China, Russia quietly moving toward a new Arctic axis

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Emerging Arctic route may ease Beijing and Moscow’s chokepoint risks while fragmenting global shipping into rival networks



By Frank Dumon

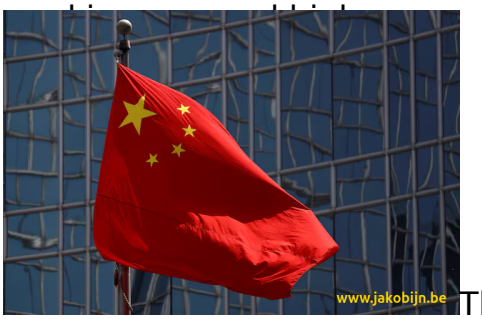
Russian President Vladimir Putin’s advisor Nikolai Patrushev’s recent visit to China points to something more consequential than another round of Russia-China strategic rhetoric: Moscow is trying to turn maritime cooperation with Beijing into infrastructure, technology and logistics that can survive geopolitical pressure.

> The proposals discussed during the October 8-13 visit — linking China's Maritime Silk Road with Russia's Trans-Arctic Transport Corridor, developing Russian ports, exchanging container-terminal automation technology and conducting joint maritime research — are still largely unimplemented plans.

Yet they deserve attention because they sit at the intersection of three trends reshaping the global economy: the securitization of supply chains, the opening of the Arctic and the fragmentation of maritime globalization. Patrushev's pitch was mostly commercial. Russia wants Chinese companies involved in the Northern Sea Route and related corridors, direct container links between Shanghai's Yangshan port and Russian ports, investment in terminals and Chinese digital expertise in port automation.

He also proposed cooperation in shipbuilding, maritime education and research. Beijing, for its part, described maritime cooperation as a "blue driving force" for bilateral relations. The economic logic is clear. China is Russia's biggest trading partner, and Moscow has become an increasingly important supplier of energy and raw materials to China. China's government data said two-way trade exceeded US$200 billion for a third consecutive year in 2025.

So maritime transport is becoming a strategic extension of the relationship, rather than just a means of moving cargo. And the Arctic adds a particularly interesting dimension to the partnership. Russia recorded 37.9 million tonnes of cargo traffic on the Northern Sea Route in 2024, including 3.09 million tonnes of transit cargo,



The numbers are tiny compared with the global flows of the Suez Canal, and the NSR is hampered by ice, high insurance premiums, specialized vessels, thin infrastructure and a short operating season. But the route's geopolitical and geoeconomic significance is increasingly hard to ignore. Reuters reported a Chinese container ship made a 20-day trip from China to Britain via the Arctic in October 2025, compared with some 40-50 days on traditional routes. That does not make the Arctic a substitute for Suez, but it does make it a potentially valuable second network.

For China, that distinction matters. Beijing has spent years building redundancy into its trade routes, ports and energy supply chains. A stronger northern corridor could

reduce exposure to chokepoints such as Suez, Bab el-Mandeb and Malacca while giving Chinese firms access to Russian Arctic resources and infrastructure.

For Moscow, Chinese capital, shipping demand and technology could help turn an ambitious Arctic strategy into a functioning logistics system. The geopolitical implications will no doubt be watched closely in Washington. The United States already regards the Arctic as an arena of intensifying strategic competition. In 2025, the US Coast Guard reported five China-affiliated research vessels operating in or near the US Arctic and increased its own patrols.

In 2024, it encountered a joint Chinese Coast Guard-Russian Border Guard patrol in the Bering Sea, the northernmost such Chinese Coast Guard presence then observed by the service. A Sino-Russian maritime network is not ipso facto a military alliance and Washington should not regard every commercial port project as a cloaked naval base. The more critical question is cumulative strategic resilience. Joint work on ports, digital systems, shipbuilding, research, navigation and logistics could enable China and Russia to develop maritime infrastructure with economic value in peacetime and strategic utility in a crisis.

Japan has even more reason to pay attention. Its security environment already includes increasingly frequent Chinese-Russian military activity around its territory, which Tokyo has explicitly highlighted. A more integrated Russian-Chinese maritime system stretching from Shanghai through Vladivostok and into the Arctic would complicate Japan’s strategic picture, particularly around the Sea of Japan, the Kuril Islands and the approaches to the Bering Strait. For Taiwan the significance is indirect, but perhaps greater. Beijing’s maritime pressure on Taiwan already includes naval activity, coast guard operations, legal measures and other gray-zone coercion. Taiwan’s defense ministry has cautioned that Chinese exercises are increasingly threatening a blockade and control of the island’s maritime approaches. Russia’s contribution to a broader Chinese maritime ecosystem may not in itself tip the balance in the Taiwan Strait, but it may encourage China to think that disruption in one theater need not cripple its broader trade and energy flows.

Over 80% of global goods trade is still carried by sea. UNCTAD forecasts a sharp slowdown in seaborne trade growth due to geopolitical disruption and rerouting of shipping from the Iran war and its associated Strait of Hormuz blockade. The Russia-China initiative is therefore part of a larger global movement toward securing vulnerable supply chains. There is an irony here. The two countries describe the project as a contribution to cheaper, safer and more stable trade. Yet the same process could deepen the fragmentation of the global maritime system into competing networks with different technologies, standards, financing channels and security arrangements.



That is why the least dramatic elements of Patrushev's proposal, which covers port automation, digital shipyards, research cooperation and common technical standards, are also its most important. They are the building blocks of 21st-century maritime power: whoever controls the software, data, equipment and logistics architecture of ports can shape trade without ever firing a shot.

The West should neither brush this off as Russian bombast nor blow it up into a Sino-Russian maritime bloc on the horizon. There are still considerable commercial barriers and Arctic shipping won't take over Asia-Europe routes any time soon. But South Korea's first commercial Arctic round trip in 2026, while cutting the time of the voyage, also exposed the route's unresolved problems with cargo volumes, ice navigation, insurance and fuel costs. Still, the direction of the Arctic route is clear. China supplies Russia with capital, goods and technology, while Russia offers China strategic geography. If the two can link these strengths coherently, they will create a parallel maritime system built for an age in which commercial efficiency and geopolitical security are increasingly indistinguishable.

Sources

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