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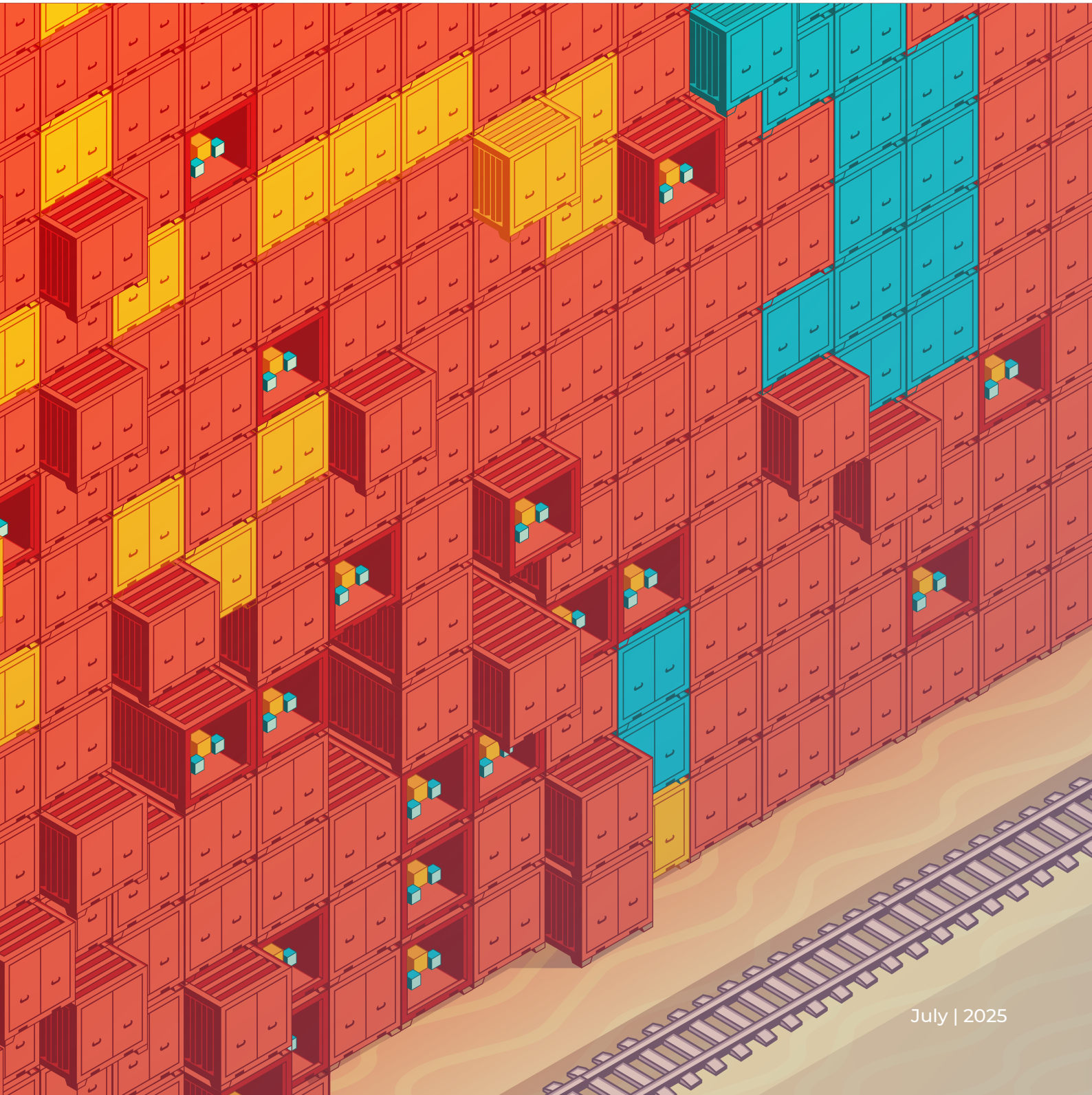
Report

TRENDS IN MUTUAL TRADE AND TRANSPORT LOGISTICS BETWEEN RUSSIA AND CHINA



July | 2025

Contents

Mutual trade between Russia and China 2

Trends in mutual trade 2

Reduction in key deliveries from China to Russia 4

Expansion and stabilization of containerized cargo exports 5

Logistics aspect of trade between Russia and China 6

Railway transportation 7

Sea freight 10

Road and air freight 13

Conclusion 15

MUTUAL TRADE BETWEEN RUSSIA AND CHINA

Trends in mutual trade

1. Exhaustion of the factor of reorientation of Russian trade due to sanctions

The decisive factor in the transformation of Russian-Chinese trade was the sanctions imposed by Western countries after the start of the special military operation (SMO) in 2022. Russia began to rapidly reorient itself eastward, especially by turning to China. Within two years, from the beginning of 2022 to the beginning of 2024, trade turnover increased 64%. This accelerated growth was a consequence of strengthening trade and economic ties. China has established itself as the main supplier of industrial and consumer products to Russia. At the same time, Russia managed to reorient supplies of its traditional export items from Europe to the Chinese market.

The results of 2024 demonstrated a gradual slowdown in trade growth. Exports to China amounted to $129.1 billion (+ 0.47% compared to the previous year), and imports increased to $ 115.5 billion (+ 3.96%). On the Russian side, the factor driving the slowdown in growth was the end of the period when the economy was adapting to new realities and when companies were reorienting to cater to eastern markets, including China. On the Chinese side, this is partly explained by internal factors, including a decrease in production activity and signs of market overheating, which affects the demand for Russian exports.

The beginning of 2025 has shown signs of stabilization with regards to mutual trade at existing levels. In the first four months of 2025, trade turnover decreased 7.5% (to $71.12 billion): Russia's exports fell 9% (to $ 40.31 billion), and imports fell 5.3% (to $ 30.81 billion). As for exports to China, the leaders in the decline were oil, oil products and gas (-29%), fertilizers (-16%), edible oils (-20%) and timber (-6%). At the same time, exports of copper (+ 91%), ores (+ 59%) and aluminum (+ 50%) increased significantly. Imports from China fell in the automobile and spare parts segment (-60%), but increased in industrial equipment (+9%), optics (+14%), ferrous metals (+26%) and organic chemicals (+15%). Deliveries from Chinese stores online increased 80%.

