

ASEAN MATTERS FOR AMERICA MATTERS FOR ASEAN

FIFTH EDITION



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EAST-WEST CENTER



US-ASEAN
BUSINESS COUNCIL, INC.



YUSOF ISHAK
INSTITUTE

The East-West Center promotes better relations and understanding among the people and nations of the United States, Asia, and the Pacific through cooperative study, research, and dialogue. Established by the US Congress in 1960, the Center serves as a resource for information and analysis on critical issues of common concern, bringing people together to exchange views, build expertise, and develop policy options.

Since 1984, the US-ASEAN Business Council has been the premier advocacy organization for US corporations operating within the dynamic Association of Southeast Asian Nations (ASEAN). Worldwide, the Council's membership of more than 165 companies generates almost US\$7 trillion in revenue and employs nearly 15 million people. Today our members include the largest US companies conducting business in ASEAN, and range from newcomers to the region to companies that have been working in Southeast Asia for more than 100 years. The Council has nine offices around the globe, in Washington, DC; New York, NY; Bangkok, Thailand; Hanoi, Vietnam; Jakarta, Indonesia; Kuala Lumpur, Malaysia; Manila, Philippines; Singapore; and Yangon, Myanmar. For more information, please visit www.usasean.org.

ISEAS-Yusof Ishak Institute (formerly Institute of Southeast Asian Studies) is an autonomous organization established in 1968. It is a regional centre dedicated to the study of socio-political, security, and economic trends and developments in Southeast Asia and its wider geostrategic and economic environment. The ASEAN Studies Centre (ASC) was established in 2008 under the ISEAS-Yusof Ishak Institute to research on issues pertaining to the Association of Southeast Asian Nations (ASEAN) as an institution and a process. The ASC is the first Institutional Recipient of the ASEAN Prize in 2020, a prestigious award to honour the outstanding achievements of individuals or organisations who have made meaningful contribution to ASEAN.

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ASEAN MATTERS FOR AMERICA/ AMERICA MATTERS FOR ASEAN

This project maps the trade, investment, employment, business, diplomacy, security, education, tourism, and people-to-people connections between the United States and the 10 member states of the Association of Southeast Asian Nations (ASEAN) at the national, state, and local levels. Part of the *Asia Matters for America* initiative, this publication, the one-page connections summaries for states, and the AsiaMattersforAmerica.org website are resources for understanding the robust and dynamic US-ASEAN relationship.

AsiaMattersforAmerica.org/ASEAN

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Highlights

ASEAN IN PROFILE

With More Than 662 Million People, the Association of Southeast Asian Nations (ASEAN) has the 3rd Largest Population in the World and a GDP of \$3.2 Trillion

ASEAN seeks to promote economic growth and regional stability among its members through consultation, consensus, and cooperation based on the Treaty of Amity and Cooperation (TAC) to which 43 countries including the United States (US) have acceded.

ASEAN ECONOMY

ASEAN is Currently the 3rd Largest Economy in the Indo-Pacific and the 5th Largest in the World

The ASEAN Economic Community (AEC), established in 2015, has a combined GDP of \$3.2 trillion, and is also the 3rd fastest-growing major Indo-Pacific economy in the past decade, after China and India.

ASEAN HEALTH

Universal Healthcare is Being Adopted by ASEAN Member States

Indonesia has one of the world's largest free healthcare programs, covering approximately 180 million people.

ASEAN ECONOMIC GROWTH PROJECTIONS

ASEAN's Economy is Projected to Grow by Over 5.5% Per Year and Become the 4th Largest Economy in the World by 2030

With a projected annual growth rate of over 5.5% per year, ASEAN is forecast to overtake India and Japan to become the 4th largest economy in the world by 2030.

THE UNITED STATES AND ASEAN STRATEGIC PARTNERSHIP

ASEAN Member States are Key Diplomatic, Economic, and Security Partners for the United States

The US-Singapore Free Trade Agreement (FTA), which went into force in 2004, was America's first FTA in the Indo-Pacific, and the US currently has a trade surplus with Singapore.

TRADE

The United States Exports More Than \$122 Billion in Goods and Services to ASEAN

ASEAN ranks 4th after Canada, Mexico, and China as a goods export market for the United States, and the United States is the 2nd largest trading partner for ASEAN.

AGRICULTURE

ASEAN is a Top Five Destination for US Food and Agricultural Exports

The United States exports \$13.7 billion in food and agricultural goods to ASEAN, including over \$2 billion in soybeans and \$1.6 billion in cotton.

Highlights

JOBS

All 50 US States Export to ASEAN, Supporting More Than 625,000 US Jobs

Nineteen states have more than 10,000 jobs that rely on exports to ASEAN member states, and in 13 US states ASEAN accounts for more than 20% of export-dependent jobs to the Indo-Pacific.

INVESTMENT

ASEAN is the Number One Destination for US Investment in the Indo-Pacific

ASEAN has received more than \$338 billion in total US foreign direct investment, more than the United States has invested in China, India, Japan, and South Korea combined.

INFRASTRUCTURE

Infrastructure Development in ASEAN is One of the Top Priorities for Member States

The US government's Asia EDGE initiative has mobilized \$806 million in private and public investment to fund 11 renewable energy projects in Indonesia and supported Vietnam's growing solar energy market.

DIGITAL ECONOMY

ASEAN's Digital Economy is Projected to Exceed \$300 Billion by 2025

With over 400 million active internet connections, and growing at a double-digit pace, ASEAN is the world's fastest-growing internet market, and one of the largest digital economies in the world.

TRAVEL AND TOURISM

Visitors from ASEAN Add Nearly \$8 Billion to the US Economy Annually

In 2019, nearly 1.3 million people from ASEAN countries visited the United States, while over 4.8 million Americans visited ASEAN.

EDUCATIONAL EXCHANGE

ASEAN Students Contribute More Than \$2 Billion to the US Economy

More than 55,000 students from ASEAN study in the United States, comprising 5% of all international students.

POPULATION

More Than One-Third of Asian Americans Identify with an ASEAN Ethnicity

Of the estimated 22 million Asian Americans in the United States, 7.6 million identify with one of nine ASEAN ethnicities tracked by the US Census Bureau.

SISTER PARTNERSHIPS

110 Sister Relationships between the United States and ASEAN Build People-to-People and Commercial Connections

Seven ASEAN member states have formed partnerships with 23 US states and the District of Columbia.

With More Than 662 Million People, the Association of Southeast Asian Nations (ASEAN) has the 3rd Largest Population in the World and a GDP of \$3.2 Trillion

ASEAN is a 10-member regional bloc with a combined GDP of \$3.2 trillion, a population of 662 million, and a land mass covering more than 1.7 million square miles (larger than the land area of India). Founded in 1967 by Indonesia, Malaysia, the Philippines, Singapore, and Thailand, ASEAN has since expanded to include Brunei, Cambodia, Laos, Myanmar, and Vietnam. ASEAN's community-building effort comprises three pillars: the Political Security Community; Economic Community; and Socio-Cultural Community. ASEAN holds semiannual ASEAN Summits and numerous ministerial and working-level meetings in support of its community-building objectives.

ASEAN seeks to promote economic growth and regional stability among its members through consultation, consensus, and cooperation based on the Treaty of Amity and Cooperation to which 43 countries, including the United States, have acceded. ASEAN member states are helping to shape important regional economic, political and security initiatives by convening key Indo-Pacific countries at the annual East Asia Summit and other fora.

ASEAN IS AT THE CENTER OF A DYNAMIC INDO-PACIFIC REGION



ASSOCIATION OF SOUTHEAST ASIAN NATIONS (ASEAN)

ASEAN Secretariat: Jakarta, Indonesia

Population: 662 million

Chair rotates annually among member states.

The ASEAN-US relationship began formally in 1977. The United States acceded to the Treaty of Amity and Cooperation in Southeast Asia in 2009 and was the first non-ASEAN country to appoint a resident Ambassador to ASEAN in 2019. The United States joined the East Asia Summit in 2011 and institutionalized annual ASEAN-US summits in 2012. The ASEAN Community was realized on December 31, 2015. The United States elevated its relationship with ASEAN to a Strategic Partnership on November 21, 2015.

ASEAN.org



BRUNEI

Capital: Bandar Seri Begawan

Population: 461 thousand

Member Since: 1984

The United States and Brunei held their first bilateral army exercises in 2018, focusing on jungle and urban warfare.



INDONESIA

Capital: Jakarta

Population: 269.6 million

Member Since: 1967

Indonesia, the world's 3rd largest democracy, and the United States upgraded their relations to a "strategic partnership" in 2015.



CAMBODIA

Capital: Phnom Penh

Population: 16.7 million

Member Since: 1999

The United States is the largest purchaser of Cambodia's exports, including over \$2 billion in apparel.



LAOS

Capital: Vientiane

Population: 7.3 million

Member Since: 1997

In 2016, then President Barack Obama became the first sitting US President to visit Laos.



MALAYSIA

Capital: Kuala Lumpur

Population: 33 million

Member Since: 1967

US investments in Malaysia were \$10.8 billion in 2019, making the United States one of the country's largest sources of foreign direct investment that year.



SINGAPORE

Capital: Singapore

Population: 5.8 million

Member Since: 1967

Singapore was the first US bilateral free trade partner in the Indo-Pacific, and in 2015 the two countries signed an enhanced Defense Cooperation Agreement.



MYANMAR

Capital: Nay Pyi Taw

Population: 53.2 million

Member Since: 1997

The United States restored full diplomatic relations with Myanmar in 2012 and has invested over \$285 million in the country to support private sector-led growth.



THAILAND

Capital: Bangkok

Population: 69.8 million

Member Since: 1967

Thailand is the oldest US treaty partner in the Indo-Pacific, dating from 1833.



PHILIPPINES

Capital: Manila

Population: 108.9 million

Member Since: 1967

The largest Filipino diaspora is in the United States, with over four million US citizens of Philippine ancestry—the third largest Asian population in the United States.



VIETNAM

Capital: Hanoi

Population: 97.4 million

Member Since: 1995

US trade with Vietnam has grown exponentially since 1994, reaching \$77 billion in 2019—a 32% increase over the previous year.



Source Population: International Monetary Fund (IMF) World Economic Outlook, 2020 data.
Additional Sources: World Bank, Organization for Economic Cooperation and Development (OECD), CIA World Fact Book, US Department of State, ASEAN Secretariat, White House Archives

Numbers rounded throughout publication. All monetary values are in US\$ unless otherwise noted. Whenever possible, the most recent available data is used. For the most up-to-date data please visit AsiaMattersForAmerica.org/ASEAN

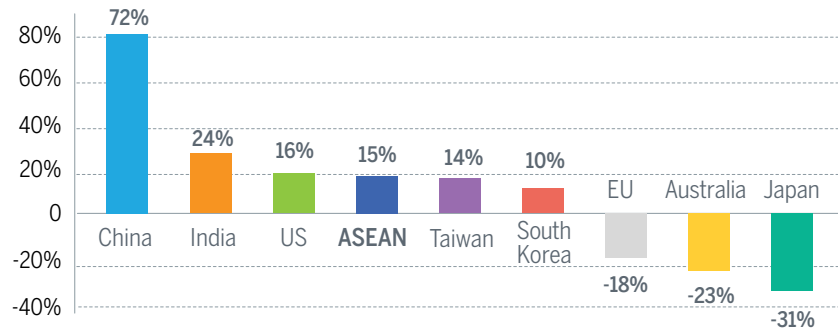
ASEAN is Currently the 3rd Largest Economy in the Indo-Pacific and the 5th Largest in the World

The ASEAN Economic Community (AEC), established in 2015, has a combined GDP of \$3.2 trillion and is the 3rd fastest-growing major Indo-Pacific economy in the past decade, after China and India. As a critical hub for global trade, over \$2.8 trillion in global trade transited the ASEAN region in 2019 alone.

