

## **ASEAN-カナダ自由貿易協定（ACAFTA）： 交渉状況と今後の見通し**

**ASEAN-Canada Free Trade Agreement (ACAFTA): Negotiation Status and Outlook**

### **【要約】**

ASEAN-カナダ自由貿易協定（ACAFTA）は 2021 年に交渉が開始され、2026 年の妥結を目指して最終段階に入っている。2025 年時点で物品・サービス貿易や投資など広範な分野を対象に交渉が進み、複数の章は既に合意済みである。一方、市場アクセスや原産地規則など主要分野はなお協議中だ。

本協定は貿易拡大やサプライチェーン統合、ルール整備を通じてカナダと ASEAN の経済関係強化を狙う。技術支援や能力構築も並行して実施されており、地政学的背景からカナダの対 ASEAN 重視も強まっているが、利害対立の大きい分も残り、交渉完了には不透明要因もある。

### **【免責条項】**

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**Title:** ASEAN-Canada Free Trade Agreement (ACAFTA): Negotiation Status and Outlook

**Country/Region:** ASEAN, Indonesia

**Written Date:** March 2026

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### Lead Paragraph

The ASEAN-Canada Free Trade Agreement (ACAFTA) is an ongoing negotiation launched on November 16, 2021, between Canada and the ASEAN member states. As of early 2026, negotiations are in an advanced but not yet concluded stage, with both sides officially [targeting conclusion in 2026](#). The most recent [high-level signal](#) came from Canadian Prime Minister Mark Carney's October 2025 visit to the ASEAN Summit in Kuala Lumpur, where he announced \$25 million in technical assistance to support the agreement's acceleration and implementation. At the 14th ASEAN Economic Ministers-Canada Consultation held on September 26, 2025, [ministers reaffirmed](#) their shared commitment to concluding a "high-quality, comprehensive, and mutually beneficial" agreement as soon as possible. [As of 2024](#), two-way merchandise trade between ASEAN and Canada stood at USD 23.5 billion, with Canadian FDI into ASEAN recorded at USD 4.9 billion, which positioned Canada as ASEAN's sixteenth largest trading partner and ninth largest source of foreign direct investment.

### Vision and Strategic Objectives

#### Overall Vision:

"A high-quality, comprehensive, and mutually beneficial free trade agreement that creates new market opportunities for Canadian goods and services, supports a more transparent and predictable environment for trade and investment, and strengthens Canada's presence in ASEAN's fast-growing markets."

Canada's formally stated negotiating objectives for the ACAFTA, [as published](#) by Global Affairs Canada:

- **Expand Market Access** — Secure preferential access for Canadian goods and services to ASEAN economies, including key markets such as Thailand and the Philippines where Canada currently lacks bilateral FTAs
  - **Strengthen Supply Chain Integration** — Promote further integration of Canadian businesses into ASEAN-linked global supply chains across sectors including agriculture, agri-food, fish and seafood, natural resources, manufacturing, and financial services
  - **Advance a Comprehensive Rules Framework** — Negotiate modern, high-standard rules across investment, intellectual property, digital trade, government procurement, and trade and sustainable development
  - **Support Trade Diversification** — Complement Canada's existing Indo-Pacific trade architecture, including CPTPP and the Canada-Indonesia Comprehensive Economic Partnership Agreement (CEPA, concluded September 2025), as part of Canada's broader objective to double exports to non-U.S. markets over the next decade
  - **Ensure Inclusive Outcomes** — Provide capacity support for the least-developed ASEAN member states to meaningfully participate in and benefit from the agreement
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## State of Negotiations: Active Negotiating Tables

The AFTA does not yet have a concluded framework to report. What exists is a set of active negotiating tables confirmed across the [11th](#) (January 2025, Bangkok), [12th](#) (March 2025, Jakarta), [13th](#) (May 2025, virtual), [14th](#) (July 2025, Kuala Lumpur), [15th](#) (September 2025, Bangkok), [16th](#) (November 2025, Manila), and [17th](#) (February 2026, Jakarta) Trade Negotiating Committee (TNC) rounds. As of TNC 17, the following is the confirmed status of all negotiating chapters:

### 1. Concluded Chapters

- Good Regulatory Practices (GRP)
- Cross-border Trade in Financial Services (CPTF)
- Transparency
- Small and Medium Enterprises (SMEs)
- Competition
- Government Procurement
- Economic and Technical Cooperation (ECOTECH)
- Sanitary and Phytosanitary Measures (SPS)
- Telecommunications
- Legal and Institutional Issues – *partially concluded; dispute settlement remains outstanding*

