

ASEAN KEY FIGURES 2019



one vision
one identity
one community



ASEAN Key Figures 2019

The ASEAN Secretariat
Jakarta

The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.
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FOREWORD

I am pleased to present the second edition of the **ASEAN Key Figures**, a publication which was inaugurated last year by Statistics Division of the ASEAN Secretariat (ASEANstats). This publication provides you with a selection of key statistics on ASEAN and their trends. Drawing mainly from the ASEANstats database, this publication aims to provide its audiences with an overview of developments across several dimensions, ranging from demographics, socio-economics, trade and investment, to connectivity.

With user-friendly visualisation, simple data presentation and brief texts, the publication is intended to reach a wide range of users.

This publication is part of the efforts by ASEANstats together with national statistical authorities in ASEAN Member States, which form the ASEAN Community Statistical System, in producing and disseminating high-quality official statistics.

I hope this publication, together with other ASEANstats publications, namely the *ASEAN Statistical Yearbook* and the *ASEAN Statistical Leaflet*, will be useful in your work, study, and daily life.



DATO LIM JOCK HOI

Secretary-General of ASEAN

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INTRODUCTION

ASEAN Key Figures 2019 is the second edition of the newest publication by the Statistics Division of the ASEAN Secretariat (ASEANstats). It has its genesis in the two previous ASEANstats' publications: **ASEAN Economic Community Chartbook** and **ASEAN Community in Figures**, which were discontinued in 2017.

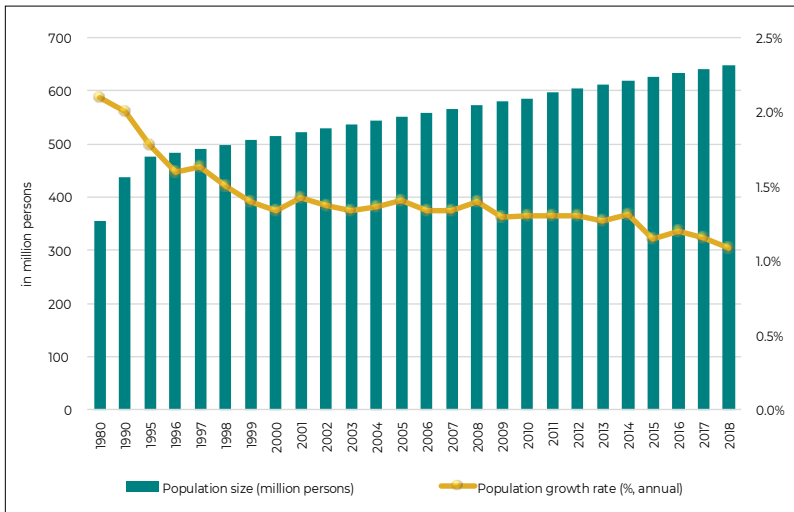
In this publication, a set of indicators has been chosen to portray ASEAN economic and social progress across multiple dimensions. The charts and narrative are presented in a way that is easily read and understood. This publication is a part of the ongoing efforts by ASEANstats to promote the visibility of ASEAN official statistics and ASEAN regional statistical cooperation while contributing to the monitoring of economic and social progress in ASEAN.

The eight topics covered in ASEAN Key Figures 2019 are (1) population, (2) education, (3) health, (4) poverty, inequality and human development, (5) labour, (6) economy, (7) international trade in goods and services and foreign direct investment, and (8) transport, tourism and communication. The data presented in this publication is a subset of a more comprehensive ASEAN statistics which can be found in ASEANstats website (www.aseanstats.org). Online version of this publication, along with other ASEANstats publications, namely **ASEAN Statistical Yearbook** and **ASEAN Statistical Leaflet**, are also available in the website.

Population: size and structure

Over the period of 1980-2018, ASEAN population increased from 355.1 million to 649.1 million, as shown in Figure 1.1. The near doubling in population size was due to natural increases as well as membership expansion, the latter with the accession of Brunei Darussalam to ASEAN in 1984, Viet Nam in 1995, Lao PDR and Myanmar in 1997, and Cambodia in 1999. On average, ASEAN population increased annually by 1.6% between 1980 and 2018.

Figure 1.1. Population size and growth rates, ASEAN total, 1980-2018



Source: ASEAN Secretariat, ASEANstats database.

Figure 1.1 indicates, however, that annual population growth has been in decline over the last four decades, from over 2% prior to 1992 to around 1.1% – 1.2% during the last four years.

A notable change is also observed in the age structure of ASEAN population. Figure 1.2 compares the population pyramids¹ of ASEAN in 2000 and 2018, and indicates a shift in the region's population structure during the last two decades.

In 2000, ASEAN population was generally characterised by high shares of youth population aged 0-19 year old with together represented 40.8% of the region total population. In 2018, while the absolute numbers of youth population increased, the total shares these four age groups² however, dropped to 33.9% in 2018. Compared to female, the share of male youth was higher by 2.0 percentage point in 2000 and by 2.8 percentage point in 2018. On the contrary, the total shares of the age groups in the productive working-age population in the groups of 15-59 years³ increased from 61.4% in 2000 to 61.8% in 2018. Likewise, there is also an observed increase in the shares of the elderly people (aged 65 and over⁴) was recorded from 5.3% in 2000 to 7.5% in 2018.

Figure 1.2. Population pyramid (000 persons), ASEAN total, 2000 and 2018



Source: ASEAN Secretariat, ASEANstats database.

¹ The population pyramid reveals the makeup of the population as a whole by age groups and gender.

² Youth population comprises the following age groups: 0-4, 5-9, 10-14, and 15-19.

³ Productive working-age population comprises the following age groups: 15-19, 20-24, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, and 55-59.

⁴ Elderly population comprises the following age groups: 65-69, 70-74, 75+.

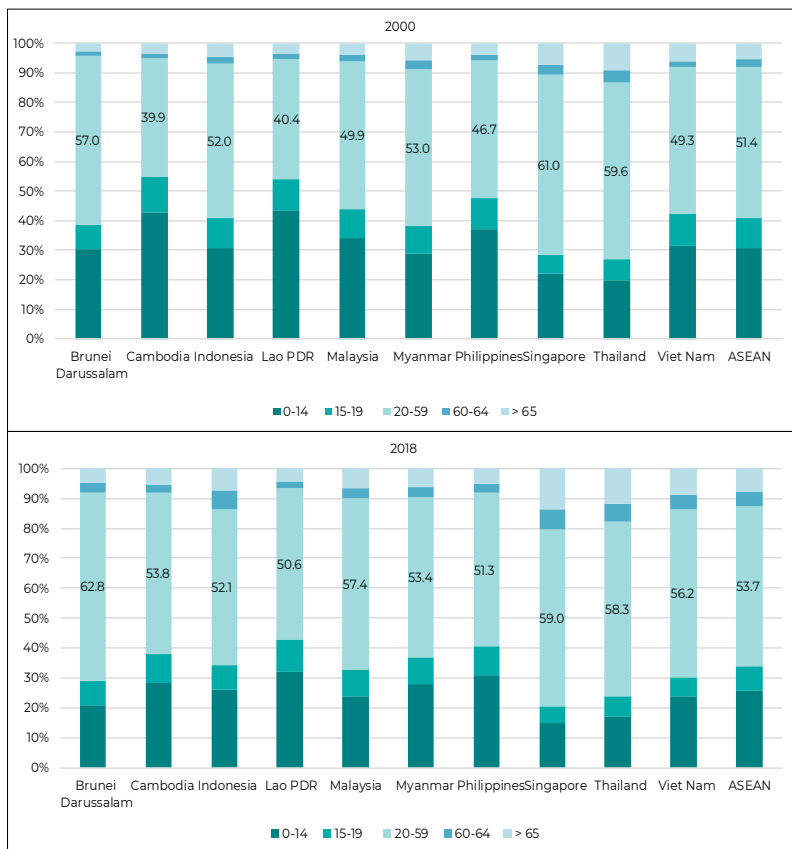
The ASEAN population pyramids also show noticeably larger share of elderly female population aged 65 and over, compared to the male population of the same age groups at 27.3 million (8.3% of total female population) as compared with 21.4 million persons (6.8% of total male population) in 2018. This size differential is reflective of the pattern⁵ that women generally live longer than men. As a result, elderly women tend to outnumber elderly men.

Changes in the patterns of population pyramids over time indicate the ongoing process of demographic transition, associated with declining fertility and mortality levels in ASEAN Member States (AMS). However, the stages of demographic transitions vary across the AMS, reflecting the different levels of development.

Figure 1.3 shows the population age structure across AMS in 2000 and 2018. During this period, all AMS observed an increase in the shares of population aged 65 and over. The most significant increase was found in Singapore and Thailand from 7.2% and 9.1% in 2000 to 13.7% and 12.0% in 2018, respectively. At the same time, all AMS observed declining shares of youth population aged 0-19.

⁵ The higher share of older female population is one of the more consistent features in almost all population pyramids, in any region or country.

Figure 1.3. Population age structure (% to total) by ASEAN Member States, 2000 and 2018.



Source: ASEAN Secretariat, ASEANstats database

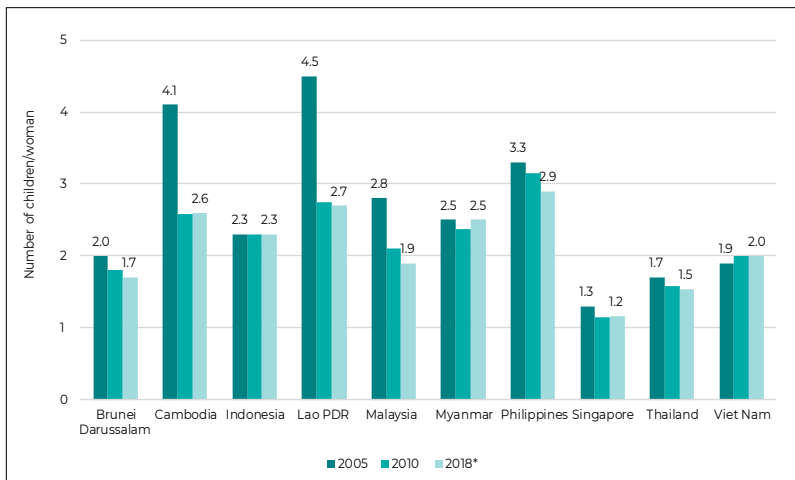
On the other hand, the shares of productive working-age population increased in seven AMS (Brunei Darussalam, Cambodia, Lao PDR, Malaysia, Myanmar, the Philippines and Viet Nam), bringing about potential demographic dividends, which could contribute to economic growth and poverty reduction. At the same time, challenges may also arise in terms of the pressure to provide education as well as health services and create sufficient employment opportunities.

Fertility

Fertility is one of the major contributors to population growth. Based on the most recent data, total fertility rates (TFR) is found to be declining over time in all 10 AMS, except Indonesia (Figure 1.4). Significant decline in TFR was recorded in Cambodia and Lao PDR from 4.1 and 4.5 in 2005 to 2.6 and 2.7 respectively in 2016. In the case of Brunei Darussalam, Malaysia, Singapore, Thailand, and Viet Nam, TFR fell below the replacement level of 2.1 in 2018.

Lower TFR means fewer children as compared to the working-age population. This would provide the opportunity to avail more resources for children and maternal health, education, and other supporting infrastructures. However, sustained low fertility rate would also lead to an aging population, leading to higher burden on the economy through, among others, increased health care and social security costs.

Figure 1.4. Total fertility rates (TFR) by ASEAN Member States, 2005-2018



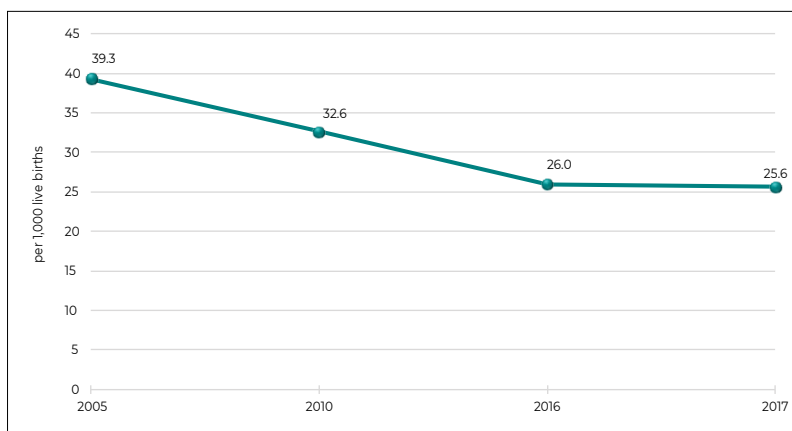
Note: * The latest available data for Cambodia, Lao PDR, Myanmar and Philippines is 2016

Source: ASEAN Secretariat, ASEANstats database.

Mortality and life expectancy

As one of the most widely used mortality indicators, under-five mortality rate can indicate the social, economic, and environmental health conditions of children, including their access to health care. Figure 1.5 shows that under-five mortality rate in ASEAN has experienced a sharp decline during the last decade from 39.3 deaths per 1,000 live births in 2005 to 25.6 deaths per 1,000 live births in 2017. This represents an average annual drop of 2.3 deaths per 1,000 live births over this period.

