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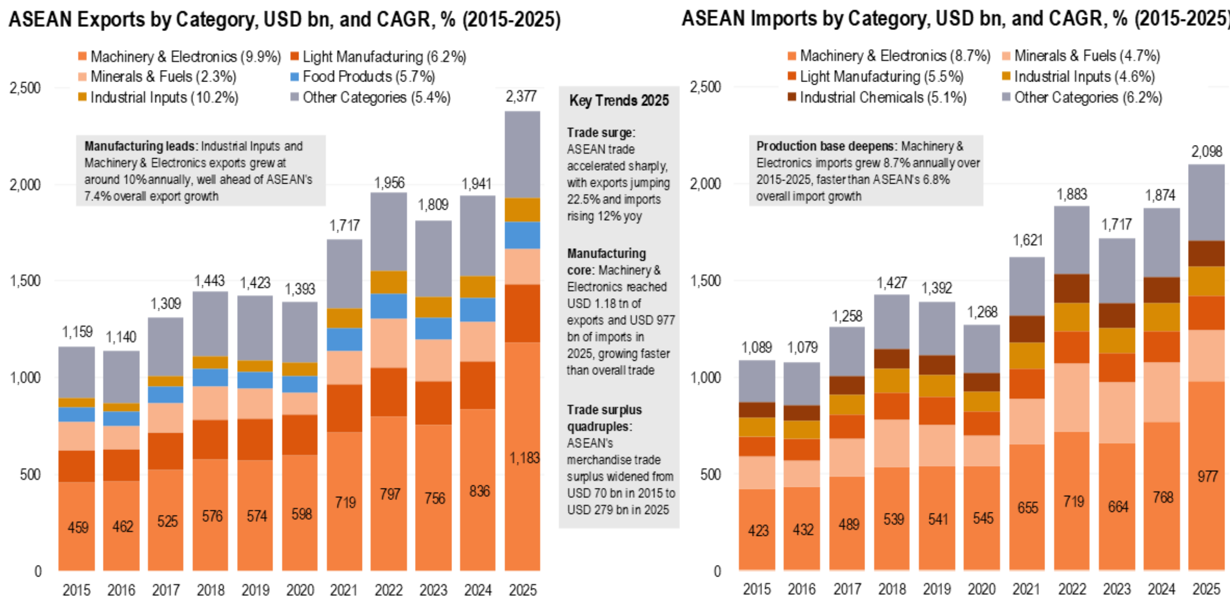
ASEAN Is Scaling Up as a Manufacturing and Trade Hub

Merchandise exports reached USD 2.38 trillion in 2025, outpacing USD 2.10 trillion in imports as Machinery & Electronics and Industrial Inputs drive trade growth.



Note: ASEAN – Association of South-East Asian Nations. Source: Trade Map, ANDAMAN PARTNERS Analysis

ASEAN's trade expansion is becoming increasingly manufacturing-led. Merchandise exports reached USD 2.38 trillion in 2025, jumping 22.5% yoy, while imports rose 12% to USD 2.10 trillion. This resulted in a USD 279 billion trade surplus, four times the 2015 level.

The longer-term shift is equally important. Machinery & Electronics and Industrial Inputs exports have grown at around 10% annually since 2015, well ahead of overall export growth. Machinery & Electronics alone reached USD 1.18 trillion of total exports in 2025, while strong growth in related imports points to the continued expansion of ASEAN's regional production base.

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