



PURE CHABLIS

One grape
One region
One of a kind

Market report

France:

Chablis, the leading Bourgogne AOC in the bar, hotel and restaurant sector



2022 key figures for Chablis wines in France

Internal market: 12.3 million bottles (estimate for 2022)

- Made up in bottles ▶ Retailers (hypermarkets, supermarket etc): 4.1 million
- ▶ Traditional channels (restaurants, wine shops, direct sales, etc): 8.2 million

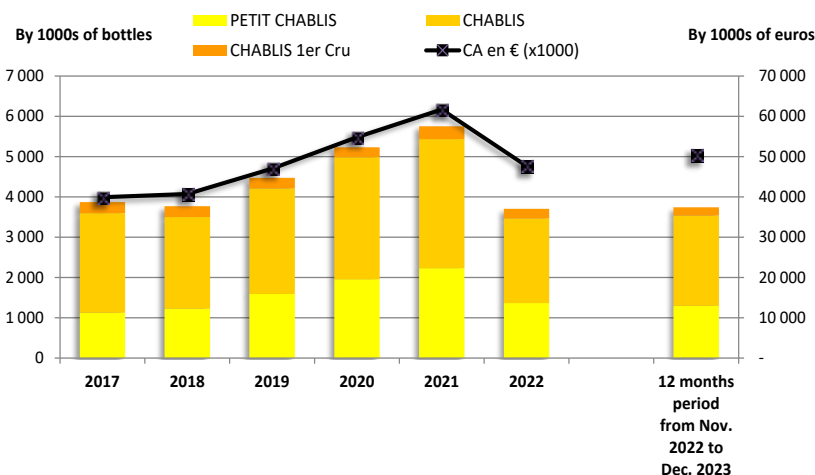
French economic growth in the third quarter of 2023 is expected to reach 0.8%, according to the French Ministry of the Economy, Finance and Industry. Household purchasing power stagnated in the same quarter (down 0.1%), though it increased overall in 2023, while remaining 4.9% below its pre-pandemic level. Bourgogne wines were impacted by this situation. With the arrival of the 2022 vintage on the market, Bourgogne is moving back into positive figures for certain appellations, but sales volumes remain below pre-pandemic levels.

Chablis accounts for over 20% of Bourgogne white wine sales in the supermarket sector

Over the 12 months period from December 5, 2022 to December 3, 2023, Bourgogne white wines accounted for 15% of the volume of French white AOC still wines sold by retailers, for 23% of turnover. In this sector, Chablis wines accounted for 23% of Bourgogne white wine volumes and 29% of turnover.

Chablis wines sales by major retailers

(source: CIRCANA&IRI => Hypers + Supers + Proxis + Drive, without discount stores / BIVB)



The return of Chablis wines to the retail sector, with a more generous 2022 vintage in terms of volume, was hampered by a flagging household purchasing power and ongoing inflation. Prices in 2023 were aimed at a smaller segment of more affluent consumers, resulting in a 5% drop in volumes purchased and a 3% rise in turnover for Chablis appellations. AOC Chablis contributed to maintaining positive sales figures, with a 8% increase in value despite slightly lower sales volumes (down 0.8%).

Chablis, Bourgogne's best-selling AOC in restaurants

Sales of wine to restaurants by the nine major French companies, wholesalers and cash and carry outlets, rose by 26% in 2022 (/2021, down 18% compared with 2022/2019), with a turnover of 619.4 million euros (up 33% 2022/2021, down 8% 2022/2019). **Sales of Bourgogne wines have been more dynamic than those from other wine-growing regions:** Bourgogne is the only French AOC wine-growing region to have returned to its pre-pandemic bottled sales volumes (4.5 million 75cl bottles in 2022). It makes up 14% of the AOC market share in terms of sales for only 9% of bottled volumes. Bourgogne white wines are in first place in terms of turnover among French AOC wine regions (€28.87 million), and show the biggest increase in terms of value (up €8.6 million compared with 2022/2021).

Chablis wines account for 23% of the volume of still Bourgogne wines sold, with a growth of 30% in 2022 (/2021). Chablis (up 39% 2022/2021 and up 2% 2022/2019, including Chablis 1er Cru) and Petit Chablis (up 13% 2022/2021 and down 10% 2022/2019) are among the top five white Bourgogne AOCs sold by wholesalers and cash and carry outlets.

A survey carried out in **the second quarter of 2022** among 1,200 mid to high-end French restaurants shows that **Bourgogne is the leading wine region in terms of its share of still wine on offer in this sector.** It accounts for 19% of wines (ahead of Rhône and Bordeaux), despite a rather high median price. It can be found on the tables of more than three out of four restaurants, with an average of nine wines per establishment.

In the white wine market, Bourgogne is by far the leading wine region in terms of number of wines, with 28% of the national offer. It has to contend mainly with Loire wines, as well as with local competition in the wine-growing regions.

With an appearance rate of 33%, AOC Chablis is the Bourgogne appellation with the highest presence in bars, hotels and restaurants, up on 2019.

40.1 million consumers of still wine in France in 2023

According to the research firm Wine Intelligence, **40.1 million French adults drank wine in 2023** (down 2% since 2018), and 35.6 million were regular consumers (drinking wine at least once a month, a figure which remains unchanged compared to 2018).

This population is evolving, ageing and consuming wine less regularly. Within it, the share of very young consumers (18-24 years old) is falling, while over the past five years, consumption by Millennials (25-39 years) has stabilized. This suggests that very young consumers are delaying their entry into wine consumption.

For the 1,000 consumers surveyed, the number one alcoholic beverage is red wine, followed by white wine and, finally, rosé wine. Between 2019 and 2023, this order remains unchanged, although red and rosé wines are losing consumers, while white wines are not.

Hypermarkets and supermarkets remain the preferred purchasing points in France. However, they are losing buyers to traditional channels (wine shops were up three points between 2023 and 2022) and local establishments (that remained stable among producers).

Between 2022 and 2023, purchases by production region stabilized. However, Bourgogne wines are gaining new buyers (an increase of four points for Bourgogne wines between 2023 and 2022) and Chablis AOCs continue their upward trend.

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(Sources: BIVB – CIRCANA&IRI – Wine Intelligence)

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