Figure 1.5. Under-five mortality rates (per 1,000 live births), ASEAN total, 2005-2017

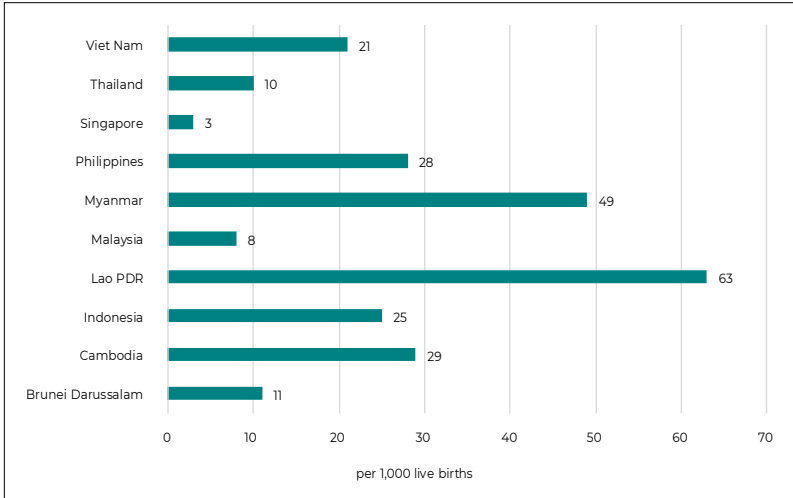


Source: ASEAN Secretariat, ASEANstats database.

Disparity in under-five mortality rates among AMS was, however, noticeable. Figure 1.6 shows that in 2017 under-five mortality rates in the region ranges from very low at three deaths per 1,000 live births in Singapore, moderate at eight and 10 deaths in Malaysia and Thailand, respectively, and high at 49 and 63 in Myanmar and Lao PDR, respectively.

The decline in child mortality is closely associated with longer life expectancy. Life expectancy at birth is defined as the average number of years that a newborn could expect to live if he or she were to pass through life, subject to the age-specific mortality rates of a given period.

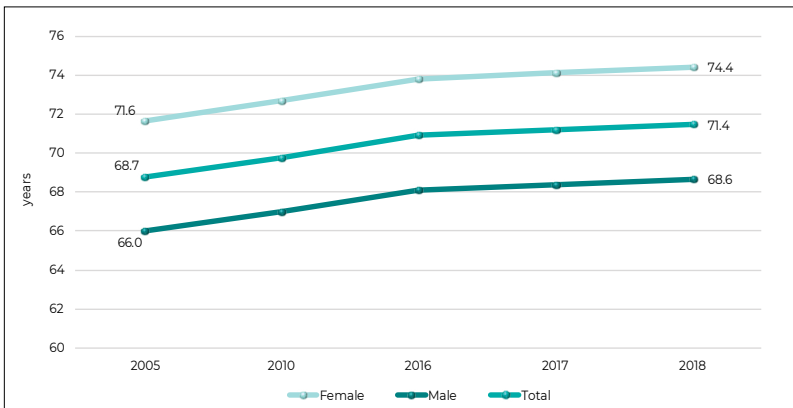
Figure 1.6. Under-five mortality rates (per 1,000 live births) by ASEAN Member States, 2017



Source: WHO (2019), "World Health Statistics 2019: Monitoring Health for the SDGs"

The average life expectancy in AMS reached 71.4 years in 2017, or an increase of over 2.5 years from 2005 (see Figure 1.7). Gender comparison indicates that women, with a life expectancy of 74.4 years in 2017, are expected to live almost seven years longer than men at 68.6 years.

Figure 1.7. Life expectancy at birth (years), ASEAN total, 2005-2017



Source: ASEAN Secretariat.

Life expectancy however varies across the AMS (Figure 1.8). Latest available data shows that life expectancy in the AMS ranges from over 83.2 years in Singapore, between 70 and 80 years in Brunei Darussalam, Thailand, Malaysia, Viet Nam, Indonesia and Cambodia, to below 70 years in the Philippines, Lao PDR and Myanmar.

Figure 1.8. Life expectancy at birth (years) by ASEAN Member States, 2005-2017



Note: * available data for Thailand is 2011; ** latest available data for Lao PDR, Myanmar, Philippines, and Thailand is 2017

Source: ASEAN Secretariat, ASEANstats database.

Introduction

Education is a significant contributor to economic development of a country since it increases capacity and ability of the people to be more productive economically. Adult literacy rate, net enrollment rate in primary education, and net enrollment rate in secondary education are basic indicators to measure the quality of human capital, while pupil to teacher ratio indicates the quality of educational provision in a country.

Adult literacy rate

Compared to seventeen years ago, adult literacy rate has improved significantly across AMS (Figure 2.1). In 2017, adult literacy rate in seven out of ten AMSs exceeded 90%, with the highest rate recorded in Singapore at 97.0% followed by Brunei Darussalam (96.6%), the Philippines (96.5%) and Indonesia (95.5%).

Figure 2.1. Adult literacy rate (%) by ASEAN Member States, 2000-2017



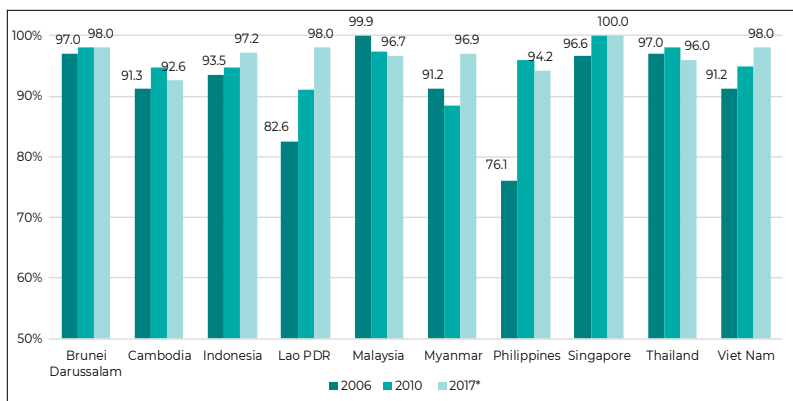
Note: *The latest available data for Brunei Darussalam and Thailand is 2016; for Lao PDR, Myanmar and Thailand is 2015; for the Philippines is 2013

Source: ASEAN Secretariat, ASEANstats database

Net enrollment in primary education

Net enrollment rate (NER) in primary education is measured by the ratio of the number of children of official primary school age who are enrolled in primary education to the total population of children of official primary school age (expressed as a percentage). Primary education is the starting point which normally consists of programmes designed to give pupils a sound basic education in reading, writing, and mathematics along with an elementary understanding of other subjects such as history, geography, natural science, social science, art and music. As shown by Figure 2.2, all AMS have made significant progress in ensuring primary education enrollment. In 2017, all AMS have a rate of more than 90%. Singapore recorded a 100% net enrollment rate while in Brunei Darussalam and Viet Nam, only 2.0% of children of primary school age are not enrolled in school.

Figure 2.2. Net enrolment rate in primary education (%) by ASEAN Member States, 2006-2017

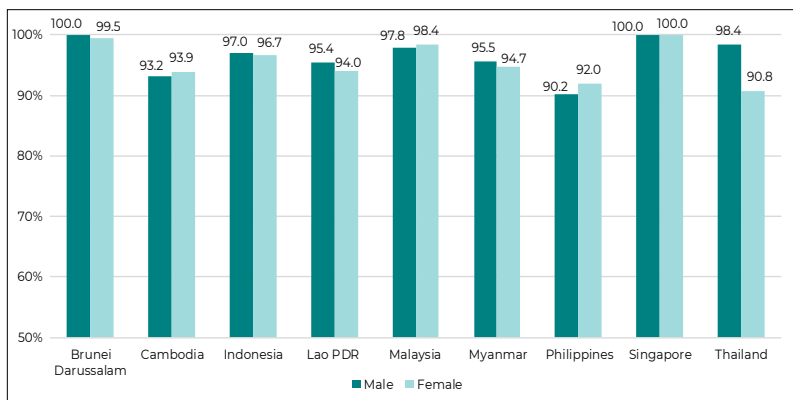


Note: *The latest available data for Cambodia is 2016; for Brunei Darussalam, Lao PDR and Thailand is 2015

Source: ASEAN Secretariat, ASEANstats database

In term of primary school enrolment by gender, almost all AMS have achieved gender equality, with the difference between net enrollment of male and female at 2.0 percentage point or less (Figure 2.3).

Figure 2.3. Net enrolment rate in primary education (%) by gender, 2017*



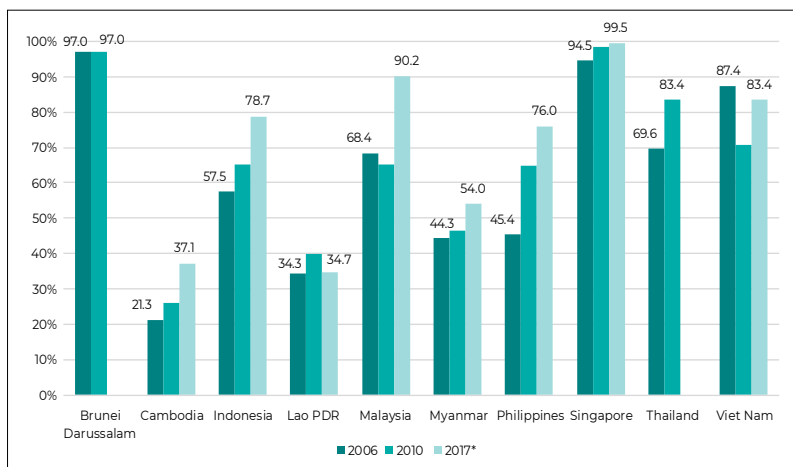
Note: *The latest available data for Cambodia is 2016; for Brunei Darussalam, Lao PDR and Thailand is 2015; Viet Nam data is not available

Source: ASEAN Secretariat, ASEANstats database

Net enrollment rate in secondary education

NER in secondary education is the ratio of children of official secondary schoolage who are enrolled in school to the population of the corresponding age. Secondary education completes the provision of basic education that begins at the primary level, and aims at laying the foundations for lifelong learning and human development, by offering more subject- or skill-oriented instruction using more specialized teachers.

Figure 2.4. Net enrollment rate in secondary education (%) by ASEAN Member States, 2006-2017

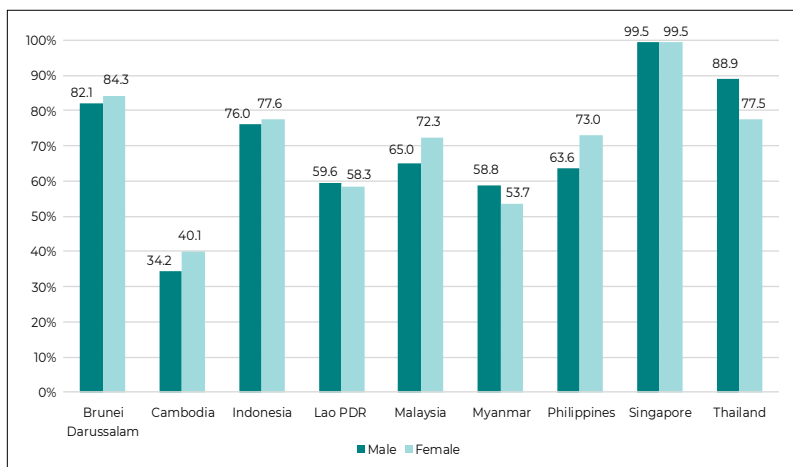


Note: *The latest available data for Cambodia is 2016; for Lao PDR is 2012; for Brunei Darussalam and Thailand is 2010

Source: ASEAN Secretariat, ASEANstats database

During the last decade, almost all AMS have experienced an increase in NER in secondary education (Figure 2.4). Significant increase of more than 30% is recorded in Cambodia, Indonesia, Malaysia and the Philippines. However, there is still room for improvement given that the NER in secondary education is still below 80% in some AMS.

Figure 2.5. Net enrolment rate in secondary education (%) by gender, 2017*



Note: *The latest available data for Cambodia is 2016; for Lao PDR is 2012; for Brunei Darussalam and Thailand is 2010; Viet Nam data is not available

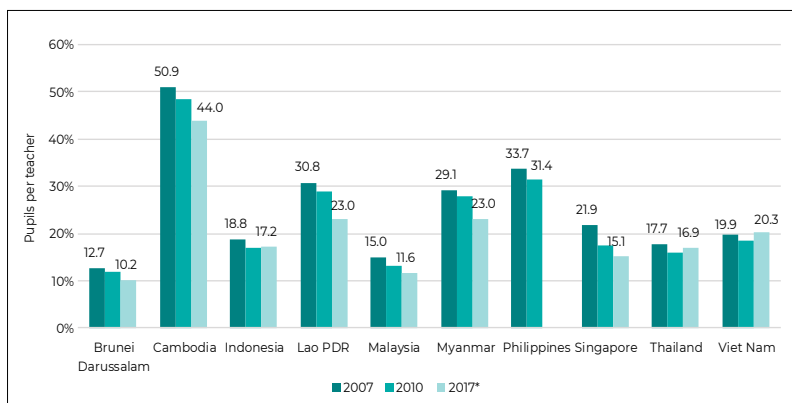
Source: ASEAN Secretariat, ASEANstats database.

