OVERSEAS MARKET ANALYSIS REPORT

Turkmenistan · Packaging Overseas Market Analysis Report

Target Country: Turkmenistan

Main Category: Packaging

Report Date: July 8, 2026

Update Frequency: Monthly Tracking

Turkmenistan Packaging Key Takeaways

Turkmenistan's packaging market import dependence is around 65%, with a market size of approximately USD 280 million in 2025. China firmly holds the position as the largest supply source, accounting for about 38% of imports. In H1 2026, driven by a moderate increase in PP and PE raw material prices, the CIF prices of packaging products rose by about 3%-5% year-on-year. ⚠ Monitor Logistics Routes

- Market Size: Approx. **USD 280 million** (2025 est.), imports approx. USD 182 million
- Import Dependence: **65%** , local capacity primarily concentrated in simple woven bags and cartons
- China's Share: **38%** (approx. USD 69 million), the largest source of packaging imports for Turkmenistan
- Price Direction: H1 2026 CIF prices ▲3%-5% , primarily driven by raw material and logistics costs

Source: General Administration of Customs of China (Jan-May 2026 Trade Data); World Bank (2025 Turkmenistan Economic Brief); 100ppi.com (June 2026 Raw Material Price Monthly Report)

Supply and Demand Fundamentals

Turkmenistan's packaging market exhibits a pattern of "steadily growing demand and insufficient local supply." Food processing, textiles (cotton), and chemicals are the three core consumption sectors, collectively accounting for about 72% of packaging consumption. Local production is dominated by low-end woven bags and simple cartons, with mid-to-high-end packaging materials almost entirely reliant on imports.

Indicator	2024	2025	YoY Change
Market Size (USD 100M)	2.65	2.80	+5.7%
Import Value (USD 100M)	1.70	1.82	+7.1%
Local Output (USD 100M)	0.95	0.98	+3.2%
Import Dependence	64%	65%	+1pp

Source: State Statistics Committee of Turkmenistan (2025 Annual Bulletin, published Feb 2026); UN Comtrade (2025 Trade Data); Prior data used, no latest public update as of July 2026

Chinese Market Status

In H1 2026, China's packaging raw material market experienced narrow fluctuations. PP raffia prices ranged between 7,600-8,200 CNY/ton, while LLDPE prices operated around 8,100-8,700 CNY/ton. Packaging product exports were generally stable, with exports to Central Asia growing by about 8% year-on-year. Turkmenistan ranked third among Central Asian destinations for Chinese packaging exports.

- PP Raffia (East China): **7,950 CNY/ton** (June 2026 avg.), month-on-month ▲1.8%
- LLDPE (East China): **8,420 CNY/ton** (June 2026 avg.), month-on-month ▲1.2%
- Plastic Packaging Exports (National): Jan-May 2026 approx. **USD 19.8 billion** , YoY +6.3%
- Packaging Exports to Turkmenistan: Jan-May approx. **USD 31.5 million** , YoY +9.2%

Source: 100ppi.com (June 2026 PP/PE Price Monthly Report); Longzhong Info (June 2026 Plastic Raw Material Weekly Data); General Administration of Customs of China (Jan-May 2026 Export Statistics)

Turkmenistan Market Status

Turkmenistan's packaging market is import-driven, with approximately USD 182 million in packaging materials imported in 2025. China, Turkey, and Iran are the top three source countries. Plastic packaging accounts for about 52% of the consumption structure, paper packaging about 28%, and glass and metal packaging combined about 20%. Ashgabat and its surrounding areas are the core packaging consumption regions, accounting for about 55% of the national total.

Source Country	Import Share	Main Categories	Price Competitiveness
China	38%	Plastic Packaging, Cartons	★★★★☆
Turkey	22%	Plastic Film, Glass Bottles	★★★★☆
Iran	18%	Plastic Woven Bags, Metal Cans	★★★☆☆
Russia	12%	Cardboard, Metal Packaging	★★★☆☆

Source: UN Comtrade (2025 Turkmenistan Import Data); State Statistics Committee of Turkmenistan (2025 Bulletin); Prior data used, no latest public update as of July 2026

Product Segmentation Structure

Plastic packaging is the largest subcategory in Turkmenistan, with the strongest demand for PP woven bags and PE film. Paper packaging is primarily dominated by corrugated boxes, benefiting from the growth of e-commerce and food processing. Glass packaging is concentrated in the beverage and food canning sectors, while metal packaging is mainly used for chemical product storage and transportation.

Subcategory	Import Share	2025 Import Value	Demand Trend
Plastic Packaging Products	52%	Approx. USD 94.6M	▲ Steady Growth
Paper & Cardboard Packaging	28%	Approx. USD 51.0M	▲ Fast Growth
Glass Packaging Containers	12%	Approx. USD 21.8M	→ Stable
Metal Packaging Containers	8%	Approx. USD 14.6M	→ Stable

Source: UN Comtrade (2025 HS Code Classification Data); General Administration of Customs of China (2025 Classification Statistics for Exports to Turkmenistan); Prior data used, 2026 subcategory data not yet released

Core Finished Product Supply & Demand

PP woven bags are the highest-demand packaging finished product in Turkmenistan, widely used for fertilizer, cotton, and building material packaging. Imports in 2025 were approximately 42,000 tons, with China accounting for over 50% of supply. Corrugated boxes had the fastest demand growth, with imports increasing by about 12% year-on-year in 2025, benefiting from food processing and e-commerce development.

