vinetur

Regional Burgundy wines gain market share as high-end labels lose momentum

Sellers drive surge in lower-tier wine trades amid falling grand cru prices and shifting collector strategies

Wednesday, April 9, 2025



Regional Burgundy wines are taking a larger share of the market in early 2025, as collectors and sellers shift focus away from grand and premier cru labels. According to Liv-ex's annual Burgundy Report, published in February, regional Burgundy accounted

for 48.2% of total Burgundy trade volumes so far this year. This marks a significant increase from 39.4% in 2024 and continues a steady rise from previous years.

The change comes amid falling prices for grand cru wines and stagnant prices for premier crus. Over the past six months, grand cru Burgundy prices have declined consistently. Premier cru prices have remained flat but are still down 23.5% compared to March 2020 and nearly 45% below their peak levels. Regional Burgundy prices have been more volatile but have not dropped as sharply. However, they did see a decline in February.

The increase in regional wine trading appears to be driven more by sellers than buyers. Since September 2024, sellers have played a growing role in initiating trades involving regional Burgundy. In February 2025, seller-initiated trades made up nearly 70% of regional Burgundy volume, compared to just under 20% a year earlier. This suggests that stockholders are actively clearing out lower-priced wines from their inventories.

This trend is also reflected in the composition of trade by price tier. The cheapest 20% of Burgundy wines now account for the largest share of trade volume among all price categories so far this year. Despite this, these lower-end wines still represent only a small portion of the total value of Burgundy traded on Liv-ex.

The shift may be part of a broader strategy by collectors and merchants to rebalance their portfolios. With high-end Burgundy facing price pressure and slower demand, sellers may be using regional wines to generate liquidity or make room for new acquisitions. It remains unclear whether this clear-out will significantly impact the overall market, given the relatively low value of regional wines compared to grand and premier crus.

Liv-ex, the global marketplace for the wine trade, tracks real-time transaction data and provides trading services for over 500 wine businesses worldwide. Its platform currently lists £81 million worth of wine and offers logistics support including storage and delivery. The company’s data provides insight into how market participants are responding to changing conditions across different segments of the fine wine market.