

KEY
FIGURES
2023



VINS DE
PROVENCE

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



ECONOMIC ANALYSIS
DEPARTMENT

LE VIGNOBLE de Provence

AOP

Appellation
d'origines
Protégée

Coteaux d'Aix-en-Provence

Coteaux Varois en Provence

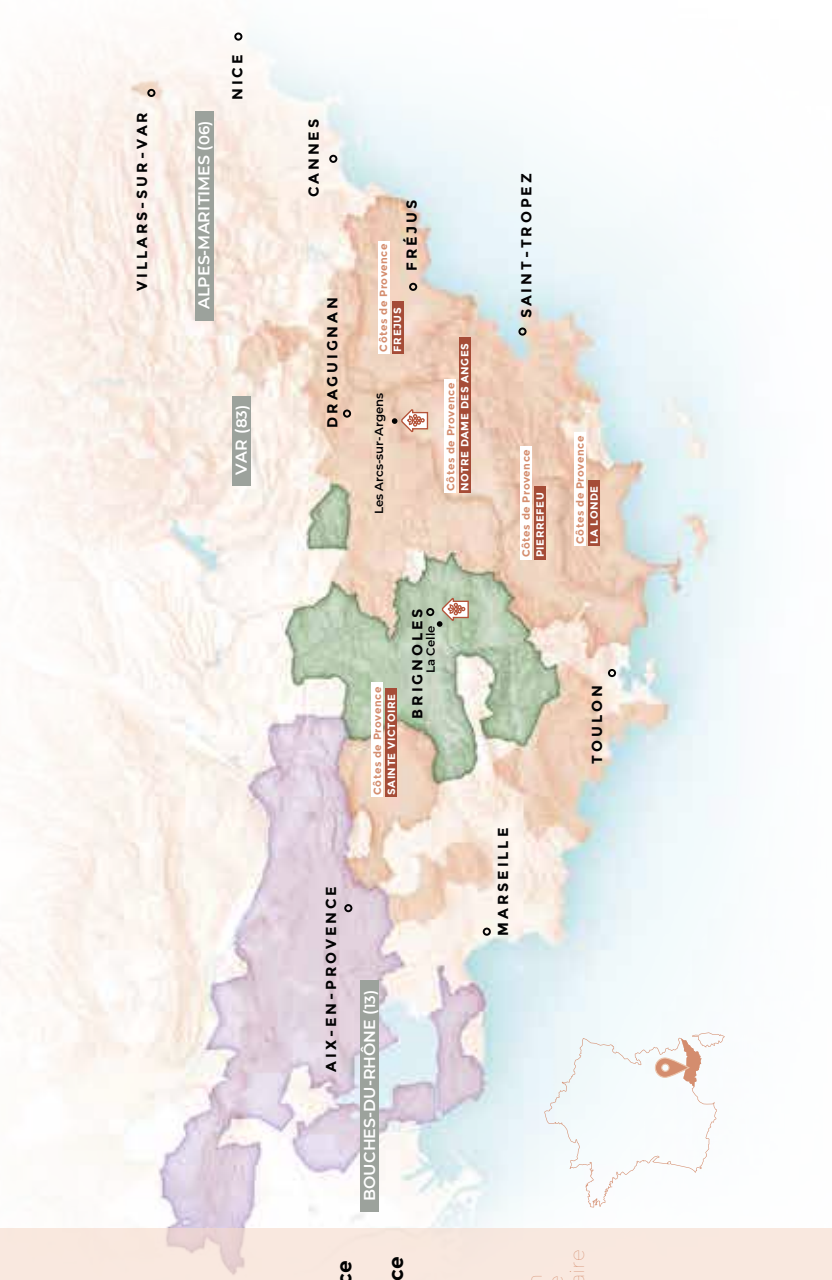
Côtes de Provence

DGC

Dénomination
Géographique
Complémentaire

Côtes de Provence
DGC

Maisons des Vins



KEY FIGURES FOR 2022

Vins de Provence rosés	4
2023 vintage harvest and history	6
2023 releases to market and evolution	8
Structure of the wine region	9
Evolution of sales channels	10
Supermarket sales in France	11
Environmental labels	12
Export sales	14
Rosé Wines World Tracking – Consumption	16
Rosé Wines World Tracking – Production	17
Rosé Wines World Tracking – Imports & exports	18
Calendar of wine declarations	19
Latest figures from the Economic Analysis Department	20

