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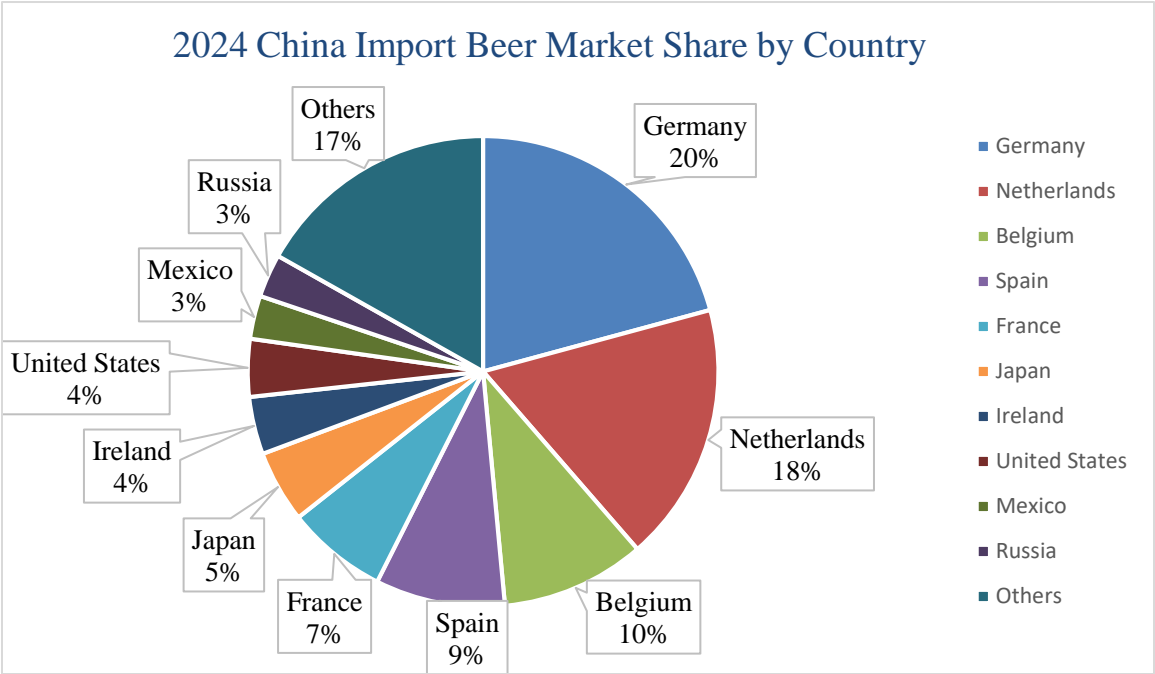
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Report Highlights:

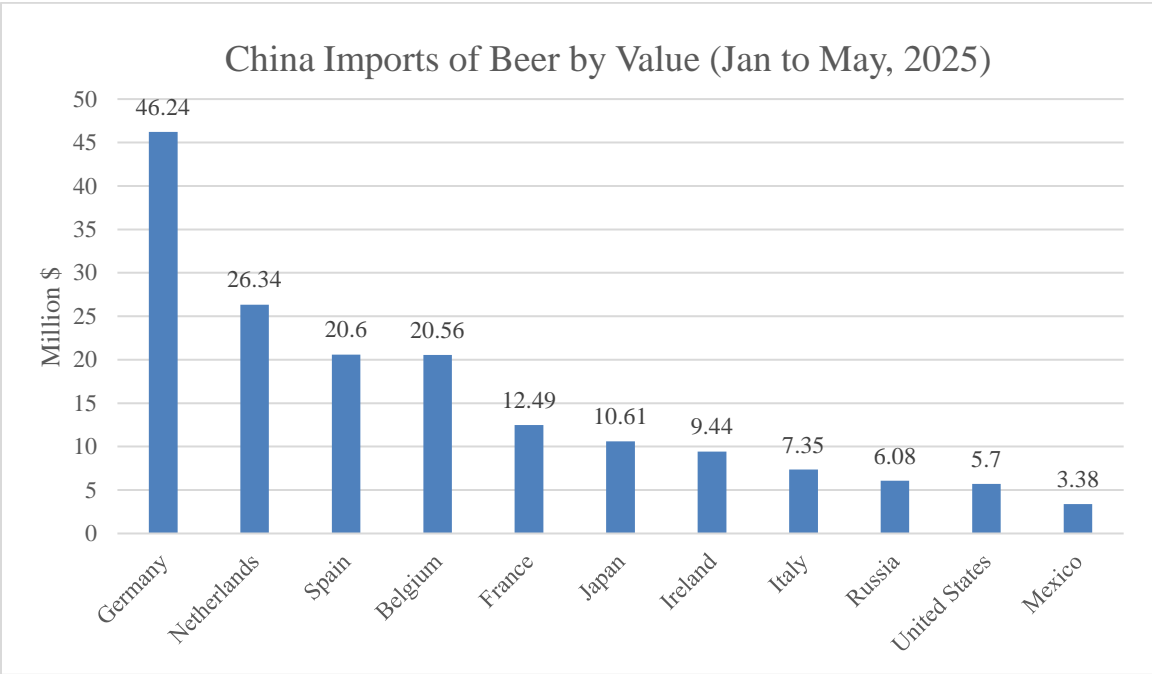
China's craft beer market offers significant growth potential for U.S. breweries, driven by rising demand for premium and innovative beer styles among younger, urban consumers. However, the market is not without its challenges including high import tariffs, regulatory complexities, and intense competition from both domestic and international players. To succeed, U.S. breweries must adopt a strategic approach that combines digital engagement, tailored product offerings, and active participation in trade shows and beer festivals. By leveraging their strengths in innovation, quality, and diverse beer styles, U.S. brands can position themselves to capture market share and build lasting connections with Chinese consumers in this rapidly evolving landscape.

Market Overview

China’s beer imports have steadily declined in value in recent years, driven by weak consumer demand amid economic challenges and increased competition from domestic craft breweries. Total imports fell from \$650 million in 2022 to \$549 million in 2024. Germany remained China’s leading beer supplier, with imports valued at \$116.43 million in 2024. The Netherlands, Belgium, Spain, and France collectively accounted for 65 percent of China’s beer imports. Despite ranking as China’s 8th largest beer supplier, the United States demonstrated consistent growth, with exports rising from \$12.97 million in 2020 to \$19.49 million in 2024. Notably, 2024 was a record year for U.S. craft beer exports, with China emerging as the second-largest international market for U.S. craft beer.



In the first five months of 2025, China’s beer imports from Germany showed a significant year-on-year increase of 29 percent, totaling \$46.24 million. In contrast, the Netherlands experienced a sharp decline of 31 percent, following a strong performance in 2024 with imports valued at \$26.34 million. Spain, however, saw substantial growth of 51 percent, reflecting a positive trend in the early months of 2025. On the other hand, U.S. beer imports decreased by 14 percent compared to the same period in 2024, largely due to the temporary high retaliatory tariffs imposed on U.S. products in April. Imports from other countries, such as Japan and Ireland, grew, with Japan increasing by 55 percent in the first five months of 2025 and Ireland by 24 percent.



Average Beer Cost

Imported beer in China commands a significant premium over domestic options, typically costing two to five times more than domestically produced options. Pricing varies significantly depending on the brand, country of origin, and product positioning. Below the table provides four tiers of the imported beer in China market.

Table 1: Imported Beer Price Range (Per 330ml)

 Price Category	 Price Range (RMB)	 Approximate USD Equivalent
 Entry-Level	Less than RMB 30	Less than \$4.20
 Mid-Range	RMB 30 to RMB 60	\$4.20 to \$8.30
 High-End	RMB 60 to RMB 100	\$8.30 to \$14.00
 Super Premium	Over RMB 100	Above \$14.00

In comparison, locally produced beers are significantly more affordable, with mainstream industrial lagers typically priced below RMB 10 (approximately \$1.40) per 500ml. Mid-tier domestic industrial beers range from RMB 10 to 20 (about \$1.40–\$2.80), while domestic craft beers are priced between RMB 15 and 60 (around \$2.10–\$8.30) per 330ml or 500ml, with some limited editions costing even

more. These competitive prices make domestic beer the preferred choice for mass-market consumers. The substantial price gap between imported and domestic products reflects differences in production costs, import duties, brand positioning, and consumer perceptions of quality.

