



## Market report

## Australia

### Exports Rebound

#### Key figures for Chablis wines in Australia (2025)

7th largest market by value (up 2 places)  
9th largest market by volume (up 1 place)

**Exports: 741,000 bottles (+23.6% compared to 2024) for €8.72 million (+22.4% compared to 2024)**

Breakdown by volume

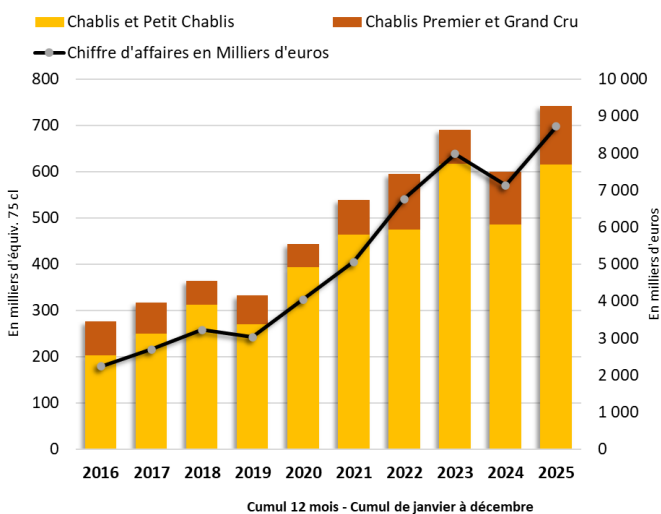
- ▶ Petit Chablis and Chablis: 83%
- ▶ Chablis Premier Cru and Chablis Grand Cru: 17%

In 2025, according to the OECD, Australia's economic growth is expected to reach around 2%, reflecting a gradual recovery following the slowdown observed in 2024. This recovery remains modest, with household spending still cautious and business investment restrained. It is expected to be supported by stronger domestic demand and a gradual stabilization of the global economic environment.

Despite an increase of 2.7 million in the adult population over the past five years, wine consumption continues to decline in Australia. Australians still favor beer. The number of wine drinkers is shrinking, but those who remain are becoming more knowledgeable. Among these more engaged consumers, nearly 27% say they appreciate Chablis wines.

### A Market of Growing Importance for Chablis Wines

Historique Export en Australie - Vins Cru Chablis  
Source (Douane DEB&EMEBI et DAU / BIVB)



After declining in 2024, exports to Australia rebounded in 2025.

Over the 12 months of 2025, Chablis wine exports rose sharply:

- +23.6% in volume compared to 2024
- +22.4% in value compared to 2024

Revenue reached its highest level of the past five years, exceeding €8.7 million.

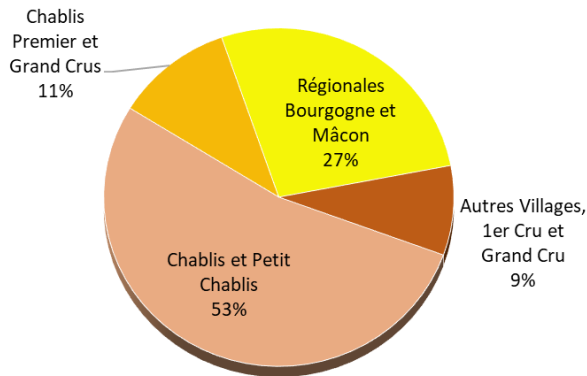
Chablis Premier Cru and Chablis Grand Cru continued to grow in 2025 (+11% in volume compared to 2024), reaching record revenue of more than €2.1 million (+22% compared to 2024). At the same time, Petit Chablis and Chablis also recovered in both volume and value, returning to the record levels seen in 2023, with growth of +26.7% in volume and +22.5% in value compared to 2024, for total revenue exceeding €6.6 million.

Over a longer period, the Australian market has risen from 20th to 9th place for Chablis wines over the past 20 years.

## Chablis Leads Bourgogne Exports

### Parts des volumes des vins blancs de Bourgogne exportés en Australie

Cumul 12 mois de janvier 2025 à décembre 2025  
(source : Douane DEB&EMEDI + DAU)



Over the 12 months of 2025, white wines accounted for 69% of Bourgogne export volumes to Australia and 55% of total value (+4.5% in value compared to 2024).

Chablis AOCs led the category, representing 64% of Bourgogne white wine exports by volume and 55% of the category's value.

After a slowdown in 2024, Chablis exports rebounded strongly in 2025, with growth of +24% in volume and +22.4% in value compared to 2024.

Australia remains an important destination for Chablis Premier Cru and Chablis Grand Cru, ranking 11th among export markets in both value and volume (2025 vs. 2024).

For Chablis and Petit Chablis, Australia now ranks 7th by value and 8th by volume, gaining five places over the past 10 years.

## Fewer Consumers, Greater Expertise

In 2025, Off-Trade purchases (supermarkets, specialty retailers, and wine shops) still accounted for nearly 85% of wine volumes consumed in Australia. However, the market remains below its pre-Covid level, with overall consumption down compared to 2018.

The On-Trade (cafés, hotels, and restaurants) remains more heavily affected, with volumes still well below pre-pandemic levels despite a gradual recovery in foot traffic.

In this constrained environment, Chablis wines continue to perform well, with exports growing steadily since 2018, supported by their premium positioning.

Among still wines, consumers overwhelmingly favor domestic Australian and New Zealand wines, which account for around 94% of volumes purchased outside the On-Trade.

Around a quarter of Australian consumers purchase French wines. Volumes continue to grow steadily despite an average price nearly three times higher than that of Australian wines.

This reflects ongoing premiumization, with growth in wines priced above AUD 23 per bottle and a decline in entry-level segments—dynamics that favor Chablis Premier Cru and Chablis Grand Cru.

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*(Sources: Douane – BIVB – Wine Intelligence/IWSR)*

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