BOURGOGNE
Bourgogne Wine Board

Australia: New Opportunities Emerging for Bourgogne Wines

Key figures for Bourgogne wines in Australia (2025)

14th largest export market by volume and
17th largest export market by value for Bourgogne wines

Exports: 1.68 million bottles (+9.2% vs. 2024) for €28.94 million (+2.6% vs. 2024)

of total export volume
- → Still white wines: 69%
- → Still red and rosé wines: 22%
- → Crémant de Bourgogne: 9%

In 2025, Bourgogne wines accounted for 19% of the volume of French AOC wines exported to Australia, representing 23% of revenue. Bourgogne white wines clearly dominated the category, representing 49% of all French AOC white wines exported to the market.

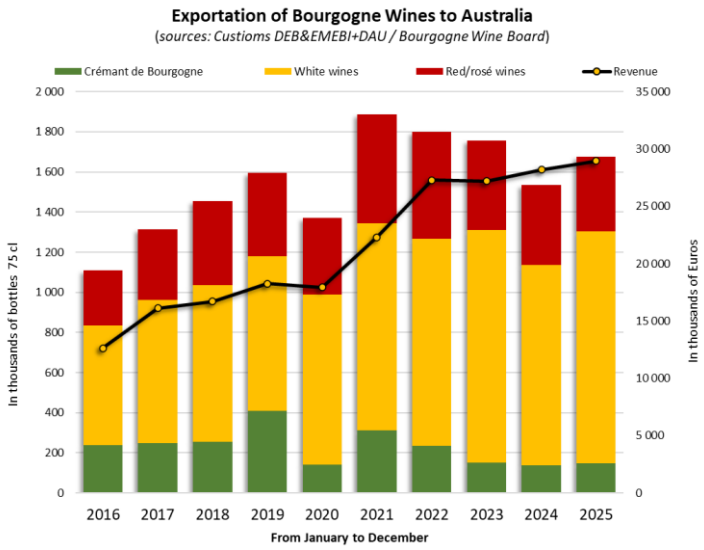
In 2025, Australia counted 9.4 million regular wine drinkers[1] (+0.3 million compared to 2019) out of 21.4 million adults (IWSR).

Wine represented 18% of alcohol purchased, far behind beer (62%). Consumption has been declining by around 3% per year, while cocktails and ready-to-drink spirits are expanding quickly (+4% annually) and now represent 13% of alcohol volume.

Between 2019 and 2024, purchases of still wine fell1 6% in volume, with no clear sign of recovery in the short term. Sparkling wines performed somewhat better over the same period, although they also slowed in 2024. Domestic wines continued to dominate the market, accounting for 77% of purchases. French wines remained the most recognized imported wines (69% awareness), but their purchase rate remained comparatively modest (23%).

The Leading Bourgogne Market in Oceania

Australia was a very small market for Bourgogne wines in the early 2000s, but it has grown steadily over the past two decades despite annual fluctuations.



After the exceptional surge in 2021 linked to lockdown consumption, exports returned to levels closer to those seen before Covid, while still remaining well above the strong results recorded in 2019.

Following the decline observed in 2024, exports rebounded in 2025:

- ✓ +9.2% in volume compared to 2024
- ✓ Revenue reaching nearly €29 million (+2.6% vs. 2024), a new record

Taken together, these figures confirm that Australia remains a small but steadily expanding market for Bourgogne wines.

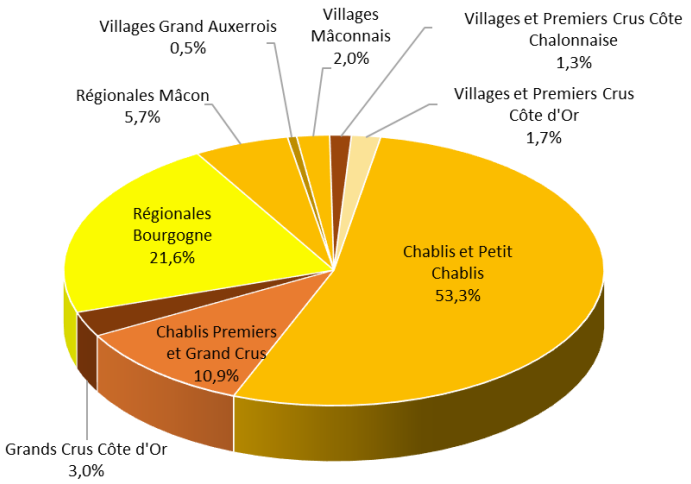
White wines remain the main driver of this performance, with a particularly strong increase in revenue in 2025 (+16% vs. 2024).

[1] At least one time per month

Chablis AOCs Clearly Dominate, Accounting for Nearly 44% of White Wine Exports

White wine exports (volume, 12 months of 2025)

White wines accounted for 69% of export volume to Australia and 55% of revenue (+4.5% in value vs. 2024).



✓ Chablis AOCs, representing nearly 44% of white wine export volume, rank first (55% of the category's value). After the slowdown in 2024, which followed several years of growth, 2025 is marked by a strong rebound (+23.5% in volume vs. 2024). This is a record, 7.4% higher than in 2023.

