

KEY FIGU RES

2023



RHÔNE VALLEY
VINEYARDS



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INFORMATION METHODOLOGY & SYNTHESIS



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INFORMATION METHODOLOGY & SYNTHESIS

The first pages of this document contain some summary graphic elements. This document is then divided into 3 parts:

- a first part dedicated to production: Rhône Valley Vineyards production ; Rhône Valley Vineyards in France and in the world.
- a second part dedicated to the Rhône Valley Vineyards cellar despatches and their evolutions.
- a last section devoted to the sales of Rhône Valley Vineyards AOP wine with a particular focus on retail and export channels.

UNITS

Area data are in hectares - ha.

The data on harvest volumes, stocks, cellar despatches, bulk contracts and marketing are in hectolitres - hl.

TIME PERIOD

Production data is for the 2023 harvest. Bulk contracts, stocks and cellar despatches concern the 2022-2023 wine year (from 1 August to 31 July) except for Clairette de Die and Diois wines for which the cellar despatches are calculated over the calendar year. Marketing data (retail and export) relate to the calendar year 2023 (from January 1 to December 31).

DEFINITIONS

Production : harvest data

Cellar despatches: volumes marketed, in bulk or packaged (bottles or bag in box).

Fresh grapes: sometimes also called vinification, refers to wines vinified by winemakers from grapes and musts purchased fresh directly from producers.

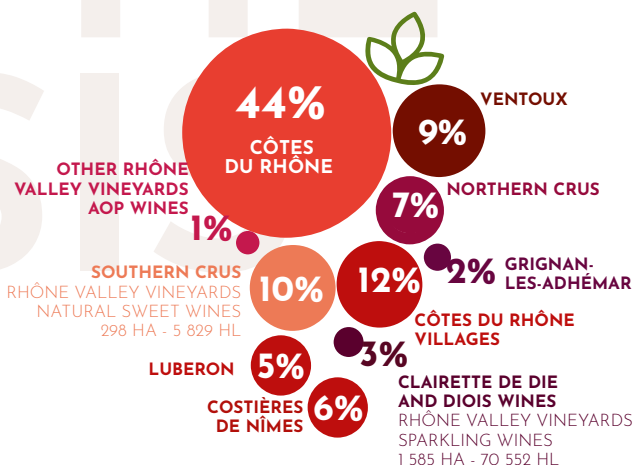
SUSTAINABLE DEVELOPMENT

All information on organic farming and/ or labels in sustainable development, are indicated in green. The organic data refer to certified organic agricultural (AB) production. HEV - High Environmental Value refers to the HEV 3 certification level.

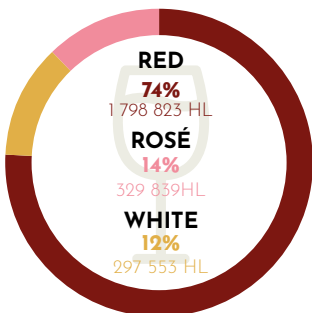
RHÔNE VALLEY VINEYARDS PRODUCTION IN 2023

-Sources: DR, DREV, producers unions, Inter Rhône 2023 (except Châteauneuf du Pape)

2023 HARVEST BREAKDOWN BY AOP



2023 HARVEST BREAKDOWN BY COLOUR



HARVEST YEAR ON YEAR EVOLUTION

2018	2019	2020	2021	2022	2023
2 766 465 HL	2 796 833 HL	2 708 642 HL	2 553 289 HL	2 608 964 HL	2 426 214 HL

5 YEARS
AVERAGE
2 643 401 HL
66 407 HA

7 038 RHÔNE
VALLEY VINEYARDS
AOP FARMS
IN 2023

Professional and non-professional
Holdings specialised or not in winegrowing



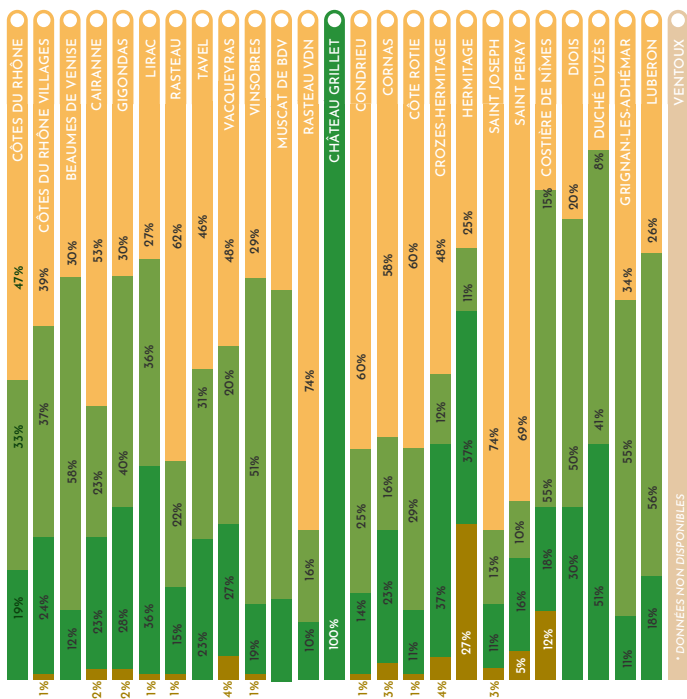
THE ORGANIC HARVEST IN 2023

BREAKDOWN OF 2023 HARVEST BY CERTIFICATION/LABEL OR CONVENTIONAL WINE-GROWING AND BY APPELLATION

Rhone Valley appellations for which we know the organic and HVE3 harvest volume, here is the breakdown, in hectolitres, of certified organic, HVE, and conventional volume for the 2023 harvest.

Sources: Producer unions, ODG, Inter Rhône.

- CONVENTIONAL HARVEST VOLUME (AS A PERCENTAGE)
- HVE3 LABEL HARVEST VOLUME (AS A PERCENTAGE)
- ORGANIC HARVEST VOLUME (AS A PERCENTAGE)
- BIODYNAMIC HARVEST VOLUME (AS A PERCENTAGE)



* DONNÉES NON DISPONIBLES

TOTAL RHONE VALLEY VINEYARDS



IN THE RHÔNE VALLEY VINEYARDS, HVE3 REPRESENT

33% IN VOLUME
31% IN AREA

OF THE 2023 HARVEST

IN THE RHÔNE VALLEY VINEYARDS, ORGANIC WINES REPRESENT

19% IN VOLUME
20% IN AREA

OF THE 2023 HARVEST

THE RHÔNE VALLEY VINEYARDS ENTITIES SELLING IN 2022/2023

Sources: DRM, SV12, Interprofessional contracts, Inter Rhône 2023 except Châteauneuf du Pape
In volume

BREAKDOWN OF RHÔNE VALLEY AOP WINE CELLAR DESPATCHES BY PRODUCTION ENTITY



COOPERATIVE WINERIES
62%

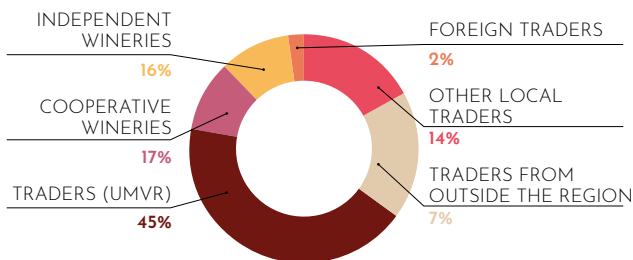


INDEPENDENT WINERIES
33%



VINIFICATION COMPANIES
5%

BREAKDOWN OF RHÔNE VALLEY AOP WINE VOLUME BY SALES ENTITY



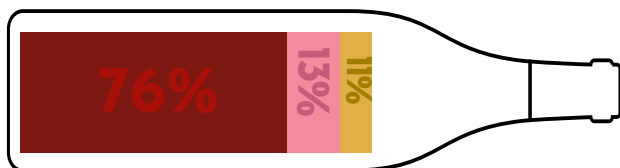
ENTITIES SELLING RHÔNE VALLEY AOP WINES (BULK OR PACKAGED)

	INDEPENDENT WINERIES	COOPERATIVE WINERIES	TRADING COMPANIES PRODUCERS UNIONS VINIFICATION COMPANIES
Rhône Valley Vineyards	1442	87	402
Côtes du Rhône	749	50	257
Côtes du Rhône Villages	393	39	147
CDR + CDR Villages	805	50	281
Côtes du Rhône Crus	610	24	189
Costières de Nîmes Clairette de Bellegarde	73	11	55
Côtes du Vivarais	12	5	4
Duché d'Uzès	35	8	6
Grignan-les-Adhémar	27	7	27
Luberon	63	10	37
Ventoux	133	13	67
Clairette de Die and Diois Wines	23	2	6

RHÔNE VALLEY AOP WINE CELLAR DESPATCHES IN 2022/2023

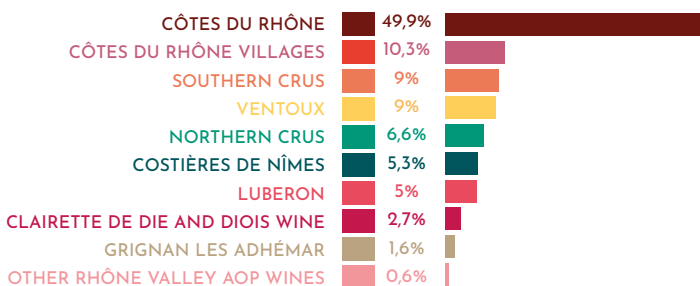
Sources: DRM, SVI2, interprofessional contracts, Inter Rhône 2023
except Châteauneuf du Pape.

