

OVERVIEW OF WINES OF BORDEAUX

2025 EDITION



ITS ARTISANS

Women and men, all of them passionate, young and old, château owners and hipsters, entrepreneurs and career changers, timeless and alternative, collective and independent... together they contribute to a more sustainable and equitable society, innovate, and bring their region to life.



4 637 winegrowers
in the PDO.
Average size of estates:
20.4 hectares.



26 cooperatives cellars
and 6 unions and subsidiaries, representing
27% of production (2023 figures).



300 wine merchants
who account for more than two-thirds
of Bordeaux wine sales worldwide.



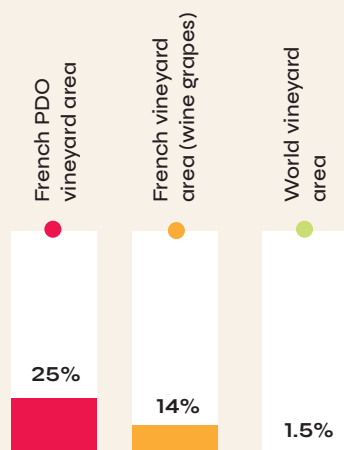
Around 50,000
direct and indirect jobs
generated by the sector.

ITS TERROIR

The Bordeaux vineyard covered **95,000** hectares of PDO vines in 2024. Nearly **4/5** farms in the Gironde have vines. There are **65** Protected Designations of Origin (PDOs) products.

