



SPECIAL REPORT · INDO-PACIFIC / NUCLEAR DETERRENCE

Extended deterrence under pressure: Japan, South Korea and the debate over nuclear autonomy

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Executive summary

The credibility of U.S. extended deterrence in Northeast Asia is under unprecedented scrutiny. Japan and South Korea face a convergent threat: an expanding North Korean nuclear arsenal, a modernising Chinese nuclear force, and a U.S. security guarantee that allies increasingly question. In Seoul, the nuclear latency debate has moved from academic circles into mainstream defence policy; in Tokyo, the discussion remains quieter but is structurally similar. For international actors, the operating environment in Northeast Asia is shifting from a stable deterrence framework to one where hedging, latency and potential breakout scenarios must be priced into business continuity, travel and investment decisions.

What matters now

- **The U.S. nuclear umbrella is being stress-tested.** North Korea's 2023–2026 missile testing cadence (Hwasong-17, -18, -19 ICBMs; solid-fuel IRBMs; tactical nuclear-capable KN-23/24/25) and the 2023 tactical nuclear doctrine law have lowered the threshold for nuclear use. Allies ask whether Washington would trade Seattle for Seoul or San Francisco for Tokyo.
- **South Korea's nuclear latency is now a declared policy option.** The Yoon administration's 2023 statement that "if the problem becomes more serious, we may have to consider acquiring nuclear weapons or requesting redeployment of U.S. tactical nukes" broke a decades-old taboo. Public support for an indigenous arsenal consistently polls 60–70%.
- **Japan's latency is technical, not political.** Japan holds 45+ tonnes of separated plutonium, a mature reprocessing cycle (Rokkasho), and the Epsilon/H-IIA/III launch vehicle family. Breakout time is measured in months, not years. The 2022 National Security Strategy's "counterstrike capability" (retaliatory strike) is the conventional mirror of nuclear latency.
- **China's nuclear expansion changes the regional calculus.** The Pentagon's 2024 China Military Power Report estimates 500+ operational warheads (doubled since 2020), on track for 1,000+ by 2030. DF-26 IRBMs, DF-41 ICBMs, JL-3 SLBMs and hypersonic glide vehicles (DF-ZF) complicate U.S. extended deterrence by adding a second nuclear peer to the theatre.
- **Allied burden-sharing demands are rising.** The 2023 Washington Declaration (U.S.–ROK Nuclear Consultative Group) and 2024 U.S.–Japan Extended Deterrence Dialogue institutionalise consultation but do not close the credibility gap. Allies want operational integration; Washington offers declaratory reassurance.

Current operating picture

North Korea: quantitative and qualitative leap

- **Warhead stockpile:** 40–60 assembled warheads (SIPRI 2024); fissile material for 70–90 (IAEA/US intelligence).
- **Delivery systems:** Hwasong-18 (solid ICBM, 15,000+ km), Hwasong-17 (liquid ICBM), Hwasong-12 (IRBM, Guam range), KN-23/24/25 (SRBM, tactical nuclear capable), Pukguksong-3/4/5 (SLBM/SLCM).
- **Doctrine:** 2023 law codifies pre-emptive nuclear use if "command and control" is threatened; tactical nuclear units (8th Fire Brigade, 17th Missile Brigade) exercise regularly.
- **Testing tempo:** 2023: 30+ launches; 2024: 20+ through October; 2025: sustained cadence including solid-fuel ICBM and MaRV demonstrations.

South Korea: the latency debate goes mainstream

- **Official posture:** NPT member, 1992 Joint Declaration on Denuclearisation (void de facto). 2023 Washington Declaration: NCG established, SSBN port visits, strategic asset deployments, tabletop exercises.
- **Domestic drivers:** 2023–2026 polls (Chicago Council, Asan Institute, Gallup Korea): 60–71% favour own nukes; 55% accept U.S. troop reduction if nukes acquired.
- **Technical capacity:** 24 reactors (25 GW), 10,000+ kg heavy water (Wolsong CANDU), pyroprocessing R&D (DAEFI), KSLV-II (Nuri) launch vehicle — all dual-use.
- **Breakout estimate:** 6–12 months for a crude device; 18–24 months for deliverable arsenal (Sagan, Tobey, 2023 CSIS; KIDA internal assessments).

