



ASEAN Snapshot 2022

Focus on German-ASEAN business relation










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Contents

| | | | | | |
|-----------|--|-----------|---|-----------|--|
| 3 | Foreword | 14 | ASEAN countries overview | 30 | About German Chambers ASEAN Business Council (GCABC) |
| 4 | About ASEAN | 16 |  Indonesia | 32 | Contact – AHKs in ASEAN |
| 6 | ASEAN highlights 2021 | 18 |  Malaysia | 34 | Imprint |
| 8 | ASEAN economic snapshot | 20 |  Myanmar | | |
| 10 | ASEAN – Key features for German businesses | 22 |  Philippines | | |
| 12 | German-ASEAN business relations in number | 24 |  Singapore | | |
| | | 26 |  Thailand | | |
| | | 28 |  Vietnam | | |

ASEAN Snapshot 2022 Foreword

Ladies and Gentlemen,

Welcome to ASEAN Snapshot in 2022.

ASEAN has maintained its status as one of the most dynamic economic regions of the world, reaching a GDP growth rate of 5.5% in 2021, indicating a rather successful way in dealing with the worldwide Corona pandemic. Rationale policies combined with sensible citizens' behavior maintained political stability and created a conducive economic environment destined to support a moderate impact of the pandemic and further growth of the region in the future.

The ASEAN single market with its 650 to 700 million mostly still young and technology affine people, and a fast-growing middle class, is making THE REGION an exciting consumer market with high growth potential. German exports to ASEAN in 2021 grew to 25.5 billion EUR (+14.4% YoY) and imports to 42.5 billion EUR (+10.0% YoY).

Meanwhile ASEAN is home to more than 3,000 German companies and their investments in the region have been growing steadily and are likely to increase even more in the future, considering long-term as well as recent geopolitical developments, like rising trade tensions and the reorganization of supply chains. Increasing regional and global integration, improving regulatory environments, competitive cost structures and diversification opportunities are positioning ASEAN very well as alternative or complementary investment destination for German companies.

The German Chambers ASEAN Business Council (GCABC), as a #PartnerInASEAN, is pleased to introduce to you our fifth edition of the ASEAN Snapshot booklet with a variety of up-to-date charts and infographics about ASEAN economic developments, ranging from demographic, economics, trade and investment information.

We look forward supporting you in doing business in ASEAN.



Jan Roennfeld

German-Indonesian Chamber of Industry and Commerce
GCABC Spokesperson 2022

About ASEAN



An Economic Superpower

ASEAN – The Association of Southeast Asian Nations – consists of 10 member states: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Vietnam.

This trade-driven bloc is of vital geostrategic importance to the world, one of the most diverse and complex region in the world. With the population of 650 million and fast-growing wealth it is becoming a global bright spot.

The establishment of the ASEAN Economic Community (AEC) in 2015 is a major milestone of ASEAN which envisions this region as a single market and production base, a highly competitive region, with equitable economic development, and fully integrated into the global economy.



1967

Inception by ASEAN 5: Indonesia, Malaysia, the Philippines, Singapore, and Thailand.

1984

Brunei joins ASEAN

1995

Vietnam becomes a member

1997

Laos and Myanmar become members

1999

Cambodia is a member, forming the ASEAN 10

2000

Signing and implementing the free trade agreements with China (ACFTA); India (AIFTA); Japan (AJCEP); Australia-New Zealand (AANZFTA) and South Korea (AKFTA).

2015

The establishment of the ASEAN Economic Community (AEC)

2020

The Regional Comprehensive Economic Partnership (RCEP) was signed by 10 ASEAN member states, Japan, South Korea, Australia, New Zealand and China. It accounts for almost a third of the world's population and GDP.

2021

The kick-off of the EU-ASEAN Smart Green ASEAN Cities programme elevates the EU-ASEAN relationship even further, entrenching and deepening partnership to concrete matters at city level but bound within the spirit of regionalism as an umbrella. The SGAC programme is strategic as it aims to support sustainable urbanisation in the ASEAN region, reduce the environmental impacts of urban areas, and improve the quality of life of citizens.

01

Consolidated strategy on the Industry 4.0

The Industry 4.0 offers people the opportunity to grow better connected, helps economies grow and become more competitive, empowers ASEAN's citizens and improves their livelihoods through digitalizing the provision of basic social services, and helps society decarbonize to meet sustainable development challenges confronting the region.



02

ASEAN & Germany: Commitment to strengthen partnership

At the 5th ASEAN-Germany Development Committee in Nov 2021, both sides discussed the importance of deepening cooperation through regional programs and initiatives in:

- **Good governance and human rights**
- **Trade and investment cooperation**
- **Energy security**
- **Innovation and technology**
- **Environment and climate change**
- **Technical vocational education and training**



03

German FDIs Update

Germany has been an active investor in ASEAN with a steady growth of investment and ASEAN is home to more than 3,000 German companies:

- **Medical field:** BioNTech will set up its regional headquarters and build an mRNA vaccine plant in Singapore.
- **Digitalization hub:** Siemens built its digitalization hub in Singapore focusing on construction, energy, healthcare and manufacturing.
- **China +1:** Following this strategy, Tesa and Kurz built their productions for tape adhesive and hi-tech coating and thin film in Vietnam.



