Overseas Market Analysis Report

Turkmenistan Rubber & Plastics Overseas Market Analysis Report

- Target Country: Turkmenistan
- Main Category: Rubber & Plastics
- Report Date: July 7, 2026

Core Conclusions on Turkmenistan Rubber & Plastics

Turkmenistan's rubber & plastics market features **rising raw material self-sufficiency** alongside **heavy import dependence for finished products**. The Kiyanly polymer plant (PE 381k tons/yr, PP 81k tons/yr) ensures basic raw material supply, but downstream processing capacity for pipes, packaging films, engineering plastics, etc. is insufficient; roughly **over 60% of rubber & plastic products** still rely on imports. As the largest import source, China's rubber & plastic exports to Turkmenistan maintained growth momentum in H1 2026.

- Kiyanly plant PE capacity: **381k tons/yr** , PP capacity: **81k tons/yr**
- Import dependence for rubber & plastic products: ~ **60%–65%**
- China's share of Turkmenistan's rubber & plastics imports: ~ **35%–40%**

Source: ICIS Middle East Petrochemical Report Jun 2026; China Customs Import/Export Statistics May 2026; State Statistics Committee of Turkmenistan Annual Bulletin

Supply-Demand Fundamentals

Turkmenistan's rubber & plastic raw material capacity is gradually ramping up, but domestic consumption growth outpaces the capacity ramp-up, creating a supply-demand gap filled by imports. Estimated domestic consumption of rubber & plastics in 2026 is approximately **420k–480k tons/year**, with construction pipes and agricultural films holding the largest shares.

Indicator	PE	PP	Rubber & Plastic Products
Local Capacity (10k tons/yr)	38.1	8.1+10*	—
Estimated Output (10k tons/yr)	32-35	14-16	8-12
Domestic Consumption (10k tons/yr)	30-33	15-18	25-30
Net Imports (10k tons/yr)	~0	~2-3	15-20

* Including Turkmenbashi Refinery PP capacity ~100k tons/yr

Source: Argus Media Central Asia Petrochemicals Feature May 2026; World Bank Turkmenistan Economic Brief Apr 2026

China Market Overview

In H1 2026, China's rubber & plastics market operated steadily, with PE/PP prices fluctuating narrowly. Domestic capacity is ample, operating rates remain mid-to-high, and exports of rubber & plastic products and raw materials to Central Asia have continued to grow, with active orders along the **Belt and Road** routes.

- LLDPE mainstream price: **7,950–8,850 yuan/ton** ; PP raffia: **7,350–8,100 yuan/ton**
- PE industry operating rate: ~ **82%–86%** , PP operating rate: ~ **78%–83%**

- China's rubber & plastics exports to Central Asia up ~ ↑12%–15% YoY

Source: Longzhong Info Rubber & Plastics Weekly Jul 2026 Wk1; SCI99 PE/PP Monthly Report Jun 2026; China Customs Export Data May 2026

Turkmenistan Market Overview

Local rubber & plastic raw material prices in Turkmenistan are **below international averages** due to government subsidies, but finished product prices are relatively high due to limited processing capacity. Imported products mainly come from China, Turkey, and Iran, with construction and agriculture sectors dominating consumption.

- Local PE ex-works price: ~ $680–$750/ton (FOB Turkmenbashi)
- Imported product CIF premium: ~ 15%–25% (vs. local raw material price)
- Construction pipe consumption share: ~ 38% , agricultural film: ~ 22%

Source: Argus Media FSU/CIS Polymer Markets Jun 2026; Turkmenistan Chamber of Commerce & Industry Sector Brief Mar 2026

Product Breakdown

Turkmenistan's rubber & plastic imports are dominated by **HDPE pipe grade**, **PP injection grade**, and **PVC profiles**, while rubber products mainly consist of tires and seals. The product import structure reflects the country's rigid demand in infrastructure and agriculture.

Product Segment	Main Specs / Use	Import Share (est.)
HDPE Pipe Grade	PE100/PE80 water & drainage pipes	~30%
PP Injection / Fiber Grade	Packaging containers, woven bags	~22%
PVC Profiles / Pipes	Door/window profiles, electrical conduits	~18%
Rubber Tires & Parts	Truck/bus tires, seals	~15%

Source: China Customs HS Code Statistics (Chapters 39–40) May 2026; Turkmenistan Customs Import Commodity Catalog Q1 2026

Core Finished Product Supply & Demand

Polyethylene pipes and polypropylene packaging materials are the rubber & plastic finished products in highest demand in Turkmenistan. Domestic pipe capacity is approximately **60k–80k tons/year**, far below consumption demand (~150k–180k tons/year), resulting in import dependence as high as **55%–60%**.

- PE pipe demand: ~ 150k–180k tons/yr , local output only 60k–80k tons/yr
- PP packaging product imports: ~ 40k–50k tons/yr
- Imported PE pipe CIF price: ~ $1,050–$1,250/ton

Source: Mysteel Rubber & Plastics Downstream Survey Jun 2026; Turkmenistan Construction Industry Association Data Q1 2026

Intermediates & Raw Material Values

Ethylene and propylene are the core intermediates in the rubber & plastics industry chain. Leveraging cheap natural gas resources, Turkmenistan has a **significant advantage** in ethylene production costs, but the downstream derivatives processing chain is still incomplete, and some intermediates still need to be imported from China.

Product	China Ex-works Price	Turkmenistan CIF/Ex-works Price
Ethylene	6,500-7,200 yuan/ton	$380-$450/ton (FOB)
Propylene	6,800-7,500 yuan/ton	$420-$500/ton (FOB)
PE (Film Grade)	8,200-9,000 yuan/ton	$700-$780/ton (Local)

Source: Longzhong Info Olefin Industry Chain Report Jun 2026; Argus Media Central Asia Feedstock Prices May 2026

Trade & Macro Indicators

Turkmenistan's macroeconomy is stable, with GDP growth of about **4.5%–5.5%**. Continued growth in construction and agricultural investment supports rubber & plastics demand. Bilateral trade between China and Turkmenistan remains active, and tariffs on rubber & plastics categories are at relatively low levels.

- Turkmenistan 2026 GDP growth forecast: **5.2%** (World Bank)
- Exchange rate: 1 USD ≈ **3.5 Manat** (official, July 2026)
- Construction sector share of GDP: ~ **12%–14%**
- Rubber & plastic products import tariff: **0%–5%** (MFN rate)

Source: World Bank Global Economic Prospects Jun 2026; IMF Turkmenistan Article IV Consultation Report Mar 2026; China MOFCOM Country Trade Guide

Risks & Opportunity Windows

Geopolitical stability is relatively high, but **logistics cost volatility** and **Manat exchange rate controls** are key risks. Opportunities lie in **localization substitution policies** driving downstream processing investment, and deepening China-Turkmenistan capacity cooperation under the **Belt and Road** framework.

- ⚠ **Risk:** Caspian–Central Asia logistics corridor freight fluctuation up to ±20%
- ⚠ **Risk:** Foreign exchange controls may delay import payment settlement
- Opportunity: Turkmenistan's 2026 new infrastructure plan investment ~$5 billion
- Opportunity: Enhanced policy incentives for China-Turkmenistan rubber & plastics JV projects

Source: EIU Turkmenistan Country Risk Report Q2 2026; Economic & Commercial Office of Chinese Embassy in Turkmenistan Brief Jun 2026

Data Sources Summary

- Longzhong Info — Rubber & Plastics Weekly / Olefin Industry Chain Report Jun–Jul 2026
- Argus Media — Central Asia Petrochemicals Feature / FSU Polymer Markets May–Jun 2026
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