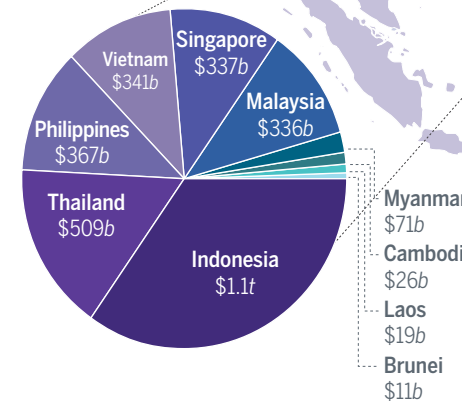
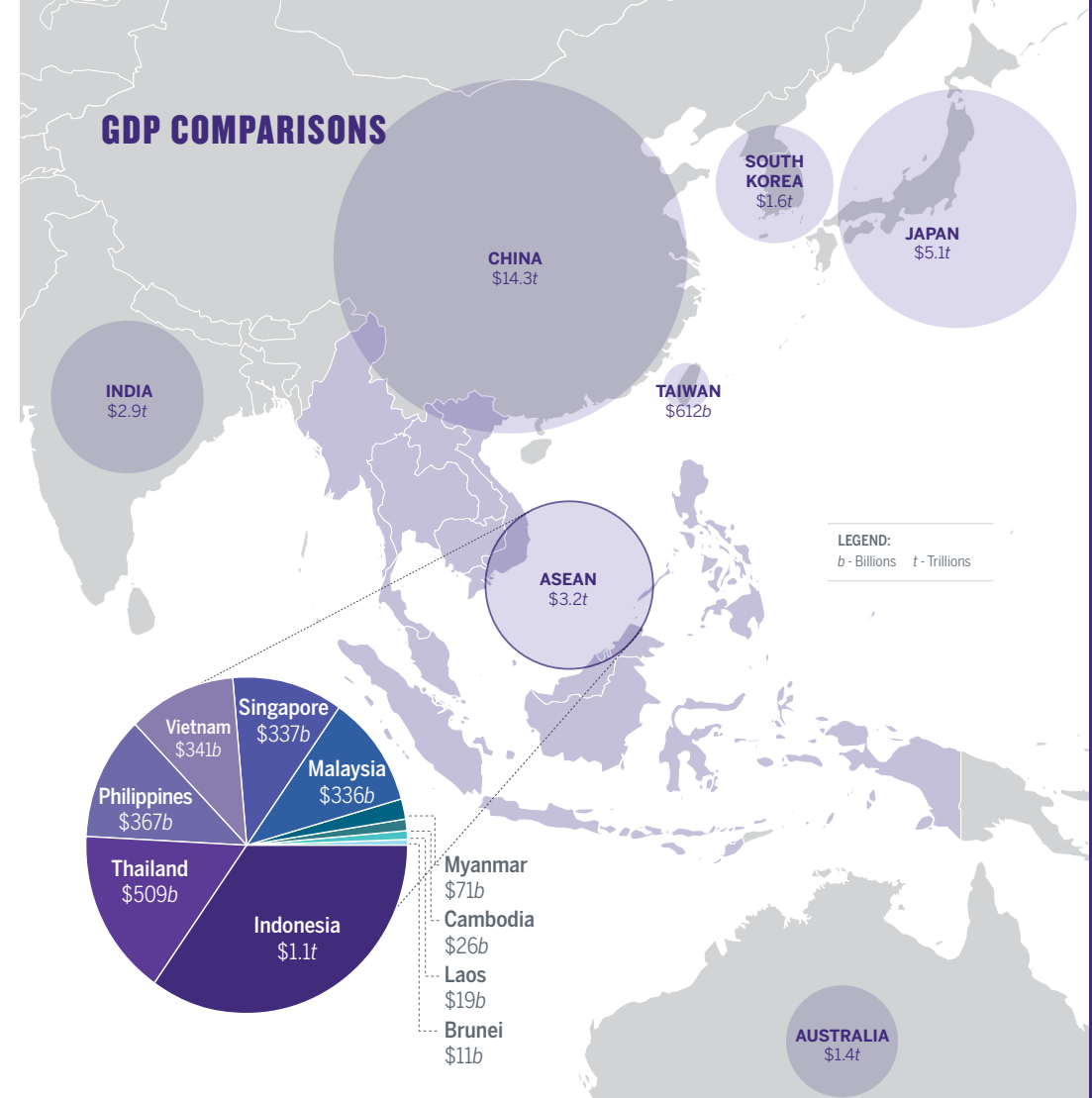
The AEC seeks to reduce or remove trade barriers to facilitate the free movement of goods, services, capital, and skilled labor within the ASEAN region. A single customs window, known as the ASEAN Single Window, was developed to expedite cargo clearance and promote ASEAN economic integration. In December 2019, all 10 ASEAN member states joined the ASEAN Single Window.

REAL GDP GROWTH*

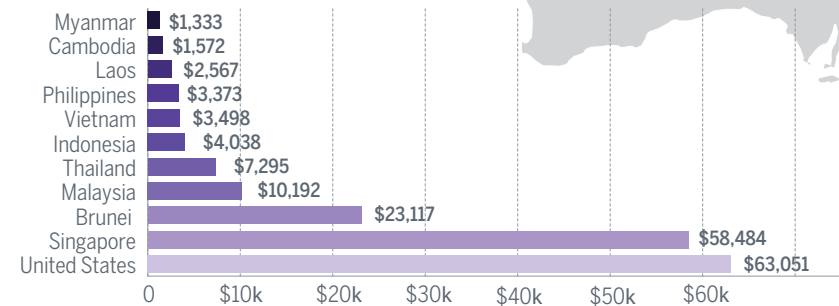
ASEAN's GDP compared to other Indo-Pacific economies from 2011–2020



*Real GDP growth was calculated in constant US\$ using World Bank methodology. For further information on our methodology please visit AsiaMattersforAmerica.org/sources-and-methodology
 NOTE: Global GDP rankings include the EU as a single entity
 Source: International Monetary Fund World Economic Outlook (April 2021), 2019 data, IMF



PER CAPITA GDP



FREE TRADE AGREEMENTS

ASEAN is at the heart of a network of plurilateral and bilateral free trade agreements in the Indo-Pacific region. ASEAN has free trade agreements (FTAs) in place with the region's biggest economies including China, Japan, South Korea, Australia & New Zealand, and Hong Kong. An ASEAN-Canada FTA is under discussion. The recently signed Regional Comprehensive Economic Partnership Agreement (RCEP), which includes all ASEAN countries and five other Indo-Pacific partners, is expected to enter into force in 2022. Four ASEAN members—Brunei, Malaysia, Singapore, and Vietnam—have signed the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) FTA which currently includes 11 members but may be expanded to include others. Singapore is the only ASEAN member state to conclude FTAs with both the United States and the European Union. These networks of FTAs are a key reason why several ASEAN member nations are viewed as trusted trade partners playing vital roles in the global and regional supply chains of numerous industry sectors.

ASEAN-US COOPERATION ON CLIMATE CHANGE

By 2100, temperatures in ASEAN are projected to increase between 0.8–3.2 degrees Celsius. In the United States, warming has accelerated over the past three decades with greater frequency of severe weather. Both the United States and ASEAN are vulnerable to the impact of climate change.

Climate change patterns are expected to exacerbate conflicts in the South China Sea (SCS), where the region shares vast amounts of natural resources, and the Mekong Delta, where half of the arable land may be inundated by rising sea levels. Excessive resource extraction exacerbated by rising temperatures in the SCS has already depleted fish stocks by a third over the past 30 years, one of the primary sources of food for many communities, and a critical industry for the region.

The ASEAN-US Joint Statement on Climate Change reflected a commitment to tackling climate change under the UN Framework Convention on Climate Change (UNFCCC). The United States works closely with ASEAN on a number of climate change initiatives. The region is hopeful that the United States re-joining of the Paris Agreement in 2021 will reinvestigate climate cooperation in Southeast Asia. For ASEAN to meet the ambitions of the Paris Agreement, the estimated financing requirement will be around \$3 trillion by 2030. However, by 2019, annual financing had only reached \$40 billion.

EXAMPLES OF CLIMATE INITIATIVES

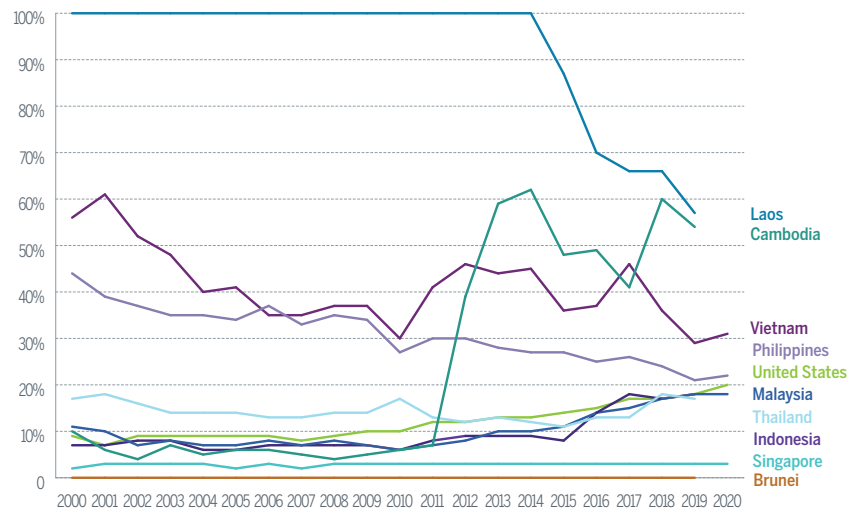
PARTNERS/PROGRAMS	ACTIVITIES
ASEAN Coordinating Centre for Humanitarian Assistance	<ul style="list-style-type: none"> Cooperation to improve climate-related disaster response coordination
US-Indonesia Climate Change Partnership*	<ul style="list-style-type: none"> Focus on Net Zero Emissions, Land Use, Forestry, Mangroves, Marine, Renewable Energy and Energy Transition, Sustainable Finance *Still in discussions as of the time of this publication
US-ASEAN Smart Cities Partnership	<ul style="list-style-type: none"> Platform for the US government and private sector to share best practices on sustainable cities with the ASEAN Smart City Network
Science & Technology Fellows Program	<ul style="list-style-type: none"> Provides opportunities for Southeast Asian scientists to tackle issues like climate change and biodiversity conservation
USAID	<p>Clean Power Asia Program: Promotes low-emission power systems, integrate renewable targets into national power development plans, support grid-connected renewable energy development, and secure finances for clean energy projects</p>
	<p>LESTARI: Sustainable forest management projects for reduction of greenhouse gases in Indonesia</p>
	<p>BIJAK: Biodiversity conservation projects in Indonesia</p>
	<p>Food for Progress Program: Improve agricultural productivity and trade in Laos, Cambodia, Indonesia, the Philippines, and Vietnam by deploying agricultural commodities</p>
Mekong-US Partnership	<p>Vietnam Forests and Delta Program: Strategies for climate action in forestry and agriculture</p>
	<p>Focused on economic connectivity, human capital development, transboundary water and natural resources management, and non-traditional security, including collaboration on emerging threats such as health security, pandemic response, countering transnational crime, cyber security, and countering trafficking in people, drugs, and wildlife</p>
US International Development Finance Corporation	<ul style="list-style-type: none"> Financed construction of Indonesia's first utility-scale power plant (30 turbines connected to the grid) in Sulawesi Credit guarantor of Tridi Oasis in Jakarta to support plastic recycling Credit guarantor for sustainable fishing industry in Philippines

