

LOIRE VALLEY

THE FRENCH WINE REGION BOASTING HIGH MARKET PERFORMANCE

The Loire Valley is the French wine region that exemplifies diversity. With 51 appellations and 6 IGPs spread over more than 57,000 hectares, it produces wines with characteristics that align with current consumer expectations in France and overseas. Consequently, exports are posting strong growth, increasing by 10,2 % in value and 9,6 % in volume in 2019. The French market is also sending out positive signals with rising market shares in supermarkets and a high presence rate in the hospitality industry. In 2019, 57 % of the French drank Loire Valley wines and 90 % wanted to buy them.

The Loire Valley continues to expand overseas

Accounting for 20 % of Loire Valley wine sales, exports continue to grow, particularly in the three main markets that are the United States, the United Kingdom and Germany (Infographic 1). In 2019, exports grew by 9,6% in volume and 10,2% in value (Infographic 2). The United States once again posted the strongest growth for Loire Valley wines abroad this year, with sales exceeding the €100 million mark (€102.1 million).

The Loire Valley strengthens its positions abroad

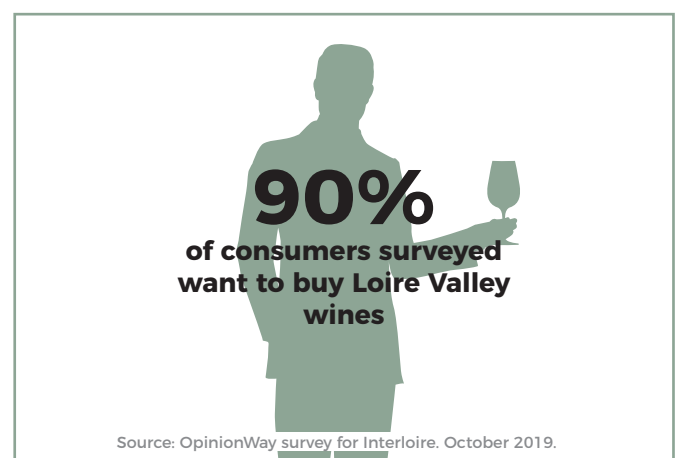
In France, Loire Valley wines are gaining market share in super/hypermarkets (Infographic 6). Their growth has allowed them to rank among the leading French wine regions (15% of still AOPs and 30 % of quality sparkling wines, excluding Champagne) and to become the leading region by market share (Infographic 7) for white wines (26% of market share by volume) and rosés (29% of market share by volume). The Loire Valley also has a strong presence in the hospitality industry, with 75% of restaurants listing its AOPs. For white, red and sparkling wines, the region ranks alongside appellations with the strongest presence, with Bordeaux, Burgundy and Champagne (Infographic 8).

Wines that resonate with consumer expectations according to OpinionWay

Both in France and abroad, the Loire Valley's success is due to the profile of its wines that aligns with consumer expectations, as evidenced by two awareness surveys conducted by OpinionWay*. For French consumers and foreign trade members, Loire Valley wines are perceived as easy-drinking quality wines. The extensive range of Loire Valley wines along with their image as wines for sharing (Infographic 10) prompt 90% of French consumers to want to buy them. According to OpinionWay, 93% consider Loire Valley wines as "matching today's lifestyles".

This perception of the quality of Loire Valley wines is coupled with a good understanding of the appellations by foreign trade members, particularly Sancerre, Muscadet, Vouvray and Chinon, and of the grape varieties: Sauvignon, Cabernet Franc and Chenin. This leads them to believe that Loire Valley wines will continue to develop (Infographic 5), particularly in the major foreign markets (United States, United Kingdom, Germany, etc.).

*Sources: OpinionWay survey for InterLoire involving 1,024 French wine consumers aged 18 and over, a representative sample based on the quota method of gender, age, profession and region criteria, from 11 to 22 October, and involving 121 international wine trade members in November 2019 (Belgium, United Kingdom, United States, Germany).

