

# KEY FIGU RES

2022



**RHÔNE VALLEY**  
VINEYARDS



# CON TENTS



## INFORMATION METHODOLOGY & SYNTHESIS



## RHONE VALLEY VINEYARDS AOP WINE PRODUCTION IN 2022

World Wine Production | p.9

Rhône Valley Vineyards in France | p.9

Rhône Valley Vineyards within  
the regional production area | p.10

Rhône Valley Vineyards  
main grape varieties | p.12

Rhône Valley Vineyards production  
in 2022 and its evolution | p.13



## STOCKS, CELLAR DESPATCHES AND BULK CONTRACTUALIZATION

Rhône Valley Vineyards  
AOP wines stocks | p.17

Cellar despatches  
and economic balance | p.18

Bulk contractualization | p.21




## SALES AND EXPORTS

Distribution channels | p.24

The French market | p.26

Exports in 2022 | p.30



# 01

## 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 2022 harvest. Bulk contracts, stocks and cellar despatches concern the 2021-2022 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 2022 (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.

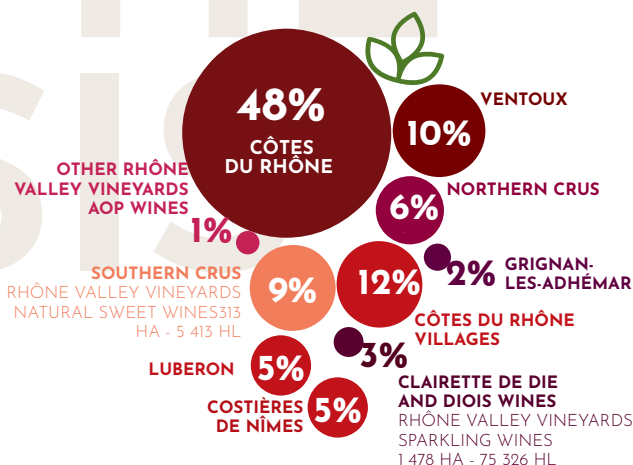
### SUSTAINABLE DEVELOPMENT

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.

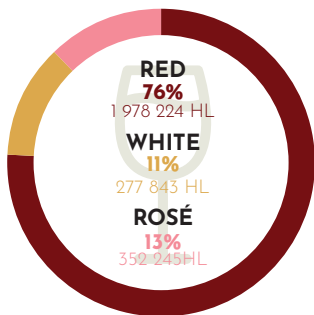
# RHÔNE VALLEY VINEYARDS PRODUCTION IN 2022

-Sources: DR, DREV, producers unions, Inter Rhône 2022 (except Châteauneuf du Pape)

## 2022 HARVEST BREAKDOWN BY AOP



## 2022 HARVEST BREAKDOWN BY COLOUR



## HARVEST YEAR ON YEAR EVOLUTION

2017	2018	2019	2020	2021	2022
2 478 880 HL	2 766 465 HL	2 796 833 HL	2 708 642 HL	2 553 289 HL	2 608 312 HL

5 YEARS  
AVERAGE  
2 686 708 HL  
66 793 HA

7235 RHÔNE  
VALLEY VINEYARDS  
AOP FARMS  
IN 2022

Professional and non-professional  
Holdings specialised or not in winegrowing



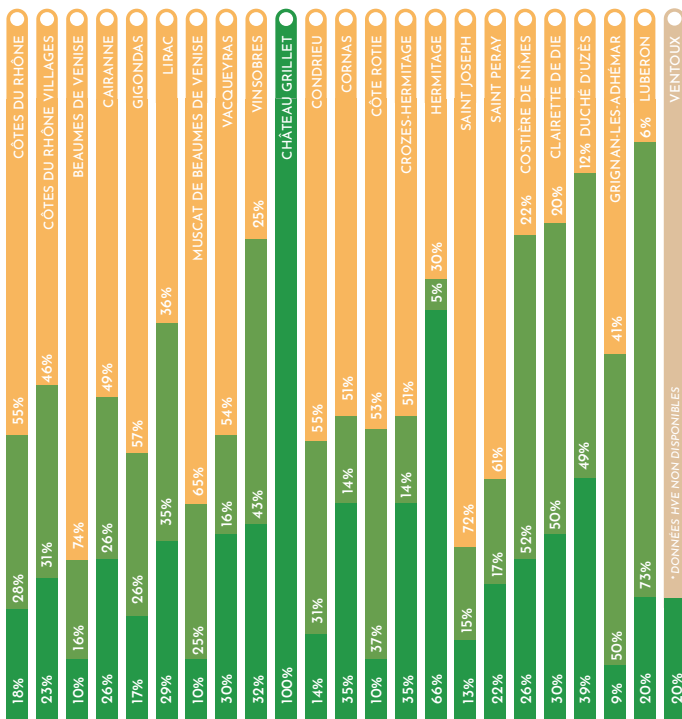
# THE ORGANIC HARVEST IN 2022

## BREAKDOWN OF 2022 AREAS BY CERTIFICATION/LABEL OR CONVENTIONAL WINE-GROWING AND BY APPELLATION

Valley appellations for which we know the organic and HVE3 surface areas, here is the breakdown, in hectares, of certified organic, HVE, and conventional surface areas for the 2022 harvest.

Sources: Producer unions, ODG, Inter Rhône.

- ONVENTIONAL SURFACE AREA (AS A PERCENTAGE)
- HVE3 LABEL SURFACE AREA (AS A PERCENTAGE)
- ORGANIC SURFACE AREA (AS A PERCENTAGE)



\* DONNÉES HVE NON DISPONIBLES

### TOTAL RHONE VALLEY VINEYARDS



IN THE RHÔNE VALLEY VINEYARDS, HVE3 REPRESENT

**24% IN VOLUME**  
**28% IN AREA**

OF THE 2022 HARVEST

IN THE RHÔNE VALLEY VINEYARDS, ORGANIC WINES REPRESENT

**18% IN VOLUME**  
**20% IN AREA**

OF THE 2022 HARVEST

# THE RHÔNE VALLEY VINEYARDS ENTITIES SELLING IN 2021/2022

Sources: DRM, SVI2, Interprofessional contracts, Inter Rhône 2022 except Châteauneuf du Pape  
In volume

## BREAKDOWN OF RHÔNE VALLEY AOP WINE CELLAR DESPATCHES BY PRODUCTION ENTITY



COOPERATIVE WINERIES  
**61%**

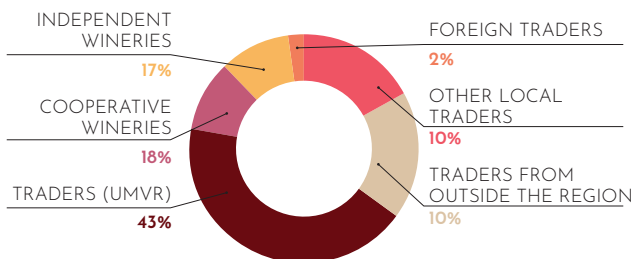


INDEPENDENT WINERIES  
**34%**



VINIFICATION COMPANIES  
**5%**

## BREAKDOWN OF RHÔNE VALLEY AOP WINE VOLUME BY SALES ENTITY



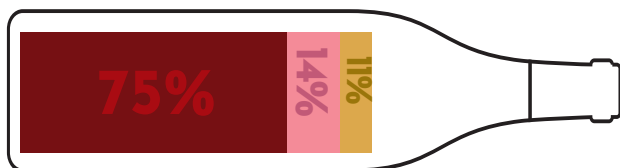
## ENTITIES SELLING RHÔNE VALLEY AOP WINES (BULK OR PACKAGED)

	INDEPENDENT WINERIES	COOPERATIVE WINERIES	TRADING COMPANIES PRODUCERS UNIONS VINIFICATION COMPANIES
Rhône Valley Vineyards	1592	90	434
Côtes du Rhône	884	52	263
Côtes du Rhône Villages	460	40	119
CDR + CDR Villages	914	52	283
Côtes du Rhône Crus	647	24	208
Costières de Nîmes Clairette de Bellegarde	84	11	64
Côtes du Vivarais	18	6	5
Duché d'Uzès	38	8	7
Grignan-les-Adhémar	31	8	26
Luberon	67	11	41
Ventoux	159	14	75
Clairette de Die and Diois Wines	26	2	8

# RHÔNE VALLEY AOP WINE CELLAR DESPATCHES IN 2021/2022

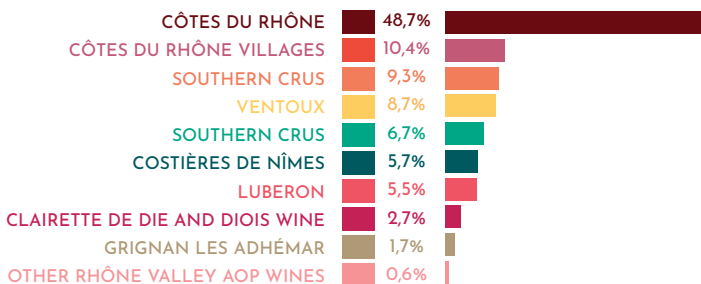
Sources: DRM, SVI2, interprofessional contracts, Inter Rhône 2022  
except Châteauneuf du Pape.

