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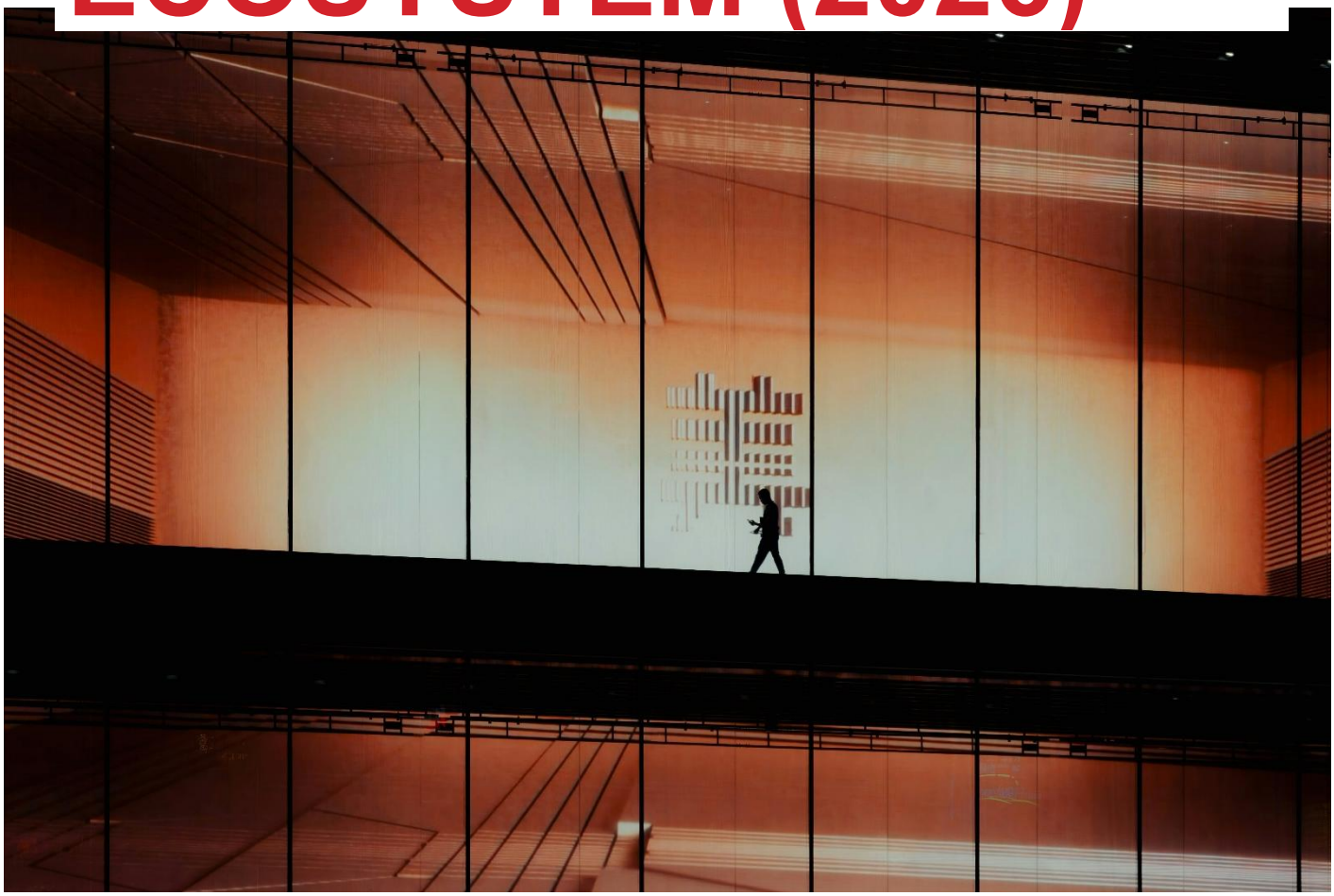
Strategic Guidance for Swiss Companies

CHINA'S B2C DIGITAL ECOSYSTEM (2026)



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CHINA'S DIGITAL ECOSYSTEM: STRATEGIC GUIDANCE FOR SWISS COMPANIES 2026

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1. Foreword

The Swiss Business Hub China commissioned this updated guide to help Swiss companies make practical, well-informed decisions within China's rapidly evolving digital ecosystem. China remains the world's largest e-commerce market. However, achieving success in today's market requires more than just ensuring product quality. Visibility, credibility, and conversion are increasingly determined within integrated platforms, where content, community, transactions, and fulfilment are combined in a unified user experience.

For Swiss SMEs, the challenge is rarely a lack of options, but rather knowing where to focus and how to execute. This report is designed as a practical working tool. It helps you compare routes to market, prioritize a minimum viable platform mix, understand typical partner models, and set realistic expectations for investment and timelines. This approach enables organizations to mitigate risk, accelerate learning, and scale with discipline.

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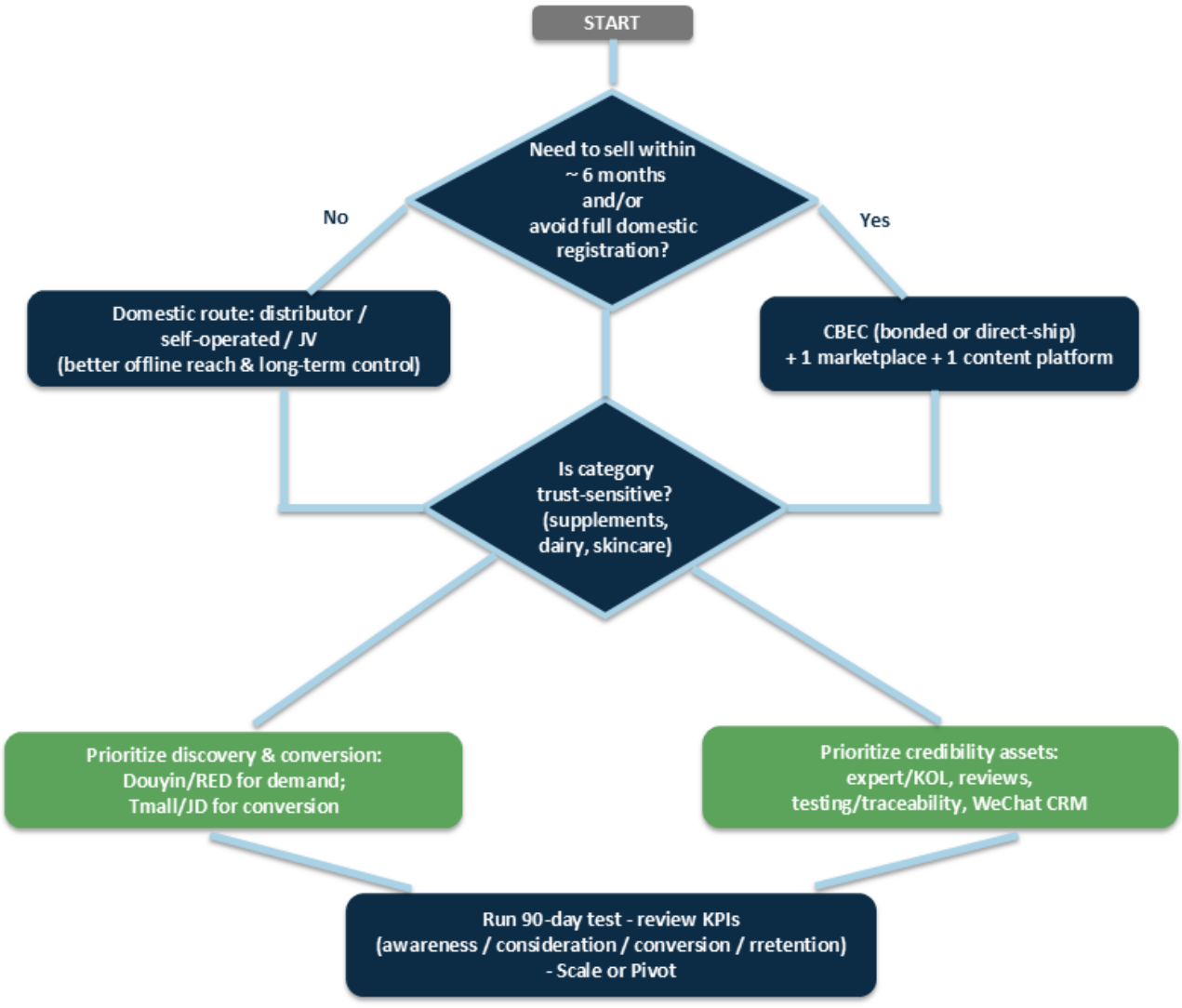
2. How to Use This Report