Regionalization of the Beer Market in China

China's beer market shows clear regional variation, with the strongest prospects concentrated in first-tier cities and emerging new first-tier cities. Major metropolitan areas such as Beijing, Shanghai, Shenzhen, Chengdu, Hangzhou, and Nanjing lead the market due to higher disposable incomes, better education levels, and a growing consumer preference for premium and imported beer. These cities also benefit from well-developed logistics networks and a wide range of retail and hospitality channels that offer diverse beer selections.

In addition to these core markets, second-tier cities—including Changsha, Chongqing, Wuhan, and Xi'an—are showing increasing potential. These cities are experiencing rapid growth in their young, urban populations, who are more open to trying new and imported products. With the continued pressure of economic downturn and rising unemployment rates in first-tier cities, many high-income, well-educated consumers who have a deep understanding of and passion for high-quality imported beer are choosing to leave these cities and move to second- and third-tier cities. They bring their knowledge and enthusiasm for high-quality imported beer to such cities. This population movement trend is also driving the rise and development of imported beer and craft beer in second- and third-tier cities. The expansion of bars, restaurants, and nightlife venues (HRI channels) in these areas creates strong consumption scenarios for both domestic craft and imported beers.

Furthermore, tourism hotspots and coastal cities tend to exhibit stronger demand for imported beer compared to inland regions. These locations not only attract a more international and affluent consumer base but also typically have better infrastructure for international trade and distribution, making them natural entry points for imported brands.

In terms of brewery concentration, most of China's domestic craft breweries are clustered in economically developed regions, particularly in areas around big cities such as Beijing, Shanghai, Guangzhou, Hangzhou, Nanjing, and Chengdu. These urban centers offer a larger base of craft beer consumers, along with better access to quality ingredients, skilled talent, and marketing opportunities. Additionally, these same cities serve as key entry points for imported beer after it arrives at major ports like Tianjin, Shanghai, or Guangzhou. Their well-established import infrastructure, international connectivity, and mature retail networks make them strategic hubs for both domestic production and international beer distribution.

Currently, China's domestic craft beer industry has yet to establish a unified and widely recognized market standard, resulting in a diverse and varied development landscape. On one hand, many breweries insist on using high-quality imported ingredients, focusing on taste and quality to produce premium craft beers; on the other hand, there are some pseudo-craft breweries that use low-quality, cheap ingredients while marketing themselves as "craft." This situation makes it difficult for consumers who lack

knowledge and experience with higher quality craft beer to accurately distinguish authenticity. It is expected that this mixed-quality phenomenon will persist in the short term.

For more information about China's domestic brewery, please refer to the USDA GAIN Report [US Brewing Ingredients - Opportunities in Chinas Booming Craft Beer Sector | CH2025-0099](#)

Consumer Trends

Well-educated individuals aged 25 to 40 in first-tier cities make up over 50 percent of the consumer base for imported craft beer. Male consumers still outnumber females overall, but there has been a noticeable rise in demand among female drinkers, particularly for fruit-flavored sours and lower-alcohol options. Several contacts of ATO Beijing report increasing female beer drinkers and/or brewpub patrons. This trend is expected to continue growing in the coming years, driven by evolving preferences and a broader appeal of craft beer varieties.



E-commerce platforms, taprooms, and restaurants are the primary channels through which consumers purchase imported beer, collectively accounting for around 70 percent of the market. Imported beers with strong brand recognition and competitive pricing also have a presence in retail outlets and convenience stores. Canned beer is preferred for its ease of transport and consumption. IPA remains the most popular style among imported beers, though demand is growing for stouts, sours, and fruit-flavored varieties. Eye-catching, creative packaging continues to appeal strongly to younger consumers, often influencing purchase decisions.

