CHINA'S FOOD AND BEVERAGE MARKET

Consumer trends and opportunities for German SMEs

With support from

Federal Ministry of Agriculture, Food and Regional Identity

by decision of the German Bundestag

中德农业中心
Deutsch-Chinesisches
AGRARZENTRUM

EXECUTIVE SUMMARY

China remains one of the world's largest food and beverage markets, but **opportunities for German companies are becoming more selective**. Consumer spending continues to grow, while slower overall market growth, stronger domestic competition, changing demographics, and increasing price consciousness are making broad-based expansion more difficult. At the same time, new sources of demand are emerging from lower-tier cities, an aging population, changing lifestyles, and growing interest in products that offer clear additional value.

Chinese consumers are increasingly discerning. **Value for money has become more important, but consumers remain willing to spend on products that offer tangible benefits,** including quality, convenience, health and nutrition, novelty, or distinctive experiences. Different consumer groups have different priorities, making clearly defined target consumers and use cases increasingly important. Digital and physical retail are closely interconnected, with e-commerce, content platforms, supermarkets, specialty retailers, convenience stores, and instant retail playing different roles in product discovery and purchasing.

German food and beverage products retain an established position in China, but **prospects differ substantially by category**. Bakery products remain a particular strength, increasingly driven by ingredients and other B2B applications. In dairy, opportunities are shifting toward whey, specialized products, ingredients, and higher-value applications. Beer and wine face more challenging market conditions, with opportunities increasingly concentrated in premium, niche, and differentiated segments. Overall, the strongest future potential is likely to come from **value-added specialization rather than broad volume growth**.

Emerging opportunities include health-oriented product upgrading, organic and natural products, and convenience-oriented solutions. Relevant areas range from reduced-sugar and high-protein products to personalized nutrition, organic foods, ready-to-eat and ready-to-cook products, snacks, bakery solutions, and B2B foodservice products. Germany's reputation for quality, reliability, and technical expertise remains an advantage, but companies need to translate "Made in Germany" into concrete benefits relevant to Chinese consumers.

Opportunities also extend beyond conventional food exports. **German strengths in processing, packaging, automation, preservation, and quality management can support a "technology + products" approach**. Combining these capabilities with products and ingredients can create longer-term B2B partnerships with Chinese food companies and provide an alternative to competing solely in increasingly crowded consumer markets.

For German SMEs, China therefore requires a **selective, gradual, and evidence-based market-entry strategy**. Regulatory requirements should be assessed early, products and positioning adapted to clearly defined target consumers, and entry channels matched to the product and company resources. SMEs should test demand, establish reliable local partnerships, and refine their approach before scaling. **China remains a market with significant opportunities, but success increasingly depends on choosing the right niche and offering a clear value proposition**.

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LIST OF ABBREVIATIONS

Abbreviation	Full term
BMLEH	German Federal Ministry of Agriculture, Food and Regional Identity (Bundesministerium für Landwirtschaft, Ernährung und Heimat)
CAAS	Chinese Academy of Agricultural Sciences
CBEC	Cross-Border E-Commerce
CCFA	China Chain Store & Franchise Association
EUR	Euro
FMCG	Fast-Moving Consumer Goods
GACC	General Administration of Customs of the People's Republic of China
GDP	Gross Domestic Product
NBS	National Bureau of Statistics
RMB	Renminbi
SAMR	State Administration for Market Regulation
SME	Small and Medium-sized Enterprise
YOY	Year-on-Year (compared with the same period in the previous year)

INTRODUCTION

China is one of Germany's most important trading partners and, with a population of more than 1.4 billion and a middle-income group exceeding 400 million people, a major global market for food and beverage products. While German products benefit from a strong reputation for quality and safety, capturing the opportunities in this large consumer market is becoming more challenging as consumer preferences change, domestic competition intensifies, and sales channels rapidly evolve.

This report provides German small and medium-sized enterprises (SMEs) with a business-oriented overview of China's food and beverage market. It examines consumer trends and profiles, purchasing behavior, sales channels, established and emerging product opportunities, and the positioning of German products. Based on these findings, the report identifies key opportunities and risks and provides recommendations for market entry and development.

Methodology: The report combines desk research with expert interviews. The analysis draws on official German and Chinese statistics as well as recent market and industry studies. Where relevant, German export data are compared with Chinese import statistics to corroborate market trends. Expert interviews complement the secondary research and provide practical industry perspectives. The findings provide general market guidance and should be complemented by product- and company-specific research before market entry. Further information on the methodology and its limitations is provided in the Appendix.

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1. MARKET OVERVIEW AND MACRO ENVIRONMENT

1.1 Key demographics and socioeconomic trends

China remains one of the world's largest consumer markets. In 2025, GDP reached RMB 140.2 trillion, growing by 5.0%, while total retail sales of consumer goods increased by 3.7% to RMB 50.1 trillion (NBS 2026b). Consumer spending therefore continued to expand, albeit at a moderate pace.

At the same time, demographic and geographic shifts are reshaping consumer demand. China's population remained at approximately 1.4 billion in 2025, with more than two-thirds of the population now living in urban areas, reflecting the country's high level of urbanization. The population is also aging. People aged 60 and above accounted for 23% of the population, increasing the importance of older consumers in what is known as China's silver economy (*see Glossary*). Retail sales in rural areas grew slightly faster than in urban areas in 2025, indicating that consumer growth is becoming more geographically dispersed.

Food remained a comparatively dynamic segment of consumer spending. Among larger retailers covered by NBS category-level statistics, sales of grain, oil, and food products increased by 9.3% in 2025, compared with 1.0% for beverages. Online retail sales of physical goods grew by 5.2%, further underlining the importance of e-commerce in China's consumer market.

Table 1: Key socioeconomic indicators, 2025

Indicator	Value (RMB trillion)	Rate / share	Business relevance
GDP	140.2	+5.0%	Large economy with continued growth
Total retail sales of consumer goods	50.1	+3.7%	Consumer spending continues to expand moderately
Retail sales of grain, oil, and food	—	+9.3%	Food outpaced overall retail growth
Retail sales of beverages	—	+1.0%	Beverage sales grew at a more moderate pace
Online retail sales of physical goods	13.1	+5.2%	E-commerce continues to gain importance
Urbanization rate	—	67.9%	More than two-thirds of the population lives in urban areas
Population aged 60 and above	—	23.0%	Older consumers are becoming a more important target group

Source: NBS (2026b)

1.2 Government priorities shaping consumer demand

Government policy plays an important role in shaping China's consumer market. Current priorities include boosting domestic consumption, strengthening food quality and safety, promoting healthier lifestyles, expanding digital commerce, and encouraging green consumption. These priorities are influencing consumer markets and creating opportunities for food and beverage products that align with health, quality, convenience, and environmental sustainability.

Table 2: Selected policy priorities shaping consumer demand

Policy priority	Key initiatives	Relevance for food and beverage companies
Boosting consumption	*Special Action Plan for Boosting Consumption (2025)*	Supports domestic consumption and the development of new forms of consumption
Food quality and safety	*Opinions on Further Strengthening Food Safety Supervision across the Entire Supply Chain (2025)*	Reinforces expectations for food safety, traceability, and supply chain compliance
Digital commerce	*Three-Year Action Plan for Digital Commerce (2024–2026)*	Supports the continued development of e-commerce and digital sales channels
Health and nutrition	*Healthy China 2030; Special Action Plan for Promoting Healthy Consumption (2025); Weight Management Year Campaign (2024)*	Supports demand for healthier, nutritionally balanced, and functional products
Green consumption	*Green Consumption Promotion Action (2026)*	Encourages sustainable products, packaging, and consumption practices

Source: Compiled by the author based on relevant Chinese government policies.

1.3 Policy and regulatory environment relevant to food imports

China encourages imports of high-quality consumer goods, including through preferential policies for cross-border e-commerce (CBEC) (*see Glossary*) and special customs supervision zones. At the same time, food and beverage imports are subject to extensive regulatory requirements that vary by product category and import channel.

For German SMEs, the main areas requiring attention include market access and customs requirements, registration of overseas manufacturers, food safety and ingredients, labeling, and CBEC eligibility. Regulatory requirements should therefore be assessed at an early stage of market-entry planning, particularly as they can affect product formulation, packaging, costs, and the choice of distribution channel. A more detailed overview of relevant laws, regulations, and standards is provided in the Appendix (Table A1).

Table 3: Key regulatory areas for food and beverage imports

Regulatory area	What German SMEs need to know	Key authority / framework
Market access and customs	Products must meet applicable import, inspection, quarantine, and food safety requirements. Additional requirements may apply to products of animal or plant origin.	GACC; Food Safety Law; import and export food safety regulations
Overseas manufacturer registration	Overseas manufacturers of food exported to China are subject to registration requirements. New rules under GACC Decree No. 280 take effect on 1 June 2026.	GACC
Food safety and ingredients	Imported foods must comply with Chinese food safety standards, including requirements governing food additives.	SAMR; national food safety standards
Labeling and nutrition information	Prepackaged foods must comply with Chinese labeling and nutrition-labeling requirements. Revised standards take effect on 16 March 2027.	SAMR; GB 7718-2025; GB 28050-2025
Cross-border e-commerce	CBEC offers preferential tax treatment for eligible products, but companies need to check product eligibility and applicable restrictions.	CBEC Positive List; relevant customs and tax regulations

Source: Compiled by the author based on relevant Chinese laws, regulations, and standards.

Companies should also monitor EU-China trade relations and tariff developments. Trade remedy measures can quickly alter the commercial outlook for individual product categories. For example, following an anti-subsidy investigation into EU dairy products, China introduced countervailing duties of 7.4% to 11.7% on selected products from 13 February 2026. Such measures can directly affect import costs, pricing, and the competitiveness of German and EU suppliers.

For the latest regulatory requirements, companies should consult the official databases of the State Administration for Market Regulation (SAMR) and the General Administration of Customs (GACC).

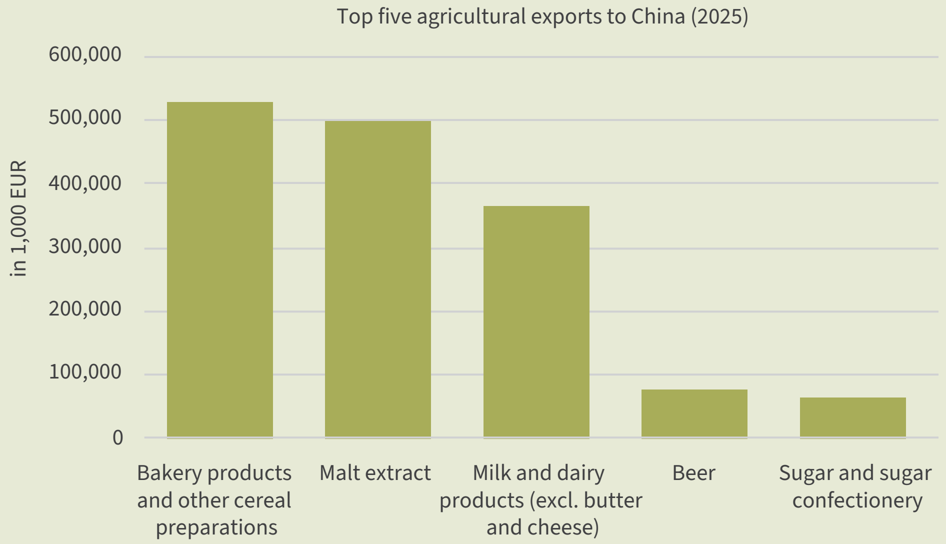
1.4 China's trade with the EU and Germany

China remains a major global trading economy and import market. In 2025, total trade in goods reached RMB 45.47 trillion, an increase of 3.8% over the previous year. Exports grew by 6.1% to RMB 26.99 trillion, while imports increased by only 0.5% to RMB 18.48 trillion, highlighting a significant gap between export and import growth. Cross-border e-commerce has expanded particularly rapidly, with imports and exports reaching RMB 2.75 trillion in 2025, up 69.7% compared with 2020 (GACC, 2025).

