



The **Global Voice** Of **CX**

ASEAN Macro Economic Outlook: A Growing Powerhub of Global Manufacturing



36 Months · 35 Countries · 4 Industrial Sectors

The Global Voice(s) Of CX

CX Experiences

McDonald's, FedEx, Wells Fargo, AT&T

Global Community

A global audience of 350,000 CX executives

1 Million Views per Month

YouTube nano documentaries and host of podcast 'CX in the Wild.'

USA

South Africa

Dubai

India

South Korea

Germany

Japan

China

France

Portugal

England

Philippines

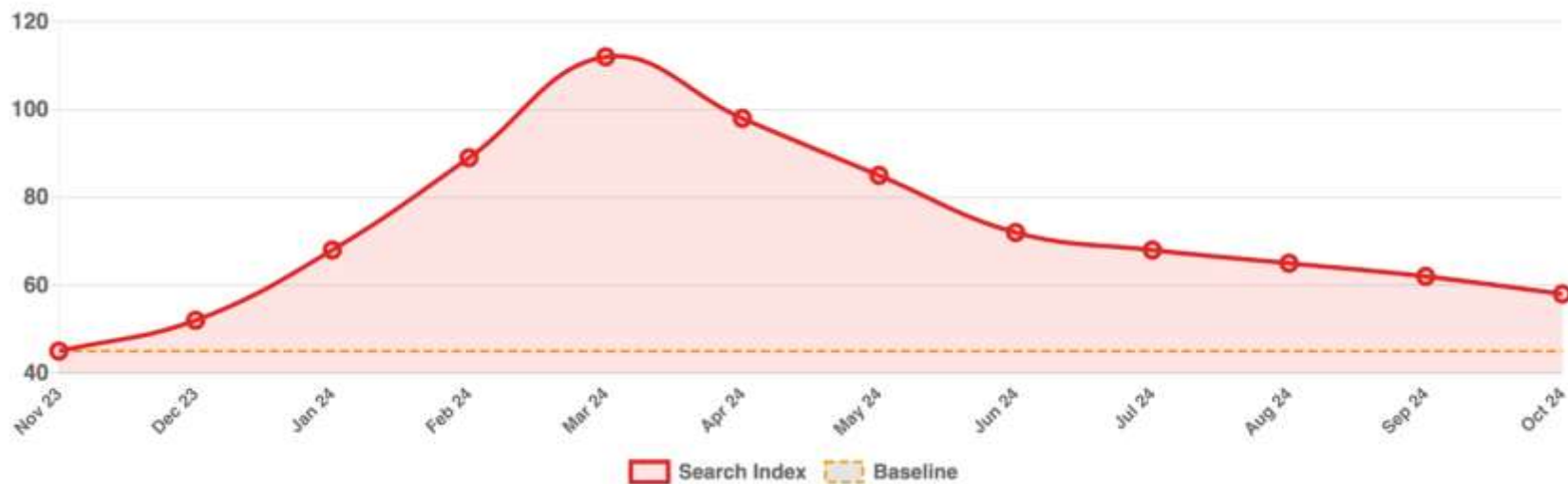
DENNIS WAKABAYSHI

**2025
WORLD TOUR**

In the circular economy
Consumer Behavior Drives Everything

Consumer Complaints on Social Media Force Brands to Change Suppliers Within Weeks

450M Chinese Households Complained About Contamination, P&G Changed Suppliers in 60 Days



This is how consumer behavior becomes procurement policy.

