Turkmenistan Livestock Products Overseas Market Analysis Report

Target Country: Turkmenistan

Category: Livestock Products

Report Update Date: July 11, 2026

Turkmenistan Livestock Products – Key Conclusions

Turkmenistan's livestock sector is dominated by sheep, with the Karakul (Astrakhan) sheep as its signature breed. Wool and lamb pelt exports hold traditional advantages. In 2025-2026, recovering Central Asian regional demand is driving mutton prices moderately higher, but insufficient domestic deep-processing capacity creates import reliance on Chinese livestock equipment and feed additives, reflecting structural complementarity in China-Turkmenistan livestock trade.

Sheep inventory: approx. **15.5** million head (FAO 2023 data), accounting for about 22% of Central Asia's total sheep population.

China mutton wholesale price: approx. **68.5** CNY/kg in June 2026 (MARA), YoY ▲3.2%.

Key risk: ⚠ Low data transparency Official Turkmenistan livestock data releases are lagging; market assessments require multi-channel cross-verification.

Source: FAO STAT 2024 Annual Report; China MARA Livestock Product Price Weekly Report, June 2026

Supply & Demand Fundamentals

Turkmenistan's livestock output value accounts for approximately 47% of agricultural GDP. Domestic meat self-sufficiency is relatively high, but dairy products and feed face shortfalls. Annual wool production is about 32,000 tonnes, with Karakul wool comprising over 60%, clearly export-oriented.

Indicator	2022	2023	2024(E)
Sheep inventory ('000 head)	15,200	15,500	15,750
Mutton output ('000 t)	138	142	145
Wool output ('000 t)	31	32	32
Livestock imports (USD 100M)	1.8	2.0	2.2

Source: FAO STAT Database, 2025 update; Turkmenistan State Statistics Committee Bulletin 2024

Source: FAO STAT; Turkmenistan State Statistics Committee Annual Bulletin (published December 2024)

China Market Status

China is the world's largest mutton consumer, with apparent mutton consumption of approximately 5.6 million tonnes in 2025. In H1 2026, domestic mutton supply was tight and prices rose moderately, with imported mutton's share climbing to about 8.5%. Wool and leather raw material imports from Central Asia showed a growth trend.

Average mutton wholesale price: 68.5 CNY/kg (June 2026, MARA), MoM ▲1.8%.

Wool imports: China imported approx. 280,000 tonnes of wool in 2025, of which Central Asian imports were approx. 42,000 tonnes, YoY ▲11%.

Feed additive exports: China's feed additive exports to Central Asia reached approx. USD 360 million in 2025, with Turkmenistan as a potential growth market.

Source: China MARA Livestock Product Price Monitoring Weekly (Week 4, June 2026); China General Administration of Customs 2025 Import & Export Annual Report

Turkmenistan Market Status

Domestic livestock product consumption in Turkmenistan is dominated by mutton and dairy products. Per capita mutton consumption is approximately 18 kg/year, among the highest globally. The livestock processing segment is weak, with about 70% of wool exported as raw wool, and deeply processed products reliant on imports. Livestock product imports reached approximately USD 220 million in 2024.

Mutton retail price (Ashgabat): approx. 38-42 manat/kg (equivalent to approx. 78-86 CNY), YoY ▲5% in 2025.

Import dependence: Dairy products ~35%, feed ~40%, primarily sourced from Iran, Russia, and Kazakhstan.

Consumption structure: Mutton 42% | Dairy 28% | Beef 15% | Poultry & products 10% | Others 5%.

Source: ADB Central Asia Economic Outlook, November 2025; Turkmenistan official media "Neutral Turkmenistan" report, October 2025 (some prior values carried forward)

Product Segmentation

Turkmenistan livestock products can be divided into four segments: wool, leather, meat, and dairy. Among these, Karakul lamb pelts (Astrakhan pelts) are a premium specialty product with stable international demand. Ordinary wool and mutton are bulk export categories but with lower added value.

Segment	Annual output / scale	Export share	Price trend
Karakul lamb pelts	~800,000 pelts/yr	75% exported	Stable to slightly up
Ordinary sheep wool	~32,000 t/yr	70% exported	Tracks intl. fluctuations
Mutton (carcass)	~145,000 t/yr	15% exported	▲3-5%

Source: FAO STAT; Turkmenistan Ministry of Agriculture 2024 Annual Report Summary

Source: FAO STAT, 2025 update; Turkmenistan Ministry of Agriculture Annual Brief (December 2024)

Core Finished Product Supply & Demand

Karakul lamb pelts are Turkmenistan's highest-value core livestock finished product, with annual exports of approximately 600,000 pelts, mainly sold to Russia, Turkey, and European markets. International demand for premium lamb pelts recovered in 2025, with unit prices rising about 8% YoY and the supply-demand gap widening modestly.

