

VINS DE PROVENCE

the Taste of Style



KEY FIGURES FOR **2021**

ECONOMIC
ANALYSIS
DEPARTMENT

— • —
CÔTES DE PROVENCE
COTEAUX D'AIX-EN-PROVENCE
COTEAUX VAROIS EN PROVENCE



KEY FIGURES FOR **2021**

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Rosé Wines World Tracking

Vins de Provence ROSÉS

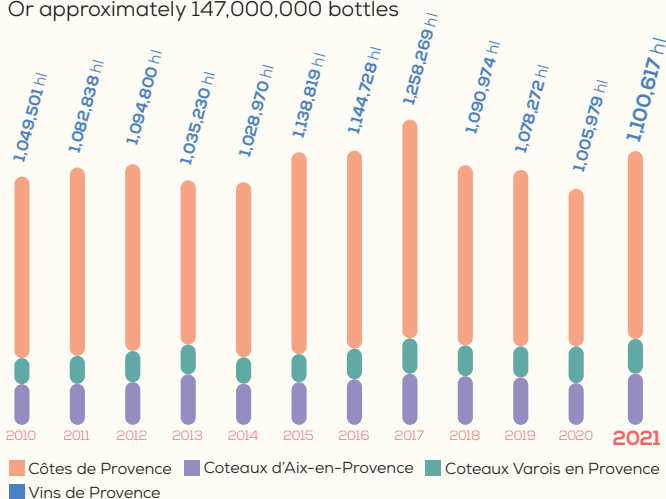
Rosé production

Provence, a historical specialist in **rosé** wine, accounts for 40-45% of French AOC rosés. Worldwide, Provence produces approximately 6% of all **rosés**.

	Vins de Provence	Côtes de Provence	Coteaux d'Aix-en-Provence	Coteaux Varois en Provence
VINTAGE	Rosés (in hl)			
2010	1,122,500	= 843,000	+ 168,500	+ 111,000
2011	1,144,650	= 865,050	+ 170,600	+ 109,000
2012	1,027,500	= 752,700	+ 169,800	+ 105,000
2013	1,059,500	= 801,000	+ 151,000	+ 107,500
2014	1,236,100	= 930,000	+ 184,100	+ 122,000
2015	1,158,283	= 864,783	+ 176,500	+ 117,000
2016	1,168,159	= 878,034	+ 175,099	+ 115,026
2017	1,040,800	= 780,900	+ 159,000	+ 100,900
2018	1,122,596	= 809,973	+ 184,793	+ 127,830
2019	1,155,283	= 833,602	+ 186,012	+ 135,669
2020	1,136,486	= 801,600	+ 208,126	+ 126,759
2021	1,142,024	= 828,710	+ 180,080	+ 133,235

Annual rosé releases to market

Or approximately 147,000,000 bottles



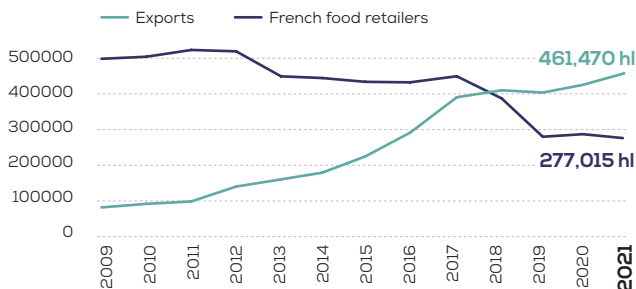
Sources: CIVP, ODG

Sales breakdown and evolution for Vins de Provence rosés

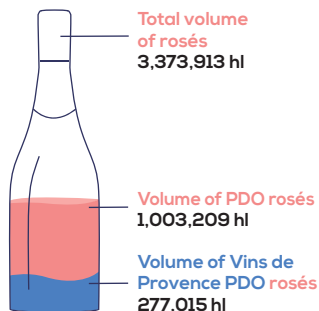
147 million bottle equivalents sold in 2021

