

ASIA-EUROPE/CHINA-EU LAND TRANSPORT AND TRADE ROUTES AND THE POTENTIAL OF THE MIDDLE CORRIDOR

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As China emerged as a major manufacturing powerhouse and trade between China and the EU expanded, the transport and trade routes linking Asia/China with Europe/EU gained geoeconomic and geopolitical importance. The strategic relevance of these routes has been further intensified by Russia's invasion of Ukraine in February 2022, which prompted Western sanctions aimed at isolating Russia and undermining its military, political, and economic strength. This geopolitical shift has highlighted the Trans-Caspian International Transport Route (TITR)— the Middle Corridor—as an alternative to the Eurasian Land Bridge Economic Corridor- the Northern Corridor, which connects China with Europe via Russia. Initially conceptualized in 2013 and operational since 2017, the Middle Corridor has demonstrated notable growth in recent years. However, it faces significant infrastructural challenges, both hard and soft, that negatively affect its competitiveness relative to the Northern Corridor. To fully realize the Middle Corridor's potential and position it as a primary land route between Asia and Europe, substantial investment and extensive improvements are required. Opportunely, recent developments suggest a growing interest from international stakeholders in investing in the Middle Corridor, indicating its potential to become the dominant intercontinental land transport and trade route between Asia and Europe.

Keywords: Asia-Europe trade, China-EU trade, Middle Corridor, Northern Corridor, Trans-Caspian International Transport Route, transport and trade routes

1. Introduction

The shift from unipolarity to multipolarity marked by intense political, economic, and ideological rivalry among major powers increasingly shapes the global geopolitical landscape. In addition to great power competition, the rising influence of Global South nations and middle powers adds further complexity to global geopolitics. As the number of influential actors grows, so do the contentious issues. In this picture, international transport and trade routes gain prominence due to their strategic value, influencing both economic and geopolitical domains as they sit at the intersection of geoeconomics and geopolitics. It could even be argued that transport and trade routes in recent times are more about geopolitics than economics.

Correspondingly, as China rises as a leading manufacturing force and trade between China and the EU grows, the transport and trade routes connecting Asia and Europe, as well

as China and the EU, become increasingly important. Russia's invasion of Ukraine in February 2022, which led to Western sanctions and efforts to isolate Russia to weaken it politically and economically in the medium to long term, has further augmented the geopolitical relevance of these routes. As a result, the Trans-Caspian International Transport Route (TITR) – the Middle Corridor - linking Asia and Europe/China and the EU through Central Asia, the Caspian Sea, the South Caucasus, the Black Sea, and Türkiye has sat at the center of strategic calculations as a possible alternative to the Eurasian Land Bridge Economic Corridor -the Northern Corridor - which connects China with Europe via Kazakhstan, Russia, and Belarus, and has been the primary transcontinental land-route between Asia and Europe.

Upon that background, this article aims to examine transport and trade routes between Asia and Europe/China and the EU with a particular focus on the Middle Corridor. To do that, it starts with a brief comparison of maritime, land, and air cargo transportation that reveals the dominance of maritime transport. This is followed by a summary of the key features of the three main Asia-Europe/China-EU land transport and trade routes, i.e., the Northern, Southern, and Middle corridors. The article subsequently explores the history and current state of the Middle Corridor, particularly in relation to the Northern Corridor. It continues with the presentation of potential scenarios for the future of the Middle Corridor and a summary of the recent steps taken to improve this route before the conclusion section.