The EU is China's largest source of imported consumer goods, accounting for 26.8% of China's consumer goods imports in 2025. Total China-EU trade reached RMB 5.93 trillion in the same year (GACC, 2025). Within the EU, Germany remains China's largest trading partner, with bilateral trade in goods totaling EUR 251.8 billion in 2025 (Federal Statistical Office, 2026).

German food and agricultural products already have an established presence in China, although performance varies substantially by category. In 2025, bakery products and other grain-based preparations were Germany's largest agricultural export category to China by value, reaching EUR 530 million, followed by malt extract at EUR 500 million. Milk and dairy products excluding butter and cheese reached EUR 364 million (BMLEH, 2026). Chapter 3 examines these and other product categories in greater detail to identify where German suppliers face growing, stable, or declining market opportunities.

Figure 1: German agricultural exports to China, 2025



Source: BMLEH (2026)

KEY TAKEAWAYS

- **Large but slower-growing consumer market**: China remains a major consumer market, but moderate retail and import growth means opportunities need to be assessed selectively rather than assuming broad-based market expansion.
- **Changing sources of demand**: High urbanization and population aging are reshaping consumer demand, while lower-tier cities and rural markets are becoming increasingly relevant for future growth.
- **Policy creates opportunities**: Government priorities around health, food quality and safety, digital commerce, and green consumption support corresponding product and sales opportunities.
- **Regulatory complexity is increasing**: Food safety, labeling, manufacturer registration, customs requirements, and CBEC eligibility create significant compliance demands and continue to evolve, requiring early regulatory planning.
- **Trade conditions can change quickly**: Germany has an established food and agricultural trade presence in China, but tariffs, trade remedies, and other market-access measures can materially affect the competitiveness of individual product categories.

2. CONSUMER SEGMENTS, PURCHASING BEHAVIOR, AND SALES CHANNELS

China's consumer market is highly diverse, with purchasing behavior varying across regions, age groups, income levels, digital habits, and attitudes toward health and sustainability. Understanding these differences is essential for German SMEs when selecting target groups, positioning products, choosing sales channels, and developing marketing strategies.

This chapter examines key consumer segments and purchasing behavior in China, including the channels consumers use, the factors influencing purchasing decisions, and major consumption trends shaping the food and beverage market.

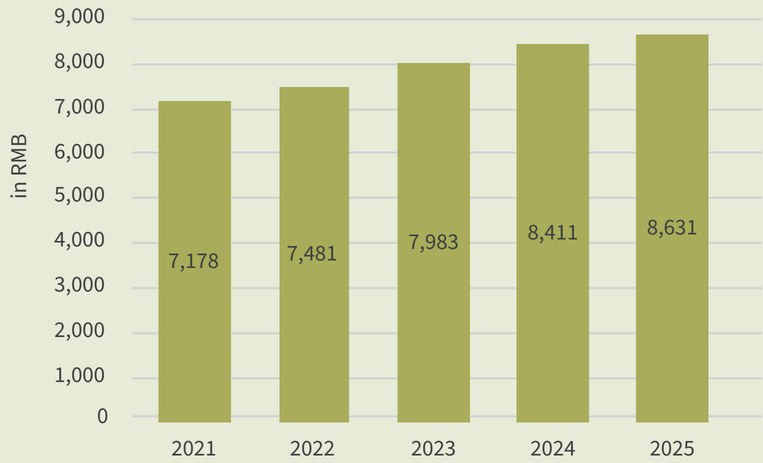
2.1 Key consumer trends shaping China's food and beverage market

Trend 1: Food spending continues to grow, but consumers remain cautious

Per capita expenditure on food, tobacco, and liquor increased from RMB 7,178 in 2021 to RMB 8,631 in 2025 and accounted for nearly 30% of total household expenditure (NBS, 2026b). This indicates continued growth in consumer spending on food and beverage products.

At the same time, spending remains cautious. While Chinese consumers are generally optimistic about the economic outlook and their personal finances, they continue to take a more selective, wait-and-see approach to consumption (McKinsey & Company, 2025; NIQ, 2025a).

Figure 2: Per capita expenditure on food, tobacco, and liquor, 2021–2025



Source: NBS (2026b)

Trend 2: Lower-tier cities are becoming important growth markets

Consumption growth in third- and fourth-tier cities (*see Glossary*) is increasingly outpacing that in first- and second-tier cities, marking a shift from 2020–2023, when second-tier cities were the main drivers of market growth. Population aging, movement of residents from higher-tier to lower-tier cities, lower living costs, and expanding access to modern retail and e-commerce are supporting this development, making lower-tier cities increasingly important growth markets for food and beverage companies (Lannes et al., 2025).

At the same time, growth in the fast-moving consumer goods (FMCG) market (*see Glossary*) continues to be driven primarily by sales volume rather than higher prices. This indicates that growth in lower-tier markets should not automatically be equated with opportunities for premium products; price sensitivity and value for money remain important considerations (Lannes et al., 2025).

Trend 3: Consumers are more price-conscious but still spend on added value

Chinese consumers are becoming more prudent in their purchasing decisions, contributing to the growth of discount formats such as Hippofresh NB (*see Glossary*) (Accenture China, 2025b; NIQ, 2025b; PwC China, 2025). At the same time, consumers remain willing to spend selectively on products that support personal development, relaxation, or emotional well-being. Among surveyed respondents, 47% said they had purchased only practical items to avoid waste, while 68% were willing to spend more on goods and services that help them relax or relieve stress (NIQ, 2025b).

This greater focus on value is also weakening traditional brand loyalty. Among surveyed consumers, 55% frequently compare alternatives even when they have a preferred brand, up 13 percentage points from 2021 (Accenture China, 2025b). The FMCG market is also seeing a shift toward "affordable alternatives," with average selling prices recording their sharpest decline in four years (Lannes et al., 2025).

For food and beverage companies, price consciousness does not necessarily mean competing on price alone. Consumers remain open to higher-quality and innovative products when these offer clear added value, including convenience, health benefits, novel experiences, or emotional appeal.

Trend 4: Health and well-being are becoming key purchase drivers

Health and well-being are becoming increasingly important purchasing considerations alongside value for money, product quality, and safety. Nearly 90% of surveyed consumers actively focus on their physical and mental well-being, while perceptions of health are becoming broader and more diverse (Accenture China, 2025b). Government initiatives such as Healthy China 2030 reinforce this trend.

Figure 3: Growth rates and key consumer trends across selected consumer goods categories in China, 2025

Beverages
+2.7%
- More diversified consumption scenarios;
- Sugar-free tea and functional beverages drive category growth

Alcoholic beverages
+4.5%
- Innovation in premium and personalized products stimulates consumption upgrading;
- Beer and wine show relatively fast growth

Snacks
-7.6%
- Rising health awareness leads to shrinking demand;
- Niche concept products such as black truffle biscuits and probiotic gummies grow against the trend

Staple foods, condiments and seasonings
-1.5%
- Low-oil and low-salt dietary trends narrow demand;
- Sub-segments such as single-serve meals and self-heating foods grow relatively fast

Personal care
+12.9%
- Rising self-care and health-care awareness;
- Personalized and functional beauty categories drive growth

Home care
+2.9%
- Technology upgrades in household cleaning and laundry products stimulate growth

Dairy products
-8.5%
- Overall market demand insufficient;
- High-calcium and zero-additive concept products gain market share.

Maternal and baby products
+0.3%
- A rebound in the birth rate supports category recovery;
- Market demand becomes more diversified

Source: Adapted from NIQ (2025a)

These changing priorities are also reshaping demand within individual food and beverage categories. While snacks, dairy products, staple foods, and condiments declined overall, health-oriented and functional subcategories continued to grow. Examples include probiotic gummies, dairy products marketed as high in calcium or protein or free from additives, and convenient products such as single-serving and self-heating meals (NIQ, 2025a).

Low-alcohol beverages provide another example of this shift: growth in the alcoholic beverage sector was driven primarily by low-alcohol products rather than traditional spirits such as baijiu (NIQ, 2025a).

2.2 Key consumer profiles

Based on consumer surveys and market research, this report identifies four consumer profiles relevant to German food and beverage SMEs. Rather than segmenting consumers primarily by age, the profiles focus on purchasing preferences and motivations, complemented by factors such as age, life stage, household structure, city tier, and digital behavior.

The profiles are intended to help German SMEs understand what different consumers value, how they shop, and which products may appeal to them. Product quality and food safety are treated as baseline expectations across all profiles.

The profiles are illustrative rather than mutually exclusive: consumers may fit more than one profile, and their purchasing behavior may vary by product category and consumption occasion. Consumer preferences also evolve in response to changing socioeconomic conditions. Companies should therefore continuously monitor consumer needs and adapt their products and marketing strategies accordingly.

2.2.1 Value-for-money-driven consumers

Keywords #price sensitivity #price comparison #response to promotions/discounts #stockpiling

Key characteristics: These consumers prioritize value for money, balancing price with tangible benefits such as quality, quantity, and functionality. They respond strongly to straightforward discounts and promotions and frequently compare prices across stores and platforms. However, price sensitivity does not mean accepting lower quality; only 17% of surveyed consumers said they would choose cheaper products to save money (NIQ, 2025b). Foreign origin or abstract premium positioning alone is unlikely to justify a higher price (PwC China, 2025).

Typical shopping behavior: Value-for-money-driven consumers frequently purchase or restock everyday groceries and packaged foods, including milk, snacks, cooking oil, rice, flour, dried goods, and frozen products. They make active use of coupons and special offers and increasingly shop at discount stores. Online, they may stock up during major promotional periods such as Spring Festival and the “11.11” and “6.18” shopping festivals (*see Glossary*).

Typical consumers: This behavior is particularly common among pragmatic household shoppers, budget-conscious students and young professionals, and frequent purchasers of daily essentials in lower-tier cities.

Implications for German SMEs: Imported products can appeal to these consumers, but “Made in Germany” alone is unlikely to justify a substantial price premium. Products need to demonstrate clear value through quality, taste, functionality, pack size, or promotions while remaining competitive for everyday consumption.

2.2.2 Convenience-oriented consumers

Keywords #time-saving #instant availability #proximity #efficient delivery #portability #instant fulfillment #low decision-making effort #small portions

Key characteristics: These consumers prioritize products and purchasing channels that save time, reduce effort, and fit easily into daily routines. Their demand for speed and convenience is supporting the growth of convenience stores, instant retail, and front-end warehouse models (*see Glossary*), which combine proximity, broad product availability, and rapid delivery (CCFA/KPMG, 2025; PwC China, 2025).

Typical shopping behavior: Purchases tend to be frequent, fragmented, and driven by immediate needs, including breakfast, commuting, office snacks, post-workout consumption, late-night meals, and impulse purchases. Growing demand for instant gratification is also increasing reliance on 24/7 instant retail services (NIQ et al., 2025). Products and combinations designed for specific consumption occasions—such as breakfast sets or convenient post-workout meals—can therefore be particularly relevant.

Typical consumers: This behavior is particularly common among consumers with fast-paced work and family lives, including busy single professionals, working couples, heavy digital users, and travelers.

Implications for German SMEs: Relevant products include small and portable formats, ready-to-eat, ready-to-heat, ready-to-cook (3R) (*see Glossary*), and ready-to-drink products. Beyond the product itself, convenient availability is important. Products need to be accessible through channels that support fast and low-effort purchasing.

