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Burgundy red wine sales remain weak as cellar releases fall

A June regional report said warm weather sped vine development toward the 2026 crop, but demand for reds continued to drag on turnover.

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Vineyards across Burgundy and Franche-Comté moved quickly through flowering in late May and early June, while sales of Burgundy red wines remained under pressure, according to the French regional agriculture office's June market report published on Tuesday.

The report from DRAAF Bourgogne-Franche-Comté said unusually high temperatures during the 22nd week of the year accelerated vine growth across the region. Flowering has already ended in many parcels, and fruit set is now the main stage observed. Vineyard health was described as generally satisfactory, with only limited signs of downy mildew reported in the Côte Chalonnaise and the Mâconnais.

The pace of development varies by area. In the Jura, later sites were still around mid-flowering, while some of the earliest parcels in Yonne, Côte-d'Or and Saône-et-Loire had already reached the "pea-sized berry" stage. For growers, that means the 2026 crop is advancing under warm conditions after a rapid spring push.

The stronger concern in the report was commercial rather than agronomic. Burgundy red wines continued to lag in both cellar releases and broader market demand. In March, the eighth month of the 2025-26 wine campaign, cellar releases from Burgundy vineyards fell 6% from both the previous campaign and the five-year average. Côte-d'Or posted the weakest result, with releases running 40% below its average, leaving about 30,000 hectoliters still held in cellars in March.

Across the region, total cellar releases for the campaign reached 1.36 million hectoliters over eight months, down 7.4% from the five-year average for the same period. The decline was not uniform. Yonne and Saône-et-Loire showed better momentum, with volumes up 8% and 4%, respectively, compared with their own average release levels.

The report points to a broader slowdown in still wine consumption, especially for reds. In French supermarkets, total still wine sales in the first quarter of 2026 were down 3% from a year earlier, equal to 6 million fewer bottles sold. Of that decline, 40% involved French AOC wines. Over a rolling 12-month period through the end of March, the drop reached 27 million bottles.

Red wines took the hardest hit, though Burgundy regional appellations showed more resilience than some competitors. White wines also slipped, but by a smaller margin of 2%. Within that category, Burgundy appellations rose 4%, helped by wines from villages in the Mâconnais and Petit Chablis in the €8 to €12 price range.

Bulk transactions between growers and merchants also weakened sharply in April. For Burgundy AOP wines excluding Beaujolais and wines from Nièvre and Jura, total bulk trade fell 22% from April 2025. Red and rosé volumes dropped 38% for the month and were down 12% over the campaign to date. White wine bulk volumes fell 17% in April and were down 2% over the campaign. Crémant was a rare bright spot, with campaign volumes up 4%.

Prices in bulk markets moved only moderately overall, but there were notable exceptions. Chablis prices were down 17% from April 2025, while Saint-Véran rose 13%. In Beaujolais, transaction volumes deteriorated further by the ninth month of the campaign, falling 17% from a year earlier.

Exports offered some support for Burgundy producers. In the first quarter of 2026, Burgundy wine exports rose 4.6% by volume from a year earlier and increased 2.7% by value. The gains came mainly from sparkling wines and whites. Red wine exports fell 2.8%, reflecting weaker global consumption trends. Even so, that decline was less severe than those recorded for Bordeaux reds, down 9.3%, and Languedoc-Roussillon reds, down 18.6%.

The June report also underscored how weather is shaping other farm sectors in Bourgogne-Franche-Comté. A week of extreme heat raised concerns about heat damage in winter cereals. Winter barley was moving from milk stage to dough stage on average, with harvest expected about a week early, starting around June 10 in Nièvre and around June 18 in Jura. The expected yield is 61 quintals per hectare, down 3% from the five-year average.

Soft wheat fields were generally described as looking good, though some areas showed low density. The sharp temperature swing between mid- and late May created risks during flowering when temperatures exceeded 95 degrees Fahrenheit equivalent thresholds cited in the report. Wheat prices were stable in May at €188 a metric ton delivered Rouen, while barley rose to €214 a ton delivered Creil.

Rapeseed remained supported by biodiesel demand and energy market conditions. The price reached €527 a ton FOB Moselle in May, up €4 on the month. Even so, yield expectations are lower than normal. The regional forecast for rapeseed is 28 quintals

per hectare, down 12% from average. Some mustard fields also suffered flowering accidents that reduced pod counts by about 10%.

The report estimated that rapeseed acreage for the 2026 campaign rose sharply to 153,700 hectares, up 34% from the five-year average. Wheat area was unchanged at 356,700 hectares. Spring barley area fell 19%, sunflower area declined 6%, soybean area increased 9%, and pea plantings dropped 57%.

In dairy, milk collections continued to run ahead of last year’s levels in March. Across Bourgogne-Franche-Comté, deliveries rose 6.3% from March 2025, outpacing France as a whole at 5.6%. The increase came mainly from conventional milk production, which climbed 10%, compared with a 3.2% rise for milk under the Massif du Jura AOP system.

The regional agriculture office said investment in robotic milking systems has helped farms raise output as producers try to offset lower milk prices and cover equipment costs. March milk collections in the region reached 1.481 million hectoliters, above both last year’s level and the three-year average.

Milk prices moved in different directions depending on category. Conventional milk prices continued to fall. In Bourgogne-Franche-Comté they averaged €460.1 per 1,000 liters in March, down 7.2% from a year earlier and below the three-year average. By contrast, Massif du Jura AOP milk averaged €711.4 per 1,000 liters in February data cited by the report, up about 2% year over year.

Cheese production trends also diverged. Most dairy product output increased from last year except Comté, where production is constrained by interprofessional campaign rules that set volume limits. Some AOP milk was redirected away from Comté toward Morbier instead.

For Burgundy wine producers and merchants, the June snapshot shows two different realities at once: vines are advancing under mostly healthy conditions after an early burst of heat, but red wine sales remain weak enough to slow cellar turnover across one of France’s most closely watched regions for premium wine supply and pricing.