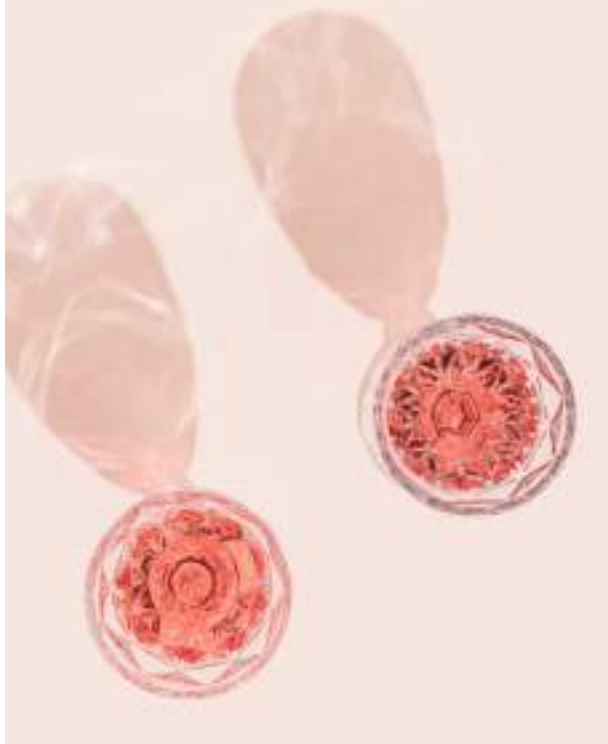


VINS DE PROVENCE

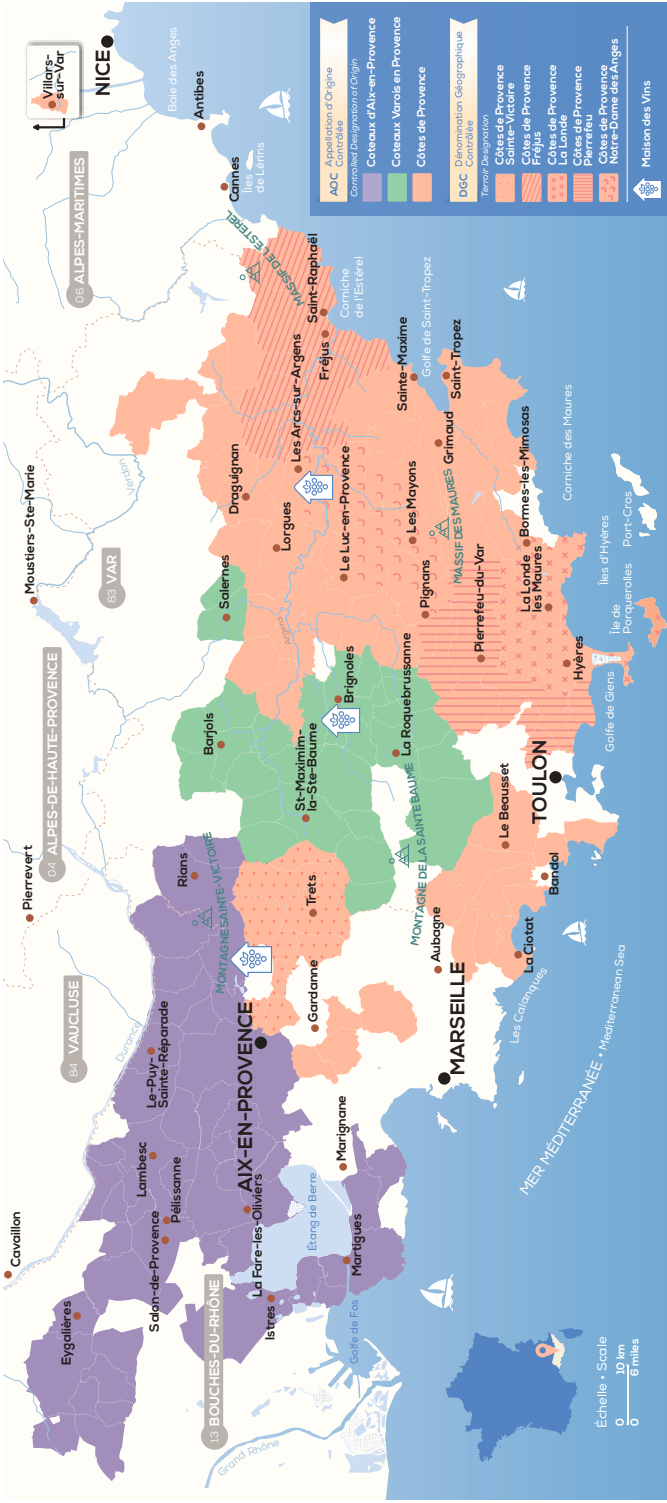


KEY FIGURES FOR 2022

ECONOMIC ANALYSIS
DEPARTMENT



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



KEY FIGURES FOR 2022

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Latest figures from the Economic Analysis Department