04

ASEAN Comprehensive Recovery Framework (ACRF)

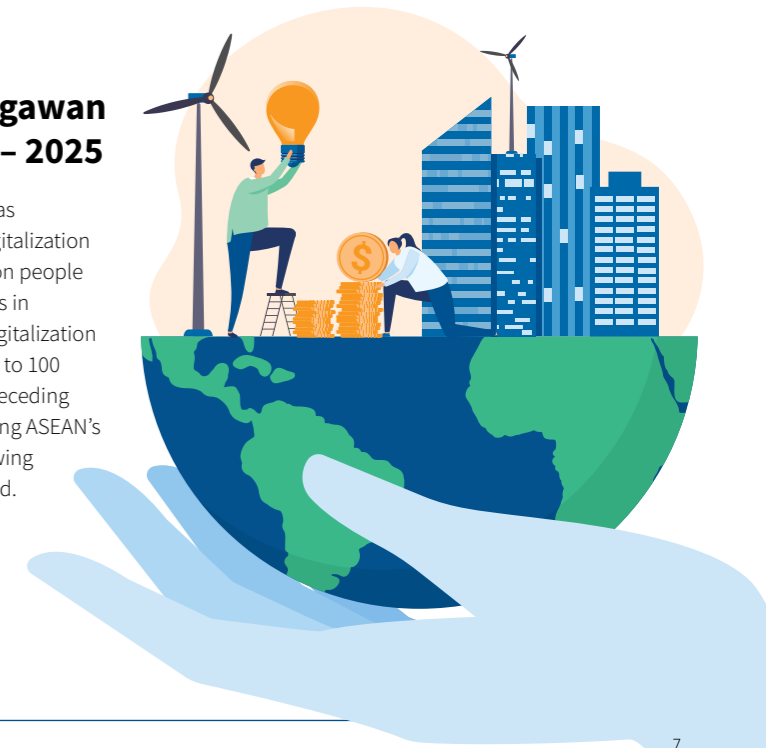
In Nov 2020, the framework is built upon five broad strategies on health system, human security, economic integration, inclusive digital transformation, and sustainability.



05

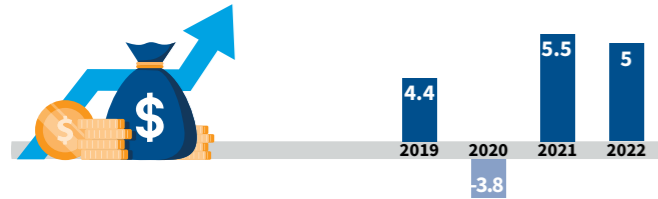
Bandar Seri Begawan roadmap 2021 – 2025

The COVID-19 pandemic has accelerated the pace of digitalization in ASEAN. In 2020, 40 million people in the six largest economies in Southeast Asia adopted digitalization for the first time compared to 100 million new users in the preceding five years - further cementing ASEAN's position as the fastest growing Internet market in the world.

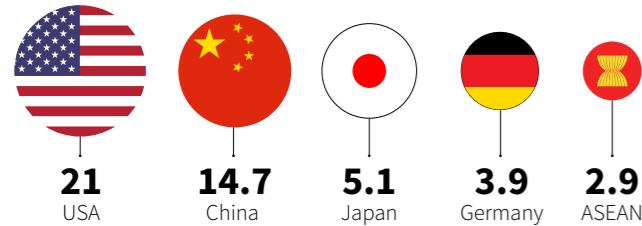


ASEAN Economic Snapshot

GDP growth in %



ASEAN is in the TOP 5 economies by GDP in 2020 (in trillion US\$)



Challenges

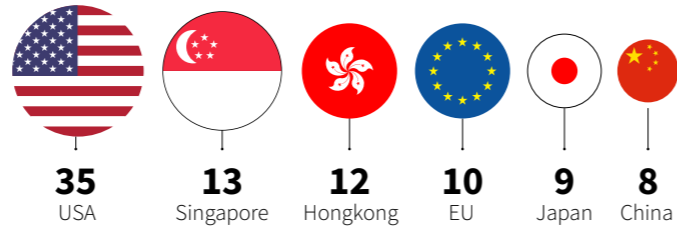


- Economic policy framework conditions
- Price of raw materials
- Shortage of personnel
- Demand
- Trade barriers / preference for domestic companies

Net inflow FDI 2020



EU is among the TOP 4 ASEAN's biggest investors in 2020 (in billion US\$)



Investment opportunities in

Advanced manufacturing, digital technology, real estate activities, education and training, financial and insurance service, fast-moving consumer goods and life sciences!



Source: World Bank, ADB, GTAI, ASEAN Statistics, AHK WBO Fall 2021

Export volume 2020



Key export products

Electrical machinery; Machinery & mechanical appliance; Mineral fuels & Oils; Precious stones, metals & pearls; and Optical, photographic, cinematographic, measuring, checking, medical or surgical instruments and apparatus.



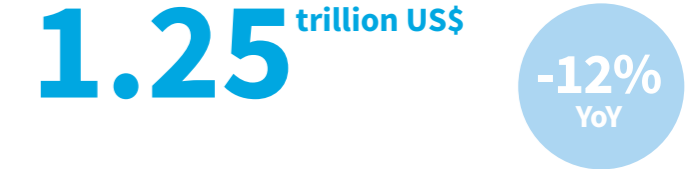
Impact of COVID-19



Slowing growth, sluggish recovery of trade and increase in unemployment rate are three significant risk factors that the ASEAN economy is faced with. However, ASEAN managed to keep the virus's spread below levels experienced in other regions, accounting for less than 5 per cent of global cases and deaths in 2021.

Source: GTAI, ASEAN Statistics, ASEAN.org

Import volume 2020



Key import products

Electrical machinery; Mineral fuels & oils; Machinery & mechanical appliance; Plastics & Steel and Irons.



Recovery in 2022: One of ASEAN's main COVID-19 initiatives is the ASEAN Comprehensive Recovery Framework (ACRF), which serves as the region's consolidated exit strategy from the COVID-19 crisis.

ASEAN – Key features for German businesses

01

An increase in trade barriers and ongoing effects of the coronavirus pandemic disrupting production processes and supply chains are making it more difficult for internationally active German companies to do business globally in 2022. Only a few regions in the world - for example in ASEAN - do companies expect their business to expand.

People

ASEAN is a single market with a growing consumer of 650 million people. German companies see lots of potential for growth in ASEAN in terms of increasing middle-class spending, competitive labor cost and especially young and motivated workforces who strive for productivity and efficiency.



02

Global integration

The establishment of ASEAN Economic Community AEC, the CPTTP (TPP11), other bilateral FTAs (EU-Singapore and EU-Vietnam) as well as the newly signed RCEP are expected to enhance trade and investment flows into ASEAN.



