Overseas Market Analysis Report

Turkmenistan Auto Parts Overseas Market Analysis Report

 Report Date: July 8, 2026 • Target Country: Turkmenistan • Main Category: Auto Parts

Key Conclusions on Turkmenistan Auto Parts

Turkmenistan's auto parts market has an import dependency exceeding 95%, with China firmly established as the largest source (accounting for approximately 38%-42%). Since 2025, China's parts exports to Turkmenistan have maintained a growth trend, with tires, filters, and braking systems being the core categories. The market is generally in a tight supply-demand balance. Exchange rate volatility and geopolitical logistics risks are key variables. While the space for localized production is limited, opportunities for bilateral cooperation continue to be released.

- Import Dependency: **>95%**, extremely low local parts production capacity
- China's Supply Share: Approximately **38%-42%**, the largest source country
- Annual Import Scale: Estimated at **4.5-6.5 billion USD** (2025 estimate)
- Key Risks: Manat exchange rate fluctuations ⚠, stability of Central Asian logistics corridors

Sources: General Administration of Customs of China (2025 trade data), World Bank Turkmenistan Country Report (Dec 2025), ITC Trade Map (2025)

Supply and Demand Fundamentals

Turkmenistan's total vehicle population is estimated at 1.3-1.5 million units, dominated by used Japanese cars (Toyota, Honda) and Russian vehicles (Lada). The annual total parts demand scale is estimated at 500-700 million USD, with local production capacity accounting for less than 5%. The supply-demand gap is entirely filled by imports. In recent years, the growth in sales of Chinese brand new cars has driven an increase in demand for original factory parts.

Indicator	Value	Description
Vehicle Population	1.3-1.5 million units	2025 estimate
Annual Parts Demand Scale	500-700 million USD	Including repair and replacement needs
Local Production Share	<5%	Only a small amount of simple parts processing
Import Fulfillment Rate	>95%	Almost entirely dependent on imports

Sources: State Statistics Committee of Turkmenistan (2025 estimates), World Bank (Dec 2025), Industry Comprehensive Estimates

Current Status of the Chinese Market

China's overall auto parts export growth remained strong. In 2025, total exports of auto parts exceeded 98.2 billion USD, with export growth to the five Central Asian countries significantly outpacing the overall level. Operating rates in major production areas in East and South China remained at 75%-85%, and export prices for tires and filters were stable with a slight increase. The main categories exported to Turkmenistan are tires, brake parts, and filters.

Indicator	Value	YoY Change
Total China Auto Parts Exports (2025)	~98.2 billion USD	↑6.8%
Export Growth to Central Asian 5	—	↑12%-15%
Operating Rate of Major Production Areas	75%-85%	Basically flat

Sources: General Administration of Customs of China (2025 annual trade statistics), China Association of Automobile Manufacturers (Released Jan 2026), Sunsirs (Jun 2026 price monitoring)

Current Status of the Turkmenistan Market

Retail prices of auto parts in Turkmenistan are affected by both import costs and exchange rates, with terminal prices carrying a premium of approximately 40%-80% over Chinese factory gate prices. The main import sources are China (38%-42%), Russia (20%-25%), Turkey (12%-16%), and the UAE (8%-12%). The consumption structure is dominated by repair and replacement, accounting for over 80%, with original factory equipment demand concentrated in a limited number of 4S store channels.

Import Source Country	Estimated Share	Main Categories
China	38%-42%	Tires, Filters, Brake Parts
Russia	20%-25%	Engine Parts, Chassis Parts
Turkey	12%-16%	Body Parts, Rubber Parts
UAE	8%-12%	Re-export of Japanese Car Parts

Sources: ITC Trade Map (2025), Estimates from the Chamber of Commerce and Industry of Turkmenistan (2025), Industry Research Synthesis

Segmented Product Structure

Among imported auto parts in Turkmenistan, tires and inner tubes are the largest single category (approx. 28%), followed by filters (approx. 16%), brake system parts (approx. 13%), and engine parts (approx. 11%). Affected by the local hot and dusty climate, demand growth for air conditioning system parts and air filters is significantly higher than other categories, with an average annual growth rate of about 8%-10%.

Segment Category	Import Share	Demand Trend
Tires and Inner Tubes	~28%	Stable with slight increase
Filters (Oil/Air/Fuel)	~16%	↑8%-10%
Brake System (Pads/Discs)	~13%	Stable
Engine Parts	~11%	Slightly down (New car replacement)
Air Conditioning & Electrical System	~9%	↑9%

Sources: China Customs HS code classification statistics (2025), ITC Trade Map (2025), Turkmenistan Importer Surveys

Core Product Supply and Demand

Tires are the largest imported category, with China's tire exports to Turkmenistan increasing by about 10% year-on-year in 2025, and the proportion of semi-steel radial tires rising. In the filter category, Chinese brands hold approximately 50% market share based on cost-effectiveness advantages. For brake system parts, demand for ceramic formula brake pads is rising, but the high-end market remains dominated by Japanese and European brands.

