Turkmenistan Tire Overseas Market Analysis Report

 Report Updated: July 9, 2026

 Target Country: Turkmenistan Main Category: Tires Data as of: Q4 2025 / June 2026

Turkmenistan Tire Key Takeaways

Turkmenistan's tire market is **almost entirely import-dependent**, with China as the largest supplier. 2025 imports were approximately $120 million. Demand for all-steel truck tires and OTR tires is robust. Manat exchange rate volatility and Central Asian logistics costs are core risks; deepening China-Turkmenistan natural gas cooperation drives infrastructure investment, benefiting tire demand.

 2025 Turkmenistan tire imports: approx. **$118 million** (China Customs estimate)

 China's share of tire exports to Turkmenistan: approx. **55%-62%**

 Q1 2026 China all-steel truck tire average export price: **$118/unit** ↑3.2%

 Risk note: ⚠ Manat depreciation pressure 2025 black-market rate premium was about 18% over official rate

Sources: China General Administration of Customs monthly statistics (2025.12); SunSirs tire price index (2026.6); World Bank Turkmenistan Economic Brief (2025.Q4)

Supply-Demand Fundamentals

Turkmenistan has no large-scale tire manufacturing; supply is fully import-dependent. Demand is dominated by truck tires and OTR tires, benefiting from road infrastructure and natural gas field transport. Apparent consumption in 2025 was approximately 1.8-2.0 million units.

Indicator	2023	2024	2025E
Domestic production (10k units)	0	0	0
Import volume (10k units)	~165	~180	~195
Apparent consumption (10k units)	~165	~180	~195
Main consumption fields	Heavy-duty transport 55%, Engineering & mining 25%, Passenger cars 15%, Others 5%		

Sources: UN Comtrade (updated 2025.10); ITC Trade Map (2025.Q4); State Statistics Committee of Turkmenistan (2025.H1, carried forward)

China Market Status

In H1 2026, China's tire operating rates remained high, with all-steel tire capacity utilization around 72%-75%. Export markets continue to provide strong support, and exports to Central Asia maintain growth. Raw material cost fluctuations affect profit margins.

□ Shandong all-steel tire operating rate (Jun 2026): **74.5%**, MoM +1.2pct

□ Semi-steel tire operating rate (Jun 2026): **78.8%**

□ China tire export volume (Jan-May 2026): approx. **285 million units** ↑5.8% YoY

□ East China natural rubber average price (Jun 2026): **¥13,200/ton**, down 4.5% from start of year

Sources: Longzhong Information (2026.6.28); Zhuochuang Information Tire Weekly (2026.7.3); China General Administration of Customs (2026.5)

Turkmenistan Market Status

Local tire distribution is concentrated in Ashgabat and Turkmenabat. Chinese brands dominate with a price-performance advantage. In 2025, the average unit import price of tires was about $58-65; premium brands (Michelin, Bridgestone) held less than 15% share.

□ Import dependence: **≈100%**

□ Main source countries: China (58%), Russia (16%), Iran (8%), Turkey (7%), Others (11%)

□ Local retail average price (12R22.5 truck tire): approx. **$155-185/unit**

□ Consumption structure: Heavy-duty transport dominates; OTR tire demand from natural gas fields grows significantly

Sources: ITC Trade Map (2025.Q4); Industry Brief by Chamber of Commerce and Industry of Turkmenistan (2025.11); local distributor survey (carried forward)

Product Segment Structure

Turkmenistan's tire imports are centered on all-steel radial truck tires, with rapid growth in OTR and agricultural tires. Passenger car tire imports are relatively stable, dominated by mid-to-low-end products.

Segment	2025 Import Share	Avg. Price ($/unit)	Demand Trend
All-steel radial truck tire	48%	105-140	↑ Steady growth
Bias OTR/Agricultural tire	22%	180-320	↑↑ Rapid growth
Semi-steel passenger car tire	20%	28-45	→ Stable
Motorcycle/Specialty tire	10%	15-60	→ Stable

Sources: China Customs HS code 4011 statistics (2025.12); SunSirs segmented product quotations (2026.6)

Core Finished Product Supply & Demand

> All-steel truck tires represent the largest supply-demand gap category in Turkmenistan, with 2025 imports around 940,000 units. OTR tire demand has surged due to gas field development, leading to tight supply and rising prices.

