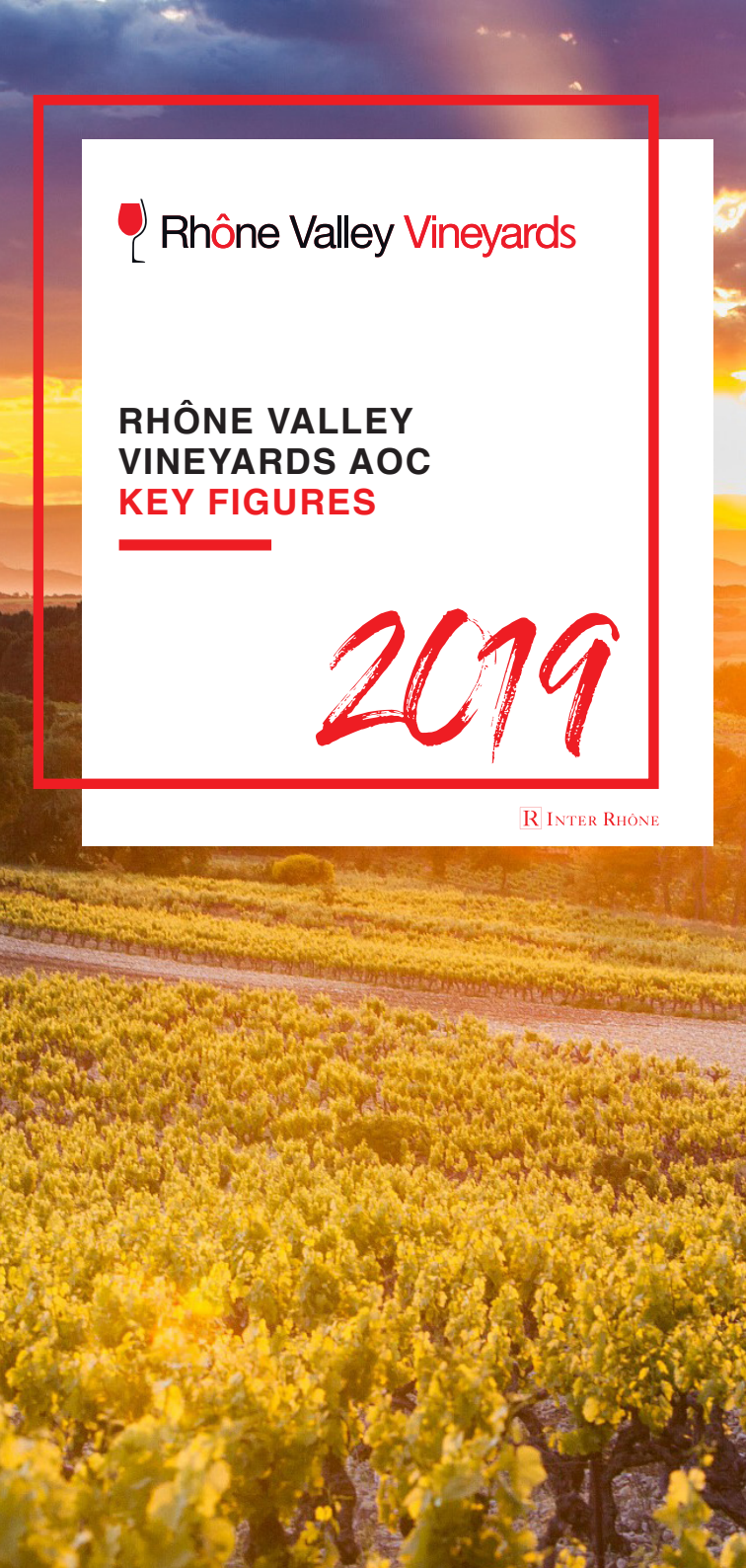
Rhône Valley Vineyards

RHÔNE VALLEY VINEYARDS AOC KEY FIGURES

2019

INTER RHÔNE



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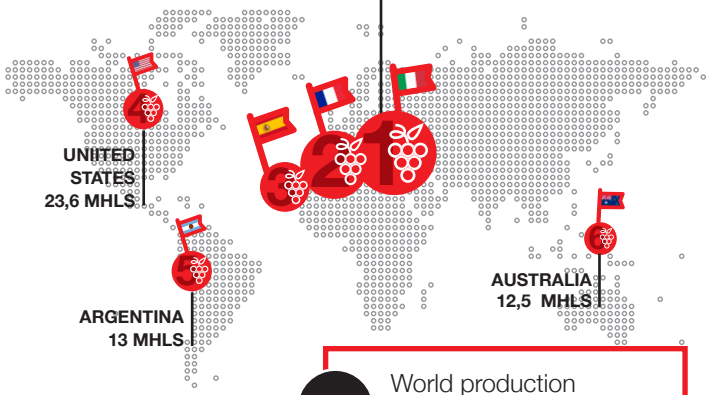
RHONE VALLEY VINEYARDS AOC WINES PRODUCTION

