



PROWINE INTERNATIONAL BUSINESS REPORT CHINA 2025

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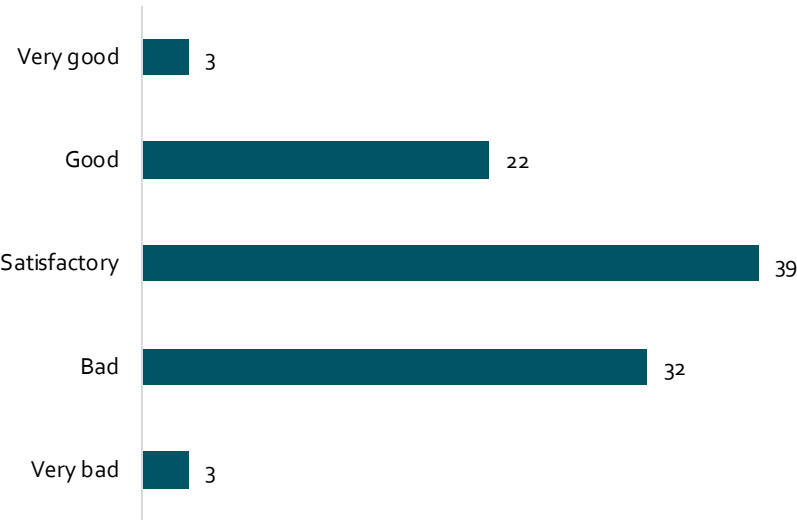
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CURRENT BUSINESS CONDITION & FUTURE OPPORTUNITIES

Business Condition in 2024 & expectation for 2025

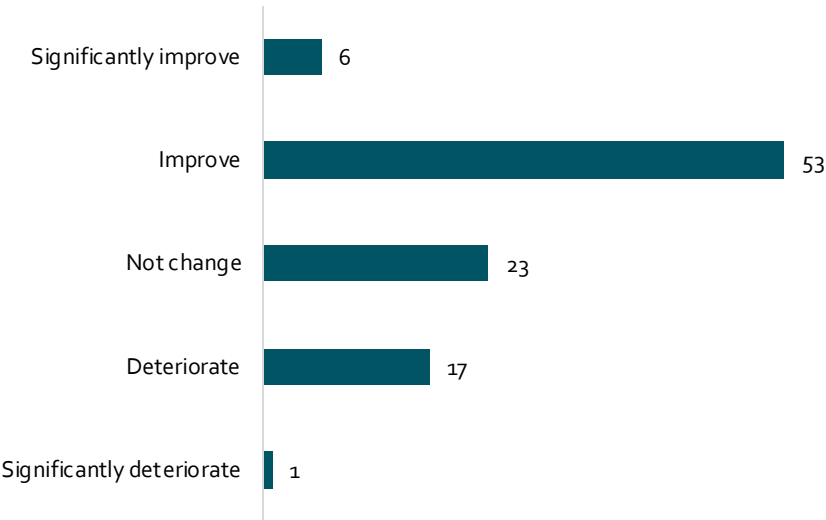
How do you assess the **economic condition** of your company in 2024?

Percentage of trade and producers.



How will the economic condition of your company **change within 2025**?

Percentage of trade and producers.

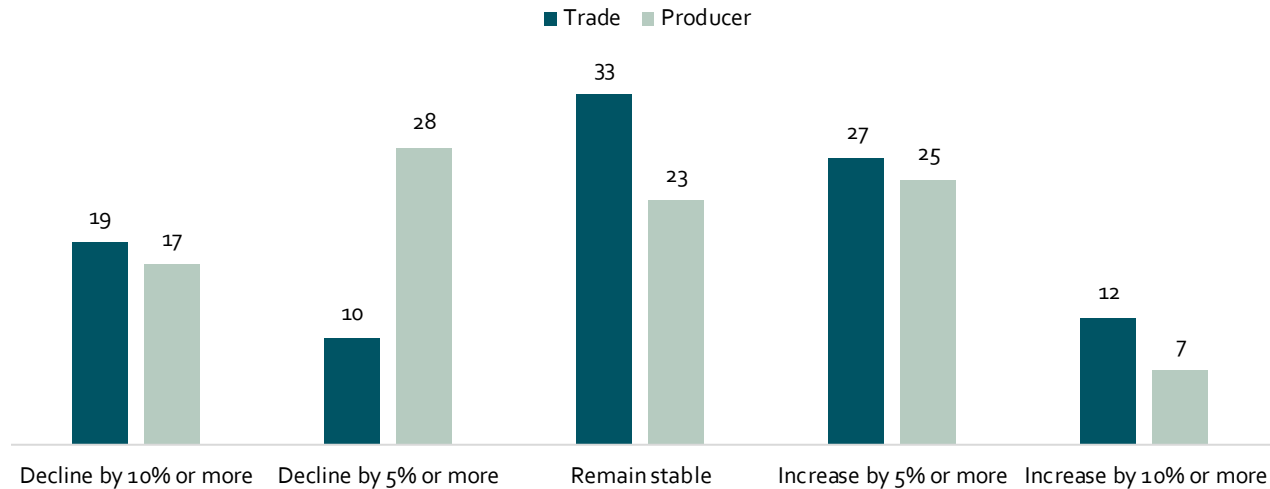


The current market conditions remain challenging. Most producers and trade professionals assess their economic situation as ranging from poor to satisfactory, with only a quarter describing it as good or very good. However, there is a degree of optimism—more than half (53%) anticipate an improvement in their company’s economic position by 2025. Conversely, 18% foresee further deterioration. Trade and producers do not differ significantly.

Market development wine sales by end of 2025

What is your expectation for wine sales in China **by the end of 2025**?

Percentage of producers and trade experts



For 2025, Chinese producers experts expect little change in the market development for wine, with a slight tendency towards decline. Trade experts, however, are somewhat more optimistic, with 39% expecting an increase of 5% or more.

Alcoholic beverages – expectations by 2027

Trade

How do you expect alcoholic beverages to perform in China **by 2027**?