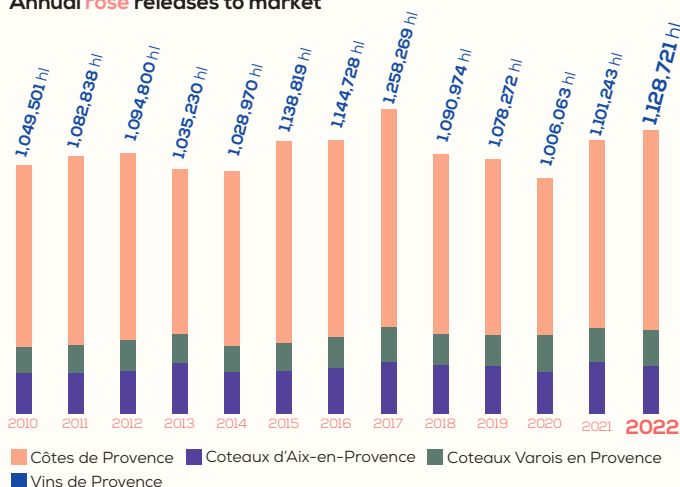
Vins de Provence ROSÉS

ROSÉ PRODUCTION

Provence, a historical specialist in **rosé** wine, accounts for **40-45% of French PDO rosés**. On a worldwide scale, Provence produces around **5%** of all **rosés**.

	CÔTES DE PROVENCE	COTEAUX D'AIX-EN-PROVENCE	COTEAUX VAROIS EN PROVENCE	TOTAL
VINTAGE	Rosés (in hl)			
2010	843,000	168,500	111,000	1,122,500
2011	865,050	170,600	109,000	1,144,650
2012	752,700	169,800	105,000	1,027,500
2013	801,000	151,000	107,500	1,059,500
2014	930,000	184,100	122,000	1,236,100
2015	864,783	176,500	117,000	1,158,283
2016	878,034	175,099	115,026	1,168,159
2017	780,900	159,000	100,900	1,040,800
2018	809,973	184,793	127,830	1,122,596
2019	833,602	186,012	135,669	1,155,283
2020	801,600	208,126	126,759	1,136,486
2021	828,710	180,080	133,235	1,142,024
2022	836,376	205,309	135,670	1,177,355

Annual rosé releases to market



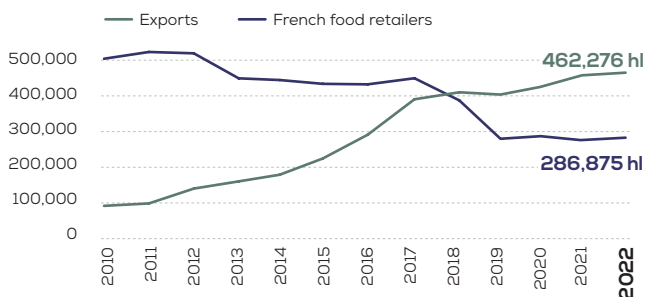
Sources: CIVP, ODGs

Sales breakdown and evolution for Vins de Provence rosés

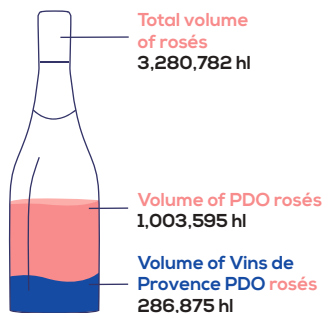
150 million bottle equivalents sold in 2022

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



More than 61 million
bottles exported
in 2022

Total exports

2018	2022
410,760 hl	462,276 hl
€262,392,945	€368,805,196

Up **13%** in volume
and **41%** in value
in the space of 5 years

Top 3 markets in 2022



USA
176,228 hl
€149,278,304

Equivalent to
23,500,000 bottles



UK
89,644 hl
€66,846,704

Equivalent to
12,000,000 bottles



Netherlands
33,042 hl
€19,161,832

Equivalent to
4,400,000 bottles


Sources: CIVP, ODGs, IRI panels, French Customs

2022 VINTAGE HARVEST and history

2022 Vins de Provence reported figures (CIVP as per ODGs, in hl)




Rosé



 | Côtes de Provence: 836,376 hl
 | Coteaux d'Aix-en-Provence: 205,309 hl
 | Coteaux Varois en Provence: 135,670 hl
Vins de Provence: 1,177,355 hl



