

OENOBIO 



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**Organic wine market in
France and export**



**VIGNERONS BIO
NOUVELLE AQUITAINE**

Vignerons Bio Nouvelle-Aquitaine : our missions



VIGNERONS BIO
NOUVELLE-AQUITAINE

Regional union representative of the organic wine sector created in 1995
Counts today *more than 200 organic winemakers members*
Support from *harvest* to *commercialisation*



DEFENSE & REPRESENTATION

Defends *interests of organic winemakers* amongst regional, national and European bodies related to viticulture and organic agriculture



PROMOTION

Promotes and *develops the collective image and notoriety* of organic wines and spirits to professionals and individuals



RESEARCH & DEVELOPMENT

Initiates and collaborates with *research programs* to improve the quality of organic wines



OENOLOGY

Contributes to the *economic and technical development* of organic wine production, by accompanying organic winegrowers individually and collectively



ECONOMY

Organic wine production

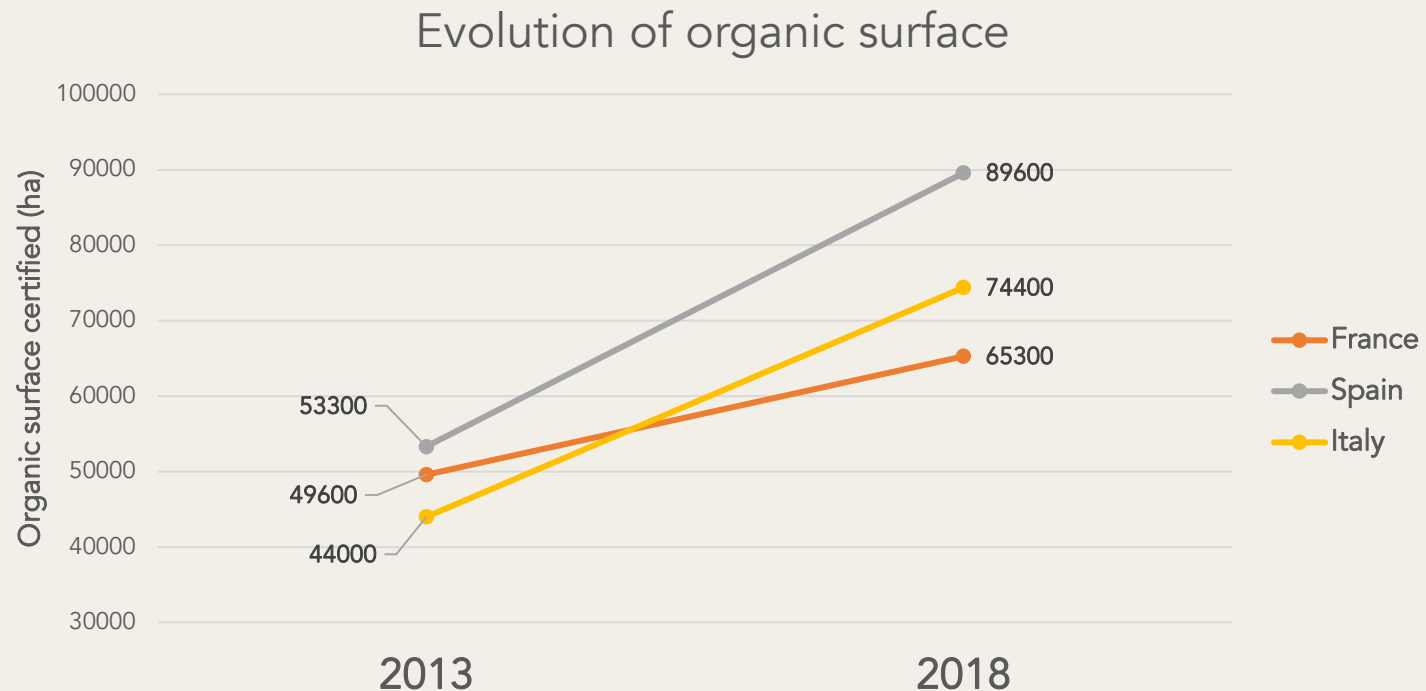
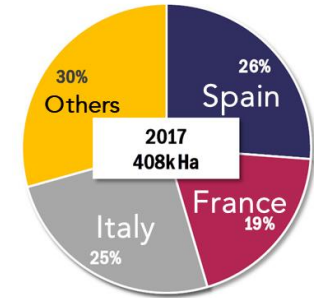
Organic wine production in the world