Given that raw materials predominate in Russian exports to China, the key factors affecting dynamics are the state of the Chinese economy and the situation on world markets. The main reasons for the decline in exports to China are related to the fall in the value of raw material exports (oil, coal, gas) due to lower world energy prices. In addition, China's stable GDP growth rates of 5.4% in the fourth quarter of 2024 and in the first quarter of 2025 reflect the macro trend of the Chinese economy's transition to more moderate growth. This is due to a gradual change in the economic model — from an export-oriented one to one that favors domestic consumption.

2. Stabilization of trade at current levels due to market saturation and internal economic development trends

After the period of substitution, the general state of the Russian economy and consumer sentiment became the key factors restraining Chinese imports. By the end of 2025, the level of mutual trade is likely to remain virtually unchanged, limited to individual fluctuations by product groups.

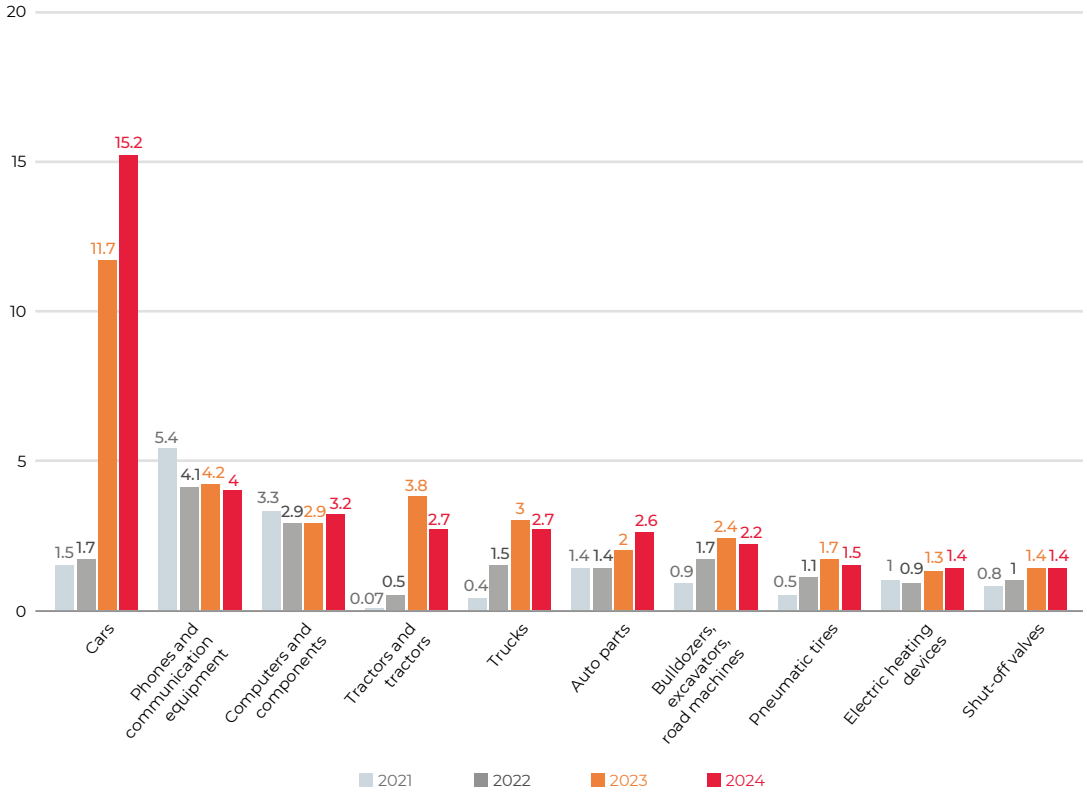
Imports to Russia reflect the general satisfaction of increased demand that arose due to the departure of Western companies and their products. A typical example is the import of cars. As of March 2025, the Russian market was oversaturated with Chinese cars. About 500,000 cars remained unsold. An additional restraining factor is the increase in the recycling fee from January 1, 2025 and the tightening of the import of cars through parallel imports. Analysts also predict continued stable demand for consumer goods from online stores, where Chinese suppliers dominate the market.

The high key rate in Russia puts pressure on demand for Chinese goods, limiting lending opportunities. An important restraining factor will be the general state of the Russian economy. In the first quarter of 2025, Russia's GDP contracted by 0.6% for the first time since 2022. The country's economy has gone into cooling mode.

Exports from Russia to China will depend on world commodity prices. A slight increase in the value of coal exports is likely, due to forecasted growth in global prices in the second half of 2025.

At the same time, the volume of Russian metal supplies to China is growing against the backdrop of limited access to the London and Chicago Mercantile Exchanges and the current EU quota for aluminum imports. According to the January-May 2025 results, export supplies to China have increased by 1.5-2.5 times.