White


 | Côtes de Provence: 44,195 hl
 | Coteaux d'Aix-en-Provence: 17,545 hl
 | Coteaux Varois en Provence: 4,796 hl
Vins de Provence: 66,536 hl

Red


 | Côtes de Provence: 39,218 hl
 | Coteaux d'Aix-en-Provence: 16,871 hl
 | Coteaux Varois en Provence: 6,480 hl
Vins de Provence: 62,569 hl


348
 individual wineries


35
 cooperative wineries


30 wine-making merchants


64
 individual wineries


12
 cooperative wineries


3 wine-making merchants


67
 individual wineries


11
 cooperative wineries


5 wine-making merchants

2022 harvests of Côtes de Provence DGCs by volume and area, all colours combined

Côtes de Provence

La Londe


VOLUME
 7,694 hl
AREA
 175 hectares

Côtes de Provence

Notre-Dame des Anges


VOLUME
 4,036 hl
AREA
 101 hectares


Côtes de Provence

Sainte-Victoire


VOLUME
 26,944 hl
AREA
 591 hectares

Côtes de Provence

Pierrefeu


VOLUME
 3,908 hl
AREA
 92 hectares

Côtes de Provence

Fréjus


VOLUME
 2,772 hl
AREA
 63 hectares

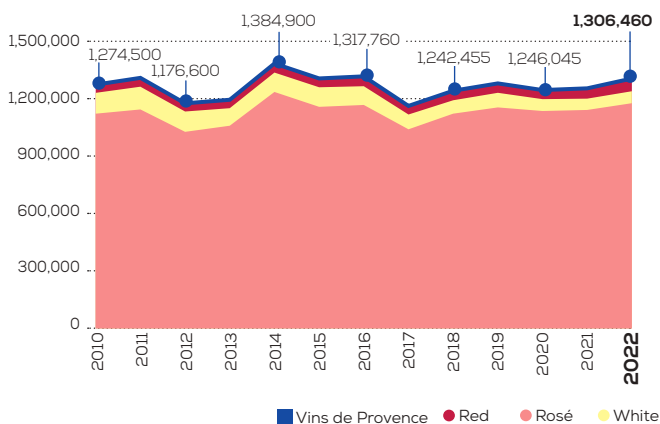
Sources: Harvest declarations / reported figures as per ODGs

2022 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	945,000	205,500	124,000	1,274,500
2011	975,830	211,200	122,800	1,309,830
2012	855,050	203,800	117,750	1,176,600
2013	897,000	179,000	119,330	1,195,330
2014	1,029,500	221,000	134,400	1,384,900
2015	960,864	215,000	131,000	1,306,864
2016	977,639	212,125	127,997	1,317,760
2017	865,000	187,500	110,600	1,163,100
2018	886,908	217,757	137,791	1,242,455
2019	918,024	216,466	146,397	1,280,887
2020	868,538	241,538	135,968	1,246,045
2021	904,104	209,103	141,843	1,255,060
2022	919,789	239,725	146,946	1,306,460

Evolution of Vins de Provence harvests
by colour (in hl)



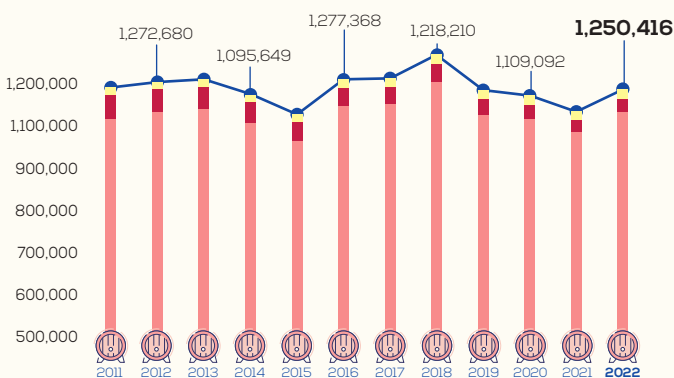
Sources: Harvest declarations / reported figures as per ODGs