Figure 2.5 shows the NER in secondary education by gender. In Cambodia, Malaysia, and the Philippines, the rate is higher for female compared to male by more than 5.0 percentage point. Similar situation was observed in Brunei Darussalam and Indonesia, although with smaller gaps (less than 2.2 percentage point). On the other hand, male NER was found to be higher in Myanmar and Thailand by 5.1 and 11.4 percentage point respectively.

Pupil-teacher ratio

Pupil-teacher ratio indicates the quality of educational provision in a country. A higher pupil-teacher ratio suggests that each teacher has to be responsible for a larger number of pupils. In other words, the lower the pupil-teacher ratio, the higher the relative access of pupils to teachers, which enables the teachers to pay more attention to individual students. In the long run, this may result in better performance of the pupils.

Figure 2.6. Pupil-teacher ratio in primary education by ASEAN Member States, 2007-2017

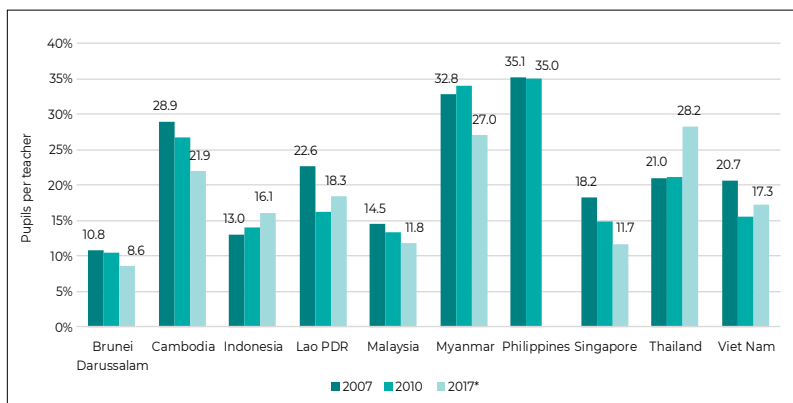


Note: *The latest available data for Brunei Darussalam and Lao PDR is 2016; for Thailand is 2015; for Philippines is 2009

Source: ASEAN Secretariat, ASEANstats database

Figure 2.6 shows that the pupil-teacher ratio in primary education has improved across AMS. The lowest ratios were observed in Brunei Darussalam at 10.2, Malaysia at 11.6, and Singapore at 15.1. However, the ratio remains relatively high at more than 20 pupils per teacher in Cambodia, Lao PDR, Myanmar, the Philippines, and Viet Nam.

Figure 2.7. Pupil-teacher ratio in secondary education by ASEAN Member States, 2007-2017



Note: *The latest available data for Brunei Darussalam and Lao PDR is 2016; for Thailand is 2015; for Philippines is 2009

Source: ASEAN Secretariat, ASEANstats database

Similar improvement was observed in the pupil-teacher ratio in secondary education across AMS (Figure 2.7), with the lowest ratio recorded in Brunei Darussalam (8.6), followed by Singapore (11.7), and Malaysia (11.8). Meanwhile, in Cambodia, Myanmar, and Thailand, the pupil-teacher ratio remains relatively high at more than 20.

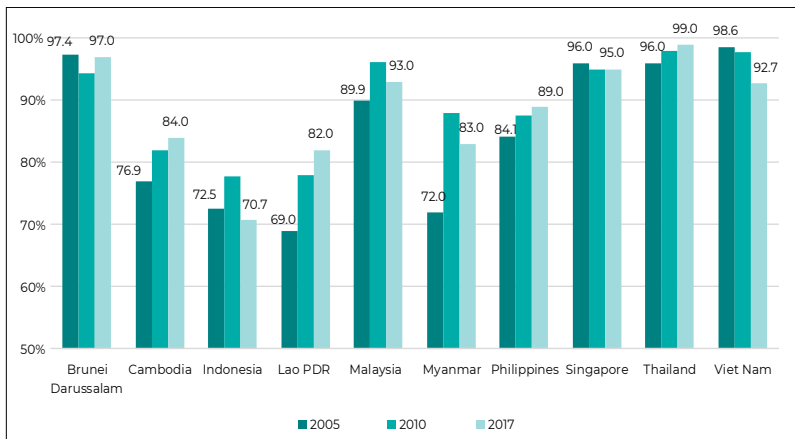
Introduction

This chapter focuses on indicators related to public health, namely the coverage of immunisation among one-year old children, access to safe drinking water, and improved sanitation.

Coverage of immunisation among one-year old children

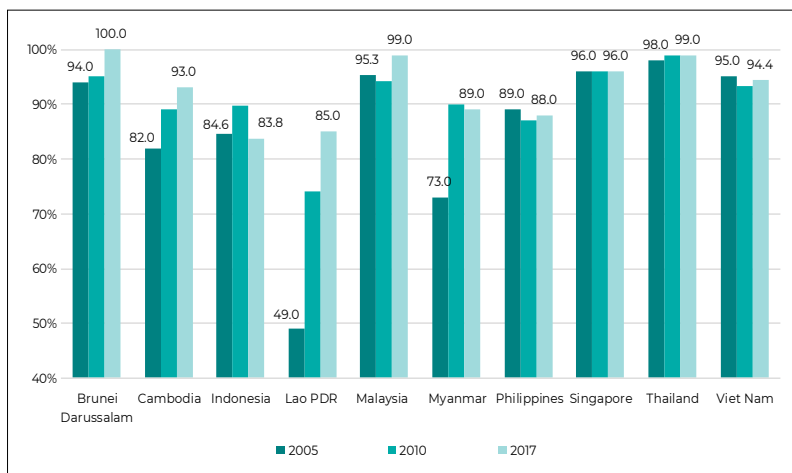
Immunisation is one of the most cost-effective public health interventions to reduce child mortality and morbidity associated with infectious diseases. The coverage of immunisation among one-year old children is defined as the share of one-year old children who is immunised to the total children population aged one year. The coverage of immunisation against measles and diphtheria, pertussis, and tetanus (DPT) between 2005 and 2017 in the AMS are shown in Figure 3.1 and 3.2 respectively.

Figure 3.1. Coverage of immunisation against measles among one year old children (%) by ASEAN Member States, 2005-2017



Source: ASEAN Secretariat, ASEANstats database

Figure 3.2. Coverage of immunisation against DPT among one year old children (%) by ASEAN Member States, 2005-2017



Source: ASEAN Secretariat, ASEANstats database

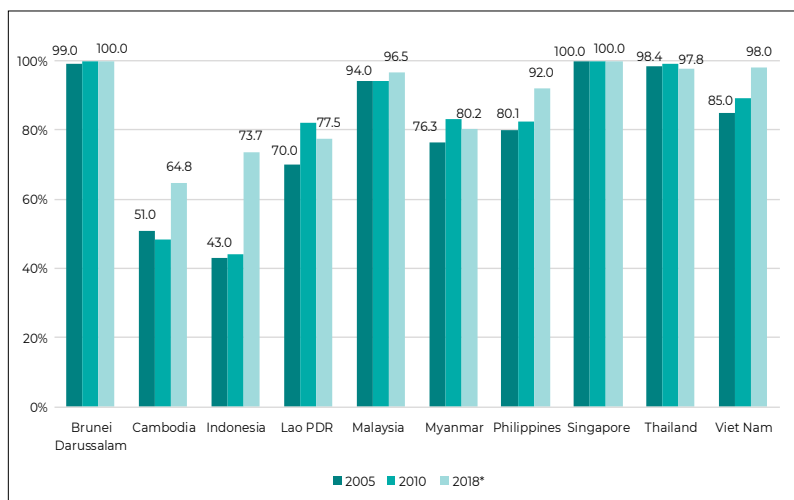
Measles immunisation has consistently covered well over 90% of total children aged one year in Brunei Darussalam, Malaysia, Singapore, Thailand, and Viet Nam during period covered. Significant progress was recorded in other AMS from 76.9% in 2005 to 84.0% in 2017 in Cambodia, from 69.0% to 82.0% in Lao PDR, and from 72.0% to 83.0% in Myanmar. Similar trends are observed for DPT immunisation, with the highest coverage recorded in 2017 in Brunei Darussalam (100%), Malaysia (99.0%), Singapore (96.0%), Thailand (99.0%) and Viet Nam (94.4%). While the coverage for Indonesia and the Philippines remained at above 80%, remarkable progress was recorded in Lao PDR (from 49.0% in 2005 to 85.0% in 2017), Myanmar (73.0% to 89.0%), and Cambodia (82.0% to 93.0%).

Access to safe drinking water and improved sanitation

Access to drinking water and improved sanitation are essential factors in ensuring public health. Figure 3.3 shows that the whole population of Brunei Darussalam and Singapore have access to safe drinking water in 2018 while in Viet Nam, Thailand, Malaysia, and the Philippines,

the coverage was well above 90% at 98.0%, 97.8% 96.5%, and 92.0%, respectively. Meanwhile, in other AMS though the rate remains relatively low, significant improvement was observed particularly in Cambodia from 51.0% in 2005 to 64.8% in 2017 and Indonesia from 43.0% in 2005 to 73.7% in 2017.

Figure 3.3. Population with access to safe drinking water (%) by ASEAN Member States, 2005-2018

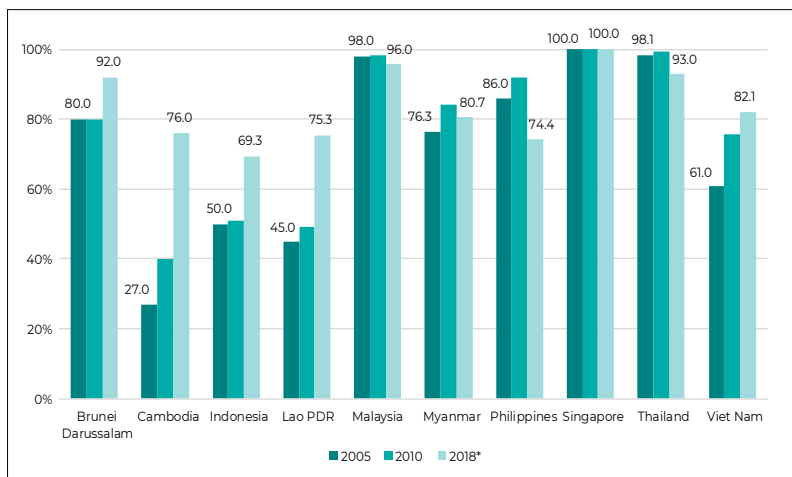


Note: *The latest available data for Cambodia, Lao PDR, Malaysia, Myanmar, Philippines, Thailand and Viet Nam is 2017

Source: ASEAN Secretariat, ASEANstats database

With regard to access to improved sanitation, full population coverage is recorded in Singapore while the coverage is above 90% in Malaysia, Thailand, and Brunei Darussalam. Significant improvement is observed in Cambodia, Indonesia, Lao PDR, and Viet Nam during the period of 2005-2018.

Figure 3.4. Population with access to improved sanitation (%) by ASEAN Member States, 2005-2018



Note: *The latest available data for Brunei Darussalam and Lao PDR is 2016; for Thailand is 2015; for Philippines is 2009

Source: ASEAN Secretariat, ASEANstats database

The state of human development in ASEAN during the last few decades has rapidly improved, as indicated by the decline in poverty incidence and income inequality as well as improvement in human development index.

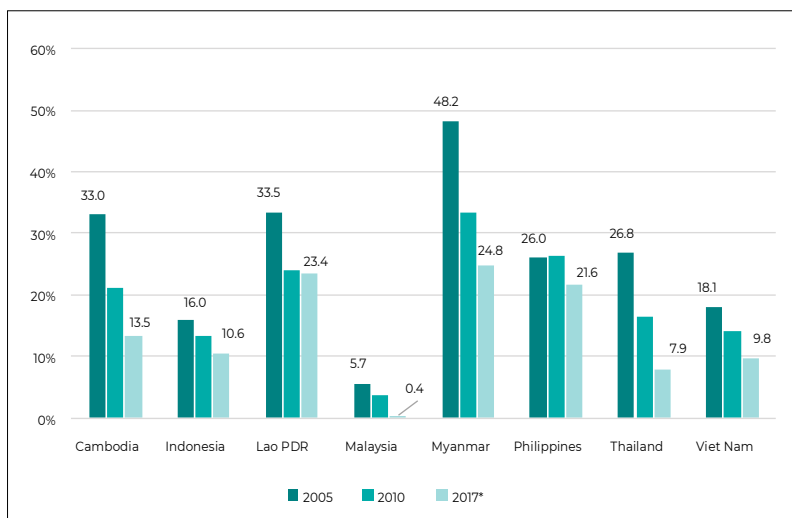
Poverty incidence

Available data on the shares of population living below national poverty lines indicate that all AMS⁶ experienced a decline in poverty incidence between 2005 and 2017. Figure 4.1 shows that a large reduction in poverty level was recorded by Myanmar from 48.2% in 2005 to 24.8% in 2017, or a decline of 23.4 percentage points. Significant poverty reduction was also experienced during the same period by Cambodia and Thailand, with a decline of 19.5 and 18.9 percentage points to reach 13.5% and 7.9%, respectively, in 2017.

Lao PDR and Viet Nam also demonstrated good progress, with poverty incidence rate declining from 33.5% and 18.1% in 2005 to 23.4% and 9.8%, respectively, in 2017.

