



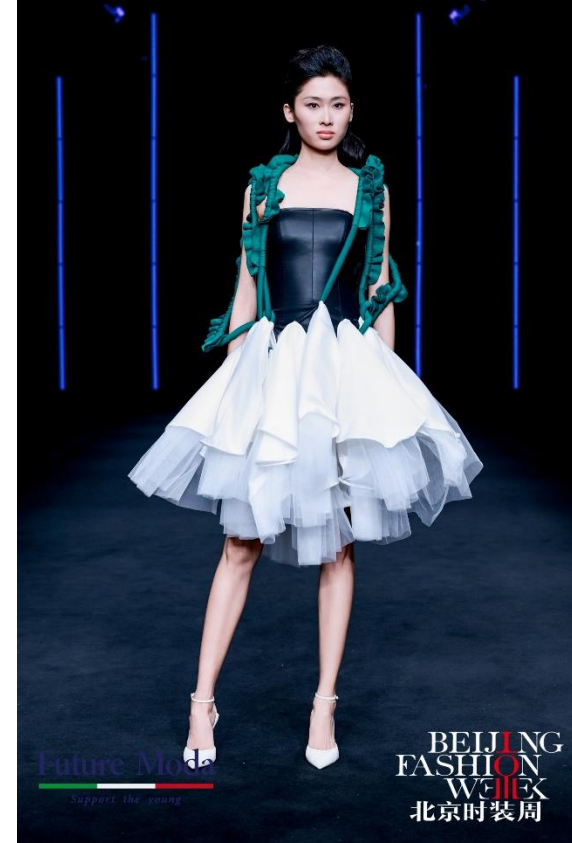
01 JULY 2026

GET TO KNOW CHINA

UNDERSTANDING THE
FASHION MARKET

AGENDA

- 15:50**
CET **Opening Remarks and IP SME Helpdesk Presentation**
- 16:00** **Get to Know China: Understanding the Fashion Market**
- 16:30** **Q&A Session**





We help
European SMEs
**explore the
Chinese market**

ABOUT THE EU SME CENTRE

- The EU SME Centre is an **initiative funded by the European Union** to **assist small and medium-sized enterprises** (SMEs) from EU Member States and countries participating in the Single Market Programme, getting them **ready to do business in China**.
- Our core mission is to facilitate market access and provide a comprehensive range of **free first-line services** to inform, advise, train, and connect SMEs. The Centre forms **partnerships with business support organisations and trade promotion organisations** to bring our services and expertise to European SMEs of all sectors.
- This initiative founded in 2010 is now in Phase V (2025–2028) and is implemented by four consortium partners with two associated partners, with networks throughout Europe and China.

Consortium partners



Camera di Commercio Italiana in Cina
中国意大利商会
China-Italy Chamber of Commerce



European Union
Chamber of Commerce in China
中国欧盟商会



Associated partners



EU-China
Business Association
欧盟中国贸易协会



EU SME
Centre

GET TO KNOW CHINA
30 JUNE 2026

MAIN ACTIVITIES



SELF-DIAGNOSIS TOOL

Online tool that measures your readiness toward the Chinese market



KNOWLEDGE

Comprehensive market reports, guidelines and case studies



ADVICE

Practical and confidential advice on China-related matters



TRAINING

Face-to-face and online training programs to raise awareness



ADVOCACY

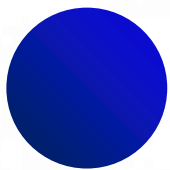
Providing a coherent, consistent and consolidated voice for EU SMEs



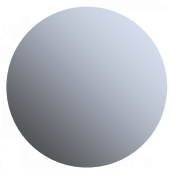
**KEYNOTE
SPEAKER**

FRANCESCO BOGGIO FERRARIS

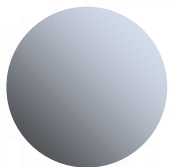
Academy & Marketing Director
Fondazione Italia Cina



1. REGULATORY AND COMPLIANCE LANDSCAPE



2. CHINA'S FASHION MARKET TRENDS



3. CONSUMERS PERSONAS AND SEGMENTATION

1. REGULATORY AND COMPLIANCE LANDSCAPE



SOCIETY AND ECONOMICS

2025

GDP

- **China's nominal GDP 2025: RMB 140.19 trillion (USD 19.5 trillion)**
- **The growth in 2026 is expected to be 4.5 - 5%**

GDP
Pro
capite

- **8/10.000 US\$ - ranking 80° worldwide**
 - 18% of USA's
 - Double centenary target: ranking 1° ww by 2049

Retail
sales

- **+2 / 4% growth YoY, after +3.2% increase vs '24**
 - Driven by sectors like NEV: +29% YoY

Source: NBS National Bureau of Statistics of China, BEA U.S. Bureau of Economic Analysis



FASHION SECTOR FACTS

2025

Apparel retail market
(footwear, accessories,
jewelry, luxury)

- **between USD 276.4 billion
and USD 342 billion**

Share of GDP

- **4,6%**

Online
penetration

- **40/45%**

Sector
breakdowns
and segments

- **Womenswear approx. 57.3%**
- **Menswear and childrenswear**
- **Sportswear**



LUXURY'S FACING NEGATIVE PERFORMANCES IN CHINA



- **#IRL**
From material goods to experiences. The desire for luxury is evolving beyond traditional purchases. EU luxury brands have failed to keep promises of exclusivity. **In-real-life** experiences such as travels, fine dining and exclusive events are increasingly sought after.
- **LTO**
Values are changing: Hofstede's cultural dimension of **long-term orientation** is increasingly applied to purchases, prioritizing goods that maintain their value over time.
- **奢侈耻辱 shēchǐ chǐrǔ**
The **"luxury shame"** phenomenon leads preferences towards products and brands that convey a subtle, understated, more gentle and authentic message, rather than those being loud or flashy.

premise

China remains one of the **world's largest fashion and luxury markets** despite slower economic growth and evolving consumer spending patterns. Still weak reputation due to fast fashion (Shein, Temu).

