

**ASEAN at 50: Notes on Opportunities and
Challenges from China and India**
PIDS-ERIA Public Symposium

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Opportunities



Proximity: growth
area



Size of Market



Forward Looking
Potential Trade



FTAs and Connectivity

EXPORTS OF CHINA TO ASEAN(2016)

	Value	Trade Balance*	Share	Growth**
Philippines	29,836,567	12,440,676	1.4	16
Thailand	37,182,731	-1,349,612	1.8	5
Indonesia	32,117,495	10,703,459	1.5	-2
Vietnam	61,094,097	23,922,493	2.9	16
Malaysia	37,660,167	-11,609,470	1.8	0
Singapore	44,495,953	18,481,704	2.1	3
Myanmar	8,187,651	4,089,942	0.4	11
Cambodia	3,928,685	3,098,172	0.2	9
Laos	986,967	-372,641	0	-2
Brunei	510,852	289,306	0	-18
ASEAN	256,001,165	59,694,029	12.1	6.6%

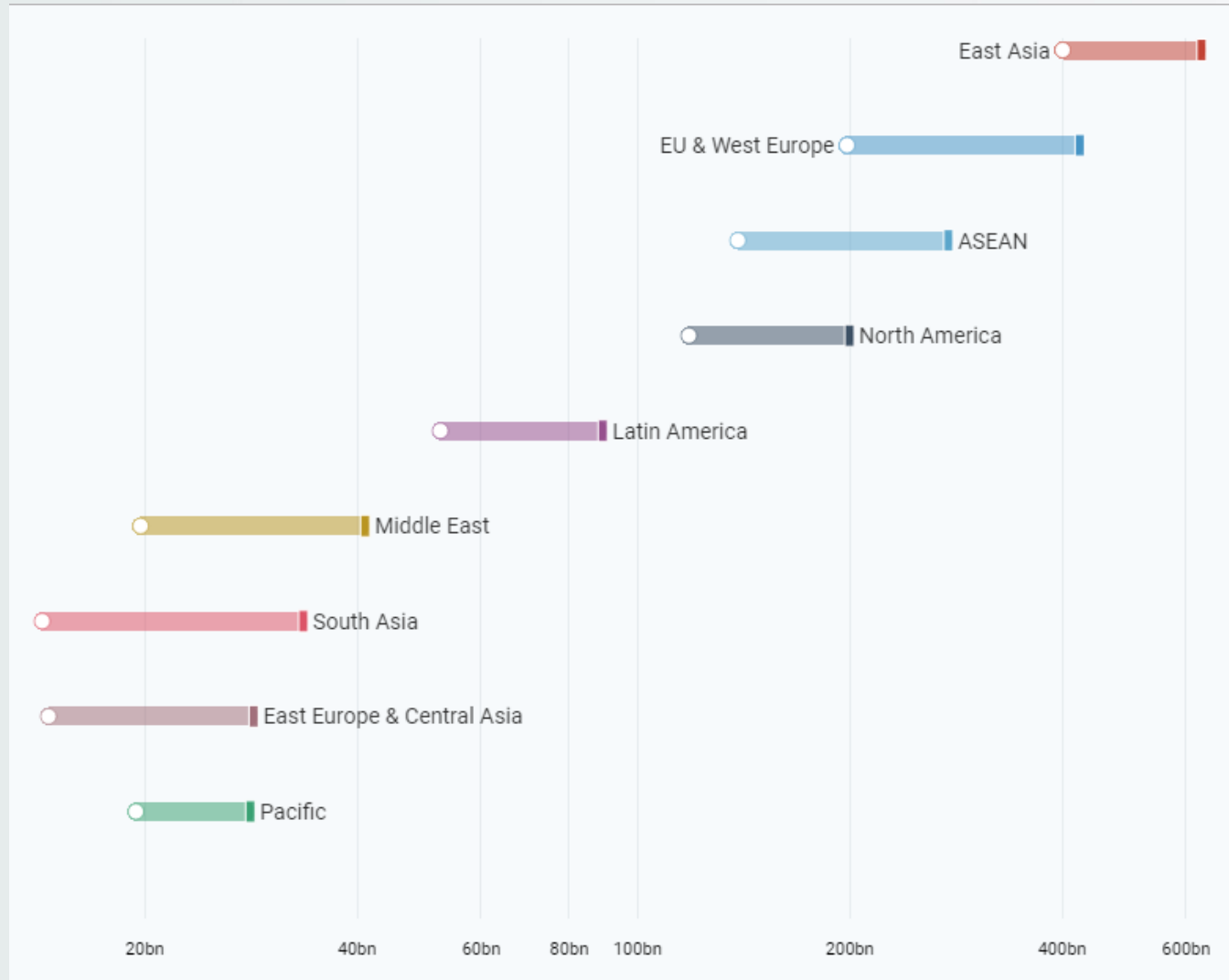
Source: Trademap *trade balance of
China with partner **2012-16

