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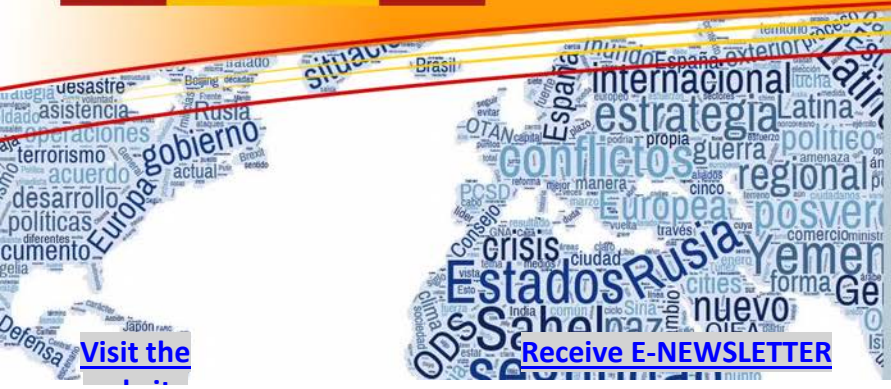
Japan, resources and projection in an expanded Indo-Pacific



Japan, resources and projection in an expanded Indo-Pacific

Abstract:

In the current global competition for access to strategic resources, Japan is an example of initiative and an alternative path to achieving self-reliance and independence from other powers, both in access to these resources and in their transportation and refining processes. Oil, gas, and rare earths exemplify Japan's strong attempt to secure its reserves and supply chains, aiming to reduce any risk to its economy. All of this is reflected in its external assertiveness, within the Free and Open Indo-Pacific initiative, as well as in other sectoral strategies that include defence and security. These efforts position Japan as a dynamic country in more distant and diverse settings such as Africa and the Arctic. Japan also pursues a renewed maritime projection focused, first, on safeguarding its own borders in a conflict-ridden setting adjacent to the South China Sea, but also on protecting these interests beyond them.

Keywords:

Japan, Indo-Pacific, Rare Earths, Navy, Arctic.

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Introduction

The Japanese economy, currently the fourth largest in the world, is highly dependent on imports of resources that drive its various sectors. In particular, two of these resources account for approximately 94% of its energy needs; both must be purchased on the external market and transported to Japan by sea. First and foremost is oil, as both crude and refined oil are two of the country's main imports, worth $98 billion in 2023, a figure that rises to $150 billion if liquefied petroleum gas is included in the total imports. The Persian Gulf countries—in the case of crude and refined oil—together with Australia and the United States—in the case of liquefied oil—are Japan's main suppliers (Observatory of Economic Complexity, 2025) .

It is also noteworthy that another energy resource ranks third among Japanese imports: coal briquettes, compressed blocks used as fuel that offer a more sustainable alternative to fossil fuels, with Australia once again as the main supplier. Beyond energy resources, integrated circuits and smart devices appear in the top five Japanese imports, worth $53 billion. These circuits come mainly from Taiwan and China. As in the case of oil, maritime transport is the only means of supply, so the security of such transport is crucial to Japan's economic future.

On the other hand, Japan is a net exporter of vehicles, technological accessories and integrated circuits that require components whose resources increasingly come from the market for rare earth minerals, which is almost entirely dominated globally by China, from extraction to distribution and refining. Beyond the resilience of this supply chain, the problem for Japan is that there could be a deliberate disruption as a result of a political decision by China, and this would not be the first time this has happened. In September 2010, a Chinese fishing boat was boarded by Japanese coastguard vessels off the disputed Senkaku Islands in the South China Sea. In retaliation, the Chinese government halted exports of rare earth minerals to Japan. Its economy faltered, especially the automotive industry, as the production of its magnets depended on Chinese imports for 90% of its supply, but other sectors such as technology were also compromised. A year after the incident, with trade normalised, the price of these minerals was still ten times higher, but Japan had already learned valuable lessons (Evenett & Fritz, 2023) .

