

Background slides

**“European Competitiveness and Energy
Policy Choices – Implications for EU ASEAN
trade relations”**

Iana Dreyer

Trade Analyst

Economy Analyst at Institut Montaigne

Paris, CERI, 01 December 2011

EU - ASEAN

- EU ASEAN merchandise trade in 2010 – € 145 bn, dominated by manufacturing
- EU accumulated FDI stocks in ASEAN in 2009: € 163 bn
- EU services export surplus with ASEAN in 2009: € 2.2 bn
- Top EU trading partners, by rank: Singapore, Malaysia, Thailand, Indonesia, Vietnam, Philippines

Potential GDP % change from previous year Source: OECD Stat (forecasts)	Average 1999-08	2009	2010	2011	2012
France	2.0	1.1	1.2	1.4	1.6
Germany	1.3	1.1	1.1	1.5	1.6
Italy	1.0	0.0	-0.1	0.2	0.3
Poland	4.2	3.8	3.1	2.9	3.0
Spain	3.6	1.6	0.7	0.8	1.1
Sweden	2.8	2.3	2.0	2.1	2.3
United Kingdom	2.4	0.8	0.2	0.9	1.4
Euro area	1.9	1.1	0.9	1.1	1.3
United States	2.6	1.7	1.6	1.9	2.3
Total OECD	2.3	1.4	1.3	1.6	1.8
(http://www.oecd.org/eco/sources-and-methods).					
1. Total economy less housing.					
Source: OECD Economic Outlook 89 database.					

Multi-factor Productivity Growth in EU 27 and selected OECD Economies

Source: OECD

	1995-2009	2001-2009
Country		
France	0.7	0.3
Germany	0.7	0.4
Italy	-0.4	-0.9
Spain	0	0.2
Sweden	1.1	0.9
United Kingdom	1.4	1.4
United States	1.3	1.2

Parts and Components Trade as Share of Total Trade - By key Manufacturing Sector - in %

Product category	1992/93	2005/2006	Contribution of parts and comp. To manuf. Trade growth – in %
Machinery and transport equipment (of which:) (SITC 7)	36.5	40.7	42.7
Power generating machines (SITC 71)	66.7	67.3	67.5
Specialised industrial machine (SITC 72)	25	27.3	29
Metal working machine (SITC 73)	26.3	27.4	28.1
General industrial machinery (SITC 74)	17.1	18.1	18.6
ICT products (SITC 75, 76, 772, 776)	50.5	55.5	57.1
Road vehicles (SITC 78)	26.1	27.7	28.6
Other transport equipment (SITC 79)	30.1	29.3	28.6
Miscellaneous manufacturing (SITC 8)	4.6	5.9	6.7
TOTAL MANUFACTURING TRADE	18.9	22.3	24

Source: Athukorala (2010)

Share of Parts and Components in Manufacturing Trade (SITC categories 5-8)

	1992/93 in %	2005/2006 in %
ASEAN 10	28	40.9
China	9.1	24.7
Japan	22	27.8
India	8.8	10.5
EU 15	16.9	17.9
NAFTA	28.9	27.2
Developed Countries	19.2	19.7
Developing Economies	18.3	26.1
Source: Athukorala (2010)		

EU 27 GDP as share of US GDP & in comparison to other major economies - 2010 and 2030

Source: Dadush and Stancil (2010); own calculations