Social Media Complaints Become Supplier Requirements Within 30 Days

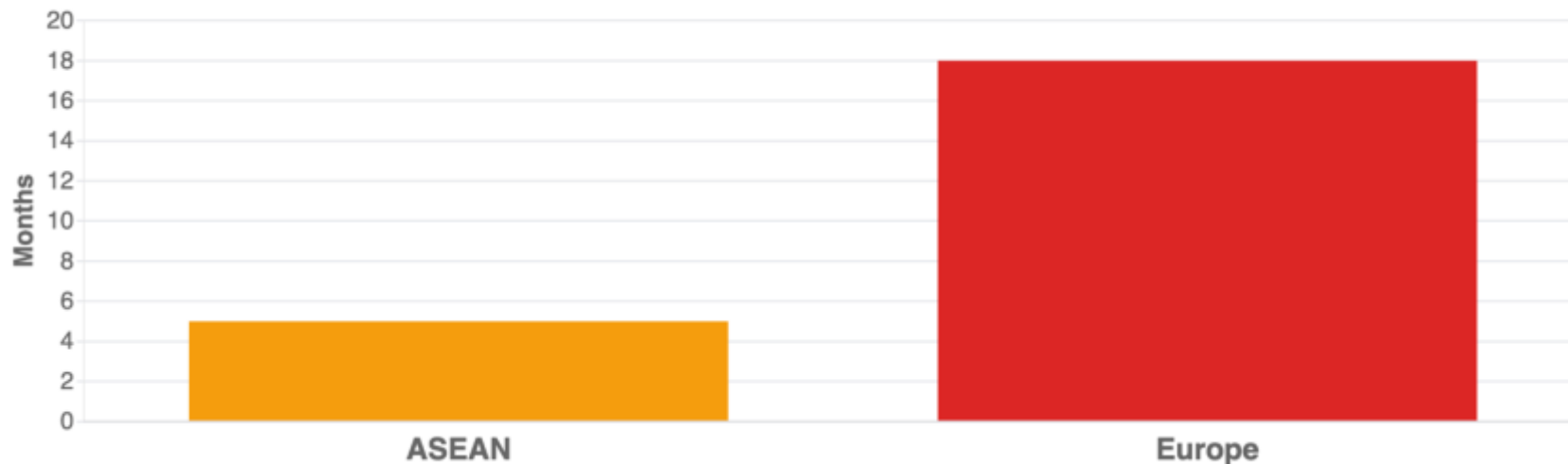
Consumer Concern Peaked in March, Brands Changed Supplier Technical Requirements in April



Brands now monitor consumer complaints in real-time and translate them directly into new technical specifications for mills. **The 30-day window from complaint to requirement change is the new procurement reality.**

ASEAN Factories Respond to Customer Feedback Three Times Faster Than European Factories

Consumer Signal to Factory Investment: **ASEAN 5 Months, Europe 18 Months**



ASEAN mills commit capital within 5 months of brand specification changes. European mills require 18 months for feasibility studies, approvals, and implementation. This 13-month speed gap determines which suppliers win new business when consumer preferences shift.

38 Days vs. 210 Days: Why ASEAN Suppliers Can Test, Fail, and Still Win

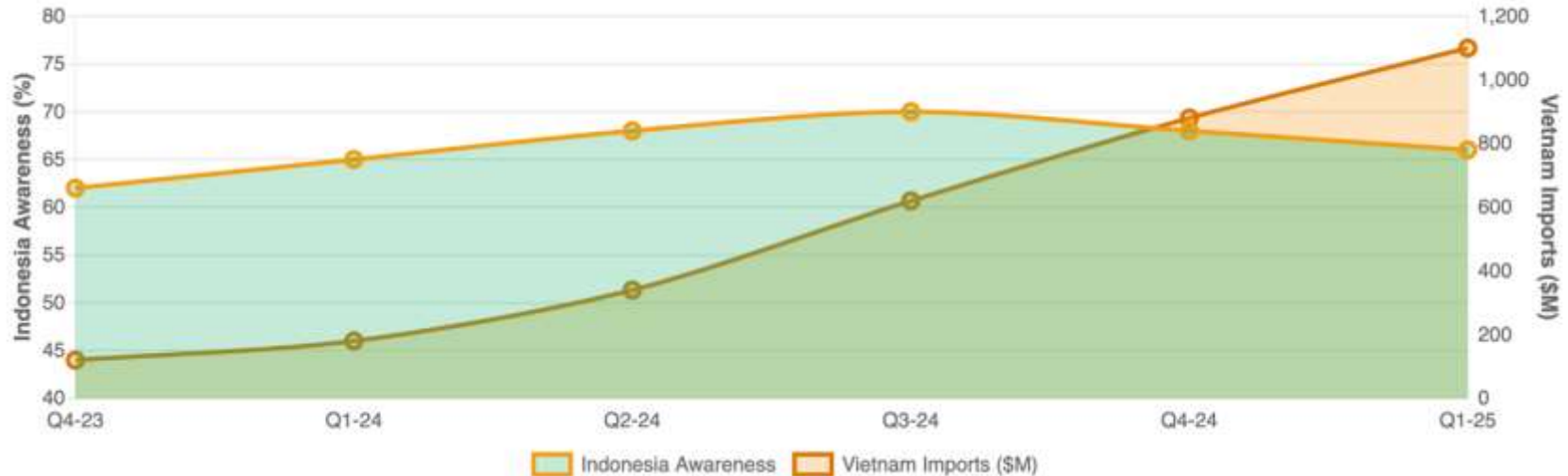
Western Markets are 4x slower at innovation than ASEAN Companies