## BREAKDOWN OF CELLAR DESPATCHES BY COLOUR



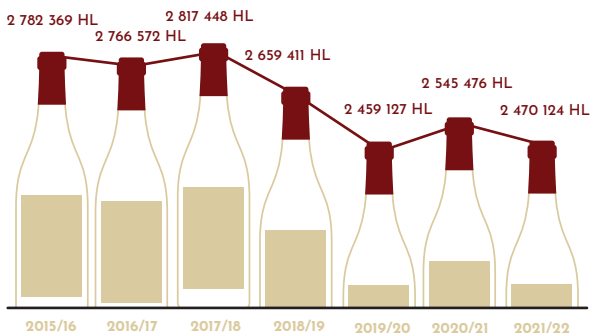
**RED:** 1 863 271 hl | **ROSÉ :** 340 780 hl | **WHITE :** 266 073 hl

## 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



# 02

RHONE VALLEY  
VINEYARDS AOP WINES  
PRODUCTION  
IN 2022





# WORLD WINE PRODUCTION IN 2022

Source : OIV 2022

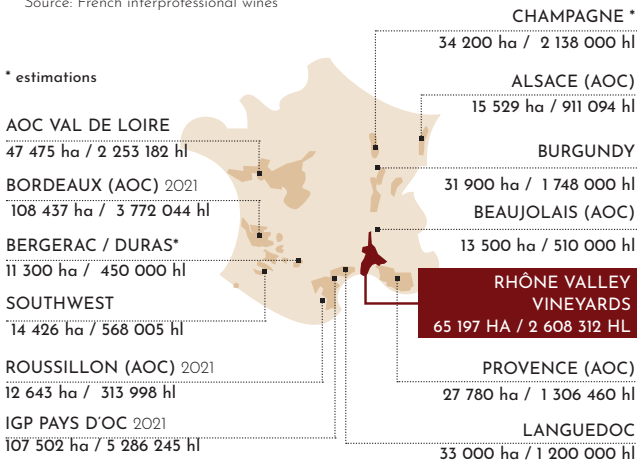


	ITALY	50,3 MHLS	+0,1%	
	FRANCE	44,2 MHLS	+17%	
	SPAIN	33 MHLS	-6%	
	USA	23,1 MHLS	-4%	
	AUSTRALIA	12,1 MHLS	-18%	
	CHILE	12,4 MHLS	-7%	
	ARGENTINA	11,4 MHLS	-9%	

# RHÔNE VALLEY VINEYARDS IN FRANCE IN 2022

Source: French interprofessional wines

\* estimations



FRANCE  
THE WORLD'S  
2ND BIGGEST  
PRODUCER

RHÔNE VALLEY  
VINEYARDS  
SECOND  
LARGEST  
AOP WINE  
REGION

WORLD  
PRODUCTION  
ESTIMATED  
AT 259,9 MHLS  
IN 2022

i.e. **-0,4%**

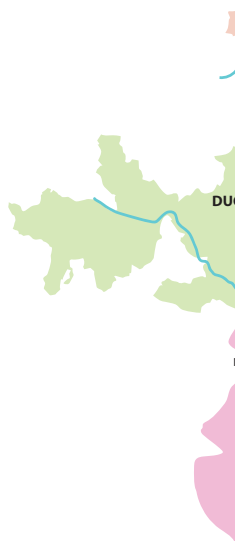


## WINE PRODUCTION IN THE FRENCH DEPARTMENTS OF THE RHÔNE VALLEY

Source: French Customs Authorities,  
Production 2022

	AOP	IGP	WWGI	TOTAL AVAILABLE - HL
<b>Rhône / Loire / Isère</b>	95%	2%	3%	<b>689 173</b>
<b>Ardèche</b>	21%	76%	3%	<b>478 846</b>
<b>Drôme</b>	78%	19%	3%	<b>724 010</b>
<b>Gard</b>	24%	65%	7%	<b>2 787 879</b>
<b>Vaucluse</b>	68%	29%	3%	<b>1 945 808</b>

-  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







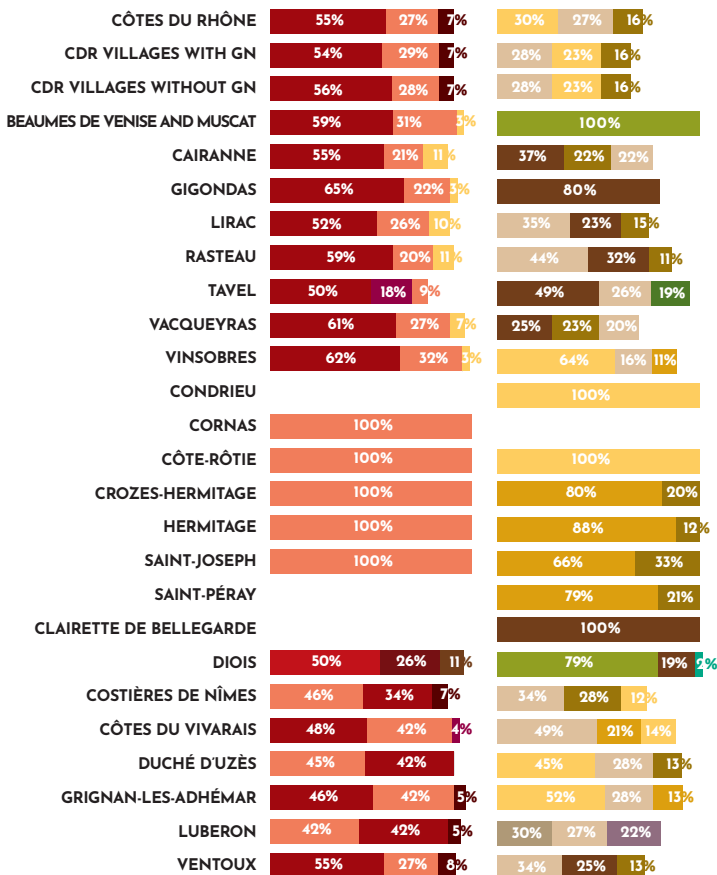
# RHÔNE VALLEY VINEYARDS

## 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

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



### MAIN GRAPE VARIETIES AREA (IN HA) IN 2022

<b>GRENACHE B</b>	35 881 HA
<b>SYRAH B</b>	23 262 HA
<b>CARIGNAN B</b>	4 191 HA
<b>MOURVEDRE B</b>	2 851 HA
<b>CINSAULT B</b>	2 222 HA



<b>GRENACHE W</b>	2 008 HA
<b>MUSCAT W</b>	1 593 HA
<b>À PETITS GRAINS</b>	
<b>VIOGNIER W</b>	1 485 HA
<b>CLAIRETTE W</b>	1 332 HA
<b>ROUSSANNE W</b>	1 112 HA





# RHÔNE VALLEY VINEYARDS PRODUCTION IN 2022

Sources: DR, DREV, producers unions - Inter Rhône 2022 Except Châteauneuf du Pape

