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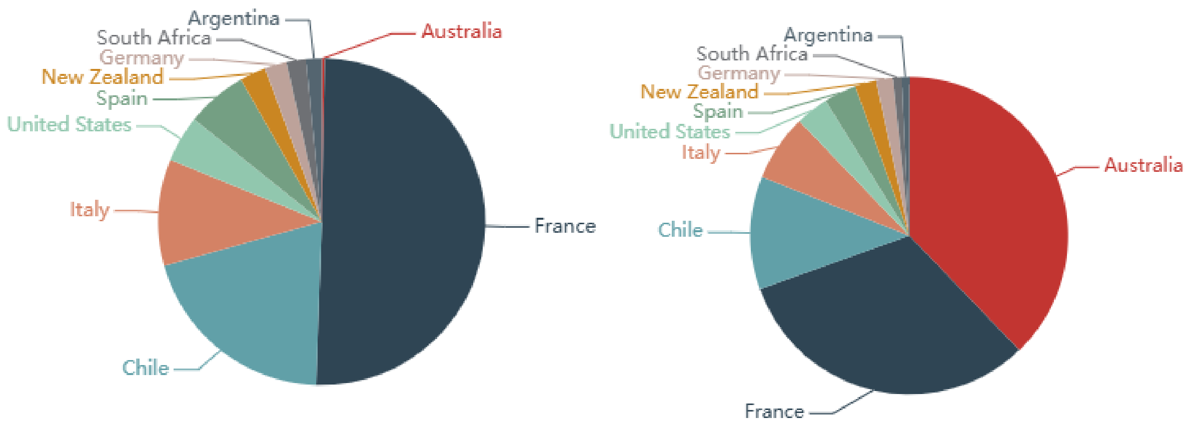
Report Highlights:

In 2024, China imported approximately $1.6 billion of wine and related products with Australia and France as the leading suppliers. U.S. exports of wine and related products to China totaled $96 million in 2024. Tier-one cities such as Shanghai, Beijing, Shenzhen, and Chengdu are home to a growing base of wine enthusiasts, with regional consumption patterns underscoring the importance of tailored strategies to address diverse preferences. Surveys by trade show organizers indicate rising interest in white and sparkling wines, presenting growth opportunities for U.S. exporters. Key drivers for market expansion include attracting new consumers, fostering wine-drinking occasions, and leveraging localized digital storytelling to connect with audiences. Retail giants like Sam's Club and Costco China are leading the trend of self-sourcing wine selections, contributing to substantial growth in wine sales.

Market Trends and Consumer Preferences

Data from the General Administration of Customs China (GACC) shows that China imported approximately $1.6 billion of wine and related products in 2024, with Australia and France dominating the market share. U.S. exports of wine and related products totaled $96 million in 2024.

China's Sources of Imported Wine (2023 and 2024)



China Imports from World Commodity: HS 2204, Wine Calendar Year: 2023 – 2024, Source: Trade Data Monitor

China's wine imports for January–July 2025 totaled $879 million, a 3.2 percent decline from the same period in 2024, reflecting sluggish consumption trends in China's overall economy. Among suppliers, Australia showed strong recovery with exports surging 28.3 percent to $366.5 million due to the resolution of tariff issues and rising demand for affordable wines. Meanwhile, U.S. trade data shows exports of U.S. wine to China declined by 70 percent, totaling $17.4 million. Imports of French wine fell while New Zealand and Georgia wines saw notable growth.

Growth of Affordable Wines, White Wines, and Online Purchases

Consumer priorities shifted in the post-pandemic era, with travel, health, and family time taking precedence over the previous enthusiasm for luxury goods. This cultural shift also affects wine consumption with many consumers prioritizing value-based purchases, where Chinese consumers are seeking affordable, convenient wine options from trusted retailers rather than high-end wines. In response, major retailers like Sam's Club and Costco China directly source their wine, driving significant growth in first-tier cities like Shanghai, Shenzhen, and Beijing where they have store locations. Industry contacts shared that the best-selling wines at these U.S. brand retailers are red wines from the United States and white wines from Germany and New Zealand. Although Chinese consumers have historically favored red wines from France and Italy, new consumer segments such as white-collar women favor lower- Alcohol by Volume (ABV) white and sparkling wines.