2. Asia-Europe/China-EU Trade and Maritime, Land, Air Cargo Transportation

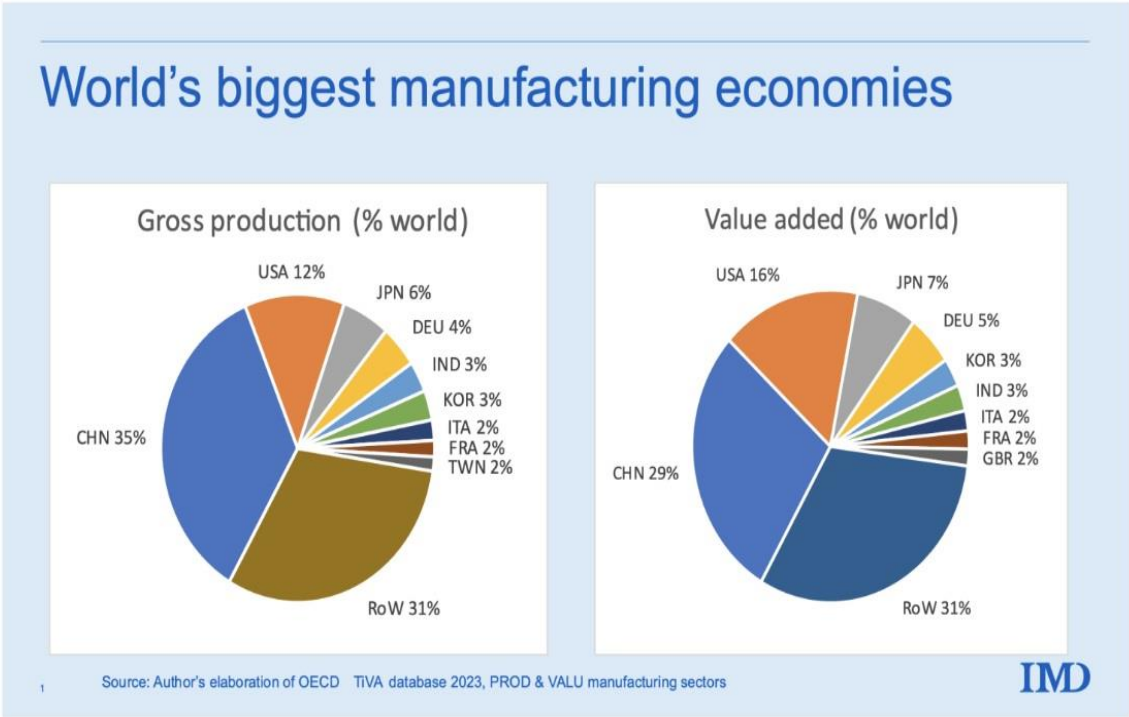
Starting with the economic reforms in 1978, China embarked on a path to become a global manufacturing powerhouse, steadily boosting its manufacturing output. In fact, China achieved an impressive progress in its production capacity so that whereas in 2010 its share of global manufacturing value was 19%, this was raised to 22.5 % in 2012, 28.7% in 2019, 30% in 2021, and 34% in 2023. In 2024, China's share was recorded as 31.63% (see, Figure 3). In that picture, in 2020, China accounted for an impressive 35% of global gross manufacturing output, significantly surpassing other major economies. In comparison, the US contributed about a third of China's share, Japan only a sixth, and Germany a mere ninth (see, Figure 2 and Figure 3). Additionally, China's proportion of global manufacturing exports had surged to 20 % by 2020, up from just 3% in 1995. Notably, Chinese manufacturing sector has maintained its position as the world's largest for the last fourteen consecutive years. Accordingly, China gained a crucial role in the global supply chain as a manufacturer and exporter of goods (Seong, 2024; The State Council Information Office of China, 2024, March 11; The State Council Information Office of China, 2022, June 14; World Population Review, 2024; Zhu, 2024, February 2).

Figure 1.
Share of top ten manufacturing countries to global manufacturing in 2024

Country	Share of Global Manufacturing
China	31.63%
United States	15.87%
Japan	6.52%
Germany	4.78%
India	2.87%
South Korea	2.71%
Russia	1.83%
Italy	1.8%
Mexico	1.69%
France	1.65%

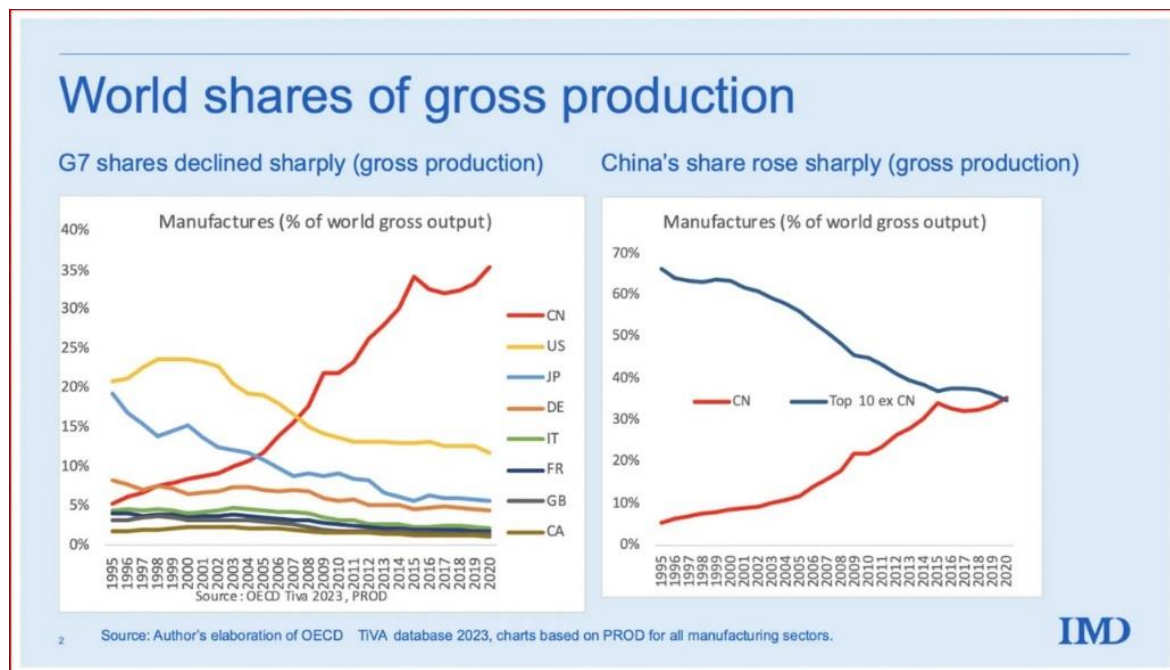
Source: World Population Review (2024)

Figure 2.
World’s biggest manufacturing economies in 2020.



