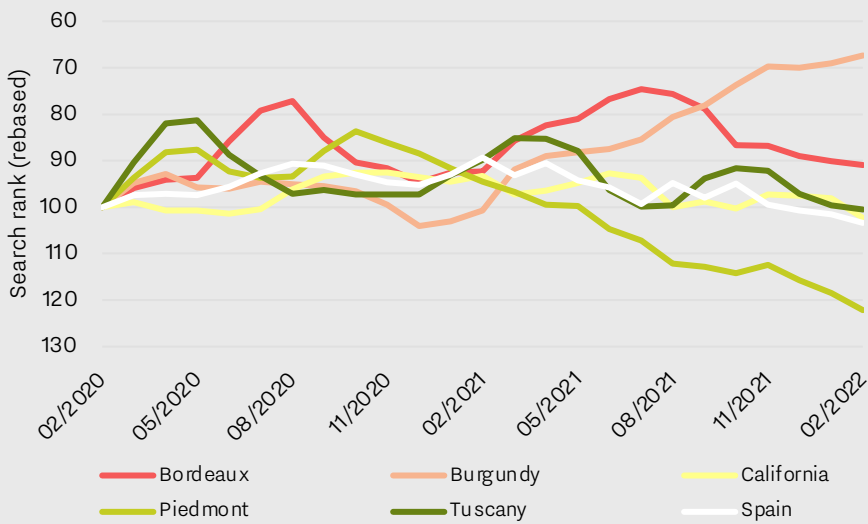


In collaboration with Wine-Searcher, Part I of Wine Lister’s annual Bordeaux Study analyses the recent performance of the region and draws upon our latest trade survey findings to offer early insight into this year’s en primeur campaign. It reveals industry opinion on what will encourage 2021 en primeur success, and explores which wines have seen the greatest increase in trade confidence over the past year.

Read more: www.wine-lister.com/analysis

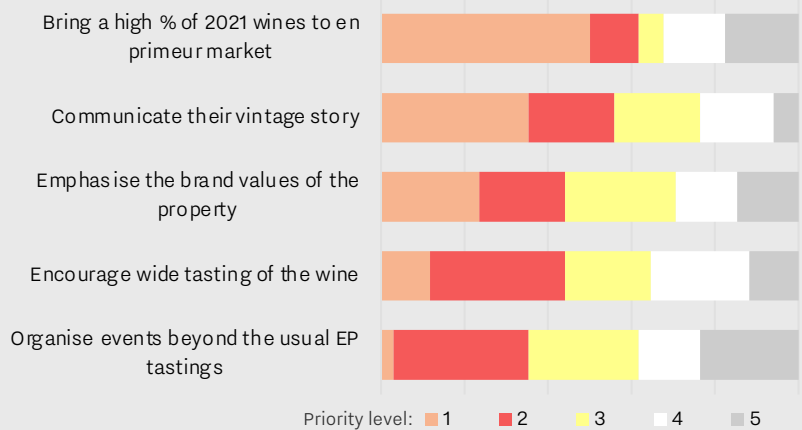
Two-year popularity progression by region



According to Wine-Searcher’s average search rank of the top 20 wines per region, Bordeaux’s popularity has risen over the past two years (despite fluctuations between en primeur campaigns). Bordeaux’s popularity progression is outperformed by Burgundy, whilst California, Tuscany, and Spain have seen levels return to that observed two years ago. Amongst all the winemaking regions measured, only Piedmont sees a notable decline.

Our survey of 47 leading trade respondents offers suggestions to châteaux in priority order for en primeur success. Half of respondents evoke the need to bring a high proportion of total 2021 production to the en primeur market as number one, while a third believe clear communication of the vintage story is most important. A further eight respondents feel highlighting broader brand values will provide the greatest returns.

Priority châteaux actions for increased campaign success



Top confidence increases by wine

- 1.9 La Gaffelière
- 1.6 Clos du Marquis
- 1.6 Durfort-Vivens
- 1.5 Pavie
- 1.2 Du Tertre
- 1.2 Canon-la-Gaffelière
- 1.2 Prieuré-Lichine
- 1.1 D’Armailhac

Trade confidence in Bordeaux has turned a corner over the past year, with over three-quarters of the wines surveyed receiving an increase in trade confidence ratings (on a scale of 0-10) since 2021. The top eight wines with the greatest increase in confidence differ entirely from those topping the list in last year’s study, with La Gaffelière witnessing the greatest growth - up nearly two points on its 2021 confidence rating, and 0.9 points higher than the leading wine from last year’s ranking, Troplong-Mondot. Clos du Marquis, Durfort-Vivens, and Pavie also excel, gaining approximately a point and a half each to take second, third, and fourth place respectively.