



ASEAN

KEY FIGURES 2023



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one community



ASEAN Key Figures 2023

The ASEAN Secretariat
Jakarta

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

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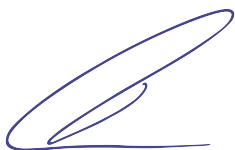
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FOREWORD

The significance of relevance, timeliness, accuracy, reliability, accessibility, and comparability in statistics cannot be overstated in a number of contexts, including in informing robust policy design and facilitating effective monitoring and evaluation of the ASEAN Community-building efforts.

This sixth edition of ASEAN Key Figures, the first of its kind after the COVID-19 pandemic, showcases a comprehensive overview of the latest developments within the ASEAN region. Through a selection of indicators in the areas of *Population and Welfare, Economy, Connectivity, and Energy and Environment*, this publication offers valuable information and insights. Included within are a number of Sustainable Development Goals (SDGs) indicators, this provides a means to track the region's progress towards the attainment of the goals. The data, presented through user-friendly visualisations accompanied with concise text, are designed to enhance users' understanding of the nuances among the ASEAN Member States.

I hope this publication will serve as a useful resource and reference tool for those navigating the ASEAN official statistics in their endeavours to better understand the region in terms of numbers as well as for contributing to the ongoing integration efforts of ASEAN.



DR. KAO KIM HOURN

Secretary-General of ASEAN

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INTRODUCTION

ASEAN Key Figures is published annually as part of the continuous efforts to promote the use and visibility of ASEAN statistics, while also contributing to the monitoring of economic and social development in the region. This publication is designed to serve as a useful introduction to the ASEAN official statistics, providing users with insights into the conditions of both ASEAN as whole and its individual ASEAN Member States.

This 2023 edition specifically highlights recent developments across diverse topics, incorporating key statistics related to people and welfare; economy; connectivity; and energy and environment. With an improved data visualisation and concise narrative, users will find it easier to digest the wealth of information on statistical indicators presented and discussed in this publication. The statistics presented in this publication focus on annual data and are based on the information available in the ASEANstats database as of 31 October 2023. More complete data and information about ASEAN can be found on the ASEANstats website (www.aseanstats.org). This publication, alongside with the ASEAN Statistical Yearbook and the ASEAN Statistical Highlights, is also accessible on the ASEANstats website (www.aseanstats.org), providing a consolidated platform for valuable insights into ASEAN's economic and social landscape.



1

POPULATION AND WELFARE



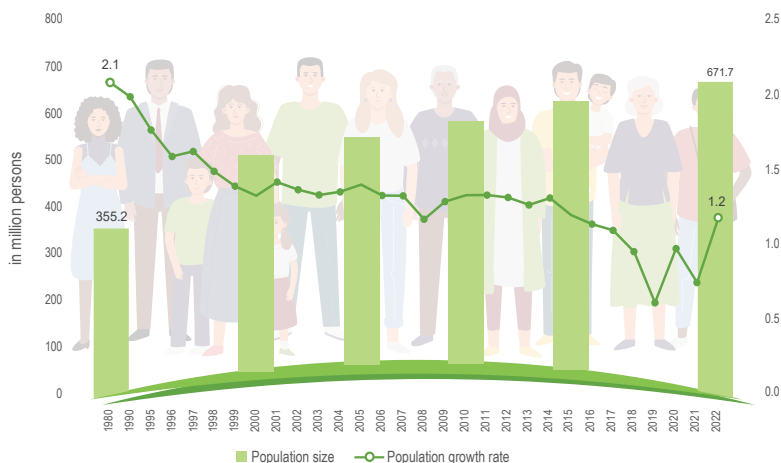
POPULATION AND WELFARE

1.1 POPULATION AND WELFARE

Population: size and structure

In 2022, the combined population of ten ASEAN Member States (AMS) reached 671.7 million, maintaining the ASEAN's position as the third-most populous region in the world, following India and China. Meanwhile, the rate of ASEAN population growth had gradually slowed down in recent decades. The slowing growth rate is evident through the decline in the average annual growth rate for the period of 1999-2010 and 2011-2022, which were 1.3% and 1.1%, respectively. The trend in ASEAN population growth rate is reflected in Figure 1.1.1.

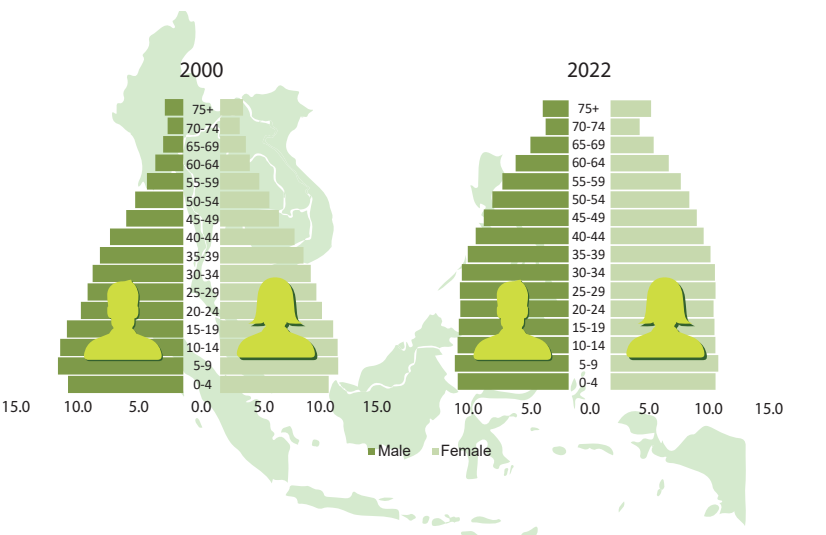
Figure 1.1.1. Population size (million persons) and growth rate (%), ASEAN total, 1980-2022



Source: ASEAN Secretariat, ASEANstats database

The age structure of ASEAN population had also shifted in the last two decades, as shown by the population pyramid¹ of ASEAN in 2000 and 2022 in Figure 1.1.2. In 2000, youth² dominated the ASEAN population, accounting for 40.8% of the region's total population. In 2022, although the absolute number of youth population continued to increase, their share of the total population dropped to 32.5%. Meanwhile, during the same period, the share of productive working-age population and the elderly population increased to 59.9% (from 53.9%) and 7.5% (from 5.3%), respectively.

Figure 1.1.2. Population pyramid (% of total), ASEAN total, 2000 and 2022



Source: ASEAN Secretariat, ASEANstats database

Furthermore, the population pyramid also reveals that males tend to have shorter lifespans compared to females. As of 2022, the proportion of elderly women in the overall female population was 8.4%, whereas the proportion of elderly men in the overall male population was 6.6%.

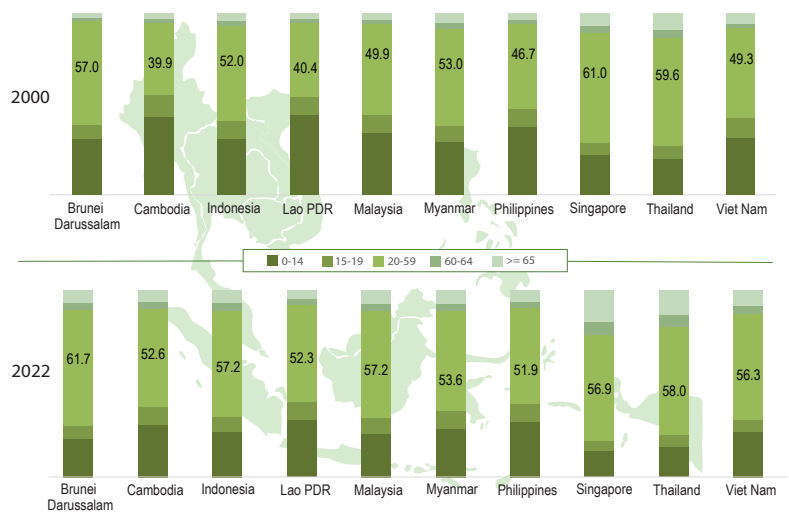
1 The population pyramid reveals the makeup of the population as a whole by age groups and sex.

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

Changes in population structure were likely influenced by the ongoing demographic transition in AMS, which was concurrent with the changes in fertility and mortality rates as discussed later in this chapter. However, due to the diverse level of development in AMS, their demographic transition phases will also vary.

From 2000 to 2022, the proportion of the population aged 65-years-old and above increased in all AMS (Figure 1.1.3), with Singapore and Thailand experiencing significant growth, from 7.2% and 9.1% in 2000 to 16.6% and 12.9% in 2022, respectively. On the other hand, all AMS experienced a decline in the proportions of the youth population aged 0–19.

Figure 1.1.3. Population age structure (% of total) by ASEAN Member States, 2000 and 2022



Note : Singapore data refer to resident only
Source : ASEAN Secretariat, ASEANstats database

Figure 1.1.3 also illustrates a rising proportion of the productive working-age population (20–59 years old) across all AMS, except Singapore, with

increases ranging from 0.6 to 14.3 percentage points. A large proportion of the productive population will potentially contribute to the expansion of the economy and the alleviation of poverty.

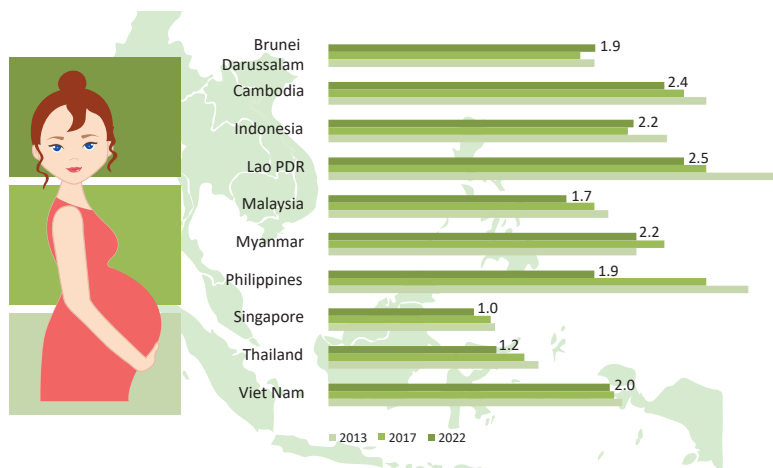
Fertility

The total fertility rate (TFR) is one of the key elements of population growth, along with mortality and migration. The TFR in a specific year is defined as the total number of children that would be born to each woman if she were to live to the end of her child-bearing years and give birth to children in agreement with the prevailing age-specific fertility rates. Assuming there are no migration flows and that mortality rates remain unchanged, a total fertility rate of 2.1 children per woman generates broad stability of population and is also referred to as the “replacement fertility rate” (OECD, 2016).

As shown in Figure 1.1.4, TFR in AMS generally decreased during the last decade. Significant decline in TFR was observed in the Philippines, with a decline from 3.0 in 2013 to 1.9 in 2022. Similarly, the TFR in Lao PDR decreased from 3.2 in 2013 to 2.5 in 2021, potentially leading to a reduction in the rate of population growth in the country. Meanwhile, TFR in Brunei Darussalam in 2022 and Myanmar in 2021 reached rates of 1.9 and 2.2, respectively, which were similar to the rates observed in 2013. The lowest TFR were recorded in Singapore and Thailand, at 1.0 and 1.2, respectively.

In 2022, TFRs in Brunei Darussalam, Malaysia, the Philippines, Singapore, Thailand, and Viet Nam fell below the replacement level. A decrease in TFR, for a certain period of time, could foster economic growth because it leads to a reduction in the proportion of children and an increase in the proportion of the working-age population. However, in the long run, especially if fertility continues to decline, the number of the working-age population will decrease while the number of elderly people will increase, resulting in an ageing population. This may increase the economic burdens by, among other things, increasing health care and social security costs.

Figure 1.1.4. Total fertility rates (TFR) by ASEAN Member States, 2013, 2017, and 2022



Note : The latest available data for Lao PDR, Malaysia, and Myanmar is 2021

Source : ASEAN Secretariat, ASEANstats database

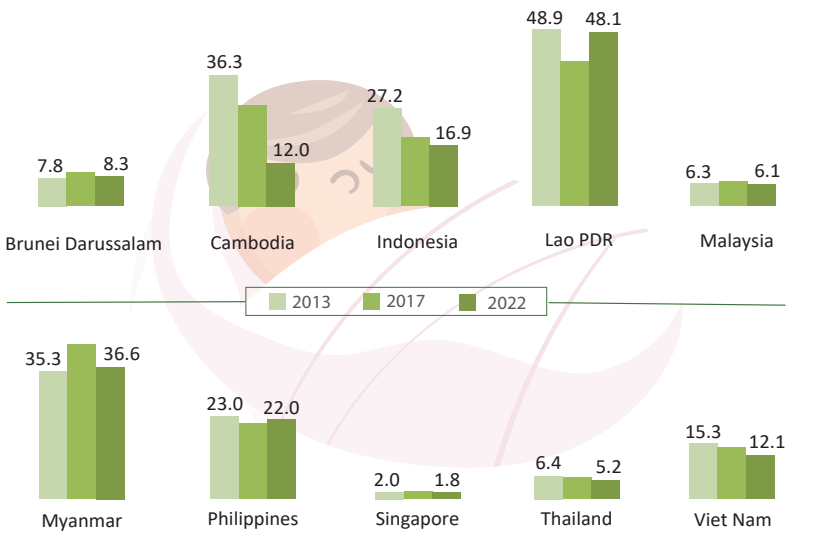
Mortality and Life Expectancy

As discussed in the preceding section, along with fertility and migration, mortality also plays a significant role in population growth. Among various mortality indicators, infant mortality rate and under-five mortality rate are commonly used to portray the socio-economic conditions of children as well as to assess the performance of the health care system.

The infant mortality rate is defined as the probability of a child born in a specific period dying before reaching the age of one, expressed per 1,000 live births. Figure 1.1.5 presents the infant mortality rate in AMS over the past decade. Overall, AMS, apart from Myanmar, observed a decline in the infant mortality rate. Cambodia experienced the most significant decline, with the rate dropping from 36 deaths per 1,000 live births in 2013 to 12 deaths per 1,000 live births in 2021, followed by Indonesia, where the rate declined from 27 to 17 deaths per 1,000 live births. In recent years, Lao PDR

had the highest infant mortality rate, with 48 deaths per 1,000 live births. In contrast to other AMS, Myanmar reported an infant mortality rate at 37 deaths per 1,000 live births, which is slightly higher than 35 deaths per 1,000 live births recorded in 2013.

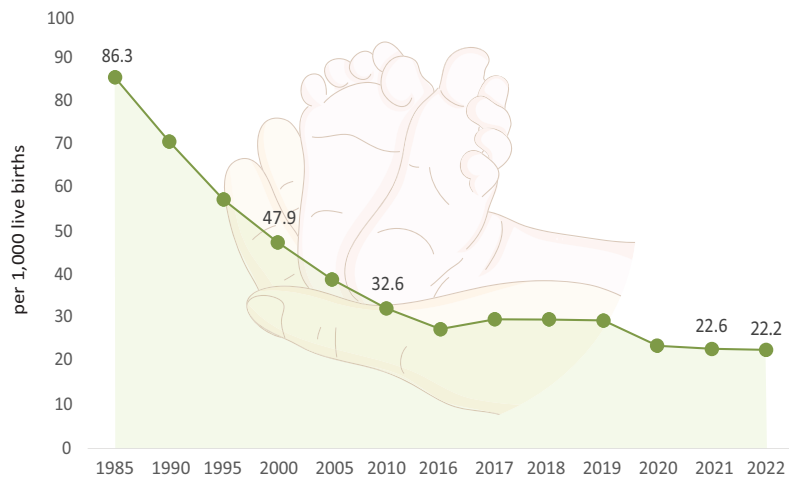
Figure 1.1.5. Infant mortality rate (per 1,000 live births), 2013, 2017 and 2022



Note : The latest available data for Cambodia, Lao PDR, Malaysia, and Thailand is 2021
Source : ASEAN Secretariat, ASEANstats database

Under-five mortality rate is defined as the probability of a newborn would die before reaching exactly 5 years of age, expressed per 1,000 live births. On average, ASEAN succeeded in achieving the Sustainable Development Goals (SDGs) target of reducing under-5 mortality to at least as low as 25 per 1,000 live births by 2030. The under-five mortality rate in ASEAN dropped significantly from 86 deaths per 1,000 live births in 1985 to 22 deaths per 1,000 live births in 2022, as depicted in Figure 1.1.6.

