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Anniversary!



Sino Benelux Business Survey

2025 Edition

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Sino Benelux Business Survey

2025 Edition

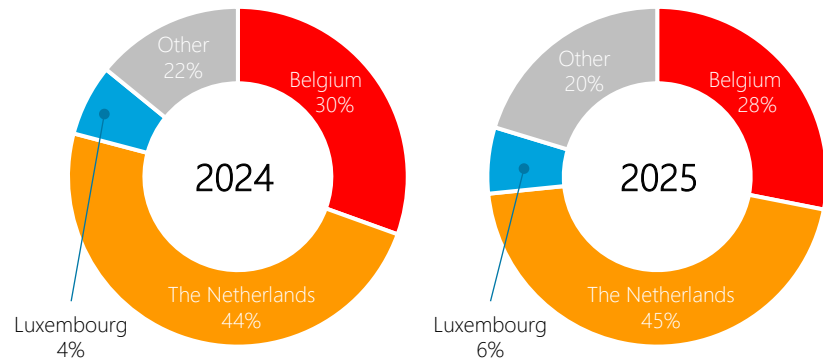
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Sino-Benelux Business Survey

On an annual basis, the Benelux Chamber of Commerce in China (Beijing, Shanghai and Pearl River Delta) supported by the official trade and diplomatic representations of Belgium, The Netherlands and Luxembourg in China organize in partnership with MSA the Sino Benelux Business Survey. The 2025 Sino Benelux Business Survey is published for the 10th year in a row and aims to be a fundamental piece for the Benelux community.

