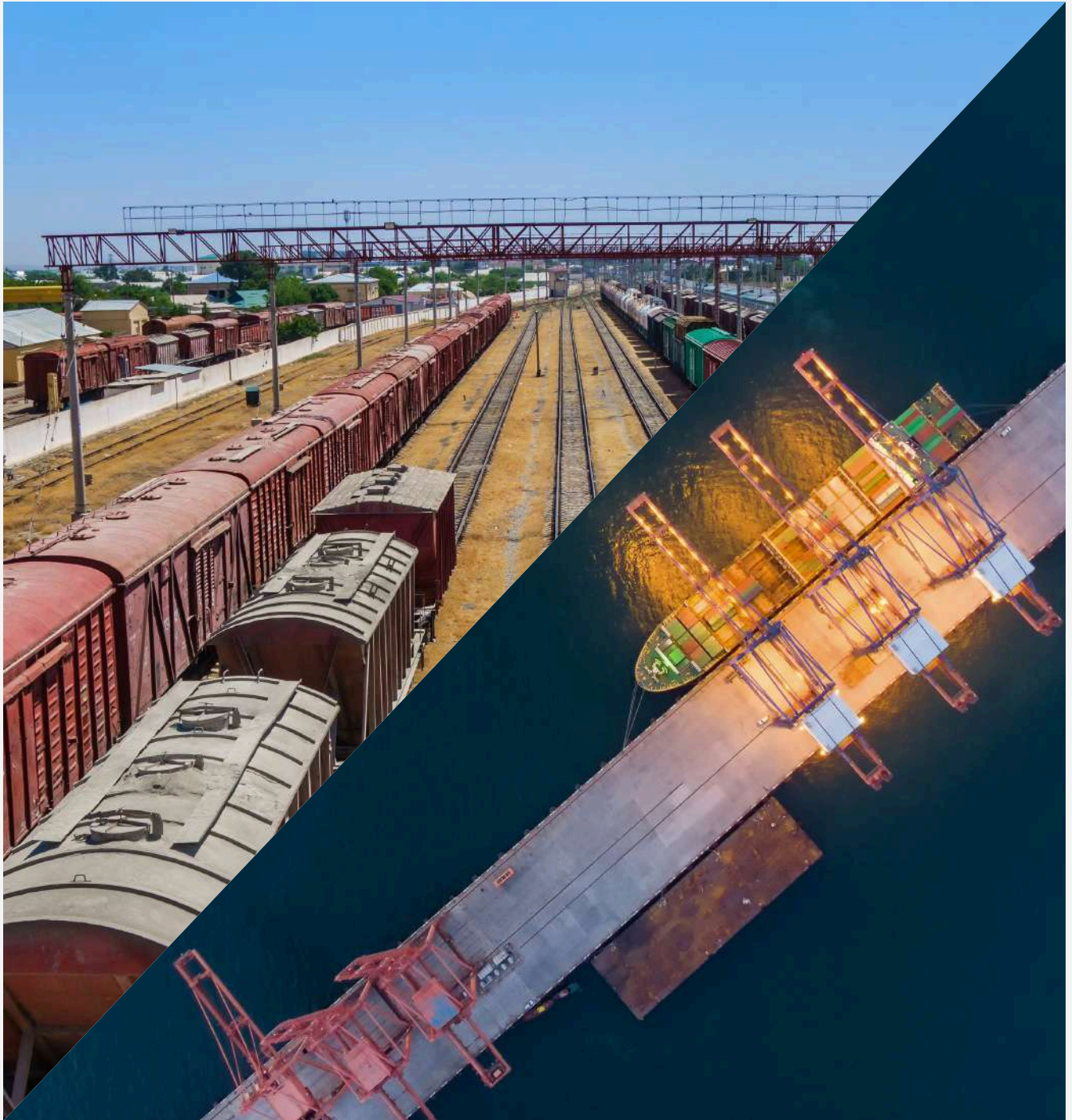


# HOW TO MAXIMIZE THE MIDDLE CORRIDOR

June 2026 Edition

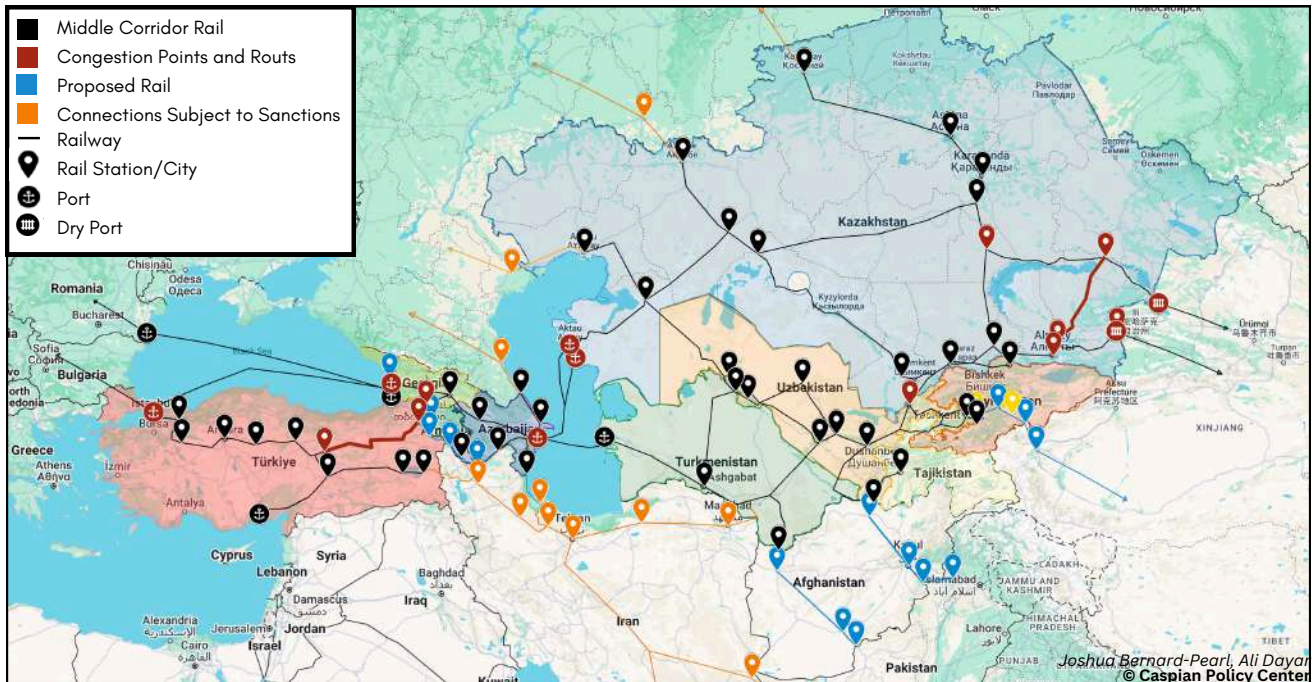
A Guide to Connectivity: Benchmarks, Barriers, and Investments



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# What is the Middle Corridor



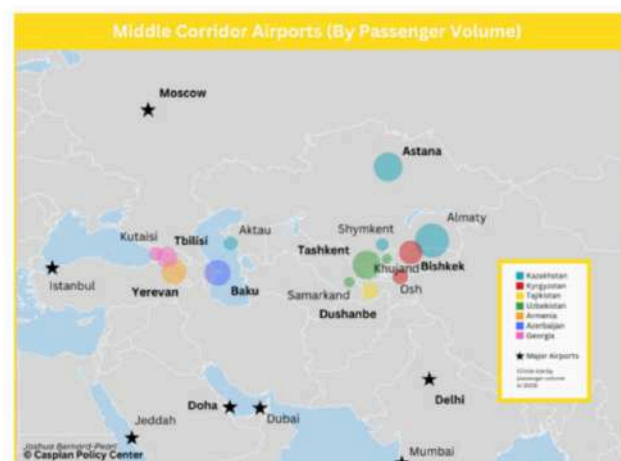
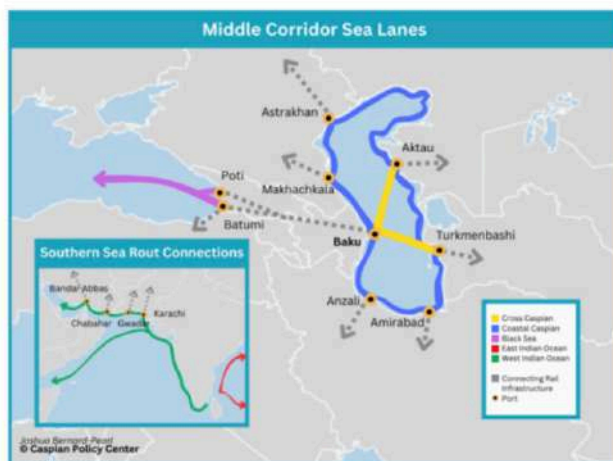
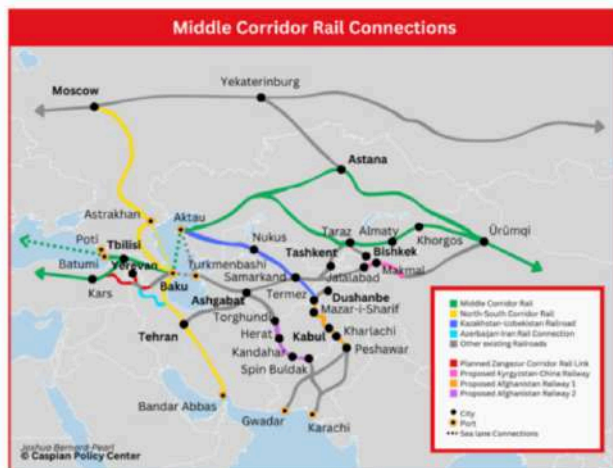
**The Middle Corridor**, also known as the Trans-Caspian International Transport Route, is a multimodal land and sea transport corridor, helping products move from as far as China to Europe through Kazakhstan, Uzbekistan, Turkmenistan, Azerbaijan, Türkiye, the Black Sea, and the Caspian Sea. The route consists of over 4,250 km (about 2640.83 mi) of rail lines and 500 km (about 310.69 mi) of seaway. With its total length estimated from 2,000 km to 3,000 km shorter than Russia's Northern Corridor, the Middle Corridor offers a resolution to sanction-compliance issues, access to new markets, and new opportunities for business-to-business (B2B) and business-to-government (B2G) engagements in logistics, transportation, and infrastructure construction.

Three proposed or ongoing rail projects promise significant connectivity enhancements for the Middle Corridor. The China-Kyrgyz Republic-Uzbekistan rail project will provide both connectivity to China's markets and even sea linkages for Central Asian goods, but also greater access to China exports and connectivity within Central Asia. Uzbekistan and Kazakhstan's efforts to develop a rail project that traverses Afghanistan and then connects to Pakistan and international waterways promises access to the sea lanes, and would provide a significant alternative for shipment of Central Asian export products.

