

## Bourgogne's White Wines Drive Market Growth in South Korea



### Key figures for Bourgogne wines in South Korea (first 11 months of 2024)

**12<sup>th</sup> largest export market by value**

**15<sup>th</sup> largest export market by volume**

**Exports:** 1.31 million bottles (+ 10.5% compared to the first 11 months of 2023) for 34.2 million euros (+ 13.1% compared to the first 11 months of 2023)

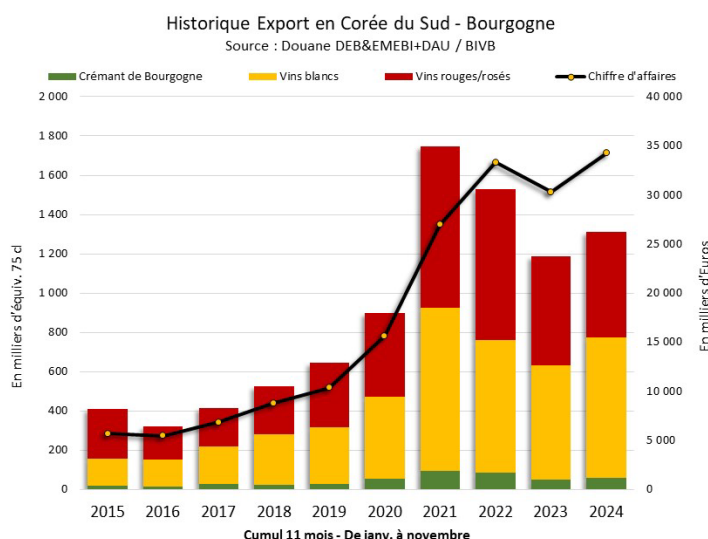
Breakdown by volume	→ Still white wines	55%
	→ Still red/rosés wines	41%
	→ Crémant de Bourgogne	4%

During this period, Bourgogne wines accounted for 19.8% of the volume of French AOC wines exported to South Korea, representing 25% of total revenue. Bourgogne white wines made up 53% of the volume of French AOC white wines exported.

In 2024, the South Korean economy showed signs of recovery. According to OECD forecasts, GDP growth is expected to reach 2.6% by the end of the year, although political and social developments could affect projections for 2025. Good news for Bourgogne wines: while the older population (over 43 years old) primarily consumes beer, the younger generation is increasingly turning to white wine, particularly those made from Chardonnay grapes. This trend likely explains the sharp increase in Bourgogne white wine exports in recent years, with volume up 28% compared to the average for the same 11-month period over the past five years.

### Bourgogne Regains a Foothold in the South Korean Market

After an initial boom in 2007-2008, sales of Bourgogne wines grew gradually until 2018-2019.



The year 2021 was exceptional, with sales of Bourgogne wines nearly doubling compared to 2020. The two subsequent years of decline (2022–2023) were likely a return to normal after the post-COVID surge.

In 2024, exports of Bourgogne wines to South Korea are rebounding, with volume up 10.5%, driven primarily by white wines, which increased by 23% compared to the first 11 months in 2023.

Although representing a smaller share of total volume, Crémant de Bourgogne is also contributing to Bourgogne's recovery in this market, with a 10.5% increase in volume over the same period.

Revenue has reached a new record, exceeding 34 million euros, an increase of 13.1% compared to the first 11 months in 2023.

South Korea accounted for 10% of revenues and 11% of the volume of Bourgogne wines exported to East Asia during this period.

## Régionale AOCs Dominate the Korean Market

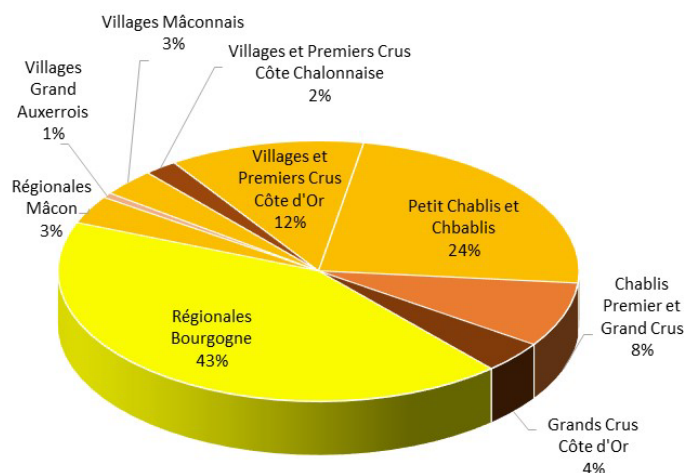
### White wine exports (by volume, for the first 11 months of 2024)

Over the first 11 months of 2024, Bourgogne white wines accounted for 55% of the volume exported to South Korea and 45% of total revenue. Their growth has been significant, with value increasing by 27.2% compared to the same period in 2023.

✓ **The Bourgogne AOC<sup>1</sup>** account for 43% of the volume of white wines, representing 36% of the value, showing a slight increase compared to the 5-year average. This trend is reflected in their growth: up 23.9% in volume and 34.9% in value over the first 11 months of 2023.

