



# PURE CHABLIS

One grape  
One region  
One of a kind

## Market Report

### Sweden

## Chablis seeking enhanced value levels



### Key 2021 numbers for Chablis wines

5<sup>th</sup> market by value and by volume

**Exports: 1,752 million bottles (- 2 %/2020), for 11 million euros (+ 5 %/2020)**

- Of which, by volume ▶ Chablis Premier Cru and Chablis Grand Cru: 7 %
- ▶ Petit Chablis and Chablis : 93 %

The Swedish economy has bounced back to its pre-crisis level and is making a comeback. It grew 4.9% in 2021 and should increase a further 3.7% in 2022 according to the COFACE (French insurance company for foreign trade). This predicted growth relies of course on the removal of pandemic-related restrictions, as well as the continued recovery of domestic consumption and investments.

In the sales of French white wine to Sweden, it is the Bourgogne whites that dominate: they account for 46.5% by volume of French white appellations exported to the country in 2021. In fact, over the last twenty years, Bourgogne export growth to Sweden has primarily centered on whites. And underlying this remarkable surge is the strong reputation of the Chablis appellations.

### Record sales in 2021

Chablis wine exports set a new record in 2021, reaching a sales level of 11 million euros (+5%/2020 and +10%/five-year average).

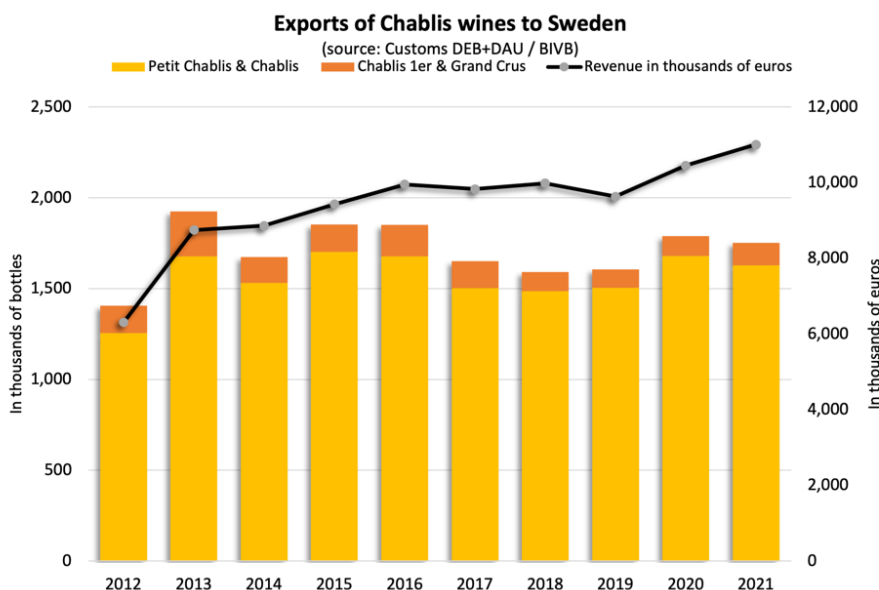
Despite a decrease of Chablis wines exported in terms of volume, the growth continues to evidence itself

over a 5-year average by +3.2% (2021/five-year average).

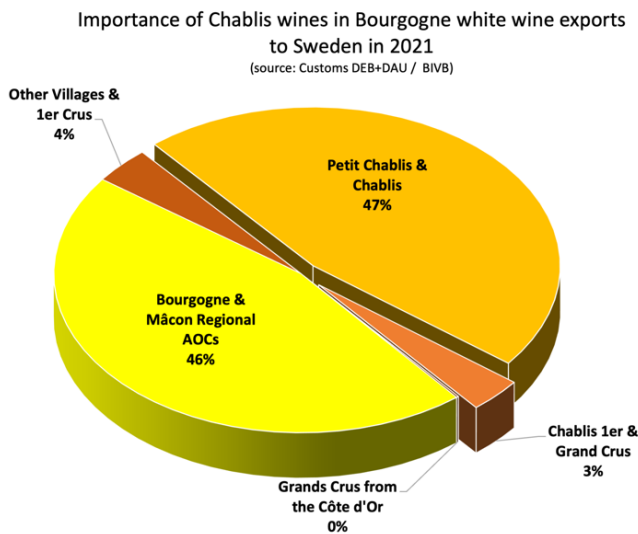
Only the Petit Chablis appellation seems to be in decline in volume between 2020 and 2021 (source: Gamma DAE).

The Chablis 1er Cru and Chablis Grand Cru appellations register a twofold growth of 13% by volume and 20% by sales in this market between 2020 and 2021.

The Petit Chablis and Chablis appellations are looking to rise from a valuation perspective, with a decrease of -3% by volume, but an increase of +3% in sales between 2020 and 2021.