2.2.3 Health- and ingredient-conscious consumers

Keywords #low-sugar #high-protein #functional nutrition #clean ingredients #weight management #post-workout recovery #gut health #environmental health #sustainability #organic #natural

Key characteristics: These consumers seek clear and perceivable health benefits aligned with their individual health goals and lifestyles. Relevant attributes include low-sugar or sugar-free formulations, high protein content, functional nutrition, gut health, weight management, and post-workout recovery. They also pay close attention to ingredients and increasingly use product labels, reviews, social media, and digital tools to evaluate and compare products (NIQ & Rednote, 2025).

For this group, health increasingly extends to organic, natural, environmentally friendly, and sustainable products and packaging. Consumers show willingness to pay more for food products that support environmental health (PwC China, 2025), but they are also skeptical of claims they cannot verify. Nearly 50% of surveyed consumers cited concerns about the reliability of environmental claims as a reason for not purchasing products marketed with sustainability-related attributes (Syntao, 2026).

Typical shopping behavior: Health-oriented consumption is increasingly integrated into everyday routines, including nutritious breakfasts, pre- and post-workout nutrition, office snacks and light meals, weight management, and nutritional support for family members. These consumers actively engage with product information and labels to assess whether products meet their health and lifestyle needs.

Typical consumers: This behavior is particularly common among fitness- and weight-conscious consumers, health-conscious urban professionals, older consumers seeking nutritional support, and consumers interested in organic products and environmental sustainability.

Implications for German SMEs: This group offers opportunities for imported dairy products, functional and nutritional snacks, light meal options, organic foods, natural and clean-label products, and products designed for specific health or lifestyle needs. Clear ingredients, credible health benefits, and transparent and verifiable claims are particularly important for building trust.

2.2.4 Experience- and lifestyle-oriented consumers

Keywords #trying new things #product discovery #exploring flavors #brand identity #social sharing #limited editions/collaborations #self-indulgent spending #content-driven consumption #sense of ceremony

Key characteristics: These consumers are motivated by the experience, emotional satisfaction, aesthetic appeal, and social visibility associated with products. They are particularly attracted to new flavors, distinctive packaging, limited editions and collaborations, and compelling brand stories. Food and beverages can also serve emotional needs, with emotional appeal becoming an increasingly important factor in attracting consumer attention and influencing purchasing decisions (NIQ & Rednote, 2025).

Typical shopping behavior: Product discovery frequently takes place through content and social media platforms, where consumers seek recommendations and share their experiences. Purchases are often associated with social gatherings, afternoon tea, weekend outings, festive occasions, home indulgence, or simply trying something new. Packaging, brand identity, novelty, and whether a product is worth sharing can strongly influence purchasing decisions.

Typical consumers: This behavior is particularly common among young, trend-conscious urban consumers; digitally savvy and socially oriented consumers; consumers seeking self-indulgence and aesthetic experiences; and consumers with niche tastes and an interest in cultural narratives.

Implications for German SMEs: Imported food and beverages can appeal to these consumers through novelty, distinctive flavors, attractive packaging, and differentiated brand stories. Relevant categories include snacks, baked goods, specialty drinks, gift-oriented products, and seasonal or limited-edition products. For this group, foreign origin can be an asset when it contributes to a distinctive product experience or lifestyle positioning.

2.3 Purchasing channels

China's food and beverage retail landscape combines traditional offline retail with rapidly evolving online and hybrid sales channels. Consumers increasingly move across multiple touchpoints to discover, compare, purchase, and repurchase products, making channel selection an important consideration for German SMEs.

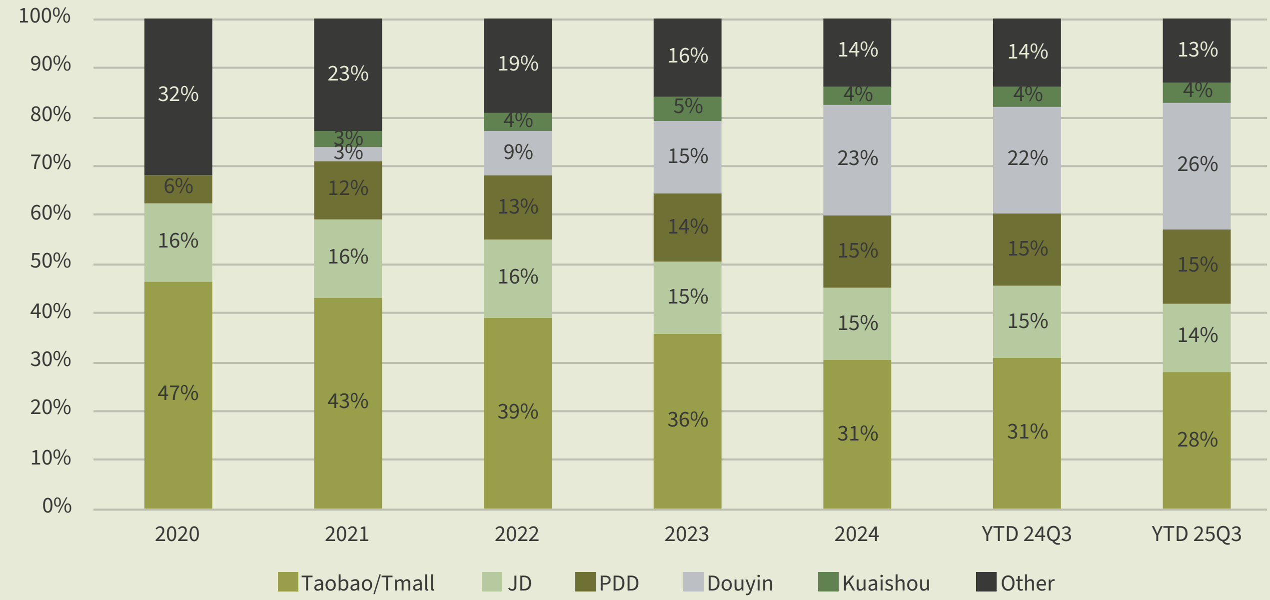
This section provides a practical overview of the main purchasing channels relevant to food and beverage products, including supermarkets and other offline formats, e-commerce, cross-border e-commerce, content-driven commerce, and instant retail. It explains how these channels operate, highlights major market players, and assesses their relevance for German SMEs.

2.3.1 Online channels

Online channels are increasingly important for food and beverage sales in China. While total retail sales of consumer goods grew by 3.7% in 2025, online retail sales increased by 8.1%, and online sales of food products grew by 16.0% (NBS, 2026a, 2026b).

China's online retail landscape encompasses several distinct but increasingly interconnected models. Conventional e-commerce platforms such as Taobao/Tmall and JD (*see Glossary*) remain major sales channels, while platforms such as Douyin and Kuaishou (*see Glossary*) combine content, product discovery, and purchasing. Taobao/Tmall remains the largest online channel for urban fast-moving consumer goods (FMCG), but its market share has gradually declined as platforms such as Douyin and Pinduoduo (PDD) (*see Glossary*) have gained importance (Figure 4).

Figure 4: Market share of major e-commerce platforms in China's urban FMCG market by sales value, 2020–September 2025



Source: Kantar World Panel, Bain Analysis (2025)

Livestreaming e-commerce (*see Glossary*) has become an important part of this content-driven model. Transaction volume increased more than twelvefold between 2019 and 2024, reaching RMB 4.5 trillion, and was projected to exceed RMB 5 trillion in 2025 (DRC-SAMR & NAES, CASS, 2026).

For foreign food and beverage companies, cross-border e-commerce (CBEC) (*see Glossary*) is particularly relevant because it provides a dedicated route for selling eligible imported products directly to Chinese consumers. Tmall Global is a leading platform in this segment; its cross-border food sales have grown steadily for three consecutive years, and the platform accounts for more than 60% of online cross-border food sales according to the platform's own market analysis (Tmall & Growth Insights, 2025).

2.3.2 Offline channels

Offline retail remains an important purchasing channel for food and beverages in China, particularly for fresh products and categories where product sampling, impulse purchases, established shopping routines, consumer trust, or in-store advice influence purchasing decisions.

China's supermarket sector is undergoing significant restructuring. The country's top 100 supermarket chains generated RMB 900 billion in sales in 2024, broadly unchanged from the previous year, while their combined number of stores declined by 9.8% to 25,200. Market concentration remained high, with the top 10 supermarket companies accounting for 66.6% of total sales among the top 100. Traditional hypermarkets and conventional supermarkets continued to face pressure, while membership stores, discount retailers, and other differentiated formats expanded. Retailers such as Aldi China, Freshippo NB, and Hotmaxx recorded strong growth in their discount formats (CCFA, 2025).

Fresh food has become an important part of this transformation. Fresh food supermarkets accounted for 11.8% of standard and small supermarkets nationwide in 2023, an increase of 32%, and retailers are increasingly using strong fresh food offerings to attract consumers to physical stores (NIQ, 2025b; NIQ & CCFA, 2026). Regional retailers are also gaining attention through differentiated concepts. Pang Dong Lai (*see Glossary*), for example, combines strong fresh and prepared food offerings with private-label products and a distinctive in-store experience (NIQ & CCFA, 2026; USDA ATO Beijing, 2025).

The distinction between different retail formats is important for understanding China's changing offline market. Table 4 provides an overview of the main formats and examples of major retailers operating in each segment.

Table 4: Major supermarket and retail chains in China

Parent company / group	Retail chain(s) operated	Retail format	Number of outlets in 2024
Walmart China	Walmart (沃尔玛)	Supermarket	334
	Sam's Club (山姆会员店)	Warehouse membership store	
RT-Mart	RT-Mart (大润发)	Supermarket	505
	M Membership Store (M 会员店)	Membership store	
	RT-Mart Super (大润发 Super)	Community supermarket	
Alibaba	Freshippo / Freshippo Fresh (盒马)	Fresh food supermarket	420
	Freshippo X (盒马 X)	Membership store	
	Freshippo NB (盒马 NB)	Discount store	
Yonghui	Yonghui (永辉)	Supermarket	775
Wu-Mart Group	Wu-Mart (物美)	Supermarket	918
	METRO (麦德龙)	Supermarket / membership store	
Bailian Group	Shiji Lianhua (世纪联华)	Supermarket	3,152
	Lianhua (联华)	Supermarket	
	Hualian (华联)	Supermarket	
CR Vanguard	CR Vanguard (华润万家)	Supermarket	2,200
	Ole (Olé)	High-end supermarket	
	Suguo (苏果)	Community supermarket	
Jiajiayue	Jiajiayue (家家悦)	Supermarket	902
	SPAR (世伴)	Supermarket	
Zhongbai Group	Zhongbai Wholesale (中百仓储)	Supermarket	714
	Zhongbai Supermarket (中百超市)	Community supermarket	
Qiandama	Qiandama (钱大妈)	Fresh food supermarket	2,959

Source: Compiled based on CCFA (2025)

Convenience stores form another important part of China's offline retail landscape, particularly for frequent, small-volume, and immediate purchases. The market includes large domestic networks such as Meiyijia as well as international operators such as Lawson and 7-Eleven. The scale of these networks is considerable: Meiyijia alone operated more than 40,000 outlets in 2025 (Table 5).

