ASEAN
Key Figures 2025

one vision
one identity
one community

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, Timor-Leste and Viet Nam

The ASEAN Secretariat is based in Jakarta, Indonesia.

ISSN 2986-3619

9 772986 361000

ASEAN: A Community of Opportunities for All

Illustration credits: www.shuterstock.com, all-free-download.com

Map in this publication is only indicative and is not drawn to scale.

General information on ASEAN appears online at the ASEAN Website: www.asean.org.

ASEAN Key Figures 2025

The ASEAN Secretariat

2025

FOREWORD

The Association of Southeast Asian Nations (ASEAN) continues to evolve as a dynamic and increasingly cohesive regional community, recently strengthened by the formal accession of Timor-Leste as its eleventh Member State. As the region works toward realising the aspirations outlined in ASEAN Vision 2045 amid an increasingly complex and rapidly changing global environment, the demand for robust, timely, and reliable statistics has never been greater. High-quality official statistics form the essential foundation for effective monitoring, evidence-based policymaking, and deeper regional cooperation.

The ASEAN Key Figures 2025 provides a valuable resource for understanding the region's diverse and evolving development trajectory. This publication presents a comprehensive overview of ASEAN's progress across three critical dimensions: people and welfare, the economy, and environment and natural resources. Through clear explanations and engaging visual presentations, each chapter illuminates key trends and developments, offering readers insight into the forces shaping ASEAN's regional dynamics.

It is my hope that this publication will serve as an essential tool for policymakers, researchers, and stakeholders, supporting regional and global efforts towards sustainable development, inclusive growth, and ASEAN's shared vision of a resilient and prosperous future.

DR. KAO KIM HOURN
Secretary-General of ASEAN

TABLE OF CONTENTS

LIST OF FIGURES

INTRODUCTION

The ASEAN Key Figures (AKF) 2025 offers a clear and compelling snapshot of ASEAN's economic, social, demographic, and environmental progress. With Timor-Leste's formal accession as the 11th ASEAN Member State, this year edition marks a new milestone, expanding its statistical coverage to include available data from Timor-Leste. This addition strengthens the publication's value as a concise yet comprehensive resource that offers clear, reliable, and insightful perspectives on ASEAN's regional development.

Designed for policymakers, researchers, and the general public alike, AKF 2025 serves as an essential guide to understanding ASEAN's evolving landscape and emerging development trends.

This publication is structured into three chapters, each highlighting a major dimension of ASEAN's development:

1. **Population and Welfare**
    This chapter presents key indicators on population, education, healthcare, and labor markets. Together, these statistics offer an integrated view of the region's social conditions and human development progress across ASEAN.

2. **Economy**
    Focusing on ASEAN's economic performance, this chapter covers GDP, international trade in goods and services, foreign direct investment, and visitor arrivals. It sheds light on the region's growth trajectory, its interconnected trade networks, and its continuing appeal within the global economy.

3. **Environment and Natural Resources**
    This chapter explores indicators related to transport, energy, agriculture, and forestry. The data provide insight into how ASEAN manages its natural resources and addresses environmental challenges as part of its broader development agenda.

All data featured in AKF 2025 is drawn from the ASEANstats database, reflecting updates available as of 1 December 2025. Additional statistics and more detailed information are available on the ASEANstats website. This publication, as well as the **ASEAN Statistical Highlights**, can be accessed online at www.aseanstats.org.

Population and Welfare

1. POPULATION AND WELFARE

1.1. POPULATION

The evolving population landscape of ASEAN, which is shaped by shifts in demographic patterns, including fertility, mortality, and age composition, reflects the region's dynamic socio-economic progress and diverse development pathways. Understanding these patterns is essential for crafting policies that address emerging challenges, such as ensuring the life quality of aging population, enhancing health system, and managing labour market shifts.

Population: size and structure

In 2024, the combined population of the eleven ASEAN Member States (AMS) reached 684.1 million, representing 8.4 percent of the global population and maintaining the position as the third most populous region in the world, following India and China. Over the

Figure 1.1.1. Population size (million persons) and growth rate (%), ASEAN total, 1980-2024
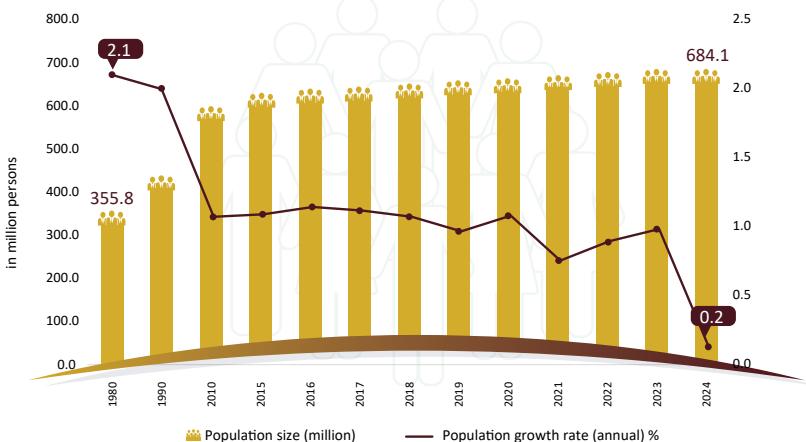
Source: ASEAN Secretariat, ASEANstats database

past four decades, the region's population had nearly doubled from 355.2 million in 1980, reflecting its remarkable demographic growth and development. However, the annual population growth rate had slowed significantly, from 2.1 percent in 1980 to 0.2 percent in 2024. The downward trend in the ASEAN population growth rate is reflected in Figure 1.1.1.

The ASEAN population pyramids presented in Figure 1.1.2 underscore the region's demographic transition from a predominantly young and rapidly expanding population in 2005 to a more balanced and mature age structure in 2024.

The ASEAN population in 2024 shows a more rectangular pyramid shape compared to the traditional triangular shape in 2005, reflecting the region's transition toward an aging but economically active society. The distributions of males and females were generally

Figure 1.1.2. Population pyramid[1] (% of total), ASEAN total, 2005 and 2024
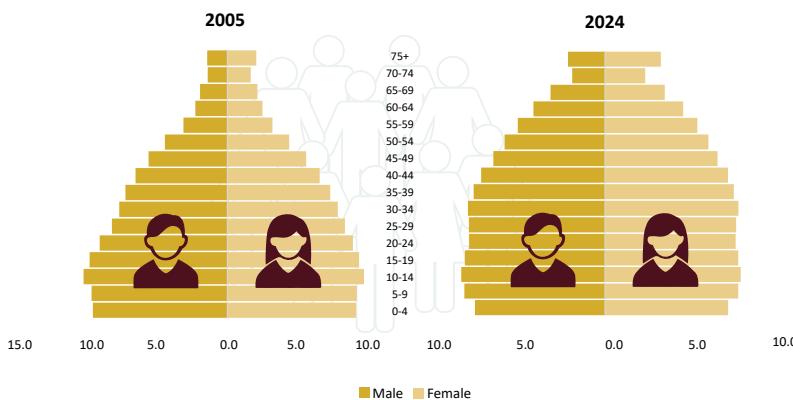
Source : ASEAN Secretariat, ASEANstats database

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

balanced across most age groups. However, in 2024, females outnumbered males in the older age cohorts, reflecting the longer life expectancy of women observed across AMS as discussed later in this chapter.

The more detailed ASEAN population by age structure across AMS is reflected in Figure 1.1.3. It shows that between 2005 to 2024, the proportion of the population aged 65 years and over increased from around 5.4% to 8.2%. Notably, Singapore (18%) and Thailand (14%) recorded the highest proportion of elderly persons, reflecting their more advanced demographic transition toward an aging population compared to other Member States.

Meanwhile, the productive working-age population (20–59 years) remained the largest age group, accounting for around 56% of ASEAN's total population in 2024. Countries such as Brunei Darussalam, Indonesia, Malaysia, Singapore, Thailand

Figure 1.1.3. Population age structure (% of total) by ASEAN Member States, 2005 and 2024
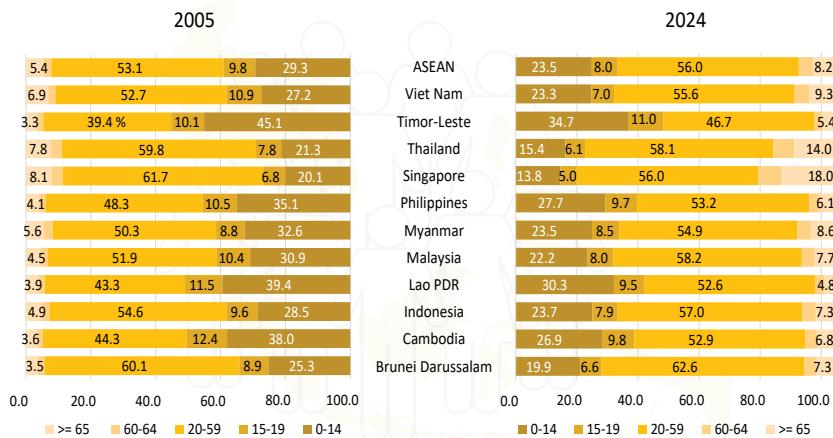
Source : ASEAN Secretariat, ASEANstats database

and Viet Nam recorded relatively higher shares than the ASEAN average for this group, reflecting the region's strong productivity potential. In contrast, Cambodia, Lao PDR, the Philippines and Timor-Leste continued to have a larger youth population (age 0−19 years), indicating a younger demographic structure and continued opportunities for employment creation and skills development as these cohorts gradually enter the working-age population in the coming years.

Fertility

Total fertility rate (TFR) remains a key indicator of population growth, representing the average number of children a woman would have over her reproductive years, if current age-specific fertility rates persisted. A TFR of approximately 2.1 children per woman is generally considered the replacement level, sufficient to maintain population stability in the absence of migration or significant changes in mortality. A TFR below 2.1 indicates that, without migration, the population is likely to decline over time, while a TFR above 2.1 suggests that the population would grow, assuming other demographic factors remain constant.

Figure 1.1.4 illustrates that fertility trends across AMS remained diverse, with several AMS recorded low fertility levels far below the replacement threshold. Singapore and Thailand, with TFRs of 1.0 in 2024 and 1.1 in 2022 respectively, exhibited very low fertility, reflecting sustained below-replacement levels that may lead to gradual population decline over time. The Philippines also experienced a notable decrease, from 3.0 in 2015 to 1.9 in 2024, while Brunei Darussalam recorded a modest decline to 1.5 in 2024. With TFRs of 1.6 and 1.9, Malaysia and Viet Nam gradually declined below replacement-level fertility. Countries experiencing TFRs below the replacement threshold may encounter sustained demographic

pressures, including an older population and declining labor force participation, leading to increased demands on health and social support systems.

In contrast, several AMS maintained fertility at or above replacement levels, including Indonesia (2.1), Myanmar (2.4), Lao PDR (2.4), Cambodia (2.4) and Timor-Leste (3.4). With relatively young populations, these countries can expand their labour force and benefit from a demographic advantage. Nevertheless, higher fertility also presents challenges, making it essential to invest consistently in education, healthcare, and child-focused services so that population growth contributes positively to human capital.

Figure 1.1.4. Total Fertility Rates (TFR) by ASEAN Member States, 2015 and 2024

Country	2024	2015
Brunei Darussalam	1.5	1.8
Cambodia	2.4	2.6
Indonesia	2.1	2.2
Lao PDR	2.4	2.9
Malaysia	1.6	2.0
Myanmar	2.4	2.5
Philippines	1.9	3.0
Singapore	1.0	1.2
Thailand	1.1	1.4
Timor-Leste	3.4	4.2
Viet Nam	1.9	2.1

■ 2015   ■ 2024
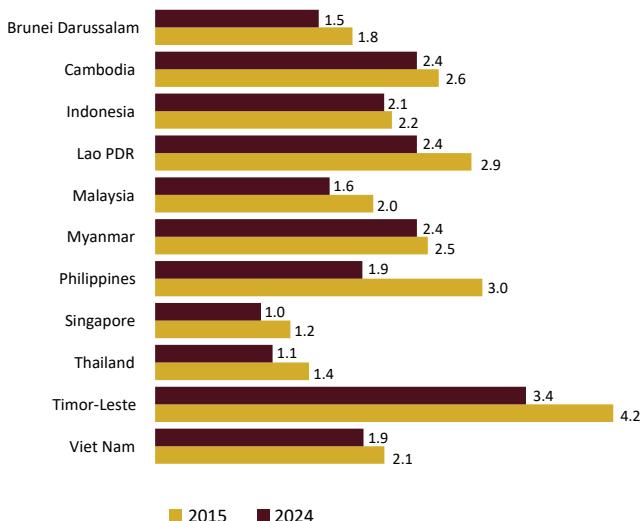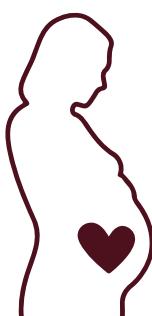
Notes   :   1. The latest available data for Cambodia, Myanmar, Philippines and Thailand is 2022; Timor-Leste is 2023
2. Data for Timor-Leste refers to woman aged 15-49 years
Source: ASEAN Secretariat, ASEANstats database

Mortality and Life Expectancy

Mortality, together with fertility and migration, shapes overall population dynamics. The infant mortality rate and under-five mortality rate, in particular, are widely used to highlight children's well-being and to assess how accessible and effective healthcare services are. 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.

Infant mortality trends across AMS show different levels of progress in child health, as illustrated in Figure 1.1.5. Singapore maintained the lowest infant mortality rate in the region but increased slightly from 1.7 deaths per 1,000 live births in 2015 to 2.3 in 2024. Brunei Darussalam recorded a significant rise from 8.8 deaths to 11.4 deaths per 1,000 live births over the same period, while Malaysia experienced a modest increase from 6.9 deaths in 2015 to 7.2 deaths per 1,000 live births in 2024.

Figure 1.1.5. Infant mortality rate per 1,000 live births, 2015 and 2024
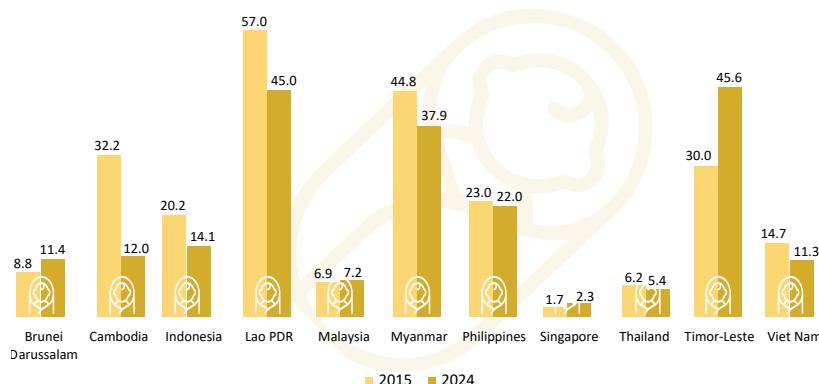
Note   :   The latest available data for Cambodia is 2021, Myanmar and Philippines is 2022, Thailand is 2023
Source: ASEAN Secretariat, ASEANstats database

Furthermore, Timor-Leste recorded a substantial increase, with its infant mortality rate increased from 30 deaths per 1,000 live births in 2015 to 45.6 deaths in 2023, suggesting the need for continued attention to maternal and child health interventions.

Meanwhile, several other AMS have sustained downward trends, reflecting the effectiveness of long-term public health efforts. Infant mortality rate in Cambodia decreased from 32.2 deaths per 1,000 live births in 2015 to 12.0 deaths in 2021, followed by Indonesia from 20.2 deaths in 2015 to 14.1 deaths in 2024, the Philippines from 23.0 deaths in 2015 to 22.0 deaths in 2024, Thailand from 6.2 deaths in 2015 to 5.4 deaths in 2023 and Viet Nam from 14.7 deaths in 2015 to 11.3 deaths in 2024, respectively. Myanmar, however, continued to face challenges, with the rate remained high at 37.9 deaths per 1,000 live births in 2022 despite a modest improvement from 44.0 deaths in 2015. Similarly, Lao PDR also reported a high rate of 45.0 deaths in 2024, despite progress in reducing infant deaths from 57 deaths in 2015.

Another key indicator on mortality is the under-five mortality rate, which is defined as the probability of a newborn would die before reaching exactly 5 years of age, expressed per 1,000 live births. Over the past four decades, the under-five mortality rate in ASEAN had decreased significantly, driven by expanded immunisation coverage, improved maternal and neonatal care, and better access to healthcare services. The most significant progress took place over the last decade, with the rate falling from 32.6 deaths per 1,000 live births in 2010 to 20.9 in 2024, reflecting the positive impact of regional and national initiatives. As illustrated in Figure 1.1.6, ASEAN had successfully achieved the Sustainable Development Goals (SDGs) target of reducing under-five mortality to at least 25 deaths per 1,000 live births by 2030, highlighting the region's sustained progress toward ensuring child survival and well-being.

