

EXPORT STRATEGY · 2026

The Path of Niche Wines to China

Bulgaria — 6,000 years of winemaking — in a market shrinking in volume and growing in value

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29 September 2026 · Sofia

Photo: Ann Wuyts, Wikimedia Commons — CC BY 2.0



THE MARKET TODAY

From boom to contraction

2017



751M litres

≈ \$2.39 bn imported

2025



207M litres

≈ €1.25 bn imported

Volumes fell by more than 70% in eight years. China's share of world wine imports by value dropped from 8% (2017) to under 3% (2023).

Source: Chinese customs data, analysed by OIVE (March 2026); winesinfo.com

THE MARKET TODAY

Fewer litres, pricier bottles

−26.7%

import volume in 2025 versus 2024

€6.07

average price per litre in 2025, up 16.5% in a year

+0.8%

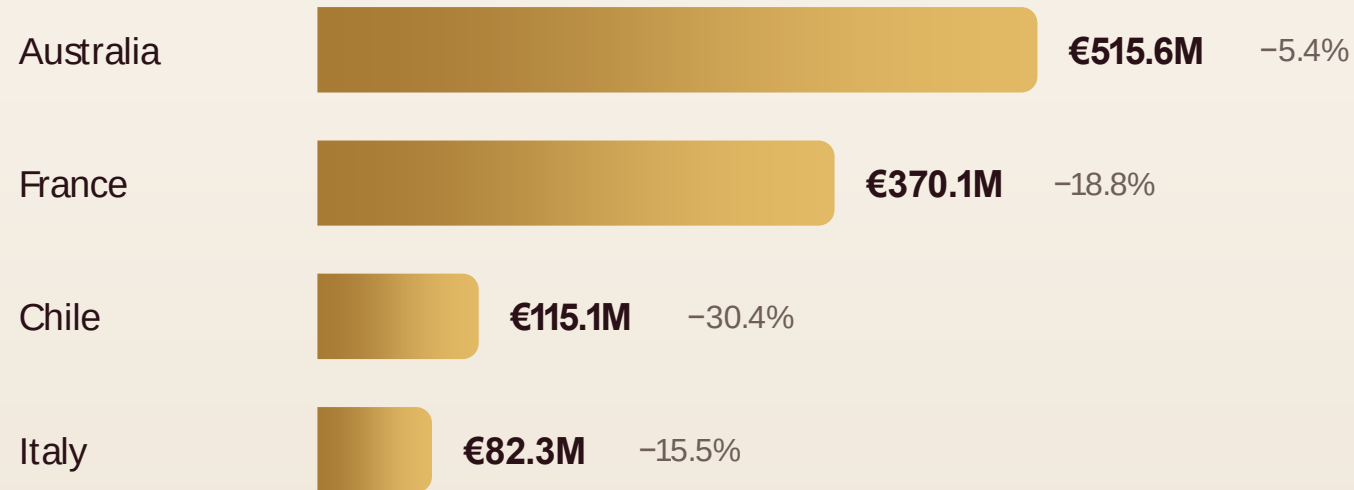
import value in H1 2026 (\$710M) — first growth after years of decline, with volume still −11%

The middle is shrinking: buyers choose either affordable wine or premium for gifting and business. **That is exactly where the niche lives.**

Sources: OIVE (2026); Vino Joy News (July 2026); BestWineImporters (2025)

THE MARKET TODAY

Who supplies China's wine (2025)



THE ONLY TWO GROWING

New Zealand

+25% value · +58.5% volume

Georgia

+3% value · +15.9% volume

Small countries with a clear identity.

Source: Chinese customs data, analysed by OIVE (March 2026). Australia regained first place after tariffs were lifted in March 2024.

THE MARKET TODAY

Georgia grows — but not our way

LANDED VALUE · 2025

≈ €3

per litre — 2.95M litres for \$9.89M, China's ninth-largest supplier

- Zero duty under the China–Georgia free trade agreement
- Semi-sweet, RMB 50–100 a bottle, sold through Douyin livestreams and wide retail
- Volume up 15.9% in 2025 and up 46.7% in early 2026 — on price and reach
- Qvevri and native grapes are the story at home, not what sells there

Georgia won by being cheap and easy to buy. Both routes are closed to us — so ours has to be the opposite.

