This initiative maps the trade, investment, employment, business, diplomacy, security, education, tourism, and people-to-people connections between the United States and the Indo-Pacific at the national, state, and local levels. This publication, the one-page connections summaries for states and Congressional districts, and the AsiaMattersforAmerica.org website are resources for understanding the robust and dynamic US-Indo-Pacific relationship.

AsiaMattersforAmerica.org

Project Team

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Highlights

SECURITY
US Security Challenges and Opportunities in the Indo-Pacific Are Increasing
Australia, Japan, the Philippines, South Korea, and Thailand are US treaty allies and the US has expanded partnerships with other countries in the region.

TRADE
30% of US Goods and Services Exports Go to the Indo-Pacific
The Indo-Pacific is the United States’ largest trading partner, with nearly $1.8 trillion in total trade in a year.

JOBS
Three Million US Jobs Are Supported by Exports to and Investment from the Indo-Pacific
California alone has over 300,000 jobs supported by US exports to the Indo-Pacific’s markets, an increase of over 125,000 jobs in just five years.

INVESTMENT
The Indo-Pacific’s FDI in the US Grew by 112%, and US FDI in the Indo-Pacific Grew by 87% Within the Past Decade
The value of foreign direct investment (FDI) from the Indo-Pacific in the United States increased from $323 billion to over $684 billion during the past decade.

Highlights

TRAVEL AND TOURISM
The United States and Indo-Pacific Exchange Nearly 28 Million Visitors
Asian visitor spending contributed almost $90 billion to the US economy in a year.

EDUCATIONAL EXCHANGE
Students from the Indo-Pacific Contribute More Than $25 Billion to the US Economy
Over 730,000 Asian students study in the United States in an academic year, more than twice the number from the rest of the world combined.

POPULATION
Asians Are the Fastest Growing Population Group in the United States
Most recent data show that immigrants from the Indo-Pacific accounted for 29% of naturalizations in the United States over a year, totaling nearly 216,500.

SISTER PARTNERSHIPS
The United States and the Indo-Pacific Share Over 1,000 Sister State and City Relationships
The United States has more sister city relationships with the Indo-Pacific than with any other region in the world.
The Indo-Pacific Is a Region of Growing Importance

The Indo-Pacific region is home to more than half the world’s population, speaking 3,000 languages. This region includes the most populous country in the world (China), the largest democracy (India), and the largest Muslim-majority country (Indonesia).

Two of the three biggest global economies (Japan and China) are located in the Indo-Pacific and the region’s overall gross domestic product (GDP) totals $273 trillion. The Indo-Pacific is the fastest growing economic region in the world, with a growth rate of 5.7%. An estimated 60% of global maritime trade traverses the sea lanes of the South China Sea, and the region boasts nine of the 10 largest ports in the world.

The Indo-Pacific also hosts three of the five largest standing military forces. Five countries are treaty allies of the United States, and there are more US troops stationed in the Indo-Pacific than in any other region in the world.

### ASEAN*
- Population: 647 million
- Gross Domestic Product (GDP): $2.77 trillion
- ASEAN’s 10 member states combined are the 5th largest Indo-Pacific investor in the United States.

### JAPAN
- Population: 127 million
- Gross Domestic Product (GDP): $4.87 trillion
- One of the United States’ closest allies, Japan is the top foreign investor in the United States.

### AUSTRALIA
- Population: 25 million
- Gross Domestic Product (GDP): $1.32 trillion
- The United States and Australia have been allies since 1951 and have had a free trade agreement since 2005.

### SOUTH KOREA
- Population: 51 million
- Gross Domestic Product (GDP): $1.53 trillion
- South Korea is a free trade partner and a treaty ally of the United States.

### CHINA
- Population: 1.39 billion
- Gross Domestic Product (GDP): $12.24 trillion
- China is the United States’ largest trade partner in the Indo-Pacific.

### TAIWAN
- Population: 24 million
- Gross Domestic Product (GDP): $579.3 billion
- Taiwan is a democracy and is among the United States’ 10 largest trade partners.

### INDIA
- Population: 1.34 billion
- Gross Domestic Product (GDP): $2.6 trillion
- India has been designated a Major Defense Partner and a top-tier Strategic Trade country for the United States.

### PACIFIC ISLANDS**
- Population: 12 million
- Gross Domestic Product (GDP): $30.8 billion
- The United States provides the Pacific Islands with economic development assistance and has important security and military ties in the region.

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†The Asia Matters for America initiative defines the region as those countries comprising the US Indo-Pacific Command area of responsibility.

