

**Voluntary Report** – Voluntary - Public Distribution

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**Report Name:** Sweet Success Unlocking Opportunities in China Evolving Confectionery Market

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**Report Highlights:**

China's confectionery market, valued at over \$12 billion in 2024, is rapidly evolving, driven by health-conscious consumption, premiumization, and product innovation. Imports surged nearly 40 percent in early 2025, reflecting strong momentum despite economic headwinds. Seasonal consumption, especially around holidays, remains a key sales driver, while younger consumers are reshaping preferences toward dark chocolate, functional ingredients, and mini formats. U.S. exporters face challenges such as high tariffs and competition from European and Southeast Asian brands but can capitalize on growing demand for organic, low-sugar, and functional products.

## Overview

China's confectionery market ranks among the world's most dynamic and expansive. In 2024, its value exceeded \$12 billion and continues to grow steadily at an annual rate of four percent to five percent. Despite headwinds from subdued consumer spending, the sector is undergoing a notable transformation, characterized by increasing functionalization, premiumization, and diversification. These shifts are driven by product innovation and rising demand for health-conscious offerings, signaling a maturing market with evolving consumer preferences.

China ranked as the world's fifth-largest importer of confectionery products in 2024, with imports totaling \$1.6 billion. The upward momentum has continued into 2025, with imports during the first seven months rising by more than 40 percent year-on-year.

Candy and chocolate importers in China are primarily concentrated in first-tier cities such as Beijing, Shanghai, Guangzhou, and Shenzhen. Due to seasonal demand and logistical considerations, particularly the need to avoid transporting heat-sensitive products during warmer months, the peak import period, especially for chocolate, spans from September through February. This window aligns with a succession of holidays beginning in October and culminating with Valentine's Day in February, making holiday consumption a critical driver of sales.

In addition to Western holidays popular in first- and second-tier cities—such as Halloween, Christmas, and Valentine's Day—the traditional Chinese Spring Festival represents another major sales peak. Candy, which symbolizes sweetness and happiness, holds deep cultural significance during this time. Families traditionally stock up on candy and chocolate for the Spring Festival, both for personal enjoyment and as festive gifts. Packaging plays a vital role in consumer choice, with red and gold designs favored for their association with celebration, prosperity, and good fortune.

Women represent the dominant consumer group in China's confectionery market, accounting for approximately 70 percent of total consumption. Meanwhile, dark chocolate is most popular among young adults aged 18 to 30, who are drawn to its health and lifestyle appeal. In contrast, children tend to favor novelty products, which feature playful designs, vibrant packaging, and interactive formats.

### **China Confectionery Market Snapshot**

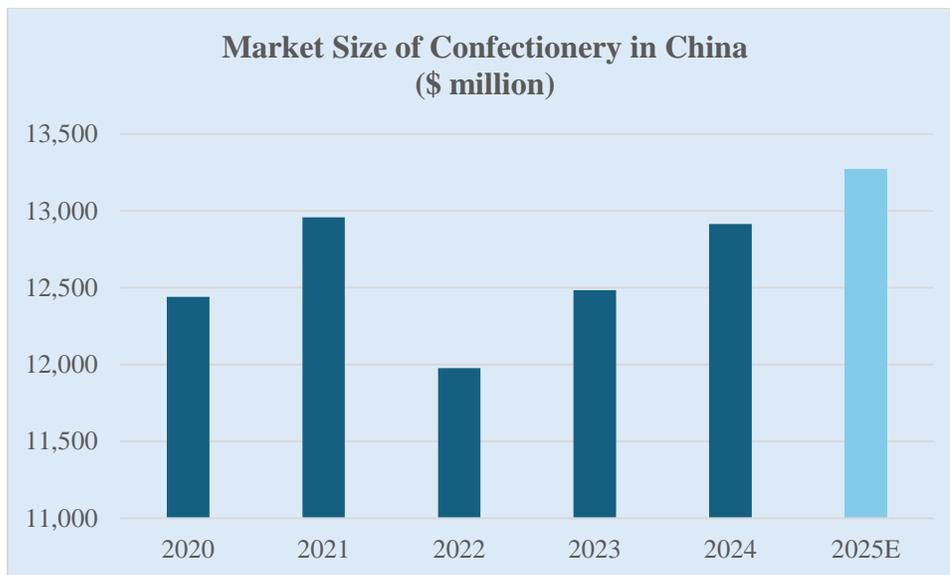
- Total confectionery market size surpassed \$12 billion in 2024.
- Confectionery market is expected to grow four percent to five percent year-on-year.
- **Areas for Growth**
  - Dark chocolate
  - Organic confectionery
  - Functional confectionery
  - Mini-sized products
- **Top 5 Confectionery Company in China:** Mars Inc; Nestle SA; Ferrero; Guangdong Strong Group; Want Want Holdings Ltd
- **Top 10 China Retailers** Wal-Mart; Yonghui; RT-Mart; CR-Vanguard; Hema Fresh; Wu-Mart; Lianhua Supermarket; Jiajiayuan; Zhongbai; Qiandama