03

China +1

Based on **favorable demographics, high rates of urbanization, industrial diversification and growing middle-class consumers**, ASEAN remains attractive for investors. ASEAN Governments are supportive of long term FDI to help ensure continued strong, equitable, and sustainable growth.



04

Digital acceleration and resilient recovery

Covid-19 has quickened the pace of regional cooperation in ASEAN, while healthcare systems are enhanced, and digitalization is accelerated to achieve their promise of more sustainable, inclusive trade and investment. ASEAN has made great progress in optimizing the role of trade in the post-pandemic economic recovery, with the private and public sector alike keen to strengthen supply chains and restore trade connectivity policies.



05

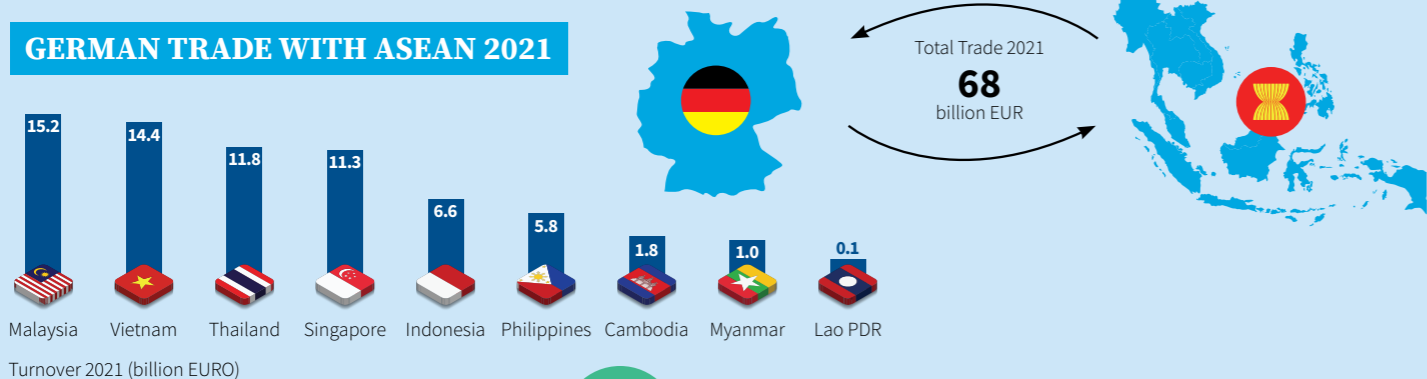
Taxonomy for sustainability

Classification systems like the ASEAN Taxonomy as foundational tools to fulfill long-term sustainability agendas. It is intended to bring these benefits to Southeast Asia in a framework that is generally aligned with the world's most developed and influential sustainability taxonomy, the **European Union's Taxonomy Regulation**.



German-ASEAN business relations in number

GERMAN TRADE WITH ASEAN 2021



German exports to ASEAN

25.5 Billion EUR **+14.3% YoY**

German imports from ASEAN

42.5 Billion EUR **+10% YoY**

Major Export Products

- Machinery and mechanical appliances
- Electrical machinery and equipment
- Vehicles
- Optical, photographic, cinematographic, measuring, checking, medical or surgical instruments
- Pharmaceutical products

Major Import Products

- Electrical machinery and equipment and parts
- Nuclear reactors, boilers, machinery and mechanical appliances
- Optical, photographic, cinematographic, measuring, checking, medical or surgical instruments
- Footwear
- Apparel and clothing accessories

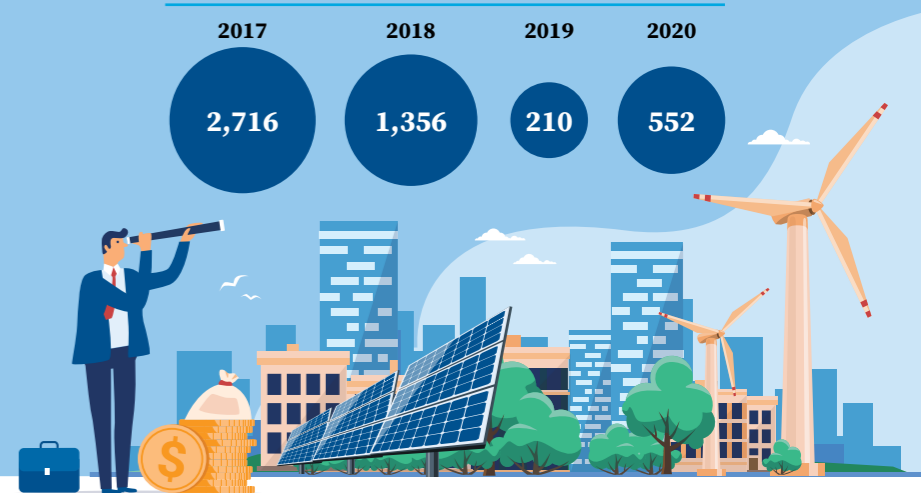
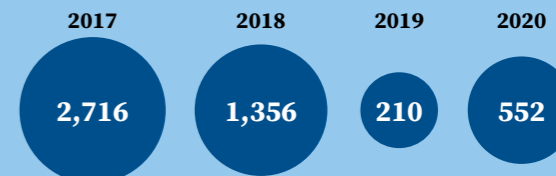
Source: Destatis, ASEAN Statistics

GERMAN INVESTMENT IN ASEAN

Major sectors of German FDI

- Financial and Insurance activities
- Professional, scientific and technical activities
- Transportation and storage
- Information and communication
- Real estate activities

Flow of Inward German FDI to ASEAN (billion US\$)



OPPORTUNITIES

Investment opportunities in

Digital technology, healthcare, green energy, advanced manufacturing and education & training!



Source: Destatis, ASEAN Statistics, AHK World Business Outlook 2021

CHALLENGES

Unstable economic policy frameworks, legal uncertainty, supply chain problems and pandemic-related issues are main challenges for German business in ASEAN.