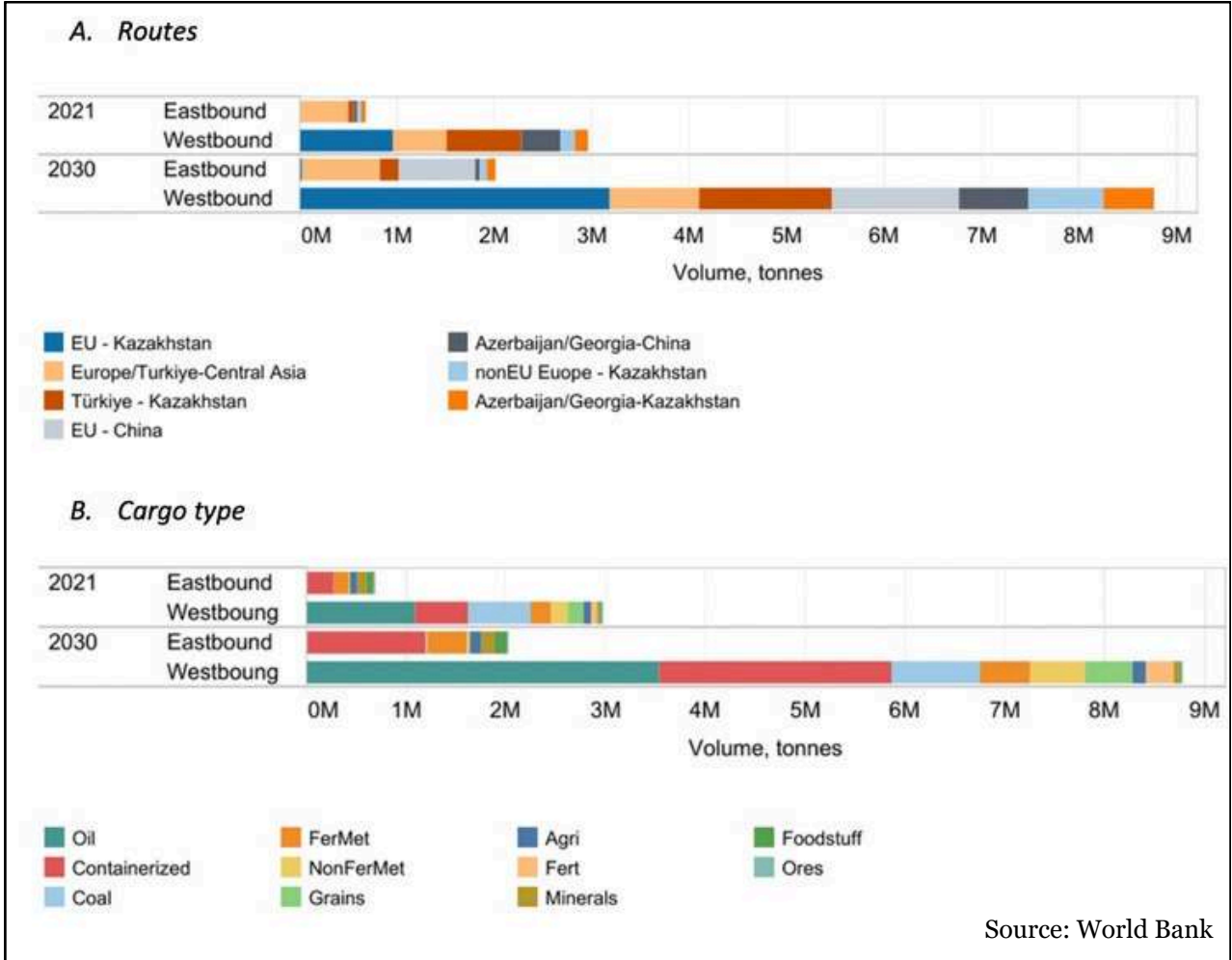
Finally, the development of the **Trump Route for International Peace and Prosperity (TRIPP)** between Azerbaijan and Armenia could more than double the capacity of trans-Caspian rail connectivity to the Black Sea by accessing routes through Türkiye to the Mediterranean Sea.

Plans for the Middle Corridor began in the early 2000s as a means of connecting Central Asia, the Caspian Sea, and the Caucasus to Europe and China. Significant progress in the Middle Corridor didn't occur until 2014 when the Trans-Kazakhstan railway was inaugurated. Following this was the inauguration of the Baku-Tbilisi-Kars railway in 2017, marking the first rail passage through the Caucasus mountains since the 1990s. However, it wasn't until 2020 that the first train utilizing the Middle Corridor trade route reached China from Türkiye. The period of 2020-2021 saw modest growth in the volume of goods transported along the corridor, from around 350,000 tons in 2020 to 530,000 and 2021.

However, what truly bolstered the corridor's utilization was Russia's invasion of Ukraine in 2022 and the subsequent economic sanctions imposed by the West on Moscow. From 2021 to 2022, total volume across the Middle Corridor surged, from just over **500,000 tons** to over **1.5 million tons**. In 2025, Middle Corridor cargo reached **4.12 million tons**.



# Middle Corridor Export Forecast



The World Bank’s forecast for 2030 MC transport. Westbound flows remain significantly higher due to Kazakhstan’s energy exports.

# Connectivity Benchmarks 2024-2026

The Middle Corridor took off in attention and investment following Russia's 2022 invasion of Ukraine and the economic isolation it brought upon the Russian Federation. However, four years since, the Middle Corridor has grown exponentially. From 2024 to 2026, the route reached new connectivity benchmarks and saw structural changes that forecast greater regional transit.

## Conflicts Brought to a Close

The countries of the Caspian region worked to end conflicts that have long hindered regional cooperation and connectivity. In February 2025, **Kyrgyzstan and Tajikistan** finalized an agreement demarcating a 970 kilo meter section of their shared border. Both countries' leaders signed the agreement into law in March. In August 2025, **Azerbaijan and Armenia** signed a peace agreement in Washington with U.S. mediation. Part of this agreement involves the establishment of the **TRIPP Corridor**, which will connect Azerbaijan's mainland with its Nakhchivan exclave. In both cases, the resolution of long running conflicts not only brings peace, but open up new opportunities for trade and prosperity, opening long closed borders.

## New Milestones and Agreements

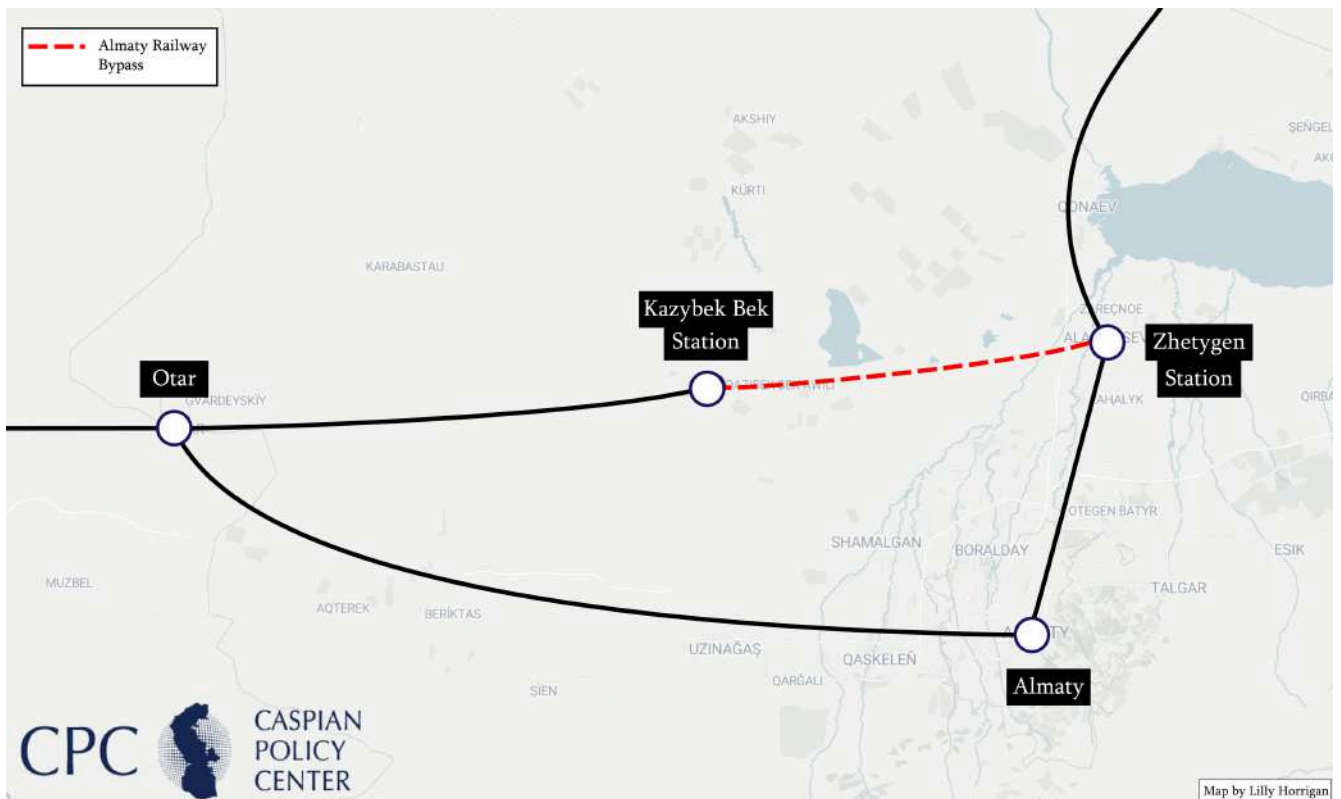
The past two years have also seen major innovative moves to build out the organizational infrastructure of the Middle Corridor.

- In September 2024, China joins the joint **Kazakhstan-Azerbaijan-Georgia Middle Corridor Multimodal** joint venture for rail development.
- The second ever **C5+1 “heads of state” summit** was held in Washington in November 2025, where Kazakhstan also places \$4.2B locomotive order from Wabtec on the sidelines.
- In January 2026, the U.S. and Armenia sign the **TRIPP Implementation Framework (TIF)**, establishing the TRIPP Development Company as a joint venture.
- A **bypass railway project** receives \$300M in total financing in February 2026, creating a separate freight corridor north of Almaty.
- That same month, the World Bank and the Asian Infrastructure Investment Bank (AIIB) collectively commit \$1.41B to finance the construction of a new 322-kilometer railway line between Mointy and Kyzylzhar, Kazakhstan.

## Map of TRIPP Corridor Project



## Map of Planned Almaty Bypass Railroad



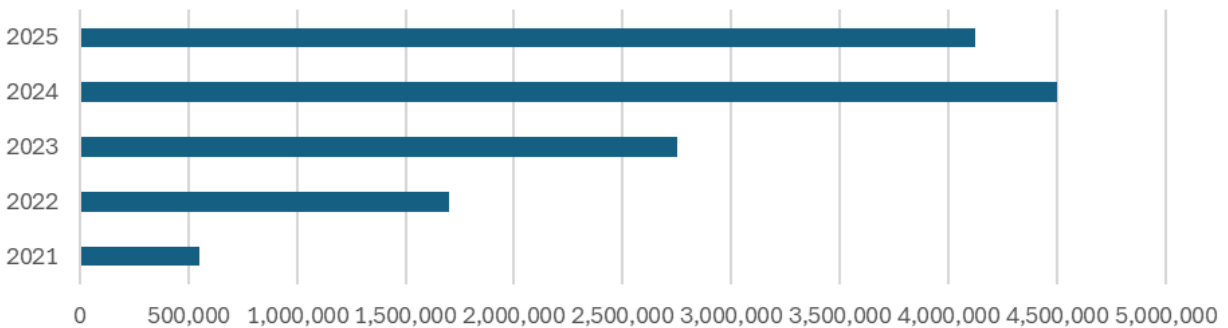
# 2025 Transit Statistics

**4.12 million tons.** The total volume of all Middle Corridor transit as recorded by Kazakh officials in 2025, a decrease of **8.4%** from the previous year, but an increase of **800%** since 2021.

**4 million tons.** The volume of cargo transported via Kazakh ships over the Caspian Sea in 2025, a **42%** increase from 2024.