en ha, en hl et en hl/ha	Surface 2022	Mill 2022	Rende- ment	REDS		ROSÉS		WHITES	
<b>TOTAL RHÔNE VALLEY VINEYARDS</b>	<b>65 197</b>	<b>2 608 312</b>	<b>40</b>	<b>1 978 224</b>	<b>76%</b>	<b>352 245</b>	<b>13%</b>	<b>277 843</b>	<b>11%</b>
<b>CDR + CDR Villages</b>	<b>38 286</b>	<b>1 558 029</b>	<b>41</b>	<b>1 369 199</b>	<b>88%</b>	<b>96 272</b>	<b>6%</b>	<b>92 558</b>	<b>6%</b>
<b>CDR + CDR Vill + Crus</b>	<b>50 348</b>	<b>1 950 960</b>	<b>39</b>	<b>1 696 158</b>	<b>87%</b>	<b>124 155</b>	<b>6%</b>	<b>130 647</b>	<b>7%</b>
<b>Côtes du Rhône</b>	<b>29 647</b>	<b>1 251 477</b>	<b>42</b>	<b>1 075 630</b>	<b>86%</b>	<b>94 630</b>	<b>7,6%</b>	<b>81 218</b>	<b>6%</b>
<b>Côtes du Rhône Villages</b>	<b>8 639</b>	<b>306 552</b>	<b>35</b>	<b>293 570</b>	<b>95,8%</b>	<b>1 642</b>	<b>0,5%</b>	<b>11 340</b>	<b>3,7%</b>
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	2 655	97 630	37	95 575	97,9%	140	0,1%	1 915	2%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	5 984	208 922	35	197 995	94,8%	1 502	0,7%	9 425	4,5%
<b>Southern Crus</b>	<b>7 789</b>	<b>235 501</b>	<b>30</b>	<b>196 729</b>	<b>84%</b>	<b>27 883</b>	<b>12%</b>	<b>10 889</b>	<b>5%</b>
<b>Beaumes-de-Venise</b>	705	22 141	31	22 141	100%				
<b>Cairanne</b>	877	29 283	33	27 648	94%			1 635	6%
<b>Gigondas</b>	1 191	36 286	30	36 056	99%	230	1%		
<b>Lirac</b>	854	19 945	23	16 883	85%	555	3%	2 507	13%
<b>Rasteau still wine</b>	942	32 742	35	32 742	100%				
<b>Tavel</b>	887	26 323	30			26 323	100%		
<b>Vacqueyras</b>	1 474	45 926	31	43 237	94%	232	1%	2 457	5%
<b>Vinsobres</b>	547	17 443	32	17 443	100%				
<b>Muscat de BdV</b>	295	4 943	17	112	2%	542	11%	4 289	87%
<b>Rasteau VDN</b>	17	469	27	469	100%				
<b>Northern Crus</b>	<b>4 273</b>	<b>157 429</b>	<b>37</b>	<b>130 229</b>	<b>83%</b>			<b>27 200</b>	<b>17%</b>
<b>Château-Grillet</b>	4	75	20					75	100%
<b>Condrieu</b>	215	7 961	37					7 961	100%
<b>Cornas</b>	159	5 040	32	5 040	100%				
<b>Côte-Rôtie</b>	333	12 326	37	12 326	100%				
<b>Crozes-Hermitage</b>	1 964	73 388	37	65 805	90%			7 584	10%
<b>Hermitage</b>	136	4 155	31	2 863	69%			1 292	31%
<b>Saint-Joseph</b>	1 352	50 896	38	44 195	87%			6 701	13%
<b>Saint-Péray</b>	111	3 586	32					3 586	100%
<b>Other Rhône Valley AOP Wines</b>	<b>14 849</b>	<b>657 352</b>	<b>44</b>	<b>282 066</b>	<b>43%</b>	<b>228 090</b>	<b>35%</b>	<b>147 197</b>	<b>22%</b>
<b>Clairette de Bellegarde</b>	6	223	35					223	100%
<b>Clairette de Die</b>	1 431	73 219	51					73 219	100%
<b>Châtillon-en-Diois</b>	39	1 783	46	729	41%	165	9%	890	50%
<b>Coteaux de Die</b>	2,2	101	46					101	100%
<b>Crémant de Die</b>	33	1 765	53					1 765	100%
<b>Costières de Nîmes</b>	2 859	136 393	48	60 156	44%	64 304	47%	11 932	9%
<b>Côtes du Vivarais</b>	180	5 668	32	3 054	54%	2 153	38%	461	8%
<b>Duché d'Uzès</b>	321	10 694	33	5 667	53%	1 797	17%	3 230	30%
<b>Grignan- les-Adhémar</b>	1 211	43 360	36	31 139	72%	6 991	16%	5 230	12%
<b>Luberon</b>	3 130	136 904	44	36 342	27%	67 893	50%	32 669	24%
<b>Ventoux</b>	5 638	247 241	44	144 978	59%	84 787	34%	17 476	7%

<b>SPIRITS WITH GEOGRAPHICAL INDICATION</b> Mill 2021 (hl pure alcohol)	<b>100</b>
Eau-de-vie de Marc des Côtes du Rhône	93
Eau-de-vie de vin des Côtes du Rhône	7



# PRODUCTION BY APPELLATION : YEAR ON YEAR EVOLUTION

Sources: DR, DREV, ODG, producers unions - Inter Rhône 2022 Except Châteauneuf du Pape

in hl	Vintage					
	2017 Vintage	2018 Vintage	2019 Vintage	2020 Vintage	2021 Vintage	2022 Vintage
<b>Total Rhône Valley Vineyards</b>	<b>2 478 880</b>	<b>2 766 465</b>	<b>2 796 833</b>	<b>2 708 642</b>	<b>2 553 289</b>	<b>2 608 312</b>
<b>CDR + CDR Villages</b>	<b>1 483 556</b>	<b>1 596 506</b>	<b>1 669 322</b>	<b>1 601 630</b>	<b>1 546 234</b>	<b>1 558 029</b>
<b>CDR + CDR Vill + Crus</b>	<b>1 841 017</b>	<b>1 989 617</b>	<b>2 052 255</b>	<b>2 000 753</b>	<b>1 932 531</b>	<b>1 950 960</b>
<b>Côtes du Rhône</b>	<b>1 178 297</b>	<b>1 280 240</b>	<b>1 332 125</b>	<b>1 310 738</b>	<b>1 271 382</b>	<b>1 251 477</b>
<b>Côtes du Rhône Villages</b>	<b>305 259</b>	<b>316 266</b>	<b>337 197</b>	<b>290 892</b>	<b>274 853</b>	<b>306 552</b>
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	107 273	108 427	112 412	94 916	85 184	97 630
CDR VILLAGES WITH A GEOGRAPHICAL NAME	197 986	207 839	224 785	195 976	189 669	208 922
<b>SOUTHERN CRUS</b>	<b>209 696</b>	<b>231 731</b>	<b>241 192</b>	<b>239 488</b>	<b>225 200</b>	<b>235 501</b>
<b>Beaumes-de-Venise</b>	19 842	21 425	21 426	22 735	20 304	22 141
<b>Cairanne</b>	23 813	23 020	29 075	29 153	26 674	29 283
<b>Gigondas</b>	31 157	34 319	36 047	36 356	32 986	36 286
<b>Lirac</b>	17 084	23 864	21 004	20 022	23 330	19 945
<b>Rasteau Still wine</b>	27 498	28 746	32 299	32 311	31 747	32 742
<b>Tavel</b>	26 527	36 779	29 868	30 337	35 522	26 323
<b>Vacqueyras</b>	38 817	40 747	46 045	46 801	32 560	45 926
<b>Vinsobres</b>	19 516	16 361	18 943	16 219	17 223	17 443
<b>Muscat de Beaumes-de-Venise</b>	5 234	6 308	6 094	5 412	4 746	4 943
<b>Rasteau VDN</b>	208	162	391	142	108	469
<b>NORTHERN CRUS</b>	<b>147 765</b>	<b>161 381</b>	<b>141 741</b>	<b>159 636</b>	<b>161 097</b>	<b>157 429</b>
<b>Château-Grillet</b>	39	61	62	89	31	75
<b>Condrieu</b>	6 089	8 388	7 442	7 686	4 647	7 961
<b>Cornas</b>	4 369	4 918	5 128	5 243	5 530	5 040
<b>Côte-Rôtie</b>	11 823	12 763	12 121	11 467	9 544	12 326
<b>Crozes-Hermitage</b>	71 581	75 918	57 936	76 291	80 359	73 388
<b>Hermitage</b>	4 594	5 156	4 885	4 677	4 528	4 155
<b>Saint-Joseph</b>	46 467	51 111	50 203	50 890	52 959	50 896
<b>Saint-Péray</b>	2 803	3 065	3 964	3 294	3 498	3 586
<b>OTHER RHONE VALLEY AOP WINES</b>	<b>637 863</b>	<b>776 847</b>	<b>744 577</b>	<b>707 888</b>	<b>620 758</b>	<b>657 352</b>
<b>Clairette de Bellegarde</b>	287	269	263	180	262	223
<b>Clairette de Die **</b>	45 735	94 254	84 576	70 131	67 628	73 219
<b>Châtillon-en-Diois**</b>	534	2 035	1 898	1 662	1 444	1 783
<b>Coteaux de Die**</b>	52	55	73	56	51	101
<b>Crémant de Die**</b>	473	1 719	1 221	1 040	1 497	1 765
<b>Costières de Nîmes</b>	199 880	211 751	177 594	153 380	158 343	136 393
<b>Côtes du Vivarais</b>	9 023	10 872	8 819	6 920	6 221	5 668
<b>Duché d'Uzès</b>	10 623	10 490	10 642	9 584	10 000	10 694
<b>Grignan-les-Adhémar</b>	42 446	48 738	51 797	47 157	45 651	43 360
<b>Luberon</b>	136 278	151 391	154 454	160 641	127 881	136 904
<b>Ventoux</b>	192 532	245 273	253 240	257 137	201 780	247 241