DYNAMICS OF VALUE IMPORT VOLUMES TO RUSSIA FROM CHINA FOR 10 MAIN COMMODITY ITEMS IN 2021–2024, BILLION USD



Source: compiled by the authors based on ITC data

Reduction in key deliveries from China to Russia

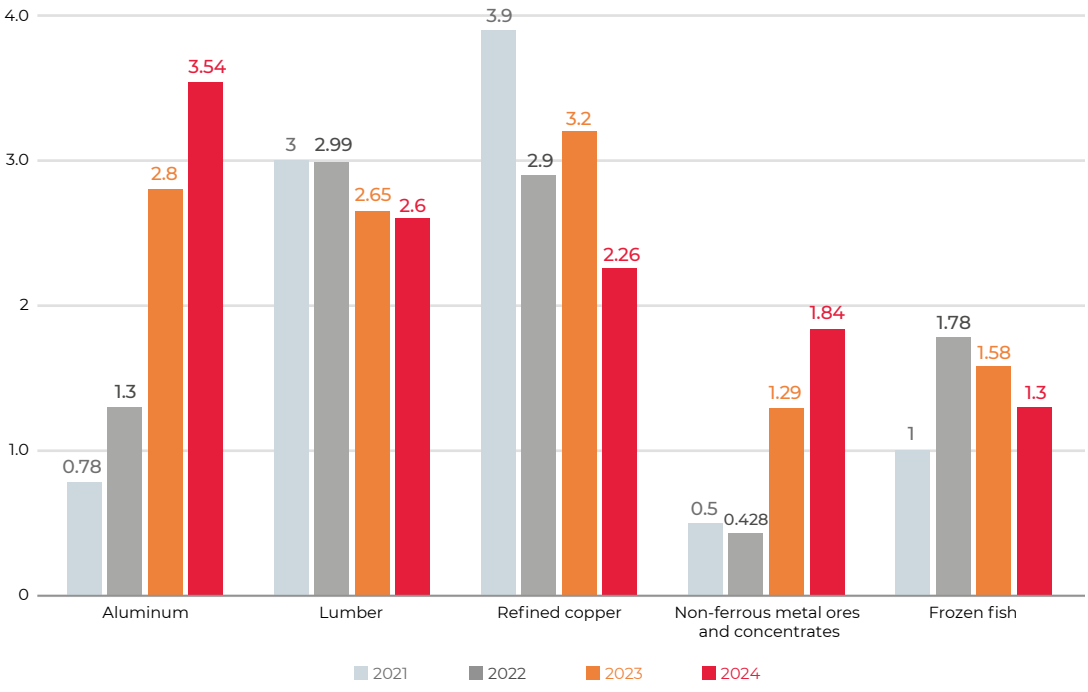
In 2025, the reduction in imports of passenger cars has had the main impact on the situation in the container market. Over the 2021–2024 period, it increased almost tenfold — from 1.5 to 15.2 billion USD. However, in the first five months of 2025, a decrease is observed: imports of cars and components fell from 8.8 billion to 4.2 billion USD (-52% compared to 2024).

At the same time, the industrial equipment segment has shown significant growth in recent years. Thus, the supply of tractors and trucks increased from $70 million in 2021 to $2.7 billion in 2024, and trucks — from $400 million to $2.7 billion in the same period. In 2025, the supply of industrial equipment increased 9% to $10.7 billion, maintaining the upward trend.

Other product groups have demonstrated mixed dynamics. Imports of telephones and communication equipment are declining: from $5.4 billion in 2021 to $4 billion in 2024; in January-May 2025, the overall electronics segment showed a decline of another 4%. Experts have attributed the drop in import volumes in the segment to the high key rate and difficulties in making payments to Chinese banks.

Over the period from 2021 to 2024, the volume of tire imports increased from $500 million to $1.5 billion, but in January-February 2025, a decline of 8.5% was recorded; this indicates market saturation after a period of intense growth.

DYNAMICS OF THE VALUE OF EXPORTS FROM THE RUSSIAN FEDERATION TO CHINA FOR FIVE KEY COMMODITY ITEMS IN 2021–2024 (EXCLUDING ENERGY RESOURCES), BILLION DOLLARS



Source: compiled by the authors based on ITC data

Expansion and stabilization of containerized cargo exports

As for containerized cargo, multidirectional trends were recorded at the end of 2024.

Exports of aluminum and its alloys demonstrated growth, from $1.33 billion in 2022 to $3.54 billion in 2024: this is due to the strengthening role of the Shanghai Exchange in trading Russian metal.

At the same time, supplies of sawn timber and refined copper decreased, while exports of precious metal ores and concentrates, on the contrary, increased significantly (+43.75% y/y, to $1.84 billion).

In recent years, there has been a noticeable decrease in the value of frozen fish supplies from Russia after they peaked in 2022 at a value of $1.78 billion (886.1 thousand tons). In 2024, the decrease occurred both in value ($1.3 billion, -21.5% compared to 2023) and in physical volume (1 million tons, -16% compared to 2023). This was due to Chinese regulatory factors and competition in the world market, primarily with suppliers from North America.

In 2025, it is possible that growth in Russia's export of copper and various ores exports will continue — this is due, among other things, to China's need to diversify supplies against the backdrop of the trade war with the United States. China is increasing its import of raw materials in response to the growing needs of its economy, taking into account the tightening of environmental standards.

Russian aluminum exports to its eastern partner may also grow due to EU sanctions and steady growth in demand in China. The main drivers are the development of green energy, the growth of electric vehicle production and the high capacity utilization rate of China's aluminum smelting industry (around 95%). In the long term, China's demand for aluminum is expected to increase by 2-3% annually.