Source: Norton (2024)

Figure 3.
World shares of gross production

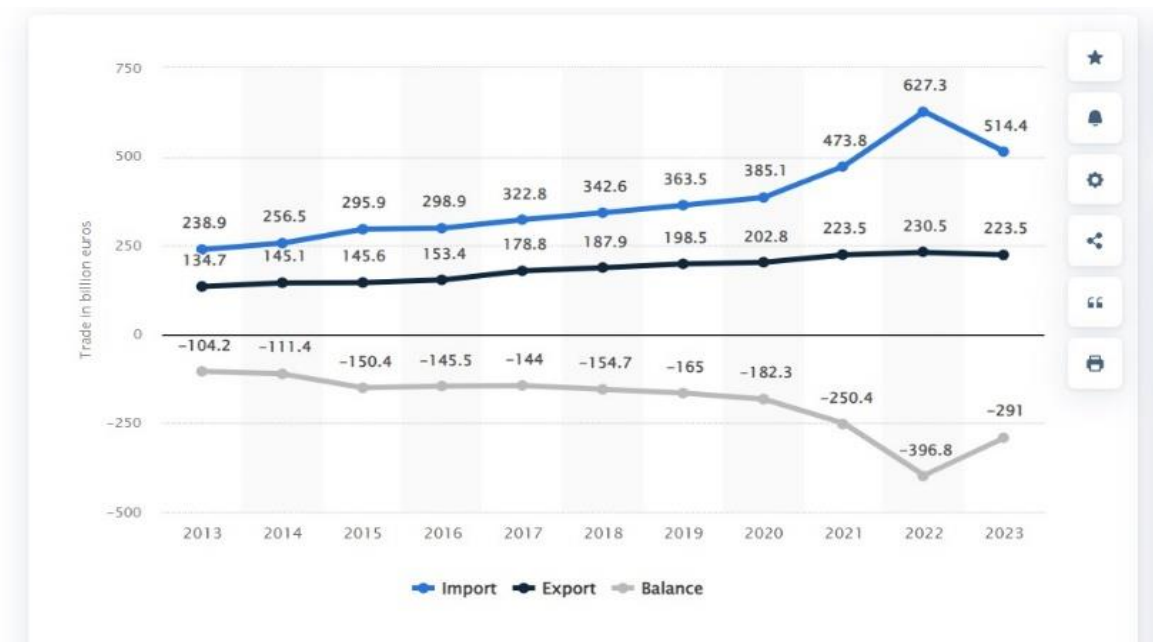


Source: Norton (2024)

As Figure 4 demonstrates, as China set to become an economic powerhouse, its trade with another economic giant, namely, the EU, continuously grew, particularly consequent to rising volumes of China's exports to the EU. In 2020, China surpassed the US to become the EU's largest trading partner in goods, though the US reclaimed the top position in 2022 (Eurostat, 2024, July 12). Consequently, China's economic growth and the China-EU trade, more specifically Chinese exports to the EU, became the main engine of the intercontinental trade between Asia and Europe.¹¹

¹¹ For example, whereas in 2022 total trade between the EU and Central Asia was 47.5 billion Euros consequent to a 38.8% raise compared to 2021 (European Bank for Reconstruction and Development, 2023, p. 11), in the same year China-EU trade was 857.8 billion Euros (Eurostat, 2024, March 4) that is 18 times more than the former.

Figure 4.
Trade balance of the European Union with China from 2013 to 2023(in billion euros)



According to the European Bank for Reconstruction and Development (EBRD) (2023, p.11) approximately 80% to 85% of trade between the EU and China is transported by sea, 10% by land, and the remainder by air. Asian Development Bank (ADB) (2022, p.18), on the other hand, reports that in 2021, 96.3% of Chinese merchandise exports to Europe were carried through the sea.

Figure 5.
Share of rail, maritime, air transport of Chinese merchandise exports to Europe between 2018 and 2021 according to the Asian Development Bank.

