

The Rise of Chinese Brands in Southeast Asia

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Table of Contents

EXECUTIVE SUMMARY

Why read this report? Key findings

INTRODUCTION

Southeast Asia is a high growth region of 10 countries with a population over 650 million Chinese brands are at different growth stages in Southeast Asia

Our industry experts on the growth potential of Chinese brands in the region

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WHY ARE CHINESE BRANDS FOCUSING ON SOUTHEAST ASIA?

Southeast Asia continues to be a focus of companies looking for growth Southeast Asia is the largest and fastest-growing export region for China Cross-border e-commerce gives increased access to Chinese brands Chinese exports need new markets in the face of increasing US tariffs

OPPORTUNITIES IN SOUTHEAST ASIA FOR CHINESE BRANDS

Southeast Asia's under-40 demographic profile is compelling
Success in SEA hinges on adapting to urbanisation, digital payments, and localisation
The changing perception of Chinese brands facilitates their growing acceptance
Globally, Chinese brands are moving up the premiumisation ladder
In Southeast Asia, Chinese brands are no longer just "good for the price"

GROWTH OPPORTUNITIES IN SELECTED SECTORS IN SOUTHEAST ASIA

From appliances to beauty: The varying success of Chinese brands in Southeast Asia Chinese brands tend to succeed where localisation barriers are low However, brands tend to struggle for acceptance where cultural nuances matter

CONSUMER APPLIANCES

From Japan to China: The changing landscape of Southeast Asia's appliances market Chinese brand shares grow, usually at the expense of Japanese brands

Gree is a success story in Indonesia through its innovative services and marketing

LG launches its "Rent-Up" programme as part of its strategy to defend market position

Moving forward: Chinese brands will continue their march towards market leadership

BEAUTY AND PERSONAL CARE

The Chinese beauty boom: Affordable brands are conquering Southeast Asia Why does the "China experience" work in Southeast Asia?

Focallure's rapid growth: A case study in cross-border beauty success (1)

Focallure's rapid growth: A case study in cross-border beauty success (2)

Moving forward: How do established beauty players defend their market shares?

CONSUMER FOODSERVICE

Brewing ambitions: The rise of Chinese coffee and tea shops in Southeast Asia
Chinese brands rapidly expand outlets in Southeast Asia to capture market share
Competitive pricing and product innovation key to capture local consumers
Moving forward: Blending global ambition and hyper-local relevance is key to success

PET CARE

Fetching new markets: China's pet brands sniff out Southeast Asia Southeast Asia: The next big bowl

Case study: Kaniva displaces incumbents and gains category prominence

Affordable premium: Kaniva's strategy for dominating Thailand's pet food scene

Moving forward: Pet parent insights crucial to lead an emotionally driven category

PACKAGED FOOD

Taking a bite of Southeast Asia's F&B market: A beacon of hope for Chinese firms
Localisation is essential, whether through solo market entry or M&A
Mengniu and Yili's acquisitions in ice cream fast-track their penetration into SEA
Case study: Yili displays thorough localisation strategies in Indonesia
Moving forward: Affordable indulgence in high-growth categories is the way into SEA

DIGITAL WALLET PAYMENT

Ecosystem partnerships redefine rapidly evolving digital payment landscape

The limits of expansion: Why Chinese wallets struggle to establish a foothold

Ant International's glocalisation: Leverage equity investment to gain market leadership

Central bank initiatives and local rivals: The dual challenge to AliPay+'s continued rise

Moving forward: Drive penetration in key verticals of everyday life to gain leadership

CONCLUSION

Opportunities in Southeast Asia – why brand agility trumps heritage in the region Appliance and foodservice brands expected to move towards market leadership by 2030 Opportunities for growth in Southeast Asia (1) Opportunities for growth in Southeast Asia (2) Evolution of Chinese companies in Southeast Asia How should Chinese companies entering SEA respond to these challenges?

About Euromonitor International

How should established companies in SEA respond to these challenges?

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