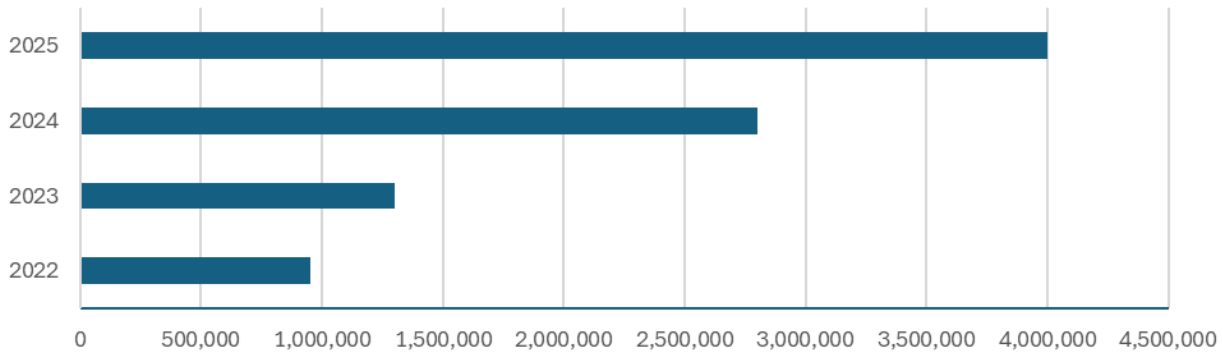
**76,900 TEUs.** The total twenty-foot equivalent units of traffic Kazakhstan reported transiting the Middle Corridor in 2025, around **1.5 times** more than the previous year.

Total Volume of Middle Corridor Transit (tons)



Data Source: Kazakh Officials as Reported in *The Astana Times*

Volume of Kazakhstan's Maritime Cargo (tons)



Data Source: Kazakhstan Bureau of National Statistics; Azernews

# Infrastructure and Soft Barriers

**The corridor consists of roads, railways, maritime transport including ports, and border facilities. The total capacity of the corridor depends on how efficiently goods can be transferred between different parts of the system.**

## Key Infrastructure Points

**Port of Poti:** One of Georgia's Black Sea ports, owned by the Dutch AP Moller Terminals. In 2025, it processed over 600,000 TEU shipping containers (80% of Georgia's containers). The Port at Poti is crucial as a last leg of the Middle Corridor bringing goods into Europe. Poti Trans-terminal, a joint venture between PTC Holding, a transport and logistics investment group from Kazakhstan, Azerbaijani companies INNOPRO JSC and Alliance Multimodal, and its Georgian partners, officially opened in August 2025. The terminal, built on 9 hectares, took \$31.5 million and two years to construct. It boasts 3.3km of railway, which can accommodate up to 120 railcars. It can currently handle 80,000 TEUs, but will be adapted to handle up to 200,000 TEUs.

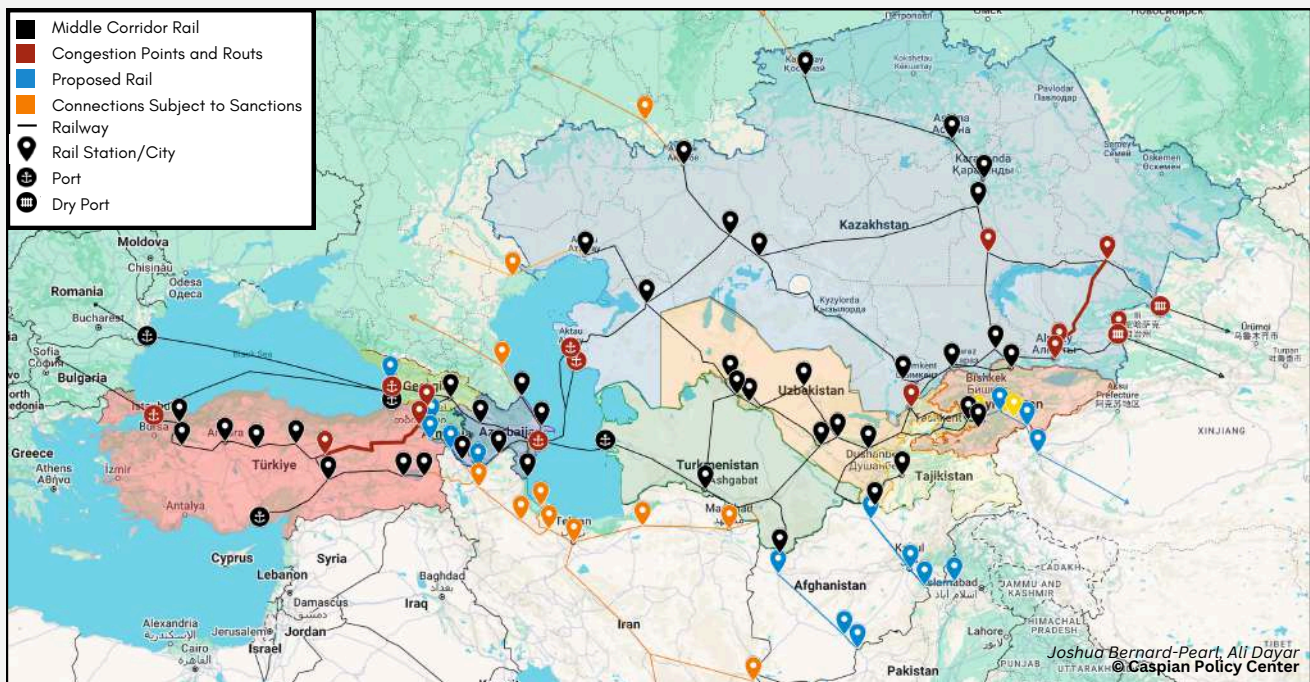
**Port of Batumi:** Georgia's second Black Sea port, operated by Kazakh oil company KazTransOil. In 2025, the port of Batumi processed 109,579 TEUs, 1.93 million tons of oil and petrol products, and 1.714 million tons of dry cargo. As of November 2023, the port of Batumi was operating at 22 percent overall capacity and 54 percent on the container segment.

**Port of Kuryk:** The port of Kuryk, located 50km south of Aktau, began operations in 2017. – It currently features a dry cargo terminal, a grain terminal, and an automobile ferry terminal, and construction is underway on an oil terminal, a transport and logistics center, and a production yard. Once completed, Port Kuryk's capacity is expected to reach 13.9 million tons.

**Port of Aktau:** Kazakhstan's older Caspian Sea port, Aktau, is also owned by National Railway Company KTZ with private capital participation. With three dry terminals and three oil terminals, the port has a throughput capacity of 15 million tons, or 140,000 TEUs. In June of 2025, the largest container hub (19.2 hectares) in the region became operational at Aktau, which is projected to increase the port's capacity by 100,000 TEUs. Aktau port can process 3.2 million tons of dry cargo and 12.5 million tons of oil each year. Kazakhstan's Ministry of Transport aims to increase the capacity of both Kuryk and Aktau from 21 to 30 million tons.

**Port of Baku:** The port of Baku is a pivotal point of entry for goods from Central Asia into the South Caucasus. The total volume handled by the port is 15 million tons and 150,000 TEUs, although there are plans to increase capacity to 25 million tons and 260,000 TEUs. Dredging and purchasing/upgrading of equipment will begin during the summer of 2026.

**China-Kyrgyzstan-Uzbekistan Railway:** This longstanding planned project would connect Kyrgyzstan, Uzbekistan, and China by a 454 kilometer rail line. Interest in this railway goes back several years, and while it appears that plans for the project are prepared, several stumbling blocks, including a lack of investment and disagreement between partners about investment responsibilities and potential pathways, have prevented construction. President of Kyrgyzstan Sadyr Japarov announced in March 2026 that the railway's completion is expected in 2030.

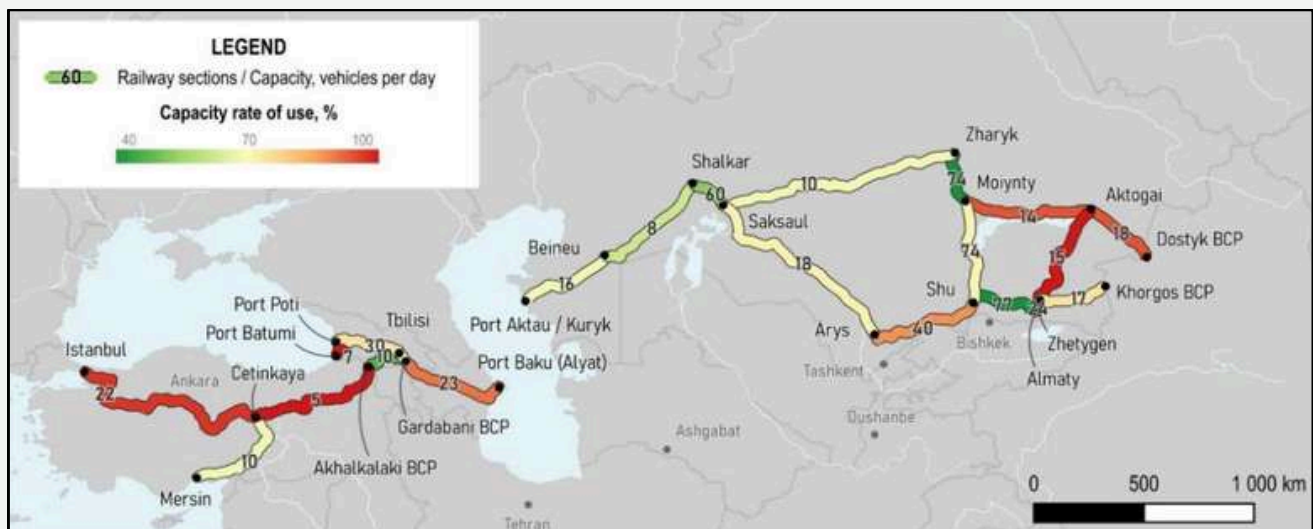


**Boyuk Kasik-Gardabani Railway:** This railway is responsible for the shipment of goods across the South Caucasus, from Azerbaijan over the border into Georgia. At present, this border crossing suffers from disparities between stations, weak sorting capacities, and a lack of an exhibition track layout. Furthermore, the fact that the border crossings are located in populated areas hinders further development potential.

**Khorgos-Altynkol Railway:** One of two Kazakh border crossings from China, the Khorgos-Altynkol railway is most significant as a point from which Chinese goods are brought into Kazakhstan before eventually being sent westward along the rest of the Middle Corridor. The border crossing has a daily throughput capacity of 17-18 trains, but it is limited by the fact that the Chinese portion of the crossing is made up of only two tracks as well as other infrastructural limitations. In 2025, over 16 million tons of cargo travelled via Khorgos-Altynkol.

