



PURE CHABLIS

One grape
One region
One of a kind

Market Report

United Kingdom

Chablis seeking enhanced value levels



Key 2021 figures for Chablis wines in the UK

- 2nd market in terms of value
- 1st market in terms of volume

Exports: 3.4 million bottles (-33%/2020), for 29 million euros (-15%/2020)

- Of which, by volume ▶ Chablis Premier Cru et Chablis Grand Cru: 25 %
- ▶ Petit Chablis et Chablis : 75 %

The GDP growth rate of the UK surged to 7.5% in 2021, a rate unequaled since World War II, according to the ONS (Office for National Statistics). This increase surpasses that of other developed countries but comes after a historic decline of 9.4% in 2020. The IMF forecasts growth of 4.7% in 2022 and 2.3% in 2023.

The white wines of Bourgogne are dominant in the exports to the UK of French white AOC's. In the last 20 years, Bourgogne exports to the UK have primarily concentrated on whites, which account for 3/4 of the bottles shipped in 2021. These results are based upon the strong reputation of Chablis wines.

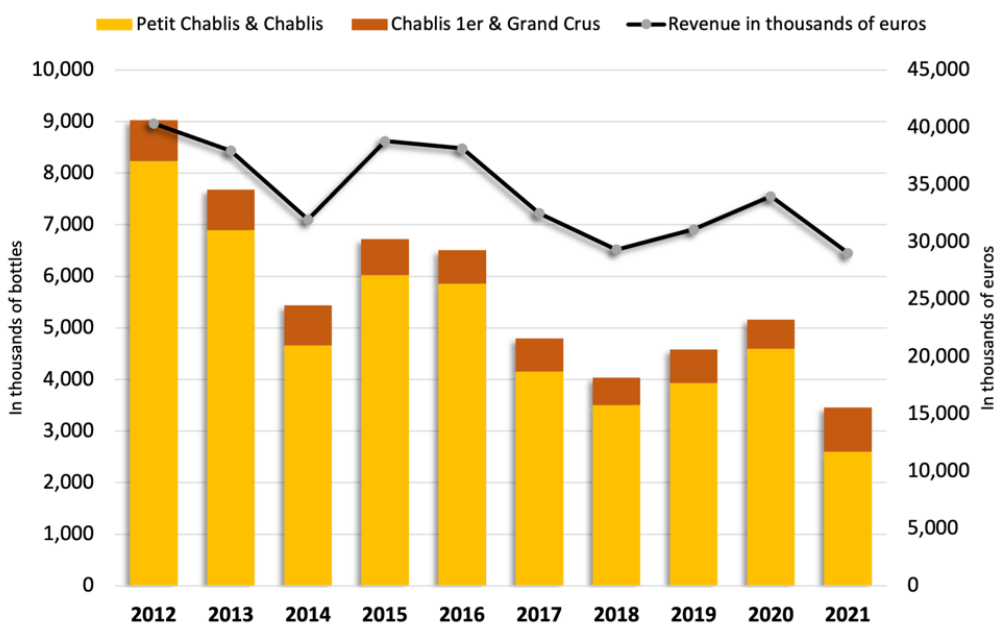
Chablis seeking higher value levels in its first market by volume

The UK is the leading export market for Chablis by volume, with 3.4 million bottles (equivalent 75 cl), which represents 15% of Chablis exports in 2021.

In value, however, the UK market has slipped to second place with 29 million euros, behind the USA.

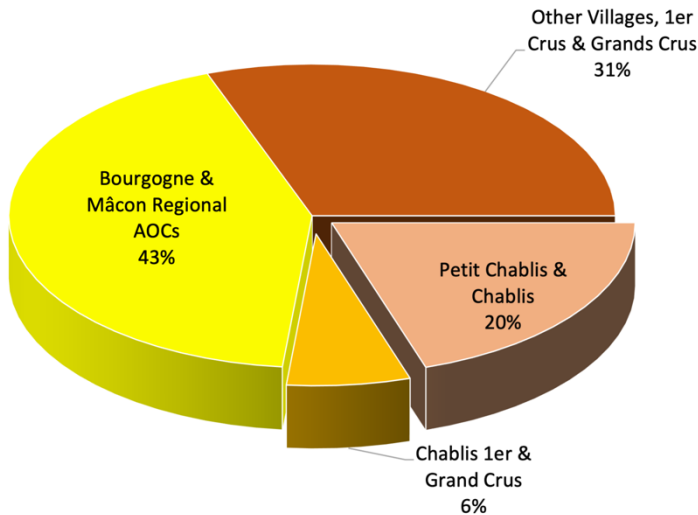
The decreased sales in 2021 are certainly due to the accumulated effects of several factors: Brexit, Covid-19, a small harvest, and the effort by Chablis wines to reach more sophisticated markets in the country. This striving for higher price levels is reflected in the numbers for 2021, which show a greater decrease in volume than in sales. On the other hand, the Chablis Premier Cru and Grand Cru AOC's have gone up both in volume (+51%/2020) and sales (+30%/2020).

