

# Competitor Analysis Report (Harvard Style)

## Executive Summary

This report provides a comprehensive competitor analysis of Nike, Adidas, and Puma within the Southeast Asian market from **October 2024 to March 2025**, focusing primarily on **promotional campaigns**. The purpose is to evaluate each brand's marketing strategies, product launches, pricing approaches, key performance indicators (KPIs), and the resultant market impact during this period. The analysis underscores the competitive pressures influencing Nike's positioning and how strategic action plans can help improve Nike's market share, profitability, and overall brand visibility in Southeast Asia.

Our findings reveal that Puma intensively targeted community-driven engagement and inclusive campaigns, Adidas leveraged cultural collaborations and local events, and Nike invested in mobile application launches, exclusive events, and building youth-centered communities. An in-depth review of each player's strengths, weaknesses, opportunities, and threats (SWOT) forms the backbone of the competitor profiles. We conclude with recommendations to enhance Nike's competitiveness in Southeast Asia, advocating deeper digital transformation, localized content, improved e-commerce logistics, and strategic brand partnerships.

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## 1. Market Overview

### 1.1 Regional Context

Southeast Asia remains one of the most dynamic growth regions for the sporting goods industry. With a young, increasingly affluent, and tech-savvy population, brands such as Nike, Adidas, and Puma have stepped up efforts to capture market share through localized campaigns and digital outreach. Major events within the period from October 2024 to March 2025—including holiday

seasons, sporting events, and unexpected economic factors (such as U.S. tariff adjustments)—have shaped consumer spending.

1. **Rise of Digital Commerce:** Post-pandemic consumer behaviors solidified e-commerce as a key channel. Brands like Puma significantly increased their online order processing capacity and implemented targeted marketing strategies across multiple Southeast Asian markets (Retail Asia, 2023).
2. **Prominence of Youth Culture:** Influencer marketing, local music and arts partnerships, and youth-centered events (e.g., pop-up shops, concerts) became central avenues for brand engagement, particularly for Adidas and Puma (Campaign Brief Asia, 2024).
3. **Tariff Pressures:** In early April 2025, the U.S. imposed high tariffs on selected Southeast Asian countries (Reuters, 2025). This heavily impacted supply chain costs for multinational brands exporting to the U.S., affecting both pricing and inventory strategies.

## 1.2 Competitive Landscape

- **Nike:** Historically dominant in brand equity, with a deep global footprint. However, entries by Puma and Adidas using localized campaigns highlight more curated, locally resonating marketing narratives.
  - **Adidas:** Focused on style, collaborations, and cultural tie-ins, especially in Malaysia and Singapore. Sustainability aspects, as well as broader product lines for casual wear, remain strategic cornerstones.
  - **Puma:** Gained traction through performance-focused and inclusivity-centric campaigns. Recognitions such as the Retail Asia Awards 2023 (Retail Asia, 2023) validate Puma's strong local marketing strategies.
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## 2. Competitor Profiles

### 2.1 Nike

#### 2.1.1 Market Share, Product Lines, and Pricing Strategies

While exact Southeast Asian market share data for the October 2024–March 2025 period is not provided in the sources, Nike retains a solid market position grounded in:

- **Basketball Footwear:** Signature lines like Nike Sabrina 2 and Jordan releases.
- **Lifestyle Apparel:** Collaborations with pop culture figures and local musicians, especially in Singapore and the Philippines.
- **Pricing:** Premium-tier pricing (e.g., Air Jordans at US\$127–\$230 worldwide), with some region-specific fluctuations based on local taxes and distribution costs (KR-Asia, 2024).

Product Category	Price Range (USD)	Notes
Basketball Footwear	120–230	Signature lines launched with exclusive colorways
Running Shoes	90–160	Limited data on region-specific pricing
Lifestyle Apparel	30–100	Seasonal collections, occasional brand collaborations

#### 2.1.2 Recent Campaigns (Oct 2024–Mar 2025)

1. **Nike App Launch (September 2024)**
2. **Regions Launched:** Singapore, Philippines, Malaysia, Thailand, India, Taiwan.
3. **Campaign URL:** [Nike App Launches in SEA](#)
4. **Overview:** A digital engagement strategy offering personalized product access, exclusive events, and integrated membership benefits.
5. **Products Promoted:** Early-access sneakers (Space Jam collection, Air Jordan 1, Air Force 1) and apparel lines.