Faster customer forgiveness allows ASEAN suppliers to test, fail, and adapt without permanently losing business.
Western suppliers face 5x longer recovery cycles, making innovation attempts commercially dangerous.

One Country's Consumer Maturity Creates Another's Import Demand

When Indonesian Shoppers Buy Certified Products, Vietnamese Shoppers Want the Same Thing Four Months Later



When Indonesia adopts sustainable products, Vietnam's middle class buys them four months later to signal the same status.

Consumer trends cross borders faster than products do.

Trends Reach **82%** Penetration in **4 Months**, Supply Takes 12 Months



What Shoppers Want in One Country Spreads to Neighboring Countries Faster Than Products Can Ship



Trending Changes

ASEAN Currently Outperforms Every Global Region on Metrics That Drive Manufacturing Investment

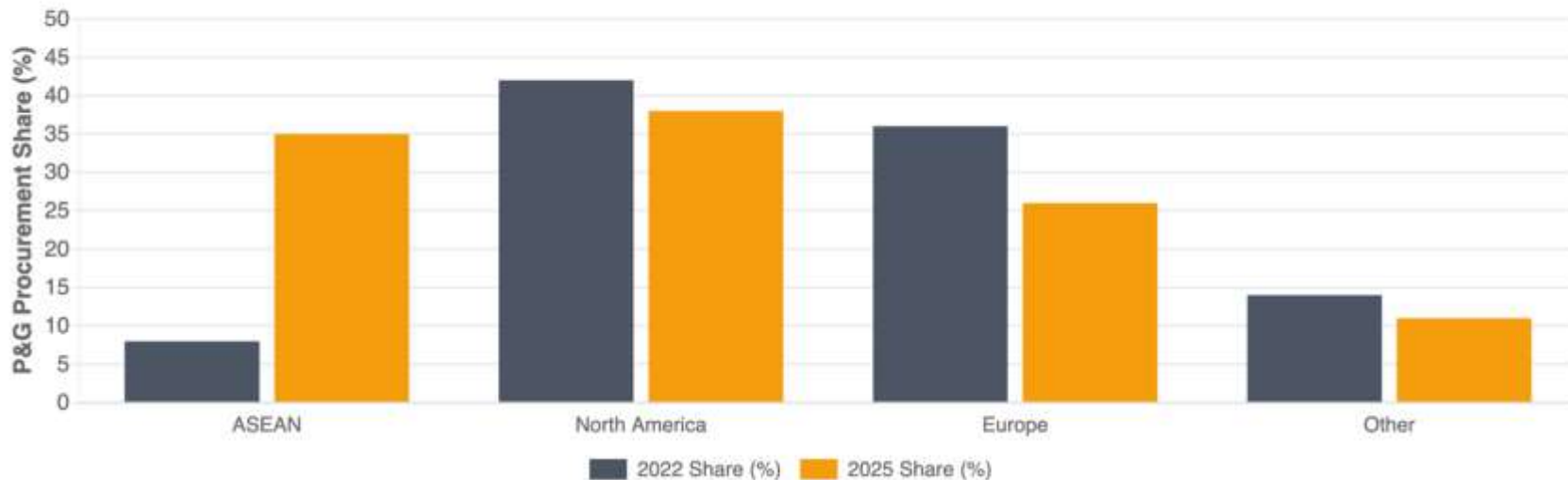
Customer Forgiveness · Regulatory Speed · Supply Response · Manufacturing Growth



Brands choose suppliers in regions where customers forgive mistakes fast, regulations adapt quickly, and factories respond within months.