⁶ Data on poverty is not applicable for Brunei Darussalam and Singapore.

Figure 4.1. Population living below the national poverty lines (%) by ASEAN Member States, 2005-2017



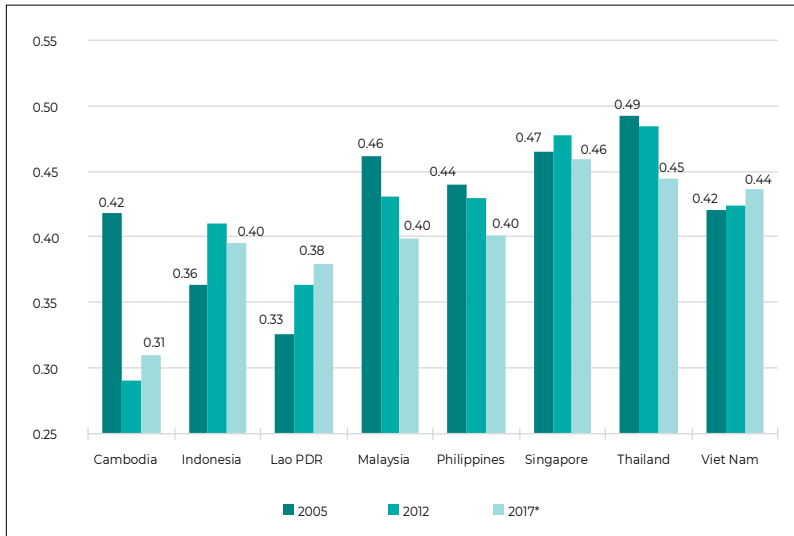
Note: *The latest data available for the Philippines is 2016

Source: ASEAN Secretariat

Income inequality

Income inequality in the region, as measured by *Gini Ratio*, ranged from the lowest at 0.31 in Cambodia and the highest at 0.46 in Malaysia and Singapore in 2017 (Figure 4.2). Between 2005 and 2017, increase in *Gini Ratio* was recorded in Indonesia, Lao PDR, and Viet Nam, indicating a rise in income inequality. On the other hand, decline in *Gini Ratio* was observed in Cambodia, Malaysia, Philippines, Singapore, and Thailand.

Figure 4.2. Gini ratio by ASEAN Member States, 2005-2017



Note: *The latest data available for Cambodia, Malaysia, Singapore and Viet Nam is 2016; for Lao PDR, the Philippines and Thailand is 2015; data for Brunei Darussalam and Myanmar is not available

Source: ASEAN Secretariat, ASEANstats database.

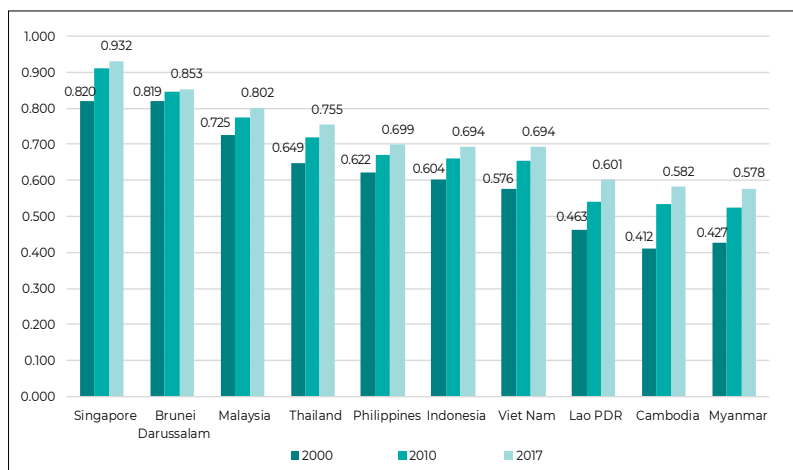
Human development index

Human Development Index (HDI) is another measure of the wellbeing of a country's population, focusing on three basic dimensions of human development: ability to lead a long and healthy life as measured by life expectancy at birth; ability to acquire knowledge as measured by mean years of schooling and expected years of schooling; and ability to achieve a decent standard of living as measured by gross national income per capita (UNDP 2018).

Figure 4.3 shows that three AMS namely Singapore, Brunei Darussalam, and Malaysia, are categorized in the very high category of HDI, while one AMS- Thailand -was in the high category. The remaining six AMS were in the medium HDI category⁷.

Increase in HDI value was recorded in all 10 AMS during the last 17 years, albeit at different rate. Cambodia, Myanmar, Lao PDR, and Viet Nam experienced the fastest growth, with HDI values increasing by 17.0%, 15.1%, 13.8%, and 11.8%, respectively, between 2000 and 2017. This was followed by Singapore and Thailand, with an 11.2% and 10.6% increase. HDI values of Indonesia, Philippines, and Malaysia grew by around 8%; whereas that of Brunei Darussalam increased by 3.4% during the same period.

Figure 4.3. Human development index by ASEAN Member States, 2000-2017



Source: UNDP, a series of Human Development Reports.

⁷ HDI of less than 0.550 for low human development; 0.550–0.699 for medium human development; 0.700–0.799 for high human development and 0.800 or greater for very high human development (UNDP, Human Development Report 2018).

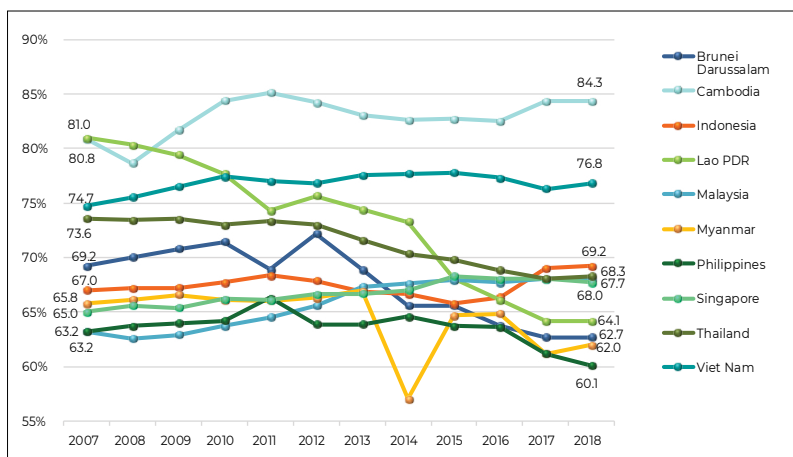
Introduction

Understanding trends in the labour market is important for designing effective and relevant employment policies. As population in the region continues to grow, notably the working-age segment, the economy should keep up by providing sufficient employment opportunities for the growing labour force. This section describes trends in the labour force participation rates, unemployment rates, and employment by industries or economic sectors in ASEAN.

Labour force participation rate

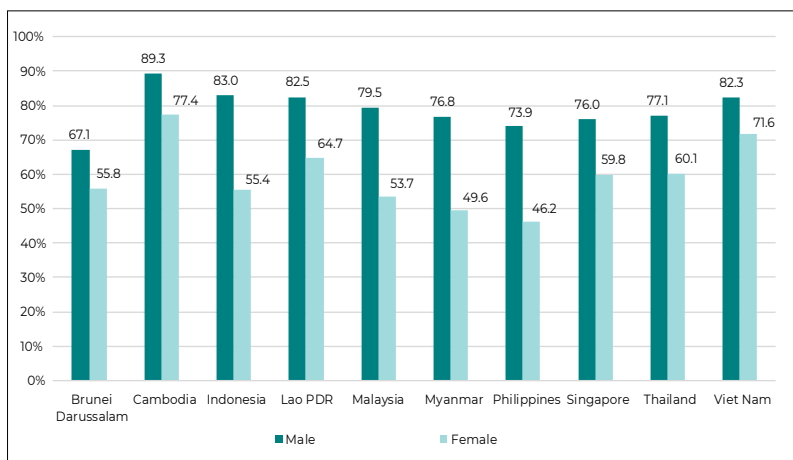
The labour force participation rate (LFPR) measures the proportion of a country's working-age population that engages actively in the labour market, either by working or looking for work. It indicates the size of the supply of labour available to engage in the production of goods and services, relative to the population at working age (ILO 2016). Figure 5.1 presents the trends of LFPR in AMS between 2007 and 2018. LFPRs are found to be relatively stable during the period, with the exception of Lao PDR where LFPR decline from 81.0% in 2007 to 62.2% in 2018. In 2018, Cambodia has the highest LFPR at 84.4%, followed by Viet Nam 76.8%. As for the other AMS, the LFPR ranging from 60.1% to 69.2% in 2018.

Figure 5.1. Labour force participation rates (%) by ASEAN Member States, 2007-2018



Source: ASEAN Secretariat, ASEANstats database

Figure 5.2. Labour force participation rates by gender (%) by ASEAN Member States, 2018



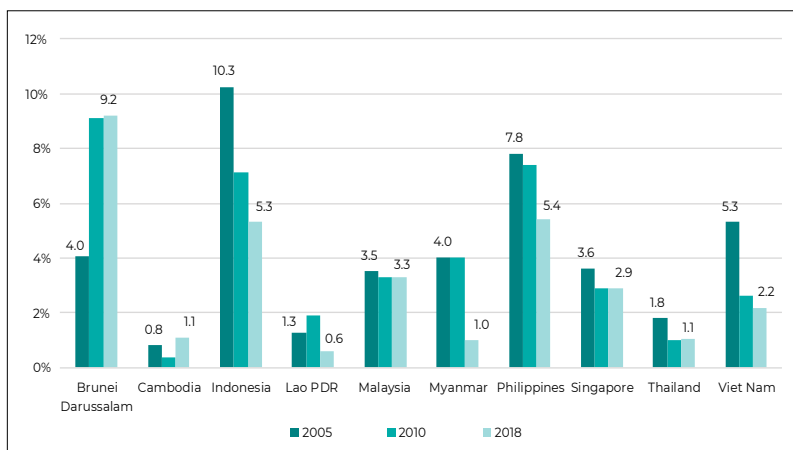
Source: ASEAN Secretariat, ASEANstats database.

Gender comparison of LFPRs (Figure 5.2) indicates that in all 10 AMS, male participation rate is higher compared to female. The gender disparity in LFPR was the highest in the Philippines at 73.9% for males as compared to 46.2% for females in 2018, followed by Indonesia (83.0% vs. 55.4%), Myanmar (76.8% vs. 49.6%), and Malaysia (79.5% vs. 53.7%).

Unemployment rate

Unemployment rate measures the under utilisation of labour supply, reflecting inability of the working-age population who are actively seeking work to find employment. While the unemployment rates in all AMS are found to be relatively low over the observed period of 2005-2017 (Figure 5.3), the rates tend to fluctuate in all AMS following fluctuations in the economic environment. In 2018, the rate was lowest in Lao PDR, Myanmar, Thailand, and Cambodia at below 2%, followed by Viet Nam (2.2%), Singapore (2.9%), and Malaysia (3.3%). At 9.2%, Brunei Darussalam recorded the highest unemployment rate, followed by the Philippines (5.4%), and Indonesia (5.3%).

Figure 5.3. Unemployment rates (%) by ASEAN Member States, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

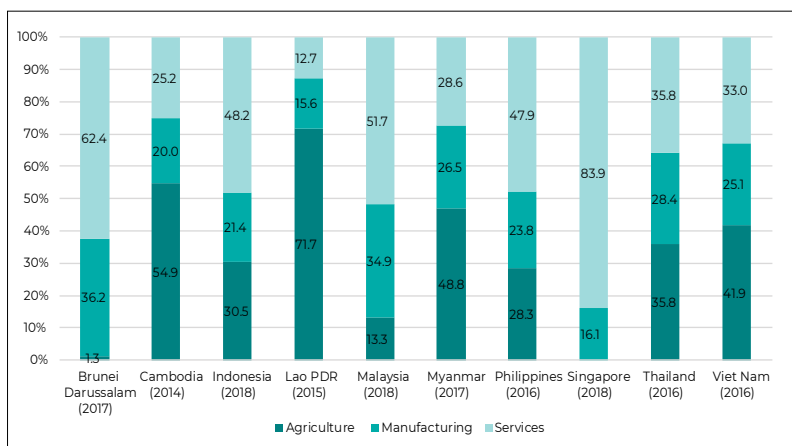
Employment by economic sectors

Figure 5.4 shows the employment structure by main economic sectors in the 10 AMS, based on the most recent available data. Agricultural sector is a significant contributor to employment in Lao PDR and Cambodia at 71.7% and 54.9%, respectively, followed by Myanmar (48.8%) and Viet Nam (41.9%). Agriculture remains a key contributor to employment in other AMS, notably in Thailand (35.8%), Indonesia (30.5%), and the Philippines (28.3%) despite the shift to manufacture and services sectors.

On the other hand, manufacturing sector, which also includes construction and other sectors, contributed 36.2% of total employment in Brunei Darussalam, 34.9% in Malaysia, and 28.4% in Thailand. The share of employment in this sector was lowest in Lao PDR at 15.6% in 2015.

Finally, Singapore has highest share of employment in the services sector at 83.9% in 2018, followed by Brunei Darussalam (62.4%), Malaysia (51.7%), Indonesia (48.2%), and the Philippines (47.9%). The contribution of the tertiary sector to employment remains relatively low in Lao PDR at 12.7%.