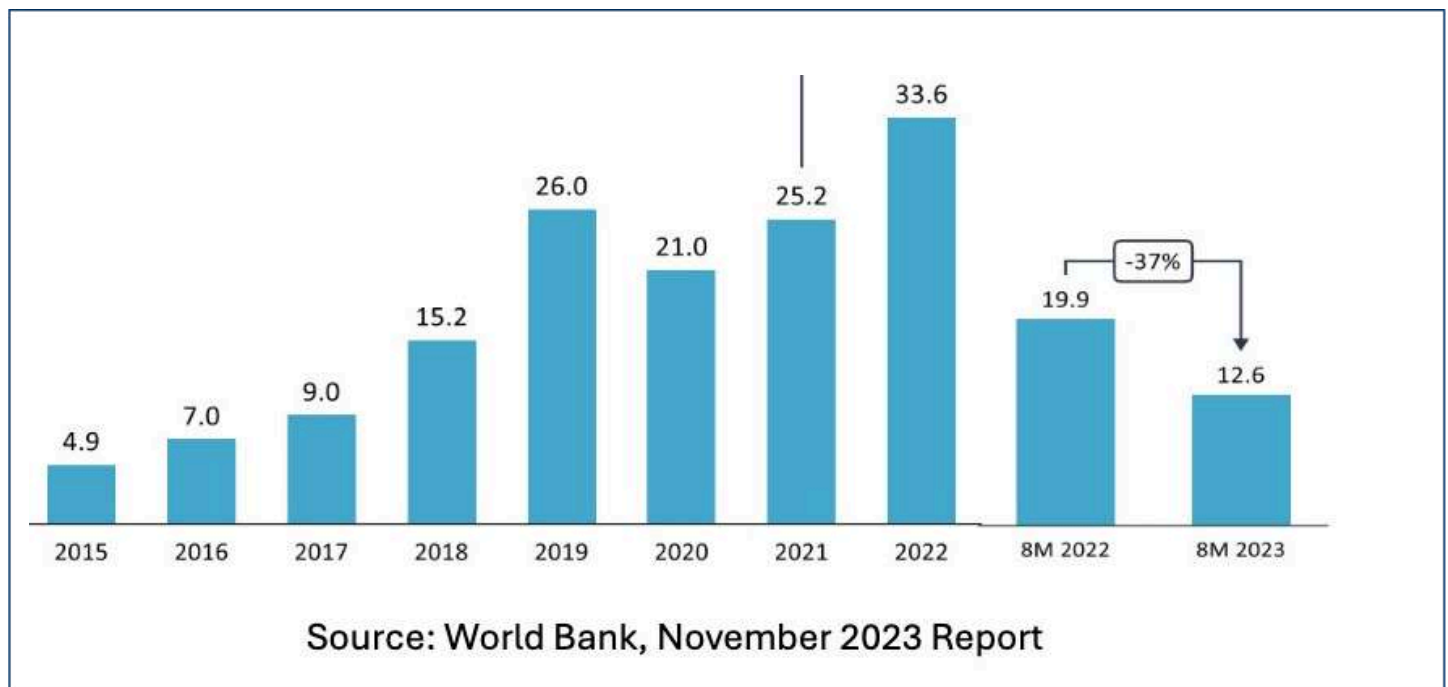
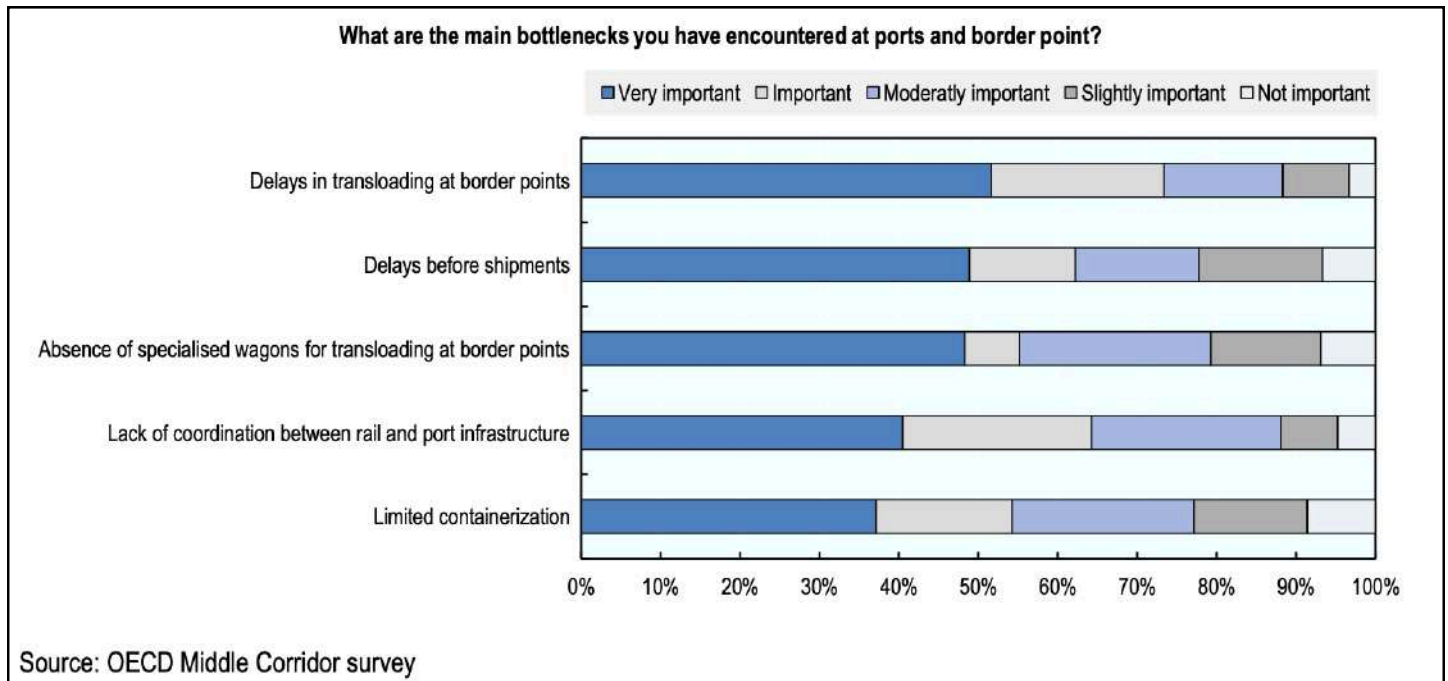
**Dostyk-Alashankou Railway:** The second crossing point between China and Kazakhstan, the Dostyk-Alashankou has a similar daily capacity, around 18 trains a day, which the World Bank notes is in serious need of expansion. At the moment, this crossing suffers from long wait times of around 60 hours. Reasons for this include a lack of sorting tracks, the absence of a unified automated arrival system and ineffective management of locomotives. By November of 2025, 17.8 million tons of cargo has traveled via Dostyk-Alashankou, or **6%** more traffic than in 2024.

**Port of Istanbul** - Also often called the Port of Haydarpaşa: for some cargo transported along the Middle Corridor, this is the final point of exit before arriving in Europe. Overseen by the General Directorate of Turkish State Railways, this port’s annual cargo in 2025 totaled **791,730 tons**, although it has a handling capacity of **1.913 million tons**, or **655,000 TEUs**. Kartsakhi-Cildir Railway is the border crossing connecting Georgia to Türkiye along the Baku-Tbilisi-Kars railway that allows for shipments of goods from the across the Caspian, through the Caucasus, and into Türkiye.



Source: World Bank, 2023

# Transport Delays and Unstable Transport Costs led to decreased container shipments via the MC after a surge in shipments following Russia’s invasion



# Infrastructure Priorities By Country



# Infrastructure Priorities in Kazakhstan



## Progress Points

- **Maritime expansion:** In January 2025, AD Ports, and Kazmortransflot signed a deal aiming to commission two new container vessels each with a capacity of over 500 twenty-foot equivalent units. In April 2026, Kazakhstan announced plans to build **twelve new vessels** on the Caspian sea by 2029. Aktau port doubled its container capacity between January and May 2024, and recently received \$45 million dollars of investment from the EBRD and EU to double capacity again to accommodate the increase in throughput.
- **Rolling stock expansion:** By 2029, Kazakh Railways (KTZ) plans to buy 574 new locomotives. KTZ also recently awarded \$4.2 billion to the American company Wabtec to produce 300 locomotives and awarded a tender to French company Alstom to produce the KZ6A New Freight Electric Locomotive by 2028.
- **Warehousing and distribution in multimodal logistics centers:** In January 2024, a new multimodal transport and logistics center opened at the Dostyk station on the Kazakhstan-China border and in December 2024, Eurasian Development Bank (EDB) and Eurasian Logistics Park LLP signed a \$31 million loan agreement for the construction of a logistics complex in the Almaty region, which launched in December 2025.

## Ongoing Priorities

- **Kyzylorda (Kazakhstan)-Uchquduq (Uzbekistan) Project:** In a 2026 report, the EU identified the route as a Priority 1 project for investment
- **Almaty-Khorgos Railway:** double tracking and electrification project, which the EU estimates will cost 1.2 billion EUR in total
- **Darbaza-Maktaaral Railway Project:** (KAZ-UZ) which the EU identified as a Priority 1 project in the 2026 report, will cost around 468 million EUR
- **Almaty Railway Station Bypass Project:** The project will reduce travel time for shipments, relieve Almaty station of cargo traffic by 40 per cent and provide job opportunities for around 2,000 people. Most stations along the bypass line are around 70%-80% finished and construction and will likely be completed in 2026
- **Shalkar-Beyneu Road Project:** Kazakhstan is searching for an investment of \$750 million from the World Bank for the project

# Infrastructure Priorities in Kyrgyzstan



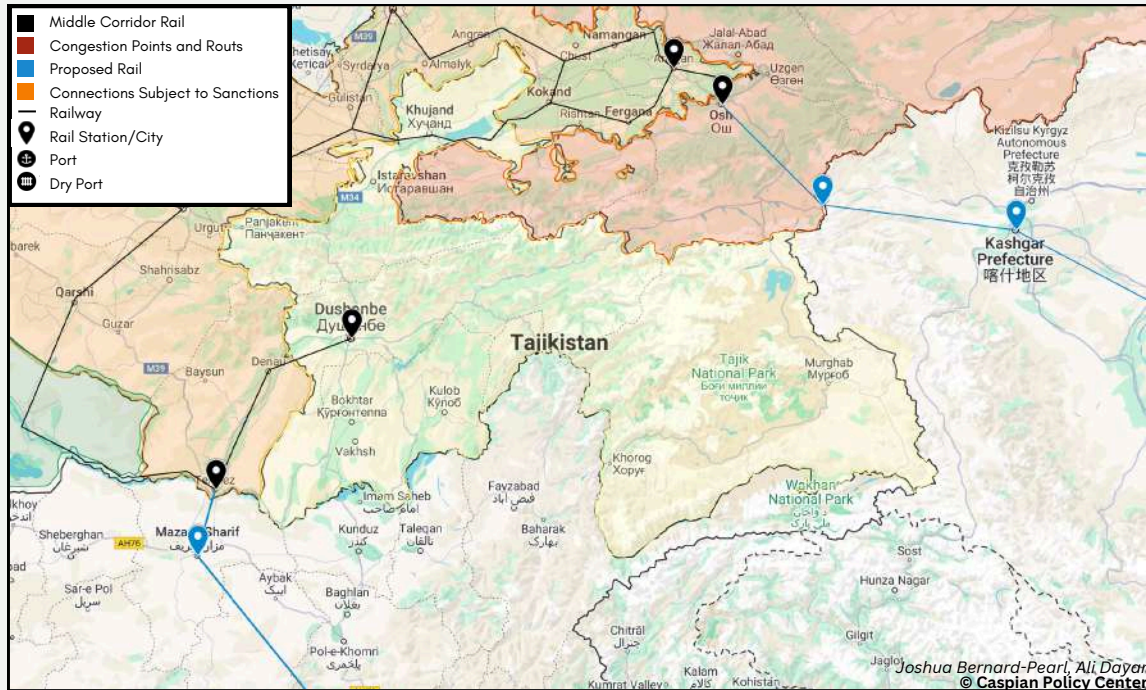
## Progress Points

- **China-Kyrgyzstan-Uzbekistan Railway:** In December 2024, China, Kyrgyzstan, and Uzbekistan signed an investment agreement to fund construction of the railway, which will span 533 km when completed and will cut travel time by around a week. Completion is scheduled for 2030.
- **Construction of the Balykchy-Makmal Rail Line:** Kyrgyz President Sadyr Japarov announced in August of 2024 that the project, part of the Uzbekistan-Kyrgyzstan-China rail line, had been completed.

