



PURE CHABLIS

*One grape
One region
One of a kind*

Market report

Sweden

Chablis, a benchmark for consumers



Key figures for Chablis wines

Fifth biggest market in terms of value and volume

Exports: 1,26 million bottles (down 23,5%/2022), for €9.63 million euros (down 21,3%/2022)

By volume

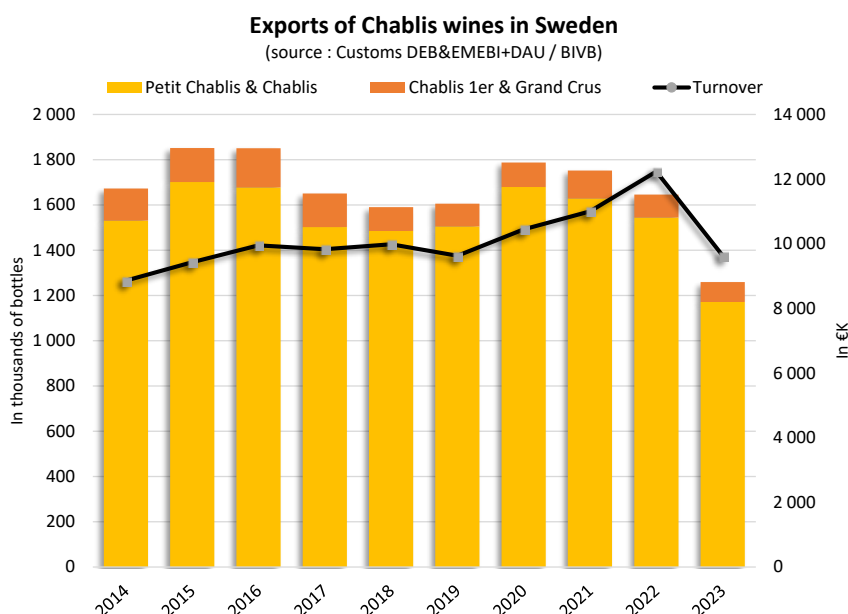
- ▶ Chablis Premier Cru and Chablis Grand Cru : 7%
- ▶ Petit Chablis and Chablis : 93%

The Swedish economy went into recession in the third quarter of 2023, with household consumption in decline, high inflation and high interest rates... Forecasts suggest the country's economic growth could also be negative in 2024.

Sales of Bourgogne white wines dominate the Swedish market. In 2023, they made up 38% of the volume of French white wine appellations exported to Sweden. Over the past 20 years, Bourgogne's exports to Sweden have focused primarily on this color and this incredible growth has been driven by the excellent reputation of Chablis wines.

Chablis wines: the most exported French AOCs to Sweden

Like most French AOC white wines, exports of Chablis wines are being impacted by the drop in household consumption, with a 23,5% fall in volumes in 2023 (/2022). We need to go back to 2012 to find this level of Chablis wines exports.

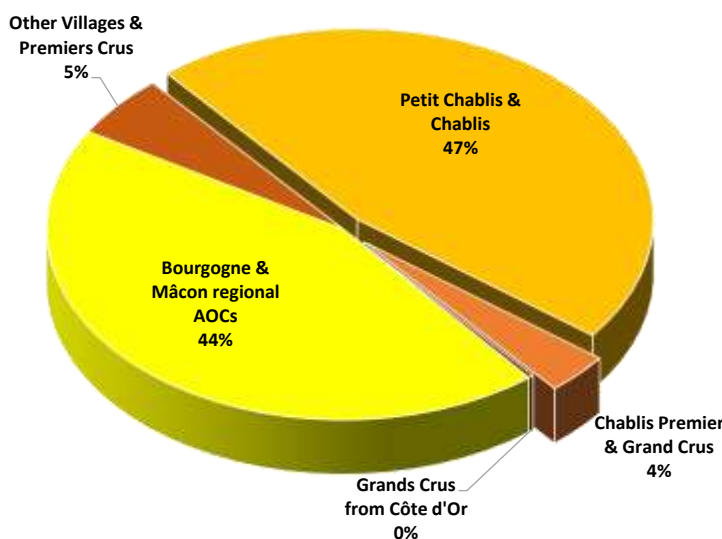


The effects of inflation and a limited supply in the face of a strong demand also played a role. But even vineyards whose prices have remained relatively stable have seen their exports fall.

