

Asia-Pacific Subregional Trade Briefs: South-East Asia

- In 2013, South-East Asia's performance measured by the key trade and investment indicators was positive. Merchandise exports increased by 1.7% while the services sector had strong export growth of 6.9%, positioning the subregion as the second largest exporter of services in Asia-Pacific after East and North-East Asia. The subregion's positive growth in 2013 was in line with the overall Asia-Pacific total of merchandise export growth of 2.1% and services export growth of 4.9%. As for the subregion's imports, merchandise imports and services imports grew by 1.9% and 3.9%, respectively [Figure 1].
- South-East Asia's intra-regional trade with the Asia-Pacific is significant: 68% of exports go to destinations within the Asia-Pacific region. Similarly, the subregion imported around 64% of its merchandise from the Asia-Pacific, higher than the 49% figure for intraregional imports within the Asia-Pacific as a whole [Figure 2].
- FDI inflows to the subregion continue to rise. However, the growth in 2013 of 6.7% was more moderate than in the previous year when it rose by 18%. The 2013 growth figure is similar to the Asia-Pacific regional total of 6.6% growth [Figures 1 and 3]. In contrast, FDI outflows from South-East Asia have been broadly flat since 2010.
- Greenfield FDI into South-East Asia from Asia-Pacific countries increased by 7% to \$35 billion in 2013. The fastest growth in greenfield FDI was seen in Myanmar which registered an increase of over 633%, up to \$12 billion from only \$1.6 billion in 2012. Positive greenfield FDI growth in South-East Asia is in contrast to the overall fall in greenfield FDI flows in the Asia-Pacific region, which contracted by 20.4% to \$84 billion [Figure 4].
- Over the period 2010-2012, an average of 63% of total exports from South-East Asian countries went to PTA partners. Imports from PTA partners were even higher at 68% on average. Looking at the whole Asia-Pacific region, over the 2010-2012 period, PTA partners accounted for on average 38% of their total exports and 39% of imports. [Figure 5].