CASE STUDY: P&G Restructured Its Global Supplier Base in Response to Consumer Demands

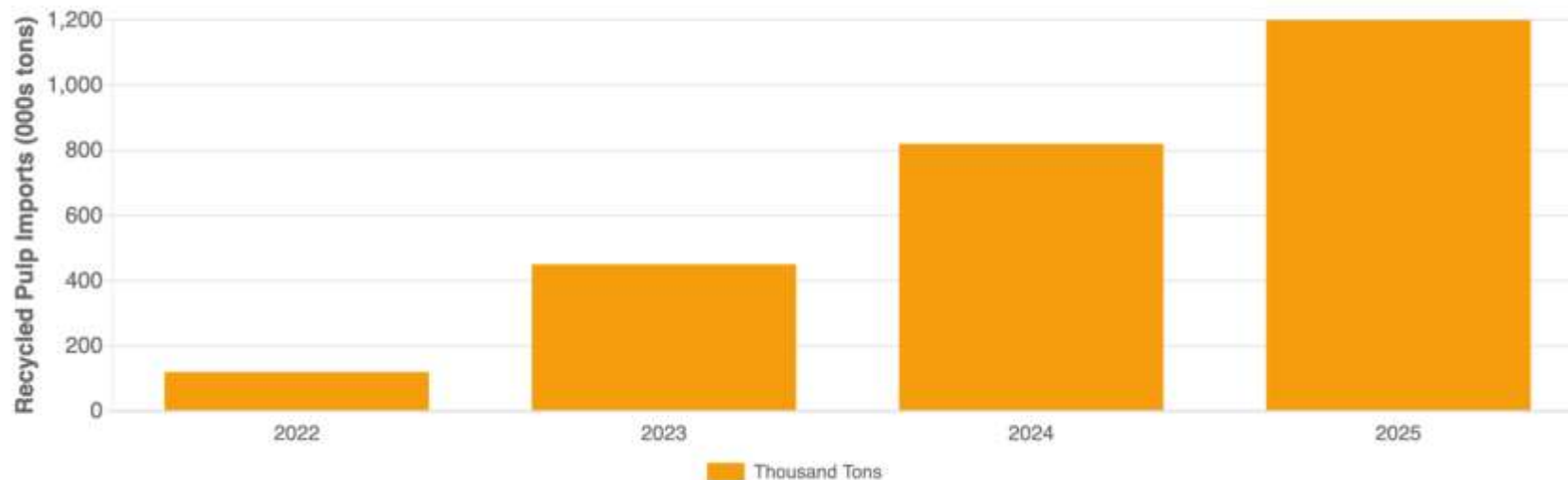
ASEAN Grew from **8% to 35%** While Europe and North America Lost Share



When procurement shifts 27 percentage points in 3 years, **supply chains reorganize permanently around the new geography.**

When one door closes, another opens:

When China Banned One Type of Recycled Material, It Bought Ten Times More of Another Type