Figure 1.1.6. Under-five mortality rates (per 1,000 live births), ASEAN total, 1985-2024
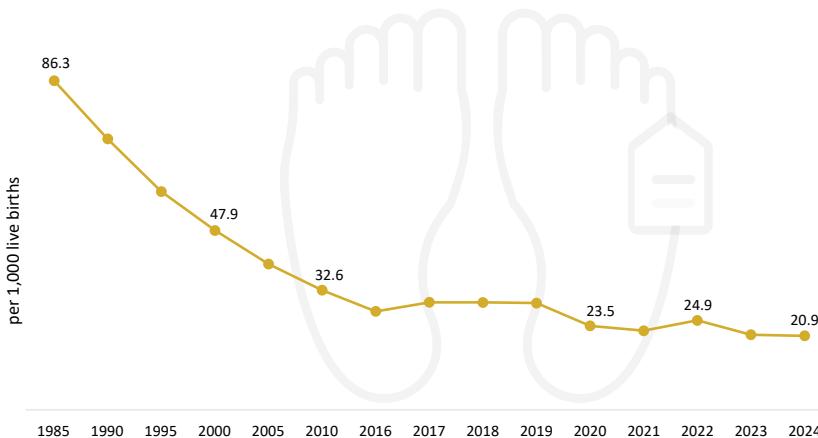
While ASEAN as a region made strong progress in improving child survival, the pace varied across countries. In 2024, several AMS, including Cambodia, Indonesia, Malaysia, Singapore, Thailand and Viet Nam, had already achieved the SDG target of keeping under-five mortality below 25 deaths per 1,000 live births. Singapore reported the lowest rate at 2.8 deaths per 1,000 live births, followed by Thailand at 7.4 deaths and Malaysia at 8.3 deaths. Brunei Darussalam also recorded a relatively low rate of around 14.0 deaths per 1,000 live births, while Cambodia, Viet Nam, and Indonesia reported 16.0, 17.4, and 19.8 deaths, respectively. These figures demonstrate continued progress in healthcare access, maternal and child health services, and overall living conditions across much of the region.

However, slower progress was recorded in other AMS. Lao PDR, Timor-Leste and Myanmar continued to report high rates, at 59.8, 58.6 and 44.4 deaths per 1,000 live births, while the Philippines reported 26 deaths per 1,000 live births in 2022, remains slightly above the target. These results suggest that more effort is needed to close the gap between countries and ensure that progress in reducing child deaths is shared across all AMS.

Figure 1.1.7. Under-five mortality rates (per 1,000 live births) by ASEAN Member States, 2024

Brunei Darussalam	14.0
Cambodia	16.0
Indonesia	19.8
Lao PDR	59.8
Malaysia	8.3
Myanmar	44.4
Philippines	26.0
Singapore	2.8
Thailand	7.4
Timor-Leste	58.6
Viet Nam	17.4

per 1,000 live births
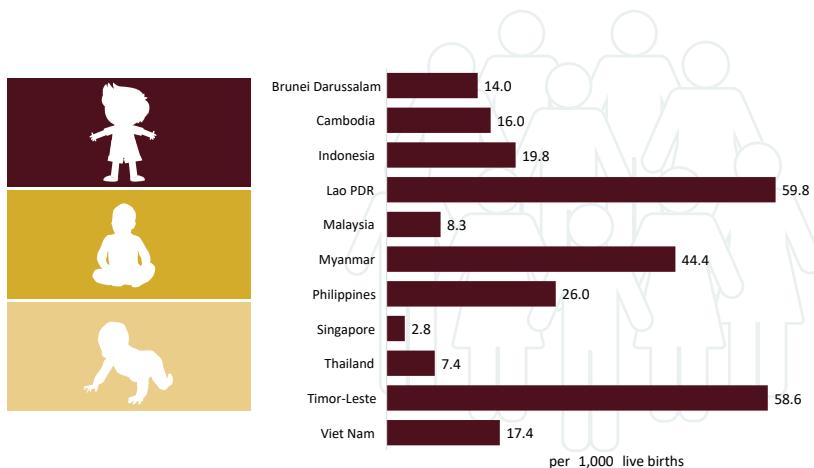
Note   :   The latest available data for Indonesia is 2020, Philippines and Timor-Leste is 2022, Cambodia, Lao PDR, Malaysia, Thailand, and Viet Nam is 2023
Source :   ASEAN Secretariat, ASEANstats database

Lower mortality rates are closely associated with improvements in life expectancy over time, highlighting advances in healthcare access, nutrition, and living standards. Life expectancy at birth represents the average number of years a newborn is expected to live, given the prevailing age-specific mortality rates.

Over the past four decades, ASEAN had achieved remarkable gains in life expectancy as depicted in Figure 1.1.8. Life expectancy at birth in ASEAN continued its upward trend, reaching an average of 73.3 years in 2024, over 12 years increase compared to 1980. This steady rise highlights improvements in healthcare systems, disease prevention, and overall living standards across the region. Women continue to live longer than men, with an average life expectancy of 76.5 years compared to 71.0 years for men in 2024, although the gender gap has gradually narrowed over time.

Figure 1.1.8. Life expectancy at birth (years), ASEAN total, 1980-2024
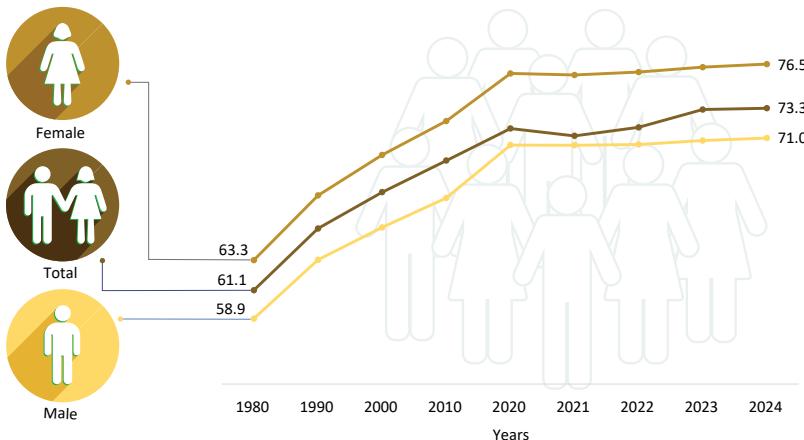
Note : *The ASEAN aggregate cover Timor-Leste for the period of 2020-2024.*
Source : *ASEAN Secretariat, ASEANstats database*

Figure 1.1.9 illustrates the difference in life expectancy between men and women, showing that women continue to live longer in all AMS, with the difference varies considerably, between four to nine years. Singapore continued to report the highest life expectancy, with women living up to 85.6 years and men 81.2 years. In contrast, Lao PDR and Myanmar recorded the lowest, with women reaching 70.1 years and 72.1 years and men 66.1 years and 62.7 years, respectively.

In the Philippines and Thailand, women live about six to eight years longer than men, with life expectancies of 77.5 and 78.3 years compared to 71.3 and 70.5 years for men, respectively. Meanwhile, the disparity was smaller in Brunei Darussalam, Cambodia, Indonesia, Malaysia, Timor-Leste and Viet Nam, where women's life expectancy ranges from 74.9 to 81.0 years compared with 70.5 to 77.3 years for men, suggesting relatively narrower gender gaps and more balanced health conditions between sexes.

Figure 1.1.9. Life expectancy at birth (years) by ASEAN Member States, by sex, 2024
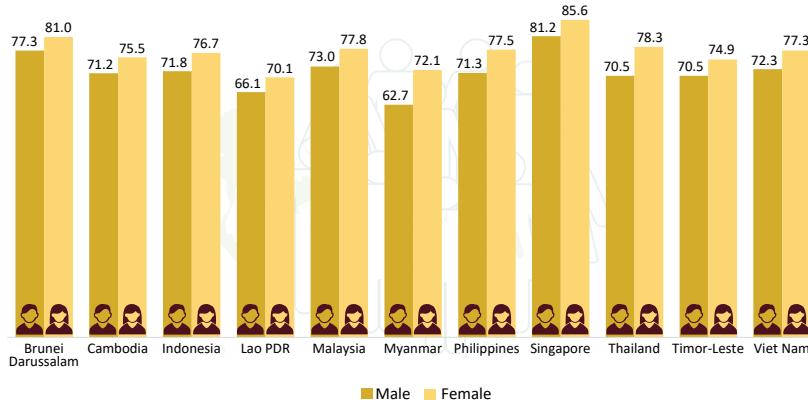
Note : The latest available data for Cambodia, Myanmar and Thailand is 2022
Source : ASEAN Secretariat, ASEANstats database

1.2. EDUCATION

Goal 4 of the 2030 Agenda highlights the global commitment to inclusive and equitable quality education and lifelong learning for all. Education is a critical enabler of sustainable development, fostering human capital and social resilience. Monitoring this goal involves tracking indicators such as net enrolment in primary education,

gender parity indices and pupil−teacher ratios, which provide evidence of educational progress and equity within ASEAN.

Net Enrolment Rate in Primary Education

The Net Enrollment Rate (NER) in primary education measures the proportion of children of official primary school age who participate in primary education. Figure 1.2.1 shows that primary education enrolment remained high across most AMS, reflecting continued progress toward universal access. In 2024, Singapore and Brunei Darussalam maintained close to full participation in primary education with participation rates of 99.8% and 99.4%, respectively. Indonesia, Lao PDR, Malaysia, Thailand and Viet Nam also exhibited strong performance, with enrolment levels between 97% and 99%. These countries have sustained steady progress over the past decade, underscoring the effectiveness of education policies and efforts to expand access.

Figure 1.2.1. Net enrolment rate in primary education (%) by ASEAN Member States, 2015 and 2024
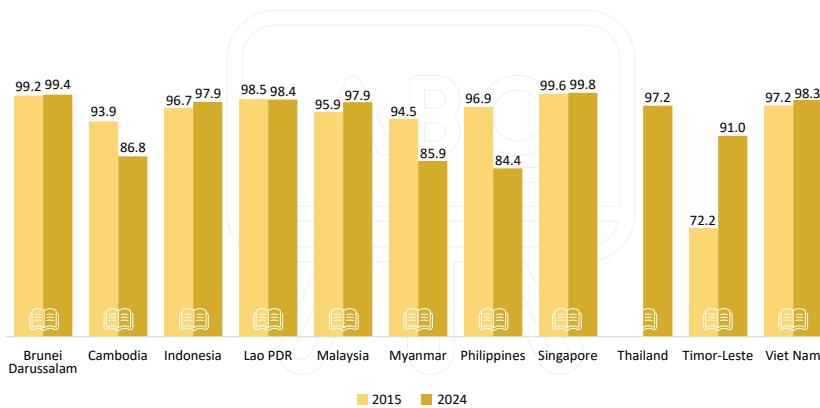
Notes : 1. The latest available data for Brunei Darussalam and Singapore is 2023, Cambodia is 2022
2. Data for Brunei Darussalam and Singapore refer to the total net enrolment rate (TNER) in primary education
Source : ASEAN Secretariat, ASEANstats database

However, several AMS continued to face challenges in achieving full enrolment. Timor-Leste, Cambodia and the Philippines recorded lower participation rates, at 91.0%, 86.8% and 84.4%, respectively, while Myanmar experienced a significant decline to 85.9%. These figures indicate that although access to primary education has generally improved across the region, gaps remain due to factors such as socioeconomic disparities, geographical challenges, and school retention issues. Continued attention is therefore needed to ensure that every child in the region can complete basic education.

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

Achieving gender equality in education is one of key targets under the SDGs, aiming to provide equal access to all levels of education and vocational training for vulnerable groups, including persons with disabilities, indigenous peoples, and children in disadvantaged situations by 2030. One of the main indicators used to monitor progress toward this target is the gender parity index (GPI) in education enrolment, which compares the number of female students to male students at a given level of education.

The GPI for gross enrolment in primary education highlights disparities in access to foundational learning opportunities. A GPI below 1 indicates that girls are underrepresented, while a value above 1 show that girls are enrolled at higher rates than boys. Figure 1.2.2. shows encouraging progress toward gender parity in primary education across the region in 2024. Indonesia, Myanmar, Singapore, and Viet Nam had reached a GPI of 1.00, reflecting balanced enrolment between boys and girls. Malaysia and Timor-Leste reported a GPI of 1.02 and Brunei Darussalam 1.01, reflecting a slight advantage for female students over male students in primary education. Meanwhile, Indonesia (0.99), Lao PDR (0.98), and Cambodia (0.98) are close to gender parity, although the GPI values indicate a slight enrolment advantage for boys at the primary level.

Figure 1.2.2. Gender Parity Index (GPI) Gross Enrolment Rate in Primary
Education, ASEAN Member States, 2024

Country	GPI
Brunei Darussalam	1.01
Cambodia	0.98
Indonesia	0.99
Lao PDR	0.98
Malaysia	1.02
Myanmar	1.00
Philippines	0.90
Singapore	1.00
Timor-Leste	1.02
Viet Nam	1.00
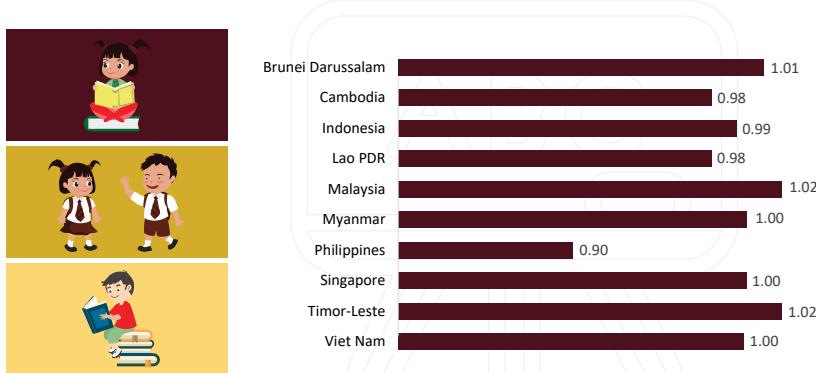
Notes : 1. The latest available for Brunei Darussalam is 2018, Cambodia, Lao PDR, Malaysia and Singapore is 2023, Timor-Leste is 2022
2. No available data for Thailand at the time of publication
Source : ASEAN Secretariat, ASEANstats database

Pupil-Teacher Ratio in Primary Education

The pupil–teacher ratio, which indicates the average number of students assigned to each teacher, provides insight into both the distribution of educational resources and teacher workload. Lower ratios allow teachers to focus more closely on each student, adapting instruction to individual learning needs, which can enhance understanding and improve overall academic performance.

Figure 1.2.3 illustrates the latest available data on pupil–teacher ratios in ASEAN, highlighting considerable variation among AMS. In 2024, Brunei Darussalam and Malaysia maintained the lowest pupil–teacher ratios in the region, at 9.8 and 11.8, respectively, indicating more manageable class sizes for teachers. Indonesia, Singapore, and Thailand exhibited steady improvements and reported relatively low

ratios of 14.6, 14.4, and 15.2, respectively, in the same period. Lao PDR, Myanmar and the Philippines have seen gradual reductions in their ratios over time, but Viet Nam experienced a slight increase from 19.6 in 2015 to 24.2 in 2024. In addition, Timor-Leste recorded a decline in its pupil–teacher ratio from 29.0 in 2015 to 26.0 in 2024. Meanwhile, Cambodia continued to have the highest pupil–teacher ratio in the region at 45.1, indicating remaining challenges in ensuring adequate teacher coverage and smaller class sizes.

Figure 1.2.3. Pupil-teacher ratio in primary education by ASEAN Member States, 2015 and 2024
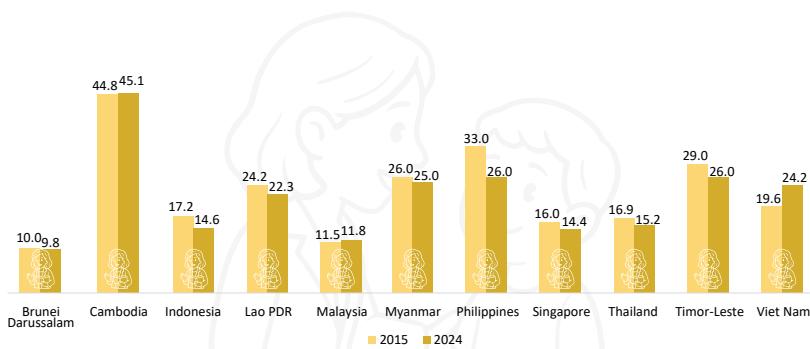
Note   :   The latest available data for Cambodia and Viet Nam is 2022, Singapore is 2023
Source :   ASEAN Secretariat, ASEANstats database

1.3.   HEALTH

Ensuring good health and well-being is a cornerstone of the 2030 Agenda for Sustainable Development, as reflected in Goal 3, which aims to promote healthy lives for all at all ages. Progress toward this goal depends on the availability of essential health services, preventive measures, and a well-trained health workforce. This section examines

key indicators that shed light on health system performance, including the proportion of births attended by skilled personnel, immunization coverage for children, and the density of health workers, highlighting how these elements contribute to achieving universal health coverage and broader development objectives.

Births attended by skilled health personnel

The presence of skilled health personnel during childbirth is essential for safeguarding the health of both mothers and newborns. As part of Goal 3 of the 2030 Agenda, tracking the proportion of births attended by trained professionals, such as doctors, nurses, midwives, or other trained healthcare professionals, provides insight into the effectiveness of maternal care services. High coverage indicates that essential interventions can be delivered promptly, reducing the risk of maternal and neonatal complications and contributing to broader efforts to lower preventable deaths and improve population health.

Figure 1.3.1. shows that the availability of skilled health personnel during childbirth varies widely across ASEAN, reflecting differences in healthcare infrastructure and service delivery. In 2024, most AMS, including Brunei Darussalam, Cambodia, Indonesia, Malaysia, Singapore, Thailand, and Viet Nam, achieved very high coverage, above 96%, suggesting that the majority of mothers have access to trained professionals during delivery. However, notable gaps remain in some countries, particularly Myanmar, Lao PDR, and Timor-Leste, where coverage is substantially lower at 61.3%, 79.8% and 80.0%, respectively, pointing to persistent barriers in maternal healthcare access. The Philippines reported coverage of 89.6%, highlighting the need for focused efforts to ensure all mothers receive skilled care during childbirth.

