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Can China's new Arctic sea route to Europe replace Middle East chokepoints?

Beijing's new 'Ice Silk Road' cuts through a melting Arctic, and could prompt new tensions with the US, analysts say.

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The Russian navy's missile cruiser Marshal Ustinov sails off for an exercise in the Arctic [File: Russian Defence Ministry Press Service/AP]

By Priyanka Shankar

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China has announced a new shipping route through the Arctic Ocean, which could ease the way for global trade amid the Middle East crisis that has paralysed critical waterways, including the Bab al-Mandeb Strait on the edge of the Red Sea.

Shipping companies have become increasingly interested in alternative trade routes through the Arctic in recent years as conflicts, such as the US war on Iran, restrict vital routes like the Red Sea and the Gulf.

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One answer may be China's new "Ice Silk Road", which begins at Ningbo on China's east coast, cuts through the Arctic Circle by running along Russia's Northern Sea Route and then heads south in the North Sea, terminating at Felixstowe in eastern England.

In recent weeks, the Bab al-Mandeb Strait, the key transit point to the Red Sea off the coast of Yemen, has become a no-go route for many ships as the Iran-backed Houthis target shipping linked to Saudi Arabia. That has disrupted traffic heading to and from the Suez Canal, the vital waterway connecting West Asia to Europe.

So could China's new shipping route be a sustainable alternative, and what would it mean for the balance of power in international trade?

Here's what we know:

Where is the new Chinese sea route through the Arctic?

Last week, the Chinese container shipping company, Sea Legend, which specialises in international trade with North Africa and Turkiye, formally announced the new route it has named the “Ice Silk Road” after China’s historic Silk Road route with Europe.

The company carried out a test voyage along the route last October. According to a report then by China’s Xinhua news agency, the voyage took 20 days, offering an advantage over other routes through the Suez Canal, which take about 40 days; or around the Cape of Good Hope in Southern Africa, which takes about 50 days.

Following the test run, Li Xiaobin, Sea Legend’s chief operating officer, said the new route is particularly suitable for heat-sensitive and time-critical cargo, such as lithium-ion batteries and photovoltaic products (which convert light into electricity using semiconductors) because of the low temperatures and relatively short distance.

China's new Northern Sea route through the Arctic

China is launching seasonal container services from eastern China to Europe via the Northern Sea route, which passes through the Bering Strait and along Russia’s Arctic coast. Transits from China to the UK could take 18–21 days, versus more than 40 days via Suez.

Source: Al Jazeera | August 17, 2026

Could this route offer an alternative to the Suez Canal?

Climate change has already caused significant melting of ice in the Arctic. While it poses new threats around the world, such as flooding and natural disasters, it has opened up new potential shipping routes.

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According to a July study published by researchers at Southampton University in the UK, between 2024 and 2025, “Arctic sea ice extent during the winter peak phase, from February to March, fell by 5.8 percent”, the “largest” drop on record.

However, there are a number of obstacles to establishing new freely available shipping routes there.

Winter ice impassable

While China’s new Arctic sea route could cut travel time from China to Europe in half, it is still only accessible during the warmer summer months of the Northern Hemisphere when there is less ice.

The route works as a seasonal supplement to other key shipping routes, Dylan Loh, an associate professor in the Public Policy and Global Affairs programme at Nanyang Technological University in Singapore, told Al Jazeera.

“The route is dependent on when the ice melts, which adds uncertainty,” he said, adding that shipping routes through the Arctic are also increasingly being criticised by green groups as contributing to further melting of the ice there.

Geopolitical risks and restricted access

Analysts also point to geopolitical issues likely to impact the route. China’s new “Ice Silk Road” cuts through Russia’s Northern Sea Route (NSR), which has been a key player in commercial shipping in the region for more than a decade.

Last year, however, only 23 container ships transited that route, up from 15 in 2024, according to shipping analysis from business insurer Allianz Commercial.

Permits to sail through the NSR are issued by the Northern Sea Route Administration (NSRA), an agency operating under the Russian state nuclear company Rosatom.

In 2017, vying to increase trade through the Arctic, China’s President Xi Jinping told Russia’s then-prime minister, Dmitry Medvedev, that China should jointly develop and use the NSR. But it was only after Russia’s war on Ukraine began in 2022 that Beijing gained more access to Russian trade routes.

William Yang, a senior analyst for North East Asia at the International Crisis Group, said: “Since Russia controls shipping through the NSR, China is, so far, the only country that can realistically use the route as an alternative to the Strait of Hormuz or the Suez Canal.”

“Given that almost all vessels that have used the NSR for shipping are Russian shadow fleets facing heavy international sanctions, sailing through the NSR could also pose political risks to other countries,” he told Al Jazeera.

How could the new route benefit China?

Yang said that if China could turn the NSR into an effective alternative to the Red Sea and the Suez Canal, that could create a unique economic advantage for Beijing and Chinese shipping companies during the ongoing disruption to global shipping in the Middle East.