ASEAN countries overview



INDONESIA



Export volume to Germany 2021F (billion EUR) Import volume from Germany 2021F (billion EUR)

4.1 **2.5**

Population (m) **272**

Surface (km2) **1,920,000**

Real GDP (YoY%) **3**

Nominal GDP 2021 (Billion US\$) **1,175**



MALAYSIA



Export volume to Germany 2021F (billion EUR) Import volume from Germany 2021F (billion EUR)

10 **5.2**

Population (m) **33.4**

Surface (km2) **330,000**

Real GDP (YoY%) **2.5**

Nominal GDP 2021 (Billion US\$) **361**



MYANMAR



Export volume to Germany 2021F (billion EUR) Import volume from Germany 2021F (billion EUR)

0.9 **0.1**

Population (m) **54.4**

Surface (km2) **676,590**

Real GDP (YoY%) **-8.9**

Nominal GDP 2021 (Billion US\$) **76.2**



PHILIPPINES



Export volume to Germany 2021F (billion EUR) Import volume from Germany 2021F (billion EUR)

4 **1.8**

Population (m) **111**

Surface (km2) **300,000**

Real GDP (YoY%) **5**

Nominal GDP 2021 (Billion US\$) **391**



SINGAPORE



Export volume to Germany 2021F (billion EUR) Import volume from Germany 2021F (billion EUR)

4.2 **7.1**

Population (m) **5.9**

Surface (km2) **726**

Real GDP (YoY%) **6.7**

Nominal GDP 2021 (Billion US\$) **381**



THAILAND



Export volume to Germany 2021F (billion EUR) Import volume from Germany 2021F (billion EUR)

6.9 **4.9**

Population (m) **70**

Surface (km2) **513,120**

Real GDP (YoY%) **1.2**

Nominal GDP 2021 (Billion US\$) **506**



VIETNAM



Export volume to Germany 2021F (billion EUR) Import volume from Germany 2021F (billion EUR)

10.7 **3.7**

Population (m) **98.2**

Surface (km2) **331,310**

Real GDP (YoY%) **2.7**

Nominal GDP 2021 (Billion US\$) **288**

INDONESIA



The world's fourth biggest country in terms of population, and ASEAN largest economy with more than 40% share of the combined GDP. Indonesia, the only G-20 member state and trillion+ USD economy of ASEAN is after two decades of stable economic growth destined to be among the top 10 major economies in the world.



Nominal GDP (billion US\$)



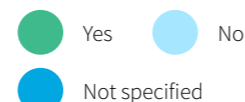
GDP per capita (US\$)



CPI (YoY %) ann avg

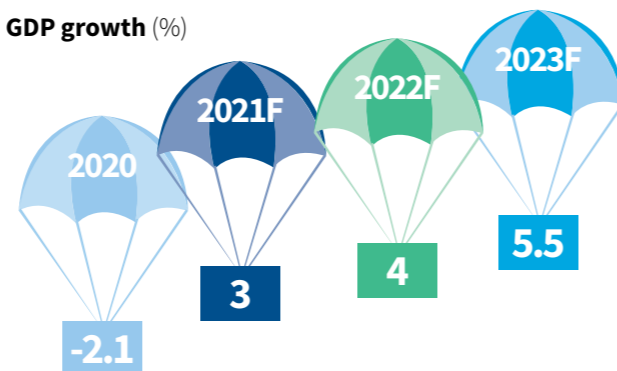


German companies are working on the implementation of their sustainability goals?



(Based on the survey result of AHK World Business Outlook Fall 2021)

GDP growth (%)



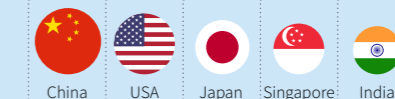
Source: GTAI, Deutsche Bank, Destatis, AHK World Business Outlook Fall 2021

Export

Export volume 2021F

229 billion US\$

Major export partners 2020



Major export products 2020



Import

Import volume 2021F

185 billion US\$

Major import partners 2020



Major import products 2020

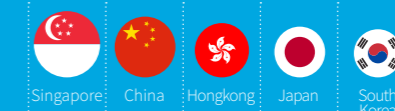


Investment

FDI net inflow 2021F

18.7 billion US\$

Major FDI contributors 2020



Major FDI sectors 2020



German-Indonesia Relations

German exports 2021 (Billion EUR)

2.5



4.1

German imports 2021 (Billion EUR)

Major German products

Export: Machinery; Chemical Ore; Measurement/Control technology; Electrical engineering; Foodstuffs; Electronics assembly; Natural resources

Import: Textile & Garment; Foodstuffs; Natural resources; Electronics assembly; Electrical engineering; Chemical products

MALAYSIA

Since gaining independence in 1957, Malaysia has successfully diversified its economy from one that was agriculture and commodity-based, to one that is a leading exporter of electrical appliances, electronic parts and components. Malaysia is one of the most open economies in the world, with a trade to GDP ratio averaging over 140 percent since 2010. Openness to trade and investment have been instrumental in employment creation and income growth, with about 40 percent of jobs in Malaysia linked to export activities.



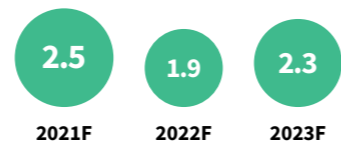
Nominal GDP (billion US\$)



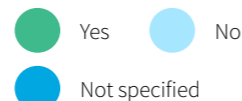
GDP per capita (US\$)



CPI (YoY %) ann avg



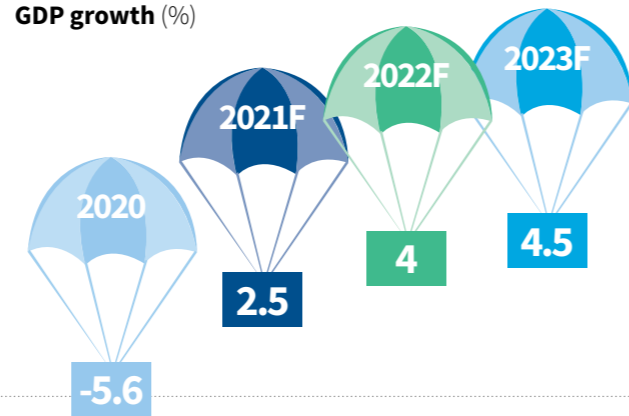
German companies are working on the implementation of their sustainability goals?