Sources: Chinese customs data via Vino Joy News (April 2026); China–Georgia FTA, in force since 2018

THE RULES AT THE BORDER

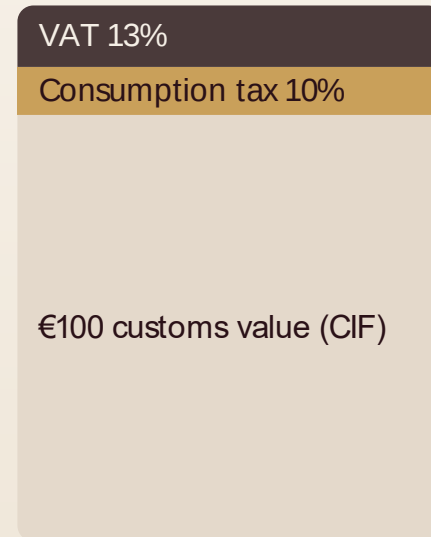
The border price: the EU pays duty, competitors don't

≈ €143



EU bottled wine

≈ €126



Australia · Chile · NZ ·
Georgia

Free-trade agreements give our competitors 0% duty. The same excise and VAT apply to everyone.

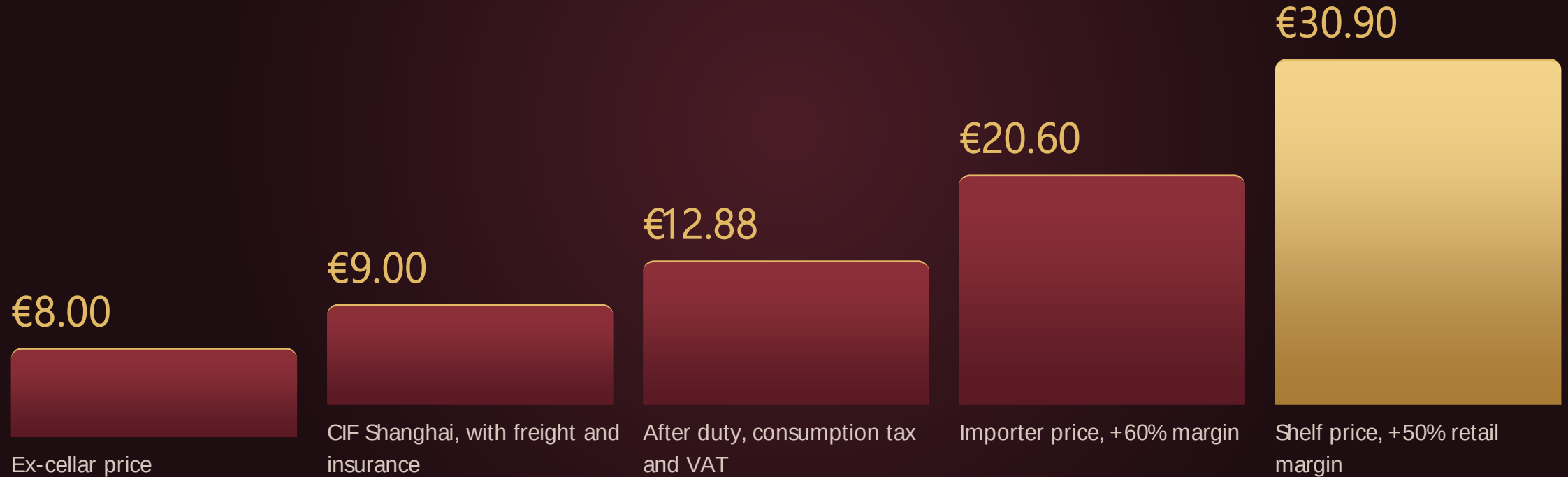
We cannot win on price. We can win on uniqueness.

THE PRICE LADDER

One bottle's journey to a Shanghai shelf

$\approx 3.9\times$

the ex-cellar price, on the shelf



Illustrative example: ex-cellar price, freight and margins are assumptions — replace them with real quotes.

What the new Chinese consumer wants



Whites and sparkling

Sparkling was the only major category to grow in both volume and value in H1 2026; whites from New Zealand and Germany grew for a third year.



Lighter, fresher styles

Younger buyers are moving away from heavy, tannic reds.