“China could also use its increased commercial activities through the NSR to expand its presence in the Arctic region, a strategic goal it has harboured for decades.”

He added that, in reality, the prospect of the NSR becoming a universal international alternative to the Suez Canal remains limited. “But the possibility of China using it to deepen its foothold in the Arctic region is certainly rising.”

Why are Arctic trade routes opening up?

As the planet warms due to climate change, the vast untapped resources of the Arctic are becoming more accessible – as are shipping channels.

Countries such as the US, Canada, China and Russia are not only eyeing its resources but also its trade routes. Last year, US President Donald Trump made a major play for the acquisition of Greenland, which is believed to have vast, untapped rare earth metal resources, as well as being strategically positioned between North America and Europe.

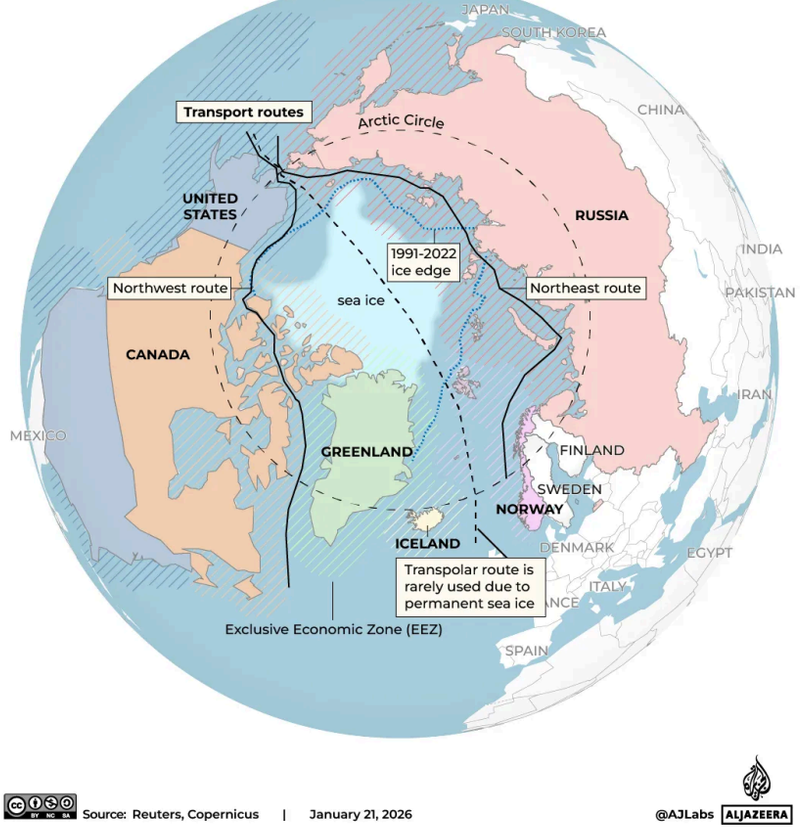
While Russia is hoping to ramp up commerce through the NSR by working with China to trade more with Asia than Europe due to Western sanctions, Beijing’s newly announced route is an alternative shipping route, which could reduce its dependence on the Strait of Malacca and trade routes in North Africa and West Asia.

Besides China and Russia’s trade routes, the Northwest Passage, which cuts through the Canadian Arctic, is predicted to be used more regularly in the near future to reduce shipping time from East Asia to Western Europe, according to the Arctic information and data portal Arctic Portal.

ARCTIC

Arctic shipping routes

There are three main routes that connect the Atlantic and the Pacific oceans: the Northeast Passage, the Northwest Passage, and the mostly unused Transpolar Sea Route.



Why are alternate trade routes needed?

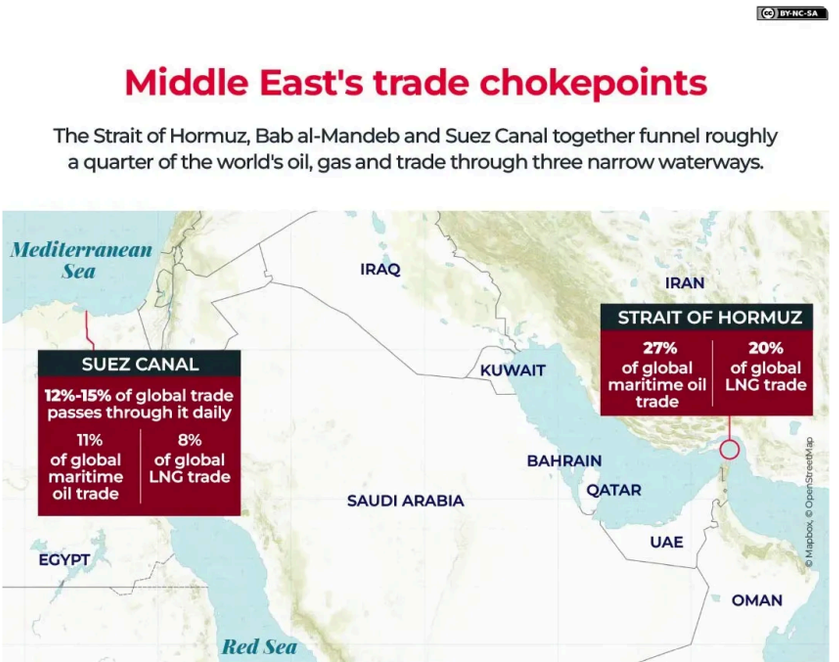
The US and Israel's war on Iran, which began on February 28, prompted Tehran to effectively close the Strait of Hormuz to almost all tankers, except for a few deemed by Iran to be "friendly nations".