Evolution of sales of Vins de Provence rosés, by distribution channel

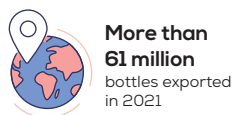
(in hl; food retailers = hypermarkets + supermarkets + grocer's shops + e-commerce)



French food retailers



Evolution of rosé exports



Total exports

Year	Volume (hl)	Value (€)
2016	280,711	157,929,452
2021	461,470	315,207,359

Up **64%** in volume and **100%** in value in the space of 5 years

Top 3 markets in 2021



USA

↓ 163,889 hl
€ 111,239,976

Equivalent to 21,851,906 bottles



UK

↓ 100,794 hl
€ 64,757,323

Equivalent to 13,439,200 bottles



Netherlands

↓ 33,401 hl
€ 18,710,426

Equivalent to 4,453,412 bottles

Sources: CIVP, ODG, IRI panels, French Customs


2021 VINTAGE HARVEST

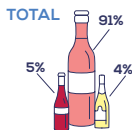
and history

2021 Vins de Provence reported figures (CIVP as per ODG, in hl)




Rosé



 Côtes de Provence: 828,710 hl
 Coteaux d'Aix-en-Provence: 180,080 hl
 Coteaux Varois en Provence: 133,235 hl
Vins de Provence: 1,142,024 hl



White


 Côtes de Provence: 36,259 hl
 Coteaux d'Aix-en-Provence: 13,819 hl
 Coteaux Varois en Provence: 3,841 hl
Vins de Provence: 53,919 hl

Red


 Côtes de Provence: 39,135 hl
 Coteaux d'Aix-en-Provence: 15,204 hl
 Coteaux Varois en Provence: 4,777 hl
Vins de Provence: 59,117 hl



Côtes de Provence

20,332 ha

Coteaux d'Aix-en-Provence

4,308 ha

Coteaux Varois en Provence

3,087 ha



2021 harvests of Côtes de Provence DGCs by volume and area, all colours combined

Côtes de Provence

La Londe



 **VOLUME**
7,603 hl
 **AREA**
163 hectares

Côtes de Provence

Notre-Dame des Anges



 **VOLUME**
4,352 hl
 **AREA**
107 hectares

Côtes de Provence

Sainte-Victoire



 **VOLUME**
23,652 hl
 **AREA**
549 hectares

Côtes de Provence

Pierrefeu



 **VOLUME**
5,541 hl
 **AREA**
124 hectares

Côtes de Provence

Fréjus



 **VOLUME**
689 hl
 **AREA**
16 hectares

Sources: Harvest declarations / reported figures as per ODG

2021 VINTAGE HARVEST

and history

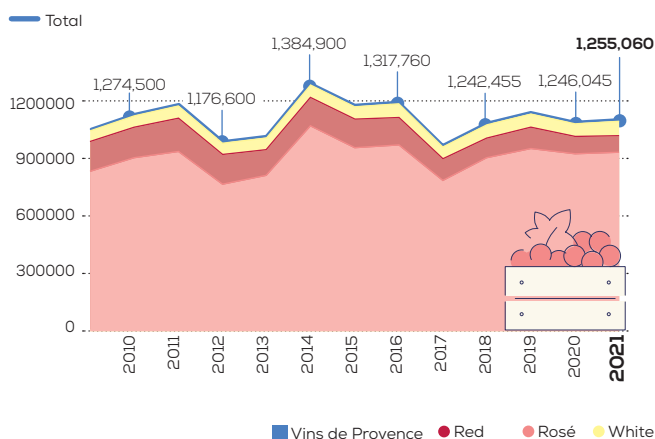
History of Provence wine harvests

by PDO, all colours combined (in hl)

