JETRO
日本貿易振興機構（ジェトロ）

ASEAN ブルーエコノミー推進計画：
地域成長の新たな原動力

ASEAN Blue Economy Implementation Plan: A New Engine for Regional Growth

【要約】

ASEAN ブルーエコノミー推進計画は、2023 年の枠組みを具体化し、金融・物的・人的・社会・自然の 5 資本に基づく 15 の施策を提示した。海洋経済は一部加盟国で GDP の最大 3 割を占め、また世界全体では水産物・水産加工品の総生産量のうち 2 割以上を占め、さらに年間最大 2 兆 5,000 億ドルの価値を持つ成長分野であり、ASEAN 成長の新たな原動力と位置付けられる。

日本は主要パートナーとして資金、技術、人材育成などで関与しており、本計画はインフラ整備、再エネ、ブルーカーボン、金融など幅広い分野で企業の参入機会を拡大する。日本企業にとっては各国の制度や発展段階に応じた戦略構築と、官民連携による長期的な事業展開が求められるとともに、個別分野にとどまらず、関連するサプライチェーンや制度環境を含めて検討することが重要となる。

Title: ASEAN Blue Economy Implementation Plan: A New Engine for Regional Growth

Country/Region: ASEAN, Indonesia

Written Date: December 2025

Overview

The **ASEAN Blue Economy Implementation Plan** was endorsed in October 2025, translating the ASEAN Blue Economy Framework (ABEF) adopted in 2023 into actionable initiatives across five "Blue Outcomes" based on a capital-based approach: **Financial Capital**, **Physical Capital**, **Human Capital**, **Social Capital**, and **Natural Capital**. The Plan identifies **15 activities and supporting initiatives** with an Implementation Roadmap scheduled for development by December 2025 and regional socialization workshops in February-March 2026.

ASEAN's blue economy represents substantial economic value: contributing up to 30% of GDP for some member states, over 20% of global fishery production, and marine resources with an estimated market value of up to US$2.5 trillion annually (5% of the global economy). With a third of global trade passing through ASEAN waters, the region's blue economy is positioned as a "new engine for growth" under the ASEAN Community Vision 2045.

Japan is already a leading partner in ASEAN blue economy development, funding the ASEAN Blue Economy Innovation Project (launched May 2024) and the ASEAN Blue Carbon and Finance Profiling Project (launched May 2025). The Implementation Plan creates structured pathways for expanded Japanese engagement across infrastructure, technology, financing, and capacity building.

Operational Impact & Key Opportunities

"Blue Outcome"	**Key Initiatives**	**Operational Opportunity for Japanese Firms**
Financial Capital	Regional Blue Financing Facility; Blue Trade & Value Chains; Blue SME Support	Japanese banks and trading companies may explore participation in blended finance mechanisms. Microfinancing and accelerator programs create investment pipelines for impact-focused capital.
Physical Capital	Blue Infrastructure Investment Strategy; Sustainable Port Development; Pilot Infrastructure Projects	Major opportunities in port modernization, offshore renewable energy (wind, tidal), aquaculture facilities, and cold chain infrastructure.
Human Capital	Workforce Development; ASEAN Centre of Excellence for Blue Economy Innovation; Inclusive	Technical training partnerships, R&D collaboration, and technology transfer arrangements. Positions Japan as a capability-

	Enterprise Support	building partner aligned with ASEAN's human capital priorities.
Social Capital	Regional Blue Economy Governance; ASEAN Blue Economy Index (ABEI); Regional Sandboxes & Knowledge Forums	Opportunity to influence measurement frameworks, standards development, and governance structures. Early engagement shapes the regulatory environment.
Natural Capital	Blue Carbon & Biodiversity Markets; Coastal Resilience & Spatial Planning; Environmental Sustainability for Blue Sectors	Japan's experience with blue carbon (included in national climate strategies) positions Japanese firms for carbon credit development, ecosystem restoration, and sustainable fisheries technology.

Strategic Implications for Japanese Business

Interdependent framework, not siloed sectors. The five Blue Capitals function as interconnected systems—Financial Capital enables Physical infrastructure, which requires Human Capital, governed through Social Capital, all dependent on Natural Capital. Japanese companies recognizing these linkages can position across multiple value chain nodes rather than competing in isolated segments.

Convert development partnership into commercial positioning. Japan's existing role as ASEAN's leading blue economy partner provides first-mover advantages that must now translate into market position. Companies aligning commercial engagement with Japan's broader partnership narrative will find more receptive counterparts than those pursuing purely transactional approaches.

Calibrate country strategies. ASEAN member states vary significantly in regulatory readiness, infrastructure maturity, and sectoral priorities. Some offer sophisticated regulatory environments suitable for regional hub functions; others present stronger project pipelines in specific sectors; still others offer scale but require patience with coordination complexities.

Priority Actions for Japanese Companies

Immediate (Q1 2026): Engage with the Implementation Roadmap development process through JETRO, the ASEAN-Japan Centre, and bilateral government channels. The regional socialization workshops (February–March 2026) provide direct engagement opportunities. Companies should identify which Blue Outcomes and activities align with corporate strategies and prepare engagement proposals.

Near-term (2026): Position for Regional Blue Financing Facility participation as design parameters emerge. Monitor blue infrastructure project pipelines through JETRO offices. Explore R&D partnerships with the emerging ASEAN Centre of Excellence for Blue Economy Innovation.

Medium-term (2026–2028): Deepen engagement as implementation gains traction and regulatory frameworks mature across member states. This phase is critical for standard-setting influence. Evaluate outcomes from early engagements and identify scaling opportunities in priority countries.

Long-term (2028–2030): Scale successful pilot projects and partnerships across ASEAN. Leverage workforce development investments to build operational capabilities. Position for expanded blue economy market access as regulatory harmonization progresses.