This report is designed as a playbook for Swiss SMEs in the commercial goods sector. Use it to understand digital marketing strategies, select a route to market, and choose the minimum viable platform mix before scaling up.

2.1. MARKET DIAGNOSIS MAPPING

1) Decide your route-to-market (CBEC vs. domestic) based on compliance timeline, budget, and control needs.
2) Select 1 or 2 priority platforms based on your category's trust signals and discovery behavior.
3) Execute a 90-day trial (Weeks 0–12) with clear KPIs across awareness, consideration, conversion, and retention.
4) After 90 days, double down, switch platforms, or pause, based on unit economics and repeat signals, not vanity metrics.

2.2. QUICK DECISION FLOW



3. Executive Summary

3.1. MARKET CONTEXT

China remains a strategically important but increasingly complex market for Swiss companies. Product quality alone is no longer sufficient; visibility, credibility, and relevance within China's digital ecosystem now determine commercial outcomes.

China's consumer environment has entered a new phase of digital maturity. Social media, e-commerce, livestreaming, instant retail, and AI-powered discovery are converging into a highly integrated ecosystem. Platforms such as RED, Douyin, WeChat, Tmall, and JD increasingly shape the entire consumer journey, from brand discovery and evaluation to purchase and post-sales engagement. For Swiss SMEs, understanding this convergence is essential to making informed investment and market-entry decisions.

3.2. STRATEGIC IMPLICATIONS FOR SWISS COMPANIES

Focus beats breadth. Despite the scale of China's digital landscape, early success typically comes from disciplined focus. Most Swiss SMEs should prioritize one to two e-commerce touchpoints like Tmall and/or JD, supported by a limited number of social platforms, most commonly RED, Douyin, and WeChat, before expanding further.

Discovery is increasingly AI-driven. AI-powered search, summarized Q&A, and recommendation systems embedded within major platforms are reshaping how consumers research brands, particularly in health, skincare, and lifestyle categories. This increases the strategic importance of credible, consistent content and peer discussion, as platform algorithms increasingly determine brand visibility.

Livestreaming is now structural, not tactical. Livestreaming has become a core component of China's digital commerce model, combining education, entertainment, and conversion. Alongside instant retail, it significantly shortens the path from awareness to purchase and must be factored into go-to-market strategies from the outset.

Investment must be aligned with ambition. A basic market presence can be established with relatively modest budgets, but meaningful and scalable performance requires sustained investment. For most SMEs, profitability is a medium-term objective, with break-even commonly achieved in years two to three. The size of the market offers substantial upside once a foothold is secured, but expectations must remain realistic.

Local capability is a critical enabler. Speed, cultural understanding, and execution excellence are decisive in China. Most Swiss companies rely on local partners or dedicated Chinese staff to manage platform operations, influencer ecosystems, livestreaming, and customer service. The choice of operating model should be viewed as a strategic decision, not a tactical one.

Category selection matters. Health supplements, skincare, dairy, and selected lifestyle segments, such as outdoor and functional fashion, offer strong alignment with Switzerland's country image of quality, science, nature, and trust. However, regulatory complexity and intense domestic competition require careful category prioritization and positioning.

Data, localization, and service quality are non-negotiable. Winning brands in China actively leverage platform data, localize content and messaging, align with key cultural moments, and meet exceptionally high expectations for customer service and after-sales support. Failure in any of these areas can quickly undermine brand credibility.

4. Strategic Context for Operating in China's Digital Ecosystem

4.1. DEFINING CHINA'S DIGITAL ECOSYSTEM

Chinese consumers are highly active in a mobile-first, highly connected digital environment, where communication, entertainment, information discovery, and shopping are closely intertwined. As a result, the online landscape in China is significantly more dynamic and integrated than what most European brands are accustomed to. For ease of reading, this report distinguishes between 'Social Media Platforms' and 'E-commerce Platforms'. In practice, however, the boundary between these platforms has largely disappeared. Product discovery, evaluation, and purchasing increasingly take place within content-driven platforms such as Douyin, RED, and WeChat Channels, which combine short video, livestreaming, social interaction, and in-platform commerce. A sound strategy in China must therefore reflect this integrated reality. Brands need to coordinate content creation, influencer activity, livestreaming, and sales conversion across both social commerce platforms and traditional e-commerce marketplaces such as Tmall and JD, while also aligning online efforts with offline channels and overseas touchpoints that reach Chinese consumers.

4.2. HOW CHINA'S DIGITAL PLATFORMS ARE STRUCTURED AND USED

Most major digital platforms in China were initially built around a specific core function, but over time have evolved into highly integrated ecosystems combining social interaction, content, livestreaming, and e-commerce. As a result, the boundaries between social media platforms (such as WeChat, Douyin, and RED) and e-commerce platforms have become increasingly blurred. For Swiss SMEs, effective strategies typically involve maintaining a basic presence across several relevant platforms, while focusing resources and investment on one or two priority channels, rather than spreading efforts too thin.

Unlike in Europe, where brand-owned websites or retailer websites remain important, standalone "brand.com" sites account for only a very small share of e-commerce activity in China. Instead, platform-based commerce dominates. Major e-commerce platforms such as Tmall and JD are far more immersive than platforms like Amazon, with brands operating official "flagship stores" that function as mini-websites hosted within the platform itself. Cross-border versions of these platforms often serve as a practical entry point for foreign brands. A successful China strategy therefore requires coordinated execution across both content-driven platforms and established e-commerce marketplaces, rather than treating them as separate channels.

4.3. PARTNER MODELS: NAVIGATING COMPLEXITY THROUGH LOCAL EXPERTISE

For foreign companies entering China without local staff, market knowledge, or operational experience, navigating the digital ecosystem independently can be overwhelming. As a result, most Swiss companies work with a local partner - commonly referred to as a "TP" (originally meaning Taobao Partner, but now used more broadly to describe service providers managing e-commerce and social commerce platforms, known as Third Party). In some cases, platforms still require brands to engage a TP. Swiss Business Hub China has published a separate factsheet dedicated to introducing TPs, which can be consulted for further guidance.

However, it remains critical for brands to develop their own understanding of China's digital ecosystem. This enables them to select suitable partners, clearly articulate their objectives, and gradually take ownership of certain operational elements where appropriate. The TP industry has become more mature in recent years, with more standardized service models and greater fee transparency. Nevertheless, brands that enter partnerships without sufficient preparation often incur high costs over several years and ultimately exit the market with limited results. A thoughtful and informed approach to partner selection is therefore a key factor in achieving sustainable performance in China.

