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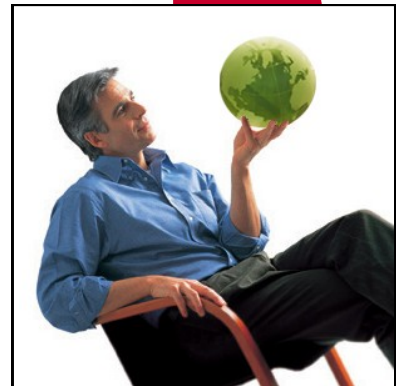
Agriculture et  
Agroalimentaire Canada

**International  
Markets  
Bureau**

**MARKET INDICATOR REPORT | JUNE 2010**



## **Consumer Trends** Wine, Beer and Spirits in China



## Consumer Trends

### Wine, Beer and Spirits in China



#### ▶ EXECUTIVE SUMMARY

Total sales of alcoholic beverages in China were US \$105.0 billion in 2009, a growth of 8.1% from 2008. On-trade\* sales of alcohol in 2009 were reported at US \$ 51.6 billion, with beer accounting for 40% of sales, wine 28%, and spirits 32%. Off-trade sales of alcoholic beverages in China were slightly larger than on-trade sales and reached US \$53.4 billion. Sales through off-trade channels were broken down as follows: beer accounted for 45%, wine 11%, spirits 43%, and other alcoholic beverages (including cider/perry and ready-to-drink/high-strength pre-mixes) 1%.

Alcoholic beverages were affected slightly by the economic downturn in late 2008 and early 2009, in terms of volume sales. Consumers and businesses reduced expenditures on entertainment, which affected on-trade sales. They also tightened their budgets at home, which affected off-trade sales. However, sales appear to have returned to normal and volume growth has been observed.

Beer is the largest and most successful sector within alcoholic beverages. Economy lagers account for 89% of beer sales, based on volume, although domestic standard lager has seen the most significant growth. As a result, manufacturers are focusing on promoting domestic standard lagers in order to increase profits.

Wine has started to become popular in China as consumers develop a sophisticated taste for alcohol. Non-sparkling (still) grape wines are increasing their presence, although the majority of sales are still, non-grape wines. Wine consumption is expected to grow as health-conscious consumers switch to wine from spirits and beer.

Local and herbal Chinese spirits, also called baijiu, are the largest sector within spirits. Imported brands are growing, but market share is still small. Off-trade sales of spirits are significantly greater than on-trade sales, as spirits in on-trade establishments are expensive.

Alcohol consumption per capita in China is currently low compared to Western standards, as it is still only popular in urban centres. However, with increasing urbanization and with time, consumption is expected to increase, as is expenditure on alcoholic beverages. This will open the door for increased sales of both domestic and imported products. There is incredible growth forecast in alcoholic beverages in China and multinational producers will have to be competitive in order to succeed within this domestically dominated market.

\*On-trade = alcoholic beverages sold in restaurants, bars etc.  
Off-trade = alcoholic beverages sold in retail stores

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## ▶ CONSUMER TRENDS

- ▶ In general, Chinese families have a conservative attitude towards alcohol consumption and, although there is no official minimum drinking age, alcohol is not served to those under 18.
- ▶ Alcohol consumption varies regionally and is more popular in the colder climate of Northern China, which has previously seen greater alcohol consumption than the Southern region. However, as China changes to become more modern, the difference between regions is expected to narrow.
- ▶ Health and wellness is becoming increasingly important to Chinese consumers. Consumption of grape-wine and low-alcohol beer has grown, while spirits consumption has decreased, as consumers look for healthier alcoholic beverages to enjoy. Manufacturers have even launched new products that are health focused, including Gold Jiu and Han Fang Nuan Pi.
- ▶ Declining unemployment rates in 2009 helped to increase consumer confidence and demand for alcoholic beverages in both on-trade and off-trade channels. Furthermore, China's economy is expected to continue to grow from 2009-2014.
- ▶ Demand is growing for premium products as consumers develop a preference for better-tasting, healthier alcoholic drinks. As a result, standard lager brands are becoming more popular and economy brands are less favourable. In terms of spirits, rare cognacs, whiskies and imported scotches are becoming trendy, as consumers follow the trend toward high-end products.
- ▶ Although demand is growing for premium products, this has mainly been limited to large metropolitan areas. There is still demand for economy and domestic products throughout China, and growth for domestic products is still observed in the rural and interior areas of China.
- ▶ Young consumers, particularly educated, middle-class men, are leading growth in the market and trends are appearing quickly as brands become increasingly important to this fashion-conscious demographic. The number of female drinkers is also increasing dramatically, as female Chinese drinkers were virtually non-existent in the past.
- ▶ Contributing to growth in alcohol consumption is the increasing number of bars, restaurants and clubs in China. Going out with friends and colleagues for entertainment has become a part of China's urban culture, influenced by the West, and this practice is gradually spreading throughout the country.