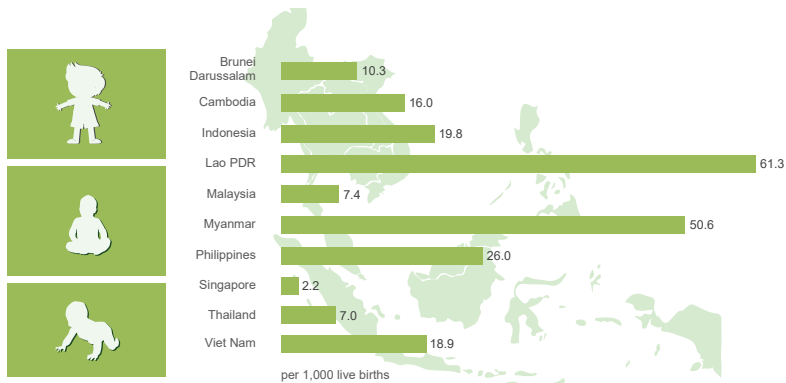
Figure 1.1.6. Under-five mortality rates (per 1,000 live births), ASEAN total, 1985-2022



Note : The latest available data for Malaysia is 2021, Indonesia and Thailand is 2020, the Philippines is 2017
Source : ASEAN Secretariat, ASEANstats database

Figure 1.1.7 indicates that the disparity in mortality rates for children under five continued among AMS. Seven out of ten AMS have met the SDGs target of reducing the mortality rate among children under the age of five. Singapore reported the lowest rate at two deaths per 1,000 live births, followed by Malaysia, Thailand, and Brunei Darussalam with 7, 7, and 10 deaths per 1,000 live births, respectively. In addition, Cambodia, Viet Nam and Indonesia have also achieved the SDGs target with under-five mortality rate at 16, 19 and 20 deaths per 1,000 live births, respectively. With a rate of 27 deaths per 1,000 live births, the Philippines is getting closer to the SDGs' target. On the other hand, there is still significant work to be done to reduce the under-five mortality rate in Myanmar and Lao PDR, which have higher rates of 51 and 61 deaths per 1,000 live births, respectively, indicating that more than half of children died before the age of five.

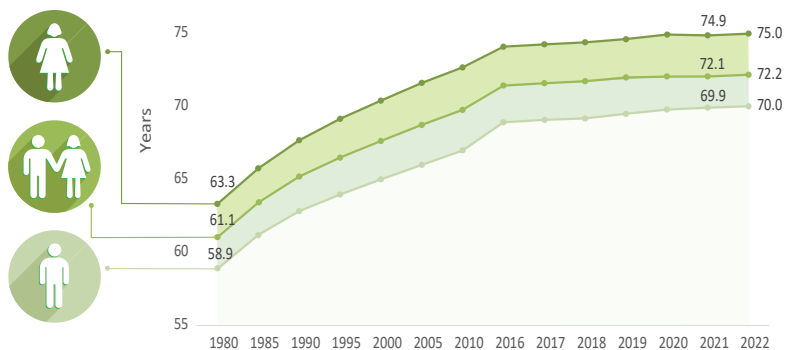
Figure 1.1.7. Under-five mortality rates (per 1,000 live births) by ASEAN Member States, 2022



Note : The latest available data for Malaysia is 2021, Indonesia and Thailand is 2020
Source : ASEAN Secretariat, ASEANstats database

A decrease in child mortality rates indicates enhancement in overall health and living conditions which consequently would lead to an improvement in 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 1.1.8. Life expectancy at birth (years), ASEAN total, 1980-2022

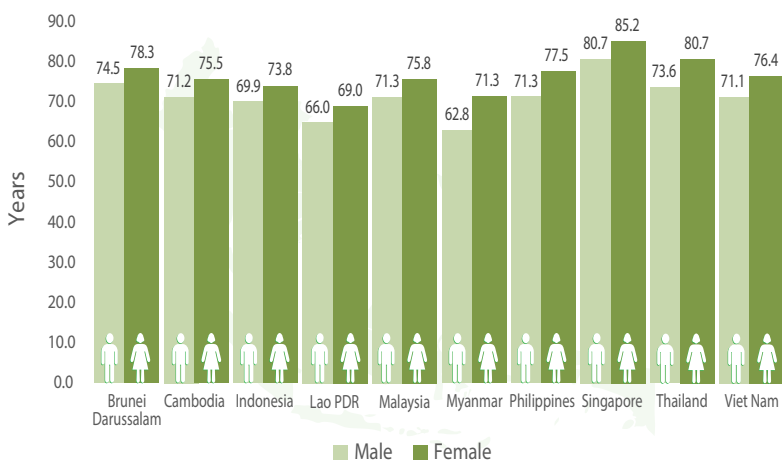


Source: ASEAN Secretariat, ASEANstats database

Figure 1.1.8 demonstrates that the average life expectancy at birth in ASEAN region in 2022 was recorded at 72.2 years, 11 years longer compared to the life expectancy recorded in the year 1980. Additionally, Figure 1.1.8 also indicates that in ASEAN, the average life expectancy of women was 75.0 years or five years longer than that of men.

Furthermore, Figure 1.1.9 illustrates that in 2022 women are expected to live longer than men in all AMS. Singapore recorded the highest life expectancy at birth, with women expected to live up to 85 years and men up to 81 years. Thailand follows closely with a life expectancy rate of 81 years for women and 74 years for men. In Brunei Darussalam, Cambodia, Indonesia, Malaysia, and the Philippines, the life expectancy for women ranges from 74 to 78 years, whereas for men it ranges from 70 to 75 years. Meanwhile, Lao PDR and Myanmar had the lowest life expectancy rates with 66 and 63 years, respectively, for males and 69 and 71 years, respectively, for females.

Figure 1.1.9. Life expectancy at birth (years) by ASEAN Member States, by sex, 2022



Note : The latest available data for Lao PDR is 2021
Source : ASEAN Secretariat, ASEANstats database

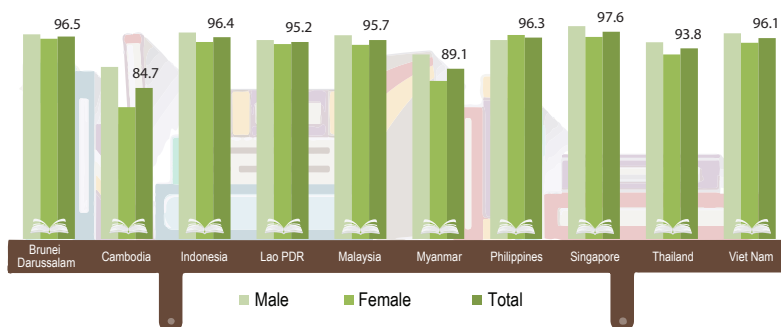
1.2. EDUCATION

Goal 4 of the 2030 agenda for sustainable development is to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all. This goal underscores that inclusive and high-quality education is one of the keys to achieve sustainable development. Adult literacy rate, net enrolment rate in primary education, gender parity index (GPI) for gross enrolment ratio in primary education, and pupil-teacher ratio in primary education are among various education-related indicators that are important to track the progress of education development in the ASEAN region.

Adult Literacy Rate

Adult literacy rate refers to the percentage of population aged 15 years and over who can both read and write with understanding a short simple statement on his/her everyday life. Adult literacy rate is one of the indicators used to monitor the target of the sustainable development agenda to ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy skills by 2030.

Figure 1.2.1. Adult literacy rate (%) by ASEAN Member States, 2022



Notes : 1. The latest available data for Brunei Darussalam, Lao PDR, and Singapore is 2021, Myanmar and the Philippines is 2019, Thailand is 2018

2. Brunei Darussalam's data refer to literacy rate aged 10 years and above

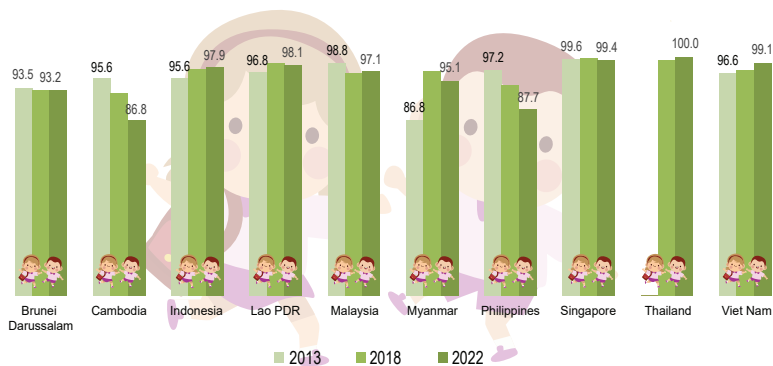
Source : ASEAN Secretariat, ASEANstats database

The level of adult literacy rate in AMS in 2022 for both men and women is presented in Figure 1.2.1. The majority of AMS had achieved a relatively high adult literacy rate in recent years, with more than 95% of their adult population are able to read and write. Singapore recorded the highest rate at 97.6%, while Cambodia recorded the lowest at 84.7%.

Net Enrolment Rate in Primary Education

The net enrolment rate (NER) in primary education measures the proportion of children of official primary school age who participate in primary education. Figure 1.2.2 indicates that NER in primary education in eight AMS exceeded 90% in 2022. The highest rate was recorded in Thailand where it nearly reached 100%, followed by Singapore with NER at 99.4%. The rates in Brunei Darussalam, Indonesia, Lao PDR, Malaysia, Myanmar, and Viet Nam ranged from 93.2% to 98.8%. Meanwhile, the Philippines and Cambodia reported NER in primary education rates of 87.7% and 86.8%, respectively. While NER in primary education has increased in Indonesia, Lao PDR, Myanmar, Thailand and Viet Nam over the past decade, it has decreased in the remaining AMS.

Figure 1.2.2. Net enrolment rate in primary education (%) by ASEAN Member States, 2013, 2018, and 2022



Notes : 1. The latest available data for Brunei Darussalam is 2018, Myanmar is 2020, Singapore is 2021
2. Singapore's data refer to total net enrolment rate in primary education
Source : ASEAN Secretariat, ASEANstats database

Gender Parity Index (GPI) for Gross Enrolment Ratio in Primary Education

Target 4.5 of SDGs aims to eliminate gender disparities in education and to ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations by 2030. The gender parity index (GPI) in education enrollment is one of indicators to monitor this target, it measures the ratio of the number of female students enrolled at certain level of education to the number of male students.

The GPI for gross enrolment ratio in primary education serves as a valuable indicator of gender equality in acquiring learning opportunities at primary education. A GPI of less than 1 reflects a higher level of disadvantage for girls in accessing educational opportunities, whereas a GPI greater than 1 indicates the opposite situation. Indonesia and Singapore had reached gender parity in gross enrolment in primary education as depicted in Figure 1.2.3. With GPIs at 0.98 and 0.97, Cambodia, Lao PDR, and Myanmar are close to gender parity on enrolment ratio in primary education. Meanwhile, the parity index in Brunei Darussalam, Thailand and Viet Nam was recorded at 1.01, indicating a slight disadvantage for boys.

Figure 1.2.3. Gender parity index (GPI) gross enrolment rate in primary education, ASEAN Member States, 2022



Notes : The latest available data for Malaysia and Singapore is 2021, Cambodia is 2020, Myanmar and Thailand is 2019, and Brunei Darussalam is 2018

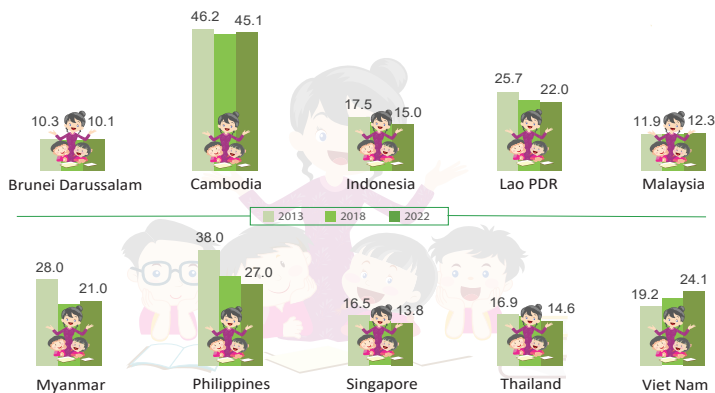
Source: ASEAN Secretariat, ASEANstats database

Pupil-Teacher Ratio in Primary Education

The pupil-teacher ratio, computed as the average number of pupils per teacher, is an indicator used to compare the quality of schooling across countries. It could also indicate the teacher’s workload and human resource allocation in education. The lower pupil-teacher ratio, the more teachers are able to focus on the specific needs of each student, which may improve student performance.

The pupil-teacher ratio in primary education in AMS in 2022 is presented in Figure 1.2.4. Brunei Darussalam had the lowest pupil-teacher ratio in primary education at 10.1, while Cambodia had the greatest ratio at 45.1. In the remaining AMS, the pupil-teacher ratio in primary education ranged from 12.3 to 27.0. Pupil-teacher ratio in Indonesia, Lao PDR, Myanmar, and Thailand decreased over a decade, despite a rise in NER at primary education. Malaysia, on the other hand, posted a decrease in NER in primary education but an increase in pupil-teacher ratio.

Figure 1.2.4. Pupil-teacher ratio in primary education by ASEAN Member States, 2013, 2018 and 2022



Note : The latest available data for Indonesia and Singapore is 2021, Myanmar is 2020
Source: ASEAN Secretariat, ASEANstats database

1.3. HEALTH

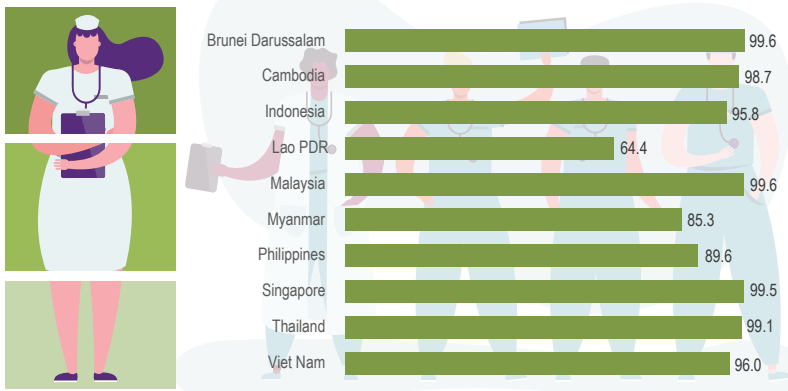
The third goal of the SDGs is to ensure healthy lives and promote well-being for all at all ages. To achieve this goal by 2030, 13 targets have been set which are measured through a number of indicators. This section focuses on the indicators related to the provisions of health care facilities, namely births attended by skilled health personnel and vaccination coverage among the one-year-old population, while some statistics related to mortality were previously addressed in Section 1.1.