EXPORTS OF ASEAN TO CHINA (2016)

	Value	Trade Balance	Share	Growth**
Philippines	17,395,891	12,440,676	1.1	-2
Thailand	38,532,343	-1,349,612	2.4	0
Indonesia	21,414,036	10,703,459	1.3	-12
Vietnam	37,171,604	23,922,493	2.3	25
Malaysia	49,269,637	-11,609,470	3.1	-4
Singapore	26,014,249	18,481,704	1.6	-3
Myanmar	4,097,709	4,089,942	0.3	34
Cambodia	830,513	3,098,172	0.1	39
Laos	1,359,608	-372,641	0.1	16
Brunei	221,546	289,306	0	-9
ASEAN	196,307,136	59,694,029	12.3	1.4%

Source: Trademap * trade balance of
China with partner ** 2012-16

POTENTIAL EXPORTS TO CHINA



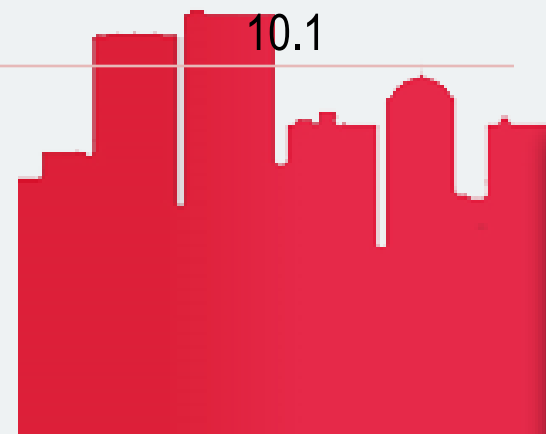
Source: Export Potential Map



POTENTIAL EXPORTS TO CHINA BY REGIONS

	Export Potential	Actual Exports	Untapped Potential
East Asia	610.4	401.9	243.6
EU and West Europe	410	198.7	226.7
ASEAN	267	139.1	136.4
North America	193.3	118.6	92
Latin America	86.3	52.7	37.9
Middle East	39.7	19.8	22.4
South Asia	32.5	14.3	20.2
East Europe and Central Asia	27.6	14.6	15.6
Pacific	27.3	19.5	10.1

Source: Export Potential Map



EXPORTS OF INDIA TO ASEAN(2016)

	Value	Trade Balance*	Share	Growth**
Philippines	1,474,264	998,420	0.6	4
Thailand	2,962,384	-2,353,994	1.1	-6
Indonesia	3,131,503	-9,057,756	1.2	-18
Vietnam	5,957,677	2,852,052	2.3	9
Malaysia	4,188,651	-4,464,700	1.6	1
Singapore	7,354,855	635,376	2.8	-17
Myanmar	1,141,174	56,240	0.4	18
Cambodia	109,283	66,070	0	0
Laos	23,931	-148,481	0	-4
Brunei	37,448	-424,512	0	-1
ASEAN	26,381,170	-11,841,285	10.0	-5.8%

