

Market Report

United Kingdom

Chablis Wines Affected by Weakened Purchasing Power

Key Figures for Chablis Wines in the United Kingdom – 2024

2nd Largest Market by Value and Volume



**Exports: 3.05 million bottles (-0.3% compared to 2023),
representing 30.4 million euros (-3.3% compared to 2023)**

Breakdown by volume

- ▶ Petit Chablis and Chablis: 80.5%
- ▶ Chablis Premier Cru and Chablis Grand Cru: 19.5%

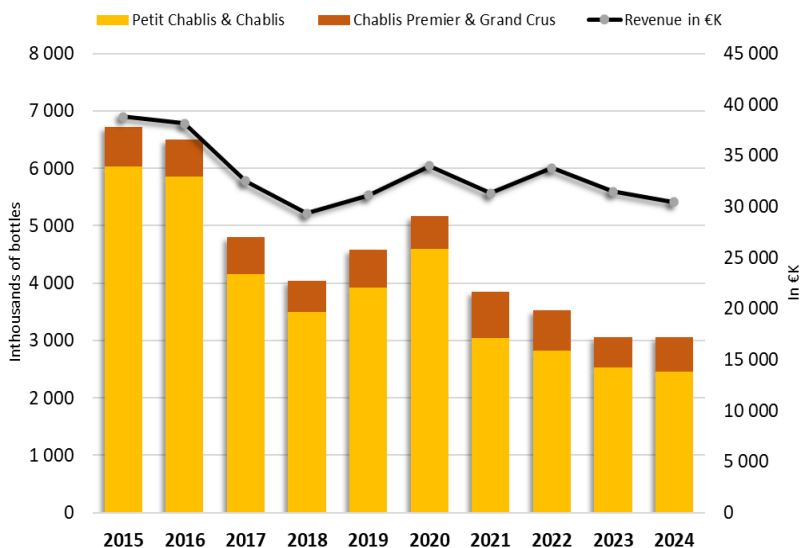
In 2024, white Bourgogne wines accounted for 37.6% of the total volume of French AOC white wines exported to the UK, generating 61.6% of the total revenue.

Chablis wines alone made up 11.5% of the volume of French AOC white wines exported to this market.

In the United Kingdom, the number of regular wine consumers declined to 26.8 million in 2024, with a loss of 1.7 million people who previously consumed wine at least once a month compared to 2022. More than one in four consumers reported drinking less wine in 2024 than the previous year, citing moderation and reduced purchasing power as the main reasons. This has led to a decline in sales volumes, a trend expected to continue in the coming years (IWSR 2024).

A Declining Market, but Still Significant for Chablis

History of exports of Chablis wines to the UK
Source: Customs DEB&EMEBI and DAU / BIVB



Despite losing its top position, the United Kingdom remains a key market for Chablis, accounting for 13.4% of export volumes and generating 13% of the vineyard's export revenue in 2024.

The decline in exports to the UK has been ongoing for about a decade, driven by multiple factors, including a shift towards more value-added distribution channels for Chablis wines and an increasing trend of direct exports to consumer markets, bypassing the UK as a historical hub.

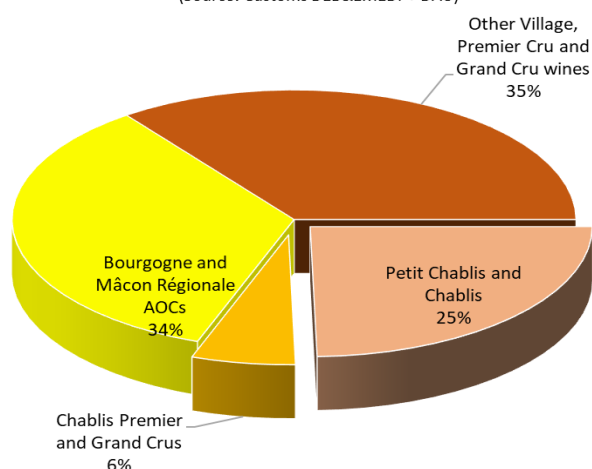
After a significant drop in 2023, Chablis Premier Cru and Chablis Grand Cru saw a rebound in both volume and value in 2024, with a 13.5% increase in volume (594,000 bottles exported) and a 7.8% rise in value (€8.3 million, compared to 2023).

For Petit Chablis and Chablis, the decline in export volumes observed since 2020 has slowed, with a 3.1% drop in 2024, compared to a 10.3% decline in 2023. A total of 2.45 million bottles were exported in 2024.

Bourgogne Exports Driven by Chablis Wines

Volumes of white Bourgogne wines exported to the UK in 2024

(Source: Customs DEB&EMEDI + DAU)



Bourgogne white wine sales continue to dominate the UK market, accounting for 75% of Bourgogne bottles shipped in 2024, nearly 10 million bottles, generating €134 million in revenue.

These strong results are largely driven by the renown of Chablis wines, which represent 31% of the volume and 23% of Bourgogne white wine export revenue.

According to an IWSR study, Chablis ranks 9th among the most recognized and purchased wine regions among regular wine consumers in 2024. This is hardly surprising in a country with a strong appreciation for Chardonnay, where Bourgogne holds the 4th position in the ranking.

Chablis: Aligned with Market Trends in the UK

No wine purchasing or consumption venue in the UK has been spared in 2024. The **On-trade** (restaurants, bars, hotels), which accounts for 9% of wine purchases, has lost nearly 68 million bottles compared to 2018, while the Off-trade, representing 91% of purchases, has seen a decline of over 83 million bottles (IWSR 2024).

Traditional dining establishments have yet to recover pre-pandemic consumption levels, largely due to inflation in recent years. Chablis wines, which are well-established in the restaurant sector, continue to see a decline in exports in 2024, though at a slower pace. This moderation in decline may be linked to a shift in consumption habits, with wine increasingly enjoyed in informal settings such as wine bars and pubs offering food.

This emerging consumption pattern is driven by young adults with high incomes, mostly in couples, who in 2024 represented:

- 28% of wine purchases (+3% compared to 2023)
- 38% of On-trade revenue, particularly in wine bars and pubs

Notably, this generation is the biggest consumer of Chablis wines—35% of respondents in this group reported drinking Chablis wines in 2024, compared to just 17% across all age groups.

In the **Off-trade**, baby boomers—who tend to have lower incomes but remain avid wine drinkers—dominate supermarket purchases.

- 83% of respondents in this generation buy wine in supermarkets
- 63% reported enjoying Chablis wines in 2024 (IWSR 2024)

Bourgogne sold 5.37 million bottles of still wine in supermarkets (+1.8% compared to 2023), generating £61 million in revenue (+6.2% compared to 2023). While Bourgogne white wine sales, which account for 70% of Bourgogne supermarket volumes, saw a slight decline of 0.97% in volume (CIRCANA-IRI UK), Chablis wine sales experienced a more pronounced drop of 4.9% in volume. However, this was offset by a 6.4% increase in retail price. Chablis AOC, which represents 85% of Chablis wine sales, gained market share, with sales reaching nearly 1.5 million bottles (+4.4% compared to 2023) and generating £18.38 million in revenue (+11.7% compared to 2023).

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

(sources: Customs – IRI-CIRCANA UK – BIVB –IWSR)

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