	Côtes de Provence	Coteaux d'Aix-en-Provence	Coteaux Varois en Provence	Total
2010	945000	205500	124000	1274500
2011	975830	211200	122800	1309830
2012	855050	203800	117750	1176600
2013	897000	179000	119330	1195330
2014	1029500	221000	134400	1384900
2015	960864	215000	131000	1306864
2016	977639	212125	127997	1317760
2017	865000	187500	110600	1163100
2018	886908	217757	137791	1242455
2019	918024	216466	146397	1280887
2020	868,538	241,538	135,968	1,246,045
2021	904,104	209,103	141,843	1,255,060

Evolution of Vins de Provence harvests

all colours combined (in hl)



Sources: Harvest declarations / reported figures as per ODG

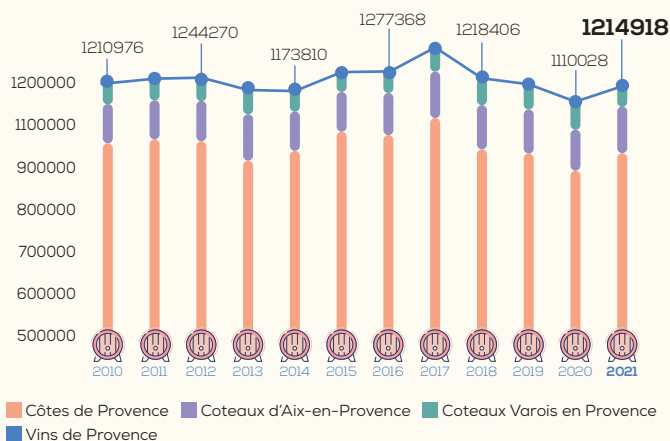
2021 RELEASES TO MARKET

and evolution

History of Vins de Provence wine releases to market
by PDO, all colours combined (in hl)

	Côtes de Provence	Coteaux d'Aix-en-Provence	Coteaux Varois en Provence	Total
2010	914176	186390	110410	1210976
2011	933247	185670	114926	1233843
2012	923800	191940	128530	1244270
2013	832110	219670	122830	1174610
2014	878488	186847	108475	1173810
2015	969577	188621	113957	1272155
2016	953906	199828	123634	1277368
2017	1034280	220634	141343	1396257
2018	885783	209527	123097	1218406
2019	865963	209116	123496	1198575
2020	784,498	194,434	131,096	1,110,028
2021	867,327	221,594	125,997	1,214,918

History of Vins de Provence releases to market, by AOP, all colours combined



Sources: Monthly summary declarations, CIVP

Vins de Provence

WINE REGION

Proportion of local agriculture



Total UF* in the Var and Bouches-du-Rhône



Total vineyard area in the two departments

Bouches-du-Rhône:
142,000 hectares

Var:
73,284 hectares

* Usable farmland

Bouches-du-Rhône:
10,595 ha of vines, incl.
6,667 ha of PDO vines

Var: 30,000 ha of vines, incl. 20,793 ha of PDO vines



Structure of the wine region

Cooperative wineries
55 operators

37 producing CP wine
12 producing CAP wine
11 producing CVP wine

Vineyards
473 operators

344 producing CP wine
75 producing CAP wine
65 producing CVP wine

Wine-making merchants
36 operators

31 producing CP wine
2 producing CAP wine
5 producing CVP wine



Structure of the markets







































	Côtes de Provence	Coteaux d'Aix-en-Provence	Coteaux Varois en Provence	Total
Volume of bulk releases	460,353 hl	129,477 hl	92,451 hl	682,282 hl
Volume of bottled releases	310,959 hl	90,992 hl	30,859 hl	432,810 hl
Grapes (as per merchant / winery SVI2s)	96,014 hl	1,125 hl	2,687 hl	99,826 hl
Total	867,327 hl	221,594 hl	125,997 hl	1,214,918 hl

Sources: Monthly summary declarations, Bouches-du-Rhône and Var Chambers of Agriculture