Exports of Chablis wines to the UK
Source (Customs/BIVB)



Exports of Bourgogne wines led by Chablis

Importance of Chablis wines in Bourgogne white wine exports to the UK in 2021
(source: Customs)



Sales of white Bourgogne are quite dominant in the UK. They account for 77% of all bottles shipped in 2021, the equivalent of 13 million bottles for 113.8 million euros.

These exports **rest upon the reputation of Chablis wines, which account for 26% by volume and sales of white Bourgogne exports**, and 20.5% of the volume of all Bourgogne wines shipped to the country. According to a study by Wine Intelligence (December 2021), Chablis wines rank 7th in the top 20 best-known and most-purchased wine regions. This is unsurprising in a country which appreciates Chardonnay and places Bourgogne 4th in the same top 20 of best-known wine regions.

Bourgogne wines are present in all distribution channels

In supermarkets

In 2021, the Bourgogne region sold 6.554 million bottles of still wine through supermarkets (-8.5%/2020), for a revenue of 66.484 million pounds (-6.4%/2020). Sales of white Bourgogne wines in supermarkets (72% of total Bourgogne wine volume) decreased 16.4% in terms of volume in 2021 (Source: IRI UK). Chablis wine sales also went down in volume by 26% (2021/2020), with an increase of 11% in the selling price in 2021. The Chablis AOC (79% of the volume of Chablis wines) experienced the largest increase in selling price: +12% (2021/2020), attaining the level of £12.36 per bottle, which inevitably led to a decrease in sales volume (-29%) in 2021.

In restaurants

According to a 2019 survey of 350 London restaurants, Bourgogne wines were in first place in terms of the number of references available per point of sale, with 28 references per location. They were also in first position in terms of white wines available, with 14 references per point of sale.

Chablis appellations were available in 67% of establishments in 2019 and were in first place in terms of global white wine offers (3%).

In wine stores

The Bourgogne region was in first place, present in 94% of establishments surveyed, an increase of 15% over 2018 (2019 surveys of 50 points of sale).

Bourgogne wines were also in first position in terms of references within the global offer, with wine stores offering an average of 44 different Bourgogne wines.

The Chablis appellation was present in 78% of establishments.

In e-commerce

In terms of still French wines, the Bourgogne region accounted for the largest share of the offer (8% of references), with a median price of 34€ (2019 survey of 50 online stores).

For white wines, Bourgogne also held the largest share of the offer (11%), competition coming mainly from Marlborough, the Western Cape of South Africa, and South Australia (each 7% of references).

Although Chablis is by far the most widely available Bourgogne appellation (present on 2/3 of sites), the Mâconnais wines are well-represented too, with Mâcon-Villages and Pouilly-Fuissé available on almost half of the websites.

More and more purchases on the web, young consumers concerned for the environment

The UK is a market of approximately 26.1 million regular wine consumers (at least once a month), about half the adult population, 78% of whom drink wine each week. According to Wine Intelligence, the proportion of regular wine drinkers has increased by 11.5% between 2017 and 2021, as has the proportion of weekly wine drinkers (+8.5%).

The group of regular wine drinkers is an ageing one. Its age 55-and-over members would like to purchase local products and are ready to pay more for high quality. The younger members, on the other hand, say that they are ready to pay more for a product that is made with respect for the environment.

Among the 1000 regular wine consumers surveyed, the first-ranked alcoholic beverage was white wine, followed by red wine, and then beer in third place. Between 2017 and 2021, this ranking is unchanged, but beer gains in relative importance, as does gin.

Supermarkets remain the primary purchase points for wine in the UK, where most of the regular wine consumers surveyed have bought wine in the last 6 months.

Since 2017, wine purchases from supermarkets have risen by 5 percentage points; they account for 25% of the purchases by regular wine consumers in the 6 months prior to the survey.

Economic report produced by the Markets and Development department – BIVB – February 2022

(Sources: Customs – IRI UK - BIVB – MIBD MARKET – Wine Intelligence)

Press contact: Françoise Roure – Marketing/Communication Manager BIVB-Chablis
Tel.: + 33(0)3 86 42 42 22 – Fax: + 33(0)3 86 42 80 16 – francoise.roure@bivb.com