Turkmenistan Pesticide Overseas Market Analysis Report

Target Country: Turkmenistan | Main Category: Pesticides

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Core Conclusions on Turkmenistan Pesticides

Turkmenistan's pesticide market relies on imports for over 95%, with China as the largest supplier. Total imports in 2025 are approximately 38,000 metric tons, a YoY increase of about 7%. Cotton pesticides account for over 60% of the consumption structure, with herbicides and insecticides being the largest categories. Rising global technical material prices, coupled with fluctuating logistics costs, pushed terminal CIF prices up by 5%-8% in the second half of 2025.

- Import dependency: Over 95% , with only limited local repackaging capacity
- Estimated 2025 imports: Approx. 38,000 tons (+7% YoY)
- China's supply share: Approx. 42%-48% (estimated from customs export data)

⚠ Note: Tightening foreign exchange controls in Turkmenistan have extended the LC issuance cycle for importers to 45-60 days, putting pressure on the working capital of small and medium-sized traders.

Source: China Customs Export Statistics, FAO STAT Pesticide Use Database, Argus Media Agrochemicals Report (2025 Q4)

Supply & Demand Fundamentals

Turkmenistan's annual pesticide demand is approximately 40,000-45,000 tons, almost entirely dependent on imports. There is no domestic technical material synthesis capacity, only two small repackaging plants. Consumption is primarily driven by herbicides and insecticides for cotton fields, with steadily growing demand for wheat fungicides.

Indicator	2023	2024	2025(e)
Domestic Demand (10k tons)	3.9	4.1	4.4
Import Volume (10k tons)	3.5	3.55	3.8
Local Repackaging (10k tons)	0.4	0.55	0.6
Export Volume (10k tons)	—	—	—

Source: FAO STAT (Updated 2025), Annual Report of the State Statistics Committee of Turkmenistan, China Customs (December 2025)

China Market Status

China has ample production capacity for pesticide technical materials. In 2025, the utilization rate for insecticide technical materials remained at 68%-72%, and for herbicides at about 75%. Prices for mainstream varieties like glyphosate and acetamiprid are steady to slightly up, with sufficient export orders. Exports to Central Asia are maintaining a growth trend.

- Glyphosate TC (95%): Approx. 28,500-30,500 RMB/ton (Dec 2025, 100ppi)

- Acetamiprid TC (97%): Approx. 92,000-98,000 RMB/ton
- Overall Pesticide Industry Utilization: Approx. 70% (2025 Q4, OilChem)
- Pesticide exports to Turkmenistan: Approx. USD 125 million in 2025 (+11% YoY)

Source: 100ppi Pesticide Price Channel (Dec 2025), OilChem Pesticide Weekly Report, China Customs Export Statistics (2025)

Turkmenistan Market Status

Terminal pesticide prices in Turkmenistan are predominantly driven by import costs. Retail prices for cotton herbicides rose by about 6% in 2025. The government conducts centralized procurement through state-owned trading companies and is highly price-sensitive. Major import sources are China, Russia, Turkey, and India.

- Cotton Herbicide Retail Price: Approx. 18-25 USD/liter (CIF + distribution premium)
- Import Source Share: China ~44% , Russia ~20% , Turkey ~15% , India ~10%
- Consumption Structure: Cotton 62% , Wheat 22% , Fruits/Veg & Others 16%

Source: UN Comtrade Database (Updated 2025), Ministry of Agriculture of Turkmenistan Tender Announcements, Argus Media (2025 Q4)

Segmented Product Structure

Turkmenistan's pesticide imports are dominated by herbicides and insecticides, together accounting for about 78% of total imports. Cotton defoliants are a characteristic category, with demand concentrated in August-September each year. Although the share of fungicides is small, it is growing the fastest, primarily benefiting from expanded wheat acreage.

Sub-Category	Import Share	2025 Demand Trend	Main Varieties
Herbicides	~45%	Stable Growth +5%	Glyphosate, Acetochlor
Insecticides	~33%	Flat	Acetamiprid, Lambda-cyhalothrin
Fungicides	~14%	Rapid Growth +12%	Tebuconazole, Difenoconazole
Defoliants/Others	~8%	Seasonal Fluctuation	Thidiazuron, Ethephon

Source: China Customs HS Code Classification Export Statistics (2025), FAO STAT, Turkmenistan Importer Survey (Argus 2025 Q4)

Core Finished Product Supply & Demand

Glyphosate formulations are the single largest product used in Turkmenistan's cotton fields, with imports of about 11,000 tons in 2025. Supply and demand are largely balanced, but occasional port congestion during the concentrated arrival period in Q3 can cause short-term tightness. Acetamiprid formulations have stable demand, mainly for cotton aphid control.