EVOLUTION

of sales channels

ROSES		
Food retailers 2010-2021	Exports 2010-2021	Other (dining, wine merchants & wineries) 2010-2021
 49% 2010	 7% 2010	 44% 2010
 49% 2011	 8% 2011	 43% 2011
 48% 2012	 11% 2012	 40% 2012
 44% 2013	 14% 2013	 42% 2013
 43% 2014	 16% 2014	 41% 2014
 39% 2015	 19% 2015	 42% 2015
 38% 2016	 25% 2016	 37% 2016
 36% 2017	 30% 2017	 33% 2017
 36% 2018	 38% 2018	 27% 2018
 26% 2019	 37% 2019	 37% 2019
 28% 2020	 43% 2020	 29% 2020
 25% 2021	 42% 2021	 33% 2021

Sources: Customs statistics, IRI, CIVP

FOOD RETAILERS:

2021 sales and evolution over 10 years

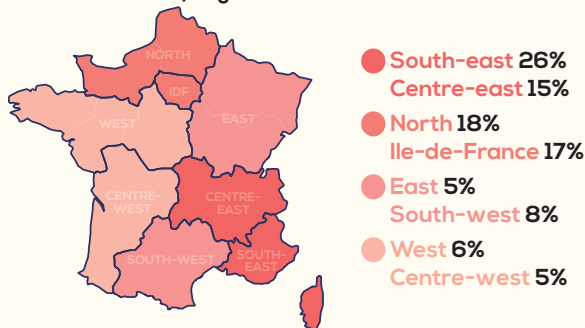
FRENCH FOOD RETAILERS (EXCLUDING LIDL AND ALDI)	VOLUME (in hl)	VALUE (in €)
Vins de Provence wines	292,494	247,762,280
Vins de Provence rosés	277,015	232,769,658
Côtes de Provence reds	4,729	4,712,790
Coteaux d'Aix-en-Provence reds	2,809	2,343,094
Coteaux Varois en Provence reds	493	392,792
Côtes de Provence whites	3,369	4,003,538
Coteaux d'Aix-en-Provence whites	3,531	3,062,471
Coteaux Varois en Provence whites	547	477,939
Côtes de Provence rosés	192,787	174,160,877
Coteaux d'Aix-en-Provence rosés	42,372	28,641,233
Coteaux Varois en Provence rosés	41,857	29,967,548

Evolution of sales

Vins de Provence rosés sold by food retailers



Breakdown of sales of Vins de Provence rosés by French food retailers in 2021, by region



ENVIRONMENTAL LABELS

37% of producers of Vins de Provence wines have an environmental label, accounting for 20% of the wine region's area and 18% of the total volume of wine.

2021 vintage

Vins de Provence (3 PDOs)



COOPERATIVE WINERIES

A total of **55** cooperative wineries spanning **12,979 hectares**



ORGANIC

22 cooperative wineries spanning **1,020 hectares**



HIGH ENVIRONMENTAL VALUE (HEV)

22 cooperative wineries spanning **2,751 hectares**



INDIVIDUAL WINERIES

A total of **473** individual wineries spanning **12,230 hectares**



ORGANIC

181 individual wineries spanning **4,300 hectares**



HIGH ENVIRONMENTAL VALUE (HEV)

114 individual wineries spanning **3,875 hectares**



WINE-MAKING MERCHANTS

A total of **36** wine-making merchants spanning **2,518 hectares**



ORGANIC

10 wine-making merchants spanning **120 hectares**



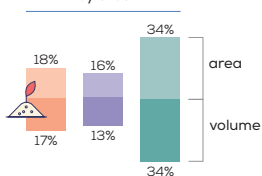
HIGH ENVIRONMENTAL VALUE (HEV)

