
Exporting to Southeast Asia's manufacturing hubs

Opportunities for North American companies

June 2026



About us

About Intralink

We're a business development consultancy with a deep specialism in FDI attraction and international trade promotion



Founded in 1990, employee-owned business backed by private equity firm Mobeus Equity Partners



Specialists in investment attraction, trade promotion and international business development services



Sourced and supported over \$20bn in inward investment and export revenues

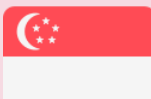


180+ consultants across 27 global locations



Our reach across Asia

Markets where we are present:



We have
11
offices in South,
Southeast and
Northeast Asia



What we do



International Market Expansion

If you're a tech scaleup or SME, we'll help you expand your business in overseas markets



International Corporate Development

If you're a corporate, we'll connect you with the people and ideas to transform your business



International Trade & Investment

If you're a city, region or country, we'll help you grow your exports and attract inward investment



Our clients

Our services



Partner search & matchmaking

We identify, qualify, and engage high-potential distributors, resellers, and direct customers, facilitating pre-vetted business matching meetings that convert market interest into commercial contracts



Sales & business development

We run comprehensive programmes to identify and engage your potential customers and secure sales for you. Our Surrogate Sales Program™ will give you an immediate presence without the costs of having to establish your own operation



Market research

We deliver actionable, sector-specific insights and regulatory roadmaps that help government agencies identify high-growth opportunities and navigate complex international market landscapes



Trade missions & events

We deliver turnkey trade mission support – from market briefings and site visits to high-conversion B2B matchmaking – facilitating high-level engagement between government delegations and pre-qualified international partners

Regional overview

Macroeconomic snapshot



The ASEAN advantage

- Population: close to 700 million
- GDP: over USD 4.51 trillion in 2026– 4th largest economy in the world
- Robust growth of 4.5% in 2025
- FDI inflows rose by 8% to USD 226 billion, as compared with the 11% global decline, underlining the region as an engine of growth
- Trade in goods (two-way) in 2025 was USD 3.5 trillion
- Urban Hubs: more than 50 metropolitan areas over million

Southeast Asia – 4th largest economy in the world

Rank	Country	GDP 2026 (Current USD)
1	US	USD 32.38 trillion
2	China	USD 20.85 trillion
3	Germany	USD 5.45 trillion
4	Japan	USD 4.38 trillion
5	UK	USD 4.26 trillion
6	India	USD 4.15 trillion
7	France	USD 3.6 trillion
8	Italy	USD 2.74 trillion
9	Russia	USD 2.66 trillion
10	Brazil	USD 2.64 trillion
16	Indonesia	USD 1.54 trillion