Sources: The Greater Mekong and Climate Change (WWF); Asia & the Pacific Policy Society; US Environmental Protection Agency; US Embassy in Indonesia; CAIT; World Bank, ASEAN Climate Action: A Review of Nationally Determined Contributions Updated in 2020 (ASEAN Centre for Energy); Mekong-US Partnership

ASEAN RENEWABLE ENERGY

Although ASEAN remains heavily dependent on coal and other fossil fuels for energy, the region has made strong renewable energy commitments, including 23% of energy through renewables by 2025 and 32% reduction in energy intensity from 2005 levels. ASEAN energy demands are expected to grow 38% by 2025 and 146% by 2040, mainly driven by increasing urban populations, transport, and industry. The ASEAN Center for Energy noted that to achieve the region's stated commitments, investments of more than \$580 billion would be required. The climate-energy nexus and the transition to low-carbon economies is critical for both the United States and ASEAN countries to achieve their Nationally Determined Contributions (NDCs) under the Paris Agreement.

SHARE OF RENEWABLES IN ELECTRICITY GENERATION*



GREEN FINANCE

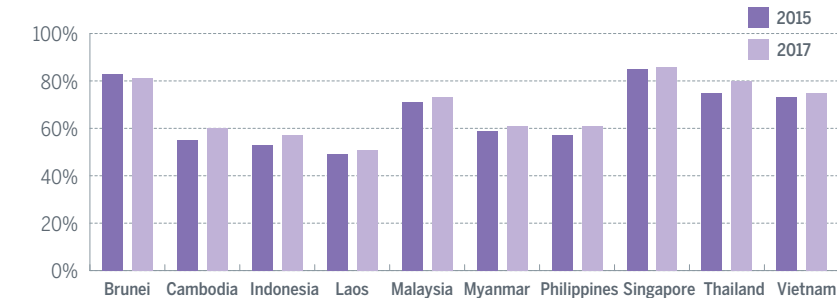
Green bonds fund projects that have positive environmental or climate benefits. The global volume of green bonds and loan issuance rose sharply by over 50% from \$171 billion in 2018 to \$258 billion in 2019, buoyed by strong interest from both investors and issuers. ASEAN green bonds represented only 3% of the global total in 2019. ASEAN's issuance of green bonds almost doubled, reaching \$8.1 billion in 2019 from \$4.1 billion in 2018, supported by new regulations and guidelines. In comparison, US green bonds reached \$52.9 billion in 2019, 6.5 times the size of ASEAN's green bond market. Two-thirds of the proceeds are allocated to the Energy and Infrastructure sectors. Singapore contributed to 55% of the ASEAN green debt issuance in 2019, up from 29% in 2018, cementing its position as the region's leader in green bonds.

*No data available for Myanmar. Data limited to 2019 for Brunei, Cambodia, Indonesia, Laos, and Malaysia. Source Share of Renewables: Global Electricity Review Dataset 2021, Ember; Additional Sources: IRENA's Renewable Energy Outlook for ASEAN; Report on Promoting Sustainable Finance in ASEAN; ASEAN Green Finance State of the Market 2019 report; ASEAN Green Financial Instruments Guide, Climate Bonds Initiative;

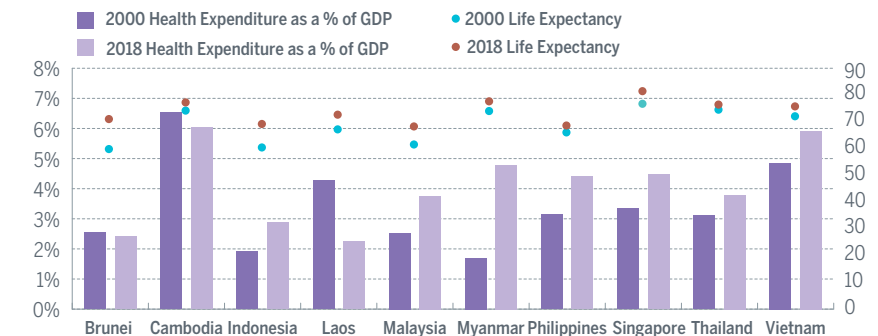
Universal Healthcare is Being Adopted by ASEAN Member States

Health care expenditure in ASEAN accounts for 4% of the region's total GDP, lower than the global average of 10%, and relies heavily on public funding. Singapore has the highest healthcare expenditures per capita at \$2,823 but also leads ASEAN in preventative care measures such as access to healthcare providers, sanitation, and vaccines. One-third of the 11 million global medical consumers travel to ASEAN annually. Singapore, Malaysia, and Thailand are major medical tourism destinations, with 40% of healthcare revenue in those countries coming from medical tourism. The COVID-19 pandemic has highlighted the need for further investment in healthcare in the region, including in biotechnology, telehealth, biopharmaceuticals, medtech, and diagnostic medicine. Universal healthcare is also being adopted by ASEAN member states. Indonesia has one of the world's largest free healthcare programs, covering approximately 180 million people.

UNIVERSAL HEALTH CARE PERCENT OF POPULATION



HEALTH EXPENDITURE VS LIFE EXPECTANCY



Source Universal Health Care: "Progress toward universal health coverage in ASEAN," National Institutes of Health; Source Health Expenditure: World Bank, 2018 data; Source Life Expectancy: World Health Organization, 2020 data

ASEAN's Economy is Projected to Grow by Over 5.5% per Year and Become the 4th Largest Economy in the World by 2030

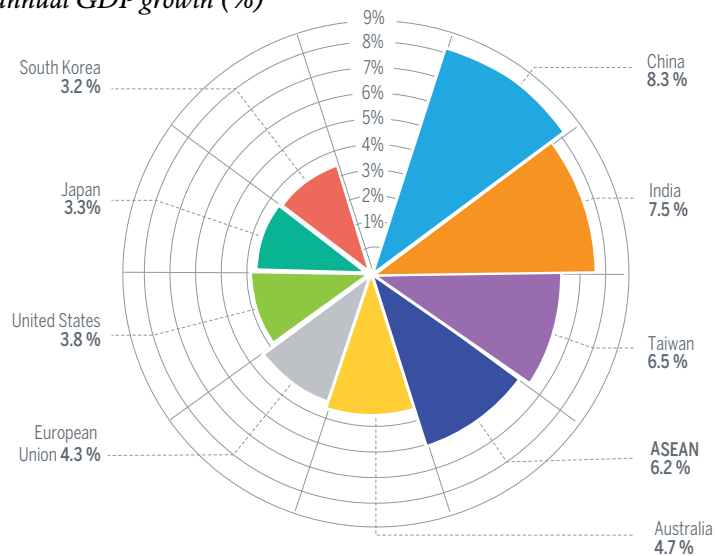
With a projected annual growth rate of over 5.5%, ASEAN is forecast to overtake India and Japan to become the 4th largest economy in the world by 2030.

Over 380 million people in ASEAN are under age 35 (58% of the population), roughly 20% larger than the entire population of the United States. ASEAN also has the world's 3rd largest labor force, trailing only China and India. ASEAN's middle class is expected to more than double in size from 135 million (24% of ASEAN's population) to 350 million (51% of the population) by 2030. Sustainable urbanization is a key part of this demographic growth, and it is estimated that nearly 70% of ASEAN's population will live in urban areas by 2030.

Women's economic empowerment is another key element to economic growth. With ASEAN's female population equal to that of the total population of the United States, increased female participation in the workforce could add nearly \$370 billion to ASEAN's economy.

PROJECTED ANNUAL GDP GROWTH RATE

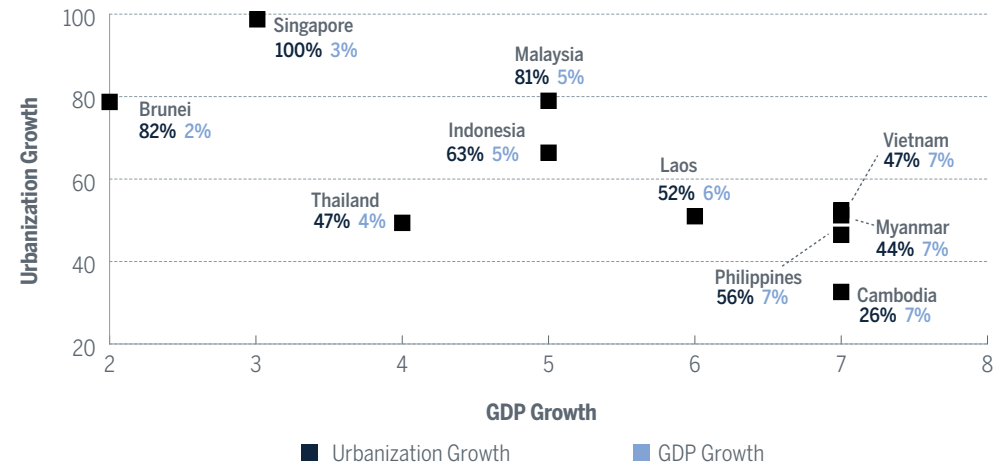
Average annual GDP growth (%)



WOMEN'S ECONOMIC PARTICIPATION IN ASEAN*



PROJECTED GDP AND URBANIZATION GROWTH



*No data available for potential economic impact for Brunei and Laos. The potential economic impact is to annual GDP by 2025 and under the best-case scenario in the 2014 US dollar.