6% of world vineyard was organic in 2018

87% of organic wine was produced in Europe

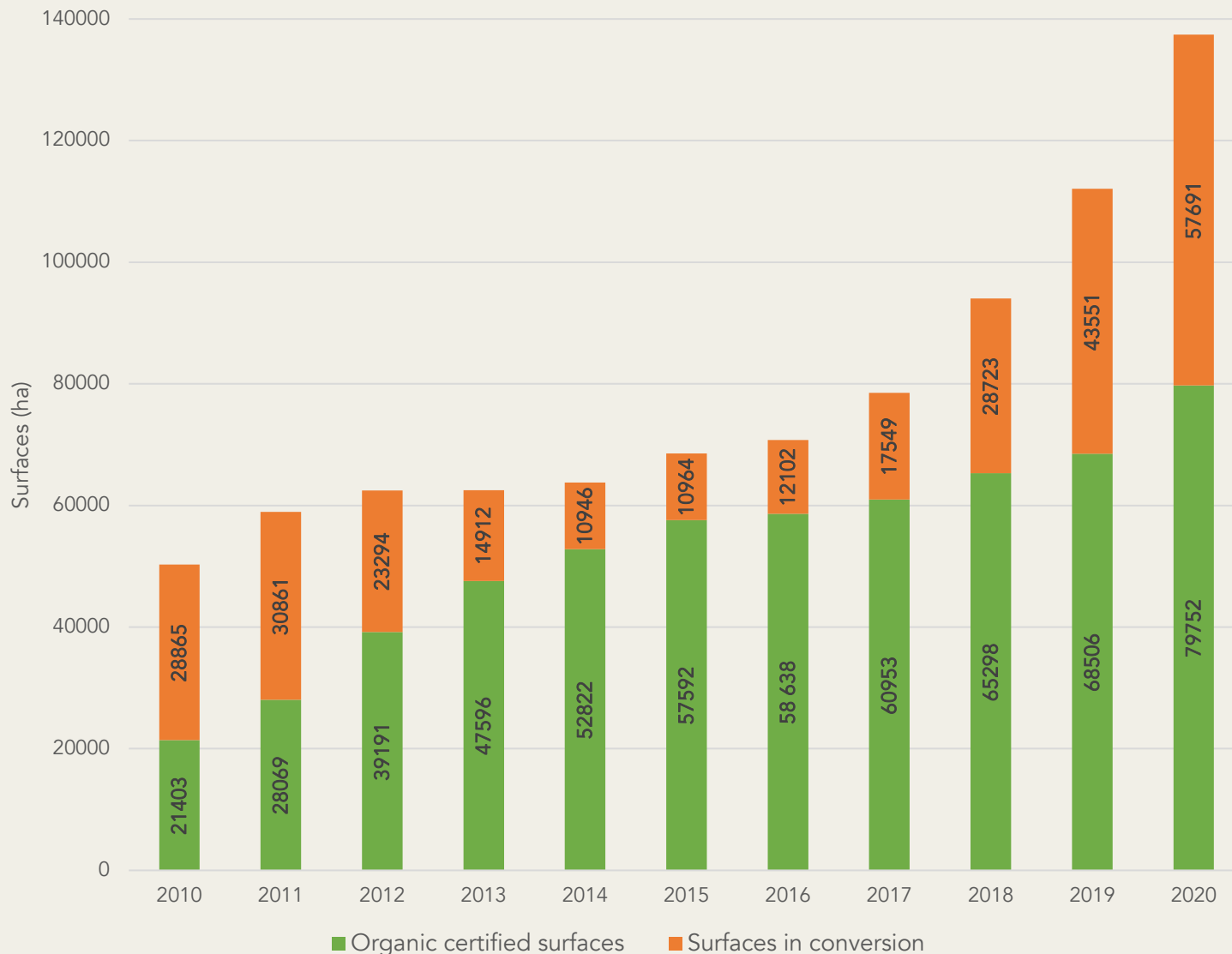
10,6 millions hL of organic wine in 2018



Organic wine production in France



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137 442

Hectares with
42% in
conversion

9784

organic wine
farms

17%

of french
vineyard

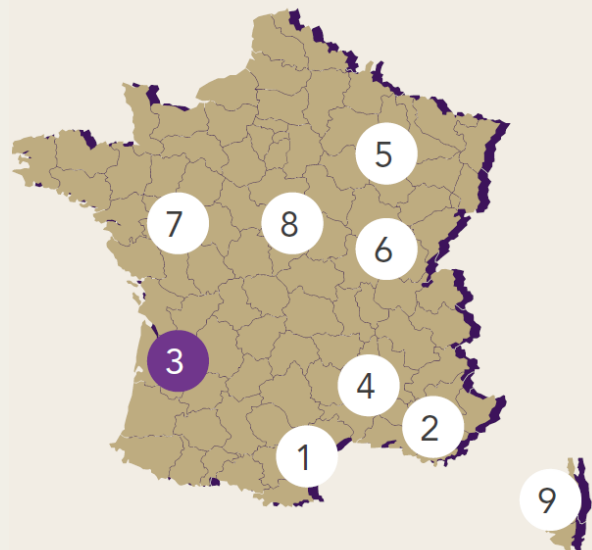
Focus on french regions



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3 wine regions produce 75% of french organic wine :

Occitanie (42 424 ha), PACA (23 011 ha) and Nouvelle-Aquitaine (19 696 ha)