Premium and gifting

The middle shrinks; wine is bought for gifts, business occasions and collections.



Discovery online

Douyin and RED for discovery, Tmall and JD for purchase, WeChat for loyalty and gifting.

The risks we must see clearly



Full warehouses

Importers are still clearing old stock; EU bottled wine imports fell 16.6% by volume in H1 2026.



Price pressure

According to traders, some high-end French wines now sell for less in China than in France.



Political sensitivity

Tariffs of up to 200% on Australian wine (2021–2024) showed how fast the rules can change.



Payments and trademark

Prepayment or letter of credit; register the trademark in China before the first shipment.



THE POSITION OF THE NICHE

In China, niche wine sells through
origin, personality and story.



THE ORIGIN

Bulgaria, land of the Thracians

6,000

years of winemaking on Bulgarian land

Land of Orpheus and Dionysus

Wine sat at the heart of Thracian ritual and myth.

Gold made for wine

Rhytons and phialae of the Thracian treasures were made to pour and share wine.

A living tradition

Mavrud, Rubin, Melnik, Pamid, Dimyat, Misket — grapes that grow only here.

THRACIAN GOLD

The Panagyurishte Treasure



9

gold vessels

6+ kg

of pure gold

4th–3rd c. BC

Thracian craftsmanship

Rhytons, a phiale and an amphora-rhyton — vessels for pouring and sharing wine.

THRACIAN GOLD

More treasures from the land of wine



Varna gold

The oldest worked gold in the world, c. 4600–4200 BC.



Rogozen Treasure

165 silver vessels, many of them gilded — 5th–4th century BC.



Kazanlak Tomb

4th-century BC frescoes of a funeral feast; a UNESCO World Heritage Site.

Gold, wine and ritual: a visual language Chinese audiences read instantly.

The advantages of Bulgarian wine



Grapes found nowhere else

Mavrud, Rubin, Melnik, Pamid — flavours with no familiar comparison.



A discovery for the buyer

For most Chinese buyers Bulgaria is a new wine country — the novelty younger drinkers seek.



Small batches

Limited, numbered bottles — a natural argument for gifting and collecting.



The winemaker as ambassador

Personal presence, tastings and long-term relationships (guanxi) outweigh advertising.

AT THE TABLE

Bulgarian wine meets Chinese cuisine

CANTONESE

Steamed fish, dim sum, seafood



Dimyat · Misket
· Sparkling

SICHUAN · HUNAN

Chilli, spice, numbing pepper



Off-dry Misket ·
Pamid rosé

BEIJING

Peking duck, rich roasts



Mavrud

SHANGHAI

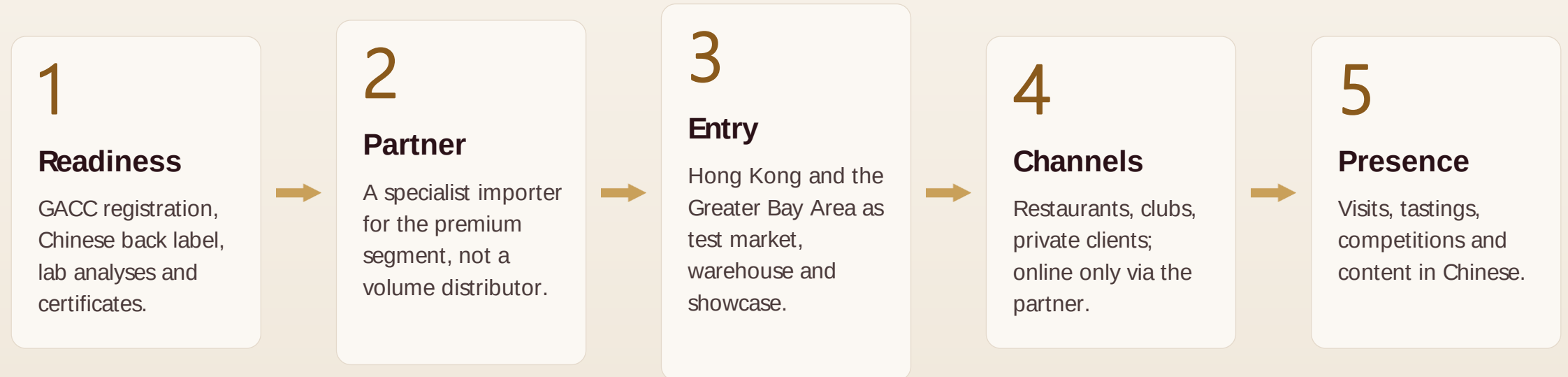
Red-braised pork, soy and
sugar



Melnik · Rubin

Suggested pairings — a starting point for tastings with Chinese sommeliers.

