

Rhone Valley AOC wine region
key figures 2013



INTER RHÔNE
INTERPROFESSION DES VINS A.O.C.
CÔTES DU RHÔNE & VALLÉE DU RHÔNE

Rhône Valley AOC wines within their production area

Source : Inter-Rhône 2013

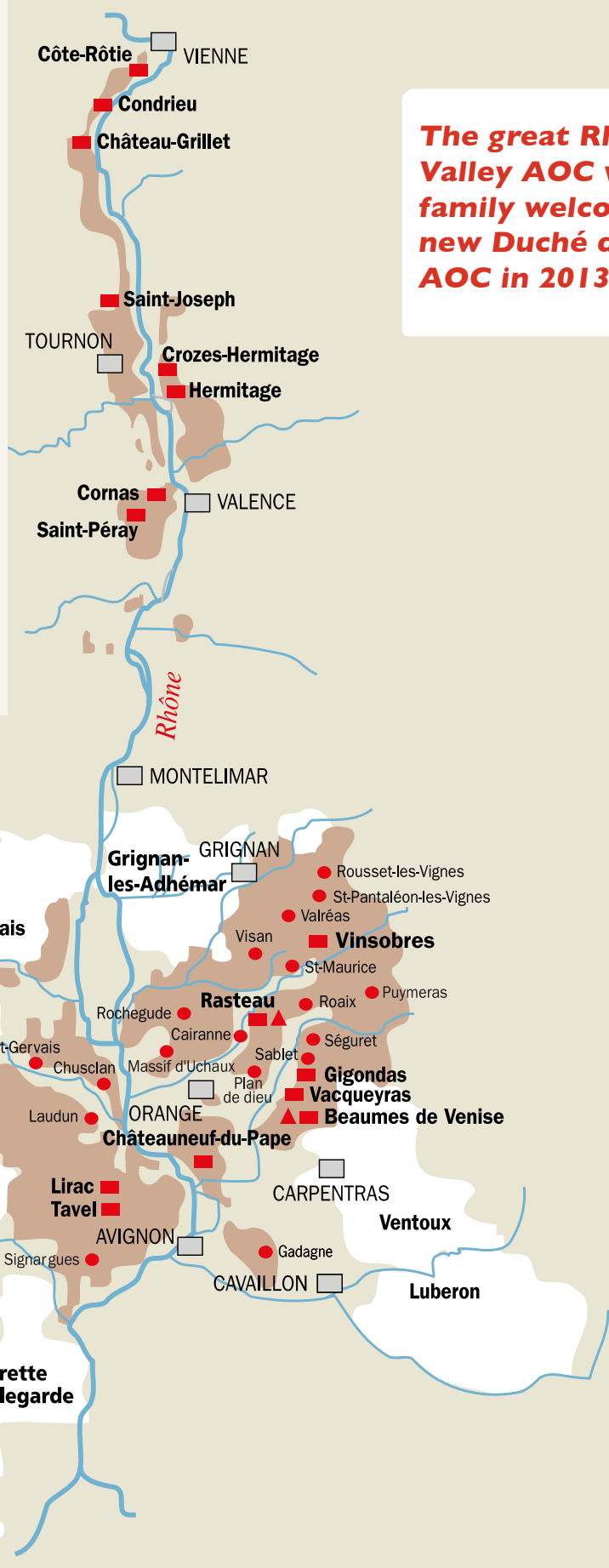
- Aire d'Appellation des Côtes du Rhône**
 Produits sur 171 communes dans 6 départements / 171 villages in total for the Côtes du Rhône production area.

- Les 18 Côtes du Rhône Villages avec nom géographique**
 95 communes de production pour les Côtes du Rhône Villages avec ou sans nom géographique.
The 18 Côtes du Rhône Villages bearing a geographic name
 95 Villages in total for the Côtes du Rhône Villages appellation with and without a geographic name.

- Les 16 Crus des Côtes du Rhône**
The 16 Crus of the Rhône Valley

- Les 2 VDN Vins Doux Naturels**
2 VDN Vins Doux Naturels (Sweet Wines)

- Les autres appellations de la Vallée du Rhône**
The other appellations of the Rhône Valley
 Clairette de Bellegarde, Costières de Nîmes, Côtes du Vivarais, Duché d'Uzès, Grignan-les-Adhémar, Luberon, Ventoux.



The great Rhône Valley AOC wine family welcomed the new Duché d'Uzès AOC in 2013!

Rhône Valley AOC wines within their production area

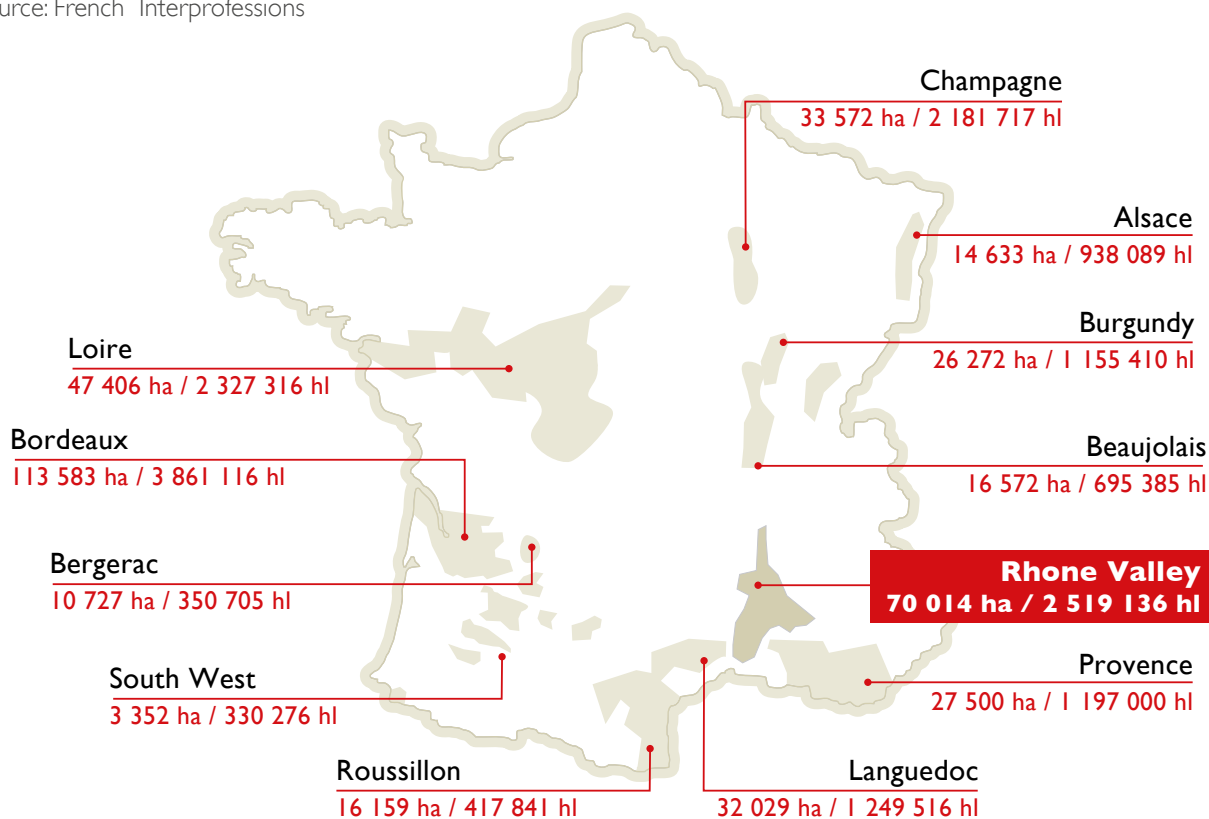
Source : Harvest declarations - statement declarations - DAI/DS