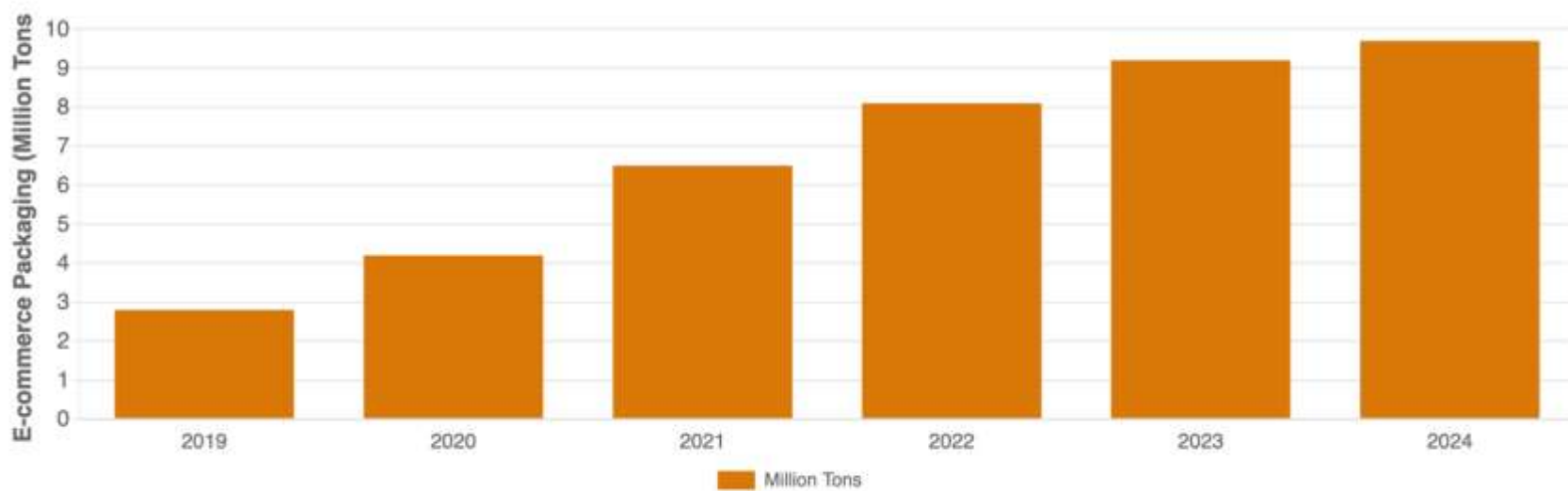
China banned waste paper imports but doubled recycled pulp purchases from the same region.



Industrial Change

When People Shop Online Instead of in Stores, Every Purchase Needs Its Own Shipping Box

E-Commerce Packaging **Exploded 245%** Since 2019

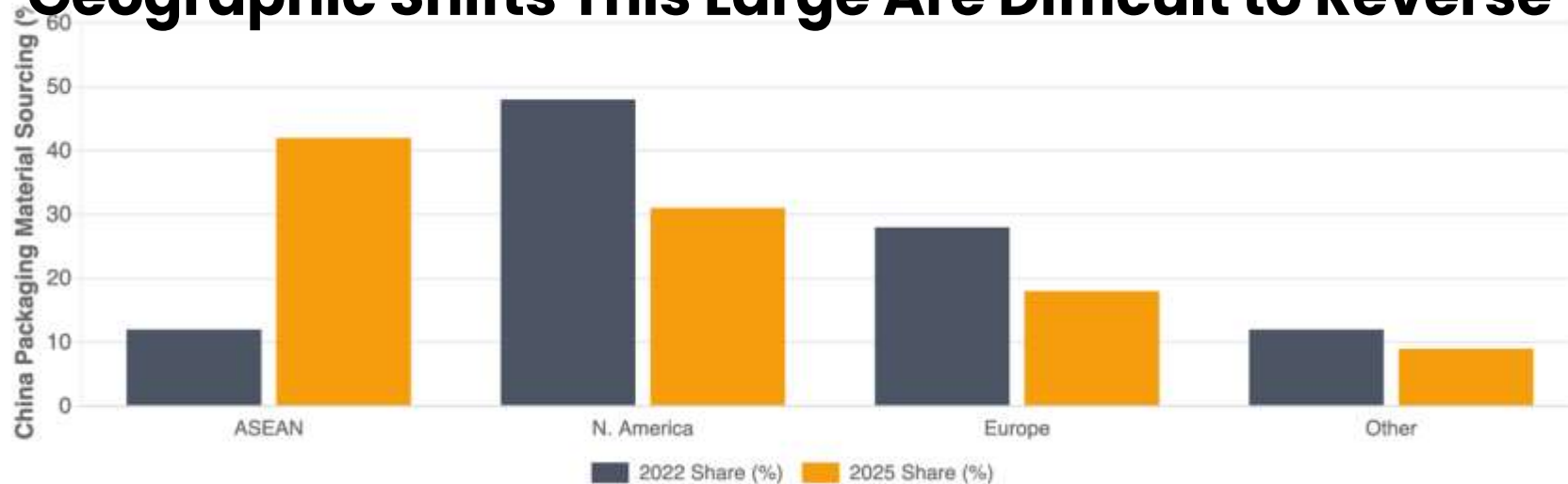


E-commerce created more boxes than supply chains could handle.

