THE FUTURE OF EURASIAN LOGISTICS: EXPANDING TRANSPORT NETWORKS ACROSS CENTRAL ASIA

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Abstract

In recent decades, Central Asia has emerged as a pivotal region in the transformation of Eurasian logistics. Geopolitical shifts, increased infrastructure investment, evolving global trade flows, and sanctions have accelerated the creation of new transport corridors, including the so-called Middle Corridor. This article examines the key trends shaping Eurasian logistics and outlines Central Asia's prospects as an integrated logistics hub.

Keywords: Central Asia, Eurasian logistics, transport corridors, Middle Corridor, China–Kyrgyzstan–Uzbekistan, geopolitics, infrastructure, transit potential, international trade, regional integration, logistics transformation, logistics hub, investment, sanctions, multimodal routes.

Introduction

Global logistics is undergoing a profound transformation. Disruptions in supply chains, geopolitical tensions, sanctions, and shifts in global demand are driving nations to seek alternative trade routes and new approaches to cargo transport. Within this context, Central Asia is no longer a peripheral player - it is rapidly becoming a strategic crossroads for trade between Europe, Asia, and the Middle East.

Infrastructure Momentum in Central Asia:

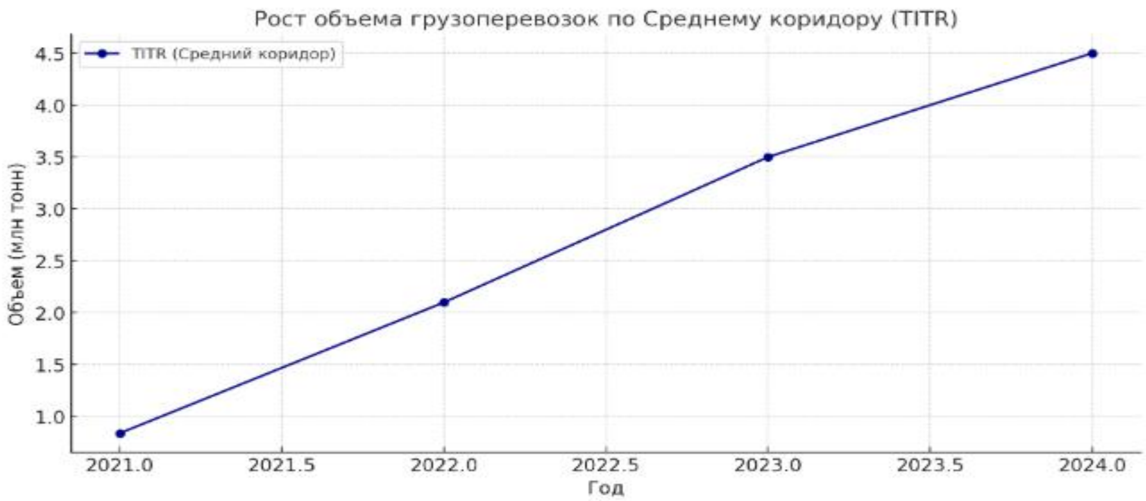
Countries across the region Kazakhstan, Uzbekistan, Kyrgyzstan, Turkmenistan, and even Afghanistan and Pakistan are ramping up the development and modernization of railways, seaports, and multimodal hubs. As global trade routes are being redefined, Central Asia is positioning itself as a vital land bridge connecting Europe and China, playing an increasingly central role in international logistics.

Middle Corridor (TITR): A Route of Rapid Growth

The Trans-Caspian International Transport Route (TITR), also known as the Middle Corridor, has experienced explosive growth - cargo volumes rose from 840,000 tons in 2021 to 4.5 million tons in 2024, a more than fivefold increase. Transit time has decreased dramatically from 38–58 days to 19-23 days making the route a competitive alternative to maritime transport via the Suez Canal. According to the EBRD, container traffic along this route could reach 865,000 TEU by 2040. Kazakhstan is heavily investing in infrastructure such as the Aktau and Kuryk ports and railways like Bakhty - Ayagoz and Dostyk - Moyynty. In 2023 alone, Kazakhstan's transit traffic rose by 21% to 29 million tons, with a goal of reaching 10 million tons via TITR by 2030.