Thus, regardless of the uncertain composition of the Japanese government, it is undeniable that Japan is vulnerable due to its structural dependence on imports of these strategic resources. It is an urgent and current problem, but at the same time, it is a long-standing dependence, as the strangulation of these resources already motivated, for example, its expansion in the 1930s and 1940s.

Today, all this is taking place against a backdrop of growing rivalry with China, energy transition and international dilemmas: the main ones being its relationship with the United States in economic and security matters, as well as its position on Taiwan. Added to this is the need to have diverse allies in the region and beyond, a search for alliances that, since the Abe era, has been one of the cornerstones of Japanese strategy and its pacifist principles (Johnstone, Szechenyi, & Klaas, 2024) .

In this way, today's Japan is articulating a combined strategy of resource diplomacy, the search for greater autonomy and naval projection, extending its gaze beyond the Strait of Malacca to the Arctic, in an increasingly broad Indo-Pacific.

Supply diversification

In February 2004, the Japan Oil, Gas and Metals National Corporation (JOGMEC) was founded, a government agency that merged other previously existing agencies with the aim of promoting natural gas as an alternative to the country's almost total dependence on oil, strengthening competitiveness in the Japanese metal mining industry and, most importantly, to ensure a stable and sustainable supply of crude oil, metals and minerals that are strategic for the country's economy. JOGMEC is therefore crucial to the future of these strategic supplies in Japan.

At the end of 2010, Japan approved a supplementary budget of $1.2 billion to address the emergency caused by the disruption of strategic mineral supplies following the suspension of Chinese exports.

This measure, promoted by Prime Minister Naoto Kan of the Democratic Party, was part of a strategy aimed at securing the supply of critical minerals. This strategy endured over time and was maintained, for example, when the Liberal Democratic Party regained power in late 2012 under Shinzo Abe, now considered the architect of the Free and Open

Indo-Pacific (FOIP) doctrine, outlined in 2016, as well as the strengthening of Japan's foreign projection and security policy.

The FOIP vision has become the cornerstone of Japanese foreign policy, connecting various fields of interest such as defence, supply chain security and the protection of routes that are crucial to the country's future. In 2023, in New Delhi, then Prime Minister Fumio Kishida also spoke of the geopolitical scope of the concept, expanding it from a geographical point of view:

> The next horizon is South Asia, including India [...] And then, the Pacific Islands region. The waters connecting Japan and the Pacific island countries have no borders. Of course, countries in the Middle East, Africa, Latin America and other regions are also important partners in realizing FOIP[1] .

For its part, the 2010 plan had five main pillars: investing in technology that would reduce the use of rare earth minerals; promoting their processing and recycling in the country; conducting prospecting for domestic deposits; diversifying the risk that a halt in imports from China would once again jeopardise the country's economy, for which it was decided to source these minerals from Australia and other places, with a focus on Africa; and, finally, having its own storage capacity to ensure sufficient reserves in critical periods. A year later, Japan Australia Rare Earth (JARE) was founded in 2011 by Sojitz and JOGMEC to participate in the Australian corporation Lynas Rare Earths Limited, which today operates the Mount Weld, Kagoorlie, Perth and Kuantan deposits, the latter mine being located in Malaysia (Japan Organisation for Metals and Energy Security, 2023) .

It was not only Australia, as other regions with deposits also attracted attention, such as Lobatse in Botswana, where in 2008 JOGMEC established a satellite geological remote sensing Centre in partnership with the African country's Department of Geological Studies.

[1] KISHIDA, Fumio. "Japan's New Plan for a 'Free and Open Indo-Pacific'". 20 March 2023. Available at: 100477739.pdf (accessed 16/10/2025). For everything related to the FOIP vision: Free and Open Indo-Pacific | Ministry of Foreign Affairs of Japan (accessed 16/10/2025)

In addition, agreements were signed for mining exploration, for example in Namibia. In August 2025, the expansion of the Nacala Corridor was also announced, an infrastructure network connecting the deep-water port of Nacala in northern Mozambique with Malawi and Zambia to boost the export of critical minerals from the region.