*The Association of Southeast Asian Nations (ASEAN) member countries are Brunei, Cambodia, Laos, Indonesia, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam.

**Pacific Islands includes independent member countries of the Pacific Islands Conference of Leaders (PICL): Fiji, Kiribati, Marshall Islands, Federated States of Micronesia, Nauru, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, and Vanuatu.

Sources: World Bank and CIA World Fact Book, 2017 data
Numbers rounded throughout publication. All monetary values are in US$ unless otherwise noted. Whenever possible, most recent available data is used. For the most up-to-date data please visit AsiaMattersforAmerica.org
US Security Challenges and Opportunities in the Indo-Pacific Are Increasing

The Indo-Pacific region is home to US allies and partners, rising powers whose choices affect the United States’ safety and prosperity, and key security challenges ranging from nuclear weapons to contested territory. Australia, Japan, the Philippines, South Korea, and Thailand are US treaty allies and the United States has expanded partnerships with other countries in the region. Many countries in the Indo-Pacific have achieved impressive economic growth over the past quarter century. The region is key to successfully handling global challenges such as equitable economic growth, environmental degradation, pandemic diseases, illegal trafficking, and global governance. However, in the region serious security problems such as historical animosities, territorial disputes, and weak regional institutions persist. China’s extraordinary economic and military development, with a combined assertive and cooperative approach to regional relations, is a central dynamic shaping the region.

For the United States, alliances and partnerships remain the bedrock of its approach to the region. The United States is devoting more attention and resources there, given ongoing security challenges including working with regional groupings such as the East Asia Summit (EAS), the Asia-Pacific Economic Cooperation (APEC) forum, and the Association of Southeast Asian Nations (ASEAN). The Indo-Pacific region is home to US allies and partners, rising powers whose choices affect the United States, that focus on coordinating military exercises with the United States, that focus on coordinating military exercises with the United States over the last century. Australia holds several annual and biennial programs with the United States, that focus on coordinating responses to emergency situations and security threats. The Philippines plays an important role in cooperating with the United States on maritime security and counterterrorism. In recent years, the United States delivered over $100 million worth of defense equipment to the Philippines.

Excluding Hawai’i, the United States has nearly 87,000 active duty troops in the Indo-Pacific region, stationed at over 180 US military installations and bases. Japan is home to the most facilities, with 80, followed by South Korea with over 60 facilities. In recent years, the United States delivered over $6 billion in defense equipment to the region, with $2 billion going to Australia alone, and over $1 billion to South Korea. The United States maintains dozens of regular military exercises with Indo-Pacific countries, both bilateral and multilateral. Additionally, the US National Guard conducts the State Partnership Program (SPP), which links a US state’s National Guard with a partner nation’s military/security forces to conduct security cooperation exercises, disaster response training, and leadership development programs, and to cultivate institutional relationships. Currently, six US states are partnered with nine countries in the region, holding over 100 events in a single year.

**TOP 10 COUNTRIES**

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<th>US MILITARY ASSISTANCE* IN THE INDO-PACIFIC</th>
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<td><strong>1</strong> Philippines</td>
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<td><strong>2</strong> Indonesia</td>
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<td><strong>3</strong> Vietnam</td>
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<td><strong>4</strong> Nepal</td>
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<td><strong>5</strong> Thailand</td>
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**30% of US Goods and Services Exports Go to the Indo-Pacific**

The Indo-Pacific is the United States’ largest trading partner, with nearly $1.8 trillion in total trade in a year.

The United States exports nearly $700 billion in goods and services to the Indo-Pacific, a 47% increase over a decade. The United States exports more to the Indo-Pacific than to Canada and Mexico combined. Three of the United States’ 20 Free Trade Agreement (FTA) partners are in the Indo-Pacific (Australia, South Korea, and Singapore). An additional 14 countries in the region maintain Trade and Investment Framework Agreements (TIFAs) with the United States, including nine ASEAN member countries (Singapore has an FTA). Five of the United States’ top 10 bilateral trading partners are in the Indo-Pacific: China(1st), Japan(4th), South Korea(7th), India(9th), and Taiwan (10th).

**US GOODS AND SERVICES EXPORTS TO THE INDO-PACIFIC BY STATE**

- South Korea is Montana’s 2nd largest export market.
- Wyoming’s exports to India have grown faster than to any other country in the world, up to $17 million from $34 thousand a decade before.
- Singapore has increased its purchases of Maryland’s exports by $139 million in the last ten years.