4.4. SETTING REALISTIC INVESTMENT AND PROFITABILITY EXPECTATIONS

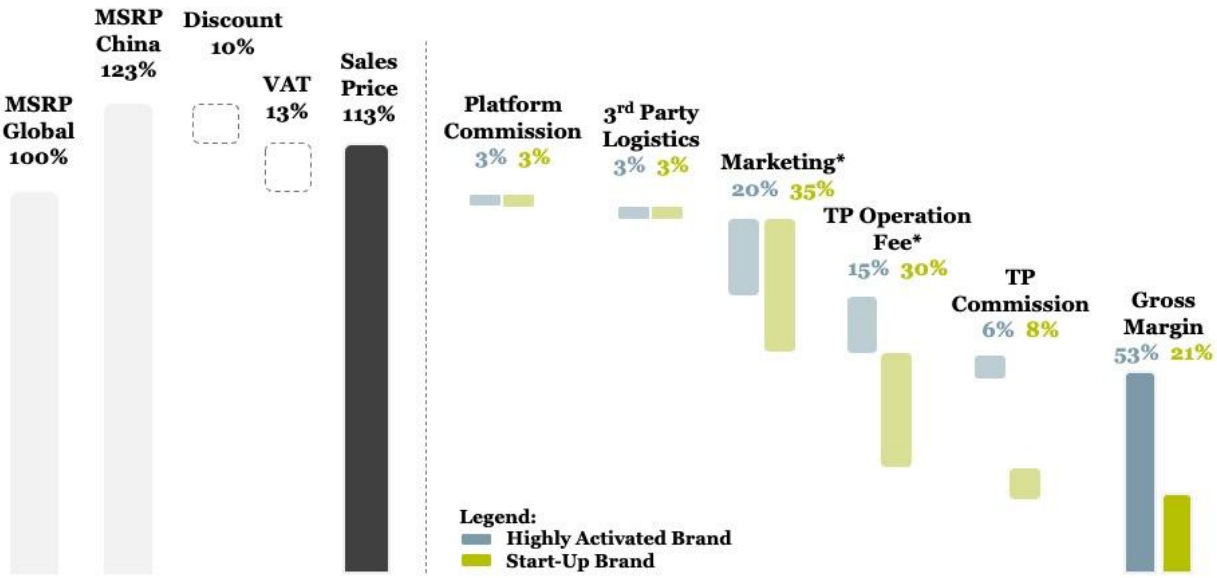
The graphic below is important for Swiss companies considering entry into China. It shows how revenue from a single sale is typically allocated across platform-related costs for brands operating official "flagship stores," the standard e-commerce model in China. The comparison highlights two typical situations: a brand entering the market for the first time as a Start-Up Brand, and a more established brand with stronger awareness and higher sales as a Highly Activated Brand.

As illustrated, achieving break-even in the early years can be challenging, particularly for new entrants (note that the cost of goods and other operating expenses are not included). A China strategy should therefore be viewed as a medium- to long-term investment. TP service fees and marketing costs vary by category, brand positioning, and scale, and competitive pressure means brands must plan not only for on-platform promotion (such as Tmall advertising) but also selective off-platform activity, including content platforms like RED and occasional offline initiatives.

While these investments may limit short-term profitability, they support sustainable brand building and effective pricing over time. For most Swiss SMEs, reaching e-commerce break-even within two to three years is a realistic and widely observed outcome when entry is well planned, and expectations are set appropriately.

Graphic 1: China Market Investment (No Product or Other Operating Costs Included)

High-level marketing and service investment in China under two scenarios: a start-up brand and a highly activated brand



Note*:

1. Marketing costs primarily cover e-commerce and social media activities.
2. TP Operation Fee refers to monthly retainers (typically CHF 2,200-6,500/month/platform), structured as either a higher operation fee with lower commission or a lower operation fee with higher commission; social commerce platforms tend to have lower fixed fees but higher commissions.

Source: China Skinny, expert interviews

4.5. UNDERSTANDING MARKETING AND OPERATING COST STRUCTURES

Market benchmarks indicate that marketing investment on e-commerce (mainly Tmall) and social media activities typically accounts for **28%-35% of Net GMV (Gross Merchandise Value).** Spending levels vary

by category and brand positioning, with high-end brands generally operating at the lower end of this range, while mass-market FMCG brands require higher investment due to competitive intensity.

These benchmarks provide a practical reference point for Swiss companies planning entry or expansion in China. Actual costs will depend on brand maturity, category dynamics, and growth objectives, but marketing should be viewed as a sustained operating investment rather than a one-off launch expense.

Table 1: China Marketing Cost
Indicative marketing cost in China, covering e-commerce (mainly Tmall) and social media

Category	Industry Average (of Net GMV)	High-end Brands	Mass Market FMCG
Tmall on-platform advertising	12%-15%	8%-12%	15%-18%
Social Media Activity	15%-20%	10%-15%	18%-22%
Overall Marketing*	28%-35%	25%-30%	32%-38%

Source: China Skinny, public info
Note: "Overall Marketing" reflects the combined spending of the two categories above. However, it's not a simple sum because budget allocation typically shifts across different e-commerce and social media platforms.

4.6. AI RESHAPING CHINA'S DIGITAL MARKETING LANDSCAPE

As China moves into 2026, AI is rapidly reshaping the fundamentals of digital marketing. AI adoption in marketing has accelerated far faster than expected, driving a structural shift in how content is produced, distributed, and consumed. Most notably, AI-powered search and recommendation engines are becoming a primary gateway for information discovery, fundamentally altering traffic logic. Users increasingly rely on AI-generated answers rather than clicking through traditional search results, meaning that brand visibility now depends on whether a brand is recognized, trusted, and recommended by AI systems - not simply ranked on a webpage.

To transition from traditional Search Engine Optimization (SEO) to Generative Engine Optimization (GEO) in AI-driven search, brands must establish themselves as credible sources within AI knowledge systems. This requires creating structured, evidence-based content that clearly explains product applications, benefits, and real-world use cases instead of relying on promotional claims. Brands should also strengthen their presence on authoritative, high-trust platforms such as official websites, industry media, knowledge platforms, and professional communities where AI models commonly source information. By mapping consumer scenarios and questions to practical solutions and maintaining consistent, reliable information across channels, brands can improve their visibility in AI responses and increase the likelihood that they will be recommended in AI-generated answers.

At the same time, short-form video has emerged as a preferred input format for AI-driven discovery. Compared with text-only content, video offers richer, multi-modal signals that AI systems use to assess relevance and quality. This trend is reinforcing the importance of scalable video content across platforms and use cases. However, the speed and volume of content required under this model have made traditional, manual production methods increasingly difficult to sustain, especially for brands managing broad product portfolios.

In response, AI-enabled content and marketing systems are increasingly being integrated into brand marketing operations. These tools automate large parts of the content lifecycle, from generation and optimization to distribution, allowing brands to operate at scale while controlling cost. Looking ahead, AI is expected to become a core component of marketing infrastructure rather than a tactical add-on, supporting both short-term performance and long-term brand asset building. Early and structured adoption is likely to offer meaningful advantages as competition within AI-driven ecosystems intensifies.

4.7. CROSS-BORDER VS. DOMESTIC E-COMMERCE: STRATEGIC TRADE-OFFS

An important distinction within China's e-commerce landscape for Swiss companies is Cross-Border E-commerce (CBEC). In simple terms, CBEC refers to dedicated channels within major e-commerce platforms for imported products. While CBEC represents only a small share of China's total e-commerce market, CBEC listings are often displayed alongside domestic products in consumer search results. For eligible products sold through approved CBEC channels, imports are generally not subject to the same registration, filing, and licensing requirements as products imported through general trade.