While the market offers significant opportunities for European fashion brands, **regulatory compliance has become considerably more sophisticated** over the past decade.

Chinese authorities have strengthened market supervision, with stricter enforcement rather than simply introducing new legislation. Consequently, **regulatory compliance** has evolved from a legal necessity into a strategic competitive advantage

*Strategic counseling.
Importance of establishing
collaboration patterns with
China's fashion districts and SEZ*

Jiaxing is a powerhouse in China's fashion and apparel industry, located strategically in Zhejiang Province, midway between Shanghai, Hangzhou, and Suzhou.

The region acts as a massive **global manufacturing hub**, merging centuries-old silk heritage with modern, tech-driven design, sustainable manufacturing, and wholesale distribution



MANDATORY STRATEGIC STEPS TO ACCESS THE MARKET

European fashion companies entering China must navigate an increasingly complex legal framework covering:

- product compliance
- consumer protection
- data governance
- e-commerce regulation
- intellectual property
- advertising
- ESG obligations
- customs requirements
- cross-border trade



MARKET ACCESS AND BUSINESS STRUCTURE

European fashion companies generally enter China through one of the following models:

- Cross-Border E-Commerce (CBEC)
- Distribution through local partners
- Representative Office
- Wholly Foreign-Owned Enterprise (WFOE)
- Joint Venture (less common today)

Alibaba.com provides **cross-border B2B solutions** for European fashion companies, enabling them to sell wholesale—including private label manufacturing, seasonal collections, and excess inventory—to international buyers across more than 200 countries and regions.

- **Global Digital Storefront:** Automatic product translation into more than **16 languages**, allowing suppliers to reach international buyers more effectively.
- **B2B Trade Management:** Integrated tools for handling **Requests for Quotation (RFQs)**, product sampling, negotiations, and large-volume transactions.
- **Institutional Support:** Alibaba.com has established several partnerships to support the internationalization and digital transformation of SMEs through dedicated export promotion initiatives.

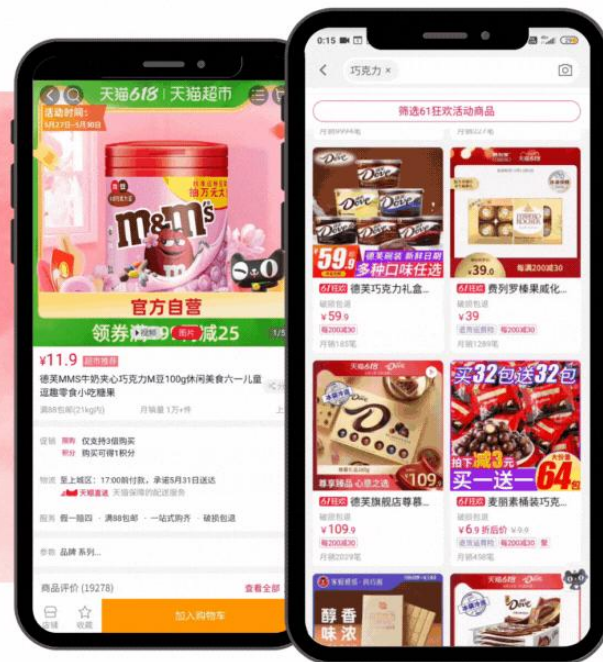
The screenshot displays the Alibaba.com interface with a search bar containing the word "fashion". Below the search bar are navigation tabs: "Al Mode", "Prodotti", "Fornitori", and "Nel mondo". The "Prodotti" tab is selected. Two product listings are visible:

- Product 1:** A grey hoodie. Description: "Felpe con Cappuccio Oversize in Cotone Personalizzate, Tessuto French Terry Pesante 400-500 Gsm, Produttore di...". Price: 8,35-13,15 €. Supplier: Jiangxi Oubao Garment Co., Ltd. (3 anni, CN 5.0/5.0 (14)).
- Product 2:** A brown tote bag. Description: "Contattami per Borse Firmate di Alta Qualità 5A all'Ingrosso, Borse di Marca Famosa, Borse di Lusso da Donna, Bors...". Price: 2,57-3,54 €. Supplier: Shenzhen Plante Technology Co., Limited (1 anno, HK 5.0/5.0 (1)).

Both listings include a "Chatta ora" button. At the bottom of each listing, there are additional metrics: "37% tasso di riordino" for the hoodie and "100+ visualizzazioni dall'Europa" for the bag.

For **B2C** sales targeting the Chinese market, the Alibaba Group operates **Tmall Global**, the leading cross-border e-commerce platform for international brands.

Tmall Global enables fashion companies to sell **directly to Chinese consumers without establishing a legal entity in mainland China**, making it one of the preferred market-entry channels for premium and luxury brands seeking to enter the Chinese market.



LABELLING REQUIREMENTS

Chinese law requires products sold domestically to include labels in Simplified Chinese.