Percentage of trade; the remainder to 100% represents 'don't know' responses

Category	Sales will increase	Sales will stay constant	Sales will decline
Domestic National Wine	57	10	25
RTD, cocktails	42	20	25
Imported sparkling wine (Champagne, Prosecco, Cava)	40	25	30
Cider, Perry	39	23	22
Domestic National Beer	39	29	14
Imported International Beer	28	28	25
Alcoholic Beverages in China - Overall	27	25	38
Imported still wine	24	24	47
Chinese Baijiu	16	22	49
Imported International Spirits	16	20	52



Trade

Trade experts see positive sales prospects for **domestic Chinese wine, RTDs & cocktails, and imported sparkling wine.**

Additionally, **Cider, Perry, and domestic national beer** have a higher share of positive expectations than those predicting a decline.

In contrast, imported **international spirits, imported still wine, and Chinese Baijiu** are expected to decline until 2027.

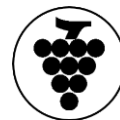
Alcoholic beverages – expectations by 2027

Producers

How do you expect alcoholic beverages to perform in China **by 2027**?

Percentage of producers; the remainder to 100% represents 'don't know' responses

Category	Sales will increase	Sales will stay constant	Sales will decline
RTD, cocktails	53	17	13
Cider, Perry	53	17	13
Imported sparkling wine (Champagne, Prosecco, Cava)	41	21	21
Domestic National Beer	40	29	14
Domestic National Wine	31	18	39
Imported International Beer	21	24	32
Alcoholic Beverages in China - Overall	21	21	51
Chinese Baijiu	19	21	49
Imported International Spirits	18	20	43
Imported still wine	14	24	48



Producers

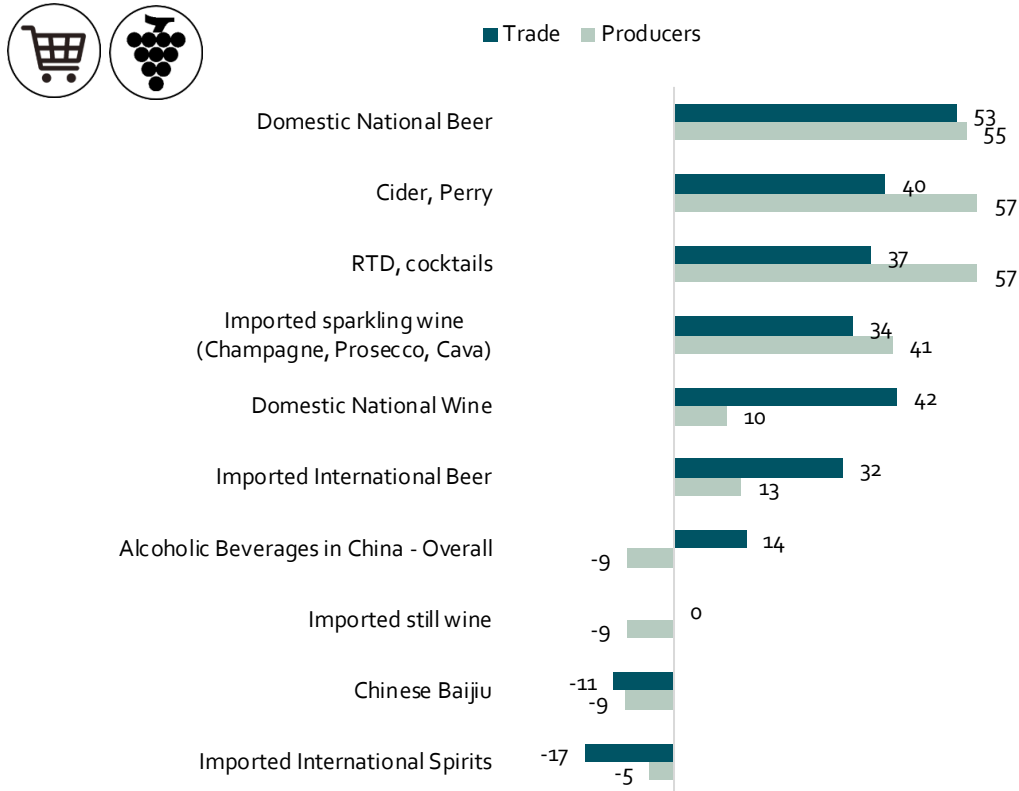
Wine producers expect the strongest growth in **RTDs and cocktails**, followed by **Cider and Perry**. Sales of imported **sparkling wine** are also projected to increase over the next three years.

Overall, half of wine producers anticipate a **decline in alcoholic beverage sales**, while 21% expect growth. There is a general **trend towards domestic products**, particularly national beer and wine.

Regarding imported international spirits and still wine, the proportion of producers expecting a decline is equal to those predicting either an increase or stable sales. Similarly, almost half of Chinese wine producers foresee a decline in Baijiu sales.

How do you expect alcoholic beverages to perform in China **by 2027**?

Each bar represents the net difference between the percentage of experts expecting growth or stability in a category and those anticipating a decline



How to read the chart:

- Categories are ranked by average expected performance from trade and producers.
- Each bar represents the net difference between the percentage of experts expecting growth or stability in a category and those anticipating a decline.