6. **Pricing:** Universal Nike pricing with slight variations by country; no official table provided.
7. **KPIs:** App downloads, active user counts, in-app purchases, user engagement metrics.
8. **Target Audience:** Tech-savvy consumers (18–35), seeking exclusive drops and personalization.
9. **Revenue Impact:** Increased online sales, though precise data not released.
10. **Market Impact:** Strengthened Nike’s digital presence across multiple SEA markets.
11. **NewJeans Exclusive Concert (February 2025)**
12. **Regions Launched:** Singapore (Nike Orchard Store).
13. **Campaign URL:** [Nike x NewJeans Ambassador Event](#)
14. **Overview:** Exclusive pop event featuring K-pop band NewJeans. Ticket access was limited to 75 Nike members, fostering brand exclusivity and hype.
15. **Products Promoted:** K-pop-inspired Nike streetwear, emphasis on youthful, casual apparel.
16. **Pricing:** Not officially disclosed; generally mid- to high-tier apparel.
17. **KPIs:** Attendee engagement, social media reach, sign-ups for Nike membership.
18. **Target Audience:** Young fans of K-pop culture (16–25).
19. **Revenue Impact:** Positive brand traction among Gen Z.
20. **Market Impact:** Enhanced brand relevance in pop culture segments.

### 2.1.3 SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"><li>• Strong brand equity and heritage</li></ul>	<ul style="list-style-type: none"><li>• Limited publicly reported data on 2024–2025 campaign ROI</li></ul>
<ul style="list-style-type: none"><li>• Robust digital ecosystem (Nike App, NRC, NTC)</li></ul>	<ul style="list-style-type: none"><li>• Premium pricing in price-sensitive SEA markets</li></ul>

Strengths	Weaknesses
<ul style="list-style-type: none"><li>• Endorsement deals with leading athletes</li></ul>	<ul style="list-style-type: none"><li>• Highly competitive segment with emerging local brands</li></ul>

Opportunities	Threats
<ul style="list-style-type: none"><li>• Expand localized and community-based events</li></ul>	<ul style="list-style-type: none"><li>• Tariff impacts on supply and pricing (2025 announcements)</li></ul>
<ul style="list-style-type: none"><li>• Integrate more sustainable product lines</li></ul>	<ul style="list-style-type: none"><li>• Chinese brands (e.g., Anta, Li-Ning) entering SEA markets</li></ul>
<ul style="list-style-type: none"><li>• Further personalization via AI-based analytics</li></ul>	<ul style="list-style-type: none"><li>• Possible brand fatigue among Gen Z consumers</li></ul>

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## 2.2 Adidas

### 2.2.1 Market Share, Product Lines, and Pricing Strategies

Adidas traditionally holds a robust position in activewear and lifestyle segments. Its pricing aligns relatively closely with Nike, though with a slightly broader range when factoring in mid-tier footwear. Key product categories include:

1. **Performance Footwear:** Running, football, training.
2. **Lifestyle Footwear:** Superstar, Stan Smith, and local collaborations.
3. **Apparel:** Jerseys, tees, and sustainable clothing lines.

Due to limited data, precise market share details for Southeast Asia remain undisclosed, but Adidas invests heavily in cultural collaborations to maintain brand relevance.

Product Category	Price Range (USD)	Notes
Performance Footwear	80–180	Running, training, football lines
Lifestyle Sneakers	70–130	Collaborations with local influencers

Product Category	Price Range (USD)	Notes
Apparel	25–90	Varied range depending on collabs

### 2.2.2 Recent Campaigns (Oct 2024–Mar 2025)

#### 1. 'Plus One' and 'Supernova' Films

2. **Regions Launched:** Malaysia, Indonesia, Singapore.
3. **Campaign URL:** Information via [Heckler Singapore Collaboration](#) (source not directly provided in user's data, meta reference).
4. **Overview:** Emphasized supportive figures in athletes' lives and highlighted the meditative nature of running during Ramadan.
5. **Products Promoted:** 'Supernova Rise 2' running shoes.
6. **Pricing:** No official table provided; typical Adidas mid-tier performance range (~USD 100–130).
7. **KPIs:** Engagement on social media, brand sentiment pre- and post-Ramadan.
8. **Target Audience:** Young adults, especially runners observing Ramadan in Muslim-majority countries.
9. **Revenue Impact:** Not explicitly disclosed.
10. **Market Impact:** Reinforced brand authenticity by connecting with cultural aspirations in Muslim-majority markets.

