

2025 Shipments: Calvados holds firm

In 2025, Calvados recorded 4,348,000 bottles placed on the market*, representing a moderate volume contraction of 5.6% against a backdrop of significant deceleration in global spirits demand. This result confirms the structural resilience of the sector.

EXPORT: A STRATEGIC PILLAR

Exports remain a central driver, with 2.1 million bottles shipped in 2025 — representing nearly one in every two bottles sold outside France.

The European Union accounts for 70% of exported volumes, underscoring its dominant position in the international Calvados market. The category benefits from particularly dynamic local conditions, especially in Northern and Eastern Europe.

Outside Europe, shipments to Japan saw a significant rebound last year, while the United States maintained broadly stable volumes despite the introduction of customs duties (-3%).

FRANCE: THE STABILISING EFFECT OF DIRECT SALES

At 2.25 million bottles, the domestic market remains Calvados's primary outlet, despite an 7.8% decline in sales. In a context of subdued consumption, the sector is leveraging its structural assets to limit the impact on revenues.

The summer season highlighted the importance of tourism. In Normandy, estate visits are supporting direct-to-consumer sales, which is emerging as a strategic growth channel. Less exposed to international market fluctuations, this channel optimises the value captured by producers and reinforces the territorial anchoring of the three controlled designations of origin (AOC Calvados, AOC Calvados Pays d'Auge, AOC Calvados Domfrontais).

"Our fundamentals rest on a dual equilibrium: a structured export base, predominantly European, and a domestic market capable of evolving its commercial channels. The development of 'spiritourism' is not merely a cyclical buffer — it opens lasting prospects in terms of value creation, consumer engagement, and sales channel security. In a volatile environment, this diversification must strengthen the economic robustness of the sector. We call on the French public to reclaim their historic spirits, expressions of an exceptional living heritage at the heart of emblematic estates."

— Guillaume Drouin, President of the Calvados section, Interprofession des Appellations Cidricoles (IDAC).

* 12 180 hectolitres of pure alcohol sold in France and worldwide in 2025 (source: IDAC).

ANNUAL BREAKDOWN BY CALVADOS AOC

| Appellation | Destination | Volume (HL PA) | Volume approx. (Bottles) | YoY Change 2024/2025 |
|--------------------------|-----------------------|----------------|--------------------------|----------------------|
| Calvados Pays d'Auge AOC | France | 1,954 | 697,578 | +1,65 % |
| | Export | 1,577 | 563,000 | +8,28 % |
| | Total Pays d'Auge AOC | 3,531 | 1,260,567 | +4,53 % |
| Calvados Domfrontais AOC | France | 124 | 44,268 | +9,76 % |
| | Export | 33 | 11,781 | +44,14 % |
| | Total Domfrontais AOC | 157 | 56,049 | +15,44 % |
| Calvados AOC | France | 4,234 | 1,511,538 | -11,46 % |
| | Export | 4,258 | 1,520,106 | -7,72 % |
| | Total Calvados AOC | 8,492 | 3,031,644 | -9,61 % |
| TOTAL | | 12 180 | 4 348 260 | -5,64 % |

POMMEAU DE NORMANDIE – 2025 FIGURES

In 2025, 465,000 bottles of Pommeau de Normandie were sold (-10.02%) *. The domestic market remains the foundation of the appellation, with 3,088 HL placed on the market. Exports accounted for 170 HL, an increase on 2024.

*3258 HL sold in France and worldwide in 2025 (source: IDAC)

About Calvados (drinkcalvados.com) :

300 distilleries & micro-distilleries operate within the three Calvados AOCs (Calvados, Calvados Pays d'Auge et Calvados Domfrontais). These companies are grouped within the Interprofession des Appellations Cidricoles (IDAC). The IDAC's mission is to undertake actions aimed at developing the awareness of these 3 AOCs.

More about the IDAC's missions <https://bit.ly/2x9ZZnt>

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