The Rhône Valley: the 2nd largest French AOC wine area

Rhône Valley AOC wines: 5,500 wine producers who are passionate about their work; vineyards extending over 3 regions, 6 «departments», covering an area equivalent to 100,000 football pitches and producing enough wine to fill 100 olympic-size swimming pools

The Rhône Valley wine region in France

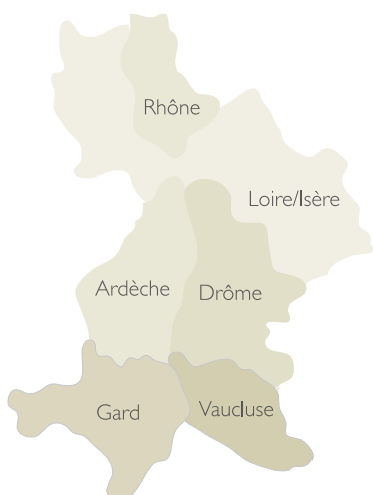
Source: French Interprofessions



The Rhône Valley wine region breakdown by “department”

Source: French Customs, agricultural census 2010

The wine sector is the top employer in the Rhône Valley with 46,000 direct or indirect jobs



Department	Number of wine growing businesses	Rhône Valley AOC production in 2013 (hl)	Rhône Valley surface area in 2013 (ha)	Share of RV AOCs within the department's agricultural production area	Share of RV AOCs within the department's viticultural production area
Vaucluse	2 821	1 181 939	26 106	23,5%	55,6%
Gard	1 504	776 968	28 031	17,5%	53,3%
Drôme	638	426 708	12 098	5,9%	73,6%
Ardèche	232	105 164	2 944	2,3%	27,6%
Rhône/Loire/Isère	123	17 754	553	0,1%	2,9%

Production of Rhône Valley

AOC wines in 2013

Sources: Harvest declarations - statement declarations

The 2013 vintage, variable in volume, generous in quality

5 300 wine growing businesses
2,5 millions d'hl
70 014 ha

79 % Red
15 % Rosé
6 % White

Producers Unions' data 2013	Production areas	Production volume	Average yield obtained	Red	Rosés	White
	(ha)	(hl)	(hl/ha)	%	%	%
Rhône Valley total	70 014	2 519 136	-	79%	15%	6%
Côtes du Rhône total	54 611	1 900 535	-	88%	7%	5%
Regional Côtes du Rhône	31 926	1 205 746	38	89%	7%	4%
Côtes du Rhône Villages	9 201	301 119	33	96%	1%	3%
<i>Without district name</i>	3 380	116 253	34	-	-	-
<i>With district name</i>	5 822	184 866	32	-	-	-
Total CDR crus	13 484	393 670	-	82%	10%	9%
Beaumes de Venise	629	17 290	27	100%	0%	0%
Chateauneuf du Pape	3 161	81 732	26	94%	4%	6%
Château-Grillet	4	14	4	0%	0%	100%
Condrieu	168	4 899	29	0%	0%	100%
Comas	131	3 965	30	100%	0%	0%
Côte-Rôtie	276	8 884	32	100%	0%	0%
Crozes-Hermitage	1 514	59 581	39	92%	0%	8%
Gigondas	1 216	29 704	24	99%	0%	1%
Hermitage	136	3 640	27	76%	0%	24%
Lirac	782	20 347	26	85%	6%	9%
Rasteau	938	26 824	29	100%	0%	0%
St-Joseph	1 211	40 046	33	91%	0%	9%
St-Péray	73	1 857	25	0%	0%	100%
Tavel	902	33 731	37	0%	100%	0%
Vacqueyras	1 406	38 212	27	95%	1%	3%
VDN Muscat de Beaumes de Venise	472	10 131	20	1%	6%	94%
VDN Rasteau	25	420	17	69%	26%	5%
Vinsobres	441	12 393	28	100%	0%	0%
Total other AOCs	15 403	618 601	-	50%	40%	10%
Clairette de Bellegarde	16	327	21	0%	0%	100%
Costières de Nîmes	4 193	192 926	46	51%	41%	8%
Côtes du Vivarais	321	12 061	38	53%	41%	6%
Duché d'Uzes	282	10 602	38	62%	19%	19%
Grignan les Adhémar	1 361	36 537	27	66%	23%	11%
Luberon	3 317	139 848	42	26%	53%	21%
Ventoux	5913	226 300	38	60%	36%	4%

Production of Rhône Valley

AOC wines in 2013

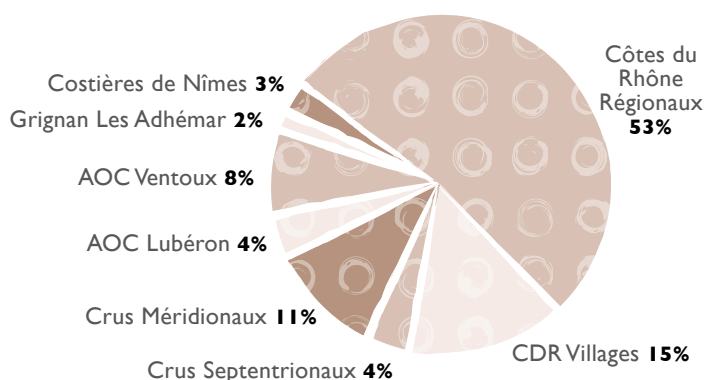
Sources: IR Survey, Millésime Bio, Harvest Declarations