In practice, Chinese consumers primarily use Taobao, China's largest C2C platform, where search results may include listings from Tmall (China's leading B2C platform), Tmall Global (the largest CBEC platform), as well as native Taobao sellers. Similar CBEC models are also integrated into other major platforms, including JD, Douyin, and RED, allowing consumers to browse imported and domestic products within the same app environment.

CBEC is often a natural first entry route for foreign companies, as it generally offers a lower operational and regulatory barrier. Products can be shipped directly from overseas warehouses, local product registration is not required, and brands can usually access support from Europe-based platform representatives during setup and launch.

Brands selling larger volumes through CBEC will often sell products through bonded warehouses, meaning their imported products are stored in warehousing located in free trade zones within Mainland China, allowing much swifter delivery times for products sold, overcoming a large barrier for many consumers considering purchasing through CBEC.

For categories such as skincare, cosmetics, and health products, CBEC is particularly relevant, as certain domestic regulatory requirements can be difficult or impractical for SMEs to meet. Swiss Business Hub China commissioned a dedicated report on Cross-Border E-commerce in 2026, available on its website, which provides practical guidance and entry options for interested brands.

5. E-commerce and Social Media Platforms: Market Structure and Roles

Numerous digital platforms may become relevant for Swiss companies operating in China once they are established in the market and able to compete effectively with leading brands. However, during market entry and the early years, e-commerce activity is typically concentrated on the major platforms such as **Tmall and JD (including their cross-border versions)**, while social media and content activation focus primarily on **WeChat, RED, and Douyin**.

Over time, these social media platforms are also becoming increasingly important revenue drivers, particularly Douyin, which continues to expand its e-commerce capabilities. The data below is sourced from publicly available annual reports published by the respective platforms and companies.

China's digital platform landscape is rapidly evolving, driven by the growing integration of social media and e-commerce functions. Rather than serving a single function, leading platforms now operate as integrated ecosystems that combine content, community, transaction, and fulfilment. For brands, success depends less on being present everywhere and more on understanding the distinct roles each platform plays within the consumer journey.

5.1. E-COMMERCE PLATFORMS: FROM MARKETPLACES TO MULTI-MODAL RETAIL

5.1.1. Core E-commerce Platforms

Alibaba (Tmall/Taobao) continues to lead China's e-commerce market by GMV, while JD maintains strengths in logistics reliability, authenticity, and higher-end categories. At the same time, Douyin e-commerce has rapidly consolidated its position among the top players through its content-led model, and Pinduoduo continues to gain share by serving price-sensitive and lower-tier markets.

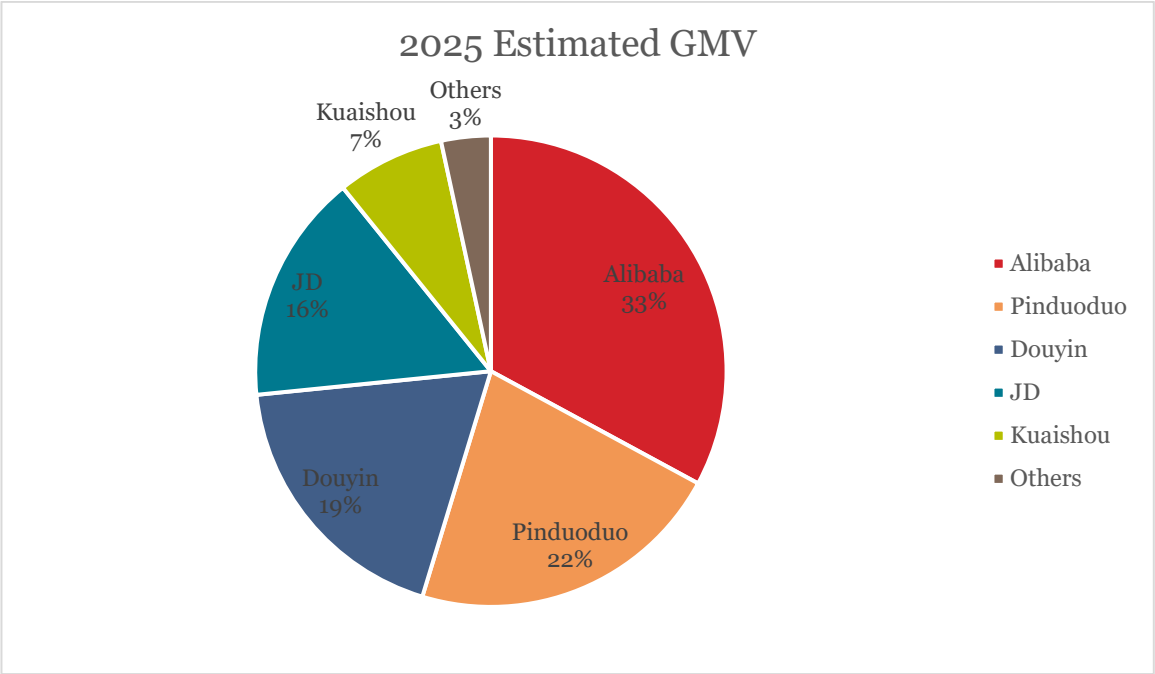
5.1.2. Instant Retail (On-Demand E-commerce)

Instant retail, defined by online ordering with local, near-immediate fulfilment, is becoming a major growth driver. It has evolved from an emergency-use case into a daily consumption behaviour, driven by speed, certainty, and convenience. Platforms such as Meituan and Alibaba's instant retail ecosystem, including Ele.me and related on-demand offerings, are expanding coverage into lower-tier cities and counties, making instant retail increasingly relevant beyond major urban centers.

5.1.3. Livestreaming E-commerce

Livestreaming has matured into a core sales format rather than a campaign-based tactic. It is now deeply embedded across platforms, supported by AI tools, virtual hosts, and data-driven merchandising. For brands, livestreaming functions as both a conversion accelerator and a long-term capability, requiring consistent operational planning rather than one-off activations. All the major social media and traditional e-commerce platforms mentioned above offer livestreaming e-commerce.

Graphic 2: E-commerce Market Share for Major Players 2025 (based on estimated GMV)



Source: SDICSI analysis based on company disclosures and media reports (36Kr, LatePost, Huxiu).

China's e-commerce landscape has entered a phase of structural rebalancing. While the market remains dominated by four major players, Alibaba's Taobao and Tmall (33%), Pinduoduo (22%), Douyin (19%) and JD (16%), the sources of growth are shifting. Traditional, shelf-based e-commerce platforms such as Alibaba and JD continue to hold significant scale, but their growth has moderated as consumer discovery increasingly takes place through content-driven and social channels. In contrast, Douyin has emerged as the fastest-growing platform by tightly integrating short-form video, livestreaming and in-app transactions, accelerating the rise of "social commerce" as a mainstream purchasing pathway.

As a result of this shift, established platforms are actively adapting their strategies. Both Alibaba and JD have stepped up investment in instant retail and on-demand fulfilment models, aiming to shorten delivery times and better match evolving consumer expectations around convenience and immediacy. Meituan, who have traditionally sold restaurant delivery are increasingly selling other consumer goods too. By 2025, instant retail had become a more central role in their ecosystems, complementing traditional marketplace models and responding to competitive pressure from social platforms that combine content, engagement and commerce in a single user journey. Together, these developments highlight a more dynamic and competitive e-commerce environment, in which platform differentiation is increasingly shaped by speed, content integration and service experience rather than scale alone.