Photo: メイド理世 / Wikimedia Commons, CC BY-SA 4.0

Table 5: Major convenience store chains in China, 2025

Convenience store chain	Number of outlets in 2025
Meiyijia (美宜佳)	40,147
Sinopec Easy Joy (易捷)	28,689
PetroChina uSmile (昆仑好客)	19,814
Tianfu (天福)	7,718
Lawson (罗森)	7,068
Zuolinyoushe (左邻右舍) / Shenghuoyizhan (生活驿站)	6,238
Furong Xingsheng (芙蓉兴盛)	5,940
7-Eleven	5,565
Shizu (十足) / Zhishang (之上)	4,217
Jianfu (见福)	3,680

Source: CCFA (2025)

2.3.3 Hybrid channels

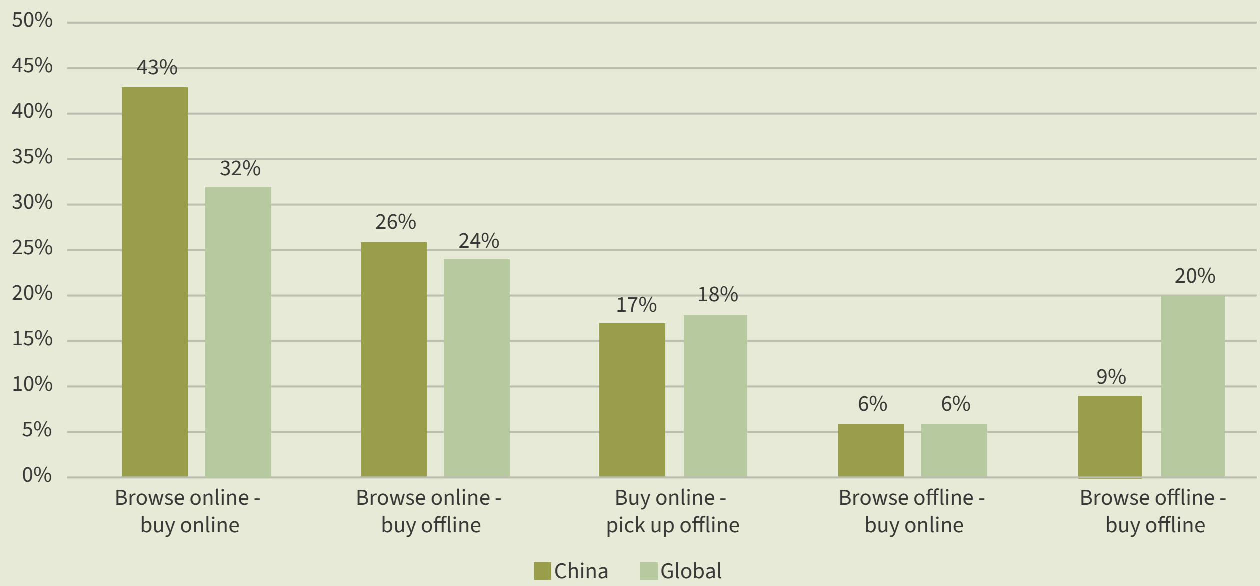
Hybrid channels connect online purchasing with physical stores and local fulfillment. Consumers may, for example, discover or experience a product in a store and later reorder it through a retailer or brand app or WeChat Mini Program. Brands can also maintain direct relationships with customers through their own digital channels, including WeChat groups and other private-domain channels.

Instant retail (*see Glossary*) is a particularly important hybrid model for food and beverages. It connects online ordering with nearby supermarkets, convenience stores, and front-end warehouses—small local fulfillment centers located close to consumers—as well as local delivery networks, allowing consumers to receive products rapidly, often within 60 minutes. This makes the model particularly relevant for products where convenience, freshness, and immediate availability matter, including fresh food, beverages, ready-to-eat meals, and daily necessities. Instant retail is already widely used in China and continues to expand rapidly.

2.3.4 Implications for German SMEs

Chinese consumers frequently combine online and offline channels throughout the purchasing journey. While 85% browse products online and 43% both browse and purchase online, 48% combine online and offline channels. Only 9% both browse and purchase exclusively offline (Accenture China, 2025b). This highlights the high degree of integration between digital and physical retail in China.

Figure 5: Shopping channel preferences of Chinese and global consumers



Source: Accenture China (2025b)

For German food and beverage SMEs, these purchasing patterns point to the importance of a multi-channel approach. Different channels can serve different functions, from product discovery and initial market testing to physical product experience, rapid fulfillment, and repeat purchases. Table 6 summarizes the main purchasing channels and their potential roles for foreign food and beverage companies.

Table 6: Main purchasing channels

Purchasing channel	Type	Main platforms / retailers	Main role for SMEs
Marketplace e-commerce	Online	Tmall, Taobao, JD, Pinduoduo	Search-based purchasing, product comparison, reviews, and standard product sales
Cross-border e-commerce (CBEC)	Online	Tmall Global, JD Worldwide, Douyin Global, Kaola	Access to imported products and potential market testing
Content and livestream commerce	Online	Douyin, Kuaishou, RED (Xiaohongshu), Taobao Live	Product discovery, education, storytelling, and new product promotion
Supermarkets and hypermarkets	Offline	Walmart, RT-Mart, Yonghui, CR Vanguard, regional supermarkets	Regular household shopping and physical product exposure
Warehouse membership stores	Offline	Sam's Club, Costco, METRO, Freshippo X	Premium and imported products, larger pack sizes, and family consumption
Convenience stores	Offline	Meiyijia, 7-Eleven, FamilyMart, Lawson	Beverages, snacks, ready-to-eat products, and small pack sizes
Specialty food and health stores	Offline	Snack chains, nutrition stores, mother-and-baby stores, pharmacies	Specialized food, health, and nutrition categories
Instant retail	Hybrid	Meituan Instashopping, JD Daojia, Ele.me, Freshippo, Dingdong	Rapid local fulfillment of beverages, snacks, dairy products, fresh food, and other immediate needs
Brand-owned / private-domain channels	Hybrid	WeChat Mini Programs, brand communities, WeChat groups	Direct consumer relationships, repeat purchases, loyalty, and customer engagement

Source: Compiled by the author.

2.4 Key factors influencing purchasing decisions

Chinese consumers evaluate food and beverage products across multiple touchpoints, from e-commerce product pages and supermarket shelves to social media posts and livestreaming sessions. Across these channels, four factors are particularly important in turning product discovery into purchase.

Trust comes first

Product safety, quality, and transparent information are baseline expectations. For unfamiliar foreign brands, easily accessible information on ingredients and nutrition, origin, production dates and shelf life, certifications, and product authenticity can help establish the trust required for purchase.

Safety may not always rank among the top purchase drivers in consumer surveys because consumers generally expect products to meet applicable standards. However, without this basic level of trust, other forms of positioning, such as lifestyle or emotional branding, are unlikely to be effective.

Novelty encourages trial, but consumers still need a clear reason to choose a product

Chinese consumers are highly open to new products, flavors, and formats. According to NIQ & Rednote (2025), 87% of surveyed consumers purchase new food and beverage products at least twice per month, with consumers aged 18–25 showing an even stronger interest in trying new products.

Novelty alone, however, is not enough. Consumers evaluate products based on a combination of factors, including taste, quality, value for money, brand reputation, product benefits, innovation, and reviews (PwC China, 2025; Accenture China, 2025b; NIQ & Rednote, 2025). Products therefore need to offer a clear reason to buy beyond simply being new or foreign.

Products need to “understand me”

Consumers increasingly expect products to reflect their individual preferences, lifestyles, and consumption occasions. This creates demand for more personalized products and solutions rather than one-size-fits-all offerings. Products that address a specific need, situation, or consumer group can create a stronger sense of personal relevance (Mininglamp Technology, 2026; NIQ & Rednote, 2025).

Growing use of generative AI further illustrates the demand for individualized solutions. Among surveyed Chinese consumers, 57% use AI tools for advice when looking for new solutions or ways to improve their lives (Accenture China, 2025b).

Digital content is changing how consumers discover products

Digital content, reviews, recommendations, and social interaction increasingly shape product discovery and evaluation. Livestreaming, short videos, RED posts (*see Glossary*), user reviews, and other forms of content allow brands to reach consumers before they actively search for a particular product. This is shifting consumption from a model in which consumers primarily search for products toward one in which products and brands proactively reach consumers through digital content (DRC-SAMR & NAES, CASS, 2026).

Greater exposure, however, does not necessarily translate into greater influence. Consumers are becoming more selective: 76% have abandoned a purchase because they faced too many choices or found the decision-making process too complex, while 68% reported finding marketing information “somewhat annoying” (Accenture China, 2025a, 2025b). Clear, credible, and relevant communication is therefore more important than simply maximizing exposure.

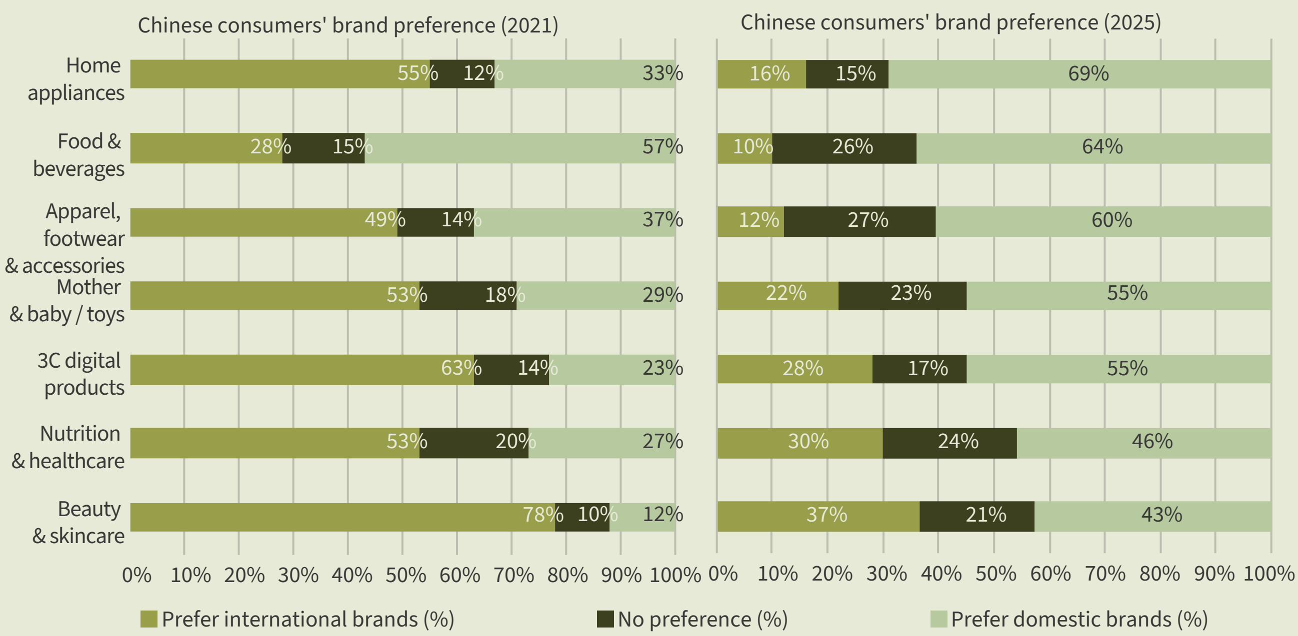
2.5 Cultural consumption trends

Several cultural trends are influencing how food and beverage products are positioned, marketed, and experienced in China. Three are particularly relevant: Guochao, brand collaborations, and mystery boxes.

Guochao (China Chic) has evolved from a preference for domestic products toward broader confidence in Chinese brands and their quality, aesthetics, and cultural relevance (PwC China, 2025). Cultural identity plays a comparatively important role in food choices: 29% of surveyed Chinese consumers say their cultural background influences what they eat, compared with 19% globally (PwC China, 2025). At the same time, Chinese brands have expanded into mid- and high-end segments, increasing competition for international brands (Accenture China, 2025b).

Guochao does not imply a rejection of foreign products. Chinese consumers remain interested in international products that offer distinctive quality, innovation, heritage, or experiences; 26% of surveyed consumers frequently explore and incorporate foods from other cultures (PwC China, 2025). For international brands, the challenge is therefore less about competing with Chinese identity than about establishing a distinctive and relevant position alongside increasingly sophisticated domestic brands.