Progression in Rhône Valley AOC harvests

Producers Unions' data 2013	2011 (in hl)	2012 (in hl)	2013 (in hl)	Prog 2013/2012 (in hl)	Prog 2013/2012 (in %)
Rhône Valley total	3 086 743	2 870 191	2 519 136	-351 055	-12%
Côtes du Rhône total	2 385 278	2 202 264	1 900 535	-301 730	-14%
Côtes du Rhône Régional	1 614 731	1 440 253	1 205 746	-234 507	-16%
Côtes du Rhône Villages	291 337	314 472	301 119	-13 353	-4%
Without district name	103 192	112 842	116 253	3 411	3%
With district name	188 145	201 694	184 866	-16 828	-8%
Total CDR cru	479 210	447 539	393 670	-53 870	-12%
Beaumes de Venise	21 046	20 784	17 290	-3 494	-17%
Chateaufort du Pape	103 333	92 609	81 732	-10 877	-12%
Château-Grillet	55	30	14	-16	-54%
Condrieu	6 205	6 265	4 899	-1 366	-22%
Cornas	4 455	4 218	3 965	-253	-6%
Côte-Rôtie	10 510	9 972	8 884	-1 088	-11%
Crozes-Hermitage	69 961	66 150	59 581	-6 569	-10%
Gigondas	40 525	37 015	29 704	-7 311	-20%
Hermitage	5 099	4 434	3 640	-794	-18%
Lirac	23 912	22 988	20 347	-2 641	-11%
Rasteau	32 332	30 299	26 824	-3 476	-11%
St-Joseph	45 303	42 120	40 046	-2 074	-5%
St-Péray	2 963	2 686	1 857	-829	-31%
Tavel	39 016	36 397	33 731	-2 666	-7%
Vacqueyras	49 005	44 656	38 212	-6 444	-14%
VDN Muscat de Beaumes de Venise	10 862	10 501	10 131	-370	-4%
VDN Rasteau	1 421	1 143	420	-723	-63%
Vinsobres	13 207	15 271	12 393	-2 878	-19%
Total others AOCs	701 465	667 927	618 601	-49 326	-7%
Clairette de Bellegarde	270	270	327	57	21%
Costières de Nîmes	199 243	190 090	192 926	2 836	1%
Côtes du Vivarais	9 996	13 492	12 061	-1 431	-11%
Duché d'Uzes	-	-	10 602	10 602	0%
Grignan les Adhémar	62 226	51 959	36 537	-15 422	-30%
Luberon	152 066	153 365	139 848	-13 517	-9%
Ventoux	277 664	258 751	226 300	-32 451	-13%

Focus on Rhône Valley organic AOC wine production

In 2013, Rhône Valley organic AOCs represented 11% of the total vineyard surface area.



In 2013 it is estimated that Rhône Valley certified organic AOC wines covered over 7,400 ha, and produced 225,000 hl

Stocks of Rhône Valley

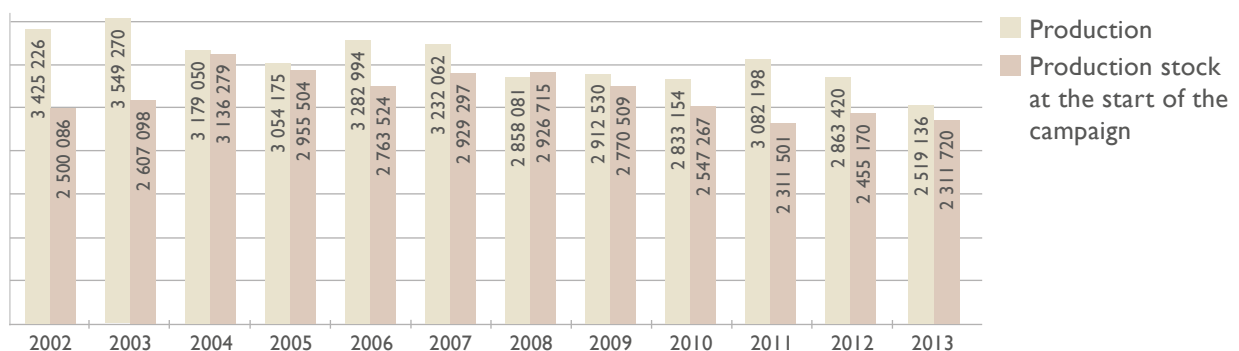
AOC wines

Sources: DAI/DS - IR survey

	2011		2012		2013	
	Production Stock (hl)	Négoce stock (hl)	Production Stock (hl)	Négoce stock (hl)	Production stock (hl)	Négoce stock (hl)
Rhône Valley total	2 311 501	921 314	2 473 234	887 574	2 311 720	906 815
Côtes du Rhône total	1 862 705	791 544	2 001 610	764 326	1 875 121	785 706
Regional Côtes du Rhône	946 289	515 389	1 080 209	468 992	964 709	486 043
Côtes du Rhône Villages	343 153	75 758	310 848	78 019	319 788	85 476
Total CDR Crus	573 263	200 397	610 553	217 315	590 624	214 187
Beaumes de Venise	26 923	2 972	25 303	2 593	23 849	4 209
Chateauneuf du Pape	152 763	44 243	167 410	43 274	158 311	42 579
Château-Grillet	201,98	0	0	0	0	0
Condrieu	3 271	3 447	3 242	4 726	3 486	5 289
Comas	6 958	3 675	6 736	4 604	6 674	4 729
Côte-Rôtie	11 865	16 876	12 137	17 462	12 448	17 474
Crozes-Hermitage	88 338	46 796	89 362	51 277	82 997	48 173
Gigondas	48 245	21 527	49 024	20 346	47 610	18 650
Hermitage	6 773	11 889	6 929	12 508	6 997	12 225
Lirac	29 318	2 975	32 631	2 598	33 289	3 091
Rasteau	26 030	2 000	39 249	7 967	39 192	5 395
Saint Joseph	60 783	17 607	60 722	23 553	57 471	24 179
Saint Péray	2 920	672	2 637	1 349	2 425	1 533
Tavel	13 798	7 495	15 939	6 977	13 708	7 011
Vacqueyras	48 863	15 199	51 218	15 347	53 455	15 906
VDN Muscat de Beaumes de Venise	22 206	505	24 033	496	24 425	556
VDN Rasteau	3 176	232	3 385	11	3 540	239
Vinsobres	20 832	2 287	20 596	2 227	20 747	2 949
Total other AOCs	448 796	129 770	471 624	123 248	436 599	121 109
Clairette de Bellegarde	488	0	341	0	127	0
Costières de Nîmes	141 424	31 293	142 964	25 735	124 846	30 448
Côtes du Vivarais	11 747	435	12 161	203	13 566	25
Grignan les Adhémar	45 823	11 428	63 263	9 203	59 712	10 274
AOC Luberon	87 013	37 497	94 672	34 992	95 069	32 470
AOC Ventoux	162 301	49 117	158 223	53 115	143 279	47 892

Progression in Rhône Valley AOC wine production/stocks balance

Sources: Harvest declarations - Statement declarations - DAI/DS



Rhône Valley AOCs

cellar despatches

Source: DRM, SV12, DREV, Inter Rhône 2013

**400 million
bottles of
Rhône Valley
AOC wines sold
around the world
in 2012/2013**

Types of entity selling Rhône Valley AOC wines in 2012/2013

	Private Wineries	Cooperative Wineries	Trading companies (négoce)/ Producers Unions/ Winemaking entities
Côtes du Rhône (Regionaux - Villages - Crus)	1 279	64	176
Costières de Nîmes - Clairette de Bellegarde	79	12	54
Grignan les Adhémar	33	8	25
AOC Ventoux	140	15	60
AOC Luberon	54	10	28
Côtes du Vivarais	16	3	4

