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Liv-ex data show fine-wine trading slowed across every major purchasing region

The pullback followed the market’s strongest month since November 2023, with costly Burgundy labels still drawing buyers

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Fine-wine trading slowed in the latest weekly data published by Liv-ex on Monday, November 9, after the market posted its strongest month since November 2023, with buyers pulling back across every major purchasing region even as expensive Burgundy

bottles continued to change hands actively.

Liv-ex said all four buying geographies purchased less in the latest week than in the previous one. The pullback pointed to softer trading levels after a stronger October, though the market remained active in several high-value labels and the regional mix shifted rather than moving in one direction across every category.

Bordeaux remained the largest part of the market by traded value, but its share fell to 32.0% from 41.4% in the previous week. Liv-ex said Mouton Rothschild, Lafite Rothschild and Petrus were the region’s most-traded wines by value, with each accounting for more than 10% of Bordeaux trade during the week.

Some of the week’s biggest individual trades still came from outside Bordeaux. Liv-ex said Leroy’s Richebourg 2015, Mouton Rothschild 2023 and Romanée-Conti from the 2013 and 2014 vintages were among the top five wines overall by traded value.

Burgundy followed closely behind Bordeaux, taking a 26.3% share of traded value. The region’s activity was led by high-priced bottles, with Leroy’s Richebourg 2015 and two vintages of Romanée-Conti ranking among the most-traded wines in the wider market. That performance showed that even with lower overall purchasing, buyers were still willing to deploy capital in sought-after Burgundy labels.

Champagne increased its share of traded value to 12.5% from 8.5% in the previous week. Liv-ex said non-vintage and higher-volume wines led trading in that category, a different pattern from Burgundy, where rarer and more expensive bottles dominated activity.

Italian wines from Tuscany and Piedmont accounted for a combined 14% of traded value. Sassicaia was the top-traded Italian wine by value, and the 2008 vintage ranked among the top five wines overall. Liv-ex said Soldera Case Basse and Gaja also traded actively.

The data matter beyond collectors because weekly trading patterns in fine wine can offer merchants, distributors and investors a direct read on liquidity and demand in the high-end wine market. A drop in total purchases after a strong month may suggest

more selective buying, while the continued strength of top Burgundy and the gain in Champagne can shape pricing, stock decisions and expectations for where demand is holding up across premium beverages.

Liv-ex did not describe a broad retreat from top labels. Instead, its weekly snapshot showed a market that cooled after a busy stretch while continuing to concentrate value in a relatively small group of established names, including Mouton Rothschild, Romanée-Conti, Leroy and Sassicaia. Liv-ex said Soldera Case Basse and Gaja also traded actively.