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French non-IG white wine prices jumped 14.9% in one week

RNM-FranceAgriMer data showed the sharpest week 40 contract-price gain, highlighting a widening split with weakening red wines.

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French wine contract prices moved sharply in different directions in the latest weekly market data, with white and rosé wines sold without a protected geographical indication posting strong gains while red wines, especially those in the same non-IG category, fell steeply. The figures come from the official RNM-FranceAgriMer bulletin dated October 8 and compare week 40 with week 39 in France.

The biggest drop was in red wine without geographical indication, listed in the data as “Rouge Vin sans IG.” Its weekly contract price fell to €70.72 per hectoliter from €79.32 per hectoliter, a decline of €8.60 per hectoliter, or 10.8%, in one week. That was the largest negative move among the categories shown in the table and stands out because it came at the same time as strong increases for some white and rosé wines in the non-IG segment.

White wine without geographical indication, listed as “Blanc Vin sans IG,” rose to €93.83 per hectoliter in week 40 from €81.65 per hectoliter in week 39. That was an increase of €12.18 per hectoliter, or 14.9%. Rosé wine without geographical indication, listed as “Rosé Vin sans IG,” showed the same movement, rising from €81.65 to €93.83 per hectoliter, also up 14.9%. Those gains were the largest positive changes in the bulletin and point to a clear split inside the French wine contract market over the week.

Prices for wines with geographical indication, or IGP, moved differently. White IGP wine was listed at €104.66 per hectoliter in week 40, down from €110.45 per hectoliter in week 39, a decline of 5.2%. Rosé IGP wine was listed at the same prices and showed the same 5.2% fall, from €110.45 to €104.66 per hectoliter. Red IGP wine also weakened, falling to €75.37 per hectoliter from €80.74 per hectoliter, a decrease of €5.37 per hectoliter, or 6.7%.

Taken together, the data show a market that did not move in one direction across all wine types. Instead, it split by category. Non-IG white and rosé contract prices rose sharply, while both IGP wines and red wines lost ground. The contrast was strongest between non-IG rosé and non-IG red. While rosé without geographical indication gained 14.9%, red without geographical indication fell 10.8%. That is a spread of 25.7 percentage points between two categories inside the same broad national market over the same period.

FranceAgriMer’s bulletin presents these figures as weekly contract prices, not as retail shelf prices paid by consumers in stores. That distinction matters because contract prices reflect agreements in the supply chain and can move for reasons that do not immediately appear in consumer prices. The data in the table also do not include associated trading volumes, which means the bulletin does not show whether the

weekly changes were driven by a broad set of contracts or by a smaller number of transactions at different price levels.

The release also does not provide year-over-year numerical comparisons in the table cited here. As a result, the week-to-week changes give a snapshot of short-term pricing but do not, on their own, prove that a longer trend has formed. A one-week movement can reflect changes in the mix of contracts signed during the period, and without volume data it is not possible to separate a pure price shift from a change in the composition of what was traded.

Even with those limits, the latest bulletin shows an unusually clear divergence inside the French market. White and rosé wines without geographical indication both posted near-15% weekly gains, while red wines weakened across both segments and non-IG red recorded a double-digit fall. The figures were published by RNM-FranceAgriMer on page 3 of its official market bulletin dated October 8.