Consumer purchasing behavior is also shifting towards digital sales channels, including the use of social media and livestreaming as avenues for education and shopping. Localized storytelling by key opinion leaders (KOLs) using platforms such as Red Note and Douyin are effective ways wine brands appeal to the enthusiast and younger consumer base. (This business advisory highlights some of the risks associated with Chinese platforms.) Though traditional e-commerce giants still dominate sales of better-known brands, social commerce and livestreaming are emerging as reliable sales channels.

In general, industry sources have a mixed outlook for the market, despite facing a decline in sales in 2024. Wine sales across China are declining due to several factors, with lower- and mid-tier brands most affected. However, Chinese wine importers and brands remain competitive by staying ahead of new trends and targeting specific growth areas. Major wine events like the Chengdu Food and Drinks hotel show attracted moderate foot traffic, but exhibitors noted high-quality visitors.

Prospects and Opportunities for American Wines

U.S. wines are increasingly accepted by Chinese consumers due to their flavor profiles, which pair well with Chinese cuisine, and because of their presence in club stores such as Costco and Sam's Club. However, they do not share the same market position as their European, New Zealand, or Australian counterparts. With the popularity and expansion for club stores, along with continued consumer education particularly in the enthusiast segment, U.S. wines have some opportunities in first-tier cities.

Consumer Segments

China's first-tier cities – Shanghai, Shenzhen, Beijing, and Guangzhou – are key destinations for imported wine, due to their large populations, advanced logistics, strong economies, and sophisticated wine culture. In 2024, 29 of China's 31 provincial-level regions imported bottled wine (≤2L containers), with Ningxia and Qinghai as exceptions. Coastal provinces like Shanghai, Guangdong, Zhejiang, and Fujian dominate as entry points and consumption hubs, driven by their economic strength and established wine traditions. These regions play a central role in distributing and consuming international wines and are expected to remain leaders in China's evolving wine market.

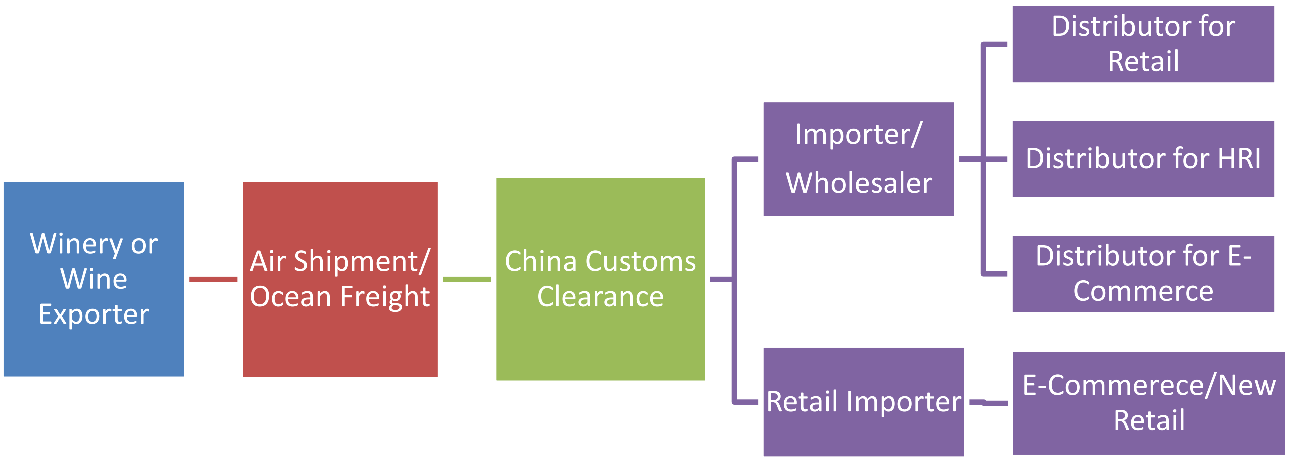
Industry contacts consider three major categories of wine consumers in the current market. The first group consists of volume-driven, large-scale institutional consumers, such as government entities and corporate users. This segment faces significant challenges recently due to the economic headwinds and policies aimed at curbing food and wine consumption for party officials (See GAIN CH2025-0161). The second group is the sophisticated wine lover community, which remains resilient and continues to thrive. Industry contacts shared that an emerging consumer segment within this category is white collar women between 30-45 years old in first-tier cities, as they have the purchasing power and interest in consuming wine in bistros and wine bars. Wine shops and bistros are successfully connected with these consumers and wineries through curated tasting experiences and strategic locations. The third group, though still emerging, comprises the younger generation of wine drinkers. This demographic often feels intimidated by existing perceptions of wine culture, struggles to understand it, or hesitates to engage with the products. Targeted education and outreach efforts are essential to engage this group and foster their interest in wine.

