

Canada, The 3rd Largest Export Market for Bourgogne Wines by Volume



2024 Key Figures for Bourgogne Wines in Canada

3rd largest market by volume

6th largest market by value

Exports: 7.9 million bottles (+15.9% compared to 2023) valued at 79.5 million euros (+15.7%/2023).

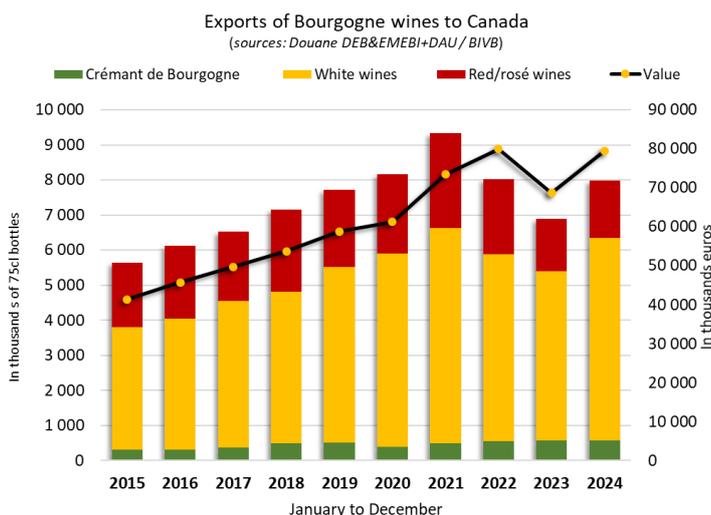
Breakdown by volume	▶ Still white wines:	72%
	▶ Still red wines:	21%
	▶ Crémant de Bourgogne:	7%

In 2024, Bourgogne wines accounted for 17.3% of the volume of French AOC wines exported to Canada, representing 21.5% of the revenue.

Bourgogne white wines made up 42.2% of the exported volumes of French AOC white wines.

Although the adult population in Canada continues to grow, the number of regular wine consumers is decreasing, down by 1.4 million monthly consumers in 2023 compared to 2019. The five-year outlook does not foresee a reversal of this trend (IWSR 2024). Wine is the only beverage category in 2024 to have seen a decline in market share. Wine sales have reached their lowest level since 2010-2011, with 500 million liters of wine sold (*StatCan 2024*). However, in this context and among French wine regions, Bourgogne stands out as an exception, with exports showing a rebound after two years of decline.

Bourgogne Wines are Finding New Avenues for Growth



After two years of decline, Bourgogne's exports to Canada are starting to rebound. It is the French AOC wine region that has shown the most growth, both in volume and value:

- ✓ +15.9% in volume, or nearly 1 million additional bottles sold
- ✓ +15.7% in revenue, or 10.8 million euros more than in 2023

White wines are primarily responsible for these strong results, accounting for nearly 90% of the additional bottles sold (2024 vs. 2023), with an almost 20% increase in volume compared to 2023. With over 5.7 million bottles exported for nearly 51 million euros,

Bourgogne white wines represent 42.2% of the French AOC white wine volumes entering Canada, accounting for more than 52% of the revenue.

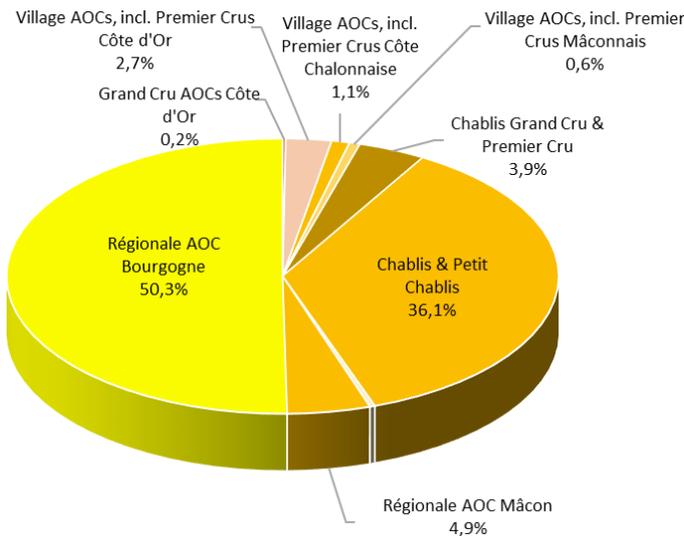
For over 20 years, Bourgogne has maintained its leading position in revenue among French AOC wine regions for this color. Despite a slight decline in 2022 and 2023, following the exceptionally low production year of 2021, Bourgogne white wine exports have rebounded, surpassing even the five-year average: +8% in volume (2024 vs. 2019-2023 average), particularly driven by Chablis (+36% over this period).