Mandatory information generally includes:

- product name
- fibre composition
- care instructions
- manufacturer or importer information
- country of origin
- product standard reference
- safety category where applicable
- size specifications

7

PHONETIC STRATEGY

LA SPORTIVA

拉思珀蒂瓦

Lāsìpòdàiwá



LA SPORTIVA 577 男女Gore-t...
户外运动



La Sportiva (拉思珀蒂瓦) 徒...
MAX户外



La Sportiva Otaki
Varuste.net

Mostra altre immagini



gearkr.com

<http://gearkr.com> ... Traduci questa pagina

LA SPORTIVA/拉斯帕提瓦Colorado GTX男女中帮登山徒步鞋 ...

LA SPORTIVA/拉斯帕提瓦Colorado GTX男女中帮登山徒步鞋测评报告 ... 9月7日收到体检小红心发来的体验鞋，很兴奋，期待已久终于来了。包装盒上的中文识别，相机不是太好，照的 ...

2

SEMANTIC STRATEGY

APPLE

苹果

Pingguǒ



3 BRAND & PRODUCT NAMING

PHONETIC + SEMANTIC STRATEGY

MONTBLANC
万宝龙

Wànbǎolóng

10 thousand

treasure

dragon





FOUR TREASURES OF THE STUDY

The strategy leverages the positioning of the brand towards intellectuals and professionals by playing with **cultural** references of the target market, not of the origin one

文房四宝

wénfáng sìbǎo



dolcegabbana • Segui

Shanghai, China

dolcegabbana 欢迎开启Dolce & Gabbana

“起筷吃饭” 第2弹。

今天让我们一起品尝西西里传统奶酪卷！觉得自己身在意大利？

不，你正在中国！

Bravissimo!

Welcome to Episode 2 with

Dolce&Gabbana's "Eating with Chopsticks".

Today, we will be eating the traditional

Sicilian cannolo, it feels like Italy but you are in China! GREAT! Bravissimo!

#DGLovesChina

#DGTheGreatShow



Visualizzazioni: 127.259

3 GIORNI FA

Accedi per mettere "Mi piace" o

幽默

SENSE OF HUMOUR

娇羞

SENSE OF SHAME

CULTURE

文化

赎回

REDEMPTION



EUSME
Centre

GET TO KNOW CHINA
30 JUNE 2026

www.eusmecentre.org.cn

相声

xiangsheng
“cross talk”



MONT
BLANC



淑女

shunü

VIRTUOUS
WOMAN

Trasgression and aggressiveness are anticonfucian principles

2. CHINA'S FASHION MARKET TRENDS

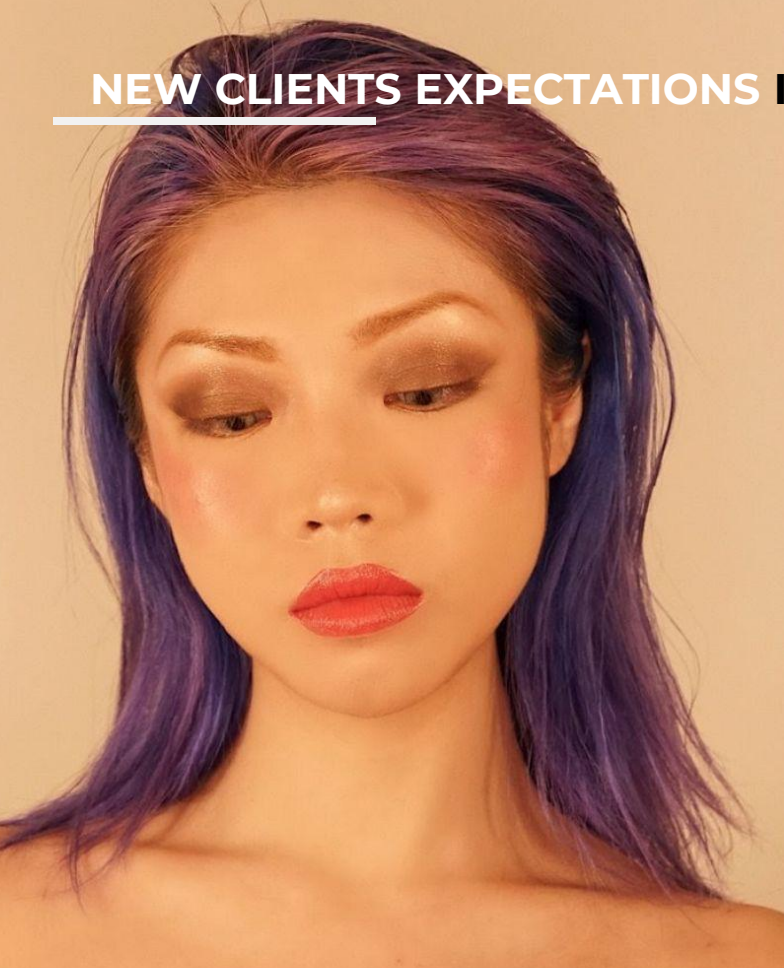


NEW CLIENTS EXPECTATIONS IN BRANDS ENGAGEMENT

1. *SSO is the new SEO* |

87% of online shoppers look to social media to inform purchase decisions





2. | *Authenticity Is Key*

Leverage the authentic voice of user generated content to connect with the modern consumer

IN SEARCH OF AUTHENTIC EXPERIENCES BUT RELYING ON TECHNOLOGY, A SO-ME FOCUSED APPROACH AND...BUSINESS!