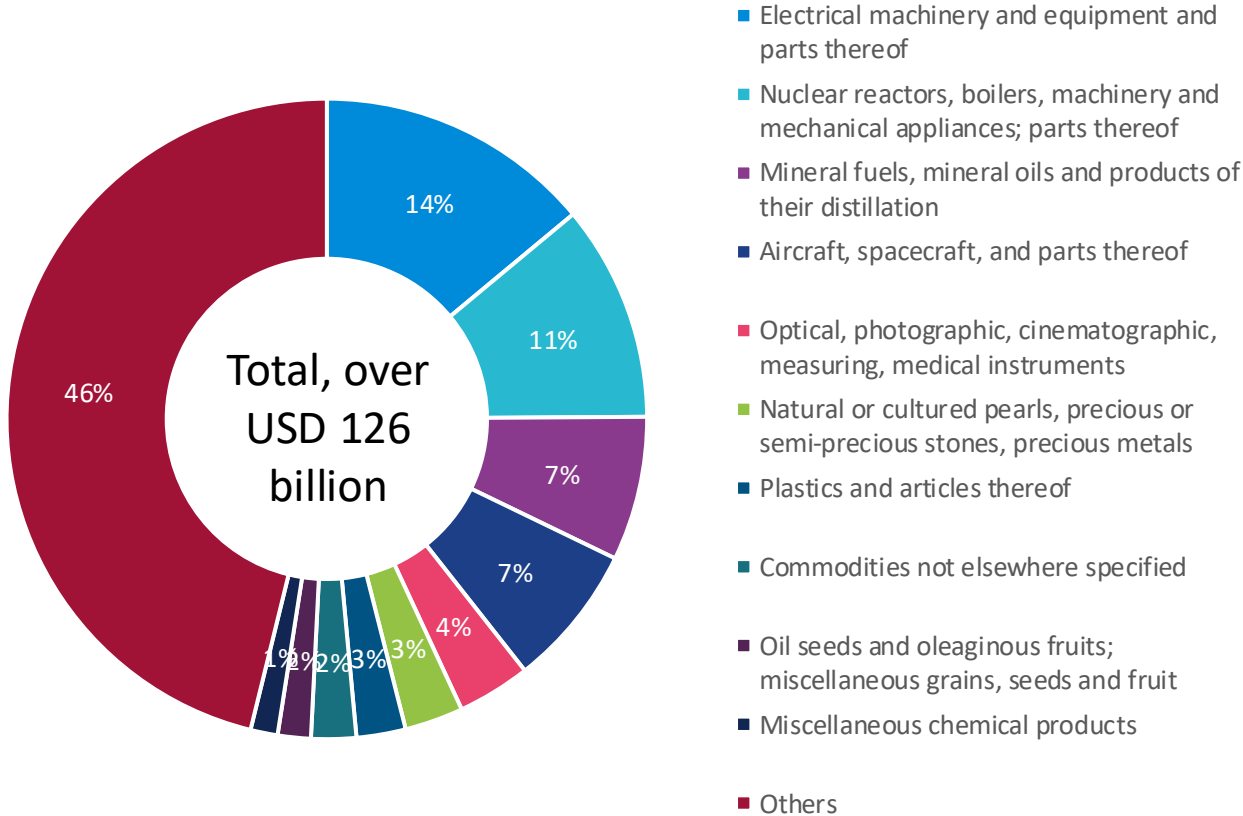
SE Asia
GDP:
USD 4.51
trillion

Source: IMF

US export markets in Southeast Asia

As a region, ASEAN is the US' third largest export market

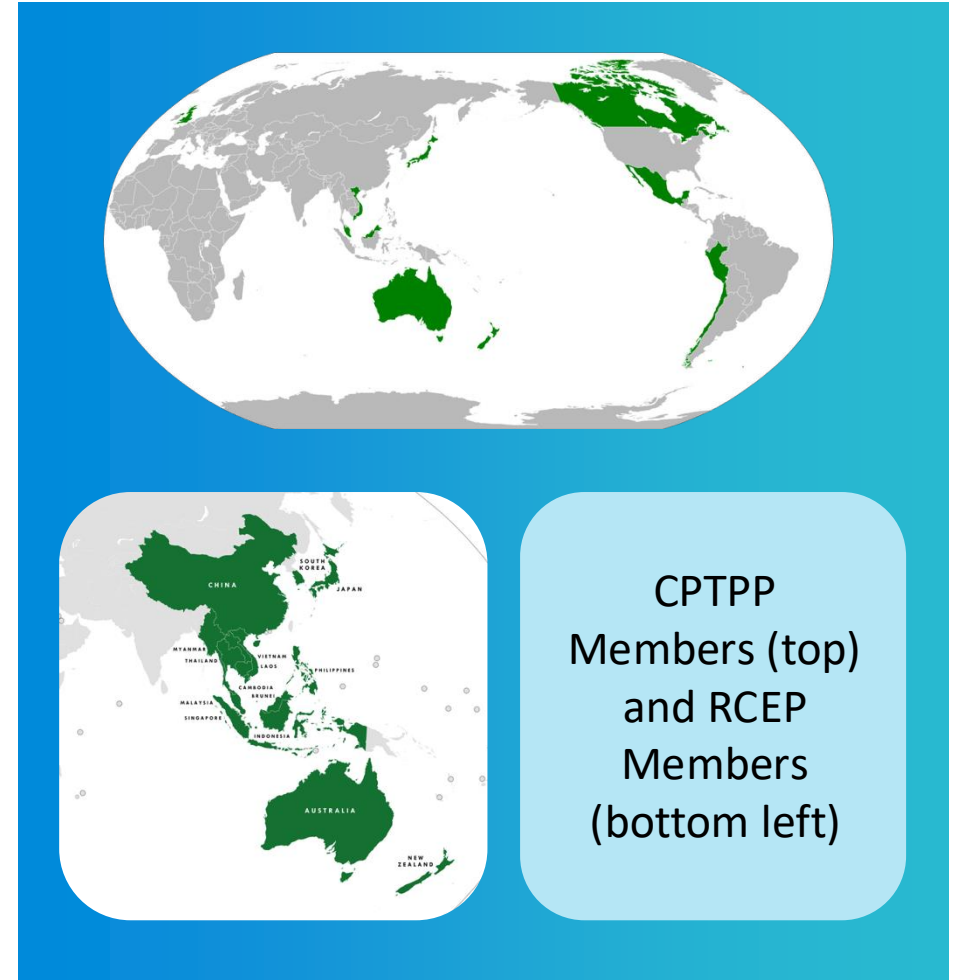
Country	Export Value (2025)
Singapore	USD 42 billion
Malaysia	USD 29 billion
Thailand	USD 19 billion
Vietnam	USD 16 billion
Indonesia	USD 11 billion
Philippines	USD 9.1 billion
Cambodia	USD 0.37 billion
Brunei	USD 0.10 billion
Myanmar	USD 0.07 billion
Laos	USD 0.02 billion