**Source: Euromonitor and China Chain Store & Franchise Association**

With its vast consumer base, China ranks among the world’s largest candy markets. However, the sector faces intense competition as both domestic and international brands compete for market share. Consumer preferences are shifting away from traditional hard candies and milk-based sweets toward functional and sugar-free alternatives, reflecting growing health awareness. Packaging innovation continues to play a critical role in attracting younger consumers, with visually engaging and trend-driven designs driving impulse purchases. Flavor profiles have also diversified, evolving from single-fruit varieties to more complex blends—including mixed fruit combinations and tea-infused options. Among all categories, gummy candy stands out for its rapid growth, outpacing other segments in both sales and consumer engagement.



Compared to candy, imported chocolate dominates the China market with brand reputation and product origin playing a pivotal role in purchasing decisions. European chocolates, in particular, enjoy widespread popularity due to their perceived quality, craftsmanship, and heritage. Meanwhile, chocolate consumption in China is evolving beyond traditional holiday gift-giving into a staple of everyday indulgence. New consumption scenarios now include fitness and sports recovery, stress relief, mood enhancement, and casual sharing among friends—reflecting deeper lifestyle integration and growing demand for functional and emotionally resonant products. Additionally, the rapid expansion of the ice cream and baking industries has further fueled chocolate consumption, positioning them as key channels for market growth.



Source: Euromonitor

## Market Trends

China's imports of confectionery products include an array of products. The chart below represents the main products imported under this category.

China's Top Confectionery Imports in 2024		
HS Code	Product Description	Import Value(\$ million)
170490	Sugar Confectionary (Including White Chocolate)	348
180690	Cocoa Preparations	331
180620	Chocolate >2Kg containers	132
180632	Chocolate ≤2kg, Not Filled	111
180631	Chocolate ≤2kg, Filled	76
170410	Chewing Gum	11

Source: TDM

China's confectionery market is evolving toward premium, health-conscious, and innovative products, with strong growth in dark and organic chocolate, low-sugar options, and mini formats. Brands are responding with upscale offerings, IP collaborations, and packaging tailored for everyday indulgence and active lifestyles.

**Premiumization:** Consumers are increasingly drawn to high-end and imported chocolate brands, particularly those featuring distinctive flavors, sustainable sourcing, and health-forward ingredients. These premium offerings demonstrate greater resilience during economic downturns, whereas mid-tier products tend to be more susceptible to declining sales.

**Health-conscious consumption:** The market is shifting toward low-sugar, sugar-free, functional, and organic confectionery. Products with high cocoa content, especially dark chocolate around 70 percent, are gaining popularity, while those made with compound cocoa butter equivalents are falling out of favor in major cities. Organic chocolate and candies made with 100 percent fruit juice are seeing strong growth. Confectionery is also evolving into a functional carrier, with added probiotics, high-fiber ingredients, or oat milk-based formulations aligning with wellness trends.