Chablis AOCs continue to be a benchmark in Sweden, even if export volumes are declining. They are far and away **the most exported French AOC white wines to Sweden**, accounting for 19% of white AOCs in volumes and for 27% of their turnover in 2023.

Bourgogne exports boosted by Chablis wines

Importance of Chablis Wines in the export volumes of Bourgogne white wines
(source : Customs DEB&EMEBI+DAU / BIVB, 2023)



Sales of Bourgogne white wines dominate the Swedish market, accounting for 48% of bottles of Bourgogne wines shipped in 2023 (the equivalent of 2.51 million 75cl bottles, for 19 million euros).

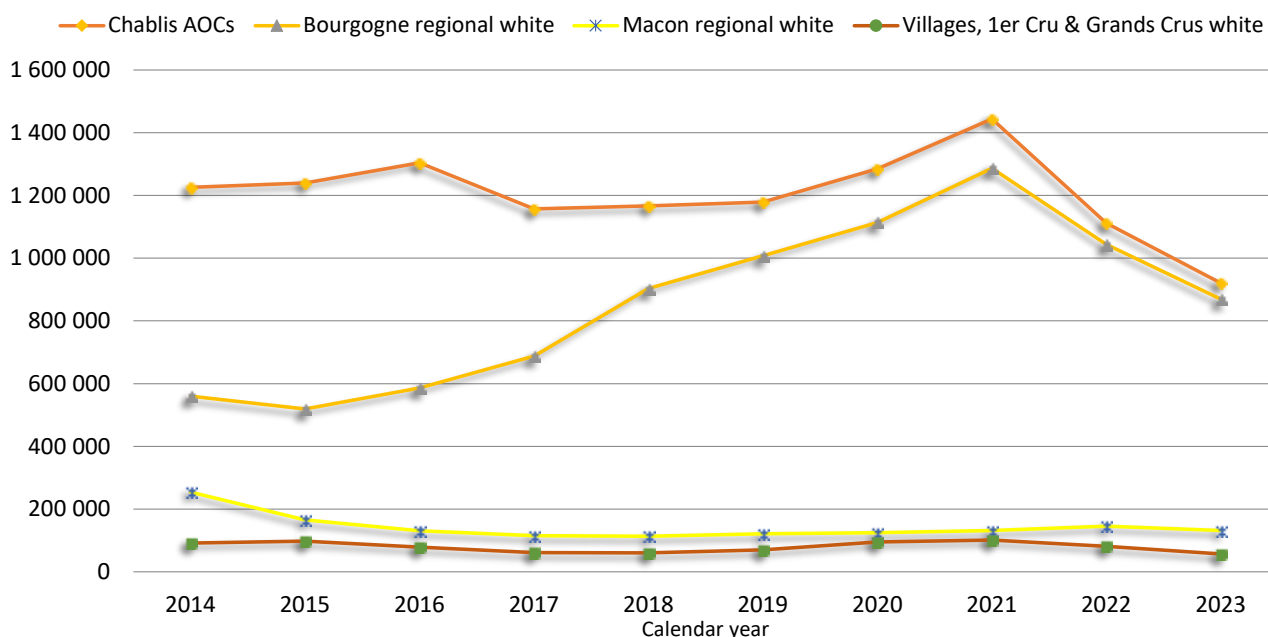
This incredible boom is underpinned by the reputation of **Chablis wines**, which account for more than half of all exports of Bourgogne white wines, and 24% of all Bourgogne wines shipped to Sweden.

According to a study carried out by Wine Intelligence in June 2023, Chablis wines rank 11th in the top 15 of most purchased wines. Perhaps not surprising in a country which loves Chardonnay. Bourgogne is seventh in the same survey.