10 wine-making merchants spanning **82 hectares**

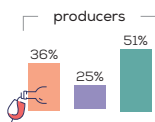


Organic

20% of the wine region by area



18% of total volume




Made by **37%** of producers

● Côtes de Provence ● Coteaux d'Aix-en-Provence ● Coteaux Varois en Provence

ENVIRONMENTAL LABELS

154,496 hl
of
CÔTES DE PROVENCE


 **18,739 hl**
cooperative wineries

 **3,917 hl**
wine-making merchants

 **131,841 hl**
individual wineries

27,509 hl
of
COTEAUX D'AIX-EN PROVENCE

 **6,570 hl**
cooperative wineries

 **20,939 hl**
individual wineries

48,857 hl
of
COTEAUX VAROIS EN PROVENCE

 **25,809 hl**
cooperative wineries

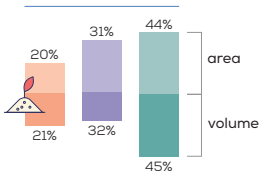
 **504 hl**
wine-making merchants

 **22,544 hl**
individual wineries

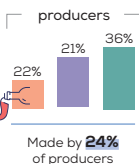


High Environmental Value (HEV)

24% of the wine region
by area



25% of total volume



186,551 hl
of
CÔTES DE PROVENCE

 **66,620 hl**
cooperative wineries

 **4,170 hl**
wine-making merchants

 **115,760 hl**
individual wineries

66,583 hl
of
COTEAUX D'AIX-EN PROVENCE

 **36,337 hl**
cooperative wineries

 **30,246 hl**
individual wineries

64,142 hl
of
COTEAUX VAROIS EN PROVENCE

 **29,915 hl**
cooperative wineries

 **34,228 hl**
individual wineries

● Côtes de Provence ● Coteaux d'Aix-en-Provence ● Coteaux Varois en Provence

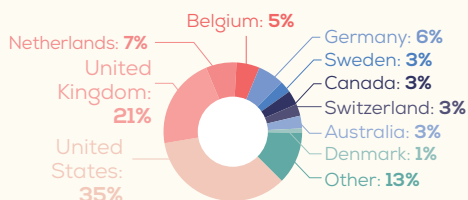
Vins de Provence

EXPORTS

The top commercial outlet!

Total volume for all countries

Vins de Provence exports, 3 PDOs (reds + rosés)



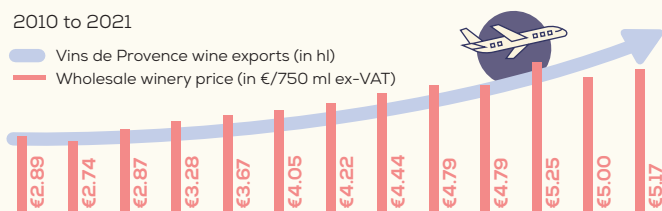
Proportion of rosés:
96%

Top 10 countries in 2021

		Volume (in hl)	Average price of a VdP wine * Wholesale winery FOB price ex-VAT	Change in volume	Change in price
1	USA	166614	5.10	-8%	+1%
2	UK	102182	4.90	+16%	0%
3	Netherlands	34193	4.20	+11%	0%
4	Germany	29466	4.80	+18%	+3%
5	Belgium	25882	4.00	+3%	+1%
6	Sweden	13122	4.20	-2%	+5%
7	Canada	15879	5.50	+21%	+3%
8	Switzerland	13325	6.00	+3%	+8%
9	Australia	14170	4.90	+16%	0%
10	Denmark	5015	4.50	0%	+11%
	Total:	478,232 hl	Total: €5.20		

2010 to 2021

Vins de Provence wine exports (in hl)
 Wholesale winery price (in €/750 ml ex-VAT)



Sources: French Customs



ROSÉ WINES WORLD TRACKING

In 2021, Rosé Wines World Tracking conducted a study of trends in shades, recorded prices and the origins of rosé wines from around the world.

