BRANDING
RECORDS

Strategic Market Report

# Italian Food & Wine Exports to China

*Consumer Trends, Category Opportunities, and Competitive Landscape 2026*

**#ItalianWine** maintains a high-intent audience **#MediterraneanDiet** has emerged as a cultural and nutritional movement, growing at an accelerated pace. Furthermore, Italian food content not only is highly visible but also as significantly more engaging than its French and Spanish counterparts.

In China’s digital-first food and beverage market, social commerce is no longer a secondary channel, it is the main gateway to the consumer’s mind and wallet.

RED (Xiaohongshu), China's leading lifestyle and social commerce platform, serves as a critical barometer for understanding the shifting perceptions around imported food and beverage categories.

This report analyzes how Italian food and wine brands can win on platforms like Xiaohongshu (RED), decode evolving consumer segments (from Gen Z to high-net-worth collectors), and turn cultural appeal into measurable growth.

# Index

# 1. Market Background: Import Trends and Structural Shifts

# China's Major Imported Food Categories from Italy

According to recent trade data and *the 2025 China Imported Food Industry Report*, Italian food imports to China are clearly moving upmarket, driven by high value-added and premium offerings.

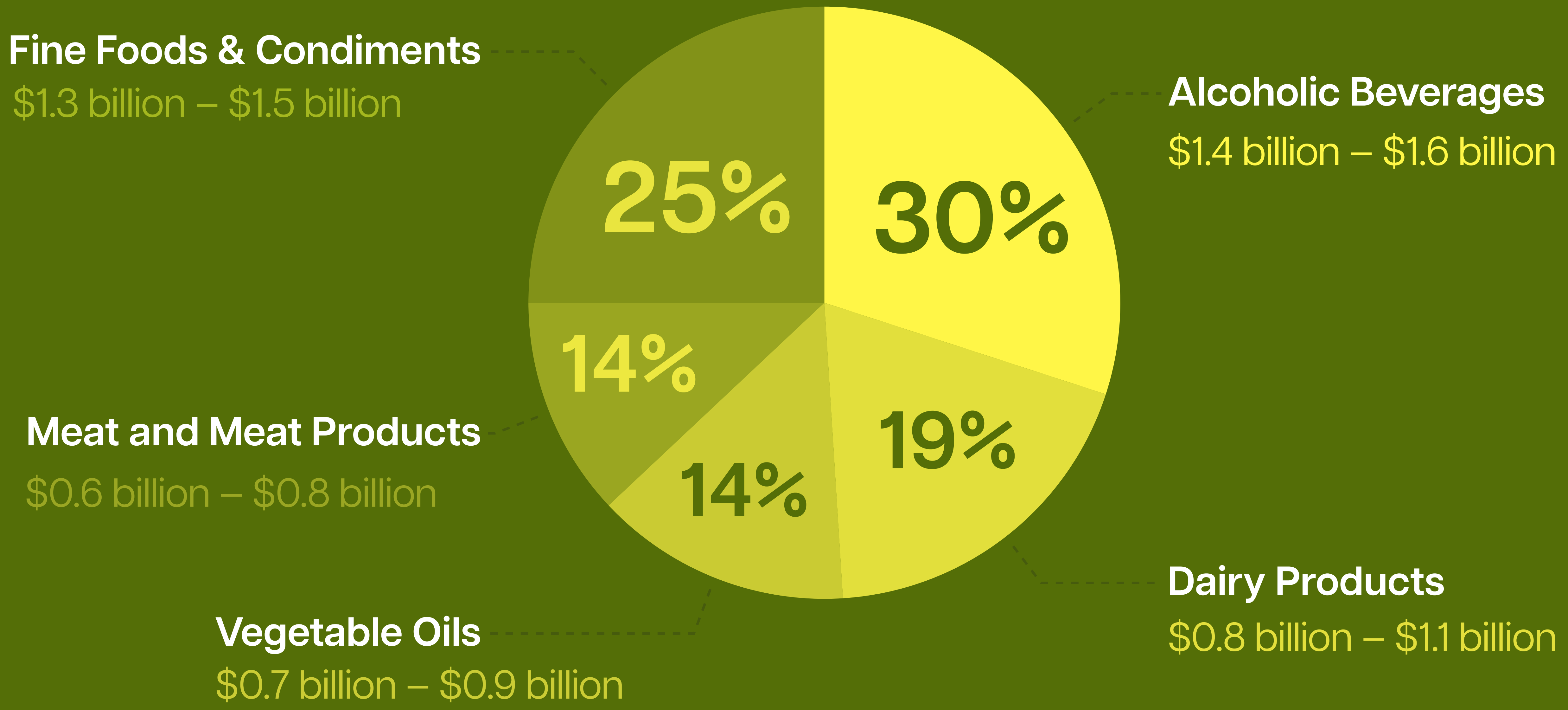
The chart on the right presents the import value and share analysis of key product categories.