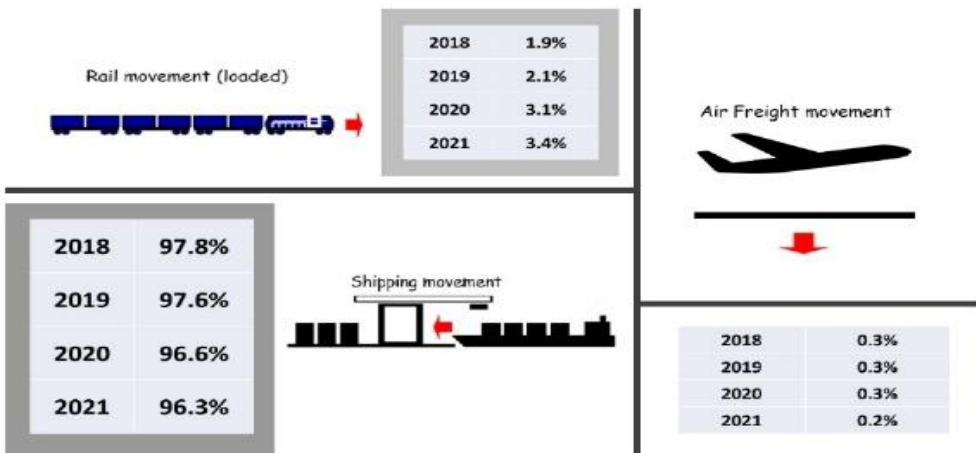


Figure 13 - Modal Market Share 2018-2021

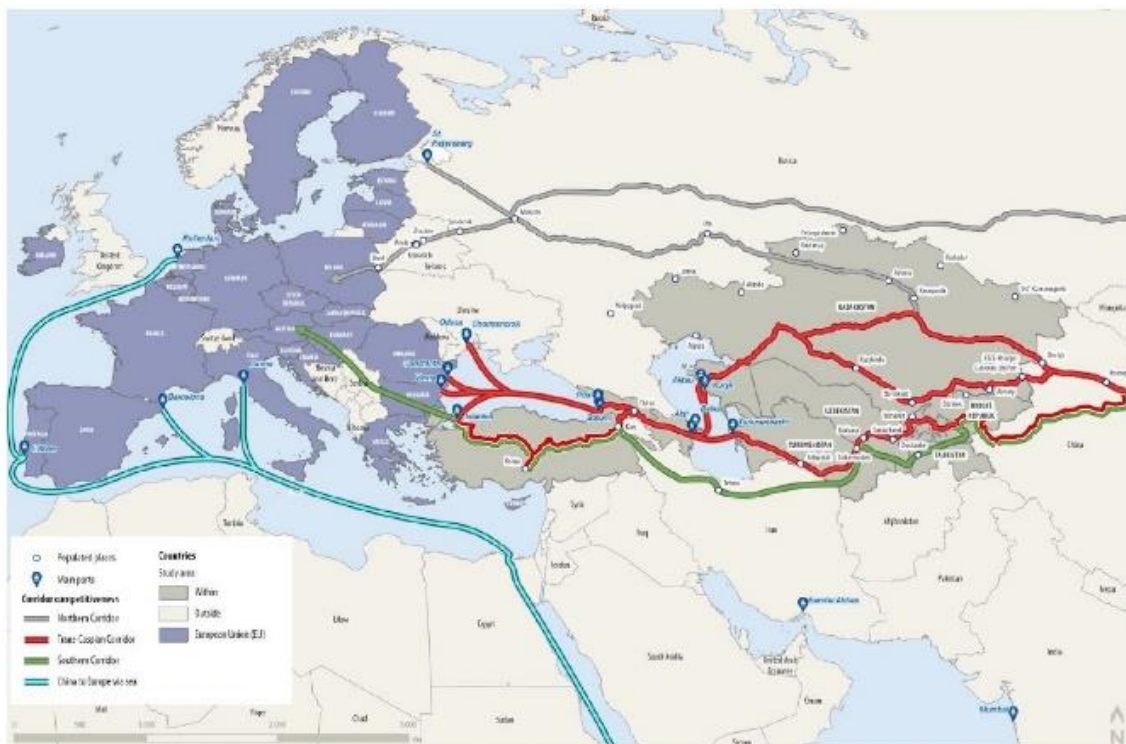
Source: Asian Development Bank (2022, p.18)

Despite variations in trade figures from different sources, it is evident that maritime transportation is the primary method for delivering goods between China and the EU. This is not a novelty since the World Bank Group (2024) reports that 80% of global trade is conducted by sea due to its numerous advantages including efficiency, low transportation costs, flexibility, adaptability to changing conditions, and minimal regulatory barriers (Asian Development Bank, 2022, p.16). While maritime transport dominates, land transportation, however, is an important leg of Asia-Europe/China-EU trade as a complementary mode of transport, the share of which is in an upward trend (see, Figure 5).

3. Asia-Europe/China-EU Land-Based Routes

Figure 6.

Asia-Europe/ China-EU land-based routes: Northern Corridor, Middle Corridor (Trans-Caspian Corridor), Southern Corridor



Source: CPSC.

Source: European Bank for Reconstruction and Development (2023, p.12)

Asia-Europe/China-EU land transportation is conducted through three different routes: the Eurasian Land Bridge Economic Corridor – the Northern Corridor, Southern Corridor, and the Trans-Caspian International Transport Route (TITR) - the Middle

Corridor (see, Figure 6). Each of the three routes has its own unique set of advantages and disadvantages compared to the others.

3.1. The Eurasian Land Bridge Economic Corridor - Northern Corridor

The Northern Corridor is a rail transport network comprised of two primary overland routes: the Trans-Siberian Railway and the New Eurasian Land Bridge (OECD, 2023, p.17). Completed in 1916, the Trans-Siberian Railway stretches from Vladivostok to the European Union. It links Russian Pacific ports with northeastern China and can handle up to 200,000 TEU (Twenty-foot Equivalent Unit) of containerized international transit cargo each year. The New Eurasian Land Bridge (completed during the second half of the 20th century), on the other hand, is the southern part of the Northern Corridor running through China and Kazakhstan, before crossing into Russia (see, Figure 7). From Kazakhstan, two North-South railways connect with the Trans-Siberian while another segment goes directly to Western Russia (OECD, 2023, p.17). In addition to these two main tracks, there is also a railway passing through Mongolia (European Bank for Reconstruction and Development, 2023, p.11).