Many Japanese investments in Africa also involve development aid in various countries. The Ministry of Foreign Affairs' Development Agency participates in these negotiations, although it has recently been forced to backtrack on some initiatives, such as the twinning of four Japanese cities with four others in Nigeria, Tanzania, Ghana and Mozambique, as this was interpreted as encouraging immigration, even leading to demonstrations.

The diversification of suppliers, beyond the pre-eminence of China, also affects pre-assembled technological components, such as semiconductors. In early 2024, the world's leading manufacturer, Taiwanese company TSMC, opened its first overseas production plant in Japan since 2018. In this way, the country, which was once a player in chip production until it began importing them from China, wanted to re-enter this sector with a policy complemented by others to secure essential supply chains.

As a result of this strategy, various international initiatives proposed by Japan were promoted within the framework of its FOIP vision, such as its participation alongside the United States, South Korea and Taiwan in the US-East Asia Working Group on Semiconductor Supply Chain Resilience, known as *Fab 4*, which has been operating since 2023 (Shivakumar, Wessner, & Howell, 2023) .

With regard to the United States, in June 2025, and in relation to the imposition of tariffs by the Trump administration, Japan proposed that the talks include the supply of rare earths, as well as their joint processing and refining in third-country facilities (Ohshima, 2025) .

Another key pillar of the 2010 strategy was to conduct surveys in search of proprietary deposits. Seven years later, in 2017, the first large-scale deep-sea mining project was carried out in hydrothermal vents in Okinawa, and new extraction projects were announced. From early 2026, this will begin on the seabed near Minamitori Island, while other prospecting will focus on sediment layers at depths of more than 5,500 metres in various locations under Japanese sovereignty (Bernasconi, 2025) .

The Arctic: a new area of interest

As a result of this need to diversify the supply of strategic resources, the Arctic is also emerging as a new region of interest for Japan, in line with other powers. Japan was the only Asian country among the original signatories of the Antarctic Treaty in 1959 and the first Asian country to establish a national polar institute, and since 2013 it has been a permanent observer on the Arctic Council. It is thus showing its interest in northern sea routes as an alternative to the congested Strait of Malacca and the conflict-ridden South China Sea. However, this presents a strategic dilemma, as cooperation with China and Russia in this area is essential, and Japan's alignment with Western sanctions against Russia hinders its ability to manoeuvre. Another factor working against Japan is the joint naval exercises conducted by China and Russia in the north, off the coast of the Kuril Islands, whose sovereignty is still disputed by Japan and Russia(*El Grand Continent*, 2024) .

However, as in the case of Australia, Taiwan and Africa in the supply of strategic minerals, Japan is also interested in the projected possibilities offered by the Arctic and is seeking international cooperation with the Nordic countries, Norway, Finland and Canada, when it comes to projecting itself there. After actively contributing to scientific research, Japan is moving towards greater assertiveness in diplomacy in this region this year. Japan currently has research stations in Canada, Iceland and Norway, and Japanese researchers collaborate with scientific centres in the Arctic.

In 2015, Japan's official Arctic policy was published, which also referred to the need for international cooperation, the development of its natural resources and, indicatively, their importance for national security.

Previously, in 2008, Japan's Basic Ocean Policy Plan had been published, updated every five years and with a more strategic vision of Japanese interests in Arctic issues and the evolution of its maritime routes. In 2023, the fourth version of this plan was published, in which Japan assumes its own Arctic identity, coinciding with its interests in the region, and emphasises the importance of its contribution to the Arctic Council and other cooperation frameworks for formulating rules and standards of conduct. It also highlights the need for a safe environment for Japanese shipping companies using Arctic routes

and the participation of its companies in related international forums (Japan Cabinet Office, 2023) .

Once again, Japan's vision for the Arctic is based on the principles of international law and freedom of navigation, aligned, as in the case of the supply of strategic minerals, with the FOIP vision for the Indo-Pacific region (Hataya, 2025) .