Births attended by skilled health personnel

One of the targets under Goal 3 of SDGs is to reduce the global maternal mortality ratio to less than 70 per 100,000 live births. The proportion of births attended by skilled health personnel, defined as the number of births attended by doctor, nurse, midwife or other health professionals providing childbirth care as a percentage of total number of live births in the same period, is one of the indicators used to measure the progress of achieving this target. This indicator evaluates the effectiveness of the health care system in providing adequate childbirth care as well as the utilisation of health services provided. As the time of childbirth is a period with high risk of morbidity and mortality, the presence of skilled health personnel is important for the survival of both mother and newborn. Achieving the target of this indicator will lead to lower maternal and infant mortality and morbidity.

The latest available data on the births attended by skilled health personnel in AMS are presented in Figure 1.3.1. Brunei Darussalam, Malaysia, and Thailand recorded the highest rate with 99.6% of childbirths were attended by skilled health personnel, followed by Singapore (99.5%) and Cambodia (98.7%). In addition, 95.8% of births in Indonesia and 94.7% in Viet Nam were attended by skilled health personnel. In Myanmar, skilled health personnel attended 85.3% of births, while in the Philippines the rate was 89.6%. However, only 64.4% of childbirths in Lao PDR were attended by skilled health personnel.

Figure 1.3.1. Births attended by skilled health personnel (%) by ASEAN Member States, 2022



Note : The latest available data for Brunei Darussalam, Malaysia, and Myanmar is 2021, Lao PDR is 2018
Source : ASEAN Secretariat, ASEANstats database

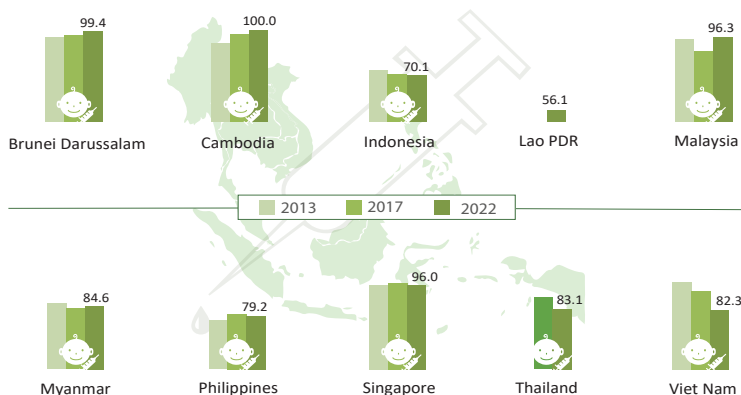
Immunisation Against Measles

The proportion of targeted population covered by all vaccines included in the national program is one of the indicators used to measure the progress toward achieving the Goal 3 of SDGs. Vaccination of one-year-old children is one of the most cost-effective public health interventions for reducing child mortality and morbidity associated with infectious diseases such as diphtheria, tetanus, pertussis and measles.

The coverage of immunisation against measles among children aged one is defined as the percentage of children aged one-year who have received at least one dose of measles-containing vaccine in a given year. Figure 1.3.2 illustrates the disparity in measles vaccination coverage among AMS over the past decade. Cambodia has achieved the target to provide measles vaccination to all children aged one year in 2020. Brunei Darussalam managed well with 99.4% of children aged one year have received their measles vaccines, while in Malaysia and Singapore the rates reached 96.3%

and 96.0%, respectively. Figure 1.3.2 also indicates that declines in coverage were observed in some AMS, with Viet Nam witnessing the biggest decline from 97.7% in 2013 to 82.3% in 2020, followed by Indonesia from 77.9% in 2013 to 70.1% in 2022. Lao PDR recorded the lowest immunisation level, with only 56.1% of one-year old children receiving measles vaccination.

Figure 1.3.2. Coverage of immunisation against measles among one-year old children (%) by ASEAN Member States, 2013, 2017 and 2022



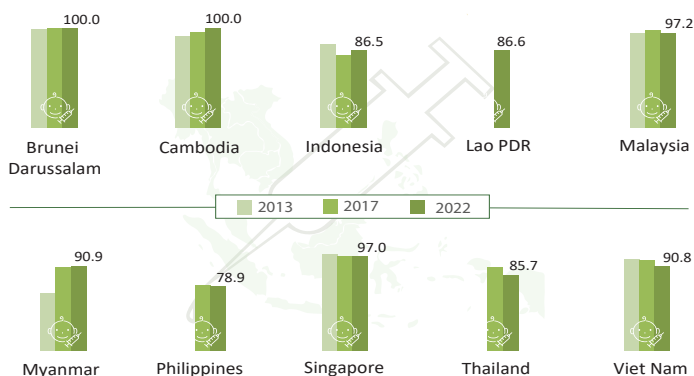
Note : The latest available data for Brunei Darussalam and Lao PDR is 2021, Cambodia and Viet Nam is 2020, Myanmar is 2019

Source : ASEAN Secretariat, ASEANstats database

Immunisation Against DPT

Figure 1.3.3 demonstrates that over the last decade all AMS have performed well and recorded high coverage of immunisation against diphtheria, pertussis, and tetanus (DPT) among one-year old children. The highest coverage was recorded in Brunei Darussalam and Cambodia where all children have received DPT immunisation. Malaysia and Singapore are steadily progressing towards meeting the target, with a current rate of 97.2% for Malaysia and 97.0% for Singapore. Similar to measles vaccination, lower DPT immunisation coverage has been observed in some AMS in the recent years compared to the coverage reported in 2013.

Figure 1.3.3. Coverage of immunisation against DPT among one-year old children (%), ASEAN countries, 2013, 2017 and 2022



Note : The latest available data for Brunei Darussalam and Lao PDR is 2021, Cambodia and Viet Nam is 2020, Myanmar is 2019

Source : ASEAN Secretariat, ASEANstats database

1.4. LABOUR

A growing population with a significant and continued decline in the fertility rate would lead to an increase in the concentration of population in working-age. Provided that jobs are available, the increasing working-age population is expected to support economic growth and productivity. By 2030, the global sustainable development agenda aims to achieve full and productive employment and decent work for all. Labour statistics are crucial for policy formulation and evaluation, as well as monitoring progress towards this goal. This section discusses the overview of selected labour statistics in ASEAN, namely labour force participation rate, unemployment rate, and employment by economic activity.

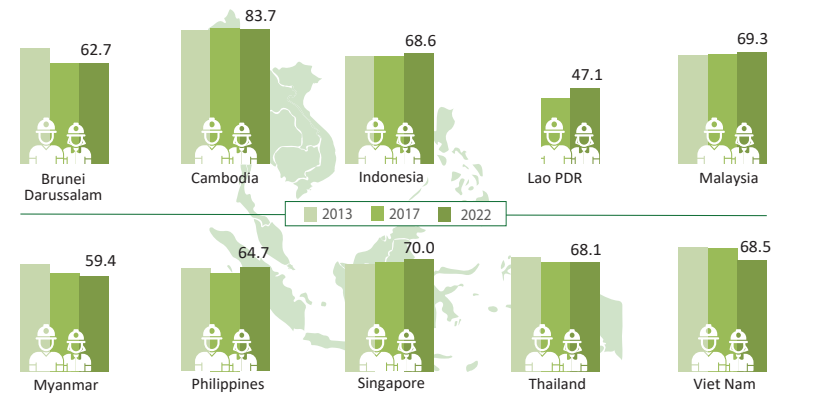
Labour Force Participation Rate

Labour force participation rate (LFPR) is commonly used to monitor the active workforce of countries. The LFPR measures the share of a country's

working-age population who are engaged actively in labour market, either by working or looking for work. It indicates the size of supply of labour available to be utilised in the production of goods and services, relative to population at working age (ILO, 2016).

Figure 1.4.1 a presents the latest available data on the LFPRs of AMS in the last ten years. Cambodia had the highest LFPR rate in the region at 83.7%, followed by Singapore at 70.0%. In 2022, Lao PDR had the lowest rate at 47.1%, but it was higher than their rate in 2017. Four out of ten AMS observed a decline in their LPPRs, with Brunei Darussalam and Viet Nam experienced the largest decreases, from 72.2% in 2012 to 62.7% in 2022 and from 77.6% in 2013 to 68.5% in 2022, respectively. Similarly, Myanmar and Thailand also experienced a decline, but at a slower rate, with Myanmar decreasing by 7.5 percentage points and Thailand by 3.0 percentage points.

Figure 1.4.1a. Labour force participation rates (%) by ASEAN Member States, 2013, 2017, and 2022

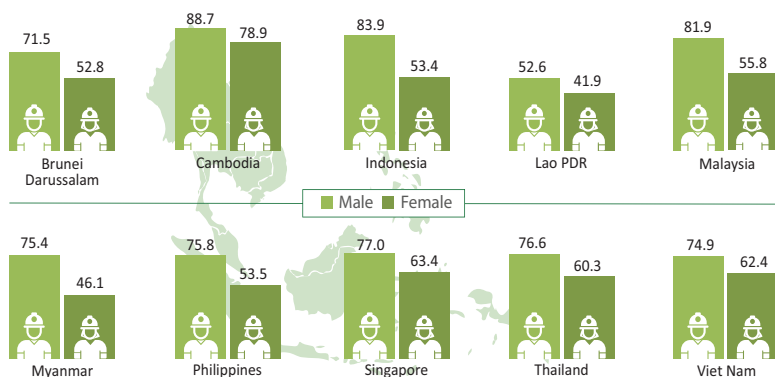


Note : The latest available data for Myanmar is 2019
Source : ASEAN Secretariat, ASEANstats database

Figure 1.4.1b depicts the LFPRs of AMS in 2022 and indicates that the participation rate of females was lower than that of males across all AMS.

The highest disparity in LFPR was observed in Indonesia at 83.9% for males compared to 53.4% for females, followed by Myanmar at 75.4% and 46.1% for males and females, respectively. In addition, high disparities were also found in Malaysia and the Philippines, with the LFPRs for males at 81.9% and 75.8% and for females at 55.8% and 53.5%, respectively. Cambodia recorded the highest LFPRs for both males and females at 88.7% and 78.9%, respectively, whereas the lowest rates were observed in Lao PDR at 52.6% and 41.9%, respectively.

Figure 1.4.1b. Labour force participation rates (%) by sex by ASEAN Member States, 2022



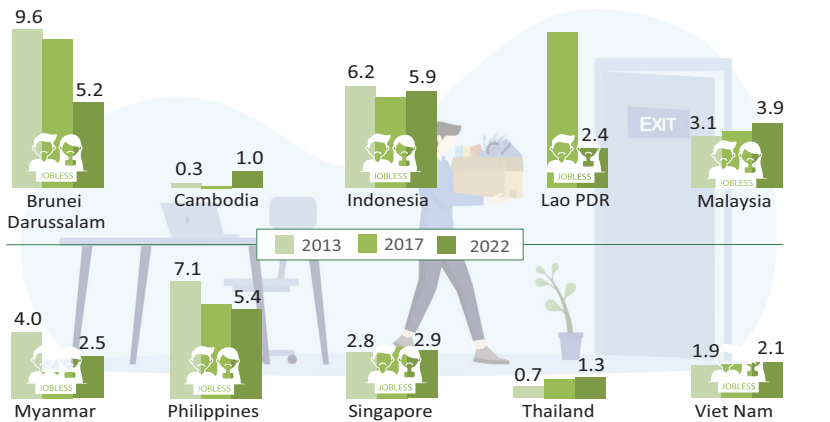
Note : The latest available data for Myanmar is 2019
Source: ASEAN Secretariat, ASEANstats database

Unemployment Rate

Unemployment rate is a key economic indicator commonly used by policymakers to assess the economic condition of the country. This indicator indicates the under-utilisation of labour supply and inability of working age population to find employment. Unemployment rate is defined as the number of unemployed people as a percentage of the labour force, reflecting the proportion of the labour force that does not have a job but is available and actively looking for work.

Figure 1.4.2 demonstrates that unemployment rates in AMS were relatively low but tended to fluctuate over the last decade. Some AMS succeeded in reducing the unemployment rate after experiencing an increase due to the disruption of the economy during the COVID-19 pandemic. In 2022, Cambodia recorded the lowest unemployment rate at 1.0%, followed by Thailand at 1.3%, while Indonesia had the highest unemployment rate at 5.9%, followed by the Philippines and Brunei Darussalam with unemployment rate of 5.4% and 5.2%, respectively. Unemployment rate in the remaining AMS ranged from 2.1% to 3.9%.

Figure 1.4.2 Unemployment rates (%) by ASEAN Member States, 2013, 2017 and 2022



Source : ASEAN Secretariat, ASEANstats database

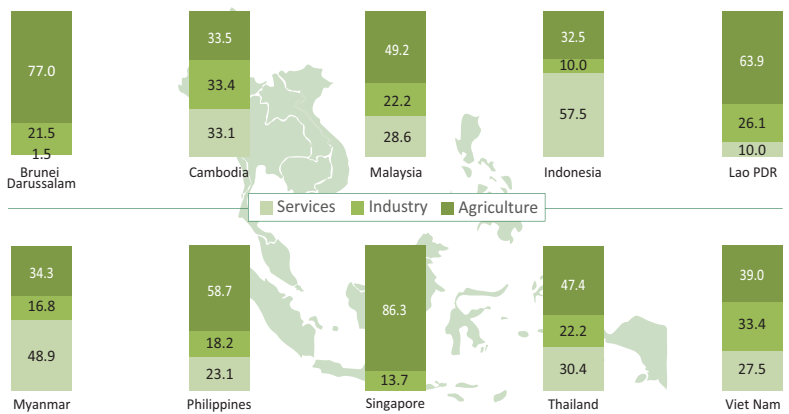
Employment by Economic Activity

The classification of economic activity is based on the International Standard of Industrial Classification (ISIC) and refers to the primary activity of the establishment in which an individual is involved during the reference period. In this section, economic activity is aggregated into three (3) broad categories namely agriculture, industry, and services. Agriculture includes crops, animal

production, forestry and fishing. Industry covers manufacturing, construction, mining and quarrying, electricity, gas and water supply. Services comprise market services (trade, transportation, accommodation and food, and business and administrative services) as well as non-market services (public administration, community, social and other services and activities).

Figure 1.4.3 describes that the largest sector in term of employment in the majority of AMS was services, except in Lao PDR and Myanmar. Agriculture activity still dominated employment structure in Myanmar (48.9%) and Lao PDR (57.5%). Singapore recorded the highest share of employment in services activities at 86.3%, followed by Brunei Darussalam (77.0%) and Malaysia (63.9%). Cambodia reported a relatively similar share among these 3 economic activities with 33.1% in agriculture, 33.4% in industry, and 33.5% in services. Brunei Darussalam reported the share of employment in agriculture at 1.5%, indicating minimal activities in this sector. Lao PDR had the lowest rate of employment in industrial activities at 10.0%, followed by Singapore at 13.7%.

