



PURE CHABLIS

*One grape
One region
One of a kind*

Market Report

Australia

Exports are Slowing Down After Four Years of Growth

Key statistics for Chablis wines in Australia — first 11 months of 2024

9th largest market by value
10th largest market by volume

Export: 556,754 bottles (-10.8% compared to the same period in 2023), for €6.66 million (-8.5% compared to the same period in 2023).

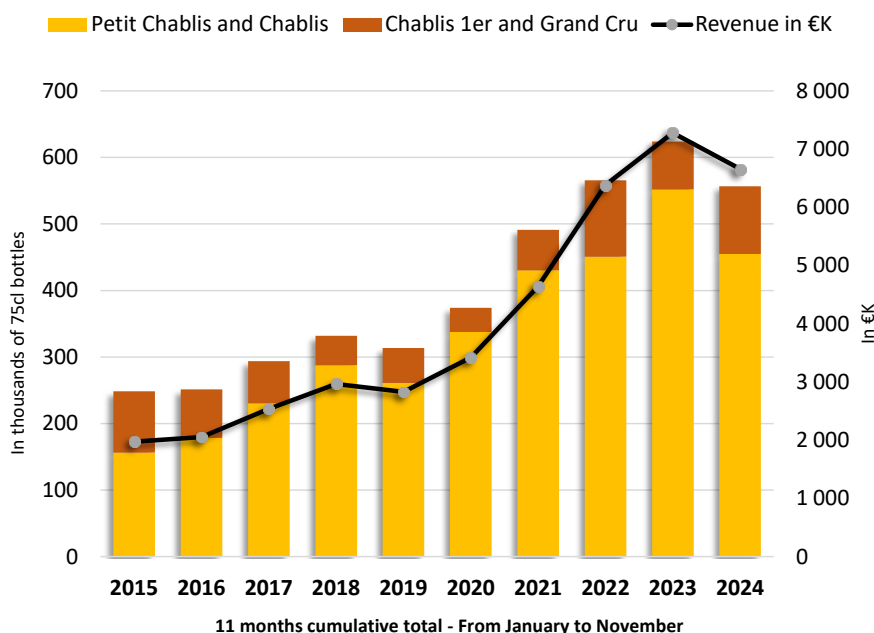
Breakdown by volume ► Petit Chablis and Chablis :82%
► Chablis Premier Cru and Chablis Grand Cru :18%

According to the OECD, Australia's economic growth is set to slow to 1.5% in 2024. This deceleration is slowing down household and business spendings. The outlook for 2025 suggests a gradual recovery, with growth of 2%, supported by improved domestic demand and a possible stabilization of global economic conditions.

Despite an increase in its adult population of 2.7 million over the past 5 years, Australia is experiencing a decline in wine consumption. While beer remains the preferred drink, wine drinkers seem to be more discerning, and 27% of them express a preference for Chablis wines!

An Important Market for Chablis Wines

Chablis wine exports to Australia
Source (Customs DEB&EMEBI and DAU / BIVB)



After four years of growth, exports to Australia are slowing. The economic situation and declining consumption are likely contributing factors to this slowdown.

Indeed, following the record year of 2023, exports of Chablis wines fell by 10.8% in volume over the first 11 months of 2024. Although revenue during this period dropped by 8.5% compared to 2023, it still represents the second-highest export value of Chablis wines to Australia, exceeding €6.6 million.

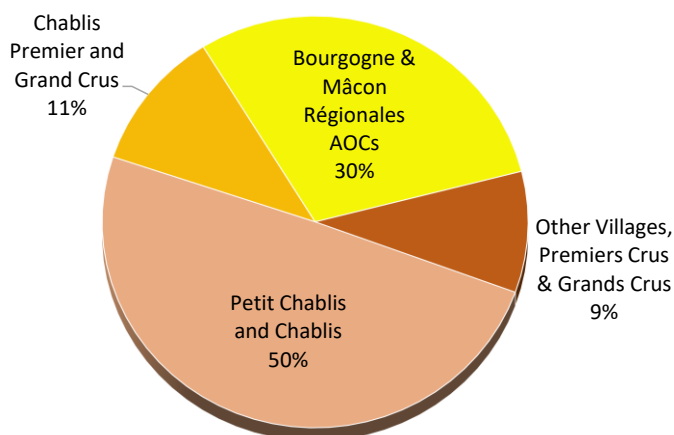
AOCs Chablis Premier and Grand Crus saw an upswing in 2024, achieving record revenue levels.

Meanwhile, the Petit Chablis and Chablis appellations, which performed exceptionally well in 2023, have slowed. Nevertheless, it is worth noting that over the past 20 years, the Australian market has risen from 20th to 10th place for Chablis wines.

Chablis: The Leader in Bourgogne Exports

Share of Chablis wines in white Bourgogne wines exports

11 months cumulative total from January to November 2024
(source : customs DEB&EMEDI + DAU)



In the first 11 months of the year, white wines accounted for 65% of Bourgogne volumes exported to Australia, generating 54% of the revenue (+3% in value, 11 months 2024 vs. 11 months 2023). Chablis AOCs, with 61% of the volumes of Bourgogne white wines exported, come in first place (47% of the value for this color).

After several years of growth and a record-breaking 2023, there is a slowdown in the exports of Chablis wines for the first 11 months of 2024 (-10,8% vs. 11 months 2023).

Yet, Chablis wines keep their market share in the medium term: +17.5% in volume and +35.6% in value (first 11 months of 2024 vs. the average for the first 11 months of the past five years).

Finally, Australia is becoming an increasingly important destination for Chablis Premier and Grand Crus. Over the past 10 years, it has risen from 12th to 9th place by value and from 13th to 10th place by volume among importing countries (based on data from the first 11 months of 2024).

Fewer but More Knowledgeable Consumers

Off-trade wine purchases (supermarkets, stores, wine merchants, etc.) account for 80 to 90% of wine purchases in Australia, with over 480 million bottles sold in 2023. This segment has seen an 11.8% decline post-Covid (2023 vs. 2018). Purchases in the on-premise sector (hotels, cafés, restaurants) account for the remaining, but they have declined even more sharply—by more than a third compared to 2018, before the Covid-19 pandemic.

In this context, Chablis wines have performed relatively well, with exports increasing by 88% in volume between 2018 and 2023.

Among still wines, consumers overwhelmingly favor local Australian and New Zealand products, which account for 94% of the volume purchased (excluding the on-premise sector).

Only 25% of consumers purchase French wines, yet their sales have increased by 3% in volume every five years, reaching 13 million bottles in 2022. Despite the average price of French wines being three times higher than Australian wines, this growth continues. Excluding the on-premise sector, French wines benefit from the rise in purchases priced over 23 AUD per bottle (14€), while sales of wines under 15 AUD (9€) have declined. Indeed, increasingly experienced consumers are seeking higher-end wines, which benefits Chablis Premier Cru and Chablis Grand Cru.

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(Sources: Customs – BIVB – Wine Intelligence/IWSR)

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