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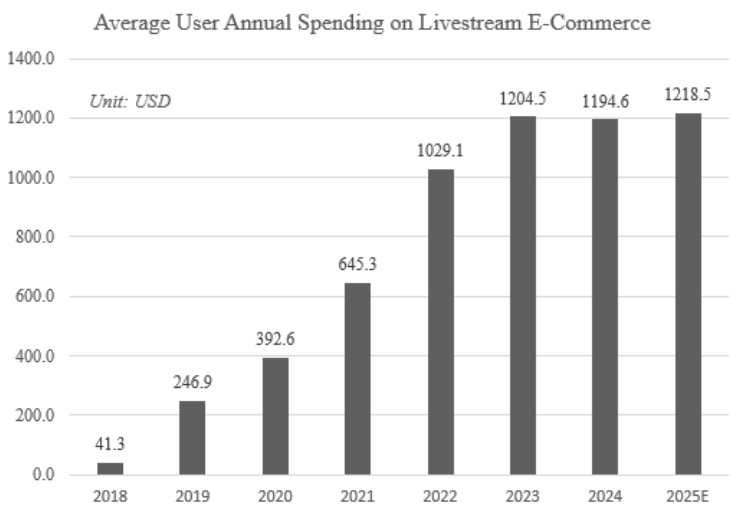
Report Highlights:

This report provides a comprehensive analysis of China's expanding livestreaming e-commerce sector, a key driver transforming retail in the world's largest online market. It offers U.S. exporters in-depth insights into how livestreaming has developed into a strategic channel for market entry, consumer engagement, and brand communication. Through an examination of industry evolution, platform differentiation, and prevailing market trends, this report examines the ability of livestreaming platforms, multi-channel networks (MCNs), service providers and influencers to enhance the market presence of imported products.

Livestreaming E-commerce Overview

China has been the world’s largest online retail market for 12 consecutive years. In 2024, China’s online retail sales grew by 7.2 percent. New retail models such as livestreaming have significantly contributed to the growth of e-commerce in China. “Livestreaming e-commerce” is a form of online retail in which individuals or brand merchants utilize livestreaming as a marketing channel. By leveraging e-commerce platforms to engage directly with audiences, businesses can enhance user reach, promote products, and ultimately facilitate transactions.

In 2024, the size of China’s livestreaming e-commerce market reached approximately \$807 billion. By December 2024, the number of online livestreaming users in China reached 833 million, accounting for 75.2 percent of all internet users. Livestreaming e-commerce users have become the core driver of the consumption market. According to consulting firm iResearch, China’s livestreaming e-commerce market is projected to grow at a compound annual growth rate (CAGR) of 18 percent between 2024 and 2026. A research team from the Chinese Academy of Social Sciences estimates that in 2024, livestreaming e-commerce accounted for 80 percent of incremental growth in the e-commerce sector.



Source: Sina Corporation

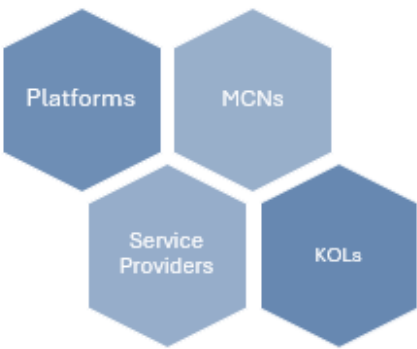
Industry Development

The development of livestreaming e-commerce has reshaped the e-commerce ecosystem and transformed consumer behavior—from passive searching to active discovery, from one-way communication to two-way interaction, and from price competition to value resonance.



At present, livestreaming e-commerce consists of four main groups: platforms, MCN (multi-channel network) organizations, service providers, and KOL (key opinion leader) hosts.

In the “2024 China Livestreaming E-Commerce Top 100 Ranking”, a total of 13 platforms, 37 MCN companies, 21 service providers, and 29 KOLs were featured. (Appendix I for the full list).

