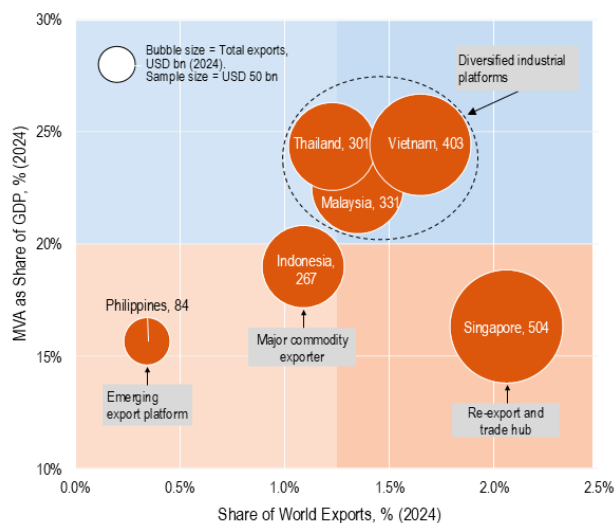


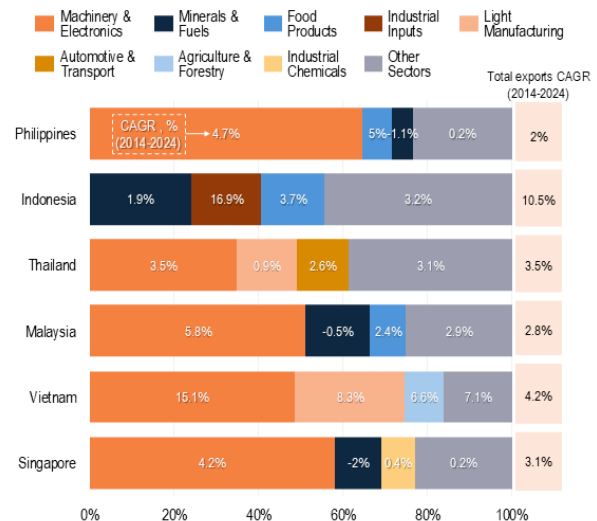
ASEAN-6: Diversified Industrial Engines of Southeast Asia

Combining high-tech export platforms (Vietnam, Malaysia, Thailand), scale-driven domestic markets (Indonesia, Philippines) and a global trade hub (Singapore), ASEAN-6 is a uniquely diversified industrial ecosystem spanning commodities, electronics, automotive manufacturing and logistics.

ASEAN-6: Manufacturing Value Added (MVA) as Share of GDP, %
Exports, USD bn and Share of World Exports, % (2024)



ASEAN-6: Top 3 Export Composition and Sector Growth, % of Total Exports (2024) and CAGR (2014-2024)



Note: Share of world exports includes goods exports and reflects both domestic production and re-export activity (notably Singapore). Source: World Bank, UN Comtrade, UNCTAD, ANDAMAN PARTNERS Analysis

ASEAN-6 stands out as one of the world's most strategically complementary industrial groupings, combining high-tech export manufacturing, commodity-linked production bases and a globally connected logistics hub. Together, Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam form a diversified ecosystem spanning machinery and electronics, automotive supply chains, resource-based industries and trade intermediation.

The region's manufacturing intensity varies widely, from highly industrialised export platforms such as Vietnam (MVA 24% of GDP) and Thailand (24%) to more domestically anchored economies such as the Philippines (16%) and Indonesia (19%). Export scale is substantial across the bloc, led by Singapore (USD 504 billion), Vietnam (USD 403 billion), Malaysia (USD 331 billion) and Thailand (USD 301 billion).

Vietnam is the standout high-tech engine, with machinery and electronics dominating exports and driving a 4.2% CAGR in total export growth (2014-2024). Malaysia and Thailand have similarly diversified industrial platforms, combining machinery and electronics with automotive and industrial supply-chain exports, though growth rates are slower (2.8% and 3.5%). Indonesia remains ASEAN's commodity anchor, with minerals and fuels contributing heavily to exports and the bloc's fastest export growth (10.5% CAGR 2014-2024).

The Philippines is smaller in scale (USD 84 billion in exports) but shows steady momentum, led by machinery and electronics with a 4.7% CAGR. Singapore remains the region's trade hub, combining large export value with a lower manufacturing share of GDP (17%), reflecting its re-export and logistics role.