WORLD WINE PRODUCTION

Source: OIV 2019



ITALY 46,6 MHLS
FRANCE 41,9 MHLS
SPAIN 34,3 MHLS



UNITED STATES 23,6 MHLS

ARGENTINA 13 MHLS

AUSTRALIA 12,5 MHLS

World production **estimated at 263 MHls** in 2019, i.e. -7%

RHÔNE VALLEY VINEYARDS IN FRANCE IN 2019

Source: French interprofessional wine bodies



CHAMPAGNE *
33 800 ha / 2 338 000 hl

ALSACE
15 623 ha / 1 028 705 hl

BURGUNDY AND BEAUJOLAIS *
45 000 ha / 2 350 000 hl

AOC VAL DE LOIRE
47 260 ha / 2 065 794 hl

BORDEAUX
111 393 ha / 4 892 783 hl

BERGERAC / DURAS *
11 747 ha / 343 801 hl

SOUTHWEST *
15 053 ha / 721 727 hl

RHÔNE VALLEY VINEYARDS
67 628 ha / 2 796 392 hl

PROVENCE
27 464 ha / 1 280 887 hl

LANGUEDOC *
36 000 ha / 1 418 197 hl

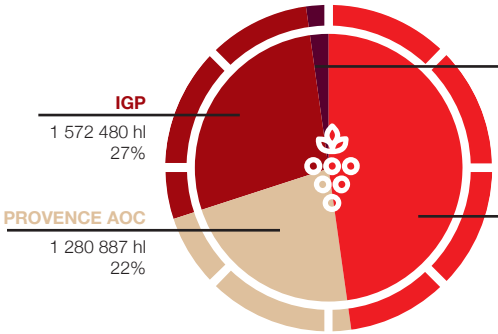
ROUSSILLON
17 440 ha / 504 364 hl

IGP OC *
107 000 ha / 6 920 000 hl

* Data : production 2018

RHONE VALLEY VINEYARDS WITHIN THE REGIONAL PRODUCTION AREA

Sources : French interprofessional wines bodies, France Agrimer.
Production 2019



WINES WITHOUT GEOGRAPHICAL INDICATION
95 567 hl
2%

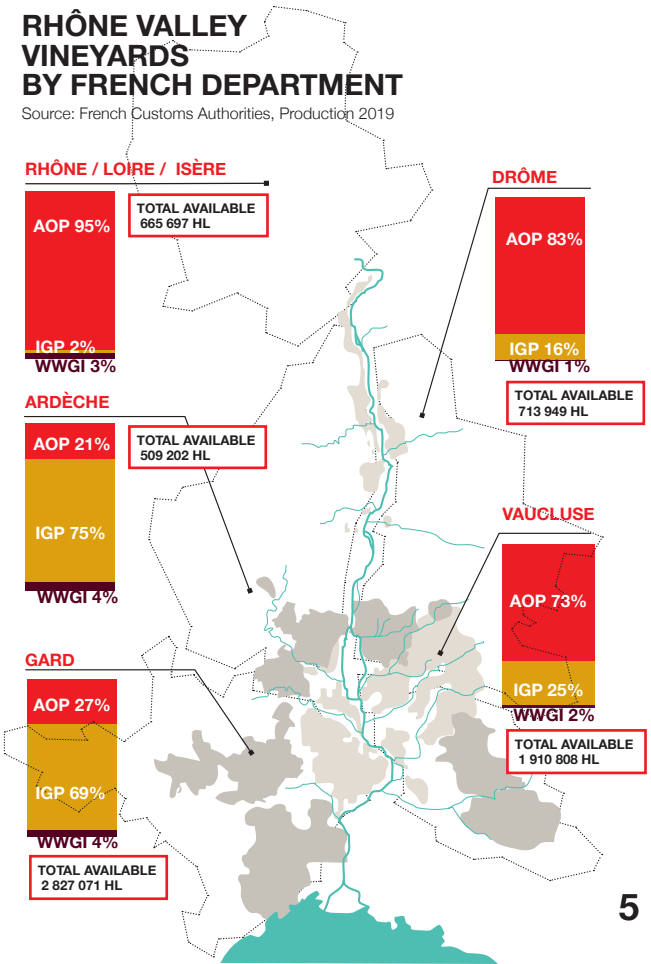
IGP
1 572 480 hl
27%

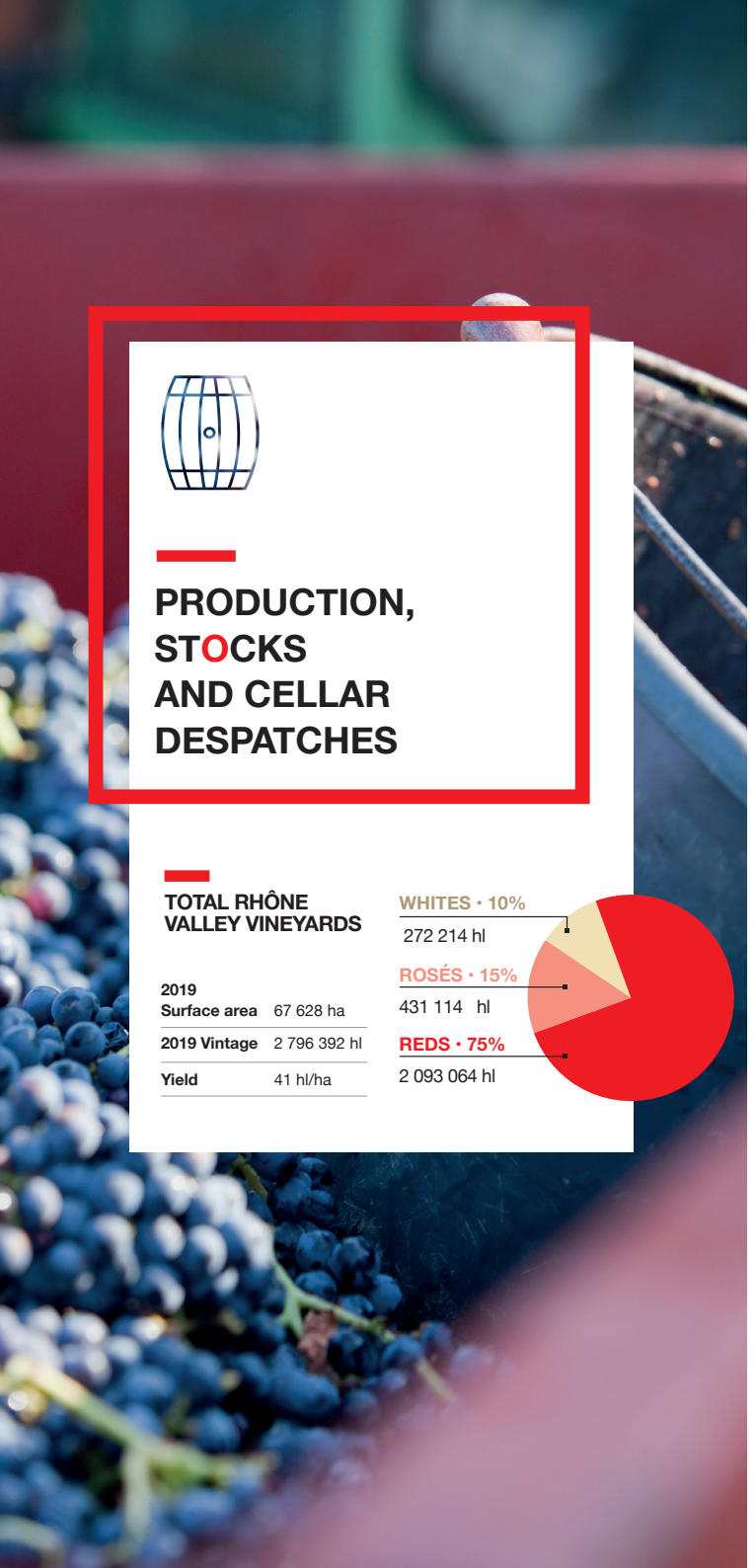
RHÔNE VALLEY VINEYARDS AOC
2 796 392 hl
49%

PROVENCE AOC
1 280 887 hl
22%

RHÔNE VALLEY VINEYARDS BY FRENCH DEPARTMENT

Source: French Customs Authorities, Production 2019





PRODUCTION, STOCKS AND CELLAR DESPATCHES

TOTAL RHÔNE VALLEY VINEYARDS

2019	
Surface area	67 628 ha
2019 Vintage	2 796 392 hl
Yield	41 hl/ha

RHÔNE VALLEY VINEYARDS PRODUCTION IN 2019

Sources: DR, DREV, producers unions - Inter Rhône 2019 (except Chateauneuf du Pape)

