

東南アジア経済の 最近の動向について

ESRI Forum webinar

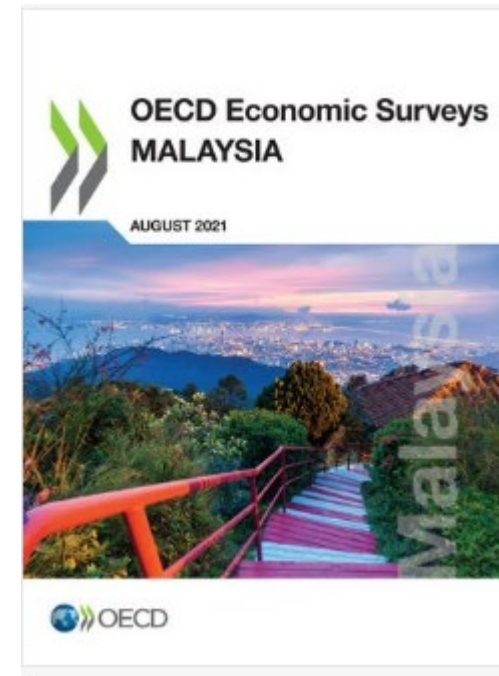
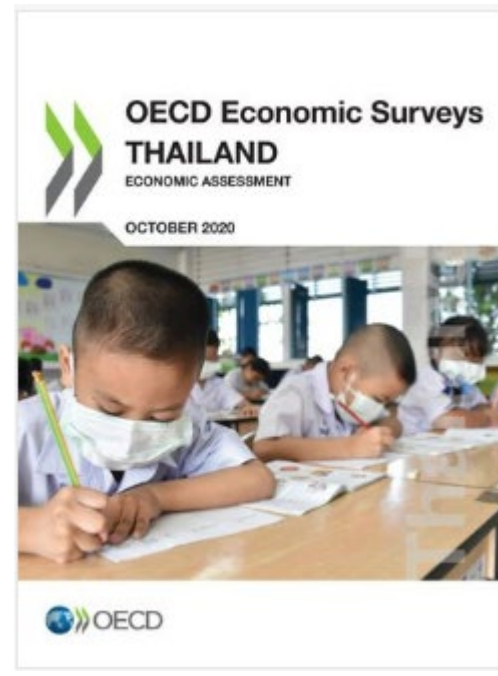
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OECD経済総局東南アジアデスクについて

- Set up in 2015 to produce *Economic Surveys* of Southeast Asian countries and now covers three countries, Malaysia (2016, 2019 and 2021), Thailand (2020) and Viet Nam (2023)