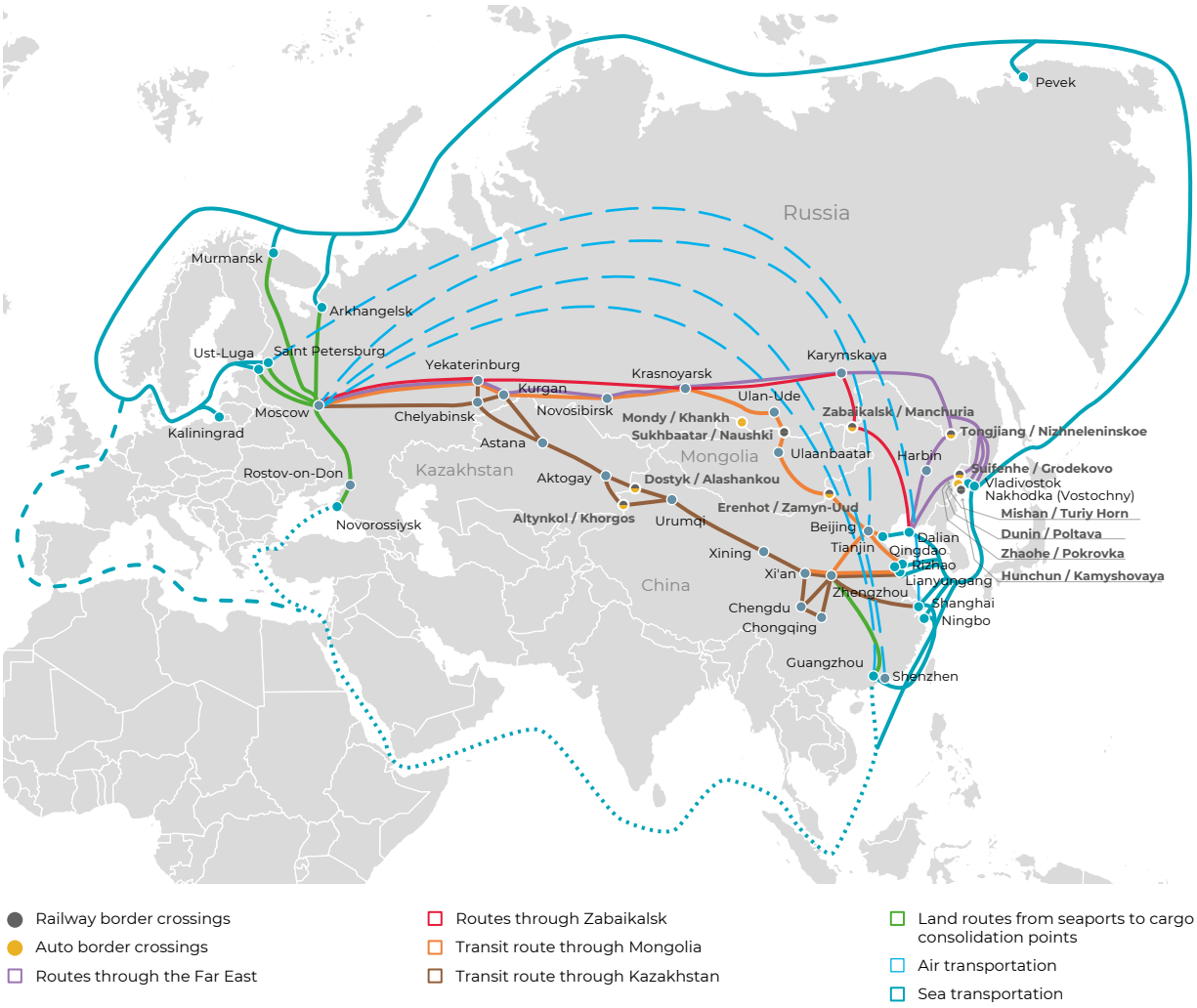
Demand for sawn timber is expected to revive despite its decline in 2024: at the beginning of 2025, the largest manufacturers have already noted an increase in business activity in the Chinese market. The main growth drivers will be measures to support China's construction sector.

LOGISTICS ASPECT OF TRADE BETWEEN RUSSIA AND CHINA

The delivery of cargo from China to Russia takes a variety of routes. Today, transportation is carried out by sea, rail, road and air transport. Each of these has its own characteristics, terms and cost. According to TeDo, the total cargo turnover China — Russia — China in 2024 exceeded 290 million tons: from Russia to China, the trade volume amounted to 265 million tons, in the opposite direction — 26 million tons. At the same time, container turnover amounted to 3 million TEUs. In the China — Russia direction, 1.8 million TEUs were transported, of which 41% of cargo was delivered by sea, 36% — by rail through border crossings and 22% — by road. The volume of exports from Russia to China amounted to 1.2 million TEUs: 24% of cargo — by sea, 56% — by rail and 18% — by road. According to some companies, at the beginning of 2025, there will be a decrease in container shipments from China to Russia by 8-9% compared to the same period last year. Such a decrease has been observed for shipments both through ports and through land border crossings.

The beginning of the year was also marked by a significant reduction in rates. The cost of delivery through the ports of the Far East varies within the range of about $3,800–4,400 per FEU (when providing a container by the carrier, COC), and when using shipper's containers (SOC) it is approximately $3,600 per FEU (current as of the beginning of July 2025). Against the backdrop of weakening demand and cheaper container rentals, a reduction in rail freight rates was noted: in June, they decreased by $300, amounting to an average of $3,750 per FEU (COC), while during the peak periods of 2021-2022, they reached $13,000-15,000 per FEU. These changes reflect current economic trends and the adaptation of logistics infrastructure to external economic factors.

OVERVIEW MAP OF TRANSPORTATION ROUTES CHINA — RUSSIA



Source: compiled by the authors

Railway transportation

Railway transport is a stable, reliable and fast way to deliver goods between China and Russia. Railway routes between the two countries demonstrated steady growth in 2024, despite foreign economic challenges. According to Russian Railways, the total volume of freight traffic with China in 2024 reached 175 million tons, an increase of 9% compared to the previous year. The beginning of 2025 was also marked by an increase in rail traffic: by 9.3% in January-February compared to the same period of the previous year — to more than 30 million tons.

Railway routes through the Russian Far East play a strategically important role in communication between China and Russia. It is in this region, where geographical proximity to the PRC is combined with an extensive infrastructure, that a significant part of foreign trade freight flows is carried out. According to the Far Eastern Railway, the volume of freight traffic with China in 2024 amounted to 19.2 million tons of freight, mainly exports — 18.2 million tons.

One of the key points is the Suifenhe — Grodekovo border crossing, located in Primorsky Krai. This crossing is consistently among the busiest: in 2024, 8.3 million tons of freight (+0.8%) were exported through it, including coal, metal ore, grain and fertilizers. Another operating crossing — Kamyshovaya — Hunchun — is also used primarily for the export of coal and mineral resources. In 2024, shipments through this border crossing exceeded the 2023 figures by 28.9% and amounted to 3.7 million tons. An important stage in the development of railway logistics was the opening of the Nizhneleninskoye-Tongjiang railway bridge in November 2022, the first bridge of its kind across the Amur. In 2024, the new crossing will see a 1.7-fold increase in deliveries abroad, to 5.4 million tons of cargo, mainly energy resources (primarily coal) and iron ore exported to China. In import traffic, there will be a seven-fold increase, to 64.9 thousand tons.

