



PURE CHABLIS

One grape
One region
One of a kind

Market Report

USA:

Now the number 1 market for Chablis wines by value



Key 2021 figures for Chablis wines in the USA

1st market by value
2nd market by volume

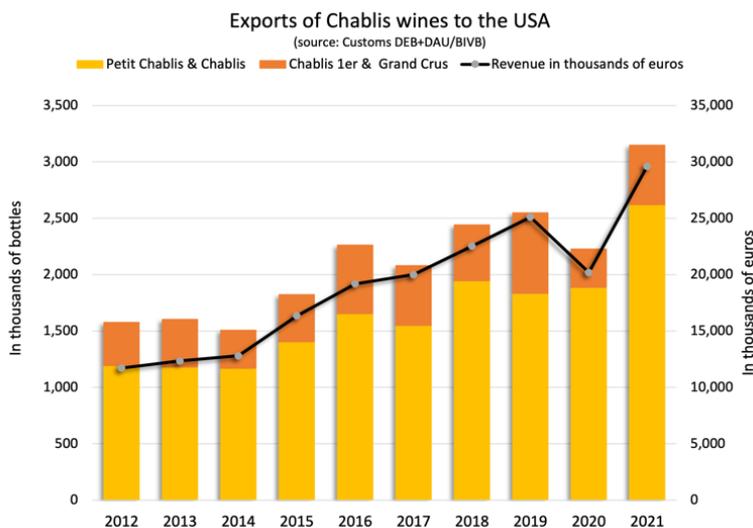
Exports: 3.1 million bottles (+41,2%/2020), for 29.6 million euros (+47%/2020)

Of which, in volume ▶ Chablis Premier Cru & Chablis Grand Cru: 17%
▶ Petit Chablis & Chablis : 83%

After a difficult start to 2021, Washington agreed in June 2021 to suspend for five years its surtax on imports of wine and certain other alcoholic beverages. From the moment of the first announcement on March 5, 2021, the market reaction was such that exports of French AOC wines began rapidly increasing: +18.3% in volume for March 2021 relative to March 2019, prior to the pandemic crisis. The following months confirmed the trend, and two records of the last 30 years were set: 174.7 million bottles exported and 1.8 billion euros of sales in 2021. These records can also be attributed to the American growth rate of 5.7% in 2021, the highest since 1984, which served to erase the effects of the pandemic. The IMF (International Monetary Fund) and the Fed (Federal Reserve of the USA) both forecast growth of 4% in 2022.

Two new records for the Chablis and Petit Chablis AOCs

Exports of Chablis wines to the USA have surged in the same way as other French appellations. 2021 was



exceptional, and led to the USA overtaking the UK to become the leading market by value for Chablis wines, with:

+41.2% in export volume in 2021 relative to 2020

+47% in sales in 2021 relative to 2020

The appellations Petit Chablis and Chablis set two new records:

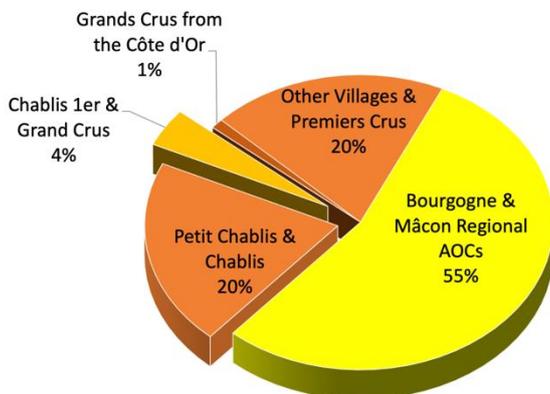
- Volume exported of 2.6 million (equiv. 75 cl) bottles (+39%/2020 and +48%/average 2016-2020).
- Sales of 22 million euros (+43%/2020 and +51%/average 2016-2020).

The Chablis Premier Cru and Grand Cru AOC's continue to progress in value, +60%/2020 and +12%/average 2016-2020. Only the export volume declines relative to the five-year average (-2%/average 2016-2020).

The proportion of Chablis exports continues to increase

Chablis wines account for 24% of Bourgogne white wine exports to the USA

(source: Customs DEB+DAU/BIVB 2021)



White wines of Bourgogne account for 62% of the bottles of Bourgogne wine shipped to the USA in 2021, and 22.5% of the total volume of French AOC wine exported to the USA.

The wines of Chablis have suffered from a poor image in the USA due to the presence of low-level local wines that use the Chablis label. This explains why the proportion of Chablis in white Bourgogne sales here is lower than in other markets. But it has progressed, and in 2021, Chablis wines constitute 24% of white Bourgogne sales and more than 15% by volume of all Bourgogne exports (regardless of color).

Chablis wines prefer traditional and ongoing sales markets

Presence in restaurants and bars (Survey of 350 establishments in 2019 by city):

In New-York and Los Angeles, Chablis wines were in second place in terms of their share of the worldwide offer of still wines in the restaurant sector. Chablis Premier Cru was the most prevalent, and Petit Chablis the least.

In New York, the share of Chablis was 5%. Chablis wines were present in more than half of those establishments surveyed, with on average seven references available.

In Los Angeles, the share of Chablis wines in the global offer of white wines was 4%. They were present in 47% of establishments surveyed, with an average of four references available.

Presence in wine shops (Survey of 50 specialist wine shops in 2019 by city):

In wine shops, Chablis wines were also in second place in terms of their share of the worldwide offer of still wines. There is almost as much Chablis as Chablis Premier Cru, each AOC accounting for slightly over a third of the Chablis references. The presence of Petit Chablis, however, remains discreet.

In New York, the share of Chablis was 3%. Chablis wines were present in 86% of establishments surveyed, with an average of 8 references available.

In Los Angeles, the proportion of Chablis wines in the overall offer of white wines in wine shops was 4%. They were present in 44% of the establishments surveyed, with on average 9 references available.

An ageing population of consumers

The USA market includes 72 million regular wine drinkers (having wine at least once a month), which is 30% of the adult population, and 77% of whom drink wine every week. According to Wine Intelligence, the proportion of regular wine drinkers declined between 2018 and 2021 (-14%), as did that of Americans having wine at least once a week (-10%).

The group of regular wine drinkers appears to be an ageing one. Although its 55-and-over members indicate less interest for wine than the other generations, its consumption gives them pleasure. The 25-39 generation exhibits a strong interest in wine and feels better-informed than the older generations, due to its ease in accessing information on the web.

For the 6000 regular wine consumers surveyed, the first alcoholic beverage consumed was red wine; white wine was second, and beer was in third place. Between 2018 and 2021, these rankings are unchanged, but all three beverages decline somewhat in their popularity. A single beverage among the top 15 gains in interest among the consumers surveyed: Prosecco.

Supermarkets are the primary sales point for wine purchases in the USA. However, their share has decreased by 6 percentage points between 2018 and 2021. Purchases from wine clubs more than doubled between 2018 and 2021. Of the 6000 consumers surveyed in 2021, 29% have bought wine online from a website.

Wine consumption in restaurants and bars has returned to the pattern of 2018, prior to the health crisis. It is the regular wine consumers in the 25-39 age group who most say they buy wine in restaurants and bars. The 21-24 age group is second in buying wine in bars, while the 40-54 group is second in purchasing wine in restaurants.

Economic report produced by the Markets and Development department – BIVB – February 2022

(Sources: Customs - MIBD Market - Wine Intelligence - BIVB)

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