The route in five stages



ROUTE AND CHANNELS

Hong Kong: the gateway to the Greater Bay Area

IMPORTS · H1 2026

+20.4%

by value and +4.5% by volume — the first time since 2021 that both have grown together

- No duty on wine — the trading and storage hub for the region
- Growth driven by premium wines and Greater Bay Area demand
- Wine companies are opening offices in Shenzhen to follow their clients
- Ideal for a test shipment and tastings before mainland China

Source: Hong Kong Census and Statistics Department, via VINO Joy News (August 2026)

SELECTION RULES

Three gates before a wine ships

1

Eligibility

- Volume available, and again next vintage
- Ex-cellar price inside the target band
- Analysis and stability for a long shipment
- GACC registration, Chinese back label

2

Blind panel

- Chaired by a Master of Wine
- A Chinese buyer on every panel
- 100-point scale, 88 or more to pass
- Any fault is an automatic reject

3

Market fit

- Packaging and a registered Chinese name
- Price position after duty and freight
- Style that works at a Chinese table
- One sentence of story that translates

Approval is per vintage and expires: a seal that is never withdrawn is worth nothing.

The channels for niche wine

CHANNEL	BEST FOR	WATCH OUT
Specialist importer	First step, small volumes	Exclusivity terms; vet the partner
Restaurants, wine bars, clubs	Brand image, tastings	Slow; needs presence
Gifting and collectors	Limited and premium editions	Seasonal: Chinese New Year, Mid-Autumn
Tmall, JD, Douyin, WeChat	Scale and visibility	High entry cost; only via a partner
“Bulgaria” national pavilion	Fairs, visibility, shared costs	Needs one vision and coordination

FUNDING

Who pays for promotion in China

up to 50%

National Wine Support Programme — promotion in third countries

Co-financing for tastings, fairs, PR, advertising and market studies outside the EU, run through the Executive Agency for Vine and Wine and State Fund Agriculture.

up to 80%

EU agri-food promotion policy (Reg. 1144/2014)

Simple programmes for third countries via annual calls; the applicant is a representative trade or inter-branch organisation — a natural fit for a national campaign.

Rates and conditions to be verified against the current calls.

ROUTE AND CHANNELS

Together as Bulgaria

One national story

A shared narrative and look — “Bulgaria: 6,000 years of wine” — behind every winery.

A national pavilion

Fairs and tastings under one flag — far more visible than going alone.

Shared shipments

Mixed shipments and a range from across the country for one importer — easier to sell.

One bottle is a curiosity. A whole country is a category.

ROUTE AND CHANNELS

The first 12 months



First-year budget: **€50,000**

Target volume: **25,000 bottles**

FUNDING

What it costs one winery

€50,000

first-year programme budget

[12]

member wineries sharing it

50–80%

co-financed from the national and EU programmes

NATIONAL PROGRAMME · 50%

€25,000 stays with the association

≈ €2,080

per winery, for the whole first year

EU REG. 1144/2014 · 80%

€10,000 stays with the association

≈ €830

per winery, for the whole first year

On top of this, each winery pays for its own samples, their shipping and its own travel. Rates to be confirmed against the current calls.

THE DECISION

What we decide today

DECISION	WHO	BY WHEN
Join the China programme, in writing	Each winery	[date]
Pay in the member share	Each winery	[date]
Adopt the selection rules and set the panel date	General meeting	Today
Name one coordinator who answers the importer	The board	[date]
Stop rule: no importer signed, no second tranche	The board	Month 9

A programme with an agreed way to stop is easier to start.

TAKEAWAYS

Three things to remember

1

The market is smaller but seeks value
— an opening for niche wine.

2

Entry runs through a trusted partner,
Hong Kong and personal presence.

3

As Bulgaria, our chance is far greater
than going alone.