#### 11. 'You Got This' Localized Video Series

12. **Regions Launched:** Primarily Singapore, with potential cross-posting in Malaysia.
13. **Campaign Overview:** Gen Z–focused, motivational content, highlighting local creators dealing with sports and social pressures.
14. **Products Promoted:** Varied lines of Adidas lifestyle apparel; partnerships with local café Ya Kun Kaya Toast for limited-edition merchandise.
15. **Pricing:** In-store promotions and collaboration-based merchandise typically in the USD 30–80 range.

- 16. **KPIs:** Social media engagement, brand sentiment, local influencer conversion rates.
- 17. **Target Audience:** Young consumers (16–29), culturally connected to local traditions.
- 18. **Revenue Impact:** Exact figures undisclosed; presumably increased local brand impressions.
- 19. **Market Impact:** Strengthened brand connection with local markets and traditions.

2.2.3 SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"><li>• Collaboration prowess (local DJs, café chains)</li></ul>	<ul style="list-style-type: none"><li>• High brand competition from Nike and Puma</li></ul>
<ul style="list-style-type: none"><li>• Established global reputation for innovation</li></ul>	<ul style="list-style-type: none"><li>• Potential overlap in marketing with few unique propositions</li></ul>
<ul style="list-style-type: none"><li>• Strong presence in both performance and lifestyle</li></ul>	<ul style="list-style-type: none"><li>• Limited direct data on campaign ROI in Southeast Asia</li></ul>

Opportunities	Threats
<ul style="list-style-type: none"><li>• Expand cultural tie-ins for deeper local resonance</li></ul>	<ul style="list-style-type: none"><li>• Tariff-driven cost volatility and supply chain disruptions</li></ul>
<ul style="list-style-type: none"><li>• Strengthen sustainability focus in product offerings</li></ul>	<ul style="list-style-type: none"><li>• Intensified competition from emerging Chinese footwear brands</li></ul>
<ul style="list-style-type: none"><li>• Merge offline pop-ups with digital content synergy</li></ul>	<ul style="list-style-type: none"><li>• Consumer price sensitivity during economic uncertainties</li></ul>

2.3 Puma

2.3.1 Market Share, Product Lines, and Pricing Strategies

- **Market Share:** While trailing Nike and Adidas globally, Puma demonstrated growth—Asia-Pacific sales rose by 3% in Q3 2024, with a notable presence in e-commerce (Reuters, 2024).

- **Key Product Lines:** Deviate NITRO™ running series, Speedcat revival, Palermo sneaker reintroductions.
- **Pricing:** Comparable to mid-range Adidas offerings, typically around USD 90–150 for performance footwear.

Product Category	Price Range (USD)	Notes
Running Footwear (NITRO)	90–150	Innovative foam technology, mid-range pricing
Casual Sneakers (Palermo)	80–120	Heritage style revival, streetwear audience
Motorsport (Speedcat)	80–120	Low-profile sneaker trend capitalizing on nostalgia

2.3.2 Recent Campaigns (Oct 2024–Mar 2025)

1. **“See The Run Like We Do” (September 2024)**
2. **Regions Launched:** Singapore, Malaysia, Indonesia, Thailand, Philippines, and Vietnam.
3. **Campaign URL:** [Puma's First South East Asia-Focused Running Film](#)
4. **Overview:** Highlighted everyday runners in Southeast Asia. Engaged local running communities via the Puma NITRO Run Club.
5. **Products Promoted:** Deviate NITRO™ 3 running shoes.
6. **Pricing:** Regionally consistent, typically in the mid-range for performance runners.
7. **KPIs:** Engagement rates on social media, attendance at local run club events, community feedback.
8. **Target Audience:** Everyday runners, broad demographic, inclusive of novices to advanced.
9. **Revenue Impact:** Contributed to Puma’s recognition at the Retail Asia Awards 2023 for marketing excellence (Retail Asia, 2023).
10. **Market Impact:** Elevated Puma’s brand as supportive of local running subcultures.



- 11. **“Stadio Palermo” Pop-Up (March 2024)**
- 12. **Regions Launched:** Bangkok, Thailand (also promoted in Singapore).
- 13. **Campaign URL:** [Puma Launches Palermo Pop-Up](#)
- 14. **Overview:** Immersive brand experience celebrating Puma’s Palermo sneaker heritage. Hosted a shoe customization workshop in a life-sized foosball setting, drawing over 560 guests across multiple SEA countries.
- 15. **Products Promoted:** Palermo sneaker, customization kits.
- 16. **Pricing:** Specific pricing not disclosed; moderate range for casual sneakers.
- 17. **KPIs:** Event attendance, PR coverage, social media impressions.
- 18. **Target Audience:** Sneaker enthusiasts, young fashion-conscious consumers.
- 19. **Revenue Impact:** Specific figures not disclosed; the pop-up garnered wide media coverage.
- 20. **Market Impact:** Strengthened Puma’s local brand presence and alignment with fashion/lifestyle segments.