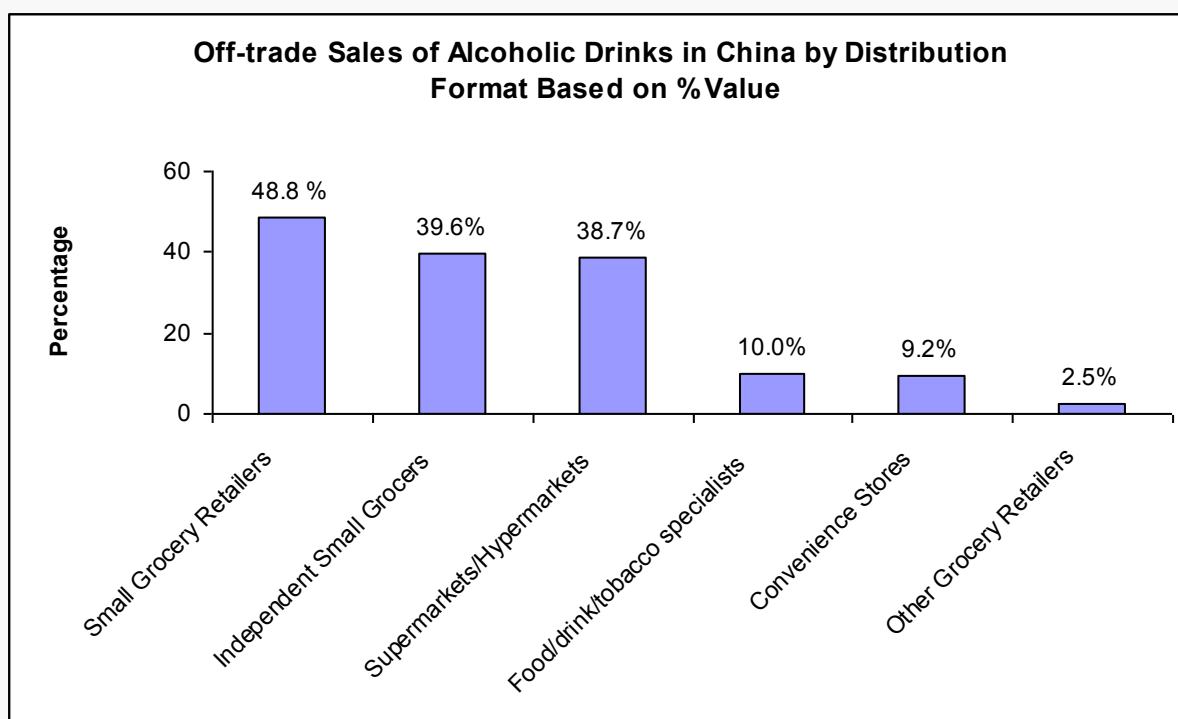
## ▶ RETAIL TRENDS

- ▶ Small grocery stores are the leading retailers of off-trade alcoholic beverages based on sales value. These stores are conveniently located close to residential neighbourhoods, which has been the main reason for their success. However, supermarket sales are increasing as they become more popular and as car ownership increases, thereby making supermarkets more accessible.
- ▶ On-trade sales of alcohol include sales that are made through the following establishments: full-service restaurants, fast food stores, street stalls/kiosks, cafes/bars, and 100% home delivery/take-away. Off-trade sales occur through the following distribution channels: supermarkets, hypermarkets, small grocery retailers, convenience stores, independent small grocers, and food/drink/tobacco specialists.
- ▶ Specialty retailers are the main means of distribution for mid to high-end spirits and wine in China. These independently owned stores are able to offer a wide range of high-end brands and staff are generally knowledgeable about the products.
- ▶ To compete with specialty stores, supermarkets are trying to offer a more exclusive experience with more high-end brands in designated stores and sections.