While the chart above highlights the major e-commerce players that together account for almost all of the market share, it should be noted that China's digital ecosystem extends well beyond these platforms. This "long tail" of more specialised platforms and apps can offer targeted opportunities for Swiss companies with clearly defined audiences or niche propositions.

In particular, vertical or interest-based platforms, such as mother-and-baby, health, sports or lifestyle apps that include smaller e-commerce functions, may serve as effective complementary channels. When used selectively, these platforms can support campaign-based activations, partnerships or collaborations, helping brands reach highly relevant consumer segments while reinforcing their presence on the major e-commerce and social platforms.

5.2. SOCIAL MEDIA PLATFORMS: FROM AWARENESS TO TRANSACTION

5.2.1. WeChat and WeChat Channels

WeChat remains China's core "super-app," anchoring private traffic, CRM, and brand-owned ecosystems. WeChat Channels has emerged as a central growth engine, integrating short video, livestreaming, social

interaction, and in-app transactions. It should now be planned as a standalone strategic platform, particularly for brands seeking to connect public exposure with private-domain conversion.

5.2.2. Douyin (the Chinese counterpart to TikTok)

Douyin is the clear leader in short video and livestream-driven commerce, and the most mature example of "interest-based e-commerce." It plays a dual role as both a top-of-funnel discovery engine and a primary conversion channel, with content, algorithms, and transactions tightly integrated.

5.2.3. RED (Xiaohongshu)

RED remains a key lifestyle and inspiration platform, particularly influential for premium, imported, and design-led brands. Users actively seek authentic reviews and peer recommendations, making the platform especially important for brand credibility, consideration, and early-stage demand creation.

5.2.4. Other Relevant Platforms

QQ, owned by Tencent, is a messaging platform that currently requires limited attention from most Swiss companies. However, it is worth noting that younger consumer cohorts, including Generation Alpha, increasingly use QQ for social interaction in China.

Weibo is one of China's earliest social media platforms and is often compared to Twitter. Its relevance for foreign brand marketing has declined in recent years, particularly as effective use now requires sustained investment and active management.

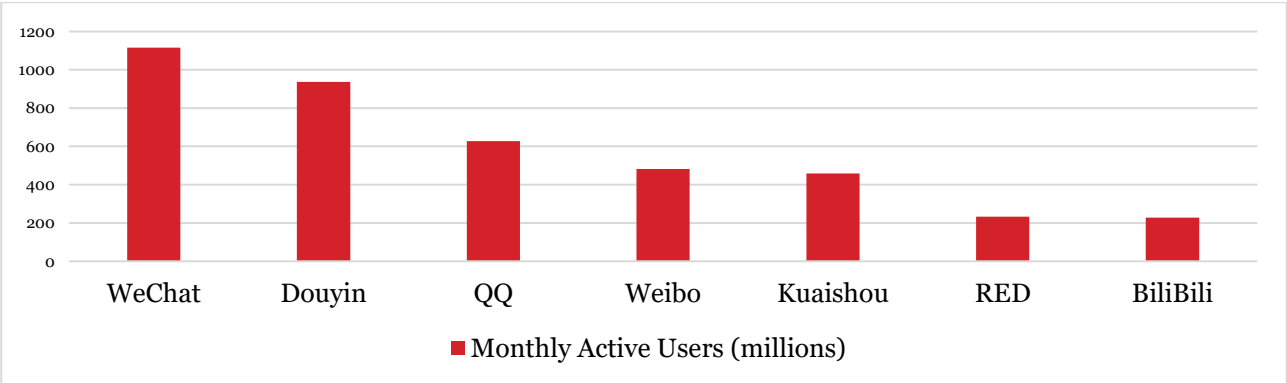
Kuaishou is a short-video platform with integrated e-commerce functionality, similar to Douyin, but it is generally more influential in lower-tier cities and among price-sensitive audiences.

BiliBili is a long-form, interest-based video platform with a young, highly engaged user base, making it most relevant for niche branding, education, and community-led storytelling rather than direct conversion.

Zhihu can also be relevant for categories that require education, comparison, or trust-building, as it functions more as a knowledge and Q&A platform than as a pure social channel.

For most Swiss companies, WeChat functions as the equivalent of an official Chinese website, while RED and Douyin are the primary platforms for near-term investment. BiliBili may be considered as a next step when targeting younger consumer segments.

Graphic 3: Social Media Rank by Monthly Active Users (Sep 2025)



Source: QuestMobile, data updated in 2025 September

6. Indicative Cost Frameworks for Digital Activation: E-commerce, Social Media and Information Platforms

Costs can vary significantly depending on a range of factors, including platform strategy, TP fee structures, product category, competitive intensity, and the level of activation required. The figures referenced in this section are aggregated benchmarks based on typical consumer goods brands operating across China's major e-commerce and social commerce platforms.

This section provides an indicative overview of expected costs for two broad scenarios: a very lean, entry-level presence as "Basic Presence" and a more established approach as "Mid-Market Performance". It should be noted that while leading platforms such as Tmall, JD, Douyin, and RED offer structured pathways for brand incubation, many smaller or niche platforms do not support low-investment entry models and generally require a more committed upfront approach.

Importantly, the "Basic Presence" cost level assumes a start-up mindset and a high degree of operational flexibility. In practice, it is difficult to execute this approach effectively without at least one locally based team member with strong Chinese market knowledge and cultural understanding. Several Swiss SMEs have successfully adopted a lean early-stage model by employing a local generalist to manage content localization, social media operations, influencer coordination, and day-to-day e-commerce execution. Compared with relying solely on external agencies or establishing a legal entity with a full local team, this approach can offer greater agility and cost efficiency in the initial market entry phase.

As establishing a legal entity in China can be time-consuming and resource-intensive, many SMEs initially work with partners offering "China General Manager" services or with TPs that can employ staff on the brand's behalf, with the option to internalize the role over time. Beyond platform operations, having a local representative on the ground can also support broader business development and partnership opportunities.

Alternative, lower-involvement models, such as working with a distributor who manages platforms, sub-distributors, and service partners, remain a viable option for some companies. As with any market, this approach involves trade-offs in terms of control, visibility, and long-term brand building.

Of the three approaches under "Basic Presence", employing a locally based team member offers the greatest operational efficiency and brand control but requires the most resources. Engaging a local partner or TP to fulfill the "China General Manager" role is a more cost-effective and flexible alternative that still allows for some operational oversight. The lowest management burden and cost are associated with working with a distributor or general agent, but this option limits direct control over brand strategy, platform operations, and long-term brand development.

Table 2: Annual Cost on E-commerce Platforms
The costs mainly reflect the operational (service fees, commissions, logistics, etc.) and marketing expenses of online stores. A Basic Presence functions as a small or individual store, if supported, while the Mid-Market model corresponds to a brand flagship store.

	Annual Cost (in CHF and % of GMV (Gross Merchandise Value))	
E-commerce Platforms	**Basic Presence**	**Mid-Market Performance**
Tmall Global (CBEC)	10,000 + 50% GMV	150,000 + 20-50% GMV
JD Worldwide (CBEC)	20,000 + 40% GMV	75,000 + 30% GMV
Domestic Tmall & JD	N/A	Largely like CBEC

	Annual Cost (in CHF and % of GMV (Gross Merchandise Value))	
E-commerce Platforms	**Basic Presence**	**Mid-Market Performance**
VIP	N/A	20,000 + 10% GMV
Douyin	65,000 + 15% GMV	260,000 + 5% GMV
WeChat	650 + 1% GMV	13,000 + 1% GMV
RED	6,500 + 15% GMV	36,000 + 15% GMV

Source: Official info from respective platform, China Skinny

Table 3: Annual Cost on Social Media
A Basic Presence includes account setup and verification, and monthly maintenance by a freelancer. The Mid-Market level involves a service fee from a marketing agency and a dedicated annual campaign budget.

