

Norway: Bourgogne's 7th largest export market

2023 key figures for Bourgogne wines in Norway

Annual sales figures of the Vinmonopolet monopoly¹

4.44 million bottles (-1.2% / 2022), for 1.150 billion NOK (+8.1% / 2022)

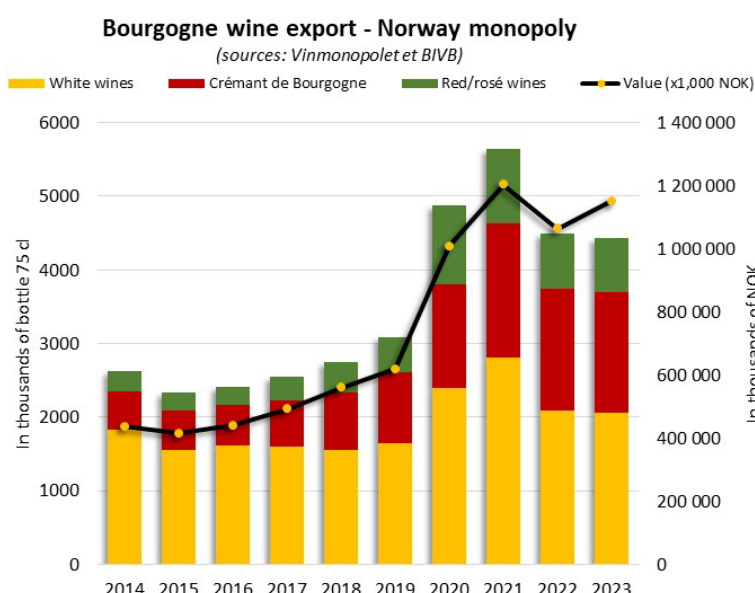
of which by volume → White wine: 46 %
→ Red wine: 17 %
→ Crémant de Bourgogne: 37 %

11 Bourgogne wine references feature in the top 50 French wines sold in 2023 (51% of the monopoly's French wine volume): 1 Chablis, 1 Petit Chablis, 2 Bourgogne in white, 1 Coteaux Bourguignons in red, and 6 Crémant de Bourgogne.

Until 2019, Norway's overall wine imports were relatively stable. In 2020 and 2021, due to border closures during the health crisis, Norwegians were deprived of access to Swedish markets or duty-free sales. As a result, the direct import flows of wine into this market increased considerably. The monopoly also benefited from the closure of the restaurant sector.

In 2023, a new sales record was set by the monopoly (5.54 billion NOK, or approximately 47.4 million euros) despite a decline in import volumes. However, this volume is still high, well above pre-Covid volumes (91.6 million liters, or more than 122.1 million bottles).²

A stable market with potential for Bourgogne wines



Vinmonopolet accounts for the bulk of Bourgogne wine sales in the country, with the remainder generated by the restaurant sector.

After two exceptional years due to the consequences of the pandemic (see above), the volume of Bourgogne wines sold by the monopoly was stable in 2023 compared to 2022. However, they are still significantly higher than in previous years:

- ▶ 4.44 million bottles (+44% / 2019)
- ▶ 1.15 billion NOK in sales (nearly 98.4 million euros), an increase of 8.1% compared to 2022 (+86% / 2019).

¹ Only the monopoly's data is taken into account here. Any private imports are not known, and customs volumes do not take into account volumes imported into Norway via European intermediaries.

² All references to bottles in this document refer to 75 cl bottles (we convert volumes into bottle 75cl equivalents).

This is a sizeable volume when compared to the population: 4.5 million people aged 16 and over, which equates to one bottle of Bourgogne wine per adult inhabitant per year!

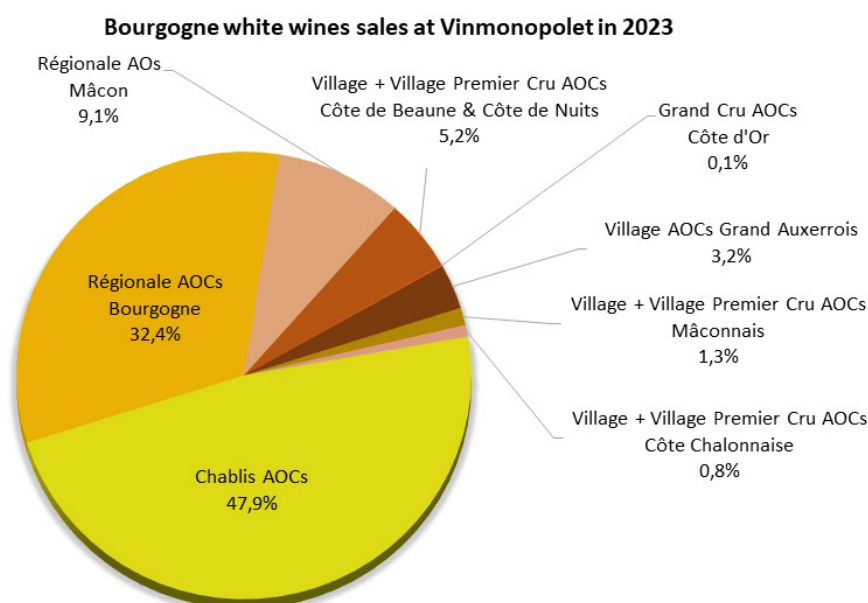
Contrary to market trends, "bottle" packaging accounts for a clear majority of sales of still Bourgogne wines. In fact, it accounts for 79% of volumes exported by the vineyard (up 2% / 2022).