BREAKDOWN OF CELLAR DESPATCHES BY COLOUR



RED: 1 812 476 hl | **ROSÉ :** 314 176 hl | **WHITE :** 267 278 hl

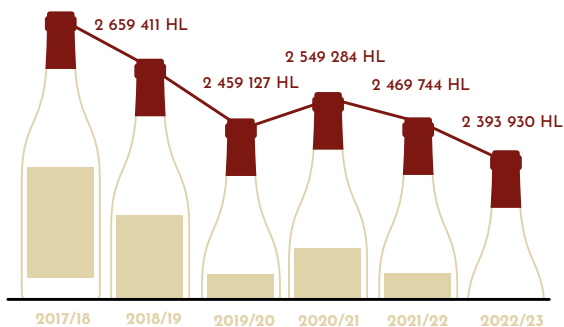
BREAKDOWN OF CELLAR DESPATCHES BY AOC



EVOLUTION OF THE RHÔNE VALLEY AOP WINE CELLAR DESPATCHES

Cellar despatches including Clairette de Die and Diois wines
but except Châteauneuf du Pape

2 817 448 HL



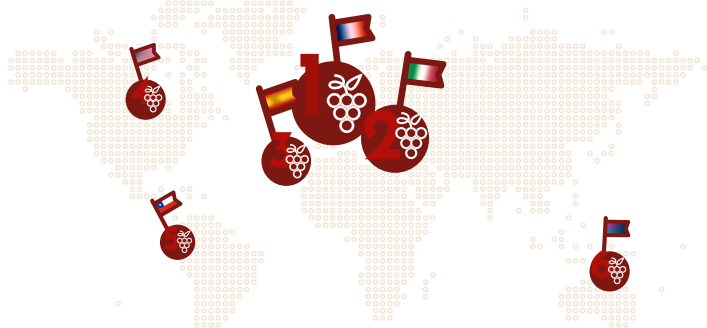
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RHONE VALLEY
VINEYARDS AOP WINES
PRODUCTION
IN 2023



WORLD WINE PRODUCTION IN 2023

Source : OIV 2023

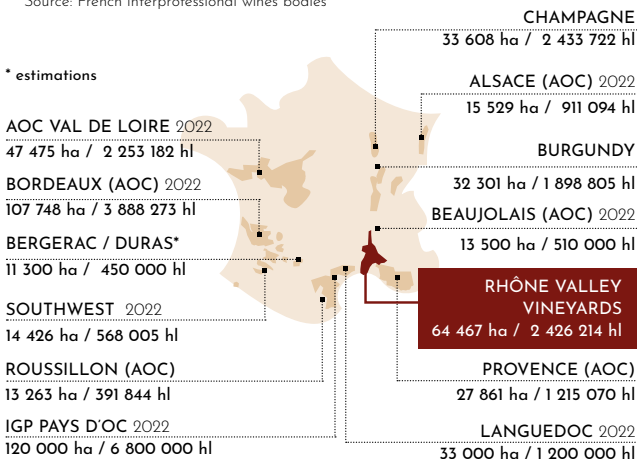


	FRANCE	45,8 MHLS	(-0,1%)	
	ITALY	43,9 MHLS	(-12%)	
	SPAIN	30,7 MHLS	(-14%)	
	USA	25,2 MHLS	(+12%)	
	CHILI	10 MHLS	(-20%)	
	AUSTRALIA	9,9 MHLS	(-24%)	

RHÔNE VALLEY VINEYARDS IN FRANCE IN 2023

Source: French interprofessional wines bodies

* estimations



FRANCE
THE WORLD'S
FIRST
BIGGEST
PRODUCER

RHÔNE VALLEY
VINEYARDS
THIRD
LARGEST
AOP WINE
REGION

WORLD
PRODUCTION
ESTIMATED
AT **242,2 MHLS**
IN 2023
i.e. **-8%**

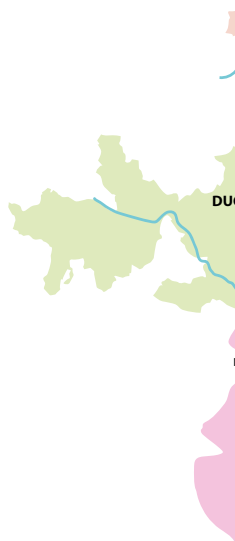


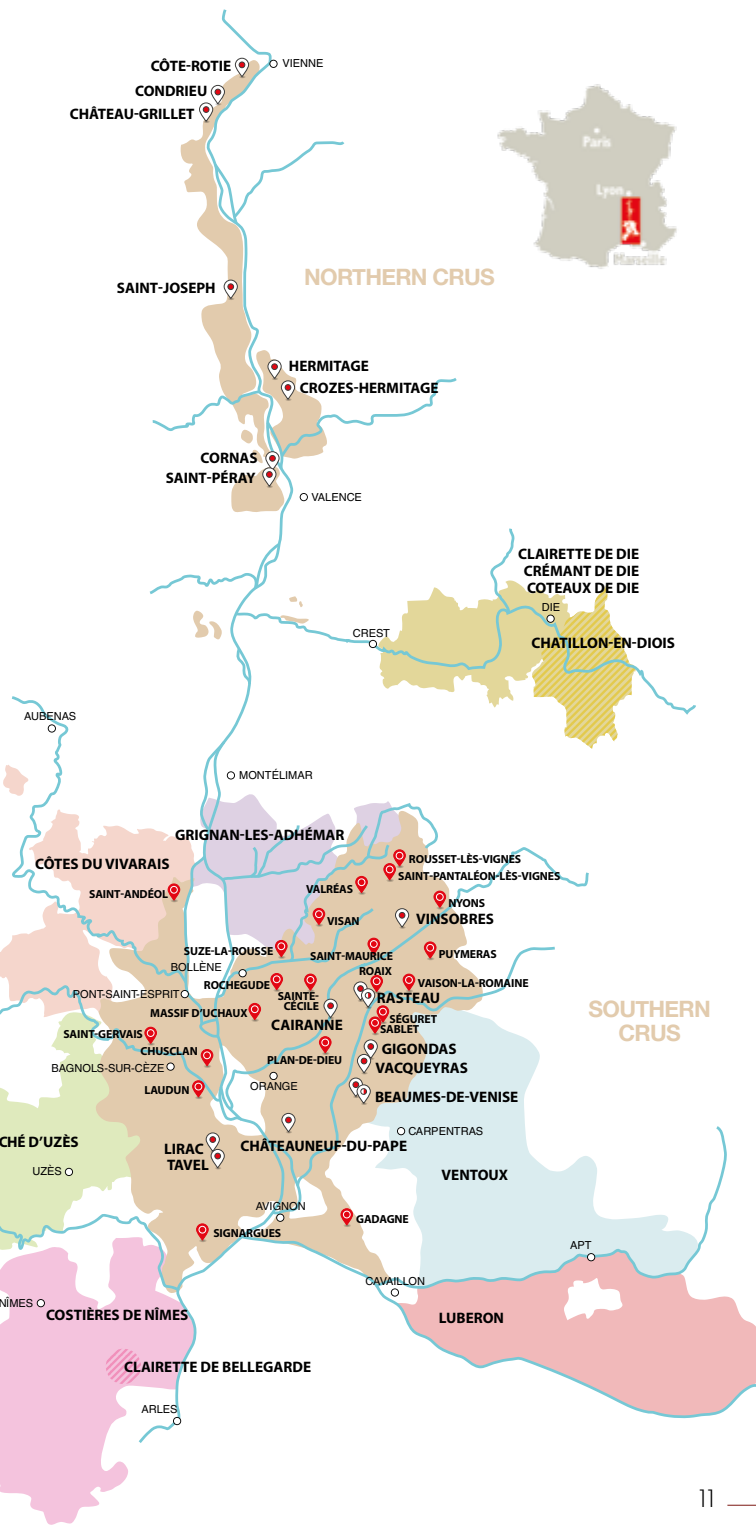
WINE PRODUCTION IN THE FRENCH DEPARTMENTS OF THE RHÔNE VALLEY

Source: French Customs Authorities,
Production 2023

	AOP	IGP	WWGI	TOTAL AVAILABLE - HL
Rhône / Loire / Isère	95%	2%	3%	819 178
Ardèche	20%	76%	4%	514 258
Drôme	79%	19%	2%	644 107
Gard	26%	66%	8%	2 922 503
Vaucluse	68%	28%	4%	1 826 837