	Guideline Annual Cost (in CHF)	
Social Media Platforms	**Basic Presence**	**Mid-Market Performance**
WeChat	3,000+	70,000+
RED	8,500+	42,000+
Douyin	1,300+	42,000+
Weibo	3,000+	25,000+
BiliBili	900+	25,000+
Kuaishou	1,500+	30,000+

Source: Official info from respective platforms, China Skinny

Table 4: Annual Cost on Information Platforms
A Basic Presence typically includes one-off account setup and verification, and initial posting, which is managed by a freelancer. In contrast, Mid-Market performance involves regular (usually monthly) updates by a professional agency and is often supported by a marketing budget.

	Guideline Annual Cost (in CHF)	
Information Platforms	**Basic Presence**	**Mid-Market Performance**
Zhihu	350+	7,500+
Baidu	350+	16,000+
Website	500+	5,000+

Source: China Skinny

In China, consumers typically make decisions in a non-linear, platform-led way. This requires brands to have a presence across multiple connected touchpoints rather than relying on a single channel. E-commerce platforms, social media, and information platforms each play distinct roles in the discovery, consideration, trust-building, and conversion processes. The key takeaway for Swiss SMEs is not to maximize investment across all platforms at once but rather to design a coordinated, phased platform presence that aligns with the Chinese consumer journey. In practice, this often means

starting with one core e-commerce platform (e.g., Tmall or JD) and one or two foundational social platforms (e.g., WeChat for brand communication and community management or RED/Douyin for discovery and content-driven engagement). The specific combination of platforms should be determined by the brand's category, positioning, and target audience. Additional platforms should be introduced progressively as brand awareness and operational capacity grow.

7. Key Marketing Activation Models: Influencers and Livestreaming

Once social media and e-commerce platforms are established, the focus shifts to activation, using these channels to build awareness and support sales. In China, influencers and livestreaming play a central role in this process and should be considered core components of any digital strategy.

China's livestreaming e-commerce sector is a major driver of consumption growth, having expanded more than 12-fold between 2019 and 2024 and contributing approximately 80% of new e-commerce growth. By the end of 2025, the sector's total GMV reached approximately RMB 6.5 trillion (roughly CHF 812 billion), accounting for nearly one-third of China's online retail sales, and its user base surpassed 660 million. (*Source: TechNode & Syntun Market Intelligence, 2025*). For Swiss SMEs, this highlights the importance of planning for content-led commerce rather than relying solely on traditional product listings.

At a **basic presence** level, brands can focus on low-cost, low-frequency livestreams hosted by Chinese-speaking staff or local partners, alongside selective collaboration with smaller influencers to build initial awareness and test market response. This approach prioritizes learning, consistency, and controlled risk.

At a **mid-market performance** level, activation becomes more structured. Brands typically adopt regular livestreaming programs, combine brand-building and sales-focused sessions, and deploy more targeted influencer strategies aligned with category dynamics. Deeper collaborations, including private-traffic influencers, support long-term brand credibility and follower growth.

Overall, for Swiss SMEs, success lies in coordinating multiple digital touchpoints, i.e., social media, livestreams, and e-commerce, along the Chinese consumer journey. A phased, locally supported approach allows brands to manage risk while progressively building visibility, trust, and commercial traction.

7.1. INFLUENCER ECOSYSTEM: ROLES, TIERS, AND COST BENCHMARKS

Given the different platform characteristics, user profiles, and audience scale of RED and Douyin, the industry applies different influencer tiering standards and follower thresholds for each platform. The commonly used classification criteria are as follows:

Table 5: Typical Tiers of Influencers on RED and Douyin by Number of Followers

Influencer Level	RED	Douyin
Top-tier influencers	Over 500K	Over 5 million
Mid-tier influencers/Upper-mid (Douyin)	50K-500K	1-5 million
Entry-level influencer/Mid-tier (Douyin)	5K-50K	100K-1 million
KOCs/Emerging influencers (Douyin)	Under 5K	Under 100K

Source: China Skinny

7.1.1. KOCs and Emerging Influencers

Often referred to as Key Opinion Consumers (KOCs) or Su Ren on RED, and Emerging Influencers on Douyin, these grassroots creators are effective for building early-stage awareness and a base of authentic, credible reviews as consumers begin to search for or encounter a brand.

As a reference, a KOC with under 5K followers on RED typically charges CHF 50–100 per post collaboration including image-text post and video. On Douyin, an emerging influencer with under 100K followers usually charges CHF 250–1,200 for a short video.

7.1.2. Entry-level and Mid-Tier Influencers

This tier is now the sweet spot for SMEs, offering a balance of reach, cost efficiency, and measurable ROI when collaborations are well planned.

On RED, entry-level influencers with 5K–50K followers typically charge CHF 250–500 per post, whether in image-text or video format. On Douyin, mid-tier influencers with 100K–1 million followers usually cost CHF 700–4,600 per video.

At this stage, brands can begin building longer-term relationships with creators who genuinely like the product and can become reliable, trusted advocates.

7.1.3. Mid-tier and Upper-mid Influencers

Collaborations at this level are usually sales-driven and require clearer performance targets and more preparation. Influencers are expected to include purchase links, sell through their own stores, or promote via commission-based models.

Pricing varies significantly depending on not just follower count, but also audience quality and content performance. On RED, costs for content typically range from CHF 1,200 to 3,000. On Douyin, upper-mid influencers generally charge CHF 2,000–20,000 for just content. If sales are required, commission is around 30%.

7.1.4. Top-tier Influencers

Top-tier influencers are best reserved for major campaigns or key shopping festivals, when maximum exposure is required. Pricing typically increases during peak periods.

Sales-focused collaborations, via livestreaming, store hosting, or direct purchase links, often include a 20%–30% sales commission, with fees depending on the influencer's level of involvement and confidence in the brand. On RED, top-tier influencers typically charge CHF 5,600–30,000 per content collaboration. On Douyin, influencers with 10 million+ followers usually charge CHF 17,000–40,000 per video.

Overall, influencer rates have declined compared to previous years due to increased competition and the growing use of AI-driven content creation, even as performance expectations continue to rise.

7.2. LIVESTREAMING AS A COMMERCIAL TOOL

7.2.1. The Rise of Brand-Owned Livestreaming

Brand-owned livestreaming, also referred to as store livestreaming, is becoming a core pillar of China's digital commerce ecosystem. With the rapid adoption of AI-assisted and AI-hosted livestreaming, both production and operating costs are falling sharply, making this format more accessible and scalable for brands.

As a result, brands are shifting part of their budgets away from purely paid influencer livestreams toward always-on, brand-controlled livestreaming, which supports branding, education, trust-building, and increasingly, direct sales. This is an area where Swiss SMEs should pay closer attention.

Table 6: Indicative Costs Comparison for Traditional Livestreaming vs AI Livestreaming

ITEM	Traditional Livestreaming	AI Livestreaming
Equipment/Setup	CHF 3,750-6,250	CHF 625
Monthly Staffing	CHF 3,750	CHF 450-625

Source: China Skinny

With AI handling hosting (an AI generated virtual host), scripting, and repetitive Q&A, brand-owned livestreaming is no longer resource-heavy and can run daily at low marginal cost.

