allow the color to rebound.

- Chablis AOCs continue to dominate by volume (50% of Bourgogne white wines), with sales of 9.6 million euros. After returning to pre-Covid volumes in 2022, the return of Chablis wines to this market was more sluggish than expected in 2023: -23.5% by volume and -21.3% by sales compared to 2022.
- Bourgogne *Régionale* AOCs in white (including Bourgogne plus geographical denomination) were also somewhat slow to regain market share in 2023: down 24.4% by volume compared to 2022 (966,930 bottles for 5.38 million euros in sales).

Less common, Bourgogne red wines represent 12% of volumes and 20% of sales for Bourgogne in Sweden. From 2016 to 2021, this category enjoyed strong growth, before being slowed down significantly by the lack of availability due to the loss of volume in the 2021 vintage, which continued to be felt for much of 2023: down 16.7% by volume and -4.2% in sales (2023 compared to 2022).

**Sweden - Exports of red Bourgogne wines  
per appellation group (2023)**



- Bourgogne *Régionale* AOCs in red (including Bourgogne plus geographical indication<sup>2</sup>) are by far the most exported (81% of Bourgogne red wine volumes). After record volumes in 2020 and 2021, these AOCs experienced a decline in 2023 (-18% by volume compared to 2022). Sales are also down, by -13.4% compared to 2022.
- The Village and Village Premier Crus of the Côte d'Or, the second largest group of AOCs by volume, accounted for 12% of exported red wine volumes. After a record year in 2022, these AOCs exported 79,440 bottles in 2023. This was the 3<sup>rd</sup> consecutive record year in terms of volume for this category. It generated sales of just over 2 million euros (2<sup>nd</sup> consecutive record year).

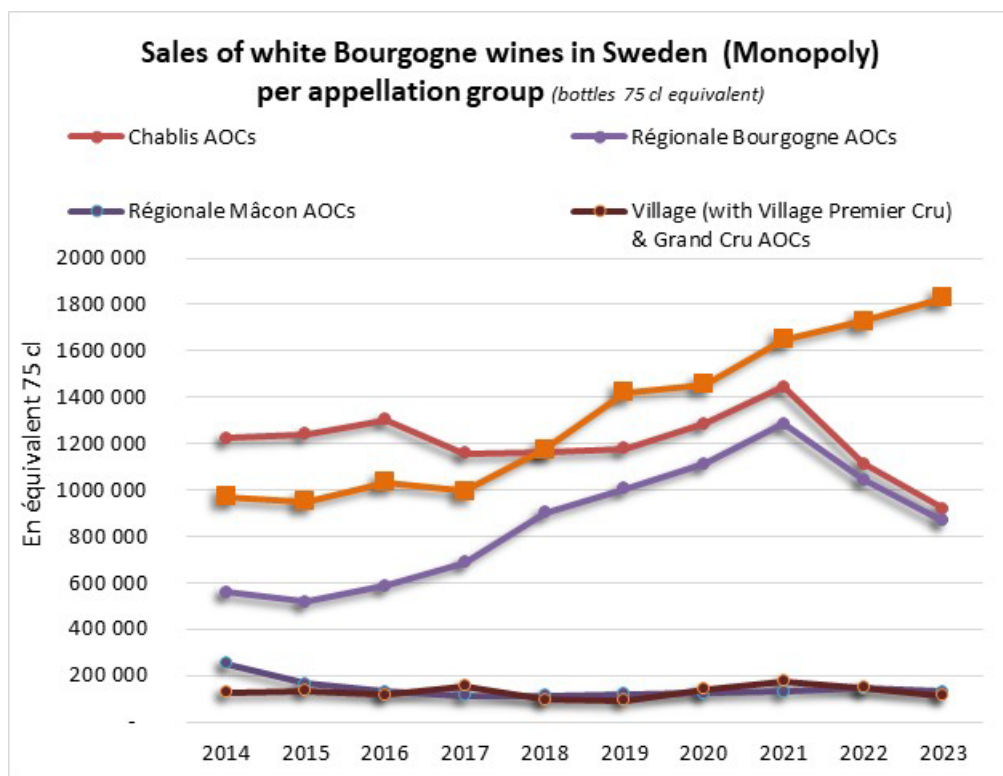
<sup>2</sup> There are 13 different geographical indications for Bourgogne: Bourgogne Chitry / Bourgogne Côtes d'Auxerre / Bourgogne Côte Chalonnaise / Bourgogne Côtes du Couchois / Bourgogne Côte d'Or / Bourgogne Côte Saint-Jacques / Bourgogne Coulanges-la-Vineuse / Bourgogne Épineuil / Bourgogne Hautes Côtes de Beaune / Bourgogne Hautes Côtes de Nuits / Bourgogne La Chapelle Notre Dame / Bourgogne Montre-cul or Montrecul or En Montre-Cul / Bourgogne Tonnerre

## Focus on the sales of Bourgogne wines by the Swedish Monopoly in 2023

Sales of Bourgogne wines at the Monopoly (Systembolaget) returned to normal levels, in line with pre-Covid years: +4.6% (2023 / 2019, equal to 718 million SEK) thanks to growth in sales of Crémant de Bourgogne and *Régionale Mâcon* AOCs.<sup>3</sup>

With 4.324 million bottles in 2023, the Monopoly accounted for approximately 81.5% of the volume of Bourgogne wines shipped to Sweden.<sup>4</sup>

- ✓ Crémant de Bourgogne represented 42.3% of the volumes sold by Bourgogne at the Systembolaget in 2023, establishing two new records: 1.830 million bottles and 270.3 million SEK in sales, which represented increases of 5.8% and 12.8% respectively compared to 2022.
- ✓ The white Mâcon *Régionale* AOCs enjoyed their 2<sup>nd</sup> best year ever by volume, totaling 131,764 bottles (up 3.5% compared to the 5-year average), generating record sales of 18.3 million SEK (up 5.4% in 2023 compared to 2022).



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(Sources : Douanes DEB&EMEBI+DAU - Wine Intelligence - BIVB)

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<sup>3</sup> Mâcon, Mâcon-Villages and the 27 Mâcon plus geographical denomination (e.g. Mâcon-Lugny, Mâcon-Pierreclos, Mâcon-Péronne, Mâcon-Chardonnay, Mâcon-La Roche-Vineuse, etc.)

<sup>4</sup> Figures for the hotel and restaurant sector are not available.