ASEAN will become the fourth largest economy in the world by 2030, led by the US, China and the EU.

The Association of Southeast Asian Nations (ASEAN), a trade-driven block of 10 Southeast Asian nations, established on 8 August 1967, is of vital geostrategic importance to the world. With a population of some 650 million and fast-growing wealth it is also becoming an economic superpower.

Ranking as the fourth largest exporting region in the world, the countries that constitute ASEAN account for some 7% of global exports. They had a combined GDP of US$2.99 trillion in 2018, making them the third largest economy in Asia and the sixth largest globally. Economic growth continues to average 5.4%, way above the global average and this rate is forecast to continue for the near future.

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Welcome to ASEAN – a dynamic region in the world. With a population of 650 million and the economic growth of 5.4 percent, ASEAN is also becoming an economic superpower. Ranking as the fourth largest exporting region in the world, the countries that constitute ASEAN account for some 7% of global exports. Significant growth opportunities are available for German business across a range of industries and commercial sectors, including automotive, financial services, consumer goods, medical services and equipment, digital technology, green energy and infrastructure development. ASEAN is home to more than 3,000 German companies and the second largest trading partner in Asia for Germany, after China. In return, Germany is the largest EU trade partner for ASEAN countries.

The German Chambers ASEAN Business Council as a #PartnerInASEAN are pleased to present the third edition of the ASEAN Snapshot. This publication presents a selection of key economic indicators on ASEAN and information of German-ASEAN business relations. ASEAN Snapshot aims to provide audiences with an overview of the business developments of ASEAN, ranging from demographic, economics, trade and investment as well as the business relations of selected 7 ASEAN-nations with Germany.

With user-friendly charts, infographics and brief texts, ASEAN Snapshot is intended to reach a wide range of users, especially German companies worldwide. We hope you could discover the market potentials in ASEAN and learn more about the ASEAN member states. We look forward to supporting German and ASEAN businesses in enhancing business relations, networking and in experience exchange.
ASEAN presents a compelling investment proposition for businesses who are looking to expand in one of the most dynamic and promising parts of the world.

ASEAN GDP 2019: 3.1 trillion US$

ASEAN GDP growth 2019: 4.8%

ASEAN Population 2019: 649 million

ASEAN land surface 2019: 4.5 million qkm

Member states: Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam.

ASEAN Export 2018:
- Total export: 1.43 trillion US$
- Top export products: Electrical machinery; Mineral fuels and oils; Machinery and mechanical appliances; Plastics; and Vehicles.

ASEAN Import 2018:
- Total import: 1.38 trillion US$
- Top import products: Electrical machinery; Mineral fuels and oils; Machinery and mechanical appliances; Plastics; and Iron and Steel.

ASEAN Trade volume 2018: 2.8 trillion US$

ASEAN net FDI 2018: 153 billion US$

ASEAN Top FDI source countries 2018:
- 23 billion US$ (ASEAN)
- 22 billion US$ (EU-28)
- 10 billion US$ (Hong Kong)
- 10 billion US$ (China)
- 8 billion US$ (US)
- 6 billion US$ (South Korea)
- 2 billion US$ (India)

Free Trade Agreements with:
- China (AECFTA, India-JAFTA, Japan (AJCEP), Australia-New Zealand (AANZFTA) and South Korea.

Source: GTAI, ASEAN Statistics, AHK Vietnam

ASEAN presents a compelling investment proposition for businesses who are looking to expand in one of the most dynamic and promising parts of the world.
The ASEAN markets continuously attract the attention of German investors by being a relatively stable and lucrative option.

German companies are overall confident in ASEAN, having an optimistic view on current and market positions in 2020.*

01 Growing consumer market with 649 million people

German companies see ASEAN as an exciting consumer market, with lots of potential for growth, especially in terms of middle class spending.

02 ASEAN competitive wages

Competitive labor cost is a major factor attracting German companies to this region. ASEAN offers young, motivated and skilled workforces.