		En Bio et en conversion	Vignoble en Bio*
1	Occitanie	42 424 ha	13%
2	PACA	23 012 ha	23%
3	Nouvelle-Aquitaine	19 696 ha	8,5 %
4	Auvergne Rhône Alpes	7 570 ha	12%
5	Grand Est	5 017 ha	8%
6	Bourgogne Franche Comté	4 538 ha	11%
7	Pays de La Loire	4 335 ha	12%
8	Centre Val de Loire	3 674 ha	15%
9	Corse	1 698 ha	22%

Export competition in 2018



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Share of organic
volumes sold on the
national market

12%



9%



58%



Share of organic
volume exported

88%

91%

42%

Organic wine and consumption

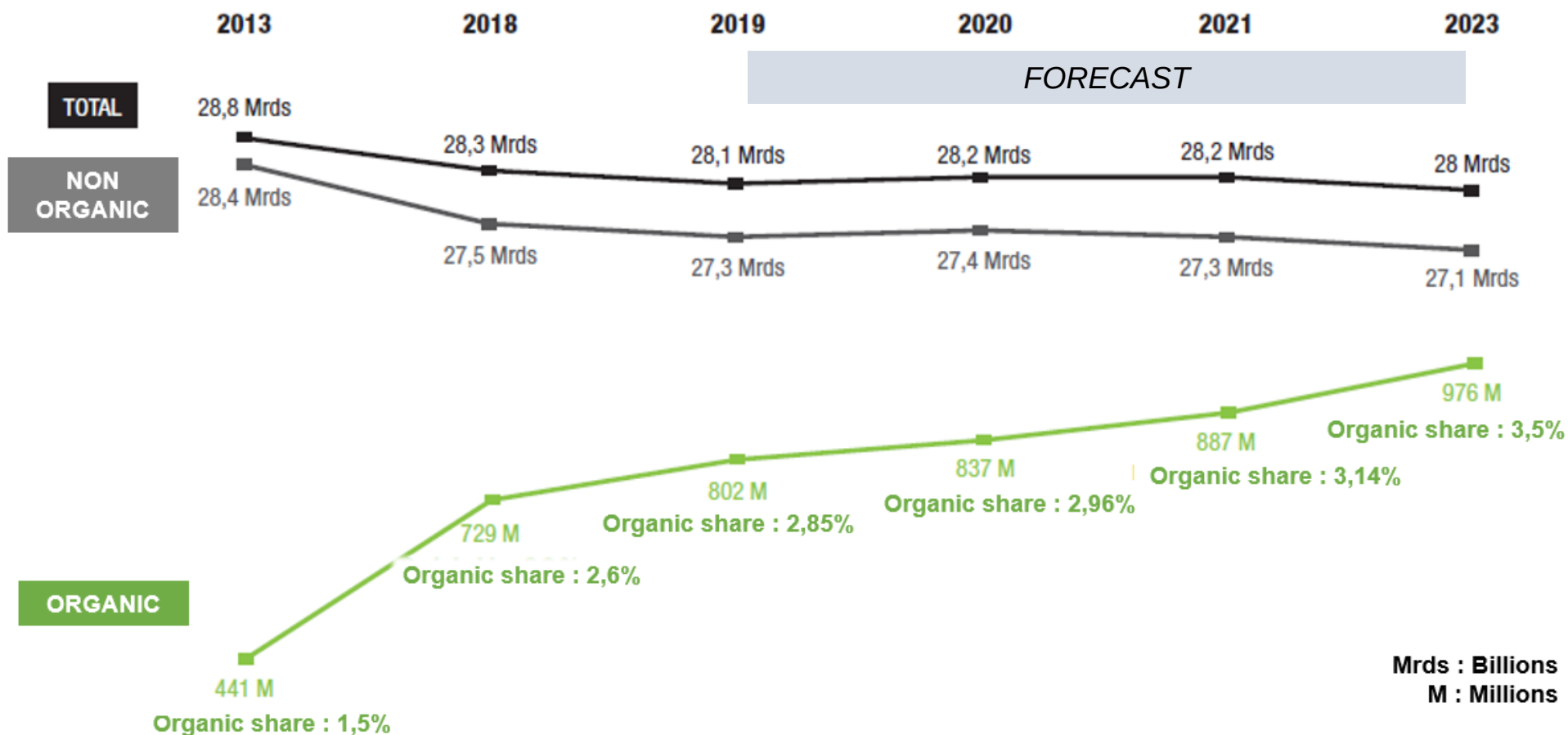
Growing demand around the world



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Evolution of global consumption of organic and non-organic wine in the world

(in number of bottles)

