



PURE CHABLIS

*One grape
One region
One of a kind*

Market Report

United States

A Confirmed Leading Export Market Position



2024 Key Figures for Chablis Wines in the United States

The number one export market by volume and value

Exports: 3.87 million bottles, an increase of 28.8% compared to 2023, generating 47.1 million euros, an increase of 27.7% compared to 2023

Breakdown by volume ▶ Chablis Premier Cru and Chablis Grand Cru: 14%
▶ Petit Chablis and Chablis : 86%

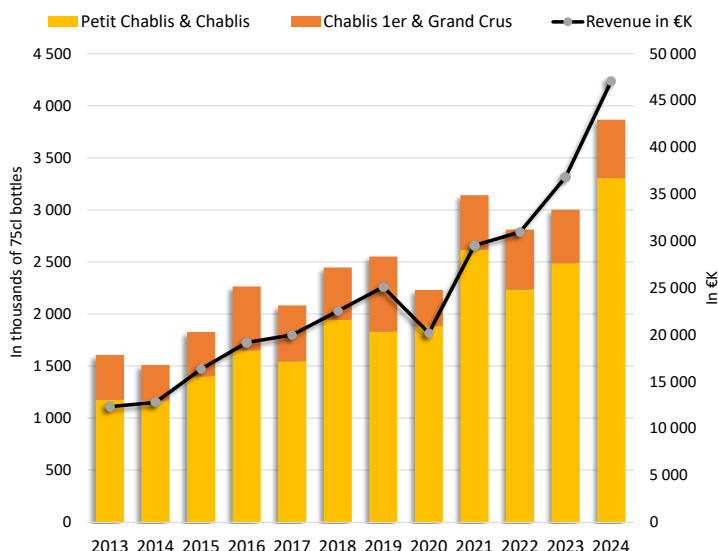
In 2024, Bourgogne wines accounted for 12% of the volume of French AOC wines exported to the United States, representing 17.2% of the revenue. Bourgogne white wines made up 36.3% of the volume of French AOC white wines exported.

U.S. wine consumption was estimated at more than 4.2 billion bottles in 2022, accounting for 10% of all alcoholic beverages consumed. Projections for 2027 foresee a slowdown in overall wine consumption (IWSR 2024), though French wine consumption is expected to continue growing, with a forecast increase of 1.6% between 2022 and 2027. In 2024, Chablis wines found new drivers of growth, as evidenced by their performance. However, this growth should be put into perspective, as it is likely also due to anticipated imports in the final quarter of the year in response to the risk of higher customs duties in 2025, along with expected shortages in available volumes for the 2024 vintage.

Growth Accelerated at the End of 2024

Chablis wines exports to the USA

Source (Customs DEB&EMEBI and DAU / BIVB)



2024 was a record-breaking year for Chablis wines in the U.S., which maintained its position as the leading export market in both volume and value.

▶ Revenue rose by 27.7% compared to 2023, with all 4 AOCs benefiting from this growth.

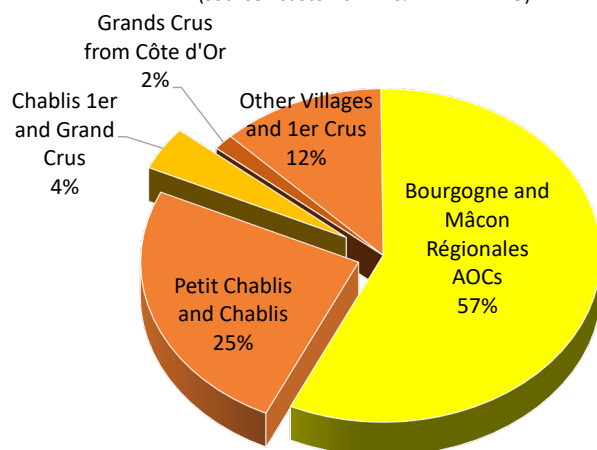
▶ The number of bottles shipped increased by 28.8% compared to 2023, driven by the Petit Chablis and Chablis duo, which set a new record with nearly 3.8 million bottles shipped in 2024.