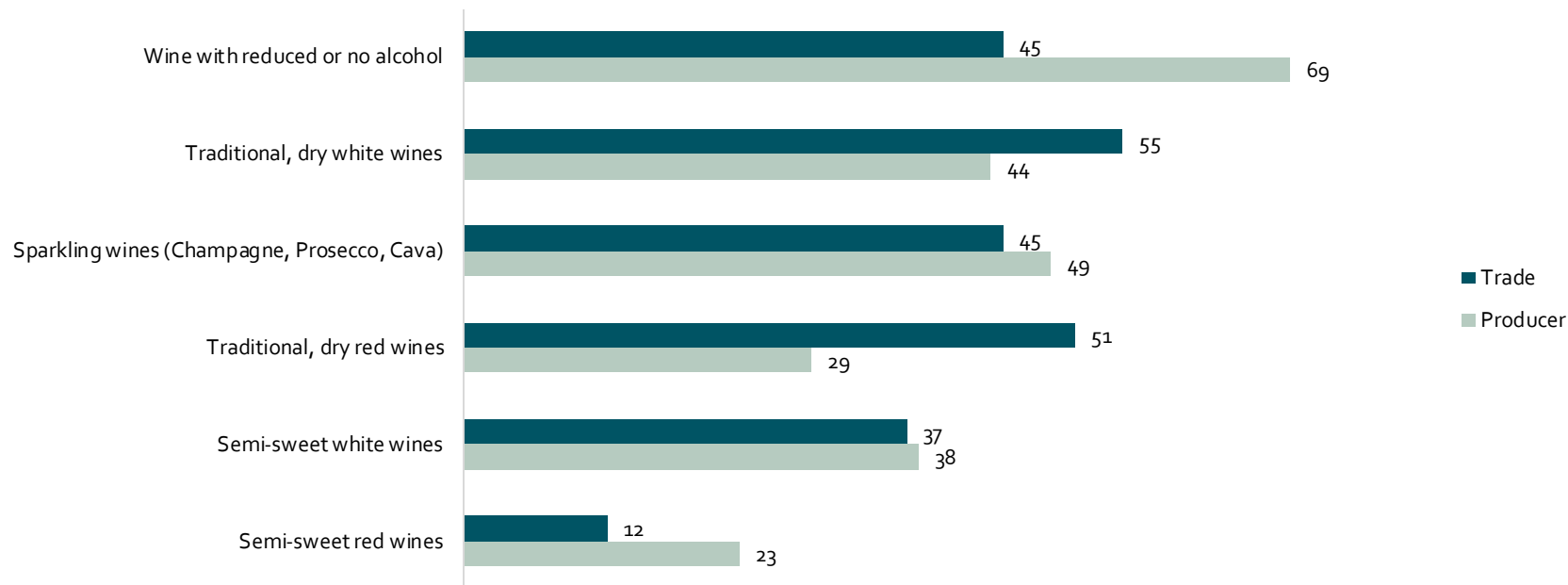
The chart illustrates that **trade experts and wine producers generally align in their expectations.**

However, trade experts are more optimistic about the sales outlook for domestic Chinese wine, imported beer, and the overall development of alcoholic beverages. In contrast, wine producers show slightly greater optimism regarding Cider, Perry, RTDs & cocktails, and imported sparkling wine.

WINE AND SPIRITS TRENDS

Which wine types do you expect to perform well by 2027?

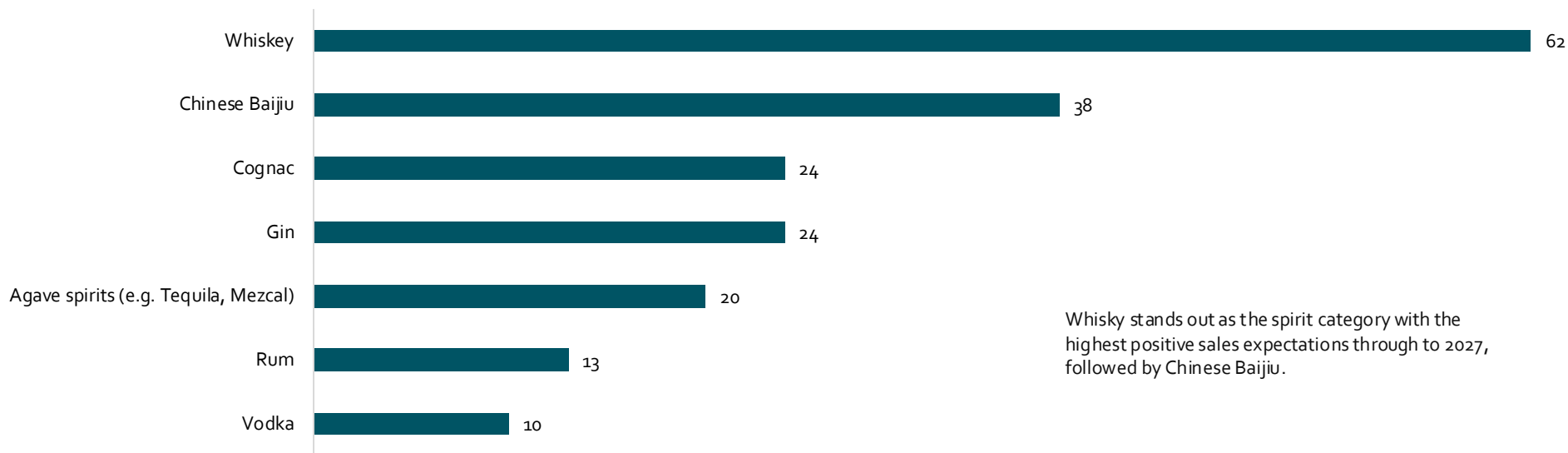
Percentage of producers and trade who expect type to perform well



Dry white wines top the list of trending wine styles through 2027, with both trade and producers ranking them ahead of reds. Sparkling wines follow, with producers even more optimistic than the trade. Low- and no-alcohol wines are gaining ground, especially among producers (69%). Semi-sweet whites show potential, while semi-sweet reds are seen as less promising in the Chinese market.

Which types of spirits do you expect to perform well by 2027?

Percentage of producers and trade who expect type to perform well



Whiskey stands out as the spirit category with the highest positive sales expectations through to 2027, followed by Chinese Baijiu.

