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The Middle Corridor: A Useful Option, Not a Replacement

Geoeconomic concerns have made routes that avoid Russia a priority. The Middle Corridor - the land route connecting China to Europe while bypassing Russia - is the main land example. The history of energy transit shows both why such projects attract support and why many struggle. The recent interest in the Middle Corridor is due to the recent growth in traffic; freight has grown five- to tenfold since 2021. But this is from a very small base. Russia-transit rail still carries about 90% of China–EU rail freight, and sea carries the great majority of the total trade. Because of physical and institutional limits, the corridor will remain a small share of total China–EU trade, even if its role were to continue to grow. It deserves targeted support as insurance against disruption, and to increase connectivity and development in the South Caucasus and Central Asian region. But it is important to keep in perspective the role it can play in aggregate trade between China and Europe. More important changes are more likely to come at sea.



Since Russia's full-scale invasion of Ukraine in 2022, the so-called Middle Corridor has moved from the margins of transport policy to the center of attention. The route runs from China through Kazakhstan, across the Caspian Sea to Azerbaijan, and on through Georgia to Turkey and Europe; see Figure 1. Sometimes other alternatives are included, such as routes through Uzbekistan and Turkmenistan, and also through Armenia, but the common point is routes that avoid Russia. The EU has pledged billions of euros for connectivity with Central Asia, the World Bank has backed an upgrade of Kazakhstan's railways, China has begun to engage with the route, and freight has grown from roughly 0.5–0.84 million tons in 2021 to about 4.5–5 million tons in 2024–25 (the exact figures vary across sources and also depend on the metrics used, but the bottom line remains: the growth has been 5-10 times the volume since 2021).

Recent events have brought increased attention to the route and its importance. Poland's closure of its border with Belarus in September 2025 briefly stopped most China–EU rail traffic, and attacks in

the Red Sea and disruptions around Hormuz have raised doubts about the sea lanes. Also, recent events around Georgian harbors, such as the delay of the **Anaklia deep-sea port** can be seen in light of the Middle Corridor discussion. It is tempting to read these developments as a new trade route displacing the old ones. This brief argues for a more cautious reading.

A geoeconomic world: lessons from energy transit

The interest in the Middle Corridor is an example of a broader shift. Policy makers and academics alike are trying to navigate a new world order. The "flat" world of just-in-time global production and transport chains is giving way to a more complicated one in which resources, production capacity and geography can all be "weaponized". Interest in geoeconomics, the use of economic means for strategic ends, has grown accordingly (Hirschman, 1945; Farrell and Newman, 2019; Aiyar et al., 2023a, 2023b; Mohr and Trebesch, 2025; Snower, 2026a, 2026b).

Figure 1. The Middle Corridor



Source: <https://middlecorridor.com/en/route>



For those who study Eastern Europe and Russia, and energy and resource economics in the region in particular, this perspective is not entirely new. Control over chokepoints in transit routes has long been central to strategic concerns, and energy transit offers a long record of how geography becomes leverage. Three lessons stand out.

Transit creates rents and exposure on both sides.

Russia has repeatedly used gas and oil transit as a bargaining chip and to influence neighboring states. Just to give a few examples from the past decades: gas flows through Ukraine were stopped for a few days in January 2006 and for almost two weeks in January 2009, affecting more than 20 countries (Bloomberg, 2025); in 2006 Russia also shut the oil pipeline to Lithuania's Mažeikių refinery (UNIAN, 2008); disputes with Belarus in 2004, 2007 and 2010 interrupted transit twice, gas in 2004 and oil in 2007 (OIES, 2010). Moscow said it was moving neighbors from subsidized to market prices, while many European politicians saw political pressure (RFE/RL, 2010). Leverage also ran the other way. Ukraine declined to renew the gas transit contract, which expired on 1 January 2025 after carrying 148 bcm in five years and paying Ukraine about \$6.2 billion in fees (GasUA, 2025). Incidents such as these created a concern for European energy security, leading to important research attempting to quantify this (Le Coq and Paltseva, 2009).

Those who depend on transit try to bypass it.

Russia's answer to its disputes with transit states was to propose, and later build, pipelines that avoid them, such as Nord Stream under the Baltic

and TurkStream across the Black Sea (UNIAN, 2008; Bloomberg, 2025). The search for routes that avoided Russia followed the same logic, including the routes that overlap with the Middle Corridor, such as the Nabucco pipeline.

Political ambition does not replace a commercial anchor.