Figure 6: Chinese consumers' evolving preferences for domestic and international brands



Source: Accenture China (2025b, 2021)

Photo: Beijing Daily

Example: Beijing Daoxiangcun — traditional pastries meet modern cultural branding

Beijing Daoxiangcun, a well-known traditional Chinese pastry brand, combines classic Chinese pastries and flavors with modern product design and seasonal offerings. Its products and packaging frequently draw on traditional festivals and other elements of Chinese cultural heritage. The example illustrates how established domestic food brands can combine tradition, cultural identity, and modern presentation to appeal to contemporary consumers.

Brand collaborations have become a widely used way to create novelty and connect products with cultural interests, entertainment, and consumer communities. In the first quarter of 2025 alone, 115 IP collaborations involving 58 food and beverage brands and 92 IPs were recorded (CBN Data, 2025). Collaborations can involve limited-edition products and packaging and are particularly suited to consumers interested in novelty, identity, and social sharing.

For German companies, collaborations can provide a way to increase awareness and connect with specific Chinese consumer groups. Rather than simply transferring European campaigns to China, brands can combine their own distinctive attributes with locally relevant cultural themes, IPs, and consumer interests.

Photo: Sina Finance

Example: Pepsi Zero × Black Myth: Wukong — connecting a global brand with Chinese cultural IP

Pepsi Zero collaborated with the Chinese video game *Black Myth: Wukong* on five limited-edition packaging designs featuring characters from the game. The campaign illustrates how an international brand can use locally relevant IP to create novelty, collectability, and opportunities for social sharing.

Mystery boxes (also known as blind boxes or surprise boxes) apply randomized rewards, hidden designs, limited editions, or similar mechanisms to products such as drinks, snacks, fast food, and ice cream. Borrowing from China's wider collectible and trendy-toy culture, they add surprise, collectability, and social sharing to otherwise conventional purchases. For food and beverage brands, the format illustrates how product experience and engagement can become part of the value proposition alongside the product itself.

KEY TAKEAWAYS

- **Consumers are increasingly selective**: Price consciousness is rising, but consumers remain willing to spend on products that offer clear added value through quality, health benefits, convenience, novelty, or emotional appeal.
- **Different consumers require different value propositions**: Purchasing motivations vary considerably. Successful positioning requires a clear understanding of the target consumer and their priorities rather than relying on broad demographic categories or a one-size-fits-all approach.
- **Online and offline channels need to work together**: Chinese consumers frequently move between digital and physical touchpoints. E-commerce and content-driven platforms are important for discovery and purchasing, while physical retail remains relevant for product experience, trust, and immediate needs. Hybrid models such as instant retail further blur the distinction between the two.
- **Trust, relevance, and clear product benefits drive purchasing decisions**: Foreign origin alone is not enough. Consumers expect reliable product information and increasingly seek products tailored to specific preferences, lifestyles, and consumption occasions. Novelty can encourage trial, but consumers still need a clear reason to choose a product.
- **Local culture increasingly shapes competition and marketing**: Stronger domestic brands, Guochao, collaborations, and experience-driven marketing are changing how products compete for attention. International brands can participate in these trends, but need to combine their distinctive strengths with an understanding of Chinese cultural references and consumer interests.

3. TRENDS IN CHINA'S IMPORTED FOOD AND BEVERAGE MARKETS

German and European food and beverage products have established a presence in several segments of the Chinese market, supported by perceptions of quality, food safety, and country of origin. However, market conditions vary considerably across product categories, and growing competition is changing the opportunities available to foreign suppliers.

This chapter examines established product categories with a strong German market presence, emerging opportunities for value-added products, and the role of "Made in Germany" in product positioning.

3.1 Established product categories with strong German market presence

This section examines bakery products, dairy products, beer, and wine, comparing German export trends with Chinese import demand. German export data from the Federal Ministry of Agriculture, Food and Regional Identity (BMLEH) and Chinese import data from the General Administration of Customs (GACC) are used to identify market trends and relevant developments within individual product categories. As the two statistical systems classify products differently, absolute values are not directly comparable.

3.1.1 Bakery products

Bakery products represented the highest-value category among Germany's food exports to China in 2025. German exports increased between 2023 and 2025 in both volume and value, while Chinese customs data show that imports from Germany increased by 25% between 2024 and 2025.

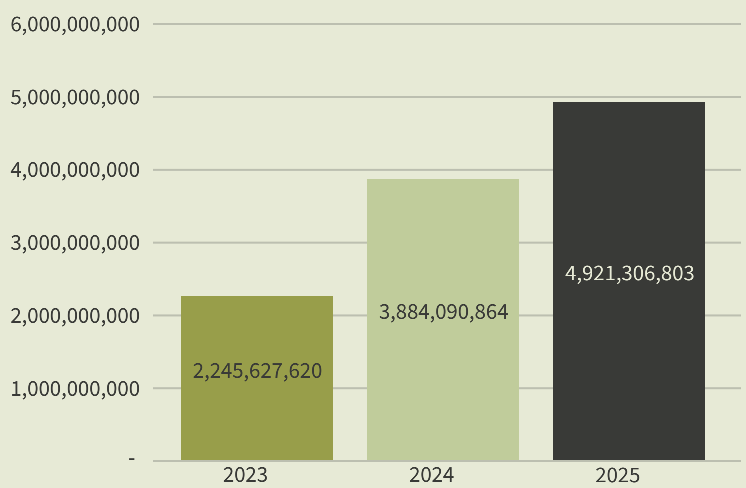
Figure 7: German bakery product exports to China by volume and value, 2023–2025

Source: BMLEH (2026)

Growth is concentrated in bakery ingredients, including malt extracts, flour, and starch-based products. China's total imports of these products increased by approximately 119% between 2023 and 2025. By contrast, imports of consumer-oriented baked goods, including bread, pastries, and biscuits, declined by 2% between 2024 and 2025, indicating a more mature and competitive segment. Other categories, including pasta, noodles, prepared cereals, and corn flakes, remain smaller in scale.

For German suppliers, the strongest opportunities are therefore likely to be in bakery ingredients and other food industry inputs, as well as selected higher-value consumer products and specialized baking applications.

Figure 8: Chinese imports of bakery ingredients, 2023–2025

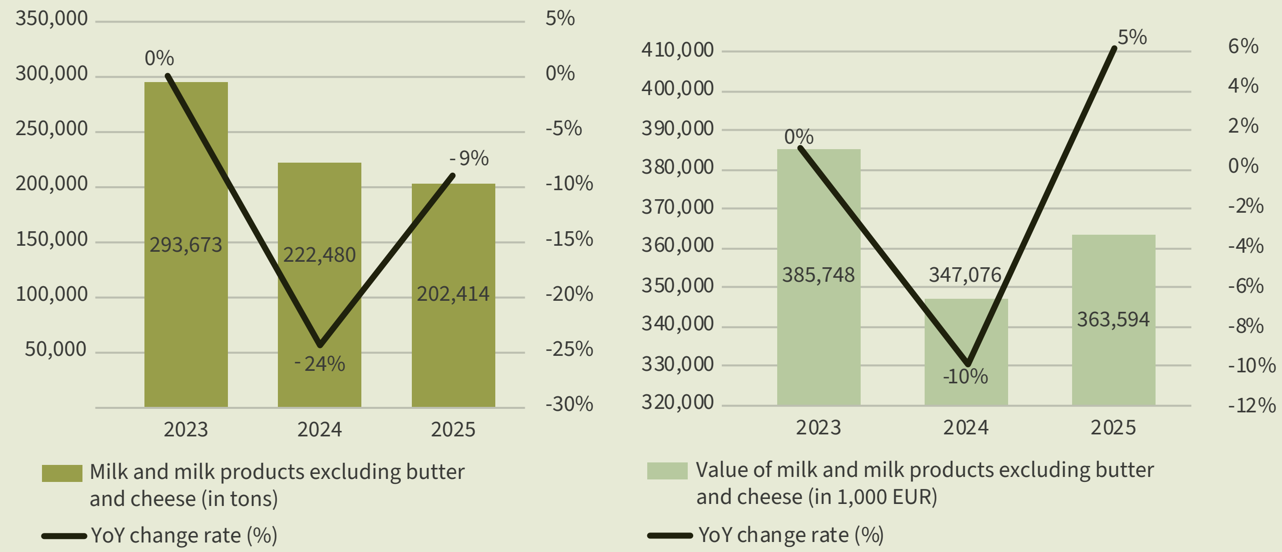


Source: GACC (2025)

3.1.2 Dairy products

German dairy exports to China are undergoing a structural shift. Export volumes have declined in recent years, while export value has remained comparatively resilient, indicating higher average export values. This suggests that future opportunities are less likely to come from volume growth alone and more from higher-value products, differentiated offerings, and specialized applications.

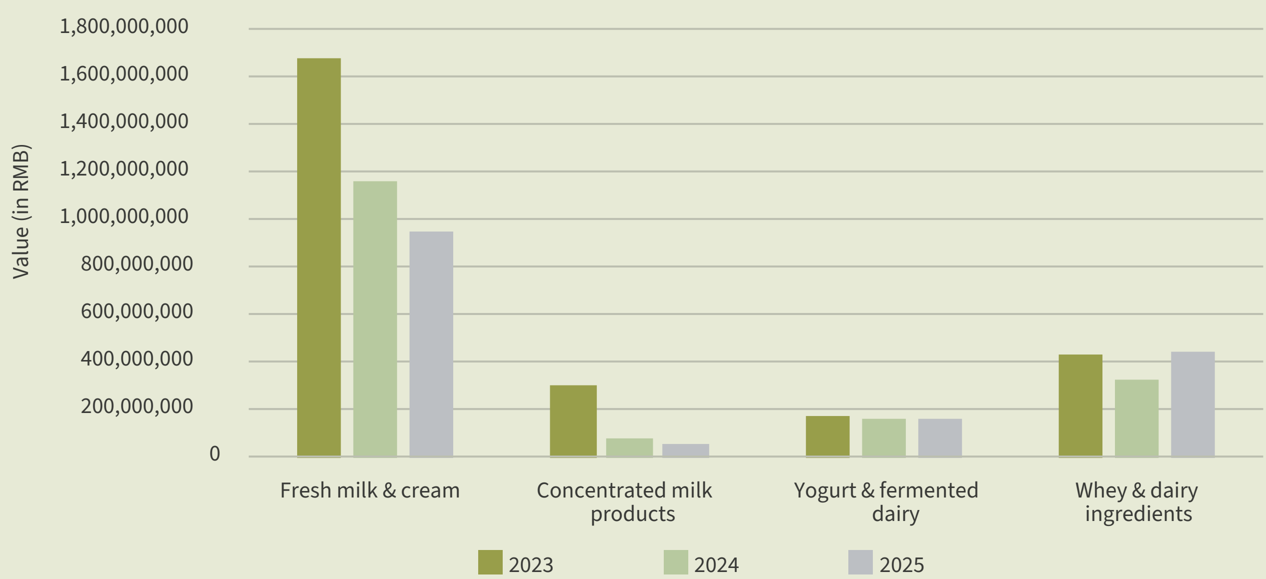
Figure 9: German milk and dairy product exports to China by volume and value, excluding butter and cheese, 2023–2025



Source: BMLEH (2026)

Import trends vary considerably across dairy categories. Chinese imports of German consumer-oriented products, including fresh milk, concentrated milk products, yogurt, and other fermented dairy products, have declined. By contrast, whey and other dairy ingredients have shown greater resilience, indicating continued demand for food processing, nutritional products, and functional food applications.