S
I
N
E
M
O
N
T
A
G
E
S

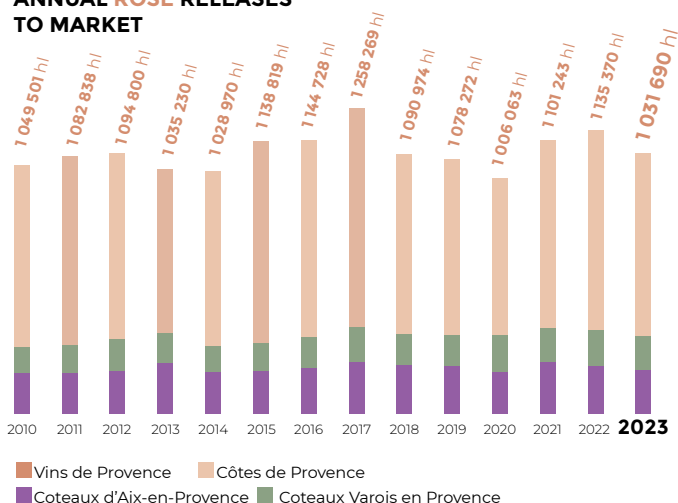
VINS DE PROVENCE ROSÉS

ROSÉ PRODUCTION

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

VINTAGE	VINS DE PROVENCE	CÔTES DE PROVENCE	COTEAUX D'AIX-EN-PROVENCE	COTEAUX VAROIS EN PROVENCE
	Rosé in hl			
2010	1 122 500	843 000	168 500	111 000
2011	1 144 650	865 050	170 600	109 000
2012	1 027 500	752 700	169 800	105 000
2013	1 059 500	801 000	151 000	107 500
2014	1 235 846	930 714	184 793	120 958
2015	1 156 992	863 761	176 527	116 705
2016	1 166 734	876 967	174 741	115 026
2017	1 037 986	777 582	158 949	101 455
2018	1 123 554	810 932	184 793	127 830
2019	1 155 284	833 602	186 012	135 669
2020	1 137 888	803 036	208 126	126 726
2021	1 142 024	828 710	180 080	133 235
2022	1 177 355	836 376	205 309	135 670
2023	1 080 200	768 190	201 553	110 457

ANNUAL ROSÉ RELEASES TO MARKET

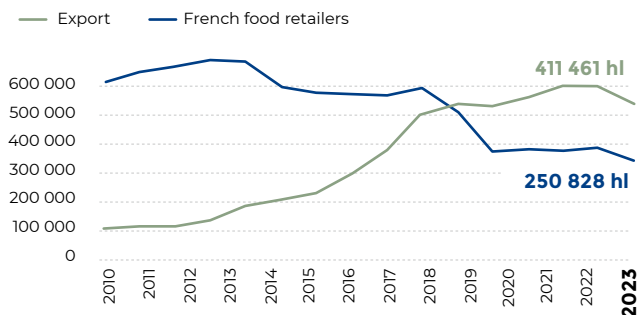


Sales breakdown and evolution for Vins de Provence rosés

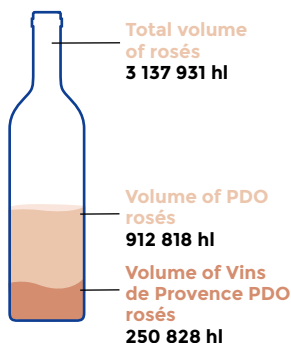
135 millions bottle equivalents sold in 2023.

EVOLUTION OF SALES OF VINS DE PROVENCE ROSÉS BY DISTRIBUTION CHANNEL

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



FRENCH FOOD RETAILERS EN 2023



EVOLUTION OF ROSÉ EXPORTS



More than **55 million** bottles exported in 2023

Total Exports

2019	2023
404 344 hl	411 461 hl
283 255 046 €	346 645 329 €

Up **2% in volume** and **22% in value** in the space in 5 years.