Supply chains reorganize themselves quickly

China Restructured Its Procurement Map: ASEAN from **12% to 42%** in **36 Months**

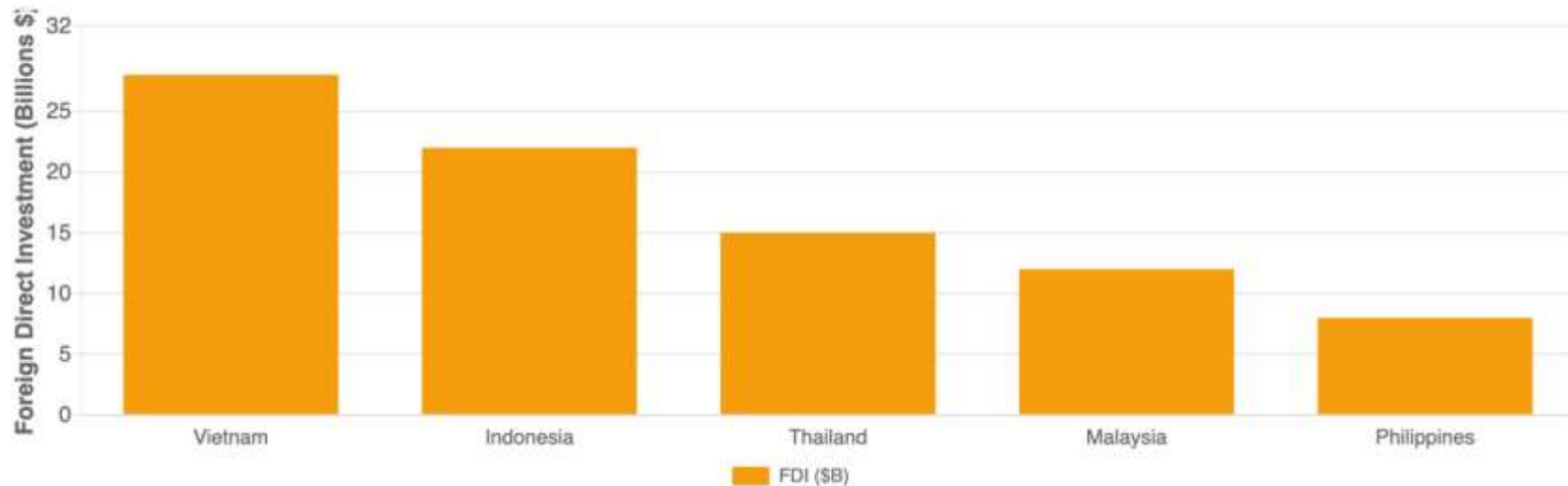
Geographic Shifts This Large Are Difficult to Reverse



When procurement shifts 30 percentage points in 3 years, supply chains reorganize around the new geography permanently.

Vietnam Starts to Lead ASEAN in Foreign Investment Due to Manufacturing Reliability