-  Côtes du Rhône production area
-  AOP Clairette de Die and Diois Wines
-  Mixed area AOP Châtillon-en-Diois
-  AOP Costières de Nîmes
-  Mixed area AOP Clairette de Bellegarde
-  AOP Côtes du Vivarais
-  AOP Duché d'Uzès
-  AOP Grignan-les-Adhémar
-  AOP Luberon
-  AOP Ventoux
-  17 Côtes du Rhône Crus
-  2 Natural sweet wines
-  22 Côtes du Rhône Villages bearing a geographical name
-  Main cities







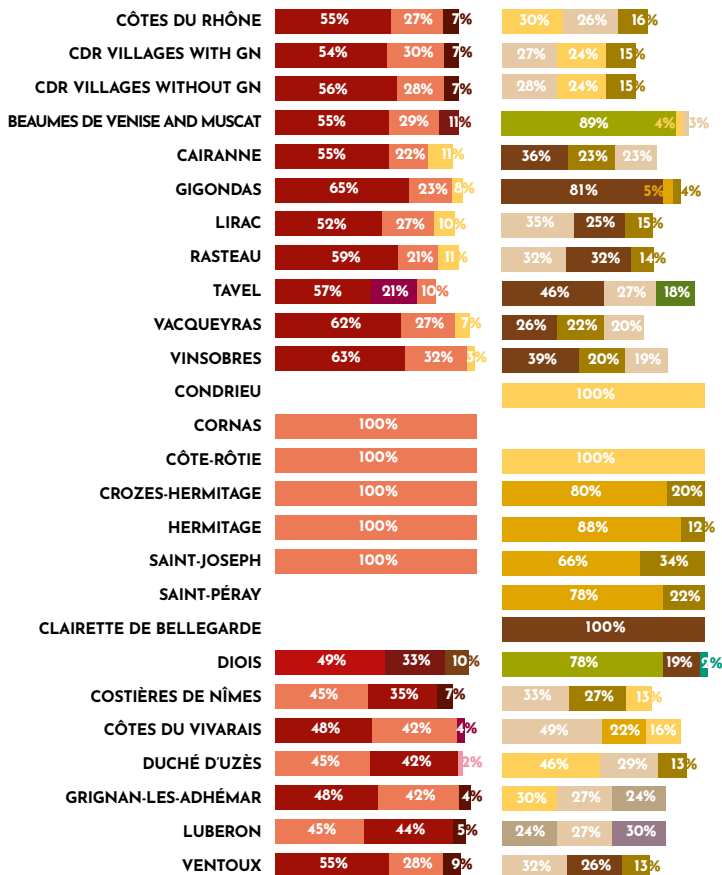
RHÔNE VALLEY VINEYARDS

MAIN GRAPE VARIETIES

Sources: CVI, Institut Rhodanien, production potential inventory

- GRENACHE BLACK
- SYRAH BLACK
- CARIGNAN BLACK
- MUSCAT BLACK
- MOURVÈDRE BLACK
- CINSAULT BLACK
- GAMAY
- PINOT BLACK
- MERLOT BLACK

- VIOGNIER
- GRENACHE WHITE
- ROUSSANNE WHITE
- MUSCAT WHITE
- CLAIRETTE
- BOURBOULENC WHITE
- MARSANNE
- UGNI
- VERMENTINO WHITE
- ALIGOTÉ WHITE



MAIN GRAPE VARIETIES AREA (IN HA) IN 2023

GRENACHE B	35 671 HA
SYRAH B	23 518 HA
CARIGNAN B	4 104 HA
MOURVEDRE B	2 871 HA
CINSAUT B	2 215 HA



GRENACHE W	2 060 HA
VIOGNIER W	1 549 HA
MUSCAT W	1 480 HA
À PETITS GRAINS	
CLAIRETTE W	1 336 HA
ROUSSANNE W	1 164 HA



RHÔNE VALLEY VINEYARDS PRODUCTION IN 2023

Sources: DR, DREV, producers unions - Inter Rhône 2023 Except Châteauneuf du

en ha, en hl et en hl/ha	Surface 2023	Mill 2023	Rende- ment	REDS		ROSÉS		WHITES	
TOTAL RHÔNE VALLEY VINEYARDS	64 467	2 426 214	38	1 798 823	74%	329 839	14%	297 553	12%
CDR + CDR Villages	37 726	1 371 454	36	1 179 132	86%	88 544	6%	103 779	8%
CDR + CDR Vill + Crus	49 824	1 790 583	36	1 521 679	85%	121 546	7%	147 358	8%
Côtes du Rhône	29 005	1 077 471	37	901 364	84%	86 704	8%	89 403	8%
Côtes du Rhône Villages	8 721	293 983	34	277 768	94%	1 840	1%	14 376	5%
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	2 488	81 516	33	78 611	96%	327	-	2 577	3%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	6 233	212 468	34	199 156	94%	1 512	1%	11 799	6%
Southern Crus	7 760	252 045	32	206 103	82%	33 002	13%	12 940	5%
Beaumes-de-Venise	711	25 233	35	25 233	100%	-	-	-	-
Cairanne	882	29 952	34	28 101	94%	-	-	1 851	6%
Gigondas	1 201	37 026	31	36 388	98%	231	1%	407	1%
Lirac	841	29 267	35	25 145	86%	667	2%	3 455	12%
Rasteau still wine	963	32 084	33	32 084	100%	-	-	-	-
Tavel	838	30 775	37	-	-	30 775	100%	-	-
Vacqueyras	1 472	43 419	29	40 401	93%	242	1%	2 776	6%
Vinsobres	554	18 460	33	18 460	100%	-	-	-	-
Muscat de BdV	282	5 335	19	68	1%	840	16%	4 427	83%
Rasteau VDN	16	494	30	223	45%	247	50%	24	5%
Northern Crus	4 337	167 083	39	136 444	82%	-	-	30 639	18%
Château-Grillet	4	121	30	-	-	-	-	121	100%
Condrieu	217	8 421	39	-	-	-	-	8 421	100%
Cornas	150	5 086	34	5 086	100%	-	-	-	-
Côte-Rôtie	337	12 601	37	12 601	100%	-	-	-	-
Crozes-Hermitage	2 007	81 389	41	72 107	89%	-	-	9 282	11%
Hermitage	136	4 977	37	3 368	68%	-	-	1 609	32%
Saint-Joseph	1 375	50 583	37	43 282	86%	-	-	7 301	14%
Saint-Péray	111	3 905	35	-	-	-	-	3 905	100%
Other Rhône Valley AOP Wines	14 643	635 632	43	277 145	44%	208 293	33%	150 195	24%
Clairette de Bellegarde	7	310	47	-	-	-	-	310	100%
Clairette de Die	1 545	68 608	44	-	-	-	-	68 608	100%
Châtillon-en-Diois	37	1 693	45	711	42%	203	12%	779	46%
Coteaux de Die	3	114	42	-	-	-	-	114	100%
Crémant de Die	40	1 944	49	-	-	-	-	1 944	100%
Costières de Nîmes	2 702	140 868	52	66 208	47%	59 164	42%	15 495	11%
Côtes du Vivarais	160	5 893	37	3 127	53%	2 155	37%	611	10%
Duché d'Uzès	338	10 523	31	5 672	54%	1 773	17%	3 078	29%
Grignan- les-Adhémar	1 228	44 706	36	31 912	71%	7 498	17%	5 295	12%
Luberon	3 159	130 744	41	32 283	25%	63 668	49%	34 793	27%
Ventoux	5 424	230 230	42	137 231	60%	73 830	32%	19 168	8%
SPIRITS WITH GEOGRAPHICAL INDICATION			86						
Mill 2022 (hl pure alcohol)									
Eau-de-vie de Marc des Côtes du Rhône									80
Eau-de-vie de vin des Côtes du Rhône									6