in hl	2019 Surface Area	2019 Vintage	Yield	REDS		ROSÉS		WHITES	
Côtes du Rhône	**30 281**	**1 332 125**	**44**	**1 144 875**	**86%**	**112 668**	**8%**	**74 583**	**6%**
Côtes du Rhône Villages	**9 152**	**337 197**	**37**	**324 462**	**96%**	**2 493**	**1%**	**10 242**	**3%**
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	2 923	112 412	38	110 285	98,1%	318	0,3%	1 809	1,6%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	6 229	224 785	36	214 177	95%	2 175	1%	8 433	4%
SOUTHERN CRUS	**7 801**	**240 590**	**31**	**198 075**	**82%**	**32 145**	**13%**	**10 370**	**4%**
Beaumes-de -Venise	675	21 433	32	21 433	100%				
Cairanne	865	29 075	34	27 603	95%			1 471	5%
Gigondas	1 199	36 047	30	35 798	99%	249	1%		
Lirac	857	21 004	25	18 262	87%	692	3%	2 050	10%
Rasteau	951	32 299	34	32 299	100%				
Tavel	898	29 868	33			29 868	100%		
Vacqueyras	1 440	45 971	32	43 385	94%	498	1%	2 088	5%
VDN Muscat de B-D-V	332	5 560	17	86	2%	720	13%	4 754	85%
VDN Rasteau	15	391	26	266	68%	119	30%	7	2%
Vinsobres	570	18 943	33	18 943	100%				
NORTHERN CRUS	**4 044**	**141 359**	**35**	**114 242**	**81%**			**27 118**	**19%**
Château-Grillet	3	62	18					62	100%
Condrieu	203	7 442	37					7 442	100%
Cornas	156	5 128	33	5 128	100%				
Côte-Rôtie	323	12 121	38	12 121	100%				
Crozes-Hermitage	1 778	57 936	33	50 358	87%			7 578	13%
Hermitage	140	4 885	35	3 319	68%			1 566	32%
Saint-Joseph	1 348	50 203	37	43 315	86%			6 888	14%
Saint-Péray	92	3 582	39					3 582	100%
Other Rhone Valley AOC wines	**16 349**	**745 120**	**46**	**311 410**	**42%**	**283 808**	**38%**	**149 901**	**20%**
Clairette de Bellegarde	7	263	36					263	100%
Clairette de Die	1 638	86 282	53					86 282	100%
Châtillon-en-Diois	43	1 898	44	586	31%	288	15%	1 025	54%
Coteaux de Die	1,5	58	40					58	100%
Crémant de Die	20	1 071	53					1 071	100%
Costières de Nîmes	3 680	177 594	48	88 757	50%	76 138	43%	12 699	7%
Côtes du Vivarais	232	8 819	38	4 710	53%	3 537	40%	573	7%
Duché d'Uzès	322	10 642	33	5 884	55%	2 129	20%	2 629	25%
Grignan-les-Adhémar	1 318	51 797	39	39 047	75%	7 075	14%	5 676	11%
Luberon	3 397	154 454	45	35 436	23%	93 917	61%	25 101	16%
Ventoux	5 691	252 240	44	136 990	54%	100 726	40%	14 524	6%

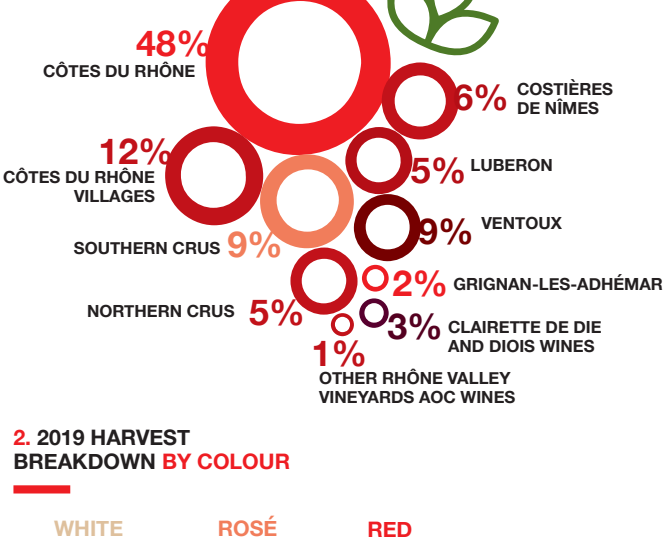
2019 Vintage (pure alcohol)	
SPIRITS WITH GEOGRAPHICAL INDICATION	**87**
Eau-de-vie de marc des Côtes du Rhône	81
Eau-de-vie de vin des Côtes du Rhône	6

RHÔNE VALLEY VINEYARDS PRODUCTION IN 2019

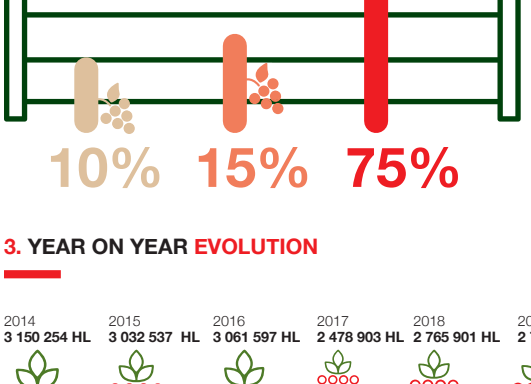


Sources : DR, DREV, producers unions - Inter Rhône 2019 (except Chateauneuf du Pape)

1. 2019 HARVEST BREAKDOWN BY AOC



2. 2019 HARVEST BREAKDOWN BY COLOUR



3. YEAR ON YEAR EVOLUTION

PRODUCTION BY APPELLATION : YEAR ON YEAR EVOLUTION

Sources : DR, DREV, producers unions - Inter Rhône 2019 (except Chateauneuf du Pape)

in hl	Vintage					
	2014 Vintage	2015 Vintage	2016 Vintage	2017 Vintage	2018 Vintage	2019 Vintage
Total Rhone Valley Vineyards	**3 150 254**	**3 032 537**	**3 061 597**	**2 478 903**	**2 765 901**	**2 796 392**
Côtes du Rhône	**1 548 227**	**1 412 064**	**1 472 035**	**1 178 321**	**1 280 240**	**1 332 125**
Côtes du Rhône Villages	**357 263**	**379 145**	**338 452**	**305 259**	**316 266**	**337 197**
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	127 812	142 385	125 973	107 273	108 427	112 412
CDR VILLAGES WITH A GEOGRAPHICAL NAME	229 451	236 760	212 479	197 986	207 839	224 785
SOUTHERN CRUS	**245 862**	**235 543**	**257 471**	**209 696**	**231 351**	**240 590**
Beaumes-de-Venise	24 278	23 046	21 747	19 842	21 425	21 433
Cairanne*			30 194	23 813	23 020	29 075
Gigondas	43 755	40 884	37 101	31 157	34 512	36 047
Lirac	22 149	24 601	24 370	17 084	23 864	21 004
Rasteau	34 119	33 541	33 494	27 498	28 746	32 299
Tavel	39 391	35 314	37 778	26 527	36 779	29 868
Vacqueyras	52 697	47 846	45 620	38 817	40 747	45 971
VDN Muscat de B-D-V	9 031	8 690	6 617	5 234	5 736	5 560
VDN Rasteau	845	1 022	638	208	162	391
Vinsobres	19 597	20 599	19 912	19 516	16 361	18 943
NORTHERN CRUS	**138 615**	**149 583**	**162 007**	**147 764**	**161 373**	**141 359**
Château-Grillet	25	27	62	39	61	62
Condrieu	6 459	6 264	7 443	6 089	8 388	7 442
Cornas	4 635	4 837	5 236	4 369	4 918	5 128
Côte-Rôtie	9 460	11 448	12 606	11 823	12 763	12 121
Crozes-Hermitage	66 475	73 546	80 314	71 581	75 918	57 936
Hermitage	3 824	5 340	3 292	4 594	5 156	4 885
Saint-Joseph	44 992	45 239	49 781	46 467	51 111	50 203
Saint-Péray	2 745	2 882	3 273	2 802	3 057	3 582
Other Rhone Valley AOC wines	**860 288**	**856 202**	**831 632**	**637 863**	**776 671**	**745 120**
Clairette de Bellegarde	284	320	287	287	269	263
Clairette de Die **	93 769	96 343	93 332	45 735	94 254	86 282
Châtillon-en-Diois**	1 751	1 891	1 693	534	2 035	1 898
Coteaux de Die**	52	51	48	52	55	58
Crémant de Die**	2 398	2 761	3 010	473	1 719	1 071
Costières de Nîmes	221 804	238 769	221 215	199 880	211 751	177 594
Côtes du Vivarais	12 388	9 789	10 210	9 023	10 948	8 819
Duché d'Uzès	9 584	11 266	10 766	10 623	10 336	10 642
Grignan-les-Adhémar	57 507	58 299	65 492	42 446	48 639	51 797
Luberon	169 011	164 021	156 001	136 278	151 391	154 454
Ventoux	291 740	272 692	269 578	192 532	245 273	252 240

