

Belgium:

Chablis wines return to growth in 2019

Key figures in 2019 for Chablis wines in Belgium



6th biggest market in terms of revenue

5th biggest market by volume

Exports: 1.396 million bottles (up 27% on 2018); 9.37 million euros (up 13.7% on 2018)

by volume

- ▶ Chablis Premier Cru and Chablis Grand Cru: 10%
- ▶ Petit Chablis and Chablis: 90%

Chablis wines return to growth

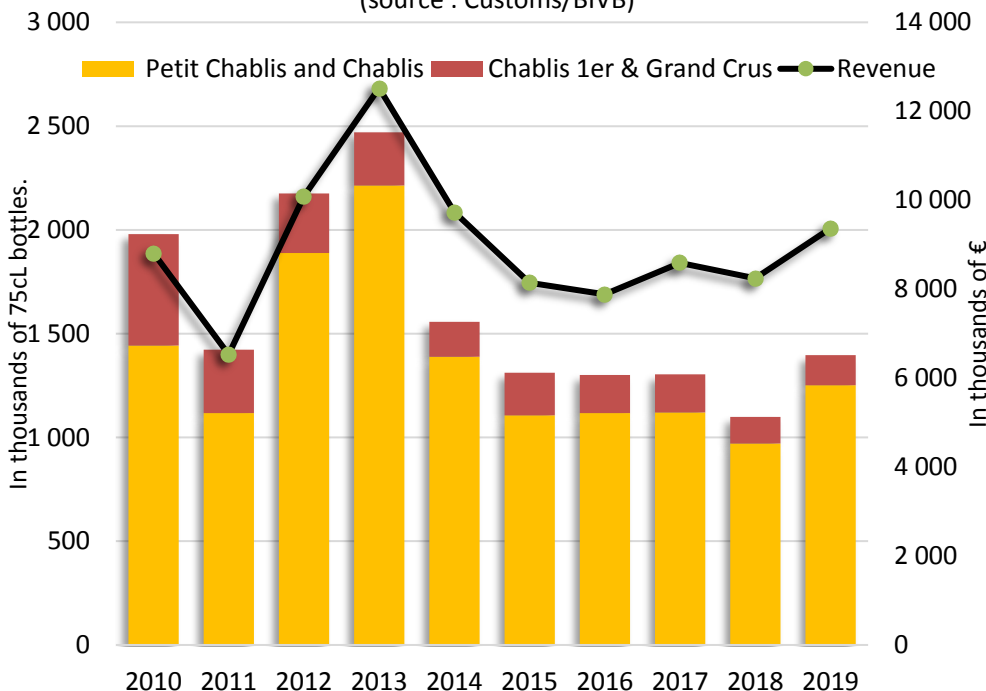
In 2019, the volume of Chablis wines exported to Belgium increased by 27% compared to 2018, alongside a 13.7% rise in terms of revenue. The Petit Chablis and Chablis appellations grew by 14%, with 7.76 million euros, while the Chablis Premier Cru and Chablis Grand Cru appellations recorded an 11% increase in terms of revenue.

These figures only take into account part of the market, since they do not include cross-border purchases, wine bought directly from cellar, or that purchased by Belgian tourists in France. A survey showed that 86% of Bourgogne wine companies questioned mentioned Belgium as one of the two principal origins of foreign customers visiting their outlets (source: BIVB wine tourism survey, 2016).

In the first quarter of 2020, the Chablis Premier and Grand Cru appellations gained market share, soaring 151.1% by volume and 45% in terms of revenue. However, the Petit Chablis and Chablis appellations fell back 24.2% by volume and 22.4% in terms of revenue.

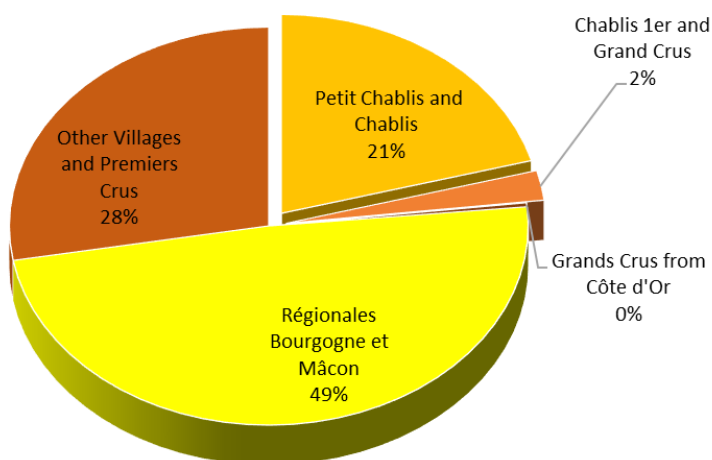
Exports of Chablis wines to Belgium

(source : Customs/BIVB)



White wines driving Bourgogne exports

Chablis wines account for 23% of exports of white Bourgogne wines to Belgium
(source : Customs / BIVB)



Over the past 10 years, the growth of Bourgogne wine exports to Belgium has been driven by white wines. This situation was confirmed in 2019, with a 15.8% increase in the volume of white Bourgogne exports. These accounted for three-quarters of shipments, although Bourgogne red wines also grew. Exports of white wines crossed the threshold of 5 million bottles, with Chablis wines accounting for almost a quarter of the volume of white Bourgogne exports to this market, and 17% of all shipments.

In terms of revenue, Chablis wines accounted for 31% of receipts for Bourgogne whites: 26% from Petit Chablis and Chablis appellations, 5% from Chablis Premier Cru and Grand Cru appellations.

A fall in home consumption of French wines

According to a survey by GFK, wine purchases reported by Belgian households for home consumption fell by volume for the third consecutive year, down 3.7% in 2018 compared to 2017. A 31%-increase in excise duty introduced at the end of 2015 had a major impact.

French wines accounted for half of household consumption, despite a steady drop by volume (-2%). While 57% of Belgian households still purchased French wines, only 47% bought AOC wines (down 2 points); all French wine regions saw a slide in sales.

Bourgogne wines maintained their market share of 1.6% by volume, but nonetheless accounted for 7% of sales for wine priced at more than €5. Overall volumes consumed were stable, but the customer base fell to just 8.6% of Belgian households, half as many as in 2012. In 2018, Bourgogne wines gained market share in some areas where they were under-represented: In the southern region, among those aged 30-50, and among the upper-middle classes. The over-50s and better-off households nonetheless remained the biggest consumers.

Chablis selling best in long-standing, traditional markets

Presence in restaurant and bars (Survey of 150 establishments in 2019):

Red wines accounted for 55% of references offered on restaurant wine lists, white wines accounting for 34%, sparkling wines 8%, and rosé wines 3%. French wines largely dominated in this sector, for both reds and whites, with around two-thirds of references and a presence in nearly 90% of restaurants. Half of the remaining references were Italian wines.

Among white wines, Bourgogne (present in three-quarters of establishments surveyed) accounted for one quarter of the offer, far ahead of wines from the Loire (13%) and Alsace (9%). **Chablis is the most widely available appellation from the Bourgogne region** (6 restaurants out of 10), ahead of Meursault (26%), and Pouilly-Fuissé (24%).

Sales of Chablis wines were concentrated in the range of €40 to €75, whereas a third of *Régionale* whites sold at between €30 and €40.

Market report produced by the Markets and Development department of the BIVB – June 2020
(Sources: Custom – BIVB – GFK Belgium – MIBD MARKET)

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