Reminder:



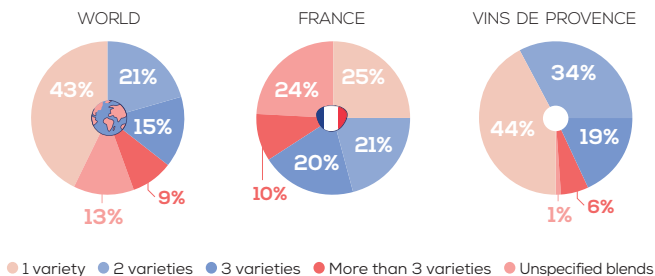
23.6 million hectolitres
consumed in 2019



23 million hectolitres
produced in 2019

Global production of rosé in 2021

Grape varieties:



43% of rosés are single varietal wines

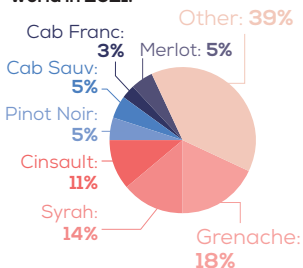


That is an increase from 2018 (38%).
Indication of the grape(s) used is often a source of added value.

The largest percentage of French rosés are single varietal wines (25%).

As concerns wines from Provence, although the grape varieties are not often indicated on the front label, the information is usually available on the distributor's or the producer's information sheets.

Main varieties recorded around the world in 2021:



Sources: FAM, CIVP, AGREX.
2021 data based on reports of global supply in the top countries.



ROSÉ WINES WORLD TRACKING

Global supply: Organic

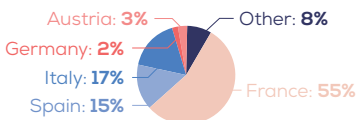
Global supply of rosé in 2021

Organic rosés

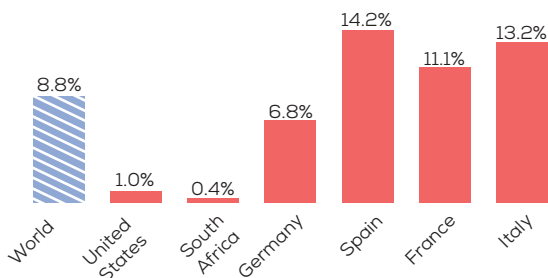


In 2021, **8.8%** of the world's supply of rosé was organic, compared to 4.8% in 2018.

Main producers of organic rosés

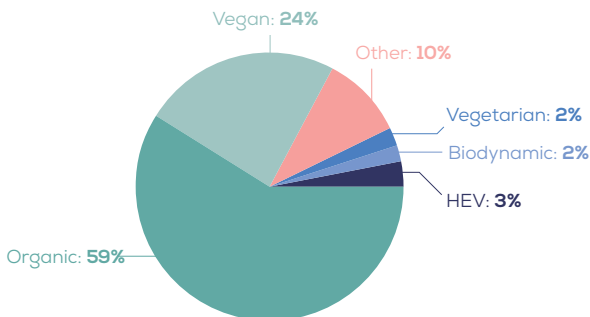


Proportion of organic wine out of total rosé supply



Most of the global supply of organic rosé (more than 90%) still comes from Europe.

Regulated labels



Sources: FAM, CIVP, AGREX.

2021 data based on reports of global supply in the top countries.

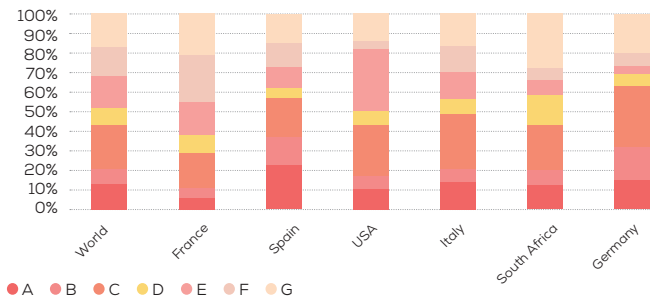


ROSÉ WINES WORLD TRACKING

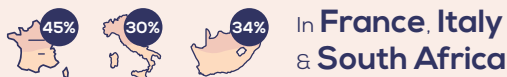
Global supply: Shades

Recorded colours

Shades of rosé wines from the main production countries



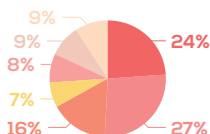
Fairly dark rosés (categories A and B) are more common than in other countries (15%).