Parent Company



2025 Survey

- 10th consecutive year
- 30 questions
- Over 60 completed surveys

Table of Contents

Survey Demographics

Business Performance

Business Sentiment

Onward Expectations

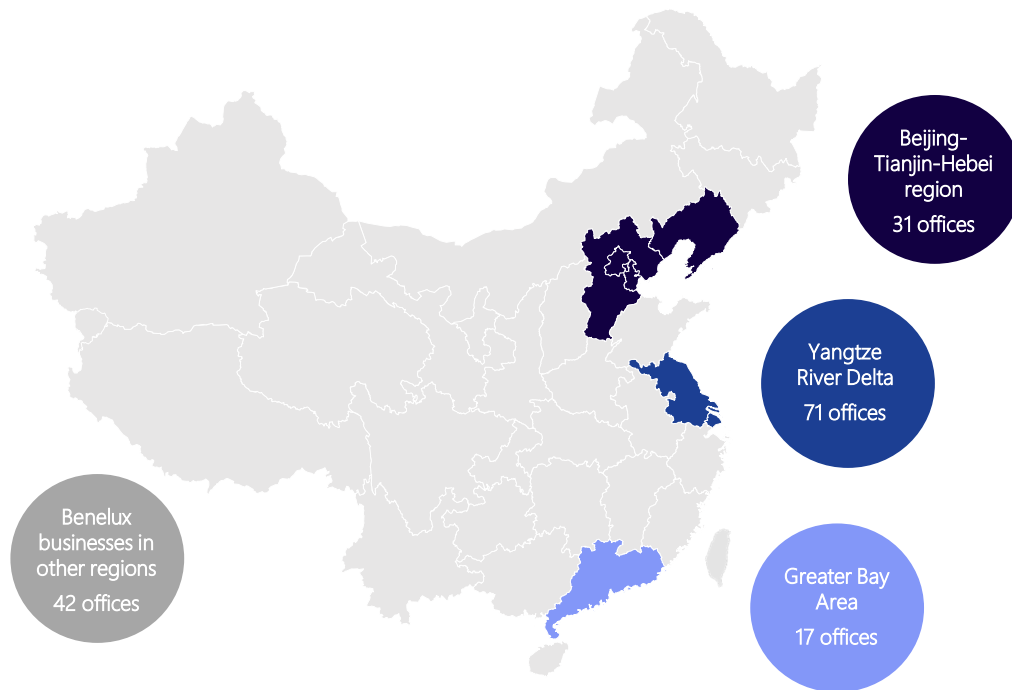
Closing Remarks



Survey Demographics

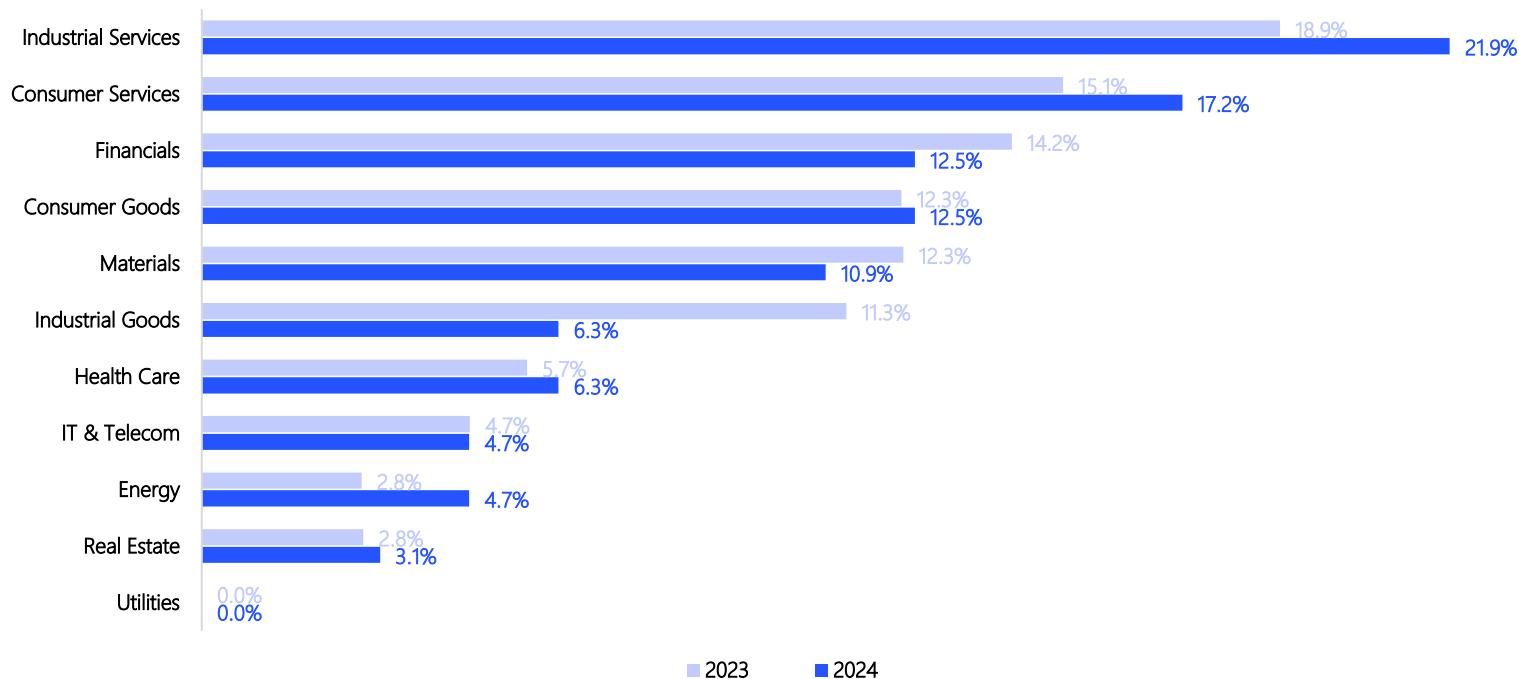
Location – by Province

Location of Benelux Companies in China



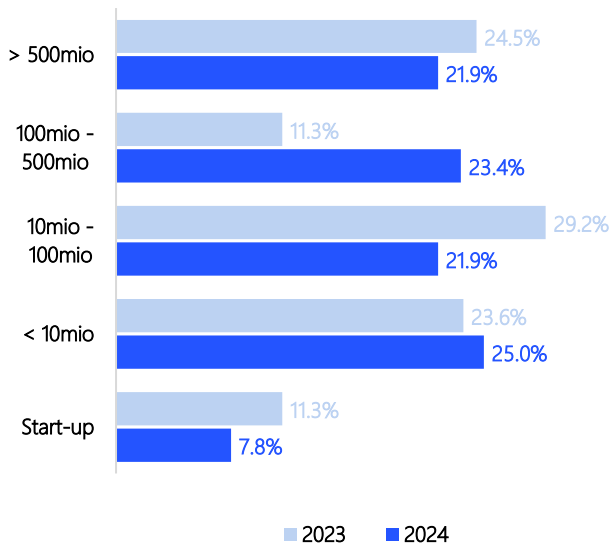
Industry Sectors Represented

Industry Categories (2023-2024)

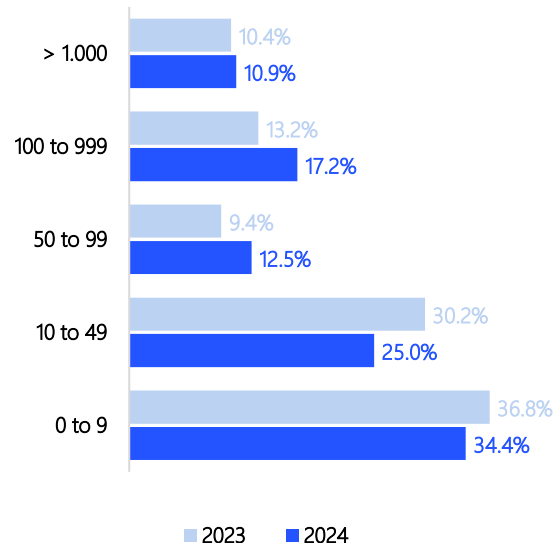


Company Size

Size by Revenue (RMB)