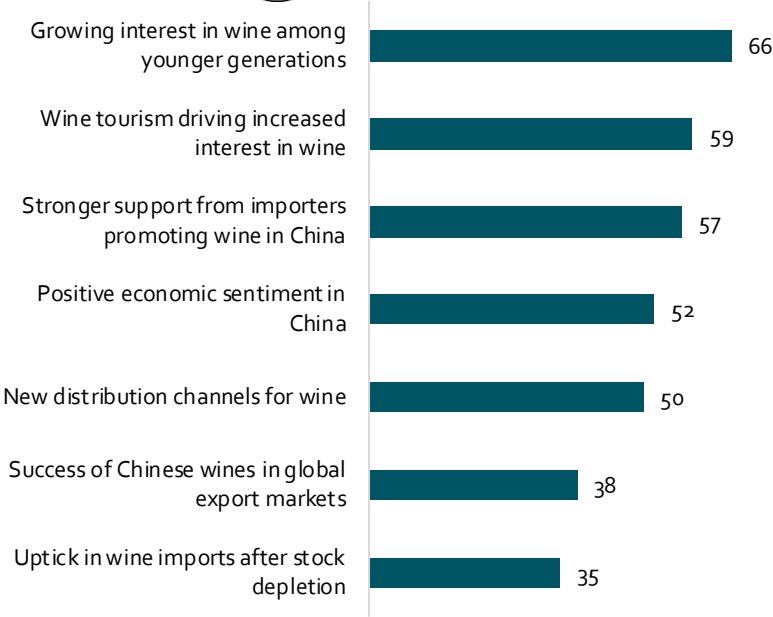
DRIVERS FOR GROWTH OF WINE SALES IN CHINA

What opportunities do you see for wine sales?

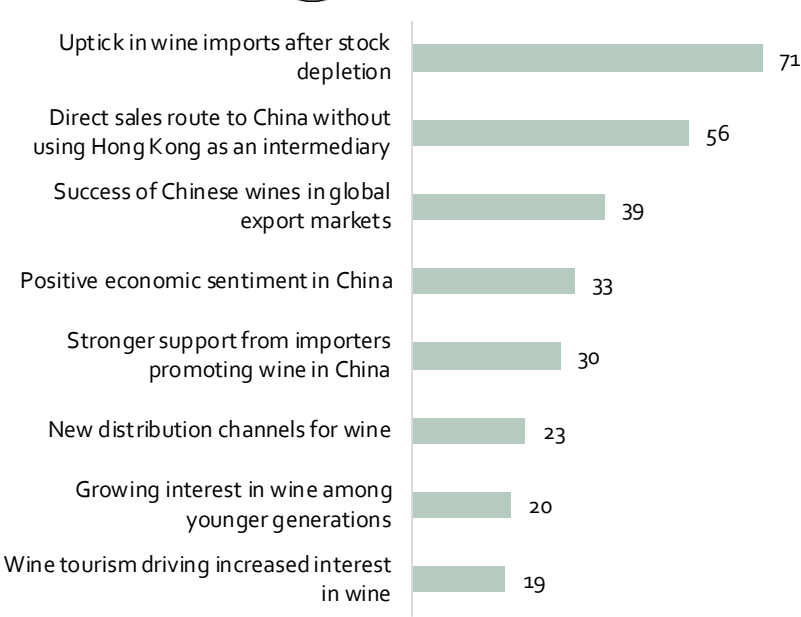
Percentage of producers and trade experts



Trade



Producers



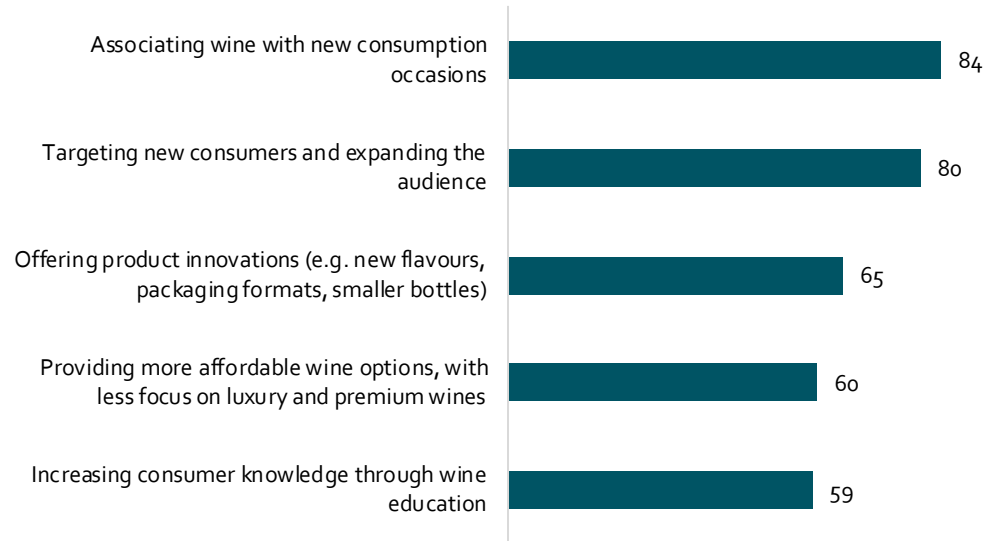
Domestic trade experts identify growing interest in wine among younger generations and wine tourism as key opportunities to drive wine sales.

International producers anticipate an increase in imports once existing stock has been depleted, with a shift towards direct imports to China instead of routing through Hong Kong. Both trade and producers see a recovery of the Chinese wine market as closely linked to an improvement in overall economic sentiment in China.

Drivers for market development – wine sales in China

How important do you consider the factors for future growth?

Percentage of producers and trade experts



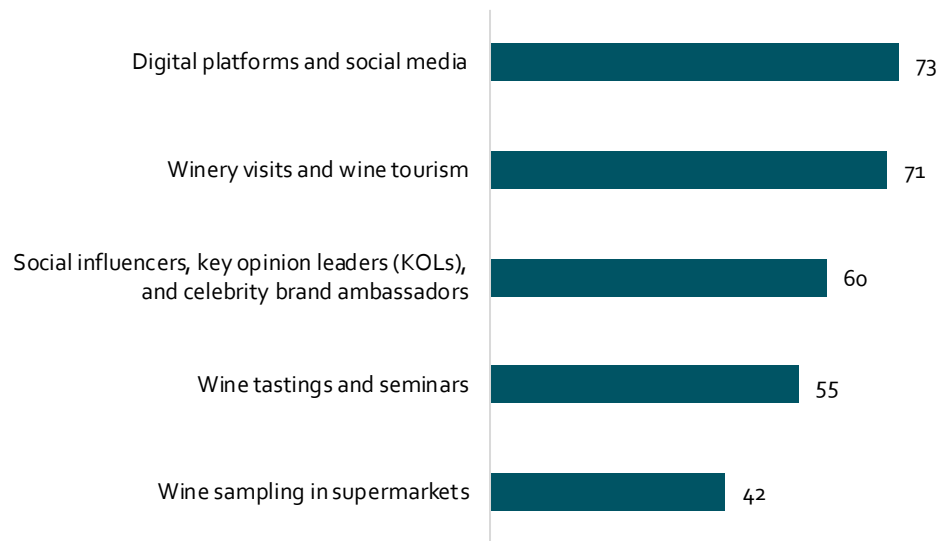
Growth is expected from new occasions and new consumers.