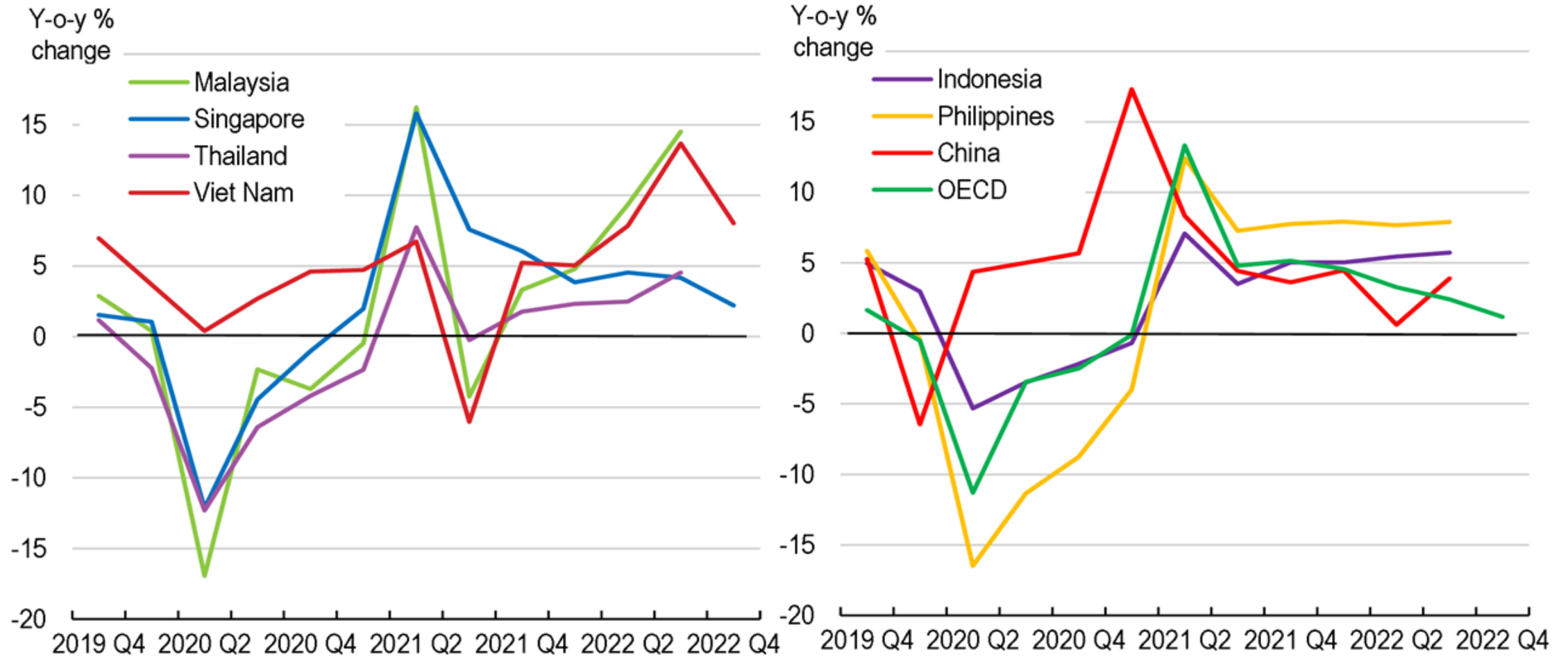
- Forthcoming: the first *OECD Economic Survey of Viet Nam*
- Has just started to work on the second *Economic Survey of Thailand*