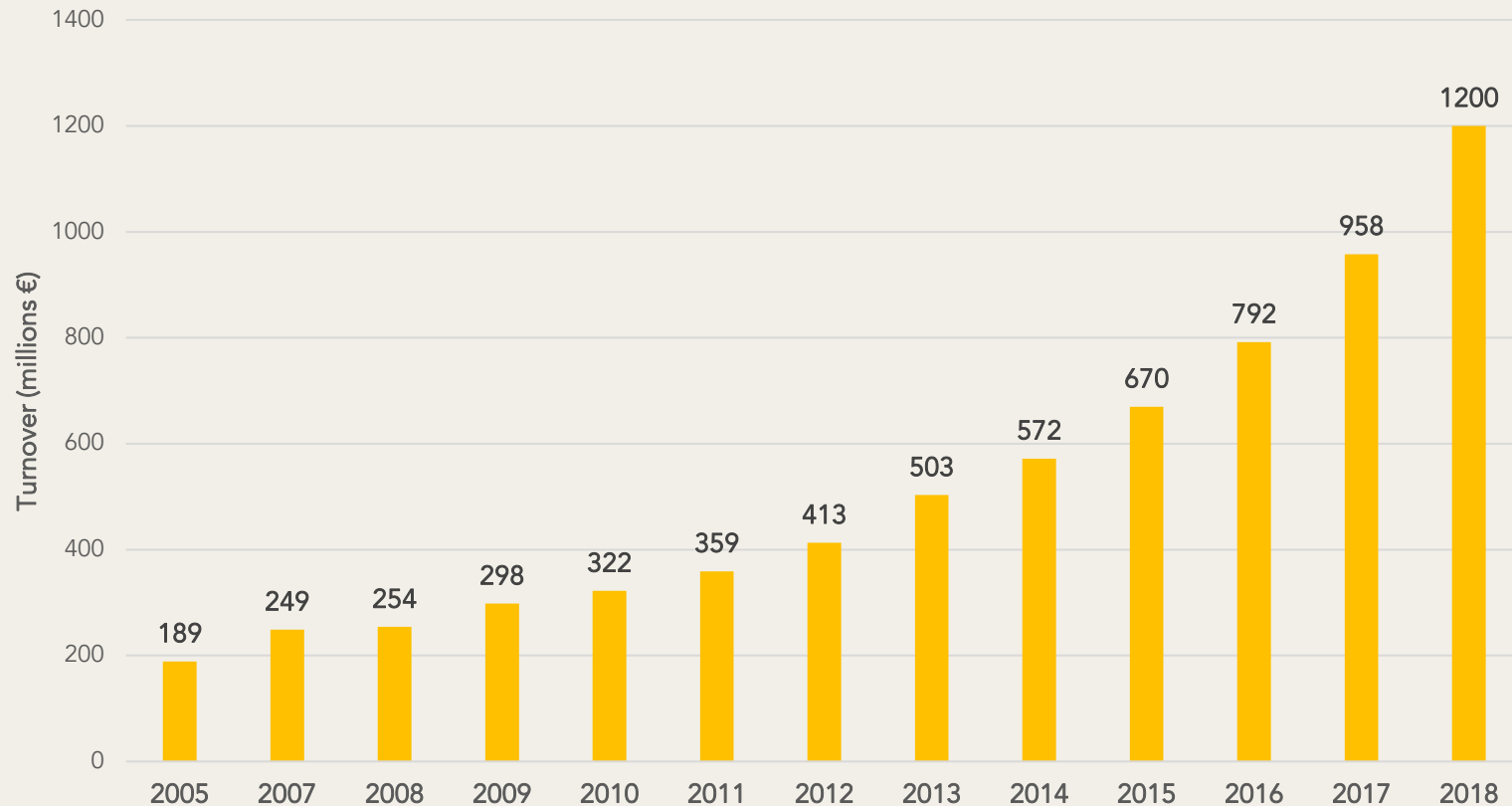


Same phenomenon in France



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Evolution of the turnover of organic wines sold in France



1,2
Billions €
in 2018

x 4
in 10 ans

The consumer of organic wine is above all... a wine consumer!



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What are your purchasing criteria for ...

- A bottle of wine?
- A bottle of organic wine?

	Organic wine	Wine
Origin of production (region, country)	57%	63%
AOP notoriety	37%	36%
Advice (salespeople, entourage)	25%	25%
Indication of grape varieties on the label	24%	21%
Medals, awards	19%	28%
Vintage	16%	24%
Brand	12%	14%
Promotions	11%	15%
Respect for the environment, environmental label	43%	7%
Price	30%	50%

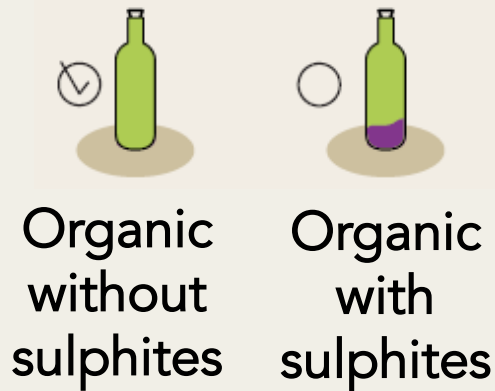
The consumer wants organic wine... but not only?



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Democratization of environmental and health "performances" in complement to those of organic farming: vinification without added sulphites, resistant grape varieties, biodynamics, vegan ...

Will the consumer be satisfied with an "only" organic wine?



Consumers are prepared to pay more for a bottle of organic wine without sulphites than with sulphites

On the other hand, organic remains a more important criteria!
In the study, conventional wine without added sulphites remains less valued than organic wine with sulphites.