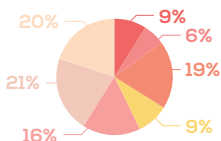
The lightest shades (categories F and G) are holding strong on rosé wine markets.

France has the widest array of shades, although the lightest colours (F and G) account for more than half of its supply.

Shades of rosés around the world in 2013



Shades of rosés around the world in 2021



Light (C to E) and even very light (F and G) rosés regularly take the lead over the darker hues (A and B), which accounted for less than 15% of global supply in 2021.

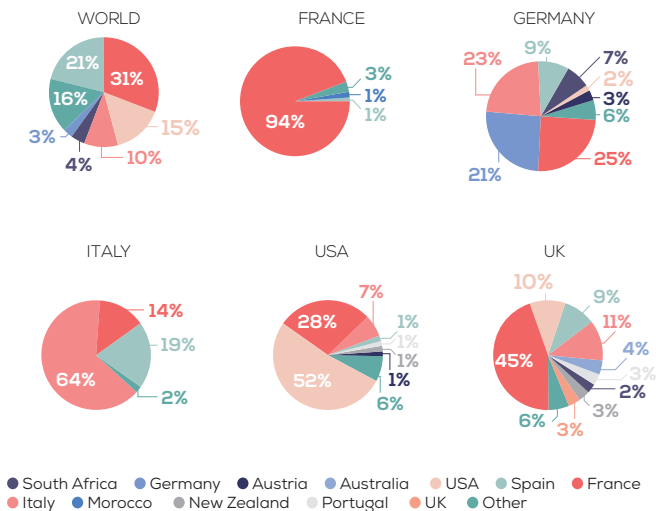
Sources: FAM, CIVP, AGREX.
2021 data based on reports of global supply in the top countries.



ROSÉ WINES WORLD TRACKING

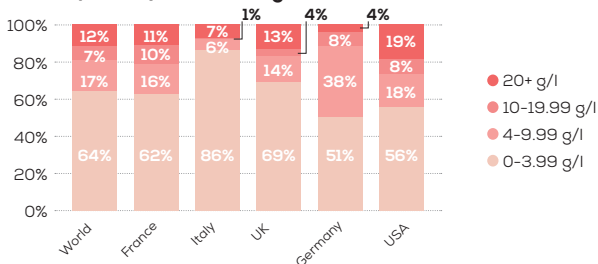
Global supply: Origins

Supply of rosé available for consumption in 2021



The French and Italian markets remain fairly closed to a diversified supply, although France's foreign supply rose from 2% in 2018 to more than 5% in 2021. Amongst the other consumer countries, French rosés tend to be fairly dominant. Everywhere except Italy and the USA, France is the most frequently consumed country of origin.

Consumption by residual sugar content



Consumption of dry rosés is on the rise. Wine with more than 10 g/l of residual sugar accounts for less than 20% of the total volume consumed around the world.

Sources: FAM, CIVP, AGREX.

2021 data based on reports of global supply in the top countries.