PRODUCTION BY APPELLATION : YEAR ON YEAR EVOLUTION

Sources: DR, DREV, ODG, producers unions - Inter Rhône 2023 Except Châteauneuf du Pape

in hl	Vintage					
	2018	2019	2020	2021	2022	2023
Total Rhône Valley Vineyards	2 766 465	2 796 833	2 708 642	2 553 289	2 608 964	2 426 214
CDR + CDR Villages	1 596 506	1 669 322	1 601 630	1 546 234	1 558 029	1 371 454
CDR + CDR Vill + Crus	1 989 617	2 052 255	2 000 753	1 932 531	1 950 957	1 790 583
Côtes du Rhône	1 280 240	1 332 125	1 310 738	1 271 382	1 251 477	1 077 471
Côtes du Rhône Villages	316 266	337 197	290 892	274 853	306 552	293 983
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	108 427	112 412	94 916	85 184	97 630	81 516
CDR VILLAGES WITH A GEOGRAPHICAL NAME	207 839	224 785	195 976	189 669	208 922	212 468
SOUTHERN CRUS	231 731	241 192	239 488	225 200	235 501	252 045
Beaumes-de-Venise	21 425	21 426	22 735	20 304	22 141	25 233
Cairanne	23 020	29 075	29 153	26 674	29 283	29 952
Gigondas	34 319	36 047	36 356	32 986	36 286	37 026
Lirac	23 864	21 004	20 022	23 330	19 945	29 267
Rasteau Still wine	28 746	32 299	32 311	31 747	32 742	32 084
Tavel	36 779	29 868	30 337	35 522	26 323	30 775
Vacqueyras	40 747	46 045	46 801	32 560	45 926	43 419
Vinsobres	16 361	18 943	16 219	17 223	17 443	18 460
Muscats de Beaumes-de-Venise	6 308	6 094	5 412	4 746	4 943	5 335
Rasteau VDN	162	391	142	108	469	494
NORTHERN CRUS	161 381	141 741	159 636	161 097	157 427	167 083
Château-Grillet	61	62	89	31	75	121
Condrieu	8 388	7 442	7 686	4 647	7 961	8 421
Cornas	4 918	5 128	5 243	5 530	5 040	5 086
Côte-Rôtie	12 763	12 121	11 467	9 544	12 326	12 601
Crozes-Hermitage	75 918	57 936	76 291	80 359	73 388	81 389
Hermitage	5 156	4 885	4 677	4 528	4 155	4 977
Saint-Joseph	51 111	50 203	50 890	52 959	50 896	50 583
Saint-Péray	3 065	3 964	3 294	3 498	3 586	3 905
OTHER RHONE VALLEY AOP WINES	776 847	744 577	707 888	620 758	658 007	635 632
Clairette de Bellegarde	269	263	180	262	223	310
Clairette de Die **	94 254	84 576	70 131	67 628	73 783	68 608
Châtillon-en-Diois**	2 035	1 898	1 662	1 444	1 829	1 693
Coteaux de Die**	55	73	56	51	100	114
Crémant de Die**	1 719	1 221	1 040	1 497	1 765	1 944
Costières de Nîmes	211 751	177 594	153 380	158 343	136 393	140 868
Côtes du Vivarais	10 872	8 819	6 920	6 221	5 668	5 893
Duché d'Uzès	10 490	10 642	9 584	10 000	10 694	10 523
Grignan-les-Adhémar	48 738	51 797	47 157	45 651	43 360	44 706
Luberon	151 391	154 454	160 641	127 881	136 951	130 744
Ventoux	245 273	253 240	257 137	201 780	247 241	230 230



AREAS OF THE RHÔNE VALLEY AOP WINES : YEAR ON YEAR EVOLUTION

Sources: DR, DREV, ODG, producers unions - Inter Rhône 2023 Except Châteauneuf du Pape

in ha	Vintage					
	2018	2019	2020	2021	2022	2023
Total Rhône Valley Vineyards	68 132	67 600	66 583	66 451	65 208	64 467
CDR + CDR Villages	39 754	39 433	39 419	39 191	38 286	37 726
CDR + CDR Vill + Crus	51 467	51 289	51 289	51 078	50 348	49 824
Côtes du Rhône	30 749	30 281	31 134	30 784	29 647	29 005
Côtes du Rhône Villages	9 005	9 152	8 286	8 406	8 639	8 721
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	2 956	2 923	2 636	2 468	2 655	2 488
CDR VILLAGES WITH A GEOGRAPHICAL NAME	6 049	6 229	5 650	5 938	5 984	6 233
SOUTHERN CRUS	7 709	7 805	7 748	7 702	7 789	7 760
Baumes-de-Venise	660	675	680	692	705	711
Cairanne	846	865	877	876	877	882
Gigondas	1 189	1 199	1 225	1 202	1 191	1 201
Lirac	795	857	818	796	854	841
Rasteau Still wine	953	951	940	961	942	963
Tavel	904	898	905	896	887	838
Vacqueyras	1 438	1 443	1 452	1 447	1 474	1 472
Vinsobres	563	570	531	522	547	554
Muscat de Baumes-de-Venise	355	332	314	305	295	282
Rasteau VDN	6	15	6	5	17	16
NORTHERN CRUS	4 004	4 051	4 121	4 186	4 273	4 337
Château-Grillet	3	3	3	3	4	4
Condrieu	200	203	209	206	215	217
Cornas	150	156	155	155	159	150
Côte-Rôtie	319	323	330	327	333	337
Crozes-Hermitage	1 768	1 778	1 818	1 869	1 964	2 007
Hermitage	136	140	134	134	136	136
Saint-Joseph	1 330	1 348	1 370	1 382	1 352	1 375
Saint-Péray	98	100	103	109	111	111
OTHER RHONE VALLEY AOP WINES	16 665	16 311	15 294	15 373	14 860	14 643
Clairette de Bellegarde	8	7	6	6	6	7
Clairette de Die **	1 629	1 582	1 559	1 404	1 441	1 545
Châtillon-en-Diois**	40	43	38	38	40	37
Coteaux de Die**	1	2	1	1	2	3
Crémant de Die**	30	23	21	31	33	40
Costières de Nîmes	3 948	3 680	2 844	3 230	2 859	2 702
Côtes du Vivarais	284	232	225	183	180	160
Duché d'Uzès	307	322	315	325	321	338
Grignan-les-Adhémar	1 354	1 318	1 270	1 165	1 211	1 228
Luberon	3 363	3 397	3 330	3 367	3 130	3 159
Ventoux	5 701	5 706	5 685	5 623	5 638	5 424

03

STOCKS, CELLAR
DESPATCHES
AND BULK
CONTRACTUALIZATION





PHYSICAL STOCKS OF RHÔNE VALLEY AOP WINES

Physical stocks at 31 July 2023.

Sources: DRM/DS, DS négoce (except Châteauneuf du Pape)

	PRODUCTION STOCKS		TRADERS STOCKS	
	Volume (in hl)	Evolution in %	Volume (in hl)	Evolution in %
TOTAL RHONE VALLEY VINEYARDS	2 575 631	+5%	772 258	+6%
CDR + CDR VILLAGES	1 580 908	+6%	436 269	+12%
CDR + CDR VILL + CRUS	2 001 706	+5%	639 799	+9%
Côtes du Rhône	1 224 579	+7%	379 610	+14%
Côtes du Rhône Villages	356 329	+4%	56 659	+2%
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	102 864	+3%	30 559	+8%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	253 465	+4%	26 100	-7%
SOUTHERN CRUS	293 975	+3%	73 856	+12%
Beaumes-de-Venise	20 915	-14%	4 970	+10%
Cairanne	35 889	+10%	9 827	-4%
Gigondas	44 677	+3%	23 202	+38%
Lirac	32 644	-1%	2 935	+38%
Rasteau Still wine	52 320	+6%	7 794	+24%
Tavel	18 070	+24%	2 165	+1%
Vacqueyras	47 704	+8%	16 494	-8%
Vinsobres	29 083	-3%	4 956	+1%
Muscat de Beaumes-de-Venise	11 329	-19%	1 512	-41%
Rasteau VDN	1 344	-7%	1	-91%
NORTHERN CRUS	126 823	+0,4%	129 674	0%
Château-Grillet	161	+22%	-	-
Condrieu	3 060	+19%	7 108	-2%
Cornas	5 916	+5%	6 079	-7%
Côte-Rôtie	12 331	+3%	16 150	+4%
Crozes-Hermitage	56 664	-1%	49 739	+2%
Hermitage	6 134	+17%	13 831	-1%
Saint-Joseph	40 431	-2%	34 087	-4%
Saint-Péray	2 126	-12%	2 680	+3%
OTHER RHONE VALLEY AOP WINES	573 925	+5%	132 459	-6%
Clairette de Bellegarde	353	-2%	21	-7%
Clairette de Die	105 313	+6%	29 082	+96%
Châtillon-en-Diois	1 179	+24%	593	+1%
Coteaux de Die	127	+69%	33	+19%
Crémant de Die	3 942	-13%	2 034	+60%
Costières de Nîmes	115 870	+1%	9 993	+5%
Côtes du Vivarais	6 179	-13%	1 072	-34%
Duché d'Uzès	10 420	+18%	1 161	+3%
Grignan-les-Adhémar	55 081	-2%	5 768	-22%
Luberon	109 076	+3%	33 396	-11%
Ventoux	166 385	+13%	49 306	-6%

