

ASEAN-韓国自由貿易協定（AKFTA）アップグレードに 関するスコーピング調査の戦略的含意

Strategic Implications of The ASEAN-Korea FTA (AKFTA) Upgrade Scoping Study

【要約】

ASEAN-韓国自由貿易協定（AKFTA）は、2025 年の両国地域間の合意を受けて高度化に向けた検討を進めている。従来の物品貿易中心の協定から、デジタル貿易、グリーン経済、サプライチェーン強靱化、中小企業支援を含む包括的な経済連携へ転換する。

韓国は 2029 年までに ASEAN との年間貿易額 3,000 億ドルを目標とし、電池・EV、重要鉱物、デジタル分野で優位性を強化する見込みで、日本企業にとって競争圧力が高まる。特に資源確保、デジタル連携、物流、ASEAN 市場アクセスで影響が大きい。日本企業は ASEAN・韓国の交渉動向を把握しつつ、ASEAN とのデジタル・資源分野の連携強化、および日本企業の既存の品質・信頼性の強化など戦略的対応が求められる。

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Title: Strategic Implications of The ASEAN-Korea FTA (AKFTA) Upgrade Scoping Study

Country/Region: ASEAN, Indonesia

Written Date: December 2025

Overview

The ASEAN-Korea Free Trade Area (AKFTA) is set to undergo a comprehensive upgrade following the [endorsement](#) of a Joint Scoping Paper on October 23, 2025. At the 26th ASEAN-Republic of Korea Summit in Kuala Lumpur, ASEAN and Korea agreed to launch formal negotiations for the upgrade in early 2026, upon completion of respective domestic procedures.

President Lee Jae Myung announced a target of [US\\$300 billion](#) in annual trade volume between ASEAN and Korea by 2029, up from [US\\$187.1 billion](#) in 2023. The upgrade will transform AKFTA from a traditional "Trade in Goods" agreement into a "Strategic Economic Partnership" covering digital trade, green economy, supply chain resilience, and MSME inclusion. ASEAN is Korea's third-largest trading partner, while Korea is ASEAN's second-largest trading partner.

For Japanese companies, the AKFTA upgrade carries significant competitive implications, particularly in sectors where Japan and Korea directly compete for ASEAN market share and supply chain integration.

Operational Impact & Competitive Dynamics

Priority Area	AKFTA 2.0 Scope	Competitive Implication for Japanese Firms
Digital Economy	Full "Digital Trade" chapter covering paperless trading, cross-border data flows, AI governance alignment.	Korea will secure preferential digital framework alignment with ASEAN concurrent with DEFA implementation. Japanese firms must accelerate bilateral digital trade engagement to maintain parity.
Accelerating DX / GX	New chapter on environmental goods tariff elimination (EVs, solar panels), carbon market cooperation.	Korea's EV battery manufacturers (LG, SK On, Samsung SDI) will gain enhanced market access. Japanese automakers and battery suppliers face intensified competition for ASEAN's green transition market.
Supply Chain Resilience	Crisis management mechanisms, critical minerals cooperation, export ban prevention.	Korea is securing direct access to ASEAN's nickel, tin, cobalt, and rare earth minerals. Japanese trading companies must accelerate mineral offtake and processing partnerships.
Trade	Modernized customs procedures,	Reduced transaction costs for Korea-ASEAN

Facilitation	full e-certification.	trade may shift cost advantages away from established Japan-ASEAN logistics networks.
MSMEs	Simplified digital customs, e-Form AK certification.	Korean SMEs will gain streamlined ASEAN market access, potentially displacing Japanese suppliers in certain segments.

Strategic Implications for Japanese Business

The AKFTA upgrade represents a competitive challenge across multiple dimensions. Korea is pursuing a coordinated strategy combining FTA modernization with bilateral agreements (five ASEAN bilateral FTAs concluded) and targeted sectoral cooperation. Japanese companies should consider the following:

1. **Monitor Negotiation Progress.** The 2026-2027 negotiation timeline aligns with the Philippines' ASEAN Chairmanship priorities. Track developments through JETRO offices in Seoul and key ASEAN capitals.
2. **Accelerate Japan-ASEAN Digital Integration.** With AKFTA including digital trade provisions concurrent with DEFA signing, Japan risks falling behind in establishing compatible digital trade frameworks with ASEAN.
3. **Strengthen Critical Minerals Positioning.** Korea's supply chain resilience chapter directly targets ASEAN's mineral resources essential for EV batteries. Japanese firms should intensify partnerships in Indonesia (nickel), Philippines (nickel, cobalt), and other resource-rich ASEAN states.
4. **Leverage Existing Advantages.** Japan maintains advantages in quality standards, sustainability credentials, and established regional production networks.

Priority Actions for Japanese Companies

Immediate (Q1 2026): Conduct strategic assessment mapping corporate operations against AKFTA 2.0 provisions. Identify sectors with significant competitive exposure (automotive, batteries, electronics, digital services) and evaluate countermeasures.

Near-term (2026): Engage through JETRO and bilateral channels to monitor negotiation progress and advocate for Japan-ASEAN framework enhancements where competitive gaps emerge. Strengthen critical minerals partnerships with key ASEAN resource countries.

Medium-term (2026-2028): Assess whether current Japan-ASEAN trade frameworks provide adequate positioning for digital economy, green transition, and supply chain resilience. Consider whether Japan should pursue ASEAN FTA modernization comparable to the Korean approach.