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

Sources: DR, DREV, ODG, producers unions - Inter Rhône 2022 Except Châteauneuf du Pape

in ha	Vintage					
	2017 Vintage	2018 Vintage	2019 Vintage	2020 Vintage	2021 Vintage	2022 Vintage
<b>Total Rhône Valley Vineyards</b>	<b>68 103</b>	<b>68 132</b>	<b>67 600</b>	<b>66 583</b>	<b>66 451</b>	<b>65 197</b>
<b>CDR + CDR Villages</b>	<b>39 424</b>	<b>39 754</b>	<b>39 433</b>	<b>39 419</b>	<b>39 191</b>	<b>38 286</b>
<b>CDR + CDR Vill + Crus</b>	<b>51 123</b>	<b>51 467</b>	<b>51 289</b>	<b>51 289</b>	<b>51 078</b>	<b>50 348</b>
<b>Côtes du Rhône</b>	<b>30 212</b>	<b>30 749</b>	<b>30 281</b>	<b>31 134</b>	<b>30 784</b>	<b>29 647</b>
<b>Côtes du Rhône Villages</b>	<b>9 212</b>	<b>9 005</b>	<b>9 152</b>	<b>8 286</b>	<b>8 406</b>	<b>8 639</b>
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	3 067	2 956	2 923	2 636	2 468	2 655
CDR VILLAGES WITH A GEOGRAPHICAL NAME	6 145	6 049	6 229	5 650	5 938	5 984
<b>SOUTHERN CRUS</b>	<b>7 812</b>	<b>7 709</b>	<b>7 805</b>	<b>7 748</b>	<b>7 702</b>	<b>7 789</b>
<b>Beaumes-de-Venise</b>	649	660	675	680	692	705
<b>Cairanne</b>	864	846	865	877	876	877
<b>Gigondas</b>	1 194	1 189	1 199	1 225	1 202	1 191
<b>Lirac</b>	848	795	857	818	796	854
<b>Rasteau Still wine</b>	941	953	951	940	961	942
<b>Tavel</b>	895	904	898	905	896	887
<b>Vacqueyras</b>	1 419	1 438	1 443	1 452	1 447	1 474
<b>Vinsobres</b>	614	563	570	531	522	547
<b>Muscat de Beaumes-de-Venise</b>	377	355	332	314	305	295
<b>Rasteau VDN</b>	11	6	15	6	5	17
<b>NORTHERN CRUS</b>	<b>3 887</b>	<b>4 004</b>	<b>4 051</b>	<b>4 121</b>	<b>4 186</b>	<b>4 273</b>
<b>Château-Grillet</b>	3	3	3	3	3	4
<b>Condrieu</b>	197	200	203	209	206	215
<b>Cornas</b>	145	150	156	155	155	159
<b>Côte-Rôtie</b>	309	319	323	330	327	333
<b>Crozes-Hermitage</b>	1 696	1 768	1 778	1 818	1 869	1 964
<b>Hermitage</b>	136	136	140	134	134	136
<b>Saint-Joseph</b>	1 305	1 330	1 348	1 370	1 382	1 352
<b>Saint-Péray</b>	96	98	100	103	109	111
<b>OTHER RHONE VALLEY AOP WINES</b>	<b>16 980</b>	<b>16 665</b>	<b>16 311</b>	<b>15 294</b>	<b>15 373</b>	<b>14 998</b>
<b>Clairette de Bellegarde</b>	8	8	7	6	6	6
<b>Clairette de Die **</b>	1 609	1 629	1 582	1 559	1 404	1 431
<b>Châtillon-en-Diois**</b>	23	40	43	38	38	39
<b>Coteaux de Die**</b>	1,3	1,2	1,5	1,3	1,3	2
<b>Crémant de Die**</b>	14	30	23	21	31	33
<b>Costières de Nîmes</b>	4 181	3 948	3 680	2 844	3 230	2 859
<b>Côtes du Vivarais</b>	244	284	232	225	183	180
<b>Duché d'Uzès</b>	317	307	322	315	325	321
<b>Grignan-les-Adhémar</b>	1 368	1 354	1 318	1 270	1 165	1 211
<b>Luberon</b>	3 405	3 363	3 397	3 330	3 367	3 130
<b>Ventoux</b>	5 810	5 701	5 706	5 685	5 623	5 638

# 03

STOCKS, CELLAR  
DESPATCHES  
AND BULK  
CONTRACTUALIZATION







# PHYSICAL STOCKS OF RHÔNE VALLEY AOP WINES

Physical stocks at 31 July 2022.

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

	PRODUCTION STOCKS		TRADERS STOCKS	
	Volume (in hl)	Evolution in %	Volume (in hl)	Evolution in %
<b>TOTAL RHONE VALLEY VINEYARDS</b>	<b>2 452 424</b>	<b>+1%</b>	<b>760 229</b>	<b>- 16%</b>
<b>CDR + CDR VILLAGES</b>	<b>1 492 638</b>	<b>+ 6%</b>	<b>431 224</b>	<b>- 20%</b>
<b>CDR + CDR VILL + CRUS</b>	<b>1 905 388</b>	<b>+ 4%</b>	<b>621 157</b>	
<b>Côtes du Rhône</b>	<b>1 148 954</b>	<b>+ 9%</b>	<b>368 555</b>	<b>- 19%</b>
<b>Côtes du Rhône Villages</b>	<b>343 684</b>	<b>- 3%</b>	<b>62 669</b>	
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	99 538	- 1%	33 903	- 26%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	244 146	- 4%	28 765	- 19%
<b>SOUTHERN CRUS</b>	<b>286 469</b>	<b>- 5%</b>	<b>60 482</b>	<b>- 22%</b>
Beaumes-de-Venise	24 344	- 10%	3 097	- 26%
Cairanne	32 661	- 5%	10 763	- 23%
Gigondas	43 196	- 9%	16 403	- 32%
Lirac	32 999	+ 1%	2 242	- 26%
Rasteau Still wine	49 165	+ 10%	4 970	- 29%
Tavel	14 546	+ 49%	2 469	- 12%
Vacqueyras	44 337	- 21%	15 650	- 12%
Vinsobres	29 867	0%	4 460	0%
Muscat de Beaumes-de-Venise	13 914	- 13%	400	- 24%
Rasteau VDN	1 440	- 33%	28	- 7%
<b>NORTHERN CRUS</b>	<b>126 281</b>	<b>- 4%</b>	<b>129 451</b>	<b>- 7%</b>
Château-Grillet	132	- 20%		
Condrieu	2 577	- 27%	7 008	- 29%
Cornas	5 656	- 5%	6 395	+ 1%
Côte-Rôtie	11 941	- 8%	15 509	- 10%
Crozes-Hermitage	57 303	- 3%	48 872	- 1%
Hermitage	5 223	- 15%	13 893	-8%
Saint-Joseph	41 041	0%	34 940	- 10%
Saint-Péray	2 408	- 13%	2 834	- 5%
<b>OTHER RHONE VALLEY AOP WINES</b>	<b>547 036</b>	<b>- 8%</b>	<b>139 073</b>	<b>- 12%</b>
Clairette de Bellegarde	361	- 23%	29	- 24%
Clairette de Die	99 857	- 9%	29 483	- 10%
Châtillon-en-Diois	954	- 29%	584	+ 15%
Coteaux de Die	75	- 14%	27	0%
Crémant de Die	4 538	- 3%	1 272	- 23%
Costières de Nîmes	115 308	+ 8%	9 548	- 41%
Côtes du Vivarais	7 135	- 2%	1 798	- 32%
Duché d'Uzès	8 827	- 7%	1 124	- 22%
Grignan-les-Adhémar	56 297	- 4%	6 663	- 12%
Luberon	106 381	- 15%	35 519	+ 15%
Ventoux	147 303	- 16%	53 024	- 17%



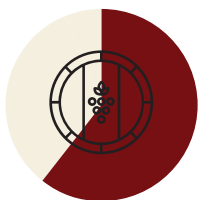
# RHÔNE VALLEY AOP WINE

## CELLAR DESPATCHES IN 2021/2022

Sources: DRM, SV12 - Inter Rhône 2022 - Except Châteauneuf du Pape

### BREAKDOWN OF CELLAR DESPATCHES BY TYPES

#### BULK



60%

1 460 856 hl

OF WHICH:



#### PACKAGED



34%

880 880 hl

OF WHICH:



#### FRESH GRAPES



6%

119 491 hl

OF WHICH:





# RHÔNE VALLEY AOP WINE

## CELLAR DESPATCHES IN 2021/2022

Sources: DRM, SVI2 - Inter Rhône 2022 - except Châteauneuf du Pape

in hl	Bulk	Packaged	Fresh grapes	Other despatches	Total cellar despatches
<b>TOTAL RHÔNE VALLEY VINEYARDS</b>	<b>1 460 856</b>	<b>880 880</b>	<b>119 491</b>	<b>8 897</b>	<b>2 470 124</b>
<b>CDR + CDR VILLAGES</b>	<b>1 012 651</b>	<b>402 016</b>	<b>42 325</b>	<b>4 298</b>	<b>1 461 289</b>
<b>CDR + CDR VILLAGES + CRUS</b>	<b>1 120 695</b>	<b>629 688</b>	<b>98 600</b>	<b>7 527</b>	<b>1 856 510</b>
<b>Côtes du Rhône</b>	<b>864 364</b>	<b>303 843</b>	<b>32 671</b>	<b>3 391</b>	<b>1 204 269</b>
<b>Côtes du Rhône Villages</b>	<b>148 287</b>	<b>98 173</b>	<b>9 654</b>	<b>907</b>	<b>257 020</b>
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	84 173	23 788	4 516	245	112 723
CDR VILLAGES WITH A GEOGRAPHICAL NAME	64 114	74 384	5 137	663	144 298
<b>SOUTHERN CRUS</b>	<b>79 233</b>	<b>138 815</b>	<b>11 409</b>	<b>1 476</b>	<b>230 933</b>
<b>Beaumes-de-Venise</b>	5 480	16 602	990	47	23 119
<b>Cairanne</b>	8 970	14 610	2 824	96	26 499
<b>Gigondas</b>	18 856	16 472	2 329	404	38 061
<b>Lirac</b>	4 740	15 578	-	286	20 604
<b>Rasteau Still wine</b>	9 682	16 296	821	259	27 058
<b>Tavel</b>	12 769	18 692	762	122	32 345
<b>Vacqueyras</b>	12 860	27 210	2 426	114	42 610
<b>Vinsobres</b>	5 686	6 609	1 173	116	13 584
<b>Muscat de Beaumes-de-Venise</b>	190	6 271	84	23	6 567
<b>Rasteau VDN</b>	-	477	-	9	486
<b>NORTHERN CRUS</b>	<b>28 811</b>	<b>88 858</b>	<b>44 866</b>	<b>1 753</b>	<b>164 288</b>
<b>Château-Grillet</b>					-
<b>Condrieu</b>	550	2 245	2 648	78	5 521
<b>Cornas</b>	589	2 804	1 949	43	5 385
<b>Côte-Rôtie</b>	1 696	4 876	4 224	61	10 858
<b>Crozes-Hermitage</b>	14 000	47 059	19 763	409	81 231
<b>Hermitage</b>	1 025	1 268	2 185	24	4 502
<b>Saint-Joseph</b>	10 685	28 675	12 649	1 107	53 116
<b>Saint-Péray</b>	265	1 931	1 448	31	3 675
<b>OTHER RHONE VALLEY AOP WINES</b>	<b>340 161</b>	<b>251 191</b>	<b>20 891</b>	<b>1 370</b>	<b>613 613</b>
<b>Clairette de Bellegarde</b>	30	200	-	-	230
<b>Clairette de Die*</b>	9 678	42 500	9 906	327	62 412
<b>Châtillon en Diois*</b>	64	1 352	201	4	1 622
<b>Coteaux de Die*</b>	6	36	-	1	43
<b>Crémant de Die*</b>	58	1 362	-	14	1 434
<b>Costières de Nîmes</b>	84 018	55 984	-	107	140 110
<b>Côtes du Vivarais</b>	4 502	1 369	111	45	6 027
<b>Duché d'Uzès</b>	635	7 245	672	53	8 605
<b>Grignan Les Adhémar</b>	21 137	20 780	395	96	42 408
<b>Luberon</b>	102 557	33 474	202	142	136 374
<b>Ventoux</b>	117 477	86 888	9 404	580	214 349



# EVOLUTION OF RHÔNE VALLEY AOP WINE CELLAR DESPATCHES

Sources: DRM, SV12 - Inter Rhône 2022 - except Châteauneuf du Pape

In hl	Campaign					Evol N-1
	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	
<b>TOTAL RHÔNE VALLEY VINEYARDS</b>	<b>2 817 448</b>	<b>2 659 411</b>	<b>2 459 127</b>	<b>2 545 476</b>	<b>2 470 124</b>	- 3%
<b>CDR + CDR VILLAGES</b>	<b>1 705 286</b>	<b>1 583 170</b>	<b>1 460 046</b>	<b>1 504 186</b>	<b>1 461 289</b>	- 3%
<b>CDR + CDR VILL + CRUS</b>	<b>2 084 754</b>	<b>1 949 034</b>	<b>1 807 428</b>	<b>1 884 065</b>	<b>1 856 510</b>	- 1%
<b>Côtes du Rhône</b>	<b>1 414 314</b>	<b>1 314 003</b>	<b>1 217 561</b>	<b>1 244 230</b>	<b>1 204 269</b>	- 3%
<b>Côtes du Rhône Villages</b>	<b>290 972</b>	<b>269 167</b>	<b>242 484</b>	<b>259 956</b>	<b>257 020</b>	- 1%
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	142 261	121 215	118 118	123 635	112 723	- 9%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	148 711	147 952	124 367	136 321	144 298	+ 6%
<b>SOUTHERN CRUS</b>	<b>227 416</b>	<b>218 491</b>	<b>207 938</b>	<b>228 012</b>	<b>230 933</b>	+ 1%
<b>Beaumes-de-Venise</b>	20 780	22 867	20 008	23 946	23 119	- 3%
<b>Cairanne</b>	17 960	20 231	21 284	25 333	26 499	+ 5%
<b>Gigondas</b>	37 130	33 830	33 871	35 418	38 061	+ 7%
<b>Lirac</b>	18 036	16 563	16 186	18 093	20 604	+ 14%
<b>Rasteau Still wine</b>	32 342	26 528	27 145	27 925	27 058	- 3%
<b>Tavel</b>	31 412	33 247	28 729	31 810	32 345	+ 2%
<b>Vacqueyras</b>	47 847	45 108	41 156	43 467	42 610	- 2%
<b>Vinsobres</b>	13 839	12 036	12 281	14 903	13 584	- 9%
<b>Muscat de Beaumes-de-Venise</b>	7 536	7 421	6 872	6 719	6 567	- 2%
<b>Rasteau VDN</b>	533	661	408	398	486	+ 22%
<b>NORTHERN CRUS</b>	<b>152 052</b>	<b>147 374</b>	<b>139 445</b>	<b>151 867</b>	<b>164 288</b>	+ 8%
<b>Château-Grillet</b>						
<b>Condrieu</b>	6 207	7 609	6 941	7 452	5 521	- 26%
<b>Cornas</b>	5 001	4 602	4 402	5 154	5 385	+ 4%
<b>Côte-Rôtie</b>	11 916	10 912	10 869	11 176	10 858	- 3%
<b>Crozes-Hermitage</b>	70 484	69 070	63 044	72 916	81 231	+ 11%
<b>Hermitage</b>	4 256	3 899	4 207	4 218	4 502	+ 7%
<b>Saint-Joseph</b>	51 300	48 363	46 699	47 819	53 116	+ 11%
<b>Saint-Péray</b>	2 888	2 919	3 284	3 132	3 675	+ 17%
<b>OTHER RHONE VALLEY AOP WINES</b>	<b>732 694</b>	<b>710 377</b>	<b>651 698</b>	<b>661 411</b>	<b>613 613</b>	- 7%
<b>Clairette de Bellegarde</b>	181	214	176	237	230	- 3%
<b>Clairette de Die*</b>	77 948**	78 507	65 275	68 634	62 412	- 9%
<b>Châtillon en Diois*</b>	833**	1 473	1 646	2 112	1 622	- 23%
<b>Coteaux de Die*</b>	49**	49	62	65	43	- 34%
<b>Crémant de Die*</b>	1 508**	1 877	1 497	1 322	1 434	+ 8%
<b>Costières de Nîmes</b>	184 850	188 552	154 360	159 873	140 110	- 12%
<b>Côtes du Vivarais</b>	10 299	7 625	6 914	7 157	6 027	- 16%
<b>Duché d'Uzès</b>	6 815	6 854	6 790	8 357	8 605	+ 3%
<b>Grignan-les-Adhémar</b>	50 604	47 531	37 089	42 171	42 408	+ 1%
<b>Luberon</b>	148 076	146 753	136 754	130 425	136 374	+ 5%
<b>Ventoux</b>	251 530	230 941	241 135	241 058	214 349	- 11%