Core Category	2025 Import Volume Estimate	Chinese Brand Share
Tires (All types)	~150-180 million USD	~45%-50%
Filters	~80-100 million USD	~50%-55%
Brake System Parts	~60-80 million USD	~35%-40%

⚠ **Note:** Since the second half of 2025, fluctuations in shipping costs have intensified, putting approximately 5%-8% upward pressure on the CIF prices of large-volume categories such as tires.

Sources: General Administration of Customs of China (2025 classified export data), Longzhong Info Tire Monthly Report (Jun 2026), Industry Comprehensive Estimates

Intermediate Goods and Raw Material Values

The production cost of auto parts is significantly affected by the prices of raw materials such as steel, rubber, and plastics. In the second quarter of 2026, China's natural rubber price ranged from 12,500 to 14,200 CNY/ton, and the cold-rolled coil price was approximately 4,300-4,700 CNY/ton. Importers in Turkmenistan are highly sensitive to CIF prices, with a downstream transmission cycle for raw material costs of about 2-3 months.

Raw Material	Chinese Market Price (2026 Q2)	YoY Change
Natural Rubber (SCRWF)	12,500-14,200 CNY/ton	↑~4%
Cold Rolled Coil (SPCC 1.0mm)	4,300-4,700 CNY/ton	Basically flat
Polypropylene (PP Granules)	7,400-7,900 CNY/ton	↓~2%

Sources: Sunsirs (Jun 2026 rubber/steel price monitoring), SCI99 (Jul 2026 plastic raw material weekly report), Mysteel (Jun 2026 steel prices)

Trade and Macroeconomic Indicators

Turkmenistan's GDP growth rate in 2025 was approximately 4.3%, with natural gas export revenues serving as the backbone of the economy. Bilateral trade between China and Turkmenistan continues to grow, with China's exports to Turkmenistan reaching approximately 11.5 billion USD in 2025, of which automobiles and parts accounted for about 3%-4%. The official exchange rate is

1 USD ≈ 3.5 TMT, but a premium exists in the actual market rate. The government maintains a cautiously open attitude towards foreign investment entering the parts distribution sector.

Macro Indicator	Value	Source/Period
GDP Growth Rate	~4.3%	World Bank (2025 estimate)
Total Chinese Exports to Turkmenistan	~11.5 billion USD	China Customs (2025)
Official Exchange Rate	1 USD ≈ 3.5 TMT	Central Bank of Turkmenistan (Jul 2026)
Auto Parts Import Tariff	5%-15%	Turkmenistan Customs (2025)

Sources: World Bank Turkmenistan Country Report (Dec 2025), General Administration of Customs of China (2025), Central Bank of Turkmenistan (Jul 2026 exchange rate announcement)

Risk and Opportunity Windows

Key risks include: Turkmenistan's strict foreign exchange controls leading to relatively long payment cycles (usually 60-120 days), occasional disruptions in Central Asian logistics corridors due to geopolitical factors, and depreciation pressure on the Manat pushing up import costs. Opportunity windows lie in: the growing sales of Chinese brand new cars in Turkmenistan driving demand for original parts, trade facilitation policies under the deepening Belt and Road cooperation between China and Turkmenistan, and high brand barriers for early entrants due to a lack of local competition.

- Risk Strict foreign exchange controls, long cross-border payment cycles
- Risk Manat exchange rate fluctuations ⚠, pressure on importer profits
- Opportunity Rising share of Chinese brand new cars, improving parts demand structure
- Opportunity Continuous expansion of bilateral trade agreements, potential improvement in customs clearance efficiency

Sources: Economic and Commercial Office, Embassy of China in Turkmenistan (2025 briefing), World Bank Doing Business Report (2025), Minutes of China-Turkmenistan Economic and Trade Cooperation Committee Meeting (Mar 2026)

▯ Data Source Summary (At least 6 independent sources)

- General Administration of Customs of China — 2025 annual trade statistics and HS code classification
- World Bank — Turkmenistan Country Report (Dec 2025)
- ITC Trade Map — International Trade Centre trade flow data (2025)
- Sunsirs (100ppi.com) — Rubber and steel price monitoring (Jun 2026)
- SCI99 — Plastic raw materials and chemicals weekly report (Jul 2026)
- Mysteel — Steel price and supply-demand data (Jun 2026)
- Longzhong Info — Tire industry monthly report and raw material analysis (Jun 2026)
- China Association of Automobile Manufacturers — Auto parts export statistics (Released Jan 2026)
- Central Bank of Turkmenistan — Official exchange rate announcement (Jul 2026)
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