The average cost of rail transportation through the border crossings of the Far East is $3,750 per FEU, but in early June the rate exceeded $4,000 per FEU. This decrease is explained by weak demand and a decrease in rates for the provision of containers.

The Zabaikalsk-Manzhouli railway border crossing is the largest checkpoint between Russia and China. More than 50% of the cross-border cargo flow of the two countries passes through it. Over 11 months of 2024, 18.6 million tons of cargo (+6.5%) were exported through the Zabaikalsk-Manzhouli border crossing, including 6.7 million tons of coal (+25.9%) and 4.5 million tons of iron ore (+18.7%). According to the results of 2024, the Trans-Baikal Railway demonstrated an increase in transportation volumes of 3.5%. The average rate for the route from Shanghai to Moscow via the Zabaikalsk — Manzhouli border crossing, according to ERAI experts, is $3,600-4,250 per FEU (current as of early July 2025). This route is the shortest and fastest: the estimated average delivery time is 15-20 days.

According to China Railway Express, over 98.2 thousand TEUs were transported via the Far East border crossings, namely Suifenhe — Grodekovo and Nizhneleninskoye — Tongjiang, in the first 11 months of 2024, of which 74.8 thousand TEUs were in the eastward direction. Tongjiang demonstrated a 552.8% growth compared to the same period in 2023 and reached 16.2 thousand TEUs in export-import traffic, while westbound shipments via Suifenhe increased by 107.6% to 11.3 thousand TEUs. In turn, the volume of transportation via the Zabaikalsk-Manzhouli border crossing decreased by 13.8% to 429.7 thousand TEUs over the same period.

The beginning of 2025 was marked by an increase in rail transportation indicators through four Far Eastern border crossings. In the first five months of this year, export-import transportation via border crossings with China increased by 0.9% and amounted to 16.9 million tons of cargo, of which 15.9 million tons were in the export direction. The leader in cargo turnover was traditionally the Zabaikalsk — Manzhouli border crossing, through which 8.6 million tons (+1.2%) were exported. The Grodekovo-Suifenhe (3.7 million tons; +9.7%) and Nizhneleninskoye-Tongjiang (2.5 million tons; +14.3%) border crossings also demonstrated growth. Cargo turnover indicators through Kamyshovaya — Hunchun decreased by 35.2% compared to last year and amounted to 980 thousand tons of cargo. In turn, container turnover of the ports of the Far East is declining. In January-March 2025, Suifenhe-Grodekovo handled 10.3 thousand TEUs (-58.7%), and Nizhneleninskoye-Tongjiang — 2.4 thousand TEUs (-55.0%). The Zabaikalsk-Manchuria border crossing demonstrates more stable transportation indicators, although a downward trend is emerging: 107.9 thousand TEUs were processed in the first three months of 2025 (-11.6%), but in the eastward direction — 70.2 thousand TEUs (+5.6%).

The busiest transit route in terms of transportation volumes is the route through the Kazakh border crossings of Dostyk and Altynkol. According to KTZ, in 2024, more than 18 million tons of cargo were transported via Dostyk — Alashankou, and 13 million tons via Altynkol — Khorgos. Also, according to China Railway Express, container turnover at border crossings in Kazakhstan for 11 months of 2024 showed growth dynamics: 693.8 thousand TEUs (+38.6%) were transported via Dostyk-Alashankou, and 324,300 TEUs (+1.9%) via Altynkol-Khorgos.

It should be taken into account that the given indicators reflect the total volume of transportation through Kazakhstan's border crossings, including not only transit to Russia, but also deliveries to Central Asian countries and Europe.

In January-March 2025, the volume of container transportation via Kazakhstan shows a decline compared to the same period in 2024: 146.1 thousand TEUs were transported via Dostyk-Alashankou (-13.8%), in the western direction — 80 thousand TEUs (-19.3%); via Altynkol-Khorgos — 83.1 thousand TEUs (+12.8%), in the western direction — 42.3 thousand TEUs (-30.9%).

At the same time, the indicators of rail freight transportation at the beginning of 2025 are characterized by growth: in January-April 2025, the volume of freight transportation increased by 13% compared to the same period last year and reached 11.4 million tons. 6.2 million tons (+5%) were transported through the Dostyk border point, and 5.2 million tons (+24%) through Altynkol.

The multidirectional movement of container and total volumes of rail freight through Kazakhstan's border crossings in the first quarter of 2025 may indicate a structural shift in the composition of transported cargo. Despite the decline in container traffic, especially westbound traffic, the overall growth in tonnage (+13%) indicates an increase in the share of bulk, liquid and heavy cargo, such as coal, metals, and chemical products. This may be due to a change in the commodity nomenclature of exports/imports, as well as the transition of some container shipments to alternative routes.

The transit route through Kazakhstan is a popular railway route in China — Russia transit from the central and northwestern provinces of China. According to ERAI experts, the cost of transporting one 40-foot container from Xi'an to Moscow via the Dostyk border crossing is $3,150–3,400 per FEU, and via the Altynkol border crossing — $3,200 per FEU (as of early July 2025). On average, transportation from China to Russia via Kazakhstan by rail takes 18–25 days, and according to one of the major logistics operators — 20–35 days.

The rail transportation route from China to Russia via Mongolia is one of the key land corridors connecting Asia and Europe. The main points of departure of goods are the northern and central provinces of China. It runs along the Trans-Mongolian Railway, and the main border crossings are Ereen-Hoto (PRC) — Zamyn-Uud (Mongolia) and Sukhbaatar (Mongolia) — Naushki (Russia). In 2024, more than 8.5 million tons of cargo passed through the Naushki railway checkpoint.

According to ERAI experts, the average rate on the Chongqing — Moscow route via Mongolia is $3,350 per FEU, and on the Chengdu — Moscow route — $3,250 per FEU (as of early July 2025). On average, cargo sent from China to Russia via Mongolia is also delivered in 20–35 days. For example, in October 2024, the Chengdu — Moscow route via Mongolia was launched with a transit time of 28 days.

Table 1.