Total Food Imports from Italy to China

**$520 million**

Year-over-Year Growth Rate

**+6.8%**




Source: General Administration of Customs of China (GAC), 2025 Import & Export Trade Database. https://www.customs.gov.cn

# Hashtag & Digital Marketing Analytics for Red Trends

小红书

In the era of digital word-of-mouth, social commerce platforms have become the primary arena where consumer preferences are voiced, shared, and amplified.

RED (Xiaohongshu), China's leading lifestyle and social commerce platform, serves as a critical barometer for understanding the shifting perceptions around imported food and beverage categories.

#ItalianWine retains a high-intent audience, while the #MediterraneanDiet has accelerated into a major cultural and nutritional movement. Notably, Italian food content outperforms French and Spanish rivals in both visibility and engagement.

#ItalianWine 🍷

**16,200,000**

views as of April 2026

#ItalianWine 🍷

**93,000**

notes as of April 2026

**Mediterranean Diet** (#地中海饮食) 🫒

184.9m views | 396.4k notes

Food Bloggers 📷

**8%–12%**

of all KOLs on RED

Competitive Category Analysis


The Growth of the #MediterraneanDiet

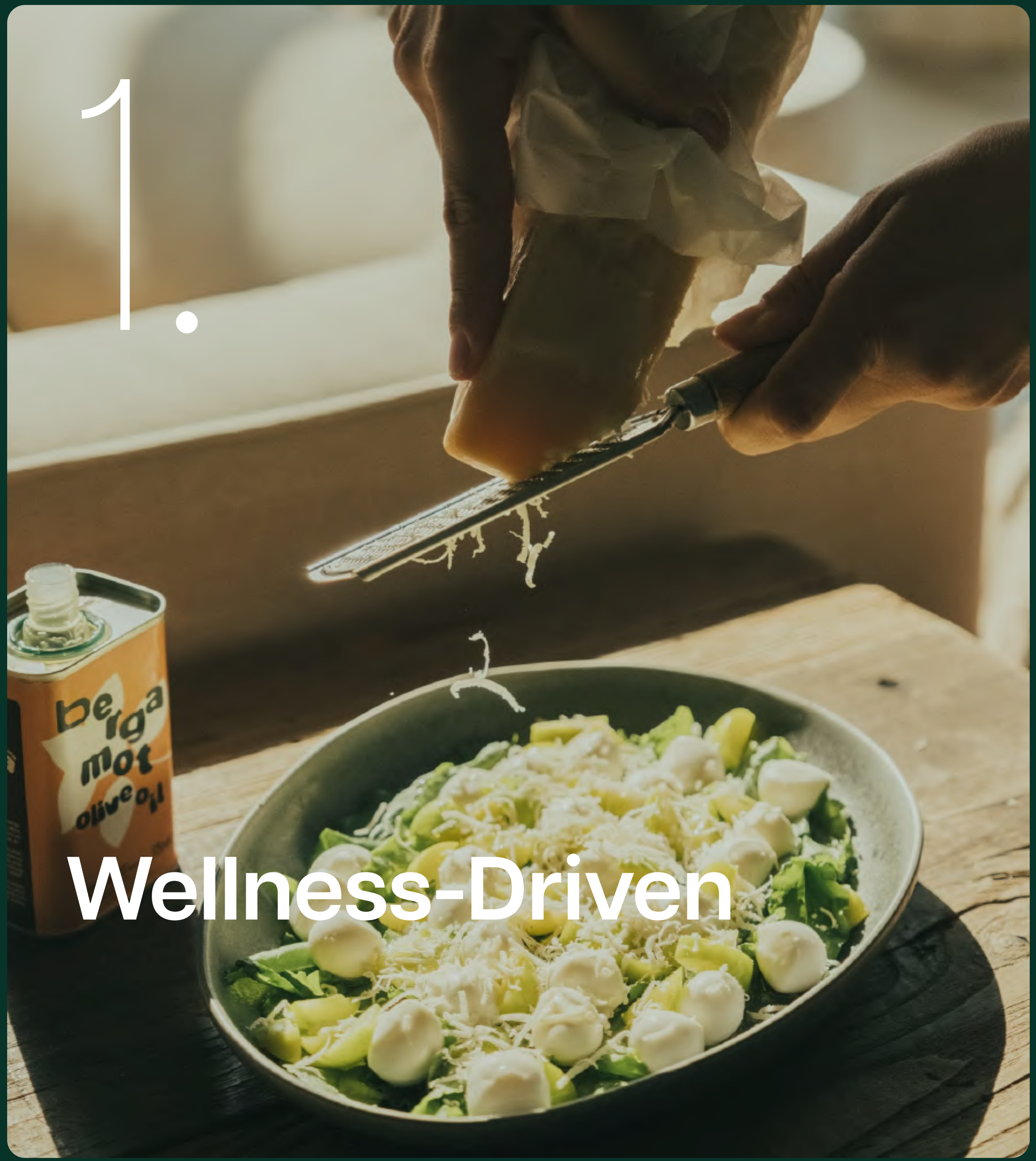
**+250%** 📈

between 2024 and 2025.

# 3 Core Trends Driving Imported Food Consumption

Chinese consumer behavior regarding imported food has undergone a fundamental shift. No longer driven by mere novelty or status.

Purchasing decisions are increasingly shaped by health consciousness, product provenance, and everyday usability. The following three core trends define this evolving landscape.





# 2. Consumer Insights Segmentation, Scenarios, and Perceptions

# The Key Consumer Segments

## 1.High-Net-Worth Collectors

In China, High-Net-Worth Individuals (HNWIs) are typically defined as individuals or households with investable assets (excluding primary residence) of **€750,000 or above.**

This segment is primarily aged between 40 and 60. They are predominantly concentrated in first-tier cities such as Beijing, Shanghai, Guangzhou, and Shenzhen, as well as strong second-tier cities like Hangzhou and Suzhou. This group demonstrates a high level of risk tolerance and a strong awareness of asset allocation.

## High-Net-Worth Collectors: Perception of Italian Brands

Business banquets,artisanal integrity.