(Based on the survey result of AHK World Business Outlook Fall 2021)



GDP growth (%)

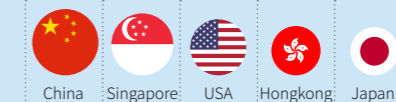


Export

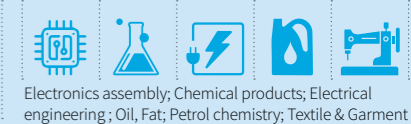
Export volume
2021F

233.7 billion US\$

Major export partners
2020



Major export products
2020



Import

Import volume
2021F

192.4 billion US\$

Major import partners
2020



Major import products
2020



Investment

FDI net inflow
2021F

5 billion US\$

Major FDI contributors
2020



Major FDI sectors
2020



German-Malaysia Relations

German exports 2021
(Billion EUR)



10

German imports 2021
(Billion EUR)

5.2

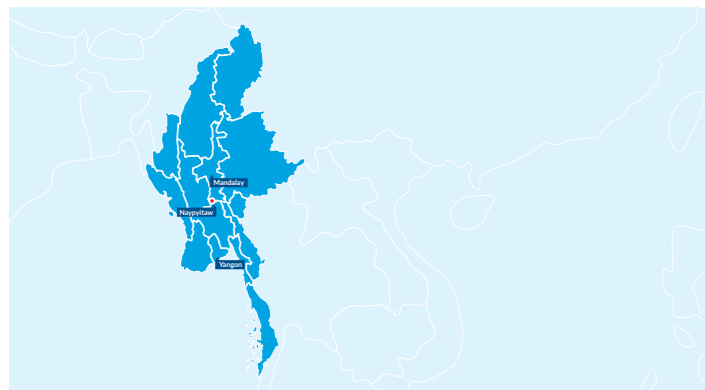
Major German products

Export: Electronics; Machinery; Chemical Ore; Measurement/Control technology; Electrical engineering

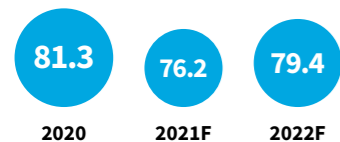
Import: Textile & Garment; Footwear; Natural resources; Electronics assembly; Foodstuffs; Oil, Fat, Wax

MYANMAR

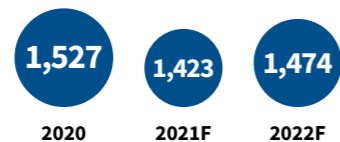
Myanmar has rich natural resources, a strategic location at the crossroads of Asia, a young population, and a large market. From a formerly heavily agricultural economy, the country has diversified greatly and offers a wealth of business opportunities. Due to the current challenges Myanmar is facing the economic has slowed down since 2021.



Nominal GDP (billion US\$)



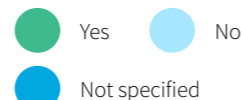
GDP per capita (US\$)



CPI (YoY %) ann avg

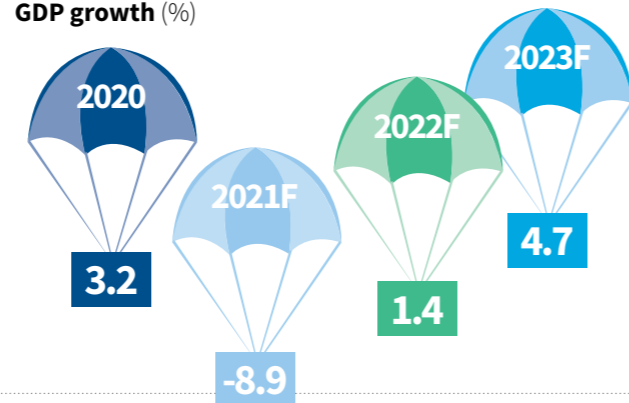


German companies are working on the implementation of their sustainability goals?



(Based on the survey result of AHK World Business Outlook Fall 2021)

GDP growth (%)

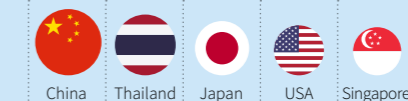


Export

Export volume 2021F

14.9 billion US\$

Major export partners 2020



Major export products 2020



Import

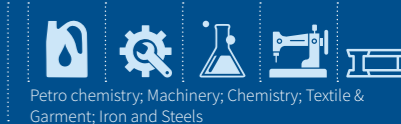
Import volume 2021F

14.6 billion US\$

Major import partners 2020



Major import products 2020



Investment

FDI net inflow 2021F

3.8 billion US\$

Major FDI contributors 2020



Major FDI sectors 2020



German-Myanmar Relations

German exports 2021 (Billion EUR)



0.9

German imports 2021 (Billion EUR)

0.1



Major German products

Export: Chemical Ore; Machinery; Measure/Control technology; Electrical engineering; Foodstuffs

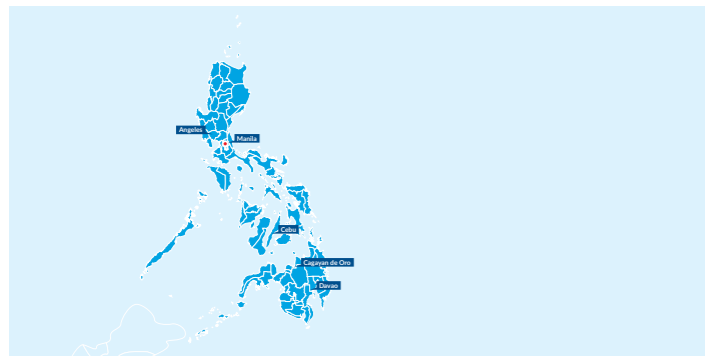
Import: Textile & Garment; Footwear; Handbags and travel items; Foodstuffs; Natural resources (excluding fuels)

PHILIPPINES



The current administration has prioritized the development of the country's infrastructure and intends to spend around \$158 billion over the next five years on its "Build, Build, Build" program.

