

Voluntary Report – Voluntary - Public Distribution

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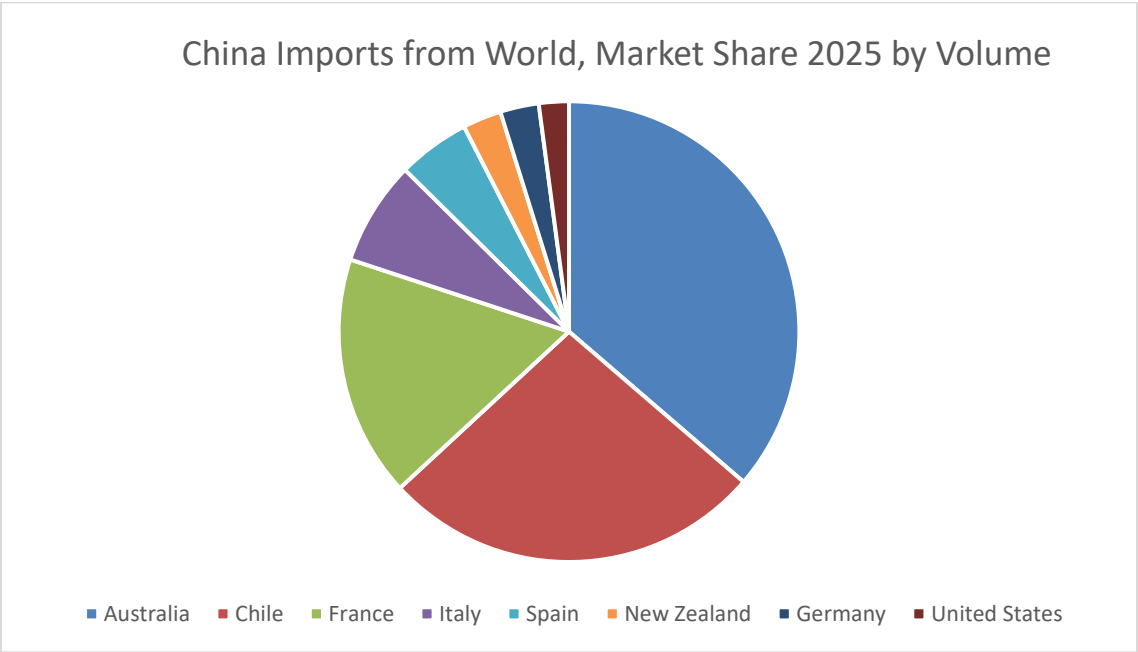
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Report Highlights:

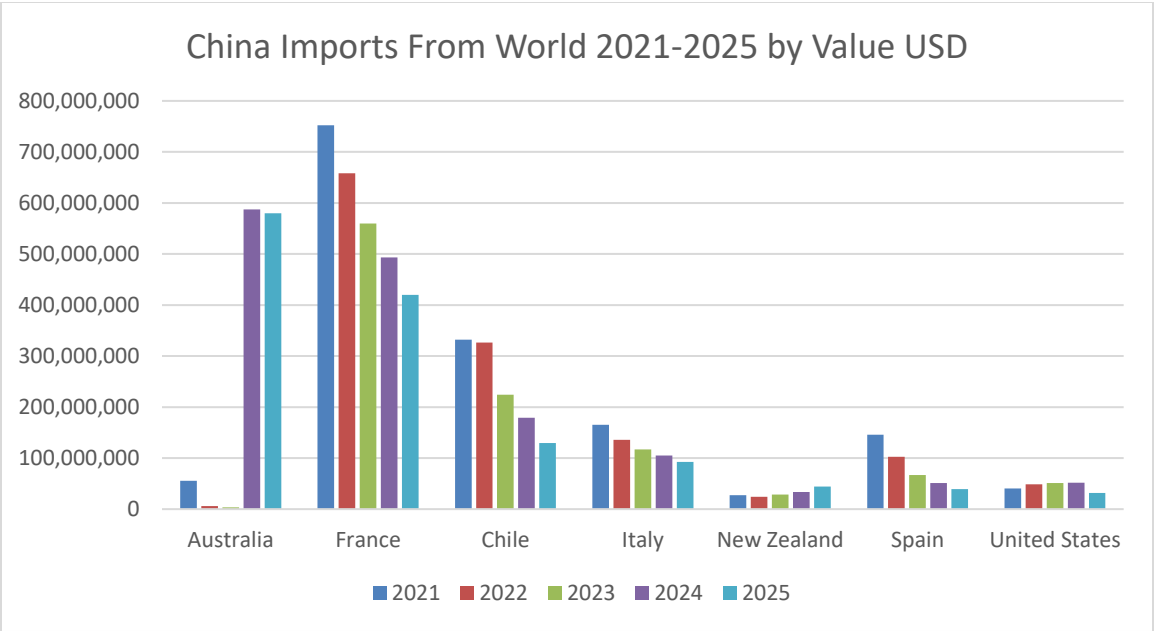
In 2025, China's total wine imports reached approximately \$1.4 billion, declining 11 percent year-on-year. Despite the overall drop in import volume, the average import price rose, suggesting a shift toward fewer but higher-value imports, consistent with broader premiumization trends in the Chinese wine market. Industry sees the strongest growth potential in sparkling wine and low-/no-alcohol wines through 2027, while imported still wines face tougher headwinds.

