



PURE CHABLIS

One grape
One region
One of a kind

Market Report

Japan

The Decline in Wine Consumption Also Affects Chablis



Key Figures for Chablis Wines in Japan—2024

4th largest market by value
5th largest market by volume

Exports: 1.47 million bottles (-11.1% compared to 2023), generating €16.9 million (-12.5% compared to 2023).

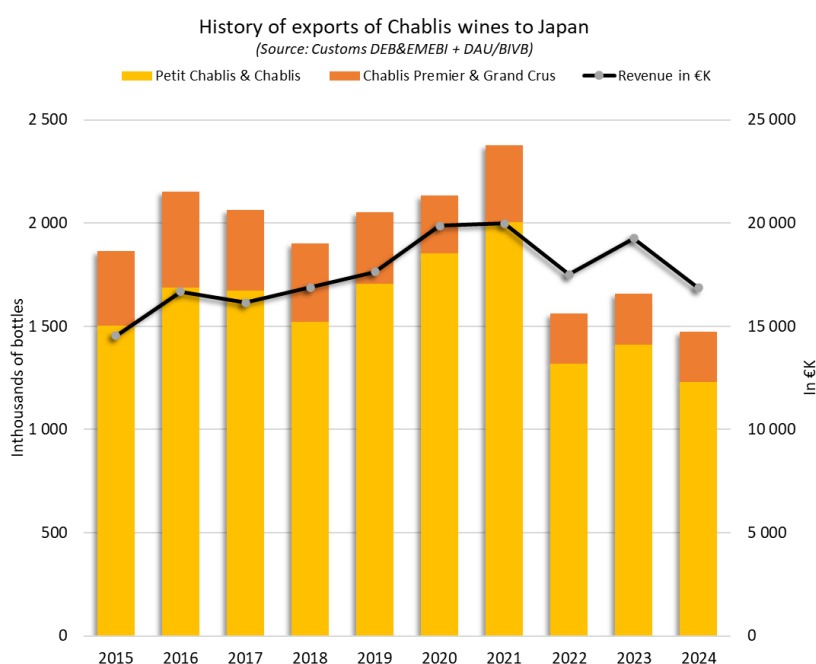
Breakdown by volume ▶ Chablis Premier Cru and Chablis Grand Cru: 16%
▶ Petit Chablis and Chablis: 84%

In 2024, Bourgogne white wines accounted for 42.4% of the total volume of French AOC white wines exported to Japan, generating 69.5% of the total revenue. Chablis wines alone represented 17% of the exported volume of French AOC white wines.

The number of regular wine consumers in Japan has fallen to 24.1 million. This decline is primarily due to a shrinking adult population, which decreased by 0.5 million between 2021 and 2024. The five-year outlook confirms this trend, as Japan's birth rate has reached an all-time low.

Wine has experienced the largest volume decline among all beverage categories, with sales down 4.3% between 2018 and 2023. Projections remain unfavorable, with an estimated additional drop of 2.3% by 2028.

Exports Decline, but Japan Remains a Top 5 Market



Chablis wines have not been spared from Japan's declining wine consumption. Exports to this market have reached their lowest volume in a decade:

- ▶ **Petit Chablis and Chablis:** 1.2 million bottles, down 13% between 2023 and 2024.
- ▶ **Chablis Premier Cru and Chablis Grand Cru:** 242,000 bottles, down 12% in volume (2024/2023).

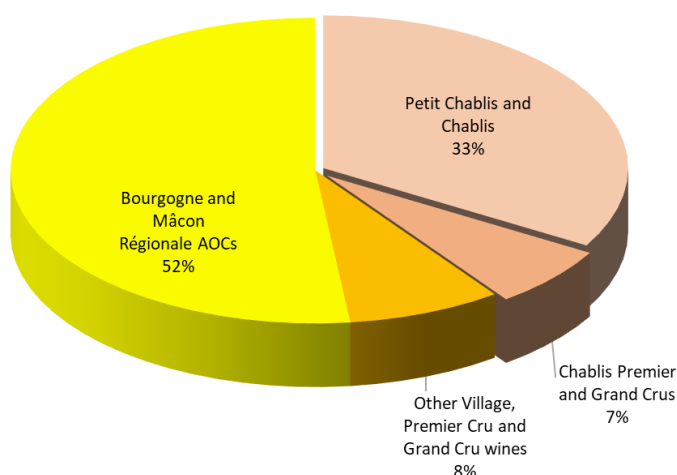
While revenue from Chablis Premier Cru and Chablis Grand Cru grew by 1% (2024/2023), this was not enough to offset the €2.4 million loss from Petit Chablis and Chablis.

As a result, Japan has lost its position as Chablis' third-largest export market by value but remains within the top five.

Chablis, an Essential Bourgogne Reference in Japan

Volumes of white Bourgogne wines exported to Japan in 2024

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



In 2024, Chablis wines represented 24% of the total volume of Bourgogne exports, making it the third most exported AOC in Japan, and 12% of the export value. Bourgogne white wines have always held a significant share in the Japanese market, with Chablis contributing greatly to this. In fact, Chablis accounts for 40% of all Bourgogne white wines exported to Japan.

According to an IWSR study in 2024, Chablis ranks as the 9th most purchased wine region in Japan. This is hardly surprising, considering Japan's appreciation for Chardonnay (the top white grape variety) and the fact that Bourgogne ranks 4th in this classification.

Favorable Market Trends for Chablis in Japan

In 2024, no aspect of wine purchasing and consumption in Japan has been left unaffected. The **On-trade** (restaurants, bars, hotels), which accounts for 21% of wine purchases, has seen a loss of almost 29 million bottles compared to 2018. **Off-trade**, representing 79% of wine purchases, has lost just under 17 million bottles, according to an IWSR survey in 2024.

The **On-trade** market remains an important venue, as the majority of still wines are consumed there, but without having returned to pre-pandemic levels. Under these conditions, Chablis wines are experiencing a decline in export volume; however, they maintain an enviable presence in restaurants, the most popular place in Japan where regular wine consumers report drinking wine. The rate of wine purchases in restaurants remained stable between 2021 and 2024, which helps Chablis wines maintain their presence in these establishments.

Growth prospects for 2028 are promising for this vineyard as the trend of drinking less but better intensifies, which favors the price points where Chablis wines are most present, from Super-premium (+0.74%/2028), to Ultra-premium (+2.18%/2028), and Prestige (+1.6%/2028).

The **Off-trade** market remains predominant in Japan (79% of volumes), but it no longer has the same momentum since the end of pandemic-related health restrictions. COVID-19 seems to have created a permanent change in habits, as wine purchases in supermarkets and other mass merchant channels are decreasing, by -4% and -12% respectively (2024/2021). Only more traditional wine retail establishments, liquor stores and online retailers, experienced higher patronage in 2024 compared to 2021.

With the declining number of older consumers in Japan, wine enthusiasts are drinking less red wine and more white wine than in 2021. This benefits Chablis wines, as white wines gained 4% more buyers in 2024, and wines made from the Chardonnay grape are the most successful among the top 5 most consumed grape varieties in Japan.

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(sources: Customs - BIVB – IWSR)

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