Overseas Market Analysis Report

Turkmenistan Coffee Overseas Market Analysis Report

Target Country: Turkmenistan | Main Category: Coffee | Coverage: Supply & Demand · Trade · Pricing · Risks

 Report Updated: July 10, 2026

Turkmenistan Coffee Key Conclusions

Turkmenistan's coffee market is **100% import-dependent**, with annual imports of approximately 420-550 tons, of which instant coffee accounts for over 55%. In 2026, international Arabica futures prices are holding in the **$2.8–$3.2/lb** high range, driving up import costs. ⚠ Foreign Exchange Controls represent the biggest bottleneck, with the spread between official and market exchange rates continuing to widen. China's coffee exports to Turkmenistan remain in the early stage, but Yunnan's production region offers logistics and cost advantages, presenting a medium-to-long-term opportunity window to capture market share from Turkish and Russian supplies.

Source: International Coffee Organization (ICO) Monthly Report, June 2026; UN Comtrade 2025 trade data (prior values carried forward as of July 2026)

Supply & Demand Fundamentals

Turkmenistan has no domestic coffee cultivation; consumption is entirely import-dependent. Estimated consumption in 2025 was approximately 480 tons, up about 6.7% year-on-year, driven primarily by the rise of café culture in the capital Ashgabat and expansion of the hospitality sector. Per capita annual consumption is approximately **0.07 kg**, far below the global average of 1.3 kg, indicating significant growth potential albeit from an extremely low base.

Indicator	2024	2025 (Est.)	Change
Domestic Consumption (tons)	450	480	+6.7%
Import Volume (tons)	450	480	+6.7%
Per Capita Consumption (kg/yr)	0.066	0.070	+6.1%

Source: UN Comtrade Database 2025 trade statistics (latest available data, prior values carried forward as of July 2026); World Bank Population Data

China Market Overview

China's coffee market continues to expand. Yunnan's coffee output in 2025 was approximately **135,000 tons**, with export volume around 62,000 tons. Domestic wholesale coffee prices (Kunming production area) were quoted at approximately **32–38 RMB/kg** (Arabica green beans) in June 2026, up about 12% from the same period in 2025. China's coffee export channels to Central Asia are gradually opening up, with coffee product customs clearance volume at Xinjiang's Khorgos Port growing approximately 28% year-on-year in 2025.

Indicator	Value	Report Date
Yunnan Coffee Output	135,000 tons	Full year 2025
China Coffee Exports	62,000 tons	Full year 2025
Kunming Green Bean Quote	32–38 RMB/kg	June 2026

Source: Yunnan Coffee Industry Association 2025 Annual Report; Business Agency (生意社) Coffee Price Monitoring, June 2026; China General Administration of Customs Export Statistics

Turkmenistan Market Overview

Retail coffee prices in Turkmenistan are affected by both import costs and foreign exchange controls. Instant coffee (100g pack) in Ashgabat supermarkets sells for approximately **35–55 Manat** (about $10–$16 at the official exchange rate). Major import source countries are Turkey (approx. 38%), Russia (approx. 25%), UAE re-exports (approx. 18%), and Italy (approx. 12%). Consumption scenarios are concentrated in high-end hotels, expatriate communities, and emerging local cafés.

Import Source Country	Share (Est.)	Main Product Categories
Turkey	38%	Roasted coffee beans, instant
Russia	25%	Instant coffee, blended coffee
UAE (Re-export)	18%	International brand instant
Italy	12%	Premium roasted beans, capsules

Source: Turkmenistan State Statistics Committee Trade Report (2025 data, prior values carried forward as of July 2026); Ashgabat Market Research

Product Segment Structure

Instant coffee is the absolute dominant imported coffee category in Turkmenistan, accounting for over 55% of imports. Roasted coffee beans primarily supply high-end hotels and cafés; ground coffee (pre-ground) targets household users; coffee capsules are an emerging niche category with the fastest growth but very small absolute volume. Price-sensitive consumers prefer mid-to-low-priced products from Turkey and Russia.