Figure 1.4.3. Shares of employment by economic activity (%) by ASEAN Member States, 2022



Note : The latest available data for Cambodia and Myanmar is 2019
Source: ASEAN Secretariat, ASEANstats database

1.5. POVERTY AND INEQUALITY

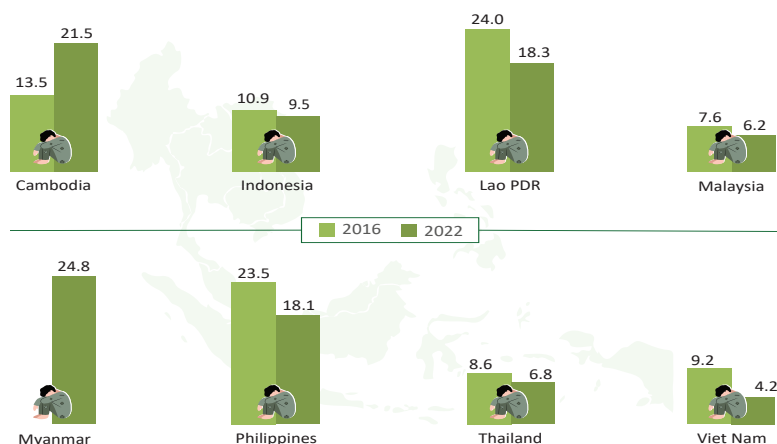
The 2030 agenda for sustainable development aims to end poverty in all its forms everywhere (Goal 1) and to reduce inequality within and among countries (Goal 10). Progress towards these goals can be monitored, among others, by examining the extent to which AMS reduces the incidence of poverty as well as income inequality. Poverty is defined as the inability to meet a minimum standard of living, whereas inequality refers to disparities in a broad range of areas, which include not only income and wealth, but also education, health and nutrition, among others. This section discusses national poverty as measured by proportion of population living below the national poverty line and inequality as measured by gini ratio in AMS.

Poverty

The national poverty rate is defined as the percentage of total population living below the national poverty line. A national poverty line is the minimum level of income considered adequate to live in a particular country. The national poverty line is used to better estimate poverty rates by taking into account the economic and social conditions of each country.

The latest available data indicates that the majority of AMS experienced a decline in their poverty incidence (Figure 1.5.1). Lao PDR and the Philippines witnessed a significant decrease in their poverty rates, dropping from 24.0% to 18.3% in 2018, and from 23.5% in 2016 to 18.1% in 2021, respectively. Significant decline was also recorded by Viet Nam with the poverty rate stood at 4.2% in 2022. Likewise, Indonesia and Thailand also recorded a decline in their poverty rates, reaching 9.5% (2022) and 6.8% (2020), respectively. On the other hand, the national poverty rate in Cambodia increased from 13.5% in 2016 to 21.5% in 2021. Myanmar had the highest poverty rate among AMS, reported at 24.8% in 2017.

Figure 1.5.1. Population living below the national poverty lines (%) by ASEAN Member States, 2016 and 2022



- Notes :
1. The indicator is not applicable to Brunei Darussalam and Singapore
 2. The latest available data for Cambodia and the Philippines is 2021, Thailand is 2020, Lao PDR is 2018, Myanmar is 2017
 3. The data for Malaysia refer to proportion of households living below the national poverty line, while for Viet Nam, the data refer to proportion of households living below the national multidimensional poverty rate

Source : ASEAN Secretariat, ASEANstats database

Income inequality

Income inequality refers to the uneven distribution of income between individuals or households in a given country. The gini coefficient (ratio) is commonly used to measure the degree of income inequality. A gini ratio of 0 represents perfect equality, while a ratio of 1 implies perfect inequality.

Figure 1.5.2 presents the gini ratio of AMS from 2005 to 2021, highlighting the improvement of income equality in the majority of AMS. Thailand successfully reduced its gini ratio down from 0.49 in 2010 to 0.43 in 2021. Similarly, Viet Nam and Cambodia also made significant progress, with a

decrease in their gini ratio from 0.43 in 2010 to 0.38 in 2022 and from 0.34 in 2010 to 0.29 in 2017, respectively. Thailand, Malaysia and Singapore also recorded a reduction in their income inequality, albeit at a slower pace. Furthermore, the Philippines and Singapore reported the highest level of income inequality, as indicated by their gini ratio of 0.44 in recent years, which, however, was lower compared to the previous period.

Figure 1.5.2. Gini ratio by ASEAN Member States, 2005, 2010, and 2022



Notes : 1. The latest available data for the Philippines and Thailand is 2021, Cambodia and Myanmar is 2017, Lao PDR is 2013
 2. The data for Myanmar prior to 2015 is not available
 3. The data for Brunei Darussalam is not available
 Source : ASEAN Secretariat, ASEANstats database



2

ECONOMY



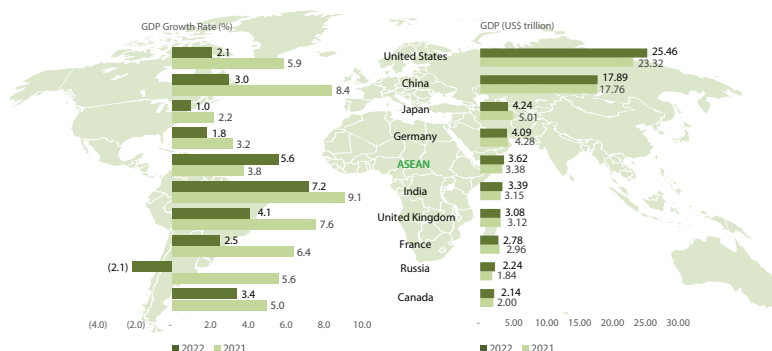


ECONOMY

2.1 ECONOMIC SIZE AND GROWTH

In 2022 the world's economy was gradually recovering from COVID-19 with an increase of 3.5% in real terms, following a significant rebound of 6.3% the previous year³. In the case of ASEAN, its growth accelerated from 3.4% in 2021 to 5.6% in 2022. The world nominal GDP reached around US\$100 trillion in 2022, marking a twofold increase from 2006 (US\$51 trillion). With the combined nominal GDP of ten AMS reaching US\$3.6 trillion in 2022, ASEAN was the fifth largest economy in the world following the United States (US\$25.5 trillion), China (US\$17.9 trillion), Japan (US\$4.2 trillion), and Germany (US\$4.1 trillion). Collectively, ASEAN and the aforementioned four countries represented more than half of the global economy, with ASEAN's contributing around 3.6% of the world GDP.

Figure 2.1.1. GDP (US\$ trillion) and growth rate (%) of the top ten largest economies, 2021-2022

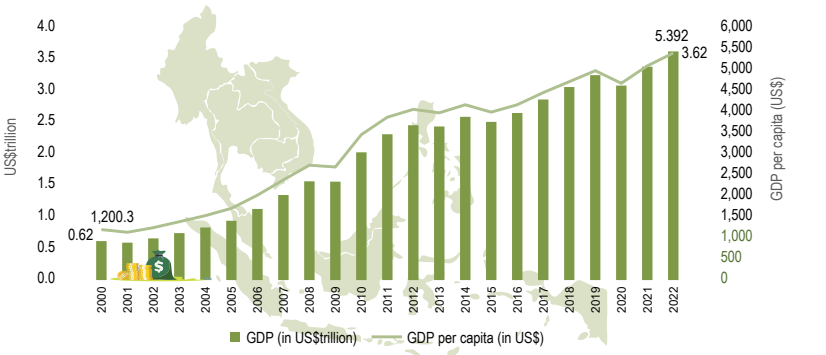


Source: ASEAN Secretariat, ASEANstats database

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Figure 2.1.2 shows that both ASEAN's GDP and GDP per capita recorded a positive trend upward throughout the period of 2005–2022, with the 2021–2022 figures exceeding the pre-pandemic level.

Figure 2.1.2. ASEAN GDP (US\$ trillion) and GDP per capita (US\$), 2000-2022



Source: ASEAN Secretariat, ASEANstats database

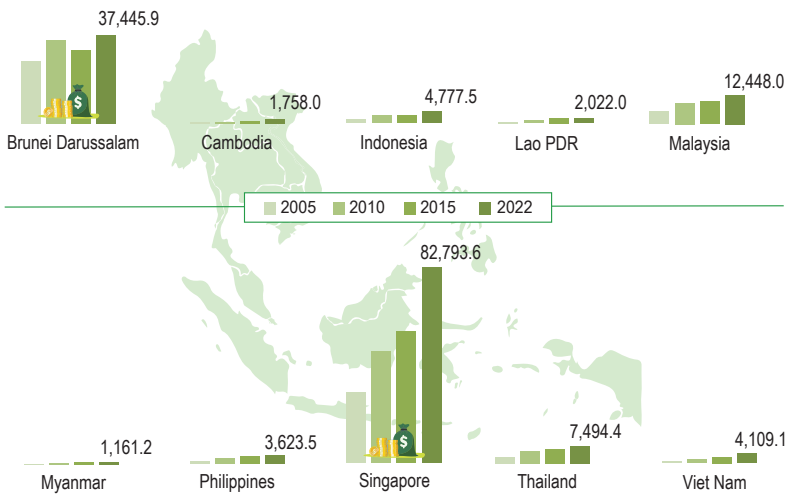
Figure 2.1.3. Shares of ASEAN Member States GDP to total ASEAN (%), 2005 and 2022



Source: ASEAN Secretariat, ASEANstats database

The ASEAN GDP comprises the ten AMS with varied economic size (Figure 2.1.3). In 2022, Indonesia maintained the largest share of the region's GDP at 36.4%, followed by Thailand (13.7%), Singapore (12.9%), Viet Nam (11.3%), Malaysia and the Philippines (both at 11.2%), while the remaining AMS contributed 3.4% to the GDP, resulting in a total of US\$3.6 trillion of ASEAN GDP. Indonesia and Viet Nam had shown significant increases in their contributions to the ASEAN GDP since 2005.

Figure 2.1.4. GDP per capita (US\$) by ASEAN Member States, 2005-2022



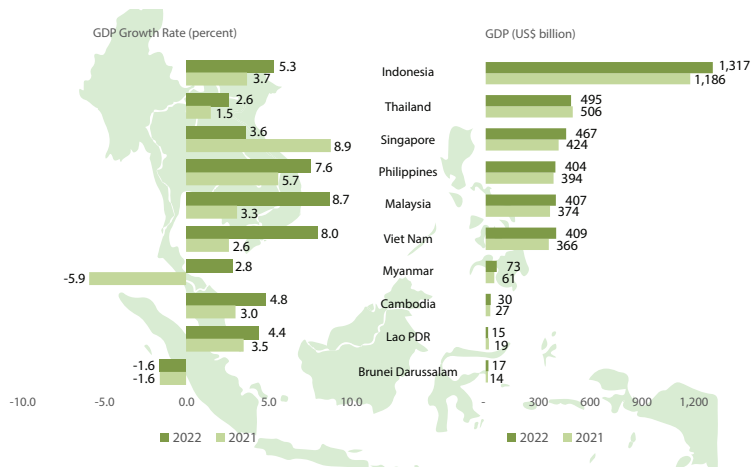
Source: ASEAN Secretariat, ASEANstats database

GDP per capita (GDP of an economy divided by its total population) is often used as a proxy of living standard. In 2022, Singapore and Brunei Darussalam recorded the highest GDP per capita among AMS at US\$82,794 and US\$37,446, respectively which was 6.6% and 15.6% higher compared to the previous year (Figure 2.1.4).

GDP Growth

Economic growth is defined by the growth of real GDP or GDP at constant prices, which is a year-on-year comparison of the value of all goods and services produced in an economy expressed in base-year prices. Malaysia, Viet Nam and the Philippines experienced the highest GDP growth rates in 2022 with 8.7%, 8.0%, and 7.6%, respectively, continuing the rebound in 2021, with growth rates of 3.3%, 2.6%, and 5.7%, respectively (Figure 2.1.5). Meanwhile, Brunei Darussalam still experienced a contraction by 1.6% in 2022 due to the dropped in oil and gas mining (-6.0%) and manufacturing of LNG and petroleum (-3.8%). These industries contributed to more than half of the economy⁴. While some economies were gradually recovering, the majority of them experienced higher growth rate in 2022 than the previous year, except for Singapore which experience slower growth in 2022.

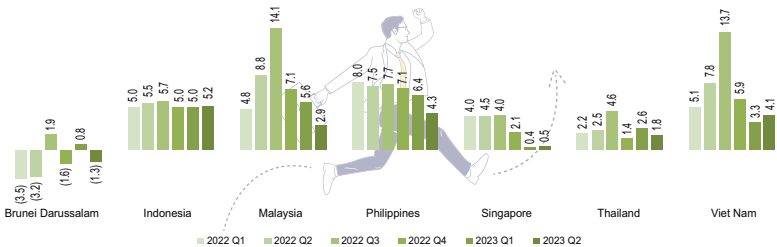
Figure 2.1.5. ASEAN GDP at current prices (US\$ billion) and growth rate (%), 2021-2022 by ASEAN Member States, 2021-2022



Source: ASEAN Secretariat, ASEANstats database

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Figure 2.1.6. Quarterly GDP growth rate (%) of seven ASEAN Member States, Q1-2022 to Q2-2023



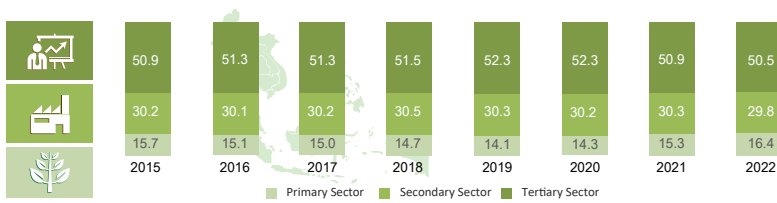
Source: ASEAN Secretariat, ASEANstats database

Figure 2.1.6 presents the latest quarterly GDP growth rate of seven AMS. Most AMS recorded relatively high growth starting in the second quarter of 2022. Afterwards, the rate of growth was relatively stable.

GDP by Main Economic Sectors

The economy, in general, could be divided into three main sectors, namely primary, secondary, and tertiary. Primary sector includes agriculture industry and mining & quarrying industry, secondary sector includes manufacturing industry, electricity, gas and water supply industry, and construction industry, while tertiary sector includes services industries. The decomposition of GDP by these main sectors could indicate the economic structure of the country and the contribution of each sector to the economy.

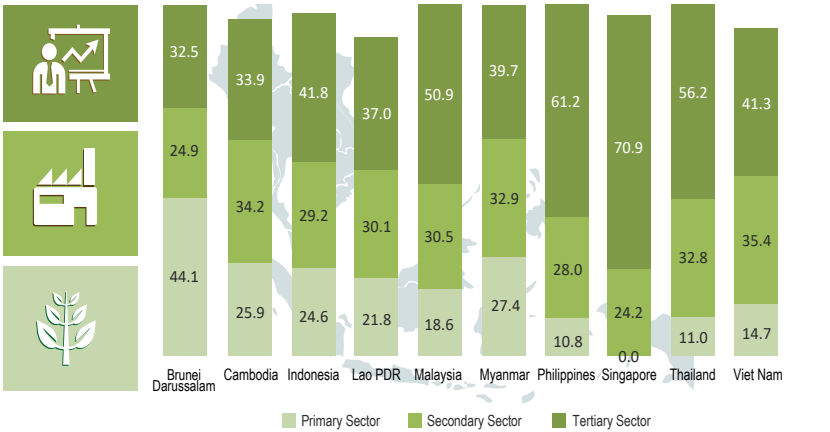
Figure 2.1.7. Shares of main economic sectors to total GDP (%), 2015-2022



Source: ASEAN Secretariat, ASEANstats database

In the last decade, tertiary sector consistently became the leading sector in ASEAN's economy (Figure 2.1.7). The share of primary sector to the region's GDP increased from 15.7% in 2015 to 16.4% in 2022. On the contrary, the shares of the other two sectors decreased during the same period. The share of secondary sector decreased from 30.2% in 2015 to 29.8% in 2022. Meanwhile, tertiary sector contributed 50.5% of total GDP in 2022, a slight decrease from 50.9% in 2015. Economic structures also differed across AMS although in 2022 tertiary sector remained as the leading sector in all AMS (Figure 2.1.8). The share of the tertiary sector was found to be the largest in the Philippines and Singapore reaching 70.9% and 61.2%, respectively, of the country's total GDP, followed by Thailand (56.2%), Malaysia (50.9%), Indonesia (41.8%), and Viet Nam (41.3%). Meanwhile, primary sector was the leading sector in Brunei Darussalam, contributing 44.1% to total GDP of the country. Primary sector is also considered as an important sector for Myanmar (27.4%), Cambodia (25.9%), Indonesia (24.6%), Lao PDR (21.8%), Malaysia (18.6%) and Viet Nam (14.7%).

