

The Split

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Synopsis

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China dominates manufacturing and is the world's largest retail market, but for companies outside of China, finding ways to do business in the country is increasingly uncertain in the face of rising US-China tension, combined with China's crackdowns on the tech and education sectors.

Shaun Rein runs the China Market Research Group and has spent his career helping multinationals understand where the opportunities are in China. An American who's lived in Shanghai for 25 years, he has long been one of the biggest China bulls. He now argues that while China is not a must-go destination for all companies and investors, there are still many non-politically sensitive sectors where long-term opportunities can be sought.

The Split analyses the geo-political split between the US and China, China's sharp turn towards socialism and how this will cut into fat margins in many sectors. It explains why corporations in sectors such as semiconductors and AI should stay clear of China and relocate to other countries like Vietnam, India and Mexico. Yet principally, Rein makes the case that that fears about China's shift are far overblown and that for most sectors it should remain the main growth driver for even the largest companies.

Expert insights into China's national policy reforms, its rising middle class seeking to save and invest, and their focus on health and wellness, will inform the international strategic decisions for companies around the world in sectors such as finance, consumer goods and auto.

China will soon eclipse the United States as the world's largest economy and companies will lose out if they do not know how to invest in China properly. No company has been able to get into China for 3 years. Shaun Rein hasn't left. He's therefore uniquely positioned to advise now that China is opening up again.

The Split presents a unique and informed case for why the time is definitely now to capitalize on policy changes and trends in China that will support long-term opportunities for your business.

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