COMPARATIVE CHARACTERISTICS OF RAILWAY ROUTES FROM CHINA TO RUSSIA (MOSCOW)

Route	Border crossings	Delivery time	Average price
Far East	Suifenhe — Grodekovo / Tongjiang — Nizhneleninskoe / Hunchun — Kamyshovaya	16–21 days	3,750–4,050 USD per FEU
Zabaikalsky Krai	Zabaikalsk — Manchuria	15–20 days	3,600–4,250 USD per FEU
Through Kazakhstan	Dostyk — Alashankou / Altynkol — Khorgos	18–25 days	3,150–3,400 USD per FEU
Through Mongolia	Eren-Khoto — Zamyn-Uud / Sukhe-Bator — Naushki	20–30 days	3,250–3,350 USD per FEU

Source: compiled by the authors based on data from open sources

Sea freight

Sea transport remains one of the most popular ways to deliver goods from China to Russia. However, in the vast majority of cases, after delivery to the port, the cargo is then transported by other modes of transport. That is why sea freight from China to Russia is often considered an aspect of broader multimodal logistics.

The ‘gateways’ of Russia in overseas trade with China are the ports of the Far East (Vladivostok, Vostochny and Nakhodka). On average, the travel time from Shanghai to Vladivostok is 6-8 days. The cost of transportation, according to ERAI experts, ranges from $800 to $2,000 per FEU (current as of early July 2025) and depends on the distance, whether the client brings their own containers (SOC or COC), and other factors. After arriving at the port, the goods can be sent by rail to the central regions of Russia, including Moscow, which adds another 12-14 days to the total delivery time. According to ERAI experts, the cost of multimodal transportation through the ports of the Far East to Moscow is in the range of $3,800–4,400 per FEU (COC), and about $3,600 per FEU (SOC) if a container isn’t provided. Rates for transportation by rail, i.e. as part of high-speed container trains, are approximately $3,750 per FEU (COC; valid as of early July 2025).

By the end of 2024, the cargo turnover of the ports of the Far Eastern basin had decreased to 236.5 million tons (-2.3%). The most noticeable decrease was in the port of Vanino — 29.3 million tons (-16.2%). At the same time, the port of Vladivostok demonstrated a noticeable increase in cargo turnover, by 11.7% (37.4 million tons). Container turnover in 2024 was characterized by growth of 5% and amounted to 2.7 million TEUs (+119 thousand TEUs). The volume of container handling with cargo arriving from abroad in the ports of the Far Eastern basin increased significantly — by 20% compared to the same period last year, amounting to 1.24 million TEUs, which is equivalent to an increase of 209 thousand TEUs. Exports decreased compared to 2023 by 6%, or by 46 thousand TEUs, and amounted to 690 thousand TEUs. The turnover of the port of Vladivostok at the end of 2024 increased by 8%, or by 126 thousand TEUs, year-on-year — to 1.7 million TEUs. About 63% of the container turnover of the basin is accounted for by the port of Vladivostok.

The ports of the Far East basin, especially the Vladivostok Commercial Sea Port (VCSP), play an important role in China-Russia logistics. In 2024, the port updated its own record for annual container turnover, handling 879 thousand TEUs. In addition to China, cargo is sent to South Korea, Japan, Vietnam, India and other countries in Southeast Asia. According to VCSP, of the total volume of international cargo turnover of VCSP, the ports of China account for about 70% of container turnover.

In April 2025, container turnover of the ports of the Far East basin decreased by 13% compared to the previous month, the most noticeable decline in a year. According to InfraNews agency, this decline is due to the reorientation of part of the cargo flows to the ports of the Baltic basin. As noted in the publication, the container import turnover from January to April decreased from 100 thousand TEUs per month to 70 thousand TEUs per month.

An alternative sea route is the route through the Suez Canal to the ports of the Baltic Sea (St. Petersburg, Ust-Luga, Kaliningrad). The delivery time of goods from Ningbo, Shanghai, Lianyungang and Qingdao takes 38 days on average. The cost of transportation starts from $ 4,500 per FEU (SOS; valid as of the beginning of July 2025). This route is popular among suppliers to the European part of Russia. At the same time, goods from St. Petersburg can be sent to any point in the country thanks to the developed infrastructure. For example, transportation by road from St. Petersburg to Moscow is estimated at $ 1,015-1,585 per FEU and takes one to two days, and by rail — $ 480 per FEU. A similar route from Chinese ports to Kaliningrad will cost the cargo owner $5,000–7,250 per FEU (as of early July 2025), and the travel time will be 50 days.

In 2024, the cargo turnover of the Baltic Basin ports amounted to 273 million tons of cargo (+0.6%), and the largest increase was at the Big Port of St. Petersburg: 52 million tons (+6.9%). According to the results of 2024, container turnover increased significantly (+34%), exceeding 1.6 million TEUs, which is 419 thousand TEUs more than a year earlier. Exports increased by 42% to more than 693 thousand TEUs, imports — by 20% to 594 thousand TEUs. The leader among ports in terms of container handling volumes was the Big Port of St. Petersburg — 1.37 million TEUs (+37%).

In April 2025, container turnover of the Baltic Basin ports increased by 10.1% compared to April 2024. As noted earlier, the reason for this growth is the reorientation of cargo from the ports of the Far East, and in this context, the growth in import volumes by 24.8% over the analyzed period is indicative.