• Source: OECD



東南アジア諸国では景気の回復が続いている

• Real GDP growth

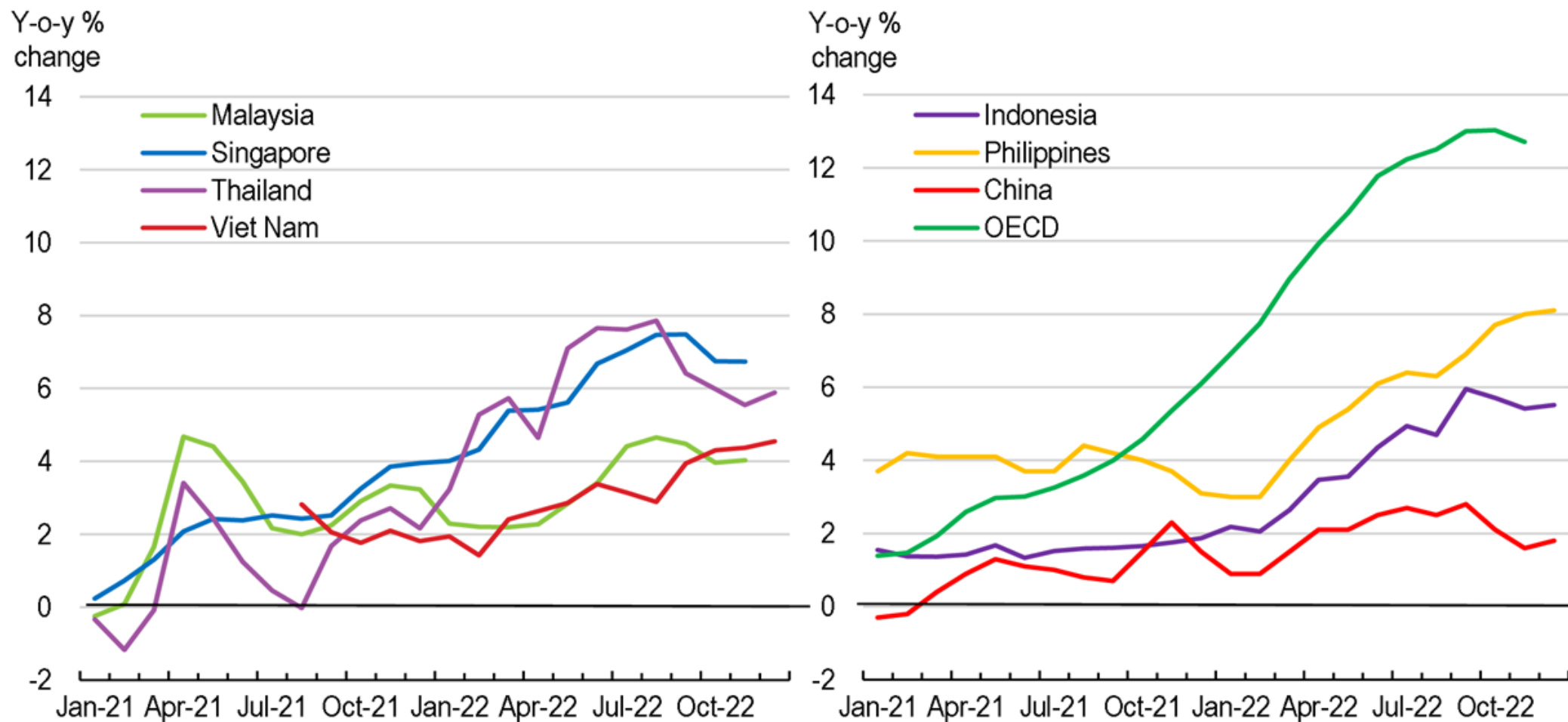


• Source: National databases and OECD calculations.



インフレ率は東南アジア諸国においても上昇

• CPI inflation



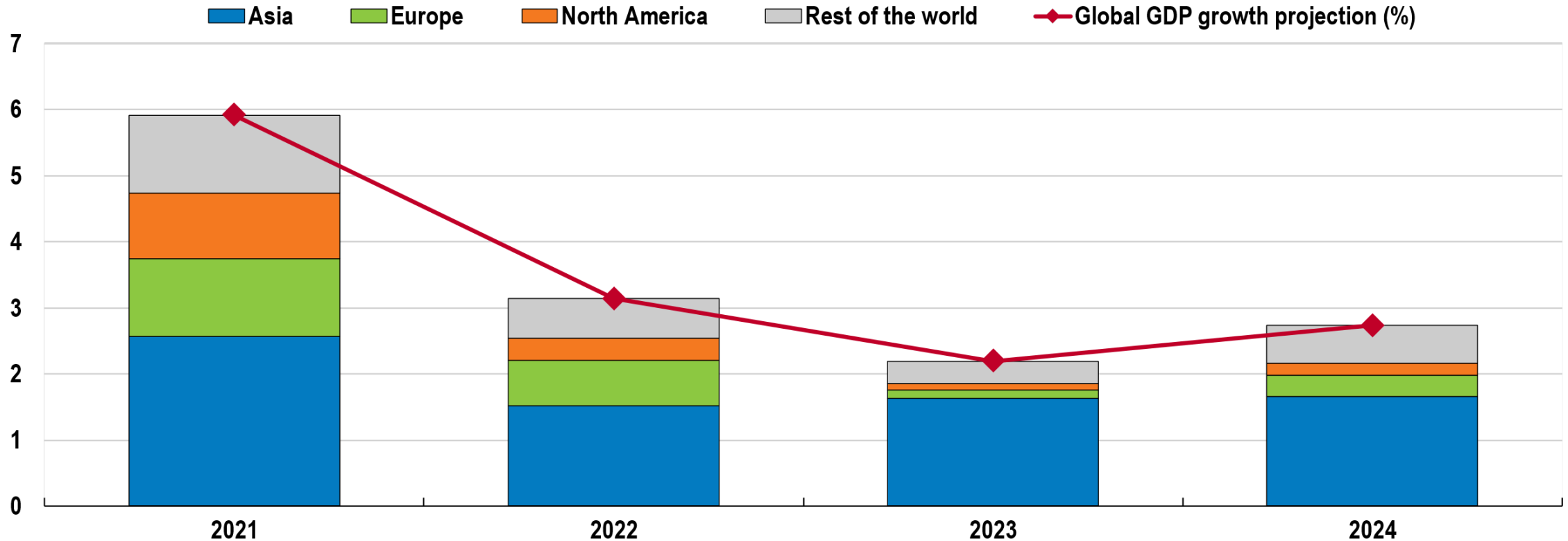
• Source: National databases and OECD calculations.