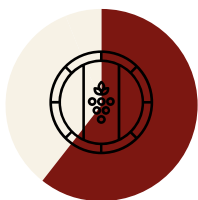


RHÔNE VALLEY AOP WINE CELLAR DESPATCHES IN 2022/2023

Sources: DRM, SVI2 - Inter Rhône 2023 - Except Châteauneuf du Pape

BREAKDOWN OF CELLAR DESPATCHES BY TYPES

BULK



62%

1 492 473 hl

OF WHICH:



PACKAGED



33%

771 562 hl

OF WHICH:



FRESH GRAPES



5%

126 677 hl

OF WHICH:





RHÔNE VALLEY AOP WINE

CELLAR DESPATCHES IN 2022/2023

Sources: DRM, SV12 - Inter Rhône 2023 - except Châteauneuf du Pape

in hl	Bulk	Packaged	Fresh grapes	Other despatches	Total cellar despatches
TOTAL RHÔNE VALLEY VINEYARDS	1 492 473	771 562	126 677	3 218	2 393 930
CDR + CDR VILLAGES	1 035 000	355 731	48 017	1 534	1 440 281
CDR + CDR VILLAGES + CRUS	1 156 245	551 308	105 137	2 504	1 815 194
Côtes du Rhône	886 766	271 011	34 957	1 098	1 193 833
Côtes du Rhône Villages	148 234	84 720	13 059	435	246 448
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	79 237	19 068	7 915	80	106 300
CDR VILLAGES WITH A GEOGRAPHICAL NAME	68 997	65 652	5 144	355	140 148
SOUTHERN CRUS	88 276	114 613	12 995	445	216 328
Beaumes-de-Venise	10 561	13 247	1 277	34	25 119
Cairanne	8 564	12 958	3 405	56	24 982
Gigondas	17 107	14 749	2 161	75	34 091
Lirac	4 648	12 105	-	74	16 827
Rasteau Still wine	15 056	12 594	1 004	46	28 701
Tavel	6 469	16 479	418	33	23 399
Vacqueyras	16 216	21 884	3 981	76	42 157
Vinsobres	6 812	6 386	599	30	13 826
Muscat de Beaumes-de-Venise	2 648	3 867	150	18	6 682
Rasteau VDN	197	342	-	4	543
NORTHERN CRUS	32 968	80 964	44 126	526	158 585
Château-Grillet					
Condrieu	877	1 792	4 698	31	7 398
Cornas	664	2 855	1 620	47	5 185
Côte-Rôtie	1 846	4 701	5 323	48	11 918
Crozes-Hermitage	15 427	41 952	16 677	125	74 181
Hermitage	929	1 312	2 091	20	4 352
Saint-Joseph	13 000	26 308	11 983	231	51 522
Saint-Péray	225	2 046	1 735	23	4 029
OTHER RHONE VALLEY AOP WINES	336 228	220 254	21 539	715	578 736
Clairette de Bellegarde	23	172	-	-	195
Clairette de Die*	10 419	41 408	10 023	39	61 889
Châtillon en Diois*	-	1 273	-	2	1 274
Coteaux de Die*	18	43	-	3	63
Crémant de Die*	133	1 430	-	15	1 578
Costières de Nîmes	80 197	47 545	-	115	127 857
Côtes du Vivarais	3 808	1 318	103	37	5 266
Duché d'Uzès	1 231	7 059	159	39	8 488
Grignan Les Adhémar	18 187	20 254	255	66	38 762
Luberon	87 826	30 976	-	159	118 961
Ventoux	134 387	68 776	11 000	240	214 403



EVOLUTION OF RHÔNE VALLEY AOP WINE CELLAR DESPATCHES

Sources: DRM, SV12 - Inter Rhône 2023 - except Châteauneuf du Pape

In hl	Campaign					Evolution	Evolution %
	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023		
TOTAL RHÔNE VALLEY VINEYARDS	2 659 411	2 459 127	2 549 284	2 469 744	2 393 930		-3%
CDR + CDR VILLAGES	1 583 170	1 460 046	1 504 186	1 461 289	1 440 281		-1%
CDR + CDR VILL + CRUS	1 949 034	1 807 428	1 884 065	1 856 510	1 815 194		-2%
Côtes du Rhône	1 314 003	1 217 561	1 244 230	1 204 269	1 193 833		-1%
Côtes du Rhône Villages	269 167	242 484	259 956	257 020	246 448		-4%
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	121 215	118 118	123 635	112 723	106 300		-6%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	147 952	124 367	136 321	144 298	140 148		-3%
SOUTHERN CRUS	218 491	207 938	228 012	230 933	216 328		-6%
Beaumes-de-Venise	22 867	20 008	23 946	23 119	25 119		+9%
Cairanne	20 231	21 284	25 333	26 499	24 982		-6%
Gigondas	33 830	33 871	35 418	38 061	34 091		-10%
Lirac	16 563	16 186	18 093	20 604	16 827		-18%
Rasteau Still wine	26 528	27 145	27 925	27 057	28 701		+6%
Tavel	33 247	28 729	31 810	32 345	23 399		-28%
Vaqueyras	45 108	41 156	43 467	42 610	42 157		-1%
Vinsobres	12 036	12 281	14 903	13 584	13 826		+2%
Muscat de Beaumes-de-Venise	7 421	6 872	6 719	6 567	6 682		+2%
Rasteau VDN	661	408	398	486	543		+12%
NORTHERN CRUS	147 374	139 445	151 867	164 288	158 585		-3%
Château-Grillet							
Condrieu	7 609	6 941	7 452	5 521	7 398		+34%
Cornas	4 602	4 402	5 154	5 385	5 185		-4%
Côte-Rôtie	10 912	10 869	11 176	10 858	11 918		+10%
Crozes-Hermitage	69 070	63 044	72 916	81 231	74 181		-9%
Hermitage	3 899	4 207	4 218	4 502	4 352		-3%
Saint-Joseph	48 363	46 699	47 819	53 116	51 522		-3%
Saint-Péray	2 919	3 284	3 132	3 675	4 029		+10%
OTHER RHONE VALLEY AOP WINES	710 377	651 698	665 219	613 233	578 736		-6%
Clairette de Bellegarde	214	176	237	230	195		-15%
Clairette de Die*	78 507	65 275	72 442	62 032	61 889		=
Châtillon en Diois*	1 473	1 646	2 112	1 622	1 274		-21%
Coteaux de Die*	49	62	65	43	63		+47%
Crémant de Die*	1 877	1 497	1 322	1 434	1 578		+10%
Costières de Nîmes	188 552	154 360	159 873	140 110	127 857		-9%
Côtes du Vivarais	7 625	6 914	7 157	6 027	5 266		-13%
Duché d'Uzès	6 854	6 790	8 357	8 605	8 488		-1%
Grignan-les-Adhémar	47 531	37 089	42 171	42 408	38 762		-9%
Luberon	146 753	136 754	130 425	136 374	118 961		-13%
Ventoux	230 941	241 135	241 058	214 349	214 403		=



EVOLUTION OF RHÔNE VALLEY AOP WINE BULK CONTRACTUALIZATION

Sources : Contrats interprofessionnels, Inter Rhône 2023 - hors Châteauneuf du Pape