### 2. Chapters Still Outstanding

- Trade in Goods and Market Access – *tariff negotiation modalities agreed at TNC 12; first tariff offer exchange committed to but not yet reported as complete*
- Rules of Origin – Canada has tabled proposed rules for 5,612 items; ASEAN member states still reviewing
- Trade in Services – *Mode 3 commitments and chapter modalities still under discussion*
- Investment – *modalities still under discussion*
- E-commerce
- Intellectual Property
- Trade and Sustainable Development (TSD) – *structured around three sub-groups (Inclusive Trade, Labour, Environment); ASEAN draft proposal still being prepared*
- Exceptions and Dispute Settlement – *explicitly reserved for the final negotiating stage*

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## Supporting Mechanisms and Capacity Building

Alongside the formal negotiations, two officially confirmed support mechanisms are operational:

### 1. ASEAN-Canada Plan of Action Trust Fund

- A [CAD 11.7 million initiative](#) implemented by the ASEAN Secretariat providing technical assistance, services, training, research, and inclusive economic development activities in the sectors of energy, digital economy, and food security
- Also funds the participation of least developed ASEAN countries in TNC negotiation rounds

### 2. Expert Deployment Mechanism (EDM)

- A Canadian government mechanism providing targeted technical assistance to ASEAN member states to support their engagement in specific negotiating chapters

Both mechanisms were noted and welcomed at [the 14th AEM-Canada Consultation](#) as crucial components supporting the ongoing negotiations.

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### Alignment with Broader Frameworks

The ACAFTA sits within a broader framework of Canada-ASEAN strategic engagement:

- Directly advances [Canada's Indo-Pacific Strategy \(IPS\)](#), launched November 2022, which identifies ASEAN as a priority region and explicitly affirms ASEAN centrality and the ASEAN Outlook on the Indo-Pacific
  - Builds on the elevation of Canada-ASEAN relations to a [Strategic Partnership](#) in 2023
  - Complements [the Canada-Indonesia CEPA](#) (concluded September 2025), Canada's first-ever bilateral trade agreement with an ASEAN member state, which reduces or eliminates tariffs on over 95% of current Canadian exports to Indonesia
  - [Canada's 2025-2028 co-chairship](#) of the OECD Southeast Asia Regional Programme (SEARP), alongside the Philippines, provides a parallel policy reform support channel for ASEAN member states
  - Supported by the Canada-ASEAN Business Council (CABC), which has been formally engaged in the process and has submitted recommendations on priority cooperation areas including the digital economy, sustainable energy, and food security
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### Final Assessment

The ACAFTA has entered what both sides are now formally describing as its final negotiating stage. The conclusion of nine full chapters and partial conclusion of a tenth as of TNC 17 (covering governance, services-adjacent, and institutional areas) indicates progress in several areas of the negotiations. The acceleration in meeting frequency, the introduction of a revised Comprehensive Work Plan, and Timor-Leste's first participation as observer collectively signal that both sides are treating 2026 as a genuine deadline rather than a rolling target.

That said, the remaining chapters include areas that often require detailed negotiations in FTAs. Trade in goods, market access, rules of origin, investment, and dispute settlement are where commercial interests diverge most sharply across ASEAN member states with very different export structures, tariff sensitivities, and regulatory environments. The fact that these were explicitly reserved for the final stage at TNC 17 reflects their political difficulty, not just technical complexity. The 2026 conclusion target has already slipped once from 2025, and the remaining issues are materially more contentious than those already closed.

The geopolitical context, however, adds genuine urgency that was absent in earlier rounds. Canada's stated objective of diversifying trade with markets beyond North America – accelerated by tariff and trade relationship uncertainty in 2025 – gives the Carney government a strong domestic political incentive to close the deal on terms ASEAN can accept. This dynamic has meaningfully shifted the negotiating atmosphere since the earlier, slower rounds.

For Japanese companies, three areas warrant active monitoring:

1. **Rules of Origin and Tariff Schedules (immediate: 2026)** — Final rules will directly affect cost competitiveness of goods manufactured in ASEAN with Japanese supply chain participation, particularly in automotive, electronics, and food processing. Companies should begin scenario planning now against likely tariff offer ranges before schedules are finalized
2. **Third-Country Investment Effects (near-term: 2026-2027)** — A concluded ACAFTA will enhance ASEAN's attractiveness as a manufacturing base for Canadian market access, potentially intensifying investment competition with Japanese firms in Vietnam, Thailand, Malaysia, and Indonesia
3. **Services and Digital Trade Openings (ongoing)** — Once concluded, the services, investment, and e-commerce chapters will shape market access conditions for financial services, logistics, and digital platforms — sectors where Japanese firms are increasingly active across ASEAN

The window to engage Canadian and ASEAN trade officials to flag supply chain interests before chapters close is narrow and closing. Companies with material exposure to ASEAN-Canada trade flows should be tracking the first half of 2026 closely.