TOP 3 MARKETS IN 2023



1 USA
156 301 hl
143 375 936 €

Equivalent to 21 000 000 bottles



2 UK
75 943 hl
56 380 964 €

Equivalent to 10 000 000 bottles



3 Netherlands
29 901 hl
18 492 706 €

Equivalent to 4 000 000 bottles

2023 VINTAGE HARVEST AND HISTORY


2023 VINS DE PROVENCE REPORTED FIGURES

(CIVP AS PER ODGS, IN HL)




Volume
by colour


ROSÉ : 89%


 Côtes de Provence: 768 190 hl
 Côteaux d'Aix en Provence: 201 553 hl
 Côteaux Varois en Provence: 110 457 hl
Vins de Provence: 1 080 200 hl

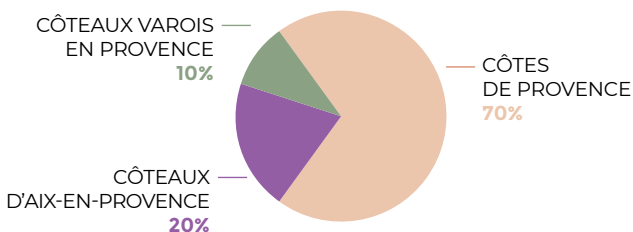
WHITE : 6%


 Côtes de Provence: 48 046 hl
 Côteaux d'Aix en Provence: 20 663 hl
 Côteaux Varois en Provence: 4 145 hl
Vins de Provence: 72 855 hl

RED : 5%


 Côtes de Provence: 40 979 hl
 Côteaux d'Aix en Provence: 16 910 hl
 Côteaux Varois en Provence: 4 126 hl
Vins de Provence: 62 015 hl

ROSÉ HARVEST FIGURES FOR VINS DE PROVENCE 2023



2023 HARVESTS OF CÔTES DE PROVENCE DGCS

BY VOLUME AND AREA, ALL COLOURS COMBINED

LA LONDE



Côtes de Provence LA LONDE

	VOLUME	AREA
Red	939 hl	20 ha
Rosé	4 170 hl	93 ha
white	902 hl	21 ha
TOTAL	6 011 hl	134 ha



Côtes de Provence NOTRE-DAME-DES-ANGES

	VOLUME	AREA
Red	85 hl	3 ha
Rosé	3 075 hl	82 ha
TOTAL	3 160 hl	85 ha



Côtes de Provence SAINTE-VICTOIRE

	VOLUME	AREA
Red	1 247 hl	30 ha
Rosé	26 650 hl	580 ha
TOTAL	27 897 hl	609 ha



Côtes de Provence PIERREFEU

	VOLUME	AREA
Red	186 hl	4 ha
Rosé	3 598 hl	87 ha
TOTAL	3 785 hl	91 ha

FRÉJUS



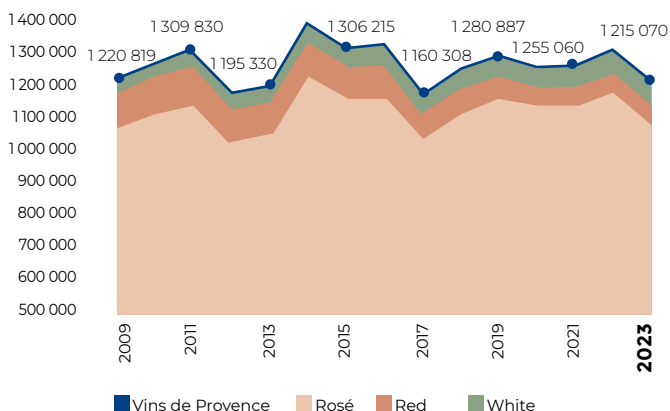
Côtes de Provence FRÉJUS

	VOLUME	AREA
Red	464 hl	11 ha
Rosé	2 035 hl	44 ha
TOTAL	2 499 hl	55 ha

HISTORY OF PROVENCE WINE HARVESTS, BY PDO, ALL COLOURS COMBINED (IN HL)