## ▶ RETAIL TRENDS (CONTINUED)

- ▶ The packaging of alcoholic beverages has grown in importance, as packaging helps to distinguish a product in an otherwise generic market. Coolerpacks made with Polyethylene Terephthalate (PET) bottles with twist off plastic bottle caps were recently introduced into the beer market. Although PET packaging is not common in the alcoholic beverages market, it has proven to have appeal due to its shatterproof nature and twist-off cap. Although it will not rival glass and tin, PET packaging will continue to increase its presence in the alcoholic beverages market by continuing to appeal to fashion-conscious young consumers.



Source: Euromonitor, 2010.

## ▶ REGIONAL VARIANCES

### Eastern China

Consumers in Shanghai are increasingly preferring light beers with lower alcohol content. This is caused mainly by recent health awareness trends, especially among females. The market for rice wine is currently the highest in Eastern China, but it is lacking popularity among young consumers, and demand for this product is expected to decline in the coming years. When it comes to grape wine, consumers in Shanghai are becoming more sophisticated in their choices, and more high quality imported wines are being introduced to the market. Although rising consumer awareness of the dangers of over-consumption of spirits will result in a decline in sales in Eastern China, traditional spirit drinking provinces, including Shandong and Anhui, will continue to see a high demand.



▶ REGIONAL VARIANCES (CONTINUED)

**Southwestern China**

Spirits are very popular in Southwestern China, as many of the large domestic producers are situated in the region, including Sichuan Jian Nan Chun (Group), Sichuan Yibin Wuliangye Distillery, and Sichuan Tuopai Yeast Liquor. Southwestern consumers are price-sensitive, however, demand is increasing for more sophisticated products. Wuliangye led sales of alcoholic beverages in China in 2009 by focusing on medium-end wine brands, which proved to be in high demand in the region. Demand for domestic products in the region is declining as international brands become more popular. In particular, whiskey consumption has increased with the introduction of Jack Daniel’s and Johnnie Walker.

**Southern China**

In addition to being affected by the financial crisis, beer sales in Southern China were also affected by bankruptcies in the populous region of Guangdong, which forced migrant workers to leave the area in search of work. There is a general preference towards lower-alcohol products, like beer and wine, in this region. Prices of beer brands remain stable in the south, although some brands have tried to increase sales by offering “buy-3-get-1-free” promotions.

**Northwestern China**

With its colder climate, most consumers in the Northwestern region of China prefer to consume spirits. That being said, demand is growing for grape and rice wine for those consumers concerned about their health and well-being. Tsingtao Brewery’s brand Hans, which is produced in the region, led volume sales of alcoholic beverages, as it was preferred by consumers for its heavier taste. Competition was high between domestic and imported products in 2009. The imported brand Budweiser led sales within on-trade mediums, but the domestic Hans brand continued to lead overall beer sales in the region. In 2009, rising transportation costs drove up the price of alcohol in the Northwestern region of China.

**Northern and Northeastern China**

Like other regions in China, Northern and Northeastern China has also experienced an increase in sales of grape wine, non-grape wine and low-alcohol beer, in response to the growing health trend. Some of the preferred low-alcohol brands include, Tsingtao, Blue Ribbon and Carlsberg. In addition, particularly in Beijing, interest is growing in Chinese Herbal Spirits, which are said to have various health benefits. The number of imported brands available in off-trade facilities has increased in the region, as specialty retail stores have brought the product to their consumers. Yanjing is the leading brand in the region and its popularity was further boosted by its prominent advertising during the 2008 Olympic Games in Beijing. Foreign producers of spirits have increased their focus on the Chinese market, particularly in Beijing, which is helping to generate healthy competition.

