

ITS ARTISANS

Women and men, all of them passionate, young and old, château owners and hipsters, entrepreneurs and career changers, timeless and alternative, collective and independent... together they contribute to a more sustainable and equitable society, innovate, and bring their region to life.

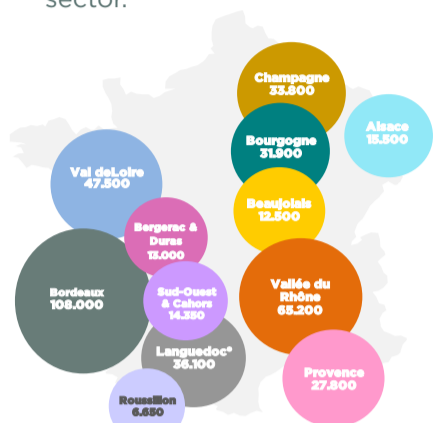
- 5,300 AOP winegrowers (average size of estate: 20 hectares).
- 300 wine merchants who account for more than two-thirds of Bordeaux wine sales worldwide.
- 29 cooperative cellars and 3 unions which represent 39% of AOP growers and 23% of production.
- 60,000 direct and indirect jobs generated by the sector.



ITS APPELLATIONS (AOPs)

Château wines, brands, atypical cuvées, classed growths, etc. Bordeaux covers an exceptional diversity of AOP red, dry white, sweet white, rosé and sparkling wines:

- Barsac • Blaye • Côtes de Bordeaux • Blaye Côtes de Bordeaux • Cadillac Côtes de Bordeaux • Castillon Côtes de Bordeaux • Francs Côtes de Bordeaux • Sainte-Foy Côtes de Bordeaux • Bordeaux • Bordeaux Haut-Benaige • Bordeaux supérieur • Cadillac • Canon Fronsac • Cérons • Côtes de Bordeaux Saint-Macaire • Côtes-de-Bourg / Bourg / • Crémant de Bordeaux • Entre-Deux-Mers • Entre-Deux-Mers Haut-Benaige • Fronsac • Graves • Graves Supérieures • Graves de Vayres • Haut-Médoc • Lalande de Pomerol • Listrac-Médoc • Loupiac • Lussac Saint-Emilion • Margaux • Médoc • Montagne Saint-Emilion • Moulis ou Moulis en Médoc • Pauillac • Pessac-Léognan • Pomerol • Premières Côtes de Bordeaux • Puisseguin Saint-Emilion • Sauternes • Saint-Emilion • Saint-Emilion Grand Cru • Saint-Estèphe • Saint-Georges Saint-Emilion • Saint-Julien • Sainte-Croix-du-Mont •

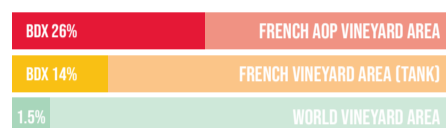


THE FRENCH AOP VINEYARD
2022 AREAS // SOURCES: TRADE ASSOCIATIONS

ITS TERROIR

- 108,000 hectares of AOP vineyard
- 3/4 Gironde farms have vines.
- 65 AOPs (Appellation d'Origine Protégée)

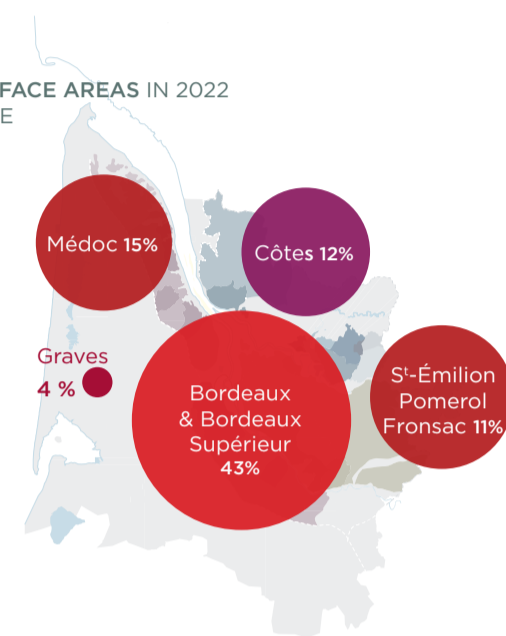
BORDEAUX BY VINEYARD AREA
SOURCES: CUSTOMS, AGRESTE, OIV