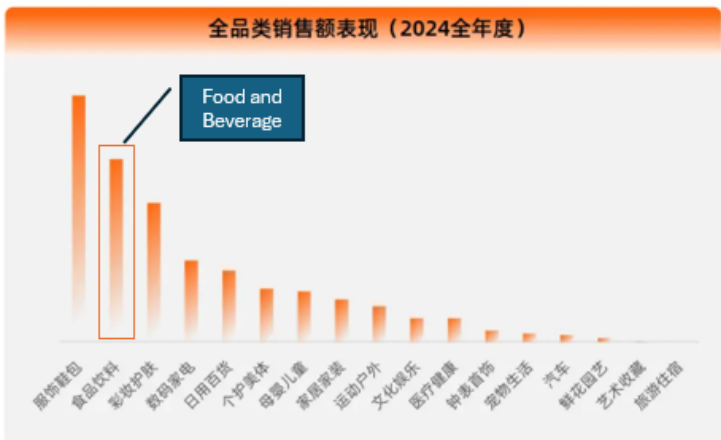


Livestreaming in the Food and Beverage Space

The food and beverage industry is one of the sectors most transformed by live-streaming e-commerce. From marketing strategies to sales formats, from distribution channels to overall sales performance, the industry is undergoing a sweeping transformation driven by live-streaming commerce.

According to the 2024 Food and Beverage Industry Omnichannel Marketing White Paper jointly released by Ocean Engine and NielsenIQ, Chinese consumers are increasingly accustomed to the “watch-and-buy” shopping model. Content-based e-commerce (such as livestreaming and short videos) is driving growth in the food and beverage sector, with a year-on-year increase of 30 percent. Consumers are not only placing direct orders while watching livestreams or short videos, but also afterwards. In 2024, 48 percent of food and beverage shoppers searched for and purchased products after being inspired by online content. Moreover, 62 percent of consumers learned about a brand through content channels, exceeding the 56 percent share of traditional media.

According to Douyin e-commerce food and beverage marketing trend reports, food and beverages ranked as No.2 category by sales volume among the top categories across Douyin’s e-commerce platform in 2024. With a growth rate of 36 percent, the food and beverages category ranked as one of top 10 high-growth major categories leading platform overall growth in 2024.

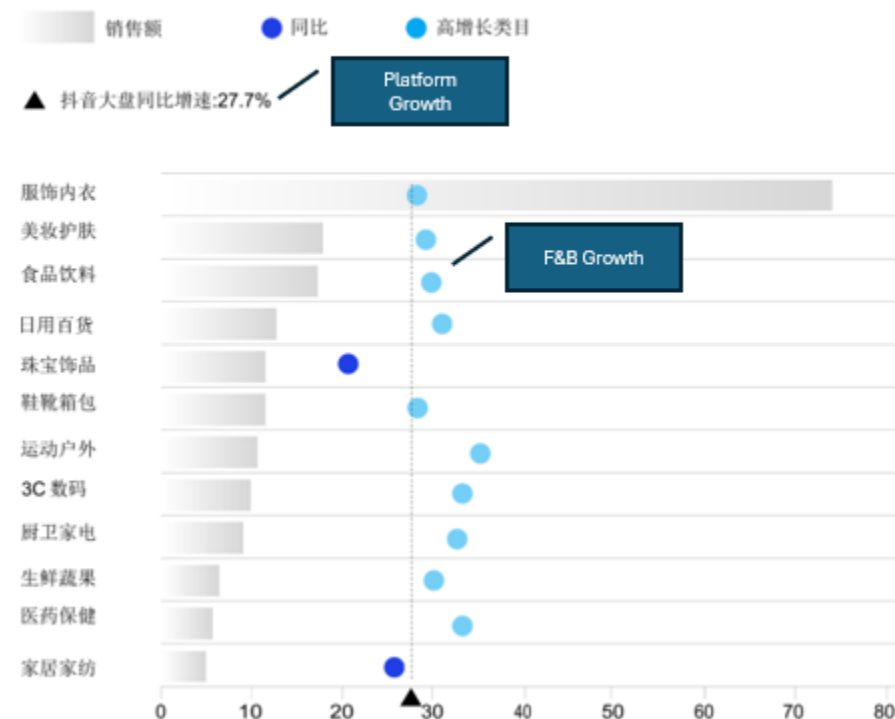


- Douyin 2024 Sales Breakdown by Category**
- 1. Apparel, Shoes & Bags: 25%
 - 2. Food & Beverages: 18%
 - 3. Cosmetics & Skincare: 14%
 - 4. Electronics & Home Appliances: 8%
 - 5. Daily Necessities & General Merchandise: 7%