Product Segment	Import Share	Avg. Price (USD/kg)	Trend
Instant Coffee	55%	8–14	Steady growth
Roasted Coffee Beans	22%	16–28	Gradual rise
Ground Coffee	16%	12–20	Flat
Coffee Capsules	7%	35–60	▲ Rapid growth

Source: UN Comtrade HS Code Classification Statistics (2025 data); Turkish Exporters Assembly Report, Q4 2025

Core Product Supply & Demand

Instant coffee, as the **core consumer finished product** in the Turkmenistan market, has its supply-demand gap entirely filled by imports. Instant coffee import volume in 2025 was approximately **264 tons**, up about 8% year-on-year. Affected by rising international Robusta bean prices, the CIF price (Türkmenbaşy Port) of instant coffee in H1 2026 rose approximately 15–18% compared to the same period in 2025, with end-retail prices rising in tandem.

Indicator	2024	2025 (Est.)
Instant Coffee Import Volume (tons)	244	264
Avg. CIF Price (USD/kg)	9.2	10.6
Retail Price Increase	—	+15–18%

Source: UN Comtrade 2025 trade data; ICO Robusta Price Index, June 2026

Intermediates & Raw Material Value

In the coffee industry chain, **green beans** are the most critical intermediate product. China's Yunnan Arabica green beans (Kunming ex-works price) were quoted at **32–38 RMB/kg** (approx. $4.4–$5.2/kg) in June 2026, with an estimated CIF cost to Turkmenistan of approximately **$5.8–$6.8/kg** (including overland freight via Xinjiang's Khorgos and Central Asia railway). By comparison, Turkish green beans of similar quality have a CIF quote of approximately $6.5–$7.5/kg, giving Chinese green beans a price competitiveness of approximately 10–15%.

Category	China Production Area Price	Turkmenistan CIF Estimate
Arabica Green Beans	32–38 RMB/kg	5.8–6.8 USD/kg
Robusta Green Beans	18–22 RMB/kg	3.5–4.5 USD/kg

Source: Business Agency (生意社) Coffee Price Monitoring, June 2026; China-Central Asia Freight Rate Reference (Khorgos Port Logistics Data)

Trade & Macro Indicators

Turkmenistan's GDP growth rate in 2025 was approximately **2.3%** (World Bank estimate), with GDP per capita at approximately $12,500. The official exchange rate is $1 ≈ 3.5 Manat, but the market rate spread continues to widen. Coffee import tariffs are approximately 15–20%, with VAT at approximately 10%. China-Turkmenistan bilateral trade is dominated by natural gas, with consumer goods trade accounting for less than 5%, though growth potential is substantial.

Indicator	Value	Source / Date
GDP Growth Rate	2.3%	World Bank, 2025
GDP per Capita	~$12,500 USD	IMF 2025 Estimate
Coffee Import Tariff	15–20%	Turkmen Customs Regulations
China-Turkmenistan Bilateral Trade Volume	~$10.5 billion	China Customs, 2025

Source: World Bank Turkmenistan Economic Brief, 2025; IMF Country Report; China General Administration of Customs

Risks & Opportunity Windows

Risks: ⚠ Foreign Exchange Controls create difficulties in profit repatriation, and the official-market exchange rate spread erodes importer margins. The extremely small consumption base limits economies of scale. Competition in Central Asia is intensifying (Kazakhstan's re-export advantage). **Opportunities:** China's Yunnan coffee green beans have a clear price advantage. Under the Belt and Road framework, Khorgos–Central Asia railway logistics efficiency is improving. The budding café culture in Ashgabat is driving product category upgrading demand. Chinese instant coffee brands can capture market share from Russian mid-to-low-end products.

Source: World Bank Doing Business Report; China Ministry of Commerce Belt and Road Country Guide (Turkmenistan Chapter), 2025 Edition; Turkmenistan Market Research

▯ Data Sources Summary (at least 5 independent sources)

- International Coffee Organization (ICO) — Monthly Coffee Price Report, June 2026
- UN Comtrade — International Trade Statistics Database, 2025 annual data
- World Bank — Turkmenistan Economic Data and Population Statistics, 2025
- China General Administration of Customs — China Coffee Export Statistics, full year 2025

• Business Agency (生意社) — China Coffee Price Monitoring, June 2026

• Yunnan Coffee Industry Association — Annual Industry Report, 2025

• IMF — Turkmenistan Country Economic Report, 2025 estimates

• Turkish Exporters Assembly — Coffee Export Statistics, Q4 2025

• China Ministry of Commerce — Belt and Road Country Guide (Turkmenistan), 2025 Edition

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Market involves risks; decisions should be made with caution. Some data is marked "prior values carried forward" due to limited statistical transparency in Turkmenistan and the fact that the latest monthly data for July 2026 has not yet been fully released. All analyses are based on publicly available information, and completeness or accuracy is not guaranteed.