Associating wine with new consumption occasions and targeting new consumer segments are identified as the two key drivers for the future growth of wine sales in China.

Beyond these priorities, product innovation, affordable wine options and increasing consumer wine knowledge are also considered important factors.

How effective are different ways to educate Chinese consumers about wine?

Percentage of producers and trade experts



Expert recommendations can be categorised into digital exposure and personal experience.

Digital platforms, social media, and influencers, along with winery visits and wine tourism, are considered the most effective ways to educate Chinese consumers about wine.

In contrast, wine tastings, seminars, and in-store wine sampling are seen as somewhat less important for consumer education in China.

Over the next three years, which sales channels for wine in China do you expect to grow the most?

Percentage of producers and trade experts



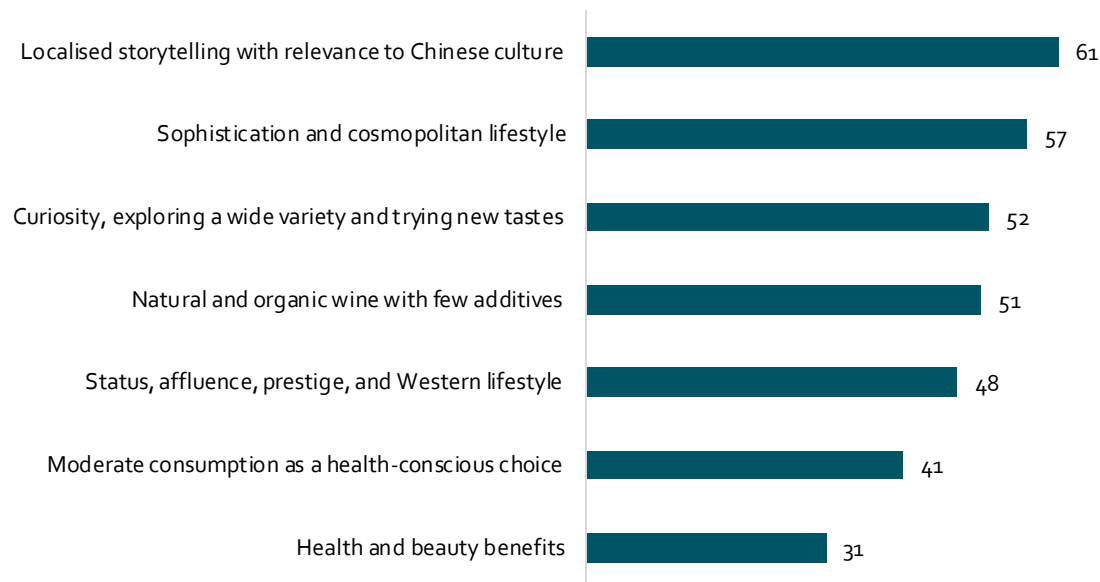
Digital sales channels, including social media, live streams, and key opinion leaders (KOLs), are expected to experience the strongest growth in China. These are followed by the on-trade sector and specialty wine shops.

Targeting new wine consumers

Image of wine

Which associations and emotions are most effective when targeting new wine consumers in China?

Percentage of producers and trade experts



According to expert opinions, various associations with wine can be leveraged to attract new wine consumers in China.

Localised storytelling that resonates with Chinese culture is the most effective approach, reinforcing strong growth potential for domestic Chinese wines.

Following this, **sophistication, a cosmopolitan lifestyle, and curiosity** rank as the second and third most influential factors.

Additionally, **natural and organic wines** with minimal additives are considered more appealing than marketing wine based on health-related benefits.

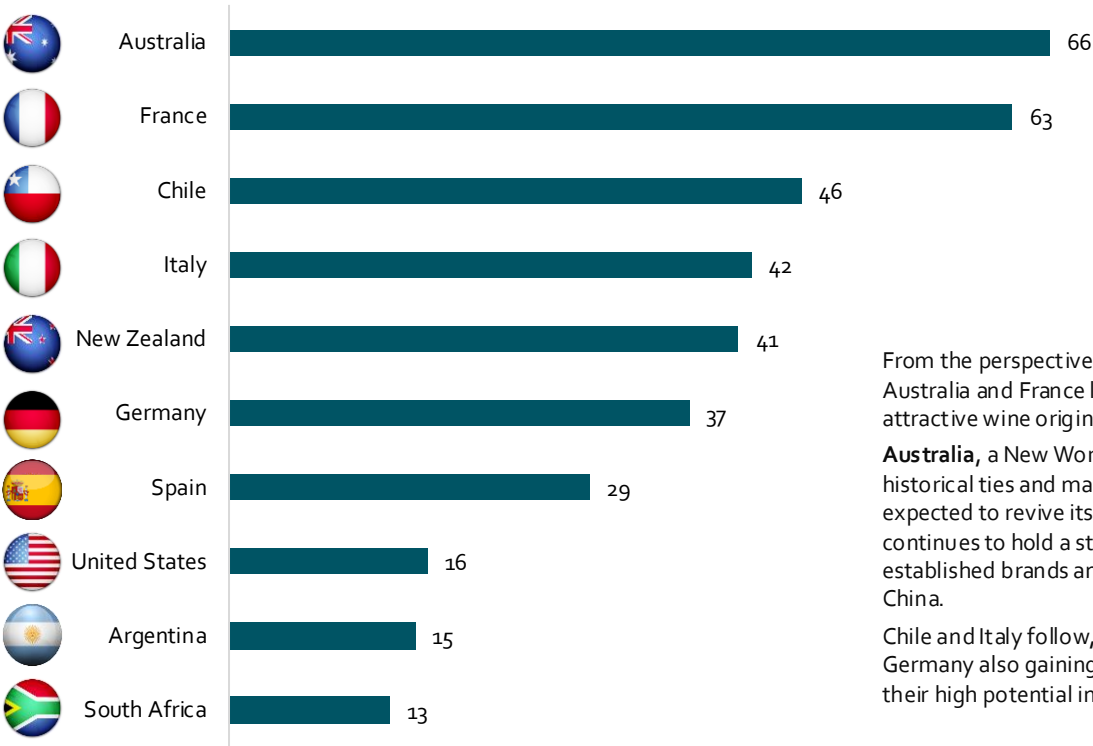
Meanwhile, status and the appeal of a Western lifestyle have declined in importance compared to a few years ago.