Source: YoumiYoushu Data

Douyin 2024 (Jan.-Nov.) Category Growth Trend

2024年1-11月抖音电商一级品类销售表现², %



Source: Sina, TecDat

Note: Light blue shows top 10 high-growth major categories

Rapid Growth in Agricultural Livestreaming E-commerce

China's agricultural sector is experiencing a digital transformation, fueled by advances in artificial intelligence and the rapid rise of instant retail models. Once one of the most traditional segments of the economy, agricultural product sales have evolved into a sophisticated ecosystem that integrates leading e-commerce platforms, livestreaming commerce, and private-domain channels. In the first half of 2025, livestreaming e-commerce accounted for over 30-35 percent of total agricultural e-commerce GMV, underscoring its position as a key driver of the sector's digitalization.

China's rural internet user base has reached 322 million, representing an internet penetration rate of 70 percent. Across rural regions, a growing number of small and medium-sized e-commerce enterprises are leveraging livestream technologies—ranging from warehouse and factory streaming to field and village streaming—to promote local specialty products to national audiences. This shift has given rise to a new generation of local influencers, reducing the dominance of top-tier livestream hosts and creating more opportunities across the agricultural e-commerce landscape.

The Competitive Landscape – Leading Platforms

Livestreaming e-commerce emerged in China in 2016 and accelerated during the COVID-19 pandemic as lockdowns kept consumers at home and boosted online shopping. Since then, it has become one of

the most dynamic and competitive sectors of China's digital economy. As the market matures, leading platforms are diversifying their strategies. Major platforms like Douyin (TikTok), Kuaishou, Taobao, and Shipinhao have each developed distinct business models and positioning strategies to capture their share of China's rapidly evolving livestreaming market.



Douyin (抖音) – Douyin, also known as TikTok, is best known for its “entertainment e-commerce” model, combining content-driven and shelf-based shopping experiences to meet diverse consumer needs. It currently holds the largest share of China's livestreaming e-commerce total gross merchandise value (GMV) market, ahead of Kuaishou and Taobao Live. In 2024, Douyin's total e-commerce GMV reached \$487 billion, with livestreaming accounting for approximately 40-58 percent of that total. The platform's strength lies in its ability to integrate entertainment, AI-driven recommendation algorithms, and seamless checkout, enabling both major brands and small merchants to scale efficiently through store-hosted livestreams and KOLs.



Kuaishou (快手) – Originally launched as a GIF-sharing app in 2011, Kuaishou pivoted to short videos in 2012 and began livestreaming around 2016. By leveraging private-domain traffic, it has created highly engaging shopping scenarios. Kuaishou's livestreaming business remains particularly strong in lower-tier cities and rural markets, where content is community-driven. Unlike platforms that rely heavily on mega-influencers, Kuaishou's success stems from local relationships and repeat purchase cycles, making it especially effective for FMCG, local specialties, and everyday consumer goods.



Taobao Live (淘宝直播) - Taobao Live (Diantao) remains a dominant force in China's livestreaming e-commerce market, deeply integrated within Alibaba's commerce ecosystem. It has historically led the industry in user penetration and transaction volume, serving as a key channel for brands seeking structured, professional, and results-driven livestreaming. The platform is particularly strong for merchants that emphasize product demonstrations, brand credibility, and large-scale promotional events. Most broadcasts are formal, hosted by experienced anchors with strong brand affiliations. Its integration with Alibaba's payment, logistics, and Tmall/Taobao store systems helps the company to achieve high conversion rates.



WeChat's **Shipinhao (视频号)** has rapidly emerged as a livestreaming e-commerce player. Integrated within WeChat's vast ecosystem, Shipinhao enables seamless livestreaming experiences without the need for additional app downloads. This integration allows brands to leverage both public traffic from the "Discovery" feed and private traffic from Mini Programs and Official Accounts. The platform supports various interactive features, including live chats, rewards, and product showcases, facilitating real-time engagement and direct purchases. Notably, sectors like food, fashion and cosmetics have seen significant traction. As WeChat continues to enhance its livestreaming capabilities, Shipinhao presents a promising avenue for brands aiming to tap into China's expansive e-commerce market.

