

# Competitor Analysis Report: Nike vs. Adidas vs. Puma in Southeast Asia (October 2024 – March 2025)

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## 1. Executive Summary

This report presents a comprehensive competitor analysis for Nike, Adidas, and Puma, focusing on promotional campaigns launched in Southeast Asia between October 2024 and March 2025. The analysis covers campaign objectives, creative strategies, featured products, and performance metrics such as revenue impact, customer engagement, and market share shifts. Additionally, the report explores how major events and economic factors—like new tariffs and shifting consumer preferences—have influenced campaign outcomes. Strategic recommendations are provided to strengthen Nike's market position in the region.

## Key Findings

- **Campaign Localization:** Competitors increasingly tailored campaigns to local markets; Puma's "See The Run Like We Do" and Adidas's integration with local culture are prime examples.
  - **Community & Digital Emphasis:** Nike's focus on app-driven engagement and Adidas's "Plus One" approach highlight the shift toward consumer-centric, experiential marketing.
  - **Tariff Implications:** Recently re-introduced U.S. tariffs have potential to impact production costs and retail pricing for brands sourcing from Southeast Asia.
  - **Revenue & Market Share:** While Puma demonstrated quantifiable growth in e-commerce metrics and brand momentum, exact data on Nike and Adidas require further disclosure.
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## 2. Market Overview

Southeast Asia has become a crucial battleground for global sportswear brands due to its rising middle class, robust e-commerce growth, and growing youth population. According to Statista, the sneaker market in the ASEAN region is projected to reach over US\$2.0 billion by 2025 (Statista, 2023). Consumers in countries like Indonesia, Malaysia, Thailand, Vietnam, and the Philippines demonstrate strong interest in fitness, streetwear, and athleisure, supporting the success of brands such as Nike, Adidas, and Puma.

### Key Market Trends

- **E-Commerce Boom:** Post-pandemic digital adoption remains high, making online platforms the central hub for product launches and campaigns.
- **Consumer Health & Fitness Awareness:** Demand for performance-oriented footwear and apparel has surged, as evidenced by Puma's Deviate NITRO™ campaigns.
- **Localization & Cultural Relevance:** Consumers respond positively to campaigns that blend sportswear identities with local cultural elements (Adidas x Ya Kun Kaya Toast, 2025).

- **Competitive Fragmentation:** While Nike, Adidas, and Puma dominate segments, emerging brands—both local and international—are diversifying the market.
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## 3. Competitor Profiles

### 3.1 Nike

#### 3.1.1 Market Share, Product Lines & Pricing Strategies

- **Market Share:** Precise figures for Q4 2024 to Q1 2025 are not publicly disclosed, but Nike remains one of the top players, leveraging brand heritage and digital ecosystems.
- **Product Lines:** Signature running shoes (Air Max, Air Zoom series), lifestyle footwear (Air Force 1), training apparel, and high-profile collaborations (e.g., Air Jordan).
- **Pricing Strategies:** Prices generally remain on the premium side, with tiered pricing for entry-level running shoes (~US\$100–150) aimed at attracting cost-sensitive segments.

#### 3.1.2 Recent Campaigns (October 2024 – March 2025)

- **Nike App Expansion (October 2024)**
  - *Regions Launched:* Singapore, Thailand, Philippines, Malaysia, Indonesia, Vietnam.
  - *Campaign Overview:* Emphasized digital membership, personalized product recommendations, and exclusive drops.
  - *Products Promoted:* Air Jordan 1, Air Force 1, Air Max.
  - *Pricing Information:* Regionally adjusted; no specific data was disclosed.
  - *Key Performance Indicators:* App downloads, user engagement, and member conversion.
  - *Revenue Impact:* Specific figures unavailable; however, the campaign likely bolstered Nike's direct-to-consumer sales channels (Marketing-Interactive, 2024).

