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Central Asian States Race to the Sea

Khagani Gasimov | Report | October 2026





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THE “STANS” STRANDED

Central Asian States Race to the Sea

Central Asia is increasingly caught between wars and economic sanctions in neighbouring countries. These disruptions have constrained established trade routes, forcing the region to improvise and rely more heavily on alternative corridors. Yet many alternatives are multimodal, distant and costly, limiting their ability to replace traditional routes. As a result, Central Asia faces a shrinking number of viable pathways to international markets.



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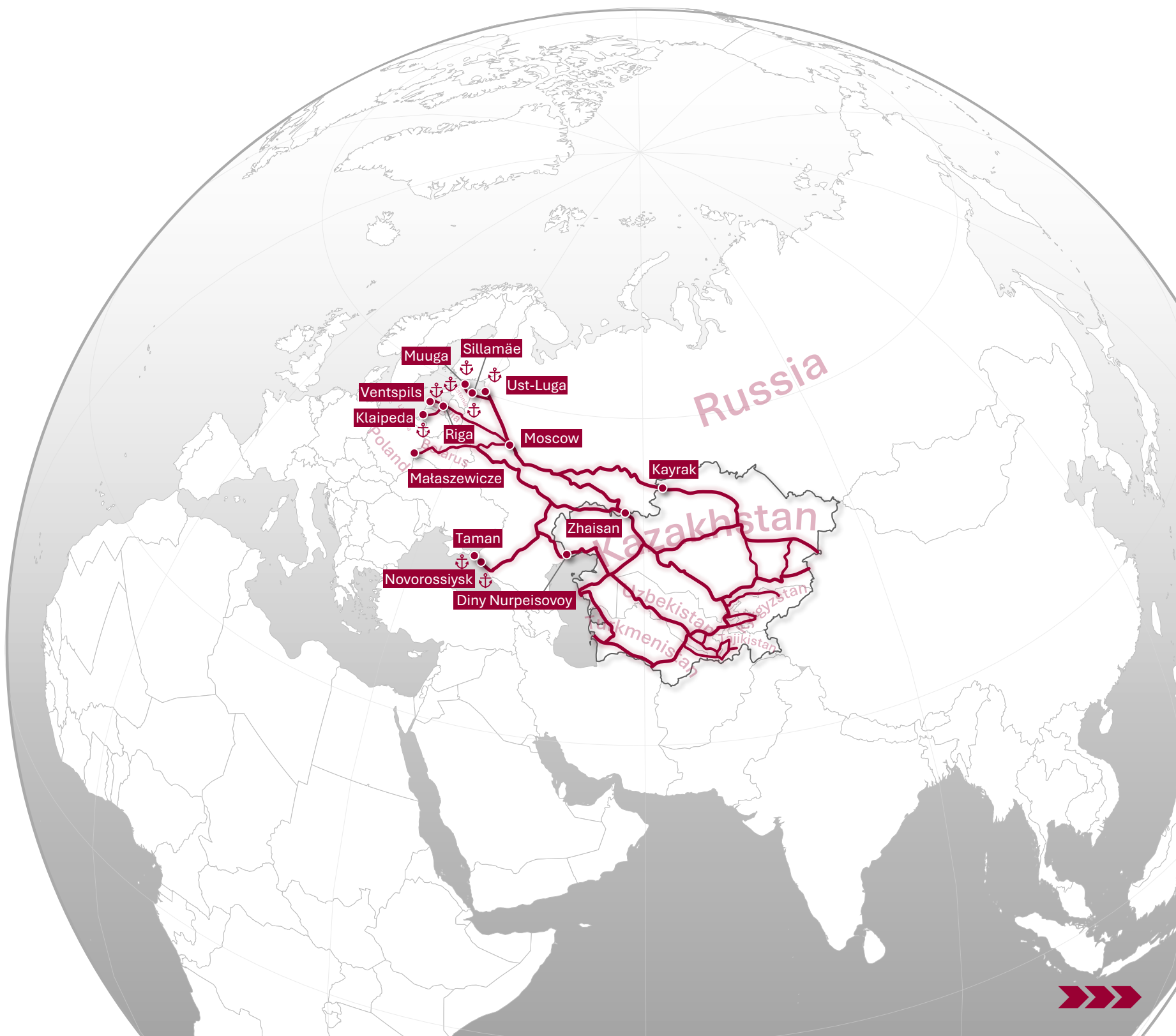
The “Stans” are running out of routes to the sea. >>>>





An established rail network connects Central Asia to European markets through Russia, with links to major Baltic and Black Sea gateways. Its long-standing infrastructure and relatively low transit friction have made it a key Eurasian trade route. Since 2022, geopolitical disruption and sanctions have *exposed the risks* of relying heavily on this corridor, increasing interest in alternative routes.