What origins of imported still wine do you expect to sell well in 2025?

Percentage of trade experts



Trade



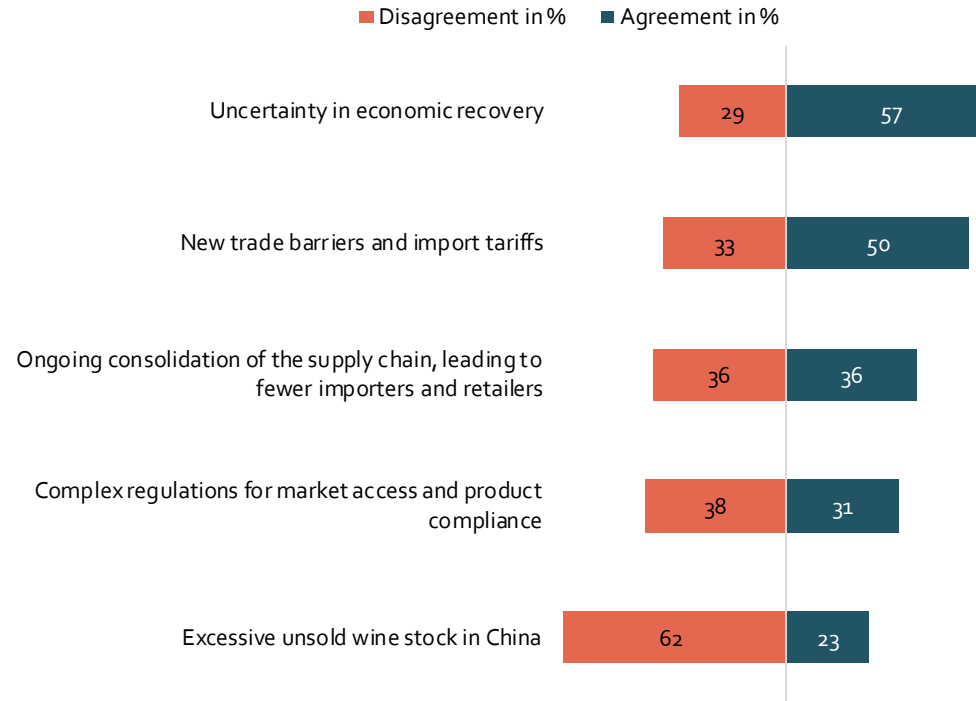
From the perspective of **Chinese trade experts**, Australia and France lead the list of most attractive wine origins for the Chinese market.

Australia, a New World producer with strong historical ties and market performance, is expected to revive its sales momentum. **France** continues to hold a strong position due to its well-established brands and renowned wine regions in China.

Chile and Italy follow, with New Zealand and Germany also gaining recognition, particularly for their high potential in the **white wine segment**.

What threats do you see for your company in wine sales?

Percentage of producers and trade experts



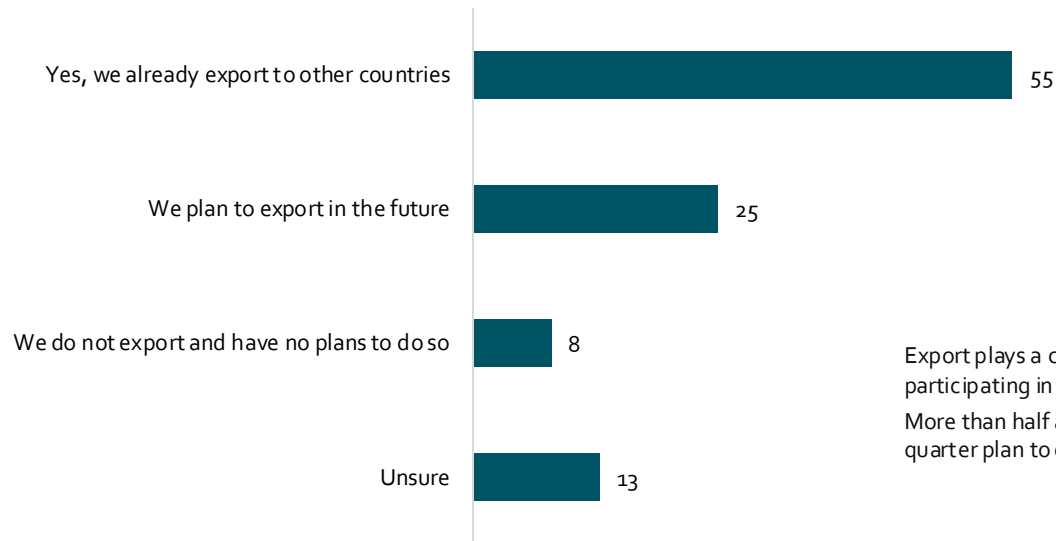
Several economic factors are perceived as threats to the growth of wine sales in China. The most significant concern is uncertainty surrounding China's economic recovery, which is further challenged by the potential risk of global trade wars. Additionally, one-third of experts anticipate ongoing supply chain consolidation, which could ultimately result in fewer importers and retailers. However, excessive unsold wine stock is not considered a major challenge.

EXPORT BY CHINESE WINE PRODUCERS

Wine export activities by Chinese wine producers

Do You currently export or plan to export wine to countries outside of China?

Percentage of Chinese wine producers



Export plays a crucial role for Chinese wine producers participating in the survey.

More than half already engage in exports, while a quarter plan to do so in the future.