03 ASEAN’s status as a major foreign direct investment magnet

FDI into ASEAN has doubled over the past decade. The manufacturing output is likely to expand, supported by an improving regulatory environment and competitive costs.

04 Improving regional integration

The establishment of ASEAN Economic Community AEC, the CPTTP (TPP11) (in which 4 countries in ASEAN participated: Vietnam, Malaysia, Singapore and Brunei) as well as other bilateral FTAs (EU-Singapore and EU-Vietnam) are expected to enhance trade and investment flows to ASEAN.

05 ASEAN strives for leading role in the Industry 4.0

The vision for ASEAN in 2020 is to propel ASEAN towards a digitally-enabled economy that is secure, sustainable, and transformative, and to enable an innovative, inclusive and integrated ASEAN Community. US$ 600 billion will need to be spent on infrastructure to support growth.

* AHK World Business Outlook Survey 2019

Source: ASEAN, AHK Vietnam
<table>
<thead>
<tr>
<th>Country</th>
<th>Total trade with Germany 2019 (billion EUR)</th>
<th>Total trade with Germany 2018 (billion EUR)</th>
<th>Easy of Doing Business Ranking 2020</th>
<th>Surface Area 2019 (km²)</th>
<th>Population 2019 (million)</th>
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<tbody>
<tr>
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</table>

Source: Destatis, GTAI, World Bank
Political stability continues to have the most important influence on a positive business climate and a lack of qualified labor is considered as the second biggest risk to the business climate.

Source: Destatis, GCABC
INDONESIA

The world's fourth biggest country in terms of population, and ASEAN largest economy with more than 40% share of the combined GDP. Indonesia, the only G-20 member state and trillion+ USD economy of ASEAN is after two decades of stable economic growth destined to be among the top 10 major economies in the world.

ECONOMY 2019

Nominal GDP

US$ 1,130 B

Real GDP (YoY)

5%

CPI (yoy % ann avg)

3.1%

ECONOMY OUTLOOK 2021F

Nominal GDP

US$ 1,385 B

Real GDP (YoY)

5%

CPI (yoy % ann avg)

3.8%

Source: GTAI, Destatis, Deutsche Bank

ECONOMY 2019

US$ 168 B

(Herchandise exports)

Real GDP (Nominal)

5%

ECONOMY OUTLOOK 2021F

US$ 164 B

(Herchandise imports)

Real GDP (Nominal)

3.8%

CPI (yoy % ann avg)

3.1%

Source: GTAI, Destatis, Deutsche Bank

GERMAN-INDONESIAN RELATIONS

TOP German export products 2018

Machinery; Chemical products; Other vehicles; Electrical engineering; and Measuring, checking and medical instruments.

TOP German import products 2018

Textile and garments; Footwear; Electronics assembly; Mineral fuels and oils; and Natural resources.

TOP FDI SECTORS 2018

Electricity, gas, steam and water; Real estate; Mining; and Transportation, Warehousing and Telecommunication.

Source: GTAI, Destatis, Deutsche Bank

14 15
Since gaining independence in 1957, Malaysia has successfully diversified its economy from one that was agriculture and commodity-based, to one that is a leading exporter of electrical appliances, electronic parts and components. Malaysia is one of the most open economies in the world, with a trade to GDP ratio averaging over 140 percent since 2010. Openness to trade and investment have been instrumental in employment creation and income growth, with about 40 percent of jobs in Malaysia linked to export activities.

### ECONOMY 2019

- **Nominal GDP**: US$ 364 B
- **Real GDP (YoY)**: 4.5%
- **GDP (Grw Noc arr avg)**: 0.7%

### ECONOMY OUTLOOK 2021F

- **Nominal GDP**: US$ 389 B
- **Real GDP (YoY)**: 4.6%
- **GDP (Grw Noc arr avg)**: 2.2%

### GERMAN-MALAYSIAN RELATIONS

#### TOP German export products 2018
- Electronics assembly
- Machinery
- Chemical products
- Petro chemistry
- Electrical engineering
- Mineral fuels and mineral oils.