2022 RELEASES TO MARKET and evolution

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

	CÔTES DE PROVENCE	COTEAUX D'AIX-EN-PROVENCE	COTEAUX VAROIS EN PROVENCE	TOTAL
2010	941,556	187,058	113,239	1,241,853
2011	969,293	185,817	117,849	1,272,959
2012	960,271	196,138	131,377	1,287,786
2013	867,711	221,262	125,791	1,214,764
2014	841,510	171,422	105,207	1,118,140
2015	968,055	188,621	113,956	1,270,632
2016	953,906	199,828	123,634	1,277,368
2017	1,034,280	220,634	141,343	1,396,257
2018	885,607	209,525	123,079	1,218,210
2019	862,090	204,621	123,398	1,190,109
2020	783,839	194,159	131,094	1,109,092
2021	872,274	221,820	127,407	1,221,501
2022	909,338	214,492	126,593	1,250,423

Evolution of Vins de Provence releases to market by colour (in hl)



■ Côtes de Provence
 ■ Coteaux d'Aix-en-Provence
 ■ Coteaux Varois en Provence
 ■ Vins de Provence

Sources: Monthly summary declarations, CIVP

STRUCTURE of Vins de Provence



Structure of the wine region

COOPERATIVE WINERIES

53 operators



35 producing CP wine

12 producing CAP wine

11 producing CVP wine

INDIVIDUAL WINERIES

469 operators



348 producing CP wine

64 producing CAP wine

67 producing CVP wine

WINE-MAKING MERCHANTS

37 operators



30 producing CP wine

3 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	480,628 hl	129,415 hl	93,958 hl	704,001 hl
Volume of bottled releases	313,762 hl	86,453 hl	30,689 hl	430,905 hl
Grapes (as per merchant / winery SV12s)	115,039 hl	556 hl	2,321 hl	117,916 hl
Total	909,430 hl	216,424 hl	126,968 hl	1,252,823 hl

Sources: Monthly summary declarations

EVOLUTION of sales channels

ROSES		
Food retailers 2012-2022	Exports 2012-2022	Other (dining, wine merchants & wineries) 2012-2022
 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% 2017	 27% 2018
 26% 2019	 37% 2019	 37% 2019
 28% 2020	 43% 2020	 29% 2020
 25% 2021	 42% 2021	 33% 2021
 24% 2022	 39% 2022	 37% 2022

Sources: Customs statistics, IRI, CIVP

FOOD RETAILERS: 2022 sales and evolution over 10 years


FRENCH FOOD RETAILERS	VOLUME (in hl)	VALUE (in € incl. VAT)
Vins de Provence wines	302,069	262,804,979
Vins de Provence rosés	286,875	247,218,563
Côtes de Provence rosés	202,506	186,035,931
Coteaux d'Aix-en-Provence rosés	42,160	29,805,460
Coteaux Varois en Provence rosés	42,210	31,377,172
Côtes de Provence reds	4,269	4,470,332
Coteaux d'Aix-en-Provence reds	2,363	2,124,697
Coteaux Varois en Provence reds	525	410,585
Côtes de Provence whites	3,745	4,575,266
Coteaux d'Aix-en-Provence whites	3,709	3,456,645
Coteaux Varois en Provence whites	582	548,890

Evolution of sales

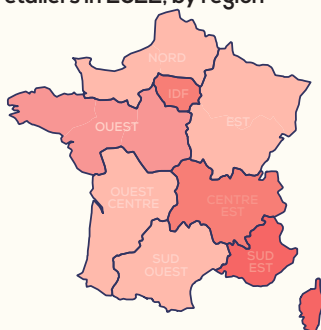
Vins de Provence rosés sold by food retailers


389,493 hl
 in 2018
286,875 hl
 in 2022


€274,383,917 incl. VAT
 in 2018
€247,218,563 incl. VAT
 in 2022


 Average price/750 ml btl:
€5.28 incl. VAT
 in 2018
 Average price/750 ml btl:
€6.46 incl. VAT
 in 2022

Breakdown of sales of Vins de Provence rosés by French food retailers in 2022, by region



- South-east 25%
- Centre-east 16%
- Ile-de-France 16%
- West 11%
- South-west 8%
- North 7%
- Centre-west 6%
- East 6%

ENVIRONMENTAL LABELS

2022 vintage

Vins de Provence (3 PDOs)

COOPERATIVE WINERIES



A total of **53** cooperative wineries spanning **12,847 hectares**, with:

 ORGANIC

24 cooperative wineries on **1,028 ha**

 HIGH ENVIRONMENTAL VALUE (HEV)

34 cooperative wineries on **6,785 ha**

INDIVIDUAL WINERIES



A total of **469** individual wineries spanning **12,145 hectares**, with:

 ORGANIC

220 individual wineries on **5,458 ha**

 HIGH ENVIRONMENTAL VALUE (HEV)

96 individual wineries on **3,597 ha**

WINE-MAKING MERCHANTS



A total of **37** wine-making merchants spanning **2,788 hectares**, with:

 ORGANIC

13 wine-making merchants on **180 ha**

 HIGH ENVIRONMENTAL VALUE (HEV)

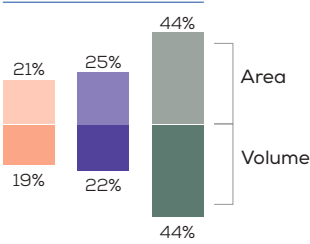
1 wine-making merchant

ENVIRONMENTAL LABELS

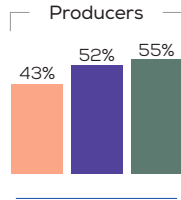


Organic areas and volumes in 2022

24% of the total Vins de Provence vineyard area is organically cultivated



22% of the total Vins de Provence wine volume is organically cultivated

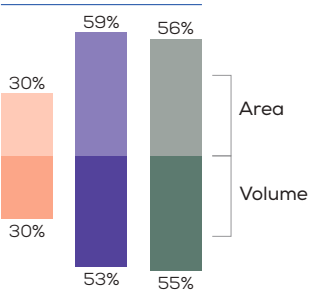


In 2022, **46%** of producers made certified organic Vins de Provence wines

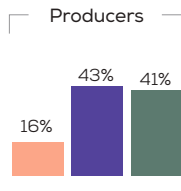


High Environmental Value (HEV)

37% of the wine region by area



37% of total volume



Made by **24%** of producers

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

EXPORTS

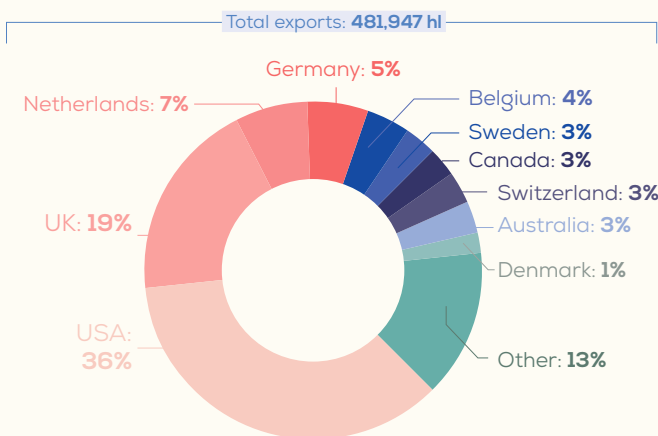
of Vins de Provence wine

Still the top commercial outlet in 2022!

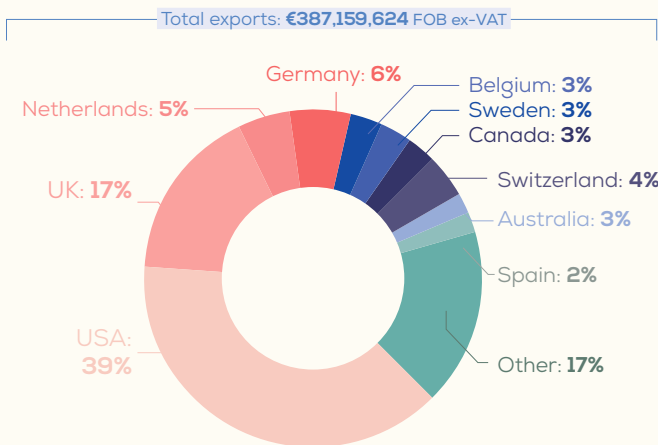
Total volume for all countries

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

VINS DE PROVENCE WINE EXPORTS
RED AND ROSE
by volume in 2022



VINS DE PROVENCE WINE EXPORTS
RED AND ROSE
by value in 2022



Sources: CIVP, French Customs

EXPORTS

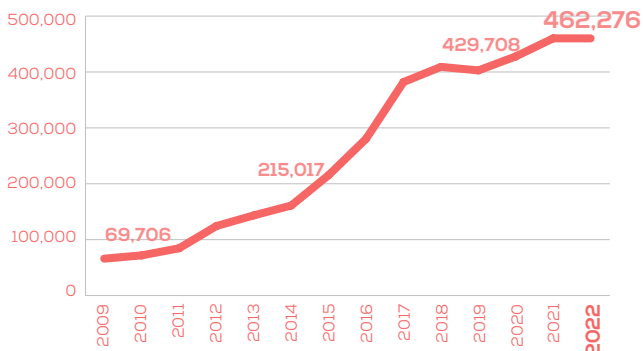
of Vins de Provence wine

Still the top commercial outlet in 2022!