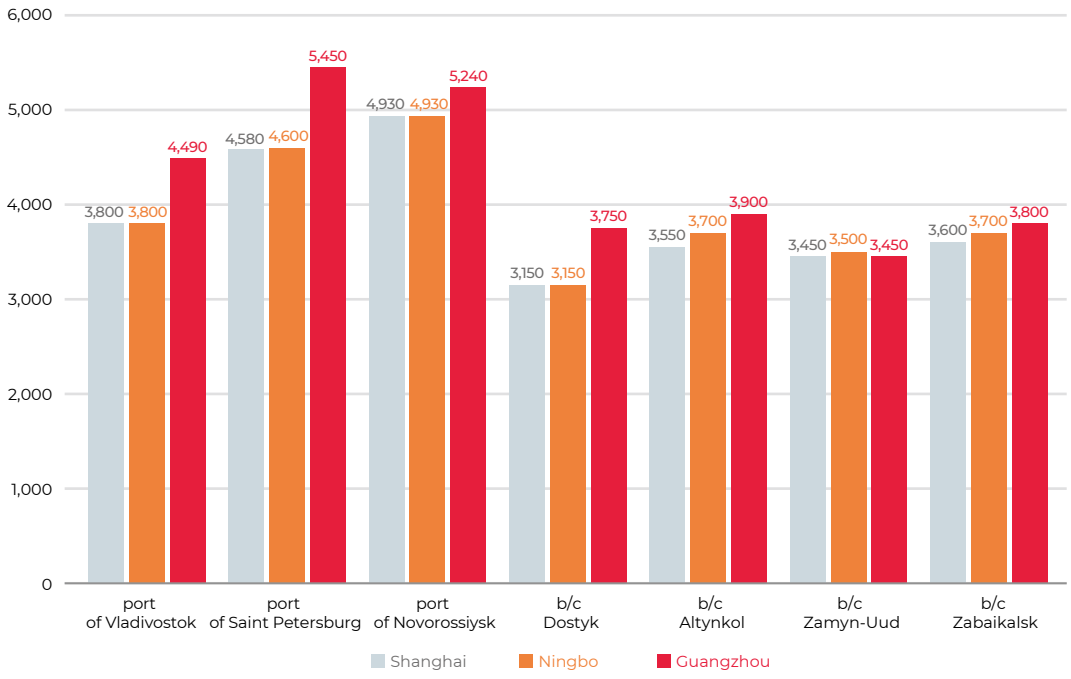
There is also a route via the Black Sea to the port of Novorossiysk, which is used to deliver cargo to southern regions of Russia. Delivery times from China to Novorossiysk are about 30-35 days. According to other operators, cargo from the ports of Ningbo, Shanghai and Rizhao reaches Novorossiysk in 46 days. The Shanghai-Novorossiysk route will cost customers an average of $4,900 per FEU. The advantage of this route is the presence of a convenient cargo port with final unloading in the southern part of the country. As a rule, cargo is then distributed by road or rail. The cost of road transportation to Moscow is $1,650-2,030 per FEU, while the rail route is approximately $1,000 per FEU (current as of early July 2025).

In 2024, the cargo turnover of the seaports of the Azov-Black Sea basin exceeded the indicators of other basins of Russia and amounted to 275.7 million tons (-5.4%). The leading position belongs to the port of Novorossiysk, whose cargo turnover increased by 2.1% and reached 164.8 million tons. Container turnover of the Azov-Black Sea basin, which almost entirely falls on the port of Novorossiysk, at the end of 2024 increased by 6.5% compared to the level of the previous year and amounted to 1.07 million TEUs. The growth was achieved due to an increase in container exports by 13% to 560 thousand TEUs (+64.8 thousand TEUs).

According to the results of April 2025, container turnover of the ports of the Azov-Black Sea basin, particularly the port of Novorossiysk, decreased by 9% compared to the same period of the previous year, amounting to 95.5 thousand TEUs. Export-import transshipment volumes in April 2025 amounted to about 48 thousand TEUs, which is also lower than the average for April 2024, which was about 53 thousand TEUs.

The Northern Sea Route (NSR) is becoming increasingly important in logistics between China and Russia, offering an alternative to traditional routes through the Suez Canal. In 2024, there was a significant increase in cargo transportation along the NSR, especially in the direction of China. Cargo traffic along the NSR amounted to 37.9 million tons, exceeding last year's record result by more than 1.6 million tons. The travel time is from 18 days, and the cost of one trip ranges from $488.9 thousand to $602.1 thousand (for comparison, a trip through the Suez Canal costs from $732.9 thousand). According to ERAI experts, the cost of the Lianyungang-Arkhangelsk route varies from $4,960 to $5,460 per FEU (as of early July 2025). Despite significant successes, the NSR faces a number of limitations: seasonality of navigation (July–October), the need for icebreaker support, and limited infrastructure. Therefore, full-fledged year-round use of the route is currently impossible.

COMPARISON OF THE COST OF MULTIMODAL AND RAIL TRANSPORTATION OF A 40-FOOT CONTAINER (COC) FROM CHINESE PORTS TO MOSCOW, USD



Source: compiled by the authors based on data from Teustat (current as of July 2025)

Road and air freight

Sending road freight from China to Russia is a flexible and efficient way to deliver goods, especially for urgent deliveries and routes where rail or sea logistics are less available.

The main road freight routes pass through various border crossings, including Suifenhe (Pogranichny), Manzhouli (Zabaikalsk), Erlian (Zamyn-Uud), Altynkol (Khorgos), Raohe (Pokrovka), Duning (Poltavka), and Mishan (Turiy Rog). The main border crossing points can be combined into three large groups — through Kazakhstan, Mongolia and the Far East, which coincides with the railway routes. These routes provide for the delivery of goods to various regions of Russia, including Moscow, Yekaterinburg, Novosibirsk and other cities. Delivery times vary depending on the route and can be from 11 to 25 days.

The cost of road freight depends on the route, volume and weight of the cargo. For example, delivery from Beijing to Yekaterinburg can cost from $7,600, from Shanghai to St. Petersburg — from $8,500, and to Moscow — $8,000. The cost for a full truck load (FTL) with a volume of 90 m^3 (awning) or 103 m^3 can start from $7,000. For less than full truck loads (LTL), the cost per Euro pallet can vary from $350 to $450.

In 2024, there was a significant increase in road freight traffic from China to Russia. 589.2 thousand eastbound trucks passed through road border crossings on the border with China and Mongolia, which is 48.8% more than in 2023. Of these, 327.4 thousand trucks entered Russia, which is 38.3% more than in the previous year, whereas 261.8 thousand vehicles left Russia (an increase of 64.4%).

Other border crossings also showed growth. For example, more than 76.4 thousand trucks (+66%) passed through the Pogranichny checkpoint in Primorsky Krai. The Kani-Kurgan checkpoint in Amur Oblast processed over 52.1 thousand vehicles (+30%).