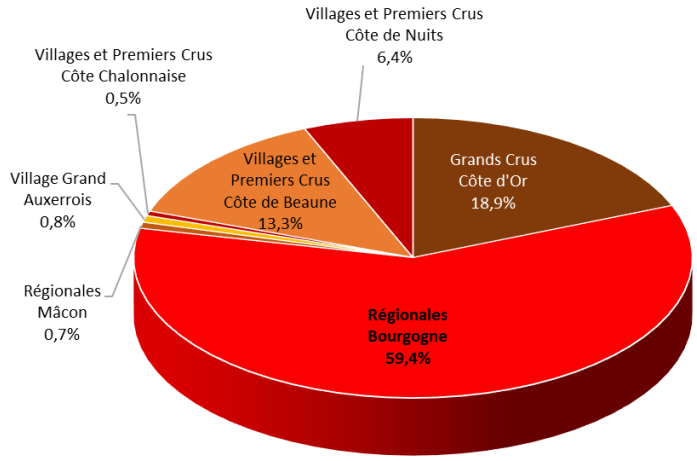
✓ The Bourgogne Régionale AOCs[2] account for 22% of white wine export volume, representing 27% of value. There was a slight decline in volume (-3% vs. 2024) and a more marked decrease in value (-12.3% vs. 2024). Revenue nonetheless remains among the highest levels, just behind the exceptional performance of 2024.

✓ The Côte d'Or Grand Cru AOCs are proportionally well represented: 3% of white wines exported for 7% of revenue. After an exceptional year in 2024, exports declined in 2025 (-28% in volume) while stabilizing in value (63.6% vs. 2024), nevertheless posting their second-highest revenue total on the Australian market.

✓ The Mâcon AOC[3] account for 8% of volume and 4% of value. After declining in 2024, exports of these wines moved sharply upward again: +40% in volume vs. 2024.

Crémant de Bourgogne accounted for 9% of export volume and 3.4% of revenue. Having lost ground since 2022 in this market, where alcohol-free sparkling wines are growing dramatically, Crémant de Bourgogne is once again trending positively: +7.2% in volume and +11% in value vs. 2024.

Red and rosé wine exports (volume, 12 months of 2025)



In 2025, well positioned in value terms, red wines accounted for 22% of volume (-6.6% vs. 2024) and 42% of revenue for Bourgogne wines in Australia. Revenue reached just over €12 million, as in 2024.

The market was largely dominated by two groups of appellations:

✓ The Bourgogne *Régionale* AOC[4] represent by far the largest share of exports, accounting for 59% of the category's volume and 53% of value. After a strong increase in revenue in 2024, they lost momentum in 2025: -11.1% vs. 2024. Even so, this revenue remains the highest of the past 10 years, excluding 2024, at €5.4 million.

✓ The Côte d'Or Grand Cru AOCs account for 19% of Bourgogne red wine volume and 24% of value. After two years of decline, exports of these wines soared in 2025: +95.4% in volume vs. 2024 (67,000 bottles) and +30.3% in value vs. 2024 (€2.7 million). This is an exceptional level, never previously reached for this AOC category.

[2] The Bourgogne *Régionale* AOC white wines include: Bourgogne, Bourgogne Aligoté, and Bourgogne followed by a geographical denomination, available in white

[3] The Mâcon *Régionale* category includes: Mâcon, Mâcon-Villages and Mâcon followed by a geographical denomination, available in white

[4] The Bourgogne *Régionale* AOC red wines include: Bourgogne, and Bourgogne followed by a geographical denomination, available in red/rosé

Bourgogne is Seizing New Opportunities in a Shifting Market

Off-Trade sales remain overwhelmingly dominant in Australia, representing between 80% and 90% of wine purchases, depending on the source. Both Off-Trade and On-Trade segments have declined since the end of the Covid period, which has weighed on Bourgogne wine exports.
However, several emerging consumption trends may support future growth.

- ✓ As consumers become more knowledgeable, demand is gradually shifting toward more premium wines, which benefits Bourgogne *Grand Cru* appellations. Between 2018 and 2023, the average purchase price of wines in the super-premium to prestige segment increased by 3%.
- ✓ *Régionale* AOCs also benefit from evolving consumer behavior. Generation Z (under 25) tends to consume wine more often during formal occasions at home, while Generation Y (millennials) purchases the largest overall volume of wine, both in the On-Trade and for home consumption.
- ✓ With 84 appellations, Bourgogne wines offer a remarkable diversity of styles and aromatic expressions suited to a wide range of occasions. This diversity creates opportunities to introduce new experiences that resonate with younger generations.

Today, exports remain concentrated mainly on *Grand Crus* and certain *Régionale* appellations. Communication initiatives led by the Bourgogne Wine Board aim to draw greater attention from prescribers to the core of the appellation pyramid: the *Village* AOCs, particularly those that remain less widely known, such as Santenay, Côte de Nuits-Villages, Saint-Véran, Irancy, and Rully, as well as *Régionale* appellations with geographic denominations such as Bourgogne Côte d'Or and Mâcon-Chardonnay.

Positioned with strong value for money, these appellations are attracting growing interest from distributors seeking more accessible Bourgogne wines while preserving the qualities that define the region: elegance, finesse, and a clear expression of origin.

Economic report prepared by the Economic Intelligence and Strategy Unit – March 2026
(Sources: French Customs DEB & EMEBI + DAU – IWSR – BIVB)

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