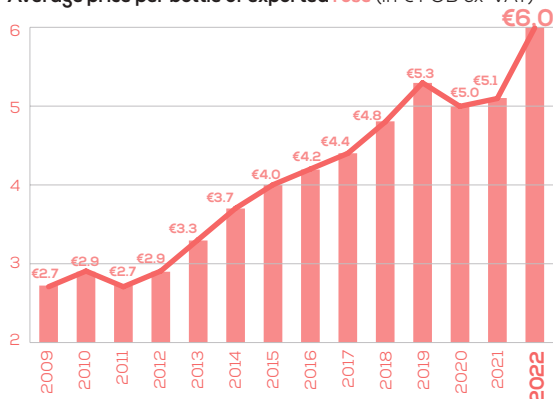


Proportion of rosés exported by volume: **96%**

Vins de Provence rosé exports (in hl)



Average price per bottle of exported rosé (in € FOB ex-VAT)



Top 10 export countries for Vins de Provence rosés in 2022

	Volume (in hl)	Average price of a Vins de Provence wine* (in €/btl FOB ex-VAT)
1 🇺🇸 USA	176,228	6.4
2 🇬🇧 UK	89,644	5.6
3 🇳🇱 Netherlands	33,042	4.3
4 🇩🇪 Germany	29,666	5.6
5 🇧🇪 Belgium	18,740	4.8
6 🇨🇦 Canada	15,117	6.1
7 🇨🇭 Switzerland	15,113	7.2
8 🇦🇺 Australia	14,256	5.2
9 🇸🇪 Sweden	12,972	4.5
10 🇪🇸 Spain	8,364	7.5

Sources: CIVP, French Customs

Supply of rosé to the French dining sector

Still rosés (750 ml): Key indicators

5.1% Proportion of individual still wine products sold in 750 ml bottles that are **rosés**

€26 Median price of a 750 ml bottle of still **rosé**

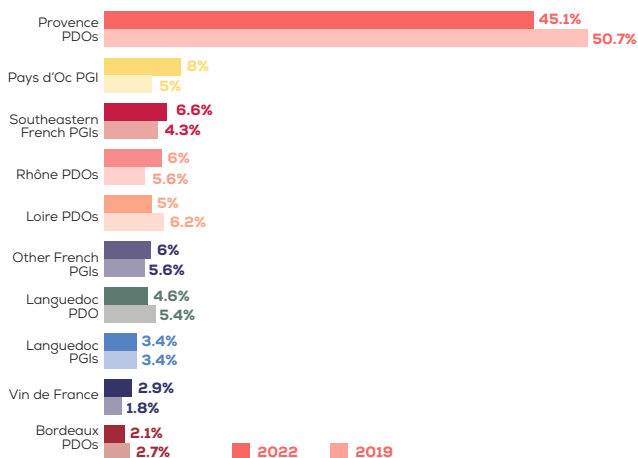
€32 Median price of a 750 ml bottle of Vins de Provence **rosé**

65% of dining venues sell Vins de Provence **rosés** by the 750 ml bottle

Share of Vins de Provence out of total rosé supply

Vins de Provence wines account for the biggest proportion by far of all bottles of rosé available on wine menus in the dining sector (45%), although this is a 5% drop since 2019, most of which went to PGIs.

Top 10 origins as a proportion of supply: Still rosés in 750 ml bottles



Presence at points of sale

Provence is a must amongst wine merchants, with its presence of 82%. Vins de France table wine come in fairly far behind in second place at 58%.