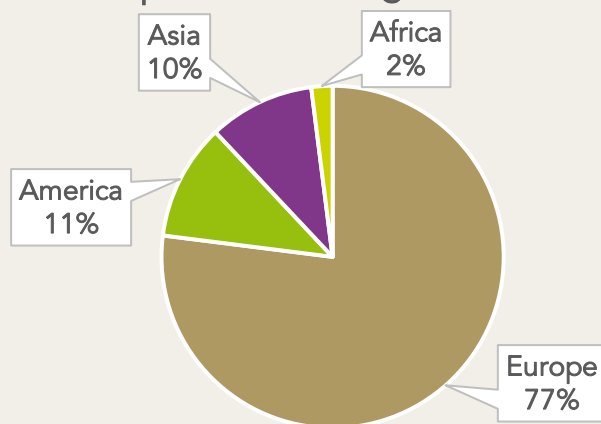
Organic wine market

Target export markets



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World importation of organic wine repartition



- Export between EU countries facilitated by the same organic regulations
- France consumes 99.5% of French organic wines

World rank	First importers of organic wine	% of global organic wine imports*
1 st	Germany	24%
2 nd	France	16%
3 rd	United Kingdom	10%
4 th	USA	8%
5 th	Sweden	7%
6 th	Japan	6%

Data 2017

IWSR SudvinBio 2018 ; Agence Bio l'Agriculture Bio dans le monde, 2019

*in volume

Focus on regulation outside EU



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EU organic regulations are recognized as equivalent to NOP outside of winemaking. To be recognized as "NOP equivalent", a wine produced in the EU must be certified organic and processed in accordance with NOP rules (compliance with rules on sulphites, restricted list of inputs and specific labeling rules).



There is no equivalence between the European regulation and the Chinese regulation on organic products. An organic winegrower wishing to export to China must make a request to a certification body accredited by the Chinese authorities, the CNCA (Certification and Accreditation Administration of China).

The Chinese organic logo is mandatory. Only the Chinese logo must be affixed on the bottle, the European organic logo is prohibited.



Wine cannot claim this certification because it has not been included in Japanese regulations. Thus, it will not be possible for a winemaker to have his wine certified as "organic JAS". On the other hand, it is possible to export it by keeping the AB logos and the Euroleaf, a logo recognized by the Japanese consumer.