LIVE STREAMING
E-COMMERCE + ANTIQUES/FLEAS
MARKET



LIVE STREAMING E-COMMERCE

The LIVE COMMERCE market in 2019 was worth 63 MLD \$, an increase of **220%** compared to 2018.

25% of consumers are daily users, while **71%** follow a LIVE COMMERCE event at least once a week.

Interestingly, the CONVERSION RATE of LIVE COMMERCE sales is much higher than traditional content-based platforms: its popularity has increased **during the COVID-19** crisis as people stay away from shops and showrooms.

LIVE COMMERCE in China is **driven by celebrities**, not by traditional movie or television stars but by online celebrities.



3. *Build Lasting, “Always On” Relationships*

Long-term relationships
key to building **authentic**
and **high-quality content**





ATAWAD

ANY TIME ANY WHERE ANY DEVICE



TOTAL POPULATION

1.4 MLD

Urbanization rate: 70+%



MOBILE USERS

1.2 MIO

99.7% penetration



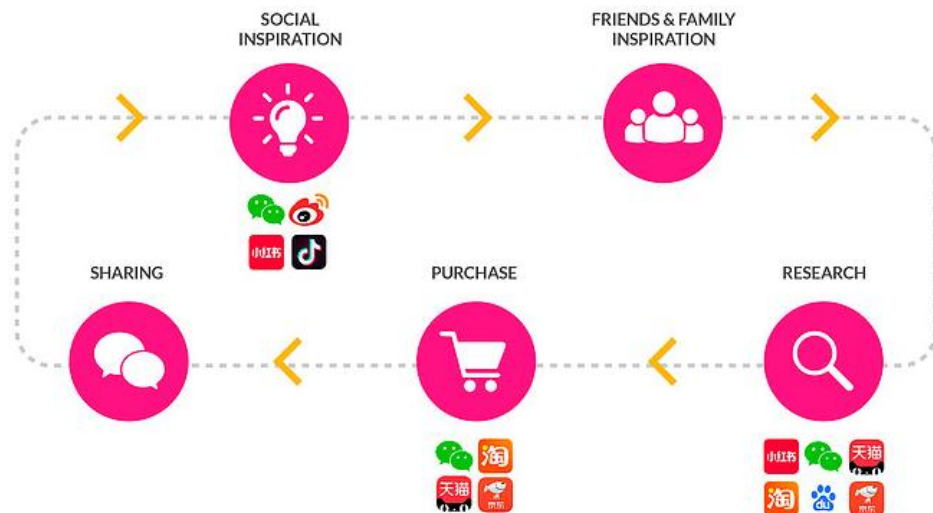
TIME SPENT

8 HOURS

per day

THE CUSTOMER JOURNEY ONLINE

DIFFERENT PURPOSES, DIFFERENT APPS



5 TOUCHPOINTS

BEING THERE

- Presence
- Trust



WECHAT

BEING RELEVANT

- Digital awareness
- Conversation



WEIBO

WECHAT

DOUYIN

BEING AVAILABLE

- Products distribution



TMALL

JD.COM

XIAOHONGSHU

WECHAT

SERVICES

- Physical availability



MEITUAN

TRIP

ALIPAY

WECHAT

WHAT DOES IT MEAN FOR SALES EXPERTS?

Chinese shoppers love O2O!
(online to offline)

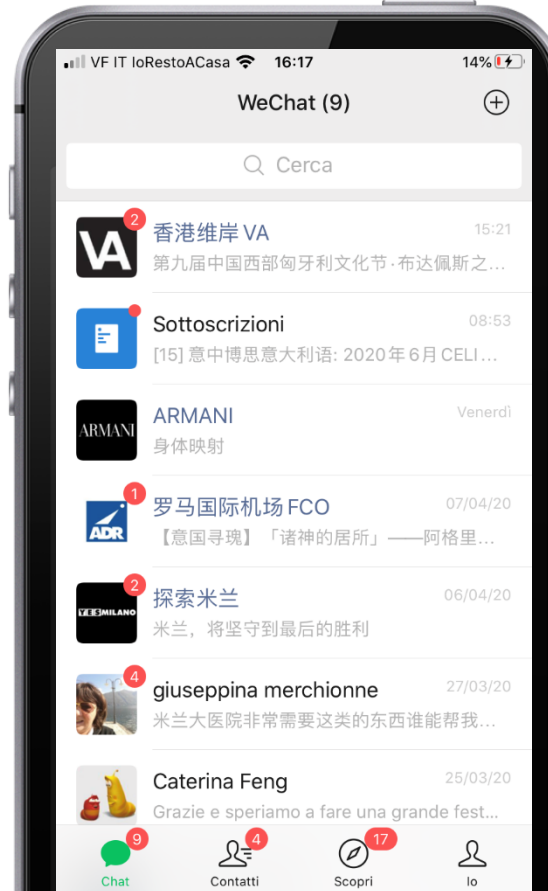
WECHAT: WHAT MAKES IT UNIQUE



- Corporate accounts
- Agentic AI
- WeChat pay
- SuperApp (vert. int.)
- Friends accounts
- 1 to 1 chats
- Group chats

Friends accounts and companies accounts are together, to create a **“family feeling”** which is the basis of a brand new customer xperience.

They will keep you informed and engaged you with **4 post/month**. The secret is companies will treat you like a **friend**.