Wine education plays a major role in consumer engagement in China, especially within the "enthusiasts" category. The increase in specialized and certification wine education programs has raised consumer awareness, improved the expertise of food service and retail industries, and driven industry growth. Many promotional agencies are actively working to capitalize on this opportunity. The Wine & Spirit

Education Trust (WSET), for example, reduced enrollment fees for its Level 1 course by half, aiming to reignite interest in wine education.

Market Entry Overview

For entry into the Chinese market, all imported wines must be registered through the General Administration of Customs China (GACC), China Import Food Enterprise Registration (CIFER) system. The port of entry process for wine imports into China involves critical logistics, transportation, and customs clearance steps. Upon arrival, many firms utilize bonded warehouses to store their wine in temperature-controlled environments, preserving quality while deferring duties and taxes until distribution. After customs clearance, the wine is transported domestically to distributors, wholesalers, or retailers. Distribution involves partnerships with local importers and distributors who have established networks in China. Wine is sold through wholesale channels to restaurants, hotels, and retail outlets, as well as through retail channels such as supermarkets, specialty wine shops, and e-commerce platforms.



Major Wine Purchasing Channels

E-commerce

E-commerce is an important distribution channel for wine in China, showing significant growth and positioning the country as one of the leading markets for online alcohol sales globally. This trend is driven by younger generations, particularly Gen Z, who value convenience and variety in their shopping experience. Dominant platforms like Tmall and JD.com still lead the market, while niche platforms such as Douyin (TikTok) and social commerce sites like Xiaohongshu (Red Note) are creating new opportunities for brands to connect with tech-savvy consumers.

On-demand delivery platforms such as Meituan have also emerged this year as a new channel for wine and other alcoholic beverages. Offering rapid delivery—often within 30 minutes—and a wide product selection.

On-premise trade

On-trade channels, such as hotels and restaurants, remain traditional avenues for wine consumption. Food and wine pairing play a less direct role in Chinese cuisine culture as consumers prioritize the social context—who they are drinking with and the occasion—over pairing wine specifically with food. However, wine pairing has a role within high-end restaurants featuring Japanese and Western cuisines. Major cities also have dedicated wine bars where consumers are able to interact more with food pairings and selecting specific wines for the occasion.

Off-premise trade

Off-trade wine consumption, particularly in lower-end stores, is highly competitive and price-sensitive. Retailers like Aldi excel in this segment by leveraging private label products, which account for over 90 percent of their offerings. Aldi achieves cost-effectiveness through custom manufacturing and private labeling, importing bulk wine from low-tariff regions like Chile and bottling it locally. For branded wines, however, consumers tend to rely on major retailers such as Sam's Club, Costco, Ole', or Hema for sourcing, reflecting a preference for trusted brands and quality assurance.

Marketing and Promotion Efforts

Trade Shows

For wineries or wine exporters new to the market, professional wine shows—often attended or supported by FAS China—offer valuable opportunities. These events are typically organized by established, international industry leaders.

Event Name	Date	Region	Website
ProWine China	November	Nationwide	https://www.prowine-shanghai.com/en/ Reach out to ATO Shanghai for details atoshanghai@usda.gov
China International Import Expo	November	Nationwide	https://www.ciie.org/zbh/en/ Reach out to ATO Shanghai for details atoshanghai@usda.gov
Wine2Asia	May	South China	https://www.vinitaly.com/en/events/vinitaly-around-the-world/wine-to-asia/ Reach out to ATO Guangzhou for details atoguangzhou@usda.gov

If you are an exporter or have an in-country agent, inland trade shows can provide a platform to showcase products and attract regional distributors with limited access to new imports.

Chengdu Food and Drinks Fair	March	Southwest China	Reach out to ATO Beijing for details atobeijing@usda.gov
Ningxia Wine Cultural Expo	June	Northwest China	Reach out to ATO Beijing for details atobeijing@usda.gov

Attachments:

No Attachments.