* became vintage in 2016
** entry into the Interprofession in January 2019

RHÔNE VALLEY AOC WINES SALES IN 2018/2019

Sources : DRM, SV12, Interprofessional contracts - Inter Rhône 2019 (except Chateauneuf du Pape)

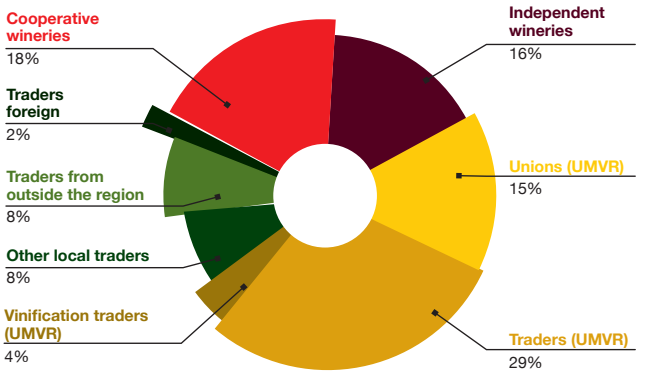
1. ENTITIES SELLING RHÔNE VALLEY AOC WINES

	INDEPENDENT WINERIES	COOPERATIVE WINERIES	TRADING COMPANIES PRODUCERS UNIONS VINIFICATION COMPANIES
Côtes du Rhône	895	57	258
Côtes du Rhône villages	480	43	122
Crus des Côtes du Rhône	653	24	199
Costières de Nîmes - Clairette de Bellegarde	79	11	66
Côtes du Vivarais	17	3	7
Duché d'Uzès	38	8	2
Grignan les Adhémar	35	10	25
Luberon	66	10	41
Ventoux	154	15	73
Clairette de Die and Diois wines	24	2	5
Total Rhône Valley AOC Wines	1 727	91	392

2. BREAKDOWN OF RHÔNE VALLEY AOC WINE CELLAR DESPATCHES BY PRODUCTION ENTITY



3. BREAKDOWN OF RHÔNE VALLEY AOC WINE VOLUME BY SALES ENTITY



PHYSICAL STOCKS OF RHÔNE VALLEY AOC WINES IN 2019/2020

Physical stocks at 31 July 2019, Sources: DAI/DS, DS négoce (except Chateauneuf du Pape)

in hl	PRODUCTION STOCKS		TRADERS STOCKS	
	Volume (in hl)	Evolution in %	Volume (in hl)	Evolution in %
TOTAL RHÔNE VALLEY VINEYARDS	**2 148 060**		**891 447**	
TOTAL CÔTES DU RHÔNE	**1 526 286**		**719 594**	
Côtes du Rhône	779 371	+3%	406 743	-6%
Côtes du Rhône Villages	331 387		103 605	
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	102 798	-4%	60 504	-2%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	228 589	=	43 101	+6%
SOUTHERN CRUS	**286 805**		**81 532**	
Beaumes-de-Venise	26 918	-7%	4 956	+26%
Cairanne	28 912	-1%	12 403	+7%
Gigondas	45 512	-6%	22 399	-4%
Lirac	33 726	+9%	3 779	+14%
Rasteau	37 344	+6%	11 868	-9%
Tavel	10 787	+48%	5 941	+17%
Vacqueyras	49 297	-10%	14 932	-12%
Vinsobres	32 363	+1%	4 120	-1%
VDN Muscat de B-D-V	19 806	-7%	923	+142%
VDN Rasteau	2 139	-18%	211	-26%
NORTHERN CRUS	**128 723**		**127 714**	
Château-Grillet	92	=	-	-
Condrieu	2 996	+26%	7 939	+35%
Cornas	5 642	+5%	6 297	+11%
Côte-Rôtie	14 183	+9%	15 184	+4%
Crozes-Hermitage	62 491	+4%	44 630	+3%
Hermitage	5 735	+7%	12 942	+29%
Saint-Joseph	35 181	+2%	38 091	+5%
Saint-Péray	2 403	+7%	2 631	+31%
OTHER RHONE VALLEY AOC WINES	**621 774**		**171 853**	
Clairette de Bellegarde	515	+4%		-
Clairette de Die	96 035	+24%	32 849	-
Châtillon-en-Diois	1 818	+51%	216	-
Coteaux de Die	97	+17%	-	-
Crémant de Die	5 953	=	2 311	-
Costières de Nîmes	177 206	+5%	28 785	+12%
Côtes du Vivarais	9 045	+34%	2 438	+22%
Duché d'Uzès	10 164	+27%	1 682	+10%
Grignan-les-Adhémar	51 150	-1%	10 851	+13%
Luberon	104 728	+27%	40 523	+106%
Ventoux	165 064	+8%	52 198	+9%

RHÔNE VALLEY AOC WINE CELLAR DESPATCHES 2018/2019

Sources : DRM, SV12 - Inter Rhône (except Chateauneuf du Pape)

1. BREAKDOWN OF CELLAR DESPATCHES BY COLOUR



2. BREAKDOWN OF CELLAR DESPATCHES BY TYPE



BULK

62%

1 654 979 hl

of which:

60% Côtes du Rhône

9% Côtes du Rhône Villages

8% Ventoux



PACKAGED

33%

868 276 hl

of which:

32% Côtes du Rhône

16% Southern Crus

11% Côtes du Rhône Villages



FRESH GRAPES

5%

127 535 hl

of which:

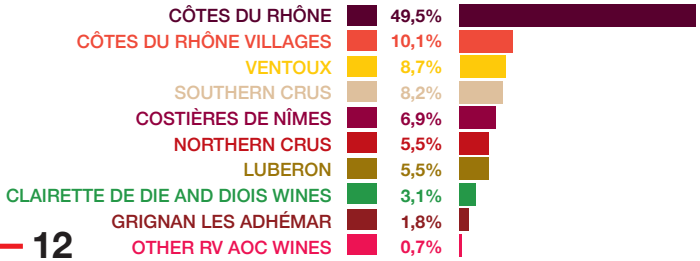
31% Northern Crus

30% Côtes du Rhône

12% Other Rhone Valley AOC wines

10% Côtes du Rhône Villages

3. BREAKDOWN OF CELLAR DESPATCHES BY AOC



RHÔNE VALLEY AOC WINE CELLAR DESPATCHES 2018/2019

Sources : DRM, SV12 - Inter Rhône 2019 (except Chateauneuf du Pape)

