



PURE CHABLIS

One grape
One region
One of a kind

Market report

Canada

Now Chablis wines' third biggest export market



Key figures for 2022 for Chablis wines in Canada

3rd biggest market in terms of revenue and by volume

**Exports: 1.85 million bottles (down 11% compared to 2021)
for 17.6 million euros (up 15% compared to 2021)**

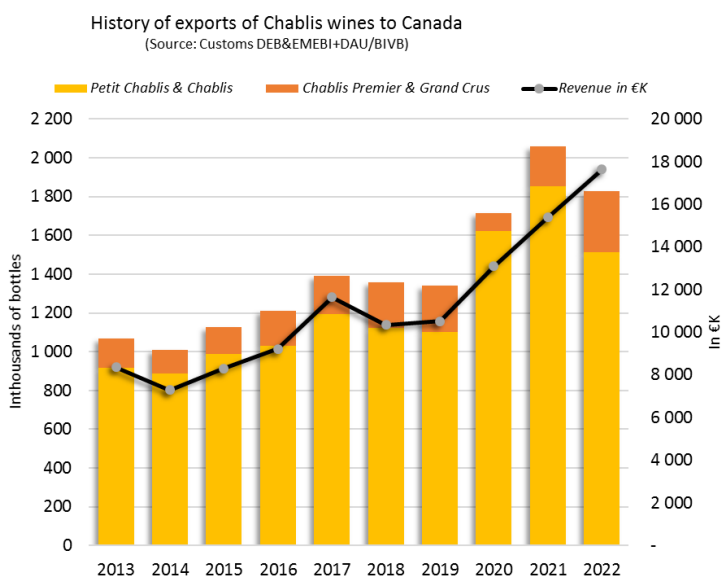
By volume

- ▶ Chablis Premier Cru and Chablis Grand Cru: 17%
- ▶ Petit Chablis and Chablis: 83%

In 2022, Canada moved up one place and became the third-biggest market by revenue and by volume for Chablis wines, ahead of Japan and behind the USA and the UK. This export market has been continually growing over the past decade and Canada now accounts for 8.9% of export revenue and 9.4% of export volumes from the Chablis region. Exports grew by 71% in terms of volume and by 111% by revenue between 2013 and 2022!

Record revenue for Chablis wines

After an exceptional year in 2021, exports to Canada returned to more normal growth in 2022. Although export volumes were down by 11%, they remained above the average over the previous five years:



- ▶ Up 10% for Petit Chablis and Chablis with 1.5 million bottles exported in 2022
- ▶ Up 62% for Chablis Premier and Grand Cru, with 314,000 bottles exported in 2022

On the other hand, revenue continued to grow, up 15%, even after an exceptional year in 2021:

- ▶ Up 5% for Petit Chablis and Chablis to €14 million
- ▶ Up 74% for Chablis Premier Cru and Chablis Grand Cru to €3.6 million

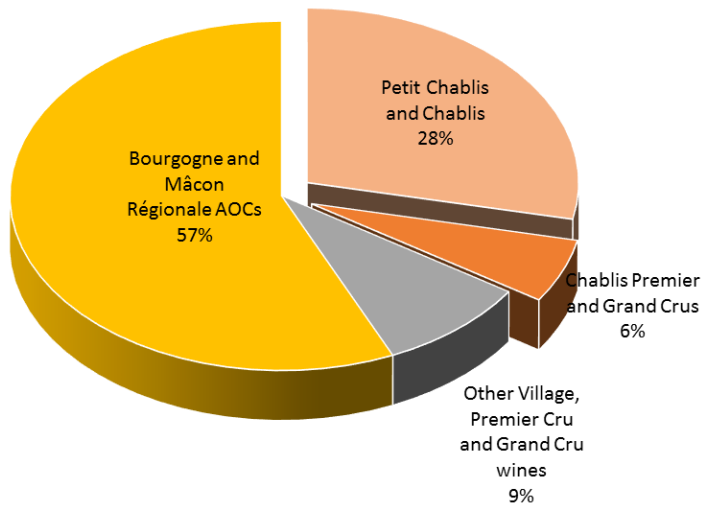
However, this growth may be tempered by a shift in the liquor monopolies' purchasing policies in an attempt to reduce their carbon footprint. The Société des Alcools du Québec

(SAQ) is expanding its environmental policy by encouraging its suppliers to reduce the amount of glass they use, to bottle locally, and to obtain environmental labels.