Figure 1.3.1. Births attended by skilled health personnel (%) by ASEAN
Member States, 2024

	Percentage
Brunei Darussalam	99.6
Cambodia	98.7
Indonesia	96.8
Lao PDR	79.8
Malaysia	99.4
Myanmar	61.3
Philippines	89.6
Singapore	99.5
Thailand	99.6
Timor-Leste	80.0
Viet Nam	96.7
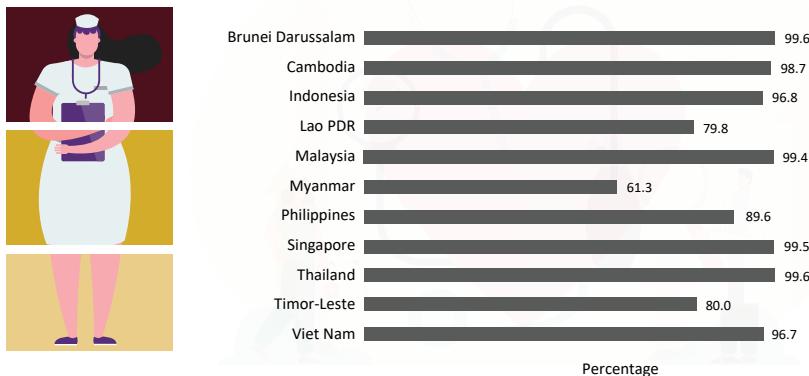
*Note : The latest available data for Cambodia, Philippines and Thailand is 2022, Lao PDR,
Myanmar, and Timor-Leste is 2023*
Source : ASEAN Secretariat, ASEANstats database

Immunisation Against Measles and Diphtheria-Tetanus-Pertussis (DTP)

Vaccination is one of key components of Goal 3 of the 2030 Agenda, which aims to ensure healthy lives and promote well-being for all. Coverage of vaccines included in national immunization programs provides an important measure of access to essential preventive healthcare. Immunization is one of the most cost-effective interventions to reduce child mortality and protect against infectious diseases such as diphtheria, tetanus, pertussis, and measles. Ensuring high vaccination coverage is therefore critical for controlling disease outbreaks and safeguarding public health.

Two commonly monitored vaccines are the diphtheria, tetanus, and pertussis-containing vaccine third dose (DTP3) and the measles-containing vaccine second dose (MCV2). DTP3 coverage refers to the

percentage of surviving infants who have received all three doses according to the nationally recommended schedule, typically starting at 6 weeks of age with subsequent doses 4−8 weeks apart. MCV2 coverage reflects the percentage of children who have received two doses of measles vaccine, with timing guided by national schedules and WHO recommendations. Monitoring these indicators helps track progress toward universal vaccination and highlights areas where efforts are needed to strengthen immunization services.

Figure 1.3.2 highlights the variation in childhood vaccination coverage across AMS, reflecting differences in healthcare delivery and access to vaccines. In 2024, Brunei Darussalam, Lao PDR, Malaysia, Singapore

Figure 1.3.2. Proportion of the target population who received 3 doses of diphtheria-tetanus-pertussis (DTP3) and measles-containing-vaccine second-dose (MCV2) (%), 2024
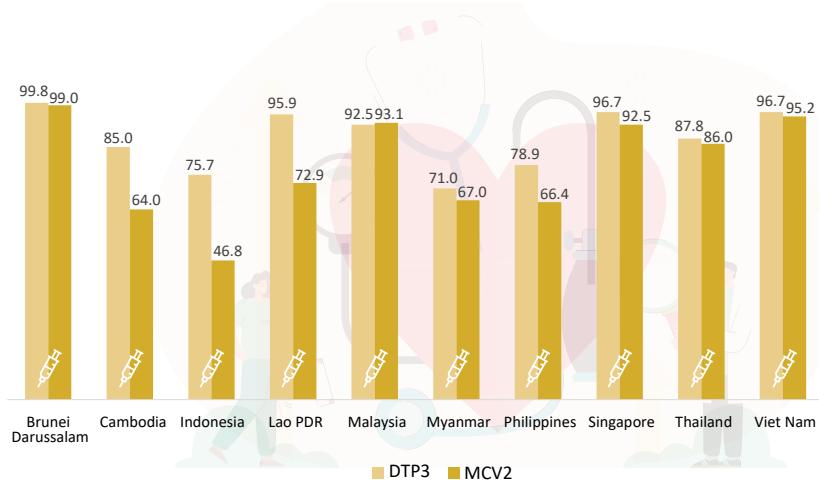
Notes :   1. The latest available data for Cambodia, Indonesia (MCV2) and Lao PDR is 2023, Philippines is 2022
2. No available data for Timor−Leste at the time of publication
Source :   ASEAN Secretariat, ASEANstats database and SDG Global Database for Cambodia and Lao PDR

and Viet Nam achieved high DTP3 coverage, ranging from 92.5% to nearly 100%, while MCV2 coverage was similarly strong in Brunei Darussalam, Malaysia, Singapore, Thailand, and Viet Nam, exceeding 85%. Other countries, including Cambodia, Indonesia, Lao PDR, Myanmar and the Philippines, showed lower coverage, particularly for MCV2, with rates ranging from 46.8% to 72.9%. These disparities underscore the need to strengthen routine vaccination programs, particularly for the second dose of measles vaccine, to ensure that children across the region are fully protected against vaccine-preventable diseases.

Health Worker Density

A strong and well-distributed health workforce is fundamental to the effectiveness of healthcare systems and the delivery of essential health services. The availability of trained and competent health professionals directly impacts on the quality of care, the services coverage and the ability to respond to public health needs. Measuring health worker density provides insight into whether countries have sufficient medical personnel to meet the healthcare demands of their populations. Ensuring adequate numbers of skilled health workers, supported by continuous training and equitable deployment, is critical for advancing universal health coverage and improving health outcomes across all communities.

Health workforce availability varies widely across AMS, reflecting differences in the capacity of national healthcare systems. Figure 1.3.3 shows that in 2024, Singapore continued to record the highest density of medical professionals, including 29 doctors, 83 nursing and midwifery staff, 5 dentists, and 7 pharmacists per 10,000 population, demonstrating a well-resourced health system. Brunei Darussalam and Malaysia also reported strong workforce numbers, particularly in nursing and midwifery, supporting broad access to

Figure 1.3.3. Health worker density, by type of occupation (per 10,000 population), 2024
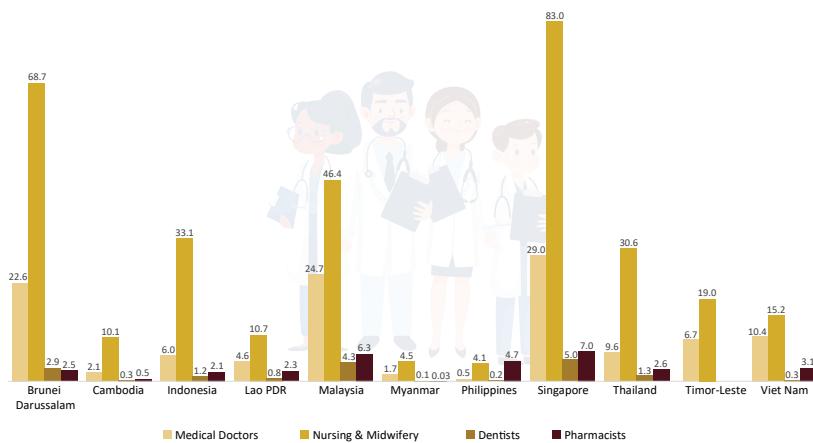
Notes : 1. *The latest available data for:*
   a. *Medical doctors: Cambodia is 2019, Lao PDR, Myanmar and Timor-Leste is 2023*
   b. *Nursing & Midwifery: Cambodia is 2019, Lao PDR, Malaysia, Myanmar and Timor-Leste is 2023*
   c. *Dentists: Cambodia is 2018, Lao PDR is 2020, Myanmar is 2023*
   d. *Pharmacists: Cambodia is 2018, Lao PDR is 2020, Philippines is 2021, Myanmar is 2023*
   2. *The Philippines data for Medical Doctors, Nursing & Midwifery, and Dentists refer to government health worker only*

Source : *ASEAN Secretariat, ASEANstats database and SDG Global Database for Cambodia (all occupation), Lao PDR (Dentists and Pharmacists), and Philippines (Pharmacists)*

essential healthcare services. In contrast, Myanmar faced shortages, with only about 2 doctors and 5 nursing and midwifery personnels per 10,000 population, which constrain service delivery. Other AMS, including Cambodia, Indonesia, Lao PDR, Thailand, Timor-Leste and Viet Nam reported moderate workforce levels, with doctors ranging from 4.6 to 10.4 per 10,000 population and nursing staff between 10.1 to 33.1 per 10,000 population. These disparities highlight the ongoing challenge of ensuring sufficient, skilled, and evenly distributed health personnel to meet population needs and strengthen healthcare systems across the region.

1.4. LABOUR

Labour is the backbone of economic and social development and understanding workforce dynamics is essential for shaping inclusive growth in the region. Labour statistics offer valuable insights into workforce participation, employment patterns, and the challenges faced by workers, supporting policymakers in designing effective interventions. This section examines recent developments in the ASEAN labour market, highlighting indicators such as labour force participation, unemployment, and sectoral employment, to illustrate how work is changing across the region.

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 shows the diversity of labour force participation across AMS, reflecting differences in workforce and economic conditions. Cambodia maintained the highest participation rates, increasing from 82.7% in 2015 to 83.7% in 2022. In contrast, Viet Nam experienced a decrease from 77.8% in 2015 to 68.2% in 2024, while Thailand's LFPR also fell slightly to 68.2% over the same period. Brunei Darussalam had a modest decline from 65.6% in 2015 to 64.1% in 2024, while Myanmar's participation rate decreased from 64.7% in 2015 to 61.1% in 2023. Lao PDR saw the steepest decline in the region, with its LFPR falling from 68.0% in 2015 to 47.1% in 2022.

At the same time, several economies showed gradual improvement. Indonesia recorded a significant increase in LFPR, rising from 65.8%

Figure 1.4.1. Labour force participation rate (%) by ASEAN Member States, 2015 and 2024
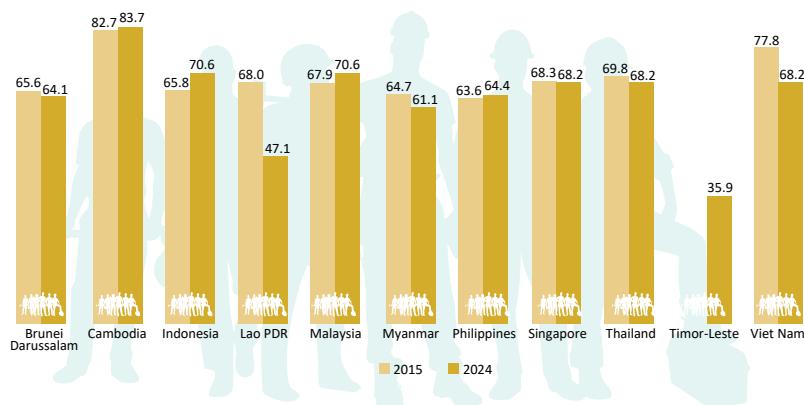
Note   : The latest available data for Cambodia, Lao PDR and Timor-Leste is 2022, Myanmar is 2023
Source : ASEAN Secretariat, ASEANstats database

in 2015 to 70.6% in 2024, followed by Malaysia, which grew from 67.9% to 70.6% over the same period. Singapore's rate remained relatively stable at around 68%, while the Philippines slightly increased from 63.6% in 2015 to 64.4% in 2024. Meanwhile, based on the available data reported, Timor-Leste recorded the lowest LFPR in the region, at 35.9% in 2022.

The gender gap in labour force participation continued to vary widely across AMS, with male participation consistently outpacing female participation across all AMS, as illustrated in Figure 1.4.2. The disparity was particularly pronounced in Myanmar, where male engagement stood at 77.7% compared with just 47.3% for females. Indonesia and Malaysia also faced substantial gaps, with differences of 28.2 and 26.5 percentage points, respectively. Meanwhile, Cambodia reported

narrower gaps of under 10 percentage points, reflecting stronger female participation relative to men.

In term of absolute levels of participation, Cambodia continued to report the highest engagement for both sexes, with males at 88.7% and females at 78.9%. Indonesia and Malaysia also reported high male participation, at 84.7% and 83.0% respectively, while female participation was relatively strong in Singapore (62.8%) and Viet Nam (62.5%). Lao PDR and Timor-Leste reported the lowest participation rates for both sexes, with male participation at 52.6% and 41.9% and female participation at 41.9% and 29.7%, respectively, reflecting ongoing challenges in workforce engagement, particularly among women.

Figure 1.4.2. Labour force participation rate (%) by sex in ASEAN Member States, 2024

Unemployment Rate

The unemployment rate is a key indicator of labour market performance, showing the share of the working-age population that is without a job but actively seeking employment. Monitoring unemployment trends is essential for policymakers to identify gaps in the labour market, evaluate economic conditions, and design strategies that promote job creation, support workforce inclusion, and strengthen overall economic stability.

Figure 1.4.3 presents the unemployment trends in ASEAN over the past decade, illustrating the different patterns of unemployment in each country. Some AMS experienced notable improvements, with unemployment declining from 6.9% to 4.8% in Brunei Darussalam, 6.2% to 4.9% in Indonesia, 3.6% to 2.4% in Lao PDR and 6.3% to 3.8% in the Philippines between 2015 and 2024, reflecting

Figure 1.4.3. Unemployment rates (%) by ASEAN Member States, 2015 and 2024
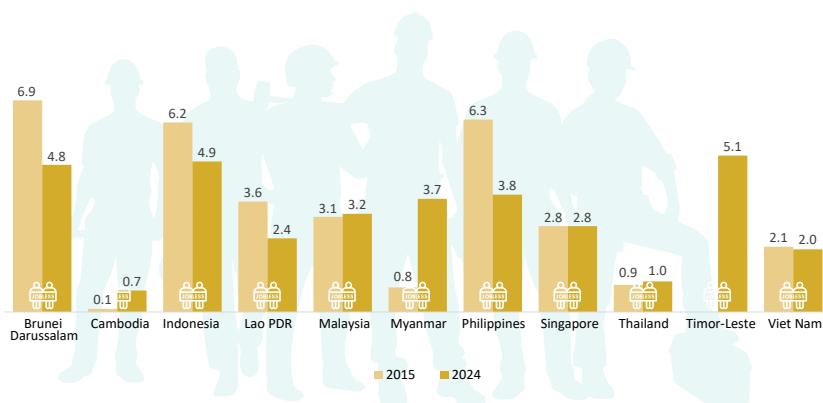
Note   :   The latest available data for Cambodia and Myanmar is 2023, Lao PDR is 2022, Timor-Leste is 2021
Source :   ASEAN Secretariat, ASEANstats database

strengthened labour market conditions. Meanwhile, despite rising slightly from 0.1% in 2015 to 0.7% in 2023, Cambodia maintained low unemployment over the decade, showing resilience and stable employment conditions.

Other AMS showed relatively stable or low unemployment rate over the past decade. Singapore remained steady at 2.8%, while Thailand and Viet Nam remained among the lowest in the region, at 1.0% and 2.0%, respectively. In contrast, Myanmar experienced an increase in unemployment, rising to 3.7% in 2023 from just 0.8% in 2015. Meanwhile, the latest available data indicate an unemployment rate of 5.1% in 2021 in Timor-Leste.

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 1.4.4 illustrates the composition of employment across economic activity in ASEAN in 2024, highlighting the dominance of the services sector in most AMS. Singapore had the highest share of employment in services at 86.7%, followed by Brunei Darussalam (76.7%) and Malaysia (64.6%). The Philippines also reported a

strong share of service-based employment at 61.1%, while Indonesia, Thailand and Timor-Leste recorded 49.6%, 48.8% and 57.3%, respectively. Cambodia reported a balanced distribution, with roughly one-third of its workforce employed in agriculture (33.1%), industry (33.4%), and services (33.5%), reflecting a more diversified employment structure.

In contrast, agriculture remained the primary source of employment in Lao PDR and Myanmar, accounting for 57.5% and 48.9% of the workforce, respectively. Industry accounted for a relatively high share of employment in Viet Nam (33.3%) and Cambodia (33.4%), underscoring the importance of manufacturing in these economies. Thailand and Indonesia reported moderate shares in industry at 22.2%. These patterns highlight the varied economic structures across ASEAN, with countries at different stages of transition from agriculture and industry toward service-oriented employment.

Figure 1.4.4. Shares of employment by economic activity (%), ASEAN Member States, 2024
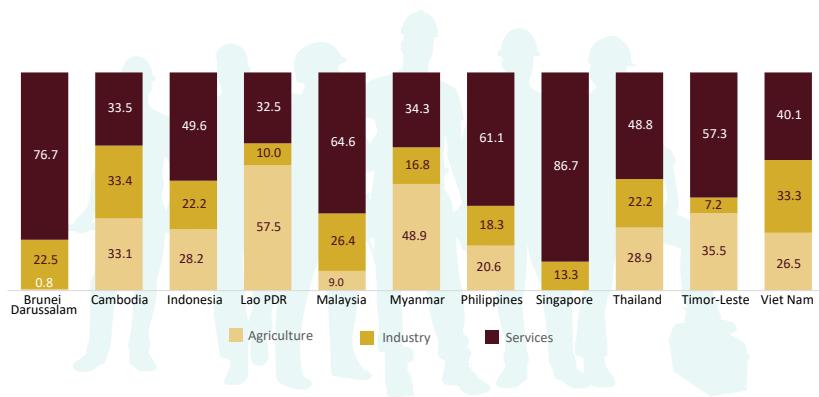
Note   : The latest available data for Cambodia and Myanmar is 2019, Lao PDR is 2022
Source: ASEAN Secretariat, ASEANstats database

1.5. POVERTY AND INEQUALITY

Reducing poverty and narrowing inequality remain key priorities for ASEAN, in line with the commitments outlined under the Sustainable Development Goals. As economies grow and living standards improve, it is essential to ensure that this progress is shared broadly across all segments of society. Regular monitoring of poverty levels and income distribution helps indicate whether development is reaching those most in need. This section presents national poverty rates as measured by proportion of population living below the national poverty line and levels of inequality measured through the Gini Ratio across the AMS.