7.2.2. Strategic Applications of Livestreaming

Rather than viewing livestreaming as a single tactic, it is more effective to think in terms of three distinct strategic formats:

1. Daily Brand-Owned Livestreaming (Store Livestreaming)

This is an always-on format primarily used for branding, awareness, product education, and live Q&A. It is also increasingly used for conversion as consumers become more comfortable with purchasing directly in-stream. AI-powered livestreaming allows brands to maintain a continuous presence without a large team, which makes it ideal for health and supplement categories, where education and trust are critical.

2. Brand-Owned Campaign Livestreaming (e.g. “In-Switzerland” Livestreams)

These livestreams are campaign-driven and focus on brand storytelling, such as origin, traceability, production transparency, and scientific credibility. Examples include livestreams from Switzerland showcasing manufacturing standards, ingredient sourcing, or quality control; these are strong tools for reinforcing premium positioning and trust.

3. Paid Influencer Livestreaming (Festival & Campaign-Driven)

Paid influencer livestreaming is still effective for major shopping festivals and campaign peaks, where traffic is highly concentrated and rapid scale is needed. Fixed fees have softened compared with previous years, but this format remains a significant investment for SMEs once commissions are included.

As a result, brands are using influencer livestreams more selectively and mainly for peak moments. For ongoing engagement, education, and more cost-efficient sales, brand-owned (store) livestreaming, especially with AI support, should be the primary focus for SMEs.

To summarize, China’s influencer economy is shifting toward “lower rates, higher total investment.” Brands are moving away from heavy reliance on top-tier KOLs and increasingly prioritizing cost-efficient mid-tier KOLs and KOCs, complemented by lower-cost formats such as brand-run livestreaming.

At the same time, fragmented consumer attention and rising performance expectations mean brands must invest more overall, focusing on measurable results and emotionally resonant content to engage Gen Z and young professionals. The market has moved from broad, top-heavy exposure to more refined, performance-driven influencer portfolios built for long-term efficiency and growth.

8. Category-Specific Strategic Guidance for Swiss Companies

Drawing on project experience with global companies, complemented by expert interviews, social listening, and continuous monitoring of Chinese consumer behavior across key digital platforms, the following strategic guidance highlights where Swiss brands can compete effectively and build sustainable relevance in China.

Across categories, several cross-cutting themes consistently emerge: the growing influence of AI-powered search and recommendation, the increasing importance of experience- and emotion-led marketing, and the strong appeal of nature, wellness, and outdoor-oriented lifestyles, areas that align closely with Switzerland's country image and brand strengths.

8.1. HEALTH SUPPLEMENTS

- Health supplements remain a dynamic and attractive category in China, underpinned by strong consumer belief in Traditional Chinese Medicine (TCM) and preventative health. Swiss brands should be aware that certain ingredients may be perceived differently in China than in Western markets, and that health routines and usage occasions can vary significantly.

- Regulatory complexity remains a key barrier in China. Because full domestic registration is prohibitively costly and prolonged, brands like Swiss register only a few hero SKUs locally, utilizing CBEC for the rest. While the CBEC framework exempts eligible products from formal domestic registration, regulators are tightening oversight to crack down on misrepresented or non-compliant "pseudo-imports." Nevertheless, for genuine overseas manufacturers, CBEC continues to lower entry barriers for new Swiss brands, leveraging Chinese consumers' high familiarity with the model.

- Marketing claims are also tightly regulated. Swiss companies must conduct thorough due diligence on packaging and communications. While influencers are sometimes used to communicate softer benefits, this area is increasingly scrutinized and should be approached cautiously.

- RED plays a central role in this category. It is a primary destination for supplement education, peer reviews, and lifestyle-driven health discussions. Increasingly, AI-powered search and summarized Q&A features on RED, WeChat, and AI-native platforms such as Doubao and DeepSeek amplify category-level awareness, particularly for supplements linked to skin health, immunity, sleep, and stress management.

- Trust is critical. Chinese consumers frequently compare product labels and packaging across markets. Swiss brands must ensure consistency between their China offering and their domestic or European portfolio to avoid authenticity concerns.

8.2. SKINCARE

- Regulatory requirements remain a key consideration. While animal-testing requirements have eased in recent years, practical requirements still vary by product classification, route to market, and supporting documentation. Many foreign brands therefore continue to prioritize CBEC to reduce compliance risk and speed up market entry.

- Competition has intensified significantly. Over the past five years, Chinese domestic skincare brands have made major advances in formulation, storytelling, packaging and localization. Swiss brands must clearly demonstrate relevance to Chinese skin needs, often supported by local testing data, testimonials, or dermatologist-endorsed content.

- Traditional paid advertising is costly and highly competitive. For Swiss SMEs, building authentic awareness is essential. RED remains the single most important platform for discovery, education, and credibility-building. WeChat Channels is also emerging as a relevant supplementary platform. If marketing budgets are limited, investment should be concentrated on RED and a major e-commerce platform like Tmall or JD to close the deal.

- AI-powered content discovery is increasingly influential. RED's AI summarisation and search features mean that well-structured reviews, educational posts, and before-and-after content can continue to generate visibility long after initial publication, making high-quality seeding especially valuable.

- This is also a category where experience and emotional marketing matter. Stories around skin sensitivity, alpine purity, clinical precision, and daily rituals resonate more strongly than purely functional claims.

8.3. DAIRY PRODUCTS

- China's dairy market is increasingly aligned with Western consumption patterns, though preferences still vary by region and age group. Government dietary guidelines continue to encourage dairy intake, supporting long-term category growth.

- In 2025, China imported 2.66 million tons of dairy products, up 1.6% year-on-year, with total import value reaching USD 12.78 billion (CHF 11.22 billion) (*China Dairy Association*). By category, cheese, whey products, and butter recorded growth of over 10%, while infant formula and yoghurt saw modest increases. Most other categories declined, including bulk milk powder (-0.3%), protein products and cream (around -8%), and packaged milk and condensed milk (over -10%). Notably, whey products surpassed bulk milk powder to become the largest dairy import category by volume (*Dairy Economic Review, January 2026*).

- Freshness and convenience are key drivers. Larger milk formats are dominated by imported brands, while single-serve and on-the-go products perform particularly well among younger consumers, supported by the rapid expansion of instant retail channels.

- Milk powder and infant formula remain major categories, with strong opportunities for sub-segmentation, such as functional milk powders targeting students, professionals, or seniors.

- Cheese, butter, and whey protein are still relatively small but fast-growing segments. While local brands are emerging, Swiss and European producers continue to hold an advantage in perceived quality, expertise, and heritage.

- From a channel perspective, an O2O (online-to-offline) strategy is often effective. In addition to digital platforms, tastings, sampling, and in-store education, supported by distributors/local partners, help translate awareness into trial.

8.4. OUTDOOR AND FUNCTIONAL FASHION

- Outdoor fashion is an emerging lifestyle-driven segment in China, closely aligned with broader health, wellness, and outdoor activity and sports trends, particularly among younger and premium consumers.

- Foreign brands are particularly well received in this category. Six years ago, none had annual sales exceeding USD 500 million (CHF 400 million). Now, there are six such brands, spanning Europe, North America, and Asia.

- RED and Douyin are the most relevant platforms for this category, combining inspiration-led content with livestreaming and social commerce functions that support both brand storytelling and conversion.

- Aesthetic cues such as European or minimalist design, a “chill” lifestyle, and a strong connection to nature resonate strongly with Chinese consumers and align well with Switzerland’s country image.

