



Mainland China: Strong growth in 2019 impacted by the COVID-19 crisis



Key figures in 2019 for Chablis wines in China

20th biggest market by revenue

22nd biggest market by volume

Exports: 115,800 bottles (up 15% on 2018), for **1.2 million euros** (up 28.7% on 2018)

by volume

- ▶ Petit Chablis and Chablis: 74%
- ▶ Chablis Premier Cru and Chablis Grand Cru: 26%

Dominated by French wine, the Chinese market remains strongly focused on red wines. In 2019, it accounted for 78% of Bourgogne wines exported to China. The dynamic red wine sales explain the rise in volumes of Bourgogne wines shipped to this territory (up 36% on 2018). However, the fall in volumes of Bourgogne white wines was not compensated by the impressive performance of Chablis wines.

In 2019, Bourgogne white wines accounted for 15% of the volume of still white French AOC wines shipped to China and 38% of the revenue.

Chablis wines on an upward trend in 2019

Exports of Chablis wines grew strongly in 2019:

- ▶ **Up 15% by volume**
- ▶ **Up 28.7% in terms of revenue**

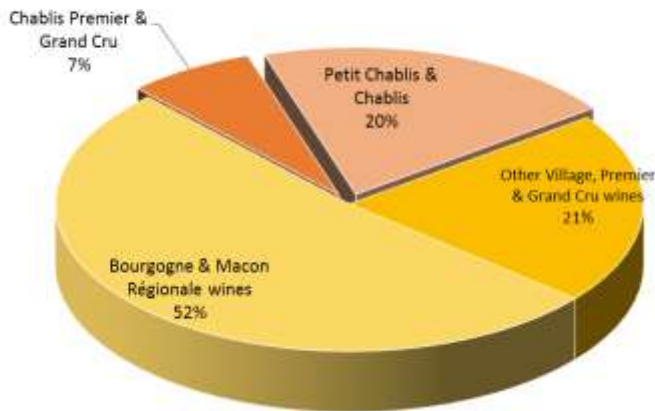
This growth was bolstered by a generous harvest in 2018. Revenues in 2019 showed the biggest increase over the past 10 years, rising €275,000 on 2018. Growth by volume was stronger for the Petit Chablis and Chablis appellations, up 17%, compared to an 11% increase for Chablis Premier Cru and Chablis Grand Cru. Figures for the first quarter of 2020 confirmed the good performance of Chablis wines on the Chinese market. However, the subsequent months showed a sharp dip in Chablis wine exports, down 17.3% by volume and 14.8% in terms of revenue for the first eight months of 2020 compared to the same period the previous year, impacted by the COVID-19 pandemic.



Chablis wines accounted for a quarter of Bourgogne white wines exported to China

Despite a slowdown in exports of Bourgogne white wines (down 4.9% on 2018), the growth in volumes shipped to

Exports of Chablis wines to China compared to all white Bourgogne exports
(Source: Customs DEB+DAU / BIVB)



China has been considerable over the past 10 years, going from 185,000 bottles in 2010 to 429,000 bottles in 2019, a positive sign in a market that is more inclined towards red wines.

Wine-lovers in the coastal cities have a growing appreciation for Bourgogne white wines, which make a good match for cuisine based on fish and seafood. Chablis wines accounted for 27% of exports of Bourgogne white wines by volume and 16% in terms of revenue in 2019; 20% of this volume involved the Petit Chablis and Chablis appellations, and 7% was for Chablis Premier Cru and Chablis Grand Cru.

Although Chablis wines fell back in the first eight months of 2020, their share of the revenue from

Bourgogne white wines grew by two points (18% over the period).

Bourgogne wines made progress on higher-value circuits

Bars and restaurant in Beijing (Survey of 200 establishments in 2019):

Bourgogne wines remained in the leading position in terms of their presence in restaurants, whereas other wine-producing territories saw their number of references fall. This was notably thanks to Chablis wines, which were top of the list with a 29% presence and a 3% share of the offer of Bourgogne white wines as part of the global offer of white wines (42% for all Bourgogne white wines as part of the global white wine offer). Among the 200 establishments, the Chablis AOC was the most widely distributed, present in 22% of restaurants (down 4 points), while Chablis Premier Cru was present in 10% of restaurants, with half as many references as the Chablis AOC (50 for Chablis compared to 26 for Chablis Premier Cru). Chablis Grand Cru was present in 6% of restaurants surveyed, (down one point, with 16 references), while the Petit Chablis appellation was present in 5% (down two points, 12 references).

Presence in specialist stores in Beijing (Survey of 30 establishments in 2019):

Bourgogne wines were in third place among wines of all origins, and with a 70% presence (up 4 points on 2018), they continued to gain ground on the leading French wine region in specialist wine stores. Bourgogne wines remained stable in terms of share of the offer (3% in 2019). The proportion of Chablis wines among the Bourgogne offer was also stable.

Among the 30 establishments surveyed, the Chablis appellation was the second most widely distributed with 13% (down one point on 2018) in terms of presence in specialist stores, with an average of eight references (up 33%).

Presence in e-commerce on the Chinese market (Survey of 50 websites in 2019):

Bourgogne were in fourth place in terms of presence on these sites, available on 68% of them in 2019 with a 2% share of the offer and an average of 21 references proposed per site. The Chablis AOC was in second place among Bourgogne white wines on the 50 sites surveyed, with three references per site. The Chablis appellation was the most widely distributed of the four levels from the Chablis region, present on 38% of sites with 38 references in total. Chablis Premier Cru was in second spot, with a presence on 16% of sites with 12 references. Chablis Grand Cru was in third place, present on 8% of sites with six references.

Economic report by the Markets and Development department of the BIVB – October 2020

(Sources: Customs - BIVB - MIBD Market)

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