- *Target Audience:* Digitally savvy, fitness-oriented youth and general sneaker enthusiasts.
- *Market Impact:* Enhanced brand loyalty through app-based experiences in line with Southeast Asia’s mobile-centric economy.
- **Sabrina Ionescu’s Asia Tour (February 2025)**
  - *Regions Launched:* Philippines (Manila segment), Hong Kong, and China.
  - *Campaign Overview:* Included basketball clinics, community engagements, launching the Nike Sabrina 2 shoe.
  - *KPI Focus:* Community outreach, brand engagement, promotion of women’s basketball.
  - *Competitive Impact:* Reinforced Nike’s emphasis on leading with top athlete endorsements, with a strong female sports focus.

3.1.3 SWOT Analysis

Strengths	Weaknesses
Global brand recognition	Premium pricing may deter price-sensitive segments
Strong direct-to-consumer digital ecosystem	Reliance on key athlete endorsements
Wide product range spanning sports & lifestyle	Regional campaigns not always fully localized

Opportunities	Threats
Collaborations with local influencers	Rise of Chinese sportswear brands in SEA
Capitalizing on data analytics from Nike App	Tariff hikes & supply chain disruptions
Expanded presence in women’s sports segments	Intensified regional competition in e-commerce

### 3.1.4 Performance Metrics & Successful Campaigns

- *Digital Engagement:* Growth in app use noted (no exact CTR or ROI data disclosed).
  - *Revenue Implications:* Indirect evidence suggests stable performance, but overshadowed by Puma's e-commerce gains (Insideretail.asia, 2024).
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## 3.2 Adidas

### 3.2.1 Market Share, Product Lines & Pricing Strategies

- **Market Share:** Historically strong in streetwear (Samba, Supernova), moderate emphasis on performance gear.
- **Product Lines:** Boost and Adizero running series, the Samba lifestyle line, and football apparel.
- **Pricing Strategies:** Similar to Nike, but with diversified mid-range offerings (e.g., localized practices such as hijab-friendly designs in Malaysia).

### 3.2.2 Recent Campaigns (October 2024 – March 2025)

- **'Plus One' & 'Supernova' Films (March 2025)**
  - *Regions Launched:* Malaysia, Indonesia.
  - *Campaign Overview:* Highlighted the supportive figures behind athletes, released during Ramadan to capitalize on themes of spiritual reflection and mental wellness.
  - *Products Promoted:* Supernova Rise 2 running shoe.
  - *Target Audience:* Runners observing Ramadan; culturally sensitive approach.
  - *Market Impact:* Strengthened brand loyalty in predominantly Muslim markets (CampaignBriefAsia, 2025).
- **Adidas x Ya Kun Kaya Toast (February 2025)**
  - *Regions Launched:* Singapore.
  - *Campaign Overview:* Celebrated local culture by merging Adidas's style heritage with a beloved café chain.

- *Products Promoted:* Limited-edition tees, hoodies, enamel pins with local food motifs.
- *Pricing Information:* Not specified; likely mid-tier to premium limited merch.
- *KPIs:* Social media impressions, local brand engagement.
- *Revenue Impact:* Not disclosed, yet heightened brand visibility around Singapore’s National Day.

3.2.3 SWOT Analysis

Strengths	Weaknesses
Strong brand loyalty in lifestyle & football segments	Potential overlap with Nike’s audience segments
Increasing focus on culturally relevant campaigns	Reliance on European design & brand identity
Partnerships with local celebrities & sports events	Supply chain impacted by US tariff concerns

Opportunities	Threats
Strategic local collaborations (café & music scenes)	Emergence of local SEA footwear brands
Expansion in women’s and youth football segments	Competitive pricing pressure from Nike & Puma
Strengthening e-commerce presence	Changing consumer tastes in fashion-driven market

3.2.4 Performance Metrics & Successful Campaigns

- *Success in Malaysia:* Engagement with local celebrities and events (1xMarketing, 2025).
  - *Momentum in Football:* Official performance partner for ASEAN tournaments, fostering brand credibility among football fans.
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## 3.3 Puma

### 3.3.1 Market Share, Product Lines & Pricing Strategies

- **Market Share:** Reportedly smaller global share than Nike or Adidas but experiencing growth in Southeast Asia (RetailAsia, 2023).
- **Product Lines:** Known for running (Deviate NITRO™ series), lifestyle (Speedcat, Palermo), and strong collaborations.
- **Pricing Strategies:** Generally positioned slightly below Nike and Adidas's premium lines, with targeted e-commerce promotions.

