



Norway:

Good sales prospects for Chablis wines



Key figures for 2019 Chablis wines

Sales to the Vinmonopolet state monopoly

957 thousand bottles (down 4 % from 2018), for 175 million NOK (down 3,6 % on 2018)

by volume

- ▶ Chablis Premier Cru and Chablis Grand Cru: 7 %
- ▶ Petit Chablis and Chablis: 93 %

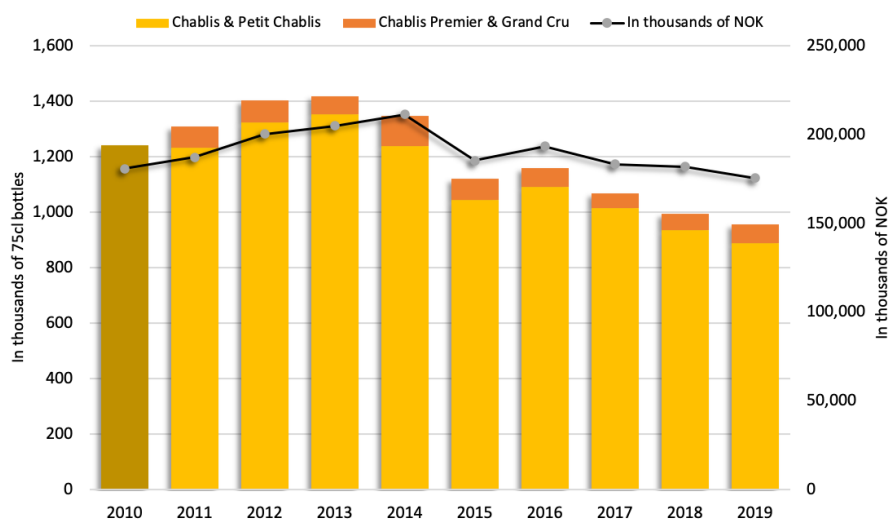
Wine imports to Norway maintained the same volume in 2019 (up 0.6% on 2018) and have changed very little over 5 years (up 1.4% over 5 years). However, sales have been increasing since 2013, as they reached a new record in 2019 (3.8 billion NOK), in particular due to the upmarket trend of imported wines, and a 16% increase in the average price in 5 years (up 31.5% in 10 years). The move upmarket was to the advantage of French wines which represent 21% of imported volumes, up 7.2% on the 2018 average import price.

Slight growth in bottle sales

Chablis wines accounted for 58% of sales of Bourgogne white wines through the Vinmonopolet state monopoly in 2019. Before 2013, sales showed constant growth. But the loss of market share caused by several small harvests has not been regained. Chablis wines dropped 4% in volume compared to 2018 and 3.6% in terms of revenue.

VINMONOPOLET sales - Chablis wines

(Source: Vinmonopolet/BIVB)



This decline was most reflected in sales of bag-in-box, that dropped 10% compared to 2018 (representing 40% of the volume of Chablis wines).

Bottle sales were however stable compared to 2018.

To put this situation into perspective, the volumes purchased by Norwegians in neighboring countries should also be taken into account.

Bourgogne wine sales dominated by white wines

Bourgogne wines have a high-end positioning in Vinmonopolet's overall offer.

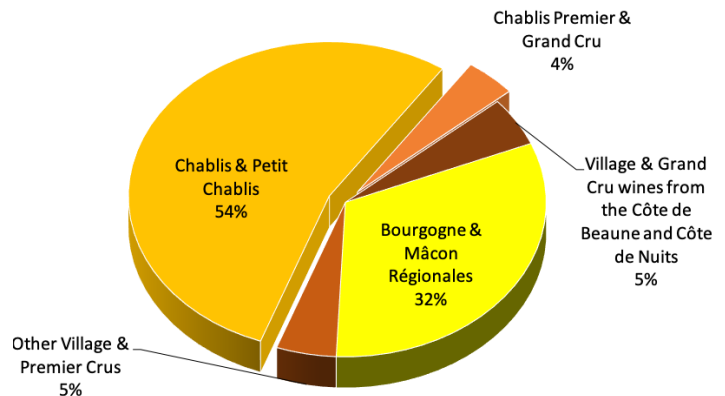
Sales of Bourgogne white wines in Norway (all types of containers) were up 7% in 2019, whereas bottle sales were up 12%.

Bourgogne wines accounted for 10% of total white wine sales in 75cl bottles through the Monopoly (a third of French white wine sales), with over half being made up of the Chablis appellations (58%).

Chablis wine sales break down by volume as follows:

- ▶ 53% for Chablis (up 5% on 2018)
- ▶ 35% for Petit Chablis (down 8% on 2018)
- ▶ 11% for Chablis Premier Cru (up 12% on 2018)
- ▶ 1% for Chablis Grand Cru (down 8% on 2018)

Market share of Chablis wines in terms of volumes of monopoly sales of white Bourgogne wines in 2019
(Source: Vinmonopolet/BIVB)



Norwegian consumption and basic trends

According to the research firm Wine Intelligence, there are 2.4 million regular wine consumers in Norway, which amounts to 59% of the adult population. Wine accounts for a major proportion of alcoholic drink consumption (81% in 2019): Norwegians bought 67.16 million liters of still wine through the Monopoly in 2019, which comes to 12.64 liters per inhabitant. This does not include wine bought in restaurants or purchased abroad.

The Monopoly accounts for 3/4 of the market for wines and spirits in Norway. Vinmonopolet has nearly 330 stores, nearly all of them self-service. In 2019, some basic trends were confirmed at the Monopoly, including a drop in sales of fortified wines (down 0.6% on 2018), a growth in sales of beer (up 6.5% on 2018) and alcohol-free products (up 8% in 2018). Sales of spirits are stable.

Although wine sales dipped 1.3% in the early part of the first semester of 2019, equivalent to a reduction of 500,000 liters in the "Wines and Spirits" categories, it went up 2.5% (or 1.1 million liters) following the long heat wave that led to unusually high sales in May and June 2019.

Red wine accounts for the largest share in monopoly sales by far, followed by white wine and sparkling wine. 2019's major trend was the sparkling wine craze, in particular "pet'nat". Beer and sparkling wine increased significantly throughout the year, even setting sales records in 2019 according to Communications Officer Jens Nordahl.

*Economic report produced by the Markets and Development department of the BIVB – March 2020
(Sources: GTA, VINMONOPOLET, Wine Intelligence - BIVB)*

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