#### TOP German import products 2018
- Electronics assembly
- Electrical engineering
- Measuring, checking and medical instruments
- Textile and garments
- Machinery.

#### TOP FDI CONTRIBUTORS 2018
- Manufacturing, services, agriculture, mining, and natural resources.

### ECONOMY 2019 EXPORT VOLUME

- **Nominal exports**: US$ 197.2 B
- **Real exports (YoY)**: 4.5%
- **GDP (Grw Noc arr avg)**: 0.7%

### IMPORT VOLUME 2019

- **Nominal imports**: US$ 168 B
- **Real imports (YoY)**: 2.2%
- **GDP (Grw Noc arr avg)**: 4.6%

### FDI NET INFLOW 2019

- **German FDI stock in 2017**: EUR 5.7B
- **German FDI net inflows 2018**: EUR 457M
- **German FDI stock in 2019**: EUR 8.7B

### ECONOMY 2019 EXPORT VOLUME

- **Growth rate of exports**: 4.5%

### IMPORT VOLUME 2019

- **Growth rate of imports**: 2.2%

### FDI NET INFLOW 2019

- **Growth rate of FDI net inflows**: 4.6%
Export of garments to Germany increased more than 30% in 2017 - trend continues.

Source: World Bank, IMF, GTAI, Destatis, Myanmar Ministry of Commerce, Dica

GERMAN-MYANMAR RELATIONS

Foodstuffs; Garments; Gas; Non-metallic minerals; and Non-ferrous metals.

TOP German export products 2018

Machinery; Chemical products; Electrical engineering; Measuring, checking and medical instruments; and Foodstuffs.

TOP German import products 2018

Textile and garments; Footwear; Non-metallic minerals; and Foodstuffs.

ECONOMY 2019

US$ 66 B

Real GDP (YoY)

6.4%

CPI (yoy avg)

7.9%

ECONOMY OUTLOOK 2021F

US$ 78.8 B

Real GDP (YoY)

6%

CPI (yoy avg)

6.9%

ECONOMIC OUTLOOK 2021F

US$ 86 B

Nominal GDP

6.4%

CPI (yoy avg)

7.9%

GERMAN-MYANMAR RELATIONS

TOP German Export Partners 2018

China, Thailand, Japan, India, Hong Kong, China.

TOP German Import Partners 2018

China, Singapore, Thailand, India, Indonesia.

TOP German Export Products 2018

Foodstuffs, Garments, Gas, Non-metallic minerals, and Non-ferrous metals.

TOP German Import Products 2018

Textile and garments, Footwear, Non-metallic minerals, and Foodstuffs.

TOP FDI Contributors 2018

China, Singapore, Thailand, India, Indonesia.
The current administration has prioritized the development of the country’s infrastructure and intends to spend around $158 billion over the next five years on its “Build, Build, Build” program.

The Filipino population is young with an average age of 23 years, speaks good English, and is consumer-oriented, interestingly, the Philippines has also the narrowest Global Gender Gap in ASEAN.

Source: GTAI, Destatis, Deutsche Bank

**ECONOMY 2019**

US$ 358 B  Real GDP

5.9%  Nominal GDP

US$ 391 B  Real GDP

6.4%  Nominal GDP

GERMAN-PHILIPPINE RELATIONS

**TOP German export products 2018**

- Other vehicles
- Electronics assembly
- Machinery
- Chemical products
- Foodstuffs

**TOP German import products 2018**

- Electronics assembly
- Foodstuffs
- Chemical products
- Machinery
- Measuring, checking and medical instruments

**ECONOMY OUTLOOK 2021F**

US$ 351.7 B  Nominal GDP

5.9%  Real GDP

2.5%  CPI (YoY avg)

6.4%  Real GDP

3.5%  CPI (YoY avg)