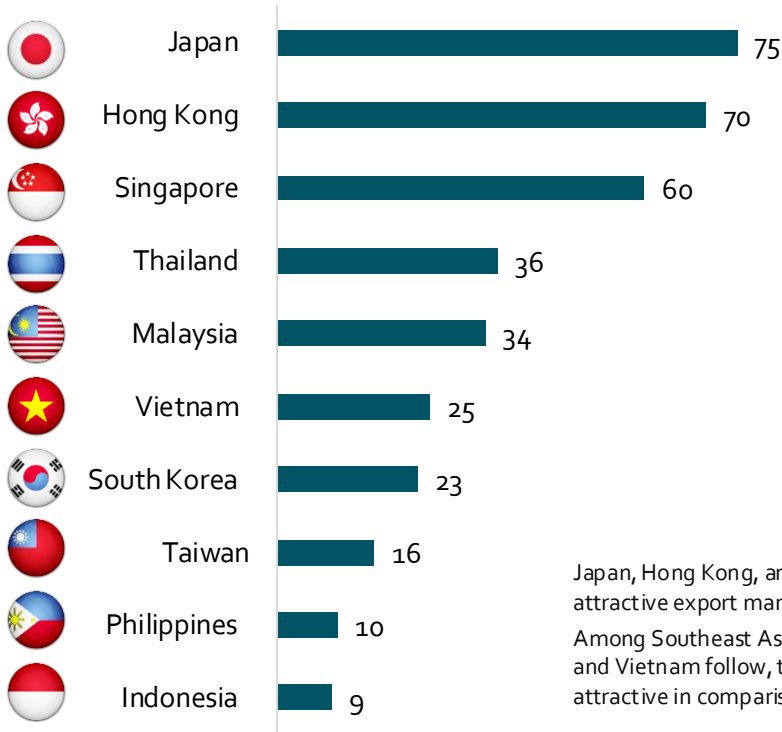
Export destinations for Chinese wine producers

Which export markets do you find most promising?

Percentage of Chinese producers



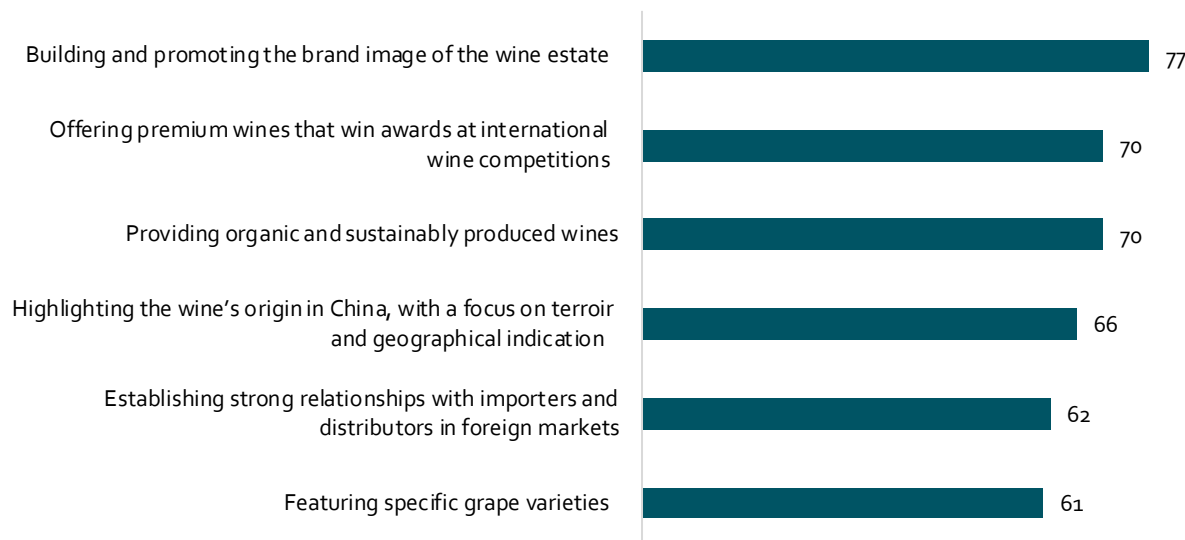
Chinese
Producers



Japan, Hong Kong, and Singapore are the most attractive export markets for Chinese wine producers. Among Southeast Asian countries, Thailand, Malaysia, and Vietnam follow, though they are considered less attractive in comparison.

How important are the following factors for export success?

Percentage of Chinese wine producers



Chinese wine producers consider multiple factors relevant to the success of their wine imports.

The **brand image** of the wine estate and **international awards** are regarded as slightly more important.

Interestingly, **organic and sustainable production** ranks as the third most important factor.

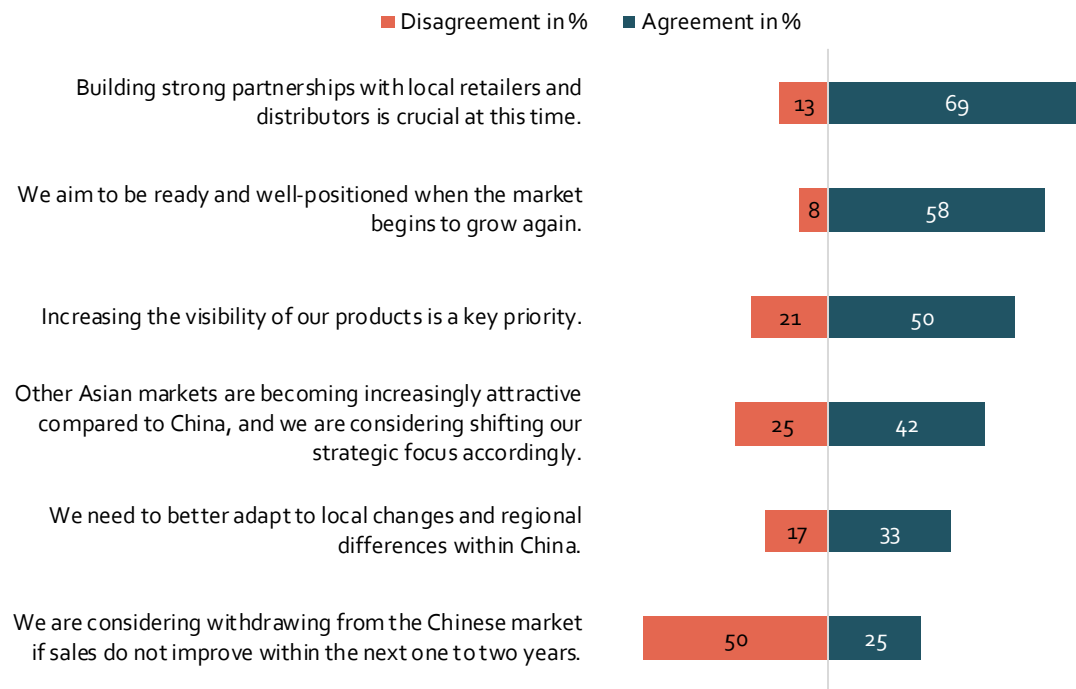
Meanwhile, **terroir and geographic indication of Chinese** wine origins are considered just as important as building strong **relationships with importers and trade**.