## Ongoing Priorities

- The development and upgrade of the multi-modal logistics centers in **Osh and Alamedin**, identified by the EU 2026 report as a Priority 1 project costing around 68 million EUR
- **Electrification and Rehabilitation of the Balykchy-Lugovaya Rail Line:** The project will increase train speeds on the sections in question, identified by the EU 2026 report as Priority 1 project costing around 425 million EUR
- **Construction of the Torugart-Arpa-Makmal-Jalal Abad Railway Line:** The new line will support the country's transition to becoming a transit country, potentially increasing the railway's revenue from transit operations. The 2026 EU report finds that the railway would cut travel time by over a thousand kilometers, or a full week. It will cost approximately 4 billion EUR.

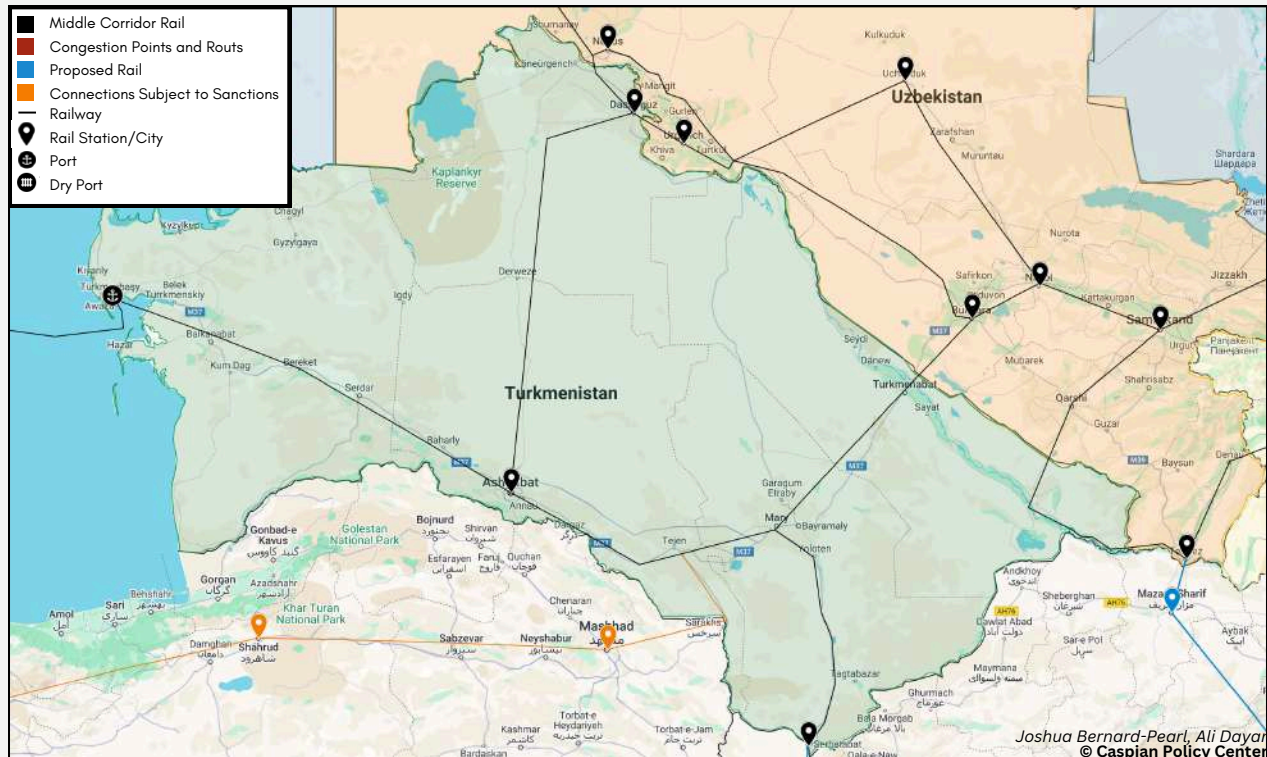
# Infrastructure Priorities in Tajikistan



## Ongoing Priorities

- **The development of an OSBP and a joint logistics centre in Fatehabad.** The project would include the implementation of an integrated border management system and the harmonization of digital systems. In addition to physical infrastructure development, the project would include the implementation of an integrated border management system and the harmonisation of digital systems. Equipment upgrades needs relate to the installation of X-ray devices and other smart inspection hardware to utilise more lanes and expedite service provision. The implementation of the project will reduce border-crossing delays and facilitate trade between Tajikistan and Uzbekistan, as well as transit trade. The project is expected to cost 18 million EUR and was identified by the EU 2026 report as a Priority 1 project.
- **The expansion of the existing northern railway line to the Sughd Economic Zone and northern parts of the region.** Expansion of the existing network towards the region will open up opportunities for producers in the region and increase agribusiness and other exports from the Sughd FEZ. Planning has begun for a railway between Spitamen (near the border with Uzbekistan) to Sughd.
- The priority infrastructure investment need relates to the **electrification of the northern railway section.** Tajik Railways is exploring projects to electrify the Vahdat-Pakhtaobod and the Kanibadam-Bekabad railway lines.

# Infrastructure Priorities in Turkmenistan



## Progress Points

- **Rehabilitation of the Turkmenbashi-Garabogaz road:** The road bridge will be partially opened in late 2025. The full 250 km highway, which will reach the border of Kazakhstan, will be completely finished in 2028 and will be able to accommodate 14,000 vehicles daily. There is a quadripartite trade agreement signed by Turkmenistan, Azerbaijan, Georgia, and Romania for Middle Corridor trade.

## Ongoing Priorities

- The development of a **logistics center at the Turkmenistan-Kazakhstan border**. Development of the first logistics centre at the Turkmenistan-Kazakhstan border would support more efficient operations at the border, reduce congestion, and lower transaction costs of the operators and service users.
- **Turkmenbashi-Gyzylgaya-Konye-Urgench road rehabilitation and reconstruction project:** This project represents a missing link that could save time and cost for carriers travelling to Nukus in Uzbekistan. It was identified as a Priority 1 project by the EU 2026 report and will cost 291 million EUR.
- **Expansion of the Uzen-Bolashak-Bereket line project:** This project would increase the capacity of the railway line between Bereket in Turkmenistan and Serkhetyskaya in Kazakhstan. It was identified as a Priority 1 project by the EU 2026 report and will cost 564 million EUR.

# Infrastructure Priorities in Uzbekistan



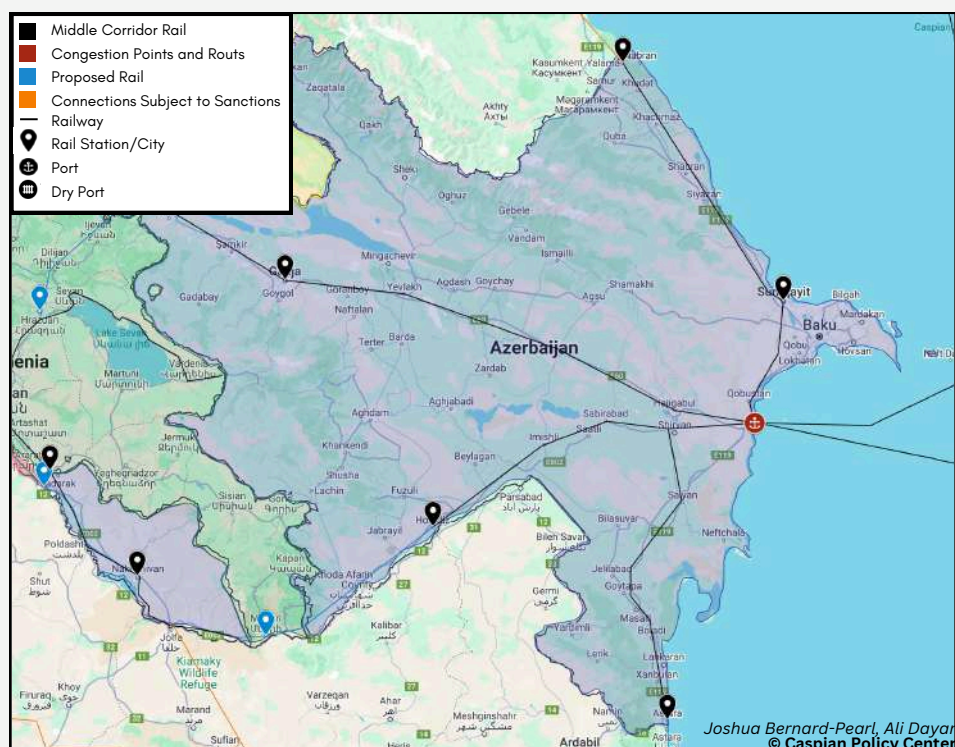
## Progress Points

- **Tashkent-Samarkand High-speed and Electrified Freight Railway:** A South Korean consortium has been contracted to work on the project and is currently conducting a feasibility study. The railway, constructed by South Korean company Saman Engineering, will be 282 kilometers long and will cut travel time by 25 minutes. The Korean Eximbank, which provided the grant, reported that the project will be finished by the first half of 2030.
- **Nukus (Uzbekistan)-Beyneu (Kazakhstan) Railway Reconstruction:** In August 2024, the Asia Development Bank announced that the first phase of the project was completed and that the railway's Sub-Project 2 was 37% complete. In August 2025, the ADB provided a loan of \$233 million to Uzbekistan, part of which will be used to upgrade the Nukus-Beyneu Road.

## Ongoing Priorities

- **The Oq-Kuprik Railway Station Capacity Enhancement:** There are currently four lanes in the station. The EU 2026 report identified this station as a Priority 1 project, and has assessed that two more lanes should be built, at a cost of 4.4 million EUR.
- **Expansion of the Railway Line into Namangan FEZ:** As the distance between the railway line and the Namangan FEZ area is very short (approximately 1 km), the new rail connection through the urbanised area would provide direct access to FEZ for shippers and would avoid urban congestion. The EU 2026 report places the project's cost at 49 million EUR.
- **Development of multimodal Logistics Centers and A-class Warehouses in Fergana Valley, Tashkent Region, Samarkand/Bukhara and Navoi:** These trade centres and logistic hubs have adequate road and rail connectivity, but lack the logistics facilities required for multimodal transport operations.
- **Uchquduq (Uzbekistan)-Kyzylorda (Kazakhstan) Road:** There is currently no direct route between these cities and the travel time is more than 16 hours by road.
- **Further Development of the Farap/Alat BCP and Reconstruction of BCP Approach Roads:** Farap/Alat is the main BCP between Uzbekistan and Turkmenistan.