Bulk/bottle sales breakdown for Rhône Valley AOC wines in 2012/2013 (in hl)

	Bulk	Packaged	Vinifications	Other despatches	Total cellar despatches
TOTAL Rhône Valley AOCs	1 971 606	895 383	87 106	45 796	2 999 891
TOTAL Côtes du Rhône	1 536 971	672 070	81 323	36 663	2 327 027
Regional Côtes du Rhône	1 217 971	311 376	38 584	21 568	1 589 499
Côtes du Rhône Villages	161 908	107 129	5 943	8 446	283 426
Without district name	101 159	30 236	3 467	5 609	140 471
With district name	60 749	76 893	2 476	2 837	142 955
Beaumes de Venise	3 793	16 691	142	612	21 238
Chateauneuf du Pape	50 854	50 854	-	-	101 708
Château-Grillet	-	-	-	-	-
Condrieu	985	2 071	2 819	111	5 986
Comas	730	2 331	1 017	85	4 163
Côte-Rôtie	1 430	4 209	3 822	160	9 621
Crozes-Hermitage	19 055	38 289	10 470	392	68 206
Gigondas	16 828	18 846	2 957	710	39 341
Hermitage	703	1 340	2 105	45	4 193
Lirac	5 834	11 648	31	534	18 047
Rasteau	12 539	16 970	109	325	29 943
Saint Joseph	10 859	23 888	8 238	462	43 447
Saint Péray	197	1 513	981	40	2 731
Tavel	15 210	21 970	786	851	38 817
Vacqueyras	11 932	27 120	2 617	1 265	42 934
VDN Muscat de Beaumes de Venise	262	9 252	-	754	10 268
VDN Rasteau	1	969	-	36	1 006
Vinsobres	5 880	5 604	702	267	12 453
Total Other AOCs	434 635	223 313	5 783	9 133	672 864
Clairette de Bellegarde	123	357	-	2	482
Costières de Nîmes	126 109	76 194	-	2 039	204 342
Côtes du Vivarais	6 495	4 731	-	255	11 481
Grignan les Adhémar	22 005	18 008	-	571	40 584
AOC Luberon	113 865	31 700	-	1 391	146 956
AOC Ventoux	166 038	92 323	5 783	4 875	269 019

Progression of Rhône Valley

AOCs cellar despatches

Source : DRM - Inter Rhône 2013

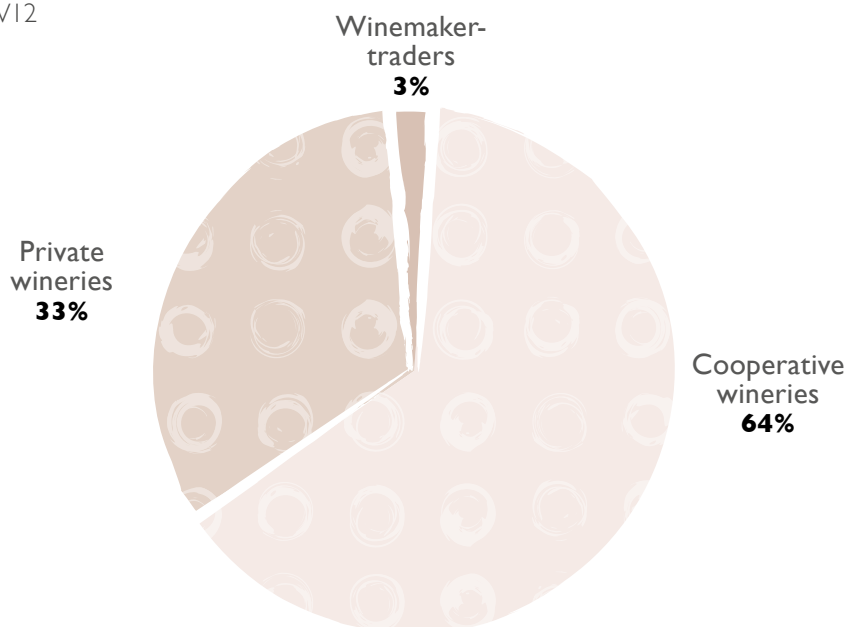
En hl	2007 2008	2008 2009	2009 2010	2010 2011	2011 2012	2012 2013
TOTAL Rhône Valley AOCs *	3 149 897	2 991 433	3 097 268	3 029 269	2 922 333	2 999 891
TOTAL Côtes du Rhône	2 501 751	2 284 138	2 390 857	2 338 815	2 251 300	2 327 027
Regional Côtes du Rhône	1 773 995	1 613 234	1 694 367	1 609 909	1 517 145	1 589 499
Côtes du Rhône Villages	298 165	287 453	299 726	313 400	297 997	283 426
Without district name	148 486	137 678	143 041	151 596	149 236	140 471
With district name	149 679	149 775	156 685	161 804	148 760	142 955
TOTAL Crus	429 591	383 451	396 764	415 506	436 158	454 102
Beaumes de Venise	20 142	19 205	19 697	23 328	22 850	21 238
Chateauneuf du Pape	105 728	84 041	83 348	91 637	88 644	101 708
Château-Grillet	127	68	53	44	50	0
Condrieu	5 006	4 311	4 947	5 796	6 326	5 986
Cornas	3 452	3 691	3 938	3 648	4 290	4 163
Côte-Rôtie	8 974	8 267	9 414	9 108	10 036	9 621
Crozes-Hermitage	62 034	51 115	60 567	65 466	67 634	68 206
Gigondas	45 574	36 276	39 853	39 606	39 706	39 341
Hermitage	4 556	3 580	3 951	3 911	4 286	4 193
Lirac	17 496	18 759	19 850	17 662	17 757	18 047
Rasteau	-	-	-	4 785	19 561	29 943
Saint Joseph	40 827	41 059	39 880	39 663	45 432	43 447
Saint Péray	2 438	2 457	2 457	2 486	3 008	2 731
Tavel	36 413	36 848	39 388	38 939	36 934	38 817
Vacqueyras	51 834	49 126	45 278	45 568	46 425	42 934
VDN Muscat de Beaumes de Venise	12 123	11 590	11 839	12 234	10 596	10 268
VDN Rasteau	1 452	1 414	1 273	1 286	1 101	1 006
Vinsobres	11 415	11 644	11 031	10 339	11 522	12 453
Total others AOCs	648 146	707 295	706 411	690 454	671 033	672 864
Clairette de Bellegarde	-	449	402	439	444	482
Costières de Nîmes	197 348	209 680	218 907	213 756	197 544	204 342
Côtes du Vivarais	13 097	16 573	13 968	12 263	11 633	11 481
Grignan les Adhémar	55 536	54 449	51 022	45 165	39 371	40 584
AOC Luberon	123 478	140 854	134 194	150 462	140 687	146 956
AOC Ventoux	258 687	285 290	287 918	268 369	281 354	269 019