世界経済の成長は緩やかに（2022年11月公表見通しによる）

• Contributions to global growth

ppts



- Note: Asia comprises China, India, Indonesia, the Dynamic Asian Economies and OECD Asia-Pacific countries. Europe refers to OECD Europe countries. Rest of the world includes among others Latin America which comprises Argentina, Brazil, Chile, Colombia, Costa Rica, Mexico and Peru. Contributions calculated moving PPP shares of global GDP.

- Source: OECD Economic Outlook 112 database; and OECD calculations.



参考：GDP成長率の見通し (2022年11月公表見通しによる)

• G20 economies, %

▲ upward revision, by 0.3pp or more

■ no change or smaller than 0.3pp

▼ downward revision, by 0.3pp or more

	2022	2023	2024		2022	2023	2024
World	■ 3.1	▼ 2.2	2.7	G20	■ 3.0	▼ 2.2	2.7
Australia	■ 4.0	▼ 1.9	1.6	Argentina	▲ 4.4	▼ 0.5	1.8
Canada	▼ 3.2	▼ 1.0	1.3	Brazil	▲ 2.8	■ 1.2	1.4
Euro area	▲ 3.3	▼ 0.5	1.4	China	▼ 3.3	▼ 4.6	4.1
Germany	■ 1.8	▼ -0.3	1.5	India	▼ 6.6	▼ 5.7	6.9
France	■ 2.6	▼ 0.6	1.2	Indonesia	▲ 5.3	■ 4.7	5.1
Italy	▲ 3.7	▼ 0.2	1.0	Mexico	▲ 2.5	▼ 1.6	2.1
Spain	▲ 4.7	▼ 1.3	1.7	Russia	▲ -3.9	▼ -5.6	-0.2
Japan	■ 1.6	■ 1.8	0.9	Saudi Arabia	▲ 9.8	▼ 5.0	3.5
Korea	■ 2.7	▼ 1.8	1.9	South Africa	■ 1.7	■ 1.1	1.6
United Kingdom	▲ 4.4	▼ -0.4	0.2	Türkiye	▲ 5.3	■ 3.0	3.4
United States	▼ 1.8	▼ 0.5	1.0				