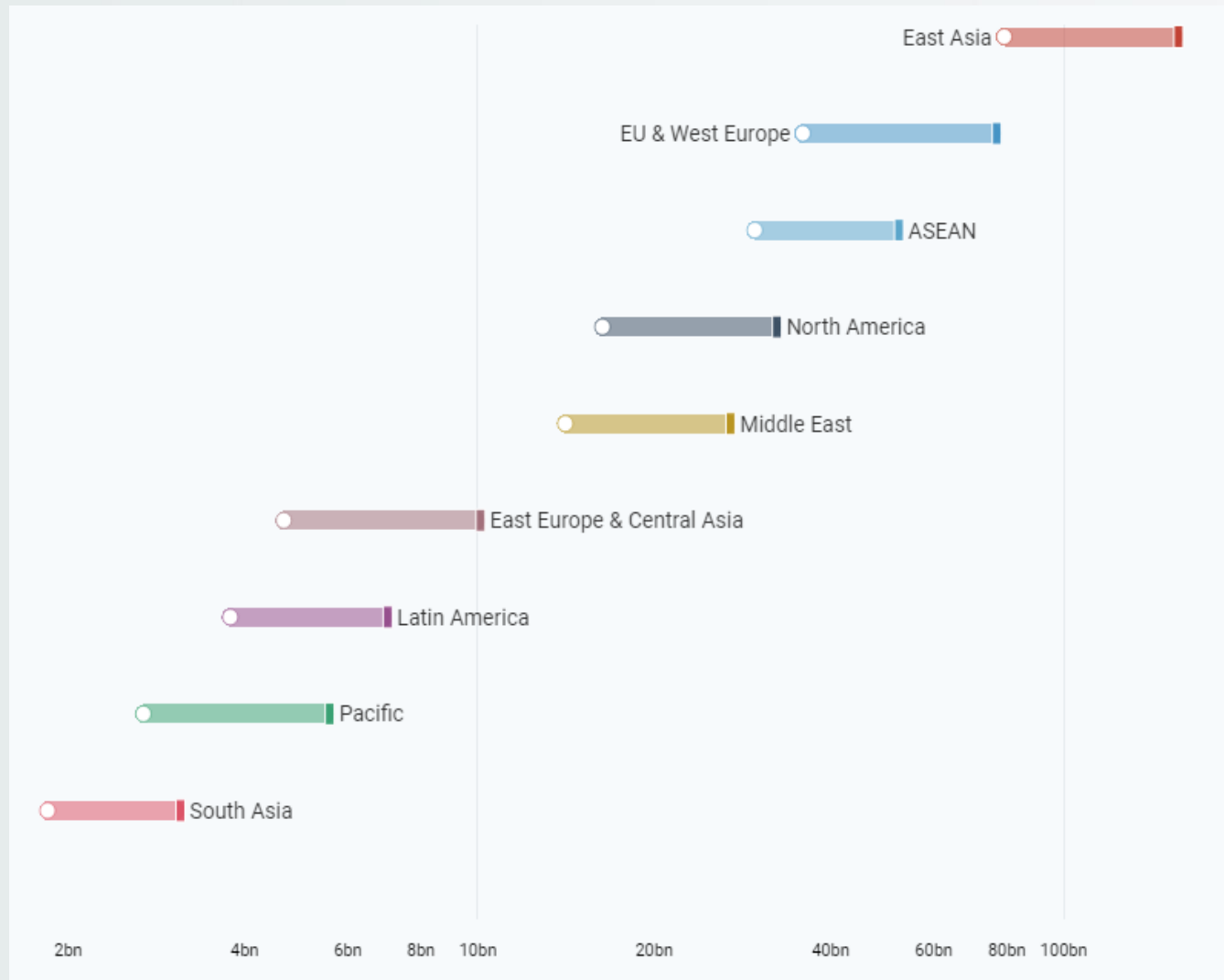
Source: Trademap * trade balance of India with partner **2012-16

EXPORTS OF ASEAN TO INDIA (2016)

	Value	Trade Balance*	Share	Growth**
Philippines	475,844	998,420	0.1	2
Thailand	5,316,378	-2,353,994	1.5	0
Indonesia	12,189,259	-9,057,756	3.4	-4
Vietnam	3,105,625	2,852,052	0.9	9
Malaysia	8,653,351	-4,464,700	2.4	-4
Singapore	6,719,479	635,376	1.9	-2
Myanmar	1,084,934	56,240	0.3	-7
Cambodia	43,213	66,070	0	51
Laos	172,412	-148,481	0	6
Brunei	461,960	-424,512	0.1	-15
ASEAN	38,222,455	-11,841,285	10.6	-2.2%