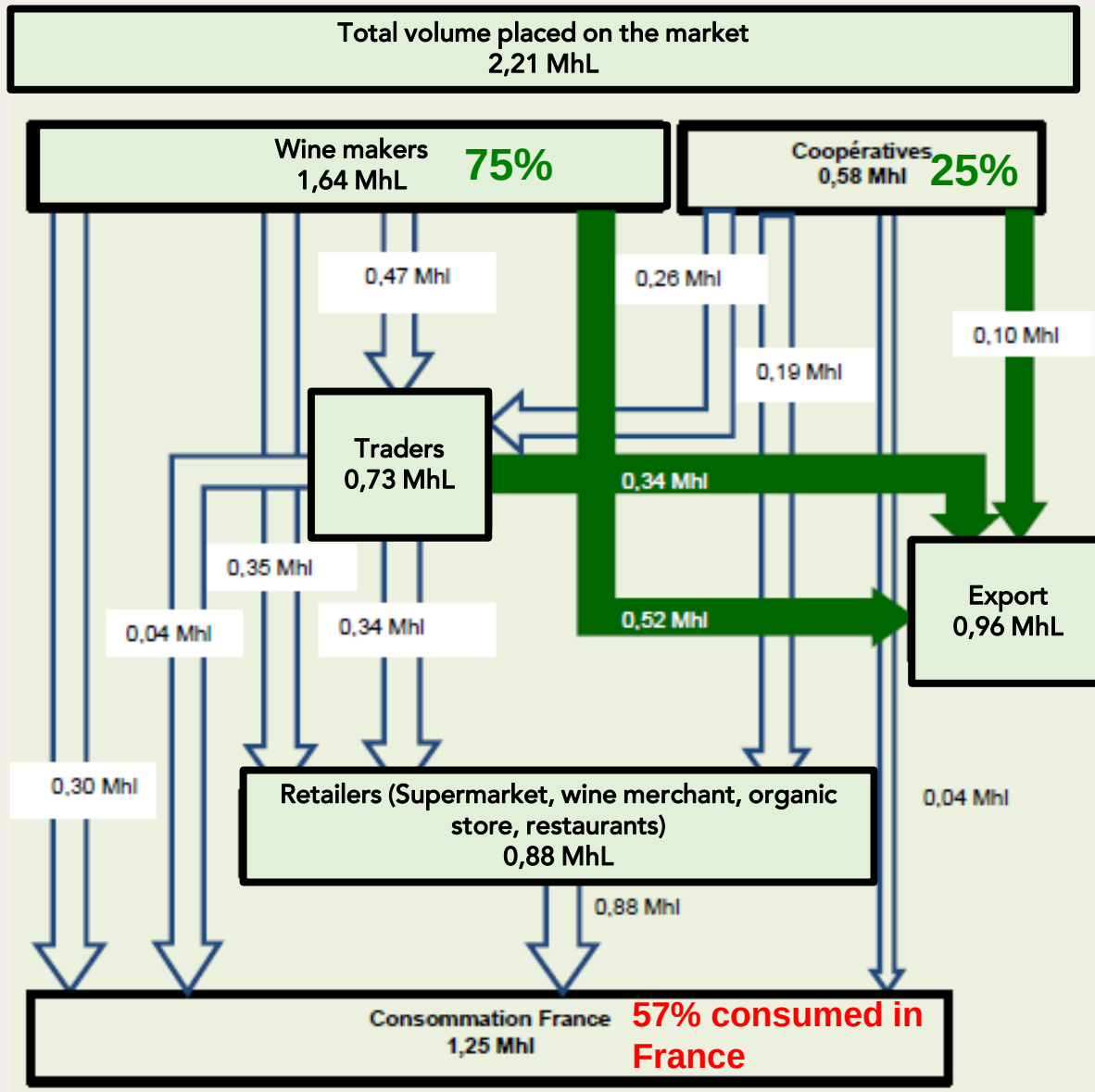


In France : who sells to who ?

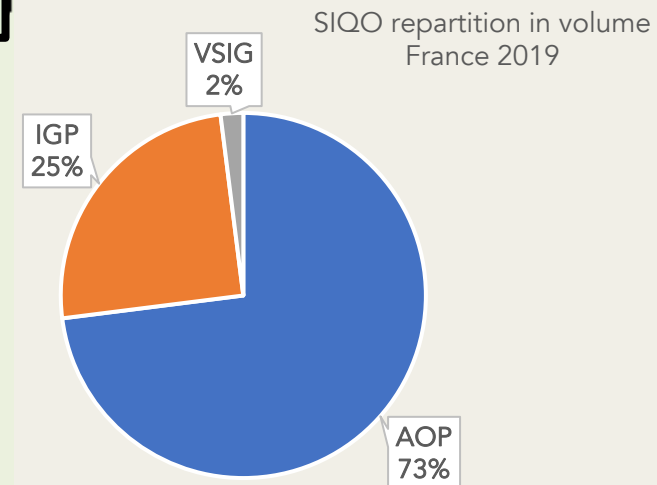


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Diagram of the
marketing of organic
wines in France in 2019



43% exported



Commercial autonomy sought by winegrowers



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Distribution of sales channels by marketer (in volume) - France 2019