The Filipino population is young with an average age of 23 years, speaks good English, and is consumer-oriented, interestingly, the Philippines has also the narrowest Global Gender Gap in ASEAN.



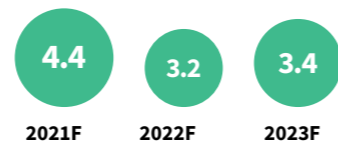
Nominal GDP (billion US\$)



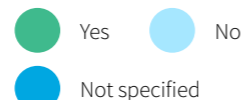
GDP per capita (US\$)



CPI (YoY %) ann avg

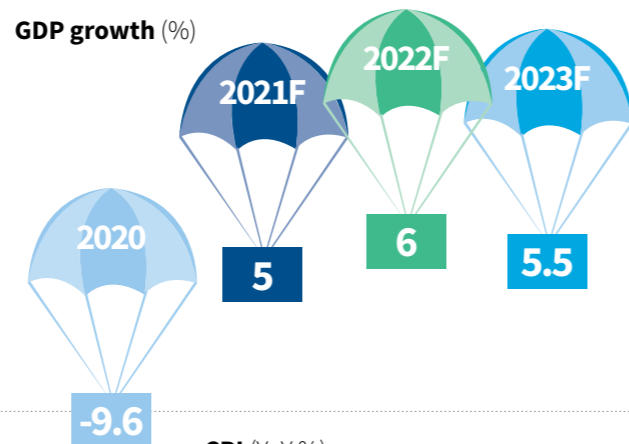


German companies are working on the implementation of their sustainability goals?



(Based on the survey result of AHK World Business Outlook Fall 2021)

GDP growth (%)



Export

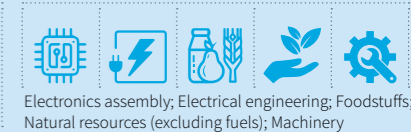
Export volume
2021F

56.3 billion US\$

Major export partners
2020



Major export products
2020

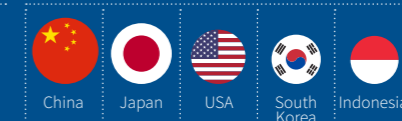


Import

Import volume
2021F

105.9 billion US\$

Major import partners
2020



Major import products
2020



Investment

FDI net inflow
2021F

5.9 billion US\$

Major FDI contributors
2020



Major FDI sectors
2020



German-Philippines Relations

German exports 2021
(Billion EUR)

1.8



4.0

German imports 2021
(Billion EUR)

Major German products

Export:

Chemical ore; Machinery; Electronics assembly; Vehicles; Measurement/Control Technology; Electrical engineering; Foodstuffs

Import:

Electronics assembly; Electrical engineering; Foodstuffs; Measurement/Control Technology; Textile & Garments; Chemical ore; Machinery; Natural resources (excluding fuels)

SINGAPORE



Singapore is one of the world's greenest cities and ranks #1 in Asia for sustainability. The Sustainable Cities Index by Arcadi ranks 100 global cities according to three facets of sustainability: social, environmental and economic. Moreover, Singapore is one of the top cities in the world in terms of ease of doing business. The World Bank's Doing Business survey looks at measures such as trading across borders, enforcing contracts, getting credit and paying taxes.



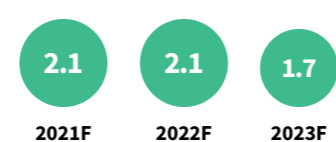
Nominal GDP (billion US\$)



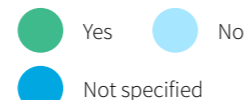
GDP per capita (US\$)



CPI (YoY %) ann avg

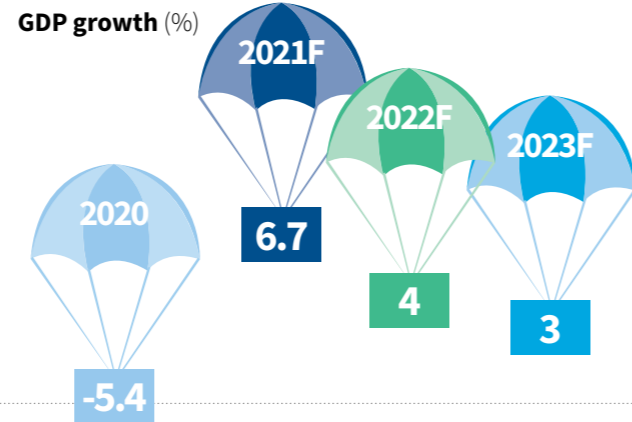


German companies are working on the implementation of their sustainability goals?