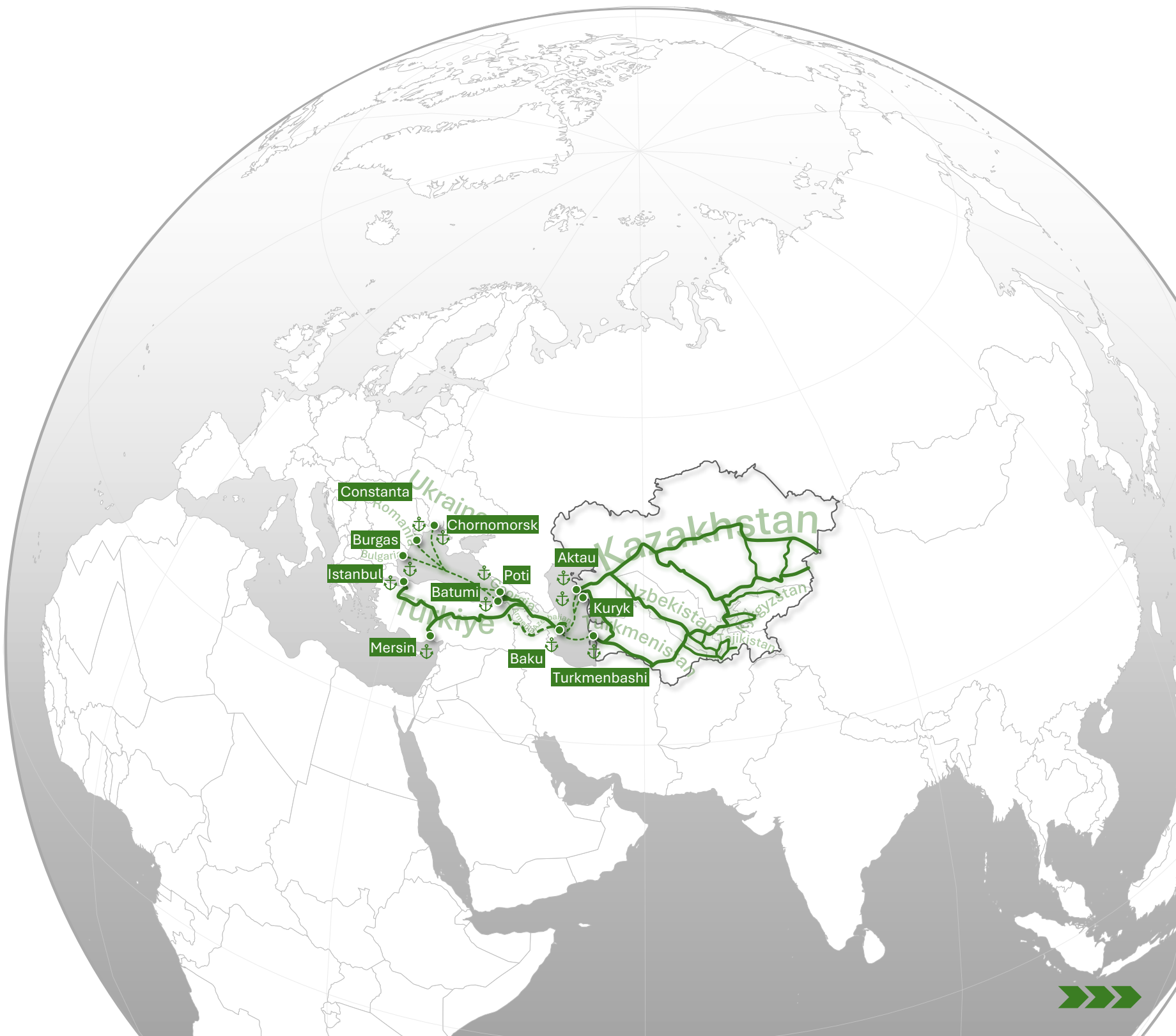
Connected Parties





The Trans-Caspian Transport Corridor, widely known as the Middle Corridor, is a *promising yet underutilised* route through the South Caucasus. Parallel routes are being developed to take pressure off bottleneck areas and increase capacity. Operational inefficiencies, infrastructure gaps, climate change, and geopolitical risks continue to hinder the Middle Corridor and may ultimately constrain its long-term viability.

Connected Parties





GULF REGION

The second major alternative route for Central Asian countries seeking access to international seas, with the Gulf as the main maritime outlet through Iran, while also carrying significant volumes of freight westwards towards Türkiye. A gauge change on the Iranian border and ferries across Lake Van add friction. Recent military tensions and mounting economic and sanctions pressure on Iran have further *complicated its feasibility*.