	VINS DE PROVENCE	CÔTES DE PROVENCE	COTEAUX D'AIX-EN-PROVENCE	COTEAUX VAROIS EN PROVENCE
2010	1 274 500	945 000	205 500	124 000
2011	1 309 830	975 830	211 200	122 800
2012	1 176 600	855 050	203 800	117 750
2013	1 195 330	897 000	179 000	119 330
2014	1 384 900	1 029 500	221 000	134 400
2015	1 306 864	960 864	215 000	131 000
2016	1 317 760	977 639	212 125	127 997
2017	1 163 100	865 000	187 500	110 600
2018	1 242 455	886 907	217 757	137 791
2019	1 280 887	918 024	216 466	146 397
2020	1 246 045	868 538	241 538	135 968
2021	1 255 060	904 104	209 103	141 853
2022	1 306 460	919 789	239 725	146 946
2023	1 215 070	857 215	239 115	118 527

EVOLUTION OF VINS DE PROVENCE HARVESTS BY COLOUR (IN HL)



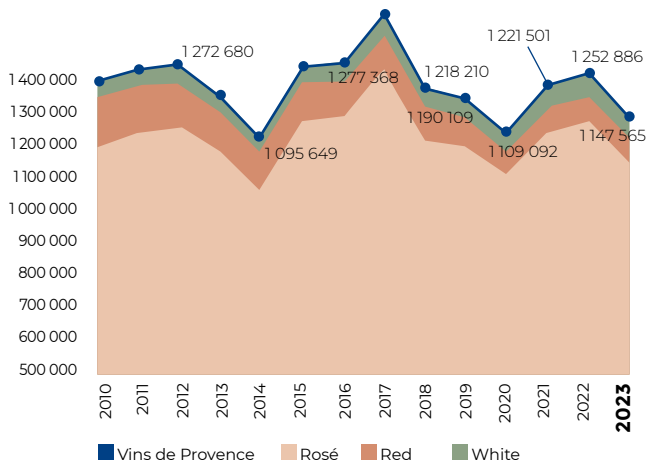
Sources: Harvest declarations / reported figures as per ODOs

2023 RELEASES TO MARKET AND EVOLUTION

HISTORY OF VINS DE PROVENCE RELEASES TO MARKET, BY PDO, ALL COLOURS COMBINED (IN HL)

	VINS DE PROVENCE	CÔTES DE PROVENCE	COTEAUX D'AIX-EN-PROVENCE	COTEAUX VAROIS EN PROVENCE
2010	1 241 853	941 556	187 058	113 239
2011	1 272 959	969 293	185 817	117 849
2012	1 287 786	960 271	196 138	131 377
2013	1 214 764	867 711	221 262	125 791
2014	1 118 140	841 510	171 422	105 207
2015	1 270 632	968 055	188 621	113 956
2016	1 277 368	953 906	199 828	123 634
2017	1 396 257	1 034 280	220 634	141 343
2018	1 218 210	885 607	209 525	123 079
2019	1 190 109	862 090	204 621	123 398
2020	1 109 092	783 839	194 159	131 094
2021	1 221 501	872 274	221 820	127 407
2022	1 252 886	909 475	216 424	126 986
2023	1 147 566	840 421	197 136	110 009

EVOLUTION OF VINS DE PROVENCE RELEASES TO MARKET, BY COLOUR (IN HL)



Sources: Monthly summary declarations, CIVP

STRUCTURE OF VINS DE PROVENCE

STRUCTURE OF THE WINE REGION



COOPERATIVE WINERIES

52 operators

with **34** producing CP wine
12 producing CAP wine
10 producing CVP wine



INDIVIDUAL WINERIES

449 operators

with **327** producing CP wine
65 producing CAP wine
69 producing CVP wine

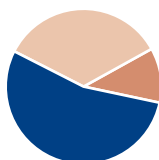


WINE-MAKING MERCHANTS

46 operators

with **38** producing CP wine
3 producing CAP wine
6 producing CVP wine

STRUCTURE OF THE MARKETS



— BOTTLED: **35%**

— GRAPES: **11%**

— BULK: **54%**

	VINS DE PROVENCE	CÔTES DE PROVENCE	COTEAUX D'AIX-EN-PROVENCE	COTEAUX VAROIS EN PROVENCE
Volume of bulk releases	623 677 hl	434 156 hl	110 445 hl	79 076 hl
Volume of bottled releases	393 560 hl	279 786 hl	85 431 hl	28 344 hl
Grapes (as per merchant/ winery SVI2s)	130 366 hl	126 480 hl	1 260 hl	2 626 hl
Total	1 147 603 hl	840 421 hl	197 136 hl	110 046 hl