For High Net Worth Collectors, **for this segment, the primary focus remains on wine, particularly investment-grade red wines.** Italian brands hold a respected yet secondary position relative to France within the prestige hierarchy. In the investment grade wine segment, France remains the undisputed gold standard for status signaling, auction liquidity, and long term appreciation, led by *Bordeaux, Burgundy, and Champagne*. Italian icons such as *Barolo, Brunello, Sassicaia, and Masseto* command strong respect among connoisseurs, yet they are often perceived as "the collector's choice for those who already know France." This positioning casts Italian wines as a signal of deeper category knowledge rather than pure status.

In the context of business banquets, Italian products face a perception gap. French wines, especially Lafite, Latour, or Dom Pérignon, are the default safe choice for impressing clients or government officials, as they carry universally recognized symbolic capital. Italian wines, by contrast, are seen as more terroir driven, intellectually rewarding, and food friendly. These qualities appeal to passionate collectors but may be lost on a general business audience. However, for private tastings among serious collectors or high end Italian restaurants, Italian labels are celebrated for their authenticity, complexity, and artisanal integrity.

**Intellectually Rewarding** | **Terroir-driven** | **Investment assets**

Overall Awareness of Italian F&B Brands

Source: General Administration of Customs of China (GAC), 2025 Import & Export Trade Database. https://www.customs.gov.cn

# The Key Consumer Segments

## 2.New Middle-Class Families

China's New Middle-Class Families are typically defined as households with an annual income between **€25,000 and €65,000.**

They reside in first and second-tier cities, hold a college degree or higher, and are predominantly composed of post-80s and post-90s generations. These are primarily married couples with children.

## New Middle-Class Families: Perception of Italian Brands

Authentic, family-oriented, and health-enhancing

For New Middle-Class Families, Italian brands are perceived as authentic, family-oriented, and health-enhancing. Italian food products are **approachable and usable in everyday home cooking,** fitting seamlessly into routines ranging from quick weekday breakfasts to wholesome children's meals.