AOC Chablis is even more present

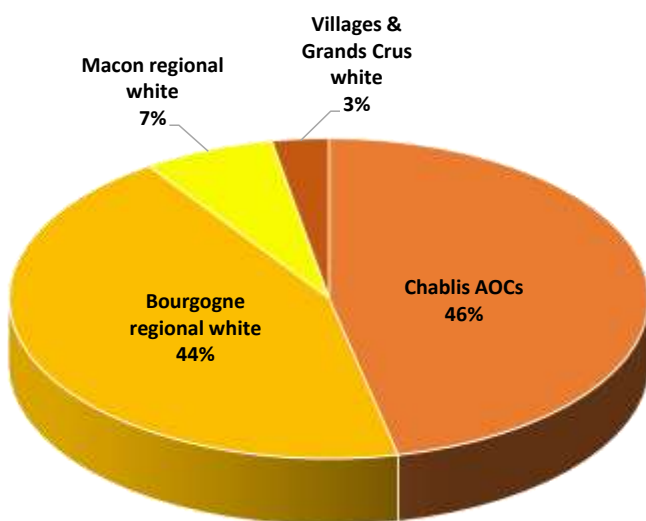
The turnover of Bourgogne wines at the monopoly returns to a normal growth and to pre-pandemic levels, +4,6% (2023/2019) with 718 million SEK thanks to growing sales of Crémant de Bourgogne and Mâcon Regional white AOCs. The global sales of Bourgogne wines at the monopoly represent approximately 81,5% of the volumes sold in Sweden, that is to say 4,324 million 75cl bottles in 2023.

Sales of Bourgogne white wines (outside of the bar, hotel and restaurant sector) in Sweden by types of AOCs (75cl bottles)



After a record year in 2021, sales of Chablis wines fell by 17% in terms of volume in 2023 (/2022). This represents the equivalent of 920 thousand 75 cl bottles, being 46% of Bourgogne white wines volumes sold outside the bar, hotel and restaurant sector.

Sales of Bourgogne white wines in 2023 (Volume in %)



Petit Chablis has always been the best-selling Chablis wines appellation, accounting for 49% of Chablis wines volumes in 2023.

However, Chablis is becoming increasingly significant. In 2023, this appellation accounted for 46% of Chablis wines sales in terms of volume, up seven points on 2020. It is down in volume by 14,5% in 2023 (/2022), but its turnover is up 3% compared with pre-pandemic levels (2023/2019), while Petit Chablis is down by 29,9% in volume and 16% in value (2023/2019).

In 2023, Chablis Premier Cru and Chablis Grand Cru share the remaining 5% of the Chablis appellations sales in volume (outside of the bar, hotel and restaurant sector) and 9% of their turnover.

A growing number of consumers

In 2023, 4.3 million of Swedes drank wine regularly, at least once a month, compared with 3.8 million in 2021. These consumers represent 52% of the adult population, and two thirds of them drink wine every week. According to Wine Intelligence, the proportion of regular consumers remained stable between 2017 and 2023, while the proportion of Swedes who consumed wine on a weekly basis grew by 7.7%.

The demographic breakdown of those who drink wine regularly has remained broadly the same since 2019. Baby boomers tend to choose wines to accompany their meals, indicating a greater emphasis on food and wine pairings. Millennials are far more inclined to explore new types of wine on a more regular basis, which they see as lending them an air of sophistication.

For nearly 1,000 regular consumers who were questioned, the alcoholic beverage most frequently consumed is red wine, followed by white wine, and then beer. Between 2019 and 2023, this order remains unchanged, although other drinks such as Prosecco, Cava and strong spirits are growing in popularity.

The Swedish state-owned Systembolaget chain of stores is the only place where wine can be bought in Sweden. Online sales are growing strongly, both for Systembolaget stores and for wine websites outside the direct control of the monopoly. Cross-border purchases inevitably declined with the pandemic.

Wine consumption for 2023 in restaurants and bars has not returned to 2019 levels. Regular consumers aged 27 to 42 are the most likely to say they buy wine in bars, while younger consumers are most likely to say they buy it in restaurants, much more so than those in the over-40s age group.

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(Sources: Customs - Wine Intelligence - BIVB)

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