**Over a decade, Missouri’s exports to Myanmar increased 255-fold, from $16,000 to more than $4 million.**

Source exports line graph: US Bureau of Economic Analysis, 2008-2017 data
Source US map and composition of exports: Estimated by the Trade Partnership (Washington, DC), 2016 data
The Indo-Pacific accounts for 40% of the total world exports to the United States with nearly $1.2 trillion in goods and services exported in a single year. Europe ranks 2nd among the United States’ largest regional trade partners, with nearly $740 billion in exports to the United States in the same period.

**INDO-PACIFIC GOODS EXPORTS TO THE US BY COUNTRY**

South Korea, the United States’ 3rd largest export partner in the Indo-Pacific region, saw a 41% increase in exports over a decade.

Vietnam’s exports to the US grew 300% over a decade, the highest growth rate among ASEAN member states.

**EXPORTS TO THE US BY REGION**

The Indo-Pacific’s exports to the US grew by nearly 40% in the last decade.

**GROWTH OF INDO-PACIFIC EXPORTS**

Source: US Bureau of Economic Analysis (BEA), 2016 data
Source pie chart: US BEA, 2017 data
Source Indo-Pacific map: US International Trade Administration, 2016 data

**TOP 10 COUNTRIES**

Source: US Bureau of Economic Analysis (BEA), 2016 data
Source pie chart: US BEA, 2017 data
Source Indo-Pacific map: US International Trade Administration, 2016 data
Three Million US Jobs Are Supported by Exports to and Investment from the Indo-Pacific

US exports to the Indo-Pacific directly support 1.8 million US jobs. Twenty-nine US states have at least 20,000 jobs supported by exports to the Indo-Pacific. California alone has over 300,000 jobs supported by US exports to the Indo-Pacific’s markets, an increase of over 125,000 jobs in just five years. Additionally, exports to the Indo-Pacific support up to 1.7 million indirect jobs* throughout the United States.

Over 1.2 million Americans are employed by Indo-Pacific majority owned multinational enterprises (MNEs) in the United States. Greenfield investment** from Indo-Pacific countries has created over half a million jobs, including over 90,000 in California and over 50,000 in Texas.

**US EMPLOYMENT AT FOREIGN MAJORITY OWNED ENTERPRISES

18% of US jobs at foreign owned enterprises are at Indo-Pacific companies

9% Canada 6,368
9% Europe 4,319
63% Other 638
18% Indo-Pacific 1,228

*Adding direct and indirect jobs estimates would provide the national job impact of a congressional district’s exports for a given industry, but would overstate the number of jobs supported in the district itself.
**Greenfield investment refers to the building or expansion of new facilities rather than purchases or merges with existing companies.

Source US map: Estimated by the Trade Partnership (Washington, DC), 2016 data
Source greenfield investment jobs: fDi Markets, January 2003-August 2018 data
Source foreign MNE employment: US Bureau of Economic Analysis (BEA), 2015 data
The Indo-Pacific’s FDI in the US Grew by 112%, and US FDI in the Indo-Pacific Grew by 87% Within the Past Decade

The value of foreign direct investment (FDI) from the Indo-Pacific in the United States increased from $323 billion to over $684 billion during the past decade. Concurrently, US FDI in the Indo-Pacific increased to over $940 billion, up from $502 billion. Japan and South Korea are the only Indo-Pacific countries that invest more in the United States than vice versa.

DIRECT INVESTMENT GROWTH

Two-way direct investment has grown steadily between the United States and the Indo-Pacific.

US DIRECT INVESTMENT IN INDO-PACIFIC COUNTRIES BY INDUSTRY*

- Holding Companies (Nonbank): $28b
- Mining: $35b
- Professional, Scientific, and Technical Services: $38b
- Information: $42b

INDO-PACIFIC INVESTMENT IN THE UNITED STATES BY INDUSTRY**

- Manufacturing: $39b
- Wholesale Trade: $169b
- Finance: $136b
- Real estate and rental and leasing: $21b

*Countries represented include Australia, China, Hong Kong, India, Indonesia, Japan, South Korea, Malaysia, New Zealand, Philippines, Singapore, Taiwan, and Thailand. Depository institutions, insurance, and industries listed by the US BEA as “Other” are excluded.

**Countries represented include Australia, China, Hong Kong, India, Japan, South Korea, Malaysia, New Zealand, Singapore, and Taiwan. Depository institutions, insurance, and industries listed by the US BEA as “Other” are excluded. Source line graph and map: US Bureau of Economic Analysis (BEA) Direct Investment Position Data, 2009-2017 data. Source US investment by industry: US Bureau of Economic Analysis (BEA) US Direct Investment Abroad on a Historical-Cost Basis, 2017 data.
Indo-Pacific companies have invested in every US state. Indo-Pacific greenfield investment—which includes building new facilities rather than purchasing or merging with existing ones—has totaled over $240 billion since 2003. Over 41% of this investment comes from Japanese companies, the single largest global investor in greenfield projects since 2003. Six states have received over $10 billion in Indo-Pacific greenfield investment since 2003.