Source: INTER-Rhône 2013. * Hors replis et déclassement

Distribution of Rhône Valley AOC wines

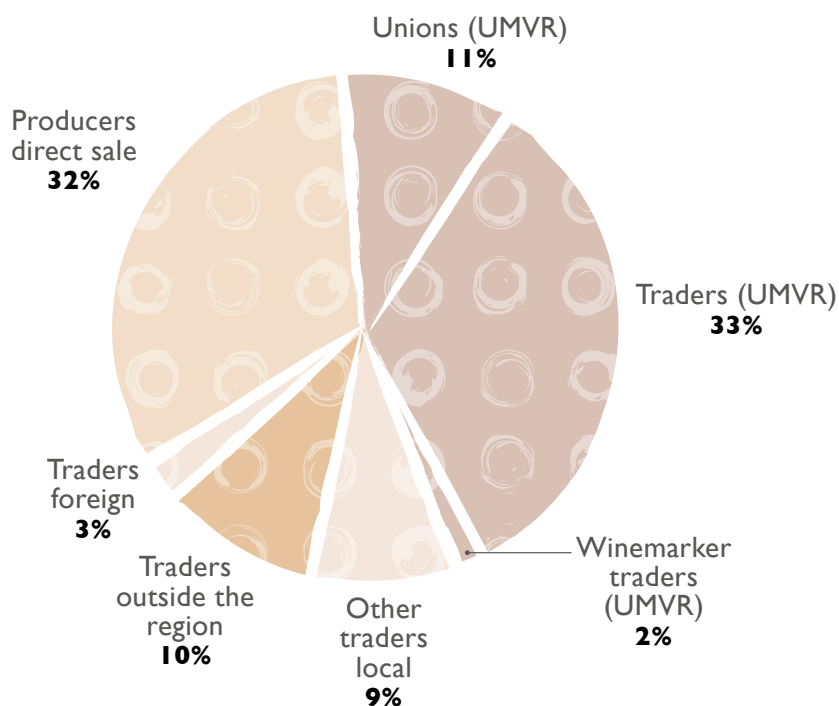
Breakdown of Rhône Valley AOC wine cellar despatches by production entity type

Source: DRM - DREV, SV12



Breakdown of Rhône Valley AOC wine sales by sales entity type

Source: DRM - Interprofession's bulk contracts - DREV - SV12

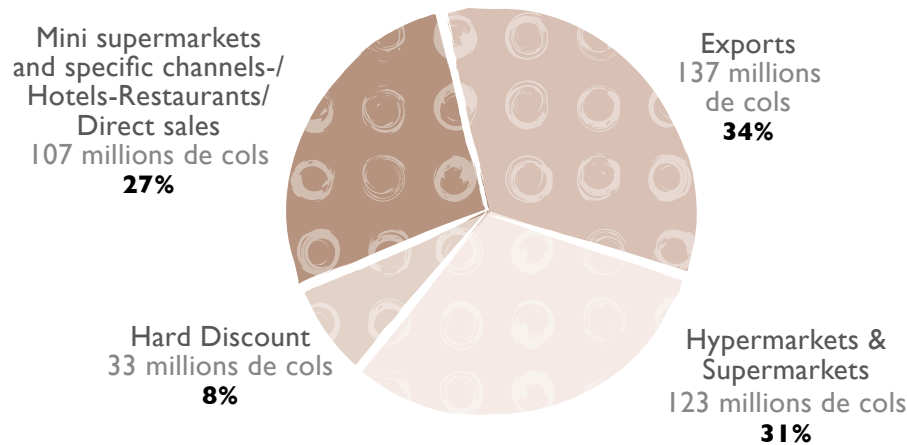


Sales of Rhône Valley AOC wines by distribution channel

Every 13 seconds, a bottle of Rhône Valley AOC wine is enjoyed somewhere in the world!

Breakdown of Rhône Valley AOC wine sales by distribution channel in 2013

Source: Inter Rhône estimates 2013 - in volume (hl)



Estimated breakdown of Rhône Valley AOC wine commercial flows

Source: Inter-Rhône commercial flows research in volume (hl)

Estimate of sales breakdown by distribution channel (% of total sales)

	Supermarkets/ HD	Specialist wine stores	Wholesalers/ On Trade	Direct sale	Export	Source
Côtes du Rhône Villages with district name	49%	4%	9%	14%	24%	IR Flow research 2009
Beaumes de Venise	40%	2%	23%	9%	26%	IR Flow research 2009
Condrieu	3%	15%	31%	25%	26%	IR Flow research 2009
Comas	9%	13%	23%	27%	28%	IR Flow research 2009
Côte-Rôtie	6%	20%	20%	25%	29%	IR Flow research 2009
Crozes-Hermitage	26%	10%	19%	10%	35%	IR Flow research 2009
Gigondas	25%	4%	14%	17%	40%	IR Flow research 2010
Hermitage	12%	10%	25%	23%	30%	IR Flow research 2009
Lirac	9%	6%	12%	16%	57%	IR Flow research 2011
Rasteau	49%	1%	7%	7%	36%	IR Flow research 2009
Saint Joseph	26%	15%	22%	25%	12%	IR Flow research 2009
Saint Péray	32%	5%	15%	39%	9%	IR Flow research 2009
Tavel	50%	3%	18%	5%	24%	IR Flow research 2009
Vacqueyras	19%	4%	20%	13%	44%	IR Flow research 2011
Vinsobres	19%	11%	11%	17%	42%	IR Flow research 2009
VDN Muscat de Beaumes de Venise	54%	1%	7%	21%	17%	IR Flow research 2012
AOC Luberon	39%	6%	9%	11%	35%	IR Flow research 2009
Costières de Nîmes	57%	4%	6%	10%	23%	IR Flow research 2009
Grignan les Adhémar	35%	8%	17%	26%	14%	IR Flow research 2011
AOC Ventoux	40%	3%	8%	14%	35%	IR Flow research 2010

Analysis of the sales and the position of Rhône Valley AOC wines in the French market

Analysis of Rhône Valley AOC wine sales in Hyper/Supermarkets in France

Source: Symphony IRI distributor panel - in volume

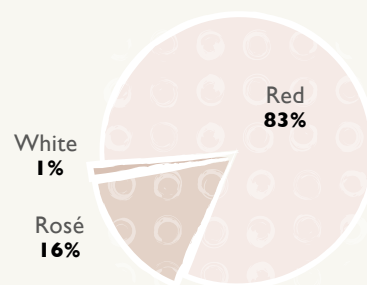
Rhône Valley AOC wines returned to growth in hyper/supermarkets in 2013 (with a sales increase of 3.9% by volume and 8.9% by value), despite depressed economic conditions (-0.2% for AOC wines).