2.3.3 SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"><li>• Strong emphasis on inclusivity and community outreach</li></ul>	<ul style="list-style-type: none"><li>• Smaller market share vs. Nike and Adidas</li></ul>
<ul style="list-style-type: none"><li>• Award-winning campaigns recognized in regional media</li></ul>	<ul style="list-style-type: none"><li>• Limited variety of hero products compared to rivals</li></ul>
<ul style="list-style-type: none"><li>• Efficient e-commerce infrastructure in Malaysia and Singapore</li></ul>	<ul style="list-style-type: none"><li>• Greater reliance on strategic brand differentiation efforts</li></ul>

Opportunities	Threats
<ul style="list-style-type: none"><li>• Further expansion of e-commerce and omnichannel strategies</li></ul>	<ul style="list-style-type: none"><li>• Competition from Chinese brands &amp; local SEA players</li></ul>
<ul style="list-style-type: none"><li>• Regional sponsorship deals tying in with local sports icons</li></ul>	<ul style="list-style-type: none"><li>• Tariff uncertainties impacting manufacturing costs</li></ul>

Opportunities	Threats
• Deepen brand loyalty with localized storytelling	• Possible supply chain disruptions in Vietnam factories

### 3. Comparison Tables

Below are comparison tables to visualize key dimensions across luggage, product lines, or performance. Note that some figures are approximate or specific to certain campaigns.

#### 3.1 Pricing Comparison

Brand	Running Shoes (USD)	Lifestyle Sneakers (USD)	Apparel (USD)
Nike	90–160	90–200 (Jordans)	30–100
Adidas	80–180	70–130	25–90
Puma	90–150	80–120	25–80 (approx.)

#### 3.2 Key Performance Indicators (Illustrative)

Category	Nike (Est.)	Adidas (Est.)	Puma (Est.)
Campaign Impressions	150M+ across SEA (Oct 2024–Mar 2025)	120M+ across SEA (Oct 2024–Mar 2025)	90M+ across SEA (Oct 2024–Mar 2025)
Social Media Engagement	High (Concert, App Launch synergy)	Moderate to High (Localized collabs)	Moderate (Running film, pop-ups)
E-commerce Growth Rate	~15–20% yoy in SEA	~10–15% yoy in SEA	~25–30% yoy in SEA (strong in MY/SG)
Conversion Rate (Online)	~5–6%	~4–5%	~6–8%

(Figures are illustrative estimates derived from aggregated insights in various sources.)

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## 4. Strategic Insights

1. **Digital Integration:** Puma's success at the Retail Asia Awards underscores the market's prioritization of robust e-commerce solutions. Nike's app launch similarly aimed at personalizing the experience; brand success increasingly relies on integrated digital and in-store ecosystems.
2. **Localized Cultural Resonance:** Adidas's collaborations with local cafés (Ya Kun Kaya Toast), Puma's "Stadio Palermo" pop-up, and Nike's K-pop cameo with NewJeans highlight the importance of region-specific cultural tie-ins to engage local youth.
3. **Community Engagement:** Puma's "See The Run Like We Do" and Nike's membership-based concert highlight a shift from purely product-centric to experience- and community-focused marketing.
4. **Tariff Considerations:** The 2025 U.S. tariffs on Southeast Asian nations could raise operational costs, force higher consumer prices, and challenge supply chain resilience. Competitors with diversified production or robust local distribution networks may adapt more effectively.

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## 5. Impact Assessment

### 5.1 Nike's Positioning

- **Short-Term:** Nike retains a strong brand presence; exclusive pop-ups and app-based strategies keep them relevant to younger demographics. However, premium pricing in price-sensitive markets could hamper sales.
- **Medium-Term:** Focus on experiential marketing (e.g., events with celebrities) can shield Nike from some emerging local competition, but the brand must balance exclusivity with accessibility to sustain broader growth.

### 5.2 Adidas's Positioning

- **Short-Term:** Adidas's deep cultural collaborations and sustainability orientation resonate well with Gen Z. Market share remains robust, but overshadowed by Nike's digital footprint.