Poverty

The national poverty rate is defined as the percentage of total population living below the national poverty line. The national poverty line itself is the minimum level of income considered adequate to live in a particular country. The national poverty line is commonly used to

Figure 1.5.1. Population living below the national poverty lines (%) by ASEAN Member States, 2016 and 2024
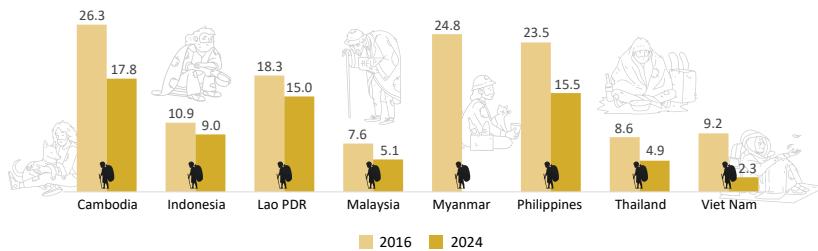
Notes : 1. The indicator is not applicable to Brunei Darussalam and Singapore
2. The latest available data for Myanmar is 2017, Cambodia is 2020, Philippines is 2023
3. The data for Malaysia refer to proportion of households living below the national poverty line while for Viet Nam, the data refer to proportion of households living below the national multidimensional poverty rate
Source: ASEAN Secretariat, ASEANstats database

estimate poverty rates by taking into account the economic and social conditions of each country.

Figure 1.5.1 presents the latest available data on national poverty rates in ASEAN, indicating a broadly positive trend, though the pace of progress differs considerably among AMS. Viet Nam recorded the lowest poverty rate in the region at 2.3% in 2024, reflecting significant progress over the past eight years. Improvements were also evident in Thailand where poverty rates declined from 8.6% in 2016 to 4.9% in 2024, and Malaysia from 7.6% to 5.1%, respectively, between 2016 and 2024. Indonesia experienced a more gradual decline from 10.9% in 2016 to 9.0% in 2024. In addition, Lao PDR and the Philippines also reported a notable decrease, from 18.3% to 15.0% in 2024 and from 23.5% to 15.5% in 2023, respectively. Based on the latest available data reported, Cambodia also recorded a poverty rate of 17.8% in 2020, marking a decline from it in 2016, while Myanmar reported a relatively high poverty rate of 24.8% in 2017.

Income inequality

Income inequality refers to the uneven distribution of income between individuals or households in a given country and is commonly measured by the Gini Coefficient (Ratio). A Gini Ratio of 0 represents perfect equality, while a ratio of 1 implies perfect inequality.

Figure 1.5.2 illustrates recent trends in income inequality across AMS, showing a mix of progress and emerging challenges. Viet Nam posted one of the most significant declines, with the Gini Ratio dropped from 0.43 in 2015 to 0.37 in 2024. Several AMS, including Cambodia, Indonesia, Malaysia, the Philippines, Singapore, and Thailand, also recorded modest declines in inequality. Meanwhile, though Myanmar indicated a decline from 0.35 in 2015 to 0.30 in 2017, the absence of

Figure 1.5.2. Gini Ratio by ASEAN Member States, 2015 and 2024
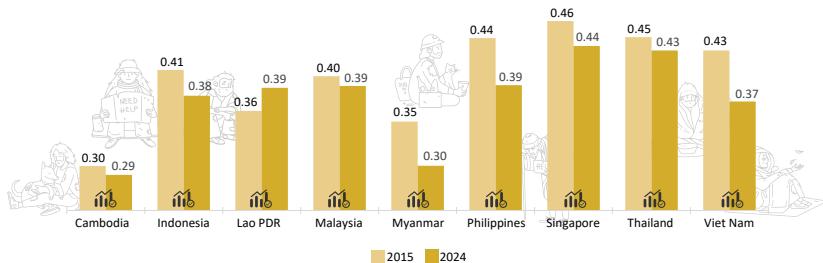
more recent figures limits further assessment. In contrast, Lao PDR recorded an increase in its Gini Ratio from 0.36 in 2015 to 0.39 in 2018, signaling widening disparities and underscoring the need for targeted policy interventions.

Economy
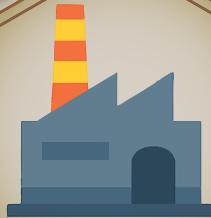
2. ECONOMY

2.1. ECONOMY SIZE AND GROWTH

The combined GDP of the eleven AMS, including Timor-Leste, increased from US$3.8 trillion in 2023 to US$3.9 trillion in 2024. This growth has enabled ASEAN to maintain its position as the fifth-largest economy globally, contributing approximately 3.5% to total global output. Together with the United States (US$29.3 trillion), China (US$18.7 trillion), Germany (US$4.7 trillion), and Japan (US$4.0 trillion), ASEAN collectively accounts for more than half of global economic activity.

Figure 2.1.1. GDP (US$ trillion) and growth rate (%) of the top ten largest economies, 2023-2024
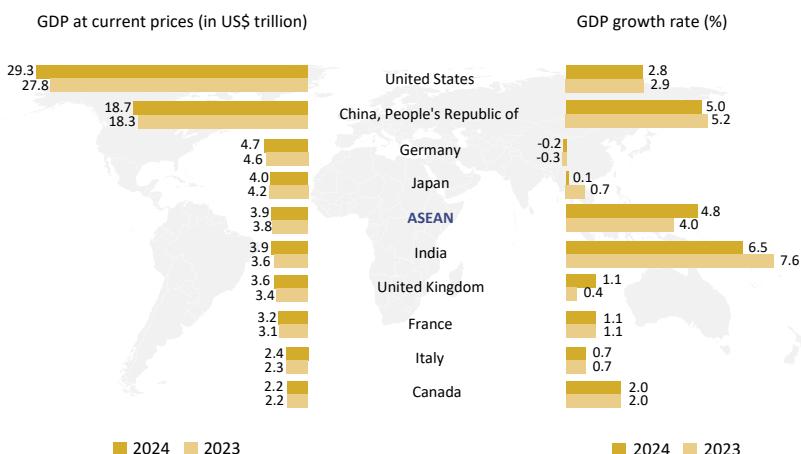
Source: ASEAN Secretariat, ASEANstats database

In 2024, global GDP growth eased slightly to 3.3% slower than 3.5% in 2023, amid ongoing uncertainties in the global economic landscape[2].

[2] IMF, World Economic Outlook, October 2025

Several major economies recorded a slower growth rate compared to the previous year. Despite this, ASEAN's economy expanded at a faster pace than the global average, growing by ASEAN's GDP grew 4.0% in 2023 and 4.8% in 2024, thus demonstrating the region's sustained resilience.

The region also maintained a steady upward trajectory in both nominal ASEAN GDP and GDP per capita over the past two decades, as reflected in Figure 2.1.2. During the same period, ASEAN GDP per capita increased from US$5,547 to US$5,759, underscoring continued socio-economic progress and improvements in productivity across the region.

Figure 2.1.2. ASEAN GDP (US$ trillion) and GDP per capita (US$), 2000-2024
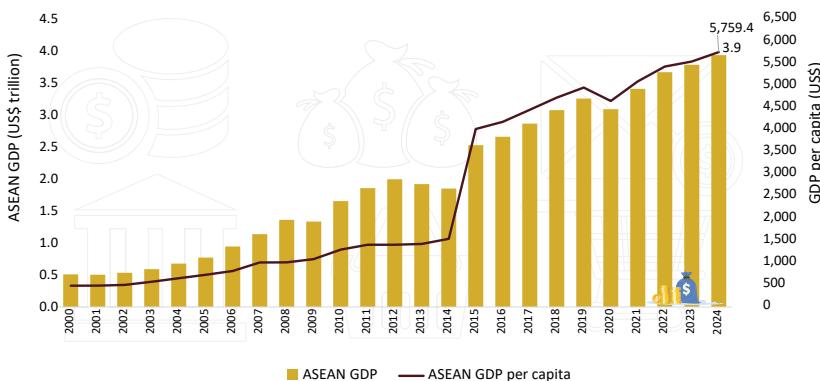
Source: ASEAN Secretariat, ASEANstats database

At the country level, growth rates varied across AMS (Figure 2.1.3). In 2024, Viet Nam (7.1%), the Philippines (5.7%), Cambodia (5.6%), Malaysia (5.1%), Indonesia (5.0%), and Singapore (4.4%) recorded relatively strong and stable growth rates. At the same time, Thailand

(2.5%) and Myanmar (2.9%) experienced more moderate expansions. In contrast, Timor-Leste recorded a contraction of 9.1%, reflecting ongoing domestic challenges.

Figure 2.1.3. ASEAN GDP at current prices (US$ billion) and GDP growth rate (%), 2023-2024

GDP at current prices (US$ billion)

GDP growth rate (%)

Country	2023	2024
Indonesia	1,371.1	1,357.3
Singapore	501.3	547.5
Thailand	514.9	526.5
Viet Nam	429.5	476.3
Philippines	437.2	461.6
Malaysia	396.3	420.1
Myanmar	64.4	72.1
Cambodia	42.3	46.0
Brunei Darussalam	15.1	15.3
Lao PDR	14.2	15.1
Timor-Leste	2.1	1.9

Growth rate (%): Indonesia 5.0 / 5.0; Singapore 1.1 / 4.4; Thailand 1.9 / 2.5; Viet Nam 5.0 / 7.1; Philippines 5.5 / 5.7; Malaysia 3.6 / 5.1; Myanmar 3.5 / 2.9; Cambodia 5.0 / 5.6; Brunei Darussalam 1.4 / 4.1; Lao PDR 4.2 / 4.3; Timor-Leste (18.1) / (9.1)

■ 2023 ■ 2024

Source: ASEAN Secretariat, ASEANstats database

The composition of ASEAN's GDP reflects the varying economic sizes of its Member States (Figure 2.1.4). In 2024, Indonesia remained the largest economy in ASEAN with a GDP of US$1.4 trillion or 34.5% of the region's GDP, followed by Singapore (13.9%), Thailand (13.4%), Viet Nam (12.1%), the Philippines (11.7%), and Malaysia (10.7%). Collectively, these six countries accounted for 96.2% of ASEAN GDP. It was also observed that between 2015 and 2024, Indonesia, Singapore, Viet Nam, and Cambodia recorded notable increases in their shares of ASEAN's GDP.

Figure 2.1.5 illustrates the economic structure at the national and regional levels, using the GDP by production approach. The structure breakdown is based on the three major sectors: primary,

Figure 2.1.4. ASEAN Member States' GDP contributions to total ASEAN GDP (%), 2015 and 2024
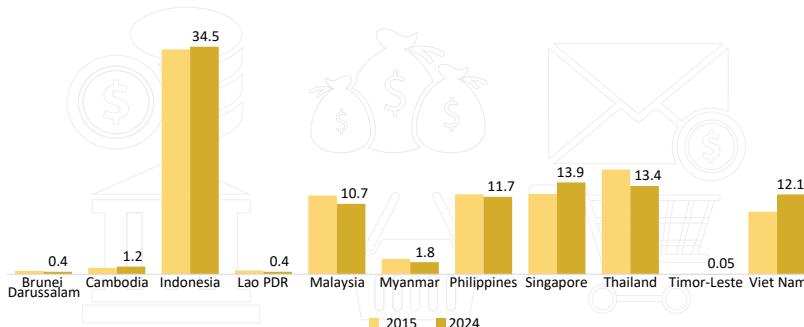
Source: ASEAN Secretariat, ASEANstats database

secondary, and tertiary. The data show that ASEAN's economic structure continued to shift toward services in 2024. The tertiary sector accounted for 54.7 percent of regional GDP, increasing from 52.6 percent in 2015. The secondary sector remained stable at 30.2 percent, while the primary sector declined to 15.1 percent, in line with the region's long-term structural transformation.

Variation in the economic structure is also evident among AMS (Figure 2.1.6). In 2024, Singapore had the largest share of the tertiary sector, with services contributing 77.3% to its total GDP, followed by the Philippines (63.2%) and Timor-Leste (60.1%), reflecting their predominantly service-oriented economies. Meanwhile, the largest share of the primary sector was recorded in Brunei Darussalam (40.6%), with Myanmar (29.1%) and Lao PDR (22.7%) also maintaining sizable primary sector contributions. In contrast, Cambodia, Indonesia, Malaysia, Thailand, and Viet Nam have more diversified economic structures, with substantial contributions from both manufacturing and services.

Figure 2.1.5. Shares of main economic sectors to total GDP (%), 2015-2024

Tertiary sector | Secondary sector | Primary sector

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Primary	16.1	15.6	15.5	15.2	14.6	14.8	15.8	16.9	15.9	15.1
Secondary	31.3	31.2	31.3	31.6	31.4	31.3	31.5	30.7	30.3	30.2
Tertiary	52.6	53.2	53.1	53.2	54.0	53.9	52.7	52.4	53.8	54.7
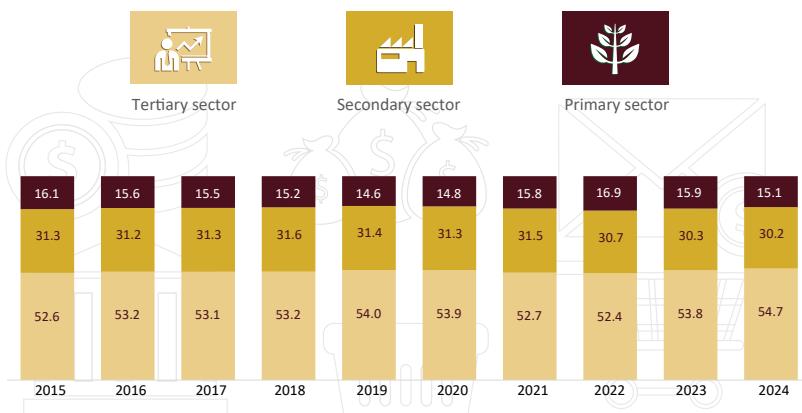
Source: ASEAN Secretariat, ASEANstats database

Figure 2.1.6. Shares of main economic sectors to total GDP (%) by ASEAN Member States, 2024

Tertiary sector | Secondary sector | Primary sector

	Brunei Darussalam	Cambodia	Indonesia	Lao PDR	Malaysia	Myanmar	Philippines	Singapore	Thailand	Timor-Leste	Viet Nam
Primary	40.6	21.0	22.7	27.7	16.3	29.1	10.0		10.8	18.3	15.6
Secondary	21.1	40.8	31.5	32.1	29.4	30.6	26.8	22.6	30.1	12.6	38.3
Tertiary	38.3	38.2	45.7	40.2	54.4	40.3	63.2	77.3	59.2	69.1	46.1
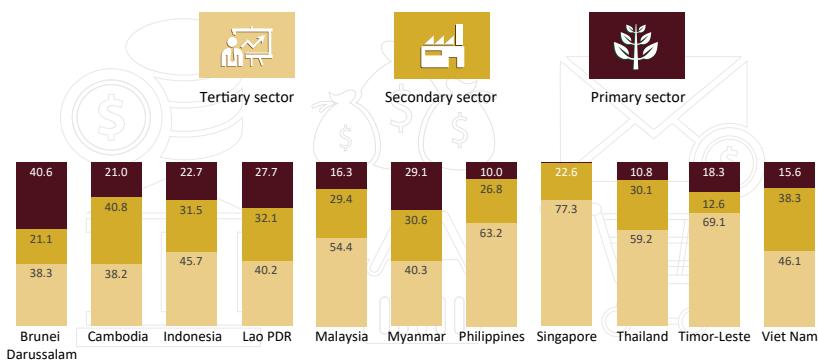
Source: ASEAN Secretariat, ASEANstats database

In 2024, Singapore's GDP per capita reached US$90,689, almost double its level in 2010, and remained the highest among AMS. This notable achievement places Singapore as the only Southeast Asian

economy among the world's top ten highest-income countries. Following Singapore, Brunei Darussalam recorded a GDP per capita of US$33,619, Malaysia US$12,333, and Thailand US$7,499 (Figure 2.1.7). These four AMS were above the ASEAN average of US$5,759. The remaining AMS recorded GDP per capita levels ranging from US$1,300 to US$4,800, reflecting the diverse stages of economic development and income disparities within the region.