Figure 1. Key Trade and Investment Indicators

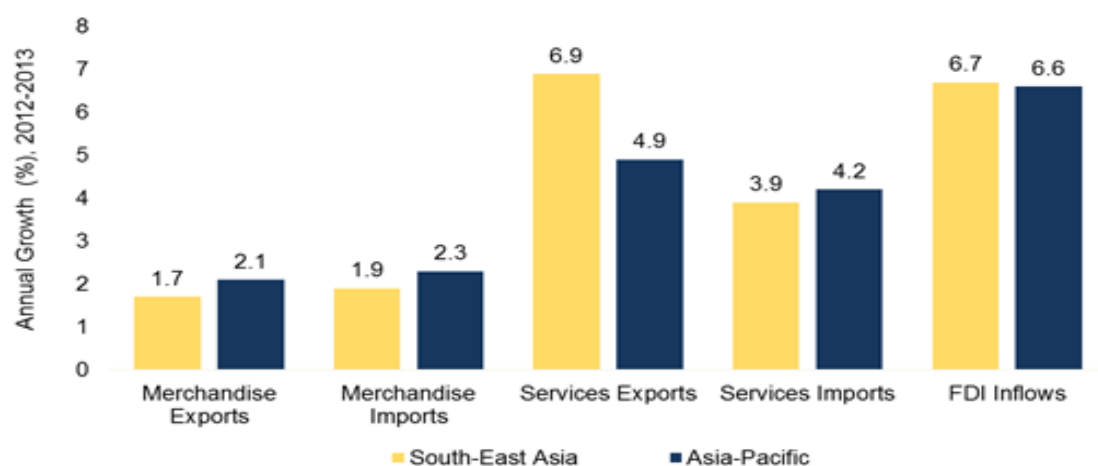


Figure 2. Intraregional Trade As a Share of Total Trade

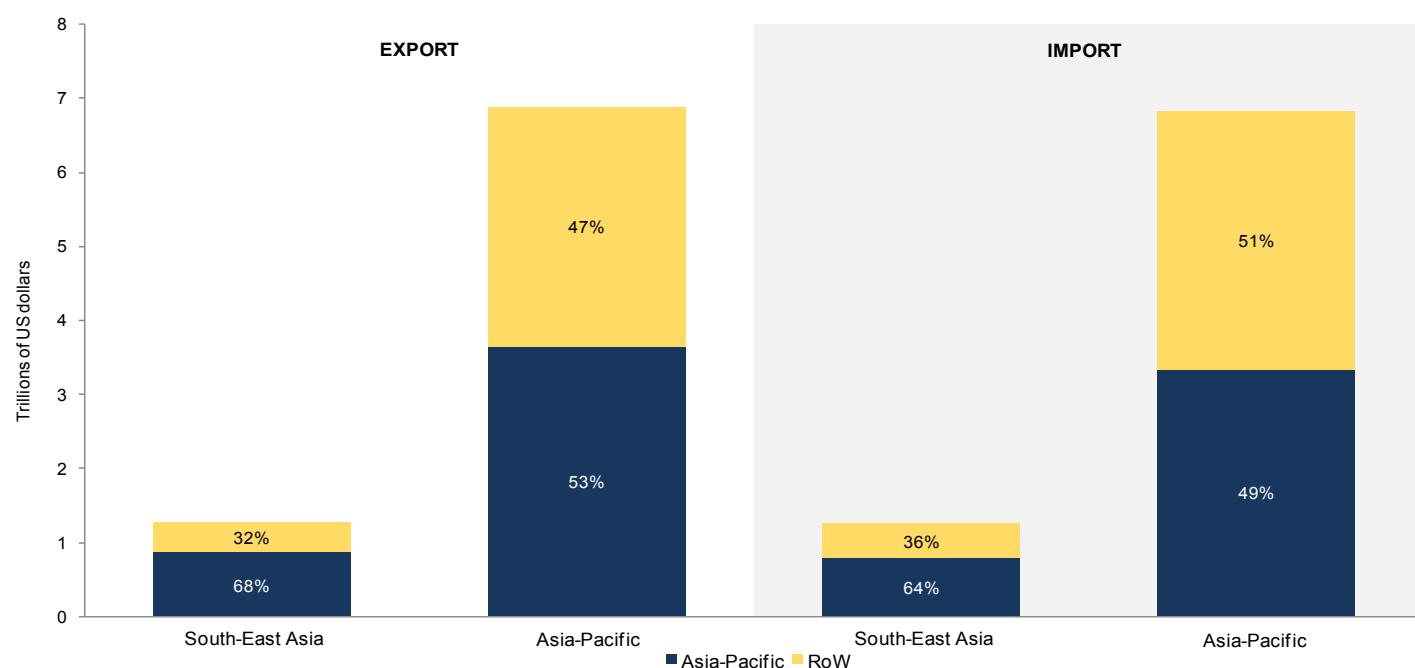


Figure 3. FDI Flows

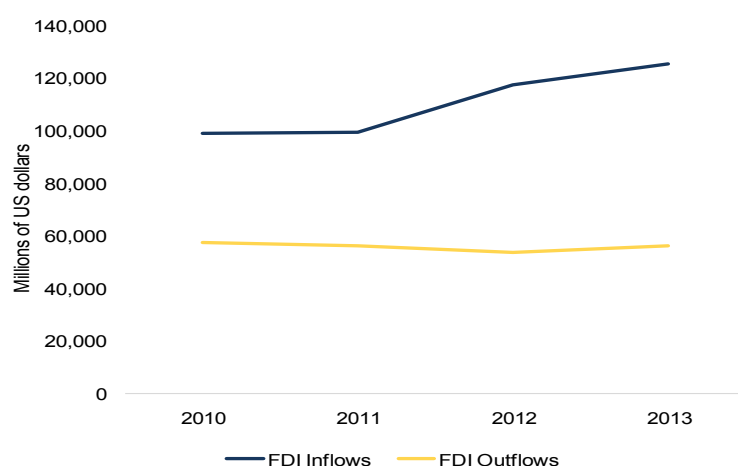
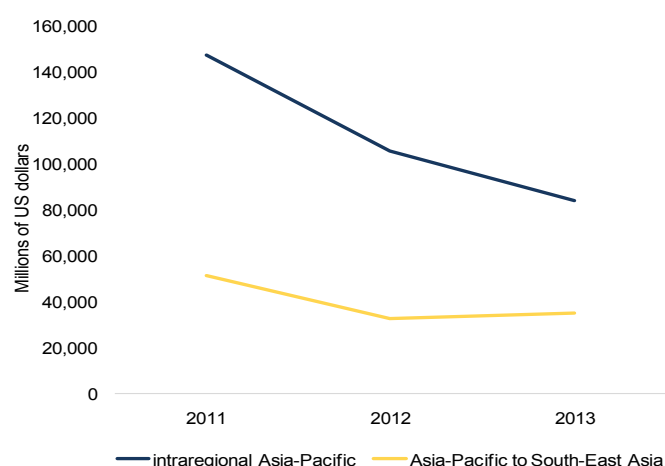


Figure 4. Intraregional Greenfield FDI



Source: fDi Intelligence 2014

Figure 5. Trade Coverage Under Preferential Trade Agreements in %, Average

	2007-2009		2010-2012	
	Export	Import	Export	Import
Asia-Pacific	37.66	45.72	38.10	38.64
South-East Asia	61.84	70.12	63.14	67.66
Brunei Darussalam	92.57	63.51	98.68	76.84
Cambodia	8.81	69.75	18.19	73.98
Indonesia	61.32	76.29	68.87	69.49
Lao PDR	82.41	93.92	87.86	94.03
Malaysia	54.62	59.58	64.99	62.21
Myanmar	88.29	92.93	92.19	94.96
Philippines	46.69	54.05	62.52	71.95
Singapore	67.29	66.11	68.38	74.20
Thailand	49.66	53.46	52.62	55.01
Viet Nam	66.77	71.60	46.66	70.23

Notes

ASEAN: Association of South-East Asian Nations
 FDI: foreign direct investment
 RoW: rest of the world
 Definitions
 Greenfield FDI: investment in a productive capacity, or establishment of a new foreign affiliate without merging with or buying existing local firms (UNCTAD)
 The South-East Asia subregion includes: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor-Leste, and Viet Nam.

Source: Asia-Pacific Trade and Investment Report (APTIR) 2014 unless otherwise specified.
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