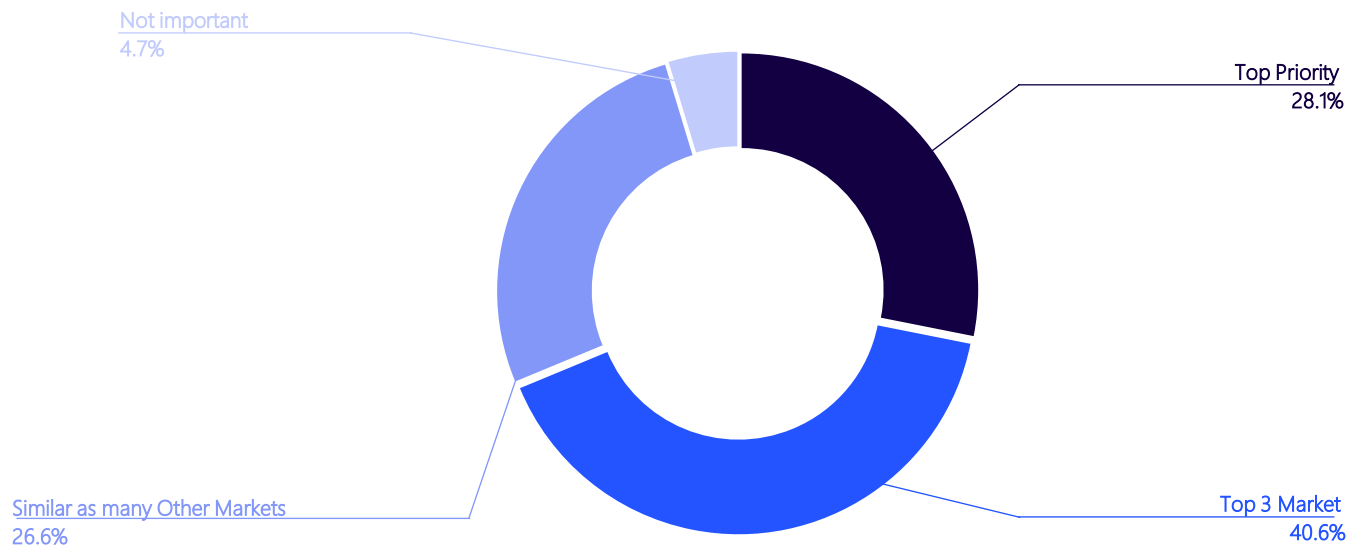


Size by Employees in China



Importance of China

China Entity's Importance in Group Strategy

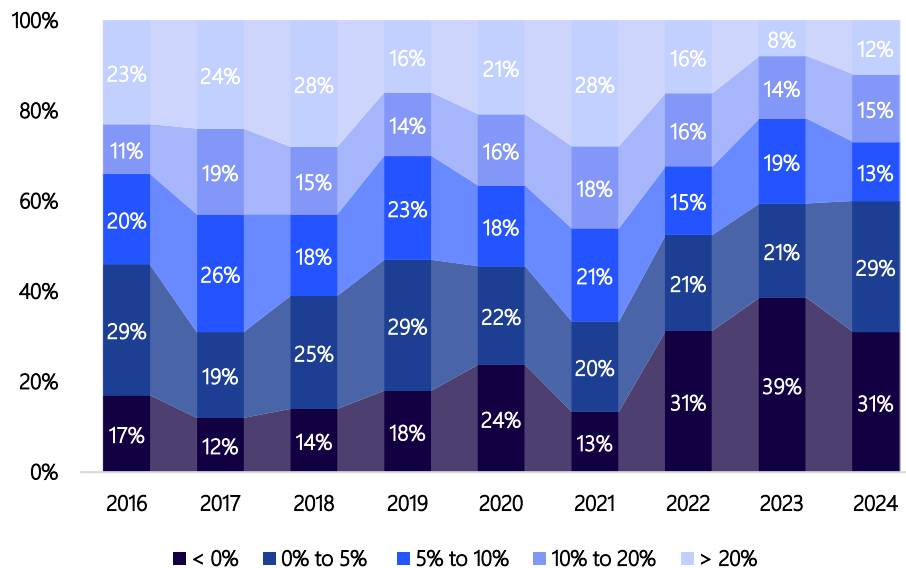




Business Performance

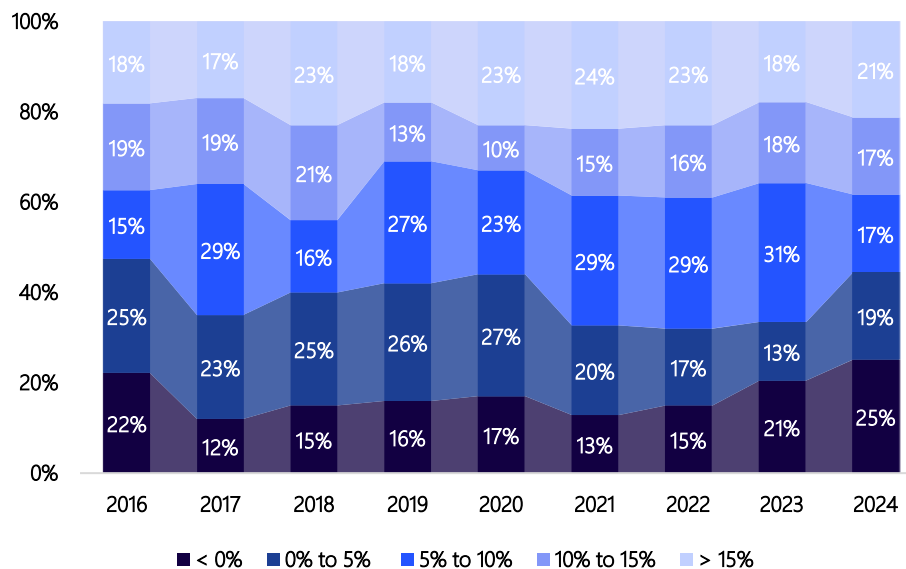
Revenue Growth

% Revenue Growth from 2016 to 2024