In hl	Bulk	Packaged	Fresh grapes	Other despatches	Total Cellar despatches
TOTAL RHÔNE VALLEY VINEYARDS	**1 654 979**	**868 276**	**127 535**	**11 860**	**2 662 650**
TOTAL CÔTES DU RHÔNE (REG, VILL AND CRUS)	**1 245 732**	**591 120**	**104 053**	**9 308**	**1 950 213**
Côtes du Rhône	**992 835**	**278 906**	**38 847**	**3 932**	**1 314 519**
Côtes du Rhône Villages	**154 757**	**98 140**	**13 117**	**3 540**	**269 555**
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	88 933	22 095	9 639	907	121 574
CDR VILLAGES WITH A GEOGRAPHICAL NAME	65 824	76 045	3 479	2 633	147 981
TOTAL SOUTHERN CRUS	**71 725**	**133 935**	**12 021**	**1 007**	**218 688**
Beaumes-de-Venise	3 933	17 972	930	32	22 866
Cairanne	9 129	8 802	2 246	48	20 224
Gigondas	14 284	15 827	3 503	217	33 829
Lirac	4 378	12 089	-	96	16 563
Rasteau	9 597	16 002	1 131	103	26 833
Tavel	12 449	19 720	1 033	44	33 247
Vacqueyras	12 037	30 296	2 579	95	45 008
VDN Muscat de B-D-V	595	6 749	30	47	7 421
VDN Rasteau	-	580	-	81	661
Vinsobres	5 324	5 898	569	246	12 036
TOTAL NORTHERN CRUS	**26 415**	**80 139**	**40 068**	**829**	**147 451**
Château-Grillet	-	-	-	-	-
Condrieu	1 027	1 635	4 904	60	7 627
Cornas	390	2 368	1 794	50	4 603
Côte-Rôtie	1 981	3 947	4 888	96	10 912
Crozes-Hermitage	10 904	44 428	13 556	244	69 132
Hermitage	593	1 132	2 144	28	3 897
Saint-Joseph	11 391	25 269	11 384	318	48 362
Saint-Péray	128	1 361	1 397	33	2 919
TOTAL OTHER RHONE VALLEY AOC WINES	**409 247**	**277 157**	**23 482**	**2 552**	**712 438**
Clairette de Bellegarde	-	214	-	-	214
Clairette de Die*	11 885	58 030	14 761	54	84 730
Châtillon en Diois*	111	1 475	45	3	1 634
Coteaux de Die*	-	47	-	2	49
Crémant de Die*	20	2 039	226	14	2 299
Costières de Nîmes	119 093	64 780	-	615	184 488
Côtes du Vivarais	5 248	2 109	124	144	7 625
Duché d'Uzès	899	5 676	-	158	6 733
Grignan Les Adhémar	23 867	22 413	-	630	46 909
Luberon	114 445	31 908	-	337	146 690
Ventoux	133 679	88 466	8 326	596	231 066

*Data in calendar years

EVOLUTION OF RHÔNE VALLEY AOC WINES CELLAR DESPATCHES

Sources : DRM, SV12, Inter-Rhône 2019 (excluding Chateauneuf du Pape production, and non-AOC wine)

In hl	Campaign					
	2014 / 2015	2015 / 2016	2016 / 2017	2017/ 2018	2018/ 2019	Evol N-1
TOTAL RHONE VALLEY VINEYARDS	**2 858 593**	**2 781 871**	**2 764 921**	**2 818 187**	**2 662 650**	**-6%**
TOTAL CÔTES DU RHÔNE (REG, VILL AND CRUS)	**2 076 892**	**2 064 221**	**2 040 180**	**2 084 971**	**1 950 213**	**-6%**
Côtes du Rhône	**1 422 777**	**1 406 609**	**1 366 031**	**1 414 621**	**1 314 519**	**-7%**
Côtes du Rhône Villages	**295 139**	**305 457**	**285 718**	**290 060**	**269 555**	**-7%**
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	133 886	151 188	154 820	141 561	121 574	-14%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	161 253	154 269	130 898	148 499	147 981	=
TOTAL SOUTHERN CRUS	**205 298**	**206 746**	**233 250**	**228 248**	**218 688**	**-4%**
Beaumes-de-Venise	18 254	19 629	21 597	20 780	22 866	+10%
Cairanne			14 028	17 960	20 224	+13%
Gigondas	36 282	36 289	39 645	37 844	33 829	-11%
Lirac	18 374	18 501	17 554	18 036	16 563	-8%
Rasteau	30 449	30 833	33 394	32 343	26 833	-17%
Tavel	37 228	34 193	37 200	31 412	33 247	+6%
Vacqueyras	39 934	42 081	46 666	47 932	45 008	-6%
VDN Muscat de B-D-V	9 221	8 662	7 671	7 537	7 421	-2%
VDN Rasteau	823	794	984	533	661	+24%
Vinsobres	14 733	15 764	14 510	13 871	12 036	-13%
TOTAL NORTHERN CRUS	**153 678**	**145 410**	**155 181**	**152 042**	**147 451**	**-3%**
Château-Grillet						
Condrieu	6 089	6 255	7 451	6 211	7 627	+23%
Cornas	4 449	4 363	5 302	5 001	4 603	-8%
Côte-Rôtie	9 500	10 576	10 884	11 916	10 912	-8%
Crozes-Hermitage	76 691	70 314	74 852	70 485	69 132	-2%
Hermitage	4 615	5 007	3 400	4 256	3 897	-8%
Saint-Joseph	49 548	46 166	50 405	51 284	48 362	-6%
Saint-Péray	2 737	2 699	2 858	2 889	2 919	+1%
TOTAL OTHER RHÔNE VALLEY AOC WINES	**781 701**	**717 650**	**724 741**	**733 216**	**712 438**	**-3%**
Clairette de Bellegarde	247	202	218	181	214	+18%
Clairette de Die**	83 158*	81 250*	78 255*	77 948*	84 730	+9%
Châtillon en Diois**	1 158*	1 387*	1 511*	833*	1 634	+96%
Coteaux de Die**	49*	44*	48*	49*	49	=
Crémant de Die**	1 620*	1 725*	2 002*	1 508*	2 299	+52%
Costières de Nîmes	228 829	184 801	196 381	185 629	184 488	-1%
Côtes du Vivarais	10 535	9 868	10 360	10 260	7 625	-26%
Duché d'Uzès	6 030	8 054	7 810	6 831	6 733	-1%
Grignan-les-Adhémar	56 593	53 758	46 073	50 345	46 909	-7%
Luberon	153 542	139 754	139 988	148 060	146 690	-1%
Ventoux	239 940	236 806	242 096	251 572	231 066	-8%

* Source : producers union. Data from producers and wine traders • ** Data in calendar years



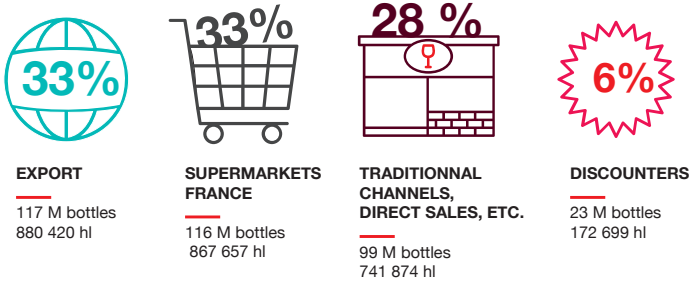
SALES AND EXPORTS

SALES OF RHÔNE VALLEY AOC WINES BY DISTRIBUTION CHANNEL

Sources: IRI panels, Kantar, French Customs Authorities, Inter Rhône research
Still wines and sparkling wines

1. BREAKDOWN OF RHÔNE VALLEY AOC WINE SALES BY DISTRIBUTION CHANNEL IN 2019

(by volume, in millions of bottles.
Sources : IRI, Kantar, French Customs Authorities, Inter Rhône estimates)



