



Bourgogne wines' #1 Export Market



2024 Key Figures for Bourgogne Wines in the United States

The number one export market by volume and value

Exports: 20.9 million bottles, an increase of 15.9% compared to 2023, generating 369.6 million euros in revenue, up 26.2% compared to 2023.

Breakdown by volume	→ Still white wines:	63%
	→ Still red & rosé wines:	26%
	→ Crémant de Bourgogne:	11%

In 2024, Bourgogne wines accounted for 12% of the volume of French AOC wines exported to the United States, representing 17.2% of the revenue.

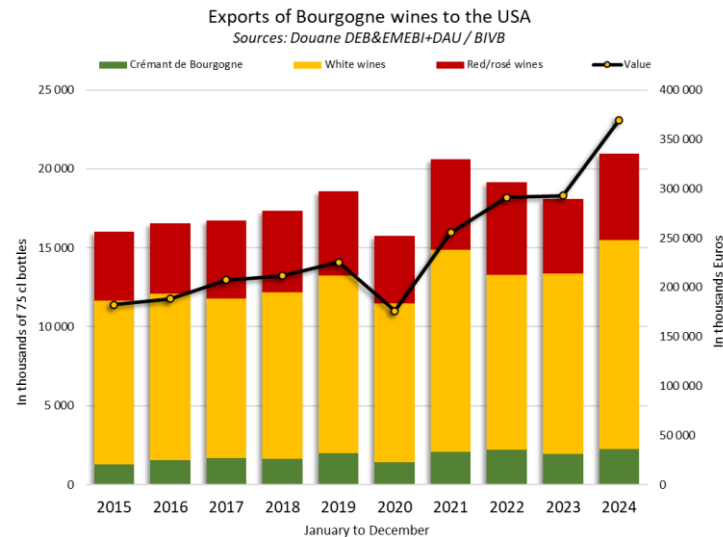
Bourgogne white wines made up 36.3% of the volume of French AOC white wines exported.

U.S. wine consumption in 2022 was estimated at over 351 million cases of 12 bottles (9 liters), accounting for 10% of all alcoholic beverages consumed. Projections for 2027 indicate an overall decline of 2.3% in wine consumption (IWSR 2024). However, consumption of wines of French origin is expected to continue growing, with a forecasted increase of 1.6% between 2022 and 2027.

In this context, Bourgogne wines are finding new avenues for growth, as demonstrated by their strong performance in 2024. However, these gains should be viewed with some caution, as they may be partially influenced by anticipatory imports in response to potential tariff increases.

Two New Records Confirm This Market's Strong Appetite for Bourgogne Wines

After an exceptional year in 2021, followed by two calmer years of market adjustment, 2024 has reached new records.



First, in revenue: up 26.2% compared to 2023, with figures nearly doubling the five-year average (+49%). All wine categories have benefited.

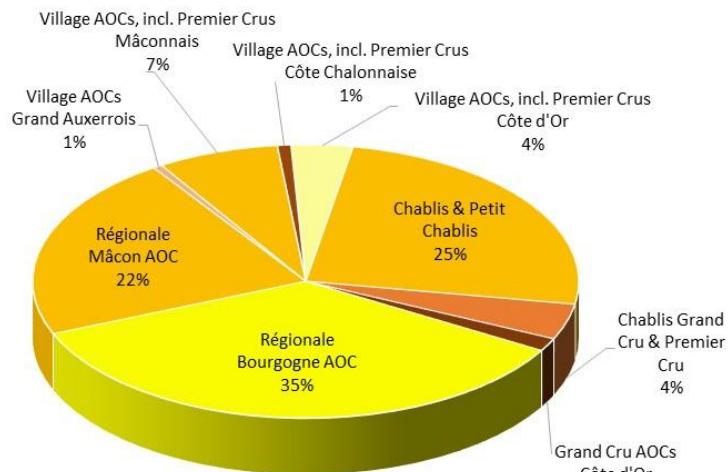
Second, in export volumes, which have surpassed the previous record set in 2021, exceeding 20.9 million bottles (+15.9% compared to 2023). Bourgogne white wines, in particular, have broken their own 2021 record, with an additional 4% in volume.

The United States alone accounted for 23.5% of total revenue and 21.8% of Bourgogne wine exports worldwide in 2024!

Régionale AOCs Remain in the Lead, Accounting for 66% of Exported Volumes

Bourgogne white wine exports to the U.S. (2024 volumes)

In 2024, Bourgogne white wines accounted for 63% of the total exported volume to the United States, representing 53% of the revenue (+25.3% compared to 2023).



✓ The **Bourgogne AOC¹** is gradually gaining market share, with 35% of the white wine volume and 37% of the value (5-year average: 33% in volume and 34% in value). This growth is evident in their performance: +31.9% in volume and +53.1% in value compared to 2023.