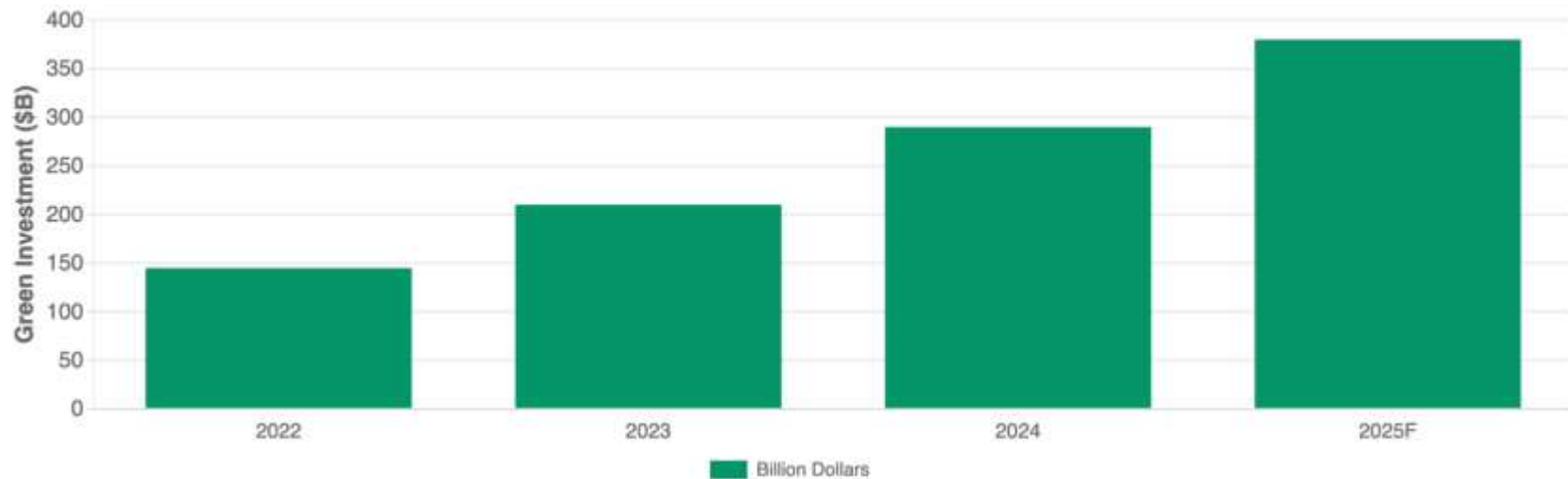
2024 Foreign Direct Investment by ASEAN Country



Manufacturers invest where they can depend on infrastructure, labor supply, and regulatory stability over multi-year cycles.

Investors Are Putting Twice as Much Money Into Sustainable Projects as They Did in 2022

ESG Investment Doubled: **\$145B to \$290B** in Asia-Pacific

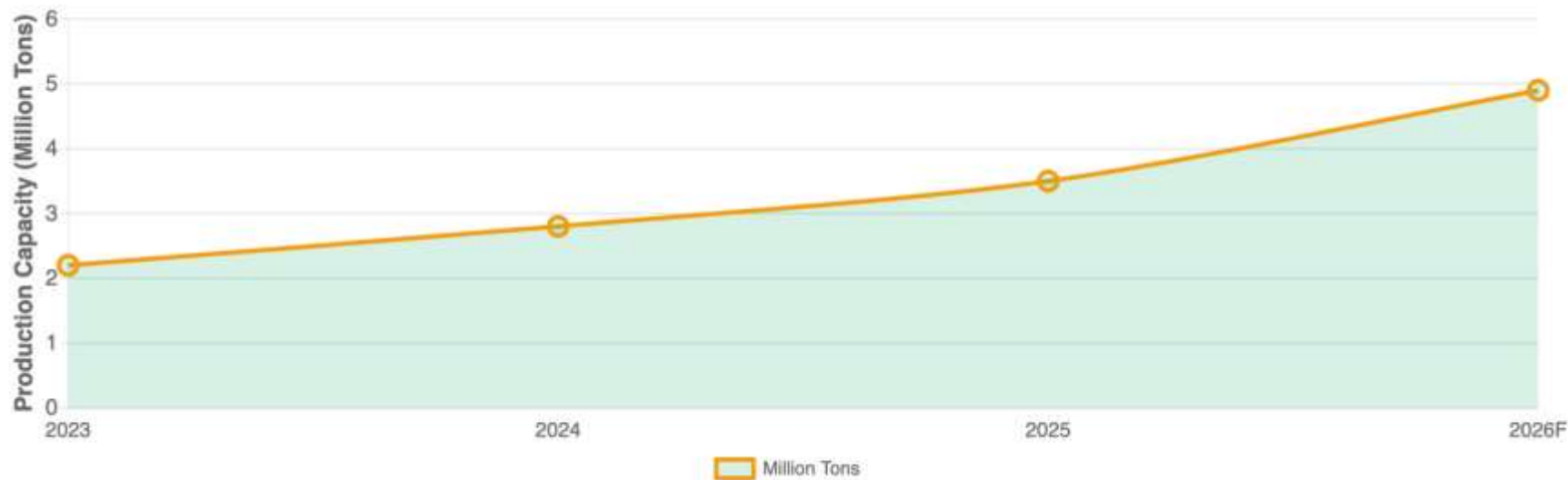


ESG mandates force institutional investors to allocate capital to certified sustainable projects, doubling funds available every 3 years.