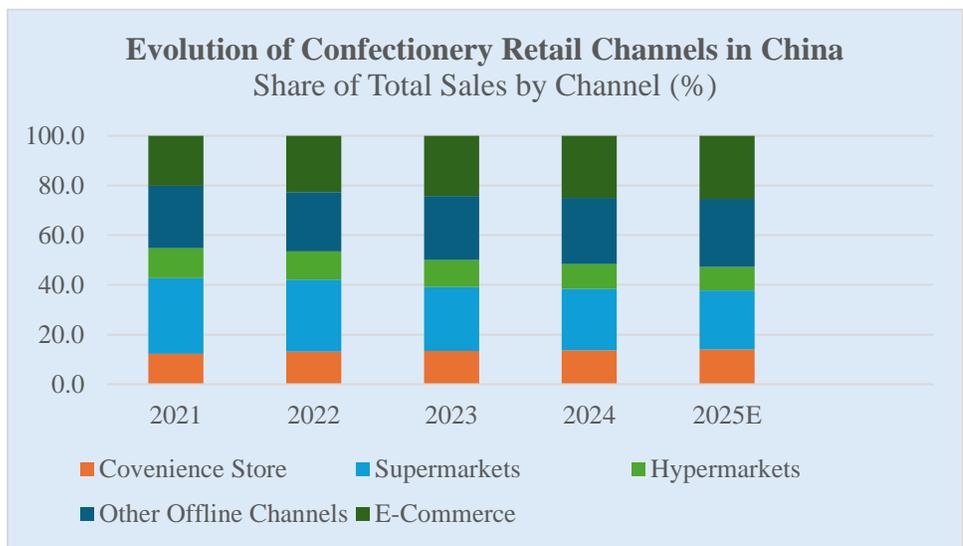
**Product innovation:** In addition to traditional formats, brands are introducing chocolate-coated nuts and collaborating with popular IPs to appeal to younger consumers. However, chocolate-covered dried fruits remain less favored among Chinese consumers compared to other formats.



**Packaging evolution:** Chocolate consumption is expanding beyond seasonal gifting to everyday indulgence and functional occasions such as sports nutrition. To support portion control and align with health trends, brands are launching small format, individually wrapped products. Mini-sized items under 10 grams are experiencing rapid sales growth.

## Distribution Channels

China’s confectionery retail landscape is undergoing a gradual yet notable transformation, driven by the steady rise of e-commerce and a relative decline in traditional offline channels. Despite this shift, offline retail remains the dominant sales avenue, accounting for over 70 percent of confectionery product sales. Snack shops are rapidly expanding in second- and third-tier cities, where small-package formats help lower unit prices and appeal to price-sensitive consumers. Convenience stores also play a pivotal role in offline distribution, offering fast product turnover, innovative flavors, and visually striking packaging that resonates with younger demographics. These outlets serve as effective testing grounds for new product launches. Meanwhile, membership-based warehouse stores primarily distribute bulk and imported confectionery items, targeting mid-to-high-end consumers.



Source: Euromonitor

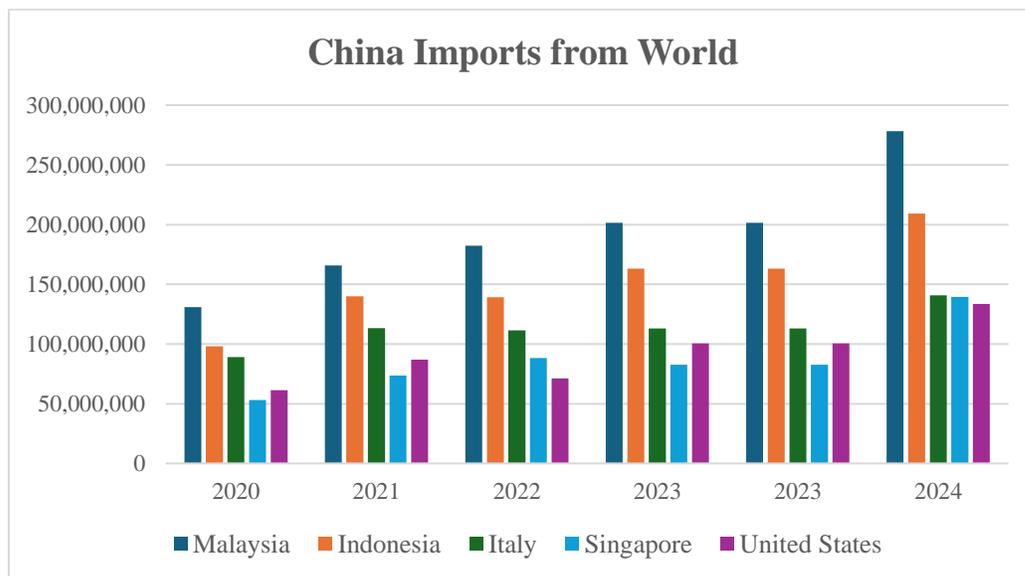
Online sales have been growing steadily and are projected to exceed 25 percent of total confectionery sales by 2025. Live-streaming e-commerce now accounts for over 30 percent of online sales, with short-video platforms fueling this momentum. Notably, confectionery sales on Douyin rose 19.93 percent year-over-year from January to May 2025.