**Central China**

Sales of alcohol increased at a constant rate in 2009 in the Central region. International brands also grew as Western-style bars, karaoke, and nightclubs have become more popular and thereby increased demand. However, the market in Central China is still dominated by local brands and consumers in the region remain loyal to these brands. Chinese spirits led alcohol sales in mid-China in 2009.

**Table 16 Sales of Alcoholic Drinks by Region: Total Volume 2004-2009**

Regions	2004	2005	2006	2007	2008	2009
Northern and Northeastern China	9,504.10	10,287.50	11,559.50	12,836.60	13,611.40	14,479.40
Eastern China	9,103.40	10,016.10	11,256.10	12,541.60	13,307.20	14,152.90
Central China	5,336.50	5,859.90	6,557.50	7,295.90	7,637.90	8,017.80
Southern China	4,645.60	5,098.60	5,733.20	6,419.60	6,772.70	7,163.40
Southwestern China	2,662.30	2,833.20	3,076.90	3,340.10	3,475.00	3,624.80
Northwestern China	1,853.30	1,985.00	2,196.10	2,381.40	2,466.70	2,562.50
TOTAL	33,105.20	36,080.30	40,379.30	44,815.10	47,270.80	50,000.60

Source: Euromonitor, 2010.

## ▶ BEER



- ▶ In 2009, off-trade sales of beer in China totaled US \$24.1 billion, an increase of 6.6% from 2008.
- ▶ The financial crisis negatively affected beer sales in China during late 2008 and early 2009. Furthermore, the economic crisis influenced an increase in the number of mergers and acquisitions, as larger companies bought out struggling firms hit hard by the downturn in the economy; for example, Chinese Resources Enterprise purchased Hupo beer in late 2008, enabled by Hupo's declining stock market valuation.
- ▶ A growing demand for low-alcohol beer has arisen from the increasing number of female and health and wellness oriented consumers, while demand for dark beer and stout has continued to be minimal.
- ▶ Based on volume in 2009, the majority of beer sales, 68%, were made off-trade; however, on-trade sales are increasing, as socializing in restaurants, pubs and bars grows in popularity.
- ▶ In general, glass bottle brands in China are cheaper than cans due to reduced packaging costs and are therefore more popular. Canned brands are increasing in popularity due to their shatterproof appeal and trendy status amongst younger, fashion-conscious consumers.
- ▶ Domestic beers continue to dominate the Chinese market, overshadowing imports of foreign products.
- ▶ China Resources Enterprise, whose major brand is Snow, and Tsingtao Brewery, whose major brand is Tsingtao, are the two largest manufacturers in China. The top six domestic manufacturers account for 52.6% of total volume sales in China, however, multinational brands like Carlsberg and Heineken are slowly increasing their presence.
- ▶ Consumer preferences in China vary regionally although the majority prefer lighter tasting beers like Carlsberg Chill and Tsingtao Huandong.
- ▶ Off-trade sales are forecast to grow by 60% between 2009 and 2014. More importantly, China is forecast to account for 57% of the global absolute volume growth and 40% of the global absolute value growth, which highlights the importance and size of this relatively new market.

Off-trade and On-trade Sales of Beer in China by Subsector in Millions of Litres						
	2004	2005	2006	2007	2008	2009
Lager	27579.0	30411.6	34562.3	38603.3	40633.9	42958.7
Premium Lager	491.5	608.4	719.7	843.4	912.4	980.5
Imported Premium Lager	36.3	22.7	20.9	21.2	27.7	28.7
Domestic Premium Lager	455.2	585.7	698.8	822.2	884.7	951.9
Standard Lager	1,893.9	2,170.8	2,578.2	3,017.4	3,290.3	3,592.0
Imported Standard Lager	-	-	-	-	-	-
Domestic Standard Lager	1,893.9	2,170.8	2,578.2	3,017.4	3,290.3	3,592.0
Economy Lager	25,193.7	27,632.3	31,264.4	34,742.5	36,431.2	38,386.2
Imported Economy Lager	-	-	-	-	-	-
Domestic Economy Lager	25,193.7	27,632.3	31,264.4	34,742.5	36,431.2	38,386.2
Imported Lager	36.3	22.7	20.9	21.2	27.7	28.7
Domestic Lager	27,542.7	30,388.9	34,541.4	38,582.0	40,606.2	42,930.0
Dark Beer	-	-	-	-	-	-
Stout	-	-	-	-	-	-
Low/Non- Alcohol Beer	19.8	26.0	32.3	37.0	39.9	43.1
Low Alcohol Beer	19.8	26.0	32.3	37.0	39.9	43.1
Non-Alcoholic Beer	-	-	-	-	-	-
<b>Beer</b>	<b>27,598.8</b>	<b>30,437.5</b>	<b>34,594.6</b>	<b>38,640.3</b>	<b>40,673.8</b>	<b>43,001.8</b>

