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# As Trump returns, will Japan be able to weather the storm?

Then-U.S. President Donald Trump speaks during a news conference at Akasaka Palace in Tokyo in May 2019. | BLOOMBERG

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A perfect storm is brewing for the U.S.-Japan relationship with Donald Trump's return to the White House this week.

When Trump is sworn in on Monday in Washington, he is widely expected to bring his transactional view of alliances to the Oval Office once again.

For Japan, this could mean anything from a louder demand that Tokyo cough up more cash for hosting U.S. troops to a renewed push for it to further jack up defense spending.

Or it could mean a return to threats of onerous tariffs on Japanese steel, aluminum and automobiles.

Or it could mean a combination of all three.

Trump's triumphant return will also come as Prime Minister Shigeru Ishiba, the unpopular head of a minority government, grapples with how to win over the mercurial incoming U.S. president.

The only certainty at this point, experts say, is that Trump will bring uncertainty.

Nevertheless, Tokyo may be surprisingly more suited to weather this storm than it was during Trump's first stint.

As the allies mark the 80th anniversary of World War II's end this year — and coincidentally the signing of the U.S.-Japan Security Treaty in Washington exactly 65 years ago Sunday — Trump will confront an alliance very different from the one he dealt with during his first term.

The two countries have welcomed "a new era" in their bilateral alliance, strengthening defense cooperation to a level hitherto unseen, largely in response to China's growing military assertiveness. This cooperation includes plans that will see an upgrade to the U.S. military's command in Japan and the establishment of a Self-Defense Forces permanent joint military headquarters, with both moves helping streamline interoperability in the event of a crisis.

These historic shifts reflect a deeper military integration, positioning the alliance as a central pillar of Washington's Indo-Pacific strategy — a reality that will at least partially ease concerns in Tokyo.

"The U.S. alliance managers should be broadly content with the direction of travel in Japanese security cooperation with the U.S.," said Christopher Hughes, a professor of international politics and Japanese studies at the University of Warwick in England. "Trump himself is unlikely to have the attention span for the details."

Trump may also find it more difficult than before to explicitly call out Tokyo for alleged shortcomings on defense spending, as he did with NATO countries during his presidential campaign.

Japan has broken from decades of precedent with a plan to spend 2% of gross domestic product on defense by fiscal 2027 — just one signal that Tokyo is now more ready than ever to shed some of the postwar constraints on its military.

Even so, Japan's defense budget and cost-sharing for hosting U.S. troops are likely to remain "headline issues" for Trump, Hughes said.

"I would expect him to push Japan to speed up on reaching 2% of GDP on defense, at least, and then to go further," he said.

Self-Defense Forces members stand in formation at the Ground Self-Defense Force's Camp Asaka straddling Tokyo and Saitama Prefecture last November during a troop review on the 70th anniversary of the SDF's founding. | POOL / VIA REUTERS

In a sign that the issue may be on Trump's mind, Elbridge Colby, Trump's pick to be the Pentagon's undersecretary of defense for policy — a key post that provides advice and support on strategy, planning and management of international alliances to the defense secretary — has repeatedly asserted that Japan must quickly boost defense spending to around 3% of GDP.

But some analysts say Trump's other priorities may mean this is less of an urgent issue for his administration.

“Japan's strategic value to the United States is, obviously, considerable,” said Sheila Smith, a Japan expert at the Council on Foreign Relations. “I do not see the push to get allies, including Japan, to spend 3% or 4% of GDP on their defenses as a viable goal for the immediate future, especially given the incoming Trump administration's approach to trade, but the bar will continue to move under this administration and thus, inevitably under future administrations.”

Out of the gates, Trump is expected to focus on trade issues, especially when it comes to China, the United States’ top geopolitical rival.

In late November, Trump announced plans to impose an additional 10% tariff on Chinese goods and 25% tariffs on imports from Mexico and Canada, justifying the move as retaliation against illegal immigration and an influx of drugs.