BREAKDOWN OF SURFACE AREAS IN 2022 BY PRODUCTION ZONE

SOURCE: CUSTOMS

- RED AOP 85%
- DRY WHITE AOP 8%
- SWEET WHITE AOP 3%
- ROSÉ AOP 3%
- WHITE & ROSÉ CRÉMANT AOP 1%



Essential VINS DE BORDEAUX

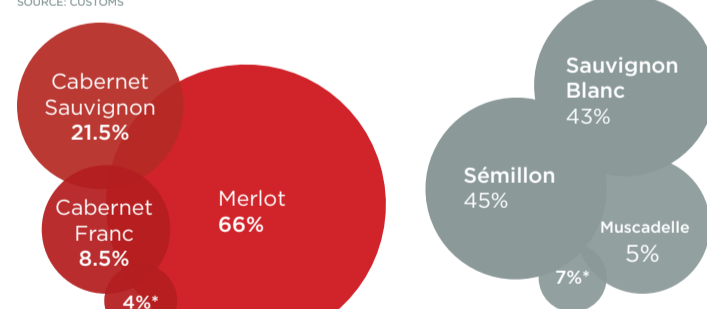


ITS SIGNATURE GRAPE VARIETIES

- blended wines (mix of varieties) or single varieties
- Mix in the vineyard:
 - 89% red varieties
 - 11% white varieties
- Largest Merlot-producing vineyard in the world

BREAKDOWN OF AREAS BY GRAPE VARIETY

SOURCE: CUSTOMS

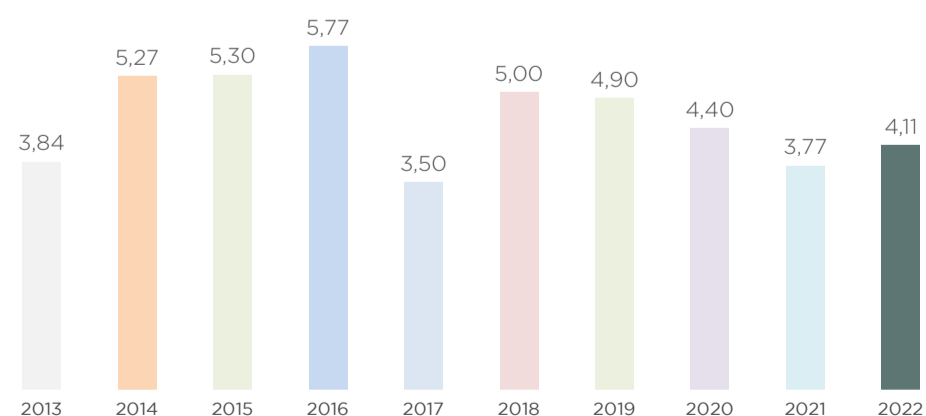


*Other red varieties: Malbec (or Côt), Petit Verdot, Carménère, etc.

*Other white varieties: Sauvignon Gris, Colombar • Ugni Blanc • Merlot Blanc, Mauzac

ITS AOP WINES IN ALL COLOURS AND STYLES

- Each vintage brings a new challenge: the volume of the harvest depends on the weather conditions.
- 4.6 million hectolitres harvested each year on average over the past 10 years



HISTORY OF BORDEAUX WINE HARVESTS IN MILLION HECTOLITRES
SOURCE: CUSTOMS

- 2022 vintage: 4.1 million hectolitres, equivalent to 548 million bottles.

BREAKDOWN OF 2022 PRODUCTION BY COLOUR
SOURCE: CUSTOMS

- 85% RED
- 8% DRY WHITE
- 4% ROSÉ
- 1% SWEET WHITE
- 2% CRÉMANT (WHITE AND ROSÉ)

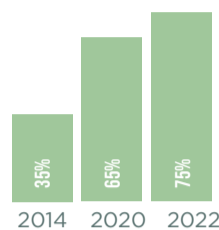


ITS SUSTAINABLE COMMITMENTS AND INITIATIVES



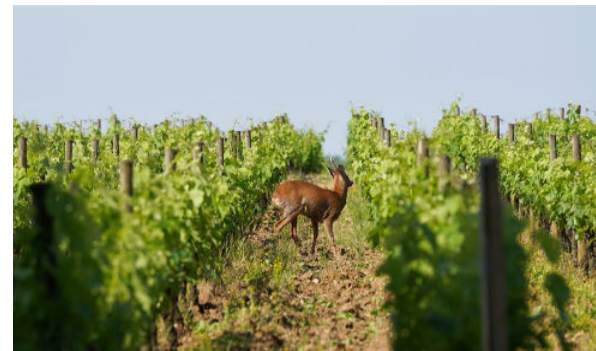
ENVIRONMENT

Bordeaux brings together a diverse range of properties and production and protection methods. Within this diversity, the best-known environmental labels exist side by side. Some properties have several.



