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China’s baijiu retail sales fell 8.2% at large monitored retailers through August

The state-backed report suggested lower-priced baijiu outperformed premium products within the tracked retail sample

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Retail sales of baijiu at large monitored retailers in China fell 8.2% in the first eight months of 2026 from a year earlier, according to a report published Tuesday, November 10, by the China National Commercial Information Center, a state-backed commercial data institute.

The report said the cumulative retail sales value of all alcoholic beverages tracked in the same sample fell 2.1% from January through August, while baijiu, the Chinese grain spirit that dominates the country’s domestic spirits market, posted a steeper decline. The center did not publish the sales value in yuan or the volume sold, so the data does not show the absolute size of the drop.

The China National Commercial Information Center, founded in 1984, runs a statistical tracking system for commercial enterprises approved by the national statistics authority. Its figures are based on monitored major retail companies rather than a census of all sales across China, which means the results point to conditions at large surveyed retailers and should not be read as a full measure of the national market.

The report added that China’s baijiu production continued to weaken. Citing National Bureau of Statistics data, it said cumulative output in January through August reached 2.079 million kiloliters, calculated on a 65-degree product-equivalent basis, down 3.8% from a year earlier. It also said output has shown a year-by-year decline in the first eight months of each year from 2021 through 2026.

For August alone, the report said retail sales of both alcoholic beverages and baijiu fell from the same month a year earlier. It attributed part of that decline to a high comparison base in August 2025. At the same time, it said the pace of decline narrowed from July.

Brand concentration improved from July but remained below the level of a year earlier. In August, the combined market-occupancy indicator for the top 10 baijiu brands at the country’s key large retail enterprises stood at 53.41%, the report said. That was down 2.00 percentage points from August 2025 but up 1.89 percentage points from July. Based on those changes, the implied levels were 55.41% a year earlier and 51.52% in July.

The top 10 brands in the August ranking were Moutai, Wuliangye, Jiannanchun, Fenjiu, Yanghe, Luzhou Laojiao, Xifeng, Hongxing, Gujing Gong and Niulanshan, according to the report. The center did not break that combined indicator into separate value or volume shares for each brand, and it did not publish detailed sales figures behind the ranking.

The report also pointed to a shift inside the category by price segment. It said brands in the 100 yuan to 200 yuan retail price range gained 2.71 percentage points in the market-occupancy indicator from a year earlier. By contrast, brands in the 200 yuan to 500 yuan range fell 1.48 percentage points, and brands priced above 500 yuan fell 2.04 percentage points. That suggests relatively stronger demand in mass-market baijiu than in midpriced and premium products within the tracked retail sample.

The center said baijiu companies continued to push a younger-consumer strategy in 2026 as they looked for ways to fit the category more closely into everyday consumption. It pointed to product development aimed at lower alcohol content and smaller formats, including ultra-low-alcohol offerings in the 22-degree to 29-degree range and a jointly launched 50-milliliter mini-bottle product by leading brands. It also said producers were expanding into instant retail, new retail platforms and offline experience settings to target occasions such as small social gatherings and at-home drinking.

On marketing, the report said some brands were leaning more heavily on hobby-based communities and interactive campaigns. It cited Wuliangye’s co-branded products tied to the 2026 FIFA World Cup in the United States, Canada and Mexico, as well as promotions using blind-box style packaging, as examples of efforts to connect baijiu with sports, collectibles and younger consumers.

The data leaves several questions unanswered. Because the report only provides percentage changes and ranking indicators, it does not show how much of the retail decline came from lower sales volumes, lower prices or changes in product mix. It also does not allow a calculation of the amount of retail spending lost in yuan between January and August. Still, the figures add to evidence of softer demand in a major Chinese consumer category and show that, within the tracked retailers, lower-priced baijiu held up better than higher-priced products through August.