Source: Euromonitor, 2010.



## ▶ WINE

- ▶ Off-trade sales of wine grew to US \$6.1 billion in 2009, a 12.7% increase from 2008.
- ▶ The growing demand for wine has been fuelled by a stronger awareness of the presence of wine in the Chinese market and an increasingly sophisticated consumer base.
- ▶ The majority of wine brands in China are targeted toward price-insensitive, high-income consumers. Domestic manufacturers are expected to focus on producing medium to high-end brands.
- ▶ Demand for traditional rice wines are limited to an aging male population in China. Although rice wine has found success outside of the Eastern China region, in cities like Beijing, particularly in foodservice channels.
- ▶ The most popular red wine in China is Cabernet Sauvignon, while the most popular white is Chardonnay. In the rosé grape wine category, Zinfandel is the most popular in China.
- ▶ The wine industry is currently in the process of developing self-regulating guidelines, as there are currently no official grape wine classification guidelines.
- ▶ In terms of foreign products, Chilean wines have been very popular due to their light taste and low prices.
- ▶ COFCO Wines and Spirits Co., Yantai Changyu Pioneer Wine Co Ltd, and Yantai Weilong Grape Wine Co Ltd are the largest brand owners in the Chinese market, with their main brands being Great Wall, Changyu, and Weilong, respectively.
- ▶ The wine sector anticipates growth during the 2009-2014 period, as consumers switch to wine from spirits over health concerns and acquire a taste for grape wines.



Off-trade and On-trade Sales of Wine in China by Subsector in Millions of Litres						
	2004	2005	2006	2007	2008	2009
Still Light Grape Wine	489.7	547.1	609.6	789.1	967.5	1131
Still Red Wine	314.8	360.3	409.7	552.0	692.1	821.4
Still White Wine	131.7	141.6	152.8	188.1	224.8	257.2
Still Rosé Wine	43.2	45.2	47.1	48.9	50.6	52.3
Sparkling Wine	0.9	0.9	1.1	1.3	1.6	1.9
Champagne	0.3	0.3	0.4	0.6	0.9	1.1
Other Sparkling Wine	0.6	0.6	0.6	0.7	0.7	0.8
Fortified Wine and Vermouth	-	-	-	-	-	-
Non-Grape Wine	1,391.1	1,466.9	1,556.7	1,662.8	1,781.9	1,891.2
Rice Wine below RMB*10/Litre	479.1	498.7	517.9	536.1	552.7	568.6
Rice Wine from RMB11-50/Litre	581.2	618.5	664.3	721.7	789.0	854.9
Rice Wine from RMB51-100/Litre	254.3	268.9	288.5	312.3	339.7	361.8
Rice Wine over RMB100+/Litre	76.4	80.9	86.0	92.7	100.4	105.9
<b>Wine</b>	<b>1,881.7</b>	<b>2,015.0</b>	<b>2,167.4</b>	<b>2,453.1</b>	<b>2,751.0</b>	<b>3,024.0</b>

\*RMB= Renminbi or Chinese Yuan (CNY)

Source: Euromonitor, 2010.