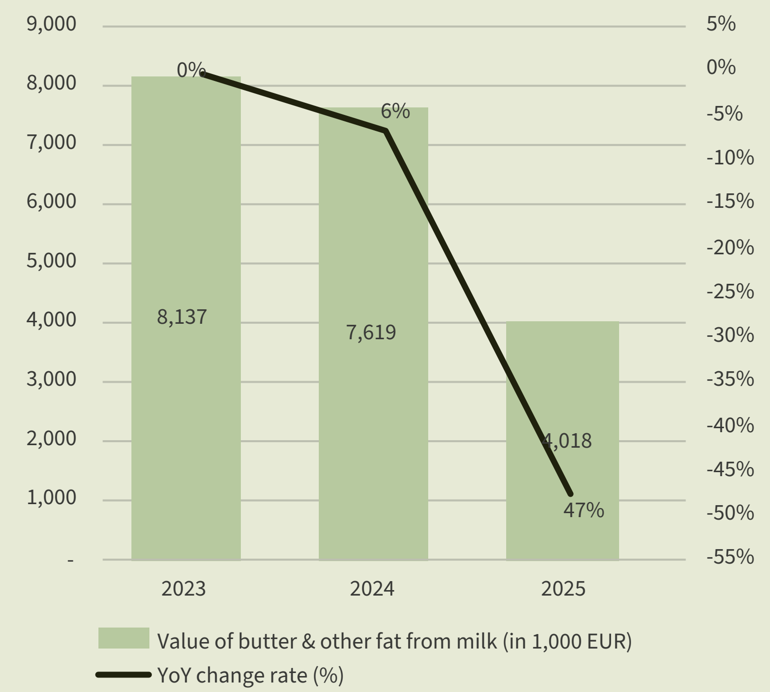
Figure 10: Chinese imports of German dairy products by category (excluding butter and cheese)



Source: GACC (2025)

German butter and cheese exports to China have also declined significantly in recent years. However, this does not necessarily indicate weak Chinese demand. China imported 196,600 tons of cheese in 2025, an increase of 13.9% year on year (GACC, 2025). The decline in German exports therefore points instead to a weakening German position in this market and stronger competition from other origins. New Zealand and Australia account for a large share of China's imported cheese, butter, and cream markets and may benefit from established supply chains and bilateral trade agreements (Dairy Industry Review, 2026).

Figure 11: German butter and cheese exports to China by value, 2023–2025



Source: BMLEH (2026)

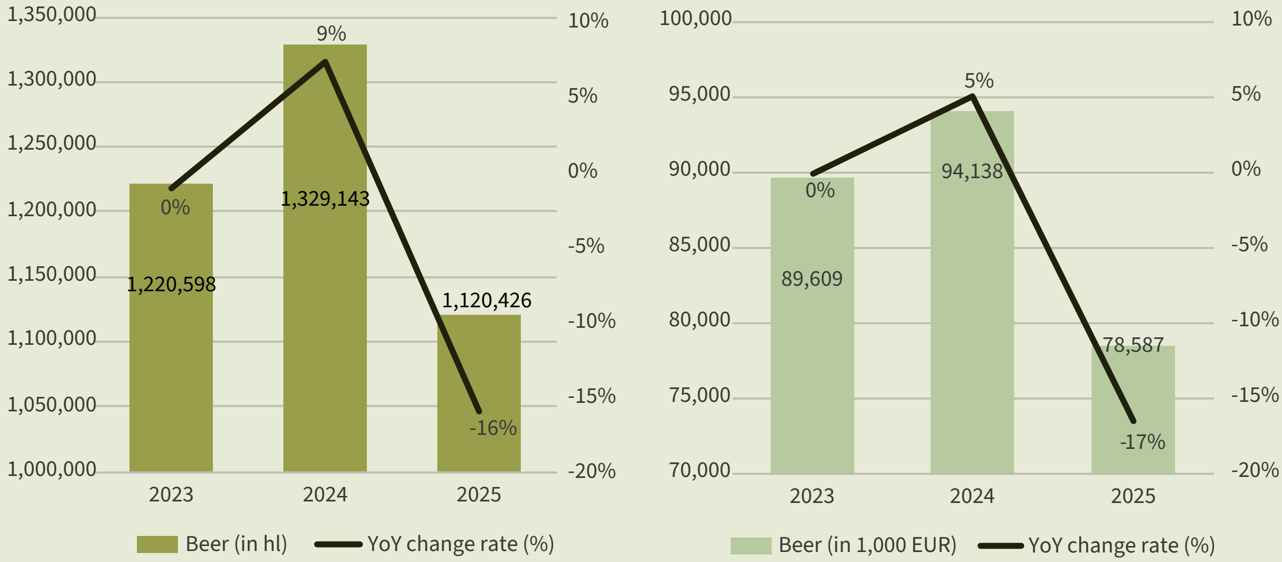
Longer-term opportunities remain in selected dairy segments. The *China Agricultural Outlook Report (2025–2034)* expects continued demand for processed cheese, whey products, and infant formula, while growth in China's catering and baking industries is expected to support demand for dairy ingredients such as butter, condensed milk, and whipping cream. Overall dairy imports are projected to reach 15.39 million tons by 2029 and 20.07 million tons by 2034 (China MARA, 2025).

For German suppliers, the key opportunity is therefore not broad-based volume growth. Increasing domestic and international competition means that future potential is more likely to lie in specialized products, high-quality ingredients, and applications where product quality and technical expertise provide a competitive advantage.

3.1.3 Beer

The outlook for German beer exports to China is more cautious. German exports increased from EUR 89.6 million in 2023 to EUR 94.1 million in 2024 before declining to EUR 78.6 million in 2025, with export volumes following a similar trend (BMLEH, 2026). Despite this decline, Germany remained China's largest supplier of imported beer over this period (GACC, 2025).

Figure 12: German beer exports to China by volume and value, 2023–2025



Source: BMLEH (2026)

The overall downward trend indicates increasing pressure on German beer exports. For German suppliers, beer therefore represents a more selective opportunity. Germany retains a strong position in China's imported beer market, but future opportunities are likely to be concentrated in premium, niche, and differentiated products rather than broad-based volume growth.

3.1.4 Wine

German wine exports to China show a mixed trend. In 2025, export volume declined by 2.8%, while export value increased by 7.7%, indicating higher average export values (BMLEH, 2026). Chinese customs data similarly show an increase in the value of German wine imports, although growth slowed following a stronger increase in 2024 (GACC, 2025).

Figure 13: German wine exports to China by volume and value, 2023–2025

Source: BMLEH (2026)

These developments need to be viewed against the broader contraction of China's imported wine market, which has declined since 2018. For German suppliers, opportunities are therefore likely to be concentrated in premium, niche, and differentiated products rather than broad-based market growth.

3.2 Emerging market opportunities

In an increasingly competitive market, opportunities for German SMEs are likely to come from value-added specialization rather than broad category growth. Three areas are particularly relevant: health-oriented product upgrading, organic and natural positioning, and convenience-oriented solutions.

3.2.1 Health-oriented product upgrading

Growing consumer attention to health and ingredients creates opportunities to upgrade existing food and beverage categories through reduction, addition, clean-label positioning, and personalized nutrition.

Reduction focuses on lowering ingredients that consumers increasingly seek to limit, such as sugar, fat, salt, and calories. Addition involves incorporating nutritional or functional ingredients, including protein, dietary fiber, vitamins, minerals, and probiotics. Interest in protein and dietary fiber is increasing, while nutritional innovation is expanding beyond traditional categories such as dairy and baby food into snacks and other everyday products (Mintel China, 2025).

Clean-label positioning responds to demand for simple, recognizable, and transparent ingredients. Products positioned around fewer artificial additives and colorings or natural ingredients are gaining attention, while stricter regulation of "zero-additive" claims increases the importance of transparent and science-based product communication (Tmall & Growth Insights, 2025).

Personalized nutrition provides a further opportunity, with products increasingly tailored to specific life stages, dietary requirements, and consumer groups, including children, older consumers, pregnant and breastfeeding women, and fitness-oriented consumers (China Food & Drinks Fair & COFCO Nutrition & Health Research Institute, 2026).

Table 7: Emerging health-oriented product opportunities

Health need	Category	Innovation direction	Product examples
Reduction	Reduced fat and calories	Technologies that reduce fat and calorie content while maintaining taste and texture	Low-fat snack chips, biscuits, and other reduced-calorie snacks
	Reduced sugar	Low-sugar formulations and alternative sweeteners that maintain taste and consumer acceptance	Zero-sugar beverages, sugar-free gummies, low-sugar biscuits, low-sugar dark chocolate
	Reduced salt (sodium)	Low-sodium formulations that maintain flavour while reducing sodium content	Low-sodium seasoning sauces and snacks
	Low glycemic index (GI)	Use of low-GI ingredients, dietary fibre, or processing technologies to slow glucose release	Low-GI noodles, nuts, and grain-based snacks
Addition	Nutritional balance	Addition of vitamins and minerals to improve nutritional value	Sports electrolyte drinks, vitamin gummies
	Functional ingredients	Use of protein, fibre, plant-based ingredients, and other functional components	High-protein drinks, high-calcium dairy products, functional snacks
	Gut health and immune support	Application of probiotics, fibres, and natural functional ingredients	Probiotic yogurt, meal replacement powders
Clean labels	Simple and transparent ingredients	Reduction of artificial additives and colourings and use of natural alternatives	Clean-label products, additive-free foods, HPP juices
Personalized nutrition	Products for specific consumer groups	Product development tailored to specific life stages and health needs	Gluten-free/lactose-free products, children's nutrition products, elderly nutrition products, prenatal and postnatal nutrition, sports nutrition

Source: Compiled by the author.

3.2.2 Certified organic food and natural products

China is one of the world's largest organic markets, ranking third globally in 2022 with a market value of EUR 12.6 billion, after the United States and Germany (Willer et al., 2025). Consumer interest is also reflected in retail trends; sales of natural and organic food products on Tmall Global increased by 14% year on year in 2025, while offline retailers are expanding their organic ranges through dedicated sections and private-label products (Tmall & Growth Insights, 2025; CCFA, 2025). Freshippo, for example, has expanded its organic portfolio across 14 product categories, including fresh produce, bakery products, beverages, and snacks (Freshippo, 2025).

Germany's established organic sector and diverse product portfolio provide potential advantages in this segment. Opportunities for German SMEs may include organic cereals and bakery products, baby and family foods, dairy products, snacks, tea, condiments, and other specialty packaged foods.

However, organic certification alone is not sufficient to differentiate German products in the Chinese market. Products also need to offer clear consumer benefits, supported by credible origin information and traceability. Companies should assess applicable Chinese certification requirements and ensure that product positioning fits the selected target consumers and sales channels (Merkle, 2026).

3.2.3 Convenience-oriented food solutions

Convenience-oriented food solutions include ready-to-eat, ready-to-heat, and ready-to-cook (3R) products (*see Glossary*), frozen and semi-prepared bakery products, meal solutions, snacks, and B2B foodservice products. Their key value proposition is reducing preparation time and effort while meeting consumption needs at home, at work, and on the go.

China's 3R market has expanded rapidly, reaching RMB 485 billion in 2024, an increase of 33.8% year on year, and is expected to reach RMB 749 billion by 2026. Growth is also linked to the transformation of supermarkets, which are increasingly integrating prepared foods and on-site processing into their fresh food offerings (NIQ & CCFA, 2026). Busy urban lifestyles are further supporting demand for products that reduce preparation time while maintaining taste and variety (Kantar Worldpanel, 2025).

Bakery products are particularly relevant to this opportunity because they lend themselves to ready-to-eat, ready-to-heat, frozen, and semi-prepared formats. China's bakery retail market reached RMB 611.07 billion in 2024, up 8.8% year on year, and is projected to reach RMB 859.56 billion by 2029 (Yiou Thinktank, 2025). This growth may also support demand for bakery ingredients and semi-finished products for bakeries, cafés, restaurants, and other foodservice operators. Snacks provide another relevant opportunity, particularly portable and easy-to-consume products such as nuts, meat snacks, biscuits, chocolate, and snack bars for workplace, on-the-go, and leisure consumption.