Thinking about price

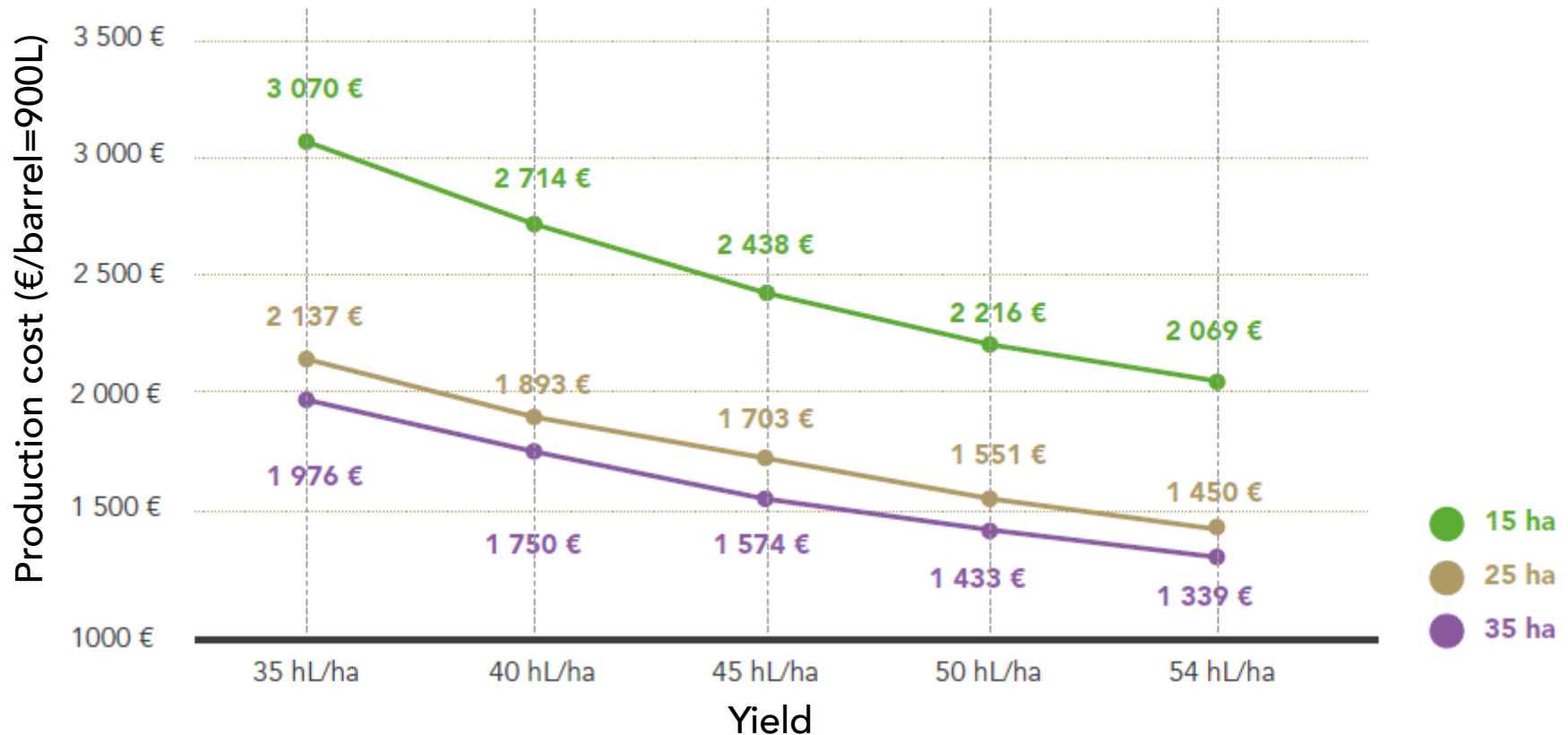
Producing organic is more expensive



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Production costs for a farm of 15 ha at 54 hL / ha	Non organic	Organic
Labor hours (hours)	149 h	190 h
Labor (€ / ha)	2 493 €	3 162 €
Supplies (€ / ha)	1 307 €	1 684 €
Services (€ / ha)	495 €	565 €
Mechanization (€ / ha)	1 058 €	1 763 €
Bare land farming for wine-growing 1.5 hL / ha (€ / ha)	209 €	209 €
Depreciation of the vineyard (25 years) (€ / ha)	1 449 €	1 421 €
Restructuring of the vineyard (grant) (€ / ha)	-400 €	-400 €
Climate insurance (grant deducted) (€ / ha)	110 €	110 €
General vineyard costs (€ / ha)	782 €	782 €
TOTAL VINEYARD COST (€ / ha) (A)	7 503 €	9 296 €
Non organic versus organic differential	-	+ 24%
TOTAL VINIFICATION COST (€ / ha) (B)	3 116 €	3 116 €
TOTAL WINE COST IN BULK (€ / ha) (A + B)	10 619 €	12 412 €
TOTAL WINE COST IN BULK (€ / barrel)	1 770 €	2 069 €
Non organic versus organic differential	-	+ 17%
Total cost of wine for 0.75L (€ / 0.75L)	1,47 €	1,72€
Bottling and packaging costs (€ / bottle)	1,25 €	1,25 €
BOTTLE COST BEFORE MARKETING (€ / bottle)	2,72 €	2,97 €
Non organic versus organic differential	-	+ 9%