# Infrastructure Priorities in Azerbaijan



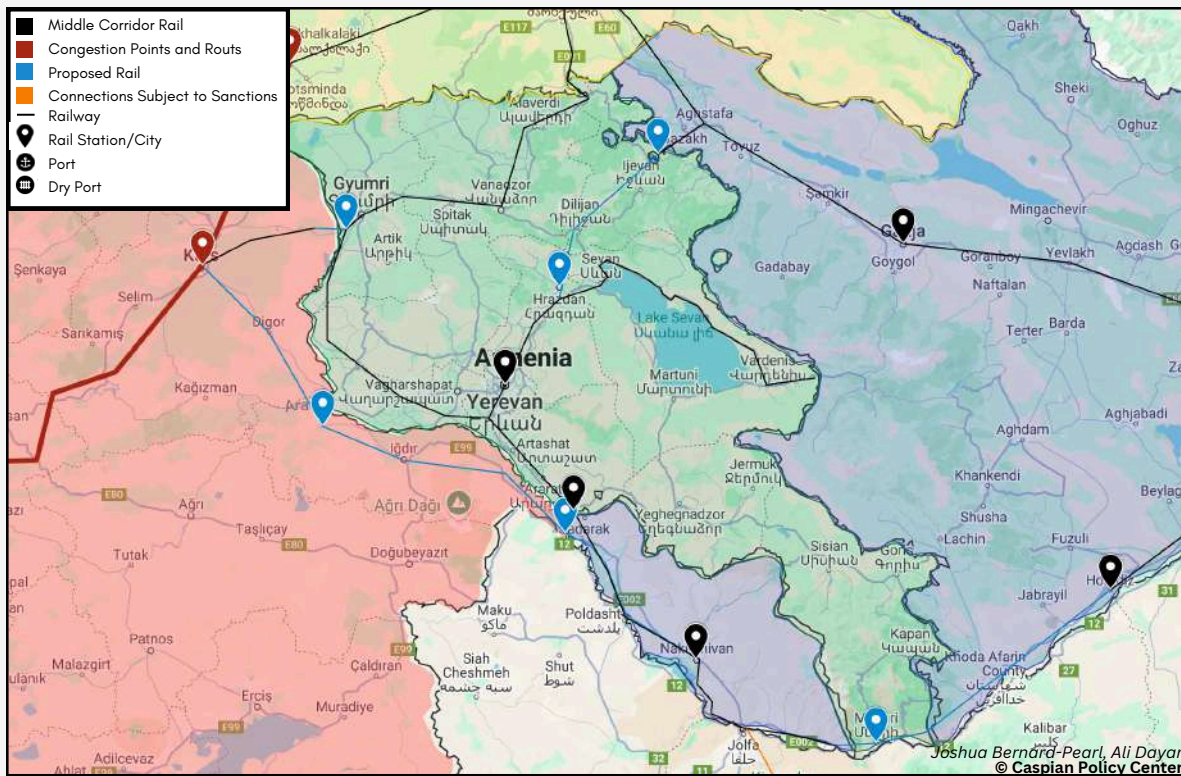
## Progress Points

- **Railway Sector Development Program:** In February 2024, officials from Azerbaijan’s ruling party announced that the Sumgayit -Yalama railway reconstruction was 80% completed, and in December 2025, electrification of the railway began. In April, Azerbaijan Railways further optimized the Absheron, adding an additional 61 trips per week to Baku-Sumgayit.
- **Grow Container Shipping Capacity on Baku-Aktau Route:** Port of Baku’s expansion will increase its shipping capacity to 25 million tons, including 500,000 TEU: In November, Azerbaijan, Kazakhstan, and China announced the construction of a new cargo terminal at the Port of Baku.
- **Rasht-Astara Railway Linking Azerbaijan and Iran:** In February 2025 it was announced that Russian experts would begin preparatory studies for the construction of the railway project in 2 months. Russia and Iran signed off on construction beginning in early April 2026.

## Ongoing Priorities

- **The Lapis Lazuli Corridor Project:** The project will connect Torgundi (Afghanistan) with the port of Turkmenbashi (Turkmenistan) and, via the Caspian Sea, to Baku.
- **Hajigabul-Georgian Border Motorway Expansion Project:** The project involves the expansion into a four-lane road of 184 km of dual-lane highway between Hajigabul and the Georgian Border in Azerbaijan.
- **Azerbaijan-Georgia-Romania-Interconnection (AGRI) LNG Project:** The project involves the construction of a LNG pipeline to supply LNG from Azerbaijan over the Black Sea to Romania and a regasification terminal at the Romanian port of Constanta.

# Infrastructure Priorities in Armenia



## Ongoing Priorities

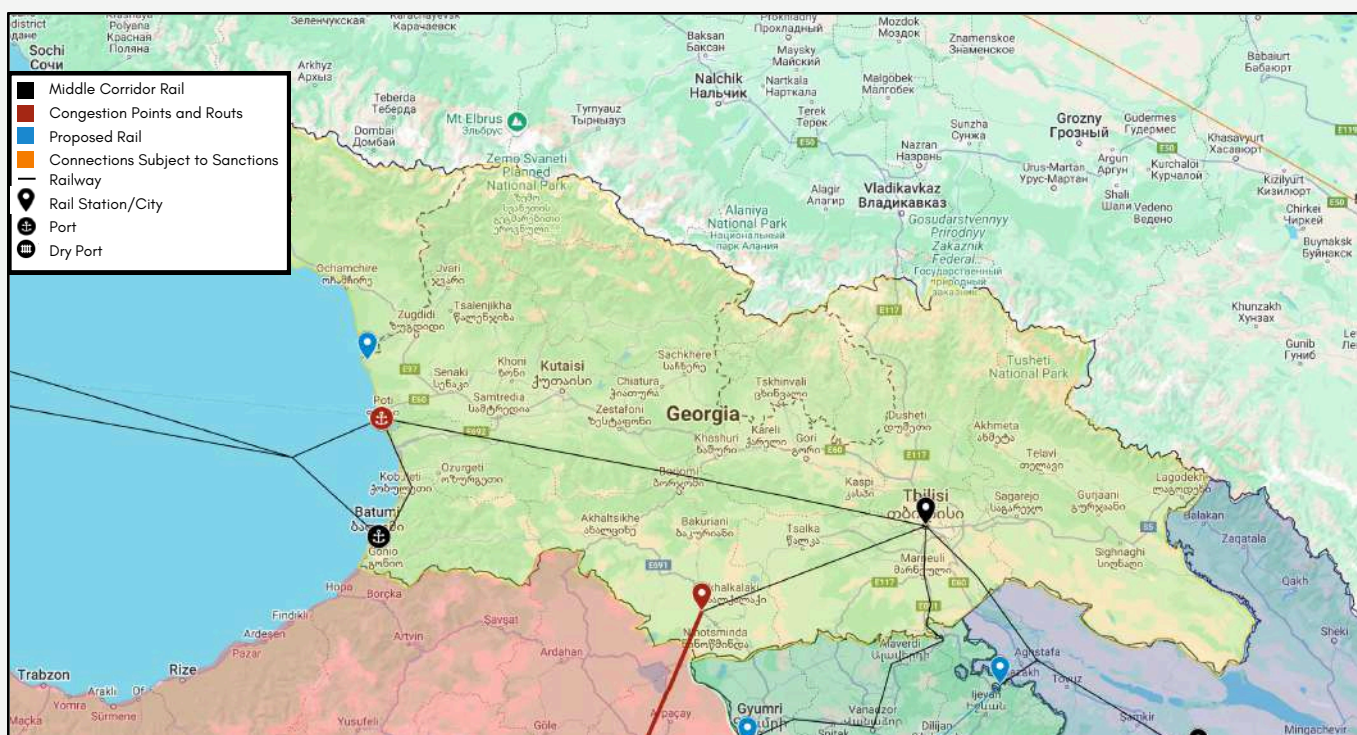
- **TRIPP Corridor:** Still in the development stage, the **27-mile** rail and road corridor will run through southern Armenia
- **Iran-Armenia Rail Link:** The railway will provide the shortest route from Georgia's Black Sea ports to the Persian Gulf by connecting Armenia's rail network with Iran's. Opposition leaders in Armenia recently supported the project, which Pashinyan is against.
- **North-South Corridor investment Program:** The project aims to modernize 93 km of road between Agarak and Bavra via Yerevan as well as customs infrastructure and related facilities. This will link the country's two open international borders with Georgia and Iran. An Armenian official stated that part of the corridor, Agarak to Kajaran, would reach 30% completion by the end of 2025.

## Future Possibilities

Under the '**Crossroads of Peace**' plan, Armenia hopes to

- Establish 7 new road infrastructure checkpoints on the Armenia-Azerbaijan border at Kayan, Sotk, Karahunj, Yeraskh, near Angeghakot and along the Armenia-Türkiye border at Akhurik and Margara.
- Restore four railway sections: Nradzor-Agarak (43 km), Hrazdan-Kayan (80 km), Yeraskh border of the NAR (1 km), Gyumri-Türkiye (6km)
- Establish 5 new checkpoints for railway infrastructure, four on the Armenia-Azerbaijan border and one of the Armenia- Türkiye border

# Infrastructure Priorities in Georgia



Joshua Bernard-Pearl, Ali Dayar  
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## Progress Points

- **Baku-Tbilisi-Kars Railway:** Azerbaijan Railways (ADY) and the Georgian railway company Marabda-Kartsakhi Railway announced the creation of a joint venture called BTKI Railways in August 2024. In recent years, after renovations to the line, the railway's cargo has increases annual cargo capacity from **around 1 million tons to 5 million tons**.
- **Anaklia Deep Sea Port:** In May 2024 Georgian authorities announced that a Chinese-Singaporean consortium led by China Communications Construction Company (CCCC) had won the tender for the construction of the long running Anaklia port project.

## Ongoing Priorities

- **The Kvesheti-Kobi Road Tunnel Project** is a vital part of the North-South Corridor in Georgia, which can eradicate winter traffic interruptions of Georgia's northern mountainous regions after completion. It consists of **23 km** of climate-resilient two-lane highways and an additional 5- km of all-weather access roads
- **Tbilisi Bypass:** Construction of a **55 km** stretch of four lane-roads. The project is part of Georgia's master plan for transport. The project was originally planned for implementation between 2018-2020 but has been delayed.