EXPORT
117 M bottles
880 420 hl

SUPERMARKETS FRANCE
116 M bottles
867 657 hl

TRADITIONNAL CHANNELS, DIRECT SALES, ETC.
99 M bottles
741 874 hl

DISCOUNTERS
23 M bottles
172 699 hl

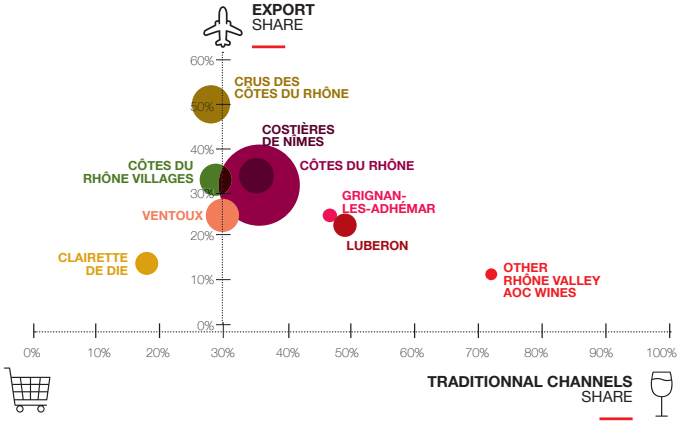
2. MAIN EXPORT MARKETS IN 2019

(in volume, sources : French Customs Authorities, Inter Rhône estimates)





3. RHÔNE VALLEY AOC WINE SALES COMPARISON



SALES OF RHÔNE VALLEY AOC WINES BY DISTRIBUTION CHANNEL

Sources: IRI panels, Kantar, French Customs Authorities, Inter Rhône research

ESTIMATED BREAKDOWN OF RHÔNE VALLEY AOC WINE SALES BY DISTRIBUTION CHANNEL

in volume	Super-markets/ discounters	Trad channels, direct sales and others	Export	Reference Volume in hl	Source
Côtes du Rhône	34%	36%	30%	1 314 519	Estimation IR 2019
Côtes du Rhône Villages	32%	32%	36%	269 555	Estimation IR 2019
Beaumes-de-Venise	48%	43%	9%	22 866	Etude de Flux IR 2016
Condrieu	6%	71%	23%	7 627	Etude de Flux IR 2017
Cornas	8%	59%	33%	4 603	Etude de Flux IR 2017
Côte-Rôtie	9%	70%	21%	10 912	Etude de Flux IR 2017
Crozes-Hermitage	22%	58%	20%	69 132	Etude de Flux IR 2017
Gigondas	26%	42%	32%	33 829	Etude de Flux IR 2016
Hermitage	8%	43%	49%	3 897	Etude de Flux IR 2017
Lirac	10%	42%	48%	16 563	Etude de Flux IR 2015
Rasteau	34%	37%	29%	26 833	Etude de Flux IR 2017
Saint-Joseph	22%	68%	10%	48 362	Etude de Flux IR 2016
Saint-Péray	6%	75%	19%	2 919	Etude de Flux IR 2017
Tavel	45%	20%	35%	33 247	Etude de Flux IR 2015
Vacqueyras	24%	44%	32%	45 008	Etude de Flux IR 2016
Vinsobres	23%	39%	38%	12 036	Etude de Flux IR 2018
VDN Muscat de B-D-V	46%	36%	18%	7 421	Etude de Flux IR 2016
VDN Rasteau	9%	78%	13%	661	Etude de Flux IR 2017
Costières de Nîmes	35%	24%	41%	184 488	Etude de Flux IR 2018
Duché d'Uzès	10%	75%	15%	6 733	Etude de Flux IR 2018
Grignan-les-Adhémar	19%	55%	26%	46 909	Etude de Flux IR 2018
Luberon	36%	41%	23%	146 690	Etude de Flux IR 2016
Ventoux	45%	31%	24%	231 066	Etude de Flux IR 2018
Clairette de Die	68%	17%	15%	84 730	Estimation IR 2019

BREAKDOWN OF RHÔNE VALLEY AOC WINE EXPORTS 2019 BY COUNTRY

In volume	United Kingdom	Belgium	USA	China	Canada	Germany	Sweden	The Netherlands	Switzerland	Denmark	Japan	Others countries
Côtes du Rhône	16%	15%	18%	7%	6%	5%	10%	2%	3%	3%	2%	13%
Côtes du Rhône Villages	34%	16%	16%	5%	5%	4%	2%	3%	2%	3%	2%	8%
Southern Crus	17%	19%	18%	3%	6%	7%	3%	3%	8%	4%	1%	11%
Northern Crus	19%	12%	28%	4%	5%	3%	4%	2%	6%	1%	3%	13%
Costières de Nîmes	13%	8%	18%	34%	7%	6%	1%	2%	2%	2%	2%	5%
Grignan les Adhémar	5%	8%	2%	56%	1%	9%	0,04%	6%	2%	0,4%	3%	7%
Luberon	14%	29%	7%	3%	12%	22%	1%	2%	1%	1%	1%	7%
Ventoux	6%	22%	8%	6%	28%	9%	1%	3%	2%	5%	2%	8%
Clairette and Crémant de Die	0%	53%	1%	1%	1%	4%	1%	1%	29%	0%	7%	2%

THE FRENCH MARKET : SALES OF RHÔNE VALLEY AOC WINES IN THE SUPERMARKET CHANNEL

Source: IRI Panels excluding Discounters
Still wines only



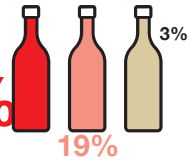
BREAKDOWN BY CHANNEL

HM/SM
748 806 HL

PROXIMITY STORES
49 395HL

CLICK & COLLECT
15 396 HL

BREAKDOWN BY COLOUR



BIB :
32 %
OF VOLUME

HYPER/SUPERMARKETS IN 2019*

	ND **	"VOLUME (IN HL)"	VOLUME EVOLUTION	AVG PRICE €/BOTTLE INC VAT	AVG PRICE EVOLUTION
Côtes du Rhône	100	391 483	-11,3%	3,41 €	+2,2%
Côtes du Rhône Villages	98	78 447	-2,8%	4,80 €	+2,1%
Beaumes-de-Venise	79	10 867	+6,9%	7,08 €	=
Condrieu	13	278	+1,0%	28,72 €	+2,3%
Cornas	14	329	-6,7%	21,85 €	+3,3%
Côte-Rôtie	26	900	-6,0%	31,24 €	+1,7%
Crozes-Hermitage	84	14 843	+1,6%	9,52 €	+4,8%
Gigondas	75	6 313	-14,0%	11,97 €	+4,8%
Hermitage	6	130	+10,4%	32,58 €	+1,6%
Lirac	20	1 368	-2,2%	6,93 €	+4,0%
Rasteau	74	8 846	-5,5%	7,00 €	+3,1%
Saint-Joseph	66	8 721	-2,5%	11,63 €	+4,3%
Saint-Péray	3	133	-17,2%	10,89 €	+3,7%
Tavel	81	13 524	-6,7%	6,44 €	+1,4%
Vacqueyras	73	11 212	-5,1%	8,63 €	+1,8%
Vinsobres	27	2 367	-9,5%	6,34 €	+0,8%
Costières de Nîmes	74	48 083	+0,6%	3,06 €	+1,3%
Grignan-les-Adhémar	44	7 657	-9,2%	3,20 €	+2,3%
Luberon	63	37 053	-14,9%	3,48 €	+4,7%
Ventoux	92	91 544	+ 2,0%	3,05 €	+2,5%
Duché d'Uzès	1	228	+10,7%	6,16 €	+0,3%
Vivarais	5	2 134	-9,6%	2,76 €	-1,3%
Clairette de Die	95	54 060	-2,1%	4,41 €	+0,2%

