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ASEAN in Numbers: The $4.5 Trillion Bloc Meets in Manila as Trump, Xi and Putin Circle

Lead Author / Researcher: Alexander Vance & Strategic Intelligence Group

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EXECUTIVE SUMMARY

The 49th ASEAN Summit opens in Manila: a $4.5T bloc of 700m people, a 70%-done sea code, and a 100,000-dead Myanmar war the numbers behind the talks.

KEY RESEARCH FINDINGS & STRATEGIC OUTLOOK

Executive Summary Southeast Asia’s leaders open the 49th ASEAN Summit in Manila on Sunday, November 15, 2026, with the region’s biggest test in years on the table. The bloc gathers as the Philippines chairs three days of talks under the theme "Navigating Our Future, Together", while war in Myanmar, a still-unfinished sea code and an energy squeeze crowd the agenda. The leaders arrive as the world’s attention turns east: Donald Trump lands on Tuesday for his first Quad meeting of his second term, days before a planned trilateral with Xi Jinping and Vladimir Putin in Shenzhen . The numbers explain why the room matters. ASEAN’s 11 members form a $4.5 trillion economy of about 700 million people, growing at more than 4.5% a year, with $244 billion of foreign investment arriving in 2025 alone. Yet only about 22% of the bloc’s exports go to fellow members, against about 61% inside the European Union. This study measures the bloc’s economic weight, the cost of its two longest-running crises, and what the Manila summit can realistically deliver. Methodology This study rests on the International Monetary Fund’s September 2026 analysis of ASEAN, the bloc’s own trade data and the IMF World Economic Outlook, cross-checked against reporting of the summit from the Associated Press, Agence France-Presse and Philippine outlets covering the Manila meetings. Summit figures attendance, the code of conduct’s progress and the Myanmar review come from Philippine Department of Foreign Affairs briefings of November 12-13 and the draft communiques seen by the Associated Press. Conflict figures come from the United Nations: the Special Rapporteur on human rights in Myanmar told the General Assembly on October 27 that more than 100,000 people have been killed since the 2021 coup, and the UN refugee agency

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