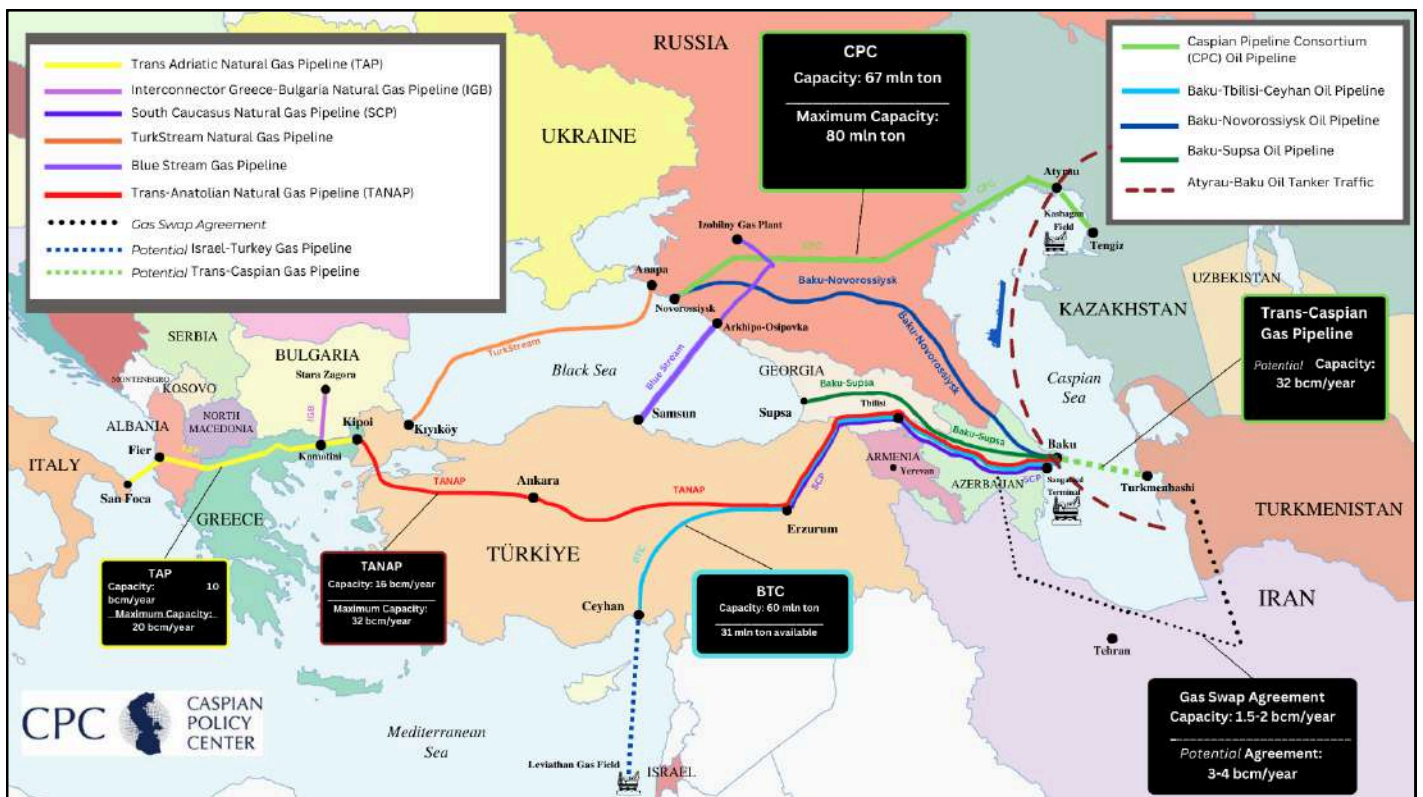
# Major Investments into the Middle Corridor

Source of Investment	Size of Investment	Significance
<u>Eurasian Development Bank (2024)</u>	\$3.5 billion	This investment will target diverse sectors but includes funds for transportation infrastructure.
<u>European Commission (2022)</u>	€2.3 billion	An agreement to fund a subsea electricity cable to transport electricity from Azerbaijan to several European countries.
<u>European Bank for Reconstruction and Development (2024)</u>	€1.5 billion	Part of January's EU Global Gateway Forum, this investment will fund overall transport connectivity in Central Asia.
<u>European Investment Bank (2024)</u>	€1.47 billion	Also under the umbrella of the Global Gateway Forum, this investment will launch and continue sustainable transport projects across Central Asia.
<u>CRRC Corporation (2023)</u>	\$1.3 billion	Improve rail-transport by purchasing 200 locomotives and establish engineering and service centers in Kazakhstan.
<u>AD Ports and Kazakhstan National Oil Company (2022)</u>	\$780 million	Joint venture to provide shipping services for energy companies and the format for investment around Caspian region and, expand the capacity to carry 8-10 million tons of crude annually.
<u>Semurg Invest (2023)</u>	\$100 million	As part of the Kuryk Port Development project, this investment will increase the port's export transport capacity to 15mn-20mn tones per year

Source of Investment	Size of Investment	Significance
<u>Azerbaijan (2023)</u>	\$140 million	Build-out of the Baku-Tbilisi-Kars railway which connects goods coming into Baku to Türkiye and on to Europe
<u>Belt and Road Initiative</u>	\$3.8 billion	China will invest \$3.8 billion into a variety of projects, including freight-rail and energy resource transit through the middle corridor.
<u>Azerbaijan Railways CJSC (2023)</u>	\$20.58 million	16 km of rails were replaced, 22 km of tracks were overhauled at the stations of Keshla, Bilajari, Yeni Surakhany-Surakhany, Yeni Surakhany-Hovsan, and the port of Zira was connected to the railway network for the first time.
<u>Wondernet Express</u>	\$20 million	The project aimed to construct a fertilizer terminal at Georgia's Batumi Port, allowing Central Asian fertilizers easier access to European markets. The terminal opened in 2021.
<u>Azerbaijan (2022)</u>	\$100 million	Upgrades to the Baku-Tbilisi-Kars rail line, which according to Azerbaijani officials is nearly complete, is set to increase the capacity of the rail line five-fold to 5 million tons annually.
<u>Turkish Albayrak Group (2022)</u>	\$20 million	In July 2022, Albayrak acquired the operating rights to develop the Port of Baku, following which, Albayrak took over Ro-Ro container and fertilizer terminal operations.
<u>Kazakhstan's Transport Ministry</u>	\$618 million	Investments into Kazakhstan's port of Aktau and Port of Kuryk will include dredging, the construction of a new fleet of transport ships, a new container hub, and improving port capacity.

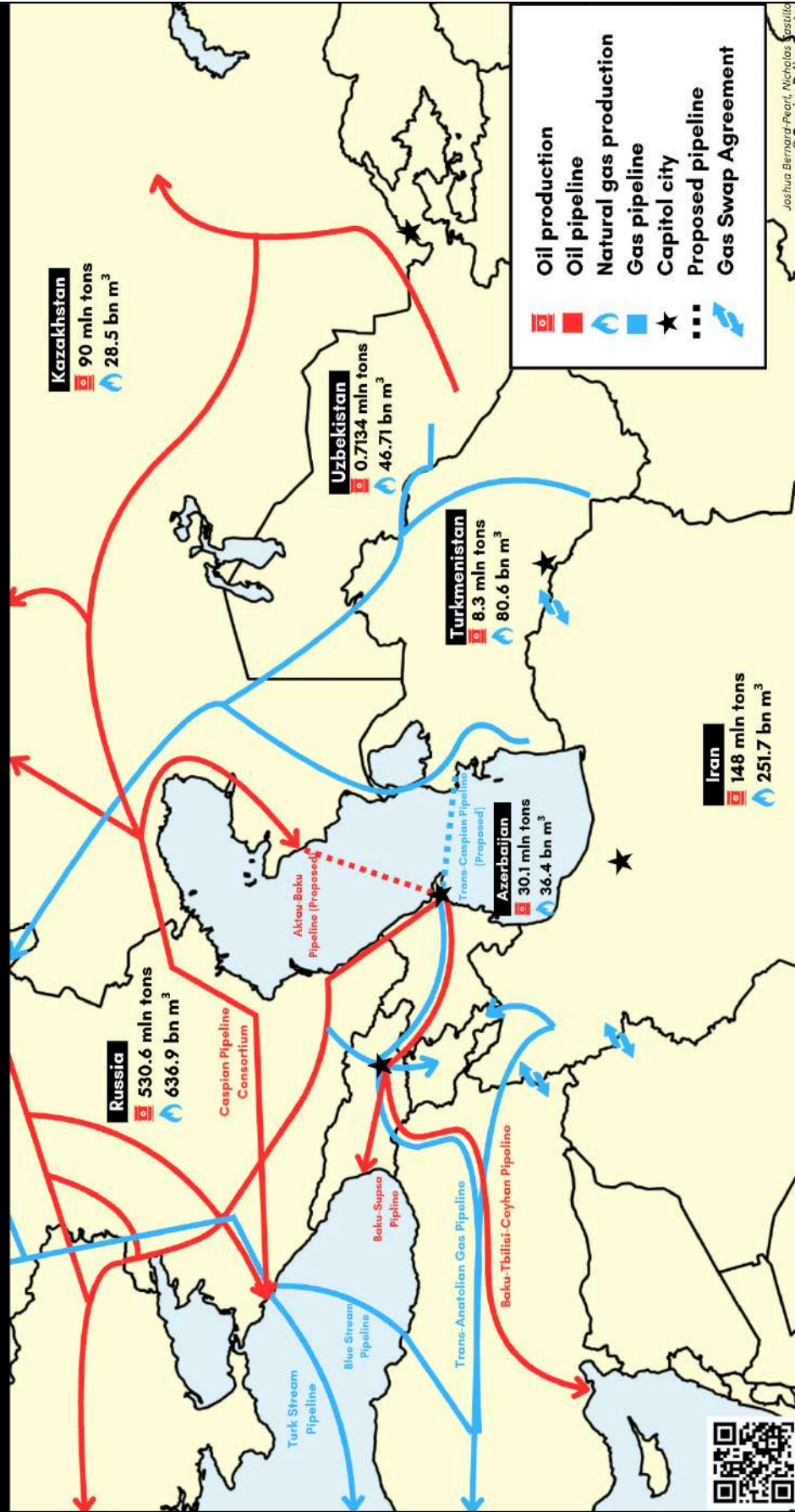
# Caspian Energy Infrastructure

While not officially part of the Middle Corridor, energy resources constitute a massive portion of East-West commerce. At CPC, we closely monitor energy developments and have provided the following maps to inform our readers on Caspian energy.



# Oil and Gas Production Figures and Pipelines in the Caspian Region, 2025

Major Pipelines Are Labeled



Joshua Bernard-Pearl, Nicholas Pasillo  
 @CaspianPolicyCenter

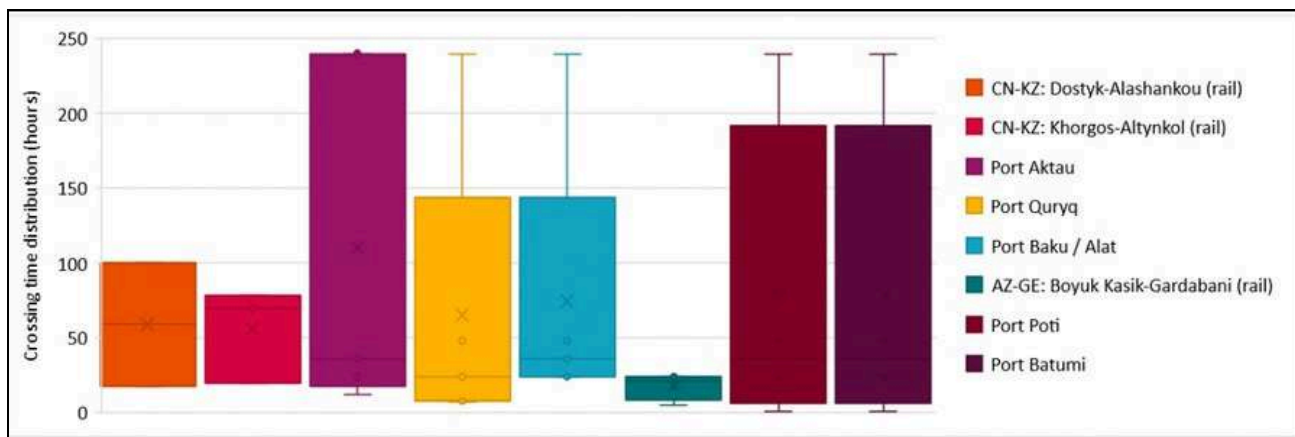


# Investment Priorities

**Enhancing the capacity and operational efficiency of the MC requires a significant focus on improving transport infrastructure and regional cooperation.**

**Customs harmonization:** Burdensome transit and trade procedures reduce the MC's efficiency and attractiveness to the private sector. When the CPC spoke with representatives from the U.S. Department of Commerce in recent years, they highlighted the "nebulous" and unharmonized license and permitting system for transporting goods via the MC as a major impediment to U.S. private sector participation. A regional approach is necessary to simplify the processing of goods, streamline customs inspections, and coordinate tariffs. There has been notable recent progress on this issue, with Organization of Turkic States member states adopting the eTIR digital customs system this year.