Market Drivers

1. **Store-Led Streams Dominate:** Store-operated livestreaming (“店播”), typically hosted directly by a brand’s in-store staff, is increasingly favored by platforms such as Douyin, Kuaishou, and Tmall for its authenticity, accurate product information, and lower marketing costs compared to celebrity or KOL hosts. In 2024, store-operated livestreaming drove over half of the overall livestreaming GMV, outpacing KOL-led sessions. Small brands can control their narrative without relying on pricey influencers.
2. **Consumption Power in Lower-Tier Cities:** Lower-tier markets (third-tier and below) contributed 45 percent of new users, highlighting their growing consumption potential. Supported by lower living costs, lighter work pressure, and relatively low household debt, these markets are showing rising spending power and a trend toward consumption upgrading. However, purchasing power still lags behind top-tier cities, where the average order value reaches \$39, compared with \$17 in lower-tier cities.
3. **AI-Powered Personalization:** AI-driven hosts are rapidly gaining traction in the livestreaming industry. The market value of digital-human solution providers has increased fivefold over the past two years, reflecting strong investor interest and technological adoption. Interactive AI hosts are beginning to appear in livestreaming scenarios, bringing new visual appeal and engagement to content. Operating 24/7 without interruption, AI hosts not only help merchants reduce labor costs but also enable a diverse range of livestreaming content to better engage audiences.
4. **Private Domain Marketing:** Private-domain livestreaming rooms operate in separate groups, where users cannot swipe to other streams. This setup helps merchants protect their customer assets. In 2025, private-domain livestreaming has emerged as one of the fastest-growing segments, with a single session capable of generating \$400k–\$700k in sales. Moreover, refund/return rates remain as low as 3 percent, significantly below industry averages, reflecting stronger consumer relationship and higher conversion quality.

Best Practices for U.S. Exporters Selling in China

To succeed in China’s highly competitive livestreaming e-commerce market, foreign brands must move beyond simply hiring an influencer. Sustainable success requires a well-planned strategy that integrates market understanding, brand localization, and data-driven execution.

1. **Choose the Right Platform:** Evaluate major platforms based on user demographics, traffic patterns, commission structures, and available promotional tools. (This [advisory](#) contains information about the risks of using Chinese owned or hosted applications.)
2. **Work with Local Experts:** Collaborate with experienced service providers. Local experts understand consumer behavior, cultural nuances, and compliance requirements, helping U.S. brands navigate complex regulations and avoid costly missteps.

3. **Start Small and Scale Strategically:** Begin with a focused product portfolio, emphasizing a few high-potential SKUs to test audience response, pricing, and messaging. Use data from early campaigns to refine your approach before expanding product lines or increasing marketing investment.
4. **Localize the Brand:** Adapt your brand story, packaging, and communication style to resonate with Chinese consumers. Consider leveraging private-domain channels to build customer loyalty and deliver personalized experiences that strengthen brand trust.
5. **Tailor Marketing with KOLs and Influencers:** Partner strategically with key opinion leaders (KOLs) and content creators whose audiences align with your brand's positioning. Foreign brand hosts can also livestream from overseas through the platforms' cross-border e-commerce programs.
6. **Develop a Clear Pricing Strategy:** Develop a clear pricing strategy that maintains sufficient margin for MCNs, KOLs, distributors, and platform promotions. In China's livestreaming ecosystem, heavy discounts during major festivals can sometimes push consumer-facing prices below distributor costs, disrupting supply chains. U.S. exporters should coordinate closely with partners to ensure price consistency and protect channel health.
7. **Consider Livestreaming at Trade Shows:** Livestreaming at trade shows is a popular Chinese phenomenon that merges traditional exhibition marketing with digital outreach. Exhibitors at major events broadcast live from their booths, engaging both in-person visitors and online audiences simultaneously. This hybrid model allows U.S. exporters to extend their visibility beyond the exhibition floor, showcase products in real time, and interact directly with Chinese consumers through comments and promotions. Incorporating livestreaming into a trade show presence can help U.S. companies generate leads, test market reactions, and enhance brand exposure at a relatively low cost.