Source: Symetris report on supply to the French dining sector in 2022, produced for CNIV and CIVP

Supply of rosé to French wine merchants

Still rosés (750 ml): Key indicators

5.1% Proportion of individual still wine products sold in 750 ml bottles that are rosés

€11 Median price of a 750 ml bottle of still rosé

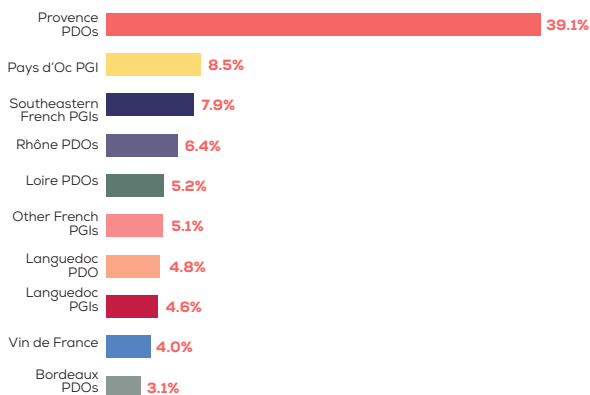
€15 Median price of a 750 ml bottle of Vins de Provence rosé

82% of wine merchants sell Vins de Provence rosés by the 750 ml bottle

Share of Vins de Provence out of total rosé supply

Vins de Provence wine far and away dominates the supply of rosé offered by wine merchants (39%). As for PGI wine, it represents more than ¼ of all individual still rosé products.

Top 10 origins as a proportion of supply: Still rosés in 750 ml bottles



Presence at points of sale

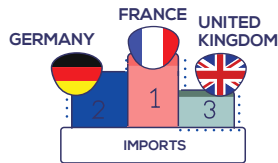
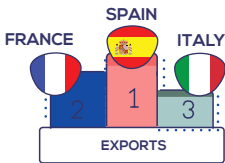
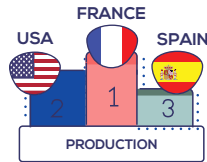
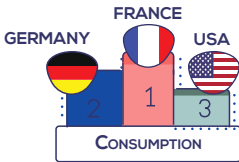
Provence enjoys a pre-eminent presence, with its wines available for purchase at **65% of dining venues**. It is worth noting that this figure is declining (down from 68% in 2019). The Pays d'Oc and southeastern French PGIs follow far behind with presences of 19% and 17% respectively.



ROSÉ WINES WORLD TRACKING

Consumption

Four volume indicators



Consumption

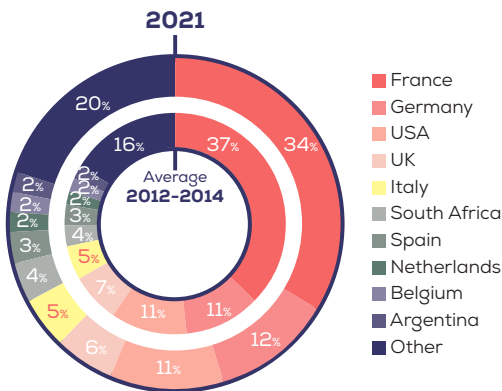


Rosé consumption in 2021:
19-21 million hl

Between 2012 and 2021, *rosé* consumption increased significantly, at a time when figures were dropping sharply across all three colours combined.



In 2021, nearly **1 in 10 bottles** of wine consumed worldwide was a bottle of *rosé*.



France remains the world's biggest consumer of *rosé*, accounting for 34% of the total volume consumed. But it is losing ground.

Sources: Wine Intelligence, IWSR, FAM, CIVP



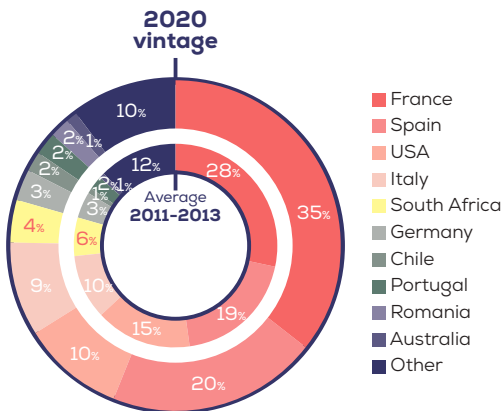
ROSÉ WINES WORLD TRACKING

Production

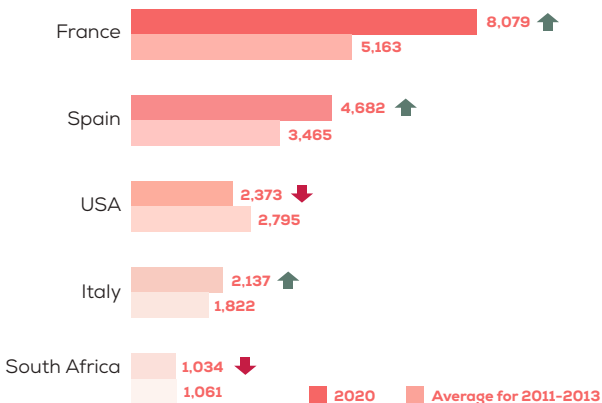
Production

Rosé production volumes increased yet again with the 2020 vintage. Over the previous decade, rosés had achieved net gains of 4.6 million hectolitres (up 25%).