Olive oil, pasta, and cheese from Italy are seen not as indulgences but as practical investments in family wellness, especially among parents who value clean labels, Mediterranean dietary patterns, and nutritious children's meals. **Italian cheeses like Parmigiano Reggiano or mozzarella are especially appealing because they are versatile, natural, and easy to incorporate into child-friendly recipes such as pasta, omelets, or homemade pizza.** New Middle-Class Families buy for peace of mind and daily nourishment.

New Middle-Class Families buy for peace of mind and daily nourishment. Italian brands that emphasize transparency, family heritage, and child-friendly applications (e.g., easy-to-use olive oil for baby food, or mild cheese for homemade pizza night) will resonate most strongly with this segment.

**Price-sensitive** **Value-driven**

Overall Awareness of Italian F&B Brands

Source: General Administration of Customs of China (GAC), 2025 Import & Export Trade Database. https://www.customs.gov.cn

# The Key Consumer Segments

## 3.Gen Z / Young Women

In China, Gen Z young women are typically defined as individuals born between 1997 and 2012, with growing disposable income and strong decision-making power over personal and household consumption.This segment is primarily aged between 18 and 28.

They are predominantly concentrated in first-tier and second-tier cities. In terms of income, the majority in first-tier cities earn between **€1,280 and €2,560** per month, with additional financial support from family often available.

## Gen Z / Young Women: Perception of Italian Brands

Self-indulgence,experiential consumption.

Chinese Gen Z young women generally perceive Italian wine as **authentic, heritage-rich, and tied to la dolce vita (the sweet life)**.

French brands (wine, cheese, pastries) are often perceived as formal, ceremonial, and status-driven — suitable for business banquets or impressing parents, but not for everyday self-reward. Italian brands, in contrast, feel warmer, less intimidating, and more "me-friendly." A young woman might hesitate to open a bottle of Bordeaux on a Tuesday night, but she would happily pour herself a glass of Italian Pinot Grigio or Moscato d'Asti while watching Netflix or winding down after work.

For Gen Z young women, Italian wine holds untapped potential. When presented through **storytelling, lifestyle content,** and approachable tasting notes, it resonates with their values of authenticity, self-indulgence, and experiential consumption.

Aesthetics | Self-rewarding | Light-buzz

Overall Awareness of Italian F&B Brands

Source: General Administration of Customs of China (GAC), 2025 Import & Export Trade Database.

# 3. Category Opportunities:

## Wine, Dairy, and Confectionery

# Sparkling Wine: Performance in the Chinese Market

Italian wine in the Chinese market is at a critical juncture of structural realignment and niche category breakout. Despite total import value falling to a ten year low of approximately €82 million in 2025, sub segments including white wine, sparkling wine, and low alcohol wine are gaining rapid traction. These emerging categories present a new window of opportunity for Italian brands.

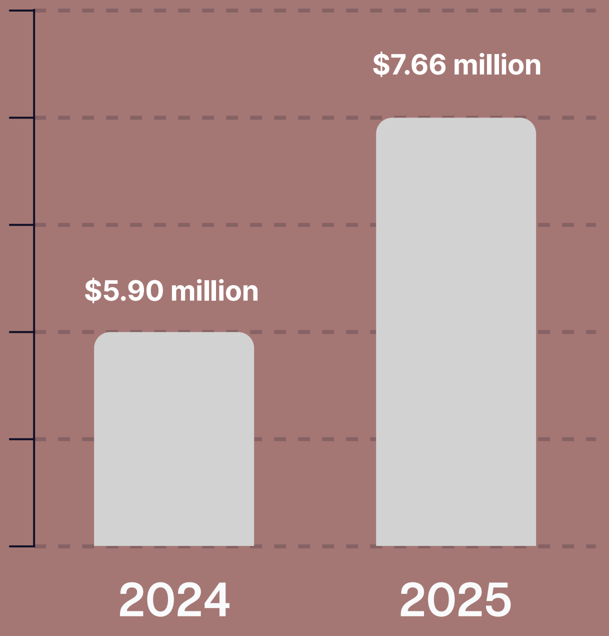
## Sparkling Wine: Italian Sparkling Exports to China – H1 2025