Vietnam Is Building Factories Today

That Will Supply Packaging for most of Southeast Asia by Next Year

Current Investment Patterns Point to **40% Capacity Growth**



Current factory construction locks in regional supply leadership for 10+ years because competitors can't match the speed or scale.



The new normal

CPG Procurement Patterns

P&G, Nestlé, Kimberly-Clark: November 2024 - October 2025



CPG brands maintain steady baseline demand with predictable 10–15% March surges driven by pre-tariff procurement strategies.

Electronics Procurement Patterns

Apple, Samsung, Dell: November 2024 – October 2025



Electronics packaging shows extreme seasonality: Q4 orders reach 180–200% of baseline, followed by January drops to 30–40% as holiday inventory clears.

E-Commerce Procurement Patterns

Amazon, Alibaba, UPS: November 2024 – October 2025



E-commerce packaging doubles in November for Singles' Day and Black Friday, then contracts 60% in January as post-holiday returns complete and demand normalizes.

Publishing Procurement Patterns

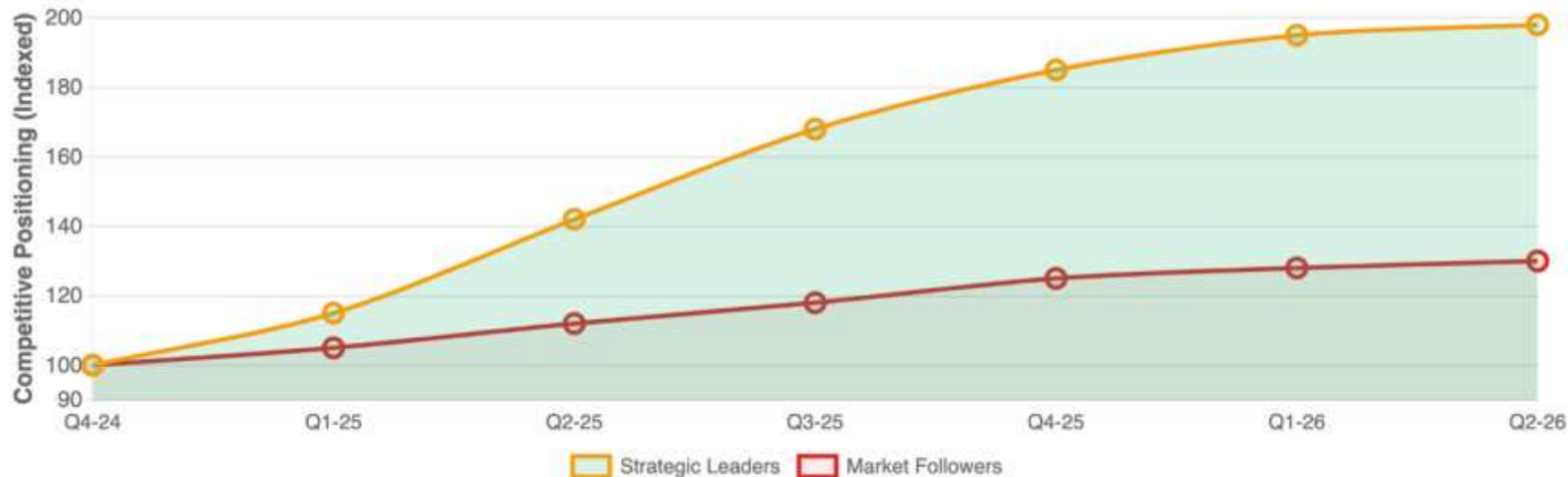
RR Donnelley, Staples, News Corp: November 2024 – October 2025



Publishing shows dual peaks: August surges 50% for back-to-school textbooks and materials, while Staples adds November retail spike of 50% above baseline.

Leaders Pull Away in 24 Months, Gaps Don't Close for 5+ Years

We need to Track Consumer Behavior First, Watch for Brand Responses Second, And Prepare for Supplier Changes Third



Companies that reposition with suppliers now capture 24-month advantage. Those who wait face 5+ year catch-up periods that never close.



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THANK YOU