EVOLUTION OF SALES CHANNELS

All colors					
Food retailers 2010 à 2023		Exports 2010 à 2023		Other (dining, wine merchants) 2010 à 2023	
					
2010	44%	2010	7%	2010	49%
2011	45%	2011	8%	2011	47%
2012	44%	2012	11%	2012	44%
2013	41%	2013	14%	2013	46%
2014	40%	2014	15%	2014	45%
2015	36%	2015	18%	2015	45%
2016	36%	2016	24%	2016	41%
2017	34%	2017	29%	2017	37%
2018	33%	2018	35%	2018	31%
2019	24%	2019	35%	2019	41%
2020	27%	2020	40%	2020	33%
2021	24%	2021	40%	2021	36%
2022	24%	2022	39%	2022	37%
2023	23%	2023	37%	2023	40%

FOOD RETAILERS: 2023 SALES AND EVOLUTION OVER 10 YEARS

FRENCH FOOD RETAILERS	VOLUME (in hl)	VALUE (in € incl. VAT)
Vins de Provence All colors	265 422	247 974 546
Vins de Provence rosés	250 828	231 960 714
Côtes de Provence red	3 804	4 326 717
Coteaux d'Aix-en-Provence red	2 302	2 210 685
Coteaux Varois en Provence red	400	336 744
Côtes de Provence white	3 781	336 759
Coteaux d'Aix-en-Provence white	3 618	3 632 115
Coteaux Varois en Provence white	688	668 812
Côtes de Provence rosés	175 491	173 323 054
Coteaux d'Aix-en-Provence rosés	38 484	29 682 311
Coteaux Varois en Provence rosés	36 852	28 955 349

EVOLUTION OF SALES

Vins de Provence rosés sold by food retailers

459 140 hl

in 2013

250 827 hl

in 2023

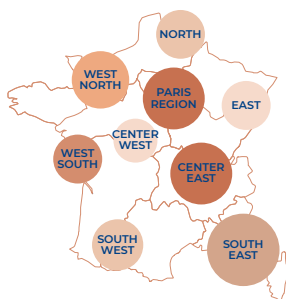
233 678 392 € TTC

in 2013

231 960 713 € TTC

in 2023

BREAKDOWN OF SALES OF VINS DE PROVENCE ROSÉS BY FRENCH FOOD RETAILERS IN 2023, BY REGION



- North 7%
- Paris region
Centre-East 16%
- West-North 11%
- West-South 6%
- Centre-West 5%
East 5%
- South-West 9%
- South-East 25%
- Est 5%

ENVIRONMENTAL LABELS

VINTAGE 2023

VINS DE PROVENCE (3 PDOS)

57% of the surface area of Provence wines is ORGANIC or HVE, i.e. an equivalent of **15 750 ha**.



COOPERATIVE WINERIES

A total of **52** cooperative wineries spanning **13 050 ha** with:

 ORGANIC

32 cooperative wineries on **1 430 ha**

 HIGH ENVIRONMENTAL VALUE (HEV)

47 cooperative wineries on **5 730 ha**



INDIVIDUAL WINERIES

A total of **449** individual wineries spanning **11 881 ha** with:

 ORGANIC

280 individual wineries on **4 882 ha**

 HIGH ENVIRONMENTAL VALUE (HEV)

157 individual wineries on **4 848 ha**



WINE-MAKING MERCHANTS

A total of **46** wine-making merchants spanning **2 930 ha** with:

 ORGANIC

20 wine-making merchants on **354 ha**

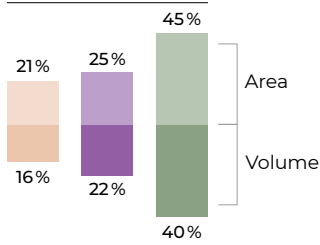
 HIGH ENVIRONMENTAL VALUE (HEV)