- All-steel truck tire imports (2025): approx. **940k units**, +8% YoY
- OTR tire imports (2025): approx. **430k units** ↑14% YoY
- China 12R22.5 export FOB price (Jun 2026): **$112-128/unit**
- Local inventory cycle: approx. 45-60 days, ⚠ OTR tire inventory low

Sources: Longzhong Information all-steel tire import/export monthly (2026.6); UN Comtrade (2025.10); local distributor feedback

Intermediate & Raw Material Value

> Price fluctuations of key raw materials—natural rubber, synthetic rubber, and carbon black—directly affect imported tire costs. China's production area prices have a transmission effect on export pricing; Turkmen buyers focus on landed cost.

Raw Material	China Ex-factory Price (Jun 2026)	Turkmenistan CIF Reference
Natural Rubber SCR5	¥13,200/ton	$1,780-1,850/ton
Butadiene Rubber BR9000	¥11,600/ton	$1,520-1,600/ton
Carbon Black N330	¥7,800/ton	$1,050-1,100/ton

Sources: SunSirs rubber index (2026.6.30); Longzhong Information carbon black weekly (2026.7.1); Central Asia logistics cost estimate (industry survey)

Trade & Macro Indicators

> Turkmenistan's 2025 GDP growth rate was around 6.3%, supported by natural gas export revenues. China-Turkmenistan trade continues to grow; tire products benefit from Central Asia Regional Economic Cooperation facilitation, though customs clearance efficiency still has room for improvement.

- GDP growth (2025): **6.3%** (World Bank estimate)
- China-Turkmenistan bilateral trade (2025): approx. **$11.2 billion** ↑9.2%

□ Official exchange rate: 1 USD = **3.50 TMT**; black market approx. 4.12 TMT

□ China's tire export tariff to Turkmenistan: MFN rate approx. 5%-8%

Sources: World Bank (2025.Q4); Ministry of Commerce of China Country Trade Report (2026.1); Central Bank of Turkmenistan (carried forward)

Risks & Opportunity Windows

> Strict foreign exchange controls in Turkmenistan and manat devaluation risk are the biggest concerns for importers. On the opportunity side, expansion of the China-Turkmenistan natural gas cooperation corridor drives OTR tire demand, and a feasibility study for a localized tire assembly project has been initiated.

□ Risk: Difficulty in obtaining foreign exchange; LC approval cycle for importers is long (30-60 days)

□ Risk: Central Asia cross-border logistics affected by geopolitical factors; Caspian Sea freight rates fluctuate sharply

□ Opportunity: Turkmenistan-Afghanistan-Pakistan (TAP) Energy Corridor construction, incremental OTR tire demand approx. 150-200k units/year

□ Opportunity: Under the China-Central Asia Summit cooperation framework, tire trade facilitation measures are expected to advance

Sources: ADB Central Asia Economic Outlook (2026.4); Ministry of Commerce of China (2026.1); Turkmenistan State News Agency (2025.12)

□ Data Source Summary (10 sources in total)

1. General Administration of Customs of China — Monthly import/export statistics (2025.12 / 2026.5)
2. UN Comtrade — International merchandise trade database (updated 2025.10)
3. ITC Trade Map — Trade map (2025.Q4)
4. Longzhong Information — All-steel tire operating rate and import/export monthly report (2026.6)
5. Zhuochuang Information — Tire industry weekly (2026.7.3)
6. SunSirs — Rubber and carbon black price index (2026.6.30)
7. World Bank — Turkmenistan Economic Brief (2025.Q4)
8. Asian Development Bank (ADB) — Central Asia Economic Outlook (2026.4)
9. Ministry of Commerce of China — Country trade report · Turkmenistan (2026.1)
10. Chamber of Commerce and Industry of Turkmenistan — Industry brief (2025.11, carried forward)