- Prosecco
- Moscato d'Asti
- Light Buzz
- Social Drivers

**+71%** Import Value

**+57%** Import Volume

**$7.66M** H1 2025




## Low & No Alcohol Wine

Health Oriented, Low Calorie, Beginner Friendly

**69%**

of respondents are **optimistic about it.**

## Hashtag & Digital Marketing Analytics

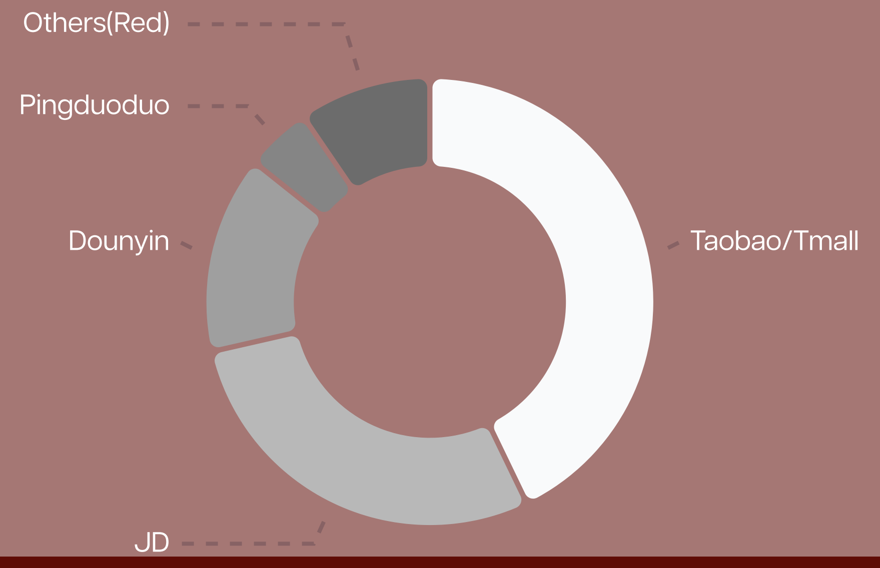
**Sparkling Wine #起泡酒**
78.5 m views | 456.3k notes

**Daily Drinking #喝酒日常**
5.4B views | 20M notes

**Moscato d'Asti #莫斯卡托**
26.7 m views | 147.3k notes

**Light Buzz #微醺**
3B views | 11.4M notes

## The Rise of E-Commerce



# Dairy Products: Cheese Market Dynamics

Italian cheese has emerged as one of the fastest growing categories in China's imported dairy market. Driven by rising demand for Western style cooking, home baking, and the continued expansion of China's tea and coffee shop chains, Italian cheeses such as Parmigiano Reggiano, Grana Padano, Mascarpone, and Burrata are finding new applications beyond traditional restaurant use.