Figure 2.1.7.   GDP per capita (US$) by ASEAN Member States, 2005-2024
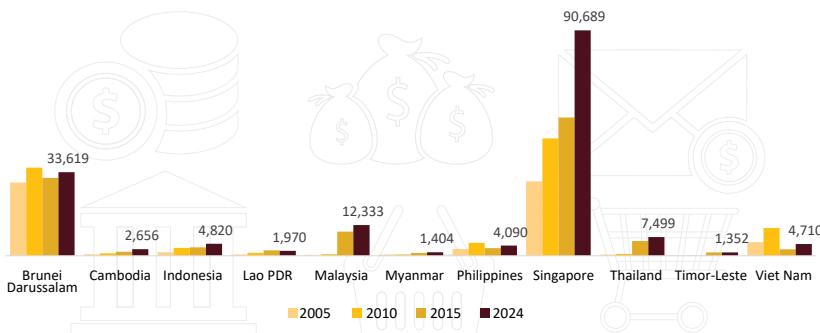
Note   :   Data for Myanmar are reported on a fiscal-year
Source :   ASEAN Secretariat, ASEANstats database

2.2. INTERNATIONAL MERCHANDISE TRADE

ASEAN's merchandise trade continued its upward trajectory in 2024, reflecting the region's resilience amid a gradually improving global economic environment. As presented in Figure 2.2.1, the region's total trade increased by 8.8 percent, rising from US$3.5 trillion in 2023 to US$3.8 trillion in 2024, comprising exports valued at US$1.95 trillion and imports amounting to US$1.89 trillion. Since 2005, ASEAN has consistently maintained a trade surplus. Both exports and imports

have expanded significantly over the past two decades, supported by the strong performance of key product groups that continue to dominate the region's production and trade structure.

Electrical machinery and equipment (HS 85) remained the largest contributor to ASEAN's total trade, accounting for 27.2% and increasing by 9.6% in 2024 from the previous year. Machinery and mechanical appliances (HS 84), which represented 12.3% of total trade, recorded a significant increase of 25.6%. Precious stones and metals (HS 71), though accounted for a smaller share of around 3.0% experienced a notable 27.6% growth. Meanwhile, mineral fuels and oils (HS 27) which contributed 12.5 % of total trade, recorded a decline of 2.2%. The remaining 45% of total merchandise trade comprised a wide range of manufactured goods, agricultural products, and processed materials.

Figure 2.2.1. ASEAN merchandise exports and imports and trade balance (US$ billion), 2005-2024
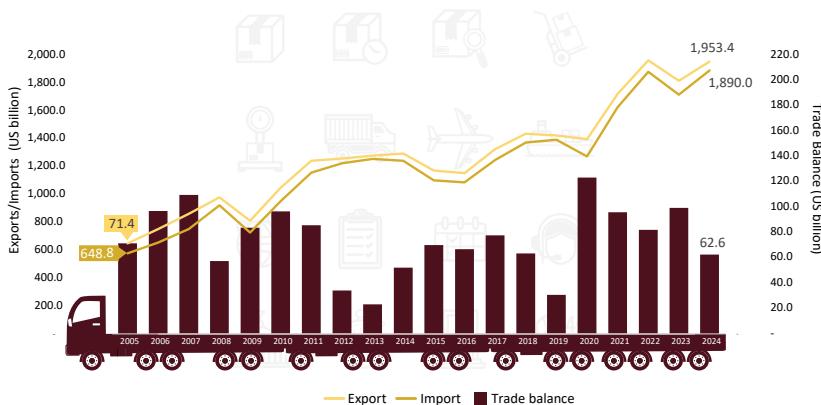
Source: ASEAN Secretariat, ASEANstats database

The performance of merchandise trade across AMS in 2024 is illustrated in Figure 2.2.2. Singapore remained the largest contributor, accounting for 25.0% of ASEAN's total trade and expanding by 7.0%. Malaysia, Viet Nam, Thailand, Indonesia, and the Philippines collectively accounted for 71.4% of the region's total trade, underscoring their continued roles as ASEAN's major trading economies. Among the other Member States, Cambodia recorded the highest growth at 20.1%, while Lao PDR and Brunei Darussalam expanded by 11.1% and 8.2%, respectively. In contrast, Myanmar experienced a contraction of 12.0%. Timor-Leste, despite representing only 0.03% of ASEAN's total trade, registered 5.9% growth during the year.

Figure 2.2.2. Merchandise trade share and growth rate (%) by ASEAN Member State, 2024
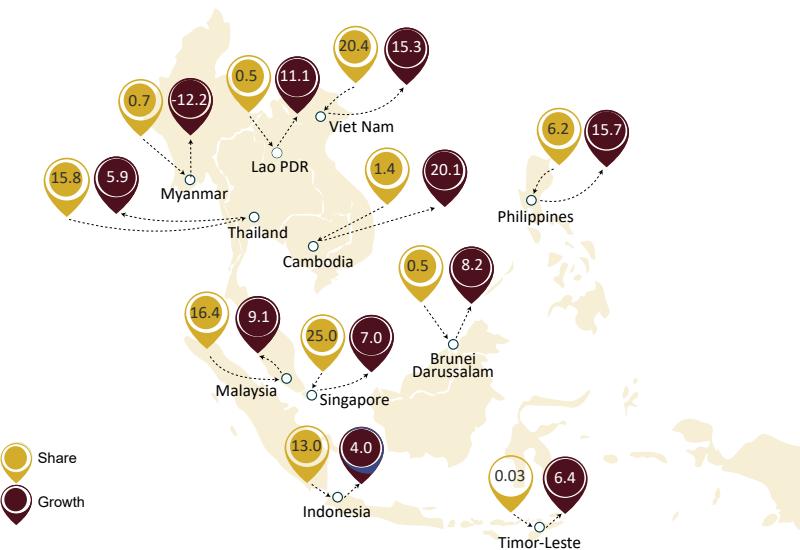
Source: ASEAN Secretariat, ASEANstats database

In 2024, intra-ASEAN trade continued to account for the largest share of ASEAN total trade, representing 21.4%. Intra-ASEAN exports

contributed 22.5% to total ASEAN exports, while intra-ASEAN imports constituted 20.3% of total ASEAN imports (Figures 2.2.3 and 2.2.4). The United States remained ASEAN's top export destination, with its share gradually rising from 14.3% in 2005 to approximately 16% in 2024, followed by China with its share steadily increasing from 8.1% in 2005 to 14.9% in 2024.

Figure 2.2.3. Shares of merchandise exports (%) by Trading Partners, 2005-2024
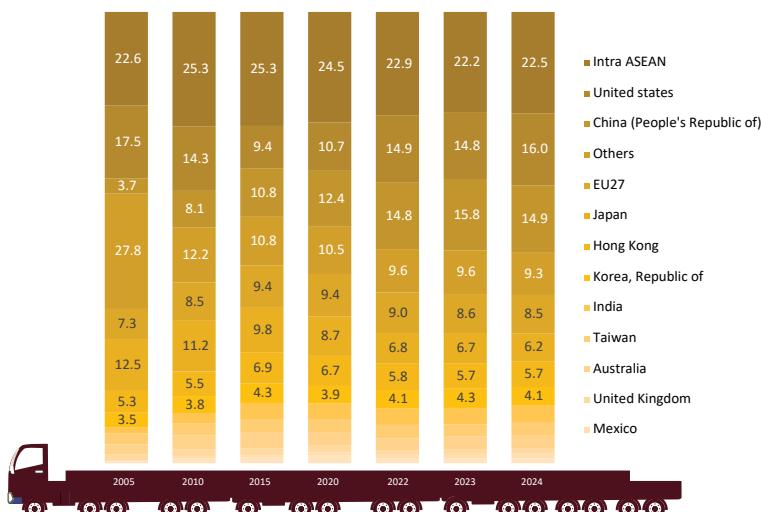
Note   :   Timor-Leste is not available at the time of publication
Source :   ASEAN Secretariat, ASEANstats database

Over the past two decades, the structure of ASEAN's merchandise imports shifted significantly. China has established itself as ASEAN's largest source of imports, with its share increasing from 10.6% in 2005 to 25.5% in 2024. In contrast, the share of intra-ASEAN imports has declined from 24.5% in 2005 to 20.3% in 2024.

Figure 2.2.4. Shares of merchandise imports (%) by Trading Partners, 2005-2024
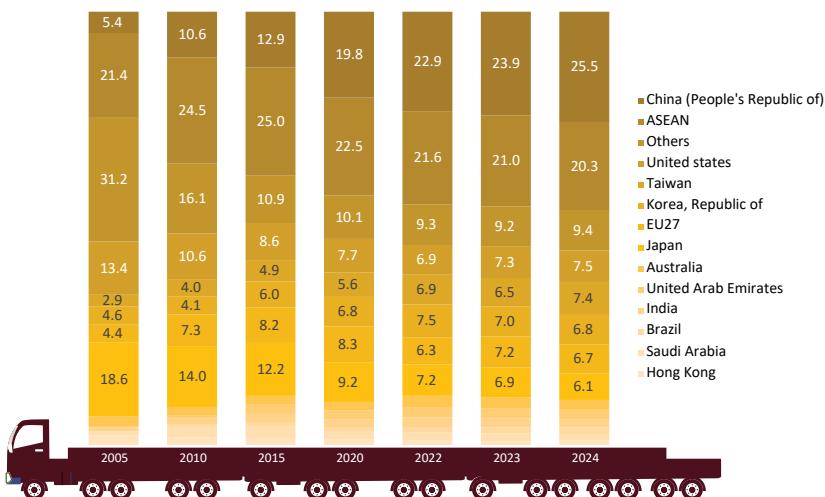
	China (People's Republic of)
	ASEAN
	Others
	United states
	Taiwan
	Korea, Republic of
	EU27
	Japan
	Australia
	United Arab Emirates
	India
	Brazil
	Saudi Arabia
	Hong Kong

Note   :   Timor-Leste is not available at the time of publication
Source :   ASEAN Secretariat, ASEANstats database

In the first half of 2025, ASEAN merchandise trade reached US$2.1 trillion, reflecting a 16.4% growth increase from the 6.4% recorded in the same period of 2024. Exports and imports also saw a positive increase by 17.4% and 15.3%, respectively, resulting in a trade surplus of US$53.3 billion, an 85% increase from the same period last year. Quarterly trends indicated sustained momentum with a 14.5% increase in ASEAN trade in the first quarter of 2025 and accelerating to 18.1% in the second quarter. Most AMS recorded positive growth in total trade during the second quarter, although Brunei Darussalam and the Philippines experienced declines of 34.8% and 5.4%, respectively (Figure 2.2.5).

Figure 2.2.5. Growth of merchandise trade (%) by ASEAN Member States, Q1 2024 – Q2 2025

Legend: 2024 Q1, 2024 Q2, 2024 Q3, 2024 Q4, 2025 Q1, 2025 Q2
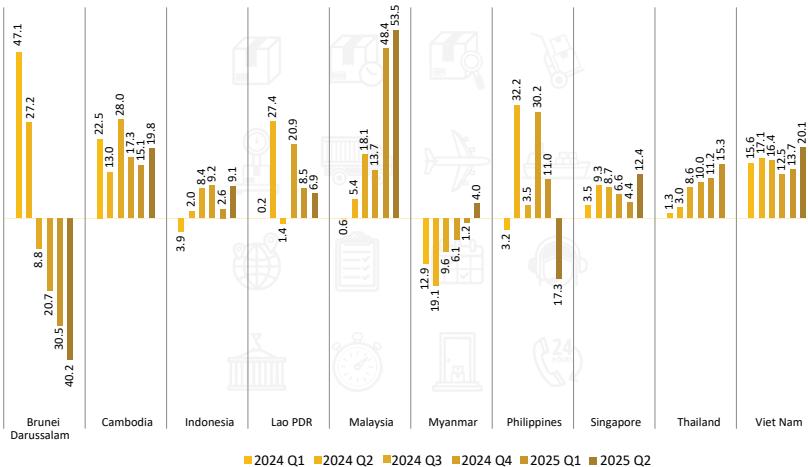
Source : ASEAN Secretariat, ASEANstats database

Trend's in ICT Goods Trade in ASEAN, 2015-2024

In the last decade, information and communications technologies (ICTs) are increasingly recognised as a key sector for economic diversification, extending growth opportunities beyond traditional industries such as agriculture and manufacturing. ICTs form the backbone of modern digital ecosystems, enabling economies and societies to innovate, modernise, and improve efficiency across governance, business operations, and personal communications.

ICT goods constitute the essential hardware that enables computer networks and the internet, supporting both the consumption

and production of ICT and other digitally delivered services. UNCTAD and UNSD classify ICT goods under specific HS codes, and trade in these products offers valuable insights into the pace of digitalisation. These goods are further organised into distinct product categories in the following: ICT01: Computers and ICT peripheral equipment; ICT02: Communication equipment; ICT03: Consumer electronic equipment; ICT04: Electronic components; and ICT05: Miscellaneous ICT goods (not elsewhere classified).

Monitoring the development of ICT trade[3] enables ASEAN to assess how dynamic, diversified, and responsive its economy is to global technological trends, thereby supporting long-term sustainability. The contribution of ICT goods to total ASEAN's trade in goods increased from 18.2% in 2015 to 25.6% in 2024. As shown in Figure 2.2.6, ASEAN's trade in ICT goods increased by 17.2%, from US$838.7 billion in 2023 to US$983.1 billion in 2024. In the same period, exports and imports of ICT goods grew by 13.4% and 22.1%, respectively, continuing the positive trend of a sustained trade surplus recorded over the past decade.

In 2024, with 60.1% of shares, electronic components were the main contributors to ASEAN's ICT trade (Figure 2.2.7), followed by computers and ICT peripheral equipment (17.7%), and communication equipment (14.7%). These three categories represented 92.5% of ASEAN's total ICT trade in goods. All components of the ICT trade in goods recorded positive growth in 2024 compared to the previous year. Computer and ICT peripheral equipment registered the strongest increase at 61.1%. Trade in electronic components also rose by 11%, while communication equipment recorded an 8.7% increase. These developments

---

[3] UNCTAD, Trade in ICT goods statistics

highlight the continued expansion of the region's ICT-related production and trade activities.

Figure 2.2.6. ASEAN ICT trade in goods (US$ billion), 2015-2024

Source : ASEAN Secretariat, ASEANstats database

Figure 2.2.7. ICT trade in Goods of ASEAN, by categories (US$ billion), 2023-2024
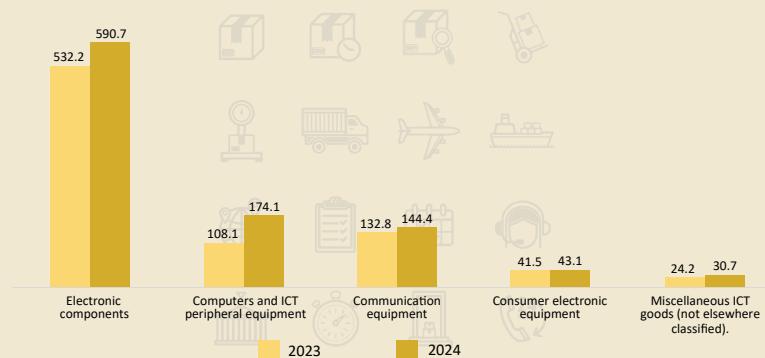
Source : ASEAN Secretariat, ASEANstats database

2.3. INTERNATIONAL TRADE IN SERVICES

Trade in services in ASEAN demonstrated continued resilience in 2024, marking another year of strong expansion. Figure 2.3.1 shows that both exports and imports of services sustained their upward trajectory for the third consecutive year, reflecting the region's steady post-pandemic recovery and growing competitiveness in the global services market. Total services exports rose by 14.0% to US$667.9 billion, while imports increased by 10.2% to US$619.0 billion. This sustained growth highlights the increasing role of services trade as a key contributor to regional economic performance and integration efforts.

Figure 2.3.1   ASEAN exports and imports of services and trade balance (US$ billion), 2015-2024
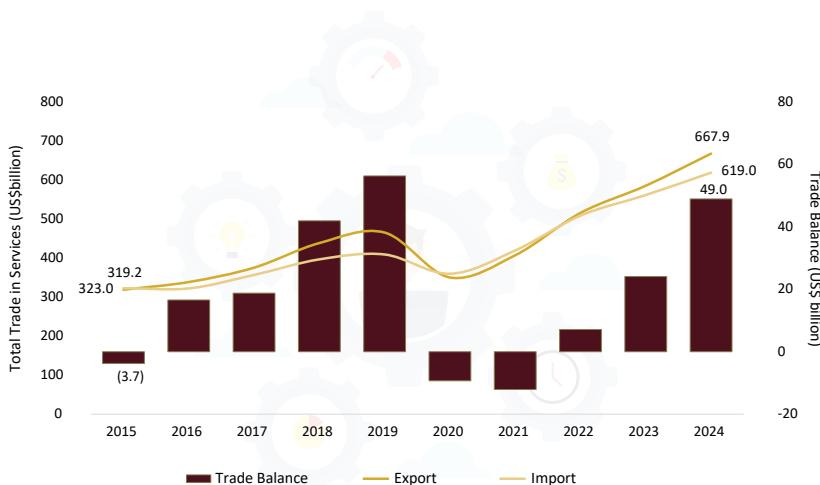
Note   :   Data for Timor-Leste are only available for 2019–2024
Source :   ASEAN Secretariat, ASEANstats database

Figure 2.3.1 also shows a continued upward trend of services trade balance in ASEAN, which has strengthened considerably over the past few years. Following a modest surplus of about US$7.1 billion in 2022, the trade balance increased more than tripled to US$24.1 billion in 2023 and further increased to US$49.0 billion in 2024. This improvement was driven by sustained export growth that consistently outpaced import growth, reflecting growing competitiveness of AMS in services and gradual shift towards becoming a stronger net exporter. The widening surplus underscores the contribution of the services sector to the overall trade performance of ASEAN and its resilience amid global economic uncertainty.