Figure 2.1.8. Shares of main economic sectors to total GDP (%) by ASEAN Member States, 2022



Source: ASEAN Secretariat, ASEANstats database

2.2 INTERNATIONAL MERCHANDISE TRADE

The total value of ASEAN international merchandise trade in 2022 increased by 14.9% reaching US\$3,846 billion, consisting of US\$1,962 billion of exports and US\$1,884 billion of imports (Figure 2.2.1). It indicates a continuing steady recovery beginning with a rebound of 25.4% in 2021. However, the shares of trade among AMS (intra-ASEAN) to total ASEAN trade has not returned to the pre-pandemic level in 2019 (22.5%).

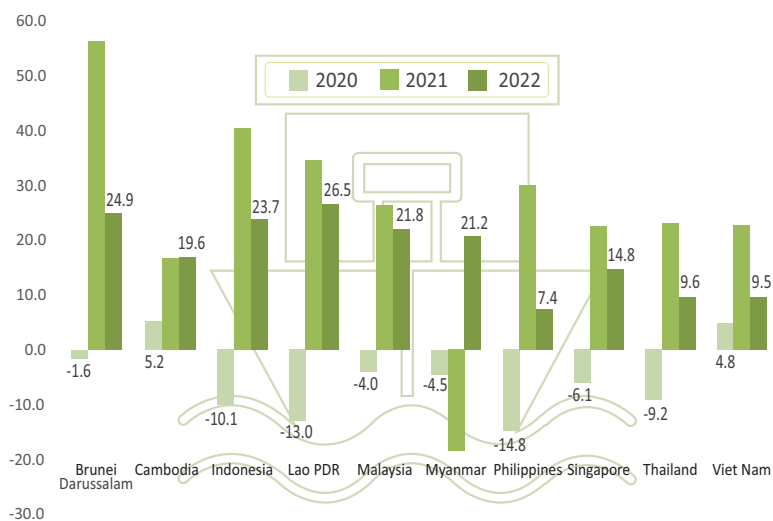
Since 2005, ASEAN has consistently maintained a surplus in its merchandise trade balances, including in 2022, with a trade balance of US\$78.1 billion, which was lower than in 2020 and 2021. Malaysia recorded the highest trade balance with US\$58.9 billion, followed by Indonesia with US\$54.5 billion.

Figure 2.2.1. ASEAN merchandise exports and imports and trade balance (US\$ billion), 2005-2022



Source: ASEAN Secretariat, ASEANstats database

Figure 2.2.2. Merchandise trade growth rate (%) by ASEAN Member States, 2020-2022

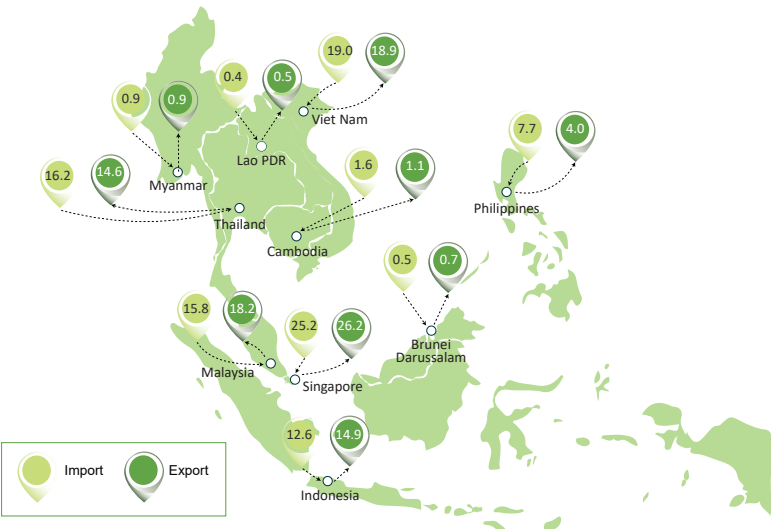


Source: ASEAN Secretariat, ASEANstats database

Figure 2.2.2 shows that ASEAN imports grew by 15.8% in 2022, exceeding the growth rate of its exports that increased only by 14.1%. Lao PDR had the highest growth rate at 26.5%, followed by Indonesia, Malaysia, and Myanmar at 23.7%, 21.8%, and 21.2%, respectively. The remaining AMS also experienced growth in total trade, ranging from 7.4% to 19.6%.

Singapore maintained its role as the largest contributor to ASEAN merchandise trade in 2022, with shares of exports and imports recorded at 26.2% and 25.2%, respectively (Figure 2.2.3). The next five largest contributors in the region, namely Viet Nam, Malaysia, Thailand, Indonesia, and the Philippines, collectively accounted for 71.0% of total ASEAN trade. The remaining 3.3% was contributed by Brunei Darussalam, Cambodia, Myanmar, and Lao PDR.

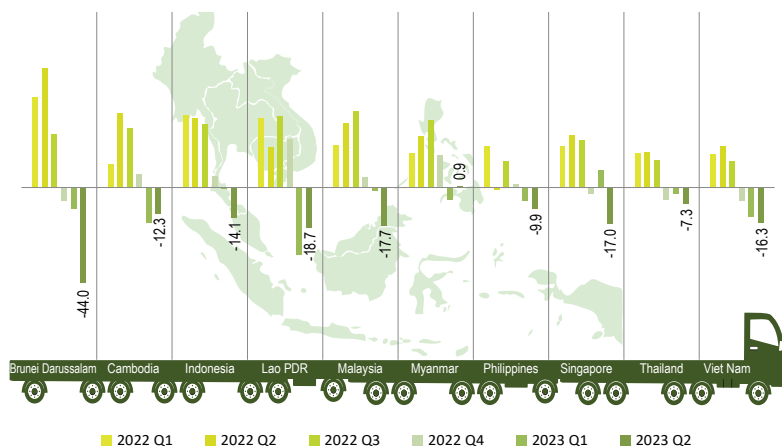
Figure 2.2.3. Shares of merchandise trade (%) by ASEAN Member States, 2022



Source: ASEAN Secretariat, ASEANstats database

The positive story of 2022 does not seems to be repeated in 2023. In the first half of 2023, ASEAN merchandise trade declined by 8.7%, in contrast to significant 20.9% increase recorded in the same period of 2022 (Figure 2.2.4). The breakdown of the 1st quarter and 2nd quarter of 2023 shows that ASEAN trade declined in both quarters, by 2.1% and 14.7%, respectively. The majority of ASEAN Member States experienced contraction in total trade in both quarters, except for Singapore with 8.2% growth rate in 1st quarter and Myanmar which recorded positive growth of 0.9% in the 2nd quarter following a 5.7% decline in the 1st quarter. Although ASEAN exports maintained positive growth at 2.0% in the 1st quarter of 2023, they declined by 13.7% in the 2nd quarter. Meanwhile, ASEAN imports contracted in both quarters at 6.4% and 15.6%, respectively. However, the ASEAN trade balance maintained a surplus in both quarters and surpassed the corresponding period of last year.

Figure 2.2.4. Merchandise trade growth rate (%) by ASEAN Member States, 2022 – 2nd Quarter 2023

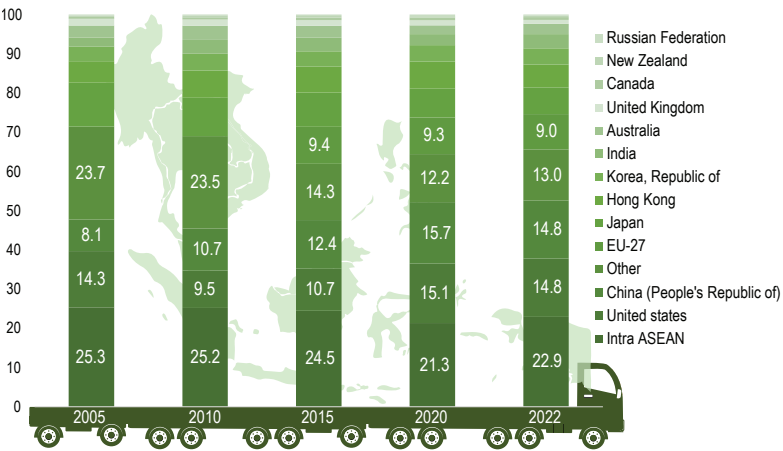


Source: ASEAN Secretariat, ASEANstats database

In 2022, intra-ASEAN trade continued to hold the largest share of ASEAN total trade, contributing 22.4% to the region's total merchandise trade. The contribution of intra-ASEAN exports and imports were 22.9% and 21.6%, respectively (Figure 2.2.5 and 2.2.6). This figure was slightly higher compared to 2020 where intra-ASEAN's share to the region's total trade was 21.2% but lower than the pre-pandemic level (22.5%) in 2019. The shares of ASEAN's main trading partners slightly declined in 2022 compared to the previous year, except for Australia (from 2.5% in 2021 to 2.6% in 2022) and Republic of Korea (from 5.7% in 2021 to 5.8% in 2022).

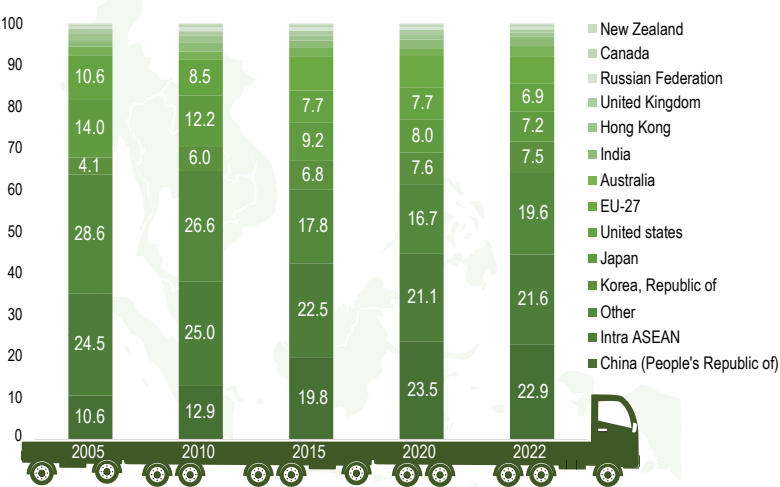
China and the United States were the two largest external markets for ASEAN exports, each with a 14.8%, followed by EU-27 (9%) and Japan (6.8%). As for imports (Figure 2.2.6.), China was also the region's most important partner with a share of 22.9%, followed by Republic of Korea (7.5%) and Japan (7.2%).

Figure 2.2.5. Shares of merchandise exports (%) by trading partners, 2005-2022



Source: ASEAN Secretariat, ASEANstats database

Figure 2.2.6. Shares of merchandise imports (%) by trading partners, 2005-2022

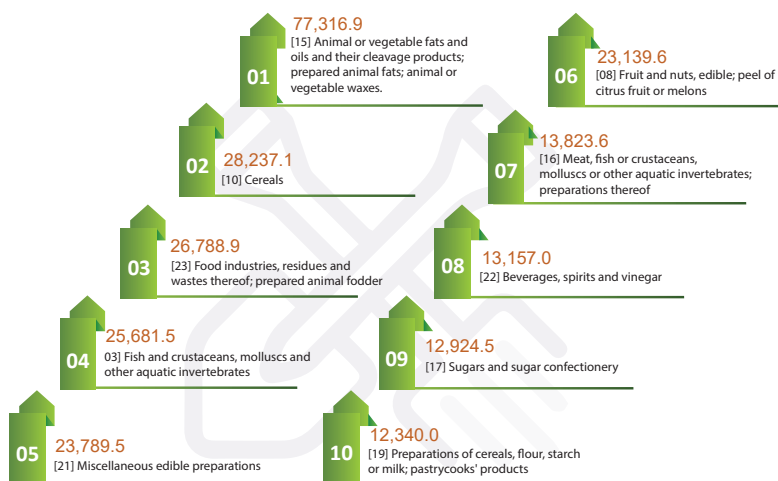


Source: ASEAN Secretariat, ASEANstats database

The agriculture⁵ sector plays a significant role in merchandise trade of some AMS. In 2022, trade in agricultural products increased by 11.3%, slower than the growth in previous year (22.4%). In 2020, amidst the COVID-19 outbreak, the total agriculture trade recorded a positive growth of 2.6%, while other commodity groups experienced contraction.

In 2022, the ASEAN agriculture trade was recorded at US\$341 billion. Animal and vegetable fat [HS15] amounted to US\$77.3 billion, followed by cereals [HS10] at US\$28.2 billion. Their contributions to total ASEAN agriculture trade were 22.7% and 8.3%, respectively (Figure 2.2.7).

Figure 2.2.7. Top-10 ASEAN merchandise trade of agriculture commodities (US\$ million), 2022



Source: ASEAN Secretariat, ASEANstats database

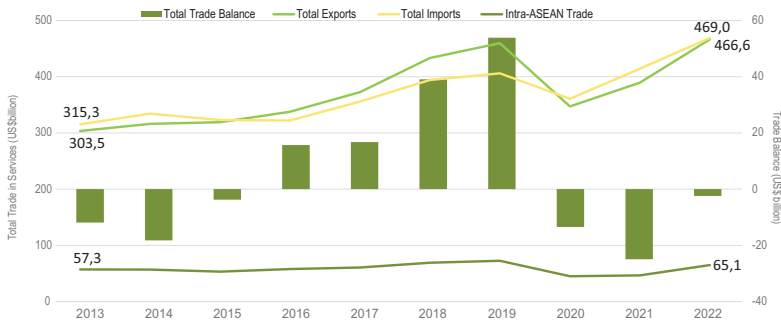
5 FAO classifies agriculture commodities by referring to Harmonized System [HS] codes 01 to 24

2.3. INTERNATIONAL TRADE IN SERVICES

Over the past decade, the growth of trade in services in the ASEAN region has shown significant progress (Figure 2.3.1). The value of trade in services had witnessed a significant rise, reaching its peak in 2019 with a total value of US\$865.8 billion. ASEAN's total trade in services contracted by 18.2% at the onset of the pandemic in 2020, but rebounded, showing a positive trajectory in the last two years. It grew by 13.5% in 2021, amounting to US\$803.6 billion, and further increased by 16.4% in 2022, reaching US\$935.6 billion, surpassing the pre-pandemic level in 2019.

After a few years as a net exporter, ASEAN returned to be a net importer in 2020, as depicted in Figure 2.3.1. The services trade deficit widened in 2021 as imports increased by 14.9% while exports rose by only 12.1%. In 2022, the exports of services increased significantly, with a growth rate of 19.8%, reaching US\$466.6 billion. On the other hand, the imports of services also recorded an increase, albeit at a slightly lower rate of 13.2%, reaching US\$469.0 billion. As a result, the services trade deficit declined from US\$24.9 billion in 2021 to US\$2.4 billion in 2022.

