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Bordeaux Gains Ground in Fine-Wine Auctions

iDealwine reported higher sales and rising bottle volumes as collectors kept bidding on top estates.

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Bordeaux is showing fresh strength in the fine-wine auction market, with new data from iDealwine pointing to higher sales, more bottles changing hands and renewed demand for some of the region's best-known estates.

The Paris-based auction platform said its 2025 sales reached €42.4 million, up 9% from the previous year, while the number of bottles sold rose 19%. Bordeaux played a central role in that growth. The region accounted for 105,274 bottles sold at auction last

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year, or about one in three bottles traded through iDealwine.

The figures come as the wine trade enters the spring en primeur season in Bordeaux, when châteaux release their latest vintages for future delivery. The auction results suggest that, despite years of concern about falling interest in Bordeaux compared with Burgundy and other regions, collectors are still willing to buy the region's top names when prices and provenance are right.

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At the top of the market, the hierarchy remained familiar. Petrus, Château Mouton Rothschild and Château Lafite Rothschild led the field by value traded, just as they did in 2024. Petrus was again the only property with an average auction price above €2,000, reaching €2,480 even after volumes

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fell 11% and its average price slipped 4%.

The first growths classified in 1855 continued to dominate the upper end of the market. Mouton Rothschild and Lafite Rothschild both increased their total value because more bottles came to market. Mouton sold 1,927 bottles in 2025, up 33%, while Lafite sold 1,691 bottles, up 22%. Those were the highest bottle counts among Bordeaux's top 20 properties.

The broader trend was volume-led rather than driven by sharp price gains. That suggests that more sellers are bringing Bordeaux to auction and that buyers are still active enough to absorb supply. It also points to a market that remains selective: demand is strongest for established names with long records of quality and global recognition.

Some estates saw especially strong gains. Château Lafleur doubled its auction volume in 2025 after leaving the Pomerol appellation, a move that appears to have drawn attention from both collectors and consignors. Château Figeac also posted a strong

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year, with volume sold rising 72% and average price slipping only 3%, reinforcing its position after being elevated to Premier Grand Cru Classé A status.

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Outside the top tier, several other Bordeaux estates recorded large jumps in value. Vieux Château Certan rose 141%, Château Canon gained 112%, Château Rauzan-Ségla climbed 91% and Château Smith Haut Lafitte advanced 88%. Those increases suggest that buyers are widening their focus beyond the most obvious trophy wines.

Average prices also showed how concentrated demand remains at the very top. Château Le Pin ranked just behind Petrus at €2,417 on average, underscoring the premium attached to

tiny Pomerol estates with limited production and strong reputations.

The report also shows how Bordeaux is performing against Burgundy in different markets. Burgundy still leads in major fine-wine centers such as Hong Kong, South Korea and the United States. But Bordeaux remains deeply rooted in several European markets and has regained ground in places where Burgundy had been gaining share.

In Singapore, once considered a Bordeaux stronghold, Burgundy and Bordeaux were tied last year at 34% each of shipped volumes. In Germany, Burgundy overtook Bordeaux by value in 2025 at 36%, though Bordeaux still led by volume at 34%. Switzerland remained a strong Bordeaux market, with the region accounting for 37% of value and 31% of volume. Spain showed a sharp rebound for Bordeaux, which rose to 46% of auction value from 36% in 2024. In Scandinavia, Bordeaux regained the lead with 34% of value and 31% of volume.

iDealwine said its data reflects bidding from more than 60 countries, giving it a

broad view of how tastes are shifting across markets. The company's annual barometer is closely watched because it tracks not only prices but also which wines attract bidding wars and where demand is strongest.

The latest numbers suggest that Bordeaux is not staging a dramatic comeback so much as proving that it still matters. Burgundy may continue to command more attention in some markets, but Bordeaux's depth remains visible in auction rooms where blue-chip names still draw steady bidding and where rising volumes indicate that collectors have not turned away from the region after all.

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