Market Trends and Consumer Preferences



China’s Sources of Imported Wine January to December 2025, top eight exporting countries, Source: Trade Data Monitor

Data from the General Administration of Customs China (GACC) shows China's total wine import value in 2025 was approximately \$1.4 billion, declining 11 percent year-on-year. Despite the overall drop in import volume, the average import price rose to approximately \$6.86 per liter, up 22 percent year-on-year, suggesting a market shift toward fewer but higher-value imports. China's wine import data for January–May 2026 points to a notable bright spot amid a broadly challenging market: sparkling wine (HS code 220410) posted year-on-year growth of 15.3 percent, outpacing the overall import trend.



China Imports from World Commodity: HS 2204, Wine Calendar Year: 2021 – 2025, Source: Trade Data Monitor

Overall, China’s wine market has stabilized at lower consumption levels. Although consumer consumption has been an important support point for the wine market in recent years, volume is limited and insufficient to offset the contraction in business/institutional consumption. Against the backdrop of slowing sales momentum and high inventory levels, distributors are less willing to stock up and importers have accordingly scaled back their purchasing volumes. The bright spot in consumption is in lighter white and sparkling wines, which may be a result of Chinese consumers moving away from formal banquet settings toward casual social occasions, where those wines are preferred. The categories’ growth also aligns with rising demand among younger and female consumers, who tend to favor lighter, more festive drinking experiences.

In the past, many independent, smaller companies imported wine into China. Over the last few years, bigger companies further down the supply chain (like large retailers or distributors) have started handling their own imports directly, cutting out these smaller importers and making it much harder for small, independent importers to compete. As a result, China's wine market looks very different today with fewer players than before. The structural change has pushed market players to reorganize, favoring big brands, better quality, and diverse ways of reaching customers, while squeezing out smaller independent importers.

Looking forward, industry sources project that non-premium import brands will continue facing growing pressure to adapt or compete with local brands. Relevance in China's wine market will increasingly be defined not by origin, but by fit with local tastes and everyday consumption occasions.

China’s Domestic Wine Market

China's domestic wine industry is also shifting away from focusing on government and business banquet settings toward casual occasions such as home drinking, social gatherings, and outdoor camping. New product development targets younger and female consumers, with a focus on low-alcohol, fruit-forward, and easy-drinking offerings.

Chinese wine brands are also starting to define their own identity, tapping into the terroir of domestic wine regions and showcasing the use of native grape varieties to build a distinctly Chinese flavor identity. They are also lowering the entry barrier through taste and label creativity to meet diverse consumer needs and differentiate from their competitors.

China’s Most Popular Grape Varieties:

Grape Variety	Description	Key Regions
Cabernet Sauvignon	The most widely planted and classic red variety in China	Eastern foothills of the Helan Mountains (Ningxia), Xinjiang, Hebei
Marselan	Currently one of the fastest-growing star varieties in China	Ningxia, Jiaodong Peninsula
Cabernet Gernischt	A signature red variety for China	Yantai production region, Shandong

Petit Manseng	Introduced to China from France, it can produce high-acid sweet white wines, and characterful, high-quality dry white wines	Shandong
Chardonnay	A signature white variety and displays crisp acidity in cooler regions while in warmer wine-growing areas, it is richly aromatic and full-bodied, often aged in oak barrels	Ningxia, Xinjiang, Hebei, Shandong

Prospects and Opportunities for American Wines: Leveraging Competitive Advantages in China

American wineries are strategically positioning themselves in the Chinese market by capitalizing on their label clarity advantage. The straightforward, easy-to-understand labeling of American wines provides a competitive edge in e-commerce and retail channels, where consumers make quick purchasing decisions. Current sales strategies concentrate on the 300 RMB (45 USD) price point, targeting casual afternoon drinking occasions as the primary consumption moment.

Innovation remains a key focus, as demonstrated by new product launches at the Chengdu Food and Drink Fair. U.S. wineries are introducing lower-calorie options with 9 percent ABV, testing market receptivity to health-conscious wine alternatives through these new SKUs.

As consumer awareness of sustainability grows, U.S. wineries are also well-positioned to turn this shift into a competitive advantage. Buyers and purchasing managers — particularly at large membership and supermarket chains — are increasingly marketing wines on their production methods that align with consumer values, such as sustainable, organic, or natural wines. U.S. wineries are well-positioned to turn this trend into a competitive advantage, especially in cities with higher disposable income.

Marketing and Promotion Efforts

Relevant 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.vinalty.com/en/events/vinality-around-the-world/wine-to-asia/ Reach out to ATO Guangzhou for details atoguangzhou@usda.gov
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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
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Additional references:

[Consumer Segments and Market Entry: Please refer to Wine Market Update 2025 \(GAIN CH2025-0190\)](#)

Attachments:

No Attachments.