FTAs in Southeast Asia

Key free trade agreements include:

- **Regional FTAs:**
 - Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)
 - Regional Comprehensive Economic Partnership Agreement (RCEP)
- **Bilateral FTAs:**
 - Singapore: US, UK, EU, Australia, Turkey, Israel, EFTA
 - Malaysia: Australia, Pakistan, Turkey, Chile
 - Thailand: Chile, Peru, Australia
 - Vietnam: UK, EU, Israel, UAE
 - Philippines: EFTA
 - Indonesia: Pakistan, UAE, Chile, Australia, EFTA



Country highlights

Currency: USD

Singapore



Population:
6.1 m

GDP: 660 bn

GDPpc:
107,800

- Advanced, high-income economy with strong institutions
- Strong finance, logistics, and technology sectors
- Highly trade-dependent
- Gateway for ASEAN market entry; headquarters for MNCs

Malaysia



Population:
34.2 m

GDP: 516 bn

GDPpc:
15,090

- Export-oriented economy with developed infrastructure
- Global hub for semiconductor and electronics manufacturing
- Developed halal industry serving global markets, from food to finance

Thailand



Population:
71.6 m

GDP: 580 bn

GDPpc:
8,100

- Regional automotive manufacturing powerhouse
- Major food processing and agricultural exporter
- Strong retail and modern trade penetration
- Strong hospitality, healthcare, and medical tourism sectors

Country highlights

Currency: USD

Vietnam



Population:
103.1 m

GDP: 527 bn

GDPpc:
5,100

- One of Asia's fastest-growing manufacturing economies
- Leading export hub for electronics, smartphones, and consumer goods
- Competitive labor costs attracting FDI
- Growing middle class and consumer market

Philippines



Population:
115.3 m

GDP: 512 bn

GDPpc:
4,400

- Large, consumption-driven economy
- Young, English-speaking workforce. Strong BPO sector
- Archipelagic geography creates logistics complexity
- US ally with strong Western business links

Indonesia



Population:
287.2 m

GDP: 1.54 tn

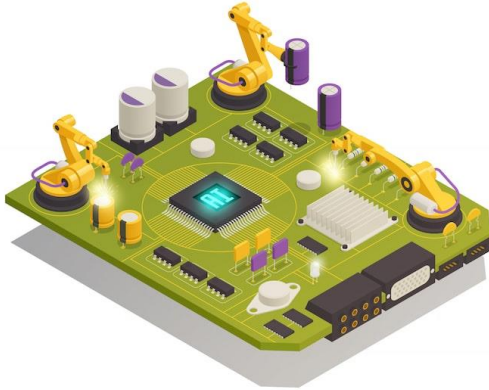
GDPpc:
5,400

- Largest economy and consumer market in Southeast Asia
- Fast-growing digital economy
- Rich nickel reserves support EV battery ambitions
- Strong growth potential but complex market entry

Sector overviews



Electronics & semiconductors



Regional picture

The electronic industry is one of the most dynamic in the region. Some of the key highlights include:

- The electronics industry accounts for 20% to 50% of the export value of most SEA countries
- Southeast Asia now produces much of the world's consumer electronics, including televisions, computers, and smartphones