Figure 5.4. Shares of employment by main economic sectors (%) by ASEAN Member States, various years

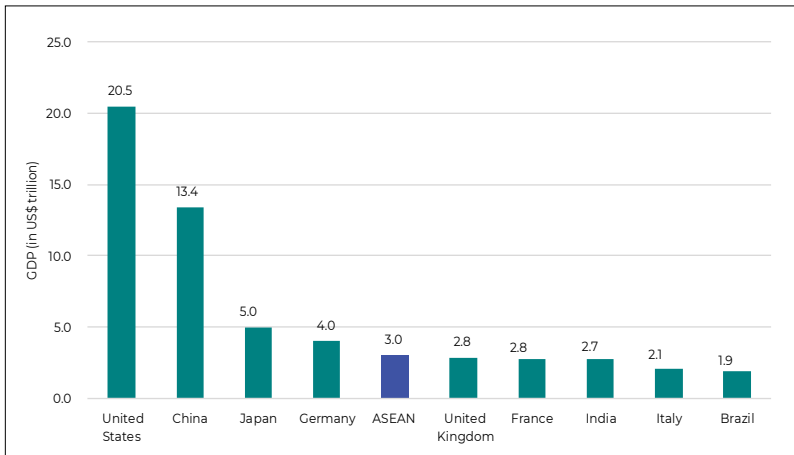


Source: ASEAN Secretariat, ASEANstats database.

Gross Domestic Product

Gross Domestic Product (GDP) is the value of all the output (or production) carried out by all firms, non-profit institutions, government bodies and households in a given economy during a given period. Total combined GDP of ten AMS was valued at US\$3.0 trillion in 2018, positioning ASEAN as the fifth largest economy in the world (Figure 6.1). Only the United States (US\$20.5 trillion), China (US\$13.4 trillion), Japan (US\$5.0 trillion), and Germany (US\$4.0 trillion) had larger GDP than the region.

Figure 6.1. Top ten largest economies in the world (US\$ trillion), 2018

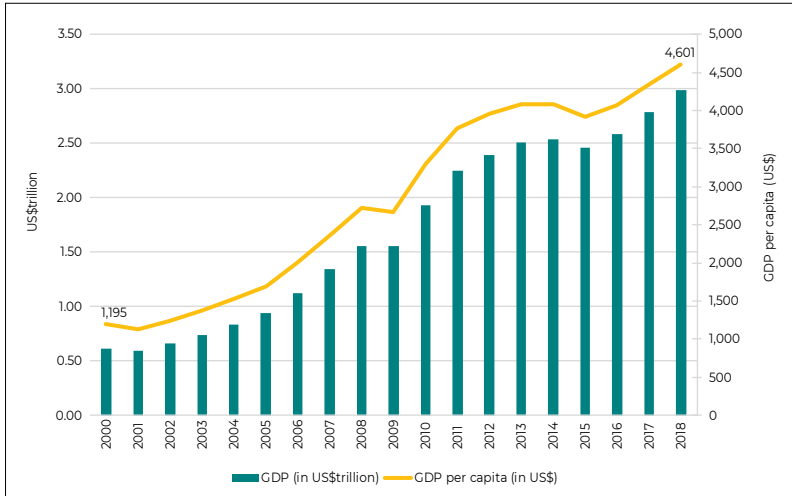


Source: ASEAN Secretariat, ASEANstats database

ASEAN's GDP had been on a positive trend through the period of 2000-2018, notwithstanding the global economic crisis in 2008-2009 (Figure 6.2). The region's total GDP in 2018 was almost double that of a decade ago (USD 1.6 trillion in 2008) and almost fivefold the value in 2000 (US\$0.6

trillion). Similar trend was also observed for the ASEAN GDP per capita which reached US\$4,601.3 in 2018, compare to 2010 at US\$3,299.3, and almost four times its value in 2000 (US\$1,195.0).

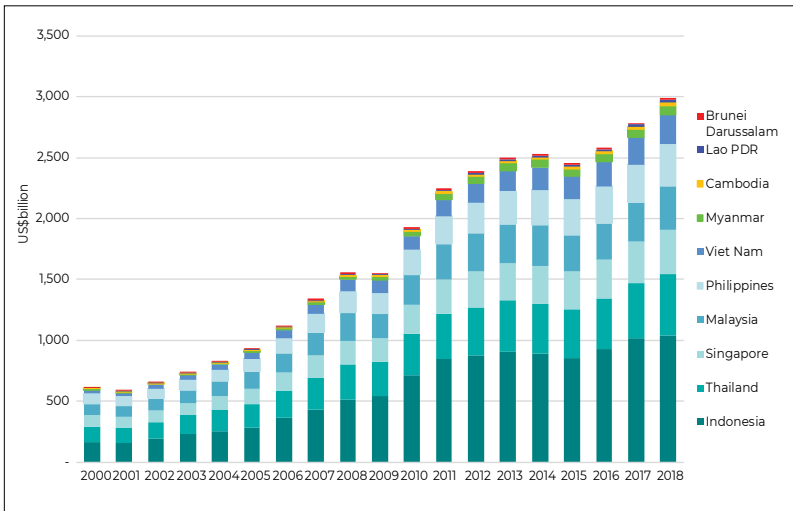
Figure 6.2. ASEAN GDP (US\$ trillion) and GDP per capita (US\$), 2000-2018



Source: ASEAN Secretariat, ASEANstats database

Figure 6.3 indicates the diversity in economic size among ASEAN member states with Indonesia as the largest economy in ASEAN, accounting for 34.9% of the region's GDP in 2018, followed by Thailand (16.9%), Singapore (12.2%), and Malaysia (12.0%).

Figure 6.3. Total GDP (US\$ billion) by ASEAN Member States, 2000-2018

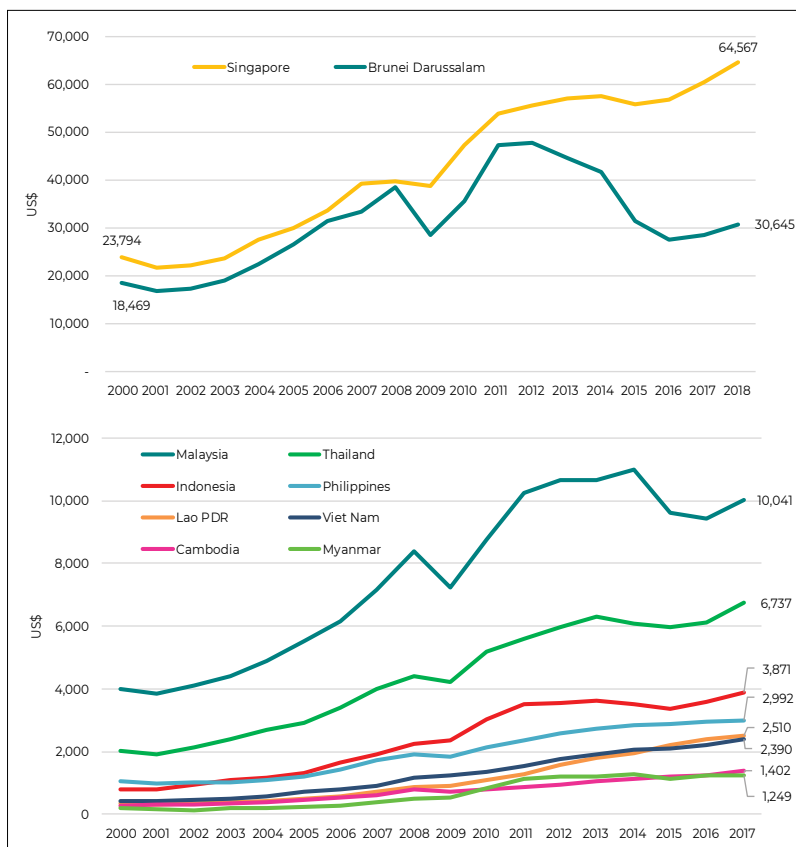


Source: ASEAN Secretariat, ASEANstats database

As for GDP per capita (GDP of an economy divided by its total population), which is a proxy of living standard, Figure 6.4 shows that Singapore and Brunei Darussalam recorded the highest value in 2018 at US\$64,567.3 and US\$30,645.6 respectively. The figures were about 14.0 times and 6.7 times higher than ASEAN's average GDP per capita of US\$4,601.3.

GDP per capita increased in all AMS from 2000-2018. The most significant improvement was observed in Lao PDR where GDP per capita increased by 691.1% over this period, followed by Myanmar (606.2%) and Viet Nam (531.1%).

Figure 6.4. GDP per capita (US\$) by ASEAN Member States, 2000-2018



Source: ASEAN Secretariat, ASEANstats database

Real GDP growth

Real GDP growth is a year-to-year comparison of the value of all goods and services produced in an economy expressed in base-year prices. During the period of 2000-2018, ASEAN's economy grew steadily with an average annual growth of 5.3% (Table 1). Among AMS, Myanmar, Cambodia, and Lao PDR recorded the highest GDP growth with average annual growth of 9.8%, 7.7%, and 7.1%, respectively.

Table 1. Real GDP growth rate, 2000-2018.

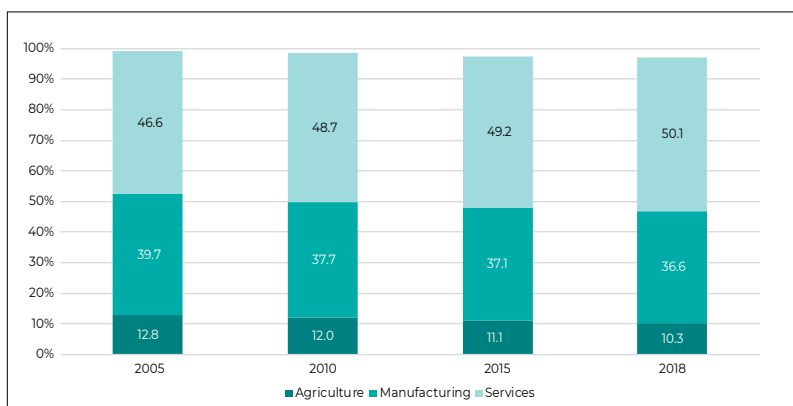
	GDP growth rate (%)					Annual average 2000-2018
	2000	2005	2010	2015	2018	
Brunei Darussalam	2.9	0.4	2.6	-0.4	0.1	0.8
Cambodia	8.4	13.6	6.0	7.0	7.5	7.7
Indonesia	5.4	5.7	6.2	4.9	5.2	5.3
Lao PDR	5.8	7.3	8.1	7.3	6.3	7.1
Malaysia	8.9	5.3	7.4	5.0	4.7	5.1
Myanmar	13.7	13.6	9.6	7.0	6.8	9.8
Philippines	4.4	4.8	7.6	6.1	6.2	5.4
Singapore	8.9	7.5	15.2	2.2	3.1	5.2
Thailand	4.5	4.2	7.5	3.1	4.1	4.1
Viet Nam	6.8	7.5	6.4	6.7	7.1	6.6
ASEAN	6.0	5.8	7.5	4.8	5.2	5.3

Source: ASEAN Secretariat, ASEANstats database

GDP by main economic sectors

The decomposition of GDP by its three main sectors namely agriculture, manufacturing and services, indicates the economic structure in the country and the contribution of each sector to the economy

Figure 6.5. Shares of main economic sectors to total ASEAN GDP (%), 2005-2018

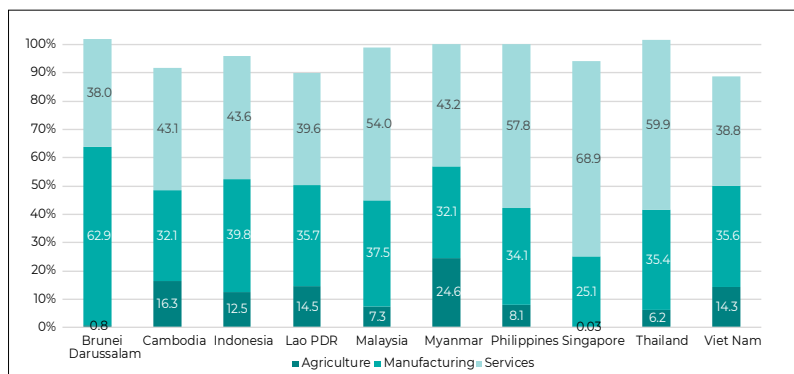


Source: ASEAN Secretariat, ASEANstats database

During the period of 2005-2018, services, which covers trade, government activities, communications, transportations, finance and other economic activities not producing goods, was the leading sector in ASEAN's economy (Figure 6.5). The share of this sector to the region GDP increased from 46.6% in 2005 to 50.9% in 2018. In contrary, the shares of the other two sectors decreased over the same period. Manufacturing, which includes manufacturing, electricity, gas and water supply, construction as well as mining and quarrying, contributed 36.6% of total GDP in 2018, a decrease from 39.7% in 2005. The share of agriculture, covering farming, fishing, and forestry, also decreased to 10.6% in 2018 (from 12.8% in 2005).