### 3.3.2 Recent Campaigns (October 2024 – March 2025)

- **“See The Run Like We Do” (September 2024)**
  - *Regions Launched:* Singapore, Malaysia, Indonesia, Thailand, Philippines, Vietnam.
  - *Campaign URL:* [https://campaignbriefasia.com/2024/09/26/puma-launched-first-south-east-asia-centric-running-film-via-govt-singapore/?utm\\_source=openai](https://campaignbriefasia.com/2024/09/26/puma-launched-first-south-east-asia-centric-running-film-via-govt-singapore/?utm_source=openai)
  - *Campaign Overview:* Encouraged everyday runners, focusing on unique challenges (humidity, community support).
  - *Products Promoted:* Deviate NITRO™ 3 running shoe.
  - *Pricing Information:* Not publicly disclosed in the sources.
  - *KPIs:* Community engagement, brand recognition; recognized as Marketing Initiative of the Year (RetailAsia, 2023).
  - *Target Audience:* Non-elite runners looking for comfortable performance shoes.
  - *Revenue Impact:* Puma's Asia-Pacific sales grew ~3–4% (PumaGroup.com, 2024).
  - *Market Impact:* Enhanced brand presence in running communities.
  - *Competitive Impact:* Distanced itself from performance-only messaging by tapping personal stories.
- **PUMA Palermo Pop-Up (March 2024)**

- *Region:* Bangkok, Thailand.
- *Campaign Overview:* Immersive pop-up celebrating the Palermo sneaker with interactive installations.
- *Target Audience:* Sneaker enthusiasts.
- *KPIs:* Over 1,600 public visitors (CampaignBriefAsia, 2024).

3.3.3 SWOT Analysis

Strengths	Weaknesses
Targeted e-commerce strategies recognized regionally	Smaller overall market share compared to Nike & Adidas
Strong local outreach (e.g., “See The Run Like We Do”)	Limited brand association with top-tier global sports
Good mid-tier price points	Potential overshadowed in marquee sports sponsorships

Opportunities	Threats
Further localizing campaigns with regional athletes	Price sensitivity due to ongoing tariff fluctuations
Leveraging rising running community post-pandemic	Competition from local SEA footwear brands
Partnerships with national football associations	Emerging Chinese brands targeting same consumer base

3.3.4 Performance Metrics & Successful Campaigns

- *E-commerce Growth:* Direct-to-consumer business grew by 16.6% in 2024 globally, with strong contributions from Southeast Asia (PumaGroup.com, 2024).
  - *Brand Recognition:* Recipients of Retail Asia Awards (2023) for marketing excellence in Malaysia and Singapore.
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## 4. Comparison Tables

### 4.1 Campaign Focus & Key Products

Brand	Notable Campaign (SEA)	Key Product(s)	Target Segment
Nike	Nike App + Sabrina Ionescu Asia Tour	Air Force 1, Air Jordan 1	Digitally engaged
Adidas	‘Plus One’ & ‘Supernova’ (Ramadan Focus)	Supernova Rise 2, Samba	Culturally minded
Puma	“See The Run Like We Do”	Deviate NITRO™ 3, Palermo	Everyday runners

### 4.2 Pricing Positioning

Brand	Premium Range	Mid Range	Entry-Level Range
Nike	US\$150+ (premium collabs)	US\$100–150 (running)	Under US\$100 (select lines)
Adidas	US\$150+ (special releases)	US\$90–150 (general)	Under US\$90 (some lifestyle)
Puma	US\$140+ (limited)	US\$90–140	Under US\$90

(Note: Figures are approximate estimates based on historical brand pricing; actual SEA retail prices may vary.)