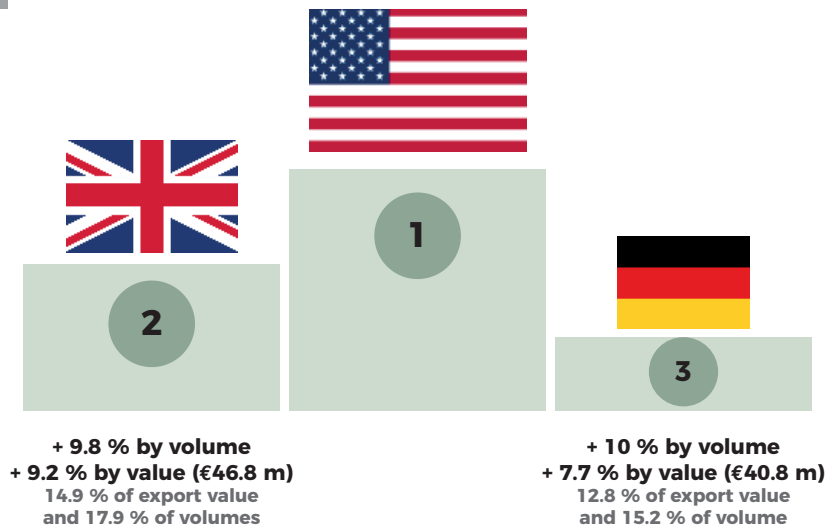


LOIRE VALLEY WINES ARE DEVELOPING THEIR LEADING EXPORT MARKETS

infographic n°1

Loire Valley wines are growing in their main markets

+14.1 % by volume
+15.6 % by value (€102.1M)
32.4 % of export value and 25.4 % of volumes



Source: InterLoire, Customs. At the end of December 2019.

Exports : 20 % of Loire Valley wine sales

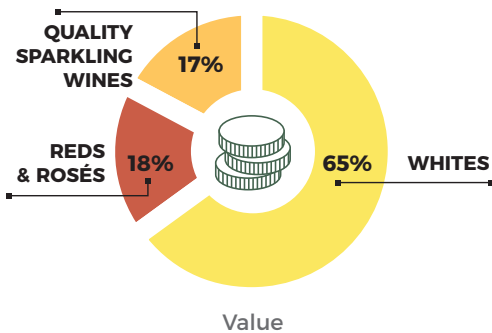
infographic n°2



Source: InterLoire, Customs. Trends over the last twelve months (to the end of December 2019)

infographic n°3

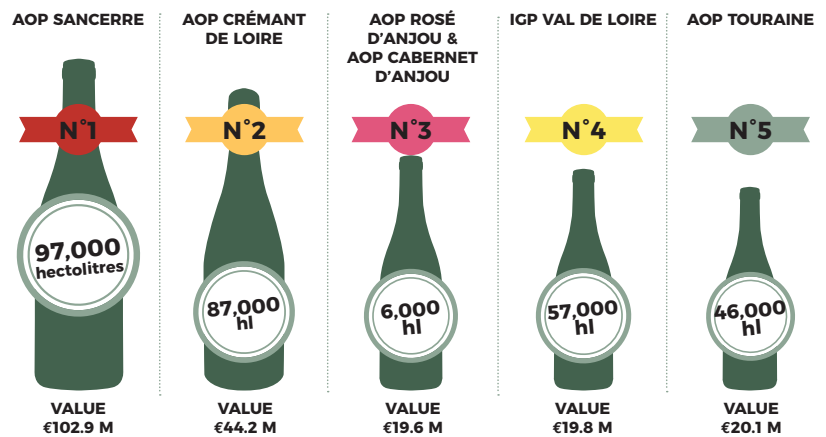
White wines account for the vast majority of exports