Japan: technical latency, political constraint

- **Fissile material:** 45.5 t separated plutonium (9.3 t domestic, 36.2 t abroad — UK/France), enough for ~6,000 warheads.
- **Fuel cycle:** Rokkasho reprocessing (800 tHM/yr, commissioning 2024+), MOX fabrication (J-MOX, 2025), fast reactor (JOYO/MONJU legacy).
- **Delivery proxy:** Epsilon (solid, 1.5 t LEO), H-IIA/H3 (liquid, 4–8 t GTO). M-V/H-II heritage gives ICBM-range potential.
- **Legal/political:** Three Non-Nuclear Principles (1967), Atomic Energy Basic Act (peaceful use only), NPT Article II. Constitutional reinterpretation (2014 collective self-defence) shows flexibility but nuclear breakout remains a "last resort" taboo.
- **Breakout estimate:** 3–6 months for device; 12–18 months for missile-deliverable force (NTI, 2023; Japan Atomic Energy Commission internal).

China: the second peer

- **Force growth:** 2020: ~200; 2024: ~500; 2030: ~1,000+ (DoD 2024). New silo fields (Yumen, Hami, Hanggin Banner: 300+ silos).
- **Triad maturation:** DF-41 (MIRV, road-mobile), JL-3 (Type 094/096 SSBN), H-20 (stealth bomber, IOC late 2020s), DF-ZF (HGV, operational).
- **Theatre impact:** DF-26 (3,500 km, "Guam Express") and DF-17 (HGV) hold U.S. bases in Japan, Guam, Hawaii at risk. U.S. homeland deterrence now competes with theatre extended deterrence for limited assets.

Key risk mechanisms

1. Credibility gap in extended deterrence

The core mechanism is the "decoupling fear": allies doubt U.S. willingness to absorb a nuclear strike on the homeland to defend an ally. North Korea's ICBM capability (demonstrated 2017, matured 2023+) makes this tangible. China's ICBM/HGV expansion deepens it. The U.S. response (NCG, bomber deployments, SSBN port calls) is declaratory and episodic, not structural.

Operational consequence: Allies pursue hedging — conventional counterstrike (ROK "Kill Chain"/KMPR, Japan "counterstrike capability"), missile defence (THAAD, PAC-3 MSE, SM-3 Block IIA, Aegis Ashore Japan), and latent nuclear capacity.

2. Nuclear latency as strategic signalling

South Korea's public debate and Japan's plutonium stockpile function as latent deterrents. They signal to Beijing and Pyongyang that breakout is feasible, and to Washington that reassurance must be credible. The risk is inadvertent escalation: a North Korean or Chinese perception that breakout is imminent could trigger pre-emption.

3. Arms-racing dynamics in conventional-nuclear entanglement

U.S. conventional prompt global strike, ROK/Japan counterstrike, and Chinese/Russian hypersonics blur the conventional-nuclear threshold. A conventional strike on a dual-use C2 node could be misread as nuclear decapitation. The 2022–2024 missile tests by all sides rehearsed this ambiguity.

4. Non-proliferation regime erosion

If South Korea or Japan acquires nuclear weapons, the NPT faces its greatest challenge since the 1960s. Taiwan, Saudi Arabia, Turkey, Poland and others have latent capacity and similar security anxieties. A cascade would fundamentally alter the Indo-Pacific operating environment for all international actors.

5. Crisis instability and launch-under-warning pressures

North Korea's "use it or lose it" doctrine (small arsenal, vulnerable launchers) and China's shift to launch-on-warning (early warning satellites, 2021+) compress decision time. U.S. allies lack independent strategic ISR; reliance on U.S. data creates a single point of failure.