Market share for Chablis wines is growing among all exports of white Bourgogne wines

Volumes of white Bourgogne wines exported to Canada in 2022

(Source: Customs DEB&EMEBI+DAU / BIVB)



White wines remain, by far, the most exported of all Bourgogne wines to Canada: They account for two thirds of export volumes and 60% of revenue, which was up 11% compared to 2021.

Régionale Bourgogne AOC white wines alone account for one third of all Bourgogne wine exports, for 24% of revenue, followed by Chablis wines with 23% of volumes and 22% of revenue, and are up on figures for 2021.

Quebec: The sixth-biggest export market for Bourgogne wines

In Canada, wine accounts for 16% of all volumes of alcohol drunk, with more than 526 million liters consumed annually. It brings in CAD 7.85 billion or 32% of the country's total alcohol spend.

In 2021, two thirds of wine sales were shared evenly between Quebec and Ontario, far ahead of British Columbia (15%) and Alberta (9%).

Sales by the SAQ monopoly in the province of Quebec confirmed strong growth in sales of Bourgogne wines. This province alone consumed at least 70% of Bourgogne wines drunk in Canada, with 6 million bottles sold. This was up 5% on the previous year's record, for a turnover of CAD 147 million, and up 11% for the 12 months to end-March 2022.

Quebec is the sixth biggest export market for Bourgogne wines. Over the 12 months to end-March 2022, growth was driven by white wines, which were up 4.6%, accounting for 72% of sales of Bourgogne wines. The top three AOCs were Bourgogne Aligoté (1.558 million bottles sold), Chablis (918,013 bottles sold, up 11% compared to the 12 months to end-March 2021 and up 21% in terms of market share), Petit Chablis (145,491 bottles, up 17% compared to the 12 months to end-March 2021 and up 3% in terms of market share) and Bourgogne Blanc (730,258 bottles sold).

For the nine months from April to December 2022, sales of Bourgogne wines were down 22% compared to the same period in 2021, after almost uninterrupted growth for years. This drop equates to some 1.1 million bottles in nine months. The three AOCs that account for most volumes sold by the SAQ are in decline: Bourgogne Aligoté (down 26%), Chablis (553,000 bottles, down 31% and a 20% fall in market share) and Bourgogne Blanc (down 22%). Chablis Premier Cru was the only Chablis AOC to see sales rise by volume during that time (up 37%) and in terms of revenue (up 50%).

In Ontario, sales of Burgundy wines grew 21.8% by volume, equating to 200,000 additional bottles and by 22.6% in terms of revenue over the 12 months to the end of March 2021. They reached 1.085 million bottles for CAD 34.4 million during the period. Regional appellations still represented half of all still Bourgogne wine exported. White wines showed growth and were up 19% by volume, driven by *Régionale* Bourgogne appellations, Chablis (195,576 bottles, up 29.7% and up 34% in terms of market share), Petit Chablis (52,164 bottles, up 1.6% and 9% in terms of market share) and *Villages* appellations from the Mâconnais

English-speaking consumers that are younger than the French-speakers

In 2022, 15.9 million Canadians said they drank wine regularly, at least once a month. They represent 52% of the adult population of Canada, and 73% of them said they drink wine every week. According to Wine Intelligence, the number of regular drinkers fell by 20% between 2017 and 2022, and the number of Canadians who drink wine weekly was down 19%.

Within this population, English-speaking drinkers skewed slightly younger than French-speaking ones, with 60% of regular drinkers aged 25-54, compared to 54% of French speakers.

The 2,000 regular drinkers surveyed said their preferred alcoholic beverage was red wine, followed by white wine and, in third place, beer. This ranking did not change between 2019 and 2022, but the respondents were nonetheless losing interest in them. The only drink in the top 15 that gained in interest was Prosecco.

Wine drinking in restaurants and bars in 2022 was relatively stable and has been so since 2019. Regular drinkers aged between 25-39 bought the most wine, ahead of the 19-24 age group.

Market report compiled by the Markets and Development arm of the BIVB – March 2023

(Sources: Customs DEB&EMEBIup DAU - BIVB - SAQ - LCBO [hors CHR] - Wine Intelligence)

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