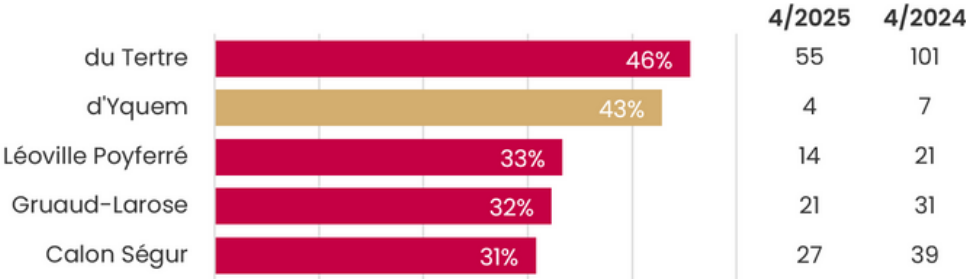


BORDEAUX 2025 – PART II: WAITING FOR A MIRACLE | KEY FINDINGS

Bordeaux’s 2024 en primeur campaign has come to a close. We are pleased to announce the publication of Part II of Wine Lister’s annual in-depth Bordeaux study. Now that critics’ scores are out, we take a deep-dive into 2024 quality, before looking at release prices and other metrics such as search popularity and auction data over the past 12 months.

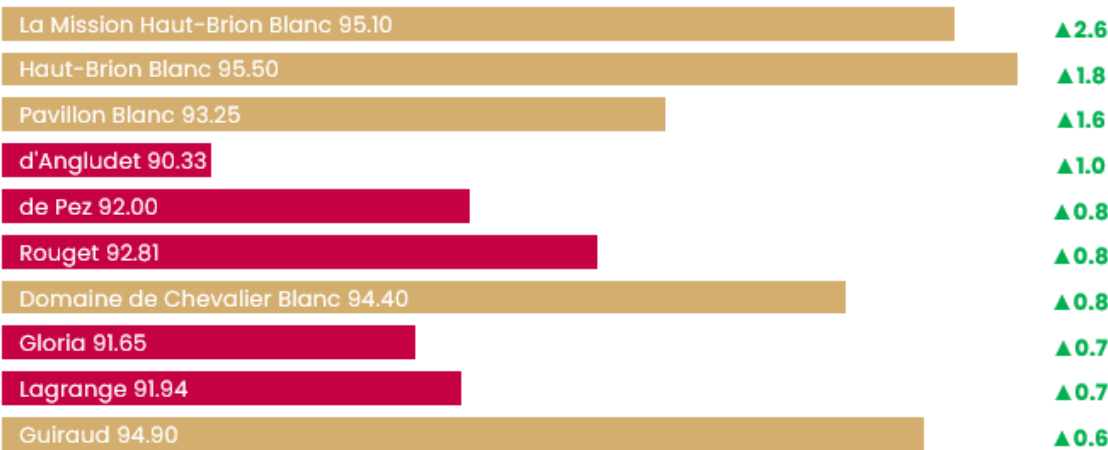
TOP FIVE SEARCH RANK MOVERS



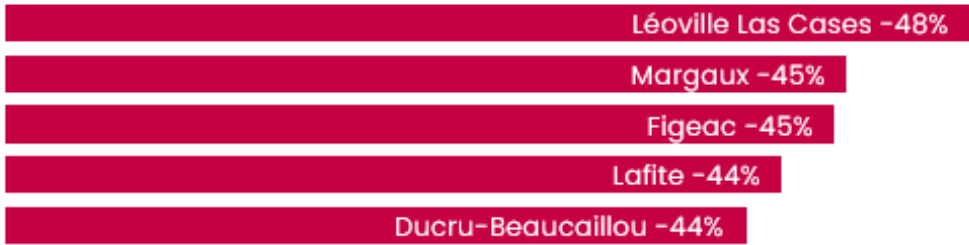
We measure wine popularity using monthly searches on the world’s most popular wine site, Wine-Searcher. The graph above shows the percentage increase in search rank for the top five movers between April 2024 and April 2025.

- Du Tertre sees the largest year-on-year increase in searches, gaining 46 places and seeing a 46% increase in search rank
- D’Yquem has moved up three places since last year to enter the top five most-searched for Bordeaux wines
- White wines continue their growth this year, taking eight of the top 20 spots, compared to just one last year (d’Yquem)

TOP 10 CRITICS’ SCORE INCREASES



TOP FIVE HIGHEST RELEASE PRICE DISCOUNTS (£)



Here we compare 2024 release prices to the three-month average market prices of the previous 10 vintages, providing an alternative benchmark for consumers assessing the value of the vintage.

- Of the 105 wines released this year, the average discount on their mean market price is -30%
- Léoville Las Cases stands out with the greatest discount at -48%
- The list is headed by juggernaut brands, including three first growths – Margaux, Lafite, and Mouton – in the top 10

We look at the evolution of average critics’ scores within a sample of 134 Bordeaux wines. Just 20 wines in the study recorded an increase in critics’ scores – the top-10 are shown in the graph on the left.

- The 2024 vintage was a strong year for white wines: they occupy all three of the top positions and make up five entries on the top-10 list
- D’Angludet saw the greatest increase in average critics’ score of all red wines, of one whole point
- The top-rising red wines among the entire top 20 score risers are dominated by lower-priced wines – between £20 and £77 – highlighting strong performance in 2024 from Bordeaux’s challenger wines, including those from lesser-known appellations and without classifications