# EVOLUTION OF RHÔNE VALLEY AOP WINE BULK CONTRACTUALIZATION

Sources : Contrats interprofessionnels, Inter Rhône 2022 - hors Châteauneuf du Pape

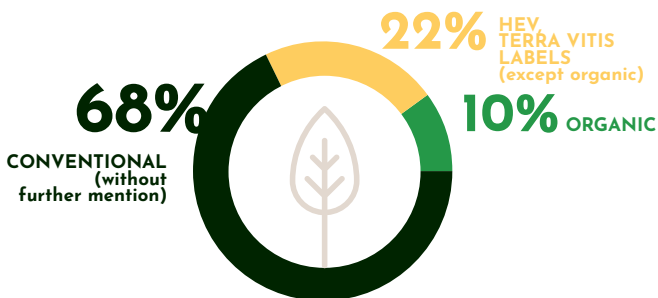
In hl	Campaign					Evol N-1
	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	
<b>TOTAL RHÔNE VALLEY VINEYARDS</b>	1 756 319	1 640 796	1 566 550	1 670 945	1 489 900	-11%
<b>Côtes du Rhône</b>	1 042 069	990 260	927 558	970 485	884 408	- 9%
<b>Côtes du Rhône Villages</b>	173 088	144 158	130 477	162 239	159 246	- 2%
CDR VILLAGES WITHOUT A GEOGRAPHICAL NAME	104 970	81 913	80 989	99 692	96 023	- 4%
CDR VILLAGES WITH A GEOGRAPHICAL NAME	68 118	62 245	49 488	62 547	63 223	+ 1%
<b>SOUTHERN CRUS</b>	75 216	84 510	69 942	85 238	75 359	-12%
<b>Beaumes-de-Venise</b>	2 506	3 703	3 290	5 614	4 601	- 18%
<b>Cairanne</b>	8 108	11 060	7 967	10 896	10 709	- 2%
<b>Gigondas</b>	14 317	16 064	17 852	18 472	18 436	0%
<b>Lirac</b>	4 634	4 995	4 240	4 157	4 745	+ 14%
<b>Rasteau Still wine</b>	11 610	10 068	9 714	10 401	9 507	- 9%
<b>Tavel</b>	12 160	14 874	10 820	14 176	9 918	- 30%
<b>Vacqueyras</b>	14 574	12 393	11 279	16 705	10 698	- 36%
<b>Vinsobres</b>	6 797	10 645	4 066	4 102	6 323	+ 54%
<b>Muscat de Beaumes-de-Venise</b>	510	708	714	715	422	- 41%
<b>Rasteau VDN</b>						
<b>NORTHERN CRUS</b>	28 981	28 181	29 597	32 666	35 148	+ 8%
<b>Château-Grillet</b>						
<b>Condrieu</b>	1 014	1 285	1 125	1 406	1 097	- 22%
<b>Cornas</b>	384	345	416	458	722	+ 58%
<b>Côte-Rôtie</b>	2 303	2 272	3 255	3 524	1 959	- 44%
<b>Crozes-Hermitage</b>	11 868	11 476	11 480	14 164	17 944	+ 27%
<b>Hermitage</b>	600	713	805	864	1 014	+ 17%
<b>Saint-Joseph</b>	12 631	11 954	12 273	11 991	12 148	+ 1%
<b>Saint-Péray tranquille</b>	181	136	243	259	264	+ 2%
<b>OTHER RHONE VALLEY AOP WINES</b>	436 965	393 687	408 975	420 317	335 739	-20%
<b>Clairette de Bellegarde</b>						
<b>Clairette de Die*</b>			14 199	19 609	7 420	-62%
<b>Châtillon en Diois*</b>			100	297	48	-84%
<b>Coteaux de Die*</b>				13	15	
<b>Crémant de Die*</b>		65	100	10	82	+720%
<b>Costières de Nîmes</b>	143 996	103 361	101 818	104 211	84 873	-19%
<b>Côtes du Vivarais</b>	6 988	6 615	6 120	7 681	3 579	-53%
<b>Duché d'Uzès</b>	1 408	647	800	709	659	-7%
<b>Grignan-les-Adhémar</b>	32 028	16 796	17 590	25 583	17 547	-31%
<b>Luberon</b>	117 008	120 835	120 144	99 137	97 112	-2%
<b>Ventoux</b>	135 537	145 368	148 105	163 067	124 404	-24%

\* Entry into the interprofession on 1 January 2019

# BULK CONTRACTUALIZATION WITH SUSTAINABLE DEVELOPMENT LABELS

Sources: Interprofessional contracts - Inter Rhône 2022  
except Châteauneuf du Pape

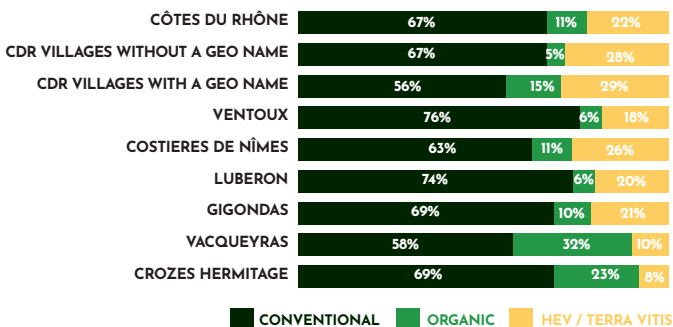
## IBULK CONTRACTUALIZATION: BREAKDOWN OF THE SUSTAINABLE DEVELOPMENT LABELS



## EVOLUTION OF THE BULK CONTRACTUALIZATION WITH SUSTAINABLE DEVELOPMENT LABELS

	VOLUME	EVOLUTION VS N-1	EVOLUTION VS N-5
Total	1 489 900	-11%	-16%
Conventional	1 013 234	-22%	-39%
Organic	144 082	-5%	+33%
HEV / Terra Vitis	332 584	+41%	-

## CONTRACTUALISED VOLUMES WITH SUSTAINABLE DEVELOPMENT LABELS



**22%**  
OF CONTRACTUALISED VOLUMES ON  
THE 2021-2022 CAMPAIGN WERE  
**HEV AND/OR TERRA VITIS CERTIFIED**

# 04

SALES AND  
EXPORTS





# SALES OF RHÔNE VALLEY AOP WINES BY DISTRIBUTION CHANNELS

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

## BREAKDOWN BY DISTRIBUTION CHANNEL IN 2022

by volume, in millions of bottles.

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

### SUPERMARKETS FRANCE



**38%**

**936 196 hl**  
**125 M bottles**

i.e. 203 712 hl  
including discounters  
(french & german)  
+ others supermarkets  
channels

### TRADITIONNALS CHANNELS DIRECT SALES, HORECA, LIQUOR STORE



**26%**

**648 164 hl**  
**86 M bottles**

### EXPORT



**36%**

**885 764 hl**  
**118 M bottles**

## TOP 10 EXPORT DESTINATIONS FOR RHONE VALLEY AOC WINES IN 2022



	BELGIUM	18%
	UK	15%
	USA	14%
	CANADA	9%
	GERMANY	7%
	SWEDEN	6%
	CHINA	5%
	SWITZERLAND	4%
	DENMARK	3%
	NORWAY	3%





# SALES OF RHÔNE VALLEY AOP WINES BY DISTRIBUTION CHANNELS

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

## 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	38%	26%	36%	1 204 269	Estimation IR 2022
Côtes du Rhône Villages	29%	35%	36%	257 020	Estimation IR 2022
Beaumes de Venise	43%	48%	9%	23 119	Estimation IR 2022
Cairanne	22%	33%	45%	26 499	Estimation IR 2022
Gigondas	18%	35%	47%	38 061	Etude de Flux IR 2022
Lirac	6%	53%	41%	20 604	Estimation IR 2022
Rasteau Still wine	26%	45%	29%	27 058	Estimation IR 2022
Tavel	34%	24%	42%	32 345	Estimation IR 2022
Vacqueyras	20%	48%	32%	42 610	Estimation IR 2022
Vinsobres	15%	47%	38%	13 584	Estimation IR 2022
Muscat de Beaumes-de-Venise	46%	36%	18%	6 567	Estimation IR 2022
Rasteau VDN	9%	78%	13%	486	Estimation IR 2022
Condrieu	6%	62%	32%	5 521	Estimation IR 2022
Cornas	6%	61%	33%	5 385	Estimation IR 2022
Côte-Rôtie	6%	61%	33%	10 858	Estimation IR 2022
Crozes-Hermitage	17%	56%	27%	81 231	Estimation IR 2022
Hermitage	2%	49%	49%	4 502	Estimation IR 2022
Saint Joseph	15%	68%	17%	53 116	Estimation IR 2022
Saint Péray	6%	75%	19%	3 675	Estimation IR 2022
Clairette de Bellegarde	4%	89%	7%	230	Estimation IR 2022
Clairette de Die	59%	30%	11%	62 412	Estimation IR 2022
Costières de Nîmes	30%	28%	42%	140 110	Estimation IR 2022
Côtes du Vivarais	26%	69%	5%	6 027	Etude de Flux IR 2020
Duchés d'Uzès	7%	86%	7%	8 605	Estimation IR 2022
Grignan les Adhémar	16%	64%	20%	42 408	Etude de Flux IR 2022
Luberon	23%	43%	34%	136 374	Estimation IR 2022
Ventoux	41%	29%	30%	214 349	Estimation IR 2022