Pricing Benchmarks

Imported beers priced between RMB 15–30 (\$2.10–\$4.20) attract the broadest consumer base in China, serving as an accessible entry point for many beer drinkers, including those new to the category. For dedicated craft beer enthusiasts, imported beers priced between RMB 30–60 (\$4.20–\$8.30) are the most popular, as beers priced below RMB 30 (\$4.20) are often perceived as lower quality, while those exceeding RMB 60 (\$8.30) are viewed as luxury items. This price sensitivity has become more pronounced in the current climate of cautious consumer spending.

Nevertheless, a small but loyal segment of consumers remains willing to pay a premium for limited-edition offerings, unique styles, or distinctive flavor profiles. According to IWSR data from 2024, premium beer was the only price segment to achieve growth in China, increasing by one percent in

volume, even as overall beer consumption declined by five percent. While premium beer remains a niche category, it is expected to experience steady growth in the coming years.

Prices are significantly higher in bars, restaurants, and taprooms due to service premiums, often doubling or tripling compared to retail. E-commerce platforms may offer better value through multi-pack deals, especially during promotions, though logistics can add to the overall cost. Ultimately, the pricing reflects not only import duties and distribution expenses but also the perceived quality, rarity, and brand image of imported beers in the Chinese market.

Shelf-Life Expectations

Shelf life is a critical factor for Chinese distributors when evaluating imported beer. Most importers and distributors prefer products with a remaining shelf life of at least 6 to 9 months upon arrival in China. Beers with shorter shelf life, such as unpasteurized or hop-forward styles like IPAs, may face greater scrutiny due to the risk of flavor degradation during long transit times. Distributors typically require clear labeling of ingredients, production and expiration dates, along with cold chain logistics support for temperature-sensitive products. In some cases, particularly for premium craft beers, distributors may accept shorter shelf life if brand recognition, exclusivity, or product quality can justify the trade-off.

Market Challenges and Opportunities

The Chinese craft beer market presents a dynamic mix of challenges and opportunities for U.S. breweries seeking to expand their presence. While the growing demand for premium and innovative beer styles among younger, urban consumers offers significant potential, navigating the complexities of import regulations, price sensitivity, and intense domestic competition requires strategic planning. A SWOT analysis below provides a comprehensive overview of the strengths, weaknesses, opportunities, and threats that U.S. craft beer brands face in this rapidly evolving market.

Table 1: SWOT Analysis: U.S. Beer Exports to China

Strengths ✓ U.S. beer is widely recognized for its premium quality, innovation, and unique flavors, offering distinctive styles that appeal to discerning consumers. ✓The U.S. beer industry provides a broad range of offerings, including IPAs, stouts, sours, and other specialty brews, catering to the diverse tastes and preferences of Chinese consumers.	Weaknesses ✓ High import tariffs and logistics expenses raise the overall cost of U.S. beer in China, reducing its price competitiveness in the market. ✓ Long transit times lead to shorter shelf life and potential quality degradation. ✓ Navigating China’s import regulations can be both time-consuming and resource-intensive for U.S. exporters.
Opportunities ✓ Rising demand for craft and premium beer creates opportunities for U.S.	Threats ✓ Intense competition from domestic breweries offerings which are more cost-

breweries known for innovation and diverse flavor profiles. ✓ Beer festivals across the country provide U.S. brands platforms to increase visibility, engage consumers and build local trade relationships. ✓ Expanding e-commerce and retail channels provides U.S. beer brands with accessible and efficient avenues to reach urban consumers, facilitating market entry and expansion.	effective and easier to access. ✓ U.S. beer is priced higher than local or other international alternatives due to higher tariffs and logistics costs, limiting their mass-market appeal. ✓ Changes in the global economy, including tariffs and potential trade tensions, may negatively impact the profitability and market stability of U.S. beer exports to China.
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Competitive Landscape

U.S. craft beer faces growing competition in China from a range of international and domestic players. Key competitors include well-established European breweries, emerging brands from Australia and New Zealand, and a rapidly expanding domestic craft beer scene. Each of these competitors offers distinct advantages and poses unique challenges to the market position of U.S. craft beer:

Australia and New Zealand	China Domestic Craft Beer Brands	European Countries (Germany, Belgium, U.K.)
✓ Lower cost of brewing ingredients (malt and hops) ✖ Limited brand influence within the Chinese market	✓ Customized to local taste preferences, such as tea- and fruit-flavored beers ✓ Efficient supply chains ✓ strong price competitiveness ✖ Limited international recognition	✓ Established craft beer traditions ✓ Renowned classic styles (e.g., Belgian Trappist ales, German wheat beers) ✓ Strong brand recognition ✖ Heavier flavor profiles that may not appeal to all consumers ✖ Limited innovation and marketing targeted at younger demographics

Regulatory Requirements

Imported beer in China is subject to stringent regulatory requirements overseen by the General Administration of Customs (GACC) and other relevant authorities. All imported beer must comply with China’s national food safety standards. For U.S. beer exports, breweries must adhere to the registration

requirements established under the Administrative Measures on Registration of Overseas Manufacturers of Imported Foods (Decree 248). This process involves submitting detailed information about the manufacturing facility, including its location, production processes, and food safety management systems, while ensuring compliance with China’s food safety standards. Failure to meet these requirements can result in delays or restrictions on market access, underscoring the importance of thorough preparation and documentation for U.S. exporters.

For more detailed information about regulatory requirement, please refer to USDA GAIN reports: [Overseas Facilities Registration Regulation - Decree 248 | CH2021-0045](#) and

[Decree 248 Guidance for US Exporters | CH2023-0191](#)

Labeling Compliance

Labeling is a critical compliance area for imported beer in China. Products must feature a Chinese-language label, either pre-printed or affixed with a compliant sticker, prior to sale. The label must include the following key information:

- Product name
- List of ingredients
- Alcoholic content
- Original malt extract concentration (expressed in Plato degrees)
- Name and address of the importer or distributor
- Production date
- Shelf life
- Storage instructions
- Net content (in volume)
- Exporter’s China GACC registration number
- Any cautionary language required by regulations

Labels must also adhere to formatting and terminology standards outlined in GB 7718-2025 (General Rules for the Labeling of Prepackaged Foods), which was updated in March 2025. A

Example Beer Label:

啤酒(Beer Name***)

净含量：355毫升(Net Content in milliliters)

原产国 (Country of Origin): 美国

酒精度 (Alcohol Strength): **% vol

原麦汁浓度 (Original Malt Extract Concentration): **° P

原料与辅料(Ingredients): 水，啤酒麦芽，啤酒花，酵母。

生产日期(Production Date): ****年**月**日

保质期至(Expiry Date): ****年**月**日

贮存条件(Storage Instruction): 请置于阴凉干燥处

生产商(Manufacture): ****

中国总代理(Importer): ****

地址(Address): ****

电话(Phone): ****

警示语(Warnings). ****

notable change in the updated regulations is that for products with a shelf life of six months or more, the shelf life and shelf-life expiration date may be marked, making production dates optional. For more information about labeling, please refer to the USDA GAIN Report [Prepackaged Food Labeling Standards Finalized | CH2025-0070](#)

Marketing Strategies for Reaching Local Craft Consumers

In the dynamic Chinese craft beer market, a combination of digital and offline marketing strategies is essential for effectively reaching target consumers. Social media platforms such as WeChat, Weibo, Douyin (TikTok China), and Xiaohongshu are central to brand promotion, storytelling, and consumer engagement, particularly among younger, urban demographics. (This [business advisory](#) highlights some of the risks associated with Chinese platforms.) Collaborating with Key Opinion Leaders (KOLs) and influencers further enhances visibility and credibility, helping brands connect with their audience in a more authentic and impactful way.

Offline engagement is equally important. Participation in trade shows, beer festivals, and tasting events across first- and second-tier cities provide imported brands with valuable opportunities to interact directly with consumers, gather market feedback, and build relationships with distributors. These events not only showcase products but also reinforce brand identity and help craft beer brands respond to evolving market trends.

- **Trade Shows**

Trade shows are a vital platform for industry players to exchange information, stay updated on market trends, and showcase their offerings. These events typically feature beer, brewing ingredients, and brewing equipment, along with seminars and beer competitions to foster engagement. While trade shows primarily target professional buyers, many are open to consumers free of charge, creating a lively atmosphere where beer enthusiasts can sample various products.