✓ The **Chablis AOCs**, with 29% of the total white wine export volume, take second place (24% of the value of this category). Informed American consumers are increasingly favoring authentic French Chablis, which strengthens their position in the U.S. market. The U.S. has now become the leading export market for Chablis wines. This trend

was confirmed in 2024, as Chablis and Petit Chablis volumes grew by +32.9% and revenue by +28.4% compared to 2023 (a gain of +7.9 million euros, bringing total revenue to 36 million euros).

✓ The **Mâcon AOC²** follows, accounting for 22% of the volume (10% of the value). After a strong rebound in 2023, these wines solidified their return to the U.S. market with +2.4% in volume compared to 2023. They also showed a significant increase in revenue, rising by 5.5% compared to 2023 (a gain of 1 million euros, reaching 19.4 million euros).

Crémant de Bourgogne represented 11% of the exported volumes, contributing just over 4% of the total revenue from Bourgogne wines in the U.S. With a market share of 31.6% in volume (up from 27% in 2019) and 37% in revenue (up from 33% in 2019), Crémant de Bourgogne maintains its position as the leading French sparkling wine AOC, excluding Champagne, exported to the U.S.

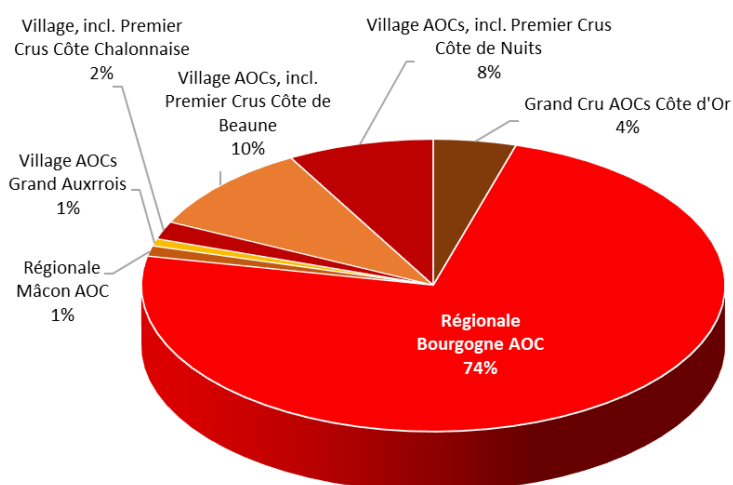
It continues to grow in volume: +14% in volume and +15.9% in revenue compared to 2023.

Bourgogne red wine exports to the U.S. (2024 volumes)

In 2024, red wines, which are relatively well-priced, accounted for 26% of the total volume (+15.6% compared to 2023), representing 43% of the revenue from Bourgogne wines in the United States (+28.4% compared to 2023).

The market is largely dominated by two groups of appellations:

✓ **Bourgogne AOC³** makes up the vast majority, representing 73% of the red wine volumes from Bourgogne and 49% of the value. After two years of volume decline, they flourished in 2024: +24.5% in volume and +65.7% in revenue compared to 2023.



¹ The Bourgogne AOC white wines include: Bourgogne and Bourgogne followed by a geographical denomination, available in white

² The Mâcon AOC white wines include: Mâcon, Mâcon-Villages and Mâcon followed by a geographical denomination, available in white

³ The Bourgogne AOC red wines include: Bourgogne, and Bourgogne followed by a geographical denomination, available in red

✓ **Village and Village Premier Cru AOCs from the Côte de Beaune and Côte de Nuits** follow, accounting for 18% of the volume and 26% of the value of red wines in this market. The revenue in 2024 was very close to the record set in 2022 (€41.7 million) and continues to grow: +7.2% compared to 2023. Conversely, the export volume saw a second consecutive year of decline: -5.5% compared to 2023. This decline particularly affected Village and Village Premier Cru AOCs from the Côte de Beaune.

Bourgogne in Line with the Evolution of the U.S. Market

In 2024, the On-Trade market (restaurants, bars, hotels) continued its recovery after being deeply impacted by the COVID pandemic, accounting for approximately 15-20% of total wine sales in the country.

- ✓ Bourgogne, thanks to its strong appeal, contributed to this rebound: the growth in wine purchases in restaurants and wine bars was primarily concentrated in the price segments where Bourgogne wines have the strongest presence (Ultra-premium to Prestige). These valuation segments represented more than 25% of wine purchases in 2023, compared to 17% in 2019.
- ✓ *Régionale* AOCs, which serve as the entry point to Bourgogne, continued to attract new consumers (+15% in volume, January–November 2024 vs. January–November 2023), particularly among Millennials. This generation was the only one to increase its wine purchasing volume.

The Off-Trade market remained dominant in the country (80-85% of volumes), but it no longer showed the same momentum since COVID-related restrictions were lifted. Only more traditional wine retail outlets (liquor stores, super stores, and wine shops) saw higher foot traffic in 2023 compared to 2019. This level of traffic partly explains the +11.4% growth in Bourgogne wine exports to the U.S., as Bourgogne is primarily distributed through these channels.