Figure 6.6 shows that economic structures differ across AMS in 2018. Services was the leading sector in all AMS, except Brunei Darussalam. The services sector was found to be the largest in Singapore, reaching 69.9% of the country's total GDP, followed by Thailand (59.9%), the Philippines (57.8%), and Malaysia (54.0%). Meanwhile, manufacturing was the leading sector in Brunei Darussalam, contributing 62.9% to total GDP of the country. Agriculture remained an important sector for Myanmar (24.6%) followed by Cambodia (16.3%), Lao PDR (14.5%), Viet Nam (14.3%), and Indonesia (12.5%).

Figure 6.6. Shares of main economic sectors to total GDP (%) by ASEAN Member States, 2018



Note: The sum of these three sectors may not add up to 100% due to difference in the treatment of statistical discrepancy among AMS

Source: ASEAN Secretariat, ASEANstats database

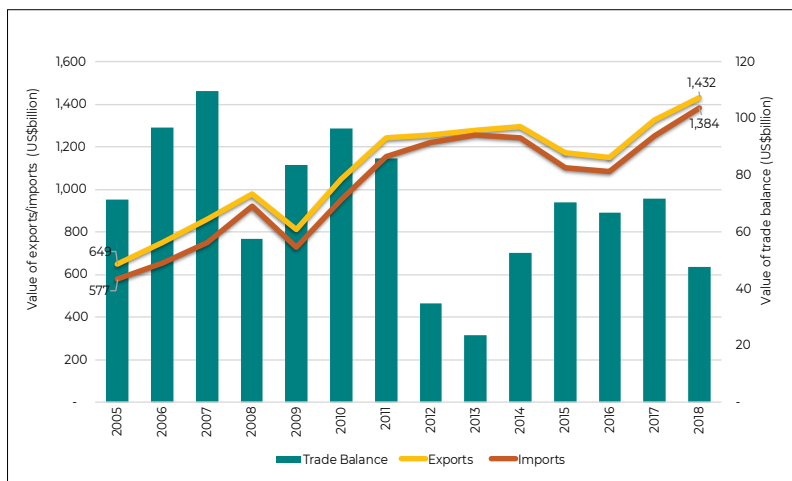
Introduction

International trade and foreign direct investment (FDI) have increasingly become key underpinning factors in the region's economic development. ASEAN total values of merchandise trade and trade in services have increased significantly over the past few years to reach more than US\$2.8 trillion and US\$778.6 billion, respectively, in 2018, while total FDI inflows to the region amounted to US\$154.7 billion in the same year.

International merchandise trade

Within a period of only 13 years, ASEAN total merchandise trade has multiplied by 2.3 times, reaching over US\$2.8 trillion in 2018 (Figure 7.1). Both exports and imports of goods steadily increased during the period, except in 2009 and 2015-2016. Exports values tend to be higher than imports resulting in a positive trade balance during the period.

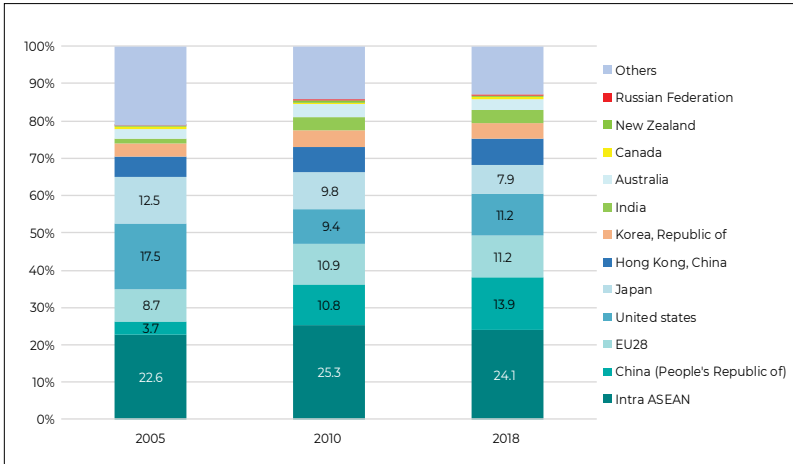
Figure 7.1. Value of exports and imports of goods and trade balance (US\$ billion), ASEAN total, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

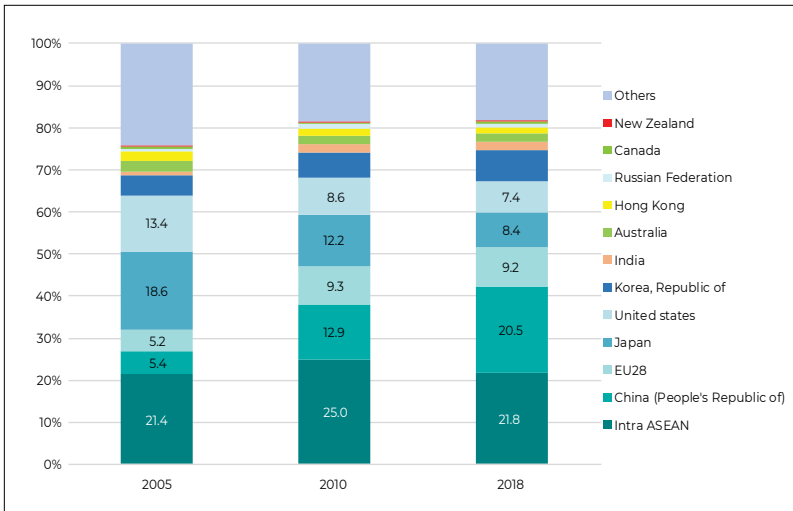
Intra-ASEAN trade has continuously accounted for the largest share of ASEAN total trade. In 2018, intra-ASEAN stands at 23.0% of total trade in the region, with intra-ASEAN market constituting 24.1% and 21.8% of ASEAN total merchandise exports and imports, respectively (Figure 7.1). China (17.2%), EU-28 (10.2%), and USA (9.3%) are ASEAN's top three trading partners in 2018. The largest external markets for ASEAN exports in 2018 were China (13.9%), EU-28 (11.2%), USA (11.2%), and Japan (7.9%). As for imports, China is the region's largest external source of imports with a share of 20.5%, followed by EU-28 (9.2%), Japan (8.4%), and USA (7.4%).

Figure 7.2. Shares of merchandise exports values (%) by trading partners, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

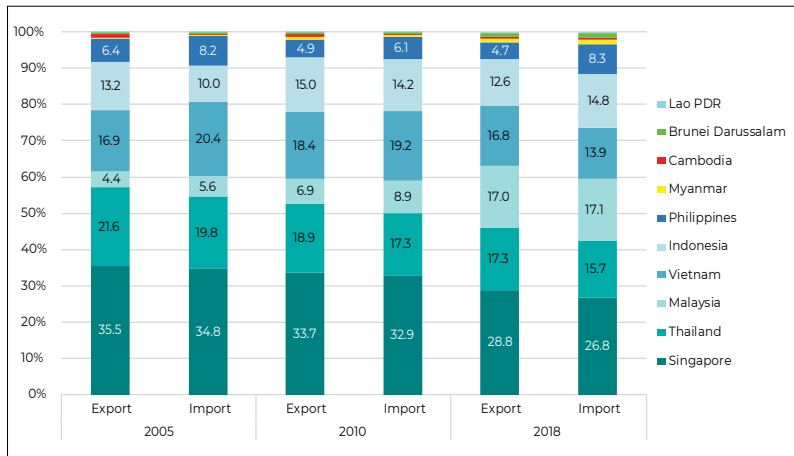
Figure 7.3. Shares of merchandise imports values (%) by trading partners, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.4 shows that, as a trade hub, Singapore was the largest exporter in the region in 2018, with a share of 28.8% of the ASEAN total exports, followed by Malaysia (17.3%), Viet Nam (17.0%), and Thailand (16.8%). As for imports, similarly, the largest importer is Singapore with a share of 26.8% of ASEAN total imports, followed by Viet Nam (17.1%), Malaysia (15.7%), and Indonesia (14.8%). Exports and imports shares in ASEAN's total significantly increased for Viet Nam from 4.4% and 5.6% in 2005 to 17.0% and 17.1% in 2018, respectively. Myanmar, Cambodia, and Lao PDR also observed increases over the same period.

Figure 7.4. Shares of exports and imports of goods (%) by ASEAN Member States, 2005-2018

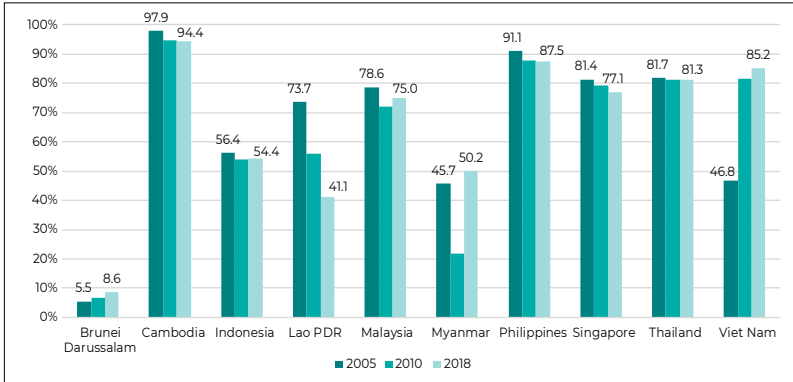


Source: ASEAN Secretariat, ASEANstats database.

Manufacturing sector in ASEAN's merchandise trade

Manufacturing products constitute a major share of both total exports and imports in most AMS. Figure 7.5 shows that the largest share of manufacturing products to total exports in 2018 was recorded in Cambodia (94.4%), followed by the Philippines (87.5%), Viet Nam (85.2%), and Thailand (81.3%).

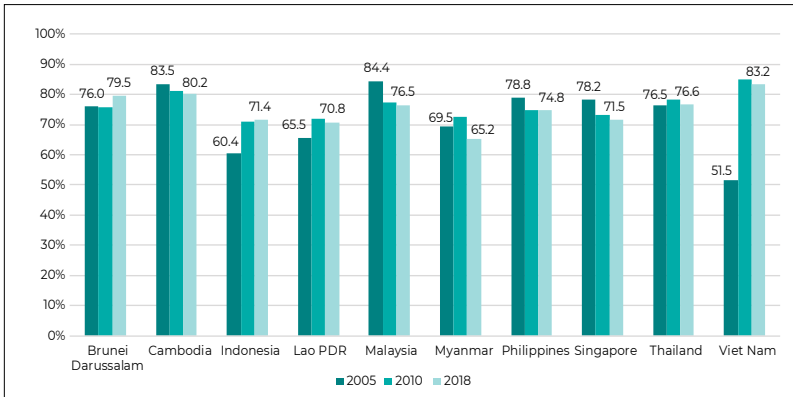
Figure 7.5. Shares of manufacturing products to total exports (%) by ASEAN Member States, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

Meanwhile, Figure 7.6 shows that the largest manufacturing shares in imports of goods in 2018 were recorded in Viet Nam (83.2%) and Cambodia (80.2%), followed by Thailand (76.6%) and Malaysia (76.5%).

Figure 7.6. Shares of manufacturing products to total imports (%) by ASEAN Member States, 2005-2018

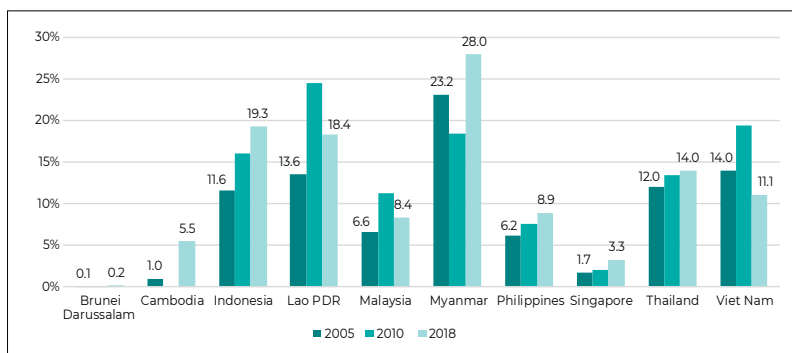


Source: ASEAN Secretariat, ASEANstats database.

Agricultural sector in ASEAN's merchandise trade

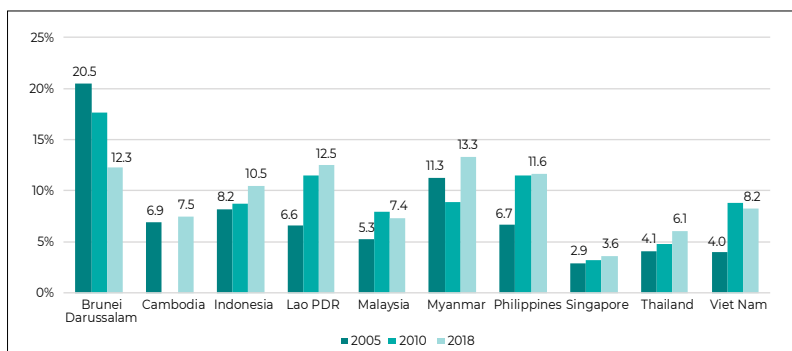
Agriculture remain a relatively important trade sector in some AMS. Figure 7.7 shows that Myanmar has the largest share of agricultural products in total exports at 28.0% in 2018, followed by Indonesia (19.3%) and Lao PDR (18.4%). As for imports (Figure 7.8), agricultural products shares in total imports in 2018 were highest in Myanmar (13.3%), followed by Lao PDR (12.5%), Brunei Darussalam (12.3%), and the Philippines (11.6%) .

