



PURE CHABLIS

One grape
One region
One of a kind

Market Report

United Kingdom

Chablis wines impacted by weakened purchasing power

Key statistics for Chablis wines in the UK

2nd Largest Market by Volume and Value - Cumulative Results for the First 7 Months of 2024



Exports: 1.67 million bottles (-4.7% compared to the first 7 months of 2023),

Total sales: €17.5 million (-7.8% compared to the first 7 months of 2023)

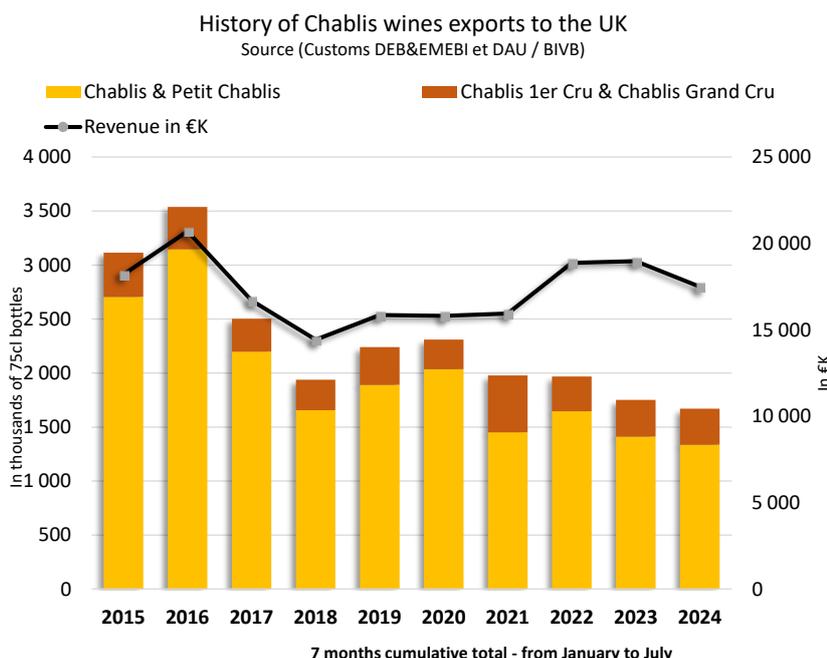
Breakdown by volume ▶ Petit Chablis and Chablis: 80%
▶ Chablis Premier Cru and Chablis Grand Cru: 20%

The United Kingdom is facing relatively weak economic growth compared to other major European economies. According to the IMF and OECD, GDP growth is expected to be around 1.1% in 2024. Against this backdrop, household purchasing power is suffering from inflation. High energy and food prices continue to affect household budgets, reducing their discretionary spending capacity.

Sales of Bourgogne white wines lead exports of French AOC white wines to the UK. In the first 7 months of 2024, they accounted for 37% of these shipments, driven by the strong reputation of Chablis wines.

Decline in Export volumes reflects a weaker economy

Due to a sluggish economic environment, the UK now ranks as the second-largest export market for Chablis



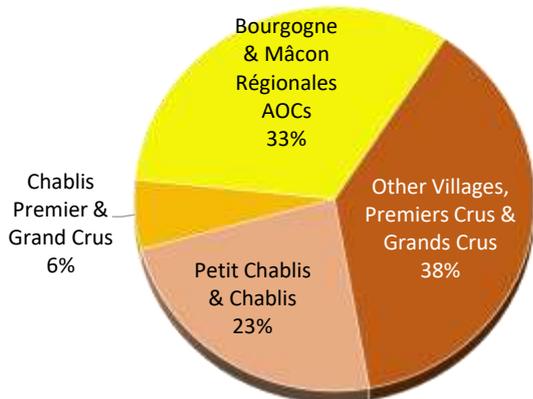
wines in terms of both volume and value. In the first 7 months of 2024, the UK accounted for 13.1% of Chablis wine exports by volume, with 1.67 million 75cl bottle equivalents shipped. Revenue for this period represented 12.9% of export value, totaling €17.5 million, behind the USA which is now in first place.

Petit Chablis and Chablis volumes dropped by 5.3% (1.34 million 75cl equivalents), and their value declined by 10.8% (€12.3 million). Chablis Premier Cru and Grand Cru experienced a smaller volume decrease of 2.1% (333,000 75cl equivalents), while value remained stable at €5.23 million over the same period.

Chablis: the leading Export among Bourgogne Wines

Volumes of white Bourgogne wines exported to the UK

7 months cumulative total - from January to July 2024
(source : Customs DEB&EMEDI + DAU)



Bourgogne white wines dominate UK sales, making up 77% of Bourgogne bottles exported to this market in the first 7 months of 2024—5.68 million bottles in total, worth €74 million.

These results are based on the reputation of Chablis wines, which account for 29% of the volume and 22% of export revenue for Bourgogne white wines.

According to a Wine Intelligence study, Chablis maintained its position in 2023 as the 9th most recognized and purchased wine region among regular wine consumers, unsurprising in a country with a strong preference for Chardonnay, with Bourgogne ranking 4th in this category.

More regular and involved wine consumers

In 2023, 28 million British adults consumed wine at least once a month. These regular consumers represent 53% of the adult population and nearly 75% of them consume wine weekly. Wine Intelligence reports that the share of regular consumers increased by 8.9% between 2019 and 2023, as did the share of British people consuming wine weekly (+9.1%).

This regular consumer base skews older, with 41% over 55 years, 26% between 40-54, and 24% aged 25-39. Young adults under 24 account for 8%. While medium-term consumption outlooks are subdued, increased engagement from younger consumers, growing numbers of regular drinkers (but with more moderate consumption), and an affinity for wine among the “Treaters” generation (young, value-focused consumers driven by pleasure and social experiences) partially offset this.

In the UK, 80% of still wine sales (excluding on-trade) occur at prices under £9.50 (€11). Another 17% are priced between £9.5 and £16.5 (€11-€19), with only 4% of sales above £16.5 (€19.2). The latter category is growing, unlike other price segments.

Supermarkets, led by Tesco and Sainsbury’s, are the primary purchasing channels for regular consumers, with 25% shopping online in 2023 (up from 21% in 2019). 38% also buy from hard discounters (Aldi, Lidl), and 8% order wines through delivery platforms (UberEats, Deliveroo).

Value growth and volume gains for Chablis in supermarkets

In the first 7 months of 2024, Bourgogne sold nearly 2.7 million bottles of still wine through UK supermarkets (-3.5% compared to 2023) for revenue of £31.85 million (+3.1% compared to 2023). Bourgogne white wines, which account for 70% of the region’s supermarket sales, saw a 4.8% decline in volume during this period (source: Circana-IRI UK). Chablis experienced a similar volume drop but increased its sales value by 1.5%.

The sale price of AOC Chablis, which comprises 83.4% of Chablis wine volume, rose by 2.2% in the first 7 months of the year, reaching £12.03 per bottle, with volume sold growing by 3% over the same period.

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(Sources: Customs – Circana-IRI UK – BIVB – Wine Intelligence/IWSR)

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