



Switzerland

In 2016, exports of Chablis flagged



Key figures in 2016 for Chablis wines in Switzerland

13th biggest market in terms of revenue

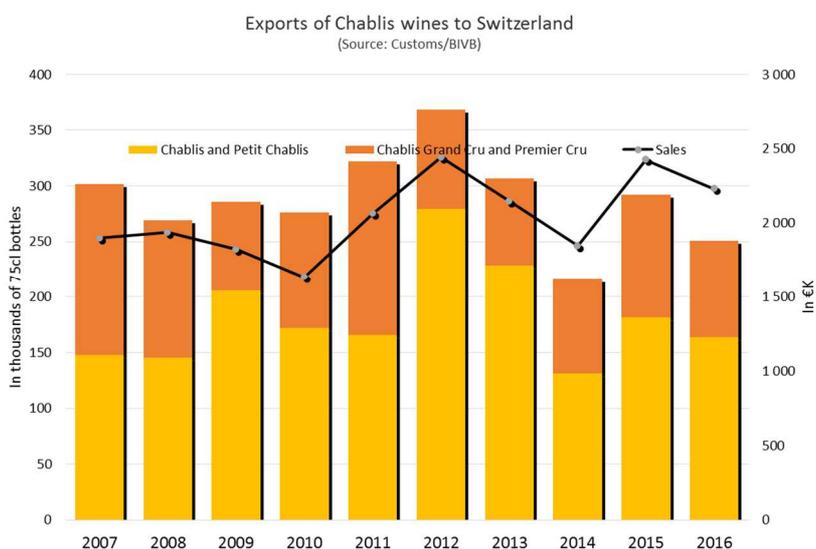
13th biggest market by volume

Exports: 250,900 bottles (down 14% on 2015), for 2.23 million euros (down 8% on 2015)

by volume

- ▶ Chablis Premier Cru and Chablis Grand Cru : 35%
- ▶ Petit Chablis and Chablis : 65%

The effects of a reduced harvest



After an increase in exports in 2015, the trend was reversed in 2016. Anticipation of the arrival on the market of the smaller 2016 vintage could in part explain this. Sales fell 14% by volume compared to 2015, and 8% in terms of revenue. Nonetheless, the dip in 2016 does not reflect the underlying trend, since revenue in that year was 2% higher than the average over the previous five years from 2011 to 2015.

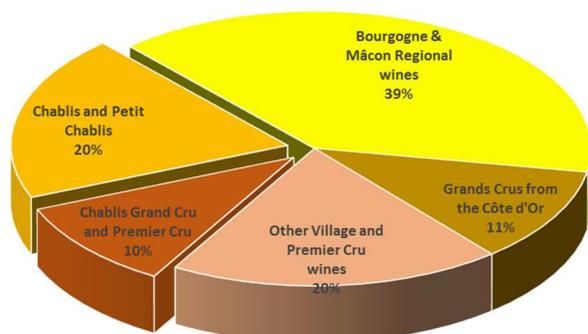
The drop in volume affected all four appellations: Chablis and Petit Chablis slipped 10% by volume and 2% in terms

of revenue, while the Chablis Premier Cru and Grand Cru AOCs slumped 21% by volume and 15% in terms of revenue.

It should be noted that Premier Cru and Grand Cru wines accounted for 35% of volumes of Chablis wines imported to Switzerland, whereas they account for only 20% of the volume produced.

Bourgogne white wines overtake reds

White Bourgogne wine exports to Switzerland
(Source: Customs/BIVB 2016)



In 2016, volumes of Bourgogne white wines exported to this market were for the first time greater than the volume of Bourgogne reds, accounting for 53% and 46% of the total respectively (the remaining 1% made up by Crémant de Bourgogne). Despite sales of Chablis falling back, they still contributed to the performance of Bourgogne wines in Switzerland, accounting for 30% of the volume of Bourgogne white imported, and 16% of the total volume of Bourgogne wines.

Their proportion of the total revenue for white Bourgogne wines was 17%. Over the past two decades, the growth in exports of Bourgogne white wines to Switzerland has to a large degree been

driven by the notoriety of Chablis wines. On average, they accounted for 36% of all Bourgogne white wines shipped there over the past 20 years.

Growth in the e-commerce market

► Switzerland, a mature market

Over the past 10 years, it is the third time that wines imports to Switzerland dipped below the bar of 185 million liters. That was the case in 2008, 2013, and 2016 (down 1.5% on 2015). But despite affecting Chablis, this drop globally spared imports of white wines: The magazine Schweizerische Weinzeitung underlined that with 35 million liters that year, white wine imports have never been so high.

Average wine consumption per inhabitant was 35 liters in 2015, but is estimated to have fallen in 2016. Nonetheless, this performance should be kept in perspective, since the strength of the Swiss franc and the increased personal import allowance – which was raised from 2 to 5 liters in July 2014 – stimulated purchases in the wine regions of bordering countries, but these are not included in official import statistics.

The Swiss wine market is concentrated on a few importers, the 10 biggest import almost two-thirds of all wines and the four biggest distributors – Coop, Denner, Lidl and Aldi – import 47% of all wines between them.

► E-commerce market significant in Switzerland

Internet and social media are leading sources of information: Studies show that 70% of online consultations are followed by visits and purchases in stores. More than half of consumers seeks advice online before buying. QoQa Vins, which sells wine online, saw sales go from 188,000 liters to nearly 300,000 liters in three years. E-commerce grew by 10% for Delinat, which sells organic wines via the Internet, and by 5% for the Zurich-based Master of Wine, Philippe Schwander (source: @thomasvino.ch).

This economic report was produced by the Markets and Development department of the BIVB – April 2017

(Sources: Customs – GTI – BIVB)

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