Early warning indicators

Indicator	Threshold for escalation	Source
ROK official statement on nuclear armament / NPT withdrawal	Any cabinet-level endorsement	Blue House, MND, Yonhap
Japan plutonium utilisation policy change	Fast reactor restart, MOX expansion beyond current plan	JAEC, METI, Nikkei
U.S. tactical nuclear redeployment to Korea/Japan	Formal announcement or basing agreement	DoD, State Dept., NK News
North Korea atmospheric test / MIRV demonstration	First such event since 2017	CTBTO, USFK, 38 North
China nuclear alert level change / silo loading	Satellite imagery, intelligence leaks	CSIS, IISS, commercial SAT
U.S. extended deterrence dialogue cancellation or delay	Missed NCG/EDD cycle	White House, Pentagon readouts
Allied public opinion shift >10 pts in 6 months	Polls (Asan, Chicago Council, NHK, Yomiuri)	Polling institutes

Implications for organisations

Companies with Indo-Pacific exposure

- **Supply chain:** Semiconductor (TSMC, Samsung, SK hynix), automotive, shipbuilding, chemicals — all concentrated in missile range. Map tier-1/2/3 suppliers to nuclear target sets (ports, airfields, C2, power grid).
- **Insurance:** War/nuclear exclusions in property, cargo, D&O, cyber policies. Parametric triggers for "nuclear event in theatre" rarely exist; negotiate bespoke endorsements.
- **Investment:** Greenfield/brownfield CAPEX in Korea/Japan should scenario-model sanctions cascades (e.g., ROK nuclear test → U.S. sanctions under Glenn Amendment → financial freeze).

Travellers and expatriate staff

- **Evacuation planning:** Commercial air will cease immediately in a nuclear crisis. Charter/airbridge options must be pre-contracted. Embassy wardens lists current.
- **Communications:** Satellite messengers (Garmin inReach, Iridium GO), eSIM with non-local roaming. Local networks (SKT, KT, LG U+, NTT, KDDI, SoftBank) will be congested or censored.
- **Medical:** Potassium iodide stockpiles, blast trauma kits, designated hardened shelters (subway stations, underground malls in Seoul/Tokyo).

NGOs and diplomatic missions

- **Humanitarian access:** Nuclear use triggers mandatory evacuation of UN/INGO staff under security phase V. Pre-positioned kits (IAEA/WHO radiation kits) in Seoul, Tokyo, Busan, Fukuoka.
- **Consular surge:** Dual-national Koreans/Japanese in China/Russia/North Korea — exit routes via land (Dandong, Vladivostok) or sea (Fukuoka–Busan ferry) must be rehearsed.

Recommended actions

Within 72 hours

- **Scenario register:** Add "ROK/Japan nuclear breakout" and "theatre nuclear use (DPRK/China)" to enterprise risk register. Assign owners.
- **Insurance audit:** Request policy wording review for nuclear/war exclusions, parametric triggers, and cancellation clauses. Engage broker for bespoke endorsements.
- **Travel policy update:** Require pre-travel registration for Korea/Japan/China. Embed evacuation trigger matrix (commercial → charter → military airbridge).

Within seven days

- **Supply chain mapping:** Identify single-source dependencies in Korea/Japan/China/Taiwan. Qualify alternate sources in Southeast Asia, India, North America, EU.
- **Communications resilience:** Procure satellite messengers for all expatriate staff. Test quarterly.
- **Consular coordination:** Register staff with embassy wardens. Verify dual-national status and exit visa requirements.

Within thirty days

- **Tabletop exercise:** Run "theatre nuclear crisis" scenario with legal, security, HR, comms, finance, operations. Test decision authority, communication trees, financial authorities.
 - **Contractual force majeure:** Review supplier/customer contracts for nuclear/war force majeure clauses. Standardise language to include "nuclear event in theatre of operations."
 - **Insurance programme renewal:** Build nuclear scenario into 2025–2026 renewal submissions. Engage Lloyd's/Paris/Bermuda markets for parametric capacity.
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Method note

This report is based on open-source material reviewed up to 23 June 2026 and analytical assessment by SF Custos Global. It does not replace legal, insurance, sanctions, medical or country-specific professional advice.