LITTLE RED BOOK: WHAT MAKES IT UNIQUE



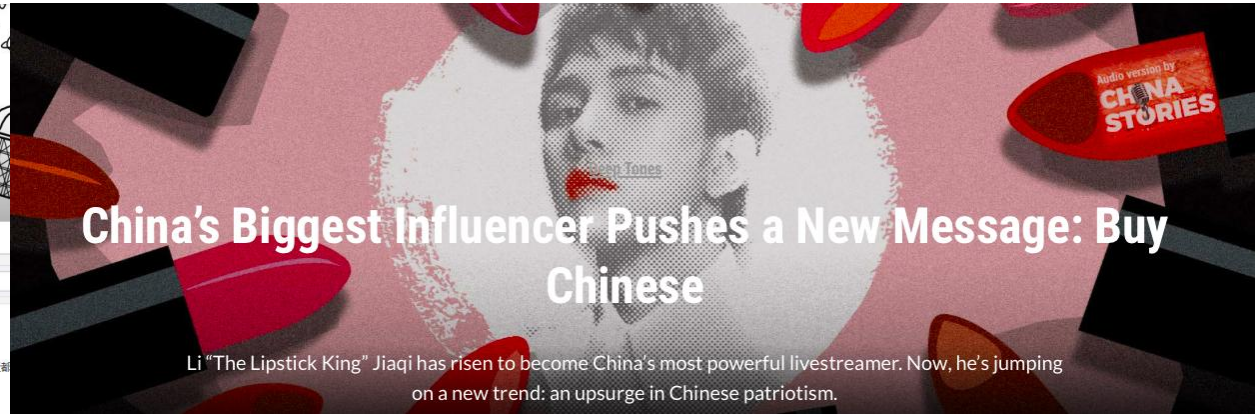
Xiaohongshu, also known as “**little red book**” or “**red**” is one of the largest **social e-commerce** platforms in China. Founded in 2013 as a shopping guide beyond the Great Wall, it mainly attracts consumers who reward **quality** and **authenticity**. It represents an opportunity for international brands.

The 2.7 billion euro Chinese unicorn is mainly focused on **lifestyle** and has more than **300 million users**.

It is a successful cross between **Instagram**, **Pinterest** and **Amazon**. It is based on a **content-driven** model for which content, advertised by users and brands, is given great importance.



KOL – KOC - KOS



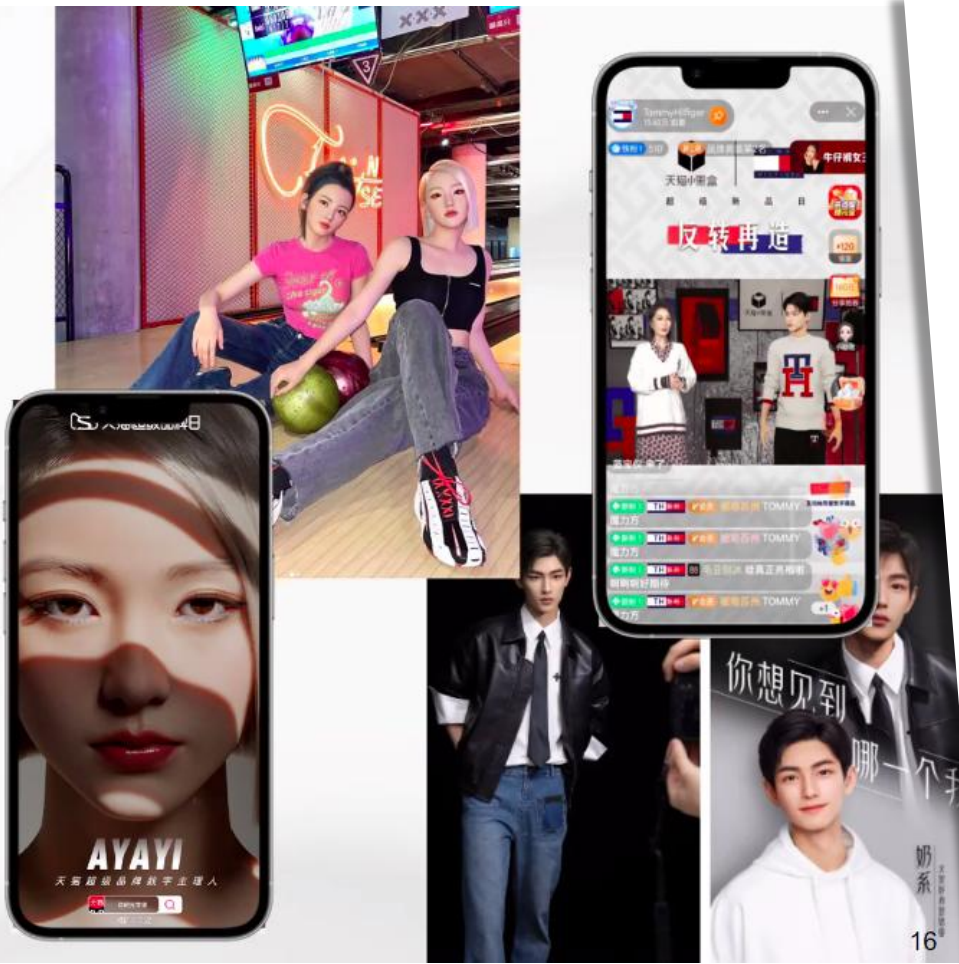
WHY ARE
KOC-KOL-KOS
SO IMPORTANT
IN CHINA?

