

PURE CHABLIS

One grape
One region
One of a kind

Market Report

Japan

Three consecutive years of growth for Chablis



Key 2021 numbers for Chablis wines in Japan

3rd market by value and by volume

Exports: 2.37 million bottles (+11%/2020), for 19.98 million euros (+1% /2020)

Of which, in volume ▶ Chablis Premier Cru & Chablis Grand Cru: 16%
▶ Petit Chablis & Chablis : 84%

As the third largest economy in the world in 2022, behind the United States and China, Japan expects a GDP growth of 3.4% in 2022. This forecast has been lowered due to the consequences of the pandemic on household consumption and because Japan is experiencing a shortage of semiconductors and other computer components.

Bourgogne wines have a prestige reputation in Japan, a country whose culture, tastes, and values bear some relation to those of Bourgogne. In 2021, white Bourgogne wines accounted for 46% of the volume of French white AOCs exported to Japan, and 2/3 of sales in this category. More than half of the white Bourgogne wines shipped to Japan are from Chablis.

Sales soon to reach 20 million euros

Since 2018, Chablis wines have experienced 3 years of growth, going from 1.9 million bottles in 2018 to more than 2.3 million in 2021, a 15% increase relative to the 5-year average (2020 -2016).

While they have not returned to their 2012 level, these numbers continue to grow in 2021 over 2020:

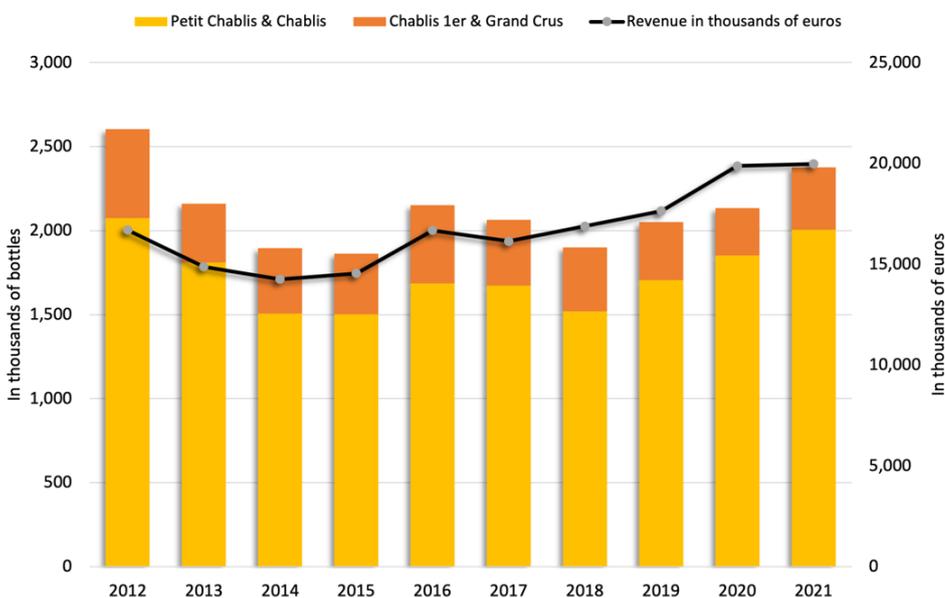
▶ **+11% by volume**
▶ **+1% by value**

This is the second time in more than 25 years that Chablis wines reach a sales level of almost 20 million euros in this market.

The Chablis 1er Cru and Chablis Grand Cru appellations account for 16% of volumes exported, displaying the most significant growth: 31% by volume and 18% by value.

Exports of Chablis wines to Japan

(source: Customs, DEB+DAU/BIVB)