In hl	Campaign					Evol N-1
	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023	
TOTAL RHÔNE VALLEY VINEYARDS	1 634 026	1 542 411	1 646 135	1 460 443	1 448 100	-6%
Côtes du Rhône	991 556	918 482	961 375	870 490	829 666	-5%
Côtes du Rhône Villages	143 705	129 766	161 217	158 682	140 458	-11%
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	81 462	80 225	98 896	94 456	70 539	-25%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	62 243	49 540	62 321	64 226	69 918	+9%
SOUTHERN CRUS**	83 396	67 745	82 696	72 429	140 907	-1%
Beaumes-de-Venise**	3 628	3 120	5 354	4 230	20 561	+30%
Cairanne**	10 939	8 074	10 822	10 338	7 710	-36%
Gigondas**	15 864	16 375	17 023	17 666	21 415	+9%
Lirac	4 995	4 213	4 157	4 741	4 638	-2%
Rasteau Still wine**	10 051	9 589	10 285	9 417	38 621	-6%
Tavel	14 874	10 817	14 176	8 866	7 218	-19%
Vacqueyras**	12 093	11 090	16 112	10 445	28 179	+15%
Vinsobres	10 262	3 857	4 102	6 323	6 944	+7%
Muscat de Beaumes-de-Venise**	690	612	665	404	4 863	-44%
Rasteau VDN					759	
NORTHERN CRUS	26 378	27 481	30 172	31 672	33 004	+4%
Château-Grillet						
Condrieu	1 115	976	1 194	789	921	+17%
Cornas	297	370	398	659	644	-2%
Côte-Rôtie	2 254	3 193	3 407	1 878	2 065	+10%
Crozes-Hermitage	10 281	10 560	12 638	15 471	15 425	=
Hermitage	695	798	856	1 002	932	-7%
Saint-Joseph	11 621	11 340	11 430	11 610	12 788	+10%
Saint-Péray tranquille	116	243	249	264	230	-13%
OTHER RHONE VALLEY AOP WINES	388 991	398 938	410 675	327 171	304 065	-10%
Clairette de Bellegarde						
Clairette de Die*	2 274	14 055	18 982	7 050	4 602	-35%
Châtillon en Diois*		100	297	48	-	-100%
Coteaux de Die*		-	13	15	6	
Crémant de Die*	23	100	10	82	95	+16%
Costières de Nîmes	102 782	101 096	103 262	83 671	75 128	-10%
Côtes du Vivarais	6 615	6 120	7 526	3 579	4 409	+23%
Duché d'Uzès	647	800	709	659	892	+35%
Grignan-les-Adhémar	16 600	17 590	25 074	17 547	17 144	-2%
Luberon	119 974	117 663	98 418	96 479	78 849	-18%
Ventoux	140 076	141 415	156 385	118 042	122 940	-3%

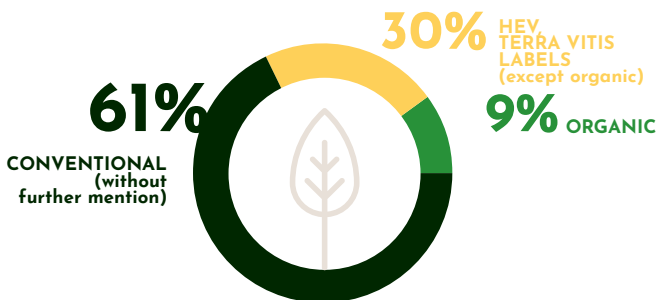
* Entry into the interprofession on 1 January 2019

** Corrected changes in AOC (excluding operators having changed their process)

BULK CONTRACTUALIZATION WITH SUSTAINABLE DEVELOPMENT LABELS

Sources: Interprofessional contracts - Inter Rhône 2023 - except Châteauneuf du Pape

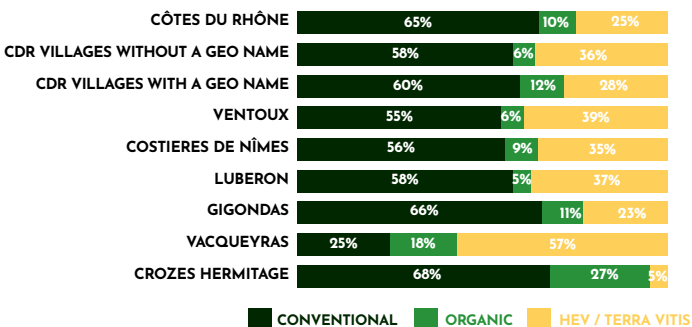
BULK CONTRACTUALIZATION: BREAKDOWN OF THE SUSTAINABLE DEVELOPMENT LABELS



EVOLUTION OF THE BULK CONTRACTUALIZATION WITH ORGANIC AND SUSTAINABLE DEVELOPMENT LABELS

	VOLUME	EVOLUTION VS N-1	EVOLUTION VS N-5
Total	1 448 100	-1%	-12%
Conventional	877 383	-12%	-31%
Organic	134 065	-7%	-11%
HEV / Terra Vitis	436 652	+35%	-

CONTRACTUALISED VOLUMES WITH SUSTAINABLE DEVELOPMENT LABELS



30%
OF CONTRACTUALISED VOLUMES ON THE 2022-2023 CAMPAIGN WERE HEV AND/OR TERRA VITIS CERTIFIED

04

SALES AND
EXPORTS



SALES OF RHÔNE VALLEY AOP WINES BY DISTRIBUTION CHANNELS

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

BREAKDOWN BY DISTRIBUTION CHANNEL IN 2023

by volume, in millions of bottles.

Sources : IRI, Kantar, French Customs Authorities, Inter Rhône estimates

SUPERMARKETS FRANCE



38%

898 566 hl
120 M bottles

including 152 370 hl
discounters (french)

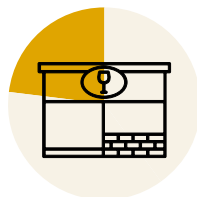
EXPORT



33%

796 193 hl
106 M bottles

TRADITIONNAL CHANNELS DIRECT SALES, HORECA, LIQUOR STORE



29%

699 171 hl
93 M bottles

TOP 10 EXPORT DESTINATIONS FOR RHONE VALLEY AOC WINES IN 2023



	BELGIUM	18%
	UK	15%
	USA	13%
	CANADA	10%
	GERMANY	8%
	SWEDEN	6%
	CHINA	4%
	SWITZERLAND	4%
	DENMARK	4%
	NETHERLANDS	3%



SALES OF RHÔNE VALLEY AOP WINES BY DISTRIBUTION CHANNELS

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

ESTIMATED BREAKDOWN OF RHÔNE VALLEY AOP WINE SALES BY DISTRIBUTION CHANNELS

In volume	Super- markets discounters	Trad channels, direct sales and others	Export	Reference Volume in hl	Source
Côtes du Rhône	33%	33%	34%	1 193 833	Estimation IR 2023
Côtes du Rhône Villages	33%	34%	33%	246 448	Estimation IR 2023
Beaumes de Venise	47%	49%	4%	25 119	Estimation IR 2023
Cairanne	27%	32%	41%	24 982	Estimation IR 2023
Gigondas	18%	35%	47%	34 091	Estimation IR 2023
Lirac	8%	46%	46%	16 827	Estimation IR 2023
Rasteau Still wine	28%	45%	27%	28 701	Estimation IR 2023
Tavel	48%	18%	34%	23 399	Estimation IR 2023
Vacqueyras	21%	53%	26%	42 157	Estimation IR 2023
Vinsobres	18%	61%	21%	13 826	Estimation IR 2023
Muscat de Beaumes-de-Venise	46%	49%	5%	6 682	Estimation IR 2023
Rasteau VDN	9%	90%	1%	543	Estimation IR 2023
Condrieu	5%	71%	24%	7 398	Estimation IR 2023
Cornas	6%	66%	28%	5 185	Estimation IR 2023
Côte-Rôtie	4%	72%	24%	11 918	Estimation IR 2023
Crozes-Hermitage	21%	59%	20%	74 181	Estimation IR 2023
Hermitage	2%	56%	42%	4 352	Estimation IR 2023
Saint Joseph	17%	70%	13%	51 522	Estimation IR 2023
Saint Péray	5%	81%	14%	4 029	Estimation IR 2023
Clairette de Bellegarde	4%	89%	7%	195	Estimation IR 2023
Clairette de Die	64%	21%	15%	61 889	Estimation IR 2023
Costières de Nîmes	31%	40%	29%	143 965	Estimation IR 2023
Côtes du Vivarais	31%	66%	3%	5 266	Estimation IR 2023
Duchés d'Uzès	7%	84%	9%	8 488	Estimation IR 2023
Grignan les Adhémar	21%	64%	15%	38 762	Estimation IR 2023
Luberon	33%	35%	32%	118 961	Estimation IR 2023
Ventoux	40%	33%	27%	214 403	Estimation IR 2023

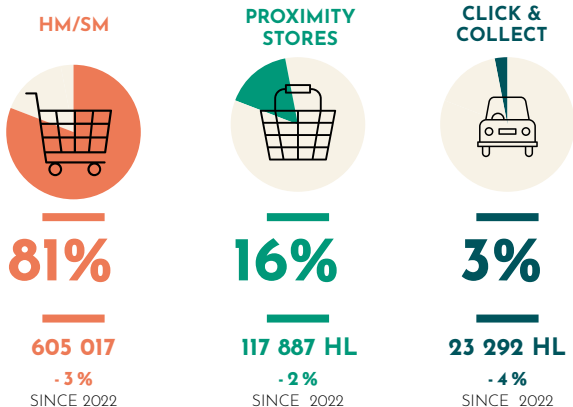
BREAKDOWN OF RHÔNE VALLEY AOP WINE EXPORTS BY COUNTRY

In volume	Belgium	USA	United Kingdom	Sweden	Germany	Canada	China	Denmark	Netherlands	Switzerland	Japan	Other countries
Côtes du Rhône	20%	16%	10%	8%	7%	8%	5%	5%	3%	4%	1%	13%
Côtes du Rhône Villages	13%	16%	36%	5%	4%	1%	3%	2%	6%	2%	1%	9%
Southern Crus	24%	18%	10%	9%	6%	2%	3%	3%	3%	7%	3%	12%
Northern Crus	7%	20%	15%	6%	3%	2%	3%	1%	5%	10%	6%	21%
Costières de Nîmes	17%	9%	10%	8%	16%	1%	13%	4%	4%	3%	1%	14%
Grignan-les-Adhémar	17%	2%	2%	1%	7%	0%	26%	0%	33%	1%	9%	3%
Luberon	15%	2%	13%	10%	32%	1%	1%	1%	2%	1%	3%	19%
Ventoux	20%	3%	12%	43%	5%	1%	2%	5%	2%	1%	1%	6%
Clairette and Crémant de Die	55%	1%	4%	0%	0%	0%	0%	0%	5%	27%	1%	5%