The photo below, taken by ATO staff at a local meat industry trade show, shows the company's sales team setting up livestreaming equipment and engaging with online brand followers:



Additional Best Practices for U.S. Food & Beverage Exporters

Food and beverage products face unique regulatory, cultural, and marketing dynamics in China's livestreaming ecosystem. In addition to the general best practices above, U.S. F&B exporters should consider the following:

1. **Meet China's Food Safety and Labeling Requirements:** Ensure all products comply with China's standards, ingredient regulations, and import documentation rules.
2. **Highlight Quality, Authenticity, and Traceability:** Chinese consumers value food safety and origin transparency. Emphasize sourcing, certifications, and quality control processes. Use traceable QR codes or visual demonstrations during livestreams to reinforce product authenticity.
3. **Use Sensory Storytelling and Demonstrations:** Because taste drives food and beverage purchases, incorporate live tastings, preparation demonstrations, and descriptive flavor narratives. Equip influencers with clear talking points, pairing ideas, or consumption scenarios.
4. **Optimize Packaging for Chinese Consumers:** Adjust packaging formats to meet local preferences, including giftable formats, smaller trial sizes, or festival-themed bundles. Attractive and practical packaging significantly improves livestream conversion rates.
5. **Time Promotions Around Key Consumption Seasons:** Major shopping festivals (Singles' Day, 618), gift-giving holidays (Lunar New Year, Mid-Autumn Festival), and seasonal food trends can greatly influence F&B demand. Aligning livestream campaigns with these periods can boost visibility and sales.
6. **Work With Food-Savvy KOLs:** Select influencers experienced in tasting, cooking, or reviewing food and beverage products. Their credibility helps address consumer questions about flavor, usage, and preparation, improving trust and purchase intent.

7. **Plan Inventory for High-Demand Spikes:** Livestreaming can create sudden, concentrated bursts of orders—especially for snacks, beverages, and premium U.S. food products. Pre-position inventory in bonded warehouses or local fulfillment hubs to prevent stockouts.
8. **Communicate Shelf Life and Storage Clearly:** Provide clear guidance on refrigeration needs, storage tips, and post-opening shelf life. These are among the most common consumer questions during F&B livestreams.
9. **Offer Trial Packs and Sample Promotions:** Sampling is particularly effective for food and beverage categories. Provide mini-size packs, flavor assortments, or low-cost trial bundles to encourage first-time purchases and build consumer confidence.
10. **Highlight Nutritional Benefits Responsibly:** Promote clean-label ingredients, U.S. certifications, or natural health attributes—but avoid overstated or unapproved health claims, which are strictly regulated in China’s livestreaming environment.

Conclusion

Livestreaming e-commerce has evolved into a powerful engine of growth in China’s retail landscape—reshaping how consumers discover, evaluate, and purchase products. The food, agriculture, and beverage sectors have emerged among the best-selling and fastest-growing categories, driven by rising consumer interest in quality, freshness, nutrition, and authenticity. Livestreaming offers a uniquely immersive format for showcasing these attributes, enabling brands to demonstrate product origin, traceability, and preparation in real time—factors that strongly influence Chinese consumers’ trust and purchase decisions.

For U.S. exporters, livestreaming represents a direct bridge to Chinese consumers, offering new ways to tell the story of American quality, safety, and farm-to-table transparency. As platforms like Douyin, Taobao Live, and WeChat’s Shipinhao refine their commerce ecosystems, opportunities are expanding for foreign agricultural and food brands to localize content, partner with MCNs and distributors, and participate in targeted campaigns that convert awareness into measurable sales. With its combination of scale, interactivity, and storytelling power, livestreaming e-commerce presents a new opportunity for food and agricultural exporters seeking to build brand equity and capture market share in China’s evolving digital economy.

Related GAIN Reports

[China: China E-Commerce Report - Strategic Insights for US Food Agricultural and Beverage Exporters \(2025\)](#)

[China: Staying Cool - How New Cold Chains Provide Opportunities for US Fresh Products in China's Cross-border E-commerce \(2025\)](#)

[China Cross-Border E-commerce Market Opportunities for US Agricultural Products \(2023\)](#)

[Using the Crossborder Ecommerce Channel to Increase US Food Imports to China \(2019\)](#)

[China Passes E-Commerce Law \(2018\)](#)

[Chinese Government Policies Change for Cross-Border e-Commerce \(2016\)](#)

For more information, please contact ATO Shanghai at atoshanghai@usda.gov.

Appendix I.