Figure 7.7. Shares of agricultural products to total exports (%) by ASEAN Member States, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.8. Shares of agricultural products to total imports (%), ASEAN Member States, 2005-2018

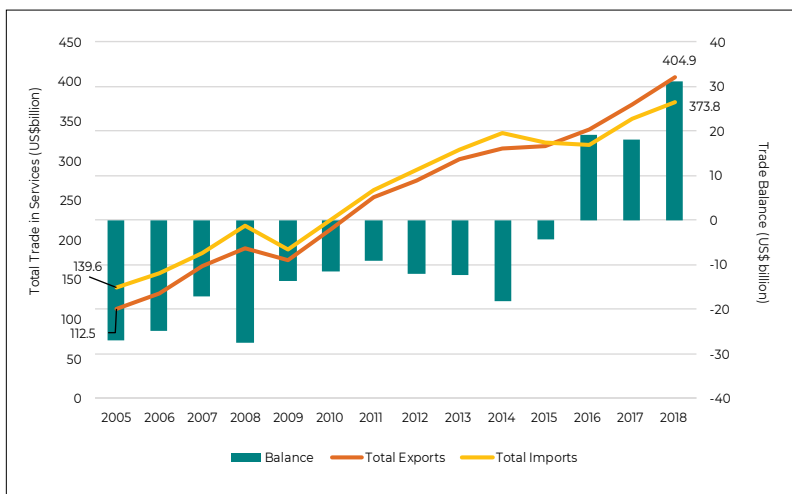


Source: ASEAN Secretariat, ASEANstats database.

International trade in services

ASEAN total trade in services has increased significantly from US\$252.2 billion in 2005 to US\$778.6 billion in 2018. Total ASEAN exports of services increased nearly fourfold from US\$112.5 billion in 2005 to US\$404.9 billion in 2018 while total ASEAN imports of services increased nearly threefold from US\$139.6 billion to US\$373.8 billion (Figure 7.9). In terms of trade balance, after experiencing a continuous trade deficit since 2005, ASEAN recorded a positive balance on trade in services starting in 2015, which reached \$31.1 billion in 2018.

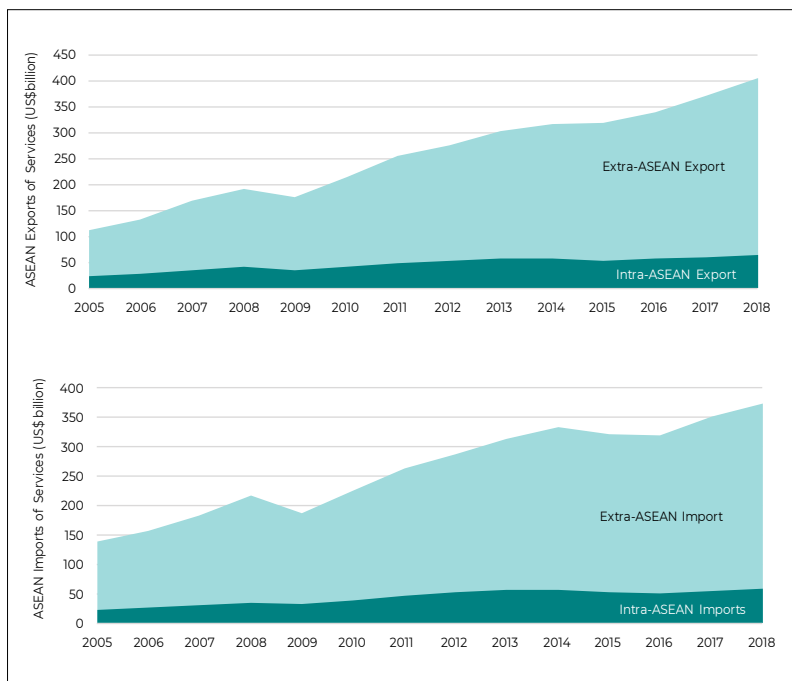
Figure 7.9. Values of exports and imports of services and trade balance (US\$billion), ASEAN total, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

The share of intra-ASEAN in ASEAN's total trade in services decreased from 18.6% in 2005 to 15.7% in 2018. Figure 7.10 shows that during the same period, the share of intra-ASEAN exports declined from 21.1% to 15.8%, while the share of intra-ASEAN imports dropped slightly from 16.7% to 15.5%.

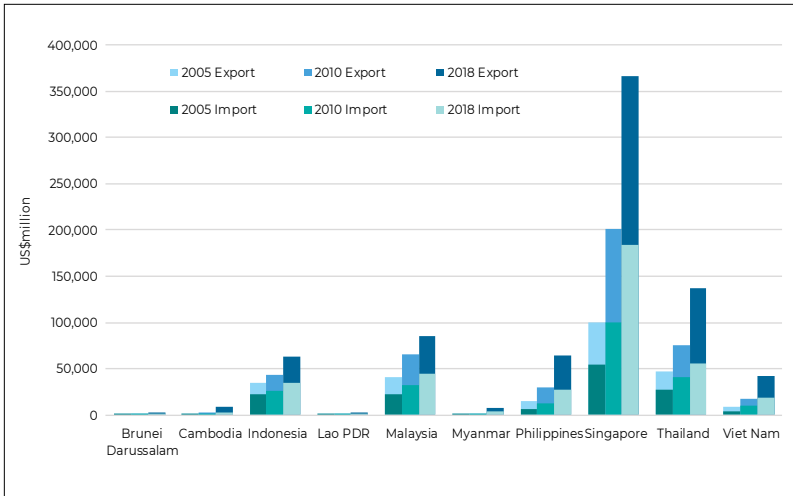
Figure 7.10. Values of intra-ASEAN exports and imports of services (US\$ billion), 2005-2018



Source: ASEAN Secretariat, ASEANstats database

Singapore accounted for the largest share of total trade in services in the region at 47.1% in 2018 (Figure 7.11), followed by Thailand (17.5%), Malaysia (10.9%), and the Philippines (8.3%). Among these top four AMS, Malaysia, Philippines, and Thailand had a positive trade balance in 2018.

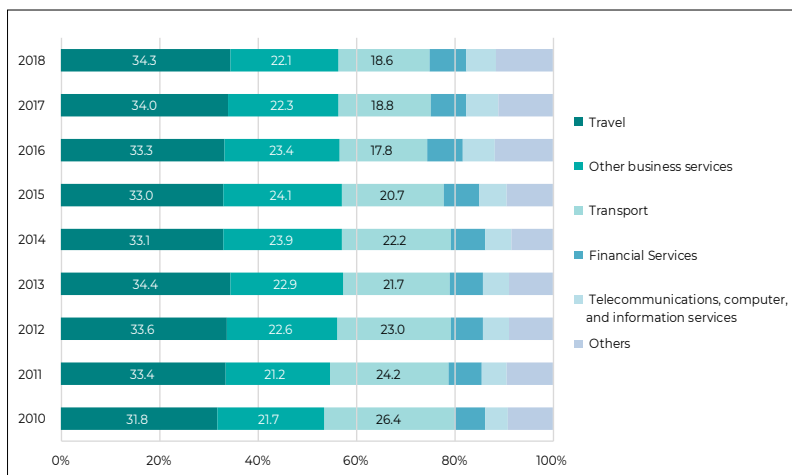
Figure 7.11. Values of exports and imports of services (US\$million) by ASEAN Member States, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

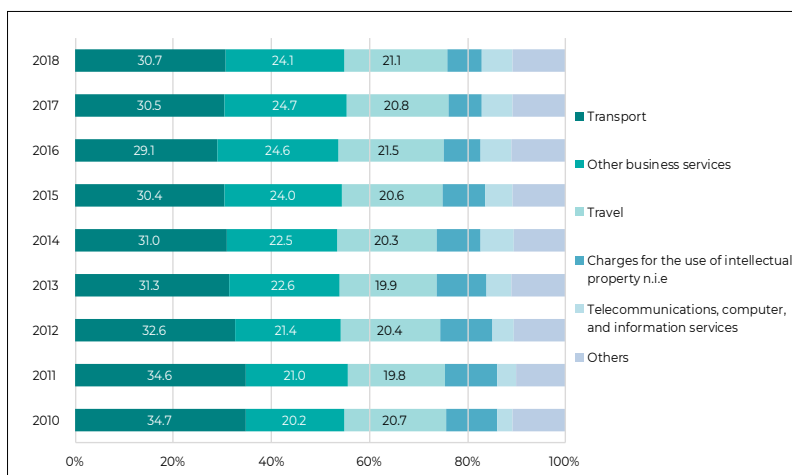
Data also shows that among services sub-sectors, travel has contributed the highest share at 34.3% of total ASEAN exports and 30.7% of total ASEAN imports in 2018 (Figure 7.12 and 7.13). The next biggest contribution came from other business services (22.1% for exports and 24.1% for imports) and transport (18.6% for exports and 21.1% for imports).

Figure 7.12. Shares of exports of services by broad headings (%), ASEAN total, 2010-2018



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.13. Shares of imports of services by broad headings (%), ASEAN total, 2010-2018



Source: ASEAN Secretariat, ASEANstats database.

Foreign Direct Investments

Foreign Direct Investment (FDI) inflows to the region have been on an increasing trend from US\$41.9 billion in 2005 to reach US\$154.7 billion in 2018 (Figure 7.14)

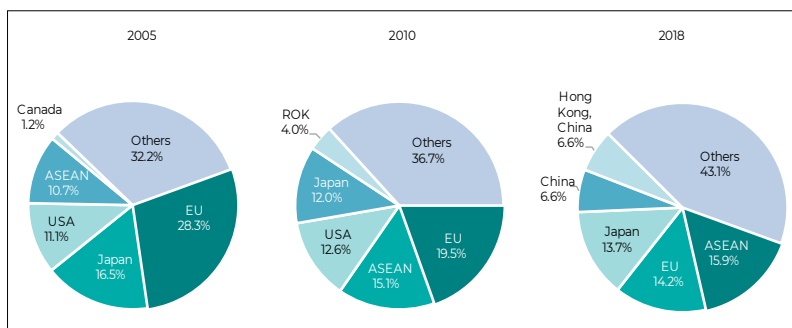
Figure 7.14. Inward flows of foreign direct investment (US\$billion), intra and extra-ASEAN, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

In 2018, 15.9% of total ASEAN FDI inflows or US\$24.5 billion originated from within the region, an increase of almost 150% the level in 2005 (Figure 7.15). The EU remains as the largest extra-ASEAN source of FDI inflows, although its share has decreased from 28.3% in 2005 to 14.2% in 2018. This is followed by Japan (13.7%), China (6.6%), and Hongkong, China (6.6%) . China, in particular, has emerged as a significant investment partner in recent years, mirroring its contribution to trade in the region.

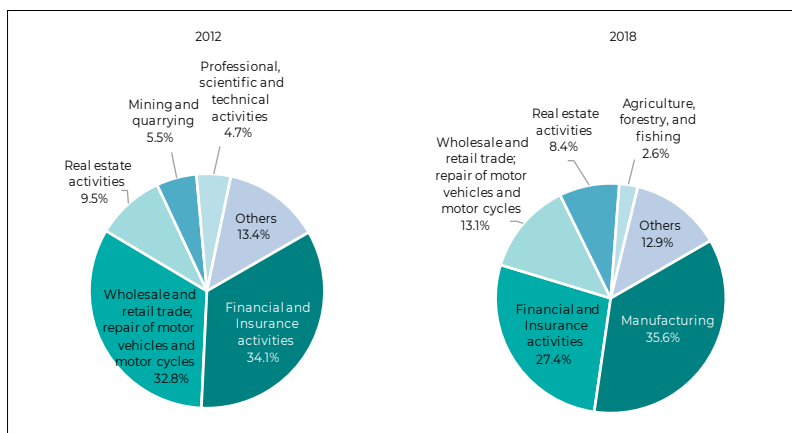
Figure 7.15. Shares of ASEAN top 5 FDI sources (% to total), 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

Figure 7.16 shows that service sector was the largest recipient of FDI inflows to the region with a share of 60.7% in 2018, followed by manufacturing sector (35.6%). Key FDI recipient activities in service sector were financial and insurance activities, with a share of 27.4% in 2018 (down from 34.1% in 2012), wholesale and retail (13.1% in 2018, down from 32.8% in 2012), and real estate activities (8.4% in 2018, down from 9.5% in 2012).

Figure 7.16. Shares of inward flows of FDI by activities (% to total), 2012 and 2018



Source: ASEAN Secretariat, ASEANstats database.

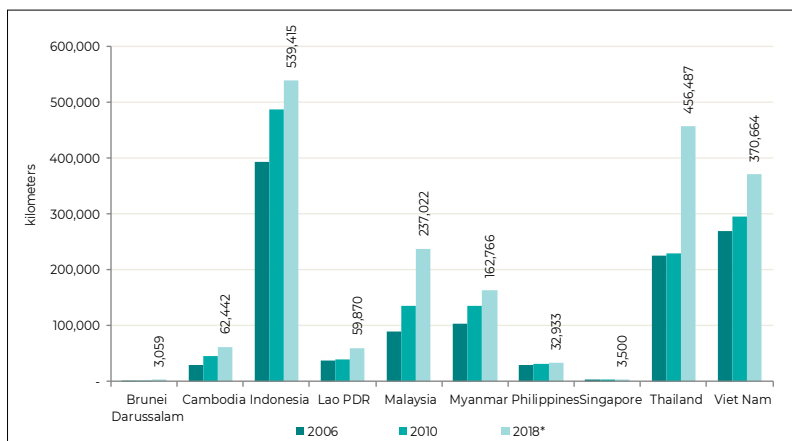
Introduction

This chapter discusses indicators on land and air transport, tourism, and communication, which indicate the level of connectivity among the Member States in the region.