The overall growth in road transport is due to the increase in trade turnover between Russia and China, as well as measures to improve the infrastructure and organization of border crossing points, including the introduction of a 24-hour operating mode and an electronic queue. At the same time, the issue of congestion at ports and railways is acute. Back in July 2024, logisticians noted the problem of a lack of space on ships for sending goods, as a result of which market players resorted to road transport. According to the International Road Transport Union (IRU), in 2024, there was rapid growth in the segment of international road transport under the TIR system in China. The number of registered carriers and vehicles involved in TIR operations has more than quadrupled.

The main advantages of road transport are the flexibility of routes and the possibility of door-to-door delivery, as well as the transportation of various types of cargo. Delivery times are also considered more attractive compared to the sea route. At the same time, the cost of transporting goods is higher, compared to rail and sea transport.

Given the current trends and infrastructure development, road transport from China to Russia is expected to continue to play an important role in logistics between the two countries.

Air transport is traditionally considered the fastest and most expensive, and therefore is less often chosen by shippers as a transport option when alternatives are available. In 2024, air cargo transportation between China and Russia showed steady growth, reflecting the general trends of recovery and expansion of logistics links between the two countries.

In Russia, air cargo turnover increased by 11.4% in 2024, reaching 1.9 billion ton-kilometers. This was made possible by expanding cooperation with countries in the Asia-Pacific region, including China. The key air cargo routes between China and Russia in 2024 were Moscow-Beijing and St. Petersburg-Shanghai. The volume of transportation on the Moscow-Beijing route amounted to about 50 thousand tons (+12%). The St. Petersburg-Shanghai route also showed stable growth, reaching 28 thousand tons (+10%).

Cargo transportation from the largest Chinese industrial centers — Beijing, Guangzhou, Hong Kong, Shanghai, Shenzhen — by direct flights to Moscow is carried out within two days. The tariff varies, depending on the route, from $2.50 to $5.5 per kilogram of cargo. According to other sources, the total door-to-door delivery time, including cargo delivery to the airport, customs clearance and removal from the port of arrival, is realized within seven days at a rate of about $5 per kilogram and a minimum cargo volume of 50 kg.

It is expected that in 2025, the volume of air cargo transportation in Russia will continue to grow, reaching 2 billion ton-kilometers. This is due to the ongoing restoration of international logistics chains and increasing demand for the fast delivery of goods. And by 2027, it is planned to increase freight turnover to 2.7 billion ton-kilometers with a total volume of freight transportation at the level of 0.82 million tons.

Table 2.

COMPARATIVE TABLE OF CHINA-RUSSIA ROUTES BY TYPE OF TRANSPORT

Transport means	Main routes	Delivery times	Cost of shipping (Moscow)
Rairoad	China — Kazakhstan (Dostyk, Altynkol)/ Mongolia (Zamyn-Uud) / Far East / Zabaikalsk — Moscow	15–30 days	~ 3,150–4,000 USD per FEU figures vary depending on the railway corridor
Sea-based (multimodal)	Chinese Ports — Russian Ports — Moscow	35–50 days	via Vladivistok: ~ 3,900 USD per FEU via Saint Petersburg: ~ 4,500–4,700 USD per FEU (door-to-door) via Novorossiysk: ~ 4,900–5,000 USD per FEU
Automobile	China — Kazakhtstan (Altynkol) / Mongolia (Zamyn-Uud) / Far East — Moscow	11–25 days	~ 8,000 USD per FEU (22 tons)
Aircraft	China — Moscow, Saint Petersburg (direct flights)	2–7 days	~ 5 USD/kg, i.e. ~ 5,000 USD per ton or ~ 50,000 USD for 10 tons

Source: compiled by the authors based on open source data

CONCLUSION

Russia has carried out a large-scale reorientation of its foreign economic policy towards the countries of Eurasia. Under the new conditions, China has become a key strategic partner and the main «window» for Russian foreign trade turnover. According to the results of 2024, trade turnover between the countries reached a record $244.6 billion, which is 2.3 times higher than in 2018.

Despite the record levels of trade turnover between Russia and China achieved in 2024, the results of the first quarter of 2025 signal a possible correction. This decline is due to a number of structural factors — from macroeconomic to market conditions. In 2025, the focus will be not so much on the quantitative increase in turnover, but on increasing the sustainability of logistics chains, technological independence and route diversification.

Against the backdrop of trade restrictions, China is the most important supplier of high-tech products and consumer goods to Russia. Given the general saturation of the Russian consumer market with Chinese goods and the focus on import substitution, there will be certain prospects for the supply of capital goods, including machine tools and various components.

Railroad transit through Kazakhstan, Mongolia and the Far East is the most important channel for continental logistics. Transportation schemes involving rail are more profitable than sea-based ones, given the high freight rates on routes from Asian ports and the stable loading of Far Eastern terminals. While road transport offers more flexible delivery and processing times, it is limited in tonnage, and the cost of delivery over long distances is higher. Consequently, large and heavy cargo will continue to gravitate towards rail or sea transport in the absence of serious disruptions that disrupt the rhythm of deliveries.

Thus, trade between Russia and China remains the most important link in trade and economic relations in Northern Eurasia. The expected adjustment of trade is objective and necessary, given the past period of rapid growth. Stabilization and even a possible reduction in Russia's Chinese imports by the end of 2025 will not lead to a change in the long-term trade trends of partners who are striving to maintain the achieved level of interaction.

In terms of modes of transport, the existing structure of Chinese imports to Russia favors the use of railway routes for the delivery of goods. In the absence of serious disruptions, delays, and with the maintenance of a moderate tariff policy, railway routes have a number of competitive advantages over other modes of transport. If the acceleration of freight movement will attract shippers using road transport "on rails" (for example, e-commerce goods), then the price factor will probably be decisive for the transition of shippers using sea transport. Thus, despite the market, the competitiveness of rail transport will be determined primarily by the efficiency of the railway itself, including operators and infrastructure owners.