



# PURE CHABLIS

One grape  
One region  
One of a kind

## Market Report

### Canada

## The 3rd Largest Export Market for Chablis Wines

### 2024 Key Figures for Chablis Wines in Canada

3rd largest market by volume

**Exports: 2.32 million bottles (+36.4% compared to 2023) for 21.6 million euros (+24.9% compared to 2023)**

Breakdown by volume

- ▶ Chablis Premier Cru and Chablis Grand Cru: 10%
- ▶ Petit Chablis and Chablis: 90%

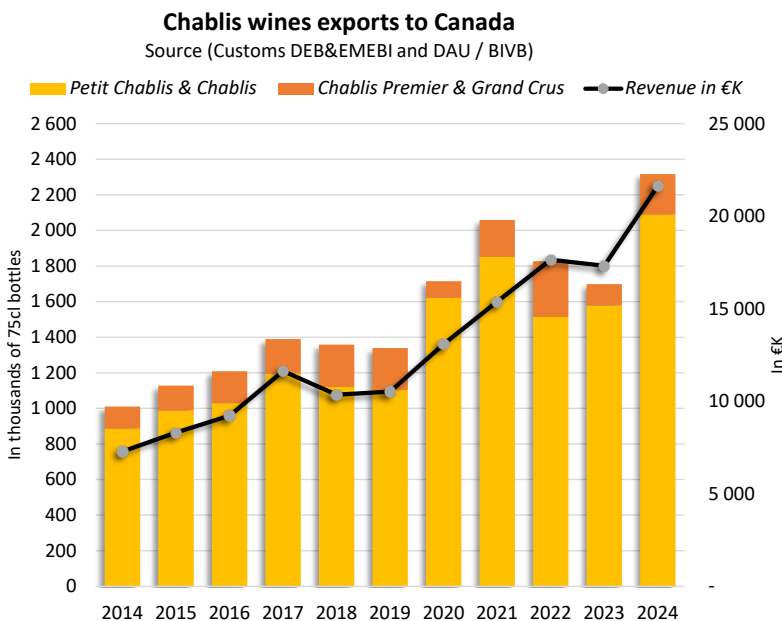
In 2024, Bourgogne wines accounted for 17.3% of the volume of French AOC wines exported to Canada, representing 21.5% of the revenue.

Bourgogne white wines made up 42.2% of the exported volumes of French AOC white wines.

Although the adult population in Canada continues to grow, the number of regular wine consumers is decreasing (down by 1.4 million monthly consumers in 2023 compared to 2019). The five-year outlook does not foresee a reversal of this trend (*IWSR 2024*).

Wine is the only beverage category in 2024 to have seen a decline in market share. Wine sales have reached their lowest level since 2010-2011, with 500 million liters of wine sold (*StatCan 2024*). Among French wine regions, Bourgogne — particularly Chablis — stands out as an exception, returning to growth.

### New Records in Volume and Revenue



After two years of slowdown, Chablis wines are regaining market share in Canada amid a decline in overall wine consumption. This momentum is driven by Petit Chablis and Chablis, which together posted an additional 510,046 bottles, with revenue up by 3.356 million euros, representing a 32.3% increase in volume and a 22.5% rise in revenue in 2024 compared to 2023.

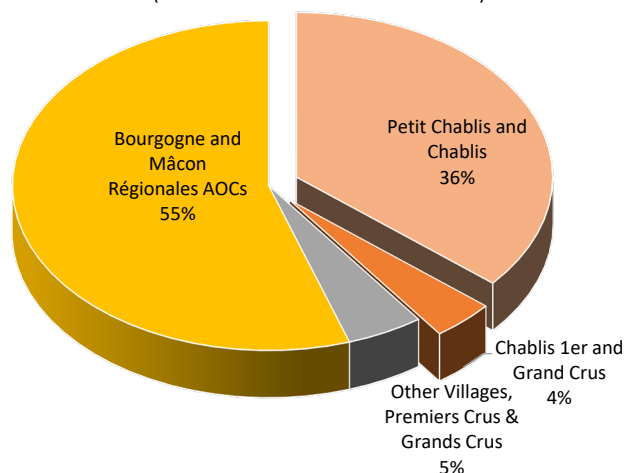
Chablis Premier and Grand Crus are bouncing back with even stronger growth after a lackluster 2023. In 2024, they posted a 91% increase in volume shipped and a 40.2% rise in revenue compared to 2023.

In 2024, Chablis wines surpassed 21 million euros in revenue in Canada, with over 2.3 million bottles shipped. The country overtook Japan to claim third place among export markets for Chablis, both in value and volume.

## Chablis Wines Gain Ground Within Bourgogne White Wines

### Share of Chablis wines in Bourgogne white wines exports

(source : customs DEB&EMEDI + DAU)



White wines accounted for 72% of Bourgogne wine exports, with a steadily increasing market share. Their revenue also showed continuous growth. Wines from the Bourgogne *Régionale* AOC represented 50% of Bourgogne white wine export volumes and 43% of their value, up 31.9% in volume and 53.1% in revenue in 2024 compared to 2023.

Chablis wines followed closely, accounting for 40% of the volume and 43% of the value.

Wines from the Mâcon *Régionale* AOCs (Mâcon, Mâcon-Villages, and Mâcon +) ranked third, though far behind.

## Quebec, The 6th Largest Export Market for Chablis Wines!

According to figures from the *Société des Alcools du Québec* (SAQ Monopoly), for the 12-month period from April 2023 to March 2024, **the province alone accounts for 69% of Bourgogne wines and 60% of Chablis wines exported to Canada!** Quebec is by far the most important market in Canada. This province imports more Chablis wines than Belgium and Germany combined, making it the 6th largest export market!