The Nabucco pipeline, meant to bring Caspian gas to Europe without crossing Russia, was abandoned in June 2013 when the Shah Deniz II consortium chose the shorter and cheaper Trans-Adriatic Pipeline (Elcano, 2013). The chosen pipeline had lower capacity than Nabucco would have had, and EU member states were divided, with several signing bilateral deals with Russia on the rival South Stream project (ECFR, 2014). The Southern Gas Corridor was built, but in a smaller form than its political backers had hoped.

Each lesson has a counterpart in the Middle Corridor: transit states that gain rents and leverage, users with options and a rival with an interest in complicating them, and a gap between political support and commercial viability.

What to make of the interest in the Middle Corridor

Before 2022 the northern route through Russia and Belarus carried up to 86% of China–EU rail freight, while the Middle Corridor carried less than 1%. In 2025 about 90% of China–EU rail freight still crossed into the EU via Belarus and Poland, and the Middle Corridor's capacity is only about 5–6% of the northern route's (see, e.g. [Atlantic Council, 2025](#)). Seen in this light, the recent interest in the Middle Corridor has three drivers.



- **Sanctions and political risk.** Russia's invasion made routing through Russia politically undesirable for European governments, insurers and shippers, even though transit trade itself was not sanctioned. Central Asian states gained a reason to build options that do not depend on Moscow.
- **Chokepoint shocks.** Red Sea attacks from late 2023 and the disruption around Hormuz in 2026 strengthened the case for a land route that touches neither chokepoint.
- **Money and diplomacy.** The EU's Global Gateway pledges (about €10 billion in 2024 and a further €12 billion at the 2025 Samarkand summit, of which €3 billion is for the Middle Corridor) and a 2026 World Bank guarantee of \$846 million for Kazakhstan's rail upgrade turned political interest into financing. China, once hesitant, has engaged while continuing to use the northern route.

As in the energy case, the route also redistributes leverage. Kazakhstan, Azerbaijan, Georgia and Türkiye become transit states with rents to gain and pressures to manage, and Armenia may join them. The policy question is how much of the old geoeconomics the new route can actually change. The rest of this brief takes up that question: what has happened so far, how large the corridor is in proportion to the alternatives, what limits its growth, and what follows for policy.

What has happened

The corridor is growing steadily, and two episodes, the Polish border closure and the Georgian port saga, show both its value and its limits.

Current volumes

Container traffic on the route totalled 53,574 TEU in January–August 2026, up 11% from 48,326 TEU a year earlier, carried on 265 container block trains. About 80% moved westward, and only 20% back to the east (Times of Central Asia, 2026; Report.az, 2026, citing Azerbaijan Railways' ADY Express). Industry sources cited in October 2025 put monthly capacity at under 10,000 TEU, against demand of about 40,000 TEU (Times of Central Asia, 2025).

The Polish border closure, September 2025

Poland closed its border with Belarus on 12 September 2025, after Russian–Belarusian exercises and a drone incursion, and reopened it two weeks later. About 90% of China–EU rail freight passes through the crossing at Małaszewicze, so the closure stopped most of the flow, with more than 130 trains stranded. China's response was mainly diplomatic: Foreign Minister Wang Yi went to Warsaw and Politburo member Li Xi to Minsk (Times of Central Asia, 2025). Some forwarders offered the southern route as a contingency, and a Chinese carrier sent a container ship through the Arctic that month, but the alternatives absorbed only single-digit percentages of the flow (GetTransport, 2026). The disruption came from a transit state acting on security grounds, a reminder that transit leverage is not Russia's alone.

Georgia and new branches

Georgia is the gateway to Europe and the most visible bottleneck. The Anaklia deep-sea port has been delayed by a decade of political dispute. In July 2026, Georgia announced that its Chinese-led



Table 1. Relative scale of routes between China and the EU

Route	Rough scale	Note
Sea (all China–EU)	Over 90% of volume	Estimate; the default mode for bulk and most containers
Rail via Belarus and Poland (Northern route)	About €25 bln in 2024, 3.7% of EU–China trade by value	About 90% of China–EU trains cross at Małaszewicze
Rail via the Middle Corridor	About 54,000 TEU in Jan–Aug 2026; 4.5–5 mln tons in 2025 (all cargo types)	A minor share even within rail

Source: Northern route figures come from Asia Times, and Middle Corridor figures come from Times of Central Asia, 2026; the sea share is approximate.

partner had exited, with first operations now targeted for 2029 and no confirmed operator (OC Media, 2026). Two additions would widen the corridor: the US-brokered TRIPP route through Armenia, which bypasses Georgia and could open around 2028, and a southern entry point via Uzbekistan and Turkmenistan. Both add redundancy rather than a different order of magnitude.

Keeping proportions

Even spectacular growth would leave the Middle Corridor a small share of China–EU trade, because the routes it competes with start from a vastly larger base, see Table 1.

Three points follow.