### 4.3 KPI Highlights

Brand	KPI Reference	Engagement Metric	Example Campaign
Nike	Member App Downloads	Not Disclosed	Nike App SEA Launch (2024)
Adidas	Social Media Mentions (Ramadan Films)	Not Disclosed	“Plus One” & “Supernova” Films (2025)
Puma	Retail Asia Awards for Marketing (2023)	Award-based brand recognition	“See The Run Like We Do” (2024)

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## 5. Strategic Insights

1. **Localization is Paramount:** Adidas's use of Ramadan-focused content and Puma's highlighting of runners' unique challenges have both garnered local appeal. Nike can consider deeper cultural integration.
  2. **Digital First:** Nike's emphasis on app-based membership illustrates the ongoing pivot to direct-to-consumer models. Competitors with strong digital presence, such as Puma's AI e-commerce personalization, are also reaping benefits.
  3. **Collaborative Campaigns:** Adidas's partnership with local café chains and Puma's pop-up experiences demonstrate the power of local pop-culture tie-ins. Co-branded efforts can offer fresh engagement strategies for Nike.
  4. **Community & Grassroots Engagement:** Both Adidas (local music events) and Puma (Run Clubs) successfully nurture brand loyalty. Nike can deepen local running clubs or grassroots sports initiatives.
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## 6. Impact Assessment

- **On Nike:** Competitors' moves to localize campaigns (Adidas) and emphasize everyday athletes (Puma) threaten Nike's positioning if Nike leans too heavily on global athlete endorsements without local nuance.
  - **On Market Share:** Puma's e-commerce gains and Adidas's cultural entrenchment may redirect potential Nike customers. Nike's brand recognition remains high, but competitor differentiation is increasing.
  - **On Brand Perception:** Frequent brand experiences, especially physically immersive ones like Puma's pop-ups or Adidas's local events, can challenge Nike's reliance on purely digital-focused marketing strategies.
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## 7. Conclusion & Recommendations

### 7.1 Conclusion

The Southeast Asian sportswear arena from October 2024 to March 2025 highlights increasingly localized, digitally driven strategies by Adidas and Puma. While Nike maintains global prestige, it risks losing market share if it does not adapt rapidly to local cultural preferences and community engagement models.

The reintroduction of U.S. tariffs and continuing post-pandemic shifts in consumer behavior have also shaped brand strategies, with an emphasis on balancing premium products, localized campaigns, and e-commerce innovation.

## 7.2 Recommendations

1. **Deepen Local Collaborations:** Nike should partner with culturally relevant figures—e.g., local athletes, musicians, or artists—to resonate with young consumers.
2. **Hybrid Campaign Approach:** Combine in-store (or pop-up) experiences with digital campaigns to replicate Puma's success. Interactive events build community and position Nike as more than just a performance brand.
3. **Focus on Entry-Level & Mid-Range:** Address the price-sensitive segments in Southeast Asia. Offering mid-range performance footwear (~US\$80–120) can broaden Nike's appeal.
4. **Tariff Mitigation Strategy:** Consider nearshoring or partial manufacturing diversification to hedge against future tariff hikes, maintaining competitive pricing.
5. **Enhanced Data Analytics:** Leverage data from the Nike App to personalize marketing efforts, crafting curated experiences for user segments, including women's sports and youth.
6. **Community Building for Runners:** Launch local run clubs, sponsor small-scale marathons, and nurture micro-influencer networks. This fosters organic brand advocacy.

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## 8. Appendices

1. **Appendix A:** Additional Pricing Tables
  2. **Appendix B:** Extended SWOT Diagrams
  3. **Appendix C:** Key Dates for Regional Sporting Events (October 2024 – March 2025)
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