## ▶ SPIRITS

- ▶ Off-trade sales of spirits grew to US \$23.2 billion in 2009, up from US \$21.7 billion in 2008.
- ▶ Based on volume, off-trade sales make up 80% of spirit sales in China; the volume of on-trade spirits decreased from 2008 to 2009, as expenditures on entertainment were reduced during hard economic times.
- ▶ Other spirits, which include traditional Chinese Spirits known as Baijiu, accounted for 98% of volume sales in 2009, and just over 84% of sales. Whiskey sales contributed to 6% of spirit sales, and brandy and cognac accounted for 9%. Vodka, gin, rum, tequila, and liqueurs combined to account for the remaining 1% of sales.
- ▶ Latin-inspired tequila-based drinks are growing in popularity in China. This trend has developed from the growing interest in Latin culture in Shanghai and other metropolitan centres.
- ▶ Flavoured vodka in flavours such as citrus, peach, cherry and apple, accounted for 39% of vodka volume sales in 2009. However, vodka is not a very popular drink overall as it is similar tasting to local spirits (Baijiu), which are preferred. As a result, consumers are more likely to choose whiskey or cognac when looking for a change from local spirits.
- ▶ Rum had the strongest growth within spirits in both volume and value. Young women have acquired a taste for rum mixed with soft drinks as the drink of choice in clubs or bars. A large part of this trend was due to promotional activities at bars and clubs offering a free drink upon entry and buy-one-get-one-free offers featuring rum.
- ▶ Chinese producers are confident that baijiu brands will continue to dominate spirit sales in China. Baijiu brands will remain popular with older consumers as they are uniquely tailored to the Chinese culture, however imported brands like Bacardi, Absolut and Chivas are becoming more popular among younger consumers.
- ▶ Spirit sales may decline in the next five years as consumers switch to healthier alcoholic beverages like wine and light beer.
- ▶ Whiskey sales are forecast to grow the most in the next five years due to increased marketing, which will help raise demand for whiskey outside of the largest metropolitan cities.

Off-trade and On-trade Sales of Spirits in China by Subsector in Millions of Litres						
	2004	2005	2006	2007	2008	2009
Whiskey	7.6	13.2	16.9	20.4	21.2	22.6
Single Malt Scotch Whiskey	0.1	0.2	0.2	0.3	0.3	0.4
Blended Scotch Whiskey	6.3	11.6	14.9	18.0	18.4	19.5
Bourbon/Other US Whiskey	0.8	1.0	1.3	1.6	2.0	2.3
Canadian Whiskey	0.4	0.5	0.5	0.5	0.5	0.5
Brandy and Cognac	38.2	41.3	44.2	46.9	49.8	52.4
Brandy	31.4	32.5	33.5	34.5	35.5	36.5
Cognac	6.8	8.8	10.7	12.4	14.3	15.9
White Spirits	1.6	2.1	2.8	2.6	2.5	2.6
Gin	0.3	0.3	0.4	0.4	0.5	0.5
Vodka	1.3	1.8	2.4	2.1	2.0	2.0
Rum	0.2	0.2	0.2	0.5	0.6	0.7
Tequila (and Mezcal)	0.1	0.1	0.1	0.2	0.2	0.2
Liqueurs	0.6	0.7	0.8	0.8	0.9	0.9
Other Spirits	3,575.6	3,569.2	3,551.4	3,649.3	3,769.6	3,894.2
Chinese Herbal Spirits	43.0	54.5	66.8	79.5	92.4	103.0
Economy Local Spirits	1,704.2	1,641.1	1,565.4	1,584.1	1,612.9	1,636.6
Lower Mid-Range Local Spirits	1,101.6	1,115.6	1,126.2	1,152.5	1,186.7	1,227.0
Premium Local Spirits	167.0	178.0	191.0	206.2	222.0	238.7
Upper Mid-Range Local Spirits	559.7	580.0	601.9	627.0	655.6	689.0
<b>Spirits</b>	<b>3,623.9</b>	<b>3,626.9</b>	<b>3,616.3</b>	<b>3,720.6</b>	<b>3,844.8</b>	<b>3,973.6</b>

Source: Euromonitor, 2010.