Sources Women: International Labour Organization statistics, 2019; ASEAN Statistical Yearbook, 2020; "The power of parity: Advancing women's equality in Asia Pacific", McKinsey Global Institute, 2018

Source Projected GDP Growth: International Monetary Fund (IMF) World Economic Outlook, April 2021, 2018-2026 data

Source GDP and Urbanization: International Monetary Fund and UN World Urbanization Prospectus, 2025 data

ASEAN Member States are Key Diplomatic, Economic, and Security Partners for the United States

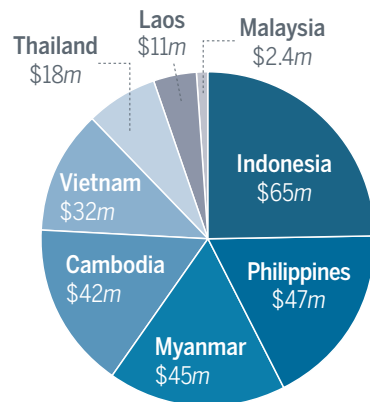
The US-ASEAN relationship began in 1977 and has since expanded significantly. The United States signed the Treaty of Amity and Cooperation in 2009 and was the first non-ASEAN country to establish a dedicated resident ambassador and permanent mission to the organization. The United States joined the East Asia Summit in 2011 and began to hold annual ASEAN-US Summits in 2012. In 2015, the US-ASEAN relationship was raised to a strategic partnership and in 2020, the parties adopted a new ASEAN-US Plan of Action (2021-2025) to guide the US-ASEAN Strategic Partnership. The United States and ASEAN discuss and coordinate security activities through the ASEAN Regional Forum and the ASEAN Defense Ministers Meeting Plus.

Economic ties were formalized with the US-ASEAN Trade and Investment Framework Agreement in 2006 and elaborated on with the Expanded Economic Engagement Work Plan in 2012. The US Trade Representative also participates in annual consultations during the ASEAN Economic Ministers Meetings. The US-Singapore Free Trade Agreement, which went into force in 2004, was America's first FTA in the Indo-Pacific.

PUBLIC HEALTH COLLABORATION

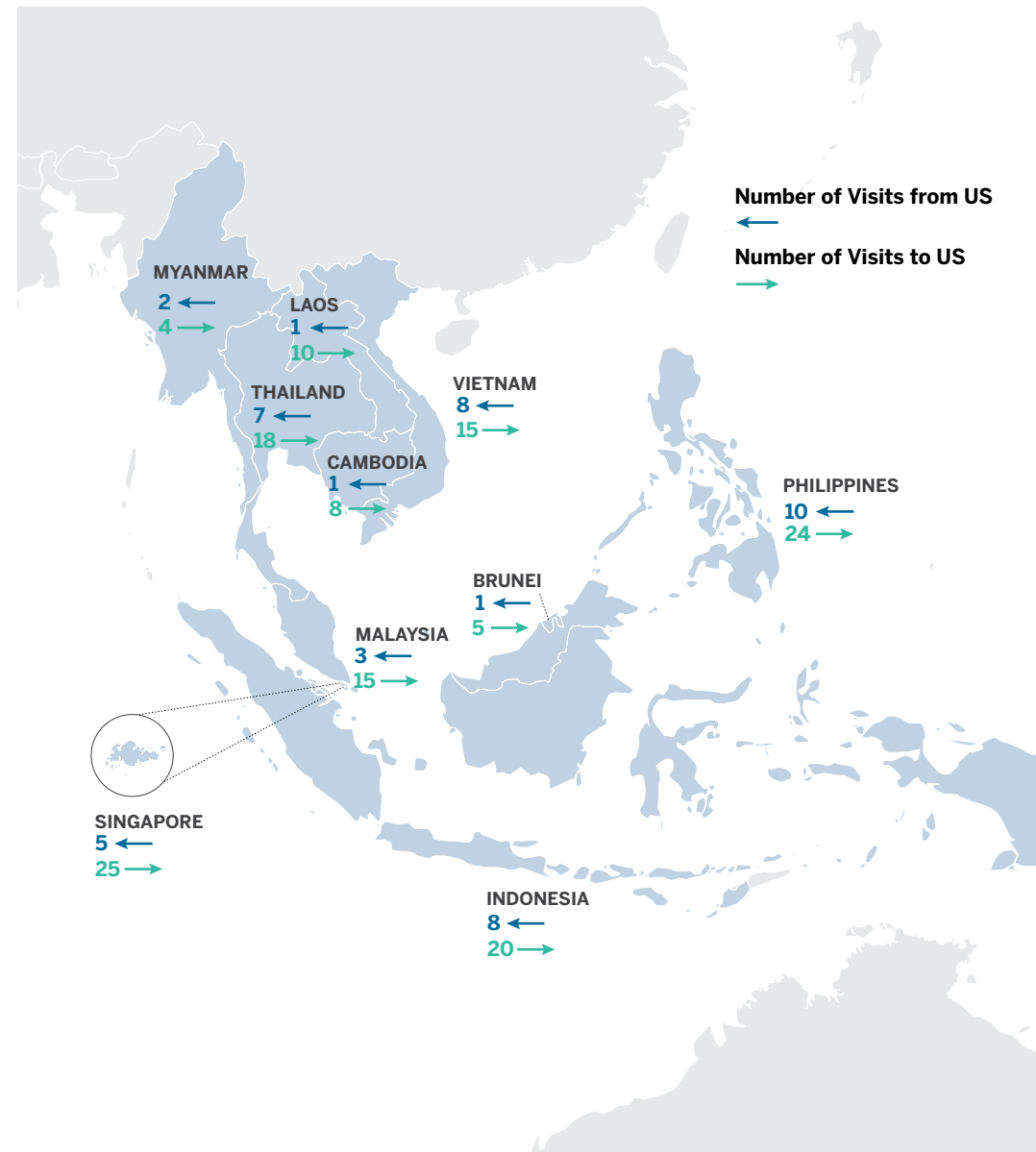
The United States is working with ASEAN member states on public health issues and development cooperation. The United States has already provided more than \$158 million in government assistance to fight COVID-19 in ASEAN member states. The COVID-19 pandemic has also exposed how fundamental health is to shared economic prosperity. In 2020 ASEAN's GDP contracted by 4.2%. Over the past 20 years, the United States has invested over \$3.5 billion in supporting public health in ASEAN. In 2019, the United States and ASEAN launched the US-ASEAN Health Futures initiative which aims to accelerate joint health research, strengthen health capacity across the region, and develop the next generation of human capital. The United States, through USAID, has also provided access to clean drinking water to over 5.6 million people and invested \$16 million in the One Health Workforce-Next Generation program to build a stronger multisectoral health workforce across the region. The United States and ASEAN have collaborated on more than 1,000 research projects over the last 10 years, including more than 300 active research projects in collaboration between ASEAN member states and over 20 institutes at the US National Institutes of Health.

US HEALTH AID TO ASEAN



HEADS OF STATE VISITS*

Total number of official visits by ASEAN Leaders to the United States and official visits by US Presidents to ASEAN Member States



*Only officially recognized heads of state/government are counted.
 Source Heads of State Map: US Department of State, Office of the Historian
 Source Health Aid: US Foreign Aid Explorer, FY2020 data

SECURITY COOPERATION

ASEAN is positioned as a critical geographic position straddling the sea lanes between the Indian Ocean to the west and the Pacific Ocean to the east. With over \$3.37 trillion in trade passing through the disputed waters of the South China Sea each year, including \$208 billion in US trade, maritime security is a priority for both the United States and ASEAN. The United States has supported regional efforts to increase security and awareness through trainings, workshops, and consultations within the frameworks of the ASEAN Regional Forum (ARF), the Expanded ASEAN Maritime Forum (EAMF), and the ASEAN Defense Ministers Meeting-Plus (ADMM-Plus).

The US government has worked to increase maritime security capacity in ASEAN through the Southeast Asia Maritime Law Enforcement Initiative, which was

MAJOR MILITARY EXERCISES

Annual and biennial exercises involving the United States and ASEAN member states



Sources Military Exercises: US Indo-Pacific Command, US Navy; US Army, Pacific; US Marine Corps Forces, Pacific
 Source Humanitarian Assistance and Disaster Relief: US Agency for International Development (USAID), Office of Foreign Disaster Assistance, FY2007-2017 data
 Additional Sources: Heritage Foundation, Index of US Military Strength

expanded in 2018, and the Indo-Pacific Maritime Security Initiative, which has provided more than \$250 million to enhance information sharing, interoperability, and maritime cooperation between the United States and ASEAN member states.

The US military participates in multilateral and bilateral military exercises with all 10 ASEAN member states. In 2019, the United States and ASEAN held their first Maritime Exercise (AUMX) in the South China Sea, and the Inaugural ASEAN-US Cyber Policy Dialogue in Singapore. As ASEAN is vulnerable to natural disasters such as typhoons, earthquakes, and tsunamis, the US military has contributed to Humanitarian Assistance and Disaster Relief (HADR) missions in the region, with support from across the US government as well as the private sector.

US-ASEAN SECURITY ALLIES AND PARTNERS

UNITED STATES AND PHILIPPINES	UNITED STATES AND THAILAND	UNITED STATES AND SINGAPORE
Major non-NATO Alliance	Major non-NATO Alliance	Enhanced Defense Cooperation Agreement

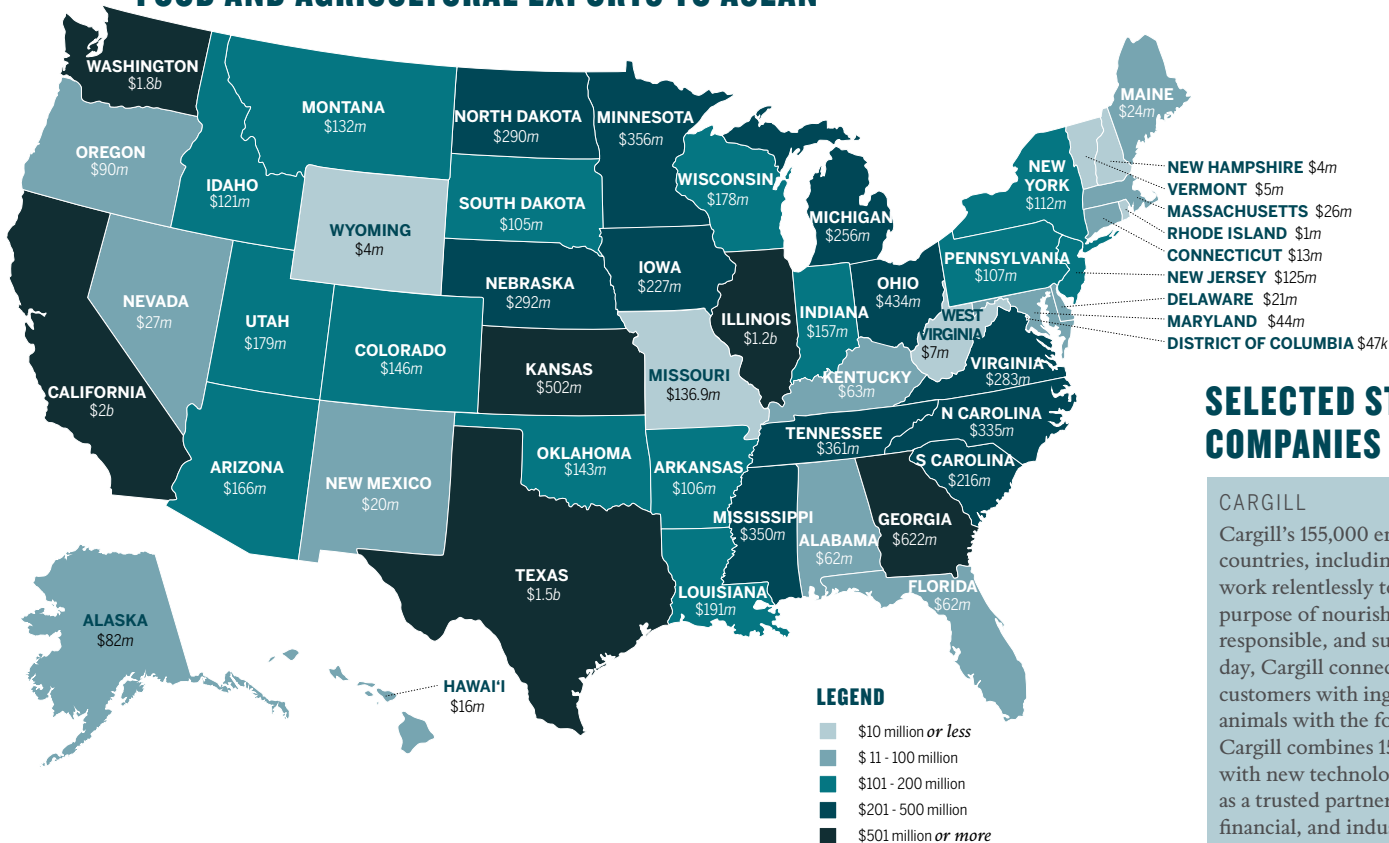
STATE NATIONAL GUARD PARTNERSHIPS

Cambodia – Idaho (since 2009) 	Indonesia – Hawai'i (since 2006)
Malaysia – Washington (since 2002) 	Philippines – Hawai'i (2000)
Thailand – Washington (2002) 	Vietnam – Oregon (2012)