Italian cheese exports to China in 2024

**€71,000,000**

China Cheese demand in 2025

**+15.7%**

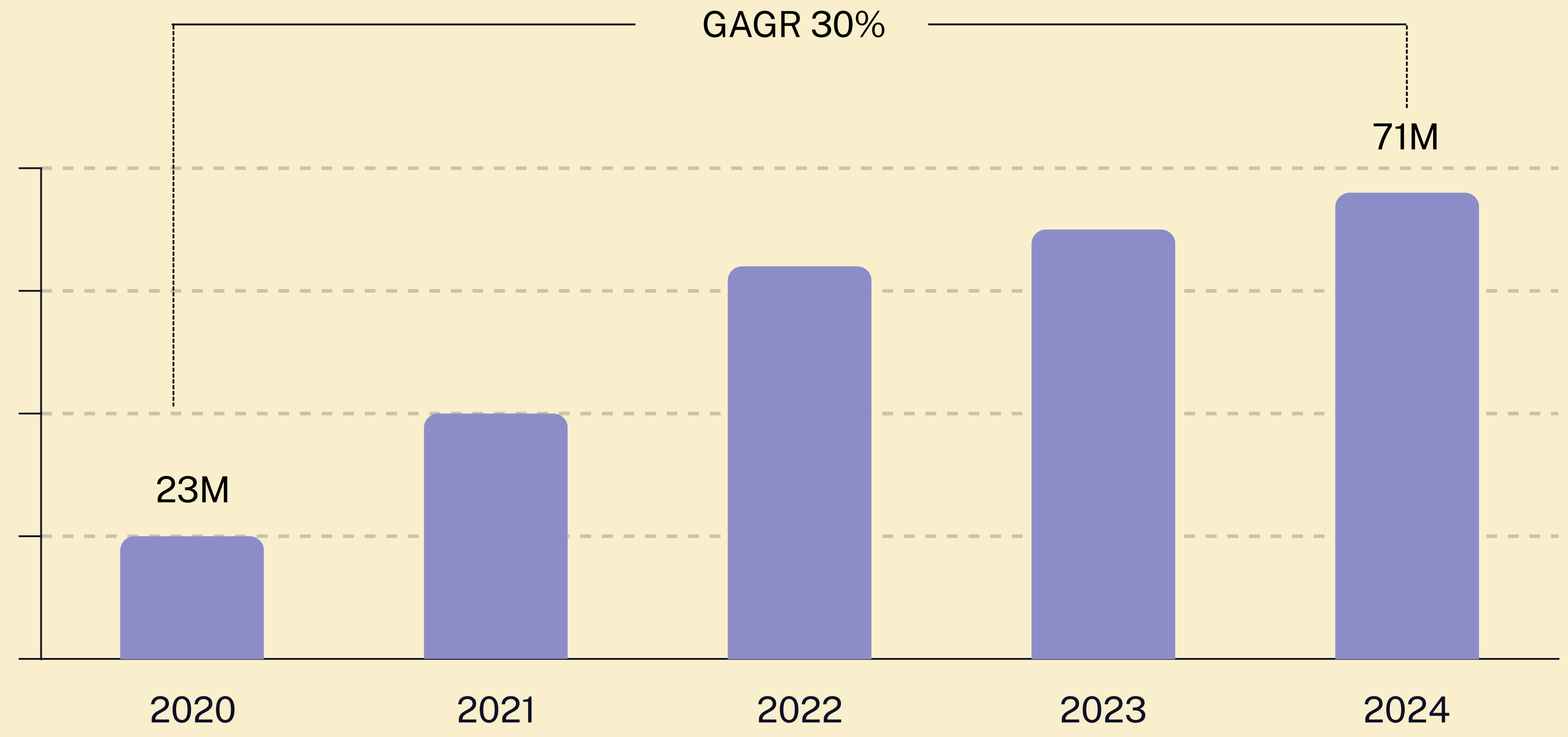
Italian cheese exports to China

**+43%**

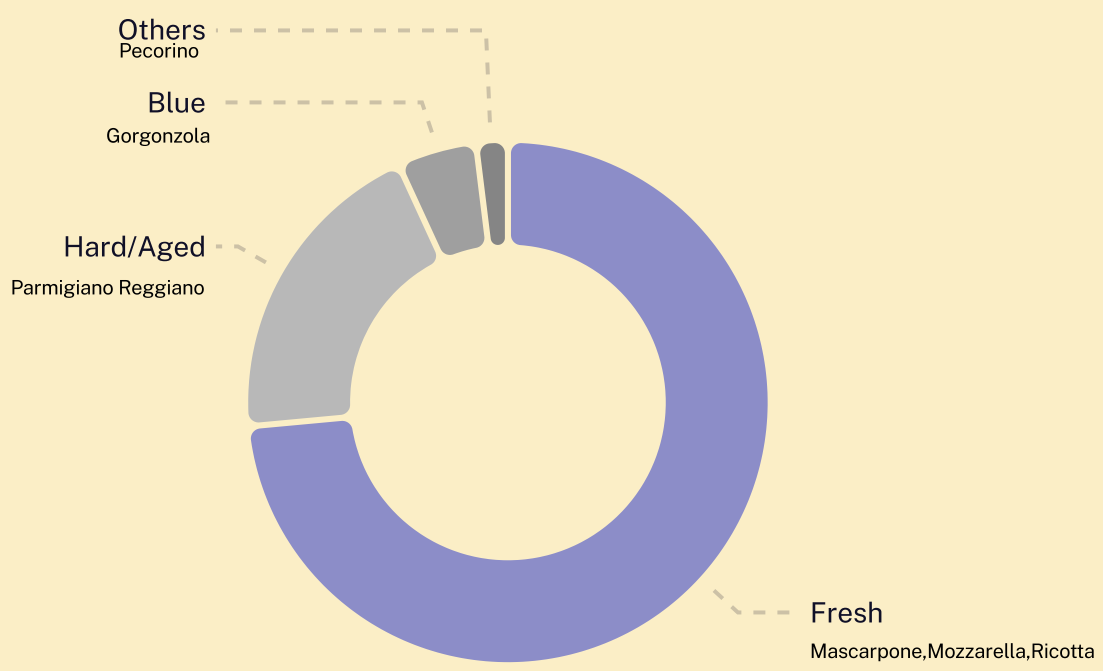
Market Shift

**Children's Snack → Daily consumption**

Italian Chese Exports to China




Breakdown of Italian Cheese Varieties in the Chinese Market



# Pastries & Chocolate: Key Drivers

Confectionery and bakery products (HS 18 and 19) represent roughly **12-15%** of the total Italian agri-food value exported to China, trailing behind Wine and Olive Oil but growing at a faster rate than alcohol. Italian pastry and biscuit exports to China are entering a phase of structural opportunity. Sweet biscuits remain the core business, but three growth drivers are emerging: healthy bakery items moving from niche to mass retail, frozen bakery technology opening supply chain partnerships, and emerging channels such as membership stores and food service gaining traction. Italian brands should move beyond traditional import models and adopt flexible formats and channel specific strategies.

## Chocolate & Cocoa Preparations

Total import value of chocolates from Italy to China in 2024

**$133 million to $141 million**

Holds the top position with a **25% market share**.

Emerging chocolate segments

**Truffle Chocolate**

Holds the top position with a **25% market share**.

Italy Ranking