The United States alone accounted for nearly 20% of the revenue and 17% of the volume of Chablis wines exported in 2024!

Chablis: Among the Most Popular Bourgogne White Wines

Share of Chablis wines in Bourgogne white wines exports

(source : customs DEB&EMEDI + DAU)



In 2024, Bourgogne white wines accounted for 63% of the total exported volume to the United States, representing 53% of the revenue (+25.3% compared to 2023).

Chablis AOCs, accounting for 29% of Bourgogne white wine exports by volume, rank just behind Bourgogne *Régionale* white AOCs, which represented 35% of volumes shipped. They contributed 24% of the revenue from Bourgogne white wine exports.

Today, informed consumers and wine enthusiasts increasingly favor authentic French Chablis, reinforcing its presence in the U.S. market, now the leading export destination for Chablis wines.

This trend continued in 2024, with Petit Chablis and Chablis volumes rising by 32.9% compared to 2023. In value, the increase reached 28.4%, a gain of 7.9 million euros, bringing total revenue to 36 million euros.

Chablis in Line with the Evolution of the U.S. Market

In 2024, the On-Trade market (restaurants, bars, hotels) continued its recovery after being deeply impacted by the COVID-19 pandemic, accounting for approximately 15-20% of total wine sales in the country.

- ▶ Chablis wines, due to their appeal, contributed to this recovery, as the growth in wine purchases in restaurants and wine bars primarily occurred at the price levels where they are most present, from Ultra-premium to Prestige. These segments have grown from 17% of wine purchases in 2019 to over 25% in 2023.

The *Off-Trade* market remained dominant in the country (80-85% of volumes), but it no longer showed the same momentum since COVID-related restrictions were lifted. Only more traditional wine retail outlets (liquor stores, super stores, and wine shops) saw higher foot traffic in 2023 compared to 2019. This level of traffic partly explains the growth in Chablis wine exports to the U.S., as the wines are primarily distributed through these channels.

Chablis wines are available for sale in most U.S. states. However, the majority of the wine sales were concentrated in the six states that account for half of the country's total wine consumption: California, Florida, New York, Texas, New Jersey, and Illinois.

New York State has a deeply rooted gastronomic culture. It is therefore only natural that Chablis wines hold a privileged place there. In this state, Bourgogne offers consumers the most extensive selection within the French wine offerings, representing 25% of the French vineyards' selection available online.

- ▶ Bourgogne white wines, in first place, account for 46% of the French offer (July 2024), with the main selections being the AOC of the Côte de Beaune (32% of the Bourgogne offer), Chablis wines (23% of the Bourgogne offer), and Bourgogne *Régionale* appellations (15% of the Bourgogne offer).

- ▶ The 23% of Chablis wines within the Bourgogne white wine selection is distributed as follows: 10% for Chablis, 7% for Chablis 1er Cru, 4% for Chablis Grand Cru, and 2% for Petit Chablis.

Located in the heart of the Midwest, the state of Illinois is renowned for the international influence of the city of Chicago, the third most populous city in the U.S. and considered the cultural hub of the country. Major American companies are based in this city, which creates a high level of culinary, artistic, and cultural offerings in the state. As of July 2024, Bourgogne ranked as the second most represented foreign wine region in Illinois (excluding U.S. wines), accounting for 13% of the total wine listings online.

It also stood as one of the most widely available French wine regions, representing 21% of all French wines listed online.

- ▶ Bourgogne white wines hold the top spot, accounting for 41% of the total French white wine offering, with the three main categories being wines from the Côte de Beaune (34%), Chablis wines (25%), and Bourgogne *Régionale* wines (13%) in July 2024.
- ▶ Chablis wines make up 25% of the Bourgogne white wine offering, broken down as follows: 11% for Chablis, 6.3% for Chablis 1er Cru, 5.7% for Chablis Grand Cru, and 2% for Petit Chablis.

Economic report written by the Markets and Development Unit - BIVB –February 2025

(sources: Customs DEB&EMEBI+DAU - IWSR – Wine Market Council – Ministry of Agriculture and Food Sovereignty – Wine Searcher - BIVB)

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