Evolution of production cost as a function of yield

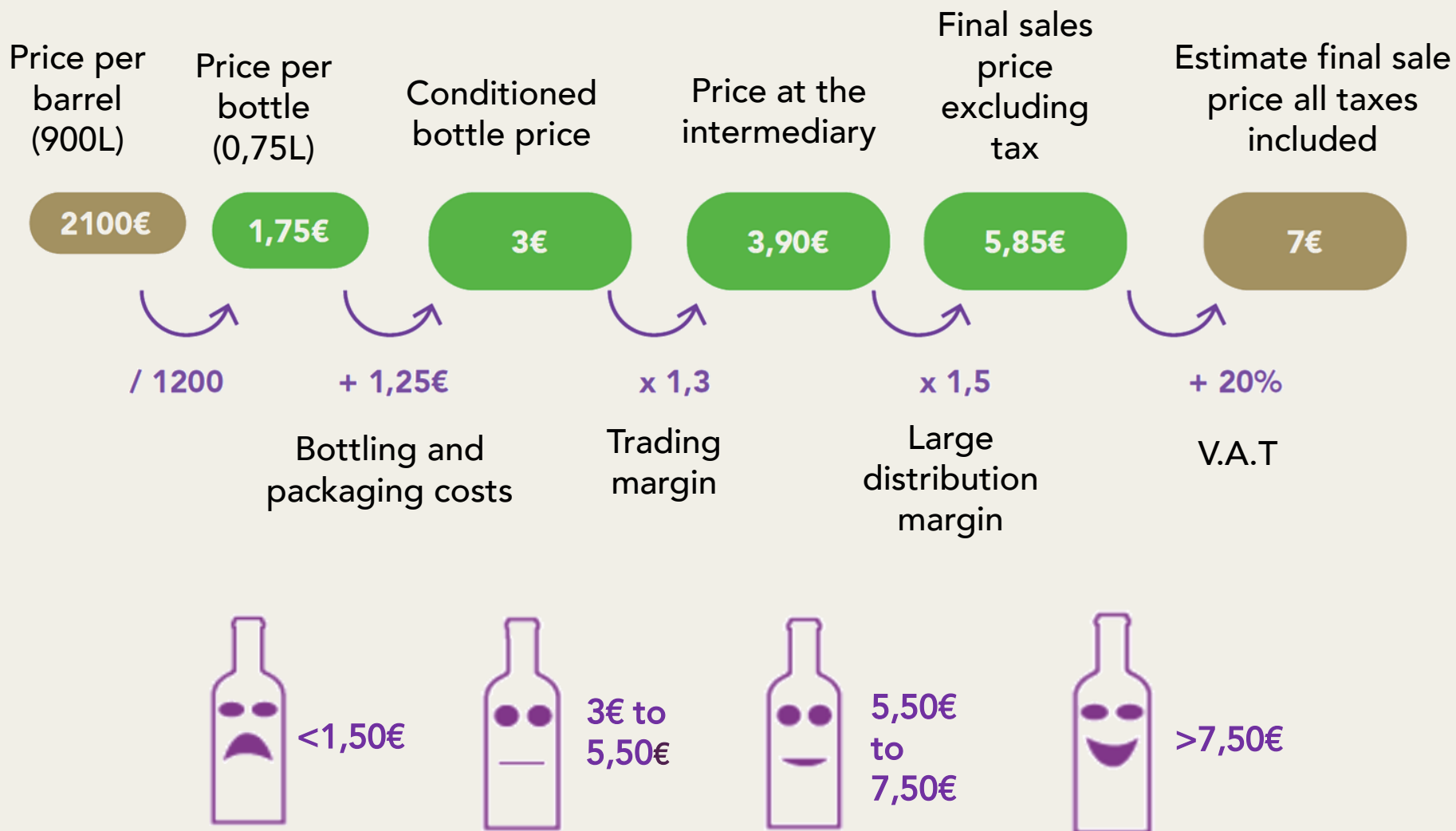


Production costs must be calculated over a period of several years, in order to take into account weather variations.

Example of price construction



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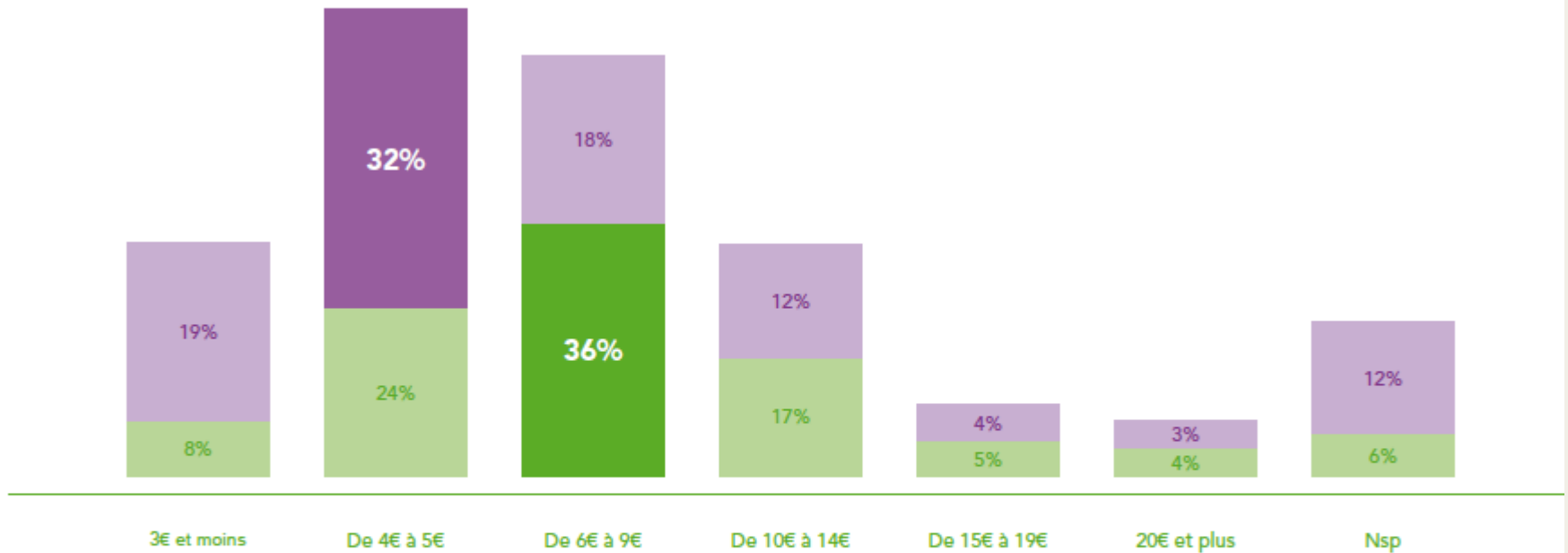


What about the consumer's willingness to pay?



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How much do you spend on average for the purchase of a bottle of ...



■ Organic wine

For everyday consumption (average 8,70€)

■ Non Organic wine

For everyday consumption (average 6,90€)

Source : Etude IPSOS / CGI pour Sud de France / SudVinBio ; Octobre 2013

THANK YOU FOR YOUR ATTENTION

Anne HUBERT

Chargée de mission

economie@vigneronsbionouvelleaquitaine.fr

For more informations, contact us !

contact@vigneronsbionouvelleaquitaine.fr

www.vigneronsbionouvelleaquitaine.fr

38 route de Goujon - 33570 Montagne - France

+335 57 51 39 60



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