PRODUCERS EXPORTING TO CHINA AND ASIA

Strategy of producers exporting to China

How strongly do you agree with following statements about your current strategy in China?

Percentage of international producers exporting to China



The majority of wine producers exporting to China are committed to long-term strategic partnerships with Chinese trade. They remain optimistic about the future and aim to position themselves for when the market returns to growth.

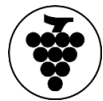
Less than half of the producers are considering shifting their strategic focus to other Asian markets, which are becoming increasingly attractive.

Only a quarter of producers are considering withdrawing from the Chinese market if conditions fail to improve within the next two years.

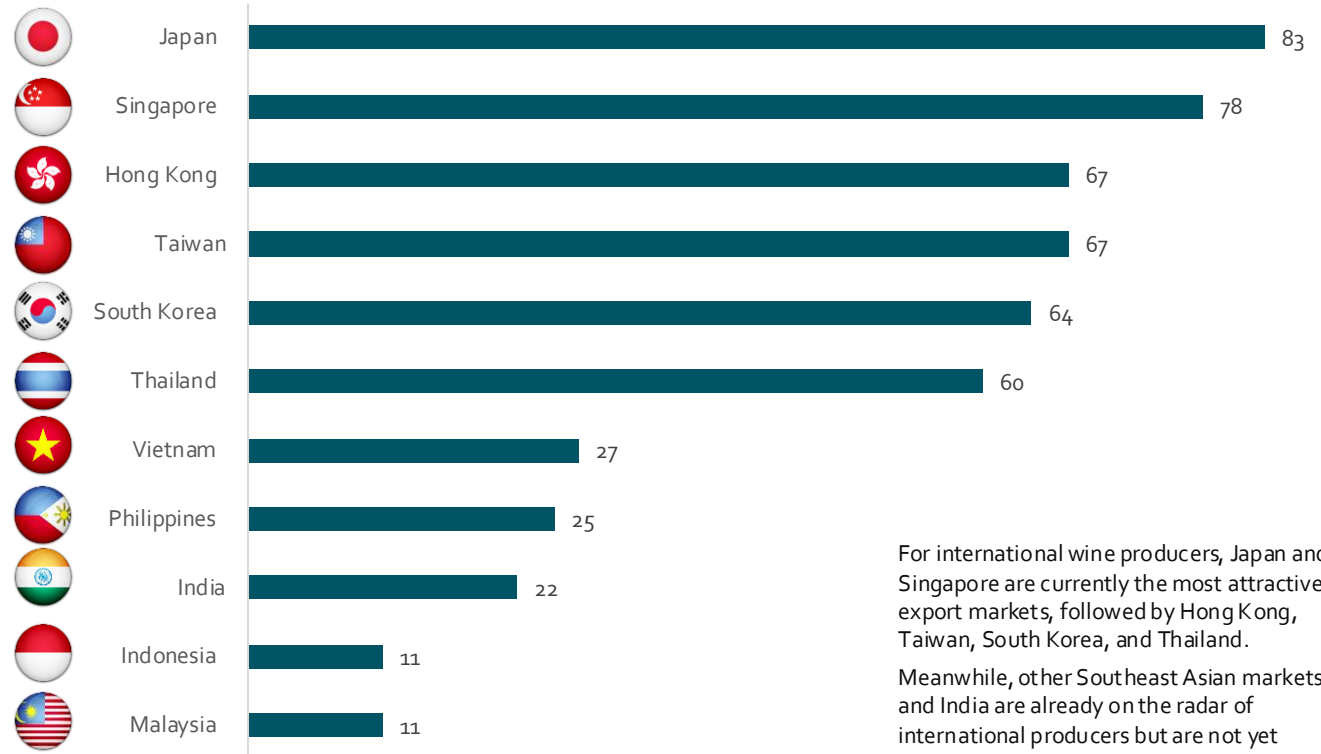
Other Asian market attractiveness for international wine producers

How would you rate the attractiveness of the following Asian export markets?

Percentage of international producers exporting to China



International
Producers



For international wine producers, Japan and Singapore are currently the most attractive export markets, followed by Hong Kong, Taiwan, South Korea, and Thailand.

Meanwhile, other Southeast Asian markets and India are already on the radar of international producers but are not yet considered as attractive.

METHOD

A total of 264 experts from trade and wine producers participated in the survey

Company type	Percent
Producer	38 %
Importer	19 %
Distributor	11 %
Retailer	9 %
On-Trade	8 %
Educator	6 %
Influencer	4 %
Wine Business Associations and others	4 %
Total	100 %

This is the first international survey to explore market trends in the Chinese wine sector from the perspective of both local trade and international producers. While the current sample of 264 respondents remains limited, future surveys aim to expand the database and provide deeper insights.

The survey was conducted in both Chinese and English between November 2024 and February 2025. Producers and trade professionals who collaborate with or exhibit at ProWine Shanghai were invited to participate.

Producers account for 38% of the sample, including approximately one-third of international producers who export to China. The trade experts represent a broad cross-section of the industry, spanning the entire supply chain—from importers, distributors, and retailers to on-trade professionals, educators, and influencers.



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