Focus markets:

Malaysia

- Leading semiconductor hub, accounting for 13% of global back-end semiconductor services
- Penang is the core cluster, hosting Intel, Infineon, AMD, Bosch, Renesas, Osram; the “Silicon Valley of the East”

Singapore

- Critical node: 10% of global chip output, 5% of wafer fab capacity, 20% of semiconductor equipment production
- Strength in high-value activities: chip design, wafer fabrication, R&D, and regional headquarters functions

Vietnam

- Electronics manufacturing powerhouse and key China+1 beneficiary, with Samsung accounting for 15% of exports
- Semiconductors are priority: expanding packaging/testing capabilities complementing electronics manufacturing

Automotive



Regional picture

With low car-ownership rates and growth in population and incomes, the industry is poised for growth:

- Vehicles manufactured in ASEAN are not only sold locally but also exported to Australia, New Zealand and the Middle East
- The region is amid a shift towards EVs

Focus markets:

Thailand

- Thailand is Southeast Asia's largest auto manufacturing hub and a global powerhouse for 1-ton pickup trucks
- Fastest-moving ASEAN EV manufacturing base; targets EVs at 30% of domestic vehicle production by 2030

Indonesia

- Largest automotive market in SEA, with strong potential in low-cost vehicles, motorcycles, commercial vehicles
- EV ambitions are anchored in its nickel position; Indonesia accounts for 60% of global nickel production

Vietnam

- Growing assembly base, especially for passenger vehicles, motorcycles, and increasingly EVs, led by VinFast
- Strong opportunity in charging infrastructure, batteries, components, software, fleet electrification, and aftersales

Chemicals & petrochemicals



Regional picture

SEA is a leading manufacturing hub for different products. Some recent key trends include:

- Emergence of high value-added products such as plastics or polyethylene
- Gradual development of bioplastics and biofuels, complementing traditional petrochemicals

Focus markets:

Singapore

- Jurong Island hosts more than 100 global energy and chemical companies including ExxonMobil, Shell, BASF
- Strong in specialty chemicals, intermediates, performance materials, lubricants, and chemical trading

Thailand

- Southeast Asia's largest integrated petrochemical producer, major players PTTGC and SCG Chemicals
- Eastern Economic Corridor (EEC) attracts investments in high-value chemicals and specialty materials

Malaysia

- The Pengerang Integrated Complex (PIC) is one of Asia's largest refinery-petrochemical developments
- Global leader in oleochemicals, supplying ingredients for personal care, cosmetics, detergents, food ingredients

Medtech & pharma



Regional picture

Southeast Asia's medtech/pharma is developing rapidly, driven by rapidly aging populations and hospital expansion (private segment)

- Regional manufacturing is moving from basic products toward higher-quality devices
- The region remains import-dependent for many high-end products

Focus markets:

Singapore

- Regional hub, strong in biologics, vaccines, cell therapy, sterile injectables, precision medicine
- Produces 60% of the world's microarrays and one third of the world's thermal cyclers and mass spectrometers

Thailand

- Counts 580 local manufacturers, heavily export-oriented. Focus on consumables, syringes, dental products
- Pharma manufacturing is well established in generics, OTC medicines, supplements, and hospital drugs

Malaysia

- The country currently supplies 65% and 80% of global demand for rubber gloves and catheters
- Moving into sophisticated devices: coronary catheters, in-vitro diagnostic and cardiovascular devices

Textiles & apparel



Regional picture

The textile and apparel industry has a long history in Southeast Asia. Some of the key highlights include:

- An integrated regional production network allows each country to focus on specific components
- Today, the region is also emerging as the newest hub for fashion brands to grow and develop innovative ideas in e-commerce and sustainability

Focus markets:

Philippines

- Around 80% of the country's exports go to the US, with the rest going to the EU, Australia, Canada, and others
- The industry is striving to improve efficiency in order to compete with regional peers such as Vietnam

Vietnam

- With over 6,000 manufacturers, Vietnam holds a 12-30% market share in the global industry
- Vietnam accounts for around 20 per cent of US apparel imports

Indonesia

- The country is particularly strong in upstream/midstream textiles (polyester, rayon, yarn, fabrics, synthetic fibers)
- About 75% of Indonesian consumers express a willingness to pay more for sustainable apparel options