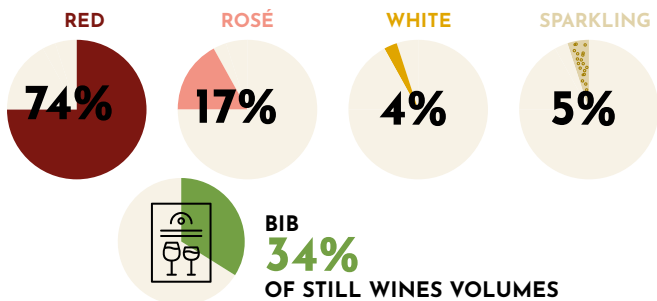
THE FRENCH MARKET : SALES OF RHÔNE VALLEY AOP WINES IN THE SUPERMARKET CHANNEL

Source: CIRCANA Panels excluding Discounters - Still wines and sparkling wines

BREAKDOWN BY CHANNEL IN 2023







BREAKDOWN BY COLOUR IN 2023



THE DYNAMISM OF THE RHÔNE VALLEY WHITE WINES

Sources: CIRCANA Panels excluding Discounters

Still wines only - Annual percentage change, by colour and in volume

	2019	2020	2021	2022	2023
 TOTAL Rhône Valley Vineyards	-7%	-1%	-6%	-5%	-3%
 RED	-9%	-1%	-5%	-7%	-2%
 ROSÉ	-2%	+0,4%	-13%	=	-6%
 WHITE	+2%	+8%	+6%	+9%	+5%

€491
MILLIONS

99
MILLIONS
BOTTLES



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

Source: CIRCANA Panels HMSM+, excluding Discounters - Still wines and sparkling wines

HYPER / SUPERMARKETS IN 2023

excluding Discounters and click&collect

$$WD = \frac{\text{TOTAL SALES OF STORES WHERE THE PRODUCT IS PRESENT}}{\text{TOTAL SALES OF ALL STORES THAT DISTRIBUTE THIS CATEGORY OF PRODUCT}} \times 100$$

** WD - Weighted Distribution: Share of category sales of the stores handling the specific product.

The average price is calculated from the volumes sold in store and also includes sales in BIB

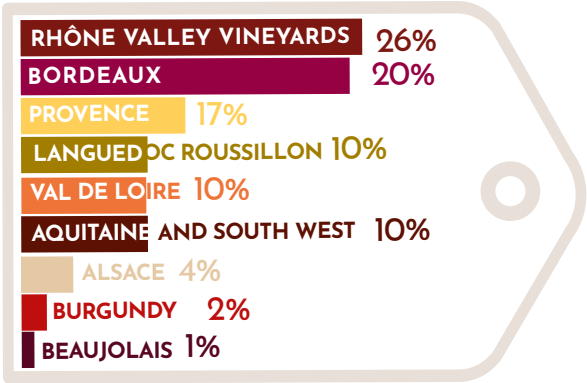
	WD**	"VOLUME (IN HL)"	VOLUME EVOLUTION	AVG PRICE €/BOTTLE INC VAT	AVG PRICE EVOLUTION
Côtes du Rhône	100	301 307	-0,5%	3,82	+5,7%
Côtes du Rhône Villages	99	62 125	-0,4%	5,27	+4,6%
Beaumes-de-Venise	77	9 819	-0,7%	7,95	+5,4%
Cairanne	60	5 702	-2,6%	7,04	+7,7%
Gigondas	77	5 211	-9,3%	13,97	+6,6%
Lirac	27	1 238	+0,4%	7,44	+1,3%
Rasteau Still wine	75	6 833	-3,4%	7,92	+6,1%
Tavel	84	9 886	-11,2%	7,05	+6,1%
Vacqueyras	77	7 942	-6,1%	10,42	+8,0%
Vinsobres	30	2 072	-0,4%	6,79	+4,5%
Condrieu	17	324	+1,0%	30,55	+3,1%
Cornas	17	295	-2,2%	24,98	+2,9%
Côte-Rôtie	22	477	-24,5%	42,03	+9,4%
Crozes-Hermitage	88	12 197	-10,7%	11,31	+8,3%
Hermitage	7	97	-6,4%	35,95	+5,5%
Saint Joseph	71	7 531	-3,5%	14,34	+7,2%
Saint Péray tranquille	6	173	-1,8%	11,43	-2,7%
Costières de Nîmes	87	29 607	-12,7%	3,36	+7,8%
Côtes du Vivarais	7	1 385	-12,0%	3,02	+3,7%
Duché d'Uzès	3	532	-9,7%	6,62	+7,2%
Luberon	58	7 332	-1,0%	3,70	+11,0%
Grignan-les-Adhémar	88	29 826	-6,0%	4,09	+7,3%
Ventoux	98	64 775	-5,6%	3,50	+8,0%
Clairette de Die	98	33 879	-1,9%	6,14	+5,1%
Crémant de Die	4	188	-1,1%	6,15	+1,8%



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

Sources: CIRCANA Panels excluding Discounters, Inter Rhône

2023 MARKET SHARE IN VOLUME



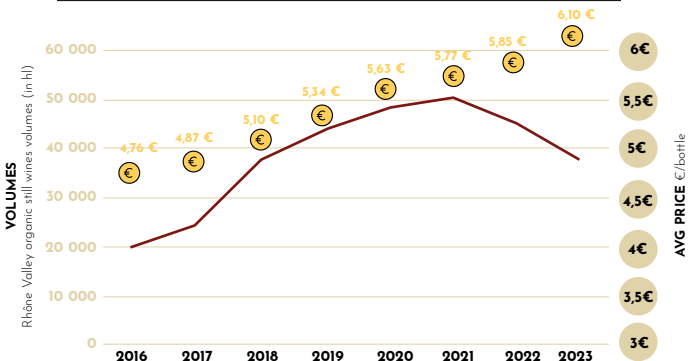
SALES OF ORGANIC WINES IN SUPERMARKETS HAS DECLINED SIGNIFICANTLY OVER THE PAST YEAR.

THE AOP CATEGORY IN SUPERMARKETS SHOWS A DECREASE OF **-13% IN VOLUME AND 9% IN VALUE.**

RHÔNE VALLEY VINEYARDS SALES HAVE DROPPED SHARPLY BUT THE REGION **REMAINS STRONG LEADER WITH 26% OF ORGANIC AOP SALES.**

THE ORGANIC AOC WINES FROM THE RHONE VALLEY HAVE DECLINED BY -10% IN VOLUME AND -6% IN VALUE.

