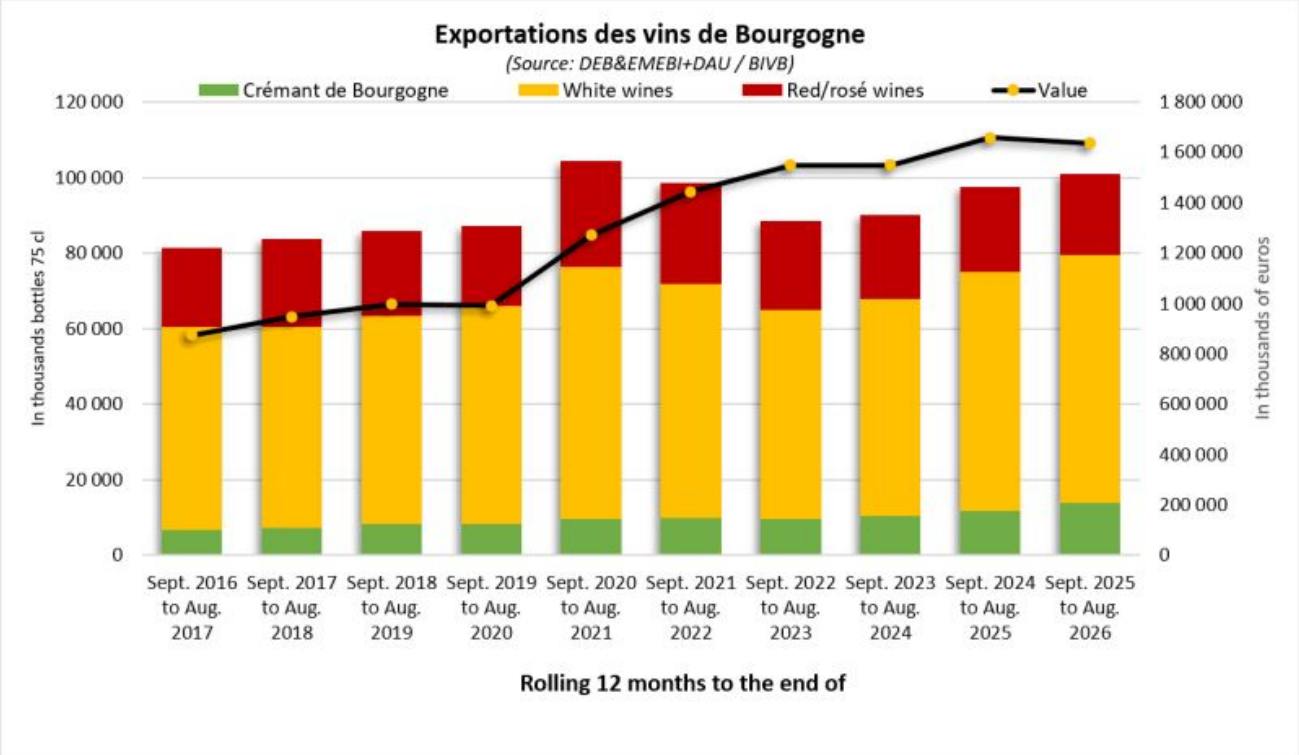
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Burgundy earned less from wine exports despite shipping nearly 101 million bottles abroad

Price repositioning boosted white wine and Crémant shipments, leaving average export revenue per bottle about 4.7% lower

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Burgundy shipped more wine abroad in the 12 months through August 2026, but it earned less from those exports, a sign that higher volumes are not yet restoring revenue for producers in the French wine region.

According to a report published on Monday, November 16, by Wine Industry Advisor, citing an economic update from the Burgundy Wine Board based on customs data, exports from Burgundy reached nearly 101 million bottles in the 12 months ended August 2026. That was 3.5% more than in the comparable period ended August 2025, or about 3.4 million additional bottles. Export revenue, however, fell 1.4% to €1.65 billion.