8 wine-making merchant **135 ha**

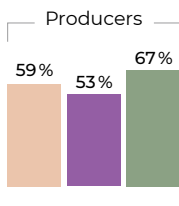


Organic areas and volumes in 2023

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



20% of the total Vins de Provence wine volume is organically cultivated

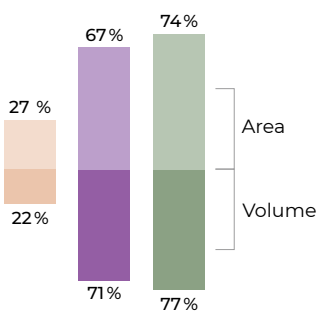


En 2023, **59%** of producers made certified organic Vins de Provence wines

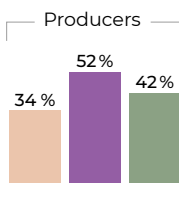


High Environmental Value (HEV)

38% of the wine region by area



37% of total volume



Made by **38%** of producers

■ Côtes de Provence

■ Coteaux d'Aix-en-Provence

■ Coteaux Varois en Provence

EXPORTS SALES

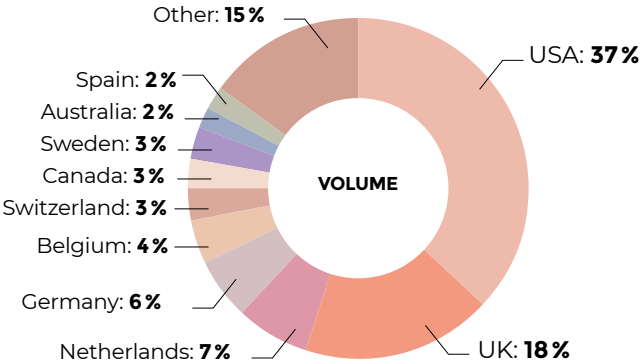
STILL THE TOP COMMERCIAL OUTLET !

Total volume for all countries

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

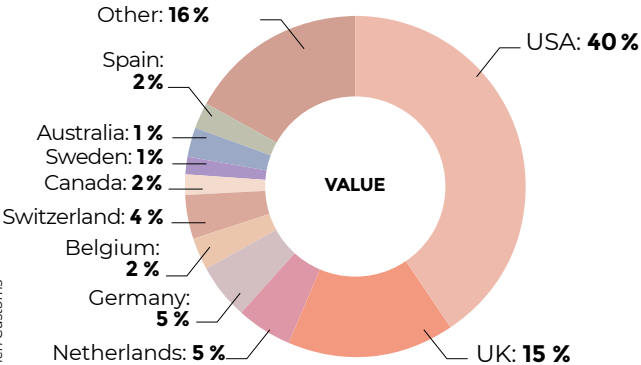
VINS DE PROVENCE WINE EXPORTS RED AND ROSE by volume in 2023

Total exports: 426 705 hl

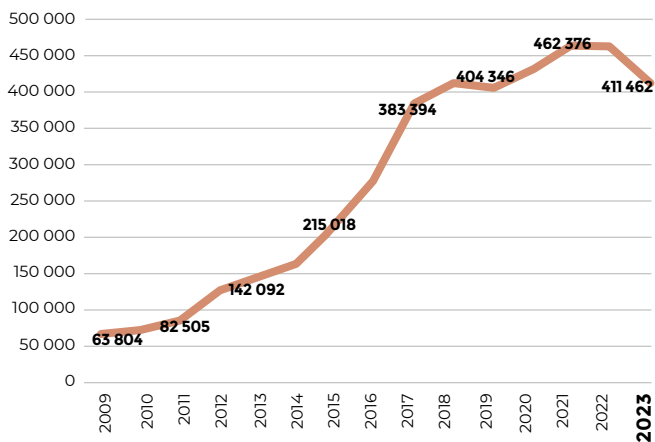


VINS DE PROVENCE WINE EXPORTS RED AND ROSE by value in 2023

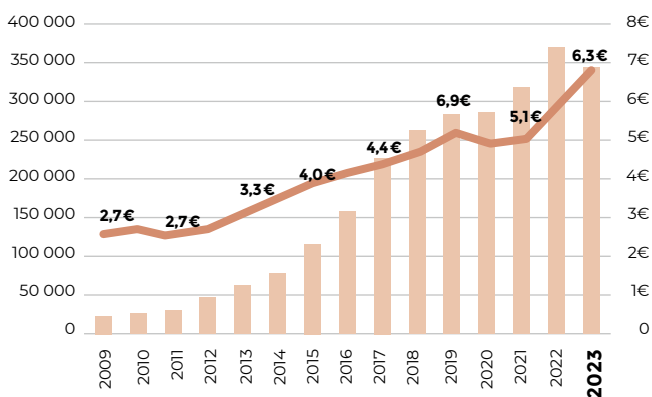
Total exports: 361 282 156 € HT



VINS DE PROVENCE ROSÉ EXPORTS (IN HL)