This progression was seen on red, white and rosé:

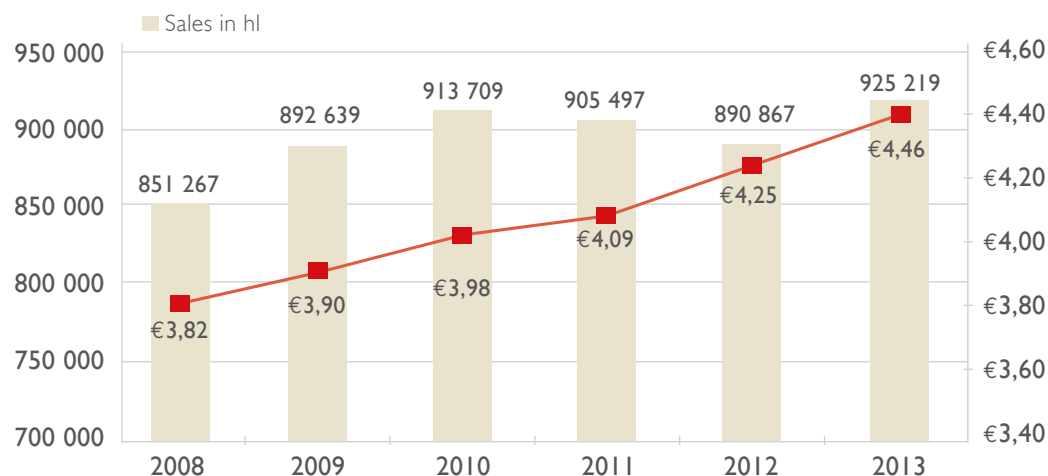
- +2.4% for red wine, with higher growth from Côtes du Rhône villages (+5.3% by volume), Crozes Hermitage (+13%), Rasteau (+15.4%) and Lirac (+14.3%).
- +11.6% for rosé wine, with good performances from the regional Côtes du Rhône (+14.9%), Ventoux (+9.5%), Luberon (+19.3%) and Costières de Nîmes (+15.9%).
- +10.5% for white wine.

In tandem with the growth of volume in French hyper/supermarkets, the Côtes du Rhône AOCs continue to improve in value. The average selling price of red Côtes du Rhône brands in bottle (40% of sales in red) has broken through the €3/bottle barrier for the first time.

Breakdown of Rhône Valley AOC wine sales in French hyper/supermarkets



Progression of Rhône Valley AOC wine sales in French hyper/supermarkets (in hl and €/L, source: IRI panel, Inter Rhône)



Analysis of Rhône Valley AOC wine sales in the On Trade (Cafés - Hotels - Restaurants)

Source: Expert-CNIV On Trade research 2013

Rhône Valley wines are listed in 69% of restaurants. It is the 2nd biggest wine region for red wine and the third biggest for rosé. On average, there are 6 Rhône wine references per establishment.

Rhône Valley wines are listed in 99% of restaurants in the Rhône Alpes region, 93% in the PACA region and 75% in Paris.

Growth in sales of Rhône Valley wines by the glass

Since 2011, we have seen growth in the consumption of wine by the glass: in 2013, 97% of establishments served wine by the glass, with a constant increase in demand (+20% versus the previous year). The Rhône Valley has fully benefited from this drinking trend as 84% of wine bars offer Rhône wines, making the Rhône the top wine region in this type of establishment.

Exports of Rhône Valley AOC wines: we hit the million!

2013 was a landmark year for Rhône Valley AOC wine exports, exceeding the 1 million hl barrier for the first time (source: French Customs).

Exports showed good growth by volume (+5% compared to 2012) and by value with nearly €459 million generated (+8.1%)

Breakdown of Rhône Valley AOC wine exports by volume

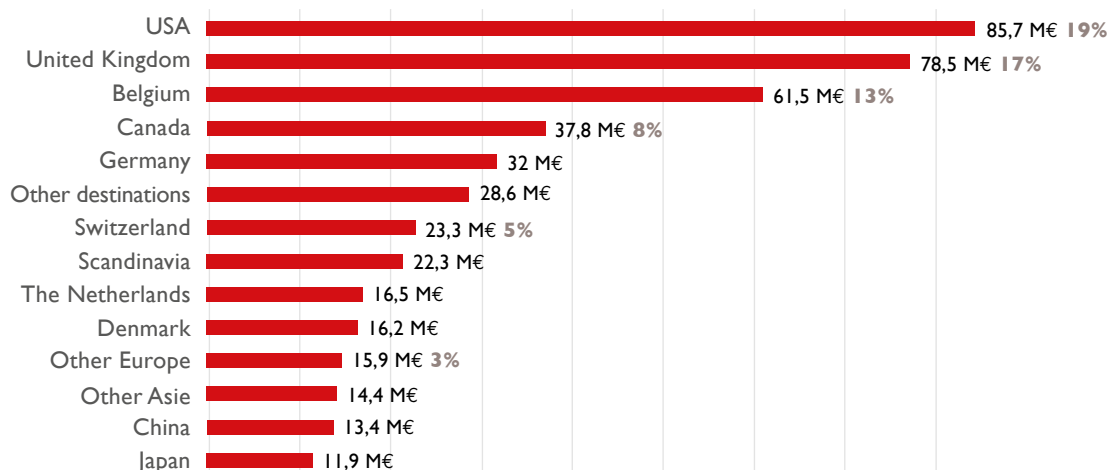
Source: French Customs/ Inter Rhône estimates

In hl	Côtes du Rhône Red/ Rosé 2013 (reg, vill, crus)	Côtes du Rhône White 2013 (reg, vill, crus)	Other Rhône Valley Red/ Rosé 2013	Other Rhône Valley Whites 2013	TOTAL Rhône Valley 2013	Split by %
Belgium-Luxembourg	165 131	4 666	30 447	2 933	203 177	20%
United Kingdom	161 661	8 365	13 730	4 442	188 199	18%
Germany	58 371	1 161	21 054	794	81 380	8%
Switzerland	49 370	621	4 185	65	54 241	5%
The Netherlands	43 919	1 377	6 986	1 860	54 143	5%
Denmark	35 969	487	5 684	275	42 414	4%
Scandinavian countries	49 561	938	3 332	370	54 201	5%
Other Europe	27 989	2 367	4 442	856	35 655	3%
USA	93 779	9 197	30 098	12 663	145 736	14%
Canada	37 070	3 055	13 228	3 248	56 602	6%
China	17 488	700	11 650	329	30 168	3%
Japan	11 994	2 205	4 081	2 027	20 308	2%
Other Asia	8 613	1 135	5 132	231	15 111	2%
Other destinations	42 029	1 593	4 911	566	49 100	5%
TOTAL	802 945	37 867	158 962	30 661	1 030 434	100%