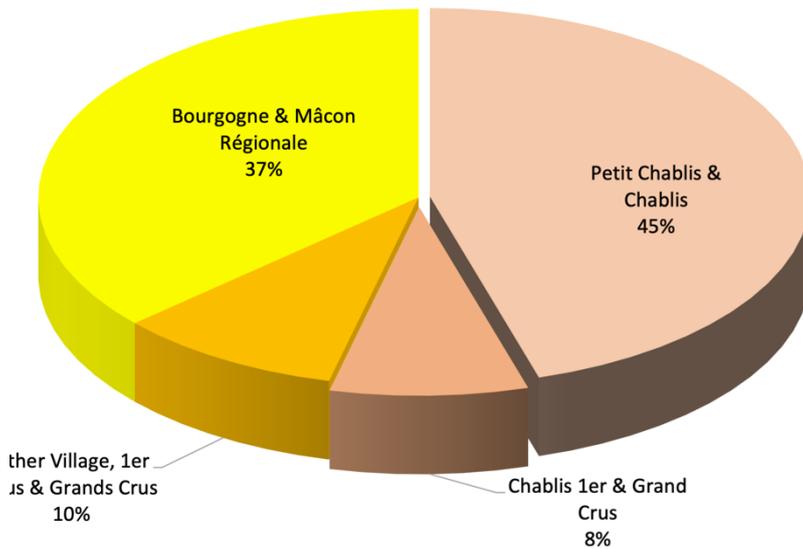


The Petit Chablis and Chablis appellations, with 84% of volumes exported in 2021, increased by 8% by volume, but decreased slightly by 3% in value.

Chablis: an important part of Bourgogne's success in Japan

Importance of Chablis wines in Bourgogne white wine exports to Japan - 2021

(source: Customs, DEB+DAU/BIVB)



The proportion of Chablis in Bourgogne wine exports (all colors) is 30% by volume (second-ranking AOC group exported to Japan) and 17% by sales in 2021.

Exports of Bourgogne whites have always played a large role in this market, varying between 54% and 60% of export volume over the last decade. Chablis contributes substantially to the development of the market for Bourgogne whites in Japan, accounting for 53% of the volume of Bourgogne whites exported to this country. According to a November 2021 study by Wine Intelligence, Chablis wines rank 8th among the top twenty vineyards most purchased. Perhaps not surprising in a country which appreciates Chardonnay, and which puts Bourgogne in 4th place in the same ranking.

Wines securely entrenched in traditional and ongoing markets

Presence in Tokyo restaurants (2019 survey of 400 establishments)

In the restaurant sector, the share of French wines was stable at 57%. Bourgogne wines were available in three-quarters of the establishments surveyed.

The Chablis appellations, present with at least one reference in 61% of the establishments surveyed, were stable compared to 2018. They were ahead of *Village* and *Village Premier Cru* white appellations from the Côte de Beaune.

Among the worldwide offer of white wines:

- ▶ The Chablis appellation was present in 43% of the establishments surveyed, with 104 references
- ▶ The Chablis Premier Cru appellation was present in 31% of the establishments surveyed, with 105 references
- ▶ The Chablis Grand Cru appellation was present in a quarter of the establishments surveyed, with 74 references

Presence among Tokyo wine stores (2019 survey of 30 points of sale)

Bourgogne wines were in top spot among specialist wine stores, with almost 23% of the global offer of wines (stable relative to 2018), with an average of 133 references per establishment surveyed. The Chablis appellations were present with at least one reference in 77% of the establishments surveyed, as in 2018, ahead of the *Régionale* Mâcon appellations and *Village* appellations from the Mâconnais.

Among the worldwide offer of white wines:

- ▶ The Chablis appellation was present in 70% of the establishments surveyed, with 105 references
- ▶ The Chablis Premier Cru appellation was present in 63% of the establishments surveyed, with 59 references
- ▶ The Chablis Grand Cru appellation was present in 53% of the establishments surveyed, with 51 references

Regular wine consumption almost back to normal

Japan boasts 23.9 million regular wine consumers (at least once a month), equivalent to 23% of the adult population, 2/3 of whom drink wine weekly. According to Wine Intelligence, the number of regular consumers decreased by 20% from 2016 to 2020, while that of the weekly wine consumers has increased by 7%.

The regular consumer category is an ageing population. Although consumers over 55 years old state that they do not know much about wine, they enjoy drinking it.

Younger consumers claim to be involved in wine consumption, showing a strong interest in it. Thanks to their easy access to information on the web, they feel better informed than their elders.

In terms of alcoholic drinks, the 2,000 regular consumers questioned place red wine in first place, then beer, and white wine in third place. Between 2018 and 2020, this ranking remains the same, although drinks like sake, cider and craft beer are becoming more significant.

Supermarkets remain the preferred wine purchasing channels in Japan, where more than half of regular consumers surveyed purchased wine there in the past 6 months. However, over the past three years, wine sales in privately owned wine stores are in constant increase and those in supermarkets slowing down.

Wine consumption in restaurants, pubs and bars has returned to what it was in 2018, before the health crisis. Unsurprisingly, the regular consumers aged 34 to 54 are the category leading the move back to normality. The youngest, aged 20 to 34, are also actively heading back to normal, much more so than the 55+ age group.

Economic report produced by the Markets and Development department – BIVB- February 2022
(Sources: GTI – Customs - BIVB – MIBD MARKET – Wine Intelligence)

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