Two major beer-focused trade shows in China include:

[Craft Beer China Conference and Exhibition \(CBCE\) in Shanghai](#)

CBCE is the largest professional craft beer conference and exhibition in Asia. It showcases imported craft beer, domestic

Chinese craft beer, and raw materials and equipment for brewing. It is considered a must-attend event for major players in the beer industry. The next CBCE is scheduled for April 6–9, 2026, at the Shanghai New International Expo Centre.



Beijing International Craft Brewing Exhibition (Beijing Brew)

Beijing Brew is smaller in scale and influence compared to CBCE, with a focus on the North China market. The organizers actively seek participation from U.S. craft brewery professionals to share insights on market trends. The next Beijing Brew is scheduled for March 18-20, 2026, at Beijing Etrong International Exhibition & Convention Center.

• Beer Festivals

Beer festivals have gained significant popularity across various cities in China, offering a more casual and entertaining experience compared to trade shows. These events are typically held over weekends or holidays, making them accessible to a broader audience. Organizers often incorporate music and dance performances, interactive games, and diverse food offerings to encourage attendees to stay longer and fully immerse themselves in the experience. For breweries and beer brands, festivals provide an excellent opportunity to engage directly with consumers, allowing attendees to explore new beer options, sample diverse styles, and discover offerings that may not be readily available in their hometown. This direct interaction helps breweries and beer importers build brand loyalty, gather valuable consumer feedback, and expand their presence in local markets. While local Chinese breweries dominate the booths at beer festivals, beer importers also participate by sending distributors to represent their brands. Major beer festival organizers are very welcoming of foreign breweries, particularly U.S. breweries..

The most popular and influential beer festivals in China are held in first-tier and emerging first-tier cities such as Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Nanjing, Hangzhou, and Wuhan—locations that represent the strongest market potential and growth prospects for the beer industry. Among these events, the 8x8 Beer Festival, organized by Beijing-based craft brewery Jing-A, stands out as one of the most influential craft beer gatherings in China. Each year, Jing-A pairs eight Greater China breweries with eight overseas



8 家中国精酿厂牌
Breweries from China
8 款合酿啤酒全球首发
New Collab Beers
8 家北欧精酿厂牌
Breweries from Scandinavia
136 款精选新鲜直达
Unique Beers to Try



The Poster of 2025 8x8 Beer Festival

counterparts to co-create eight new brews. The festival features these collaboration beers alongside flagship offerings from participating breweries. Held annually since 2017 in Beijing, 8x8 serves as a platform for cultural and creative exchange within the craft beer community, offering U.S. breweries a unique opportunity to build brand awareness, engage directly with Chinese consumers, and connect with local industry players.

Recommendations:

To strengthen their position in the Chinese market, U.S. brewers should leverage their core strengths—diverse beer styles, innovative brewing techniques, and strong cultural branding. These qualities resonate particularly well with younger Chinese consumers who are increasingly seeking premium, unique, and globally inspired experiences. By emphasizing not only quality and flavor, but also storytelling and lifestyle branding, U.S. beer can stand out in a crowded market.

To better align with local preferences, breweries should tailor select products to align with Chinese consumer tastes. This includes incorporating visually appealing packaging and popular flavor profiles, such as fruity, floral, or tea-infused beers. Additionally, while still a niche market, the low and non-alcoholic segment is poised for growth, driven by increasing demand from health-conscious consumers.

To maintain and expand market share, U.S. craft beer brands balance competitive pricing with perceived quality. As price sensitivity rises amid economic headwinds, while the premium beer segment continues to grow, offering a diversified product lineup across multiple price points is essential. Brands should emphasize distinct value propositions—such as flavor innovation, product origin, design, or exclusivity—to justify consumer spending. Award-winning beers often perform well and command higher price points due to their recognition and perceived quality.

Additionally, U.S. brewers are encouraged to participate in trade shows, beer festivals, and tasting events in China to gather firsthand market intelligence, build importer and distributor relationships, and connect directly with consumers. Finally, investing in digital outreach—particularly via e-commerce platforms, social media, and KOL (Key Opinion Leader) collaborations—can significantly boost brand visibility and consumer engagement, especially in China’s fast-moving, trend-driven digital landscape.

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Attachments:

No Attachments.