

Opinion **The FT View**

China is winning the race for the Ice Silk Road

Melting in the Arctic is unleashing a geopolitical tussle over new trade routes

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Chinese researchers working on the Arctic sea ice. Over the past few decades China has become much more focused on both maritime dominance and the High North © Xinhua/Shutterstock

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Last month, global sea temperatures reached a record high for July. This is an ominous sign for climate change, which is contributing to maritime heatwaves across the Atlantic, Pacific and Mediterranean. But, like it or not, it also presents commercial opportunities. As Arctic ice melts, new shipping lanes in the High North have opened. They promise to radically decrease the time and energy it takes to transport commercial goods from the Atlantic to the Pacific. These new commerce pathways will also reshape the geostrategic map.

Under his “Donroe Doctrine”, US President Donald Trump has promised to prioritise security in the areas closest to America — which would include the northern and western hemispheres — and has made threats to take over Greenland. But it is China (with the help of Russian icebreakers) that is making the most of the new opportunities for commerce and transit in the Arctic. This week, a Chinese shipping line launched the first weekly container ship passage through the Arctic. The route, which skirts Russia on a journey between China’s east coast and the UK, has been branded the “Ice Silk Road”.

This points directly to the fact that over the past few decades China has become much more focused on both maritime dominance and the Arctic. Shortly after its entry into the World Trade Organization, China made the maritime and shipping sector a strategic focus, further eroding US strength in the area. China has tripled its production relative to the US over the past two decades, controlling 55 per cent of the shipbuilding industry, versus 5 per cent in 2000. The resulting asymmetry comes with both commercial and military concerns for the US, but also for any country that depends on it for security.

There is now a bipartisan push in the US to pass the Ships Act — which aims to revitalise domestic shipyards and expand the US commercial fleet — though critics say it has been watered down thanks to lobbying by American importers who don’t want to pay higher prices to ship on US vessels. Trump himself has garnered praise for inking a deal to build icebreakers with Finland (even if the strategy itself was pushed by generations of Finnish leaders and developed in large part by the Biden administration).

More icebreakers will be necessary to move through Arctic waters as commerce pathways open — even when there is no visible ice, an icebreaker is often needed to ship safely in the High North as winds and waves can change quickly and trap ships in ice. A few years ago, China declared itself a “near Arctic” nation, with interests in the region, and started working more closely with Russia — which owns dozens of icebreakers — on oil and gas transport to and from the area. Russia has attempted to exert sovereign control over the Northern Sea Route.

Meanwhile, the US, Canada, and various other European and Asian countries are also looking to do more Arctic seabed mapping. They are seeking viable routes over the Arctic and to better understand the landscape of the Northwest Passage, as well as explore minerals — rare earths are plentiful but not yet well tapped — natural gas and new commerce routes in the region.

The frozen north attracted a lot less attention before climate change opened these opportunities. Of course, sending more ships through the region contributes to the breakdown of sea ice. But that also creates a cycle in which the more commerce pathways open, the more countries and companies will look to exploit them. A new race to secure, exploit, and even colonise a melting Arctic is under way. As with so many aspects of today’s geostrategic shifts, China has an early lead.

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