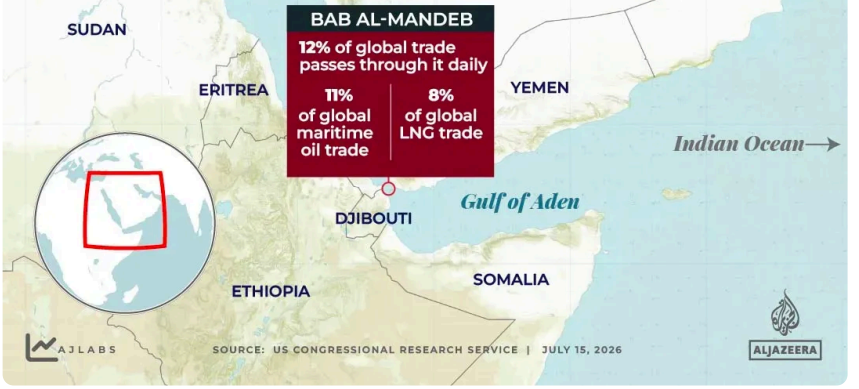
The strait, running through the territorial waters of both Iran and Oman, is one of the world's most important shipping channels, as it is the only route to the open sea for oil and gas producers in the Gulf. In peacetime, 20 percent of global oil and liquefied natural gas (LNG) exports are shipped through it. Besides energy, vital fertilisers and pharmaceuticals are also shipped out, affecting healthcare and agriculture sectors worldwide.

Also under threat is the Bab al-Mandeb Strait, which connects the Red Sea to the Gulf of Aden and ships more than 10 percent of the global oil trade.

In recent weeks, the Iran-aligned Houthis in Yemen have been launching strikes on Saudi-linked vessels entering or leaving the Red Sea. Bab al-Mandeb is the southern entry point to the Red Sea, which links the Suez Canal.

With these two vital straits disrupted, global trade and energy markets have been in crisis, with world leaders scrambling for solutions.





Could China's new route shift global trade power dynamics?

Speaking to Fox News earlier this month, US Secretary of State Marco Rubio projected the idea of a permanent geopolitical shift outside of the Strait of Hormuz.

He argued that regional states now understand that Iran, which insists it will not give up control of the strategically vital waterway, is an active threat, necessitating a massive realignment of how energy commodities flow to markets across the world.

But Singapore analyst Loh said that while countries such as China have been seeking alternative routes to direct the flow of commodities, they are unlikely to result in a shift in global power dynamics in international trade.

"China's route represents a hedge, not a complete pivot or true alternative for now, as it does not have the predictability that traditional sea routes have."

"It is an alternative, but we will need more time to observe how feasible it is from an environmental, financial and reliability perspective before we can make a conclusion. This development alone will not suddenly alter the global power dynamics," he added.

Alejandro Reyes, adjunct professor in the department of politics and public administration at the University of Hong Kong, however, argued that the geopolitical impact of the route could be much larger.

"China has been an observer in the Arctic Council since 2013, so its interest in the region is longstanding. Regular shipping gives that presence a more practical economic dimension," he told Al Jazeera, adding that this also brings the Arctic more directly into great-power competition.

The Arctic Council is an intergovernmental forum promoting cooperation, coordination and interaction between states bordering or in the Arctic. Its full members include Canada, Denmark, Finland, Iceland, Norway, Russia, Sweden and the US.

Reyes noted that with the Trump administration asserting US primacy across the Western Hemisphere, an expanding China-Russia corridor across the Arctic is expected to attract Washington's attention.

"There is also a European and NATO dimension," he pointed out, adding that seven of the eight Arctic Council states are NATO members. In February 2026, NATO launched a military mission called Arctic Sentry, aimed at curbing perceived threats in the region from Russia and China. "Europe could benefit from a shorter route to Asia, while at the same time becoming more dependent on a shipping corridor controlled by Russia," he said.

But Reyes does not expect the Arctic to replace Suez.

"It is only becoming another route connecting Asia and Europe, and another arena in the competition between China-Russia and the US and its allies and partners," he said.

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