For German SMEs, opportunities may therefore include 3R meal solutions, frozen and semi-prepared bakery products, ready-to-use sauces, snacks, and B2B foodservice solutions. However, some convenience-oriented products require capabilities beyond those needed for conventional packaged food exports, including cold-chain management, shelf-life optimization, adaptation to local tastes, and partnerships with retailers or foodservice operators.

3.3 Positioning and perception of "Made in Germany"

"Made in Germany" remains a valuable asset in China's food and beverage market, with German products commonly associated with quality, reliability, and technical expertise. Germany's established recognition is also reflected in cross-border e-commerce: in 2025, Germany ranked seventh among countries of origin by Chinese consumer spending on Tmall Global (Tmall Global & Growth Insights, 2025).

However, German origin alone is no longer sufficient to differentiate products in an increasingly competitive market. Companies need to translate the positive associations with "Made in Germany" into concrete consumer benefits, such as superior quality, trusted ingredients, innovation, sustainability, or relevance to specific consumption occasions. This is particularly important as Chinese brands become more competitive in mid- and high-end segments and consumers increasingly evaluate products based on their individual benefits rather than foreign origin alone.

Market example: German products in Chinese retail

A range of German food and beverage products is already available in Chinese retail, including snacks, biscuits, dairy products, beer, and other products. They are sold both as imported branded products and as private-label products manufactured in Germany for Chinese retailers.

The products' marketing claims reflect several of the consumer trends discussed in this report. Common selling points include German origin, simple and transparent ingredient lists, organic production, and nutritional benefits.

For example, Lorenz potato chips are sold through Sam's Club China, Walmart China's membership retail chain. The product listing highlights "Imported from Germany," "Potatoes from German farms," and "Simple ingredients" as key selling points. The example illustrates how German origin, raw-material provenance, and ingredient-related attributes are translated into concrete marketing messages for Chinese consumers.

KEY TAKEAWAYS

- **Established German export categories show diverging trends**: Bakery products remain a particular strength, driven increasingly by bakery ingredients, while dairy is shifting toward specialized products and ingredients. Beer and wine face more challenging market conditions. Overall, future opportunities are likely to depend less on broad volume growth and more on value-added specialization, including premium, niche, and differentiated products.
- **Health-oriented product upgrading creates opportunities across established categories**: Reduced sugar, fat, salt, and calories; added protein, fiber, vitamins, minerals, and probiotics; clean labels; and personalized nutrition provide opportunities to adapt existing products to changing consumer demand.
- **Organic and convenience-oriented products provide additional growth opportunities**: Germany's established organic sector can support positioning in China's growing organic market, while rapid growth in 3R foods, bakery products, snacks, and foodservice solutions creates opportunities for products that reduce preparation time and effort.
- **"Made in Germany" remains an asset, but origin alone is not enough**: German products benefit from established recognition, but companies increasingly need to translate associations with German quality and reliability into concrete consumer benefits, such as trusted ingredients, innovation, sustainability, or relevance to specific consumption occasions.

4. OPPORTUNITIES AND RISKS FOR GERMAN SMES

For German food and beverage SMEs, China offers significant opportunities but requires a selective and well-prepared approach. Success depends on identifying suitable product categories, selecting appropriate market entry channels, establishing reliable local partnerships, and ensuring regulatory compliance. This chapter summarizes key market opportunities and risks and provides strategic recommendations for German SMEs.

4.1 Key market opportunities by product segment

Based on the analysis in previous chapters, Table 7 assesses selected product segments according to market demand, recent trends, and their potential for German SMEs.

Table 8: Key market opportunities and recommendations by product segment

Product category	Chinese market demand	Recent trend (2023–2025)	Opportunity assessment	Recommendation
Bakery ingredients, malt extracts, specialty flour	High	German exports increasing in volume and value	Strong	Strong existing demand and trade foundation. Focus on B2B channels, including industrial bakeries and ingredient distributors.
Finished and semi-finished bakery products	Medium	More mature market; demand varies by subcategory	Moderate	Target selected consumer segments through CBEC or local retailers. Differentiate through health positioning, specialty products, or adaptation to local tastes.
Whey and specialized dairy products	Medium–High	Whey and dairy ingredients comparatively resilient; consumer-oriented dairy imports declining	Strong	Focus on specialized applications, functional or nutritional positioning, and B2B opportunities. Relevant channels include food processing, nutrition, specialty retail, and CBEC.
Infant formula and infant nutrition products	High	Demand remains significant despite declining birth rates	Moderate–Strong	Potential remains, but demographic trends, regulatory requirements, and strong competition require careful assessment. Work with experienced local partners and evaluate CBEC where applicable.
Liquid milk and milk beverages	Low–Medium	Import demand declining	Caution	Large-scale opportunities are limited. Potential niches may exist in organic, high-protein, or other differentiated products.
Cheese and butter	Medium	German exports declining despite demand in selected segments	Moderate	Focus on selected applications, particularly bakery and foodservice, as well as premium retail and niche segments.
Beer	Medium	German exports and Chinese imports declining	Caution	Germany retains a strong position among imported beer suppliers, but opportunities are increasingly selective. Focus on premium, differentiated, and niche products.
Wine	Medium	Export volumes declining but export value increasing; overall import market contracting	Moderate	Focus on specialty wines, including Riesling, and differentiated premium positioning rather than broad volume growth.
Health-oriented and organic foods and snacks	High	Growing consumer interest and retail demand	Strong	Target clearly defined health, ingredient, or organic needs. Consider CBEC, specialty retailers, and relevant digital channels; carefully assess certification requirements.
Meat products	Low–Medium	German exports remain constrained by market access	Watch	Market access remains the primary constraint. Monitor veterinary certification and market-access developments before considering entry.

Source: Compiled by the author.

Opportunities beyond product exports: combining technology and products

Sino-German food trade should increasingly extend beyond conventional product exports toward a combined “technology + products” model. As China’s FMCG market becomes more competitive and domestic brands and product offerings continue to expand, German companies can differentiate themselves by combining food products and ingredients with capabilities in processing, preservation, packaging, automation, and quality control.

Germany is well positioned to pursue this approach. In 2024, global exports of food processing and packaging machinery reached EUR 54.5 billion, of which Germany accounted for EUR 10.625 billion, making it the world’s second-largest exporter after Italy (VDMA, 2026).

For German SMEs, opportunities in China therefore extend beyond the question of what products to sell to how they can support Chinese food companies in producing safer, more efficient, and higher-value-added products. Cooperation in areas such as processing technology, packaging, quality management, and process optimization can support Chinese companies in upgrading production. Compared with competing directly for consumer attention on increasingly crowded retail shelves, technology-based cooperation can create longer-term partnerships in areas such as technical standards, equipment, process optimization, training, and product development.

4.2 Market entry challenges and risks

4.2.1 Regulatory risks

Regulatory challenges for food products mainly relate to four areas: cross-border e-commerce eligibility, customs and overseas manufacturer registration, food safety and labeling compliance, and category-specific approval requirements. The regulatory environment is dynamic, and changes in domestic policies, market access requirements, or China–EU trade relations can affect market entry conditions. Compliance preparation can therefore require significant time and resources before market entry.

Compared with larger companies, SMEs may face greater challenges in absorbing these costs while maintaining competitive pricing. Regulatory complexity should therefore be considered from the outset when selecting target product categories, entry channels, and local partners.

4.2.2 Competition risks

German food and beverage exporters face competition from both established international suppliers and increasingly competitive Chinese brands. International competitors may benefit from strong distribution networks, established supply chains, and cost or trade advantages, while Chinese brands continue to improve product quality, innovation, and brand positioning.

Competitive conditions vary significantly by product category. In dairy, for example, German suppliers face strong competition from countries such as New Zealand and Australia. In beer, Germany retains a strong position among imported suppliers, but imported brands compete with domestic breweries that benefit from local recognition and distribution networks.

4.2.3 Consumer expectation risks

Changing consumer expectations create additional risks for products that are insufficiently differentiated or adapted to the Chinese market. Four areas require particular attention:

Price sensitivity and value perception: Foreign origin no longer automatically justifies a price premium. Products without a clear value proposition risk losing out to increasingly competitive domestic and international alternatives. German SMEs therefore need to demonstrate concrete benefits through quality, functionality, differentiation, or other relevant product attributes.

Transparency and credibility: Consumers increasingly expect clear and credible information on ingredients, production, and certifications, particularly for health- and nutrition-related products. Compliance alone may therefore not be sufficient; product information also needs to be accessible and understandable to consumers.

Reputation management: Food safety incidents, misleading claims, or negative consumer experiences can quickly affect brand reputation through digital platforms and social media. Consistent product quality and credible communication are therefore essential.

Local taste and product adaptation: Taste remains a fundamental purchase driver. Products that do not fit local preferences or consumption habits may struggle even when they perform well in other markets. Adaptation may involve flavors, ingredients, pack sizes, product formats, or usage scenarios.

4.3 Strategic recommendations for German SMEs

German SMEs should adopt a selective, compliance-oriented, and partnership-based approach to the Chinese market. Opportunities exist for differentiated, value-added products and solutions, but market entry requires careful product selection, regulatory preparation, localization, and appropriate distribution channels.

The following recommendations provide practical guidance for German SMEs considering market entry in China:

1. Align market entry with policy priorities and regulatory developments

German SMEs should monitor both China's policy priorities and evolving regulatory requirements. Policy directions related to health, sustainability, consumption upgrading, and food quality can create market opportunities, while changes in regulations, tariffs, and market access requirements can directly affect market feasibility and compliance costs. These factors should be assessed before selecting product categories and entry strategies.

2. Start small and test the market before scaling up

SMEs should avoid committing significant resources before testing market demand. Initial market research should assess target consumers, product positioning, distribution channels, competitors, and potential partners. Starting with a limited number of high-potential products allows companies to test market acceptance, gather feedback, and refine their strategy before scaling up.

Trade fairs, business promotion events, and study tours can support this exploratory phase by providing market insights, buyer contacts, and opportunities to identify potential partners.

3. Shift from origin-based branding to value-based positioning

"Made in Germany" remains a valuable asset, but German origin alone is no longer sufficient to differentiate products. Companies need to translate the positive associations of German origin into concrete consumer benefits, such as product quality, food safety, nutrition, functional ingredients, traceability, sustainability, innovation, or convenience.

4. Select an entry model that matches product characteristics and company resources

There is no single market entry model suitable for all German SMEs. The appropriate approach depends on the product category, regulatory requirements, target consumers, available resources, and the level of operational control the company wants to maintain.

Table 9: Market entry options for German SMEs

Entry option	Main function	Key considerations
Trade fairs and business promotion activities	Market exploration, buyer contacts, competitor observation, partner identification	Particularly useful before market entry to assess demand and establish initial networks. Relevant events include the China International Import Expo (CIIE), Canton Fair, ChinaShop, and BIOFACH China, alongside business promotion activities and study tours organized by German and European business support organizations.
Import/ export trading companies	Customs clearance, documentation, warehousing, logistics, and compliance support	Common option for SMEs with limited local operational capacity; partner selection is critical.
CBEC platforms	Market testing, brand launch, and direct consumer access	Can provide a comparatively flexible route for testing demand but requires continuous investment in platform operations, content, traffic generation, and customer service.
Tmall Partners (TPs) and other e-commerce service providers	Store setup and operation, digital marketing, campaigns, and livestreaming	Clearly define budgets, KPIs, scope of services, responsibilities, and access to market and customer data.
Local distributors and retailers	Import, distribution, retail access, direct procurement, and potential private-label cooperation	Can provide broader market access but requires careful partner selection and sufficient supply and inventory capacity.
B2B industrial partnerships	Ingredients, processing and packaging technologies, quality-control systems, and technical cooperation	Particularly relevant to the “technology + products” model and can support longer-term cooperation with Chinese food companies.