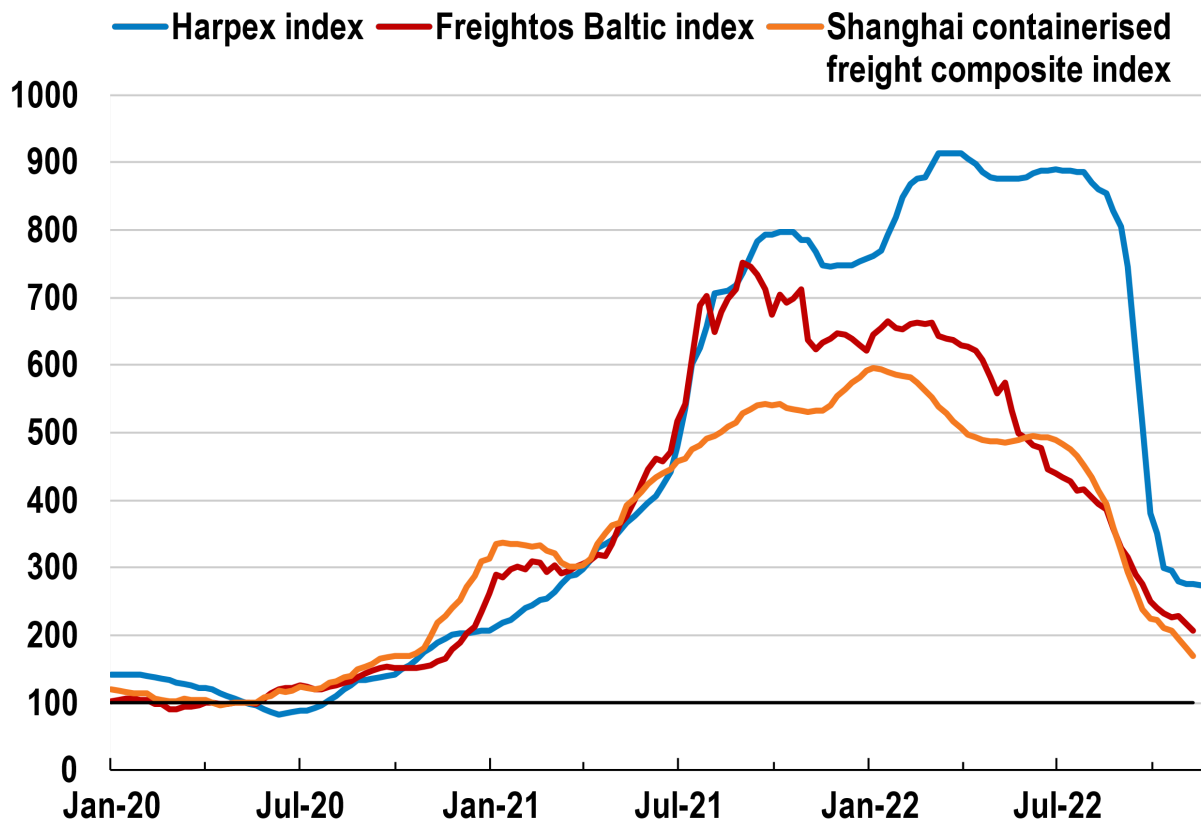
- Note: Revisions relative to the June 2022 Economic Outlook. India projections are based on fiscal years, starting in April. The European Union is a full member of the G20, but the G20 aggregate only includes countries that are also members in their own right. Spain is a permanent invitee to the G20. World and G20 aggregates use moving nominal GDP weights at purchasing power parities.
- Source: OECD Economic Outlook 112 database; and OECD calculations.