## Bourgogne exports driven by Chablis wines



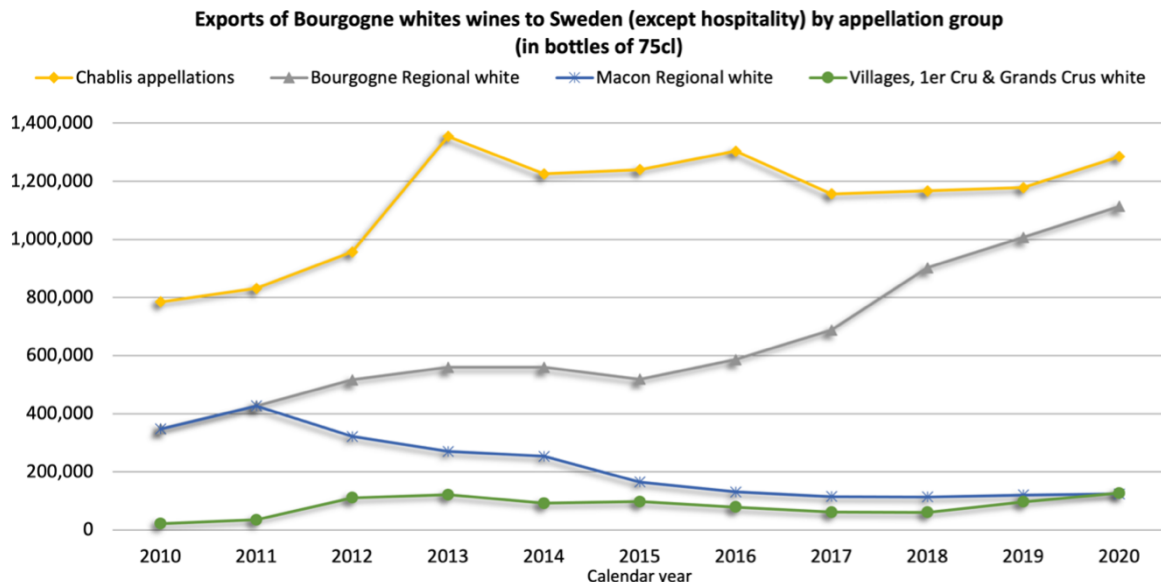
In the sales of Bourgogne wines to Sweden, it is the whites that dominate: they account for 56% of the bottles shipped to Sweden in 2021 (3.49 million equivalent 75 cl, for 20.7 million euros).

Underlying this remarkable surge is the strong reputation of Chablis wines, which account for more than half of still white wine Bourgogne exports, as well as 28% by volume of the entirety of Bourgogne wines shipped to the country. According to a Wine Intelligence study dated June 2021, Chablis wines are in the 11<sup>th</sup> position among the top 20 most purchased vineyards. This does not come as a surprise for a country with such an affinity for Chardonnay, and which places Bourgogne in the 6<sup>th</sup> position in this same ranking.

## Bourgogne maintains its growth in the (non-hospitality) markets in 2020

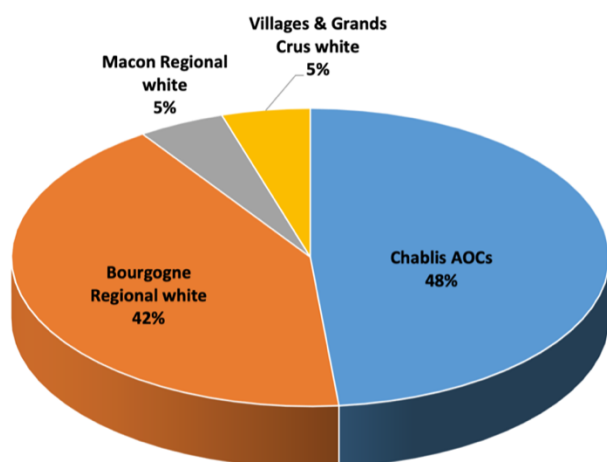
Sales of Bourgogne wines in non-hospitality outlets continued their rise in value for the seventh straight year, establishing a new record (713 million SEK), due to increased sales in 2020 totaling the equivalent of 4.9 million 75 cl bottles.

Sales of Bourgogne wines in non-hospitality contexts account for roughly 80% of volume shipped to Sweden. This increase in 2020 came about despite a new increase in the average sales price (up 3% in 2020), which now stands at 145 SEK/75 cl. Total sales in this context grew 12.5% relative to 2019.



Following a decline in 2017, the sales of Chablis wines returned in 2020 to the level of 2016, the second record year of the past ten. This sales volume, up 9% relative to 2019, corresponds to the equivalent of 1.3 million 75 cl bottles, and 48% of Bourgogne white wine volume.

**Sales of Bourgogne white wine in 2020 by appellation (volume in %)**



The Petit Chablis appellation just by itself accounts for 56% by volume of the Chablis wine sold in 2020. It progressed by 10% relative to 2019. As for the Chablis appellation, it accounts for 39% of volume, up 6% relative to 2019. The two other appellations, Chablis Premier Cru and Chablis Grand Cru, share the remaining 5%.

### A return to consumption falling short of the 2019 level

The Swedish market boasts 3.8 million regular wine consumers (drinking wine at least once a month), i.e. 46% of the adult population, of which 64% drink wine weekly. According to Wine Intelligence, the proportion of regular consumers decreased by 11.6% between 2017 and 2021, and that of consumers drinking wine weekly by -4%.

The regular consumer category is an ageing population. Although consumers over 55 years old state that they do not know much about wine, they enjoy drinking it.

Consumers aged 35-39 seem more involved with wine than older consumers, showing a strong interest in it. Thanks to their easy access to information on the web, they feel better informed than their elders.

For the 1,000 regular consumers in the survey, the alcoholic drink holding the first position is red wine, followed by white wine, with beer coming third. Between 2017 and 2021, this ranking remains the same, despite the growth in consumption of other drinks such as Prosecco, Cava and craft beer.

The Swedish monopoly wine and liquor stores "Systembolaget" are the main place consumers go to buy wine. Web sales/e-commerce, however, is growing in this market both for the Systembolaget stores and for wine websites that do not fall under the direct control of the monopoly. Cross-border purchases have inevitably decreased with the health crisis.

Wine consumption in restaurants and bars has not returned to what it was in 2019. Regular consumers aged 25 to 39 are most likely to say they buy wine in bars. The youngest, aged 18 to 24, are most likely to say they buy wine in restaurants, much more so than the 40+ generations.

*Economic report produced by the Markets and Development department – BIVB- February 2022  
(Sources: Customs - Wine Intelligence - BIVB)*

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