BORDEAUX BY VINEYARD AREA IN 2023

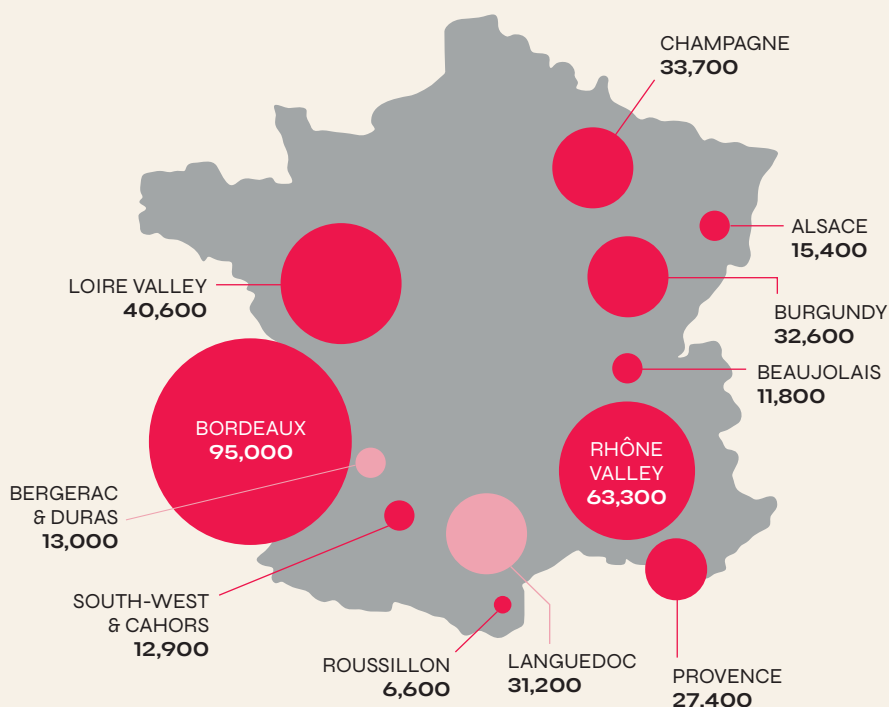
Sources: Customs, Agreste, OIV



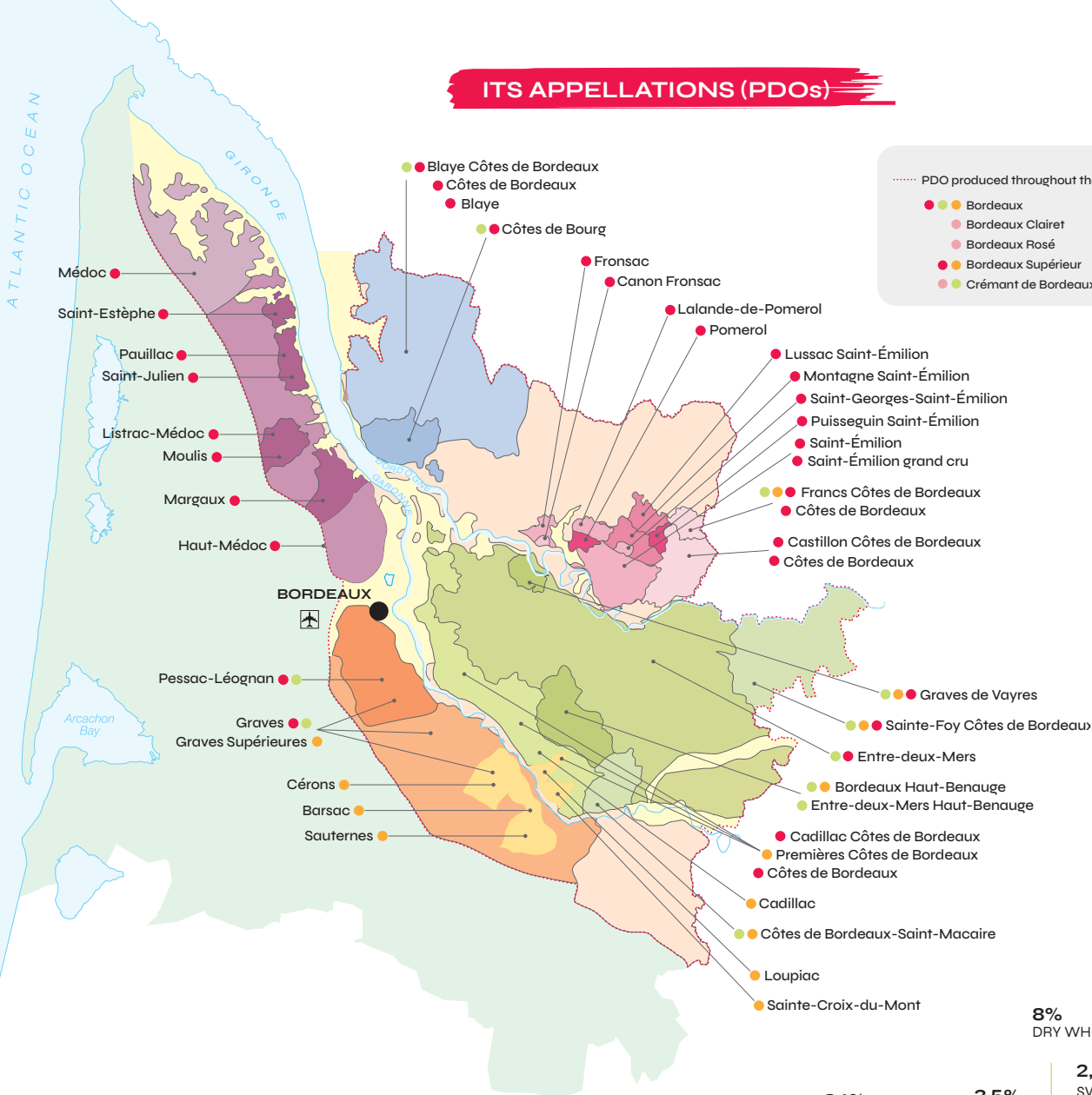
FRENCH PDO VINEYARDS - SURFACE AREA

Sources: Interprofessions & CIVB

● 2023 ● 2024

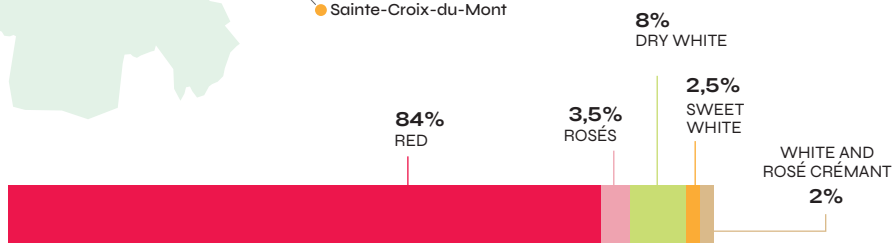


ITS APPELLATIONS (PDOs)