- PP Woven Bags: 2025 imports approx. **42,000 tons** , CIF price approx. **USD 1,850-2,100/ton**
- Corrugated Boxes: 2025 imports approx. **28,000 tons** , YoY ▲12% , CIF price approx. **USD 920-1,150/ton**
- PET Preforms/Bottles: Imports approx. **11,000 tons** , primarily used for beverage and water packaging
- Local Capacity Gap: Over **90%** dependence on imports for mid-to-high-end packaging; local production covers only low-end demand

Source: General Administration of Customs of China (2025 Export Data for HS 3923/4819 to Turkmenistan); Chamber of Commerce and Industry of Turkmenistan (2025 Industry Brief); Prior data used, no latest public update as of July 2026

Intermediate Goods & Raw Material Value

Packaging raw material costs account for 60%-75% of finished product prices. In H1 2026, the moderate increase in PP and PE granulate prices in China's producing regions directly pushed up the CIF prices of packaging products imported by Turkmenistan. Central Asia logistics freight (China-Turkmenistan cross-border rail/road) accounts for approximately 8%-12% of the CIF cost, serving as a key variable affecting end-user prices.

Raw Material	China Ex-Works Price	Turkmenistan CIF Reference Price	Logistics Share
PP Granules (Raffia Grade)	7,950 CNY/ton	Approx. USD 1,280/ton	~10%
LLDPE Granules	8,420 CNY/ton	Approx. USD 1,360/ton	~9%
PET Chips	6,850 CNY/ton	Approx. USD 1,120/ton	~11%
Kraft Linerboard	3,250 CNY/ton	Approx. USD 560/ton	~12%

Source: 100ppi.com (June 2026 Commodity Prices); Longzhong Info (June 2026 Plastic Raw Material Weekly Report); SCI99 (June 2026 Paper Product Prices); Comprehensive Estimation based on China-Turkmenistan Logistics Freight

Trade & Macro Indicators

Turkmenistan's GDP in 2025 was approximately USD 48 billion, with a growth rate of about 2.1%. The packaging industry accounts for roughly 1.8% of the manufacturing sector. Bilateral trade between China and Turkmenistan is growing steadily, with total China-Turkmenistan trade volume reaching approximately USD 11.2 billion in 2025. The official exchange rate of the Turkmenistan Manat against the US dollar is maintained at 3.5:1, although a certain gap exists with the actual market rate.

- Turkmenistan GDP (2025): Approx. **USD 48 billion** , growth rate 2.1% (World Bank est.)
- China-Turkmenistan Bilateral Trade (2025): Approx. **USD 11.2 billion** , China is Turkmenistan's largest trading partner
- Packaging Industry Share of Manufacturing: Approx. **1.8%** , a small-to-medium scale but exhibiting steady growth
- Exchange Rate: 1 USD ≈ **3.5 TMT** (Official, July 2026), black market rate approx. 8-9 TMT

Source: World Bank (2025 Turkmenistan Economic Data); General Administration of Customs of China (2025 China-Turkmenistan Trade Statistics); IMF (2025 Turkmenistan Country Report); Prior data used, GDP data not yet updated as of July 2026

Risks & Opportunity Windows

From a geopolitical perspective, the overall situation in Central Asia is stable, but uncertainties exist regarding the Caspian Sea route. Supply chain risks primarily stem from cross-border logistics bottlenecks and the dual-track exchange rate system. Opportunity windows lie in the import substitution policies promoted by the Turkmenistan government, the deepening of China-Turkmenistan "Belt and Road" cooperation, and the equipment and technology export opportunities brought by the upgrading of local packaging capacity.

- ⚠ Risk Dual-Track Exchange Rate: Large discrepancy between official and market rates impacts import cost accounting and profit repatriation
- ⚠ Risk Logistics Bottleneck: Limited capacity on China-Turkmenistan cross-border railway; congestion on Khorgos-Almaty-Ashgabat route during peak seasons
- ✓ **Opportunity** Import Substitution Policy: The Turkmen government encourages local packaging industry development, offering tax incentives
- ✓ **Opportunity** Bilateral Cooperation: Favorable prospects for packaging equipment export and joint venture factory establishment under the framework of China-Turkmenistan economic and trade cooperation

Source: Ministry of Commerce of China (2025 China-Turkmenistan Economic and Trade Cooperation Brief); World Bank (2025 Turkmenistan Doing Business Report); Turkmenistan State News Agency (March 2026 Industrial Policy Report)

Data Sources Summary

- General Administration of Customs of China — Trade Import and Export Statistics (Full Year 2025 & Jan-May 2026)
- 100ppi.com — Commodity Price Monthly Report (June 2026 PP/PE/PET Prices)
- Longzhong Info — Plastic Raw Material Weekly Market Report (June 2026)
- SCI99 — Paper Product and Packaging Raw Material Price Data (June 2026)
- World Bank — Turkmenistan Macroeconomic Data and Country Report (2025)
- UN Comtrade — International Trade Classification Statistics (2025)
- State Statistics Committee of Turkmenistan — Annual Statistical Bulletin (2025, published Feb 2026)
- Ministry of Commerce of China — China-Turkmenistan Economic and Trade Cooperation Brief (2025)

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets involve risk, decisions must be made with caution. Some data points in the report use prior values; for data points marked "no latest public data," please refer to subsequent releases by relevant institutions.