The Northern Corridor is a well-established railway network that connects the entire Asian continent with Europe. The 2023 OECD report (2023, p.16) indicates that the Northern Corridor spans 12,000 km, while the 2023 European Bank for Reconstruction and Development report (2023, p.11) lists it as 10,000 km. Transit times through the Northern Corridor vary between 14 and 26 days.¹²

From a purely technical point of view, the Northern Corridor is the most efficient land route between China and the EU. It avoids the Caspian Sea, hence does not require shipping across this body of water. With fewer countries to cross, the route faces fewer border crossings and customs checks. These two, together with being a well-established, developed, and customary Asia-Europe/China-EU route, are the most salient relative advantages of the Northern Corridor. Despite these, however, Northern Corridor's efficiency is impeded by operational difficulties, technical obstacles, complex documentation requirements, administrative rules, and customs clearance procedures, which can extend transit times. Prior to the Russian invasion of Ukraine in February 2022, the Northern Corridor was the most frequently used land route between China and the EU, handling approximately 90% of the rail transit container traffic between the two sides (OECD, 2023, p. 16-17; Eurasian Rail Alliance Index, 2023b, p. 3). Despite its technical advantages, the Northern Corridor faces uncertainty about its future due to escalating tensions between the West and Russia.

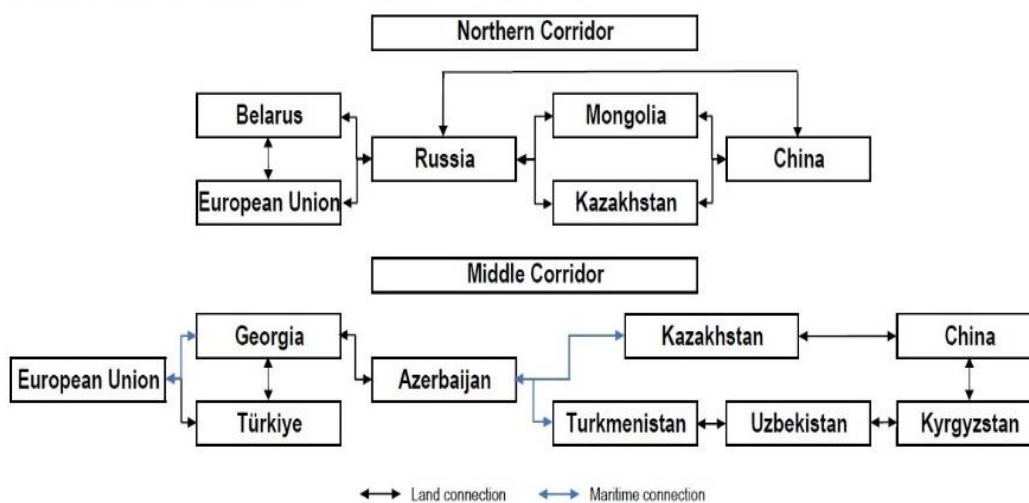
¹² It is important to recognize that various sources provide differing information on transit times for the Northern, Middle, and Southern corridors. For instance, the European Bank for Reconstruction and Development (2023, p. 11) reports an average transit time of 14 days for the Northern Corridor, while the Eurasian Rail Alliance Index (2023a) suggests a range of 20-26 days for the same route. This article presents approximate transit times for these land routes based on the varying figures provided by different sources.

3.2. The Southern Corridor

The Southern Corridor connects China and the EU via the Kyrgyz Republic or Tajikistan, Uzbekistan, Turkmenistan, Iran, and Türkiye before entering Europe via Bulgaria or Greece. Another potential part of the Southern Corridor is the route crossing Afghanistan and Central Asia, though this alternative is not discussed in earnest because of political and security-related drawbacks. A key advantage of the Southern Corridor, similar to the Northern Corridor, is that it is an all-land-based route avoiding the challenges associated with crossing the Caspian Sea. However, this benefit is undermined by the underdeveloped infrastructure in Kyrgyz Republic, Tajikistan, Uzbekistan, Turkmenistan, and Iran. Efficiency is a serious defect of the Southern Corridor that results in unpredictable transit times that can extend to 60 days or more (European Bank for Reconstruction and Development, 2023, p.11). Yet, the major obstacle to the Southern Corridor's development is the geopolitical context. Due to tensions between Iran and the West, there is limited interest from international stakeholders in investing in this route's development.

Figure 7.