Figure 2.3.2. Trade in Services in ASEAN (Intra-ASEAN and Extra-ASEAN), 2019-2024
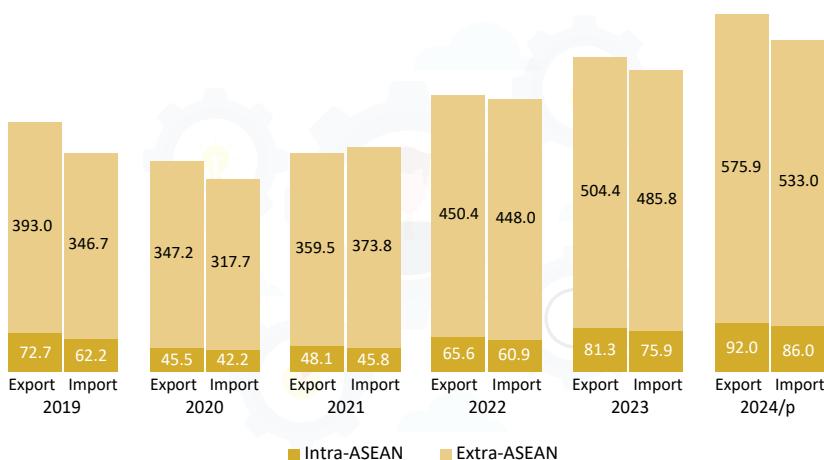
The services trade of ASEAN remained predominantly oriented towards extra-ASEAN partners as presented in Figure 2.3.2, which accounted for about 86% of total services exports and imports in 2024. Extra-ASEAN exports grew by 14.2% to US$575.9 billion, while

imports rose by 9.7% to US$533.0 billion. In comparison, intra-ASEAN trade, though smaller in scale, continued to expand at a robust pace. The share of intra-ASEAN trade in total services flows has gradually increased over the past few years, rising from around 12% in 2022 to nearly 14% in 2024. The steady expansion of intra-ASEAN trade reflects deepening economic integration, with a more connected and integrated services sector.

Figure 2.3.3. Exports and imports of services (US$ billion) by ASEAN Member States, 2024
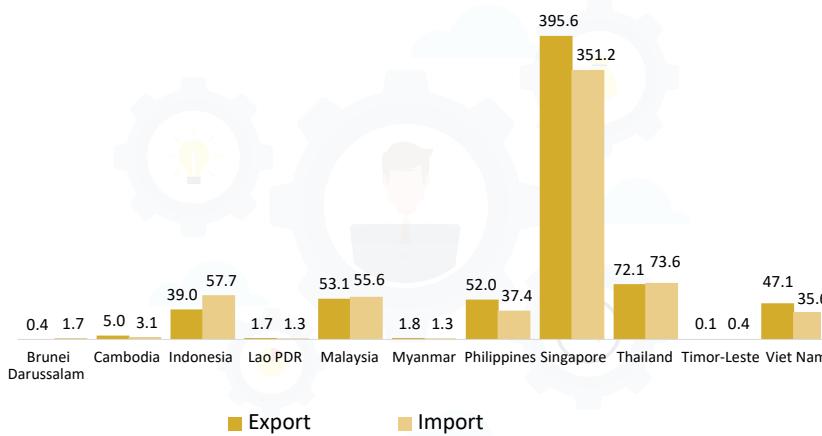
As indicated in Figure 2.3.3, the services trade landscape in 2024 was dominated by Singapore, Thailand, and Malaysia, reflecting the strong competitiveness of their services sectors. Singapore reaffirmed its position as a major services hub, with services exports reaching US$395.6 billion and imports at US$351.2 billion, resulting in a substantial surplus of US$44.5. billion. The Philippines and Viet Nam also maintained strong surpluses of US$14.6 billion and US$11.5

billion, respectively. Smaller but positive balances were observed in Cambodia, Lao PDR, and Myanmar. In contrast, Indonesia recorded the largest deficit among AMS, amounting to US$18.7 billion, followed by Malaysia (US$2.6 billion) and Thailand (US$1.5 billion). Brunei Darussalam and Timor-Leste recorded the smallest trade volumes and remained net importers of services.

Figure 2.3.4. ASEAN exports of services by broad headings (%), 2024

ASEAN total export of services
US$ 667.9 billion

5.0%	Manufacturing services on physical inputs owned by others
7.5%	Telecommunications, computer, and information services
8.6%	Financial Services
19.7%	Travel
24.3%	Transport
26.9%	Other business services
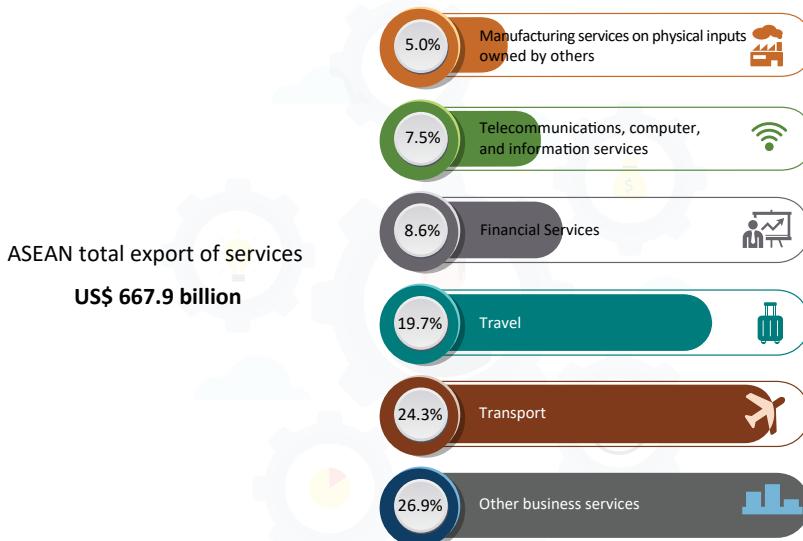
In 2024, ASEAN's services exports were driven by other business services, transport and travel, which together accounted for over 70% of total exports (Figure 2.3.4). Other business services, which include research and development, professional and management consultancy and technical and trade related services, accounted for the largest share at 26.9%, amounting to US$179.6 billion. Transport services ranked second with 24.3% (US$162.3 billion), supported

by the sustained recovery in regional and global logistics activities. Travel services contributed 19.7% (US$131.6 billion), reflecting the sustained recovery of tourism and travel activities post-pandemic. Exports of financial and telecommunications and information services also strengthened, reflecting a growing engagement of AMS in digital and financial innovation.

Figure 2.3.5. ASEAN imports of services by broad headings (%), 2024

ASEAN total import of services
US$ 619.0 billion

4.3%	Financial Services
5.0%	Charges for the use of intellectual property n.i.e
7.7%	Telecommunications, computer, and information services
16.3%	Travel
28.0%	Other business services
32.0%	Transport
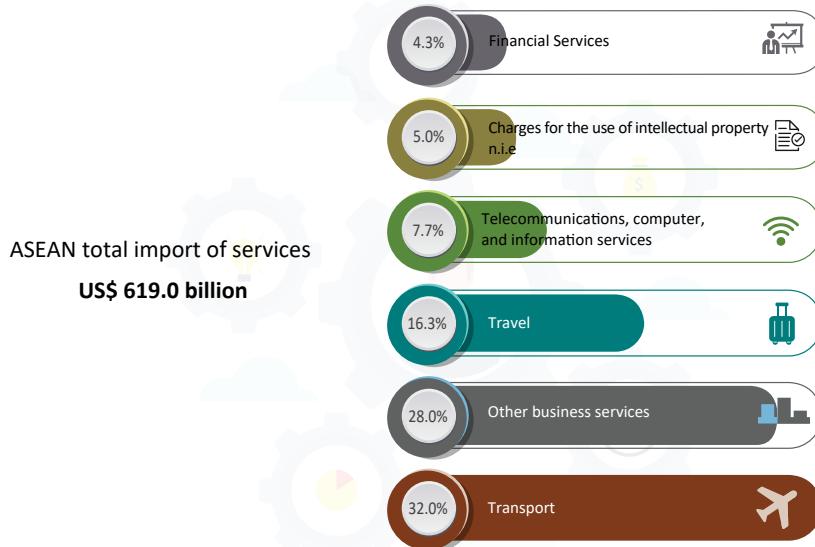
The composition of services imports in 2024 showed a structure broadly consistent with its exports, dominated by transport, business, and travel-related services. As presented in Figure 2.3.5, transport services accounted for the largest share at 32.0% (US$197.9 billion), followed by other business services at 28.0% (US$173.2 billion) and travel at 16.3% (US$101.0 billion). Together, these three sectors represented more than three-quarters of total services

imports. Additionally, notable import shares were also recorded for telecommunications, computer and information services (7.7%) as well as charges for the use of intellectual property (5.0%), reflecting growing engagement of AMS in technology-oriented and innovation-driven activities.

2.4. FOREIGN DIRECT INVESTMENTS

Inward foreign direct investment (FDI) flows to ASEAN continued to strengthen in 2024, reaching US$230.8 billion, an increase of 8.7% from the previous year (Figure 2.4.1). This growth outpaced the global FDI rise of 3.7% during the same period, underscoring the strong performance of ASEAN amid an uncertain global investment climate. Despite fluctuations over the past decade, the region has maintained a solid upward trajectory, with inflows nearly doubling since 2015. The post-pandemic recovery momentum that began in 2021 has been sustained, with FDI inflows consistently exceeding pre-pandemic level. This steady performance reaffirms continued attractiveness of ASEAN to investors and reflects the region's economic resilience and improved investment climate.

Within this broader trend, intra-ASEAN investment has emerged as a dynamic component of regional FDI. In 2024, intra-ASEAN FDI rose sharply by 42.2% to US$32.6 billion, marking its highest level in a decade and a strong rebound from the decline in the previous year. This surge highlights deepening cross-border linkages among ASEAN enterprises and a growing capacity for the region to generate its own investment momentum. While extra-ASEAN investors continue to play a dominant role, contributing US$198.1 billion in 2024, the expanding role of intra-ASEAN investment signals a shift toward greater regional participation and a more balanced investment landscape.

Figure 2.4.1. Inward FDI flows, extra and intra-ASEAN (US$ billion), 2015-2024
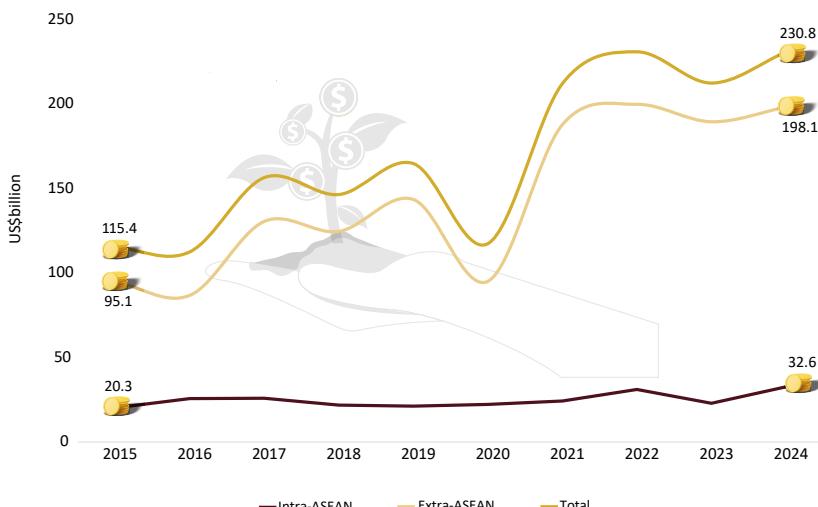
As shown in Figure 2.4.2, inward FDI flows varied widely across AMS, reflecting the diversity of economic structures and investment drivers in the region. Most AMS experienced a rebound after the slowdown in 2020, though the pace of recovery differed. In 2024, Singapore continued to attract the largest share of inward FDI flows to ASEAN, reaching US$143.4 billion, reaffirming its role as the region's financial and business hub. Indonesia, the Philippines, Malaysia, Thailand, and Viet Nam also registered strong performances, with inward FDI flows to Indonesia rose to US$24.2 billion in 2024, while the Philippines, Malaysia and Thailand recorded US$ 9.4 billion, US$11.4 billion, and US$14.7 billion, respectively. Viet Nam maintained steady progress, with inflows increasing to US$20.2 billion during the same period.

Meanwhile, FDI trends across other AMS were more mixed. Cambodia saw continued moderate growth, with inflows rising from US$3.6 billion in 2020 to US$4.4 billion in 2024. In contrast, Lao PDR and Myanmar experienced declines in 2024 after earlier gains. Brunei Darussalam and Timor-Leste continued to record relatively small but stable inward FDI flows, reflecting their smaller economic scale and limited diversification of investment sources.

Figure 2.4.2. Inward FDI flows (US$ billion) by ASEAN Member States, 2020– 2024
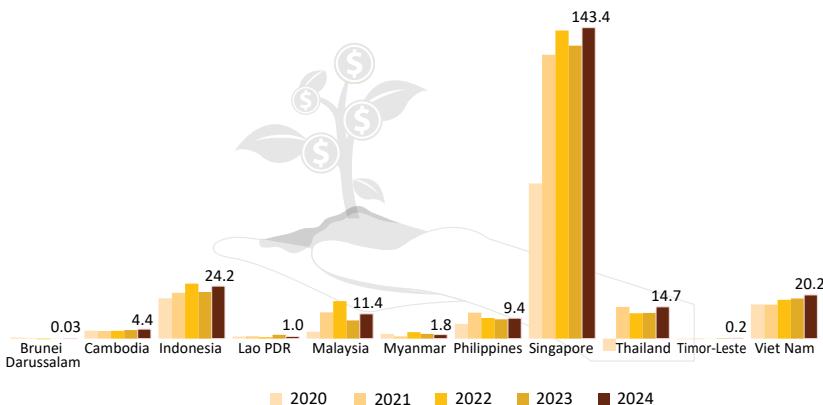
Source : ASEAN Secretariat, ASEANstats database

In 2024, the services industry continued to dominate inward FDI landscape of ASEAN, attracting 75.1% of total inward flows as illustrated in Figure 2.4.3. Among services-related economic activities, financial and insurance activities remained the largest recipient, accounting for 40.3% of total inward FDI flows, followed by wholesale and retail trade (11.2%) and professional, scientific, and technical activities (10.3%). In addition, manufacturing also remained a significant recipient, drawing 19.6% of the region's total

inward FDI flows and maintaining its role as a key driver of regional production and exports. Meanwhile, investment in the primary industry remained limited, with inflows of US$4.0 billion, accounting for just 1.8% of total inward FDI flows in ASEAN.

Figure 2.4.3. Inward flows of FDI by activity, 2024
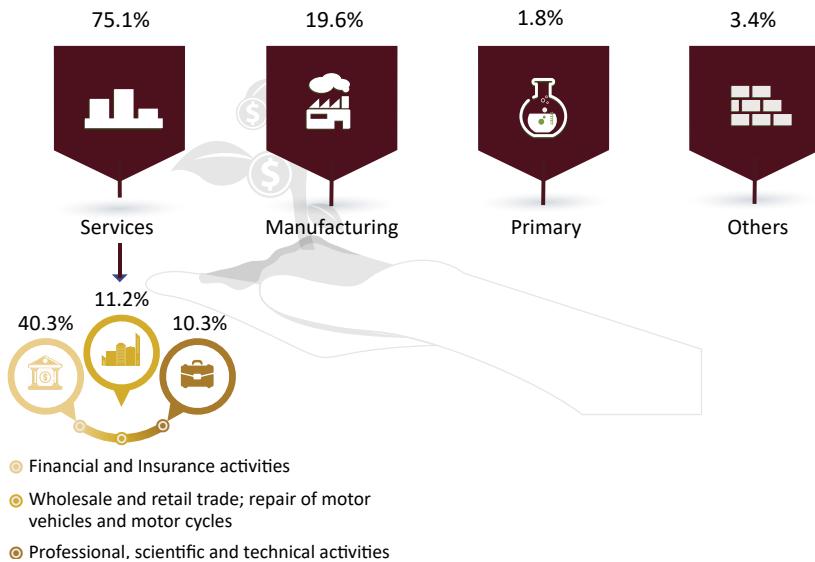
75.1%	19.6%	1.8%	3.4%
Services	Manufacturing	Primary	Others

40.3%   11.2%   10.3%

⊚ Financial and Insurance activities
⊚ Wholesale and retail trade; repair of motor vehicles and motor cycles
⊚ Professional, scientific and technical activities

Note   :   The ASEAN aggregate value excludes Timor–Leste due to the unavailability of data on the FDI by activity
Source :   ASEAN Secretariat, ASEANstats database

Figure 2.4.4 shows the top five sources of inward FDI in ASEAN in 2024, which collectively contributed nearly 58% of the region's total inflows. The United States remained the largest investor, providing US$42.3 billion, or 18.3% of total FDI. Intra-ASEAN investment maintained a strong position as the second-largest source of FDI in 2024, reaching US$32.6 billion and accounting for 14.1% of total inflows. China and the European Union followed closely, contributing

US$20.0 billion (8.7%) and US$19.9 billion (8.6%), respectively. The fifth-largest FDI source was the United Kingdom, with US$18.8 billion, representing 8.2% of total inward FDI in ASEAN.