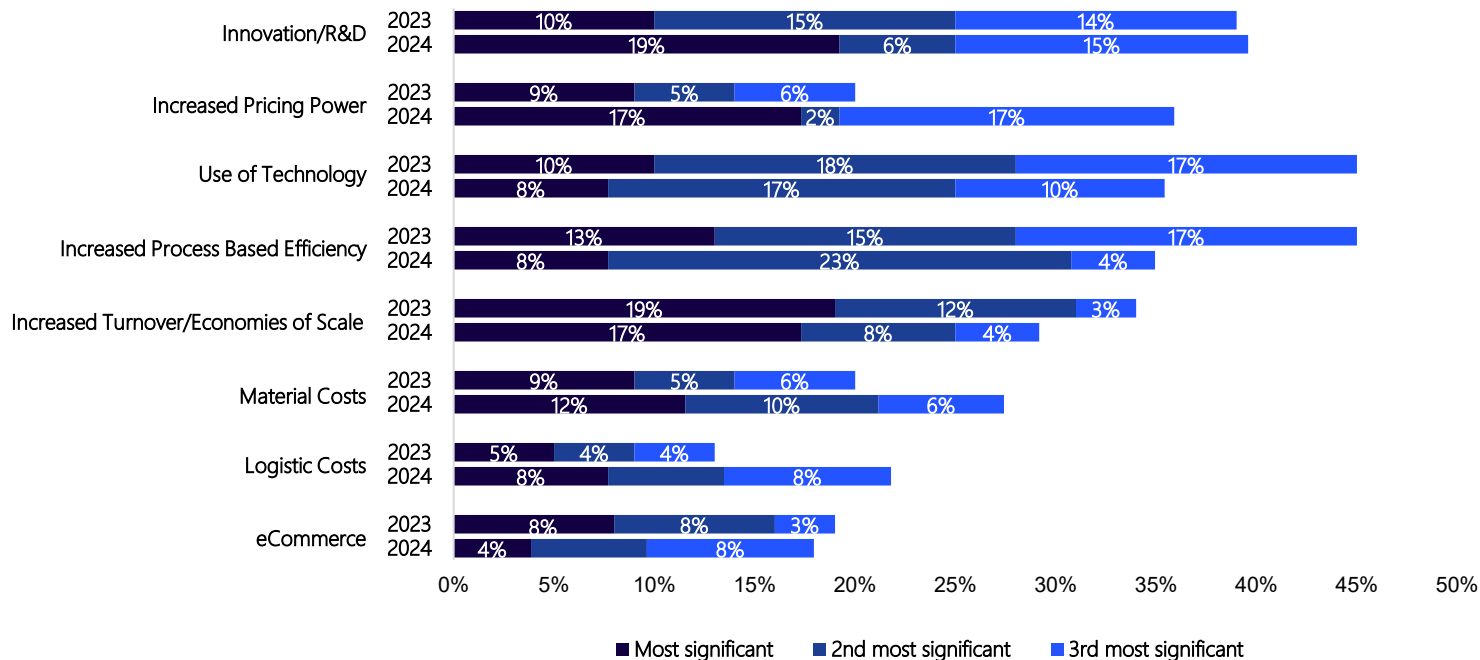
Profit Margin

Profit as a % of Revenue from 2016 to 2024



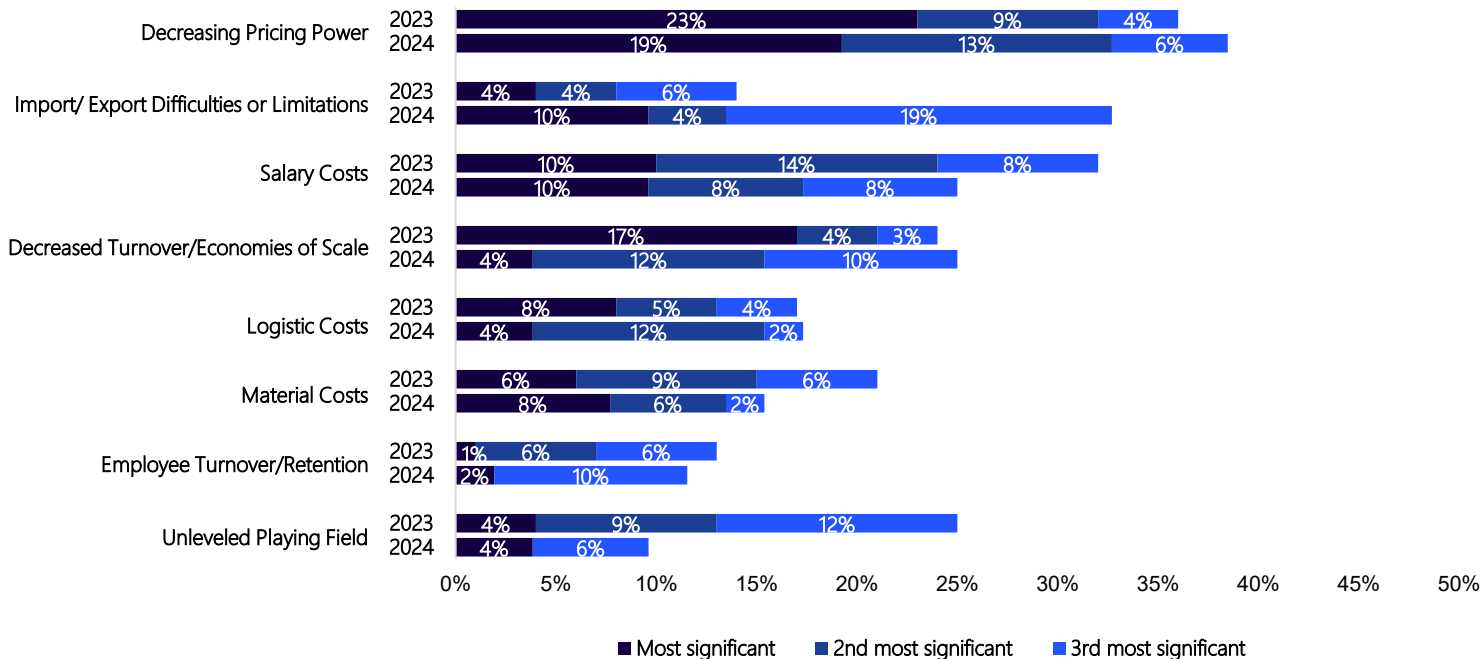
Positive Drivers

Most Significant Positive Drivers



Negative Drivers

Most Significant Negative Drivers