- Russia transit is still the main land route.** Rail through Belarus has not been legally blocked and remains the cheapest, fastest and highest-capacity option. Volumes dipped in 2025, partly because of the Polish closure and partly because sea freight regained price competitiveness (Upply, 2026), not because traffic moved south.
- Fast growth from a small base is compatible with a small share.** If the Middle

Corridor reached one-third of the northern route's current value, it would be about 1% of EU–China trade, and matching the northern route would be about 3.7%. Sea would still carry the great majority.

- Rail suits particular cargo.** High-value, time-sensitive goods and e-commerce, not bulk, which limits how much can shift to land.

Why the corridor will not scale into a replacement

The binding constraints are physical, financial, and institutional, and none can be removed quickly.

- Capacity and cost.** Monthly capacity is under 10,000 TEU, and the World Bank estimates that upgrades will cost \$27–29 billion over 15 years (Times of Central Asia. 2025).
- Multiple handovers.** Cargo changes mode and jurisdiction several times, and each handover adds delay and risk. Border and customs congestion is common, including on the Chinese–Kazakh border.
- Georgian ports.** Until a deep-water port operates, the western sea leg cannot use the largest Black Sea vessels.



- **Directional imbalance.** About 80% of container traffic runs westward, while return trips on the China–Europe rail network as a whole now match outbound trips (GetTransport, 2026). That weakens the corridor's commercial case without subsidies.

The bigger picture: sea routes and the Arctic

The larger uncertainty for China–EU trade lies at sea, where the choice between Suez, the Cape and an Arctic lane will matter far more than anything on the Caspian. After the Red Sea attacks the Cape became the default for many carriers, and prices eased once supply chains adjusted (Upply, 2026).

The Northern Sea Route is the most talked-about new option. In summer 2026 Sea Legend launched what it calls the first scheduled seasonal container service between China and northern Europe, with eight roughly weekly sailings and a targeted transit of 20–22 days, about 15 days faster than Suez on a Shanghai–Rotterdam voyage (Cyprus Mail, 2026; Arctic Today, 2026).

The evidence so far supports reading it as a growing seasonal complement, not yet a replacement for southern lanes. Announced container capacity this season is about 20,000 TEU, small beside Asia–Europe flows of many millions of TEU (approximate), and the season runs only from roughly July to October. The route also follows Russia's coast, requires Rosatom (Russian State Atomic Energy Corporation) permits, and in 2026 relies partly on Russian nuclear icebreakers (Port de Barcelona, 2026), so it is not a way around Russian influence. If global warming and investment continue, the Arctic could matter far

more in the 2030s, which is another reason to keep the Middle Corridor in proportion.

Policy implications

The Middle Corridor deserves targeted support as insurance against disruption, but policy should not assume that it can replace routes through Russia or the sea.

1. **Frame it as resilience, not replacement.** The 2025 episode showed that the northern route has a single point of failure and that the alternatives absorb only a small fraction of the flow. The goal is an alternative good enough to cushion a shock.
2. **Fund the binding bottlenecks first, and insist on a commercial anchor.** Border and customs procedures, Caspian and Georgian port capacity and rail throughput are likely to offer the best returns. Nabucco and Anaklia are warnings against large, politically driven projects without a committed supplier or operator.
3. **Plan for transit-state risk on every route.** The energy record shows that leverage over transit runs in several directions, and the Polish closure shows that it is not Russia's alone. Contingency plans for the northern route, and spreading risk across several transit states, matter more than hoping the Middle Corridor can absorb a closure.
4. **Be aware of the backhaul problem.** The corridor's economics also depend on European and Turkish cargo going east. At current levels the lower west to east demand for freight capacity increases cost for this route.
5. **Build a common evidence base.** Operators should agree consistent statistics, in tons and TEU, with shared definitions.



6. **Keep the maritime picture in view.** Red Sea security, Suez recovery and Arctic shipping will shape China–EU trade far more than any land corridor in the foreseeable future.

Notes on data and sources

The proportions in this brief are robust to the uncertainty in the data, but individual figures should be quoted with care.

- **Units and baselines.** Tons include bulk, while TEU counts containers only. Sources put 2021 freight at roughly 0.5–0.84 million tons, so the rise to 4.5–5 million is five- to tenfold.
- **Container volumes.** The ADY Express count (53,574 TEU in January–August 2026, about 80,000 annualised) is lower than the 130,000–300,000 TEU a year found in some commercial datasets that define the route more broadly. The conclusion holds under either.
- **Train counts.** The 265 Middle Corridor block trains in January–August 2026 (about 400 annualised) compare with 20,022 China–Europe train trips in 2025 on all routes, roughly 2%, though definitions differ.

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