Source: Compiled by the author.

The most suitable market entry approach will often combine several of these options over time. German SMEs should therefore approach China through a gradual and evidence-based strategy, testing demand and partnerships before committing to larger-scale expansion.

KEY TAKEAWAYS

- **China offers opportunities, but companies need to be selective**: Market potential differs considerably across product categories. Bakery ingredients, specialized dairy products, and health-oriented and organic foods show particular potential, while categories such as liquid milk, beer, and meat require a more cautious approach.
- **Opportunities extend beyond product exports**: Germany’s strengths in food processing, packaging, automation, quality management, and other technologies can complement product and ingredient exports. Such cooperation can help German companies build longer-term B2B partnerships rather than competing solely for consumer attention in an increasingly crowded retail market.
- **German origin is an advantage, but products need to deliver clear value**: “Made in Germany” alone is no longer sufficient for differentiation. German SMEs need to translate their strengths into concrete benefits for Chinese consumers.
- **Start small, test, and build partnerships before scaling**: Market entry should be gradual and evidence-based. Companies should test demand, carefully assess regulatory requirements, identify reliable partners, and select entry channels that match their products, resources, and objectives before committing to larger-scale expansion.

3R

Food products designed for immediate consumption or requiring minimal preparation, including ready meals, meal kits, and semi-prepared foods.

6.18 Shopping Festival

Major Chinese online shopping festival held around 18 June, originally launched by JD.com and now involving most major e-commerce platforms.

11.11 Shopping Festival (Singles' Day)

China's largest annual online shopping festival, held on 11 November and characterized by extensive promotions across major e-commerce platforms.

Brand private domain

A brand's own digital channels for directly reaching and retaining customers, typically through WeChat groups, Mini Programs, membership programs, or proprietary apps.

City tiers (tier 1 – tier 5 cities)

An unofficial classification of Chinese cities based on factors such as economic development, population, purchasing power, and commercial importance.

Content-driven e-commerce

E-commerce in which consumers discover and purchase products through digital content such as short videos, livestreams, social media posts, and recommendations. Typical platforms include Douyin, Kuaishou and Xiaohongshu (RED).

Cross-border e-commerce (CBEC)

A regulated channel allowing Chinese consumers to purchase eligible products directly from overseas sellers through approved online platforms. For foreign companies, CBEC can simplify market entry because eligible products may benefit from simplified import procedures, preferential tax treatment, and exemptions from certain requirements applicable to general trade imports. Major platforms include Tmall Global, JD Worldwide and Kaola.

Douyin (抖音)

China's leading short-video platform and an important channel for content-driven and livestreaming e-commerce. Owned by ByteDance, Douyin is the Chinese counterpart to TikTok, but operates as a separate platform.

Fast-moving consumer goods (FMCG)

Frequently purchased consumer products, including food and beverages, personal care products, and household goods.

Instant retail

A retail model that integrates online ordering with nearby physical stores. Consumers purchase products via an app or online platform, after which goods are picked from local stores or front-end warehouses and delivered—typically within 30 to 60 minutes—to satisfy immediate consumption needs. Major instant retail platforms include Meituan, JD Seconds Delivery, Ele.me and Taobao Instant Commerce.

JD.com (京东)

One of China's largest e-commerce platforms, with a strong proprietary logistics and delivery network.

Kuaishou (快手)

Major Chinese short-video and livestreaming platform with integrated e-commerce functions.

Live-streaming e-commerce

A form of online retail in which products are promoted and sold through live video broadcasts. Hosts or influencers demonstrate products, answer questions in real time and provide direct purchase links, creating an interactive shopping experience. Major live-streaming platforms include Douyin, Kuaishou and Taobao Live.

Pang Dong Lai (胖东来)

Influential regional supermarket chain known for strong customer service, fresh and prepared foods, and private-label products.

Pinduoduo (PDD, 拼多多)

Major Chinese e-commerce platform known for value-oriented shopping and its group-buying model, which encourages consumers to purchase products together to obtain lower prices. It has a particularly strong presence among price-conscious consumers and in lower-tier cities.

RED (Xiaohongshu / Rednote, 小红书)

RED (also known as Little Red Book or Rednote) is one of China's leading lifestyle and social media platforms. It combines user-generated content, influencer marketing and e-commerce, allowing consumers to discover products through reviews, recommendations and short-form content before purchasing them either directly on the platform or through linked online stores. RED is particularly influential among younger, urban consumers and plays a major role in brand discovery, product research and premium brand marketing.

Silver economy/ silver-hair economy

An economic concept referring to products and services designed for China's rapidly growing elderly population. It encompasses sectors such as healthcare, nutrition, elderly care, age-friendly consumer products, tourism and leisure services, reflecting the increasing purchasing power and consumption potential of older consumers.

Taobao / Tmall (淘宝 / 天猫)

Major e-commerce platforms operated by Alibaba; Taobao focuses mainly on marketplace retail, while Tmall primarily hosts brands and professional retailers.

Tmall Partner (TP)

Specialized service provider that helps brands operate stores and marketing activities on Tmall and other Chinese e-commerce platforms.

WeChat Mini Program

Lightweight application operating within WeChat that can provide functions such as e-commerce, membership services, and customer engagement without requiring a separate app.

A. Methodology and limitations

This report combines desk research with expert interviews. The desk research draws on official German and Chinese statistics, market and industry reports, and other recent secondary sources. Key statistical sources include China's National Bureau of Statistics (NBS), the General Administration of Customs of the People's Republic of China (GACC), and the German Federal Ministry of Agriculture, Food and Regional Identity (BMLEH). Consumer and market analysis draws on studies from research institutions, consultancies, industry associations, and market research providers. Expert interviews were used to complement and validate findings from secondary sources and provide practical industry perspectives.

The report primarily uses the most recent data available at the time of research. Consumer trends, profiles, purchasing behavior, and market developments are derived from multiple sources rather than original consumer surveys. Findings in these areas should therefore be understood as indicative of broader market trends rather than representative of all Chinese consumers.

For the analysis of German food and beverage trade (see chapter 3), German export statistics from BMLEH are complemented by Chinese import statistics from GACC. The two datasets use different product classifications and group individual products differently. Their absolute values are therefore not directly comparable. Instead, both sources are used to corroborate the direction of market trends and, where possible, analyze developments within individual product subcategories. GACC data based on customs product classifications also allow for a more detailed breakdown of selected categories. Differences between the two datasets may additionally arise from statistical methodology, timing, valuation, and exchange-rate effects.

The report does not constitute investment or market-entry advice. Market conditions, regulatory requirements, and consumer preferences can change rapidly, and companies should conduct product- and company-specific due diligence before entering the Chinese market.

B. Supplementary information

Table A1: Selected laws, regulations, and standards relevant to food imports

Category	Name of the regulation (Chinese)	Name of the regulation (English)	Key relevance	Official English translation
Legal framework	*《中华人民共和国食品安全法》(2025 年修订)*	*Food Safety Law of the People's Republic of China* (last amended in 2025)	Imported food must comply with China's national food safety standards	/[1]
	《食品安全法实施条例》	*Regulations for the Implementation of the Food Safety Law of the People's Republic of China* (first issued in 2009, last amended in 2019)	Clarification of regulatory responsibilities and penalty mechanisms	/
	《中华人民共和国进出境动植物检疫法》	*Law of the People's Republic of China on the Entry and Exit Animal and Plant Quarantine* (first issued in 1991, last amended in 2009)	Food of animal or plant origin must be subject to quarantine approval	/
	《中华人民共和国进出口商品检验法》	*Law of the People's Republic of China on Import and Export Commodity Inspection* (first issued in 1989, last amended in 2021)	Goods subject to statutory inspection upon import must undergo customs inspection	/
	《中华人民共和国进出口食品安全管理办法》海关总署令第 249 号	*Measures of the People's Republic of China for the Administration of Import and Export Food Safety* (GACC Decree No. 249, 2021)	Regulations on the supervision and management of imported food safety	http://jckspj.customs.gov.cn/spj/2021-12/02/article_2025121606062222100.html

1 *For the latest regulatory requirements, companies can consult the official database of the State Administration for Market Regulation (SAMR), which provides the full text of relevant laws, regulations, and national standards.*

Category	Name of the regulation (Chinese)	Name of the regulation (English)	Key relevance	Official English translation
	境外生产企业强制注册制度（海关总署 248 号令） * 新版《中华人民共和国海关进口食品境外生产企业注册管理规定》(海关总署 280 号令) 将于 2026 年 6 月 1 日起代替海关总署令第 248 号。	*Regulations of the General Administration of Customs of the People's Republic of China on the Registration and Administration of Overseas Manufacturers of Imported Food* (GACC Decree No. 280; to replace GACC Decree No. 248 as of 1 June 2026).	From 1 January 2022, all overseas enterprises engaged in the production, processing or storage of food exported to China must complete customs registration and obtain a registration number in China.	http://www.customs.gov.cn/customs/2026-03/18/article_2026031809353159843.html
Import/ Export Trade Regulations and Standards	《食品安全国家标准预包装食品标签通则》（GB 7718-2025，2027 年 3 月 16 日起实施）	*National Food Safety Standard — General Standard for the Labeling of Prepackaged Foods* (GB 7718-2025; effective 16 March 2027)	All visible labelling on imported prepackaged food must comply with the provisions of Chinese laws, regulations and food safety standards.	
	《预包装食品营养标签通则》(GB28050-2025，2027 年 3 月 16 日实施）	*National Food Safety Standard – General Rules for Nutrition Labeling of Prepackaged Foods* (GB 28050-2025; effective 16 March 2027)	Mandatory national standard governing nutritional information on food packaging.	
	食品添加剂使用标准（GB 2760）	*National Food Safety Standard — Standard for Uses of Food Additives* (GB 2760-2024; effective 8 February 2025)	All imported food must comply with the requirements of the 'National Food Safety Standard: Standards for the Use of Food Additives' (GB 2760).	
	《跨境电子商务零售进口商品清单（2019 年版、2022 年版）》	*List of Cross-Border E-Commerce Retail Imports* (2019 and 2022 Edition)	It is stipulated that only goods included in the list are eligible for tax incentives under the cross-border e-commerce retail import scheme.	https://gss.mof.gov.cn/gzdt/zhengcefabu/202202/t20220221_3788662.htm
	跨境电商零售进口负面清单制度	*Negative-List System for Cross-Border E-Commerce Retail Food Imports* (under development)	Food from epidemic-affected areas that has been expressly suspended from import, as well as food subject to emergency measures due to major quality and safety risks, are included in the negative list and subject to real-time adjustments.	https://www.gov.cn/gongbao/2025/issue_11966/202504/content_7017467.html
	未准入境食品信息	*GACC List of Imported Food Denied Entry*	In accordance with the national food safety standards in force at the time or the requirements of relevant laws and regulations, import inspections were carried out; non-compliant imported foodstuffs were returned or destroyed at the port of entry and were not granted market access.	https://www.gacc.app/recalls
	《中华人民共和国海关综合保税区管理办法》（海关总署令第 256 号）	*Measures of the General Administration of Customs of the People's Republic of China for the Administration of Comprehensive Bonded Zones* (GACC Decree No. 256, 2022)	Provides a regulatory framework for bonded warehousing, distribution, processing and exhibition activities within the comprehensive bonded zone, thereby assisting importing enterprises in planning their supply chains.	http://www.customs.gov.cn/customs/2022-01/14/article_2025121221035478511.html

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Publication information

Author: Chong Li

Edited and published by: Sino-German Agricultural Centre (DCZ)

Funded by: German Federal Ministry of Agriculture, Food and Regional Identity (BMLEH)

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