Northern and Middle Corridor schematic routes



Source: OECD analysis (2023)

Source: OECD (2023, p.16)

3.3. The Trans-Caspian International Transport Route (TITR) - Middle Corridor

The Middle Corridor traverses Central Asia, the Caspian Sea, Azerbaijan, and Georgia, and then continues through either the Black Sea or Türkiye before reaching the EU. The primary feature and critical segment of the Middle Corridor is the Caspian Sea crossing, which can be navigated via three distinct tracks: the Northern Trans-Caspian Corridor, the Central Trans-Caspian Corridor, and the Southern Trans-Caspian Corridor (European Bank

for Reconstruction and Development, 2023, p.14). As shown in Figure 8, the Northern and Central Trans-Caspian Corridors cross Kazakhstan, while the Southern Trans-Caspian Corridor goes through Kyrgyz Republic, Uzbekistan, and Turkmenistan, reaching the Turkmenbashi port on the Caspian Sea. Among these options, the Northern and Central routes are the most frequently discussed ones, while the Southern route receives lesser attention, even so that it is not mentioned on the International Association “Trans-Caspian International Transport Route” website (see, Middle Corridor, 2024). According to the EBRD’s 2023 report, the Northern Trans-Caspian Corridor is the most suitable of the three. Additionally, the Middle Corridor offers two alternative paths from the South Caucasus to the EU: a maritime route through the Black Sea and a land route via Türkiye.

Figure 8.

Alternative routes between Europe and Central Asia via the Caspian Sea



Source: European Bank for Reconstruction and Development (2023, p. 14).

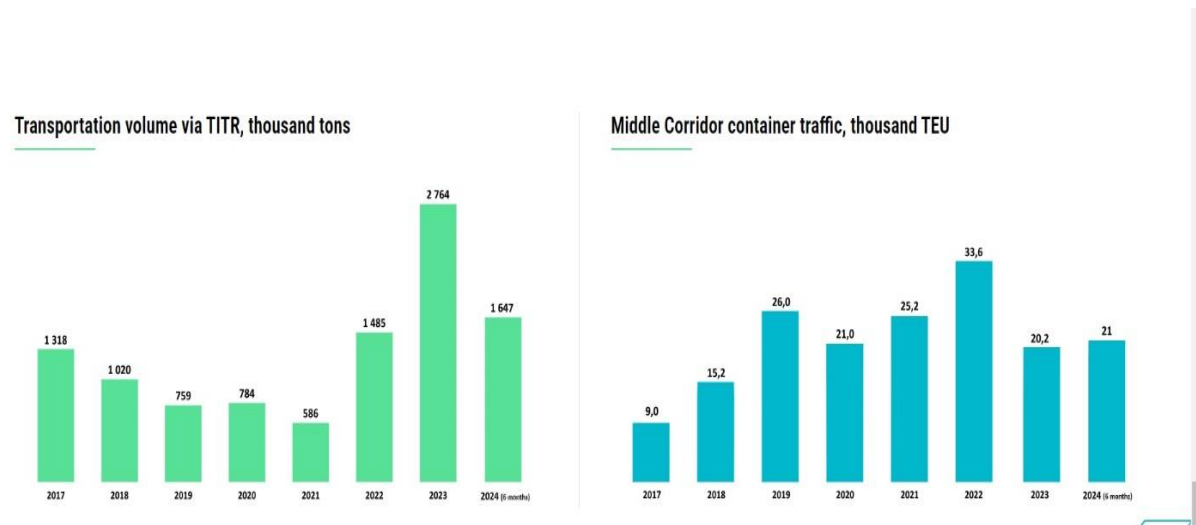
The Middle Corridor is a recent project launched by Kazakhstan in 2013 and commenced operations in 2017. As such, it remains a developing transport and trade route, in contrast to the well-established Northern Corridor. The most noticeable relative advantage of the Middle Corridor is its 7,000 km length compared to the 10,000-12,000 km-long Northern Corridor. However, hard and soft infrastructural problems, as well as bottlenecks along the route cause extensions and unpredictability of transit time and higher transit costs. It is reported that transport time along the Middle Corridor varies from 14 to 45 days, even up to 60 days (European Bank for Reconstruction and Development, 2023, p.11).¹³

¹³ Please see footnote 1 for a disclaimer on different information about the transit times of the Northern, Middle, and Southern corridors in different sources.

4. The Middle Corridor: Its Current Status

As demonstrated in Figure 9, the container traffic on the Middle Corridor was 9.000 TEUs when in its first year of service in 2017. From then on, the cargo shipment saw a continuous increase until 2019, when the container traffic reached 26,000 TEUs, meaning in the first three years of the Middle Corridor, the container transport increased by 166.7%. In 2020, the shipment fell to 21,000 TEU amounting to a 19.2% decrease, mainly as a result of the negative effects of the Covid-19 pandemic on global trade. In 2021, the cargo volumes approximated to the 2019 level increasing to 25,200 TEUs. In 2022, following the Russian invasion of Ukraine and the resulting decline in the use of the Northern Corridor by Western logistics companies, attention shifted to the Middle Corridor. As a result, the Middle Corridor saw a record of 33,600 TEUs of container traffic. However, this upward trend did not last and in 2023 and the cargo volume on the Middle Corridor sharply fell to 20,200 TEUs, a level lower than that of 2020. In the first six months of 2024, the volume was recorded as 21,000 TEUs (Middle Corridor, 2024).

Figure 9.
Transportation volume in thousand tones and container traffic in thousand TEUs via the Middle Corridor between 2017 and the first six months of 2024



Source: Middle Corridor (2024)

As these figures demonstrate, the volume of cargo transport on the Middle Corridor fluctuates (see, Table 1). One major reason for the unevenness is variations in sea freight rates, which influence the decisions of logistics companies. However, besides this market dynamic, the Middle Corridor-specific reasons and the problems impair the expediency and competitiveness of the Middle Corridor.