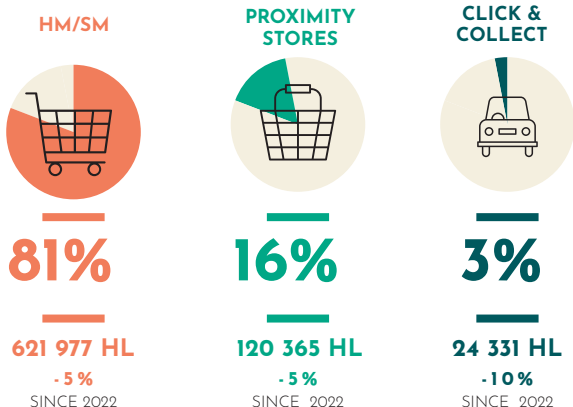
## BREAKDOWN OF RHÔNE VALLEY AOP WINE EXPORTS BY COUNTRY

In volume	Belgium	USA	United Kingdom	Sweden	Germany	Canada	China	Denmark	Netherlands	Switzerland	Japan	Other countries
Côtes du Rhône	20%	15%	13%	8%	7%	6%	5%	3%	3%	3%	1%	16%
Côtes du Rhône Villages	12%	15%	38%	2%	5%	7%	2%	3%	4%	1%	1%	10%
Southern Crus	15%	21%	15%	4%	7%	6%	2%	4%	2%	8%	1%	15%
Northern Crus	10%	18%	15%	4%	4%	7%	2%	2%	3%	7%	3%	24%
Costières de Nîmes	13%	8%	22%	1%	10%	9%	20%	2%	3%	2%	2%	9%
Grignan-les-Adhémar	6%	5%	3%	0%	10%	6%	50%	0%	7%	3%	4%	5%
Luberon	13%	5%	8%	2%	24%	24%	2%	1%	2%	1%	2%	16%
Ventoux	17%	4%	7%	2%	7%	39%	2%	6%	3%	1%	1%	11%
Clairette and Crémant de Die	43%	0%	0%	1%	0%	0%	2%	0%	6%	42%	1%	4%

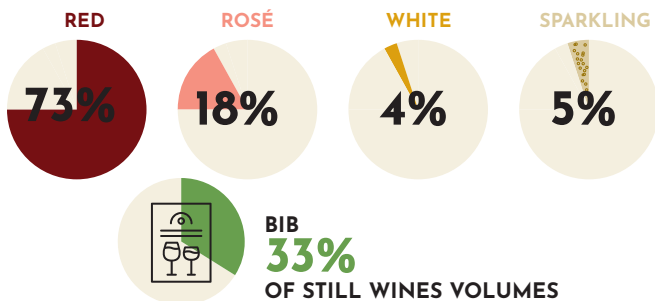
# THE FRENCH MARKET : SALES OF RHÔNE VALLEY AOP WINES IN THE SUPERMARKET CHANNEL

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

## BREAKDOWN BY CHANNEL IN 2022







## BREAKDOWN BY COLOUR IN 2022



## THE DYNAMISM OF THE RHÔNE VALLEY WHITE WINES

Sources: IRI Panels excluding Discounters  
Still wines only - Annual percentage change, by colour and in volume

	2018	2 019	2 020	2021	2 022
 TOTAL Rhône Valley Vineyards	-3%	-7%	-1%	-6%	-5%
 RED	-5%	-9%	-1%	-5%	-7%
 ROSÉ	+6%	-2%	0%	-13%	0%
 WHITE	+8%	+1%	+8%	+6%	+8%

**€476**  
MILLIONS

**102**  
MILLION BOTTLES



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

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

## HYPER / SUPERMARKETS IN 2022

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.

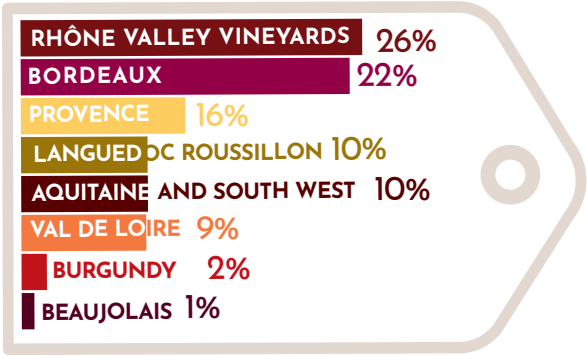
	WD**	"VOLUME (IN HL)"	VOLUME EVOLUTION	AVG PRICE €/BOTTLE INC VAT	AVG PRICE EVOLUTION
Côtes du Rhône	100	302 883	-4,5%	3,62	+3,3%
Côtes du Rhône Villages	99	62 098	-7,5%	5,04	+2,4%
Beaumes-de-Venise	77	9 890	-7,5%	7,55	+2,7%
Cairanne	62	5 835	+2,2%	6,54	+2,1%
Gigondas	78	5 732	-10,3%	13,10	+5,1%
Lirac	27	1 223	-6,2%	7,36	+2,8%
Rasteau Still wine	75	7 061	-7,2%	7,46	+2,3%
Tavel	84	11 133	-1,2%	6,65	+2,5%
Vacqueyras	78	8 439	-14,6%	9,65	+8,0%
Vinsobres	29	2 080	-9,4%	6,50	+2,4%
Condrieu	16	318	-7,4%	29,62	+2,2%
Cornas	15	300	-7,3%	24,24	+5,6%
Côte-Rôtie	25	627	-15,8%	38,31	+7,7%
Crozes-Hermitage	88	13 630	-8,3%	10,44	+5,0%
Hermitage	7	102	-12,8%	33,97	-2,2%
Saint Joseph	70	7 783	-12,2%	13,36	+6,8%
Saint Péray tranquille	6	171	+7,1%	11,65	+10,2%
Costières de Nîmes	89	33 883	+0,9%	3,11	+2,4%
Côtes du Vivarais	7	1 574	+8,1%	2,91	+0,2%
Duché d'Uzès	4	590	-1,0%	6,18	+1,8%
Luberon	89	31 682	+4,2%	3,81	+3,0%
Grignan-les-Adhémar	55	7 383	+8,8%	3,33	+4,8%
Ventoux	98	68 534	-6,3%	3,23	+4,4%
Clairette de Die	98	34 515	-1,5%	5,84	+1,9%
Crémant de Die	4	190	-15,0%	6,04	-2,6%



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

Sources: IRI Panels excluding Discounters, Inter Rhône

## 2022 MARKET SHARE IN VOLUME



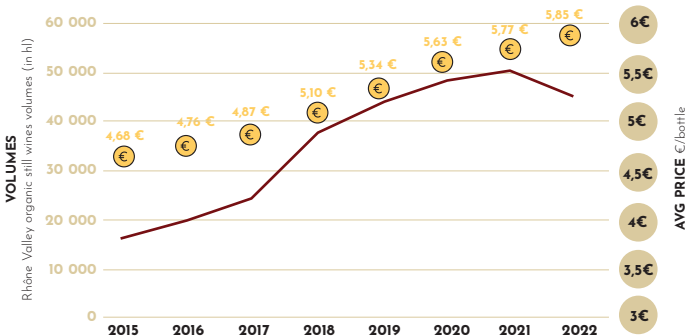
SALES OF ORGANIC WINES IN SUPERMARKETS HAS DECLINED SIGNIFICANTLY OVER THE PAST YEAR.

THE AOP CATEGORY IN SUPERMARKETS SHOWS A DECREASE OF **-9% IN VOLUME AND -6% 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 -11% IN VOLUME AND -9.3% IN VALUE.**

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



# TRADITIONAL CHANNELS

## 2021-2022 WINE MERCHANTS OFFER REPORT

Source: French Wine Merchants Offer Report CNIV/Symétris.  
Survey conducted between October 2021 and April 2022 among 327 wine merchants.