Classement des exportations de la Vallée du Rhône en valeur en K€

Source : Douanes Françaises / Estimations Inter Rhône

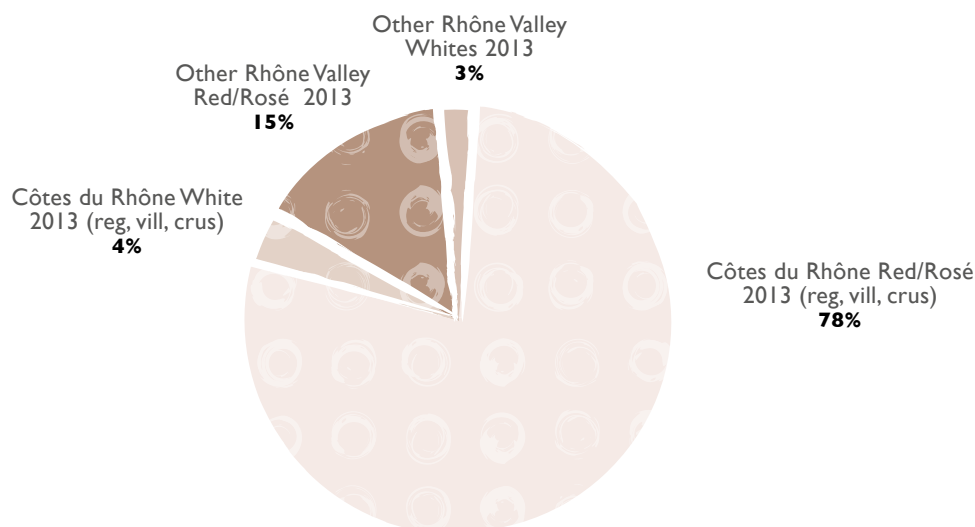
In 2013, Rhône Valley AOC wine exports generated a turnover of €459 million



Estimated breakdown of Rhône Valley AOC wine exports

Source : Inter-Rhône commercial flows research - French Customs stats - in volume

En 2013 les Côtes du Rhône régionaux, villages et crus représentent 82% des exportations



Estimated breakdown of exports (In % of Export volume)

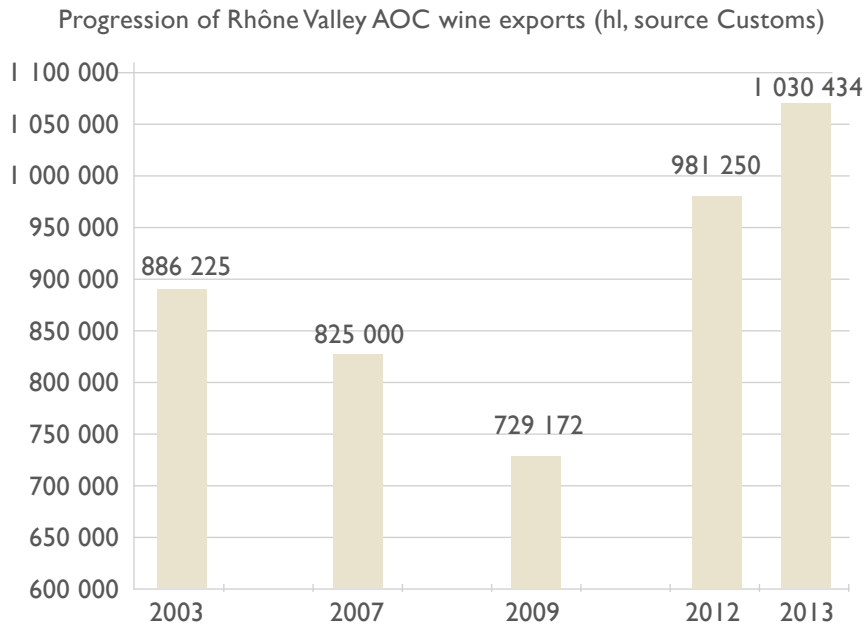
	United Kingdom	Belgium/Luxembourg	Germany	Switzerland	The Netherlands	Denmark/Scandinavia	USA	Canada	Asia	Others	Source
Regional Côtes du Rhône	21%	17%	9%	7%	5%	11%	13%	4%	6%	7%	Douanes 2013
Côtes du Rhône Villages	30%	11%	4%	4%	6%	14%	12%	6%	6%	7%	Douanes 2013
Beaumes de Venise	14%	58%	1%	2%	2%	11%	3%	6%	1%	2%	Et Flux IR 2009
Condrieu	21%	13%	7%	6%	5%	10%	15%	3%	13%	7%	Et Flux IR 2009
Comas	23%	9%	4%	6%	3%	16%	23%	4%	7%	5%	Et Flux IR 2009
Côte-Rôtie	19%	10%	7%	8%	3%	13%	15%	8%	11%	6%	Et Flux IR 2009
Crozes-Hermitage	35%	5%	2%	5%	9%	27%	6%	2%	4%	5%	Et Flux IR 2009
Gigondas	16%	12%	6%	18%	6%	14%	17%	4%	4%	3%	Et Flux IR 2010
Hermitage	32%	5%	4%	5%	1%	9%	12%	3%	9%	20%	Et Flux IR 2009
Lirac	9%	22%	7%	3%	6%	33%	12%	4%	3%	1%	Et Flux IR 2011
Rasteau	9%	8%	12%	9%	0%	12%	5%	40%	0%	5%	Et Flux IR 2009
Saint Joseph	31%	25%	2%	5%	8%	1%	12%	8%	3%	5%	Et Flux IR 2009
Saint Péray	12%	11%	2%	1%	1%	7%	15%	15%	24%	12%	Et Flux IR 2009
Tavel	1%	37%	7%	2%	8%	13%	17%	9%	2%	4%	Et Flux IR 2011
Vacqueyras	6%	44%	7%	4%	8%	8%	16%	4%	2%	1%	Et Flux IR 2010
VDN Muscat de Beaumes de Venise	25%	24%	0%	7%	20%	6%	5%	4%	3%	6%	Et Flux IR 2009
Vinsobres	38%	15%	4%	1%	2%	1%	9%	28%	1%	1%	Et Flux IR 2011
AOC Luberon	6%	25%	22%	0%	3%	5%	22%	7%	5%	5%	Douanes 2013
Costières de Nîmes	18%	8%	8%	3%	11%	7%	12%	6%	20%	7%	Douanes 2013
Grignan les Adhémar	4%	23%	26%	3%	8%	12%	7%	4%	11%	2%	Douanes 2013
AOC Ventoux	8%	19%	7%	3%	2%	4%	32%	13%	6%	6%	Douanes 2013