(Based on the survey result of AHK World Business Outlook Fall 2021)

GDP growth (%)



Export

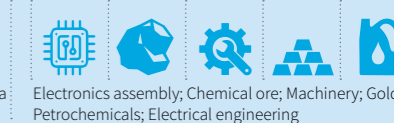
Export volume
2021F

466.4 billion US\$

Major export partners
2020



Major export products
2020

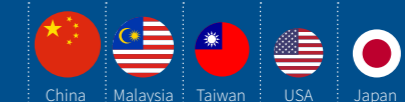


Import

Import volume
2021F

357.5 billion US\$

Major import partners
2020



Major import products
2020



Investment

FDI net inflow
2021F

65.4 billion US\$

Major FDI contributors
2020



Major FDI sectors
2020



German-Singapore Relations

German exports 2021
(Billion EUR)

7.1



4.2

German imports 2021
(Billion EUR)

Major German products

Export:

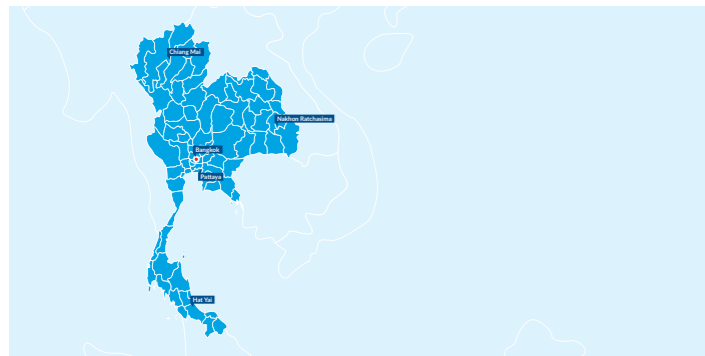
Machinery; Chemicals Ore; Electrical engineering; Electronics assembly; Motor vehicles & spare parts; Measurement/Control technology

Import:

Chemical ore; Measurement/Control technology; Electronics assembly; Electrical engineering; Machinery

THAILAND

Thailand is the second largest economy in ASEAN, after Indonesia. It is the automotive hub in ASEAN and was in 2018 the 11th biggest vehicle producer in the world, currently pushing to become the next-generation automotive industry base. The Eastern Economic Corridor (EEC) is being developed into a hub for manufacturing, transport and logistics and offers huge investment opportunities. The Board of Investment identified 12 targeted industries which benefit from special investment incentives.



Nominal GDP (billion US\$)



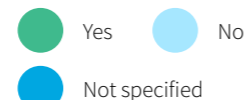
GDP per capita (US\$)



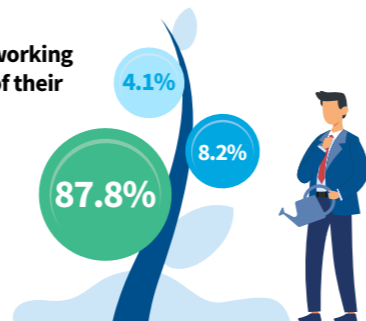
CPI (YoY %) ann avg



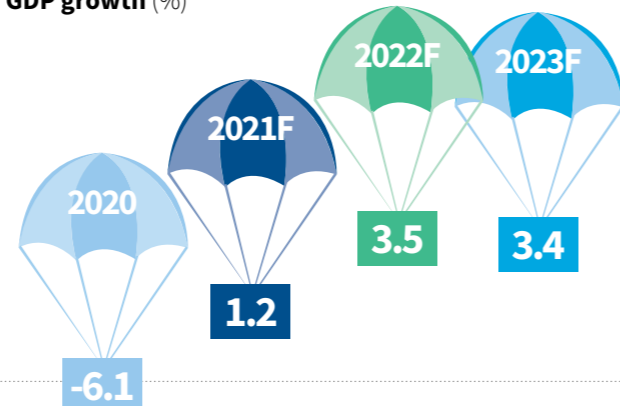
German companies are working on the implementation of their sustainability goals?



(Based on the survey result of AHK World Business Outlook Fall 2021)



GDP growth (%)



Export

Export volume
2021F

266.2 billion US\$

Major export partners
2020



Major export products
2020

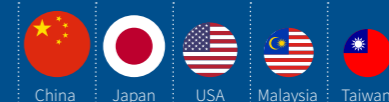


Import

Import volume
2021F

238.1 billion US\$

Major import partners
2020



Major import products
2020



Investment

FDI net inflow
2021F

-4 billion US\$

Major FDI contributors
2020



Major FDI sectors
2020



German-Thailand Relations

German exports 2021
(Billion EUR)



4.9

6.9

German imports 2021
(Billion EUR)

Major German products

Export:

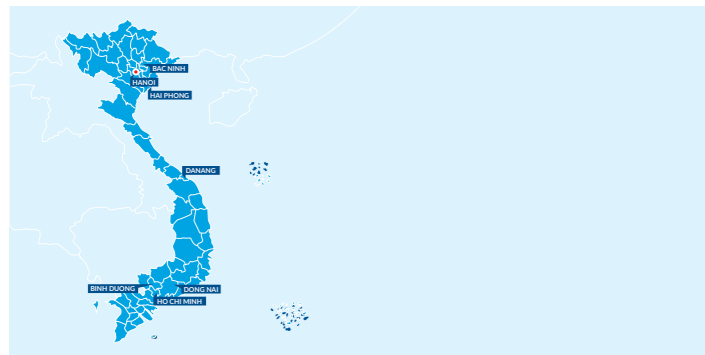
Machinery; Chemical ore; Motor vehicles & spare parts; Electrical engineering; Electronics assembly; Measurement/control technology; Foodstuffs

Import:

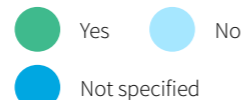
Electronics assembly; Machinery; Electrical engineering; Foodstuffs; Motor vehicles & spare parts; Textile & Garment; Optics; Chemical ore

VIETNAM

Vietnam's economy is one of the fastest-growing in Asia with the lowest barrier to entry the market, the young, motivated and reliable workforces. Germany and Vietnam have excellent economic relations and Germany enjoys an outstanding reputation in Vietnam, which is unique in this form in the ASEAN region. Moreover, Vietnam is the only country in ASEAN that is in all relevant free trade initiatives in the region, including CPTPP (TPP11) and the FTA between the EU and Vietnam.



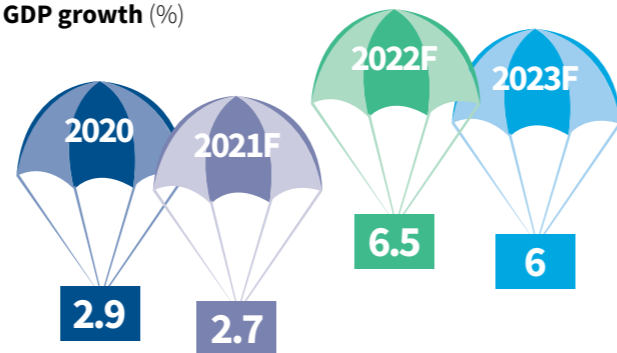
German companies are working on the implementation of their sustainability goals?