AVERAGE PRICE PER BOTTLE OF EXPORTED ROSÉ (IN € FOB EX-VAT)



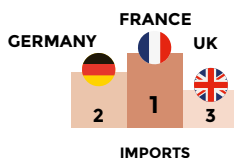
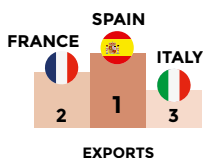
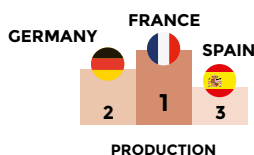
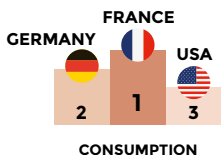
- Export of Vins de Provence Rosé in €
- Average price of a Rosé bottle exported in €

ROSÉ WINES WORLD TRACKING

CONSUMPTION



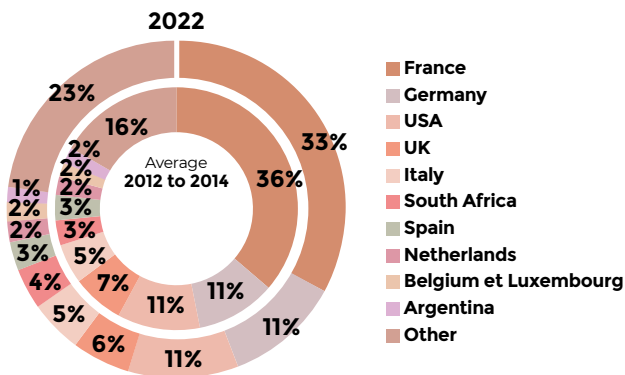
FOUR VOLUME INDICATORS



THE CONSUMPTION

Consumption of rosé in 2022:
between 19,6 and 21 Millions hL

Between 2012 and 2022, **rosé** wines bucked the trend, growing by **2%** while the overall wine category (including all three colors) declined by **11%**. Rosé continues to gain market share, with a notable milestone achieved in 2022: 1 in every 10 bottles of wine consumed worldwide is now a rosé.



France maintains its position as the world's leading consumer of rosé wines, accounting for **36%** of global volumes. While rosé consumption declined in most major markets in 2022, the rate of decline is slowing in France and the United States, but accelerating in Germany and the United Kingdom. Meanwhile, foreign markets outside the top 6 are experiencing accelerated growth, offering a promising counterpoint to the overall trend.

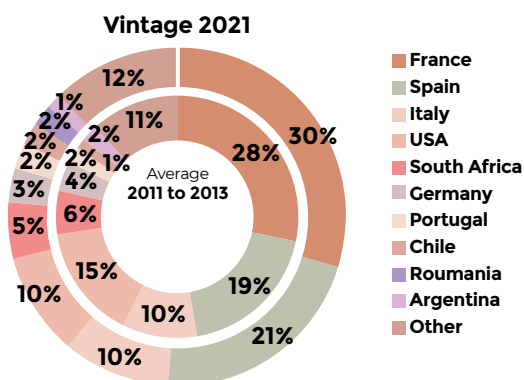
ROSÉ WINES WORLD TRACKING

PRODUCTION

PRODUCTION

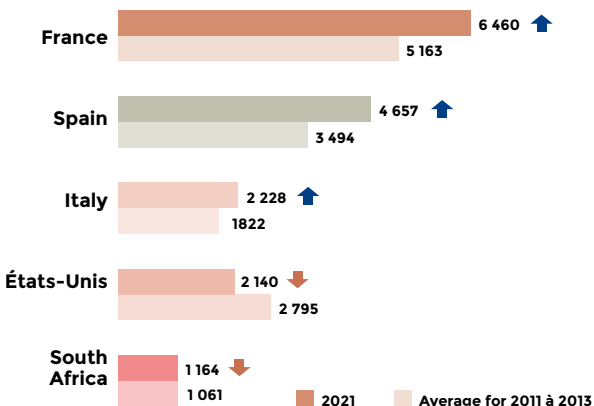
Global production of rosé wines declined again in 2021, reaching 21.8 million hectoliters (-5.3%). This decrease was primarily driven by France, which accounted for a 1.6 million hectoliter decrease in 2021, yet still maintains its dominant position in global production alongside Spain, Italy, and the United States.