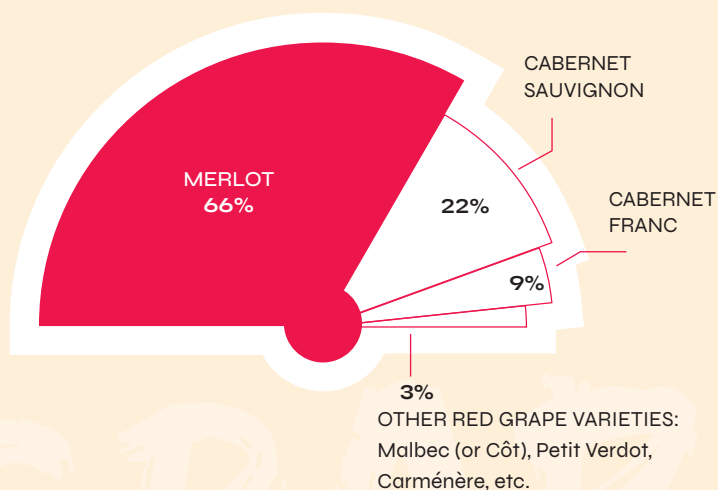
BREAKDOWN OF AREAS BY COLOUR IN 2024

Source: Customs



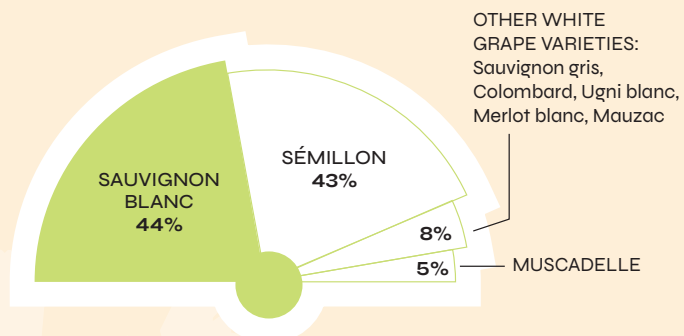
BREAKDOWN OF AREAS BY GRAPE VARIETY IN 2024

Source: Customs



ITS SIGNATURE GRAPE VARIETIES

Blended wines (mix of varieties) or single varietals. Red grape varieties account for the largest proportion of the vineyard (89%) compared with white grape varieties (11%). Bordeaux is the largest Merlot-producing vineyard in the world.



ITS PDO WINES IN ALL COLOURS

Each vintage brings a new challenge: the volume of the harvest depends on the weather conditions, but also, more significantly in recent years, on economic conditions. While 4.4 million hectolitres are harvested on average each year (over the past 10 years), the 2024 vintage is marked by a sharp decline to 3.3 million hectoliters, due to frost, excessive rainfall, and uprooting affecting production.

HISTORY OF BORDEAUX WINE HARVESTS (IN MILLION HECTOLITRES)

Source: Customs



ITS SUSTAINABLE COMMITMENTS AND INITIATIVES

Sources: *Carbone 4 - Bilan Carbone 2019, **Agence Bio

SOCIAL

Helping to make the sector attractive by working to better understand the needs of employees in order to retain them and attract new talent, taking greater account of the arduous nature of jobs and training workers, and improving local employment dynamics.

CSR (Corporate Social Responsibility)

102 companies certified in 2024 as part of the collective Bordeaux Sustainable Impact approach, and a hundred more signed up.

CARBON FOOTPRINT

The 3rd carbon audit of the sector carried out in 2019* recorded 587,000 tCO₂e, i.e. a 39% reduction in emissions between 2007 and 2019.

Aligned with the French National Low-Carbon Strategy and the Paris Agreement, the Bordeaux wine sector is committed to a 54% reduction in emissions by 2030 compared with 2007. The Bordeaux wines 2030 Carbon Plan is based on 5 priorities:

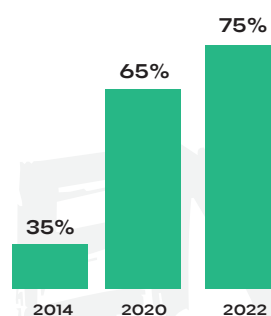
- Glass and packaging
- Viticultural practices (fuel oil, machinery, inputs)
- Freight
- Energy efficiency of buildings and processes
- Capture, storage and utilisation of CO₂

ENVIRONMENT

- Bordeaux brings together a diverse range of properties and production and protection methods. Within this diversity, the best-known environmental labels exist side by side. Some properties have several.
- Today, more than 75% of the Bordeaux vineyard area is certified under an environmental initiative (vs 35% in 2014).
- Nearly 1/4 of the vineyard area is farmed organically (AB) // x3 in 5 years i.e. 1,231 producers on 27,000 hectares certified or in conversion.