Table 1.

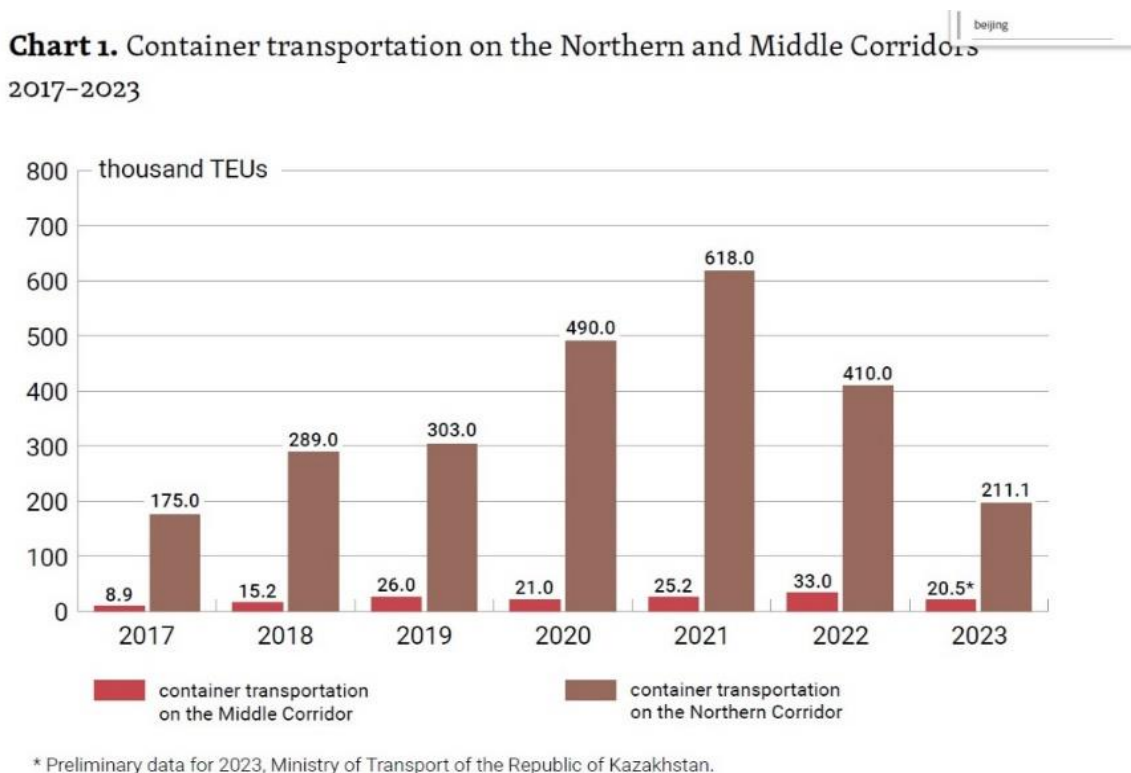
Increase/decrease in container transportation via Northern and Middle corridors in percentages compared to previous year

	Northern Corridor (%)	Middle Corridor (%)
2018	65.1	70.8
2019	4.8	71.1
2020	61.7	-19.2
2021	26.1	20
2022	- 33.7	30.9
2023	- 48.5	-37.9

Source: Own Elaboration

Figure 10.

Container transportation in thousand TEUs on the Northern and Middle corridors between 2017 and 2023



Source: Popławski et al. (2024, p.14)

Figure 10 shows the volumes of container transportation on the Northern Corridor and Middle Corridor. These figures demonstrate that in seven years between 2017 and 2023, the Middle Corridor carried only 6 % of the container volume that the Northern Corridor carried as (see, Table 2). This reveals that the Middle Corridor handles only a fracture of what the Northern Corridor handles.

Table 2.

Container transportation via Northern and Middle corridors in TEU between 2017 and 2023 and the comparison of the volume via the Middle Corridor with the volume via the Northern Corridor in percentages

	Northern Corridor (TEUs)	Middle Corridor (TEUs)	Container Transportation on Middle Corridor in comparison to the Northern Corridor (%)
2017	175,000	8,900	5.1%
2018	289,000	15,200	5.3%
2019	303,000	26,000	8.6%
2020	490,000	21,000	4.3%
2021	618,000	25,200	4.1%
2022	410,000	33,000	8%
2023	211,100	20,500	9.7%
Total between 2017 and 2023	2,496,100	149,800	6%
Avarage between 2017 and 2023	356,600	21,400	6%

Source: Own elaboration

Thus, it is clear that substantial improvements are necessary for the Middle Corridor to genuinely serve as an alternative to the Northern Corridor.