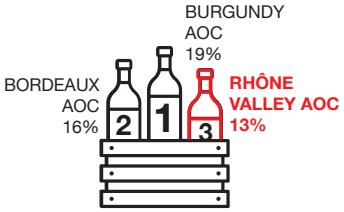
* excluding Discounters and click&collect
* ND : Numerical Distribution

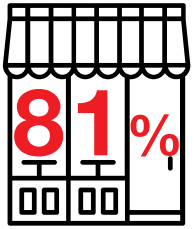
SALES OF RHÔNE VALLEY AOC WINES IN TRADITIONNAL CHANNELS: HOTELS, RESTAURANTS, CAFÉ - HORECA

Sources : On Trade research 2019, in more than 1200 establishments in France. CNIV / Inter Rhône

Definition
AN OFFER STATEMENT EXPRESSES THE NUMBER OF SKUS (BOTTLES) PER ESTABLISHMENT, AND NOT THE VOLUME OF WINE SOLD.

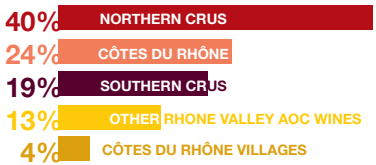
1/ PART OF THE RHONE VALLEY AOC IN FRENCH HOTELS, RESTAURANTS ANS CAFÉ OFFER : ON THE 3RD STEP OF THE PODIUM



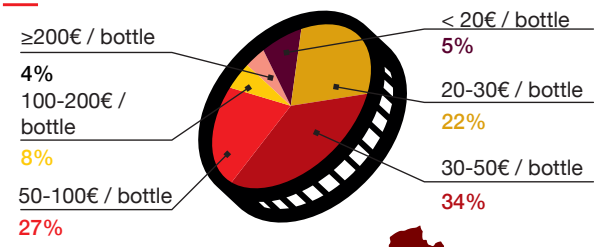


OF THE ESTABLISHMENTS INVESTIGATED OFFER
AT LEAST ONE SKU IN THE RHÔNE VALLEY AOC

2/ PART OF RHÔNE VALLEY AOC IN HORECA OFFER

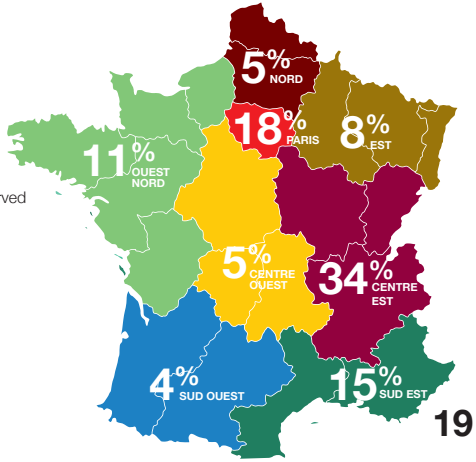


3/ RHÔNE VALLEY AOC DISTRIBUTION BY PRICE RANGE



4/ DISTRIBUTION OF RHÔNE VALLEY VINEYARDS PER REGION

number of SKUs observed

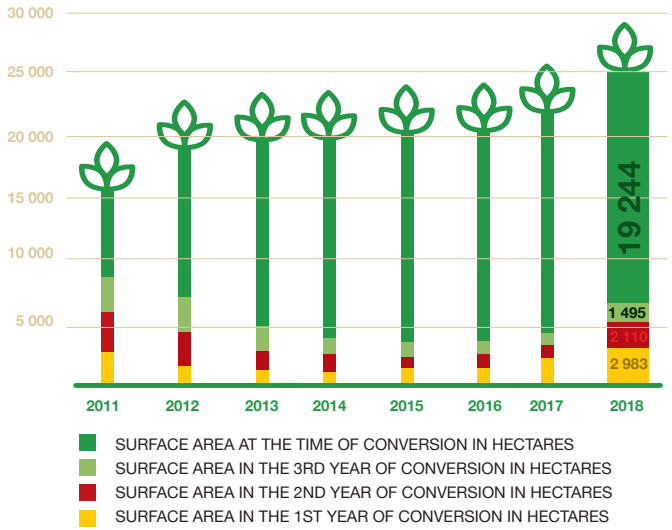


RHÔNE VALLEY VINEYARDS ORGANIC WINES

FROM 2021, FRANCE IS EXPECTED TO BE **THE WORLD'S LEADING CONSUMER OF ORGANIC WINE.** BY 2023, FRANCE IS EXPECTED TO HAVE THE **2ND LARGEST ORGANIC VINEYARD IN THE WORLD.**

1. ORGANIC SURFACE EVOLUTION IN THE PERIMETER SUD EST VIN BIO

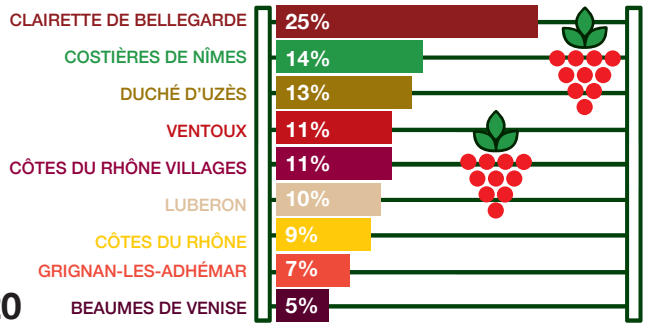
Sources : Agence bio ; Sud Est Vin Bio



THE MARKET SHARE FOR **ORGANIC** WINE PRODUCTION IS **INCREASING** FOR ALL AOC WINES

2. ORGANIC PART IN THE TOTAL HARVEST BY AOC IN 2019

Sources : producers unions, Inter-Rhône

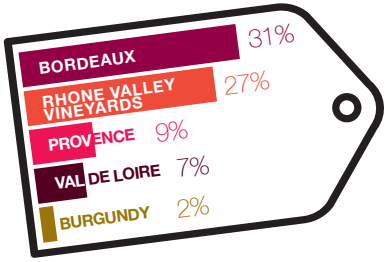


RHÔNE VALLEY VINEYARDS ORGANIC WINES

Source: Panels IRI, Inter Rhône

3. IN SUPERMARKETS

2019 MARKET SHARE



66 002 HL
8%
OF RHÔNE VALLEY AOC SALES IN GMS

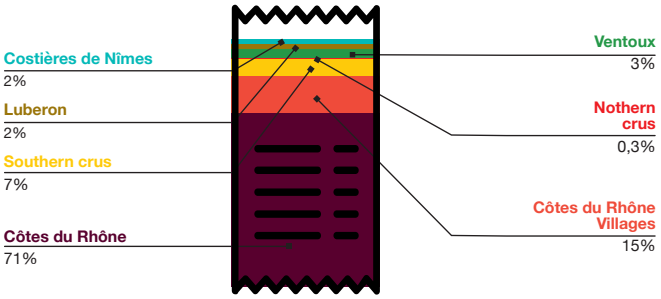
In one year, **the marketing in GMS of the Rhone Valley AOC** increased of

+10,8%
in volumes, higher than the average of the French AOCs (up 7.8%).
Sales of the red Côtes du Rhône (regional AOC), increased by

+10,4%
In value terms, the Rhone Valley AOC increased by

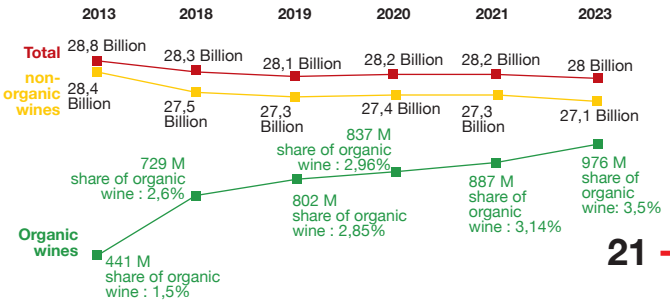
+17,3%
(up 13.1% for the average of the French AOCs).