▶ CHINESE BRANDS

Brand Shares of Beer in China 2006-2009 (% Total Volume)					
	Company	2006	2007	2008	2009
Snow	China Resources Enterprise Co Ltd	8.8	13.3	15	17
Tsingtao	Tsingtao Brewery Co Ltd	4.5	4.8	5.8	6.1
Yanjing	Beijing Yanjing Brewery Co Ltd	4.5	4.6	4.9	5.2
Harbin (Anheuser-Busch InBev NV)	Harbin Brewery Group Ltd	-	-	4.5	4.7
Zhujiang	Guangzhou Zhujiang Brewery Co Ltd	3.8	3.5	3	2.9
Hans	Tsingtao Brewery Co Ltd	1.7	2	2.6	2.8
Jinxing	Henan Jinxing Brewery Group	2.9	2.8	2.7	2.7
Liquan	Beijing Yanjing Brewery Co Ltd	1.6	1.9	2.2	2.6
Sedrin (Anheuser-Busch InBev NV)	Inbev Sedrin Brewery Co Ltd	-	-	3.1	2.6
Laoshan	Tsingtao Brewery Co Ltd	1.5	1.7	2.2	2.4
Harbin (Anheuser-Busch Cos Inc)	Harbin Brewery Group Ltd	4.4	4.5	-	-
Sedrin (InBev)	Inbev Sedrin Brewery Co Ltd	2.9	3.2	-	-
Others		63.4	57.7	53.9	51.1
Total		100	100	100	100

Brand Shares of Spirits in China 2006-2009 (% Total Volume)					
	Company	2006	2007	2008	2009
Luzhou Lao Jiao Da Qu	Luzhou Lao Jiao Co Ltd	1.1	1.3	1.6	1.7
Red Star Er Guo Tou	Beijing Red Star Co Ltd	1.1	1.1	1.2	1.2
Jian Nan Chun	Sichuan Jian Nan Chun (Group) Co Ltd	1	1	1	1.2
Tuo Pai	Sichuan Tuopai Yeast Liquor Co Ltd	1.1	1	1.1	1.1
Changyu	Yantai Changyu Group Co Ltd	0.9	0.9	0.8	0.8
Jiujiang Shuang Zheng	Guangdong Jiujiang Distillery Co Ltd	0.7	0.7	0.7	0.6
Jing Jiu	Jing Brand Co Ltd	0.4	0.5	0.6	0.6
Lang Jiu	Lang Jiu Group	0.3	0.4	0.6	0.6
Kweichow Moutai	Kweichow Moutai Co Ltd	0.4	0.4	0.5	0.5
Wu Liang Chun	Sichuan Yibin Wuliangye Distillery Co Ltd	1.6	0.8	0.6	0.5
Others		91.5	91.8	91.3	91.1
Total		100	100	100	100

Brand Shares of Still, Light, Grape Wine in china 2006-2009 (% Total Volume)					
	Company	2006	2007	2008	2009
Great Wall	COFCO Wines & Spirits Co	14.1	11.9	10.8	10.6
Changyu	Yantai Changyu Pioneer Wine Co Ltd	8.3	8.4	8.8	8.8
Weilong	Yantai Weilong Grape Wine Co Ltd	5.9	4.8	4.7	4.6
Dynasty	Dynasty Winery Co Ltd	6.1	4.6	4.3	4
Suntime	Vinisuntime International Co Ltd	3.1	3.1	3.2	3.3
Shangri-la (Vats Group)	Yunnan Shangri-La Winery Co Ltd	1.5	1.4	1.1	1.3
Tonghua (Macrolink Group)	Tonghua Grape Wine Co Ltd	0.6	0.5	0.4	0.4
Dragon Seal	Beijing Dragon Seal Wine Co	0.5	0.4	0.4	0.4
Yunnan Red	Yunnan Red Winery Group Co Ltd	0.3	0.3	0.4	0.4
Vieux Papes	Castel Groupe	0.1	0.1	0.3	0.3
Roche Mazet	Castel Groupe	0.1	0.1	0.2	0.2
Others		59.3	64.3	65.6	65.7
Total		100	100	100	100

Source: Euromonitor, 2010.

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

**Wine, Beer and Spirits in China**

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