5. Prospects for the Development of the Middle Corridor

The European Bank for Reconstruction and Development report dated June 16, 2023, titled “Sustainable Transport Connections between Europe and Central Asia” offers insights into the potential development of the Middle Corridor. According to this report, in a “business-as-usual scenario,” the volume of transit containers on the Central Trans-Caspian Corridor, the most promising track for the Caspian Sea passage, could rise from 18,000 TEUs in 2022¹⁴ to 130,000 TEUs by 2040. The same report sustains that this volume could go up to 865,000 TEUs by the same year if investment projects and soft connectivity measures were implemented to achieve a free-flow transit time of 13 days. Additionally, increased traffic on the Northern and Southern Trans-Caspian Corridors could be expected, with volumes reaching 270,000 TEUs and 254,000 TEUs, respectively, due to spill-over effects. Consequently, by 2040, a total of 1.4 million containers could transit through Central Asia and connect to Europe, provided that all proposed improvements are implemented to boost the operational efficiency of the route.

According to the same report, the required investments encompass the rehabilitation and modernization of railway and road networks, expansion of rolling stock, enhancement of port capacities, upgrades to border crossing points, and development of multimodal

¹⁴ In 2022, the total amount of container traffic via the Middle Corridor was 33,000 TEUs. Hence, the Central Trans-Caspian Corridor handled 54.5% of the total container transportation through the Middle Corridor this year.

logistics centers and supplementary network connections across all five participating countries, which would amount to €18.5 billion of investment (European Bank for Reconstruction and Development, 2023, p.45-47). Overall, the European Bank for Reconstruction and Development report suggests that the Middle Corridor could reach and surpass the Northern Corridor's potential and become the primary land route between Asia and Europe if necessary investments and improvements are achieved.

The required investment is substantial and the improvements are likely to take serious effort. The recent developments, opportunely, highlight the growing interest of international stakeholders in investing in the Middle Corridor. For example, in July 2022, the European Bank for Reconstruction and Development committed over \$100 million to upgrade Kazakh railways (Popławski et al., 2024, p. 21), which amounts to a contribution to the infrastructural development of the Middle Corridor. In May 2023, G7 leaders declared their commitment to support Central Asian countries in addressing regional challenges and fostering trade, energy connections, sustainable transport like the Middle Corridor, and related initiatives. G7 leaders also renewed their commitment to the G7 Partnership for Global Infrastructure and Investment (PGII), emphasizing their goal of collaborating to mobilize up to \$600 billion by 2027 to strengthen global partnerships for public and private investments in sustainable, inclusive, resilient, and quality infrastructure with partner countries (The White House, 2023, May 20). In September 2023, at the Germany-Central Asia Summit, leaders from Central Asia and Germany expressed interest in developing the Middle Corridor and securing financing through the EU's Global Gateway initiative (Euronews, 2023, September 30). At the Global Gateway Investors Forum in January 2024, it was announced that European and international financial institutions would invest €10 billion to improve sustainable transport connectivity in Central Asia (European Commission). In addition to Western actors, China also shows interest in the Middle Corridor. As to that, during the Third Belt and Road Forum in October 2023, Chinese President Xi Jinping announced China's intention to participate in the Middle Corridor project (Xinhua, 2023, October 18). As importantly, in recent years, actors involved in the Trans-Caspian International Transport Route (TITR) association have demonstrated a stronger commitment to advancing the Middle Corridor. This includes the signing of various declarations and agreements between the TITR countries to enhance cooperation. Major global logistics and shipping companies, including Italy-Switzerland's MSC, Denmark's Maersk, France's CMA CGM, China's COSCO, and Israel's ZIM have launched services along the Middle Corridor. Finnish company Nurminen Logistics, CEVA Logistics, and DHL are also active on this route. Agreements have been signed involving German, Lithuanian, and Austrian companies to further boost the corridor's development (Carafano, 2022; Dupuy, 2024; Popławski et al. 2024, p. 6-7&14; Satubaldina, 2023, December 28). All these developments in recent years point to the possibility of the Middle Corridor to develop to become the principal intercontinental land transport and trade route between Asia and Europe.

6. Conclusion

China's growing manufacturing power and its trade with the EU amplifies the geoeconomic and geopolitical significance of Asia-Europe/China-EU transport and trade routes. In this context, consequent to Western sanctions and efforts to politically and economically isolate Russia as a response to the latter's invasion of Ukraine in February 2022, the Trans-Caspian International Transport Route (TITR) - the Middle Corridor - has become a focal point in strategic planning as it began to be considered as a potential alternative to the Northern Corridor which links China with Europe via Russia. In its current state, the Middle Corridor has certain disadvantages due to hard and soft infrastructural problems that impede it from assuming the role of the Northern Corridor as the primary land-based transport and trade route between Asia/China and Europe/EU. Yet, with enough investment and adequate improvements, the Middle Corridor has the potential to overtake the place of the Northern Corridor. The current geopolitical climate is favorable for this development. International actors including governments and the private sector show a rising interest in the development of the Middle Corridor. This interest can be translated into more investments in the route. Certainly, the conduct of the Middle Corridor countries, that is, the Central Asian countries, Azerbaijan, Georgia, and Türkiye, will be decisive for the future of the Middle Corridor. Adopting a regional perspective and taking steps towards further economic and political regionalization will be crucial for developing the Middle Corridor, which could offer substantial economic, political, and strategic advantages to these nations.

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