4. BREAKDOWN BY AOC



5. DEVELOPMENT PROSPECTS

Sources : IWSR, SudVinBio
number of bottles



EXPORTS OF RHÔNE VALLEY AOC WINES

Sources : French Customs Authorities, Inter Rhône estimates
Still wines and sparkling wines



BREAKDOWN OF RHÔNE VALLEY AOC WINES EXPORTS BY VOLUME IN 2019

in hl	Côtes du Rhône 2019 (rég, vill, crus)		Other Rhône Valley AOC wines		Total Rhône Valley Vineyards 2019	
	Red/ Rosés	Whites	Red/ Rosés	Whites		Breakdown as %
USA	118 116	9 221	17 467	1 732	146 536	17%
United Kingdom	121 863	3 098	17 356	432	142 749	16%
Belgium	97 954	4 469	26 777	8 736	137 936	16%
China	37 340	559	31 382	435	69 715	8%
Europe Others	59 836	3 270	8 269	894	72 270	8%
Canada	38 237	3 596	19 364	3 521	64 719	7%
Germany	35 496	1 021	18 047	1 055	55 619	6%
Sweden	45 641	1 479	1 310	542	48 971	6%
Switzerland	28 142	872	2 290	3 363	34 667	4%
Other countries	23 319	1 315	3 821	333	28 789	3%
The Netherlands	15 493	1 412	4 044	632	21 581	2%
Denmark	20 698	598	3 863	352	25 512	3%
Japan	10 748	1 871	3 026	1 386	17 032	2%
Asia	11 154	1 024	1 856	290	14 324	2%
TOTAL	664 036	33 806	158 873	23 704	880 420	

TOTAL RHÔNE VALLEY VINEYARDS AOC WINES (ALL COLOURS)

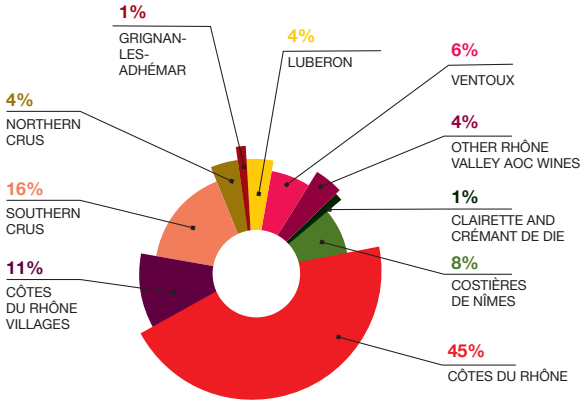
	VOLUME in hl			VALUE in millions of euros		
	2018	2019	Évol	2018	2019	Évol
USA	146 910	146 536	=	107,4	108,8	+1%
United Kingdom	141 900	142 749	+1%	72,2	72,6	+1%
Belgium	144 217	137 936	-4%	51,3	54,3	+6%
China	76 863	69 715	-9%	33,5	28,9	-14%
Europe Others	71 344	72 270	+1%	37,0	39,0	+5%
Canada	64 913	64 719	=	40,1	41,4	+3%
Germany	55 346	55 619	=	29,4	29,6	+1%
Sweden	47 699	48 971	+3%	24,1	26,0	+8%
Switzerland	40 180	34 667	-14%	26,4	26,3	=
Other countries	34 389	28 789	-16%	24,2	21,0	-13%
The Netherlands	29 367	21 581	-27%	13,8	11,4	-17%
Denmark	28 265	25 512	-10%	16,3	15,1	-8%
Japan	15 456	17 032	+10%	11,3	12,4	+9%
Asia	14 643	14 324	-2%	25,4	19,6	-23%
TOTAL	911 493	880 420	-3%	512,5	506,5	-1%

EXPORTS OF RHÔNE VALLEY AOC WINES

Sources: French Customs Authorities,
Inter Rhône estimates
Still wines and sparkling wines

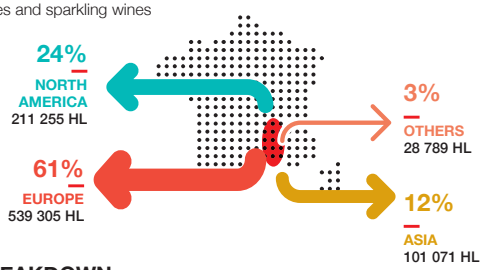


1.BREAKDOWN OF EXPORTS BY AOC IN 2019



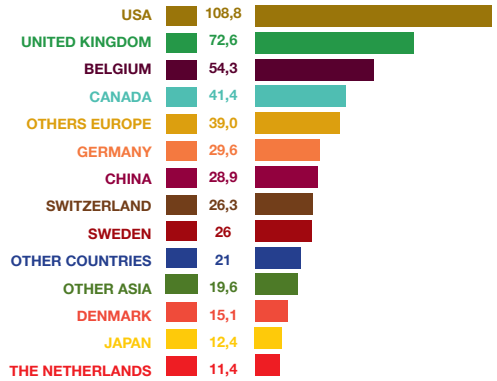
2. BREAKDOWN OF EXPORTS BY GEOGRAPHICAL REGION IN 2019

(in hl, source: French Customs Authorities, Inter Rhône estimates)
Still wines and sparkling wines



3. BREAKDOWN BY VALUE IN 2019

in millions of euros, sources :
French Customs authorities, Inter-Rhône estimates.
Still wines and sparkling wines



2019 KEY FIGURES



67 628 HECTARES AND 2,8 MILLIONS HECTOLITERS PRODUCED IN THE 2019 VINTAGE



355 MILLIONS BOTTLES SOLD IN 2019



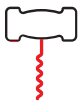
1 818 PRODUCTION UNITS, OF WHICH 1 727 INDEPENDANT WINERIES 91 COOPERATIVE WINERIES



392 TRADING COMPANIES OF WHICH 250 LOCAL OR NATIONAL TRADERS 130 VINIFICATION TRADERS 12 FOREIGN TRADERS



193 EXPORT DESTINATIONS AROUND THE WORLD CONSUMED RHONE VALLEY VINEYARDS AOC WINES IN 2019



11 BOTTLES OF RHONE VALLEY VINEYARDS AOC WINES ARE CONSUMED EVERY SECOND

INTER RHÔNE

FOR FURTHER INFORMATION, PLEASE CONTACT THE ECONOMIC DEPARTMENT:

Sébastien Lacroix • Dominique Toillon • Anthony Cambon • Céline Clavel

cclavel@inter-rhone.com

Tel : 33 (0)4 90 27 24 00

For Rhône Valley Wineries and trading companies, complete economic information is available on the website

www.vins-rhone.com, espace Adhérents

Rouge poivron - photos ©InterRhône DR