France remains the world's biggest producer of rosé, accounting for 35% of total volume, and continues to gain ground.



Over the space of 10 years, rosé wine production grew in most of the main countries, with the exception of the US, where it declined.



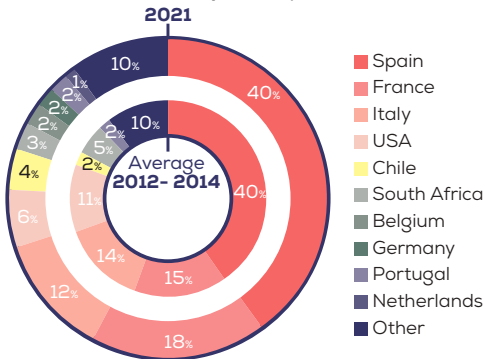
Sources: Wine Intelligence, IWSR, FAM, CIVP



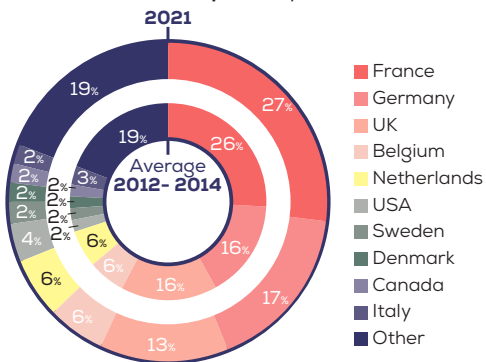
ROSÉ WINES WORLD TRACKING

Imports & exports

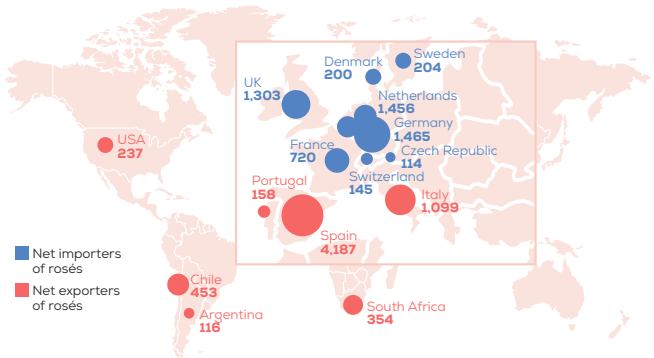
Rosé exports (by volume)



Rosé imports (by volume)



Import/export trade balance amongst countries with the biggest deficits and surpluses in 2021 (volume in millions of hl)



Sources: Wine Intelligence, IWSR, FAM, CIVP

Calendar of wine declarations

The CIVP's Economic Analysis Department launched a project in 2022: a calendar of French wine declaration due dates.

The goal was to present **all the due dates of the declarations that producers and merchants are required to submit**, on a single calendar that can be freely accessed online. It covers declaration for the CIVP, French Customs, appellation syndicates, FranceAgriMer and inspection agencies.

Of course, this calendar is provided for informational purposes only, so operators should contact the relevant organizations directly for more precise information about the different declarations.

calendrier-vitivini.vinsdeprovence.com

If you have any questions, please don't hesitate to contact Caroline Margaria, who is responsible for the project, at cmargaria@provencewines.com.



See your summary
calendar of
wine declarations



2022 figures from the Economic Analysis Department



40 participants on average in attendance at each wine region meeting*



Roughly **150** countries tracked



15 countries tracked in detail



40+ environmental newsletters published



Around **130** dashboards produced



10+ summary reports on thematic market studies disseminated



120 days spent on the hotline providing support for wine declarations, especially monthly summary declarations

* Wine region informational meetings, on topics such as food retailers in France and Rosé Wines World Tracking, for example

VINS DE PROVENCE



ECONOMIC ANALYSIS DEPARTMENT

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

eco@provencewines.com



CONSEIL INTERPROFESSIONNEL
DES VINS DE PROVENCE

Maison des Vins – RN 7 – CS 50002
83460 Les Arcs-sur-Argens – France

Tel: +33 (0)4 94 99 50 10