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Red Burgundy sales fell 4.1% in the year ending September 2026

White Burgundy rose 0.8% to 117 million bottles, supported by exports and price cuts in some markets

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Burgundy’s wine market lost momentum in the 12 months ending September 2026, with red wines posting a clear decline while whites held up and sparkling wines gained ground, according to figures released in November by DRAAF Bourgogne-Franche-Comté and the Comité des vins de Bourgogne.

The data show red Burgundy sales fell 4.1% over the period. White wine sales rose 0.8%, reaching about 117 million bottles, while Crémant de Bourgogne sales increased by more than 7%. Total still wine sales, combining red and white wines, slipped 0.7%.

The split matters beyond Burgundy because the region is one of the most important names in the global premium wine trade. A widening gap between reds, whites and sparkling wines in Burgundy can influence export strategies, pricing decisions and product positioning across the broader beverage sector, especially in high-end wine markets.

The decline in red wine sales is notable because Burgundy has long been seen as more insulated than many other French wine regions from the broader slowdown in wine consumption. The figures suggest that even a region associated with scarce supply and strong international demand is now feeling weaker interest in red wine. According to the source data, the drop affects several levels of the appellation hierarchy, including wines that have traditionally attracted collectors and affluent consumers.

That change fits a wider shift in drinking habits in France, where red wine has been losing ground for years, particularly among younger consumers. Lighter styles, white wines and sparkling wines have been performing better than structured reds in many parts of the market. Burgundy’s latest sales figures suggest those preferences are now showing up more clearly in one of France’s most closely watched vineyard regions.

White Burgundy showed more resilience, but the improvement was modest and came with a warning. The Comité des vins de Bourgogne said volume growth was supported in part by price cuts in some markets. In other words, slightly higher sales in bottle numbers do not necessarily mean stronger revenue for producers. On the French domestic market, white Burgundy sales actually fell 2.8%, with exports helping offset the weakness at home.

The main drivers among whites were Chablis, Petit Chablis and regional wines from the Mâconnais, according to the data cited in the report. That suggests Burgundy’s more accessible white appellations are carrying a larger share of demand at a time when buyers appear more cautious on price.

Crémant de Bourgogne continued to outperform the still wine categories. Its sales rose by more than 7% in the 12 months ending September 2026, extending the broader strength seen in sparkling wine. For producers and distributors, that trend is important because Crémant sits at the intersection of premiumization and value. It can benefit when consumers want a traditional-method sparkling wine but are unwilling to pay Champagne prices.

Other indicators point to a market that is slowing but not collapsing. Stocks of still wines were down 3% at the end of September 2026 from a year earlier. At the same time, transactions in bulk AOP wines plunged 68% in September 2026 from September 2025, reflecting very weak trading activity between growers and merchants at the start of the new marketing season.

Supply is also tightening. DRAAF's early estimate puts the 2026 harvest about 30% below normal reference levels. Cellar releases in August were 31.1% below their five-year average. That combination of lower production and lower available supply helps explain why weaker sales do not automatically translate into lower prices.

By the end of September 2026, still wine stocks represented about 15.3 months of sales. That is not a sign of abundance, especially in a region where many appellations are already constrained by limited production. For merchants, importers and restaurant buyers, it means Burgundy may remain expensive and selective even if demand for some categories softens.

Price movements inside the region were also uneven. DRAAF said bulk market prices for Mercurey red rose 18% and Irancy gained 9%, while some Côte-d'Or village appellations moved in the opposite direction. Bulk prices for Gevrey fell about 15%, and Marsannay dropped about 20%. Those are professional transaction prices, not retail shelf prices, but they show that Burgundy cannot be treated as a single market.

The variation from one appellation to another reflects a more fragmented balance between supply and demand. Brand strength, export exposure, vintage conditions and the reputation of individual villages all continue to shape pricing. For the trade, that means broad claims about "Burgundy prices" are becoming less useful than category-by-category analysis.

Exports remain a key support. DRAAF reported that shipments abroad increased in the first eight months of 2026, with favorable momentum in several European countries. Here again, the performance differed by category. Whites and Crémants proved more resilient than reds, underscoring how much international demand is now helping to stabilize the region.

That export dependence also helps explain why weaker French consumption has not produced deep discounting in stores. Producers and négociants can shift volumes across markets where demand and pricing conditions are very different. In a region as internationally exposed as Burgundy, domestic weakness does not necessarily force immediate retail price cuts.

Burgundy’s production profile gives it some protection. White wines account for about 61% of the region’s output, according to the figures cited in the report. That is an advantage at a time when whites and sparkling wines are proving more resilient than reds. Even so, the latest data show that Burgundy is not immune to the same pressures affecting the rest of the wine business: changing consumer tastes, weaker domestic consumption, tighter harvests and increasingly uneven pricing across categories and appellations.