Those moves would likely impact Japanese companies operating in those countries, forcing them to adjust supply chains to reduce collateral damage to Japan Inc., Akihisa Nagashima, Ishiba’s national security adviser, said last month after discussions on tariffs with members of Trump’s team during a visit to the U.S.

Japan could also be hit directly. During the presidential campaign, Trump threatened global tariffs of up to 20%. During his first term, the U.S. president threatened 25% tariffs on Japan’s automobile sector, though Tokyo avoided such measures by agreeing to a new bilateral trade deal in 2019.

It may do so again under Trump 2.0. Several of his key advisers have suggested that tariff levels may be influenced by the quality and depth of countries’ economic and security relationships with the U.S. — something that could preclude Japan from being hit hard.

While Trump has criticized Japan’s trade surplus with the U.S., Japanese officials have said they will be quick to tout that Tokyo remains a key economic partner for Washington. Japan was the largest source of foreign direct investment in the U.S. for the fifth consecutive year in 2023, with nearly $800 billion.

"Japan's status as the leading U.S. investor over the past five years ... demonstrates our contributions. I will thoroughly explain and ensure understanding of these efforts," Foreign Minister Takeshi Iwaya told a news conference Friday. Iwaya will be the first top

Japanese diplomat to attend a presidential inauguration when he visits Washington this week.

Iwaya could outline this stance at a possible meeting with his presumptive counterpart, Sen. Marco Rubio, during the visit. Trump has nominated Rubio to be secretary of state , and his confirmation by the Senate could come as early as Monday.

The exterior of a blast furnace building at Nippon Steel's East Nippon Works Kashima Area in Kashima, Ibaraki Prefecture | AFP-JIJI

But fault lines elsewhere in the allies' economic relationship have also emerged following President Joe Biden's decision to block Nippon Steel's proposed $14.9 billion purchase of U.S. Steel over national security concerns.

Trump had also pushed for the deal to be blocked, saying that he is "totally against" the American steelmaker "being bought by a foreign company," while pledging to use tax incentives and tariffs to make the American steelmaker "Strong and Great Again."

Experts say that the economic costs associated with changes in U.S. trade policy — including what some have called a "perception that allies are being treated as adversaries" — will mean that Japan's own interests will need to be voiced more forcefully than during Trump's first stint.

The question is: Will Ishiba be up for the job?

Prime Minister Shigeru Ishiba attends a news conference at the Presidential Palace in Bogor, Indonesia, on Jan. 11. | REUTERS

Much of Tokyo's success in interacting with Trump will hinge on the prime minister's ability to communicate Japan's importance while presenting himself as likely to be around long enough for Trump to care about.

Ishiba has battled persistently low approval ratings since taking up his post in October, and was dealt another blow in elections later that month that saw his Liberal Democratic Party-led coalition lose its majority in the Lower House for the first time in 15 years.

Forging personal ties will also be crucial for Ishiba, who is known for his logical — if bookish — communication skills.

Although leader-to-leader ties can be overstated — as some experts believe Trump's relationship with former Prime Minister Shinzo Abe has been — "the ability to connect personally with Trump will matter," said Shihoko Goto, director of the Indo-Pacific Program at the Wilson Center think tank in Washington.

Abe, known as a "Trump whisperer," cultivated his bond with Trump on the golf links, an effort that prompted former U.S. national security adviser John Bolton writing in his 2020 memoir that he had the "best personal relationship (with Trump) among world leaders."

"Ishiba, by contrast, appears weak at home and ill at ease in forging personal ties with foreign leaders," said Hughes, noting the prime minister's "preference for calm logic to try

and win people over" — an approach unlikely to go over smoothly with the famously impatient Trump.

Indeed, if Trump perceives his Japanese counterpart as unhelpful toward whatever ends he is seeking, he "may try to railroad or even destabilize him domestically," Hughes said.

In this case, Hughes added, "Ishiba might want to learn to play golf quite quickly."

Then-U.S. President Donald Trump and then-Prime Minister Shinzo Abe wave during a visit to Mobara Country Club in Mobara, Chiba Prefecture, in May 2019. | POOL / VIA BLOOMBERG

**KEYWORDS**

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