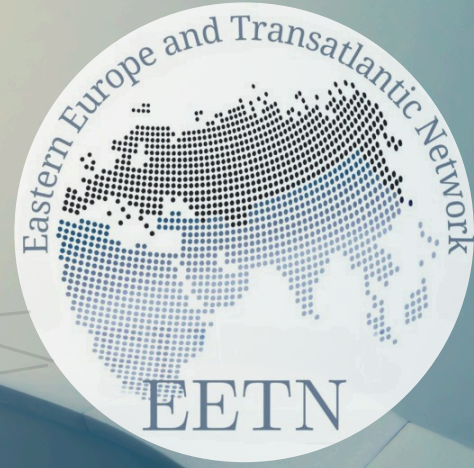


POLICY BRIEF



The Black Sea in 2026: Strategic Manoeuvres and Economic Opportunity

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Key Points

- The Black Sea has emerged as a critical economic and security corridor, regionally and globally
- China, Russia and the EU have developed strategies to increase regional influence
- Who controls the Black Sea is crucial to Ukraine's present and future
- Canada has an important role to play as a NATO ally and supporter of Ukraine

Figure 1. Key strategic nodes in the Black Sea.



Map source: Wikimedia Commons (Black Sea map), annotated by EETN (2026)

https://commons.wikimedia.org/wiki/File:Black_Sea_map.png

Key strategic nodes in the Black Sea.

1. Montreux chokepoint (Türkiye)
2. Odesa, Ukraine (grain exports)
3. Novorossiysk, Russia (exports)
4. Constanța, Romania (EU/NATO hub)
5. Romania/Bulgaria EEZ area (indicative) / shadow fleet activity
6. Batumi/Poti, Georgia (Middle Corridor entry)
7. Ochamchire, Abkhazia/Georgia (proposed base; reported/stalled)

Introduction

The Black Sea has emerged as a critical geopolitical, security and economic space following Russia’s full-scale invasion of Ukraine in 2022. Russia envisions the Black Sea as central to its expansionist strategy in Europe and its influence over the Global South. Türkiye is determined to retain its hold on the Sea as new powers enter, including China and the European Union (EU). The EU’s new [Strategic Approach to the Black Sea Region \(2025\)](#) recognizes the “growing and multi-faceted threats” to member states and partner countries, including, of course, Ukraine.

Black Sea security is becoming increasingly important as global trade routes change. The rapidly growing Trans-Caspian International Transport Route, or “[Middle Corridor](#),” links China, Japan, and South Korea— through Central Asia, the Caspian and Black Seas—to Europe. Both Russia’s and Ukraine’s futures are tied to the Sea. As the war grinds on, naval operations persist with future control unclear.

Eventual postwar reconstruction will further link Ukraine's destiny to the Sea. Canada is currently involved in the [Black Sea Mine Countermeasure Task Force](#) with Romania, Bulgaria and Türkiye.

This policy brief will situate major actors and issues in Black Sea security as threats and opportunities evolve in 2026. Littoral states of Romania, Bulgaria, and Georgia seek security with the assistance of global powers given the high stakes involved in control over the Sea. The European Union and NATO partners, including Canada, must move quickly and carefully to ensure support for allies and develop regional trade.

Russia

Russia has lost about [one-third of its Black Sea fleet](#) as a result of successful Ukrainian military operations since 2022. Its main Black Sea port of Novorossiysk still serves as a vital hub for oil and food exports. [Over 30 percent of Russia's international trade transits through the Black Sea](#). Türkiye does not follow Western sanctions and accepts Russian trade. Russia's shadow fleet sails to the edge of Romanian and Bulgarian [Exclusive Economic Zones](#) and unloads oil and other black-market goods. Russian grain, shipped through the Black Sea, has become critical to Africa, [more than doubling over the last two decades](#). Russia remains challenged to reassert military dominance in the Black Sea, however. Plans for a naval base further from Ukrainian weaponry at Ochamchire, Abkhazia are stalled. [Russia is focusing on the construction of small missile boats, corvettes and frigates](#). Military advances that might bring the Black Sea port of Odesa under threat, or into Russian hands, could offer Russia complete control of the Northern Black Sea.