CHANGE IN CERTIFICATION IN THE BORDEAUX VINEYARD CIVB ESTIMATE FROM VARIOUS SOURCES

- In 2022, more than **75%** of the Bordeaux vineyard area was certified under an environmental initiative (vs 35% in 2014).
- Nearly 1/4 of the vineyard area is farmed organically (AB) // X 3 in 5 years and +3.5% by area between 2021 and 2022 (SOURCE: AGENCE BIO)



CARBON FOOTPRINT

• 3rd carbon audit of the sector carried out in 2019 = **587,000 tCO₂eq.**, i.e. a 39% reduction in emissions between 2007 and 2019. (SOURCE: CARBONE 4 - 2019 CARBON AUDIT).

• Aligned with the French National Low-Carbon Strategy and the Paris Agreement, the Bordeaux wine sector is committed to a **54% reduction in emissions by 2030 compared with 2007.**

=>Bordeaux wines 2030 Carbon Plan based on 5 priorities:

- Glass and packaging
- Viticultural practices (fuel oil, machinery, inputs)
- Transport
- Energy efficiency of buildings and processes
- Capture, storage and utilisation of CO₂

SOCIAL

Contributing to an attractive sector by:

- listening better to employees' needs in order to attract and retain them;
- taking account of the arduous nature of some tasks and providing training;
- boosting the local job market.

CSR (Corporate Social Responsibility)

56 companies certified in 2022 as part of the collective Bordeaux Cultivons Demain approach, and a hundred more signed up.

SALES IN THE FOUR CORNERS OF THE WORLD

3.98 million hectolitres, i.e. the equivalent of 531 million bottles sold in 2021 - 2022* for a value of €4bn.

SALES CAMPAIGN 01/08/2021 - 31/07/2022 FRANCE + EXPORT - SOURCE: CUSTOMS - CIVB

SALES IN FRANCE

No. 1 destination
2022 SALES REPORT
CIVB ESTIMATE FROM VARIOUS SOURCES

45% LARGE RETAIL
SOURCE: CIRCANA

- Bordeaux remains the No. 1 AOP wine region sold in this channel.
- Bordeaux appellations represent 24% of volume sold and 26% of turnover.
- Average price of a bottle of Bordeaux wine in large retail in 2022: €6 (based on all pack sizes in 75cl bottle equivalents)

• Bordeaux wine sales by colour

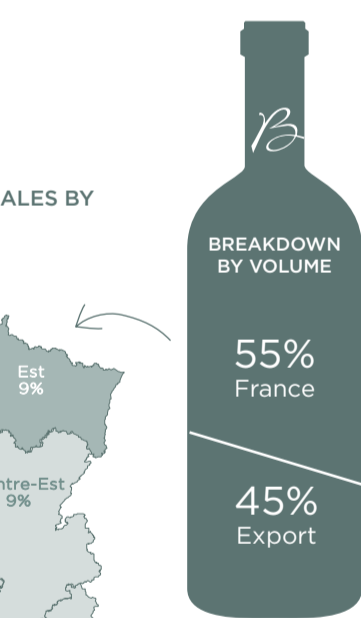


43% ON-TRADE
(restaurants, wine shops, direct sales, etc.)



12% HARD DISCOUNT

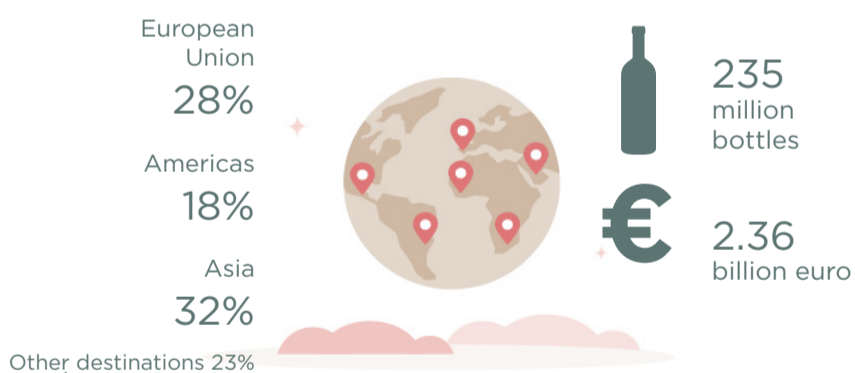
Bordeaux remains the preferred region for the French, whatever the level of consumer knowledge
Sowine/Dynata 2023 barometer



17 bottles of Bordeaux wine sold every second around the world

SALES IN EXPORT MARKETS

2022 EXPORT REPORT - SOURCE: CUSTOMS - CIVB



RANKING OF THE MAIN DESTINATIONS IN 2022 BY VOLUME (in million hectolitres)
* Mainland China + Hong Kong + Macau

• No. 1 French exporter of still AOP wines in volume and in value

• 91% by volume and 97% by value of wine exports for the Nouvelle-Aquitaine region.
SOURCE: CUSTOMS