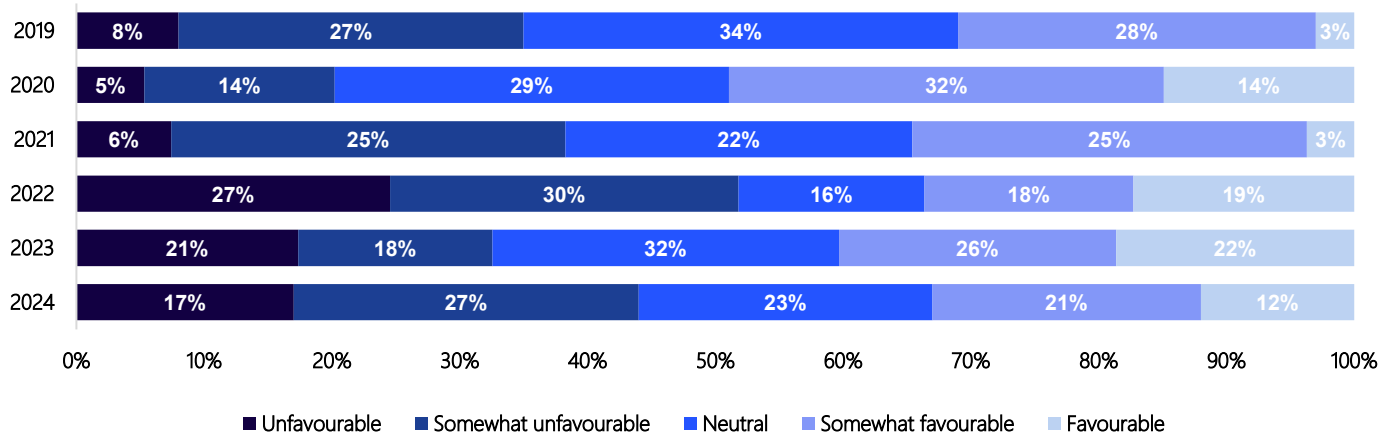




Business Sentiment

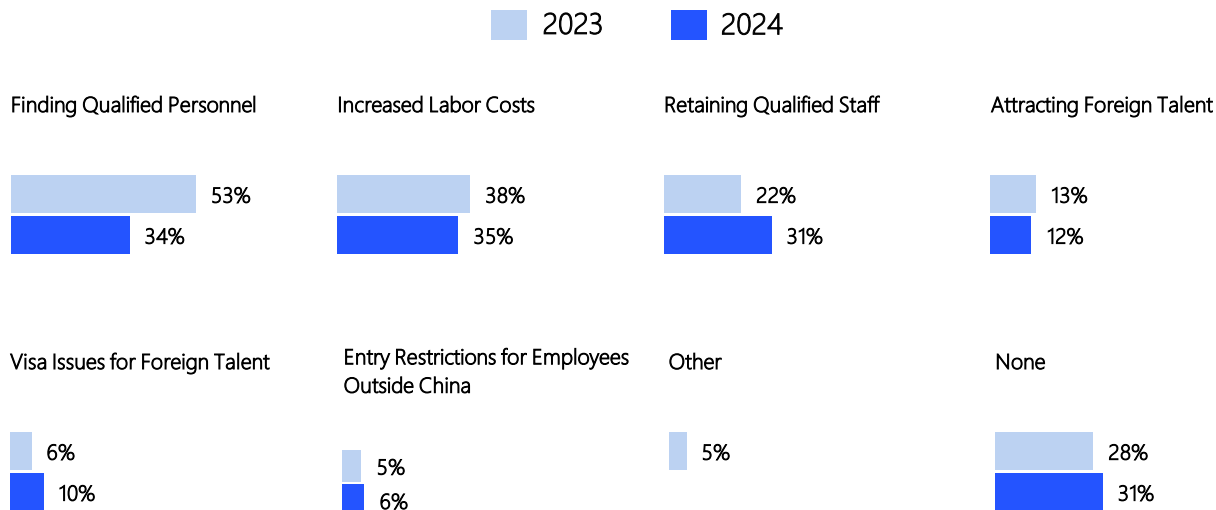
Perception of the Chinese Market

Perception of the Chinese Market 2019-2024



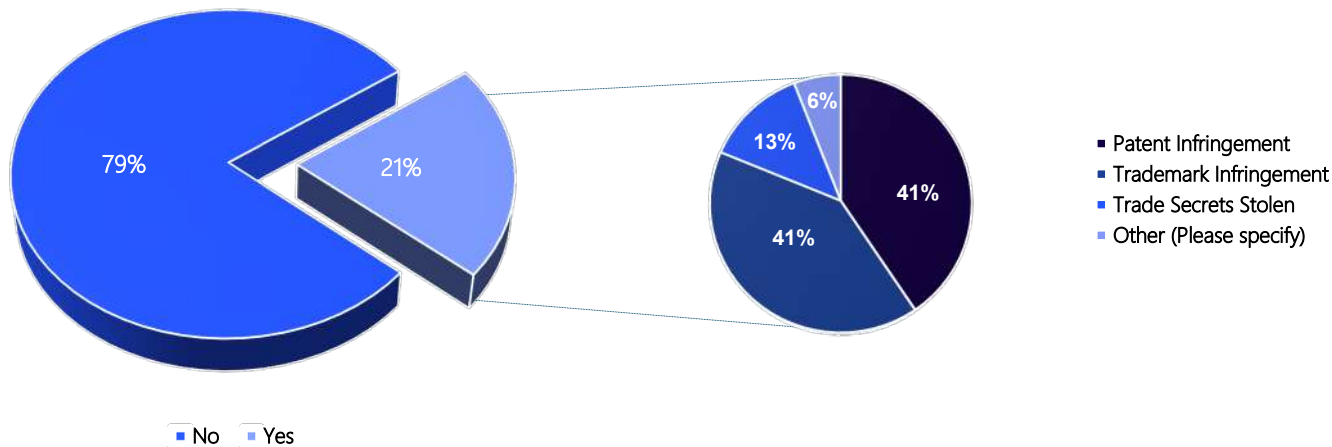
HR Challenges

Did you experience any of the following HR challenges in 2024?