ASEAN is a Top Five Destination for US Food and Agricultural Exports

The United States exports \$13.7 billion in food and agricultural goods to ASEAN, including over \$2 billion in soybeans and \$1.6 billion in cotton. ASEAN is the 4th largest global importer of US agricultural goods and the 2nd largest importer of US food and agricultural products in the Indo-Pacific after China. Thirty-two states export over \$100 million in food and agricultural goods to ASEAN, with California, Washington, Illinois, and Texas each exporting over \$1 billion.

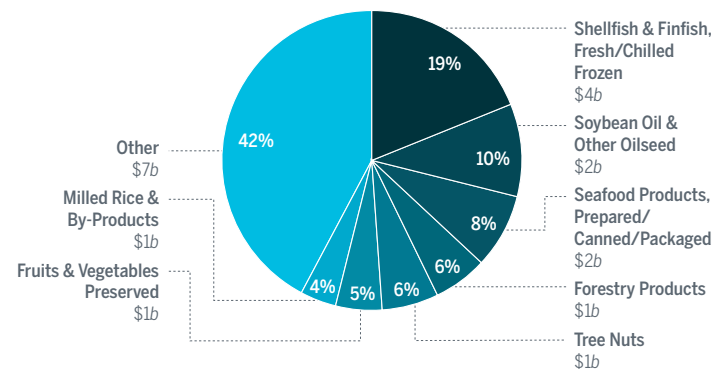
FOOD AND AGRICULTURAL EXPORTS TO ASEAN



Source US Map: Estimated by the Trade Partnership (Washington, DC), 2019 data using NAICS codes 111, 112, 311
 Source Pie Chart: US Census Bureau, 2019 data using NAICS codes 111, 112, 1132, 311, 3121
 Additional Sources: US Department of Agriculture, Food and Agriculture Organization of the United Nations

The top agricultural exports from ASEAN to the United States include shellfish/finfish & seafood products (\$5.2 billion), soybean oil (\$1.9 billion), and forestry products (\$1.2 billion). ASEAN is also the top global natural rubber and palm oil exporter, responsible for 84% and 86% of global production, respectively.

COMPOSITION OF ASEAN FOOD AND AGRICULTURAL EXPORTS TO THE UNITED STATES



SELECTED STORIES: US AGRICULTURE, FOOD AND BEVERAGE COMPANIES SUPPORT DEVELOPMENT IN ASEAN

CARGILL

Cargill's 155,000 employees across 70 countries, including over 40,000 in ASEAN, work relentlessly to achieve the shared purpose of nourishing the world in a safe, responsible, and sustainable way. Every day, Cargill connects farmers with markets, customers with ingredients, and people and animals with the food they need to thrive. Cargill combines 155 years of experience with new technologies and insights to serve as a trusted partner for food, agriculture, financial, and industrial customers in more than 125 countries. Side-by-side, they are building a stronger, sustainable future for agriculture.

COCA-COLA

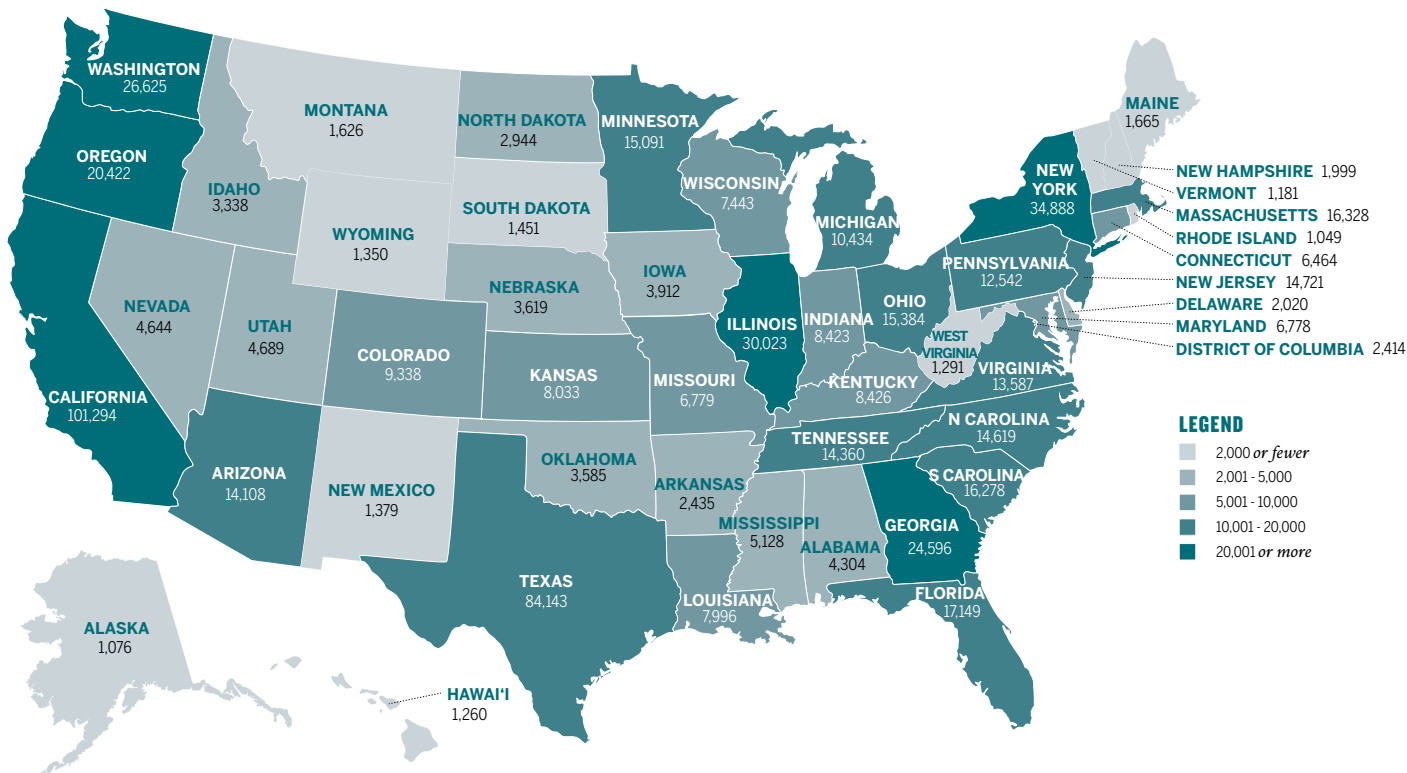
The Coca-Cola Company's heritage in ASEAN dates back more than 100 years from its early days distributing one brand, to today where it proudly operates as a total beverage company that manufactures across the region. For the reasons outlined in this publication, ASEAN remains a top growth opportunity for its business. The Coca-Cola Company looks forward to continuing to invest in the region for a better shared future through initiatives including improving recycling and reducing packaging waste, providing access to clean drinking water for communities, and economically empowering women and youth.

All 50 US States Export to ASEAN, Supporting More Than 625,000 US Jobs

Almost 42,000 companies across the United States export to ASEAN. These goods and services exports support, directly or indirectly, more than 625,000 US jobs. Nineteen states have more than 10,000 jobs that rely on exports to ASEAN member states. In 13 US states—Arizona, Georgia, Kansas, Mississippi, Montana, North Dakota, Tennessee, Texas, Virginia, Wyoming, Oregon, Idaho, and Maine—ASEAN accounts for more than 20% of export-dependent jobs to the Indo-Pacific.

In 2020, 21 states had over \$1 billion in goods exports to ASEAN. In per capita terms, trade with the 10 ASEAN member states creates the most jobs for Oregon, followed by North Dakota, Washington, the District of Columbia, South Carolina, Texas, and Kansas. Trade with ASEAN creates over a quarter of a million combined jobs in California, Texas, Washington, New York, and Illinois.

JOBS SUPPORTED BY EXPORTS TO ASEAN



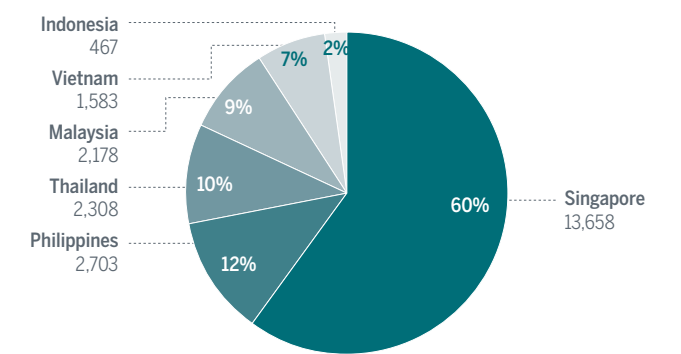
Greenfield investment* from six ASEAN member states has created an estimated 23,000 jobs in the United States since 2003. Over half of these jobs were created by Singapore-based companies.

Under the US-ASEAN Connect framework, the United States launched the US-ASEAN Internship Program in 2018 to provide opportunities for ASEAN students to gain work experience in US companies based in ASEAN member states, and has increased its engagement with ASEAN entrepreneurs, investors, and businesses through Connect Centers in Jakarta, Bangkok, and Singapore.

