BOURGOGNE
Bourgogne Wine Board

US market: in a sluggish economy, Bourgogne white wines are performing well

Key figures for the first ten months of 2023 for Bourgogne wines in the United States

The number one export market for Bourgogne wines in terms of value and volumes

Exports: 15 million bottles (down 6.6% compared with the same period in 2022) for €243 million (down 1.4% compared with the first ten months of 2022)

made up in volume of → Still white wines: 63 %
→ Still red/rosé wines: 26 %
→ Crémant de Bourgogne: 11 %

For the first ten months of 2023, Bourgogne wines accounted for 12% of the volumes exported by French AOCs to the United States, for 14% of turnover. Bourgogne white wines accounted for 33% of French AOC white wine export volumes in the same period.

In a challenging global environment, the US economy has held up well so far, growing by 5.2% in the third quarter of 2023. This strong growth is based on American households continuing to spend, fuelling the main engine of the US economy. Nevertheless, this spending was largely targeted towards rising electricity costs, healthcare and medicines, and financial services and insurance.

Against this backdrop, Bourgogne wines seem to be marking time, both because of a shortage of wine (volumes of the 2022 vintage are gradually coming onto the market from summer 2023) and because of the choices made by some households. The volumes for 2022 and 2023 should lead to an easing of the market and facilitate trade.

Volumes and values down slightly

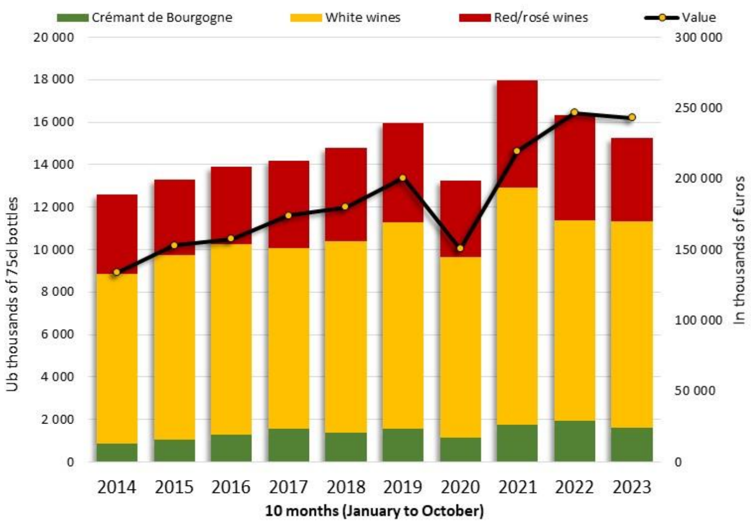
While volumes exported to the United States were down over the first ten months of 2023 (a fall of 6.6% compared with the same period in 2022), they were still up on the pre-Covid period (an increase of 5.7% compared with the 10-month average for 2015-2019).

Sales of **Bourgogne white wines** are increasing again after a pause in 2022 (up 2.7% compared with the first 10 months of 2022), thanks to the 2022 harvest, which is bringing quality volumes back onto the market.

After enjoying handsome increases in volume in 2022, **red wines and Crémant Bourgogne** faced a slowdown in sales in 2023. Crémant de Bourgogne, however, remains on an upward trajectory on the five-year average: up 3% in volume (for the first 10 months of 2023 compared with the average for the same period in 2022-2018).

Exports of Bourgogne wines to the USA

Sources: French customs / DEB&EMEBI+DAU / BIVB



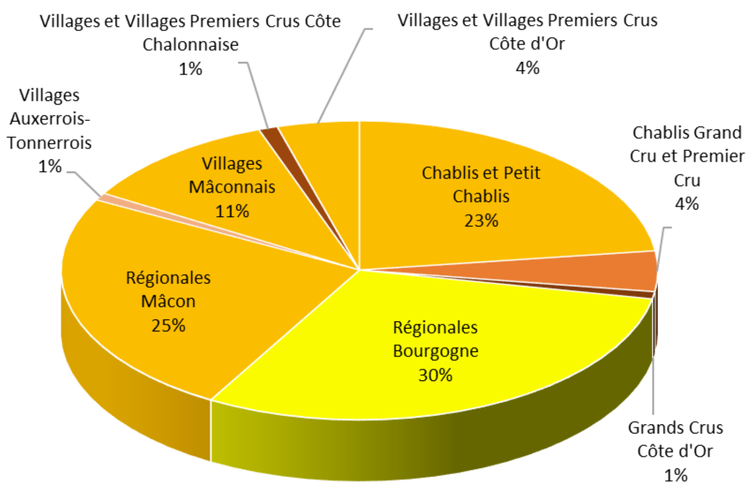
Turnover for Bourgogne wines in the United States fell slightly over the period (down 1.4% compared with the first ten months of 2022). Nevertheless, after several years of growth, it remains in a strong position ahead of the five-year average (up 22% over the first 10 months of 2023 compared with the average for the same period 2022-2018). 2023 is in fact another record year in terms of turnover, just behind 2022 (with a turnover of just over €240 million for the first ten months).