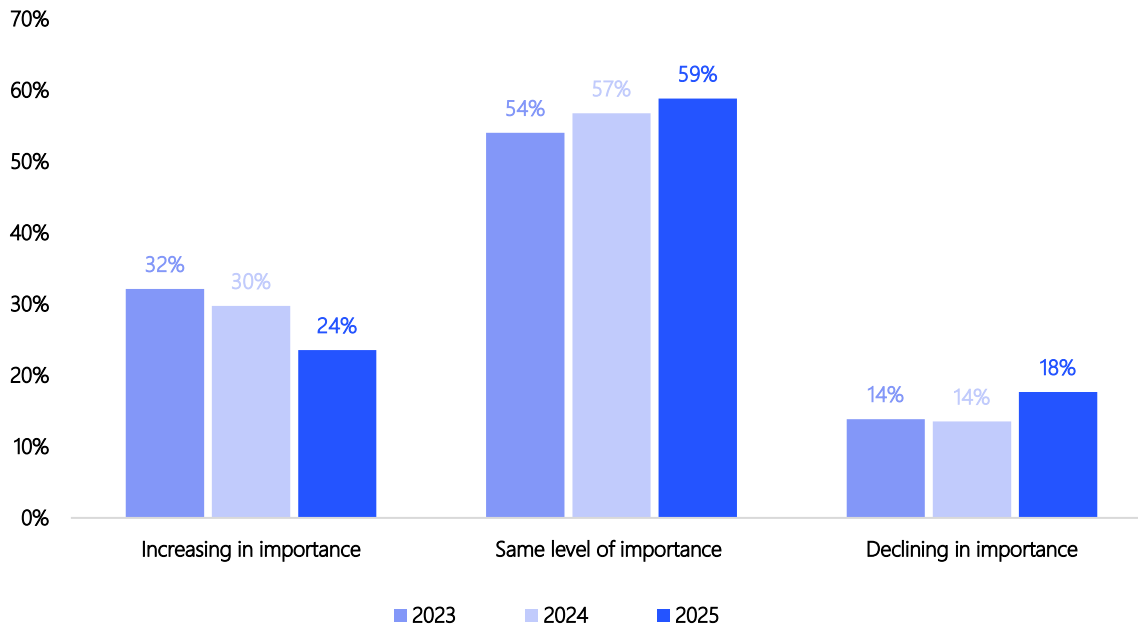
IP Protection Challenges

Have you encountered any of the following IP-issues in 2024?



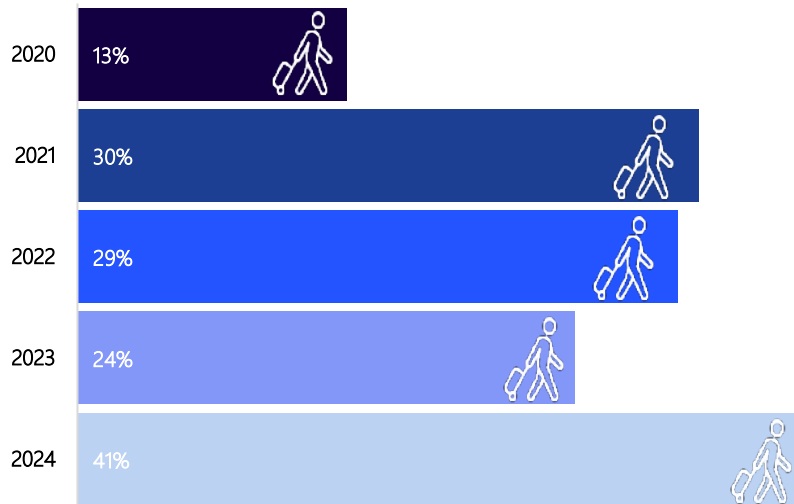
Strategy for China

How important will China be in your group's strategy in the coming two years?



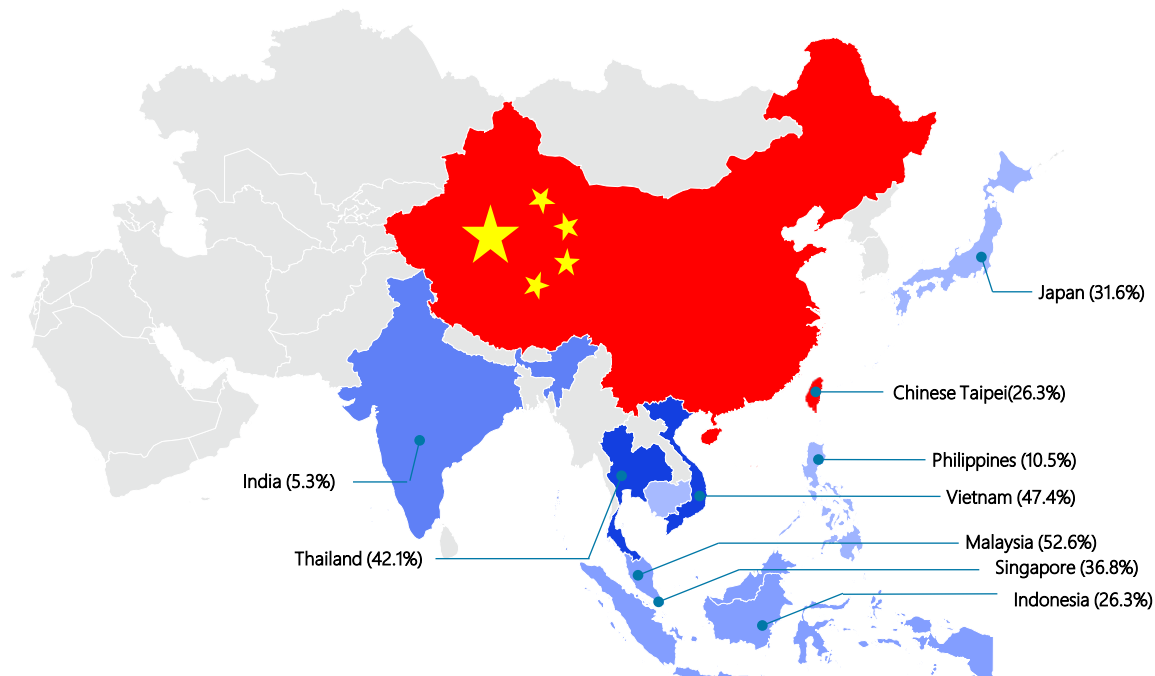
Strategy for China

Do you consider/ are you moving some Chinese activities to other regions?



Leaving China – to where?