Figure 2.3.1. ASEAN exports and imports of services and trade balance (US\$ billion), 2013-2022

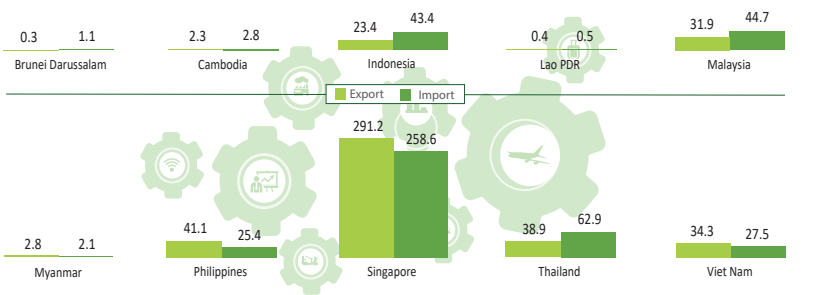


Source: ASEAN Secretariat, ASEANstats database

Figure 2.3.1 also shows a similar trend in the value of services traded among AMS from 2013 to 2022. After experiencing significant growth, with a threefold increase and a peak in 2019, the intra-ASEAN trade in services experienced a downturn in 2020 and 2021 during the COVID-19 pandemic. In 2022, the value of intra-ASEAN services trade increased significantly, reaching around US\$65 billion, but remained below the pre-pandemic level observed in 2019, which was around US\$70 billion. Intra-ASEAN services trade in 2022 accounted for around 13% of ASEAN's total trade in services, an increase from around 11% in 2021.

Figure 2.3.2 presents the value of services exported and imported by AMS in 2022, with all AMS showing a strong recovery indicated by a significant growth in total trade in services. Singapore continued to have the largest total trade in services with US\$549.8 billion, accounting for 58.8% of the region total, followed by Thailand (US\$101.8 billion, 10.9%) and Malaysia (US\$76.6 billion, 8.2%). Meanwhile, Indonesia and the Philippines both had total trade in services of US\$66.8 billion and US\$66.5 billion, respectively, contributing about 7.1% each of the ASEAN trade in services. Furthermore, Myanmar, the Philippines, Singapore, and Viet Nam had a positive trade balance, whereas the rest of AMS experienced negative trade balances.

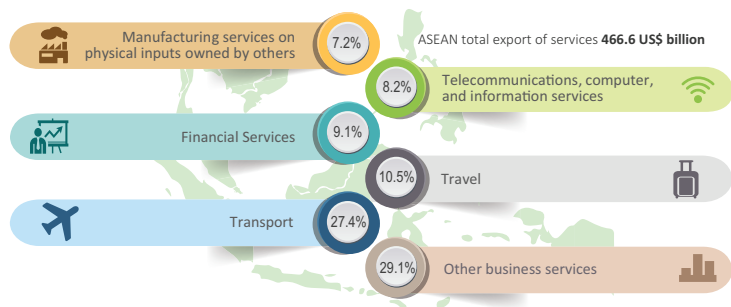
Figure 2.3.2. Exports and imports of services (US\$ billion) by ASEAN Member States, 2022



Source: ASEAN Secretariat, ASEANstats database

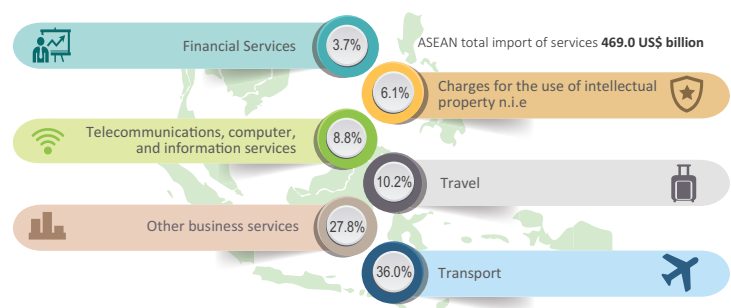
In 2022, the top three categories for ASEAN trade in services were other business services, transport services, and travel services. These three service categories accounted for 67.1% of ASEAN's export of services (Figure 2.3.3a) and 74.0% of ASEAN's import of services (Figure 2.3.3b). With the reopening of the border and the recovery of the tourism industry, travel had re-emerged as one of the major services traded in ASEAN. Similar trend was observed in intra-ASEAN services trade, with other business services, transport services, and travel services accounted for 66.8% of the total.

Figure 2.3.3a. Shares of ASEAN exports of services by broad headings (%), 2022



Source: ASEAN Secretariat, ASEANstats database

Figure 2.3.3b. Shares of ASEAN imports of services by broad headings (%), 2022



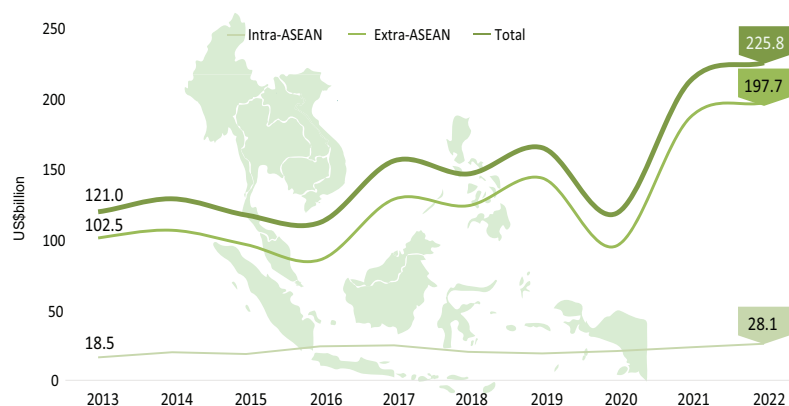
Source: ASEAN Secretariat, ASEANstats database

2.4. FOREIGN DIRECT INVESTMENTS

The inward foreign direct investment (FDI) flows into the ASEAN region had increased steadily over the past decade, despite a decline in 2016 due to the financial crisis and another fall in 2020 due to the COVID-19 pandemic as presented in Figure 2.4.1. Following a robust rebound in 2021, ASEAN remained an attractive hub for investment in 2022, attracting US\$225.8 billion in FDI, a 6.0% increase compared to 2021. This growth underscores the resilience of the region despite the 12% decline of global FDI in 2022.

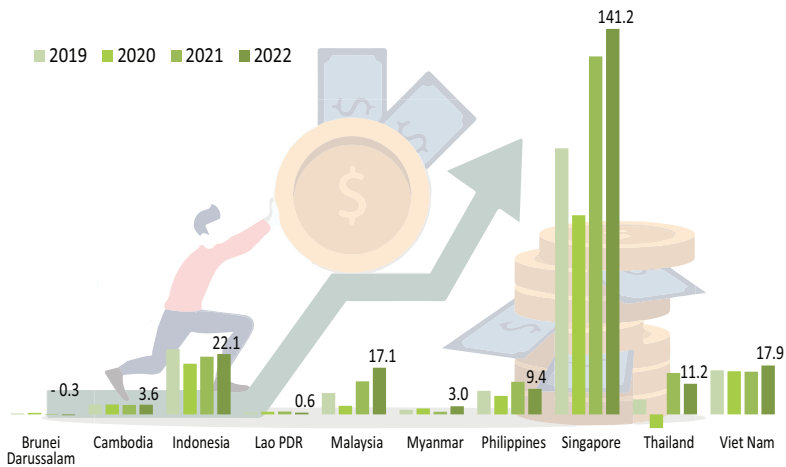
The value of intra-ASEAN inward FDI flows has also remained relatively steady over the past decade, even in the midst of the COVID-19 pandemic, with significant increases over the past three years. In 2021, intra-ASEAN FDI rose by 11.6% to US\$25.6 billion from US\$22.9 billion in 2020 and further increased by 9.8% to US\$28.1 billion in 2022. However, the share of intra-ASEAN FDI to total ASEAN inward FDI flows fell from 19.1% in 2020 to 12.0% in 2021 and slightly increased to 12.4% in 2022.

Figure 2.4.1. Inward FDI flows, extra and intra-ASEAN (US\$ billion), 2013-2022



Source: ASEAN Secretariat, ASEANstats database

Figure 2.4.2. Inward FDI flows (US\$ billion) by ASEAN Member States, 2019-2022



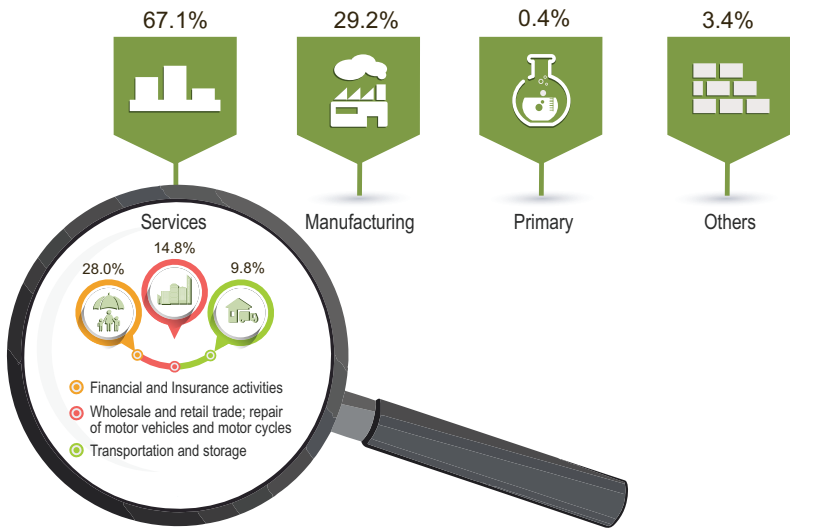
Source: ASEAN Secretariat, ASEANstats database

Figure 2.4.2. shows that Singapore has been the top recipient of inward FDI flows in the region throughout the period of 2013-2022. In 2022, Singapore attracted US\$141.2 billion of FDI, accounting for more than half of total FDI inward flows to ASEAN, followed by Indonesia (9.8%), Viet Nam (7.9%) and Malaysia (7.6%). In terms of growth, Myanmar recorded the highest growth with almost threefold increase in 2022, followed by Malaysia (40.8%) and Viet Nam (14.3%). Additionally, Singapore, Indonesia, and Cambodia grew by 7.7%, 4.7%, and 2.7%, respectively. In contrast, Brunei Darussalam experienced the biggest drop, with a decline of over 200%, followed by Lao PDR (40.7%), Thailand (26.0%), and the Philippines (21.8%).

Figure 2.4.3. depicts the region’s inward FDI flows by economic activity in 2022 where services activities had the largest share, which accounted for 67.1% of total inward FDI flows in the region. Among the services economic activities, the financial and insurance industry was the main recipient, contributing US\$63.3 billion or 28.0% of total inward FDI flows, followed by wholesale

and retail trade and transportation and storage, with a share of 14.8%, and 9.8%, respectively. Manufacturing was also one of the major recipients with a share of 29.2%. In terms of growth, inward FDI in manufacturing grew by 18.9%, while FDI in services increased by 4.9% in 2022.

Figure 2.4.3. Shares of inward FDI flows by economic activity, 2022

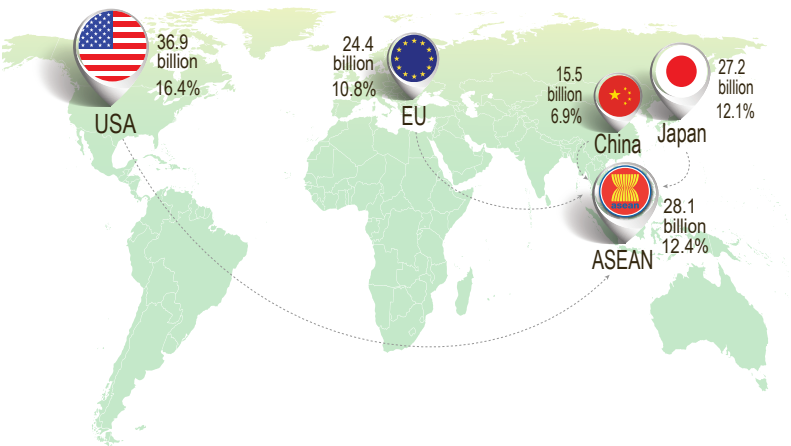


Source: ASEAN Secretariat, ASEANstats database

In 2022, the United States, ASEAN, Japan, the European Union (EU), and China, were the top-5 sources of FDI in the region, with a combined share of 58.5% (Figure 2.4.4). The United States was the top investor with US\$36.9 billion, representing 16.4% of total ASEAN inward FDI flows. Inward FDI originating from the region was the second largest with the share of 12.4%, followed by Japan with an amount of US\$27.2 billion, representing a share of 12.1%. EU and China were also significant sources of FDI to ASEAN, contributing 10.8% and 6.9%, respectively.

FDI flows from major source economies were concentrated in relatively similar economic activities. FDI from the United States and intra-ASEAN primarily went to financial and insurance activities and manufacturing activities. In addition, FDI from China was also significant in manufacturing and real estate activities, while investors from the EU concentrated in wholesale and retail trade as well as in manufacturing activities. Meanwhile, Japan invested strongly in transportation and storage activities.

Figure 2.4.4. ASEAN top-5 FDI sources, 2022



Source: ASEAN Secretariat, ASEANstats database



3

CONNECTIVITY





CONNECTIVITY

INTRODUCTION

Following the adoption of the Master Plan on ASEAN Connectivity 2010 (MPAC 2010), ASEAN further solidify its commitment to strengthen and improve connectivity within the region by adopting the MPAC 2025 in 2016. Recognising the critical role of connectivity in fostering growth and productivity as well as facilitating access to markets and various opportunities, these plans comprehensively address various aspects of connectivity. This includes a focus on physical infrastructure, institutional, and people-to-people linkages. This chapter delves into the physical connectivity and people-to-people linkages of AMS, focusing on indicators related to land and air transport, tourism, and communication.

3.1 TRANSPORT

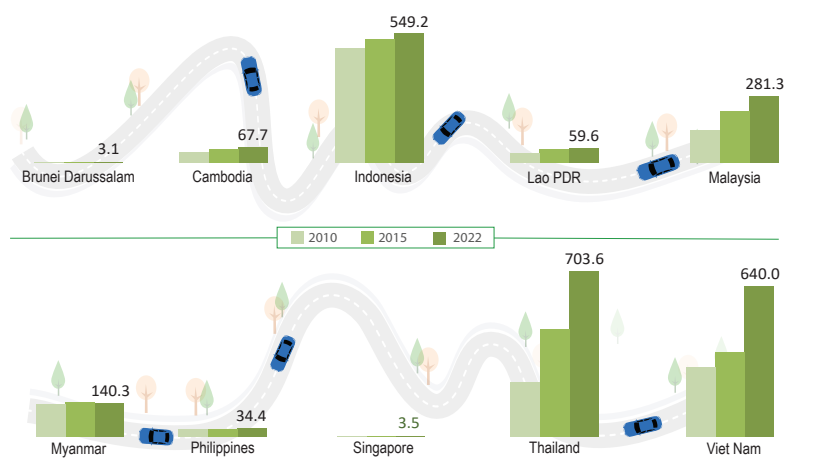
High-quality and efficient transportation is crucial for facilitating trade, reducing costs, and fostering economic integration. An integrated transportation system will enhance the efficiency of transporting products and people within the region. This section will describe the progress of transportation development in ASEAN, particularly the road infrastructure, the number of registered vehicles, air transport indicators related to the number of international and domestic passengers, and international air cargo during 2010–2022.

Land transport

The total road length, a key measure of land connectivity, is defined as the total kilometer length of all roads in the country in a given year, including all existing road types except dedicated cycle paths. The total road length

in ASEAN displayed significant improvement in 2022, registering a notable 76.4% increase compared to 2010, equivalent to a 5.4% growth per annum (Figure 3.1.1). During the period of 2010-2022, substantial increase of road length were observed in Thailand (206.7%), Viet Nam (116.9%), Malaysia (105.0%), Lao PDR (50.7%) and Cambodia (50.7%). Conversely, Brunei Darussalam, Indonesia, Philippines, and Singapore recorded more modest increase ranging from 5% to 13%.

