



PURE CHABLIS

*One grape
One region
One of a kind*

Market report

Japan

A shrinking market still faithful to Chablis



Key figures for 2022 for Chablis wines in Japan

4th biggest market in terms of revenue

5th biggest by volume

**Exports: 1.56 million bottles (down 34% compared to 2021),
for 17.49 million euros (down 12% compared to 2021)**

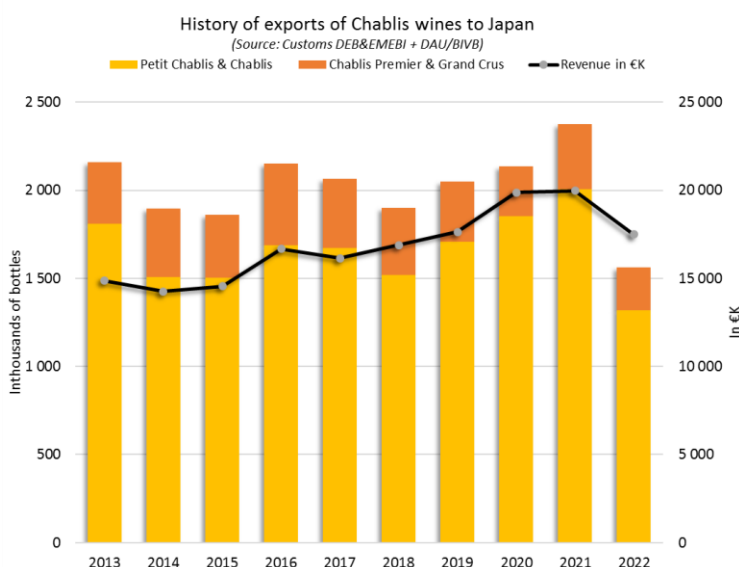
By volume

- ▶ Chablis Premier Cru and Chablis Grand Cru: 16%
- ▶ Petit Chablis and Chablis: 84%

As the world's third largest economy after the US and China, Japan had a complicated year in 2022 from an economic perspective. A 7th wave of Covid, the Russian invasion of Ukraine and the weakness of the yen against the dollar kept inflation a reality for consumers who did not see their incomes increase.

Bourgogne wines enjoy a genuine aura in Japan, a country whose culture, taste and values correspond to those of the Bourgogne region. In 2022, white Bourgogne wines accounted for one third of the volume of French white wines exported to Japan, and more than half of the revenue. Some 40% of these volumes exported to Japan come from Chablis.

Exports falling due to low stocks



Between 2018-2021, Chablis wines saw strong growth in Japan. But exports in 2022 were hit by a lack of wine from the 2021 vintage that slowed consumption and led to a rise in the average age of regular drinkers. As a result, exports fell by 34% by volume in 2022 compared to 2021, and by 12% in terms of revenue, equal to 2.5 million euros. All Chablis appellations were affected:

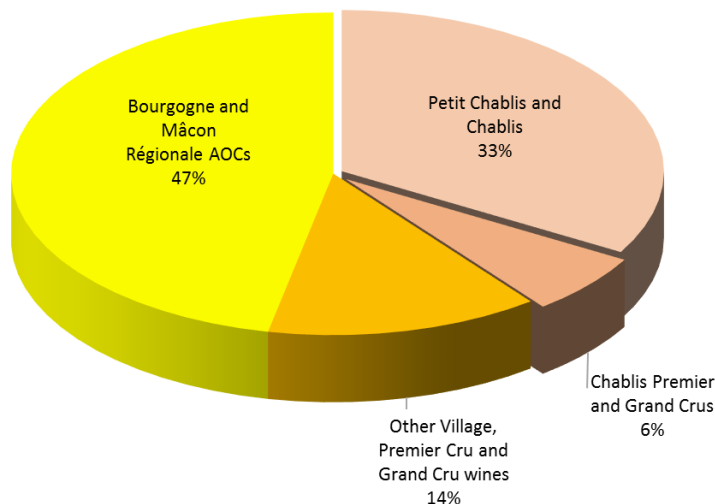
- ▶ Petit Chablis and Chablis were down 34% by volume and 14% in terms of revenue
- ▶ Chablis Premier Cru and Chablis Grand Cru fell 34% by volume and 5% in terms of revenue.

Chablis, a must-drink Bourgogne wine for the Japanese

Of all Bourgogne wine exports, Chablis wines enjoyed a market share of 22% by volume (the third leading AOC group for sales to that country) and 13% in terms of revenue in 2022.

Volumes of white Bourgogne wines exported to Japan in 2022

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



Exports of white Bourgogne wines have always had an important place for this market, fluctuating between 54-60% of volumes exported over the last decade.

Chablis wines also make a significant contribution to white wine exports from the Bourgogne region to Japan, accounting for 40% of volumes.

According to a 2022 study by Wine Intelligence, Chablis sits in 9th place in terms of the most popular wine-producing regions in Japan. This is perhaps unsurprising in a country that loves Chardonnay (the leading varietal) and where the Bourgogne winegrowing region is the fourth most popular.

Regular wine drinkers are growing increasingly older

In 2022, 26.7 million Japanese said they drank wine regularly; at least once a month. They represent 26% of the adult population, and two thirds of them said they drink wine on a weekly basis. According to Wine Intelligence, regular drinkers declined by 12% between 2018 and 2022.

The population is an ageing one: 65% were aged 55 and over in 2022, compared to 49% in 2018. Younger regular wine drinkers aged between 20-39 only accounted for 14% in 2022, compared to 27% in 2018.

The over-55s said they were less familiar with wine than with other consumer products. Younger drinkers are more involved with the notion of wine drinking, showed great interest in it, and felt more informed than older people thanks to their ease with the internet.

Of the 1,000 regular drinkers questioned, their preferred drink was red wine, followed by beer, with white wine in third place. Between 2018-2022, this ranking stayed the same, although drinks such as sake and craft beer were growing in popularity.

Hypermarkets and supermarkets remained the most popular places for buying wine in Japan, where almost half those questioned said they had bought wine during the previous six months. Over the last five years, purchases in wine stores have remained stable while supermarket sales have slowed.

Wine drinking in restaurants, pubs, and bars has remained stable over the past five years. It is no surprise that it was regular wine drinkers aged 40-54 who ensured a return to almost normal levels of consumption. Younger people aged 20-34 have also helped, much more than those aged 55 and over.

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

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

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