Inward FDI flows from the top sources in ASEAN displayed broadly similar patterns across economic activities, albeit with some variations in their sectoral focus. The United States as the largest investor concentrated in financial and insurance activities, accounting for over 80% of its total investment. Intra-ASEAN investment was more diversified, with manufacturing receiving the largest share at 31.0%, followed by financial services and information and communication. Chinese FDI was similarly focused on manufacturing (35.8%), while the European Union directed one-third of its investment into financial and insurance activities, alongside substantial investments in wholesale and retail trade and manufacturing. The United Kingdom focused heavily on wholesale and retail trade (63.1%) and financial services (43.1%) of its total FDI in ASEAN. These trends demonstrate

Figure 2.4.4. ASEAN top-5 FDI sources, 2024
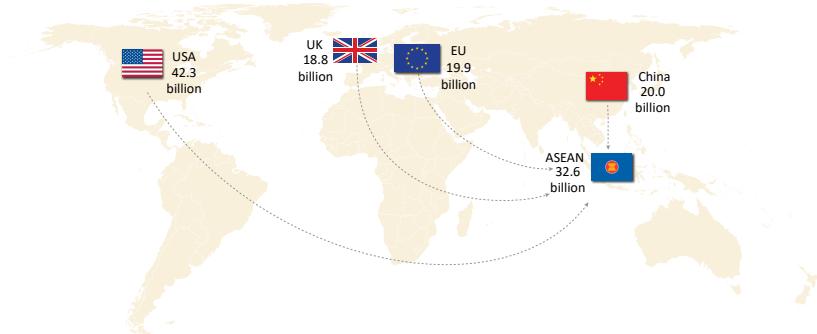
Note   :   The ASEAN aggregate value excludes Timor-Leste due to the unavailability of data on the FDI by source countries
Source :   ASEAN Secretariat, ASEANstats database

how major FDI partners shape the region's economic landscape, combining shared investment interests with differentiated engagement across economic activities.

2.5. VISITOR ARRIVALS

Figure 2.5.1 underscores the robust rebound of tourism sector in ASEAN, which is steadily recovering from the unprecedented impact of the COVID-19 pandemic. Total visitor arrivals, which had plummeted from 143.7 million in 2019 to just 3.0 million in 2021 due to strict travel restrictions, surged to 102.0 million in 2023 and further climbed to 127.2 million in 2024. This sustained recovery signals not only the resilience of the sector but also a confident outlook for further progress.

Figure 2.5.1. Number of visitor arrivals in ASEAN (million persons), 2019-2024
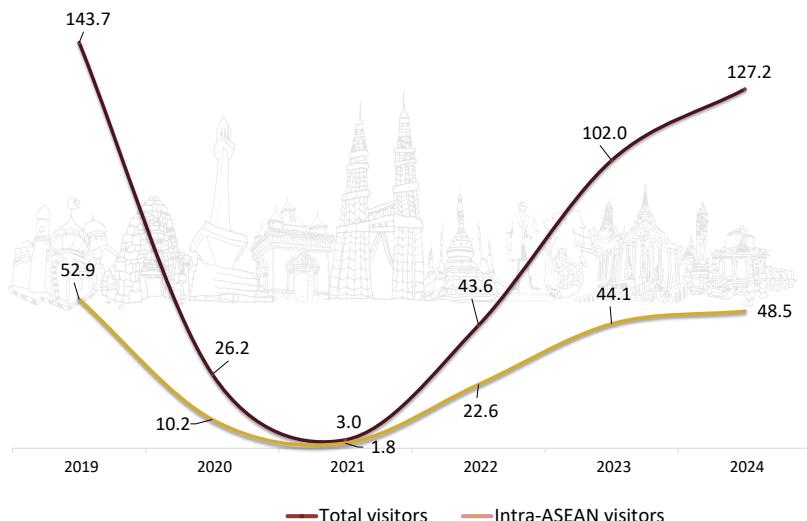
Source : ASEAN Secretariat, ASEANstats database

Figure 2.5.1 also demonstrates that intra-ASEAN travel has mirrored the broader tourism recovery, signaling renewed confidence in regional mobility. Visitor numbers fell sharply from 52.9 million in 2019 to 1.8 million in 2021 but rose steadily to 22.6 million in 2022, 44.1 million in 2023, and 48.5 million in 2024. The strong rebound of regional tourism highlights the central role of intra-ASEAN travel in supporting the sector and signals promising prospects for further expansion.

Figure 2.5.2 illustrates how regional visitors remained the backbone of ASEAN tourism in 2024, driving a significant portion of total arrivals. Intra-ASEAN travelers accounted for 38.1% of the total visitors in ASEAN, highlighting the sustained importance of regional mobility in supporting the sector. China remained the largest non-ASEAN source of visitors in 2024, contributing 20.4 million arrivals, or 16.1% of the total. The Republic of Korea followed with 10.0 million visitors (7.8%), while the European Union accounted for 8.8 million (6.9%). India and Australia also made notable contributions, with 5.9 million

Figure 2.5.2. Top-5 country source of visitor arrivals from non-ASEAN countries (million persons), 2024

| 20.4 million | 10.0 million | 8.8 million | 5.9 million | 4.9 million |
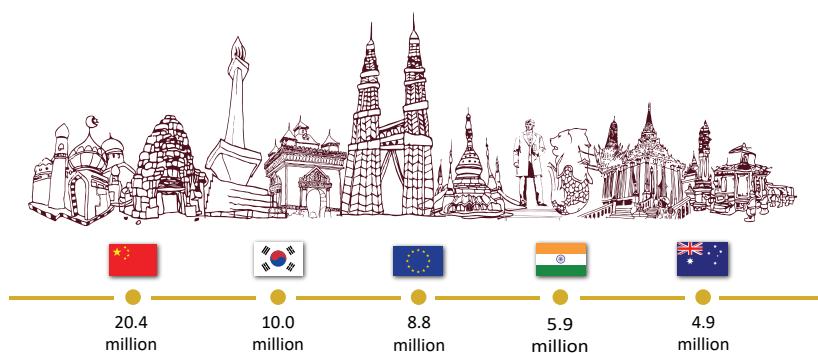
Source : ASEAN Secretariat, ASEANstats database

(4.6%) and 4.9 million (3.9%) visitors. The combination of strong intra-ASEAN travel and significant international arrivals underscores ASEAN tourism's robust recovery and its continued attractiveness to a wide range of markets.

Figure 2.5.3. Number of visitor arrivals (thousand person) by ASEAN Member States, 2024
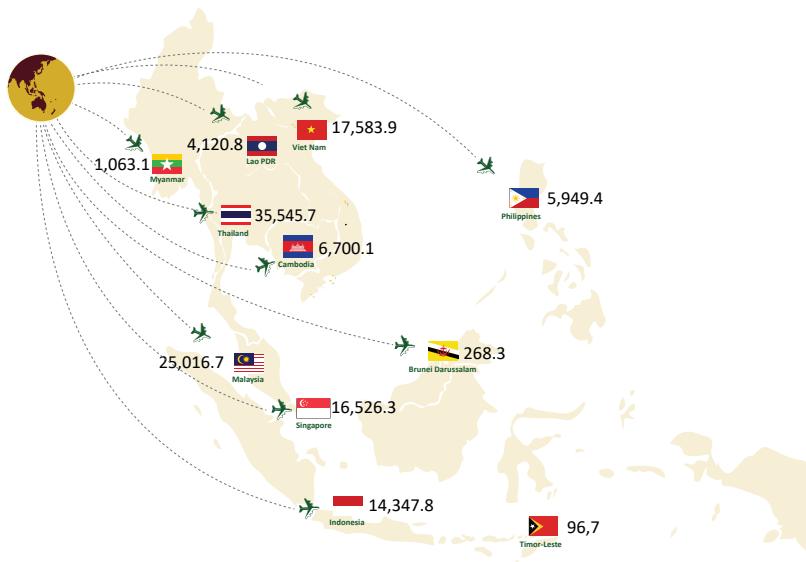
Source : ASEAN Secretariat, ASEANstats database

As illustrated in Figure 2.5.3, the tourism recovery in 2024 was evident across all AMS, with several countries recording strong visitor numbers. Thailand remained the most visited destination in ASEAN, attracting 35.5 million visitors, which accounted for 27.9% of total arrivals in the region, highlighting the continued strength and international appeal of its tourism sector. Malaysia followed with 25.0 million arrivals (19.7%), reflecting its sustained position as a

key tourism hub. Viet Nam welcomed 17.6 million visitors (13.8%), while Singapore recorded 16.5 million arrivals (13.0%) and Indonesia attracted 14.3 million arrivals (11.3%). Other AMS also made notable contributions, with Cambodia hosted 6.7 million visitors (5.3%) and the Philippines received 5.9 million visitors (4.7%). AMS with smaller arrival share, including Lao PDR (4.1 million, 3.2%), Myanmar (1.1 million, 0.8%), Brunei Darussalam (0.3 million, 0.2%), and Timor-Leste (0.1 million, 0.1%), together accounted for the remaining share, reflecting their relatively small size yet steady contribution to regional tourism flows.

Environment and Natural Resources

3. ENVIRONMENT AND NATURAL RESOURCES

Environmental sustainability and the responsible use of natural resources are essential for supporting long-term development in the world, including ASEAN. Key sectors such as transport, energy, agriculture, and forestry shape how resources are used and how ecosystems are managed across the region. This chapter presents selected indicators from these four sectors to provide an overview of ASEAN's environmental and natural resource landscape. Together, these indicators offer insights into the region's progress toward more sustainable, efficient, and environmentally responsible development.

3.1. TRANSPORT

The efforts to develop an integrated multimodal transport network are crucial to ensuring that logistics systems keep pace with growing economic demands. Such integration enhances cross-border connectivity, supports the development of regional transport corridors, and reinforces ASEAN's attractiveness as an investment destination. Ultimately, well-connected and technologically enabled transport systems play a vital role in strengthening the region's competitiveness, promoting sustainability, and supporting long-term economic growth.

This section will describe the progress of transportation development in ASEAN, particularly the road infrastructure, the number of registered vehicles, and air transport indicators related to the number of international and domestic passengers during 2015–2024.

Land transport

Total road length, a key measure of land connectivity, is defined as the total kilometers of all roads within a country in a given year, excluding dedicated cycle paths. Over the past decade, the total road length in ASEAN had expanded to 2.5 million kilometers, a substantial increase from 1.9 million kilometers in 2015, with an average annual growth rate of 4.7%. During the period of 2015 to 2024, significant increases in road length were observed in Viet Nam (8.1%), Thailand (6.1%), Malaysia (3.4%), and Cambodia (2.0%). In contrast, Myanmar, Singapore, Brunei Darussalam, Indonesia, Lao PDR, and the Philippines recorded more modest growth rates, ranging from 0.1% to 1.0% per annum.

In 2024, Thailand, Viet Nam, Indonesia, and Malaysia were the largest contributors to ASEAN's total road length, accounting for 28.2%,

Figure 3.1.1. Road length (thousand kilometers) by ASEAN Member States, 2015 and 2024
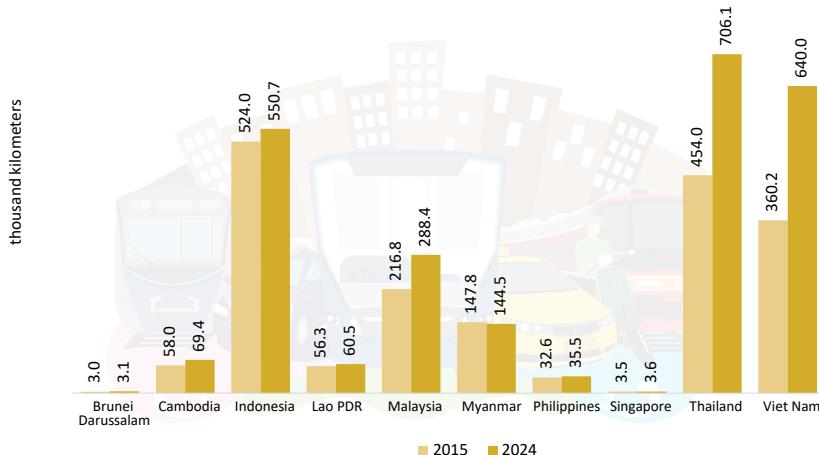
Note : The latest available data for Indonesia and Singapore is 2023, Viet Nam is 2020, Timor-Leste is not available at the time of publication
Source : ASEAN Secretariat, ASEANstats database

25.6%, 22.0%, and 11.5% respectively. Together, these four countries accounted for 2.2 million kilometers of road length, contributing approximately 87.3% of the region's total (Figure 3.1.1).

During the same period, ASEAN recorded a notable increase in the number of motor vehicles across the region. In 2024, the total stock of registered road motor vehicles reached 252.4 million units, up from 203.5 million in 2015, corresponding to an average annual growth rate of 2.5%. This figure reflects all motor vehicles registered and licensed for use on public roads, including vehicles exempt from annual taxes or license fees, imported second-hand vehicles, and country-specific vehicle types such as tuk-tuks, tricycles, and bajajs, while excluding military vehicles. Indonesia continued to hold the largest share in 2024 with 139.6 million units or 55.3% of the regional total.

Figure 3.1.2. Number of registered motor vehicles per 1,000 population by ASEAN Member States, 2015 and 2024

Total per 1,000 population

	2015	2024
Brunei Darussalam	948	1,128
Cambodia	26	24
Indonesia	473	496
Lao PDR	257	413
Malaysia	843	1,115
Myanmar	103	118
Philippines	86	130
Singapore	173	165
Thailand	546	640
Viet Nam	23	41

■ 2015 ■ 2024
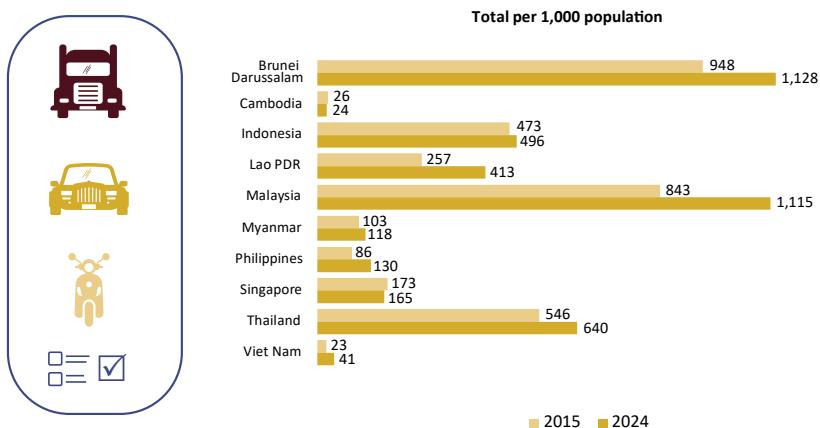
Note : The latest available data for Singapore is 2023, Viet Nam is 2020, Timor-Leste is not available at the time of publication
Source : ASEAN Secretariat, ASEANstats database

Thailand followed with 44.9 million units (17.8%), Malaysia with 38.0 million units (15.0%), and the Philippines with 14.6 million units (5.8%). The combined population of these four countries contributed approximately 93.9% of the region's total registered road motor vehicles.

From 2015 to 2024, the total number of registered road motor vehicles per 1,000 population also increased (Figure 3.1.2.). In 2024, Brunei Darussalam reported the highest number of registered motor vehicles at 1,128 per 1,000 population, followed by Malaysia and Thailand with 1,115 and 640 per 1,000 population, respectively, which together accounted for 67.5% of the region's total.

Air transport

The total number of international air passengers encompasses travelers arriving in a country from abroad as well as those departing for international destinations. In 2024, ASEAN recorded approximately 270.7 million international air passengers, up from 231.6 million in 2015, an average annual increase of 58.9%. Thailand, Singapore, Malaysia, Indonesia, and the Philippines collectively accounted for more than 90% of the region's international air passenger movements.

Domestic air passenger traffic refers to passengers travelling between airports within the same country in a given year. During the period observed, ASEAN's domestic passenger volume grew from 255.4 million in 2015 to 286.5 million in 2024. Indonesia remained the largest domestic aviation market, handling 65.8 million passengers or 23.0% of the regional total, followed by the Philippines (22.2%), Thailand (21.9%), Malaysia (16.4%), and Viet Nam (15.2%).

Figure 3.1.3. Number of international and domestic air passengers (thousand persons) by ASEAN Member States, 2015 and 2024

International air passengers

thousand persons

	Brunei Darussalam	Cambodia	Indonesia	Lao PDR	Malaysia	Myanmar	Philippines	Singapore	Thailand	Viet Nam
2015	1,717	5,606	25,212	1,073	40,017	3,428	21,075	54,836	60,594	18,066
2024	1,265	4,916	36,101	2,220	50,283	2,063	29,914	58,946	77,742	7,233

2015 2024

thousand persons

Domestic air passengers

	Cambodia	Indonesia	Lao PDR	Malaysia	Myanmar	Philippines	Thailand	Viet Nam
2015	436	76,630	495	45,931	2,097	44,697	62,624	22,476
2024	196	65,821	1,400	46,880	2,336	63,484	62,857	43,513

Note   :   The latest available data of Cambodia, Myanmar, and Singapore is 2023, Viet Nam is 2020, Timor-Leste is not available at the time of publication
Source :   ASEAN Secretariat, ASEANstats database

3.2. ENERGY

Reliable, modern, and sustainable energy systems are essential pillars of the broader sustainable development agenda. Tracking access to basic energy services, such as electricity, and the use of clean fuels and technologies illustrates how effectively current energy infrastructure meets household needs. At the same time, the share of renewable energy in total final energy consumption provides insight into the transition toward cleaner and more sustainable energy sources. These indicators provide a comprehensive view of progress in expanding energy access while advancing long-term environmental and development objectives.

Access to electricity

Electricity is one of basic enablers of modern social and economic activity, supporting improved livelihoods and broader development outcomes. The share of the population with access to electricity serves as a key indicator of how widely essential energy services are being delivered. Strengthening access to electricity plays a key role in promoting inclusive growth and supporting long-term sustainable development.