Progression of Rhône Valley

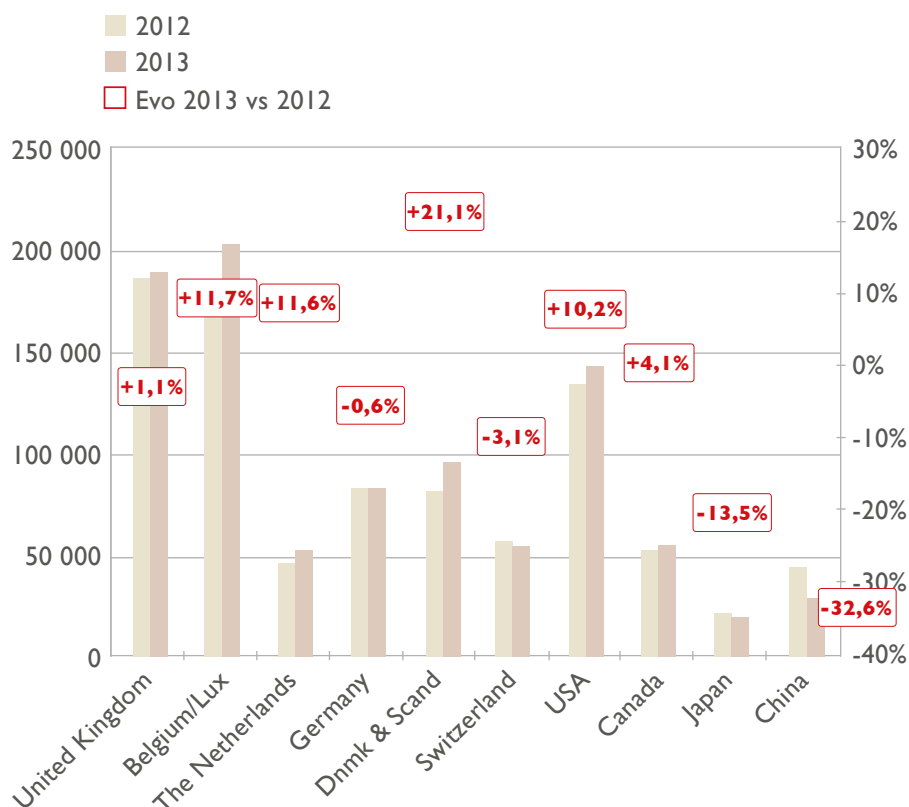
AOC wine exports

Sources : French Customs / Inter Rhône estimates

With a +5% increase in 2013, exports of Rhône Valley AOC wines continued to grow



Even though Asian countries declined in 2013, strong growth was experienced in Belgium (203,000 hl, +12% by volume), the USA (146,000 hl, +10%), and Scandinavian countries, including Sweden



Progression of Rhône Valley

AOC wine exports

Sources: French Customs / Inter Rhône estimates

In the USA, Rhône Valley AOC wines have achieved an increasingly stronger position within imported wines. The Rhône has grown by 66% in 5 years and is among the top 5 wine regions spontaneously mentioned by U.S. Trade professionals, along with Bordeaux, Burgundy, Rioja and Tuscany (Wine Opinions/Inter Rhône 2012 research).

Along with Chile and Australia, regular wine drinkers in the U.S. consider that Côtes du Rhône wines offer the best value for money within the \$15-20 strategic price bracket of imported wine (source: Wine Intelligence Rhonetrac research 2013).

Le Rhône figure dans le top 5 des régions citées spontanément par les professionnels américains

Région	% correspondants
Bordeaux	47%
Burgundy	46%
Tuscany	29%
Rhône	27%
Rioja	25%
Italy/Italian	20%
Piemonte	19%
France/French	18%
Champagne, Loire	17%
Mendoza, Spain/Spanish	15%
Australia/Australian	14%
Argentina	12%
Chile/Mosel	9%
New Zealand, Alsace	8%
Marlborough, Chianti	6%
Barossa, Germany/German, Porto	5%
Portugal, South America, Languedoc, Piorato	4%

In Belgium, Rhône Valley wines have reinforced their position as well known and appreciated wines. With a 84% prompted awareness level, the Côtes du Rhône are in third place in the French AOC wine category (source: Wine intelligence Rhonetrac consumer research 2013). The appellation enjoys one of the highest conversion rates - the percentage of consumers who know the wine and have bought it over the last three months - among AOC wines (n°2).

The Swedish market has shown increasing interest in Rhône Valley wines. With a 53% prompted awareness level, the region is among the top 10 wine regions known by Sweden consumers. These consumers see Côtes du Rhône wines as being excellent quality wines, perfect for enjoying when relaxing with friends (Wine intelligence Rhonetrac research 2013). Thanks to important listings with the Monopoly, exports reached 37,000 hl in 2013, i.e. growth of 73% compared to 2012.

2013 Key figures

70 014 hectares and **5 500** wine growing businesses

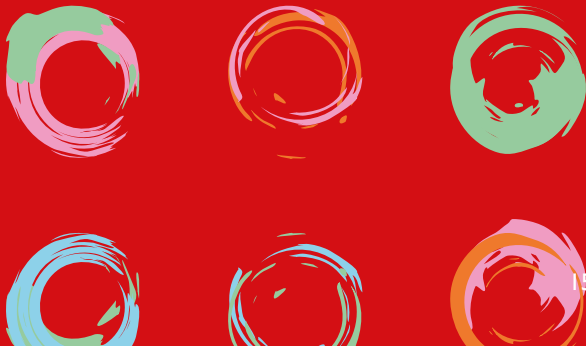
2,5 million hl harvested in 2013

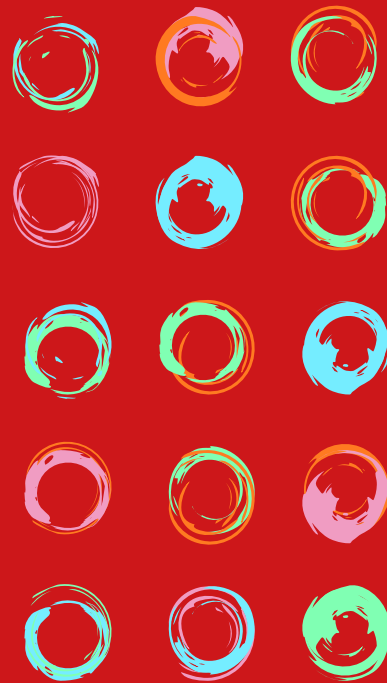
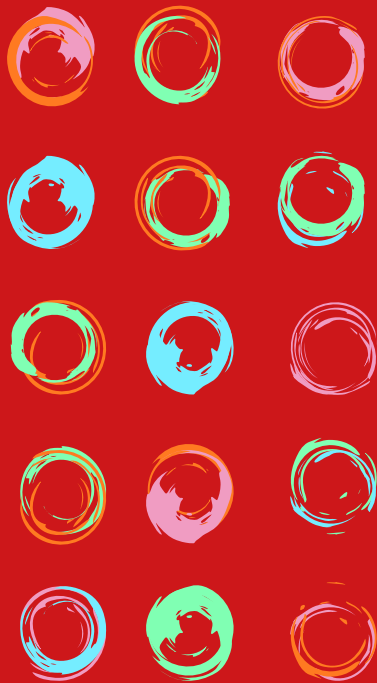
400 million bottles sold in 2012/2013

1,4 billion turnover generated by Rhône Valley AOC wines in 2013

159 countries around the world consumed Rhône Valley wines in 2013

94% of wine drinkers in France know the Rhône Valley AOC wines





INTER RHÔNE

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CÔTES DU RHÔNE & VALLÉE DU RHÔNE

Rhone Valley AOC wine region key figures 2013

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For Rhône Valley wineries and trading companies
(maisons de négoce), full economic information can be found on
the www.vins-rhone.com website, Members section