(Based on the survey result of AHK World Business Outlook Fall 2021)



GDP growth (%)



Nominal GDP (billion US\$)



GDP per capita (US\$)



CPI (YoY %) ann avg



Source: GTAI, Deutsche Bank, Destatis, AHK World Business Outlook Fall 2021

Export

Export volume
2021F

324 billion US\$

Major export partners
2020



Major export products
2020



Import

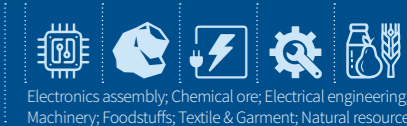
Import volume
2021F

322 billion US\$

Major import partners
2020



Major import products
2020

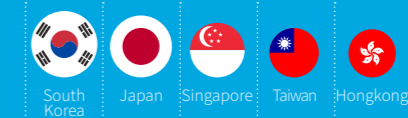


Investment

FDI net inflow
2021F

11.2 billion US\$

Major FDI contributors
2020



Major FDI sectors
2020



German-Vietnam Relations

German exports 2021
(Billion EUR)



3.7

Major German products

Export:
Machinery; Chemical ore; Electrical engineering; Measurement/Control technology; Motor vehicles & spare parts; Foodstuffs

10.7 German imports 2021
(Billion EUR)



Import:
Electronics assembly; Footwear; Textile & Garment; Foodstuffs; Electrical engineering; Handbags and travel goods; Machinery

Our consulting services in ASEAN



Exploring the markets



HR services



Trade fair participation



Setting up



Finding partners

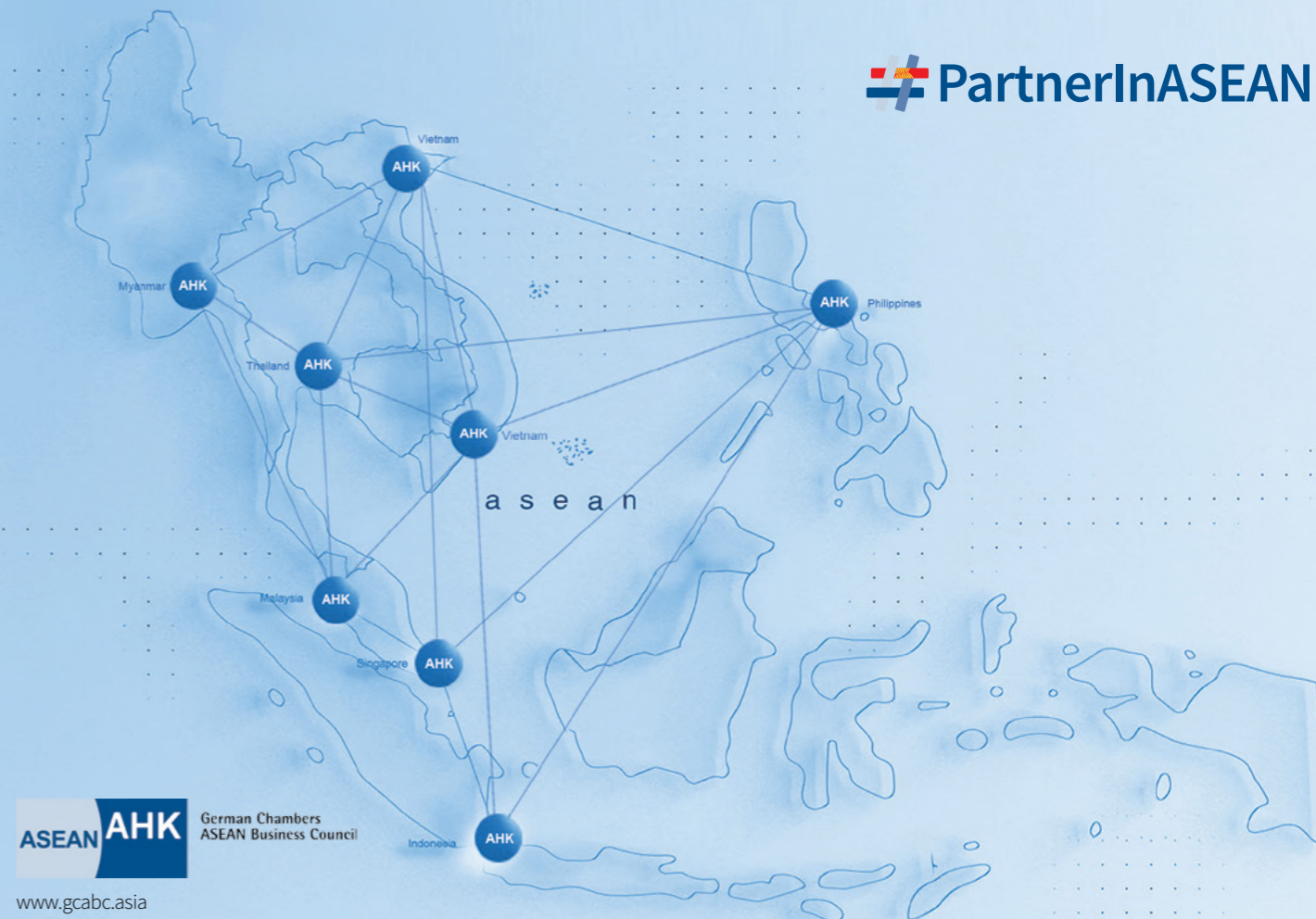


Education & Training



Scan me

The German Chambers of Commerce and Industry in Indonesia, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam established the German Chambers ASEAN Business Council to provide a dialogue platform, strengthen regional cooperation and to support regional trade and investment.



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