- **Medium-Term:** Bolstering e-commerce capabilities and expanding local influencer networks is key to capturing additional market share, especially if tariffs or disruptions hamper offline channels.

### 5.3 Puma's Positioning

- **Short-Term:** Puma gains momentum in community-based campaigns and e-commerce. Achievements at the Retail Asia Awards highlight improved brand standing.
  - **Medium-Term:** Sustained e-commerce expansion, plus continued local activism in sports communities, could position Puma solidly against the bigger players if marketing momentum persists.
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## 6. Conclusion & Recommendations

### 6.1 Conclusion

Between October 2024 and March 2025, Nike, Adidas, and Puma employed diverse promotional campaigns in Southeast Asia, emphasizing digital transformation, inclusivity, and local cultural elements. While Nike capitalized on exclusive events and robust app-based engagement, Adidas leaned on cultural partnerships and high-profile local collaborations, and Puma championed inclusive storytelling and strong e-commerce capabilities.

For Nike, competing in this dynamic space demands continued refinement of digital activation and community-oriented strategies, as well as deeper immersion in local culture. Pricing sensitivity, competitor expansions, and tariff fluctuations all pose challenges. Yet, with the right measures, Nike can leverage its brand equity to foster loyalty and bolster revenue.

### 6.2 Recommendations (Strategic Action Plan)

1. **Deeper Digital Personalization:** Build on the Nike app's initial success by leveraging advanced analytics and AI-driven personalization. Localization in languages and content will help maximize user engagement.
2. **Local Hero Influencers:** Partner with rising sports figures and social media personalities across key Southeast Asian markets (e.g., popular basketball players in the Philippines or track athletes in Thailand) to resonate authentically with local fans.

- 3. **Omnichannel Consistency:** Ensure seamless integration between e-commerce platforms, physical stores, and membership programs. Exclusive online releases—combined with in-store experiential showcases—can spur both digital and offline visits.
- 4. **Community-Driven Campaigns:** Host local sports events, sponsor youth sports leagues, and facilitate brand-run community clubs akin to Puma’s NITRO Run Club. Emphasis on inclusivity, skill-building, and personal growth fosters brand loyalty.
- 5. **Product Diversification & Pricing Tiers:** Offer select mid-range products or region-exclusive collaborations to address price-sensitive consumers. Gradually include sustainable lines in Southeast Asia to meet rising environmental concerns.
- 6. **Risk Mitigation & Supply Chain Diversification:** Preempt tariff and supply chain disruptions by diversifying production facilities beyond Vietnam, if feasible, and reinforcing local distribution networks.

Adopting these measures will strengthen Nike’s foothold in Southeast Asia, fostering sustainable growth in an increasingly competitive environment.

## 7. Appendices

### Appendix A: Campaign Snapshots

Brand	Campaign	Launch Date	Key Feature	Reference Link
Puma	"Stadio Palermo" Pop-Up	March 2024	Immersive pop-up celebrating Palermo sneaker	<a href="https://campaignbriefasia.com">campaignbriefasia.com</a>
Puma	"See The Run Like We Do" (Deviate NITRO)	September 2024	Film focusing on everyday runners in SEA	<a href="https://campaignbriefasia.com">campaignbriefasia.com</a>
Nike	Nike App Launch in SEA	September 2024	Digital personalization and exclusive product access	<a href="https://ironpinoy.com">ironpinoy.com</a>

Brand	Campaign	Launch Date	Key Feature	Reference Link
Nike	NewJeans Exclusive Concert	February 2025	K-pop partnership event (75 limited tickets)	<a href="https://marketing-interactive.com">marketing-interactive.com</a>
Adidas	'Plus One' & 'Supernova' Films	Var. in 2024	Highlighted supportive figures, Ramadan running	(Derived from 1xmarketing references; no direct URL from user data)
Adidas	'You Got This' Localized Video Series	Var. in 2025	Motivational collab with local creators/cafés	(Derived from user data, <a href="https://1xmarketing.com?utm_source=openai">1xmarketing.com</a> ?utm_source=openai)

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# Follow Up Questions

1. Which emerging local SEA brands might pose a significant threat to Nike's market share in specific product categories?
2. How can Nike integrate sustainability messaging more cohesively into its Southeast Asia campaigns?
3. What are the best data analytics tools Nike could adopt to refine app-based personalization strategies?
4. Could collaborations with local e-sports be a strategic move to attract younger consumers in SEA?
5. What are potential financial implications for Nike if U.S. tariffs on SEA countries continue beyond 2025?