

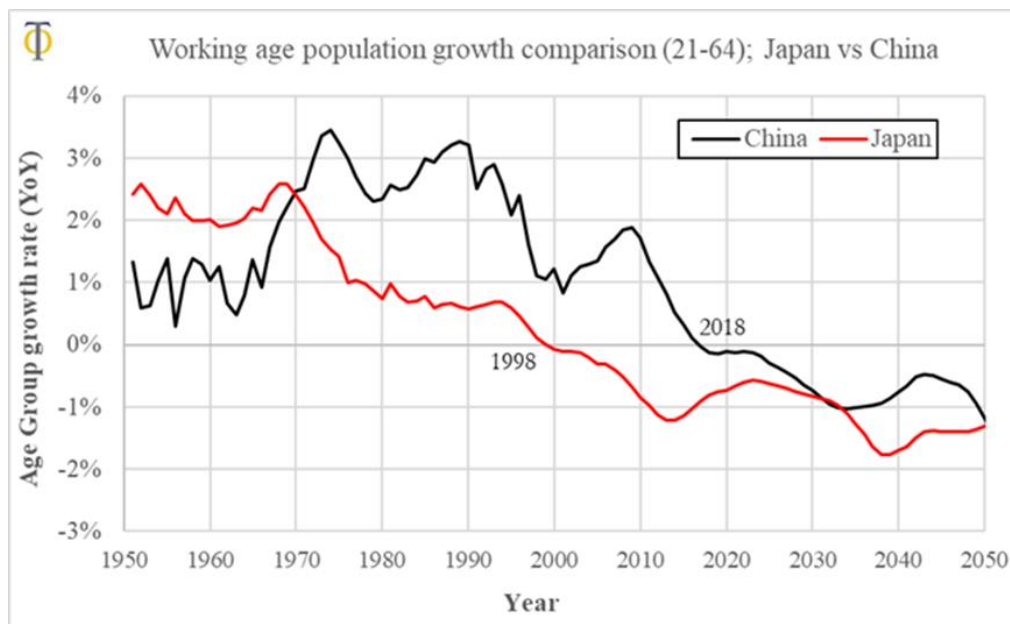
Package: China Economy

October 2025

Understanding China's Challenges

The long-term structural challenges for China

- China's working age population started a steep decline in 2020, which will intensify until 2032.
- Internal consumer demand will be under pressure in the coming decades.
- China needs to rely on exports for keeping its installed capacity running.
- China's economic model represents a geopolitical risk for the rest of the world.
- China's current situation is comparable to Japan in the 1990s, resulting in "two lost decades" of low economic growth and deflationary environment.



The package includes:

- Full 120-page report on China's Economy
- Executive presentation with key insights from the report
- Video where Ed Dowd and Carlos Alegria go through the executive presentation and provide their personal views.
- 2h 1on1 video-conference session with the authors
- Additional information: support@phinancetechnologies.com

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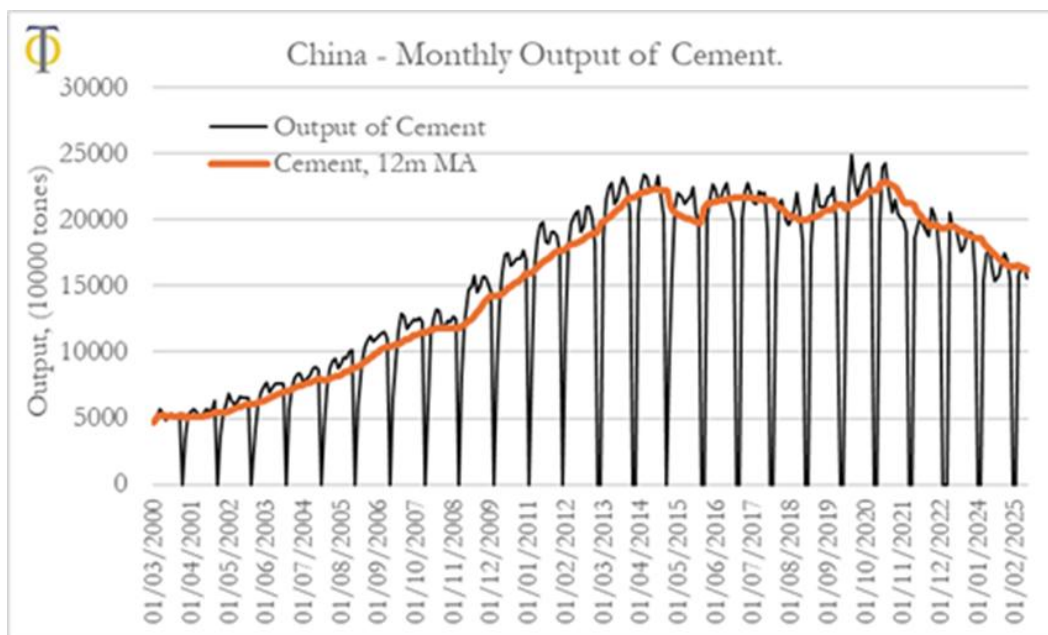
Package: China Economy

October 2025

Understanding China's Challenges

Ongoing real estate crisis (short-term)

- Real estate new building starts dropped off a cliff from 2022 to 2025, after the Evergrande implosion.
- Real estate buildings under construction were still holding up in 2025, having dropped by only about 15% from its peak in 2022.
- The collapse in land purchases for development and real estate starts point to the crisis deepening in the years ahead.
- The housing bubble is due to massive oversupply and not by rising prices.
- The real estate crisis is the start of a decades long economic restructuring.



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