The Bag-In-Box format mainly concerns a few white wine references (Petit Chablis, Chablis and Bourgogne blanc).

The Bourgogne wine market dominated by sales of white wines

As in many countries, white wines are highly popular in Norway, and in 2023 they represented almost half of Vinmonopolet sales (47%).

- Chablis AOCs account for almost half of the Bourgogne wine sales, representing 48% of white Bourgogne wines by volume. After a strong increase during the pandemic, they are returning to their 2018 and 2019 levels, with sales remaining slow in 2023 (-10% / 2022).
- Sales of *Régionale* Bourgogne AOC³ whites continue to grow (+ 29% / 2022).
- In contrast, *Régionale* Mâcon AOCs⁴ have not managed to establish themselves durably in this market (down 18% / 2022, with a sharp drop in sales of Mâcon-Villages).



Crémant de Bourgogne performs well in this market, as it does in neighboring Sweden, capturing 37% of Bourgogne wine sales (1.63 million bottles), even though it accounts for only 11% of Bourgogne wine production.

Above all, this AOC has become Vinmonopolet's best-selling sparkling wine, behind Prosecco (1.8 million bottles). In fact, 9 of the top 25 Bourgogne wines sold by the monopoly (regardless of packaging) are Crémant de Bourgogne.

³ This includes Bourgogne plus a geographical indication, such as Bourgogne Côte d'Or, Bourgogne Tonnerre, Bourgogne Côte Chalonnaise, etc.

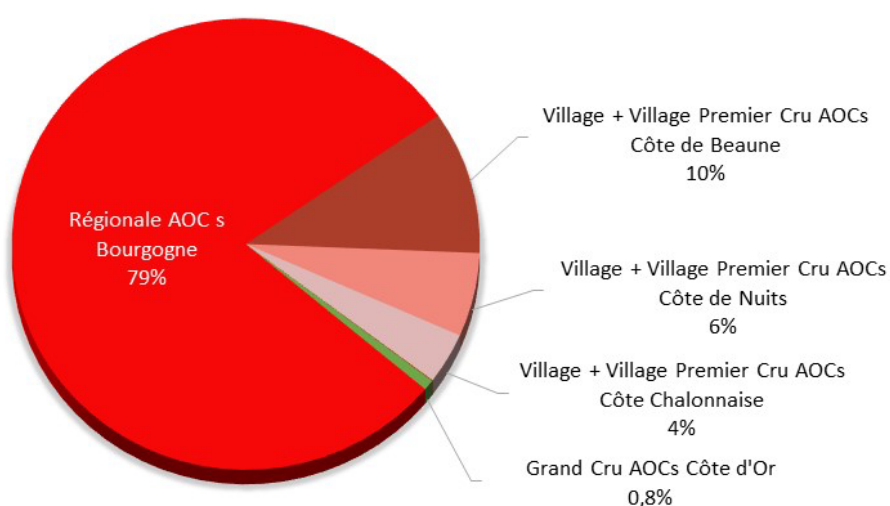
⁴ Mâcon, Mâcon-Villages and the 27 Mâcon plus geographical indications

Overall, the pandemic has accelerated sales of Bourgogne red wine in Norway (+60% 2023 / 2019). Despite a decline in 2022, volumes marketed by the monopoly remain much higher than those of 2019 and previous years.

Red wine exports even showed a slight increase in 2023 (+1% / 2022), thanks in particular to a sharp rise in sales of Bourgogne Pinot Noir AOC and Coteaux Bourguignons AOC.

- Bourgogne *Régionale* AOCs still account for the bulk of the vineyards' sales for this color (79% of volumes).
- The Village and Village Premier Cru AOCs of the Côte de Beaune (10% of Bourgogne red wine volumes) are progressing very well with sales up 17% by volume compared to 2022.)

Bourgogne white wines sales at Vinmonopolet in 2023



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(Sources: Vinmonopolet and the BIVB)

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