After two strong years of growth, Crémant de Bourgogne has slightly declined, with just over 561,000 bottles exported (-1.1% in 2024 vs. 2023) for a revenue decrease of 2.2%. It remains the best-selling French sparkling wine AOC (excluding Champagne) in this country, representing 45.2% of the volume and 47.6% of the revenue in the category (2024).

Régionale AOCs are the Most Exported Bourgogne Wines

Bourgogne white wine exports to Canada (2024 volume)

White wines account for 72% of Bourgogne wine exports, with a market share that continues to grow.



✓ Bourgogne AOC wines (including Bourgogne plus a geographical denomination, or Bourgogne+) account for 50% of the exported volume in this category, representing 43% of the value (+31.9% in volume and +53.1% in value in 2024 vs. 2023).

✓ Chablis AOCs follow closely, accounting for 40% of the volume and 43% of the value. The Chablis and Petit Chablis duo saw a volume increase of 32.3% compared to 2023, contributing an additional 3.3 million euros to revenue, which now totals 18 million euros - a 22.5% rise over 2023.

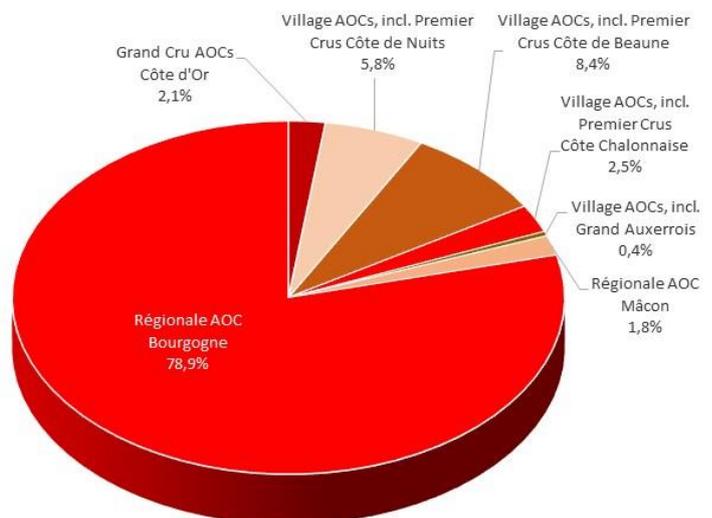
✓ Mâcon AOC wines (Mâcon, Mâcon-Villages, and Mâcon plus a geographical denomination, or Mâcon+) come in third, but far behind: 5% of the volume and 4.6% of the value. After a decline in 2023, these wines have returned to growth: +21% in volume in 2024 vs. 2023. Revenue highlights the category's increasing premiumization, with a 40.6% rise compared to 2023 (+2.3 million euros).

Bourgogne red wine exports to Canada (2024 volume)

The share of Bourgogne AOC wines (including Bourgogne+) is even more dominant in red wines, accounting for 79% of the volume in this category. More accessible than other appellations, these wines represent 47% of the 2024 revenue.

After two years of volume decline, red wines from Bourgogne are making a strong comeback in this market. Following a record year in 2022 and a significant drop in 2023, revenue is back on track in 2024, rising by 10.4% compared to 2023, which translates to a gain of 2.3 million euros, bringing the total to over 24.77 million euros.