TOP 10 STATES

ASEAN AS A SHARE OF INDO-PACIFIC EXPORT-DEPENDENT JOBS		
1	Wyoming	36%
2	Idaho	26%
3	Georgia	24%
4	Mississippi	24%
5	Maine	23%
6	Arizona	23%
7	North Dakota	23%
8	Montana	22%
9	Oregon	22%
10	Tennessee	21%

JOBS FROM GREENFIELD INVESTMENT INTO THE UNITED STATES BY ASEAN COUNTRY



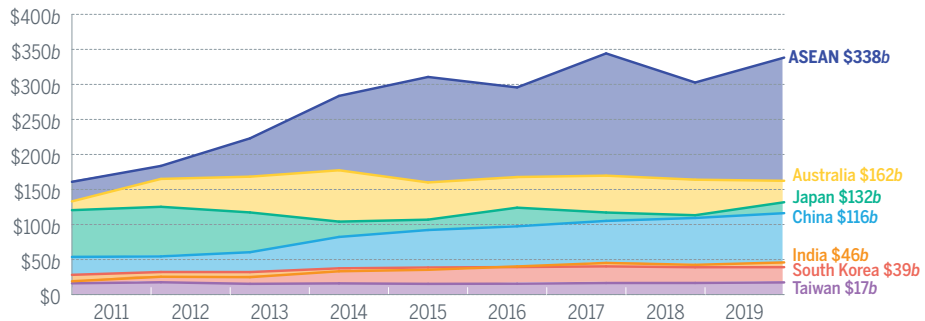
*Greenfield investment refers to the building or expansion of new facilities rather than purchases or merges with existing companies. Source Jobs from Trade: Estimated by the Trade Partnership (Washington, DC), 2019 data Source Jobs from Greenfield Investment: fDi Markets database, 2003-2020 data

ASEAN is the Number One Destination for US Investment in the Indo-Pacific

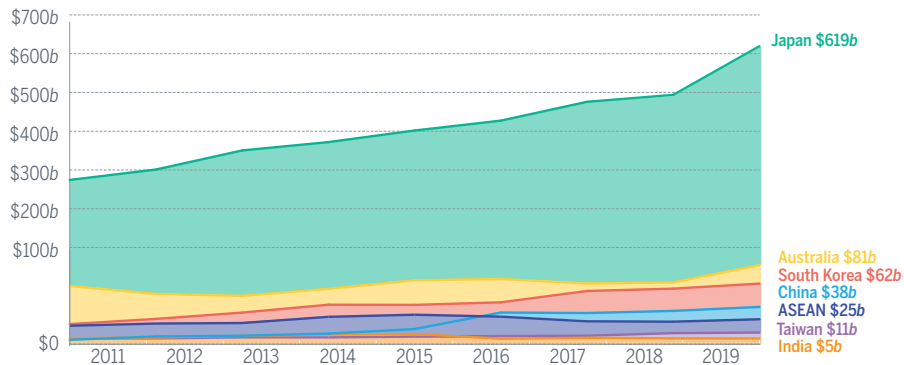
To date ASEAN has received almost \$338 billion in investment from the United States, more than the United States has directed to China*, India, Japan, and South Korea combined. US direct investment in ASEAN accounts for over one-third of US investment into the Indo-Pacific.

ASEAN member states have invested over \$24.9 billion into the United States. Singapore is the largest investor among ASEAN member states, with over \$21 billion invested, followed by Thailand (\$1.2 billion) and Malaysia (\$649 million). Since 2003, nearly \$8 billion has been invested in greenfield projects in 34 states and the District of Columbia.

US DIRECT INVESTMENT POSITION IN THE INDO-PACIFIC

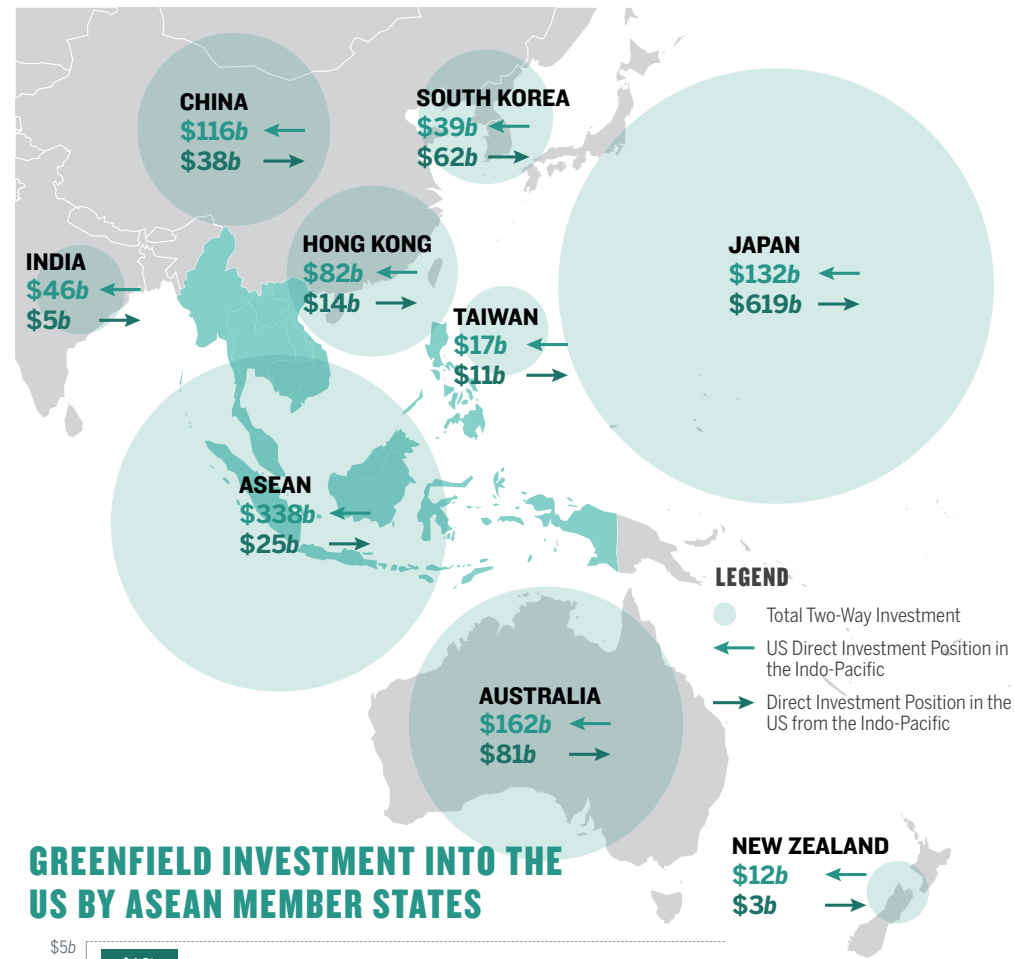


INDO-PACIFIC DIRECT INVESTMENT POSITION IN THE UNITED STATES

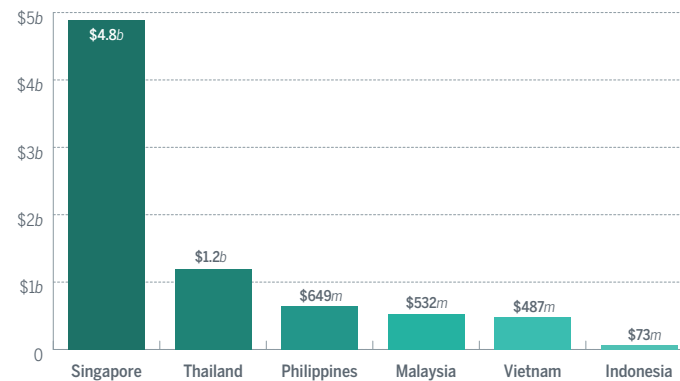


*Data for China does not include the Special Administrative Region of Hong Kong or Taiwan
 Source: US Bureau of Economic Analysis (BEA) Direct Investment Position on a Historical-Cost Basis, 2019 data, fDi Markets, from the Financial Times Ltd 2021

US-ASEAN DIRECT INVESTMENT POSITION IN A REGIONAL CONTEXT



GREENFIELD INVESTMENT INTO THE US BY ASEAN MEMBER STATES



CORPORATE INVESTMENT

More than 6,200 US companies operate in ASEAN. Many of these companies use ASEAN as a production platform to export within the region and to other parts of the world, leveraging ASEAN's free trade agreements with many other Indo-Pacific countries. US companies in ASEAN, many of whom operate in multiple ASEAN member states, create significant business linkages involving local suppliers and contractors in the region.

US COMPANIES IN ASEAN MEMBER STATES*



*Companies indicate US parent companies with subsidiaries in ASEAN member states as recognized by Uniworld. For more information on our methodology, please visit AsiaMattersforAmerica.org/sources-and-methodology

Source Map: Uniworld Business Publications (accessed February 2021)
Additional Sources: ASEAN Business Outlook Survey 2020, US Chamber of Commerce; Fortune; individual corporations

SELECTED STORIES

CHEVRON

Chevron is one of the world's leading integrated energy companies and a proud partner with countries in ASEAN, where it has had a presence for nearly a century. Chevron believes affordable, reliable, and ever-cleaner energy is essential to achieving a more prosperous and sustainable world. Chevron produces crude oil, natural gas, and LNG; manufactures transportation fuels, lubricants, petrochemicals, and additives; and develops technologies that advance a lower-carbon future for ASEAN and the world more broadly. Chevron values being both a regional and global leader in health, safety, and environmental performance.

VIATRIS

Viartis sees healthcare not as it is, but as it should be. Viartis in ASEAN is committed to empowering people to live healthier at every stage of life. To drive change, Viartis brings a combination of strengths and qualities to open up equal access to healthcare for every person, regardless of geography or circumstance. Fueled by genuine care and passion, Viartis in ASEAN works hand in hand with patients, healthcare practitioners, and local governments and partners to get the best treatments into people's hands at the right time – wherever they are.

MSD

MSD, a leading global biopharmaceutical company, has been inventing for life for 130 years, bringing forward medicines and vaccines for many of the world's most challenging diseases. MSD conducts business in the ASEAN region and examples are the regional headquarters, a translational medicine research center, an IT hub and a cutting-edge manufacturing site located in Singapore, as well as the regional finance function in Malaysia. Through MSD's presence in ASEAN, the innovative solutions that it provides and its efforts in biomedical research, MSD is committed to improving the lives of the patients in the ASEAN region.

AIG

AIG has a long history of serving customers across ASEAN and has remained a steadfast partner in the story of the region's economic growth and prosperity. An industry pioneer and trusted brand, AIG offers a wide range of general insurance products and services through a diversified distribution network. With offices throughout ASEAN, AIG has an established reputation as a leading insurer to businesses and individuals, protecting them in the moments that matter.

Infrastructure Development in ASEAN is One of the Top Priorities for Member States

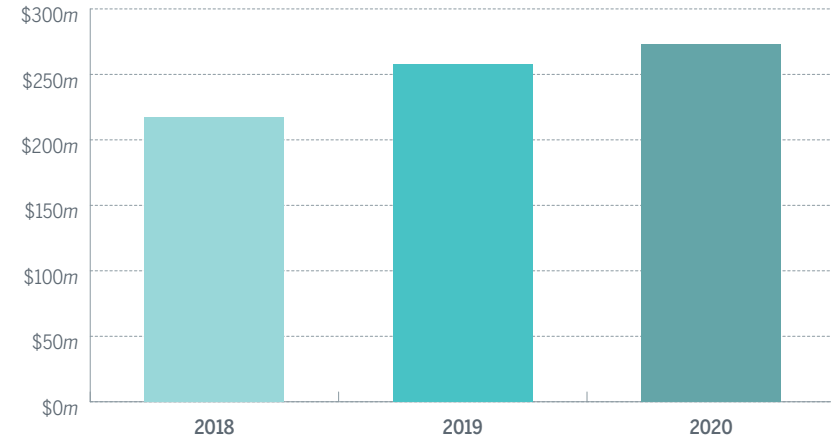
McKinsey has forecast the need for over \$2 trillion in investment in road, rail, port, airport, power, water, and telecommunications infrastructure across ASEAN to maintain the current levels of economic growth. The United States has multiple initiatives to support such infrastructure investment including the US-ASEAN Connect framework's Energy Connect pillar, which has pledged to invest in a five-year effort in ASEAN to increase the supply of grid-connected renewable energy. This investment includes at least 500MW of grid-tied renewable energy generation in the lower Mekong River countries of Cambodia, Laos, Thailand, and Vietnam. The US government's Asia EDGE has mobilized more than \$800 million in private and public investment to fund 11 renewable energy projects in Indonesia and supported Vietnam's growing solar energy market.