These four countries collectively account for 71% of global rosé wine production. Meanwhile, several regions are experiencing growth, including the southern hemisphere (Chile, New Zealand), Eastern Europe (Hungary, Romania, Bulgaria), and Canada.



In the long term, global production of rosé wines is largely driven by two key players: France and Spain.

AVERAGE EVOLUTION 2011/2013-2021



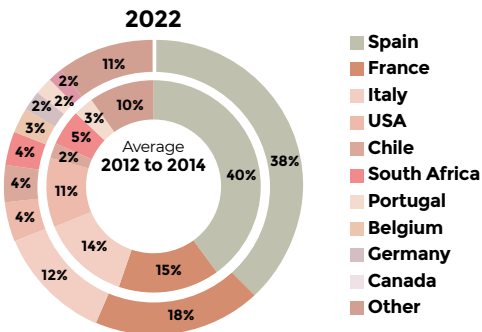
ROSÉ WINES WORLD TRACKING

IMPORTS & EXPORTS

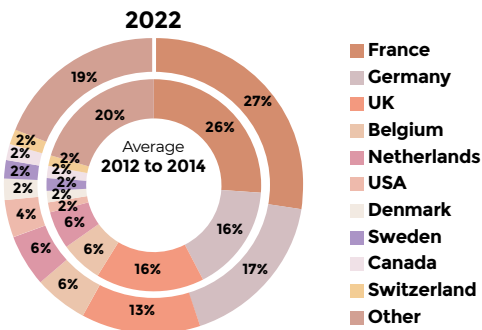


IMPORT/EXPORT FLOW

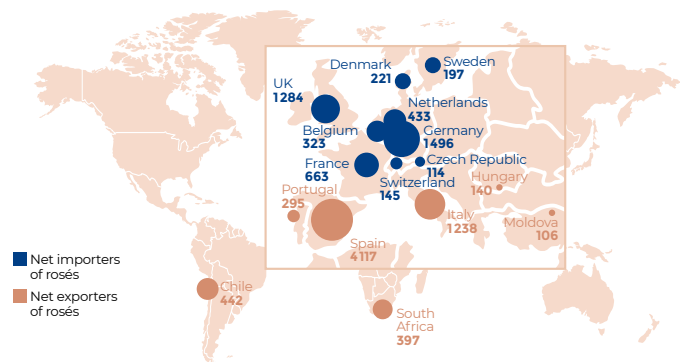
Rosé exports (by volume)



Rosé imports (by volume)



TRADE BALANCE (EXPORT-IMPORT) OF THE MOST DEFICIT OR SURPLUS COUNTRIES IN 2022 (VOLUME IN MILLIONS OF HL)



CALENDAR OF WINE DÉCLARATIONS VITI-VINICOLES

The Economic Analysis Department of CIVP has created a comprehensive calendar of wine declaration due dates, accessible online.

This calendar consolidates all the deadlines for declarations required from producers and merchants, covering submissions to CIVP, French Customs, appellation syndicates, FranceAgriMer, and inspection agencies.

Please note that this calendar is for informational purposes only, and operators should verify the details with the relevant organizations for precise information on each declaration.

calendrier-vitivini.vinsdeprovence.com

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



See your summary
calendar of
wine declarations



LATEST FIGURES FROM THE ECONOMIC ANALYSIS DEPARTMENT

IN A FEW NUMBERS,



50
participants on average
in attendance at each
wine region meeting*



150
countries
tracked



15
countries
tracked in
detail



36
environmental
newsletters published



100
Dashboards published



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

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



VINS DE PROVENCE

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

eco@provencewines.com

ECONOMIC ANALYSIS DEPARTMENT

MAISON DES VINS
RN 7 - CS 50002 __ 83460 LES ARCS SUR ARGENS
0(033) 4 94 99 50 10__CIVP@PROVENCEWINES.COM

Crédits photo : CIVP / Sowine, CIVP / Pauline Chardin

Conception graphique : agence **slaap**