**Infrastructure capacity:** While Central Asian states, foreign governments, and multilateral development banks have invested in the MC's transport infrastructure, the OECD reported in 2023 that the "current level of transport infrastructure investment remains below projected needs" (OECD, 2023). The surge in traffic along the MC after Russia's invasion of Ukraine exposed several bottlenecks, particularly at Azerbaijan and Kazakhstan's Caspian ports and border crossing points. Congestion in these areas highlights the need for more investment, particularly in transshipment infrastructure, containerization, and loading equipment at ports.



Wait Time Survey Results, May, 2023

Source: World Bank, 2023

# EU Priority Action Items

In 2026, the EU released a report which identified priorities in the Greater Caspian Region to advance trade, transport, energy, and digital connectivity with Europe:

- Further construct rail lines through **Uzbekistan, Kyrgyzstan and Tajikistan**
- Improve and invest in infrastructure to support trade and transport in the **South Caucasus**
- Develop **Railway Modernization Project** in Georgia
- Promote **digitalization and secure digital corridors** within the region and **interoperability** between EU and non-EU systems
- Expand the capacity of the **Port of Baku**, identified by the World Bank as an integral hub of the Middle Corridor
- Support ongoing construction of the **Almaty Rail Bypass**
- Complete development of the **China-Kyrgyzstan-Uzbekistan Railway**
- Expand **Georgia's port at Poti**, which is currently at capacity, to have greater maritime handling capacity and improving its rural rail connectivity
- Across the Middle Corridor, it is important to improve trade facilitation, border management, and service delivery.

## World Bank Report on Middle Corridor Delays, 2023

■ = Area That Has Seen Notable Investment/Upgrades in 2024-25

Border crossing	Reasons for delays (+ - noted by respondents in open questions, ++ - noted several times by respondents in open questions)					
	Shortage of vessels or rolling stock	Congestion or infrastructure insufficiency, long handover of rolling stock	Control procedures, incl. customs	Problems with documents (insufficient digitalization)	Governance (corruption, monopolism)	Capacity shortage in China
CN-KZ: Dostyk-Alashankou (rail)		+	+			+
CN-KZ: Khorgos-Altynkol (rail)				+		+
Port Aktau	++ ■	+ ■	+		+	
Port Quryq	++ ■			++ ■	++	
Port Baku / Alat	++ ■	+ ■			+	
AZ-GE: Boyuk Kasik-Gardabani (rail)		+	+	+		
Port Poti	+	+ ■		+		
Port Batumi	+	+		+		
GE-TR: Kartsakhi-Cildir/Aktas (rail)		+ ■	+			
Port Istanbul	+	+		+		

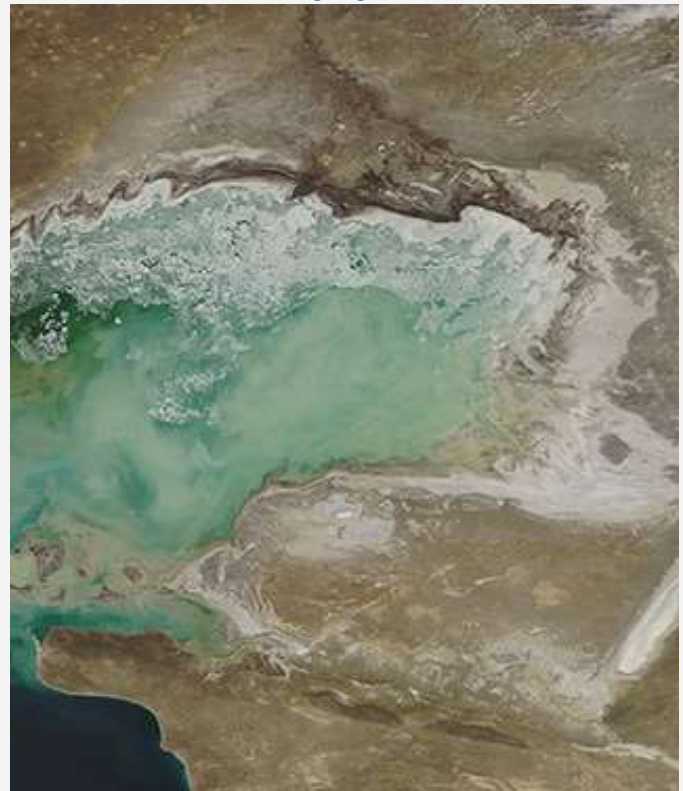
**“Railways provide relatively more consistent transportation times but have a large potential to reduce time via the Middle Corridor if bottlenecks are eliminated.” – World Bank, 2023**

**Climate Change:** The Caspian Sea, one of the world’s largest inland water bodies and crucial to the economies of five states, is itself experiencing an indisputable and accelerating decline in water levels, which will imperil local economies, quality of life, and regional commerce. If left unchecked, these desalination projects have the potential to exacerbate and accelerate the depletion of the Caspian Sea. Kazakhstan's Garysh Sapary National Space Agency revealed that Kazakhstan's portion of the Caspian Sea decreased by 7.1% from 2008 to 2023. Similarly, on May 29, 2023, RFE/RL's Turkmen service reported a 35-40 cm drop in water level along Turkmenistan's Caspian coast. A decline in Caspian Sea water levels will restrict the size of vessels that can sail in the Caspian Sea, thus aggravating congestion in the ports and the economic viability of trans-Caspian cargo services.

**2006**



**2026**

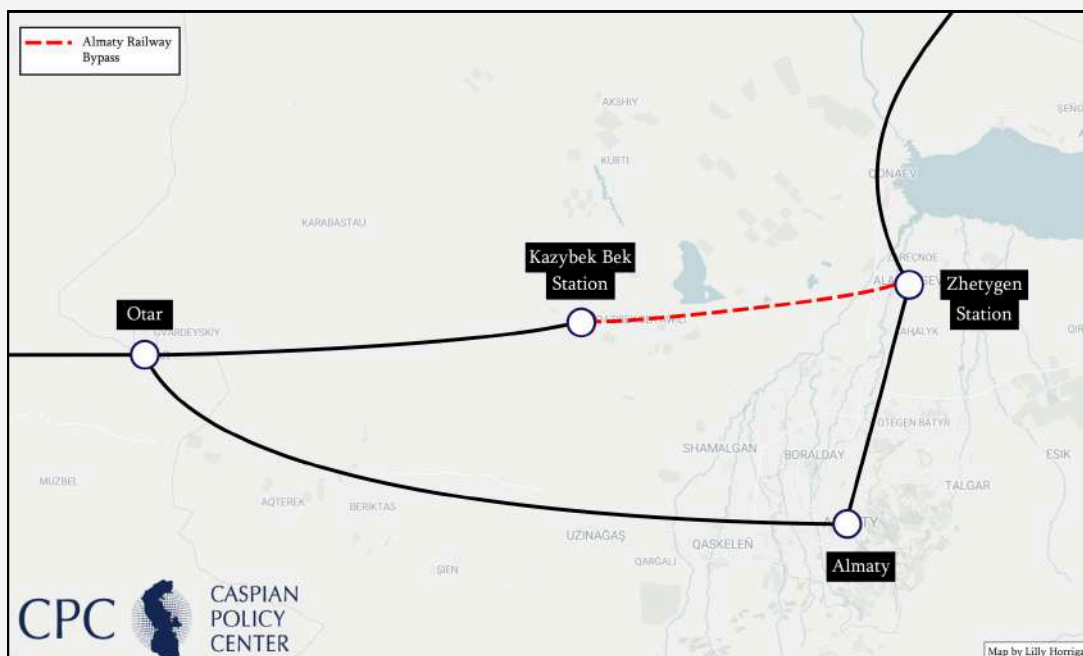


On March 13, 2026, the Moderate Resolution Imaging Spectroradiometer (MODIS) on NASA’s Aqua satellite acquired this natural-color image (right) of the northern Caspian Sea. For comparison, the left image was acquired by Terra MODIS on September 20, 2006.

The Caspian Sea level is the result of a certain balance between river inflows and evaporation, mainly; human actions also play a role, as well as possible tectonic movements. Some scientist project that by 2100, water levels in the Caspian Sea could drop by another 8 to 30 meters (26 to 98 feet). A decline in Caspian Sea water levels will, in turn, restrict the size of vessels that can sail in the Caspian Sea, thus aggravating congestion in the ports and the economic viability of trans- Caspian cargo services. In short, the invasion of Ukraine and the resultant reorientation of supply chains has highlighted the Caspian Sea’s importance at the time of its most vital challenge.

# Read More From CPC on the Middle Corridor

Cutting Friction, Not Just Distance: The Almaty Bypass and the Race to Make the Middle Corridor Competitive



By Lilly Horrigan

February 4, 2026

Recent funding for the construction of the Almaty Bypass Railway is set to accelerate Kazakhstan's growing role as a regional transit hub. By diverting freight traffic away from passenger rail corridors in Almaty, the bypass is expected to reduce congestion at the Almaty junction by 40% and shorten freight delivery times by up to 24 hours. This bypass is just one of Kazakhstan's many railway projects, creating new connections and modernizing existing routes to reduce congestion and shorten delivery times.

Read more at [caspiantpolicy.org](https://caspiantpolicy.org)



# Armenia and Azerbaijan Implement Peace: Next steps in Constructing the TRIPP

By Toghrul Ali and Jack Halsey

February 2, 2026



Arguably one of the most consequential elements of the Trilateral (Armenia, Azerbaijan, the United States) Peace Summit has just been expanded. Five months after the agreement's initialing, the Trump Route for International Peace and Prosperity (TRIPP) has started its initial implementation. Following a meeting between Foreign Minister of Armenia Ararat Mirzoyan and U.S. Secretary of State Marco Rubio, the TRIPP Implementation Framework (TIF) was released. Although the document has no legal standing, the TIF does provide a rationalization for the TRIPP's existence and how it will function.

## Corridors of Peace: How U.S. Strategy in the South Caucasus Can Rewire Eurasia

By Dr. Eric Rudenshiold

November 23, 2025

The peace agreement initialed at the White House between Armenia and Azerbaijan earlier in August represents more than the end of a long war. It opens a window of possibility that can transform decades of hostility into an era of cooperation, where shared infrastructure, trade, and technology can do what diplomacy alone cannot. If there is vision, it can translate peace on paper into peace in practice.

**Read more at [caspianpolicy.org](https://caspianpolicy.org)**



# 22 Days from Japan to Europe: East Asia's Middle Corridor Milestone

By Ali Dayar  
March 18, 2025



The Middle Corridor is no longer just an alternative trade route; it is becoming a key route in global trade. As this burgeoning route is thriving, its reach has now extended beyond China. The recent completion of Japan’s first successful transshipment to Türkiye using Middle Corridor infrastructure emphasizes this shift. Preliminary data indicates that the Trans-Caspian Middle Corridor reduces cargo transit time from Japan to Türkiye to just 15-20 days using the multi-modal, trans-continental route versus 45-60 days using sea lanes.

## Digitizing Customs: How eTIR is Transforming the Middle Corridor

By Ali Dayar  
February 5, 2025

Across the Trans-Caspian region there is an apparent need for a universal framework to digitize their customs procedures. By adopting digital customs measures, akin to those of the European Union (EU) and Eurasian Economic Union (EAEU), the countries of this crossroads region can streamline trade, reduce reliance on Russian transit routes, and capitalize on the growing flow of goods through the Middle Corridor. One such measure is the electronic implementation of the UN TIR (Transport International Routier) Convention (eTIR) system, which modernizes international customs procedures and facilitates the secure exchange of data between participating states.

**Read more at [caspianpolicy.org](https://caspianpolicy.org)**



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