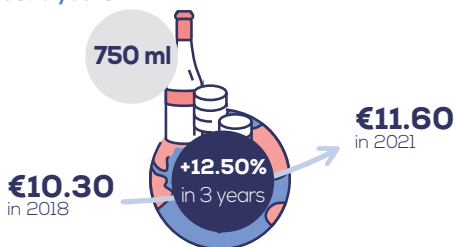


ROSÉ WINES WORLD TRACKING

Global supply: Prices

Prices of **rosé** wine consumed around the world
(all shades, per bottle)

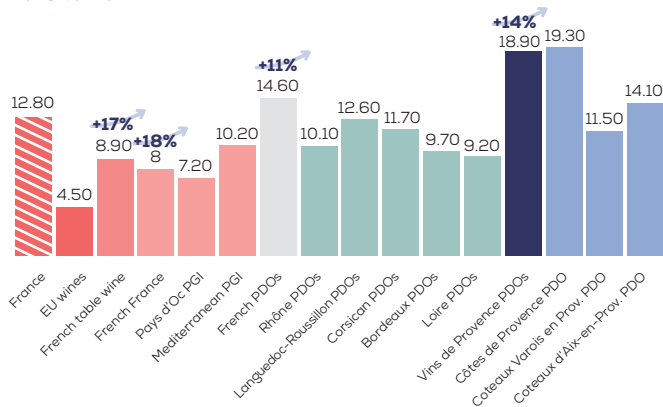
Over the last 3 years



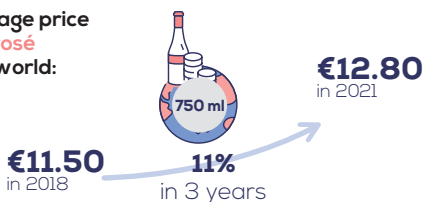
The pricing for Italian rosés is similar to French rosés but 30% higher than in Spain. French rosés have a higher in-store average price than the worldwide average (all origins combined), having increased by 11.3% in 3 years.

Pricing levels for the different French geographic indications for **rosés** (€/750 ml glass btl)

2018 to 2021



Average price of a **rosé** around the world:



Sources: FAM, CIVP, AGREX.
2021 data based on reports of global supply in the top countries.

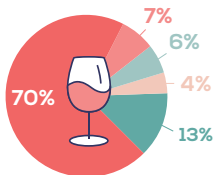


ROSÉ WINES WORLD TRACKING

National premium niches

We looked at the top 5% most highly valued **rosés** by **STUDIED COUNTRY**

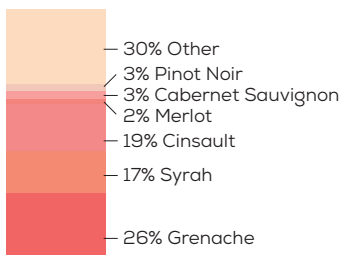
Geographic origins of premium rosés



The top 5% of the world's most highly valued rosés come primarily from France, at 70%, of which 85% is from Provence.

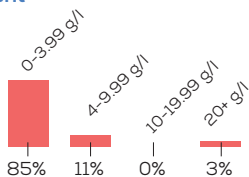
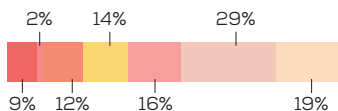
USA Spain France
Italy Other

Assortment by variety



The most highly valued 5% of rosés are primarily made with Grenache, Cinsault and Syrah.

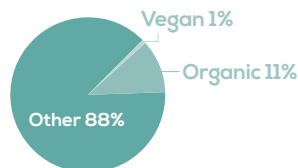
Assortment by shade and sugar content



The most highly valued 5% of rosés are light, or even very light, like Vins de Provence rosés.

Light-coloured wines with low sugar content are the most highly valued.

Presence of labels



The most highly valued 5% of rosés have no more regulated labels than rosé wines in general. In fact, just 12% of the most highly valued wines display an organic label. That is less than half the average amongst global supply.

Sources: FAM, CIVP, AGREX.

2021 data based on reports of global supply in the top countries.

VINS DE PROVENCE

the Taste of Style

KEY FIGURES FOR **2021**

ECONOMIC ANALYSIS DEPARTMENT

CÔTES DE PROVENCE
COTEAUX D'AIX-EN-PROVENCE
COTEAUX VAROIS EN PROVENCE



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