Social media continues to be a powerful driver of online candy purchases, with consumers heavily influenced by key opinion leaders (KOL) reviews, product recommendations, and user-generated content.

## Competition

American confectionery products continue to navigate a complex and increasingly competitive landscape in China. In 2024, the United States ranked as China's fifth-largest supplier of imported confectionery. By the first nine months of 2025, it had risen to fourth place, with exports exceeding \$90 million. However, this figure represents an 11 percent year-on-year decline, driven by persistent challenges such as high tariffs and an uncertain bilateral trade environment.

Meanwhile, amid broader economic headwinds, confectionery imports from Southeast Asia have experienced notable growth over the same period, capitalizing on their cost advantages and expanding market presence.



Source: TDM

Chinese consumers' rising health consciousness and demand for product innovation have reshaped market dynamics. Domestic brands have significantly improved in quality and responsiveness to local preferences, while European confectionery products dominate the premium segment. These competitors have gained substantial market share by emphasizing high cocoa content, incorporating more nuts, and offering products in refined, authentic packaging that resonates with health-aware and quality-driven consumers.

American confectionery, often perceived as high in sugar and calories, must also contend with shifting dietary preferences. Chinese consumers are increasingly mindful of sugar intake and seek snacks that align with wellness trends. In addition to competing with other imported confectionery, U.S. products must vie for attention within a highly diversified retail environment, where snack budgets are distributed

across a wide array of alternatives—from traditional Chinese sweets to functional snacks and novelty items.

Nevertheless, iconic American brands such as Hershey’s, Dove, Ghirardelli, and M&Ms continue to enjoy strong brand recognition and consumer trust in China. In addition, some organic candy brands are gaining traction through cross-border e-commerce channels, helping to fill a notable gap in the domestic market. Organic confectionery remains scarce in China, and its emergence offers a timely solution for health-conscious, premium consumers seeking cleaner ingredient profiles and differentiated offerings.

### Market Entry Tips

Successfully entering China’s confectionery market requires a nuanced understanding of consumer preferences, regulatory frameworks, and retail dynamics. U.S. exporters should consider the following strategies to enhance market access and brand competitiveness:

- **Explore Cross-Border E-Commerce Channels**

The channel is particularly effective for niche products such as organic or specialty confectionery, which remain underrepresented in domestic offerings and appeal to health-conscious, premium consumers. For further insights, please refer to the [China Cross-Border E-commerce Market Opportunities for US Agricultural Products](#) and [China E-Commerce Report - Strategic Insights for US Food Agricultural and Beverage Exporters](#).

- **Invest in Premium Packaging and Localization**

Visually appealing, culturally resonant packaging enhances shelf presence and consumer engagement. Seasonal themes, auspicious colors, and authentic flavor profiles can help products connect with local tastes and traditions.

- **Leverage Brand Heritage and Trust**

Iconic American brands with strong global reputations can capitalize on their legacy by emphasizing quality, safety, and authenticity. Storytelling around brand history and values resonates well with Chinese consumers, especially in the premium segment.

- **Using social media platforms**

Platforms such as Xiaohongshu (Red Book) and WeChat are powerful tools for product promotion. Younger Chinese consumers increasingly rely on social media to discover new products and share their experiences. Collaborating with key opinion leaders (KOLs) can amplify brand visibility and credibility.

For general guidance on import procedures, consult the [Exporter Guide Annual](#). Exporters seeking detailed information on regulations, documentation, and certification requirements should review the [FAIRS Country Report Annual](#) and the accompanying [FAIRS Export Certificate Report Annual](#).

## Major Trade Shows Related Beverage in China

China remains a high-potential market for imported confectionery products, including chocolate, which are recognized for their premium quality, product differentiation, and strong brand reputation. For U.S. confectionery brands, participating in trade shows presents a strategic opportunity to enhance visibility, engage with local buyers, and establish a foundation for long-term market entry. Maintaining a consistent presence is essential to staying competitive as market dynamics continue to evolve. Major confectionery trade shows in China include:

- Food and Drink Fair – Chengdu, Sichuan Province, March 26 to 28, 2026
- Anuga Select China – Shenzhen, April 27 to 27, 2026
- Salon International de L'alimentation (SIAL) - Shanghai, May 18 to 20, 2026

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### **Attachments:**

No Attachments.