開かれた市場が経済の回復に貢献

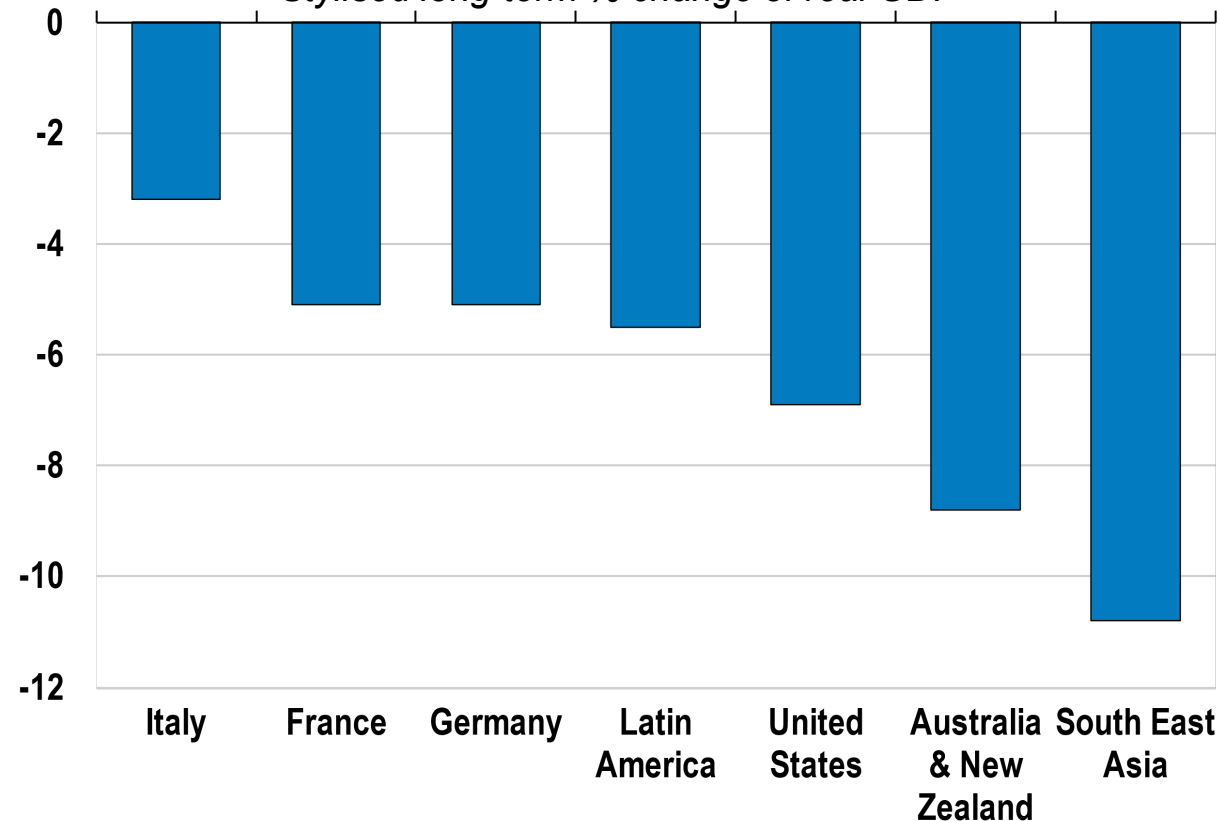
- Shipping costs have been decreasing

Indexed, 100 = May 2020



- Output loss with increased trade restrictions

Stylised long-term % change of real GDP



- Source: Refinitiv; and OECD calculations.

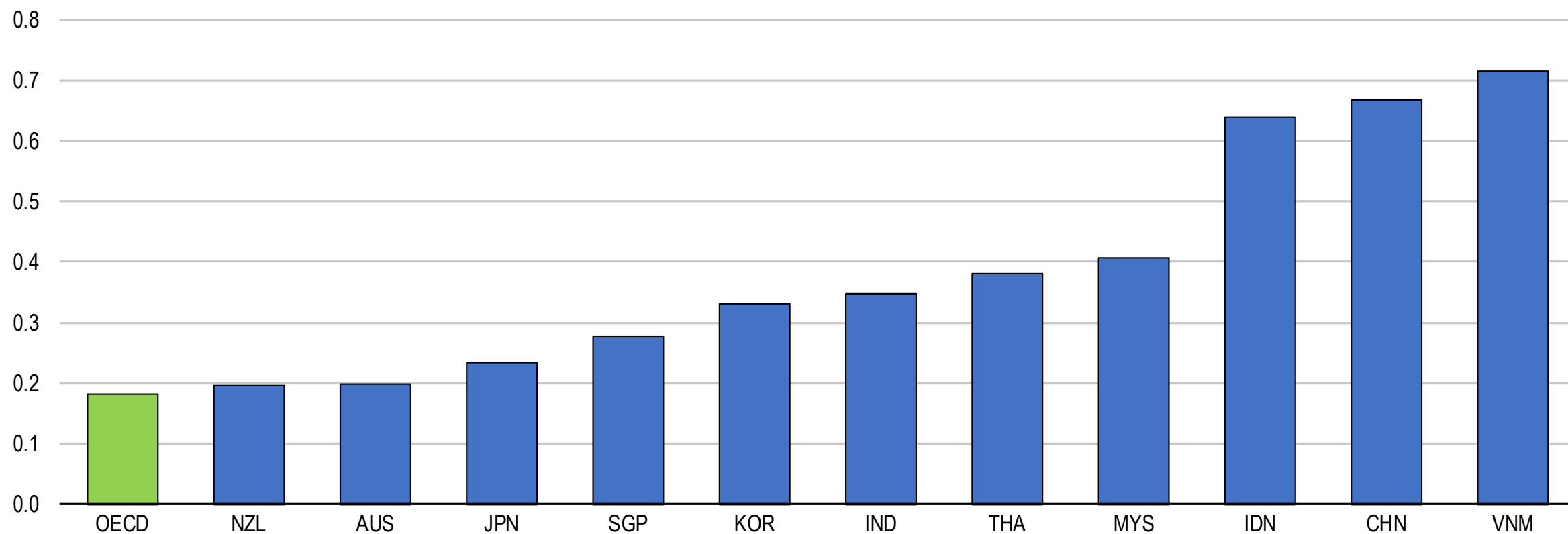
- Note: Chart shows the decrease of real GDP when shifting from an interconnected regime (definition: standard GVC production fragmentation) to a localised regime (assumptions: global rise in import tariffs on all traded products to 25%, national value-added subsidies of 1% of GDP directed to labour and capital in domestic non-services sectors and more constrained switching between different sources of inputs). South East Asia includes Brunei Darussalam, Cambodia, Malaysia, Philippines, Singapore, Thailand and Viet Nam. Latin America includes Chile, Colombia, Peru and Costa Rica. Source: Global value chains: Efficiency and risks in the context of COVID-19, 2021, OECD.