Figure 3.1.1. Road length (thousand kilometers) by ASEAN Members States, 2010-2022

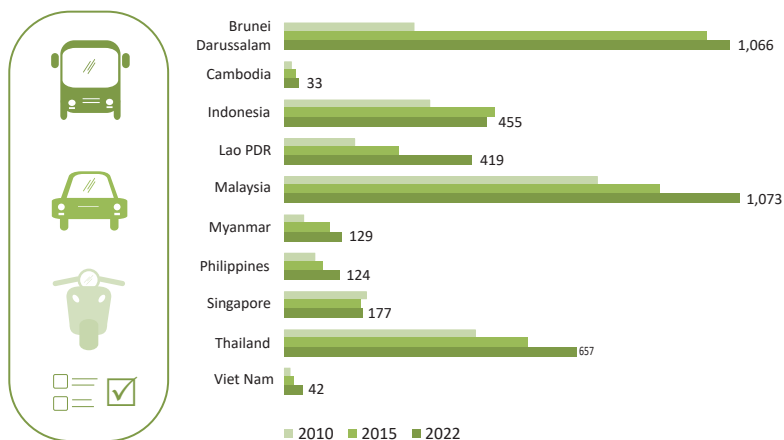


Note : The latest available data for Viet Nam is 2020
Source: ASEAN Secretariat, ASEANstats database

In the same period, ASEAN also experienced a significant increase in the number of motor vehicles (Figure 3.1.2). In 2022, the aggregate number of motor vehicles in ASEAN reached 234.3 million units, representing a growth of around 70% compared to the 2010 figure. Indonesia had the largest number of motor vehicles, with 125.4 million units, represented around 54% of the ASEAN total. Thailand followed with 43.4 million units, Malaysia with 35.1 million units, and the Philippines with 13.9 million units.

The total number of registered motor vehicles per 1,000 population increased by over 84% during the period, or 4.5% annually. Malaysia had the largest number of registered motor vehicles at 1,073.2 per 1,000 population. Brunei Darussalam and Thailand followed with 1,066.5 and 656.6 respectively.

Figure 3.1.2. Number of registered motor vehicles per 1,000 population by ASEAN Member States, 2010-2022



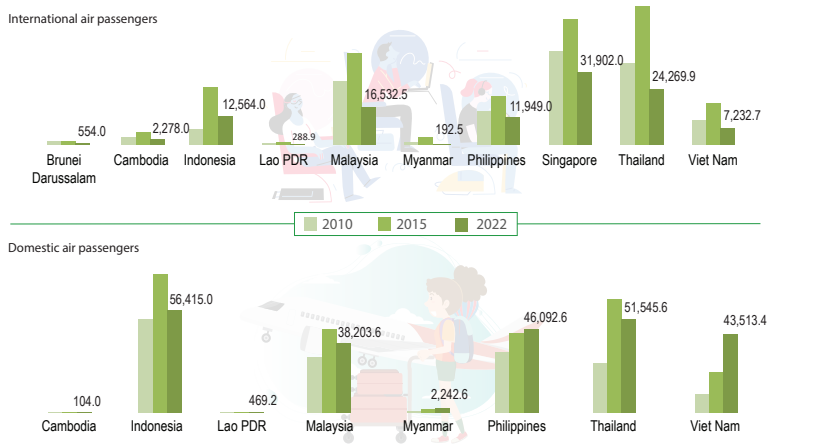
Note : The latest available data for Viet Nam is 2020
Source: ASEAN Secretariat, ASEANstats database

Air transport

Figure 3.1.3 shows that in 2022, driven by the lifting of COVID-19 restrictions, the number of international passengers in ASEAN grew significantly to reach more than 500% of the figure recorded in previous year. The number of international passengers in 2022 totaled 107.8 thousand, a significant increase compared to 17.7 thousand in 2021. Singapore, Thailand, Malaysia, Indonesia, and the Philippines contributed more than 90% of the number of international passengers in ASEAN.

In the same year, domestic passengers traffic increased by 161.3%, reaching 238.6 thousand. Indonesia had the largest number of traffic with 56.4 thousand domestic passengers, representing around 23.6% of the ASEAN total, followed by Thailand with 21.6%, Viet Nam with 18.2%, the Philippines with 19.3%, and Malaysia with 16.0%.

Figure 3.1.3. Number of international and domestic air passengers (thousand person) by ASEAN Member States, 2010-2022

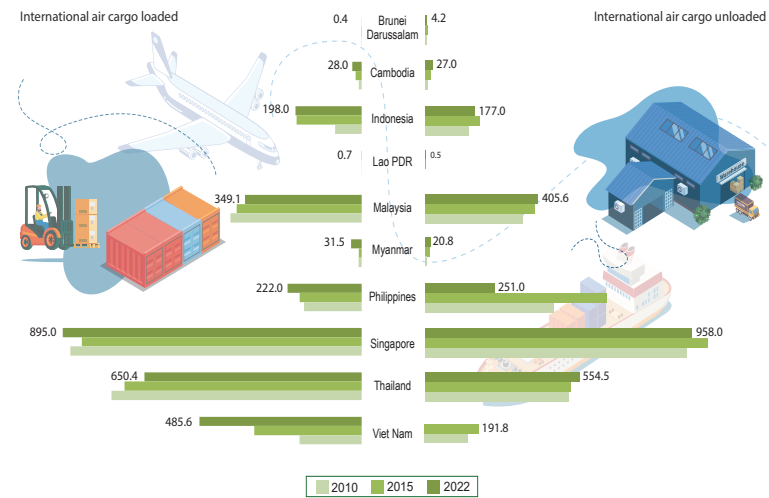


Notes : 1. For domestic air passenger traffic, the latest available data for Myanmar is 2021
 2. For international air passenger traffic, the latest available data for Myanmar is 2021; Viet Nam is 2020
 3. Domestic air passengers are not applicable for Brunei Darussalam and Singapore
 Source: ASEAN Secretariat, ASEANstats database

International air cargo loaded and unloaded

Compared to previous year, ASEAN’s international air cargo loaded in 2022 decreased by 1.6% while the unloaded increased by 4.0% (Figure 3.1.4). The Figure also highlights that Singapore, Thailand, and Indonesia’s air cargo services kept their position as the major distribution hub of air cargo delivery in the region. However, their international air cargo loaded decreased by 4.3%, 1.2%, and 42.9%, respectively, compared to 2021.

Figure 3.1.4. International air cargo loaded and unloaded (thousand tons) by ASEAN Member States, 2010-2022



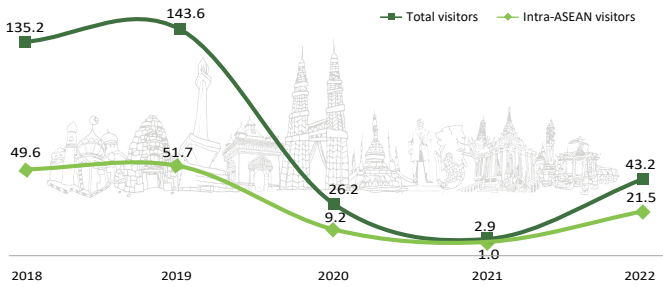
Note : The latest available data for Viet Nam cargo loaded is 2018 and cargo unloaded is 2012; Myanmar is 2021 for both cargo loaded and unloaded
Source: ASEAN Secretariat, ASEANstats database

3.2 VISITOR ARRIVALS

The gradual improvement of the COVID-19 pandemic situation and the reopening of borders has enabled the recovery of ASEAN tourism industry. After experiencing a decrease in 2020 and 2021, with only 26.2 million and 2.9 million visitors, respectively, the region observed a significant increase in international visitor arrivals in 2022, reaching a total of 43.2 million (Figure 3.2.1).

While the number of visitors has not yet reached the pre-pandemic level observed in 2019, a positive trend was observed during the first half of 2023. Approximately 46.5 million visitors arrived in the region, indicating encouraging progress.

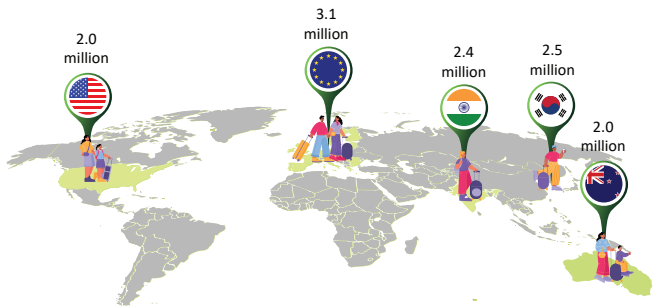
Figure 3.2.1. Number of visitor arrivals in ASEAN (million persons), 2018-2022



Source : ASEAN Secretariat, ASEANstats database

In addition, Figure 3.2.1 shows that the number of intra-ASEAN visitors increased in 2022 with almost half of the total visitors in ASEAN originating from within the region. Meanwhile, Figure 3.2.2 illustrates that the European Union was the largest source of non-ASEAN visitors to the region, accounting for 7.2% of all arrivals (3.1 million), followed by the Republic of Korea and India, contributing 5.8% and 5.5%, respectively. Australia and USA were also among the five-leading source of visitors, each contributing approximately 2 million visitors.

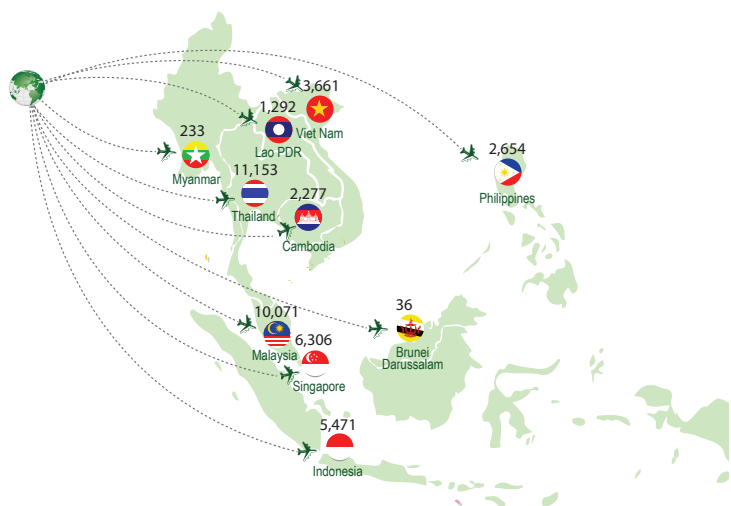
Figure 3.2.2. Top-5 origin countries of visitor arrivals from non-ASEAN countries (million person), 2022



Source : ASEAN Secretariat, ASEANstats database

The upward trend in international visitor arrivals was recorded in all AMS. Figure 3.2.2 presents the number of visitors in each AMS in 2022. It shows that Thailand hosted the highest number of visitor arrivals (11.2 million) among AMS, followed by Malaysia (10.1 million). Singapore and Indonesia received 6.3 million and 5.5 million visitors, respectively. Approximately 3.7 million tourists traveled to Viet Nam, 2.7 million to the Philippines, and 2.3 million to Cambodia. Meanwhile, Brunei Darussalam recorded the lowest number with only about 36 thousand visitors.

Figure 3.2.3. Number of visitor arrivals (thousand person) by ASEAN Member States, 2022



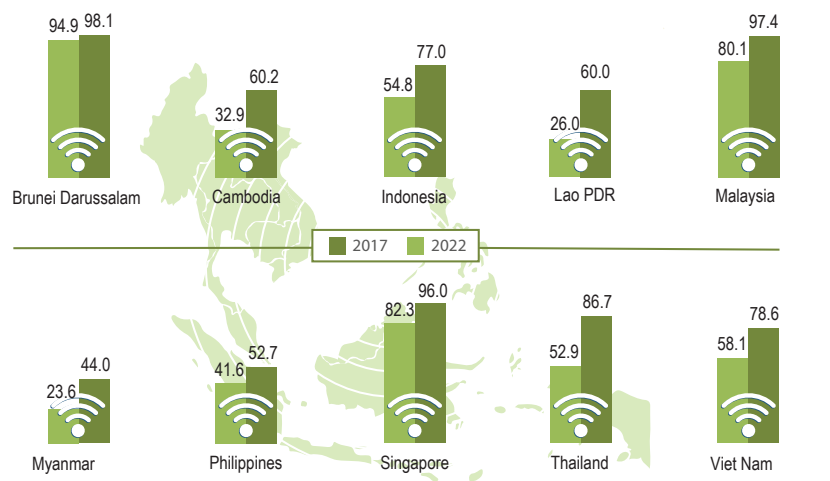
Source : ASEAN Secretariat, ASEANstats database

3.3 INTERNET SUBSCRIBERS

Aligned with a significant improvement in technology adoption and digitalization post-COVID-19 where telecommunication, video conferences, online shopping, and online schooling continued to gain popularity, the total number of internet subscribers in ASEAN witnessed significant increase

from 51.0 per 100 population in 2017 to 72.0 per 100 population in 2022 (Figure 3.3.1). Brunei Darussalam, Malaysia, and Singapore recorded the highest internet usage rates in 2022 with 98.1, 97.4, and 96.0 subscribers per 100 population, respectively. On the other hand, Myanmar recorded the lowest internet subscribers at 44.0 per 100 population in the same year.

Figure 3.3.1. Number of internet subscribers per 100 persons by ASEAN Member States, 2017 and 2022



Note : The latest available data for Brunei Darussalam, Cambodia, Myanmar, and the Philippines is 2021
Source: ASEAN Secretariat, ASEANstats database and ITU database for Brunei Darussalam, Cambodia, Myanmar, and the Philippines



4

ENERGY AND ENVIRONMENT





ENERGY AND ENVIRONMENT

INTRODUCTION

The SDGs encompass a wide range of interconnected issues including energy and environmental concerns. Acknowledging the important role of energy and environment, the seventh goal of SDGs aims to ensure access to affordable, reliable, sustainable and modern energy for all, whereas there are several goals directly addressing environmental issues and some others are not directly related but have significant implications for environmental sustainability. This section will discuss some energy and environment-related indicators to gauge ASEAN's progress in these areas.

4.1 ENERGY

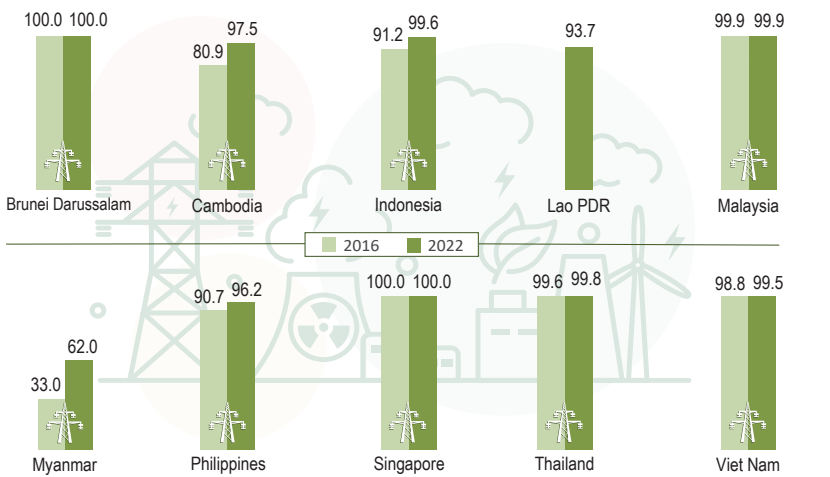
Access to electricity

By 2030, one of the SDGs targets is to ensure universal access to affordable, reliable and modern energy services. The proportion of population with access to electricity is one of the indicators to track the progress of this target. The level of access to electricity, which may vary across countries, reflects the level of development since electricity is one of major sources of enhancement and improvement of people's living standards.