Samsung, based in South Korea, is the largest investor in greenfield projects in the United States, having invested over $15 billion. Toyota, a Japanese car manufacturer, has invested more than $14 billion in over 100 US greenfield projects since 2003, creating an estimated 35,000 jobs across the United States.

Source: fDi Markets, January 2003-August 2018 data
The United States and the Indo-Pacific Exchange
Nearly 28 Million Visitors

Over 15 million visitors from the Indo-Pacific came to the United States, accounting for 20% of all overseas visitors in a year. Asian visitor spending contributed almost $90 billion to the US economy in a year. Travel and tourism from the Indo-Pacific benefit every region of the United States, with nearly half of US states each receiving over $1 billion in revenue from Asian visitors in a single year. US airlines offer direct flights from 21 US cities, connecting to 31 cities in 12 Indo-Pacific countries.

VISITOR SPENDING FROM THE INDO-PACIFIC

Los Angeles has the most direct flights to the Indo-Pacific of any US city, offering 21 direct flights to cities in 9 countries.

Illinois receives the largest amount of visitor spending in the Midwest, at nearly $4 billion.

Source US map: Estimated by the Trade Partnership, 2016 data
Source top ten list: Bureau of Economic Analysis (BEA), 2016 data
Nearly 11.5 million Americans visited the Indo-Pacific in a one year period. China, India, and Japan are the top three destinations for US tourists. In all but nine countries in the region, travel from the United States increased from the year prior.

China and Japan each saw an increase of over 100,000 visitors from the United States. Visitor spending by Americans contributed over $37 billion to Indo-Pacific countries in a year. China ($5.4 billion), Japan ($4.3 billion), and South Korea ($3.6 billion) lead the region in revenue from US visitors.

Spending $13.4 billion in a year, India contributes the 3rd most travel revenue to the United States from the Indo-Pacific, behind China ($33.2 billion) and Japan ($16.6 billion).

The Philippines has the highest volume of two-way travel with the United States of all Southeast Asian countries, and the 6th highest volume in the Indo-Pacific, with 1.3 million tourists exchanged in a year.

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Students from the Indo-Pacific Contribute More Than $25 Billion to the US Economy

Nearly 68% of international students in the United States are from the Indo-Pacific. Over 730,000 Asian students study in the United States in an academic year, more than twice the number from the rest of the world combined. The Asian student population has grown by over 92% in the last ten years, up from 380,000. These students support over 300,000 jobs across the United States, contributing more than $25 billion to the US economy. Over 67% of foreign undergraduate students are from the Indo-Pacific, with the number for graduate students exceeding 73%.

International Students from the Indo-Pacific

The Indo-Pacific's Share of All International Students

1. Delaware 84%
2. Washington 81%
3. Hawaii 79%
4. Indiana 78%
5. Iowa 78%
6. New Hampshire 77%
7. Illinois 75%
8. California 74%
9. Missouri 74%
10. Oregon 73%

Economic Contribution of Students from the Indo-Pacific

1. California $4.4 billion
2. New York $3.4 billion
3. Massachusetts $1.8 billion
4. Texas $1.5 billion
5. Pennsylvania $1.4 billion
6. Illinois $1.1 billion
7. Ohio $831 million
8. Indiana $811 million
9. Michigan $805 million
10. Washington $682 million

Sources: Institute of International Education (IIE), Open Doors data; NAFSA: Association of International Educators, 2016/17 data
Nearly 20% of Americans studying abroad go to the Indo-Pacific. The Indo-Pacific is an increasingly popular location for US students to study abroad, with nearly 50,000 Americans studying in the region, an increase of nearly 30% from a decade before. Though China and Australia are the most popular destinations for US students, study abroad in Southeast and South Asian countries has increased by 92% and 73% respectively in the last decade.

US STUDENTS IN THE INDO-PACIFIC

The US Department of State’s Bureau of Educational and Cultural Affairs (ECA) administers many exchange programs that both US and non-US citizens may apply to, including the well-known Fulbright Program, which is accessible to students, teachers, and scholars in almost every Indo-Pacific country. Nearly 18,400 participants have been involved in Fulbright exchanges between the United States and the Indo-Pacific in the last ten years.

In total, US citizens going to India have received over 4,160 Fulbright Grants since 1949. India is by far the most prolific recipient in the region.