GERMAN FDI NET INFLOW 2019

US$ 4.3 B

ECONOMY 2020

US$ 351.7 B  Nominal GDP

**ECONOMY 2019**

US$ 391 B  Nominal GDP

5.9%  Real GDP

2.5%  CPI (YoY avg)

**ECONOMY 2021F**

US$ 358 B  Nominal GDP

5.9%  Real GDP

2.5%  CPI (YoY avg)
Singapore is one of the world’s greenest cities and ranks #1 in Asia for sustainability. The Sustainable Cities Index by Arcadi ranks 100 global cities according to three facets of sustainability: social, environmental and economic. Moreover, Singapore is one of the top cities in the world in terms of ease of doing business. The World Bank’s Doing Business survey looks at measures such as trading across borders, enforcing contracts, getting credit and paying taxes.

Source: GTAI, Destatis, Deutsche Bank, Singapore Department of Statistics

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GERMAN-SINGAPOREAN RELATIONS

ECONOMY 2019

US$ 365 B
Real GDP (YoY)
0.8%

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

GERMAN-ECONOMIC OUTLOOK 2021F

US$ 441 B
Nominal GDP
0.6%

ECONOMY 2019

US$ 345 B
Nominal GDP
0.9%

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

GDP (q/q_ann_avg)

ECONOMY 2019

US$ 441 B
Nominal GDP
0.6%

GDP (q/q_ann_avg)

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

ECONOMY 2019

US$ 345 B
Nominal GDP
0.9%

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
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GDP (q/q_ann_avg)

ECONOMY 2019

US$ 441 B
Nominal GDP
0.6%

GDP (q/q_ann_avg)

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

TOP EXPORT PARTNERS 2018

Electronics assembly; Petrochemistry; Machinery; Chemical products; and Electrical engineering.

TOP IMPORT PARTNERS 2018

Chemical products; Electronics assembly; Machinery; and Petrochemistry.

TOP EXPORT PRODUCTS 2018

Machinery; Other vehicles; Chemical products; Electrical engineering; and Cars.

TOP IMPORT PRODUCTS 2018

Electronics assembly; Petrochemistry; Machinery; Chemical products; and Petrochemistry.

TOP FDI SECTORS 2018

Manufacturing; Financial & insurance services; Wholesale & retail trade; Professional, scientific & technical, administrative & support services; and Real estate.

TOP FDI CONTRIBUTORS 2018

Germany investing in Singapore is one of the world’s greenest cities and ranks #1 in Asia for sustainability. The Sustainable Cities Index by Arcadi ranks 100 global cities according to three facets of sustainability: social, environmental and economic. Moreover, Singapore is one of the top cities in the world in terms of ease of doing business. The World Bank’s Doing Business survey looks at measures such as trading across borders, enforcing contracts, getting credit and paying taxes.

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GERMAN-SINGAPOREAN RELATIONS

ECONOMY 2019

US$ 365 B
Real GDP (YoY)
0.8%

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

GDP (q/q_ann_avg)

ECONOMY 2019

US$ 345 B
Nominal GDP
0.9%

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

GDP (q/q_ann_avg)

ECONOMY 2019

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Nominal GDP
0.6%

GDP (q/q_ann_avg)

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

TOP EXPORT PARTNERS 2018

Electronics assembly; Petrochemistry; Machinery; Chemical products; and Electrical engineering.

TOP IMPORT PARTNERS 2018

Chemical products; Electronics assembly; Machinery; and Petrochemistry.

TOP EXPORT PRODUCTS 2018

Machinery; Other vehicles; Chemical products; Electrical engineering; and Cars.

TOP IMPORT PRODUCTS 2018

Electronics assembly; Petrochemistry; Machinery; Chemical products; and Petrochemistry.

TOP FDI SECTORS 2018

Manufacturing; Financial & insurance services; Wholesale & retail trade; Professional, scientific & technical, administrative & support services; and Real estate.