Source: Interloire, Customs. At the end of October 2019

The Top 5 most exported wines by volume

infographic n°4

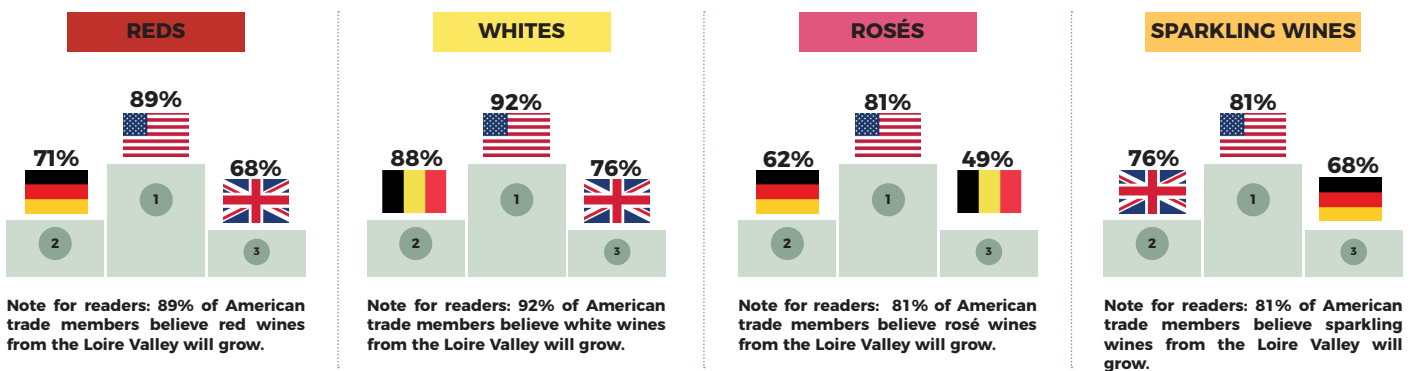


Source: InterLoire, Customs. At the end of October 2019.

infographic n°5

Positive prospects for Loire Valley wines in export markets in the future

ACCORDING TO TRADE MEMBERS SURVEYED BY OPINIONWAY, LOIRE VALLEY WINES ARE SET TO GROW IN EXPORT MARKETS, SPEARHEADED BY THE UNITED STATES.



Source: OpinionWay survey for Interloire

LOIRE VALLEY WINES ARE GAINING SIGNIFICANT TRACTION IN FRANCE

infographic n°6

In super/hypermarkets, the Loire Valley is making headway



15.1%

The market share by volume of Loire Valley AOPs in the still wine category. 30 % in the quality sparkling wine category (excluding Champagne)



+2.7 AOP

still wine listings per store in 2019

Source: InterLoire, IRI. Year-on-year change at the end of October 2019.

infographic n°7

A wine region that is gaining market shares in super/hypermarkets

IN SUPER/HYPERMARKETS, THE REGION LEADS THE WAY FOR WHITE AND ROSÉ WINES. REDS AND QUALITY SPARKLING WINES ARE GAINING MARKET SHARE.

WHITES



26% of AOP volumes
22% of AOP values

ROSÉS



29% of AOP volumes
25% of AOP values

REDS



5% of AOP volumes
6% of AOP values

QUALITY SPARKLING WINES



30% of AOP volumes
28% of AOP values (excluding Champagne)

Source: InterLoire, IRI, OpinionWay. Over a year at the end of October 2019.

infographic n°8

The diversity of Loire Valley wines is an asset that places them in prime position in the hospitality industry (NB: cafés, hotels, restaurants)

PRESENCE RATE FOR RED WINES



64%

1st. Bordeaux: 78 %
2nd. Rhône Valley: 78 %
3rd. Loire Valley: 64 %

Loire Valley growth

+4 POINTS
since 2016

PRESENCE RATE FOR DRY WHITE WINES



60%

1st. Burgundy: 67%
2nd. Loire Valley: 60%
3rd. Rhône Valley: 36%

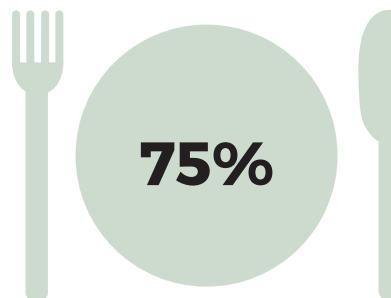
Loire Valley growth

+3 POINTS
since 2016

Source: Symetris 2019

infographic n°9

In France, 75% of restaurants list Loire Valley AOPs



+3 POINTS
since 2016

Source: Symetris 2019

infographic n°10

Wines with characteristics and qualities that appeal to consumers

FOR FRENCH CONSUMERS, LOIRE VALLEY WINES ARE PRIMARILY:



THE WINES CONJURE UP:

- WARMTH and SHARING (95%)
- CULTURAL DIVERSITY (95%)
- A QUALITY wine region and wines (93%)
- EASY to drink (94%)
- EXTENSIVE choice (93%)

The range and quality of Loire Valley wines are their strong point in the French market, both in super/hypermarkets and restaurants, because 93% of respondents said that they "match current lifestyles".

Source: OpinionWay survey for InterLoire (october 2019)

KEY FACTS AND FIGURES FOR THE LOIRE VALLEY

Source: InterLoire, INAO, BIVC, Customs, FRCVVL



3,700
declared producers



340
trading firms



21
co-operative wineries



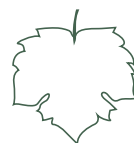
1.3 billion
euros in revenue



A wine region listed as a
UNESCO WORLD HERITAGE SITE



51 appellations
6 IGP

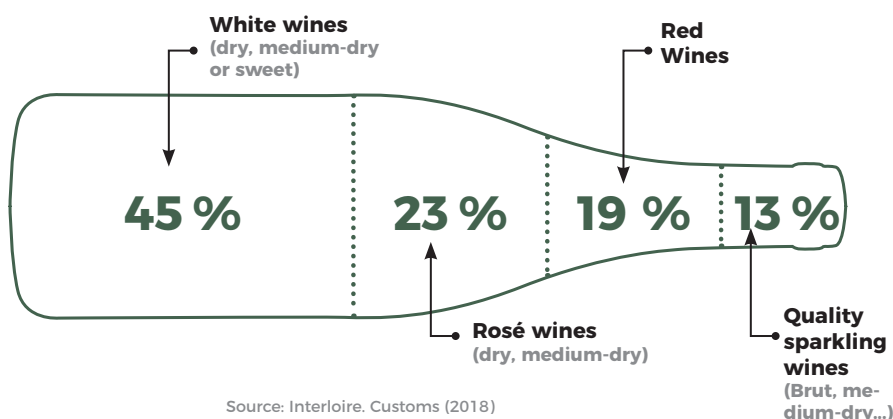


57,400
hectares under vine

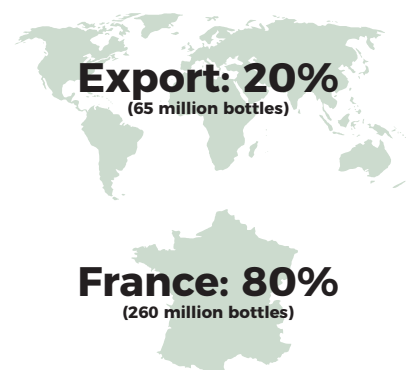


325 M
bottles of AOP/IGP
marketed in 2018

A mosaic of colours and styles for still and sparkling wines



Export-France shares



VAL DE LOIRE x PARIS
wine-friendly city guide



UN CITY GUIDE POUR ASSEoir À PARIS LA PLACE DU VAL DE LOIRE A CITY GUIDE TO SECURE THE LOIRE VALLEY'S RIGHTFUL PLACE IN PARIS

Interloire has published a city guide to coincide with Wine Paris featuring venues where Loire Valley wines can be tasted in the city. Loire Valley x Paris contains a selection of 54 restaurants, wine bars and wine merchants, chosen by Parisian chefs, sommeliers and wine merchants with a weak spot for the Loire Valley. By sharing their personal favourites, they paint an overall picture where the eclectic choices mirror the ability of Loire Valley wines to feature in every category of the hospitality industry. This is a response to Parisians, who rank the Loire Valley first among regions they discover (and introduce to others) in restaurants, according to an OpinionWay survey carried out for Wine Paris.

Loire Valley x Paris is distributed at Wine Paris and can also be downloaded from the Loire Valley wine website: www.vinsvaldeloire.fr

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