Source: Trademap, *trade balance of India with partner **2012-16

POTENTIAL EXPORTS TO INDIA

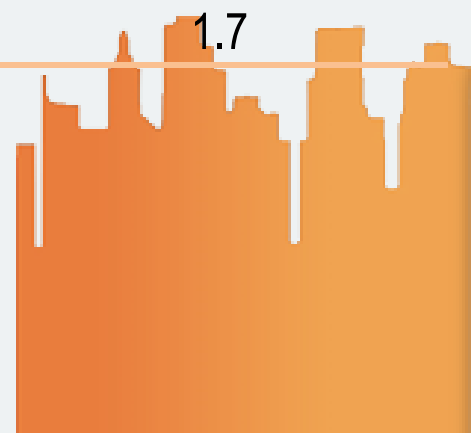


Source: Export Potential Map

POTENTIAL EXPORTS TO INDIA BY REGIONS

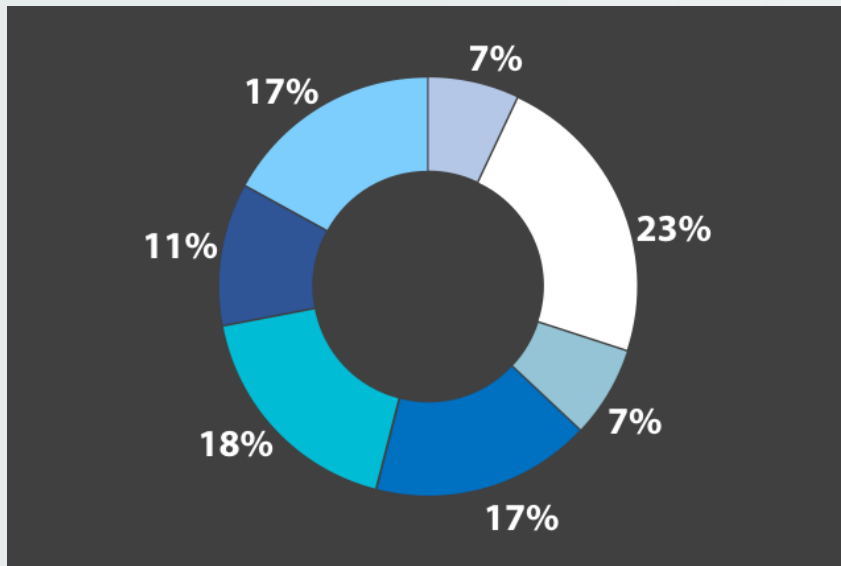
	Export Potential	Actual Exports	Untapped Potential
East Asia	151	79.4	78.2
EU and West Europe	73.9	36	43.9
ASEAN	50.3	29.8	25.3
North America	31.2	16.4	18
Middle East	26	14.1	14.4
East Europe and Central Asia	9.7	4.7	6.3
Latin America	6.8	3.8	3.7
Pacific	5.4	2.7	3.1
South Asia	3	1.8	1.7

Source: Export Potential Map

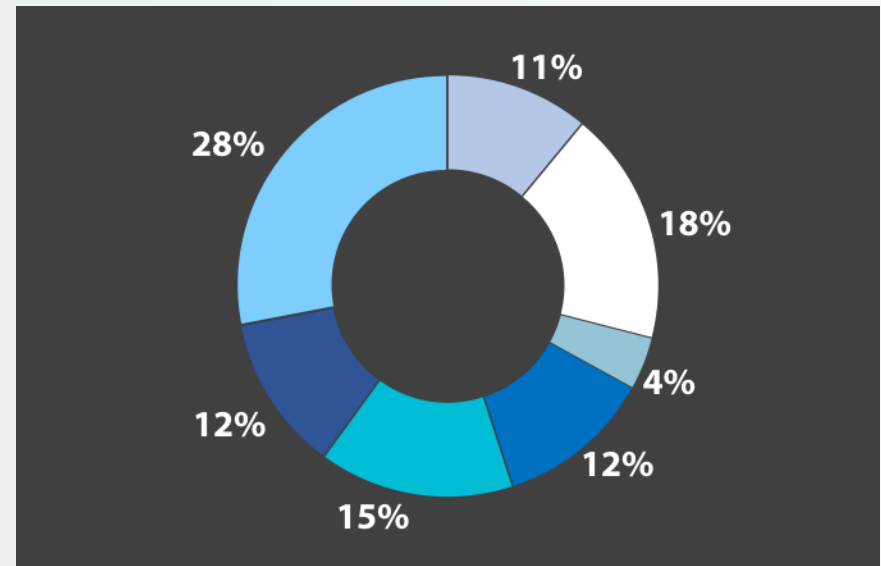


Projected Composition of World GDP 2030 (in 2005 PPPs)

2011



2030



- ◆ USA
- ◆ China
- ◆ Other non-OECD
- ◆ Euro Area
- ◆ India
- ◆ Japan
- ◆ Other OECD

Note: Global GDP is taken as sum of GDP for 34 OECD and 8 non-OECD G20 countries

Reference: "Looking to 2060: Long-term global growth prospects," OECD Economic Policy Papers No. 03 (November 2012)



Challenges...



ASEAN Centrality



Defensive Interests in Trade



Risk Factors

Thanks...