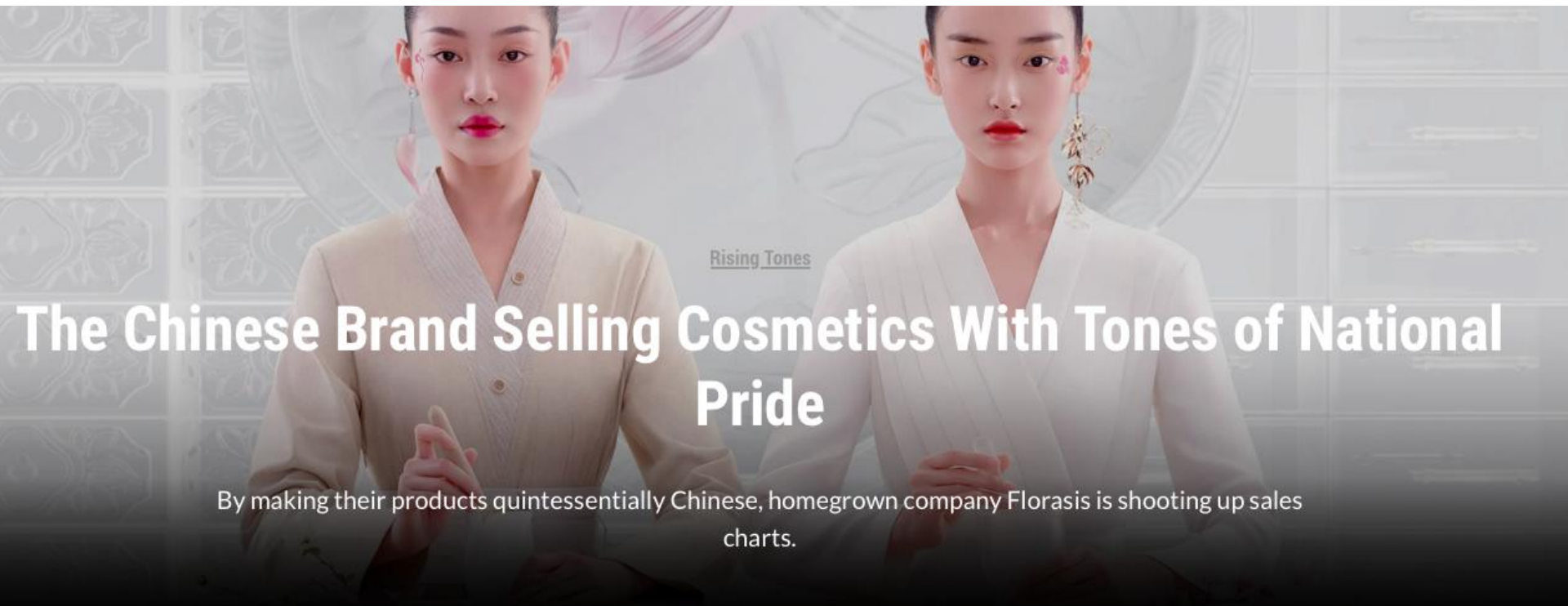
1. Chinese are constantly connected to the web and consider **social networks** as the main source of information
2. Great importance to **their peers** due to **lack of trust** in government communication, official media, corporate websites and even brand social accounts
3. Given the **poor knowledge about brands**, Chinese consumers prefer to follow influencers, to whom they attribute knowledge and quality
4. KOC status and success is also linked to their **personality**, writing style, artistic taste and communication ability

VIRTUAL IDOLS!

AYAYI, the most popular **virtual influencer** has just reached the stunning number of **12 mln followers** on Little Red Book, where she's brand ambassador for L'Oréal, Louis Vuitton and Prada.

The Virtual idols market in China is expect to grow on a 70% rate YOY in the next few years.





Rising Tones

The Chinese Brand Selling Cosmetics With Tones of National Pride

By making their products quintessentially Chinese, homegrown company Florasis is shooting up sales charts.

BRICK AND MORTAR TRADITIONAL MODEL



AGENTIC AI



China is rapidly becoming one of the world's leading markets for **Agentic AI**, where autonomous AI systems perform complex tasks on behalf of consumers and businesses. Agentic AI understands objectives, makes decisions, executes actions, and continuously optimize outcomes with minimal human intervention.

AI Shopping Agents

Chinese e-commerce platforms are shifting from **search-based shopping** to **conversation-based commerce**. Consumers increasingly interact with AI agents that can:

- recommend outfits based on personal preferences
- compare products across brands
- monitor prices
- apply coupons automatically
- complete purchases autonomously

Alibaba has integrated its **Qwen AI** assistant with the entire Taobao marketplace, enabling users to browse, compare, purchase, and manage orders through natural language conversations rather than keyword searches.

When will you restock the trousers in size UK 8?

We'll have them back in store next Tuesday.

Would you like to book an appointment to try them on?

Yes please. I can come in on Tuesday evening after 6pm.

Great, I've booked you in at 7pm.

I'll Whatsapp you a reminder on Monday!