“2024 China Livestream E-Commerce Top 100 Ranking”

1. Platform Category (11 companies):

淘宝直播 (Taobao Live), 多多直播 (Pinduoduo Live), 京东直播 (JD Live), 抖音电商 (Douyin E-Commerce), 快手电商 (Kuaishou E-Commerce), 苏宁直播 (Suning Live), 蘑菇街直播 (Mogujie Live), 唯品会直播 (Vipshop Live), 小红书直播 (Xiaohongshu/RED Live), 哔哩哔哩 (Bilibili), 视频号 (WeChat Channels).

2. MCN Category (37 companies):

谦寻文化 (Qianxun Culture), 美腕 (Meiwan), 辛有志严选 (Xin Youzhi Yanxuan), 遥望 (Yaowang), 交个朋友 (Make Friends), 无忧传媒 (Wuyou Media), 东方甄选 (Oriental Selection), 与辉同行 (With Hui), 如涵 (Ruhnn), 泰洋川禾 (Taiyang Chuanhe), 蜂群文化 (Beehive Culture), 大禹网络 (Dayu Network), 青藤文化 (Qingteng Culture), 宸帆 (Chenfan), 嘻柚互娱 (Xiyou Entertainment), 构美 (Goumei), 快美 (Kuaimei), 古麦嘉禾 (Gumai Jiahe), 二咖传媒 (Erka Media), 热度电商 (Redu E-Commerce), 集淘 (Jitao), 洋葱视频 (Onion Video), 侵尘文化 (Qinchen Culture), 乾派文化 (Qianpai Culture), 仙梓文化 (Xianzi Culture), 缙苏 (Tisu), 彦祖文化 (Yanzu Culture), 君盟 (Junmeng), 白兔控股 (White Rabbit Holdings), 愿景未来 (Vision Future), 优蜜 (Youmi), 全尚文化 (Quanshang Culture), 锐趣文化 (Ruiqu Culture), 三只羊网络 (Three Sheep Network), 奇东传媒 (Qidong Media), 麦芽传媒 (Maiya Media), 奇光传媒 (Qiguang Media).

3. Service Provider Category (21 companies):

有赞 (Youzan), 微盟 (Weimob), 魔筷科技 (Mokuai Technology), 蚊子会 (Wenzihui), 小鹅通 (Xiaoetong), 商派 (ShopEx), 大商创 (Dashangchuang), 红呗 (Hongbei), 米络星传媒 (Miloxing Media), 众灿互动 (Zhongcan Interactive), 银河众星 (Galaxy Stars), 巨鲸帮帮 (Whale Bangbang), 云犀直播 (Yunxi Live), 影行天下 (Yingxing Tianxia), 索象 (Suoxiang), 微赞直播 (Weizan Live), 微吼直播 (Weihou Live), 有播 (Youbo), 优大人 (Youdaren), 蝉妈妈 (Chanmama), 飞瓜数据 (Feigua Data).

4. Livestream Hosts Category (29 individuals):

李佳琦 (Li Jiaqi), 蛋蛋 (Dandan), 辛巴 (Xinba), 罗永浩 (Luo Yonghao), 董宇辉 (Dong Yuhui), 时大漂亮 (Shi Dapiao), 广东夫妇 (Guangdong Couple), 疯狂小杨哥 (Crazy Little Yang), 太原老葛 (Taiyuan Old Ge), 蜜蜂惊喜社 (Bee Surprise Society), 香菇来了 (Mushroom is Coming), 贾乃亮 (Jia Nailiang), 董先生 (Mr. Dong), 陈洁 kiki (Chen Jie Kiki), 烈儿宝贝 (Lie'er Baby), 刘媛媛 (Liu Yuanyuan), 高芊芊 (Gao Yuyu), 多余和毛毛姐 (Duoyu & Maomaojie), 小小 101 (Xiaoxiao 101), 麦小登 (Mai Xiaodeng), 老吴很帅 (Handsome Lao Wu), 陈三废姐弟 (Chen Sanfei Siblings), 国岳 (Guo Yue), 彩虹夫妇 (Rainbow Couple), 黄宥明 (Huang Youming), 骆王宇 (Luo Wangyu), 郝劭文 (Hao Shaowen), 李宣卓 (Li Xuanzhuo), 董洁 (Dong Jie).

5. Lifestyle Service E-Commerce Category (2 companies):

美团 (Meituan), 携程 (Ctrip/Trip.com).

Attachments:

No Attachments.