The figures refer to Burgundy wines, not to French wine exports as a whole. They also cover a rolling 12-month period rather than a single month, and the reported totals are rounded. Based on those totals, average export revenue per bottle declined by about 4.7%, though that measure alone does not show how much of the change came from lower prices, product mix, or currency effects.

The Burgundy Wine Board said the revenue decline reflected price repositioning in some markets. That suggests producers moved more wine by adjusting commercial terms, especially in categories where demand has been more price-sensitive. The data point to a market where volume recovery is proving easier than revenue recovery.

Burgundy still performed better than the broader French export market on volume. Over the same 12-month period ended August 2026, French wine exports overall fell 1.3% by volume and 2.7% by value, the report said. Burgundy, by contrast, added shipments even as the money generated by those sales slipped.

The increase in Burgundy exports was driven mainly by sparkling wine and white wine. Crémant de Bourgogne added about 2.1 million bottles over the year, while white wines added about 2.4 million bottles. The strongest gains came from regional Burgundy appellations, Chablis and Petit Chablis, and the Mâcon regional appellations. The report tied part of that performance to lower market prices.

Red wines moved in the opposite direction. Export volumes for Burgundy reds fell by about 1.12 million bottles over the period. The decline was concentrated in village-level appellations from the Côte de Beaune and Côte de Nuits, which dropped 16.1%, and in regional Burgundy appellations, which slipped 0.7%. The weaker showing for reds fits a broader slowdown in demand for that segment.

Export trends also varied sharply by country. In the United States, Burgundy exports fell 6.9% by volume and 17.9% by value in the 12 months ended August 2026, compared with the equivalent period a year earlier. The report said the U.S. market had been disrupted by tariffs imposed by the Trump administration and by inventories built up in 2024 and 2025 ahead of those measures.

Shipments to Canada also slowed after a strong 2025. Burgundy exports there fell 6.6% by volume and 1.9% by value over the same period. The United Kingdom was the main exception among the larger markets, with Burgundy exports rising 13% by volume and 3% by value, though the report said that rebound did not offset the decline in Burgundy's two biggest export destinations.

The export numbers were released against a mixed backdrop for Burgundy's overall business. Over the 12 months ended September 2026, bottled sales for the region rose 0.4% to nearly 200 million bottles, supported by white wines and Crémant de Bourgogne. White wine sales edged up 0.8% to 117 million bottles, while red wine sales fell 4.1%. Crémant de Bourgogne posted growth of just over 7%.

The domestic market remained soft in some channels. Sales of Burgundy wines in French mass retail stores fell 1.6% in the 12 months from mid-October 2025 to mid-October 2026, according to the report. That decline added to the pressure on producers already dealing with changes in wine consumption patterns and weaker demand for reds.

Supply conditions are also tightening. The Burgundy Wine Board said still wine stocks were down 3% at the end of September 2026 from a year earlier, while stocks of Crémant de Bourgogne rose 5%. The region's 2026 harvest was estimated at 1.08 million hectoliters, below a five-year average of about 1.5 million hectoliters. Existing inventories should help meet demand in the near term, the board said, but lower yields have become a structural issue.

Stock trends differed by color and appellation. White wine inventories fell 3.9% from a year earlier, with a sharp 17% drop in stocks of Mâcon regional appellations, which the report linked to price adjustments and two small harvests. Chablis stocks, by contrast, increased after a larger 2025 harvest. Red wine stocks fell 1.7%, a modest decrease

given the smaller 2025 crop, and the board said that partly reflected slower sales.

For Burgundy producers, the export data show both resilience and strain. White wines and sparkling wines are still finding buyers, especially when pricing becomes more competitive, but that strategy is weighing on revenue. Red wines remain under pressure, and some of the region’s most important overseas markets are slowing at the same time.

The report said Burgundy is also looking beyond its traditional destinations. It pointed to South Asia, especially India, as a market worth developing. An exploratory mission visited India in late October in partnership with regional business and government bodies, with about a dozen Burgundy companies taking part.