Additionally, the US International Development Finance Corporation (DFC) has invested more than \$1 billion to support projects in ASEAN countries, and aims to generate up to \$12 billion in new private sector investment by 2025. As of September 2020, there were 17 DFC projects in ASEAN, with over \$748 million in committed funds.

The US-ASEAN Smart Cities Partnership (USASCP) promotes US private sector engagement in ASEAN to create smart, sustainable city solutions; shares best practices and encourages technical collaboration between US and ASEAN industry, municipal, and academic leaders; and strengthens the digital economy and cybersecurity capabilities of ASEAN cities. Programs have been implemented in various sectors, including transportation, water, trade, and technological innovation. In January 2020, US-ASEAN Water Smart Engagements (WiSE) paired three ASEAN Smart Cities Network cities with three US cities in a three-year program, during which both parties will engage in collective capacity building and innovative technology familiarization in water security.

Sources: US International Development Finance Corporation, 2020 Annual Report; US-ASEAN Smart Cities Partnership (usascp.org); McKinsey Global Institute ("Rule of Thumb" Need estimation based on 71% stock level), 2016-2030 projection

US INTERNATIONAL DEVELOPMENT FINANCE CORPORATION FUNDING IN ASEAN MEMBER STATES



US-ASEAN SMART CITIES WATER SMART ENGAGEMENTS (WiSE) PARTNERS

MILWAUKEE, WISCONSIN	SAN FRANCISCO, CALIFORNIA	WASHINGTON, DC
Phuket, Thailand	Ho Chi Minh City, Vietnam	Johor Bahru, Malaysia
 	 	 

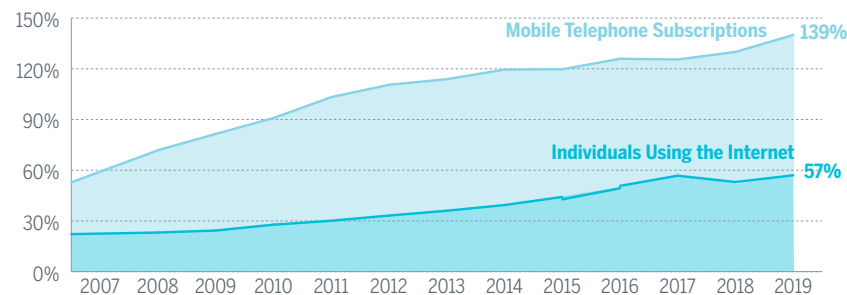
ASEAN's Digital Economy is Projected to Exceed \$300 Billion by 2025

ASEAN is the world's fastest-growing internet market with over 400 million active internet connections, and growing at a double-digit pace. The region is predominantly mobile-first, with over 90% of its internet users connected via smartphone and 915 million active mobile connections, nearly 1.5 times its population. Online spending is expected to more than triple to \$300 billion by 2025, fueled by e-commerce, ride hailing apps, online media, and an increasingly innovative online marketplace in part due to the COVID-19 pandemic.

There is ample room for ASEAN to grow its digital economy because of its many policy frameworks and because of how the region is also becoming a source of digital economy "innovation." ASEAN has developed policy frameworks to realize a more interconnected and inclusive digital economy, including the AEC Blueprint 2025, Masterplan on ASEAN Connectivity 2025, and the e-ASEAN Framework Agreement. The World Economic Forum's Digital ASEAN Initiative also works collaboratively with regional partners and the ASEAN Secretariat to create a pan-ASEAN data policy, build digital skills in the ASEAN workforce, create a common ASEAN e-payment framework, and nurture ASEAN cybersecurity cooperation and capacity building.

INTERNET PENETRATION AND MOBILE SUBSCRIPTIONS IN ASEAN

Mobile penetration outpaces traditional internet access across the region

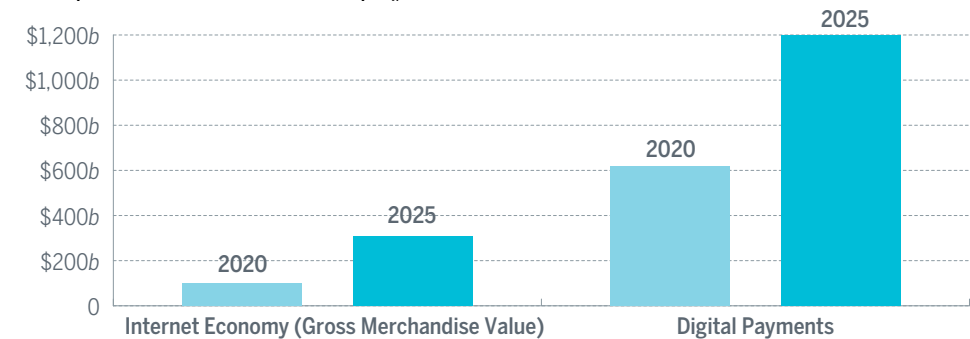


Source Internet Penetration: International Telecommunications Union (ITU), ASEAN Statistical Yearbook 2020; Source Merchandise and Digital Payments: e-Conomy SEA 2020 (Data limited to Indonesia, Malaysia, Philippines, Singapore, Thailand, and Vietnam)

US digital companies in the region are among the top mobile vendors (Apple, 23% market share), search engines (Google, 96%), and social media platforms (Facebook, 65%), edging out Chinese competitors. The US government and businesses have also provided support to over 120,000 ASEAN entrepreneurs since 2011 through various programs, including the US-ASEAN Business Alliance for Competitive SMEs and the online ASEAN SME Academy.

INTERNET ECONOMY AND DIGITAL PAYMENTS IN ASEAN

Comparison between 2020 and projected 2025



SELECTED STORIES: BUILDING ENTREPRENEURIAL EXPERTISE



Photo: US-ASEAN Business Council

GOOGLE

Backed by funding from Google.org and support from the ASEAN Coordinating Committee on Micro, Small and Medium Enterprises (ACCMSME), The Asia Foundation announced a new grassroots program that will bring skills training to 200,000 people in marginalized communities across Southeast Asia. Through the Go Digital ASEAN initiative, MSMEs and underemployed youth across the region will learn how to better utilize the internet and relevant digital tools to grow their businesses and reduce vulnerability against cyber threats amidst the COVID-19 crisis. Training will be customized to local conditions and will cover modules such as digital marketing, business development, and online safety to enable participants to access the most relevant tools and skills to help them improve their livelihoods in the digital economy.

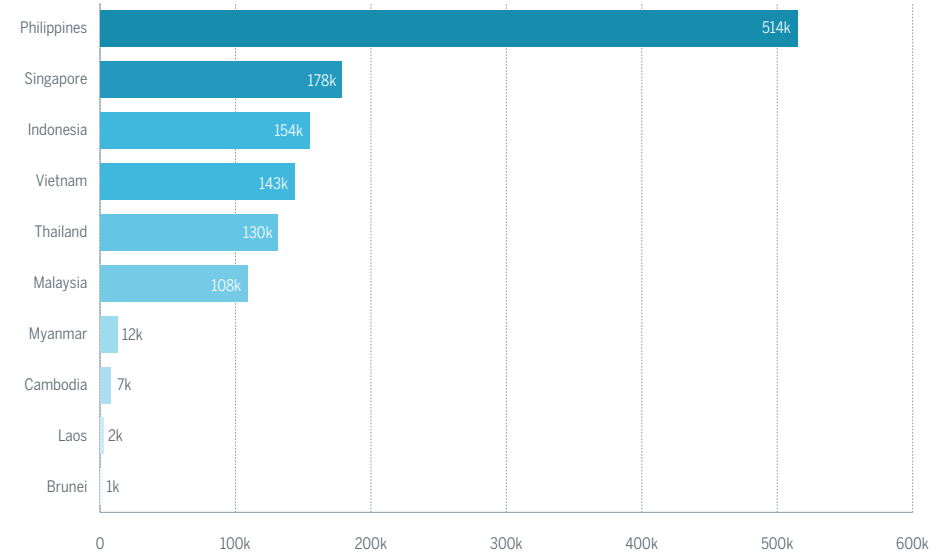
Visitors from ASEAN Add Nearly \$8 Billion to the US Economy Annually

In 2019, nearly 1.3 million people from ASEAN countries visited the United States, while over 4.8 million Americans visited ASEAN. It is estimated that international travel fell by over 70% globally due to the COVID-19 pandemic, with the Indo-Pacific being the hardest hit location for tourism. Thailand, the Philippines, Vietnam, and Singapore are the top four destinations in ASEAN, with over 3.7 million annual visitors from the United States combined. US airlines serve cities in all four of these countries.

VISITORS FROM THE UNITED STATES TO ASEAN



ASEAN VISITORS TO THE UNITED STATES BY COUNTRY



TOP 10 STATES

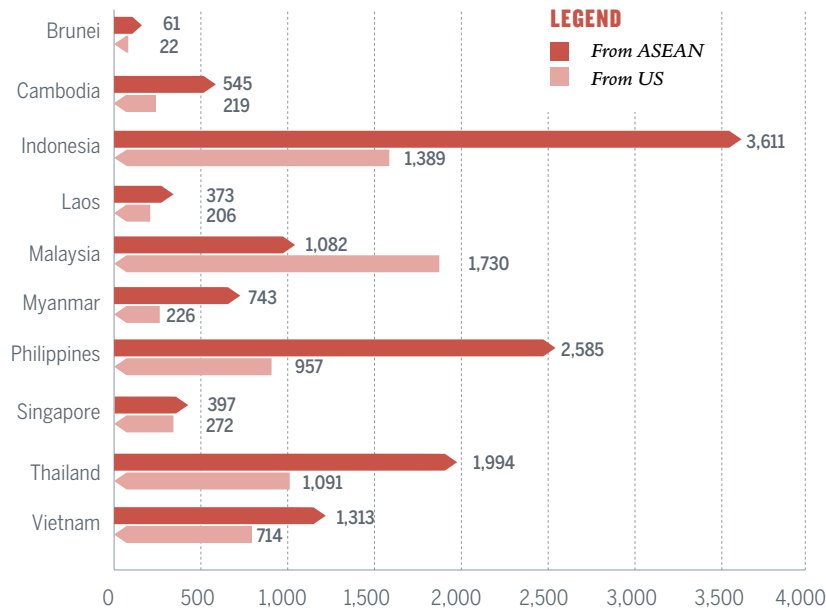
ASEAN VISITOR SPENDING IN THE US		
1	California	\$1.4b
2	New York	\$714m
3	Texas	\$618m
4	Florida	\$518m
5	Illinois	\$357m
6	Georgia	\$317m
7	Massachusetts	\$270m
8	Washington	\$244m
9	New Jersey	\$202m
10	Nevada	\$183m

Source Visitors from US: Cambodia Ministry of Tourism, Statistics Indonesia, Lao Tourism Development Department, Tourism Malaysia, Myanmar Ministry of Hotels & Tourism, Philippines Department of Tourism, Singapore Tourism Board, Thai Ministry of Tourism & Sports, Viet Nam National Administration of Tourism, UN World Tourism Organization, 2019 data
 Source Visitor Spending: Estimated by the Trade Partnership (Washington, DC), 2019 data
 Source Visitors from ASEAN to the US: US Customs and Border Patrol, 2019 data

FULBRIGHT PROGRAM

More than 650 students, teachers, and scholars participate in Fulbright exchanges between the United States and ASEAN. Participants from all 10 ASEAN member states take part in the program. Since the program's founding in 1949, over 12,700 students, teachers, and scholars from ASEAN have participated, including over 3,600 from Indonesia and over 2,500 from the Philippines. Since 1949, there have been over 6,800 American Fulbright participants, with the greatest number engaged in the Indonesia, Malaysia, and Thailand programs.