Finally, 2025 saw the completion of the Mirai II, a novel research vessel designed for the Arctic and capable of navigating its waters year-round under perennial ice conditions. It will be the first Japanese research icebreaker of this calibre, focusing on the study of meteorology, climate and atmospheric chemistry, as well as changes in Arctic Ocean conditions and navigation in sea ice. Significantly, it will be operated by the Maritime Self-Defence Force, as its Antarctic icebreaker Shirase served as a model (Ingvarsdóttir, 2025) .

Resurgence of Japanese naval power

In line with the growing investment in security to provide Japan with strategic autonomy in the field of defence, the Maritime Self-Defence Force has recently been transitioning from a purely defensive navy — focused on protecting the country's approximately 30,000 kilometres of coastline as Japan is a country historically devoted to the sea, let us not forget—to becoming a projection navy in oceanic waters and deep-se . This projection has been accompanied since 2012 by Abe's project to defend freedom of navigation in the Pacific, embodied in the subsequent FOIP vision. This vision was consolidated into a regional maritime security architecture together with the United States, India and Australia within the framework of the Quadrilateral Security Dialogue or QUAD (Spanish Institute for Strategic Studies, 2024) .

In its *2025 Defence White Paper*, Japan views its environment as a maritime border in constant tension (Ministry of Defence, 2025, p. 21) . In the north with regard to Russia and the Kuril Islands, in the west with regard to China and North Korea, and in the south with regard to the bottleneck of the Strait of Malacca and the South China Sea. In an otherwise volatile international order, it is now clear that Japan is taking a broader approach to its national security strategy, combining diplomatic, economic, technological, intelligence and military dimensions, with a growing emphasis on its naval and maritime

projection, where the Maritime Self-Defence Force has long been carrying out international security missions against piracy, escorting ships in the Horn of Africa and even monitoring the South China Sea, with the destroyer Sazanami participating in patrols around Taiwan in September 2024, alongside Australian and New Zealand ships.

On the other hand, Japan is expanding agreements with allied countries such as Australia, India, the United Kingdom and the Philippines for joint presence and reciprocal access to naval bases, while promoting its own defence industry and increasing spending on the purchase of more sophisticated and longer-range naval equipment, especially from the United States. One example is the launch of the light aircraft carrier Izumo in 2015, but with modifications to allow it to operate with F-35B fighter jets, a symbol of projection, or other projects such as the incorporation of some 400 Tomahawk missiles into its destroyers or the development of New FFM-class frigates, the modernised successor to the Mogami, which has greater displacement capacity and the potential to carry vertical launch systems (The Military Balance, 2025, págs. 215-217, 262-267).

Meanwhile, the debate in the country is no longer focused on the need for this naval projection beyond self-defence, but rather on the need for Japan to join the ranks of the major military powers by investing, for example, on unmanned devices or the construction of submarines equipped with long-range missiles and the ability to remain submerged for extended periods of time, for which, on the other hand, new batteries or fuels are needed, without disregarding nuclear propulsion (Kosuke, 2025) .

Conclusion: Japan is sailing towards autonomy in an expanded Indo-Pacific

Japan offers a model for other countries to follow in the quest for autonomy in the supply of strategic and energy resources, seeking to move away from dependence on third powers in these sectors, specifically China. It is a slow process that requires investment, diplomacy and projection to be present in critical locations. In fact, for Japan, this path began 15 years ago when its economy was seriously threatened by China's suspension of imports of minerals that are strategic for Japanese industry. The slow pace of progress towards autonomy, the search for its own resources, collaboration with other nations and security on maritime routes vital for supply is evidenced by the fact that, while Japan's

dependence on Chinese rare earths was 90% in 2010, today it is 60%, which is still quite high.

Japan complements its defence concept by focusing on economic security as a pillar of its subsistence, through specific agencies and laws to protect supply chains and ensure the arrival of critical resources.