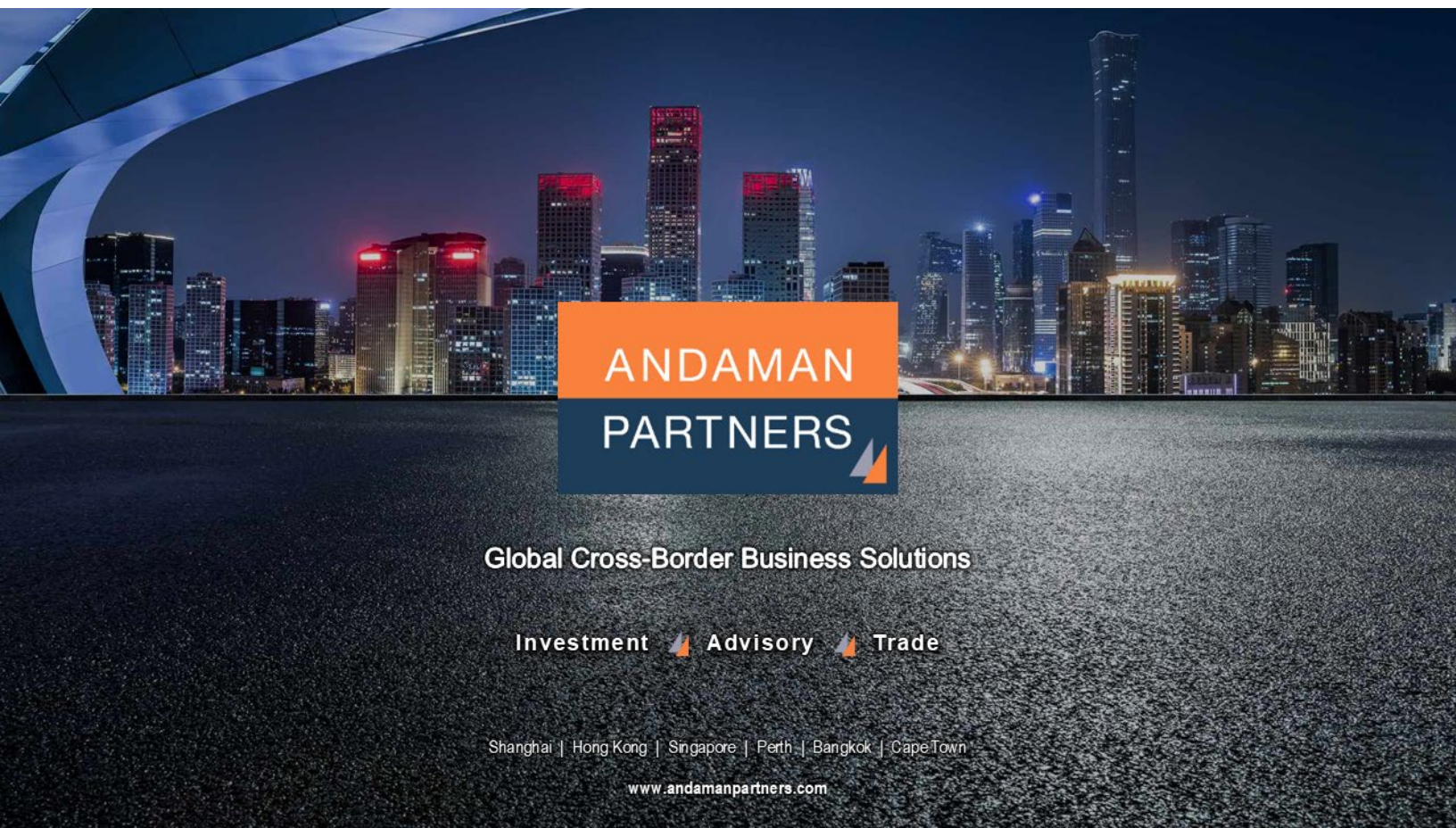


For global procurement managers, ASEAN-6's key advantage is its optionality: diversified supplier bases, deepening industrial clusters and the ability to combine cost-competitive manufacturing with reliable trade connectivity. The bloc is increasingly positioned as a core sourcing region for machinery and electronics, industrial components and automotive supply chains, while Indonesia strengthens upstream resilience in energy and materials.

Also by ANDAMAN PARTNERS:

- [Trade Crossroads of the World: The Strategic Rise of ASEAN's Exports](#)
- [ASEAN's 4-Trillion-Dollar Trade System: East-West Crossroads of Global Commerce](#)
- [ASEAN's 4-Trillion-Dollar Trade System: Balancing Regional Integration and Global Reach](#)

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