- Product narratives that link nature and outdoor performance with technology, functionality, and quality craftsmanship are especially effective in differentiating Swiss brands in this fast-growing segment.

- While the category is relatively less competitive than fast fashion, it attracts consumers who value individualism, design, and premium positioning, making it well-suited for targeted, content-led market entry strategies rather than mass-market approaches.

8.5. INSIGHTS FROM SWISS BRANDS’ DIGITAL PERFORMANCE IN CHINA

- A common and effective foundation strategy combines an e-commerce platform such as Tmall or JD with WeChat, RED, and Douyin for awareness, engagement, and conversion.

- Flagship stores on Tmall and JD provide valuable consumer data and insight tools. The ability to interpret these signals and translate them quickly into content, messaging, and product positioning is a key success factor.

- Swiss brands consistently perform well when emphasizing scientific credibility, precision, and professionalism—for example through lab results, university collaborations, controlled production environments, and expert or professional influencers.

- Cultural localization is critical. Successful brands adapt content to Chinese festivals, seasonal moments, and social contexts, rather than directly replicating global or home-market campaigns. Failure to localize is one of the most common reasons for underperformance.

- Customer service expectations are high. Chinese consumers expect fast, near-24/7 responses and clear after-sales support, particularly when engaging with new or imported brands.

- Budget discipline is essential. Lower budgets require realistic expectations and long-term consistency. A smaller but stable presence is more effective than short-term market entry followed by withdrawal.

8.6. STRATEGIC TAKEAWAYS FOR SWISS COMPANIES

Across categories, AI-driven discovery, social commerce, and emotional storytelling are reshaping how Chinese consumers learn about and evaluate brands. Categories such as health, skincare, dairy, and outdoor or lifestyle-oriented products increasingly benefit from content that links nature, wellbeing, and lived experience, areas where Switzerland has strong and credible associations.

Swiss brands that succeed in China tend to move beyond transactional marketing, focusing instead on experience-led narratives, long-term trust-building, and consistent multi-platform presence aligned with the Chinese consumer journey.

9. Conclusion

This report highlights the complexity and opportunity of China's digital ecosystem for Swiss SMEs. Beyond platforms and tactics, success in China requires clear strategic intent, realistic expectations, a reasonable budget plan, and a willingness to adapt to one of the world's fastest-moving consumer markets. This concluding section distils the broader lessons emerging from the report and frames how Swiss companies should think about entering, testing, and scaling in China.

9.1. SUMMARY OF KEY POINTS

- **Start with category clarity and ambition**. A solid understanding of category dynamics and a clearly defined objective are essential. These decisions should determine not only budget levels, but also channel selection, partnership models, and the pace of market entry.

- **Expect to rely on local partners in the early stages**. Whether through agencies, distributors, or local staff, on-the-ground expertise is critical. For companies seeking faster traction, having Chinese-language and market-facing capabilities, either internally or via partners, is often a necessity rather than a choice.

- **Prepare for speed, intensity, and competition**. China's digital platforms evolve rapidly, and domestic brands are increasingly sophisticated and agile. Swiss SMEs must assess their own decision-making speed and execution capacity before committing to aggressive growth targets.

- **Focus beats fragmentation**. Most brands perform best with one to two e-commerce touchpoints and a focused presence on two to three core social platforms. Chinese consumers are highly research-driven, particularly for premium, health-related, or unfamiliar brands, making consistency and depth of content more important than broad but shallow coverage.

- **Activation requires localization**. Livestreaming, influencer collaborations, co-branding, and content linked to local festivals or moments are no longer optional for brands seeking scale. Swiss companies should be realistic about which of these capabilities they can manage internally and where external support is required.

- **Entry does not have to be expensive, but expectations must match investment**. There are multiple ways to establish an initial presence with controlled budgets. However, sustainable performance comes from continuity and learning over time, not short-term experimentation followed by rapid exit.

9.2. FINAL THOUGHTS

China offers meaningful growth potential for Swiss SMEs, particularly in categories aligned with health, quality, nature, and lifestyle. A "basic presence" can serve as a practical starting point, enabling brands to test the market, build credibility, and generate early signals. However, long-term success depends on a well-defined strategy, disciplined investment, and a clear understanding that China rewards patience, localization, and sustained commitment. Without these, costs can escalate quickly and opportunities can be missed.

10. Appendix A - Compliance & Legal Risk Checklist (non-exhaustive)

Advertising & Claims: avoid prohibited medical/health claims; substantiation files for performance statements.

Category Rules: cosmetics / food / supplements may require filings/registrations depending on route-to-market.

Labeling & Language: confirm Chinese label requirements (CBEC vs domestic differs) and mandatory disclosures.

Data & Privacy: customer data processing, consent flows, cross-border transfer considerations, and vendor access.

IP & Brand Protection: trademarks (China), anti-counterfeit monitoring, and platform takedown process.

Important: This checklist is informational only and is not legal advice. Engage qualified PRC counsel/regulatory specialists for product- and claim-specific review.

11. Appendix B – Glossary

TERM	Definition
AI (Artificial Intelligence)	Computer systems designed to perform tasks that normally require human intelligence, such as data analysis, prediction, and automated decision-making.
CBEC (Cross-Border E-Commerce)	Online retail transactions in which consumers purchase products directly from overseas sellers through digital platforms supported by cross-border logistics and regulatory frameworks.
CRM (Customer Relationship Management)	Systems and processes used by organizations to manage customer data, interactions, and relationships across the customer lifecycle.
GEO (Generative Engine Optimization)	The practice of optimizing digital content to improve brand visibility within AI-driven search and generative answer engines.
GMV (Gross Merchandise Value)	The total monetary value of goods sold through an e-commerce platform over a defined period.
JD (Jingdong)	**JD.com**, a leading Chinese e-commerce platform known for its direct retail model and nationwide logistics network.
KOC (Key Opinion Consumer)	Consumers with smaller but trusted social networks who influence purchasing decisions through authentic product experiences and peer recommendations.
KOL (Key Opinion Leader)	Influential individuals, typically on digital platforms, who shape consumer perceptions and purchasing behavior through content and endorsements.
O2O (Online-to-Offline)	A business model that integrates online engagement or transactions with offline consumption or service fulfilment.
QQ	An instant messaging and social platform developed by **Tencent**, widely used in China for communication and online communities.
RED (Xiaohongshu)	**Xiaohongshu**, a Chinese social commerce platform where users share lifestyle content, product reviews, and shopping recommendations.
SEO (Search Engine Optimization)	The process of improving website visibility and ranking on search engine results pages through content and technical optimization.
SKU (Stock Keeping Unit)	A unique identifier assigned to a specific product or product variant for inventory and sales tracking.
TCM (Traditional Chinese Medicine)	A traditional healthcare system originating in China that includes herbal medicine, acupuncture, and holistic therapeutic practices.
TP (Tmall/Taobao Partner)	A certified third-party service provider that supports brands operating on Chinese e-commerce marketplaces with store management, marketing, and operational services.

12. Support and Contact

Navigate China's complex regulatory and digital landscape with confidence. Whether you need a comprehensive market entry strategy, including route-to-market choices, platform priorities, and logistics and e-commerce partner setups, or targeted support for specific legal issues, S-GE and the Swiss Business Hub China will tailor our services to your exact needs. Our renowned experts in Switzerland work seamlessly with our Embassy specialists to provide you with the firsthand, actionable intelligence required to ensure your expansion plan is focused, measurable, and realistic from day one.

Take the initiative to unlock your business's potential in China. Contact us today to define the scope of your support and embark on your journey toward successful international growth.

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