サービス市場のさらなる改革が重要

- Restrictiveness of services trade regulations

Services Trade Restrictiveness Index ranging from 0 (open) to 1 (closed), 2021



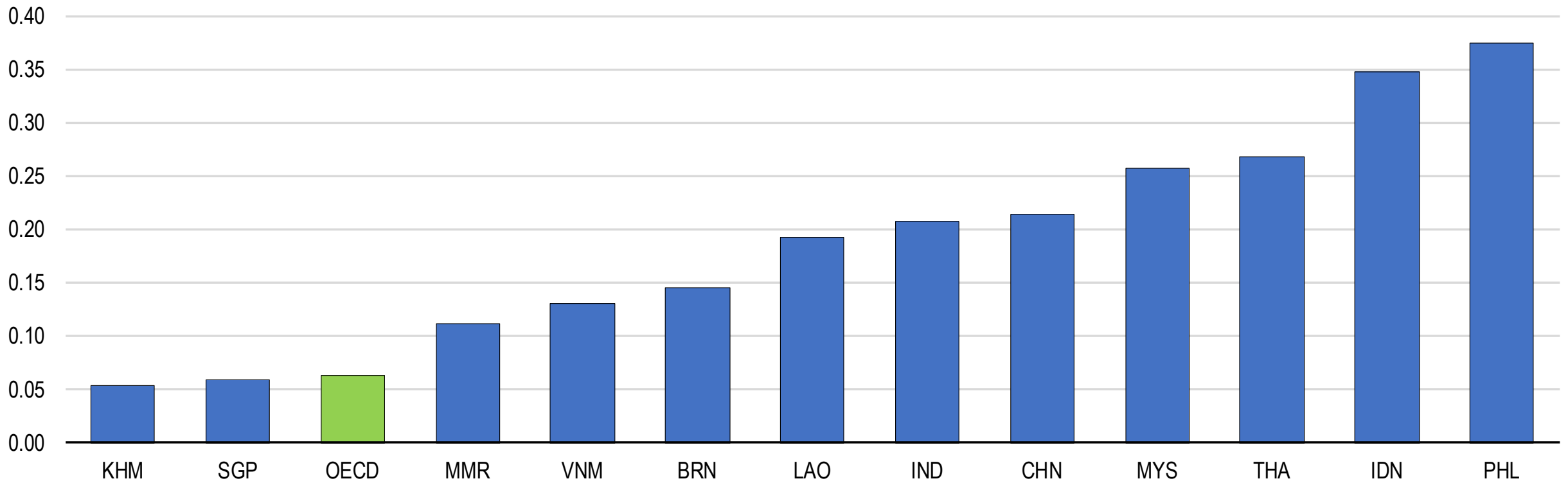
• Source: OECD, Services Trade Restrictiveness Index database.