FMCG



Regional picture

Multinationals and local champions both play major roles, often producing locally to reduce costs, adapt formulations:

- Non-F&B FMCG manufacturing is highly localized
- Producers adapting to price-sensitive consumers, small-pack formats, halal requirements, tropical climates, and fragmented retail channels

Focus markets:

Indonesia

- Strong in halal cosmetics and personal care; local players have built strong production and brand ecosystems
- Manufacturing is highly domestic-market oriented. Focus on mass affordability, small formats, high-volume

Thailand

- Regional OEM/ODM manufacturing hub for cosmetics, skincare, personal care, household care
- Manufacturing is more export-oriented and quality-focused than many peers

Philippines

- Strong local and multinational production presence, including Unilever, P&G, Colgate-Palmolive, Splash
- Manufacturing shaped by the “sachet economy”: small-pack, affordable, high-frequency purchases

F&B manufacturing



Regional picture

This key industry accounts for over 10% of the region's GDP. Some important characteristics include:

- Focus on food security, local production, import substitution, and value-added processing, especially after supply-chain shocks and food inflation
- Shift from raw agricultural output toward processed foods, cold chain, packaging, automation

Focus markets:

Thailand

- Powerhouse with 10,000 food processing companies; exports include, pineapple, poultry, seafood, ready meals
- Advanced ecosystem for food machinery, packaging, cold chain, and export-oriented OEM manufacturing

Vietnam

- Food manufacturing increasingly sophisticated as local firms and foreign investors expand production
- Dairy stands out: domestic fresh milk meets 40% of production needs, dairy imports exceed USD 1.2 bn

Indonesia

- Major local players (Indofood, Mayora, GarudaFood) operate vertically integrated facilities; focus on halal
- 2 million small and micro F&B processors; they need to lower unit costs compete with large manufacturers

Opportunities for North American companies

The background features a gradient from dark blue on the left to purple on the right. Overlaid on this are several overlapping circles in various shades of blue and purple, creating a layered, abstract effect.

Opportunity areas

Automation, robotics & physical AI



As Southeast Asian manufacturers face rising labor costs, labor shortages, and quality requirements, demand is increasing for **industrial automation, robotics, machine vision, AI-enabled production systems, and smart factory technologies** that improve productivity and consistency.

Advanced manufacturing equipment



Southeast Asian manufacturers are moving beyond high-volume production into more specialized and higher-value products. This shift is creating demand for **precision machinery, processing equipment, testing systems, cleanroom technologies, and advanced production tools**.

Sustainability & energy efficiency



Growing pressure from customers, regulators, and export markets is driving investments in **energy-efficient equipment, waste reduction, emissions management, water treatment, renewable energy integration, and decarbonization** solutions across manufacturing sectors.

Opportunity areas

Compliance, certification & export readiness



As global trade requirements become more complex, Southeast Asian manufacturers increasingly require support with **product certification, quality standards, regulatory compliance, ESG reporting, and market-specific export requirements** to access international markets.

Traceability & digital supply chains



Manufacturers are investing in **traceability, supply chain visibility, serialization, digital documentation, and data management systems** to meet customer requirements, strengthen resilience, and comply with evolving sustainability and sourcing regulations.

Engineering & specialized industrial services



Many Southeast Asian manufacturers rely on external expertise for **plant design, process optimization, testing, validation, maintenance, training, and technical consulting**, particularly when they need to upgrade facilities or adopt new production technologies.

Final considerations

The background features a blue-to-purple gradient. In the lower right quadrant, there are several overlapping semi-circles. The largest one is a medium blue, with smaller ones in a darker blue and a purple color overlapping it.

Entering the market – market entry considerations



Conduct research. Prioritize countries based on readiness, competition, and accessibility



Build market entry around partners, not only direct end-user selling



Consider how servicing capabilities would work before scaling aggressively



Localize pricing, features, support, and messaging for customer fit



Address regulatory requirements early to avoid costly market-entry delays

Entering the market – tactical considerations



Plan for longer sales cycles where trust, internal alignment and budget approval take time



Identify budget owners and technical influencers and procurement processes



Build local proof points through pilots, demos and live installation visits



Equip local partners with clear value propositions, ROI evidence and reference cases



Use exhibitions and associations to build market visibility and develop inbound demand

Entering the market – cultural considerations

What to know

- The level of formality in communication varies.
- Unlike in Western countries, where deals are primarily transactional, business in this region is deeply rooted in relationships and personal connections.
- Building trust takes time and often requires face-to-face interactions.
- Respect for hierarchy and seniority is deeply ingrained in business culture across Southeast Asia.
- There is also an emphasis on consultation and consensus-building. Business meetings often follow a structured order where senior individuals speak first.