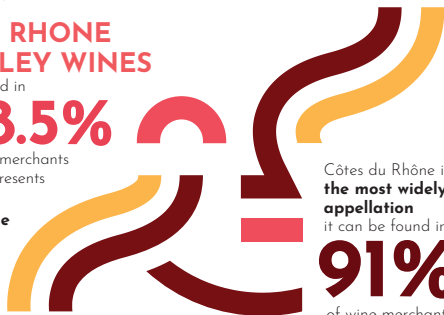
### THE RHONE VALLEY WINES

are listed in

**98.5%**

of wine merchants and represents

**10% of the wine offer.**



Côtes du Rhône is **the most widely distributed appellation**

it can be found in

**91%**

of wine merchants.

- In the National Top 5, we also find St Joseph (85%) and Crozes Hermitage (84%)

### RHÔNE VALLEY VINEYARDS AOCs

represent:

**12%** of red wine SKUs and are present in **98% of points of sale**

**8%** of dry white wine SKUs, present in **94% of points of sale**

**5%** of rosé wine SKUs present in **47% of points of sale**

**2%** of sparkling wines (except Champagne), in **13% of points of sale**

**12%** of fortified wines and aperitif wines, in **20% of points of sale**

## 2022 RESTAURANT OFFER REPORT

Source: Restaurant wine list report CNIV/France AgriMer/Symétris.  
Survey conducted between March 2022 and June 2022 among 1203 restaurants in France (excluding Corsica)

The Rhone Valley AOCs ranks first among regions and are present on the menu of

**78%**

of the restaurants in the sample, representing **13.9% of the wine offer**



The Côtes du Rhône wines can be found on the menu of

**53%**

of the restaurants

- Among the top 10 appellations, we also find Crozes Hermitage (39%) and St Joseph (29%).

### RHÔNE VALLEY VINEYARDS AOCs

represent

**18%** of the red wine SKUs on **77% of the restaurant menus (ranked #1)**

**10%** of the dry white wine SKUs on **34% of the restaurant menus**

**6%** of the rosé wine SKUs **12% of the restaurant menus (ranked #2 for AOC region)**

# 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 2022

In hl	Côtes du Rhône (rég, vill, crus)		Other Rhône Valley AOP wines		TOTAL Rhône Valley 2022	
	Red/Rosés	Whites	Reds/Rosés	Whites (with Clairette de Die and Diois Wines)		Breakdown as %
Belgium	126 402	6 122	18 646	5 174	156 345	18%
United Kingdom	113 273	5 847	15 686	1 097	135 904	15%
USA	109 963	6 995	7 295	1 851	126 104	14%
Canada	41 700	6 499	20 616	7 779	76 594	9%
Germany	45 017	2 427	14 173	3 402	65 020	7%
Sweden	47 587	2 922	1 242	503	52 254	6%
China	26 419	986	15 084	698	43 187	5%
Norway	24 708	539	1 335	3 578	30 160	3%
Switzerland	23 427	1 217	3 731	390	28 765	3%
Denmark	24 095	1 123	3 161	49	28 428	3%
The Netherlands	20 712	2 524	3 416	1 229	27 880	3%
Japan	9 187	1 657	1 245	1 374	13 463	2%
Other Europe	38 670	2 793	5 964	1 178	48 605	5%
Other Countries	43 210	2 310	6 172	1 363	53 055	6%
<b>TOTAL</b>	<b>694 371</b>	<b>43 961</b>	<b>117 766</b>	<b>29 666</b>	<b>885 764</b>	<b>100%</b>

## TOTAL RHÔNE VALLEY VINEYARDS AOP WINES (ALL COLOURS)

	VOLUME in hl			VALUE in millions of euros		
	2021	2022	Evol	2021	2022	Evol
Belgium	180 125	156 345	📉 -13%	76	64	📉 -15%
United Kingdom	149 118	135 904	📉 -9%	86	84	📉 -2%
USA	140 125	126 104	📉 -10%	109	118	📈 +9%
Canada	76 781	76 594	→ 0%	51	54	📈 +4%
Germany	59 375	65 020	📈 +10%	33	35	📈 +6%
Sweden	53 666	52 254	📉 -3%	29	29	📉 -1%
China	53 026	43 187	📉 -19%	27	25	📉 -8%
Switzerland	33 428	30 160	📉 -10%	28	29	📈 +1%
Denmark	30 573	28 765	📉 -6%	19	19	📉 -1%
Norway	34 534	28 428	📉 -18%	19	17	📉 -7%
The Netherlands	27 613	27 880	📈 +1%	16	16	📈 +2%
Japan	12 962	13 463	📈 +4%	11	12	📈 +10%
Other Europe	48 329	48 605	📈 +1%	31	30	📉 -2%
Other Countries	51 100	53 055	📈 +4%	55	55	→ 0%
<b>TOTAL</b>	<b>950 755</b>	<b>885 764</b>	📉 -7%	<b>590</b>	<b>587</b>	📉 -0,5%

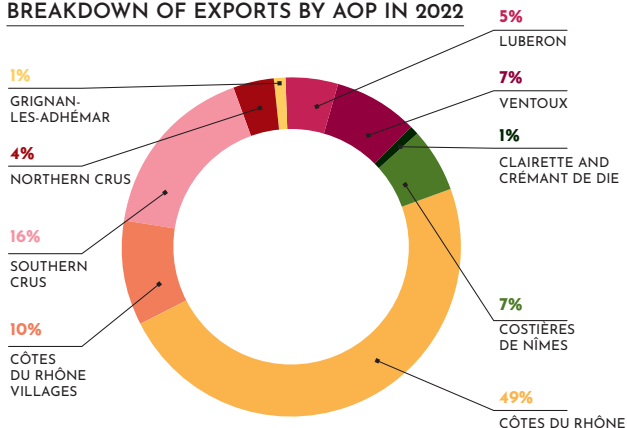
€587 MILLIONS

118 MILLION BOTTLES

# EXPORTS OF RHÔNE VALLEY AOP WINES

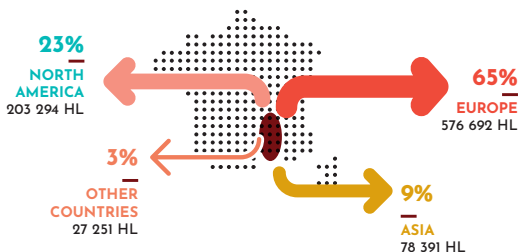
Sources : French Customs Authorities, Inter Rhône estimates  
Still wines and sparkling wines. Chateauneuf du Pape included

## BREAKDOWN OF EXPORTS BY AOP IN 2022



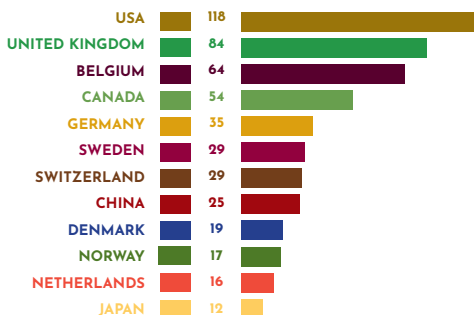
## BREAKDOWN OF EXPORTS BY GEOGRAPHICAL REGION IN 2022

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



## BREAKDOWN BY VALUE IN 2022

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





# RHÔNE VALLEY VINEYARDS



**65 197 HECTARES  
AND 2,6 MILLIONS  
HECTOLITERS  
PRODUCED IN  
THE 2022 VINTAGE**



**1 682 PRODUCTION  
UNITS, OF WHICH  
1 592 INDEPENDANT  
WINERIES  
90 COOPERATIVE  
WINERIES**



**186 EXPORT  
DESTINATIONS  
AROUND THE  
WORLD CONSUMED  
RHÔNE VALLEY  
WINES IN 2022**



**329 MILLIONS BOTTLES  
SOLD IN 2022**



**434 TRADING  
COMPANIES**



**IN THE RHÔNE VALLEY  
VINEYARDS, ORGANIC  
WINES REPRESENT  
18% IN VOLUME  
AND 20% IN AREA  
OF THE 2022 HARVEST**

**HVE 3 LABEL REPRESENTS  
24% OF VOLUMES  
AND 28% OF AREAS  
OF THE 2022 HARVEST.**



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

**FOR FURTHER INFORMATION, PLEASE  
CONTACT THE ECONOMIC DEPARTMENT:**

Sébastien Lacroix  
Dominique Taillon  
Benjamin Echard  
Echat Soilihi

slacroix@inter-rhone.com

Tel: +33 (0)4 90 27 24 00

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

[www.vins-rhone.com](http://www.vins-rhone.com), espace Adhérents



Hospitality in a bottle

Find out more about Rhone valley vineyards AOCs

[vins-rhone.com](http://vins-rhone.com)