TRENDS IN SALES OF RHONE VALLEY ORGANIC STILL WINES IN HYPER AND SUPERMARKETS

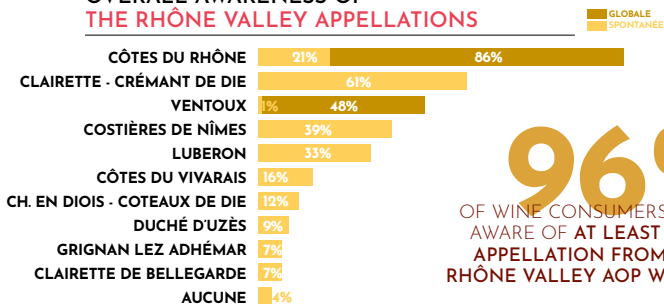




TRADITIONNELS CIRCUITS

Sources : Etudes CNIV/Symetris - Baromètres France AUDIREP - dec 2023

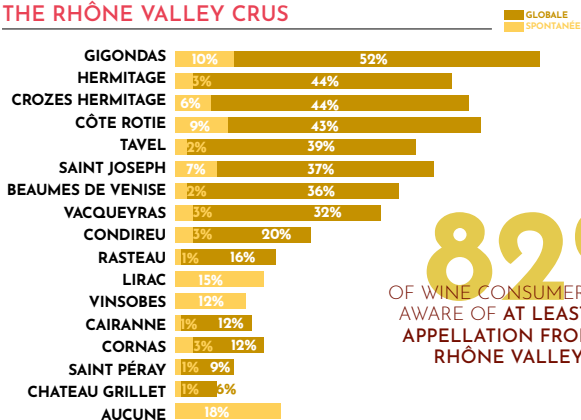
OVERALL AWARENESS OF THE RHÔNE VALLEY APPELLATIONS



96%

OF WINE CONSUMERS ARE AWARE OF AT LEAST ONE APPELLATION FROM THE RHÔNE VALLEY AOP WINES

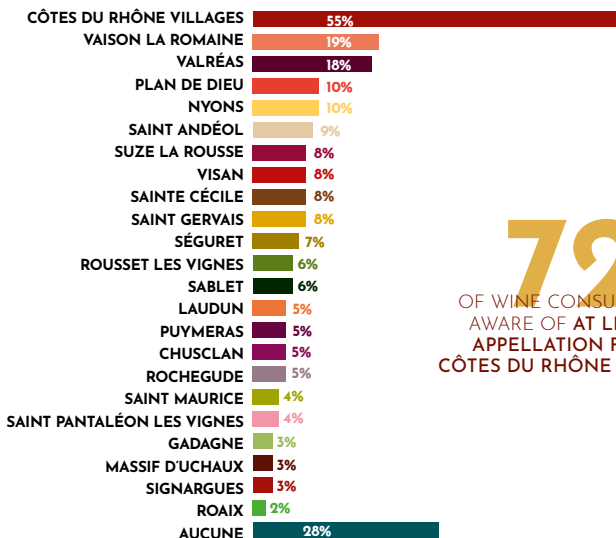
OVERALL AWARENESS OF THE RHÔNE VALLEY CRUS



82%

OF WINE CONSUMERS ARE AWARE OF AT LEAST ONE APPELLATION FROM THE RHÔNE VALLEY CRUS

OVERALL AWARENESS OF THE CÔTES DU RHÔNE VILLAGES



72%

OF WINE CONSUMERS ARE AWARE OF AT LEAST ONE APPELLATION FROM THE CÔTES DU RHÔNE VILLAGES

EXPORTS OF RHÔNE VALLEY AOP WINES

Sources : French Customs Authorities, Inter Rhône estimates - Still wines and sparkling wines. Chateaufort du Pape included

BREAKDOWN OF RHÔNE VALLEY AOP WINE EXPORTS BY VOLUME IN 2023

In hl	Côtes du Rhône (rég, vill, crus)		Other Rhône Valley AOP wines		TOTAL Rhône Valley 2023	
	Red/Rosés	Whites	Reds/Rosés	Whites (with Clairette de Die and Diois Wines)		Breakdown as %
Belgium	115 197	7 340	16 706	5 317	144 560	18%
United Kingdom	104 349	4 936	8 045	780	118 110	15%
USA	92 754	4 672	4 773	2 246	104 444	13%
Canada	37 493	7 022	23 449	9 117	77 081	10%
Germany	42 139	2 432	16 654	1 561	62 786	8%
Sweden	40 200	2 665	984	323	44 172	6%
China	22 877	727	7 278	397	31 278	4%
Norway	24 434	469	1 595	2 889	29 387	4%
Switzerland	23 957	1 546	3 095	361	28 959	4%
Denmark	20 408	2 542	2 665	1 190	26 805	3%
The Netherlands	23 187	395	2 489	25	26 097	3%
Japan	7 710	1 177	1 870	985	11 742	1%
Other Europe	39 593	3 187	4 640	1 045	48 465	6%
Other Countries	33 764	2 587	4 191	1 767	42 309	5%
TOTAL	628 062	41 696	98 433	28 002	796 193	100%

TOTAL RHÔNE VALLEY VINEYARDS AOP WINES (ALL COLOURS)

	VOLUME in hl			VALUE in millions of euros		
	2022	2023	Evol	2022	2023	Evol
Belgium	156 345	144 560	📉 -8%	64	60	📉 -7%
United Kingdom	135 904	118 110	📉 -13%	86	79	📉 -9%
USA	126 104	104 444	📉 -17%	117	98	📉 -16%
Canada	76 594	77 081	📈 1%	54	51	📉 -5%
Germany	65 020	62 786	📉 -3%	35	34	📉 -4%
Sweden	52 254	44 172	📉 -15%	29	26	📉 -10%
China	43 187	31 278	📉 -28%	25	19	📉 -24%
Switzerland	30 160	29 387	📉 -3%	29	28	📉 -2%
Denmark	28 765	28 959	📈 1%	18	17	📉 -7%
Norway	28 428	26 805	📉 -6%	15	14	📉 -13%
The Netherlands	27 880	26 097	📉 -6%	16	15	📉 -9%
Japan	13 463	11 742	📉 -13%	12	12	📉 -4%
Other Europe	48 605	48 465	→ 0%	30	30	📉 -1%
Other Countries	53 055	42 309	📉 -20%	55	48	📉 -13%
TOTAL	885 764	796 193	📉 -10%	587	529	📉 -10%

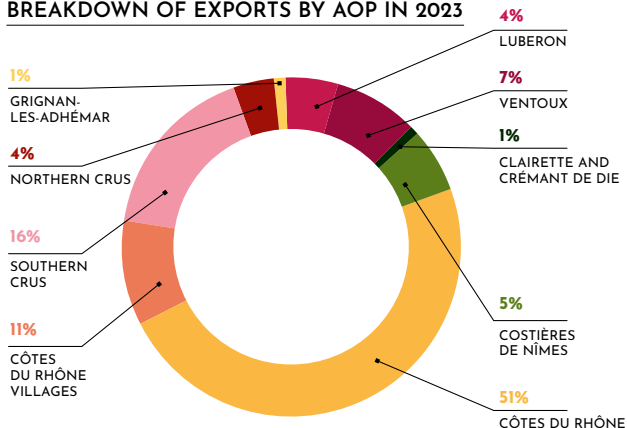
€529 MILLIONS

106 MILLION BOTTLES

EXPORTS OF RHÔNE VALLEY AOP WINES

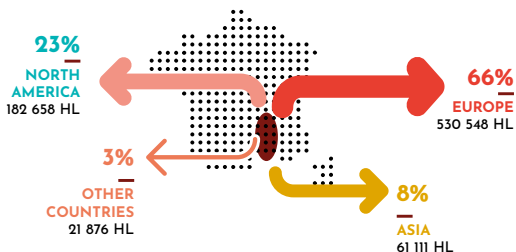
Sources : French Customs Authorities, Inter Rhône estimates
Still wines and sparkling wines. Chateauneuf du Pape included

BREAKDOWN OF EXPORTS BY AOP IN 2023



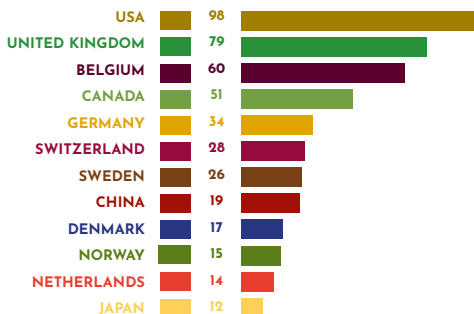
BREAKDOWN OF EXPORTS BY GEOGRAPHICAL REGION IN 2023

En hl. Sources : Douanes Françaises, estimations Inter Rhône
Vins Tranquilles et Vins Effervescents. Y compris Châteauneuf du Pape



BREAKDOWN BY VALUE IN 2023

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





RHÔNE VALLEY VINEYARDS



**64 467 HECTARES
AND 2,4 MILLIONS
HECTOLITERS
PRODUCED IN
THE 2023 VINTAGE**



**319 MILLIONS BOTTLES
SOLD IN 2023**



**7 038 PRODUCTION
UNITS**



**402 TRADING
COMPANIES**



**186 EXPORT
DESTINATIONS
AROUND THE
WORLD CONSUMED
RHÔNE VALLEY
WINES IN 2023**



**IN THE RHÔNE VALLEY
VINEYARDS, ORGANIC
WINES REPRESENT
19% IN VOLUME
AND 20% IN AREA
OF THE 2023 HARVEST**



**MORE THAN 10 BOTTLES
OF RHÔNE VALLEY WINES
ARE CONSUMED EVERY
SECOND**

**HVE 3 LABEL REPRESENTS
33% OF VOLUMES
AND 31% OF AREAS
OF THE 2023 HARVEST.**

**FOR FURTHER INFORMATION, PLEASE
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**For Rhône Valley wineries and trading
companies, complete economic information
is available on the website**

www.vins-rhone.com, espace Adhérents