Figure 3.2.1 illustrates the steady expansion of electricity access across ASEAN. Brunei Darussalam and Singapore already achieved full coverage providing electricity to be accessible by all households. Several other AMS were close to universal access, with Indonesia at 99.8% of its population, Malaysia and Thailand at 99.7% and Viet Nam at 99.9%. Furthermore, Cambodia and Lao PDR also made notable progress, reaching 93.0% and 96.5% respectively, reflecting

Figure 3.2.1.   Population with access to electricity (%) by ASEAN Member States, 2016 and 2024
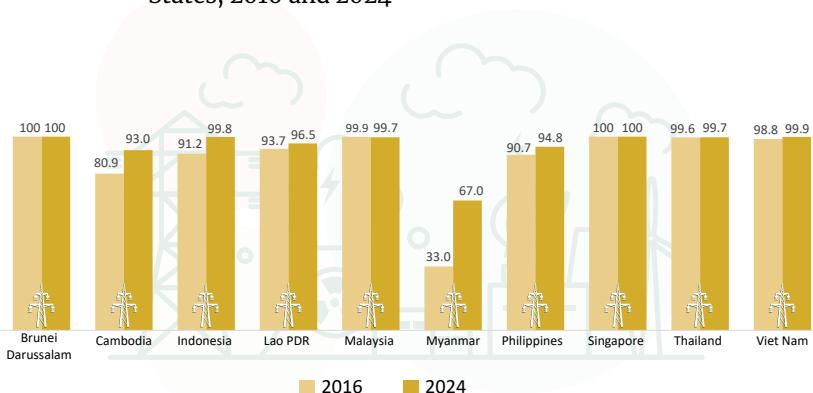
continued investment in energy infrastructure. The Philippines recorded an increase from 90.7% in 2016 to 94.8% in 2024, showing steady improvement in household electricity access.

Despite these regional gains, Myanmar continued to face significant challenges. Although access to electricity grew from 33.0% in 2016 to 67.0% in 2024, the level remains well below full coverage. This persistent gap highlights the importance of targeted policies and accelerated infrastructure development. Overall, ASEAN is moving closer to universal electricity access, though focused efforts are still needed to ensure that every community benefits from reliable electricity.

Clean Fuels and Technologies

Sustainable energy consumption is also closely related to people's access to safe and efficient fuels and technologies for essential household needs such as cooking, heating, and lighting. The use of clean energy sources is critical for reducing health risks associated with indoor air pollution, as highlighted in the WHO Guidelines for Indoor Air Quality: Household Fuel Combustion. The share of the population primarily relying on clean fuels and technologies is measured as the percentage of people using these fuels and technologies for cooking, heating, and lighting out of the total population that reports using any energy sources for these purposes. Tracking this indicator provides valuable insight into progress toward healthier, more sustainable household energy use across the ASEAN region.

Figure 3.2.2 presents the share of the population with primary reliance on clean fuels and technologies for cooking across AMS. Clean fuels and technologies include electricity, natural gas, liquefied petroleum gas, biogas, ethanol, and solar. Overall, most AMS have

Figure 3.2.2. Population with primary reliance on clean fuels and technology for cooking (%), ASEAN Member States, 2015 and 2023
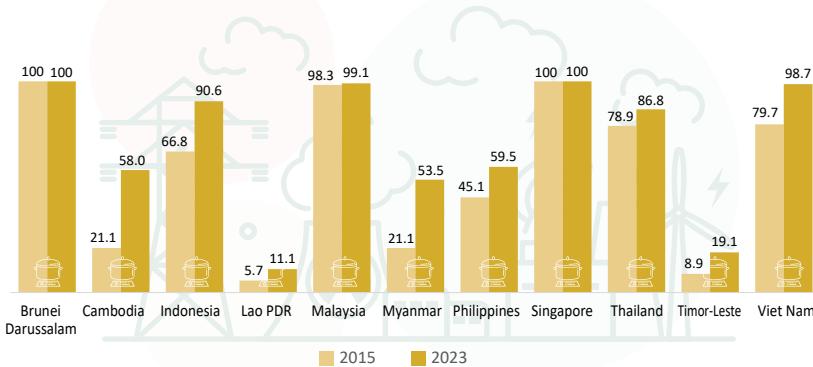
made notable progress in adopting clean cooking solutions, although the pace of shift varied across countries. In 2023, Brunei Darussalam and Singapore continued to maintain universal access, with 100% of households relying on clean fuels and technologies. Meanwhile, in the period of 2015-2023 Viet Nam and Indonesia recorded substantial progress with the shares of households relying on clean fuels and technology increased from 79.7% to 98.7% in Viet Nam and from 66.8% to 90.6% in Indonesia. Additionally, Thailand also grew from 78.9% to 86.8%, while Malaysia also continued to improve over the same period, with the share rising from 98.3% to 99.1%.

Despite these advancements, other AMS still face significant challenges. Cambodia and Myanmar achieved moderate gains, with 58.0% and 53.5% of their populations using clean cooking fuels in 2023, respectively. Furthermore, the Philippines demonstrated gradual improvement, reaching 59.5% in 2023. Meanwhile, Lao PDR (11.1%) and Timor-Leste (19.1%) reported the lowest coverage, highlighting the need for targeted efforts to expand access to clean cooking technologies in these countries.

Renewable energy

Renewable energy refers to sources of energy that are naturally replenished and can be used without reducing their availability for the future. It encompasses energy derived from hydro, wind, solar, geothermal, marine, and various forms of bioenergy, including solid and liquid biofuels as well as biogas and renewable waste. This indicator highlights the actual consumption of renewable energy within a country, rather than its installed production capacity.

Figure 3.2.3 presents the latest available data on renewable energy shares to total energy consumption, revealing significant disparities across AMS. Cambodia continued to lead with a high share of renewable energy at 61.1%, closely followed by Lao PDR at 50.0%, despite the slight drop in its share. In contrast, Brunei Darussalam, Malaysia, and Singapore continued to register low share of the use of renewable energy at 0.02%, 2.0%, and 1.3%, respectively. Renewable energy shares in Myanmar and the Philippines decreased to 45.4%

Figure 3.2.3. Renewable energy share in the total final energy consumption (%), ASEAN Member States, 2016 and 2024
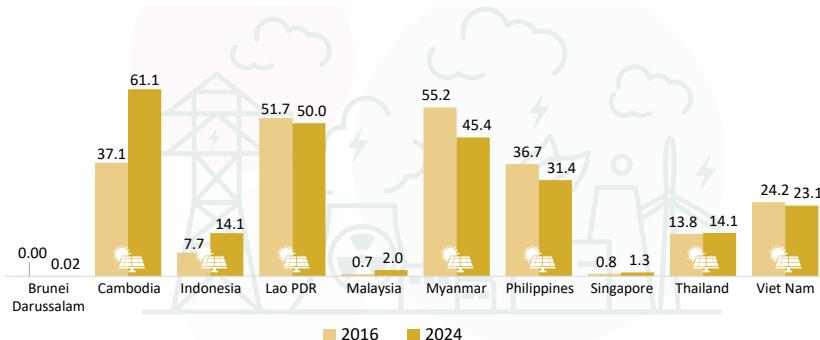
Note   :   The latest available data for Brunei Darussalam and Lao PDR is 2021, Cambodia, Malaysia, and Singapore is 2022, Thailand and Viet Nam is 2023, Timor-Leste is not available at the time of publication
*Source :   ASEAN Secretariat, ASEANstats database*

and 31.4%, respectively, in 2024. Other AMS, including Indonesia, Thailand, and Viet Nam, reported moderate shares, with renewable energy accounting for 14.1% to 23.1%, respectively.

3.3. AGRICULTURE

Agricultural production across ASEAN has remained steady over the past decade, with key crops, namely, paddy, cassava, and maize, continuing to provide an important foundation for regional food systems and related value chains. From 2015 to 2024, output levels showed stability, underscoring ongoing efforts to balance productivity with sustainable land and resource management.

Figure 3.3.1. Production of ASEAN Major Food Commodities (million metric ton), 2015-2024
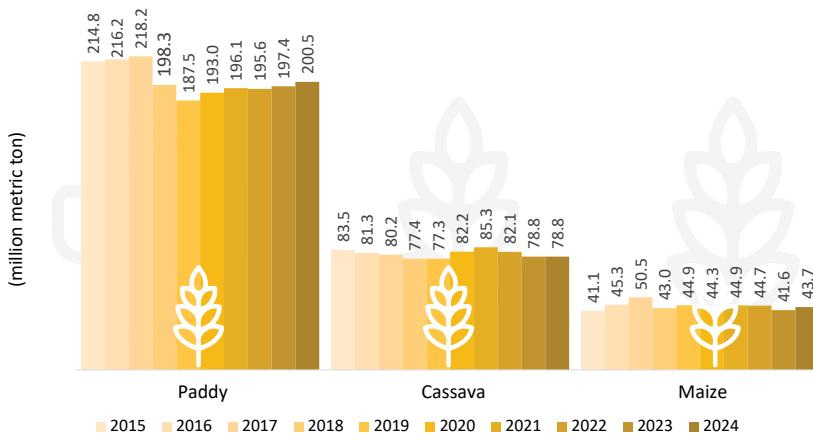

Sources : ASEAN Food Security Information System (AFSIS) and Food and Agriculture Organization (FAO)

Figure 3.3.1 illustrates that paddy remains the region's predominant crop, with annual production consistently exceeding 190 million metric tons over the past decade. Paddy production remained the

cornerstone of ASEAN's agricultural landscape and a key contributor to regional food availability. In 2024, ASEAN's paddy production is projected to reach 200.5 million tons, an increase of 3.1 million tons, or 1.57%, compared with the 197.4 million tons estimated for 2023. This outlook assumes normal climatic conditions and the absence of major natural disruptions. With projected improvements in harvested area or yield, paddy output is expected to rise across all Member States, with notable gains anticipated in Cambodia, Indonesia, Myanmar, the Philippines, Thailand, and Viet Nam.

Cassava production remained within a stable range of 77 to 84 million tons, underpinning its role in food consumption and industrial processing. Maize production, while smaller in volume, increased gradually from 41.1 million tons in 2015 to 43.7 million tons in 2024, in line with rising demand from the feed sector. These production patterns reflect a stable agricultural landscape in ASEAN, with sustained outputs of major crops that contribute to food availability, economic activity, and rural livelihoods across the region.

Figure 3.3.2. Production of Major Food Commodities in ASEAN (million metric tons), 2024
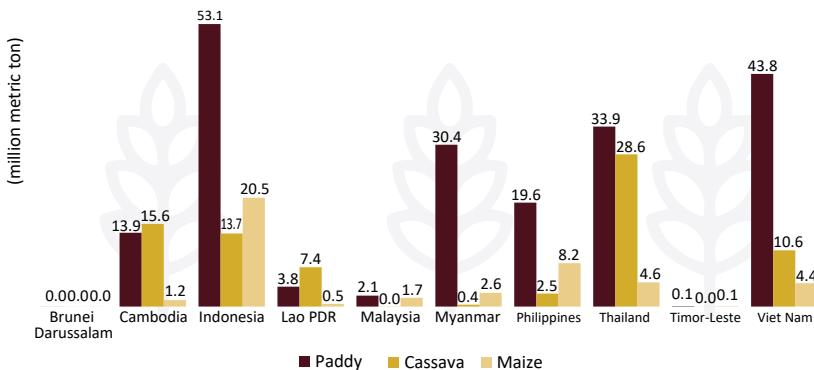
Sources : ASEAN Food Security Information System (AFSIS) and Food and Agriculture Organization (FAO)

The regional production landscape remains highly concentrated. In 2024, paddy production in ASEAN was dominated by Indonesia, Viet Nam, Thailand, Myanmar, the Philippines, and Cambodia, which together accounted for 97.1 percent of ASEAN's total output. A similar pattern is observed for cassava, where Thailand, Indonesia, Cambodia, and Viet Nam together contributed 86.9 percent of regional production. For maize, Indonesia remained the leading producer in 2024, with an estimated 20.5 million tons, representing 46.9 percent of ASEAN's total maize output. This distribution highlights the central role of a few Member States in shaping the region's overall agricultural production landscape.

3.4. FORESTRY

Forest area

Forests are essential for life on Earth, providing habitats for countless species and helping regulate the global carbon cycle by absorbing carbon dioxide and curbing climate change. In addition to their ecological importance, forests support human well-being by supplying clean water, fertile soil, and stabilizing local climates, which are vital for agriculture, livelihoods, and resilience to environmental challenges. Monitoring changes in forest cover is therefore crucial not only for conserving ecosystems but also for maintaining socio-economic stability. The share of forest area relative to total land area serves as an important indicator of progress toward sustainable development, reflecting efforts to balance environmental conservation with human needs.

Figure 3.4.1 shows the latest available data on the proportion of forest area to total land area in ASEAN, highlighting varied trends among AMS. In 2024, Brunei Darussalam remained the country with

the highest forest coverage, with 72.1% of its lands, and maintained relatively stable forest cover. Meanwhile, Indonesia recorded a slight increase from 50.5% in 2016 to 51.1% in 2024, reflecting gradual progress in forest conservation.

Figure 3.4.1. Forest area as a proportion of total land area (%), ASEAN Member States, 2016 and 2024
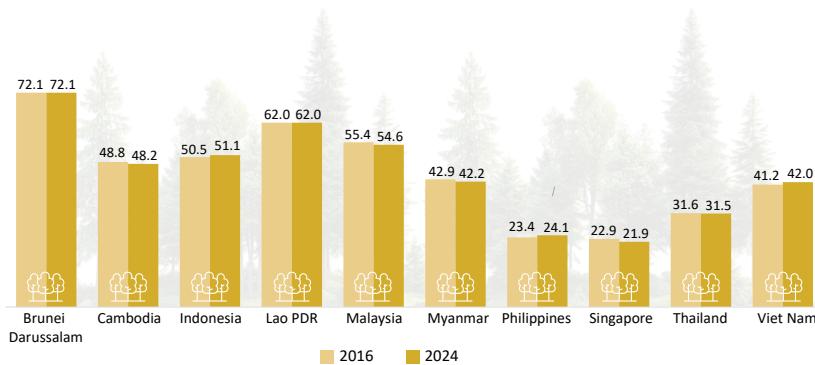
However, some countries experienced minor declines. Myanmar's forest coverage decreased from 42.9% in 2016 to 42.2% in 2024, Malaysia dropped slightly from 55.4% to 54.6% (latest data in 2020), and Cambodia's share fell from 48.8% to 48.2% (latest data in 2018). Singapore also saw a small decline from 22.9% to 21.9% by 2020. In contrast, in the same period, Viet Nam and the Philippines made modest gains, with forest cover increased from 41.2% to 42.0% and from 23.4% to 24.1% (2020), respectively. Overall, these trends underscore the continuing need for sustainable forest management efforts across all AMS.

Red List Index

Protecting species from extinction remains a global priority, aimed at reducing habitat degradation, halting biodiversity loss, and safeguarding threatened species. The Red List Index (RLI) is a key tool for monitoring progress in this area, tracking changes in the risk of extinction across different groups of species. The RLI records genuine shifts in species' extinction risk as categorized by the International Union for Conservation of Nature (IUCN) Red List of Threatened Species. The index ranges from 1, when all species are classified as 'least concern' and face minimal extinction risk, to 0, where all species are considered 'extinct.' The index helps to identify both the progress made in protecting species and the areas where urgent conservation measures are still necessary.

Figure 3.4.2. Red List Index, ASEAN Member States, 2024

Country	RLI
Brunei Darussalam	0.85
Cambodia	0.79
Indonesia	0.75
Lao PDR	0.83
Malaysia	0.69
Myanmar	0.79
Philippines	0.59
Thailand	0.86
Timor-Leste	0.84
Viet Nam	0.70
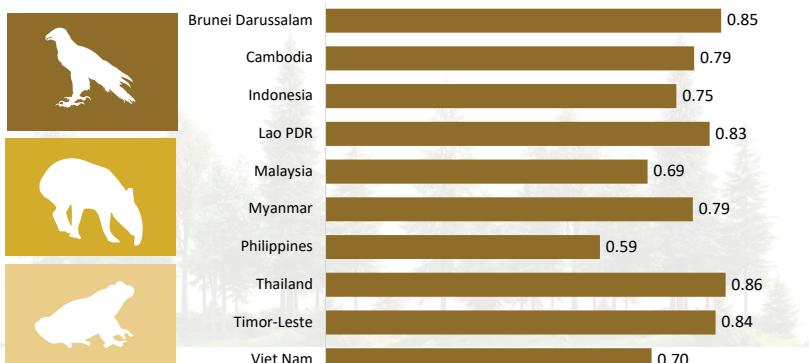
Note   :   The indicator is not relevant to Singapore, hence the data is not available
Sources :   ASEAN Secretariat, ASEANstats database and UNstats – SDG Global Database

Figure 3.4.2 shows the RLI of AMS in 2024, offering insight into the relative risk of species extinction across the region. Thailand reported the highest RLI at 0.86, closely followed by Brunei Darussalam (0.85),

Lao PDR (0.83), and Timor-Leste (0.84), indicating relatively lower overall risks to species survival. On the other hand, the Philippines recorded the lowest RLI at 0.59, reflecting relatively greater threats to its biodiversity. Other AMS show moderate scores, with Cambodia (0.79), Myanmar (0.79), Indonesia (0.75), Viet Nam (0.70), and Malaysia (0.69) illustrating varying levels of species conservation progress.

REFERENCES

International Labour Organization (ILO). (2016). *Key Indicators of the Labour Market, Ninth Edition.* International Labour Office. Geneva, Switzerland.

International Monetary Fund (IMF). (2025). *World Economic Outlook (WEO) World Economic Outlook: Global Economy in Flux, Prospects Remain Dim.* Washington, DC. October.

United Nations Conference on Trade and Development (UNCTAD). (2023). *Trade in ICT goods statistics: Impacts of the 2022 update to the Harmonized Commodity Description and Coding System. UNCTAD Technical Notes on ICT for Development No. 20.* Available at https://unctad.org/system/files/official-document/tn_unctad_ict4d20_en.pdf

ASEAN: A Community of Opportunities for All

www.asean.org

asean

asean secretariat