Destinations of Companies leaving Mainland China



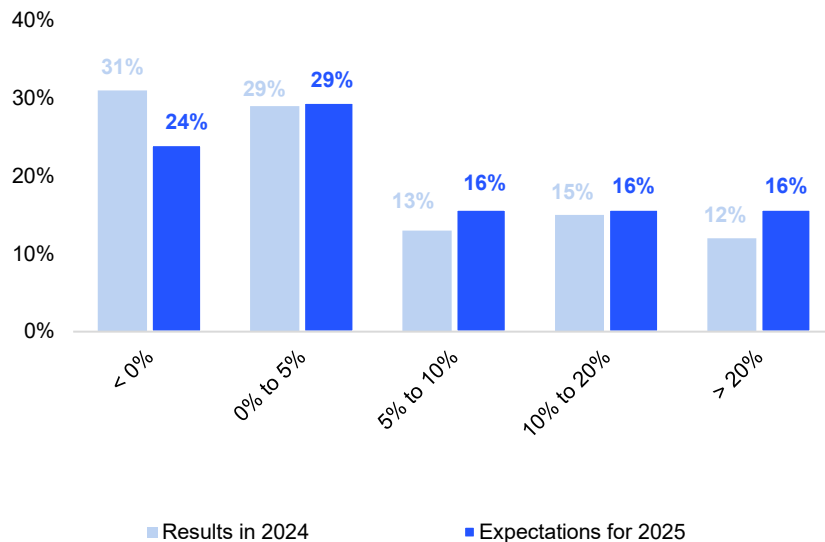
Note: Respondents were asked to which countries/regions they would consider moving their operations. As a result, multiple countries/regions per respondent could be selected.