This framework is directly linked to the naval dimension of this global strategy, where the maritime-naval component appears as the axis of its projection around two interacting factors: on the one hand, the protection of supply chains in the west-east axis of the Indo-Pacific; and, on the other, ensuring its own increasingly important interests in other places such as Australia, Africa or, in the medium term, the Arctic (Ward & Koshino, 2025, pp. 103-120) .

This means that the Indo-Pacific, as a maritime framework within the FOIP concept formulated by Shinzo Abe in 2016, will remain in essence a key maritime framework for Japan, a space dedicated to maintaining the openness and stability of sea routes through international law, freedom of navigation and international collaboration.

However, two variables stand out that will require modifications to the FOIP. First, the unstable international order, accentuated since the arrival of the second Trump administration in the United States, which even before taking office in January 2025 was generating reluctance and mistrust in Tokyo. This situation prompted the first signs of Japan's search for greater strategic autonomy in security matters, concerned about the uncertain prospects for the traditional US umbrella and, above all, forcing the country to strengthen its capabilities in the face of the growing assertiveness of China and Russia, whose actions threaten Japanese interests and even, in some naval and air incidents, its own sovereignty. The search for allies beyond the United States also responds to this approach of strategic autonomy (Fernández Aparicio, 2024) .

Secondly, the country's interests have moved beyond the maritime borders contemplated in the FOIP, which broadly speaking would run from the Arabian Sea to the South China Sea, to include Australia, southern Africa and, as we saw above, even the Arctic, regions where Japan can obtain strategic resources and critical minerals essential to its independence from China. New maritime routes require continuity and security, which of course translates into a naval force capable of meeting such demands, with capabilities

beyond self-defence. These capabilities must also protect the new rare earth mineral deposits in Japanese territory, most of which, not coincidentally, are located in open waters under Japan's sovereignty.

Japan presents itself as a guarantor of the liberal maritime order in the Indo-Pacific, yes, with its participation in joint exercises with allied countries such as India, the United Kingdom and other European countries, but it also presents itself as a model of original initiative against China's aggressive expansion and economic coercion. The resources-Arctic-naval power triangle reveals Japan's attempt to escape its traditional energy vulnerability, as its maritime projection is an instrument that links energy security, route protection and new diplomacy.

However, Japan continues to depend significantly on inputs from China, which maintains overwhelming control over all stages of the supply chain: mining, separation, refining and magnet production. The geopolitical tensions of recent months with the United States have not helped reduce Chinese exports, although a satisfactory agreement has been negotiated in this regard for both parties: the Americans and the Japanese(*Le Grand Continent*, 2023) .

With the United States, the debate shifts to other issues such as the relevance of the US military presence in the country, which stems from agreements dating back to the end of the Second World War, its financing and the impact of domestic industrial integration. Japan, for its part, aims to progressively strengthen its naval sector in order to reduce its dependence on imports of equipment, most of which is of US origin.

China itself sees these frictions between the United States and Japan as a potential advantage and, rather than imposing abrupt restrictions, is threatening to adjust export flows to maintain its market dominance, while trying to ease diplomatic pressure on Tokyo. It should not be forgotten that Japan's naval modernisation is also a response to the dramatic increase in Chinese naval activity in the region — also in the midst of take-off and modernisation — as well as ballistic and submarine threats from China, but also from North Korea in the case of missile launches, in addition to incursions by Russian aircraft and ships into or near Japanese sovereign islands.

Finally, although the debate has not yet reached the forefront of Japanese politics, there are still possible constitutional and legal limits to initiatives such as the provision of long-

range missiles, the conversion of light aircraft carriers, and the future capabilities of destroyers. Another obstacle is that naval projection requires more personnel, while Japan has a structural demographic problem, with an ageing population and a negative growth rate, resulting in a shortage of crews. Perhaps for this reason, many designs are focusing on automation, thus reducing the need for human crews on vessels securing routes in an expanded Indo-Pacific for the country.

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