VIRTUAL TRY-ONS: MORE AND MORE SOPHISTICATED

AI applications in the consumer goods retail sector in China are primarily concentrated in the following areas:

- Augmented Reality (AR) and Virtual Reality (VR)
- AI Chatbots
- Virtual Try-Ons
- AI-Powered Advertising
- Virtual Idols, Digital KOLs, and Brand Ambassadors
- The Metaverse
- Machine Learning Applied to Market Analysis

Alibaba Group
阿里巴巴集团



3. CONSUMERS PERSONAS AN SEGMENTATION



PROFILING AND SEGMENTATION OF CHINESE SHOPPERS

A CLUSTER APPROACH

1.
AGE

3.
REGIONS

2.
POST
COVID-19
TRENDS



Three different **clusters** are taken into consideration in order to analyze specific profiles and segments of Chinese consumers through shared characteristic features that allow us to understand their **personas**

1. AGE

3 GENERATIONS

八/九/零零后



“Those born after 2000”

DIGITAL HABITS

“Silver hair”

LINGLINGHOU

YINFA



THEY BOTH
REPRESENT

18%

OF THE
POPULATION

- Digital natives
- More **impulsive** when buying online
- Need **customization** of product
- Heavily **influenced from KOL and KOC**
- Influenced by **E-WOM** (electronic word of mouth)

- More and more **accustomed to technology**
- and **online shopping**
- Strong **purchasing power**
- They spend more time and spend money on **leisure, tourism and art**

Let's get familiar with the main different generations and their Chinese names!



BALINGHOU JIULINGHOU LINGLINGHOU



CHINESE MILLENNIALS

X,Y,Z GENERATIONS
时代

A few numbers first..
According to a Financial Times
report, China has a population of
300 million MILLENNIALS

25%

Population of well-educated
young people with good **job
opportunities** in 1° and 2° Tiers
cities and high wages

73%

Have a **permanent job**

23%

Have a **master degree**

57%

Are **graduated**

TRENDSETTERS

THEY HAVE INFLUENCED
YOUNGER GENERATIONS
ALL OVER THE WORLD
leading them to new
consumption and purchasing
trends

THEIR CONCEPTION OF TIME

They grew up writing long letters
to their loved one, willing to **wait**
for the postman to deliver them
to their boyfriend or girlfriend's
door.

ROMANTIC, PASSIONATE,
APPRECIATE PATIENCE AND
DETERMINATION

BALINGHOU

WHAT DOES IT MEAN FOR CLIENT ADVISORS?

Chinese *linghou* appreciate
storytelling
and information

Picture courtesy of: Corriere della Sera

TRENDFOLLOWERS

FOLLOW TRENDS AND BUY
GOODS AND SERVICES
CREATED BY THE PREVIOUS
GENERATION

Open to suggestions and ideas in
sales and always need to know what
is the latest fashion

THEIR CONCEPTION OF TIME

They grew up as **digital natives** and
are used since childhood to spend
up to **8h/day on social media** and
short video platforms.
Everything with them must be fast!

JIULINGHOU^{2.}

WHAT DOES IT MEAN FOR CLIENT ADVISORS?

Chinese *jiulinghou* are more
open to cross
selling/upselling and to be
inspired by
latest trends

Picture courtesy of: Corriere della Sera

3. LINGLINGHOU

Chinese luxury consumers are younger than their European and American counterparts, averaging only 33 years old. In the next 5 years the market will be dominated by even younger consumers:

25 years old

educated, traveling and technology lovers

Born in an era where everything must be **spectacular**:
reality, video, songs, dance:
appearance
as the daily axiom of existence.

The message they receive is:
the **world is fun** and **entertainment**
is a very important part of everyday
life

奇葩

qipa

exotic flowers
"weirdos"