The United States alone accounted for almost 20% of turnover and 21% of volumes of Bourgogne wines exported in the first ten months of 2023!

*Régionale AOC*s dominate the American market, accounting for almost two thirds of exports

Exports of white wine (volumes, total for the first ten months of 2023)

Over the first ten months of 2023, Bourgogne white wines accounted for 63% of volumes exported to the United States, and 54% of turnover (up 6.1% compared to the same period in 2022).



***Régionale AOC* Bourgogne**[1] accounted for 30% of white wine volumes, and 29% in terms of value. Although these AOCs have seen a downward trend in recent years, their growth has been maintained compared to the pre-Covid five-year average (up 6.2% compared with the five-year average for the first ten months 2019-2015).

✓ **The Chablis *AOC*s,** accounting for 27% of white wine exports by volume, are in second place (25% of white wine in terms of value). The share of Chablis wines in Bourgogne's white wine offer remains lower than in other markets. This is due to a lingering image problem linked to the use of its name by local entry-level products. The steady growth of these AOCs, particularly Chablis and Petit Chablis, suggests this gap is closing.

Chablis *AOC*s now account for 17% of Bourgogne wine volumes exported to the United States, all colours combined, for just over 13% of turnover (first ten months 2023)

- ✓ **The Mâcon *AOC*** is in third place, with 25% of volumes (12% in terms of value). The return of qualitative volumes available for the 2022 vintage is revitalising sales: an increase of 26.7% in volume and 39.8% in turnover compared with the first ten months of 2022.
- ✓ **The *Village AOC*s in the Mâconnais** (including Pouilly-Fuissé *Premiers Crus*) come next, with 11% of volumes and 9% of value. Thanks to 2022 availability, sales have also picked up: an increase of 14.4% in volume and 21% in sales compared with the first ten months of 2022.

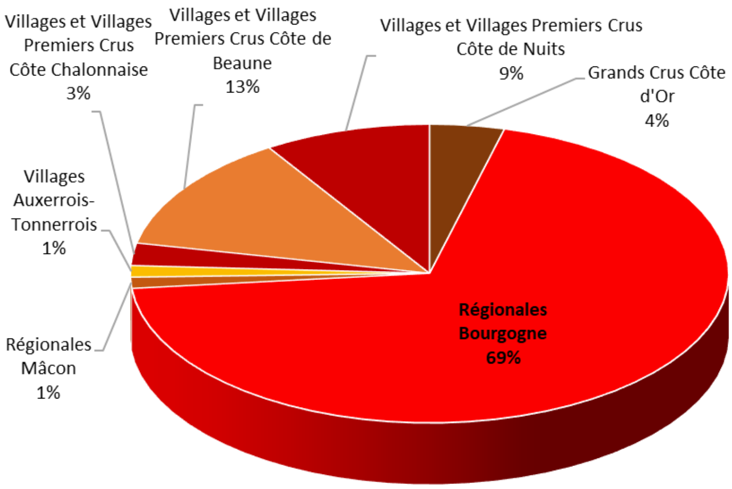
Crémant de Bourgogne accounts for 11% of export volumes and just over 4% turnover for Bourgogne wines on the US market. With a market share of 8.4% in terms of volume and 15.5% in turnover, Crémant de Bourgogne remains the number one French sparkling AOC, excluding Champagne, exported to the USA. This is despite a sharp drop in volumes (down 13%) and value (down 28.5%) over the first ten months of 2023 compared with the same period in 2022.
Despite this year's results, Crémant de Bourgogne has been increasing in popularity overall in the USA for the past 20 years. Proof of this is that it continues to grow by 3.3% in terms of volumes and by 6.8% in terms of sales (first ten months of 2023 compared to the five-year average for the same period 2022-2018).

[1] AOC Bourgogne white wines: Bourgogne + Bourgogne plus geographical denomination available in white

Exports of red and rosé Bourgogne wines (volumes, total for the first ten months of 2023)

Over the first ten months of 2023, red wines represented 26% of volumes (down 20% on the same period in 2022), and 42% of turnover for exported Bourgogne wines (down 5.5% on the same period in 2022).

The market is largely dominated by two groups of appellations:



- ✓ **The Bourgogne AOC** [2] represents the vast majority of purchases, accounting for 69% of Bourgogne red wine volumes and 39% in terms of value.
Although sales for the first ten months of 2023 are down (a fall of 6.6% compared with the same period in 2022), they remain the second-best results of the last ten years, at €39 million.

- ✓ In second position, the **Village and Village *Premier Cru AOCs* of Côte de Beaune and Côte de Nuits** account for 22% of Bourgogne red wine volumes, 31% in terms of value
Although sales of these appellations in the first ten months of 2023 are down (a fall of 10.7% compared with the same period in 2022), at €31 million, they come just after the record year of 2022, and continue to show excellent growth compared to pre-Covid figures: an increase of €5.5 million compared with the five-year average for the first ten months 2018-2022.

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(Sources: Customs DEB&EMEBI+DAU - BIVB)

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[2] AOC Bourgogne red wines: Bourgogne red wines + 13 Bourgogne plus geographical denomination available in red