**#2**

Italy is the #2 supplier of chocolate to China

Emerging chocolate segments

**#Italian Chocolate** (#意大利巧克力)

4.2m views | 17.7k notes

## Pastries, Cakes & Biscuits

China's total imports of Italian baked goods and biscuits

**$45.79 million**

Emerging pastries segments

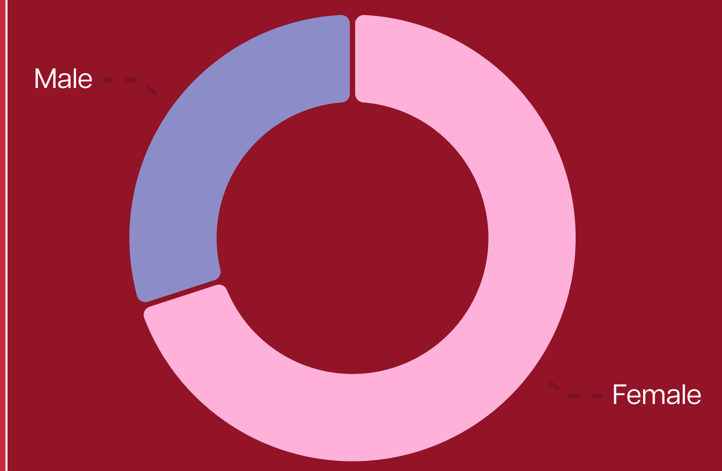
**Ciabatta**

# 4. Channel Strategy
# Emerging Pathway

# RED: From Lifestyle Inspiration to Sales Conversion

Xiaohongshu uniquely blends content seeding with e-commerce, allowing users to move seamlessly from discovery to purchase. Unlike traditional platforms that start with product search, Xiaohongshu's journey begins with lifestyle inspiration, supported by shoppable links, creator endorsements, and live streaming. This integrated funnel has made it a vital channel for Italian premium food brands seeking both brand awareness and sales conversion in China.

## User Profile




**70%**

Female Users (Ages 18-35)
Living in **Tier 1 cities**

**Keywords**

*"Mediterranean Diet", 'Clean Label', 'Italian Lifestyle"*

## E-commerce Gross Merchandise Volume

Between **2020 and 2021,** Xiaohongshu opened its e-commerce store functionality to ordinary brands and creators, and integrated content with store links, effectively creating a seamless path from discovery to purchase.

**€18 Billion**

According to Bloomberg, Xiaohongshu's total e-commerce GMV (Gross Merchandise Volume) surpassed €18 billion in 2025.