Land transport

Road length and total vehicles are common measures of land connectivity. Total road length is defined as the total kilometer length of all roads in the country in a given year, including all existing road types, but excluding dedicated cycle paths. Significant improvement in total road length was observed across all AMS (Figure 8.1), reaching more than 1.9 million kilometers in 2018, 62.5% longer than 2006. Indonesia, Thailand, Viet Nam, Malaysia, and Myanmar recorded the highest total road length in the region at 539,415, 456,487, 370,664, 237,022 and 162,766 kilometers, respectively, in 2018; whereas other AMS have less than 60,000 kilometer each.

Figure 8.1. Road length (kilometers) by ASEAN Members States, 2006-2018



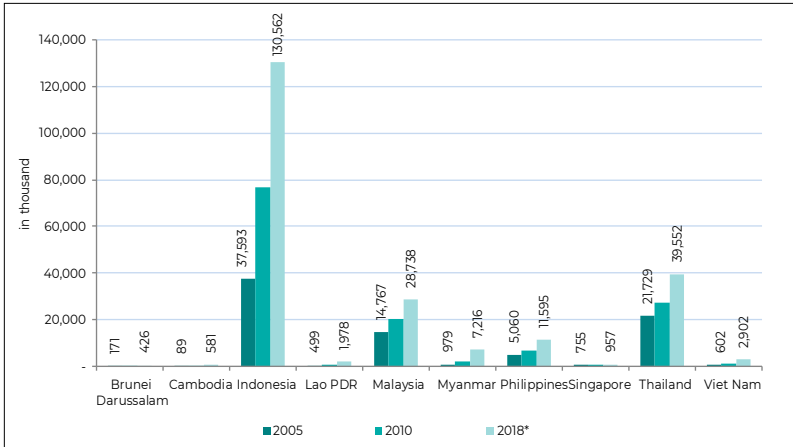
Note: *For Indonesia, Lao PDR, Malaysia, Singapore, and Viet Nam, the latest available data is 2017

Source: ASEAN Secretariat, ASEANstats database

Average increment of road length in all AMS during the period of 2006-2018 reached 61,825 kilometers annually. Of this, Thailand recorded the highest average increments of road length at over 19,000 kilometers annually, followed by Malaysia and Indonesia with an average increment above 12,000 kilometers annually.

Figure 8.2 also shows significant increases in the number of registered motor vehicles in AMS during the period 2005-2018, The total number of registered motor vehicles in 2018 was 224.5 million units, an increase of 173.0% compared to 2005. The increase was especially high in Myanmar (over 637.0%), Cambodia (551.1%), Lao PDR (296.1%), and Indonesia (247.3%).

Figure 8.2. Total number of registered road motor vehicles (000) by ASEAN Member States, 2005-2018

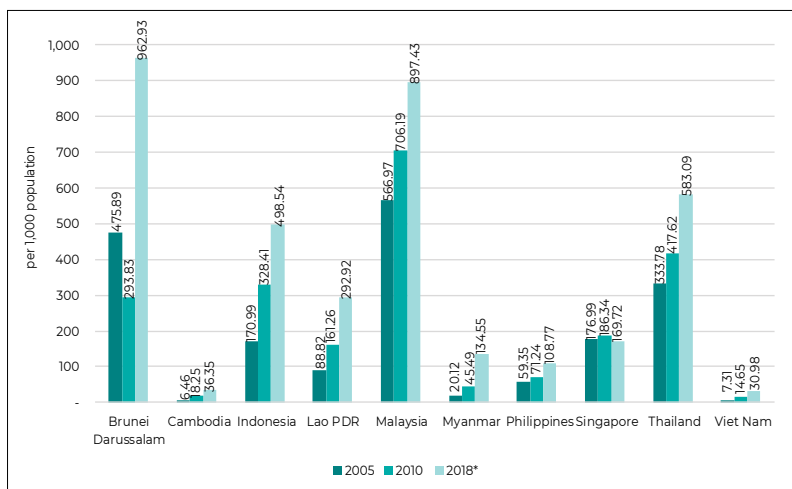


Note: * For Indonesia, Lao PDR, Malaysia, and Viet Nam, the latest available data is 2017

Source: ASEAN Secretariat, ASEANstats database

Due to its large population size, Indonesia has the highest number of registered motor vehicles among AMS, at 130.6 million units, or more than 58.2% of ASEAN's total registered motor vehicles in 2018. However, taking into account the size of the population, Figure 8.3 shows that Brunei Darussalam, Malaysia, and Thailand recorded the highest number of total registered motor vehicles per 1000 population at 962.9, 897.4, and 583.1, respectively in 2018. On the other hand, the number in Cambodia, and Viet Nam were below 100 units of registered motor vehicles per 1000 population in 2018.

Figure 8.3. Total registered motor vehicles per 1000 population by ASEAN Member States, 2005-2018



Note: * For Indonesia, Lao PDR, Malaysia, and Viet Nam, the latest available data is 2017

Source: ASEAN Secretariat, ASEANstats database

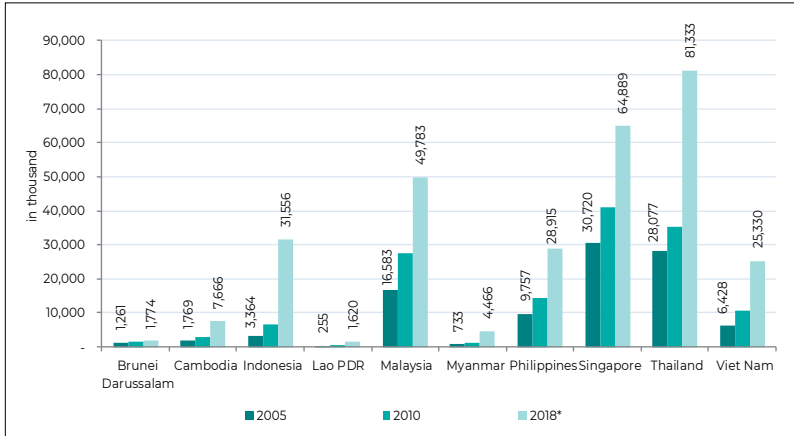
Air transport

Statistics on international air passengers, i.e international passengers carried by registered air carriers, indicate the extent to which a country is an attractive or important international destination. Figure 8.4 shows that the total number of international air passengers in all AMS has grown rapidly from 98.9 million in 2005 to 297.3 million in 2018, or an increase of 300.5%. Thailand (81.3 million), Singapore (64.9 million), Malaysia (49.8 million), and Indonesia (31.6 million) are countries with the highest numbers of international air passengers in 2018. Meanwhile, the number of international air passengers in Brunei Darussalam, Cambodia, Lao PDR, and Myanmar were below 8 million.

In terms of growth, Indonesia has the fastest growing number of international air passenger at a rate of 20.5% per year during the period of 2005-2018. Significant growth was also observed in Lao PDR (16.7% per

year), Myanmar (16.2% per year), and Cambodia (13.0% per year) over the same period.

Figure 8.4. Number of international air passengers (000) by ASEAN Member States, 2005-2018



Note: * For Indonesia, Lao PDR, Malaysia, and Viet Nam, the latest available data is 2017

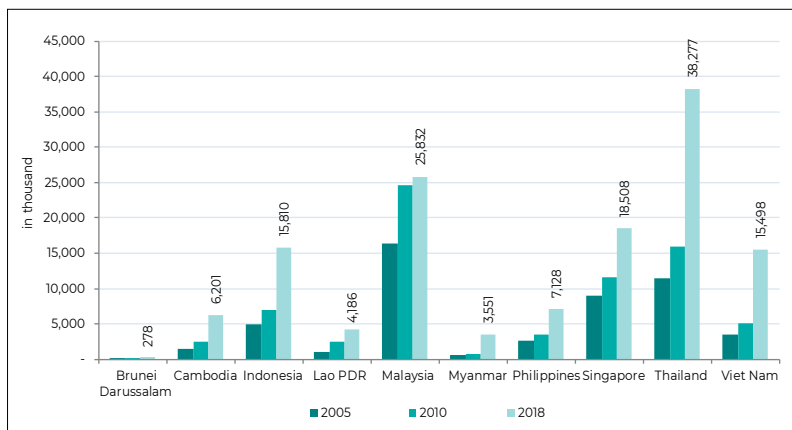
Source: ASEAN Secretariat, ASEANstats database.

Visitor arrivals

Total number of visitor⁸ arrivals, to ASEAN has markedly increased during the period of 2005-2018, reaching 135.3 million in 2018 – or an increase of 263.7% from 2005 (Figure 8.5).

⁸ A visitor is a traveler taking a trip to main destination outside his/her usual environment, for less than a year, for any main purpose other than to be employed by a resident entity in the country visited (International Recommendations for Tourism Statistics 2008)

Figure 8.5. Number of visitor arrivals (000) by ASEAN Member States, 2005- 2018

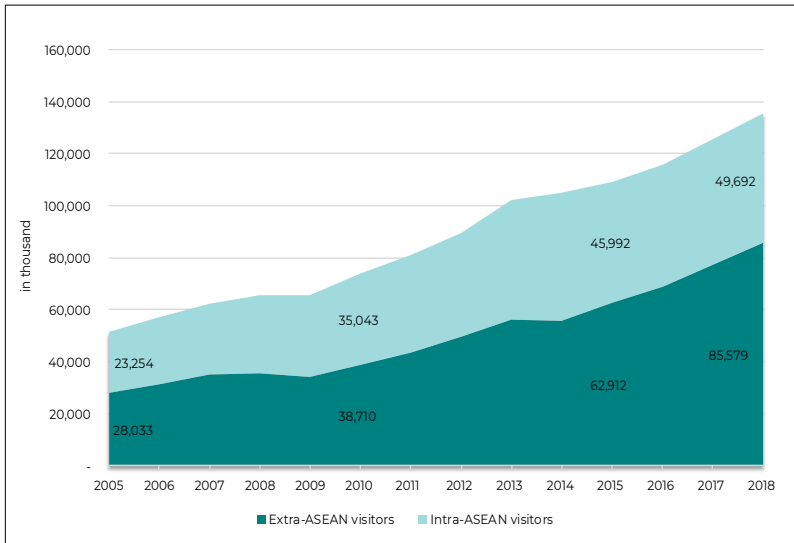


Source: ASEAN Secretariat, ASEANstats database.

The countries with the largest visitor arrivals in 2018 were Thailand (38.3 million), Malaysia (25.8 million), Singapore (18.5 million), Indonesia (15.8 million), and Viet Nam (15.5 million). On the other hand, Lao PDR and Myanmar received less than 5 million visitors.

Figure 8.6 indicates that intra-ASEAN visitors made up 49.7 million or 36.7% of total visitor arrivals to ASEAN in 2018, an increase of 212.2% from 15.9 million arrivals recorded in 2005.

Figure 8.6. Intra and extra-ASEAN visitor arrivals (000), 2005-2018

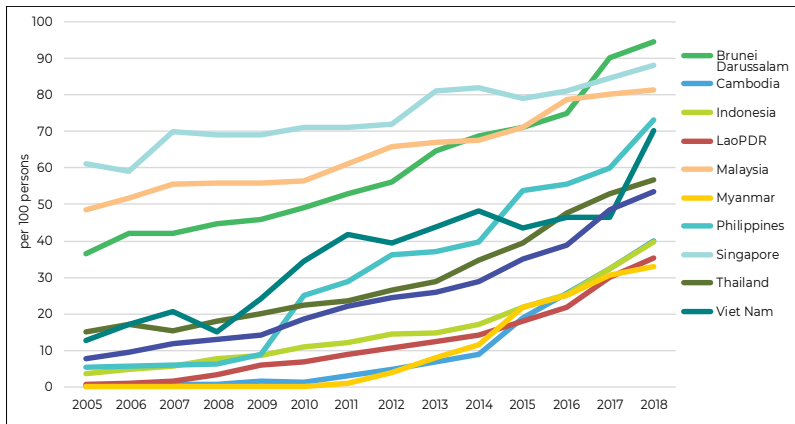


Source: ASEAN Secretariat, ASEANstats database.

Internet subscribers

AMS experienced rapid progress in the use of internet in recent years. Figure 8.7 shows that the total number of internet subscribers in all AMS reached 53.4 per 100 population in 2018, as compared to only 7.8 in 2005. Brunei Darussalam, Singapore and Malaysia recorded very high coverage of internet use with 94.6, 88.2, and 81.2 subscribers per 100 population respectively. Although the internet subscribers in other remaining ASEAN countries were relatively lower, significant progress had been made over the last decade.

Figure 8.7. Number of internet subscribers per 100 persons by ASEAN Member States, 2005-2018



Source: ASEAN Secretariat, ASEANstats database.

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