Figure 4.1.1 illustrates the progress made by AMS in achieving the target of universal access to electricity. Both Brunei Darussalam and Singapore had successfully achieved the target of providing access to electricity for all of their population. According to the most recent data available, Indonesia, Malaysia, Thailand, and Viet Nam are on track to reach nearly universal access by 2030, with more than 99% of their populations having access

to electricity. Furthermore, Cambodia and Lao PDR have made significant progress and reported electricity coverage rates of 97.5% and 93.7%, respectively. Additionally, 96.2% of household in Philippines had access to electricity. However, additional efforts are needed in Myanmar, as only 62.0% of the population had access to electricity.

Figure 4.1.1. Population with access to electricity (%) by ASEAN Member States, 2016 and 2022



Note : 1. The latest available data for Cambodia is 2021, Malaysia and Thailand is 2019, Lao PDR is 2018
 2. Data for the Philippines refer to household with access to electricity
 Source: ASEAN Secretariat, ASEANstats database

Clean Fuels and Technologies

Universal access to energy also includes access to clean fuels and technologies for cooking, heating, and lighting. The proportion of population with primary reliance on clean fuels and technology is defined as the number of people using clean fuels and technologies for cooking, heating and lighting divided by total population reporting that any cooking, heating or lighting, expressed as percentage. According to the WHO Guidelines for

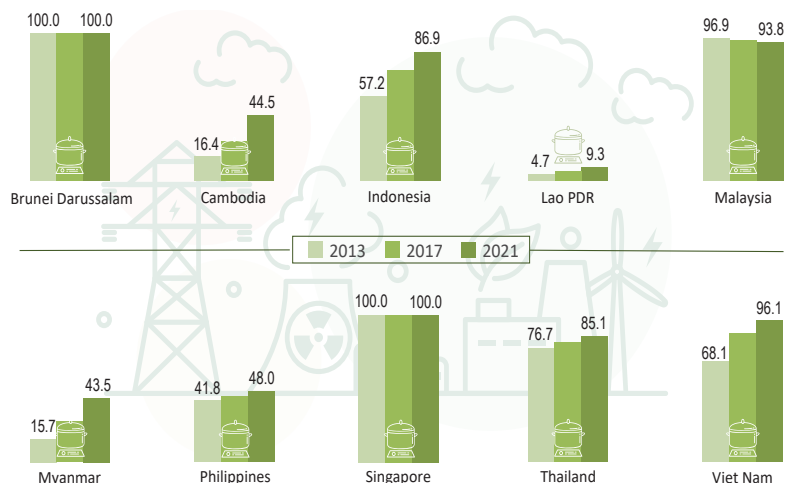
Indoor Air Quality: Household Fuel Combustion, it is recommended that all primary energy consumption in households for various purposes should employ efficient fuels and technology combinations to ensure health benefits. The utilisation of inefficient energy sources for cooking, heating, and lighting is correlated with elevated levels of indoor air pollution within households.

Based on the recommendations included in the guidelines, the fuels and technologies that are considered clean for cooking include electricity, natural gas, liquified petroleum gas, biogas, ethanol, and solar ⁶. The data presented in Figure 4.1.2 shows that the share of population with primary reliance on clean fuels and technologies for cooking varies among AMS. Similar to access to electricity, both Brunei Darussalam and Singapore have successfully achieved the target of providing universal access to clean fuels and technology for cooking. Furthermore, significant developments were observed in Viet Nam, Malaysia, Indonesia, and Thailand, where a significant proportion of the population, ranging from 85.1% to 96.1%, utilised clean fuels and technologies for cooking in 2021.

Nevertheless, despite the progress made, the coverage of access to clean fuels and technology for cooking remained low in other AMS. Only around 44% to 48% of population in Cambodia, Myanmar and the Philippines used clean fuels and technology for cooking. Furthermore, coverage in Lao PDR remained limited with only 9.3% of their population could rely primarily on clean fuels and technology for cooking in 2021.

6 [https://www.who.int/data/gho/indicator-metadata-registry/imr-details/population-with-primary-reliance-on-clean-fuels-and-technologies-for-cooking-\(millions\)](https://www.who.int/data/gho/indicator-metadata-registry/imr-details/population-with-primary-reliance-on-clean-fuels-and-technologies-for-cooking-(millions))

Figure 4.1.2. Population with primary reliance on clean fuels and technology for cooking (%) by ASEAN Member States, 2013, 2017, and 2021



Source: WHO (<https://www.who.int/data/gho/data/themes/air-pollution/household-air-pollution>)

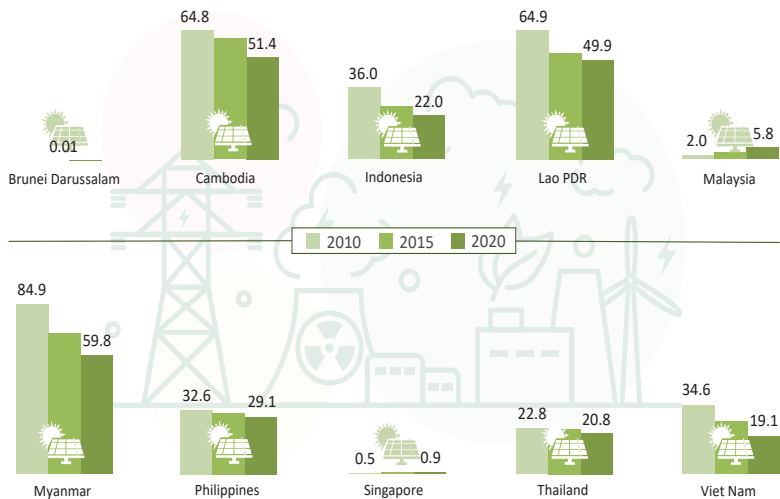
Renewable energy

The sustainable development agenda aims to increase substantially the share of renewable energy in the global energy mix by 2030. The share of renewable energy in the total final energy consumption is used to track the progress towards this objective. Renewable energy consumption includes consumption of energy derived from hydro, wind, solar, solid biofuels, liquid biofuels, biogas, geothermal, marine and renewable waste.

Latest available data on the share of renewable energy in total final energy consumption in AMS are presented in Figure 4.1.3. In 2020, Myanmar had the highest share of renewable energy source, accounting for 59.8% of its total energy mix, closely followed by Cambodia (51.4%) and Lao PDR (49.9%). Moreover, share of renewable energy consumption ranged from 19.1% to 29.1% in the Philippines, Indonesia, Thailand and Viet Nam.

Meanwhile, only 5.8% of energy consumed in Malaysia was generated from renewable sources. Singapore and Brunei Darussalam recorded the lowest share, with 0.9% and 0.01%, respectively.

Figure 4.1.3. Renewable energy share in the total final energy consumption (%) by ASEAN Member States, 2010, 2015, and 2020



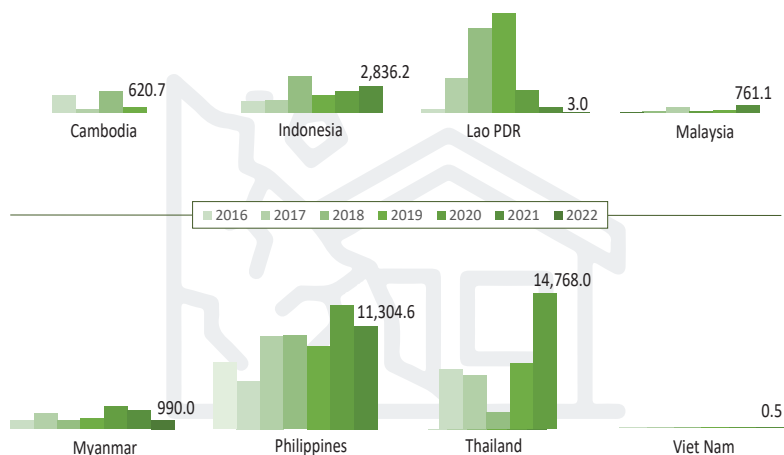
Source: UNstats - SDG Global Database

4.2 ENVIRONMENT

Climate-related disasters losses

The indicators on number of deaths, missing persons and directly affected persons attributed to disasters per 100,000 population serve as one of the progress measures of some SDGs targets, particularly under Goal 1 - end poverty in all its forms everywhere, Goal 11 - make cities and human settlements inclusive, safe, resilient, and sustainable, and Goal 13 - take urgent action to combat climate change and its impacts.

Figure 4.2.1. Number of deaths, missing persons and directly affected persons attributed to climate-related disasters per 100,000 population by ASEAN Member States, 2016-2022



Notes : 1. Brunei Darussalam and Singapore are not prone to climate-related disaster, hence the data is not available

2. Data for Viet Nam only cover number of deaths, missing and injured

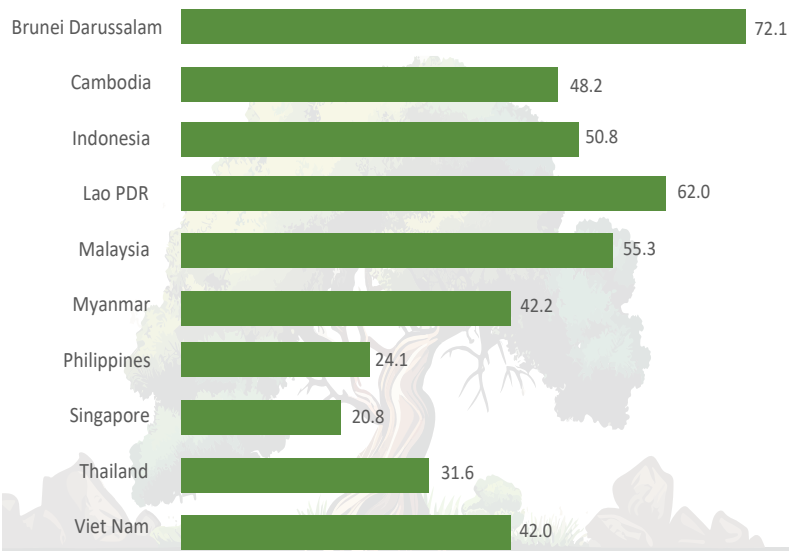
Source: ASEAN Secretariat, ASEANstats database

The number of climate-related disaster fatalities, missing persons, and directly affected persons in AMS fluctuated from 2016 to 2022, as depicted in Figure 4.2.1. In 2022, the Philippines reported the highest number of casualties, where a total of 11,305 persons per 100,000 population died, went missing, or were directly affected by climate-related disasters. Thailand reported a twofold increase in 2020, with the number of casualties reported was 14,768 persons per 100,000 population. Meanwhile, the number of victims in Indonesia was 2,836 persons per 100,000 population in 2021. Additionally, Myanmar and Malaysia reported 990 persons and 761 persons per 100,000 population had either died, went missing or were directly affected by climate-related disasters in 2022 and 2021, respectively.

Forest area

The proportion of forest area to total land area is a key indicator used to measure progress towards SDGs Goal 15 - protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss.

Figure 4.2.2. Forest area as a proportion of total land area (%) by ASEAN Member States, 2022



Note : The latest available data for Indonesia and Thailand is 2021, Philippines is 2020, Cambodia, Malaysia, and Singapore is 2018

Source: ASEAN Secretariat, ASEANstats database

The latest available data in AMS on the proportion of forest area to total land area is shown in Figure 4.2.2. Brunei Darussalam had the most significant proportion of forest area, accounting for 72.1% of its total land

area, followed by Lao PDR, which had a forest area share of 62.0% of its total land area. Furthermore, the proportion of land covered by forests in Malaysia and Indonesia was 55.3% and 50.8% of their total land areas, respectively. The proportion of total land area covered by forests in the remaining AMS ranged from 20.8% to 48.2%.

Key Biodiversity Areas

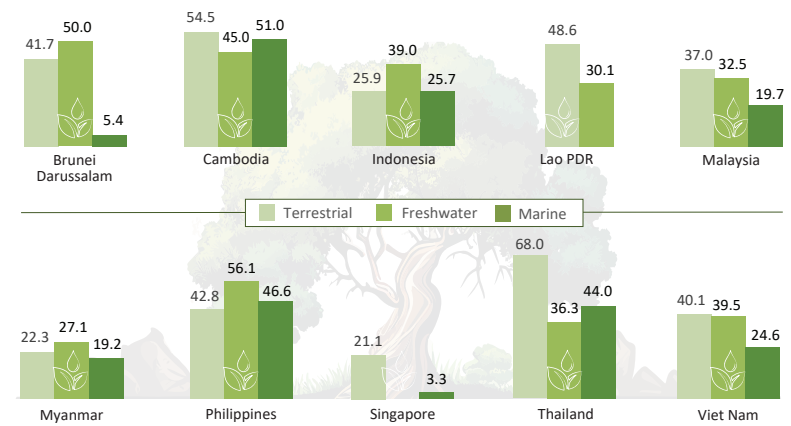
Key Biodiversity Areas (KBA) are sites contributing significantly to the global persistence of biodiversity in terrestrial, freshwater and marine ecosystems. Meanwhile protected areas, as defined by the International Union for Conservation of Nature (IUCN), are clearly defined as geographical spaces, recognized, dedicated and managed, through legal or other effective means, to achieve the long-term conservation of nature with associated ecosystem services and cultural values. In addition, other effective area-based conservation measures (OECMs) are defined by the Convention on Biological Diversity (CBD) as a geographically defined area other than a protected area, which is governed and managed in ways that achieve positive and sustained long-term outcomes for the in-situ conservation of biodiversity, with associated ecosystem functions and services and where applicable, cultural, spiritual, socio-economic, and other locally relevant values.

The indicator, proportion of important sites for marine, terrestrial and freshwater biodiversity that are covered by protected areas, shows trends in the mean percentage of each marine, terrestrial and freshwater KBA that is covered by designated protected areas and/or OECMs. The safeguard of important sites is vital for stemming the decline in biodiversity and ensuring long term and sustainable use of marine, terrestrial and freshwater natural resources. The establishment of protected areas is an important mechanism for achieving this aim, and this indicator serves as a means of measuring progress toward the conservation, restoration and sustainable use of marine, terrestrial and freshwater ecosystems and their

services, in line with obligations under international agreements (SDGs target 14.5 and 15.1)⁷.

Figure 4.2.3 shows the diversity of the average proportion of marine, terrestrial and freshwater KBA covered by protected areas across AMS in 2022. In term of terrestrial ecosystem, Thailand had the highest coverage of KBAs by protected areas at 68.0%, followed by Cambodia with the coverage of 54.5%. Meanwhile, the Philippines reported the highest coverage for the freshwater ecosystem, with 56.1% of its KBAs covered by protected areas, followed by Brunei Darussalam with the coverage of 50.0%. Cambodia also reported the highest proportion of marine KBAs covered by protected areas, at 51.0%.

Figure 4.2.3. Average proportion of marine, terrestrial and freshwater key biodiversity areas (KBAs) covered by protected areas (%) by ASEAN Member States, 2022



Note : The freshwater key biodiversity areas is not applicable for Singapore and marine key biodiversity areas is not applicable for Lao PDR
Source : UNstats - SDG Global Database

7 <https://unstats.un.org/sdgs/metadata/?Text=marine&Goal=14&Target=14.5> and <https://unstats.un.org/sdgs/metadata/?Text=&Goal=15&Target=15.1>

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