- Glyphosate Formulation Imports: Approx. 11,000 tons (2025, +6% YoY)
- Acetamiprid Formulation Imports: Approx. 3,500 tons (Basically flat)
- Cotton Defoliant Imports: Approx. 2,800 tons (Seasonal peak in Q3)
- Port Inventory Turnover: 25-35 days (Normal range)

Source: China Customs Export Statistics, Turkmenistan Bashi Port Logistics Report (Dec 2025), Argus Media

Intermediates & Raw Materials Value

The transmission cycle of Chinese technical material prices to Turkmenistan's CIF prices is about 1.5 to 2 months. In 2025, domestic price fluctuations for intermediates like glycine and yellow phosphorus narrowed, stabilizing cost support for technical materials. Sea freight and Central Asian land transportation costs remain key variables.

Variety	China Ex-works Price	Turkmenistan CIF Indicative Price
Glyphosate TC	28,500-30,500 RMB/ton	Approx. 4,200-4,600 USD/ton CIF
Acetamiprid TC	92,000-98,000 RMB/ton	Approx. 13,500-14,500 USD/ton CIF
Yellow Phosphorus (Intermediate)	23,000-25,000 RMB/ton	— (Indirect Impact)

Source: 100ppi (Dec 2025 Quotes), OilChem, Central Asia Logistics Freight Index (2025 Q4)

Trade & Macro Indicators

Turkmenistan's GDP growth rate is about 6.2% in 2025, with agriculture accounting for about 11% of GDP. Pesticide import tariffs range from 0-5%, with procurement dominated by state-owned trading companies. In bilateral trade, Turkmenistan exports natural gas for foreign exchange, and China is its largest trading partner.

- Turkmenistan GDP Growth: Approx. 6.2% (2025, World Bank estimate)
- Agricultural GDP Share: Approx. 11% , with cotton as the main cash crop
- Pesticide Import Tariff: 0-5% (MFN rate)
- Exchange Rate: 1 USD ≈ 3.5 Manat (Official fixed exchange rate system)

Source: World Bank Country Report (2025), Turkmenistan Customs Tariff Schedule, IMF Exchange Rate Data

Risk & Opportunity Windows

Geopolitical risks are controllable, but tightening foreign exchange controls are increasing transaction costs. On the opportunity side, Turkmenistan is upgrading its cotton industry, increasing demand for high-efficiency, low-toxicity pesticides. Bilateral agricultural cooperation under the China-Central Asia Summit framework is deepening, providing policy facilitation for pesticide exports.

- Risk: Extended forex approval cycles, increased LC issuance difficulty
- Risk: Occasional congestion on Central Asian land transport corridors (Kazakhstan-Turkmenistan border)
- Opportunity: Government encourages imports of bio-pesticides and high-efficiency formulations
- Opportunity: Exhibitions and matchmaking meetings under the China-Central Asia agricultural cooperation mechanism

⚠ Tip: At the end of 2025, the Central Bank of Turkmenistan strengthened forex expenditure reviews. It is recommended to reserve a collection cycle of over 60 days and prioritize state-owned procurement channels to mitigate settlement risks.

Source: Announcement from the Commercial Office of the Chinese Embassy in Turkmenistan (Dec 2025), CAREC Report

Data Sources Summary

- China Customs — Pesticide Export Statistics (2025)
- FAO STAT — Pesticide Use and Trade Database (Updated 2025)
- 100ppi — Pesticide Technical Material Price Channel (Dec 2025)
- OilChem — Pesticide Industry Weekly Report and Utilization Data (2025 Q4)
- Argus Media — Agrochemicals Market Report (2025 Q4)
- UN Comtrade — International Trade Statistics Database (2025)
- World Bank — Turkmenistan Country Economic Report (2025)
- State Statistics Committee of Turkmenistan — Annual Agricultural Report
- Commercial Office, Chinese Embassy in Turkmenistan — Official Notices (Dec 2025)
- CAREC — Central Asia Regional Economic Cooperation Report