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A safer alternative: growing interest in the Middle Corridor in Central Asia

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According to data from Kazakhstan's Ministry of Transport, over the past seven years the volume of cargo transported through the country via the Trans-Caspian International Transport Route (TITR), also known as the Middle Corridor, has increased more than fivefold, reaching over 4.5 million tonnes annually. The route runs from China through Central Asia, the Caspian Sea, the South Caucasus, and the Black Sea or Turkey to Europe. It serves as an alternative to the so-called Northern Corridor, which links China with Europe via Russia and Belarus (see: *The Middle Corridor. A Eurasian alternative to Russia*). Its importance has grown since Russia's invasion of Ukraine in 2022. Additional factors boosting interest in the Middle Corridor include conflicts along the so-called Southern Corridor, which runs through Iran, Afghanistan, and Pakistan. As a result, at a meeting of the heads of government of the Organisation of Turkic States held in Baku in early April this year, participants declared their intention to increase cargo volumes transported via TITR by a further 10% in 2026.

The development of transport routes is critical for Central Asian states given their plans for economic diversification. Although the Middle Corridor currently serves primarily trade with China and Turkey, it is also intended to support the expansion of economic relations with other partners, including the European Union. Barriers to the route's development include financial constraints, particularly for smaller Central Asian economies, relatively low interest from private investors, and the need for customs standardisation and the removal of bottlenecks along the route. The visible increase in international interest in transit via TITR offers an opportunity to address some of these challenges.

TITR as an opportunity for the development of Central Asian states

The Middle Corridor comprises road, rail, and maritime transport, primarily via ferries. Kazakhstan leads regional efforts to develop the route, owing to its geographical position – through which the main corridor passes – as well as its well-developed rail network and the ongoing modernisation of Caspian ports. At last year's consultative meeting of Central Asian leaders, Astana proposed the creation of a joint regional transport strategy.

Beijing is also stepping up its political and financial engagement in the development of TITR, viewing it as part of the Belt and Road Initiative. Through a local joint venture, China has invested in several projects, including a railway linking China with Kyrgyzstan and Uzbekistan, which could potentially be integrated into the Middle Corridor. According to the Kazakh authorities, in 2024 and 2025 more than 80% of all land-based cargo transported from China to Europe passed through Kazakhstan, and this share continues to grow. However, the overall volume of cargo moved by land remains far lower than that transported to Europe by sea. Land routes do not yet offer a viable alternative to maritime shipping, primarily due to cost differences, as transit via TITR is several times more expensive than container transport by sea, despite maritime routes generally taking longer.

Owing to both domestic and foreign investment, some of the bottlenecks that slow transit due to the need for transhipment are beginning to ease. These arise when changing modes of transport and from technical differences, such as variations in railway track gauge between China and Kazakhstan and between Georgia and Turkey. The presidents of Azerbaijan and Kazakhstan have stated that the planned modernisation of the port of Aktau on the Caspian Sea will increase the volume of cargo transported between the two countries by ferry to 10 million tonnes annually. There are also plans to ship Kazakh uranium to Europe by sea. Chinese companies are involved in the port's development, with Lianyungang Port Group and the Kazakh railway company KTZ Express set to build a container terminal there by 2030.

Although the main route bypasses the other Central Asian states, its southern branches extend into Kyrgyzstan, Uzbekistan and Turkmenistan. Until recently, these countries attracted limited interest from foreign partners, partly owing to Turkmenistan's isolationist policy. They are now paying greater attention to the opportunities created by the development of transport routes. On 10 February, this year in Ashgabat, representatives of railway companies from Turkmenistan, Uzbekistan, Azerbaijan and Georgia signed a protocol outlining a joint strategy on TITR, including methods to eliminate bottlenecks. Tashkent has taken a particularly proactive approach to developing regional connectivity, prioritising the construction of the China–Kyrgyzstan–Uzbekistan (CKU) railway. The project was first proposed shortly after the collapse of the Soviet Union, but construction only commenced in 2025.

The transformation of Central Asian states into transit countries forms part of a broader process of expanding their economic relations with external partners. The development of the Middle Corridor's infrastructure is driven primarily by the advancement of regional integration. This includes plans for a joint strategy on transport and connectivity, covering the digitalisation and standardisation of customs procedures, as well as the expansion of Caspian ports, including Turkmenbashi in Turkmenistan. The strategy has been developed by the five Central Asian countries, together with Azerbaijan, which is increasingly considered part of the same political grouping as the so-called C5. These states aim to pursue a more coordinated policy towards external partners, including the European Union (see: '*Looking inward: regional cooperation in Central Asia*').

Growing interest from external partners

The Middle Corridor is attracting increasing international attention. Its development and related infrastructure investments involve both the traditional partners of Central Asian states, such as China, Turkey (for which the route is a key transport priority) and Azerbaijan, as well as countries and organisations with which the region is still developing ties, including Japan and the European Union. Over the past year, numerous agreements related to TITR have been signed, particularly during C5 summits with external partners.

The European Union is supporting the development of TITR by investing in Central Asian partners and advancing its connectivity strategy linking Europe with Turkey, the South Caucasus, and Central Asia. At the Investment Forum in Tashkent in November 2025, it pledged more than €30 million for projects related to the corridor. A broader strategy to expand the capacity of the Trans-Caspian Corridor is also set to be implemented with EU backing, particularly from Germany and France. In parallel, the European Bank for Reconstruction and Development has announced loans for regional projects, including the modernisation of the port in Aktau and upgrades to road infrastructure in Kazakhstan, Kyrgyzstan, and Uzbekistan. These efforts are expected to be supported under the EU's Global Gateway programme.

Investment in TITR is not limited to countries that directly use the route for transit. At the C5+Japan summit in December 2025, Prime Minister Sanae Takaichi pledged support to Kazakhstan in simplifying customs procedures at the port of Aktau, alongside a willingness to invest in roads, ports, railways, and logistics centres. Tokyo views this as a way to deepen cooperation with Central Asian states in the fields of energy and critical raw materials, with related agreements also signed at the summit. From Japan's perspective, support for TITR forms part of a broader strategy to strengthen energy and resource security and diversify supply chains. Other countries, including the United States and the United Kingdom, which have expanded their economic and political engagement with Central Asia since 2025, may follow a similar path, seeking to build stronger ties with their Central Asian partners and diversify supplies of energy resources. Recent signals include a US declaration in February this year on planned investments in railway development in Kazakhstan.

Prospects and constraints

The conflict between Afghanistan and Pakistan has severely disrupted the smooth transit of goods from Central Asia to the south, making the Middle Corridor the only viable overland alternative. Interest in transport via TITR has also grown following the US–Israeli strikes on Iran. However, its regional consequences have raised concerns about the stability of the western section of the route, particularly with regard to the security of the Caspian Sea, Azerbaijan, and Turkey.

Despite these risks, both the C5 states and their external partners view the Middle Corridor as a promising option. Diversifying transport routes between the two continents and reducing reliance on transit through Russia via the so-called Northern Corridor is important both for recipients, including the European Union, and for Central Asia, as it seeks to reduce its dependence on Moscow. Countries in the region increasingly see value in prioritising the connectivity sector, recognising its potential to develop into transport and logistics hubs and support broader economic diversification.

At the same time, several challenges remain. These include the need to ease bottlenecks, modernise Caspian ports, and streamline customs procedures. Efforts to address these issues are already under way, supported in part by foreign investment. Growing interest in the Middle Corridor may translate into greater backing from partners and investors, potentially including subsidies from countries such as China, which has a strong interest in the route's development.