Bourgogne wines are available for sale in most U.S. states. However, the majority of Bourgogne wine sales were concentrated in the six states that account for half of the country's total wine consumption: California, Florida, New York, Texas, New Jersey, and Illinois.

New York State, home to the country's most populous city, has a strong gastronomic culture. Naturally, Bourgogne wines hold a privileged position in this market. As of July 2024, Bourgogne had the most extensive selection among French wines, representing 25% of all French wine listings (source: online data, July 2024).

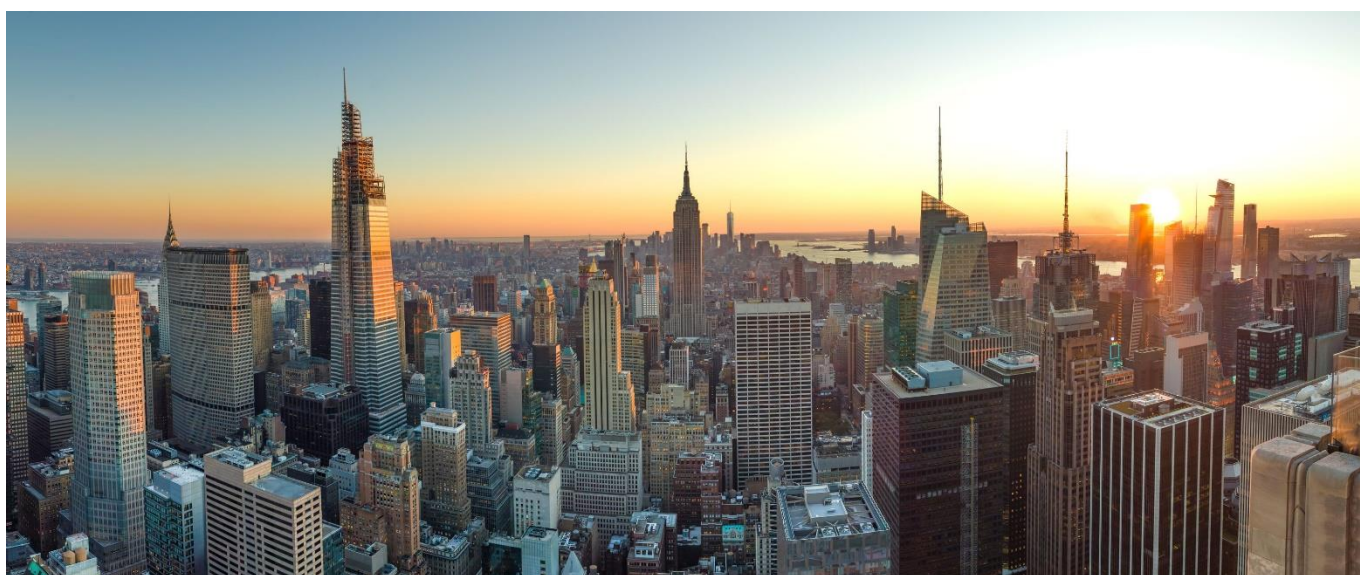
- ✓ Bourgogne white wines, leading the category, accounted for 46% of the French wine selection. As of July 2024, the most represented wines were: AOCs from the Côte de Beaune (32% of Bourgogne wines), Chablis wines (23%), and Bourgogne AOC (15%).
- ✓ Bourgogne red wines, ranking second behind Bordeaux, made up 25% of the French wine selection. The most represented wines as of July 2024 were: Côte d'Or AOCs (59% of Bourgogne wines) and Grand Cru wines (25%).
- ✓ Crémant de Bourgogne, in third place, accounted for 18% of French AOC sparkling wines (excluding Champagne).

Located in the Midwest, **Illinois is internationally recognized for the city of Chicago**. As the third-largest city in the United States, Chicago is considered the country's cultural hub and home to many major corporations. This results in a high-level culinary, artistic, and cultural scene where Bourgogne wines naturally fit in.

As of July 2024, Bourgogne ranked as the second most represented foreign wine region in Illinois (excluding U.S. wines), accounting for 13% of the total wine listings online.

It also stood as one of the most widely available French wine regions, representing 21% of all French wines listed online in July 2024.

- ✓ Bourgogne white wines, leading the category, accounted for 41% of the French wine selection. As of July 2024, the most represented wines were: AOCs from the Côte de Beaune (34% of Bourgogne wines), Chablis wines (25%), and Bourgogne AOC (13%).
- ✓ Bourgogne red wines, ranking second behind Bordeaux, accounted for 22% of the French wine selection. The most represented wines as of July 2024 were: Côte de Nuits AOCs (37% of Bourgogne wines), Grand Cru wines (29%), and Côte de Beaune AOCs (23%).
- ✓ Crémant de Bourgogne, in fourth place, accounted for 17.5% of French AOC sparkling wines (excluding Champagne).



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(sources: Douane DEB&EMEBI+DAU - IWSR – Wine Market Council – Ministry of Agriculture and Food Sovereignty – Wine Searcher - BIVB)

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