Karakul lamb pelt exports: approx. 600,000 pelts/yr (2024), ▲6% vs. 2023.

Intl. auction avg. price: approx. USD 28-35/pelt (2025 Helsinki Fur Auction), premium grades reaching USD 45/pelt.

Supply-demand gap: Global annual demand for Karakul lamb pelts is approx. 2 million pelts; Turkmenistan supplies ~30%, with the shortfall met by Uzbekistan and South Africa.

Source: Saga Furs Auction House Report, December 2025; International Fur Trade Federation (IFTF) 2025 Annual Market Review

Intermediate Goods & Raw Material Value

Livestock supply chain intermediates include feed (alfalfa, barley), veterinary medicines, and livestock machinery spare parts. Chinese-sourced feed additives are price-competitive, with Turkmenistan import target prices reflecting a 15-20% premium over China FOB prices, reflecting logistics and channel costs.

Intermediate / Raw material	China ex-factory price	Turkmenistan CIF reference price
Feed-grade lysine	~8,500 CNY/t	~10,200-10,800 CNY/t
Alfalfa hay (imported)	—	~USD 320-380/t (CIF)
Livestock fence wire	~5,200 CNY/t	~6,500-7,000 CNY/t

Source: Sci99 2025 Feed Ingredients Annual Report; China Customs 2025 Export Statistics to Central Asia

Source: Sci99 Feed Ingredient Price Monitoring (June 2026); China General Administration of Customs HS Code Statistics

Trade & Macroeconomic Indicators

Turkmenistan's GDP growth rate in 2025 is estimated at approx. 6.3% (IMF estimate), with livestock representing nearly half of agricultural output. Bilateral China-Turkmenistan trade is dominated by natural gas, with livestock product trade accounting for less than 1%, but livestock-related trade value grew approx. 18% YoY in 2024-2025, indicating considerable growth potential.

Turkmenistan GDP growth: approx. 6.3% (2025 IMF estimate), among the highest in Central Asia.

Bilateral trade total: approx. USD 10.6 billion (2025 China Customs), of which livestock-related ~USD 80 million.

Exchange rate: USD 1 ≈ 3.5 Turkmenistan manat (official, July 2026); parallel market rates carry a premium.

Livestock share of agricultural GDP: approx. 47%, benefiting from government feed subsidies and preferential livestock loans.

Source: IMF World Economic Outlook, April 2026; China General Administration of Customs 2025 Trade Statistics

Risks & Opportunity Windows

Major risks include strict foreign exchange controls in Turkmenistan, opaque official data, and weak logistics infrastructure. Opportunity windows lie in the substantial potential for China-Turkmenistan livestock processing cooperation, the cost-performance advantage of Chinese feed additives and livestock machinery, and tariff benefits from Central Asian regional economic integration.

⚠ Risk FX controls: Turkmenistan enforces strict foreign exchange controls; profit repatriation faces obstacles, which can be mitigated through barter trade or local reinvestment.

⚠ Risk Data opacity: Official statistics are released with delays and shifting methodologies, complicating market assessment; establishing local information channels is recommended.

✦ Opportunity: Chinese livestock processing equipment exports to Turkmenistan enjoy zero tariffs (Central Asia Regional Cooperation framework), with related exports up 22% in 2025.

✦ Opportunity: The Turkmenistan government launched a Livestock Modernization Plan in 2025, offering 5-year tax exemptions on imported breeding stock and feed additives.

Source: ADB CAREC 2030, 2025 edition; China Ministry of Commerce Country Trade Guide 2025 Update

Data Source Summary

1. FAO STAT — Livestock production and trade database, 2025 update

2. China MARA — Livestock product price monitoring weekly, Week 4, June 2026

3. China General Administration of Customs — 2025 Import & Export Trade Statistics Annual Report and HS Code data

4. International Monetary Fund (IMF) — World Economic Outlook, April 2026

5. Asian Development Bank (ADB) — Central Asia Economic Outlook, November 2025; CAREC 2030

6. Sci99 — Feed ingredients and livestock product price monitoring, 2025-2026

7. Saga Furs Auction House — International fur auction report, December 2025

8. Turkmenistan State Statistics Committee — 2024 Annual Bulletin (published December 2024)

9. China Ministry of Commerce — Country Trade Guide (Turkmenistan), 2025 update

10. International Fur Trade Federation (IFTF) — 2025 Global Fur Market Annual Review