PURE CHABLIS

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One region
One of a kind

Market Report

France

Chablis Gets Back on Track in Mass Retail

Key Figures for Chablis Wines in France

Domestic market: 12.3 million bottles (2023 estimate)

Breakdown by bottles:

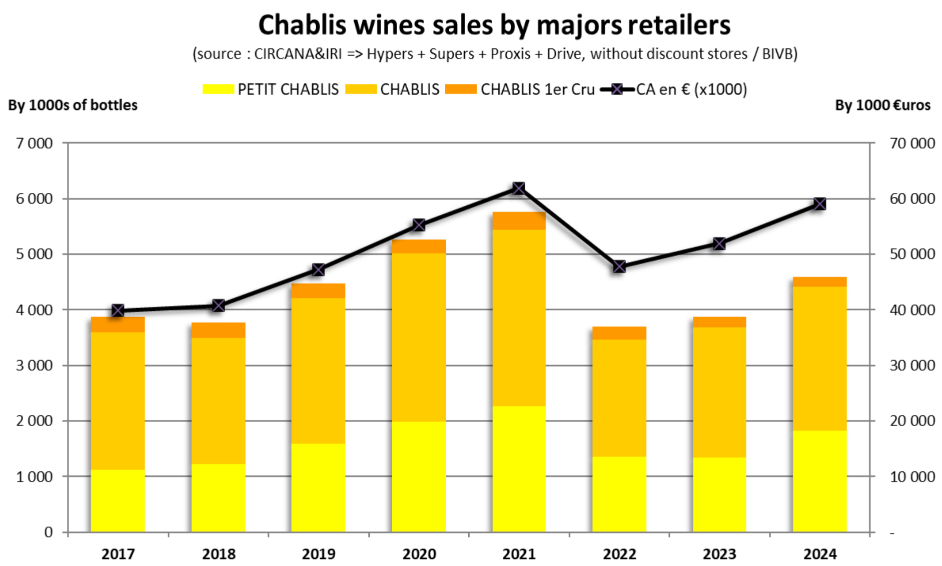
► Mass retail (hypermarkets, supermarkets, discount stores, hard discounters): 4.3 million

►Traditional channels (restaurants, wine shops, direct sales, others): 8 million

According to research firm IWSR, in 2024 approximately 40.5 million French people (77% of the adult population) reported having consumed still wine at least once during the year. This figure remains stable, but consumption is becoming increasingly occasional: between 2019 and 2024, France lost 0.5 million monthly consumers. The main reason cited is the desire to better control their alcohol consumption.

Millennials, however, account for 9.5 million relatively frequent consumers. In addition to sensory pleasure, they associate wine with its relaxing and thirst-quenching properties according to IWSR.

A Quarter of Bourgogne White Wines Sold in Mass Retail Come from Chablis



In 2024, Bourgogne white wines accounted for 17% of the volume of French AOC still white wines sold in mass retail and 24% of their revenue.

Within this channel, **Chablis wines made up one quarter of the Bourgogne white wine volumes sold,** an increase of 2 percentage points compared to 2023, and account for 32% of their revenue, also up by 2 percentage points.

After a decline in 2022, **Chablis AOCs are back on a growth trajectory**, with volumes up 18.4% and value up 13.7% (2024 compared to 2023).

The Petit Chablis AOC reached a volume of 1.8 million bottles (+36.9% compared to 2023) in this channel, generating revenue of 21 million euros (+32.1% compared to 2023), exceeding pre-COVID levels. Conversely, the Chablis AOC has not yet regained its pre-pandemic volumes, but it grew by 10.1% in volume, reaching more than 33 million euros in revenue (+32.1% compared to 2023).

Petit Chablis and Chablis Rank Among The Top 5 Bourgogne Whites Sold In The Restaurant Sector

Wine sales to restaurants by the nine major French groups (wholesalers and Cash & Carry) remained stable in volume in 2023, with revenue totaling 639.1 million euros (+3%, 2023 compared to 2022). After two strong years of growth, Bourgogne wine sales stabilized at 4.9 million bottles, with a 22.9% increase in value (2024 compared to the five-year average).
White wines continue to account for three-quarters of Bourgogne wine sales in the restaurant sector (3.6 million bottles) and 25% of the French AOC still white wine volume.

Thanks to this situation:

- ✓ **Bourgogne maintains its position as the leading AOC white wine region in terms of value** in this channel, accounting for 34% of the revenue with 32 million euros (+8.9%, 2023 compared to 2019).
- ✓ **Bourgogne also maintains its second-place ranking in volume sold**, equivalent to 3.6 million bottles.

Unsurprisingly, AOC white wines are driving this leadership. The Chablis AOC is offered in 30% of surveyed restaurants. Among the top five Bourgogne AOCs for white wines sold by wholesalers and Cash & Carry, two Chablis appellations stand out: Petit Chablis and Chablis.

At wine shops, wine sales are showing strong growth (source: CIRCANA), with revenue of €2.99 billion, up 14% between 2021 and 2023. This figure represents approximately 12% of the total value of the French wine market, estimated at around €23 billion (independant.io, Statista). However, this distribution channel is forecasting stagnation or even a slight contraction in 2024.

Bourgogne ranks as the leading wine region among the wine shops surveyed: in 2022 it accounted for 17% of available bottled wine references. Red wines, which dominate the Bourgogne offering, represent 54.2% of the region's offering. However, Bourgogne white wines are the leaders among white wine offerings at the wine shops surveyed, representing 25% of the references (+7.8%, 2022 compared to 2018).

- ✓ Among white wines, Village and Premier Cru AOCs from the Côte de Beaune and Côte de Nuits are the most present, making up 32% of the Bourgogne offering by number of references.
- ✓ **Chablis AOCs rank next, representing 17% of the offering**.

This leadership of Bourgogne wines at wine shops demonstrates that they meet the expectations of this channel: offering a more personalized buying experience and catering to the growing demand for niche wines, including lesser-known appellations rich in discovery opportunities.

Consumers' Interest in Bourgogne Wines Confirmed

Wine consumption in France is becoming increasingly occasional, and French wine consumers are aging. However, according to the 2024 results of the IWSR survey, **Bourgogne wines have several strengths that help maintain their appeal among wine consumers**:

- ✓ Over 60% of Bourgogne wines are white, a category whose consumption has remained stable over the past three years, unlike red wines.
- ✓ Bourgogne white wines are predominantly made from Chardonnay, a grape variety that is growing in popularity and attracting the largest number of new consumers. In fact, 56% of wine consumers reported drinking Chardonnay in the past six months, compared to 50% in 2020.
- ✓ Wine purchases through more traditional channels, where Bourgogne is well established, remained stable between 2019 and 2024, whereas purchases through other distribution channels, such as mass retail, declined over the same period.

Bourgogne remains among the top five French wine regions in terms of recognition and purchases. It stands out from other French still wine regions with higher purchase declarations compared to the pre-COVID period (+6.3%, 2024 compared to 2019). Chablis wines have been a major driver of this growth, with 26% of surveyed consumers reporting a purchase in 2024, up from 18% in 2019.

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(sources : BIVB – CIRCANA-IRI – IWSR)

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