Onward Expectations

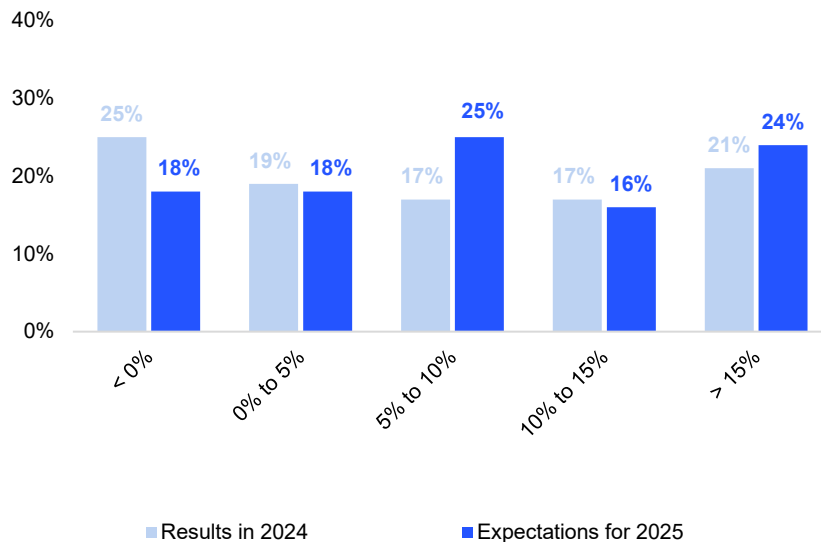
Revenue Growth Expectations

Expected Revenue Growth for 2025



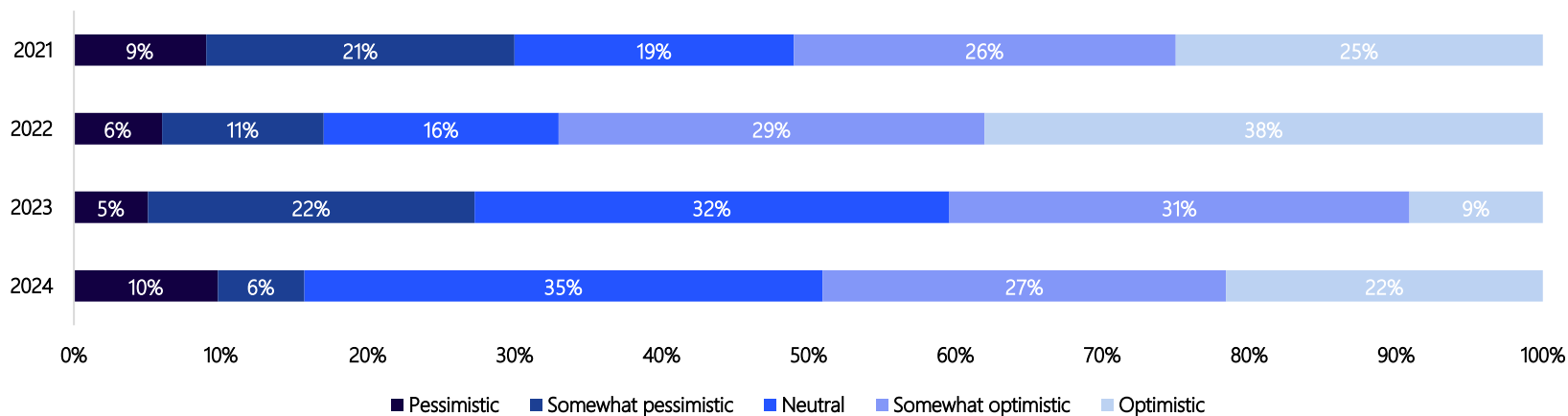
Profit Expectations

Profit Expectations for 2025



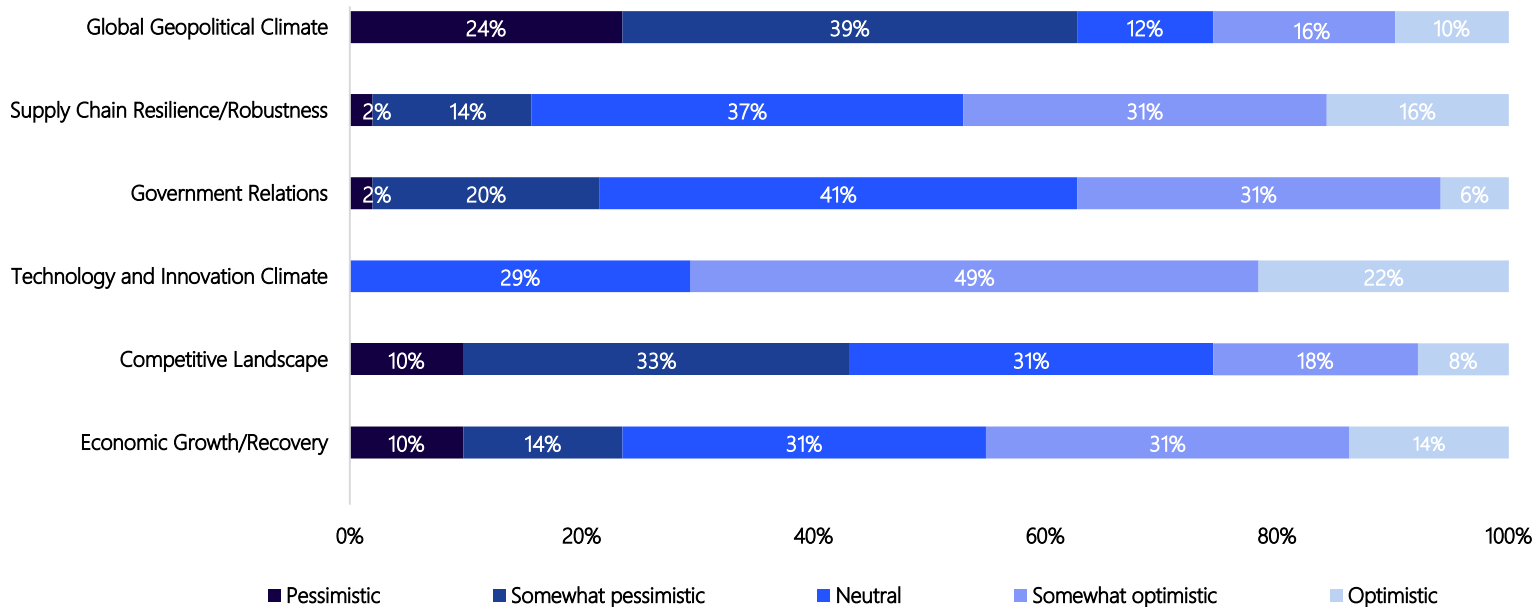
China Investment Strategy

How do you feel about your company's prospects in China for the next 5 years?



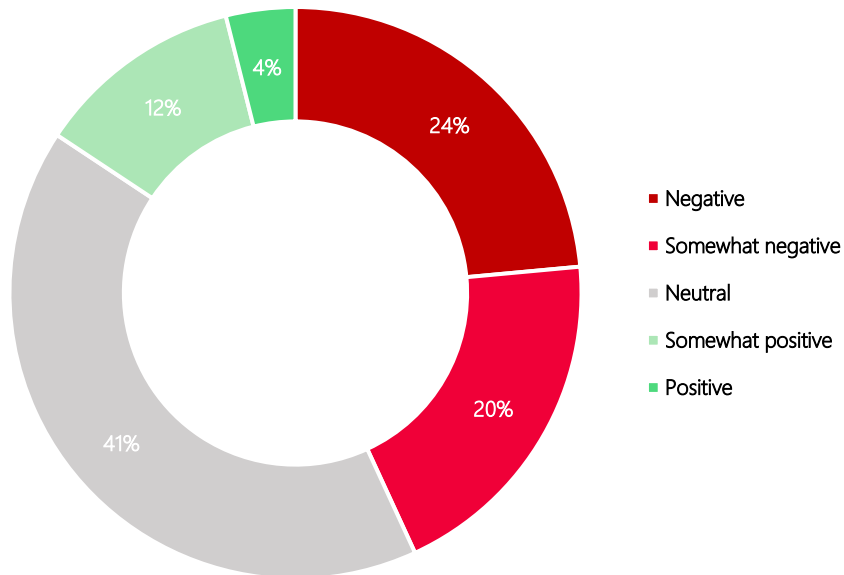
China Investment Strategy

How do you feel about your company's prospects in China for the next 5 years across these business aspects?



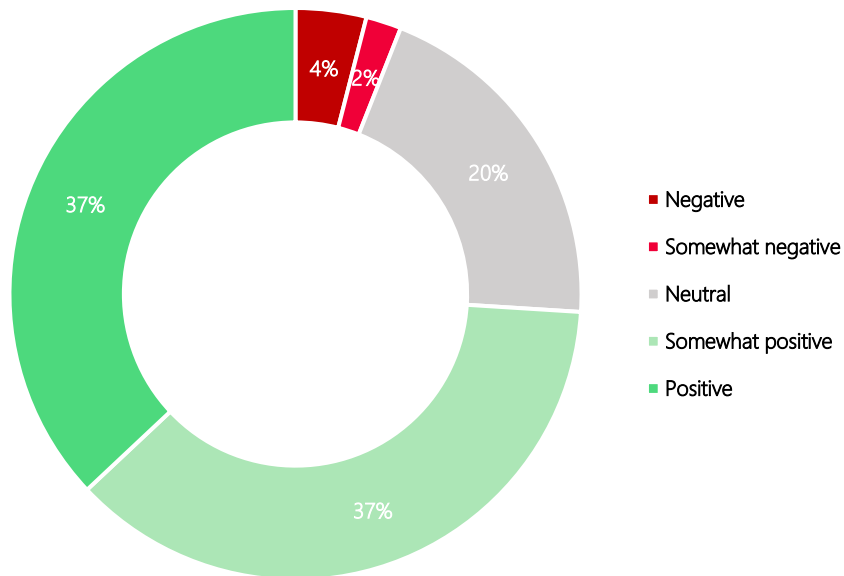
Shifts in US Foreign Policy

In your opinion, how might shifts in US foreign policy following the election affect the China-US?



Eased Visa Requirements

How do you perceive the impact of the eased visa requirements for entry on your China entity's operations?





Conclusion

Closing remarks

Revenue growth shows recovery, with fewer companies reporting declines than last year

Profitability decreased this year, with 75% of respondents reporting being profitable

Innovation and R&D emerged as the top positive drivers this year, followed by increased pricing power

More firms consider relocation to other Asian countries, yet China remains a key market for nearly 70%

Expectations for 2025 are cautiously more optimistic, with improved revenue and slightly stronger profit outlooks compared to last year.

Despite negative perception and performance in the past year, China is expected to remain a crucial market for Benelux businesses



Thanks for your attention!