FULBRIGHT PARTICIPANTS SINCE 1949



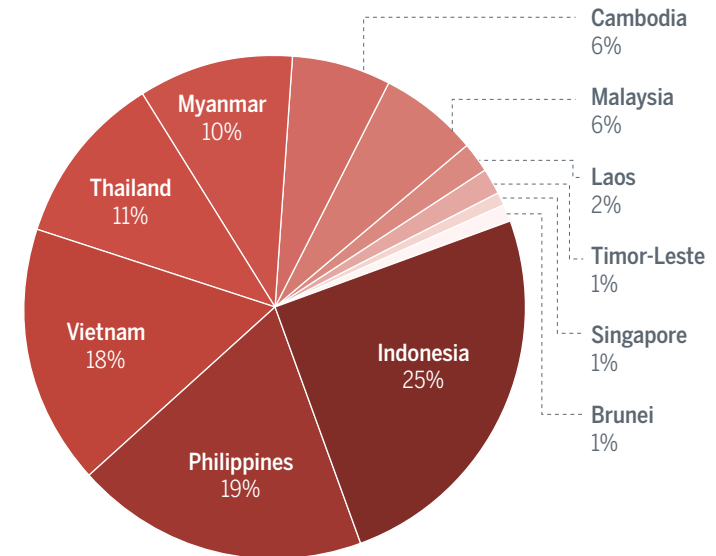
Source Fulbright: US Department of State, Bureau of Education and Cultural Affairs, 1949-2020
 Source YSEALI: US Department of State, US Mission to ASEAN (as of April 2021)

YOUNG SOUTHEAST ASIAN LEADERS INITIATIVE (YSEALI)

YSEALI is the US government's signature program to educate and provide skills training to the people of Southeast Asia. YSEALI is open to young people from all ASEAN member countries and Timor-Leste. Since 2013, YSEALI has offered exchanges, regional workshops, small grant funding, and other programs to develop ties between the United States and ASEAN. The YSEALI professional and academic fellowships, for example, connect young Southeast Asian leaders with US universities, businesses, and non-profits. YSEALI programs have more than 6,000 alumni, and more than 150,000 young people belong to the YSEALI Network.

At the September 2020 ASEAN-US Foreign Ministers' Meeting, the United States announced the new YSEALI Academy at Fulbright University in Vietnam to expand YSEALI's people-to-people engagement between the United States and ASEAN.

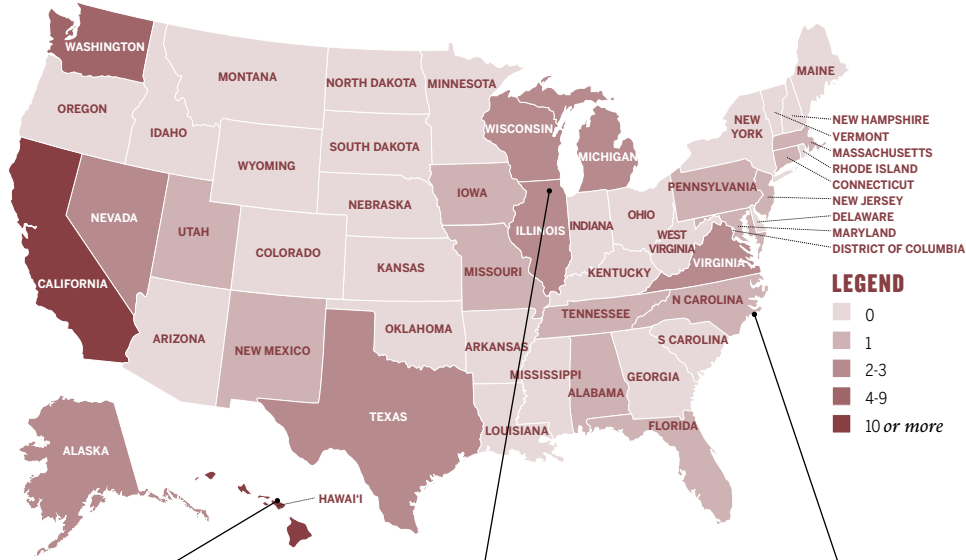
YSEALI PARTICIPATION BY COUNTRY



110 Sister Relationships between the United States and ASEAN Build People-to-People and Commercial Connections

Sister relationships are local partnerships between cities, counties, provinces, and states with similar jurisdictions. These relationships build ties between communities and support personal, commercial, and cultural initiatives. Seven ASEAN member states link to 23 US states and the District of Columbia through 81 sister city, nine sister state, and 20 sister county connections.

US SISTER RELATIONSHIPS WITH ASEAN



Maui County in Hawai'i has the most sister relationships in ASEAN of any US city with 12 sister relationships.

Elgin, Illinois is the only US city to share a sister relationship with a city in Laos.

Beaufort, North Carolina enjoys a sister city relationship with Beaufort, Malaysia.

US	ASEAN
Mobile, AL	Bolinao, PH
Juneau, AK	Camiling, PH
Juneau, AK	Kalibo, Aklan, PH
Alameda, CA	Dumaguete, PH
Berkeley, CA	Uma-Bawang, MY
Carson, CA	La Carlota, PH
Carson, CA	Parañaque, PH
Chula Vista, CA	Cebu City, PH

US	ASEAN
Newport Beach, CA	Vung Tau Ba Ria City, VN
Oakland, CA	Da Nang, VN
Orinda, CA	Lanphun, TH
Palo Alto, CA	Palo, PH
Sacramento, CA	Manila, PH

LEGEND
 Cambodia - KH; Indonesia - ID; Laos - LA;
 Malaysia - MY; Philippines - PH; Thailand - TH;
 Vietnam - VN

US	ASEAN
Sacramento, CA	Pasay, PH
San Bernardino, CA	Roxas, PH
Long Beach, CA	Bacolod, PH
Long Beach, CA	Phnom Penh, KH
Los Angeles, CA	Jakarta, ID
Los Angeles, CA	Makati, PH
Milpitas, CA	Dagupan City, PH
Riverside, CA	Can Tho, VN
San Diego, CA	Cavite City, PH

ASEAN SISTER RELATIONSHIPS WITH THE UNITED STATES



No cities in Myanmar have a sister relationship with a US city, but Fort Wayne, Indiana has a friendship relationship with Mawlamyine, Myanmar.

The Philippines has the most sister relationships with the United States of all ASEAN member states at 81.

US	ASEAN	US	ASEAN	US	ASEAN
San Francisco, CA	Ho Chi Minh City, VN	Honolulu, HI	Cebu, PH	State of Iowa	State of Terengganu, MY
San Francisco, CA	Manila, PH	Honolulu, HI	Hue, VN	State of Maryland	Ninh Thuan Province, VN
Santa Barbara, CA	San Juan, PH	Honolulu, HI	Laoag City, PH	Lowell, MA	Phnom Penh, KH
Santa Clarita, CA	Sariaya, PH	Honolulu, HI	Manila, PH	Sterling Heights, MI	Legazpi City, PH
South San Francisco, CA	Pasig City, PH	Honolulu, HI	Vigan, PH	Sterling Heights, MI	Sorsogon City, PH
Stockton, CA	Battambang, KH	Honolulu, HI	Mandaluyong, PH	St. Louis, MO	Bogor, ID
Stockton, CA	Iloilo, PH	Maui County, HI	Bacarra City, PH	Jersey City, NJ	General Santos City, PH
Union City, CA	Baybay, PH	Maui County, HI	Badoc, PH	Reno, NV	Udonthani, TH
Union City, CA	Chiang Rai, TH	Maui County, HI	Cabugao, PH	Angel Fire, NM	Quang Tri Town, VN
Union City, CA	Pasay City, PH	Maui County, HI	Manila, PH	Beaufort, NC	Beaufort, MY
Vallejo, CA	Baguio, PH	Maui County, HI	Puerto Princesa, PH	Pittsburgh, PA	Da Nang, VN
Walnut, CA	Calamba, PH	Maui County, HI	Quezon City, PH	Fort Worth, TX	Bandung, ID
New Haven, CT	Hue City, VN	Maui County, HI	Santa & San Juan, PH	Salt Lake City, UT	Quezon City, PH
Washington, DC	Bangkok, TH	Maui County, HI	Sarrat, PH	Norfolk, VA	Cagayan de Oro, PH
State of Hawai'i	Cebu Province, PH	Maui County, HI	Zambales Province, PH	Virginia Beach, VA	Olongapo, PH
State of Hawai'i	Ilocos Norte Province, PH	Kauai County, HI	Davao City, PH	Lakewood, WA	Bauang, PH
State of Hawai'i	Ilocos Sur Province, PH	Kauai County, HI	Bangue, PH	Seattle, WA	Cebu City, PH
State of Hawai'i	Isabela Province, PH	Kauai County, HI	Urdaneta, PH	Seattle, WA	Hai Phong, VN
State of Hawai'i	Pangasinan Province, PH	Kauai County, HI	Abra, PH	Seattle, WA	Sihanoukville, KH
Hawai'i County, HI	Ormoc City, PH	Kauai County, HI	Pangasinan, PH	Seattle, WA	Surabaya, ID
Honolulu, HI	Baguio, PH	Kauai County, HI	Laoag City, PH	Tacoma, WA	Davao, PH
Honolulu, HI	Candon City, PH	Elgin, IL	Vientiane, LA	Kenosha, WI	Quezon City, PH
				Milwaukee, WI	Medan, ID

Sources: Sister Cities International, 2020 data; individual sister city associations

ASEAN MATTERS FOR AMERICA/AMERICA MATTERS FOR ASEAN

US-ASEAN Business Council members contributed toward this initiative.



This project explores the important and multi-faceted relationship between the United States and the Association of Southeast Asian Nations (ASEAN). Part of the *Asia Matters for America* initiative, this publication and its corresponding website AsiaMattersforAmerica.org/ASEAN provide tools for a global audience to explore the increasing significance of the US-ASEAN relationship in the 21st century.

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