The concept of “face”



The concept of “face” refers to a person’s reputation, dignity, and social standing.

Maintaining face is critical in Southeast Asian business culture, and causing someone to lose face—whether by criticizing them in public, rejecting ideas too directly, or putting them in an uncomfortable position—can business prospects.

Our references



Project references



Partner search & matchmaking



Sales & business development



Market research



Trade missions & events

Industrial automation & control (Malaysia and Singapore)

- Facilitated a business matching program for a Michigan-based distributor of motion control, fluid power, and automation products to explore opportunities in Malaysia and Singapore

High-performance lubricants (Philippines)

- Collaborated with a global manufacturer and distributor of high-performance lubricants, serving the industrial and automotive industries, to provide business matching services in the Philippines

Industrial equipment (Vietnam)

- Assisted a US-based company specializing in equipment for the plumbing, HVAC, and construction industries with meetings with potential buyers in Vietnam

Project references



Partner search & matchmaking



Sales & business development



Market research



Trade missions & events

Smart material handling (Thailand)

- Helped a smart factory, intelligent material-handling and Automated Guided Vehicle (AGV) solutions provider to develop customer and channel opportunities in Thailand.

Fluid dispensing systems (Vietnam)

- Helped a company seeking to sell fluid dispensing systems to electronics manufacturers in Vietnam by developing a program in collaboration with a local professional hired under our payroll

Industrial chiller systems (Southeast Asia)

- Identified and qualified manufacturing end-user leads across automotive, chemicals, food & beverage, electronics and semiconductors for a Japanese centrifugal chiller manufacturer

Project references



Partner search & matchmaking



Sales & business development



Market research



Trade missions & events

Estonian Ministry of Foreign Affairs (Southeast Asia)

- Developed a suite of market entry reports covering Singapore, Thailand and Indonesia, providing national exporters with analysis into HealthTech, Smart Industry, and Food & Beverage

Precision instruments manufacturer (Southeast Asia)

- Supported a US manufacturer of high-precision temperature measurement instruments in evaluating its customer base and market opportunities across Southeast Asia

Electronics manufacturer (Indonesia & Thailand)

- Helped a US industrial electronics manufacturer assess aerospace and automotive opportunities in Indonesia and Thailand through market research, mapping, and market-entry recommendations

Project references



Partner search & matchmaking



Sales & business development



Market research



Trade missions & events

VEDP (Southeast Asia)

- We are currently the in-market representative in the Southeast Asian region for the Virginia Economic Development Partnership (VEDP), for which we routinely organize trade missions to the region

USDA (Vietnam)

- We organized the largest USDA trade mission to Vietnam which included not just arranging meetings and retail visits, but also involved recruiting buyers from Thailand, Cambodia and Myanmar

Illinois (Indonesia & Malaysia)

- We recently organized a trade mission to Indonesian and Malaysia for the Illinois Department of Commerce & Economic Opportunity. We arranged around 90 meetings for 7 companies across multiple sectors

Why our clients choose us

Extensive regional infrastructure

- We have a **robust, permanent presence** across 11 strategic Asian markets

Direct service delivery model

- Our programmes are executed by **dedicated, full-time in-market teams**

Institutional trade promotion expertise

- We are **well-versed** in the stringent oversight and reporting frameworks essential to public sector partnerships

Sector depth and local fluency

- Our consultants bridge the gap between **technical industry knowledge** and **local commercial culture**

Focus on quality deliverables

- We deliver **specific milestones**, from pre-qualified business matching to comprehensive market intelligence



Q&A

The background features a color gradient from bright blue on the left to deep purple on the right. Overlaid on this are several large, semi-transparent circles in shades of blue and purple, creating a layered, abstract effect.



Alex Barton

Managing Director, Southeast Asia

T: +65 9183 8308

E: alex.barton@intralinkgroup.com

www.intralinkgroup.com