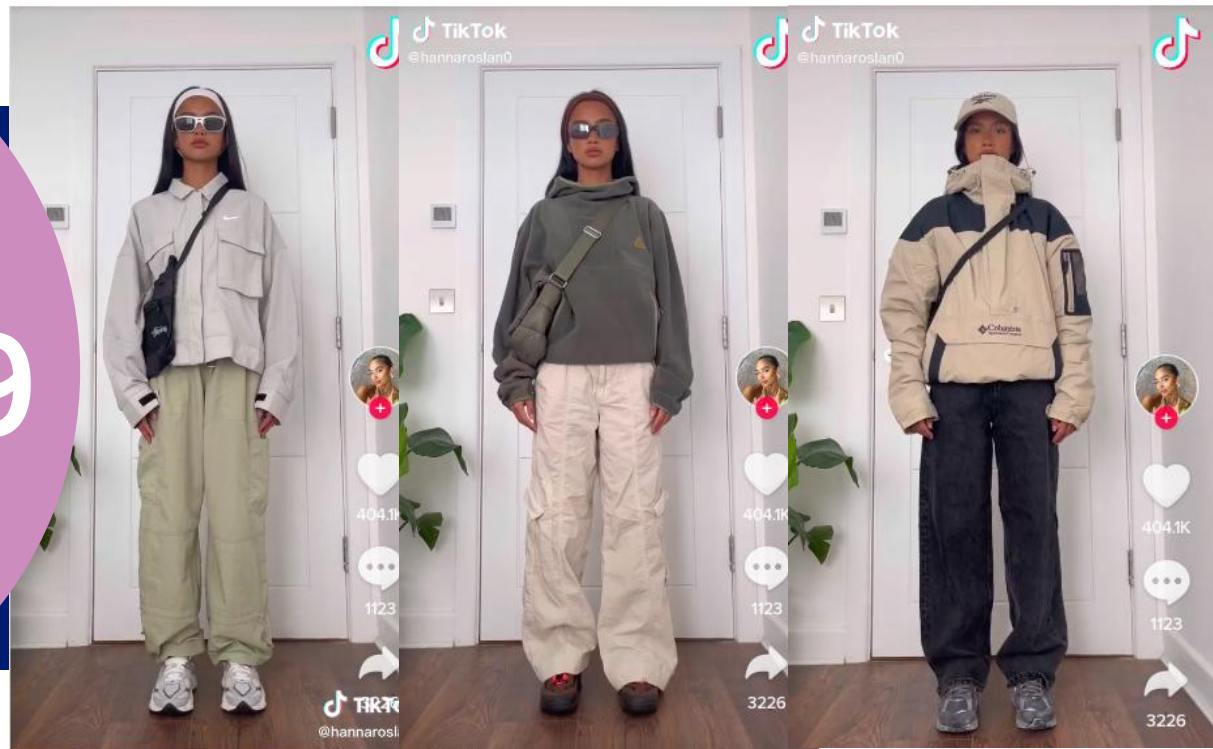
línghèi

UNIQUE

They love to capture ideas and influences from different styles and break established codes.

They want to be **INSPIRED**, not **GUIDED**.

2. POST COVID-19 TRENDS



GUOCHAO: CHINA CHIC

The rise of CHINA CHIC

after years of R&D, collaboration with global partners and investments, today Chinese brands are on the rise among local consumers and their quality and offer are top notch.

As shoppers become wealthier and savvier, **functionality** has become the most important factor influencing the purchases of fast-moving consumer goods.. Combining high-quality design with functionality will be key to catering to Chinese consumers — evidenced by the rise of specialized clothing or niche outdoor lines.



G U O C H A O

国潮

guócháo

guó

NATIONAL

cháo

WAVE

Take Chinese down apparel specialist **Bosideng**, which ranked first globally in down jacket sales. Its Dongfeng jacket series is marketed as high-tech and field-tested, equipped with four-layer temperature control and 5G communication technology.

3 EMERGING Z GEN / ALFA GEN FASHION TRENDS



1.

G O R P C O R E

高能量核

gāonéng liànghé

High energy

Nucleus

Acronym of ***Good Ol' Raisins and Peanuts***, a classic energy mix for tackling long hikes in nature, this trend is not exactly new, but the aesthetic movement took hold within **Chinese Z generation** consumers during the **lockdown periods**, when everyone - and especially those who live in the city - expressed, even in style, the need to reconnect with nature.

3 EMERGING Z GEN / ALFA GEN FASHION TRENDS



小红书 ID: 632692061



2.

I N T E L L E C T U A L C H I C

知识分子穿搭

Zhīshi fēnzi chuāndā

Intellectuals wear

“**Brainy is the new sexy**” writes Xiaohongshu user @BettySays. One of the most popular fashion trends in China, has over 51 million views on the Chinese lifestyle platform. Like many of the styles on this list, Intellectual Chic is heavily influenced by **vintage apparel** but offers a more bookish and **laid-back vibe**. Several posts reference **Diane Keaton**’s character in the 1977 movie *Annie Hall*, where she’s seen accessorizing a white button-down and khakis with a vest, necktie, and bowler hat. Synonymous with intelligence, literature and art, independence and relaxation. Typical pieces (largely menswear) include vests, cardigans, trench coats, and suits coupled with glasses and loafers.

3 EMERGING Z GEN / ALFA GEN FASHION TRENDS



小红书 ID: liangliang1111



3.

O L D M O N E Y

时尚老钱风

shíshàng lǎoqián fēng

Fashion Old money style

Think Intellectual Chic but much more preppy. The **Old Money Aesthetic** is about **lowkey luxury** rather than in-your-face logos. Characterized by **chinos**, **oxford shirts**, **tweed blazers**, **cardigans** (tied over the shoulder, of course) and **V-neck sweaters** in shades of **beige**, **cream** and **blue**, the ensemble is perfect for trips out on the yacht or a polo game. Although the style has been around for a long time, the term started trending on TikTok in 2021, and the hashtag #oldmoneyaesthetic in China attracted 30 million views on Xiaohongshu. Values it conveys: being well-educated, well-rounded and, somewhat ironically, not easily swayed by the trends of the time.

3. REGIONS





Just as significant as the differences in passports, currency, police force, legal systems, work environment are **cultural and differences as well as difference in consumption styles and trends.**

HMT
HONGKONG
MACAO
TAIWAN

香港台

XiangAoTai

太太

“tai tai”

The “tai tai” is a globalized consumer who has a deep-rooted love for luxury goods, very sophisticated and with personal perception of value and preference.

Ladies who end up marrying the city's high-status men: highly-educated, or high-powered career women but unlike Mainland Chinese, are more likely to **sacrifice their career** and embrace a homemaker role.

71% of HK women are financial decision maker in their houses.

Chanel, Hermès, Dior:
favourite iconic brands

Hong Kong

Hong Kong women are **less purely focused on shopping** like Mainland Chinese, and more about **experience**: fine dining, entertainment occasions, spa complex lovers.

Plus

1. No VPN needed and use Facebook as well as WeChat
2. Feel even more at ease with digital payments
3. Cantonese vs. Mandarin
4. Traditional vs. Simplified Chinese
5. Prevalence of English
6. Hongkongers tend to be more superstitious

Francesco Boggio Ferraris

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Italy China Council Foundation

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谢谢

THANK YOU!

Q&A



EUSME
Centre

GET TO KNOW CHINA
30 JUNE 2026

THANK YOU FOR TAKING PART

Find out more about our next events & activities

The EU SME Centre helps European SMEs get ready for China by providing them with a range of information, advice, training and support services.