After a 20% decline in the previous year, Bourgogne wine sales in Quebec returned to growth, with the equivalent of over 5.5 million bottles sold in the latest available full fiscal year (April 2023 to March 2024). This volume is significantly higher than sales before the Covid-19 pandemic. Furthermore, the revenue for this period reached a record, totaling CAD 152.7 million (+15.5% over the 12-month period ending in March 2024 compared to the 12 months ending in March 2023).

The SAQ predominantly sells white wines from Bourgogne, and their share continues to grow in this most recent fiscal year (73% of the volumes from the region and 69% of its value).

- **White wines from Bourgogne** have regained momentum thanks to the excellent harvests of 2022 and 2023, with a growth of 17.5% in the most recent fiscal year of the SAQ (12-month total from March 2023 to March 2024 compared to the 12-month total from March 2022 to March 2023), with sales reaching the equivalent of 4 million bottles for a revenue of 105.9 million CAD.

The wines of Chablis make up the second-largest group of white Bourgogne AOCs at the SAQ, with 28% of their volumes and 35% of their revenue (+19% in volume and +18% in value, 12-month total from March 2023 to March 2024 compared to the 12-month total from March 2022 to March 2023).

- +30.8% in volume for the Chablis AOC (78% of Chablis wines volumes) for 27.3 million CAD (+32.4%, 12-month cumulative to the end of March 2024 compared to the 12-month cumulative to the end of March 2023),
- +6% in volume for the Petit Chablis AOC (11% of Chablis wines volumes) for 3.27 million CAD (+10%, 12-month cumulative to the end of March 2024 compared to the 12-month cumulative to the end of March 2023).

Pending sales data through the end of March 2025, the first figures for the full year of 2024 confirm these volume increases: +17.2% for the Chablis AOC, +25.8% for the Petit Chablis AOC. And revenue in 2024 reached a new record with 40.3 million CAD (+15% compared to 2023).

## Ontario: Chablis Wines Most Prominent in the White Wine Offerings from Bourgogne

In contrast to the SAQ, the overall sales of Bourgogne wines at the LCBO (Ontario's Monopoly) slowed down for the second consecutive year as of March 2024 (-12% in volume compared to the 12-month cumulative total through March 2023). This decline affected all sales at the monopoly, whether they were imported wines (66% of volumes) or local wines.

For Bourgogne wines:

- ▶ A total of 729,097 bottles were sold across all colors, reaching a revenue of 26.9 million CAD over the 12-month period ending March 2024.
- ▶ White wines remained the majority, accounting for 60% of the region's sales (438,000 bottles) and generating 15.7 million CAD in revenue.

Within this category, three groups of appellations dominated the market. By far the largest, wines from Chablis accounted for 52% of the volumes sold, followed by wines from Bourgogne *Régionale* AOCs at 29% and wines from the Mâcon *Régionale* AOCs at 12%.

Only the sales of Chablis wines experienced double gains, with a 9.5% increase in volume and a 5.7% increase in revenue over the last period (compared to the 12-month cumulative period ending March 2023). This includes a 6.3% volume increase for Chablis AOC, which represents 85% of the Chablis wine volumes, and a 7.3% increase in revenue (cumulative 12 months to March 2024 compared to the cumulative 12 months to March 2023).

Nearly 461 Bourgogne wine references were marketed during the studied period. The top 10 bestsellers account for 62% of the total volume of Bourgogne wines sold, while the top 25 account for 88%. The Chablis appellation holds 7 references, making it the most represented Bourgogne appellation in the top 25.

## Nearly 112,000 Bottles of Chablis Wines Sold in British Columbia

During the last fiscal year ending in March 2024 (12-month cumulative), the sales of Bourgogne wines by the monopoly as a wholesaler decreased by -7.1% in volume compared to the previous year, with 298,000 bottles sold, generating 14.2 million CAD (-3.5% compared to the 12-month cumulative to the end of March 2023). Despite two years of decline, these sales remain significantly above their pre-pandemic levels (+12.3% in volume and +25.7% in value compared to March 2020).

- ▶ White wines are the majority (63% of the volume) and continue to benefit from the consumption boom observed during the COVID-19 pandemic. Despite a slight decline in volume compared to the 12-month cumulative period ending in March 2023 (-4.8%), they generated more revenue (+2.2%, 12-month cumulative to the end of March 2024 compared to the 12-month cumulative to the end of March 2023). The majority of these are Chablis wines, with 112,000 bottles sold (60% of the white wines), marking a 1.7% increase (+6.1% in value compared to the 12-month cumulative to the end of March 2023). The Chablis AOC (48% of the white wines) is the top-selling AOC, with 64,000 bottles sold (+1.1%, 12-month cumulative to the end of March 2024 compared to the 12-month cumulative to the end of March 2023). The Petit Chablis AOC, on the other hand, represents 28,000 bottles sold (+7.3% compared to the 12-month cumulative to the end of March 2023).

In the 12-month period ending in March 2024, 262 references of Bourgogne wines were marketed: 54% were white Bourgogne wines, 45% were red wines, and 1% were Crémant de Bourgogne references.

**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)

### Contact:

Françoise Roure – Marketing/Communication Manager BIVB-Chablis  
francoise.roure@bivb.com Tel: + 33 3 86 42 42 22 – Fax: + 33 3 86 42 80 16