Bourgogne AOC wines (including Bourgogne +) continue to dominate, showing solid growth in both volume (+10.7% vs. 2023) and value (+21.8%). The Village and Village Premier Cru AOCs from the Côte Chalonnaise are also gaining traction in this market, with a volume increase of 29.7% and a revenue boost of 67.4% compared to 2023. As a result, they now account for 2.5% of the volume and 3.3% of the revenue from red Bourgogne wines in Canada.



Consistently growing for the past 20 years, Crémant de Bourgogne seems to have reached a plateau, with slightly more than 560,000 bottles exported annually and a revenue of around 3.8 million euros. However, this appellation, which now represents 12% of Bourgogne's wine production, may not be done conquering the Canadian market.

Quebec Would Be the 6th Largest Export Market for Bourgogne Wines on Its Own!

According to data from the Société des Alcools du Québec (SAQ), for the 12-month period from April 2023 to March 2024, the province on its own absorbs 69% of all Bourgogne wines exported to Canada!

As a result, Quebec is by far the most important market in the country. The French-speaking province imports more Bourgogne wines than Sweden or Denmark, making it the 6th largest export market for our vineyard in volume.

After a 20% drop in the previous year, Bourgogne wine sales in Quebec are on the rise again, reaching over 5.5 million bottles for the most recent SAQ fiscal year (April 2023 to March 2024). This volume is still well above pre-Covid sales levels.

Revenue for this period reached a record high of 152.7 million Canadian dollars, up by 15.5% compared to the 12-month total ending March 2023.

The SAQ primarily sells Bourgogne white wines, and their share continues to grow, accounting for 73% of the volume in the most recent fiscal year. Red wines represent 21% of sales. Crémant de Bourgogne now accounts for 5.7% of the volume of Bourgogne wines sold in Quebec.

- ▶ **White wines** (69% of value): They are making a strong comeback thanks to two excellent harvests, with a growth of +17.5% in the most recent SAQ fiscal year, reaching sales of 4 million bottles. The main appellations in volume have benefitted from this growth: +30.2% in volume for the Bourgogne Aligoté AOC (39% of the volumes sold), +30.8% for the Chablis AOC (22% of the volumes), +13.7% for white Bourgogne *Régionale* AOCs (16% of the volumes sold), and +14.8% for the Mâcon-Villages AOC (12-month total ending March 2024 vs. 12-month total ending March 2023).
- ▶ **Red wines** (26% of value): After a year of decline, red Bourgogne wines are following the same recovery path as the whites: +3% in volume and +9.4% in revenue (12-month total ending March 2024 vs. 12-month total ending March 2023). With 84% of the volume sold and 59% of the revenue, the *Régionale* AOCs account for the bulk of this growth: +2.3% in volume and +4.5% in value (12-month total ending March 2024 vs. 12-month total ending March 2023).
- ▶ **Crémant de Bourgogne** (5% of value): This AOC is benefiting from Quebec's current enthusiasm for sparkling wines, with a third consecutive year of growth in both volume (+6.8%) and revenue (+9.8%) (12-month total ending March 2024 vs. 12-month total ending March 2023).

While waiting for the results of the SAQ's 2024-2025 fiscal year, the early figures for 2024 from Bourgogne confirm the continued growth of Bourgogne white wines: +7.4% in volume and +6.3% in revenue (2024 vs. 2023).

The two largest AOCs in volume sold by the SAQ support this dual growth:

- Bourgogne Aligoté: +13.3% in volume vs. 2023 (1.64 million bottles).
- Chablis AOC: +17.2% in volume vs. 2023.

Crémant de Bourgogne continues to grow in Quebec: +15.6% in volume and +17.4% in revenue. Red Bourgogne wines have stabilized their sales at 1.13 million bottles, generating a revenue of 38.2 million CAD by the end of 2024.