Türkiye

Türkiye seeks primarily to guard its status as a gatekeeper and dominant actor in the Black Sea. The [Montreux Convention](#) of 1936 allows Türkiye to block Black Sea entry to any military vessels. It has so far prohibited Western, Russian and Ukrainian ships, reflecting its careful balance as a NATO member that has also enjoyed close relations with Russia. Türkiye would [prefer a strong Ukraine](#) to check Russian imperial ambitions. It cooperates with Romania, Bulgaria and Canada in the Mine Countermeasure Mission. The trust level between countries, however, is low, with fears that Türkiye might communicate naval details to Moscow. Türkiye has a capable navy but has relied on the Convention to protect it—and to freeze out competitors. Its “Türkiye first” strategy complicates NATO operations in the Black Sea region.

The European Union

The EU's new Strategic Approach (2025) recognizes critical security and economic issues. Constanta, Romania is the likely host for an envisioned [Black Sea Maritime Security Hub](#). The EU seeks to protect military and civilian infrastructure, including from unmoored Russian and Ukrainian mines. Dual use transport infrastructure would be upgraded to enhance member states' military mobility. Transport infrastructure will also be critical to eventual Ukrainian postwar reconstruction. The EU document also recognizes the [Middle Corridor's growing impact](#), with trade volumes between Eurasia and Europe

doubling along the route, which avoids Russia, since 2022. Bottlenecks and impediments across the sprawling corridor, however, require significant investment—and the document does not discuss financing.

Romania, Bulgaria and Georgia

These littoral states seek to benefit from Middle Corridor trade but face significant security challenges. Russian disinformation is flooding Romania, which advocates to be an EU and NATO terminus for the Black Sea. Its primary goal, [to draw US support, has been complicated by Trump administration policies](#). Romania has cooperated effectively with Canada and the US in the [Mine Countermeasure operation](#) and seeks greater NATO assistance, arguing that further Russian expansionism threatens NATO's southern flank (Moldova and Southeast Europe) as much as its northern one. Romania also seeks economic opportunities through the Middle Corridor, working to involve Japan and South Korea. Bulgaria has taken a [quieter stance to Moscow](#), focusing on economic opportunities. Plans for military modernization [are stalled](#). Georgia, through its ports in Batumi and Poti, is a critical Black Sea transit hub. Port officials note the increase in rare minerals and other goods from Central Asia. China has become Georgia's major infrastructure partner as the government pulls away from a Western orbit. Chinese companies had been contracted to build a new deep-sea port at Anaklia but the project [is suspended](#).

China

China's involvement in Georgia reflects its desire to build the Middle Corridor and Black Sea as part of its Belt and Road initiative (BRI). China is increasingly investing in [digital infrastructure, energy corridors and political alignments](#), aiming at Georgia, Bulgaria and beyond. Its relationships with Türkiye and Azerbaijan have deepened as Russian influence recedes. Russian suspicion towards China's growing Black Sea presence is balanced by it being seen as [less threatening than the West](#). China's move to engage EU states in security partnerships, [notably Hungary](#), offers a blueprint for future engagement with illiberal regimes.

Ukraine's and Canada's Partnership

Ukrainian [drones and unmanned surface vessels](#) have proven extremely effective against Russia's Black Sea fleet. Conflict nonetheless threatens Ukrainian grain exports, [critical to its economic health](#). Canada can play an important role in fortifying the Black Sea, beyond its engagement in the Mine Countermeasure Initiative.

Recommendations for Canada

- Work with NATO and Ukraine on “multi-domain problems;” i.e. to increase military strength in the Black Sea when the entry of warships is blocked by Türkiye's invocation of the Montreux Convention.
- Support Ukraine's grain fleet to ensure continued shipments through the Black Sea.
- Collaborate with Ukraine on drone and USV technology, seeking to apply it to Canada's naval defenses, particularly in the Arctic.

- Leverage presence with Mine Countermeasure Unit to encourage “minilateral” agreements between Bulgaria, Russia and Türkiye.