China–Kyrgyzstan–Uzbekistan Railway: A Strategic Leap

The proposed China–Kyrgyzstan–Uzbekistan railway project is one of the most promising regional initiatives. It is expected to cut delivery times by 35–40%, reduce Uzbekistan's transport costs by 20–25%, and handle up to 8–10 million tons of cargo by 2030. This railway is seen as more than a route—it's a corridor of integration, providing Central Asia direct access to the Persian Gulf and the Mediterranean.



Trans-Afghan Corridor: A Southern Breakthrough

On July 17, 2025, Uzbekistan, Afghanistan, and Pakistan signed an agreement to construct a 760 km railway line running from Termez through Naibabad, Maidan Shar, and Logar to Kharlachi. The five-year project is valued at $4.8 billion. In its initial phase, the corridor will support 3 million tons of cargo, expanding to 20 million tons by 2040. The cost per container will drop from $900 to $286, while delivery times will shrink from 35 days to just 5.

Comparison of Central Asian Transport Corridors

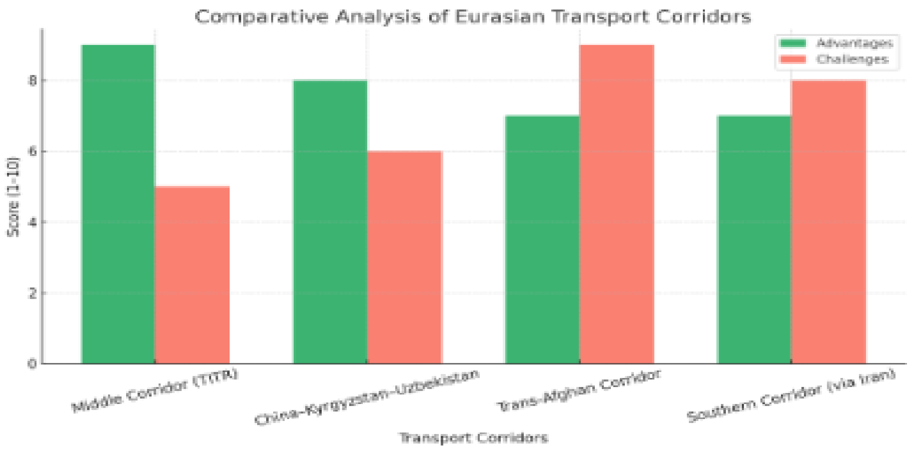
Corridor	Advantages	Drawbacks
Middle (TITR)	Rapid growth, port modernization	Casual weather conditions
China – KG – Uzbekistan	Shorter time and lower costs	Difficult terrain, investment risks
Trans–Afghan	Access to Pakistan, reduced transit times	Security, political instability
Southern (via Iran)	Access to the Indian Ocean	Sanctions risk, infrastructural bottlenecks

South Corridor (North–South): A Strategic Alternative via Iran and India

Freight traffic through Iran surged by 37% in 2024. The Port of Olya alone handled over 1 million tons, a 75% increase over the previous year. This corridor grants access to Indian Ocean ports and Gulf markets. Iran and Azerbaijan are also accelerating construction on the western branch of the route, particularly at the Astara border terminal. This eases dependence on congested Eastern European hubs and opens new logistical opportunities for Eurasia.

Uzbekistan's Multimodal Vision

Uzbekistan is prioritizing multimodal logistics solutions. In the first half of 2025, the nation transported 51.6 million tons by rail, up 2.6%. International freight reached 59.2 million tons in 2023, a 10.4% year-over-year increase, despite a continued trade imbalance. Strategic steps include the development of the Uzbekistan–Turkmenistan–Iran corridor, active involvement in TITR, establishment of logistics centers in Tashkent, Navoi, and Termez, investments in transit hubs, and the digitization of logistics processes.



Conclusion:

Central Asia is experiencing a true logistics shift. Projects such as TITR, the China–Kyrgyzstan–Uzbekistan railway, the Trans-Afghan corridor, and Iran's alternative routes are shaping a flexible, multi-vector, and resilient transport network. These initiatives are turning the region from a passive transit zone into a proactive player in global logistics. For sustained progress, the region must enhance coordination and procedural standardization, expand multimodal and digital logistics hubs, improve security (especially across Afghan routes), attract private and foreign investment, and rebalance trade flows. Future research should focus on scenario modeling under geopolitical risks, assessing corridor impacts on border economies, and evaluating environmental sustainability and the carbon footprint of logistics decisions.

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