## The Ecosystem Loop

**Note Seeding** (Awareness) → **Livestream/Shop** (Conversion) → **Private Domain** (Loyalty)

## 2026 strategy for brands

### Lifestyle-driven Content

*Positioning Italian products as "approachable luxury" for everyday self-reward and wellness.*

### Niche Key Opinion Buyers

*Leveraging authentic, specialized voices rather than just mass-reach*

# WeChat: Trust Based Conversion for Premium Italian Food

The **WeChat Ecosystem**—comprising **Channels (Video Accounts)**, **WeChat Stores**, and **Private Domain Communities**—serves as the critical infrastructure for high-ticket conversions and recurring revenue for Italian food imports.

**Monthly Active Users (MAU)**

# 1.4 Billion

**E-commerce GMV**

# €75 Billion

## Core conversion loop

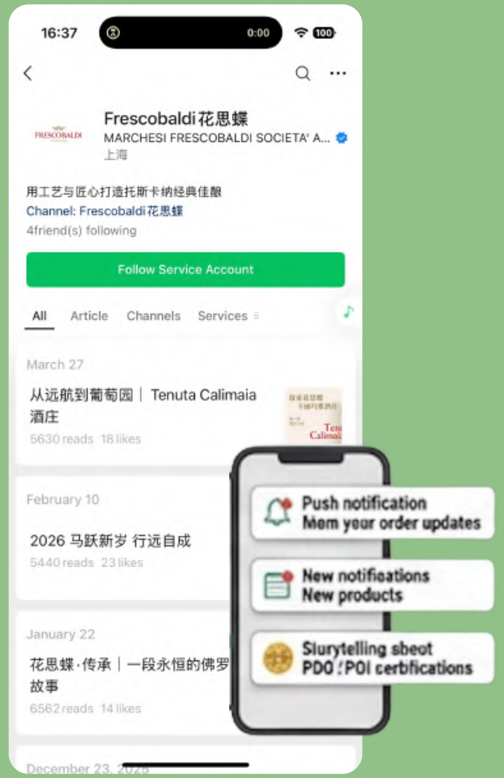
***Public Traffic Reach***

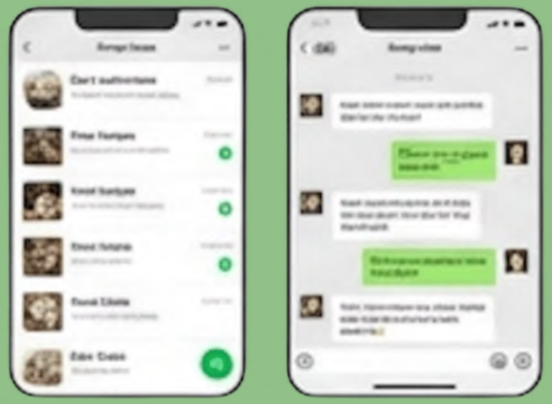

***Direct Purchase***


视频号 CHANNELS

微信小店 WECHAT STORE

## Private domain retention



公众号 SERVICE ACCOUNTS

WECHAT GROUPS

## User information management

**Offline integration**

*Scanning OR scan:in exhibition stand to claim samples and register membership via Mini Programs. Turning into digital data.*

**Digitalizing offline traffic**


小程序 MINI PROGRAMS

# Douyin: From Discovery to Purchase

Douyin has become the single most important digital channel for Western food imports to China. Unlike traditional e commerce platforms that rely on search based shopping, Douyin's algorithm driven content feeds and live stream commerce enable brands to reach consumers who may not have been actively looking for imported products.

Monthly Active Users (MAU)

**1.24 Billion**

E-commerce GMV

**€650 Billion**

Monthly Active Users (MAU)

**1**

Douyin has become the largest sales channel for Western style food in China.

Live stream + e-commerce

***Public Traffic Reach***

***Direct Purchase***

The same creator posts a product seeding video in the morning and then drives conversion through a live stream in the evening. This model shortens the "seed to convert" journey from several days to just a few hours, significantly improving ROI.

Live-streaming key roles

**Real-time Interaction**

**Product Education**

**Limited-time Purchase Incentives**

The New Sales Engine for Western Food in China

**€3.77 Billion**

Douyin has become the largest sales channel for Western style food in China.Douyin generated **€3.77 Billion** in Western pastry sales, far outpacing Tmall and JD.com.

Spring Festival Peak

**€46 Million**

During the Spring Festival season, single day sales peaked at**€46 Million**

# Thank you.

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