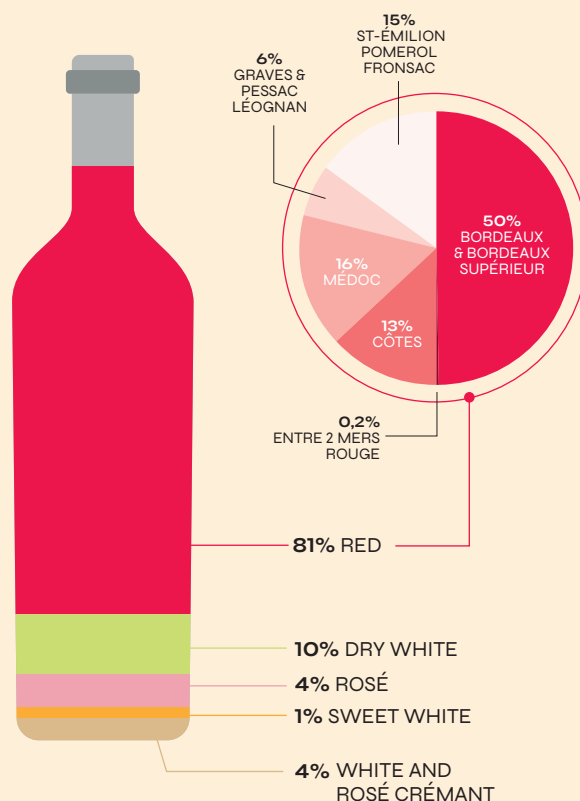
GROWTH OF CERTIFICATION IN THE BORDEAUX VINEYARD

CIVB estimate based on various sources



BREAKDOWN OF PRODUCTION BY COLOUR IN 2024

Source: Customs



ITS SALES

* Sales campaign 01/08/2023 - 31/07/2024 France + export.
Sources: Customs - CIVB

3.6 million hectolitres i.e. the equivalent of
485 million bottles sold in 2023 - 2024* at a value
of nearly €3.4 billion.

SALES IN FRANCE

NO. 1 DESTINATION 2024 SALES REPORT

CIVB estimate based on various sources

42%

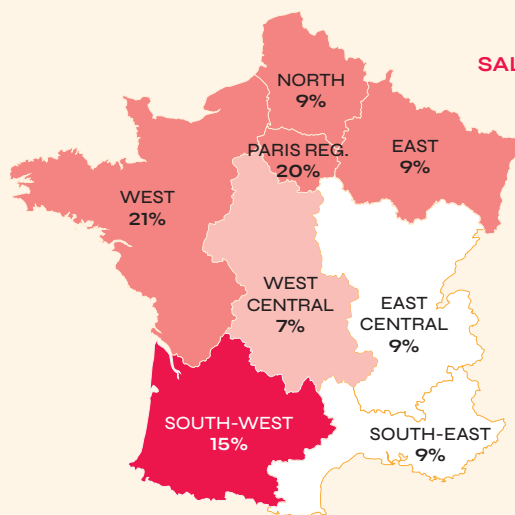
in large retail

(source: Circana)

- Bordeaux remains the No. 1 PDO wine region sold in this channel.
- Bordeaux appellations represent 24% of volume sold and 25% of turnover.
- The average price of a bottle of Bordeaux wine in large retail in 2024 was €6.28
- Bordeaux wine sales by colour: 84% red, 10% white and 6% rosé.

BREAKDOWN OF BORDEAUX WINE SALES BY REGION IN 2024

Source: Kantar - Worldpanel



REGIONAL
CONSUMPTION
INDICES

- 115 AND OVER ●
- 100 TO 114 ●
- 85 TO 99 ●
- UNDER 85 ○

SALES ON EXPORT MARKETS

44%

On-trade
(restaurants, wine
shops, direct sales,
etc.)

14%

Hard discount



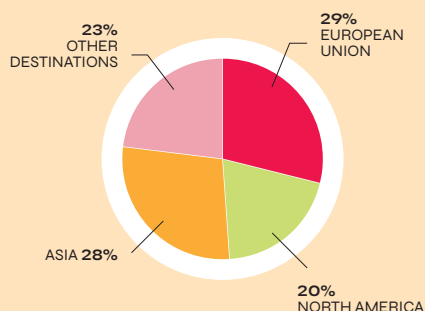
2.04
billion euros



199
million bottles

EXPORTS OF BORDEAUX WINES

Source: Customs 2024



BORDEAUX WINES IN 2024 FRENCH EXPORTS

Source: Customs



No. 1 in French exports of still PDO wines
in volume and value.

BREAKDOWN BY VOLUME

Sources: Customs - CIVB



15

bottles of Bordeaux
wine sold every second
around the world

RANKING OF THE MAIN DESTINATIONS IN 2024 BY VOLUME (in thousand hectolitres)

Source: Douane

* Mainland China + Hong Kong + Macau

