Turkmenistan Cold Chain Equipment Overseas Market Analysis Report

 Main Category: Cold Chain Equipment

 Target Country: Turkmenistan

 Report Date: July 8, 2026

Key Conclusions: Turkmenistan Cold Chain Equipment

Driven by agricultural export expansion and urban consumption upgrades, Turkmenistan's cold chain equipment market relies heavily on imports, with weak domestic manufacturing capacity. H1 2026 imports rose 15% YoY, with China dominating supply. Forex volatility and logistics bottlenecks are core risks.

H1 2026 Cold Chain Equipment Imports	USD 48M ▲15%
China Market Share	47%
Refrigerated Transport Capacity Gap	~40%
Core Driver	Fruit/Meat Exports

 Source: State Statistics Committee of Turkmenistan, China Customs (Jul 2026)

Supply & Demand Fundamentals

Domestic output is extremely low, with near-total dependence on imports to meet demand. H1 2026 imports accounted for 97.5% of consumption, and local assembly capacity remains limited.

Indicator	2025	H1 2026	YoY
Domestic Production (USD 10K)	220	120	+5%
Imports (USD 10K)	8200	4800	+15%
Consumption (USD 10K)	8400	4900	+12%
Import Dependence	97.4%	97.5%	Flat

 Source: Ministry of Industry and Trade of Turkmenistan, industry estimates (Jul 2026)

China Market Status

China's cold chain equipment exports continue to grow, with exports to Turkmenistan up 18% YoY. Raw material prices are stabilizing; refrigerant R22 price carried forward.

Exports to Turkmenistan (H1 2026)	USD 21.5M ▲18%
Semi-hermetic Compressor Avg Price	CNY 22,000/unit
PU Cold Storage Panel (10cm)	CNY 120/㎡
Refrigerant R22 Market Price	CNY 18,000/ton (carried forward)

□ Source: China Customs, SCI99, Longzhong (Jul 2026)

Turkmenistan Market Status

Local delivery prices carry a 30%-40% premium over China FOB prices due to logistics and tariffs. Consumption is dominated by agricultural product preservation, with fruit exports the largest demand driver.

Source Country	Share	H1 2026 Import Value
China	47%	USD 22.5M
Turkey	22%	USD 10.5M
Russia	18%	USD 8.6M
Others	13%	USD 6.2M

□ Source: Customs Committee of Turkmenistan, Argus Media (Jul 2026)

Product Segment Structure

Cold storage and cold chain transport equipment dominate imports, while refrigeration units and parts maintain steady growth.

Cold Storage Panels & Refrigeration Units	40%
Reefer Trucks/Transport Containers	30%
Commercial Freezers & Parts	20%
Other Refrigeration Equipment	10%

🔲 Source: China Customs HS Code Statistics (Jul 2026)

Core Finished Product Supply & Demand

Demand for prefabricated cold storage (PIR panels) is robust, with annual local demand of about 80,000 m³ vs. local supply of less than 10,000 m³. CIF prices remain high.

Prefab Cold Storage Demand	80,000 m³/year
Local Supply	<10,000 m³/year
Average CIF Price	USD 80-120/㎡
Pre-cooling Facility Gap	Urgent

🔲 Source: Ministry of Agriculture of Turkmenistan, Mysteel (Jul 2026)

Intermediate & Raw Material Values

Key raw material prices are stable, with CIF costs to Turkmenistan significantly affected by freight and exchange rates. The official TMT exchange rate remains stable.

PU White Material (China)	CNY 14,500/ton
Refrigerant R410A (China)	CNY 25,000/ton
Turkmenistan CIF Premium	+35%
USD/TMT Exchange Rate	1 : 3.5 TMT

🔲 Source: 100PPI, Central Bank of Turkmenistan (Jul 2026)

Trade & Macro Indicators

Turkmenistan's macroeconomy maintains growth, with preferential import tariff windows conducive to cold chain equipment trade.

Indicator	Value
GDP Growth Rate	6.2%
Annual Inflation Rate	8.5%
MFN Import Tariff	0-5%
China-Central Asia Trade Facilitation	Ongoing

 Source: World Bank, Asian Development Bank (Jul 2026)

Risk & Opportunity Window

The National Food Safety Plan unlocks cold chain infrastructure dividends, but downward pressure on natural gas prices drives forex reserve volatility — payment risks warrant attention.

Opportunity: National Cold Chain Investment Plan — USD 200M

Risk: Forex Payment Delays — Medium-High

Opportunity: Local Assembly Cooperation — Policy Encouraged

Risk: Caspian Sea Logistics Bottleneck — Capacity Constrained

 Source: S&P Global, Turkmenistan Government Gazette (Jul 2026)

Main Data Sources Summary:

China Customs (2026.07)   State Statistics Committee of Turkmenistan   Longzhong / SCI99

World Bank   Argus Media   100PPI   Central Bank of Turkmenistan   Mysteel

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