



PURE CHABLIS

One grape
One region
One of a kind

Market Report

Japan

The last two harvests are helping Chablis make a comeback in the Japanese market

2023 key figures for Chablis wines in Japan

3rd market by value
4th largest market by volume

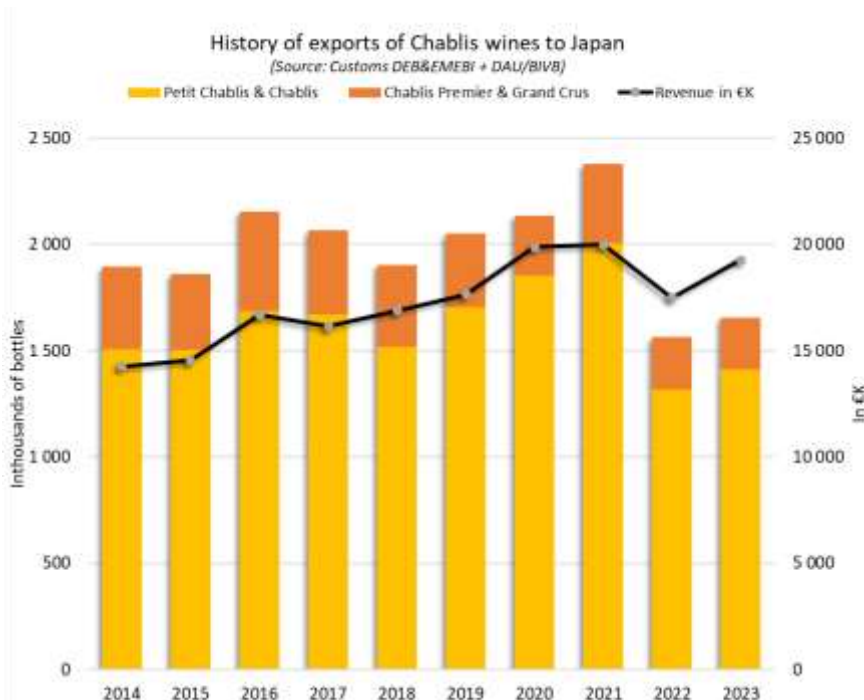
Exports: 1.65 million bottles (+5,8% / 2022), sales of 19.2 million euros (+9.8% / 2022)

Of which by volume ► Chablis Premier Cru and Chablis Grand Cru: 15%
► Petit Chablis and Chablis : 85%

Japan has conceded its position as the world's third-largest economy to Germany. There are a number of reasons for this, such as the fall in the Japanese currency, but it is primarily linked to the decline in demographics, with nearly one million fewer inhabitants annually.

Bourgogne wines enjoy a unique standing in Japan, a country whose culture, taste and values match those of the people of Bourgogne. In 2023, Bourgogne white wines represented 45% of the volume of French appellation white wines exported to Japan, and more than 68% of their sales. Chablis accounted for 45% of the volume of Bourgogne white wines shipped to Japan.

Exports benefit from available volumes

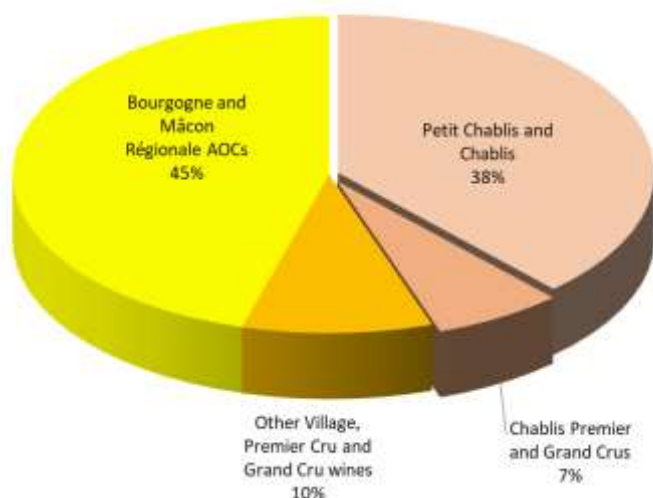


After a very challenging 2022 in this market, Chablis wines are experiencing renewed interest from the Japanese. Exports in 2023 were boosted by the volume of wine available thanks to the last two successful harvests. However, export volumes in 2023 were still well below the average for the last 5 years (down 22% by volume). Within this context, all Chablis appellations are showing growth:

- +7% by volume and +9% by value for Petit Chablis and Chablis
- +1% by volume and +12% by value for Chablis Premier Cru and Chablis Grand Cru.

Chablis is an essential part of the Bourgogne wine scene in Japan

Volumes of white Bourgogne wines exported to Japan in 2023
(Source: Customs DEB&EMEBI+DAU/BIVB)



In 2023, Chablis wines represented 26% of Bourgogne's total exports across all colors by volume (the third most exported AOC group to Japan), and 14% by value.

White wine exports from Bourgogne have always played an important role in this market. Chablis wines greatly contribute to the prominence of Bourgogne white wines in Japan, representing 45% of the white wine volumes shipped to Japan from Bourgogne.

According to a study by Wine Intelligence in 2023, Chablis wines rank 9th among the most purchased vineyards in Japan. This comes as no surprise in a country which appreciates Chardonnay (the leading white grape variety) and ranks Bourgogne 3rd in this classification.

The segment of regular wine drinkers is getting older and older

In 2023, 26.3 million Japanese drink wine at least once a month (regularly). They represent 25% of the adult population, and almost 2/3 of them drink wine every week. According to Wine Intelligence, the share of these regular consumers fell by 12.3% between 2018 and 2023, but growth resumed between 2021 and 2023 (+8.7% of regular consumers)

This demographic is aging, with 55% over the age of 55 in 2023 compared to 49% in 2018. Young regular wine drinkers, aged 20-34, accounted for just 15% in 2023 compared with 22% in 2018.

While the over-59s say they know less about wine than other consumer products, younger people tend to be more involved and interested in wine, and feel better informed than their elders, thanks to the ease with which they can find information on the Internet.

Among 1,000 regular consumers who took part in a survey, the leading alcoholic beverage consumed was red wine, followed by beer and then white wine. Between 2018 and 2023, these rankings remained constant. However, beverages such as sake, whisky and craft beer are gaining in importance.

In Japan, the preferred channels for buying wine are still hypermarkets and supermarkets, where almost half of those questioned said they had bought wine in the last 6 months. Over the past 5 years, purchases from wine shops have remained stable, but those from supermarkets are slowing down.

Wine consumption in restaurants, pubs and bars has remained stable over the past 6 years. The 27-42 and over-59 age groups are the biggest consumers of wine in restaurants. Unsurprisingly, millennials (aged 27-42) consume the most wine in bars and pubs.

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

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