Core Actors



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STATUS

OPERATIONAL



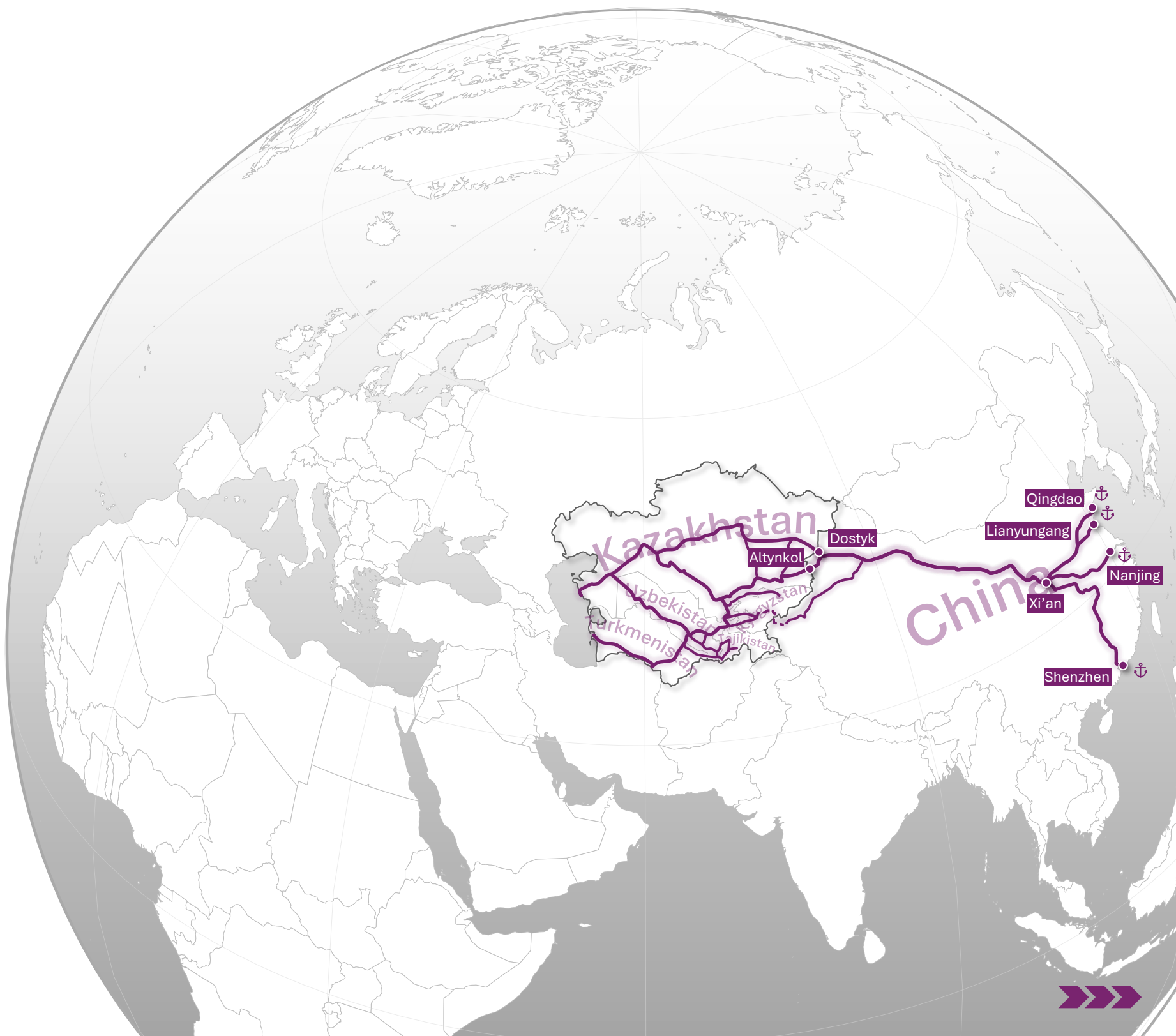
CHINESE PORTS

Usually, it is the other way around, with China using transport corridors to export its products into Central Asia and as transit routes to Western markets. However, *growing pressure has pushed* Central Asian countries *to explore Chinese ports* for their own exports. With Chinese goods already occupying much of the available capacity, China has increasingly positioned Lianyungang and Qingdao as main gateways for Central Asian trade.

Core Actors



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INDIAN OCEAN

The Trans-Afghan Railway project aims to connect Central Asian countries to Pakistani ports on the Indian Ocean coast. The ambitious project *remains in its early stages* and requires new rail infrastructure across Afghanistan. Financial constraints and rising Afghanistan-Pakistan tensions, including border closures, remain key barriers. However, the “Stans” have recently found ways to bypass Afghanistan through Iran and China to reach Pakistani ports.

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ARCTIC ROUTE

Peaking in the 1970s, inland river routes via the Ob-Irtysh system remain a shadow of their former self. Kazakhstan *aims to revitalise the route* to access the global maritime markets via Sabetta on the Arctic Ocean. While logistically feasible, seasonality, hydroelectric dams and water-level constraints remain key barriers. Reviving it would require regional cooperation and could potentially connect other Central Asian countries by rail.

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EURASIA CANAL

Every few years, the idea of a new canal *connecting the Caspian and Black Seas* resurfaces. It would give Caspian ports access to global maritime routes. The existing Volga-Don system provides a link, but seasonal navigation and draft restrictions limit its commercial potential. The proposed Eurasia Canal would use the Kuma-Manych Depression, connecting existing lakes and waterways.

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