対内直接投資の障壁をさらに引き下げていくことが重要

- Restrictiveness of FDI regulations

OECD FDI regulatory restrictiveness index, scaled from 0 (open) to 1 (closed), 2020



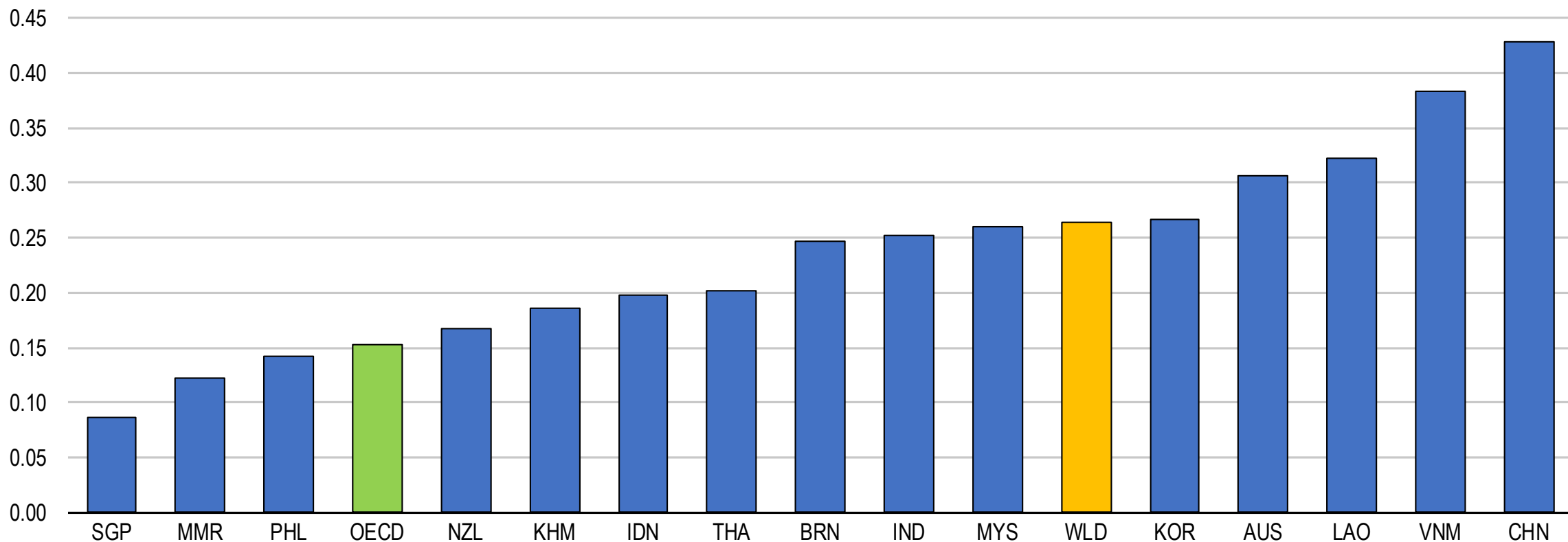
- Note: The OECD FDI Regulatory Restrictiveness Index covers only statutory measures discriminating against foreign investors (e.g. foreign equity limits, screening & approval procedures, restriction on key foreign personnel, and other operational measures). Other important aspects of an investment climate (e.g. the implementation of regulations and state monopolies, preferential treatment for export-oriented investors and special economic zones regimes among other) are not considered. See Kalinova et al. (2010) for further information on the methodology.
- Source: OECD FDI Regulatory Restrictiveness Index database.



脱炭素向け経済構造の変革を加速していくことが必要

- CO2 emission intensity

CO₂ emissions per unit of GDP in USD PPP, 2020 or latest year available



• Source: OECD, Green Growth Indicators database.



ご清聴ありがとうございました

- Resources

For more information, please visit OECD webpages on

Malaysia:

<https://www.oecd.org/economy/malaysia-economic-snapshot/>

Thailand:

<https://www.oecd.org/economy/thailand-economic-snapshot/>

Viet Nam: forthcoming