Ontario: The Growth of Crémant de Bourgogne Does Not Offset the Decline in Overall Bourgogne Sales

In contrast to the SAQ, the overall sales of Bourgogne wines through the LCBO (Ontario's monopoly) have slowed for the second consecutive year as of March 2024, with a 12% decline in volume compared to the previous year. This decline affects all sales, both imported wines (66% of volume) and local wines, a trend that has been ongoing since the 2021 fiscal year.

A total of 729,097 bottles of Bourgogne wines were sold, generating revenue of 26.9 million Canadian dollars for the 12-month period ending March 2024.

- ▶ Among the wines, **white wines** remained the majority, accounting for 60% of sales, with 438,000 bottles sold and 15.7 million Canadian dollars in revenue. Three groups of appellations dominate the market. Chablis wines are the most prominent, making up 52% of volumes sold. Bourgogne *Régionale* AOC wines account for 29%, and Mâcon *Régionale* AOC wines represent 12%. Only Chablis wines experienced growth during the 2023-2024 fiscal year, with a 9.5% increase in volume and a 5.7% increase in revenue compared to the same period in 2023. The Chablis AOC, representing 85% of these volumes, continues to perform strongly, with a 6.3% volume increase and a 7.3% increase in revenue.
- ▶ **In the red wine category**, 130,000 bottles were sold, representing 19% of the total volume. The Bourgogne Pinot Noir AOC accounted for 83% of this, with 117,000 bottles sold, generating 3.7 million Canadian dollars in revenue. The remaining 17% was distributed among several appellations, particularly the Village AOCs from the Côtes de Beaune and Côtes de Nuits, which together accounted for more than half of the revenue in this category, with notable price increases.

After a year of decline, **Crémant de Bourgogne** sales rebounded, reaching 151,000 bottles, an increase of 18.6%, and generating nearly 4 million Canadian dollars in revenue, up 35.6% compared to the 12-month period ending March 2023.

A total of 461 references of Bourgogne wines were marketed during the studied period. The top 10 references accounted for 62% of the volume of Bourgogne wines sold, and the top 25 represented 88% of the volume.

Nearly 300,000 Bottles of Bourgogne Wines Sold in British Columbia

During the last fiscal year ending in March 2024, wholesale sales of Bourgogne wines through the monopoly declined by 7.1% in volume compared to the previous year. This represents 298,000 bottles sold, generating 14.2 million Canadian dollars in revenue, a 3.5% decline compared to March 2023.

Despite two years of decline, sales remain well above pre-COVID levels, up 12.3% in volume and 25.7% in value compared to March 2020.

- ✓ **White wines** continue to dominate, accounting for 63% of total sales. They have retained the benefits of the consumption surge observed during the COVID pandemic. Despite a slight volume decrease of 4.8%, revenue increased by 2.2% compared to March 2023. Chablis wines represent the largest share, with 112,000 bottles sold, accounting for 60% of white wine sales. Chablis volumes increased by 1.7%, while revenue grew by 6.1%. The next largest category is *Régionale* Bourgogne AOC wines, with 34,000 bottles sold, representing 18% of white wine volume, primarily driven by Bourgogne Chardonnay AOC.

- ✓ **Crémant de Bourgogne** sales, which make up 14% of total Bourgogne wine sales, remained stable at around 41,000 bottles, an increase of 2.5% compared to March 2023. Revenue reached nearly 1 million Canadian dollars, up 7.4%.
- ✓ **Red wine** sales, representing 23% of the total, declined once again, falling 17.4% during the period. Volumes are now below pre-pandemic levels. *Régionale* Bourgogne AOC wines accounted for 67% of red wine sales and 34% of revenue. Meanwhile, Village and Village Premier Crus from the Côte d'Or represented 28% of volumes but generated 62% of revenue for the period ending March 2024.

A total of 262 references of Bourgogne wines were available during this period. White wines accounted for 54%, red wines for 45%, and Crémant de Bourgogne for 1%.



Economic report written by the Markets and Development Unit - BIVB –February 2025
(sources: Customs DEB&EMEBI+DAU - BIVB – the Québec SAQ and other monopolies)

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