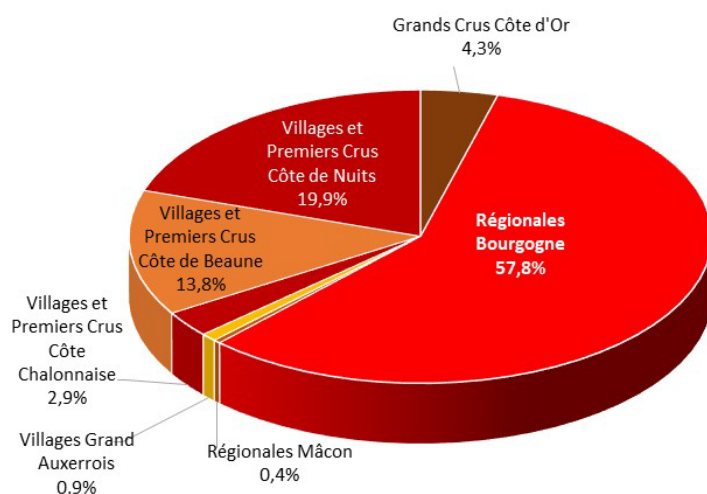
✓ **The AOCs of Chablis**, accounting for 32% of the volume of white wine exports, rank second (21% of the value of white wines). This trend intensified in 2024: the Chablis / Petit Chablis duo saw a volume growth of 63.2% and a revenue increase of 67.3% over the first 11 months of 2023, reaching 2.05 million euros.

✓ **Village and Village Premier Cru AOCs from the Côte d'Or** account for 12% of the exported volume (28% of the value). After a decline in 2023, these AOCs are showing a recovery in volume, with an increase of 17.5% over the first 11 months of 2023, though they remain just below the export volume record set in 2022. The increase in revenue is even more significant, up 39.2% over the same period, reaching more than 4.3 million euros.



**Crémant de Bourgogne** represents 4% of the exported volume. It is seeing growth again after a period of stabilization in 2022-2023, with a 16% increase in volume and a 12.6% rise in revenue over the first 11 months of 2023. It is also the most exported French sparkling AOC wine to South Korea (excluding Champagne), accounting for 29.9% of the volume (up from 17.5% in 2019) and 29.4% of the revenue (up from 21.6% in 2019) of these AOCs during the period.

### Bourgogne red and rosé wine exports (by volume, for the first 11 months of 2024)



**Red wines**, which were relatively well valued in 2024, represented 41% of the volume (a decrease of 3.3% over the first 11 months of 2023) and 54% of the revenue from Bourgogne wines exported (an increase of 3.5% over the same period).

The market is largely dominated by two groups of appellations:

✓ **The Bourgogne AOC<sup>2</sup>** accounted for 58% of Bourgogne red wine volumes, and 30% of the value. After two years of decline in volume for the first 11 months, these wines are back on the path to growth in 2024, with a 16.7% increase in volume and a 5.4% rise in revenue over the first 11 months of 2023.

<sup>1</sup> The *Régionale* AOC Bourgogne white wines include: Bourgogne and Bourgogne plus a geographical denomination

<sup>2</sup> The *Régionale* AOC Bourgogne red/rosé wines include: Bourgogne and Bourgogne plus a geographical denomination

✓ **Village and Village Premier Cru AOCs from the Côte de Beaune and the Côte de Nuits** accounted for 33.7% of Bourgogne red wine volumes and 45.2% of the value. Exports of these wines have declined in volume (-21.9% over the first 11 months of 2023), as well as in revenue (-2.6% over the same period).

## Bourgogne Seizes New Opportunities to Reclaim the Market

In 2024, 12.2 million South Koreans consume wine regularly, at least once every six months. They represent around 30% of the adult population, and 44% of them consume wine every week. According to IWSR, the share of regular consumers has risen by 14% between 2019 and 2024. The proportion of South Koreans with weekly wine consumption is also increasing (+50%).

The medium-term consumption outlook seems positive, especially as younger consumers are increasing the number of regular drinkers, particularly for white wines made from Chardonnay (+14% consumption between 2019 and 2023).

This trend is very favorable for Bourgogne white wines (61% of the production). Growth is expected to continue in the long term, as 29% of the population most engaged in wine consumption will likely be dominated by younger generations (43% Millennials and 20% Gen Z).

Meanwhile, Bourgogne benefits from the strong performance of "Off-trade" distribution channels. These dominate in South Korea, representing 78% of wine purchases, or nearly 48 million bottles in 2023. They have experienced strong growth since the end of Covid, with an increase of 24.8% (2023 compared to 2019). It is the more specialized and smaller stores, where Bourgogne wines are most present, that are driving the growth of "Off-trade."

The "On-trade" channel (22% of wine purchases) slowed down in 2023 (-7.4% compared to 2019). Although Bourgogne wines are present in this sector, restaurants are more inclined to serve traditional meals dominated by beer and sake, as are bars, pubs, and clubs.

Two other trends are boosting sales of Bourgogne wines:

- Purchases of Premium and Super-Premium still wines (37% of purchases) have shown the strongest volume growth since Covid, with an increase of 52% between 2023 and 2019.
- An increase in the frequency of wine consumption and wine spending at professional events over the long term.

*Economic report written by the Markets and Development Unit - BIVB – January 2025*

*(Sources: Customs DEB&EMEBI+DAU - IWSR - BIVB)*

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