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GERMAN-SINGAPOREAN RELATIONS

ECONOMY 2019

US$ 365 B
Real GDP (YoY)
0.8%

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

GDP (q/q_ann_avg)

ECONOMY 2019

US$ 345 B
Nominal GDP
0.9%

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

GDP (q/q_ann_avg)

ECONOMY 2019

US$ 441 B
Nominal GDP
0.6%

GDP (q/q_ann_avg)

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

TOP EXPORT PARTNERS 2018

Electronics assembly; Petrochemistry; Machinery; Chemical products; and Electrical engineering.

TOP IMPORT PARTNERS 2018

Chemical products; Electronics assembly; Machinery; and Petrochemistry.

TOP EXPORT PRODUCTS 2018

Machinery; Other vehicles; Chemical products; Electrical engineering; and Cars.

TOP IMPORT PRODUCTS 2018

Electronics assembly; Petrochemistry; Machinery; Chemical products; and Petrochemistry.

TOP FDI SECTORS 2018

Manufacturing; Financial & insurance services; Wholesale & retail trade; Professional, scientific & technical, administrative & support services; and Real estate.

TOP FDI CONTRIBUTORS 2018

Germany investing in Singapore is one of the world’s greenest cities and ranks #1 in Asia for sustainability. The Sustainable Cities Index by Arcadi ranks 100 global cities according to three facets of sustainability: social, environmental and economic. Moreover, Singapore is one of the top cities in the world in terms of ease of doing business. The World Bank’s Doing Business survey looks at measures such as trading across borders, enforcing contracts, getting credit and paying taxes.

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GERMAN-SINGAPOREAN RELATIONS

ECONOMY 2019

US$ 365 B
Real GDP (YoY)
0.8%

ECONOMY OUTLOOK 2021F

US$ 390 B
Nominal GDP
2.6%

GDP (q/q_ann_avg)

ECONOMY 2019

US$ 345 B
Nominal GDP
0.9%
Thailand is the second largest economy in ASEAN, after Indonesia. It is the automotive hub in ASEAN and was in 2018 the 11th biggest vehicle producer in the world, currently pushing to become the next-generation automotive industry base. The Eastern Economic Corridor (EEC) is being developed into a hub for manufacturing, transport and logistics and offers huge investment opportunities. The Board of Investment identified 12 targeted industries which benefit from special investment incentives.

**GERMAN-THAI RELATIONS**

**TOP German export products 2018**
- Machinery
- Chemical products
- Cars
- Electrical engineering
- Electronics assembly

**TOP German import products 2018**
- Electronics assembly
- Machinery
- Electrical engineering
- Foodstuffs
- Vehicles

**TOP FDI contributors 2018**
- Electronics assembly
- Petro chemistry
- Chemical products
- Machinery
- Electrical engineering

**ECONOMY 2019**
- Nominal GDP: US$ 540 B
- Real GDP (YoY%): 2.5%
- CPI (YoY % ann avg): 0.7%

**ECONOMY OUTLOOK 2021F**
- Nominal GDP: US$ 615 B
- Real GDP (YoY%): 2.9%
- CPI (YoY % ann avg): 1%

**ECONOMY VOLUME 2019**
- Export volume: US$ 244.4 B
- Import volume: US$ 217 B
- FDI net inflow: US$ -7 B
Vietnam’s economy is one of the fastest-growing in Asia with the lowest barrier to entry the market, the young, motivated and reliable workforces. Germany and Vietnam have excellent economic relations and Germany enjoys an outstanding reputation in Vietnam, which is unique in this form in the ASEAN region. Moreover, Vietnam is the only country in ASEAN that is in all relevant free trade initiatives in the region, including CPTPP (TPP11) and the FTA between the EU and Vietnam.

The image contains tables and charts showing economic data and trade relations between Germany and Vietnam. The tables compare merchandise exports, imports, and foreign direct investment (FDI) between the two countries. The data includes nominal GDP, real GDP, consumer price index (CPI), and growth rates. The charts illustrate top export and import partners, top export and import products, and top FDI contributors sectors.
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