In Indonesia, the number of US students studying abroad has increased from just over 50 US students to nearly 600 in under a decade.

Taiwan has more than doubled its share of incoming US students in the last decade, up 110%.

The number of US students studying abroad in Indonesia has increased from just over 50 US students to nearly 600 in under a decade.

Sources: Institute of International Education (IIE), Open Doors data; US Bureau of Educational and Cultural Affairs
Asians Are the Fastest Growing Population Group in the United States

Among the US population, 6% identifies as Asian or Australian.* Nearly 20 million people in the United States identify with an Asian ethnicity, including an estimated 100,000 claiming Australian ancestry. Over six years, the Asian population grew by 21%, making it the fastest growing ethnicity in the United States. In that time, the Asian and Australian population has increased by over 50,000 people in 17 separate US states. California and Texas alone saw a combined increase of over one million.

ASIAN AND AUSTRALIAN POPULATION BY US STATE

Minnesota has the 2nd largest Hmong population (an ethnic group with populations throughout Southeast Asia and Southern China) in the United States, with over 75,000 people.

Ohio is home to the United States' largest Bhutanese population.

Indian Americans are Texas' largest Asian population group, and Texas is home to the 4th largest Indian American population in the United States at nearly 350,000.

TOP 10 STATES

AVERAGE ANNUAL GROWTH RATE OF FASTEST GROWING ASIAN AND AUSTRALIAN POPULATIONS

1. South Dakota 9%
2. North Dakota 8%
3. Wyoming 6%
4. Missouri 6%
5. Nebraska 6%
6. Indiana 6%
7. Iowa 5%
8. Delaware 5%
9. North Carolina 5%
10. West Virginia 5%

Sources: US Census Bureau, 2010 data; American Community Survey, 2016 data
REMITTANCES, NATURALIZATION AND IMMIGRATION

Immigrants from the Indo-Pacific accounted for 29% of naturalizations in the United States, totaling nearly 216,500. This reflected a positive growth rate of 6% over a 10-year period. Over $51 billion of US remittances were sent to the Indo-Pacific in a year, making up 37% of the total remittance outflow from the United States.

US REMITTANCES TO THE INDO-PACIFIC

Asians and Australians account for 29% of US citizenship naturalizations.

THE INDO-PACIFIC’S SHARE OF US NATURALIZATIONS

TOP 10 COUNTRIES OF ORIGIN FOR US NATURALIZATIONS

1. India  46,188
2. Philippines  41,285
3. China  35,794
4. Vietnam  24,848
5. South Korea  14,347
6. Bangladesh  9,949
7. Myanmar  6,956
8. Bhutan  5,563
9. Thailand  5,211
10. Nepal  5,004

Sources: US Department of Homeland Security; US Department of State, Bureau of Population, Refugees, and Migration
The United States and the Indo-Pacific Share Over 1,000 Sister State and City Relationships

The United States and the Indo-Pacific share 949 sister city relationships and 89 sister state relationships. Sister relationships foster civic and people-to-people relationships, as well as commercial ties between states, cities, and other jurisdictions in the United States and foreign countries.

SISTER PARTNERSHIPS BETWEEN THE US AND THEindo-PACIFIC

California has 245 sister partnerships with the Indo-Pacific, the most of any state. Japan maintains the most sister partnerships with the United States with 451. The first US sister city relationship in the Indo-Pacific was formed between St. Paul, Minnesota, and Nagasaki, Japan, on December 7th, 1955 (the 14th anniversary of Pearl Harbor). The United States has more sister city relationships with the Indo-Pacific than with any other region in the world.

San Antonio, TX has hosted an annual Diwali festival since 2011 to promote its sister city relationship with Chennai, India.

Lexington, KY and Shinhidaka, Japan share a sister relationship because of their mutual connection to the horse industry.

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The state of Hawai‘i maintains 13 sister state relationships with provinces and prefectures in China, Japan, Taiwan, South Korea, and the Philippines – the most of any state.

Eugene, OR and its sister city, Jinju, South Korea are connected through similar rivers, the Willamette River and the Nam River, respectively, coursing through the middle of their cities.

Stratford, CT and Stratford, New Zealand are part of a group of sister cities that share the name “Stratford”. They meet once every two years in one of the cities to celebrate their Shakespearean namesake and engage in cultural exchange.

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THE ASIA MATTERS FOR AMERICA INITIATIVE

Asia Matters for America/America Matters for Asia is an interactive resource for credible and nonpartisan information, graphics, analysis, and news on US-Indo-Pacific relations at the national, state, and local levels.

AsiaMattersforAmerica.org
Asia Matters for America / America Matters for Asia

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