Weinakademie Österreich Weinakademiker Thesis (D7) Abstract

Beyond Substitution : Cultural Barriers and Strategic Pathways for Wine in Mainland China's Baijiu-Centric Market

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I. MOTIVATION

China's alcoholic beverage market is among the most culturally complex in the world. Baijiu, the dominant spirit, is not merely a commercial product but a deeply embedded social institution, connected to Confucian notions of hierarchy, duty, and collective identity (cf. Lan, Y., & Jin, L. (2025); Yang, M. (1994)). Its ritual drinking practices, most visibly the ganbei toast, function as social contracts that express trust and reciprocity in professional and ceremonial contexts (cf. Szto, M. (2013)).

Wine has grown in visibility, particularly among younger urban consumers who associate it with cosmopolitan taste and personal lifestyle. Yet it remains marginal in the contexts where baijiu's cultural authority is strongest (cf. Smith Maguire, J. (2017), p. 31–59). The 2025 revision of China's anti-waste regulations, which formally restricted alcohol at official occasions, has disrupted baijiu's traditional institutional base and opened new questions about the market's direction (cf. General Office of the CPC Central Committee and State Council (2025)). This shifting landscape motivated a closer examination of the cultural and structural barriers facing wine, as well as the strategic options available to industry stakeholders.

II. OBJECTIVE

This thesis investigates what cultural barriers prevent wine from integrating into China's baijiu-centred drinking system, and what strategic pathways might allow wine to develop sustainably in the current policy and social environment. Rather than asking whether wine can replace baijiu, the thesis asks where wine can grow on its own terms and how the industry should position itself to support that growth.

III. METHODOLOGY

The thesis is based entirely on secondary sources, including peer-reviewed academic literature, industry analysis, and policy documents. It draws on four complementary theoretical frameworks. Cultural consumption theory, following Bourdieu, treats beverage choices as socially meaningful acts that communicate status and identity (cf. Bourdieu, P. (1984); Bourdieu, P. (1986), pp. 241 258). Ritual theory, particularly Szto's ganbei contract model, explains why baijiu's social role is so difficult to replicate (cf. Szto, M. (2013); Douglas, M. (Ed.) (1987)). Legitimacy theory, drawing on Suchman's institutional framework, identifies what wine would need in order to be seen as culturally appropriate in Chinese social contexts (cf. Suchman, M. C. (1995), p. 571–610). Market development theory, especially Kim and Mauborgne's blue ocean model, provides the strategic logic for wine's positioning away from direct competition with baijiu (cf. Kim, W. C., Mauborgne, R. (2005)).

IV. CONTENT

The thesis is structured in six sections. The introduction sets out the central question and the policy context. Section 2 reviews the theoretical literature across four frameworks: cultural consumption theory, ritual theory, legitimacy

theory, and market development models. Sections 3 and 4 examine the cultural structures of baijiu and wine respectively. Baijiu's dominance is traced to its integration with hierarchical social rituals, masculine identity performance, gift and business culture, and ceremonial symbolism (cf. Fu, C. (2022), p. 439–445; Shen, A., Antonopoulos, G. A. (2017), p. 273–295). Wine, by contrast, is positioned through narratives of terroir, personal taste, lifestyle aspiration, and increasing gender inclusivity (cf. Bourdieu, P. (1984); Masset, P., Terrier, L., Livat, F. (2023), p. 273–285). Section 5 maps the structural tensions between the two drinks using what the thesis calls the cultural conflict matrix. This framework identifies four axes of divergence: ritual duty versus personal enjoyment; group conformity versus individual choice; masculine performance versus inclusive appeal; and local roots versus foreign origins. These axes are mutually reinforcing, which is why wine's barriers are persistent and difficult to overcome through conventional market strategies alone (cf. Smith Maguire, J. (2017), p. 31–59; Holt, D. B. (1998), p. 1–25). Section 6 sets out four strategic pathways. The first is parallel market development: rather than competing with baijiu in its strongest contexts, wine should develop in the social spaces where baijiu's ritual logic does not apply, such as informal dining, private entertaining, and lifestyle consumption (cf. Kim, W. C., Mauborgne, R. (2005); Camillo, A. A. (2012), p. 68–92). The second focuses on the post-restriction market: as the 2025 regulations have reduced formal baijiu occasions, wine is better placed to expand through informal and digital channels (cf. Liu, S., Huang, F., Zhu, X., Zhou, S., Si, X., Zhao, Y., Liu, Y., Zhang, X., Casswell, S. (2022), p. 5866; Hu L, Galli M, Sebastiani R (2024), p. 875–891). The third is gender repositioning: communicating wine as a gender-neutral lifestyle choice broadens its appeal and sidesteps the masculine performance logic of baijiu culture (cf. Remaud H, Forbes SL (2012), p. 146–159). The fourth is food pairing: developing pairing recommendations adapted to Chinese regional cuisine makes wine feel relevant rather than foreign (cf. Yabin W, Li J (2020), p. 2385–2401; Robinson, J. (Ed.) (2015)). Wine education, delivered through digital platforms and industry partnerships, underpins all four pathways (cf. Trotta, A., Massaglia, S., Ballotta, S., Palma, S., Bailet, I., Liu, C. (2015), p. 03011; Zhang, J. (2020), p. 637–655).

V. CONCLUSION

The thesis concludes that the barriers facing wine in China are primarily cultural and structural rather than commercial. Baijiu operates as a system of social obligation that binds together hierarchy, masculine identity, relational duty, and national symbolism (cf. Szto, M. (2013); Lan, Y., & Jin, L. (2025)). Wine operates on an entirely different social logic, centred on individual choice, aesthetic pleasure, and lifestyle aspiration (cf. Bourdieu, P. (1984); Smith Maguire, J. (2017), p. 31–59). Direct substitution is neither realistic nor the right strategic goal.

The parallel market development model is the most viable framework for wine's growth. Cultural integration is better understood as a gradual accumulation: each new context in which wine becomes accepted adds to the foundation for broader legitimacy. The 2025 regulations, while creating short-term uncertainty, have simultaneously opened space for wine in the informal and personal consumption contexts where it is most competitive. Importers should shift focus away from institutional channels; educators should expand digital reach; marketers should prioritise food pairing and gender-neutral positioning. These strategies are most effective when pursued in a coordinated way, so that educational efforts reinforce brand positioning, digital campaigns support food pairing, and gender-neutral messaging is embedded across all consumer touchpoints (cf. Palla, G. (2022); Marisi, F. (2020), p. 197–238).