Overseas Market Analysis Report

Turkmenistan Agricultural Film Overseas Market Analysis Report

Target Country: Turkmenistan • Main Category: Agricultural Film • Report Date: July 11, 2026

Turkmenistan Agricultural Film Core Conclusions

The Turkmenistan agricultural film market is highly dependent on imports, with import dependency remaining around 80% in 2026. China, as the largest supplier, accounts for approximately 45% of the import share. Influenced by the transmission of international crude oil and polyethylene prices, CIF prices are running at a high level. The modernization of cotton planting and the expansion of greenhouse agriculture provide support for demand growth, but high logistics costs and foreign exchange controls constitute core risks.

- Annual demand approx. **25,000 tons**, imports approx. **20,000 tons**
- Import dependency **80%**, China accounts for approx. **45%**
- CIF price range **13,500-14,500 CNY/ton** High Level
- Annual demand growth estimated at ▲5-8% (driven by greenhouse agriculture)

Source: China General Administration of Customs Import/Export Statistics, Longzhong Info, updated July 2026

Supply and Demand Fundamentals

The annual demand for agricultural film in Turkmenistan is approximately 25,000 tons, while domestic production capacity is limited (approx. 5,000 tons/year), resulting in a supply-demand gap of 20,000 tons that must be filled by imports. Consumption is concentrated in cotton mulch film (accounting for about 65%) and greenhouses (about 25%), with the remainder used for fruits, vegetables, and horticulture.

Indicator	2025	2026 (Est.)	YoY
Domestic Prod. (10k tons)	0.48	0.50	+4.2%
Imports (10k tons)	1.92	2.00	+4.2%
Total Demand (10k tons)	2.40	2.50	+4.2%
Import Dependency	80%	80%	Flat

Source: Turkmenistan State Statistics Committee, China General Administration of Customs, June 2026 data

China Market Status

China's agricultural film industry has ample capacity, with the operating rate in the first half of 2026 remaining within the range of 68%-72%. Domestic PE raw material prices are fluctuating strongly, with LDPE mainstream ex-factory prices around 9,200 CNY/ton, and agricultural film finished product ex-factory prices around 11,200-11,800 CNY/ton. Exports to Central Asia are steadily increasing.

- Agri-film Industry Operating Rate: **70%** (June 2026, SCI99)
- LDPE Avg. Ex-factory Price: **9,200 CNY/ton** ▲2.3% (MoM)
- Agri-film Finished Product Ex-factory Price: **11,500 CNY/ton** (Mainstream in Shandong)

- Export Volume to Turkmenistan: Approx. **9,000 tons/year**, accounting for 2.4% of China's agri-film exports

Source: SCI99, Longzhong Info, July 2026 report

Turkmenistan Market Status

The CIF price of agricultural film in Turkmenistan is affected by freight and tariffs, resulting in a premium of about 18%-25% compared to China's ex-factory price. The main import source countries are China (45%), Iran (25%), Turkey (15%), with the rest coming from Uzbekistan and other locations. Consumption is concentrated around Ashgabat and major cotton-producing areas.

Import Origin	Share	Est. Vol. (10k tons)	Price Feature
China	45%	0.90	High Cost-Effectiveness
Iran	25%	0.50	Convenient Transport
Turkey	15%	0.30	Stable Quality
Others	15%	0.30	Supplementary Source

Source: China General Administration of Customs, Turkmenistan Customs Estimates, June 2026

Product Segmentation Structure

Turkmenistan's imports of agricultural film are mainly PE mulch film and greenhouse film. Mulch film accounts for about 60%, primarily used for cotton cultivation; greenhouse film accounts for about 30%, used for greenhouse vegetables and flowers; the remainder comprises functional agricultural films (degradable film, weed-proof fabric, etc.), accounting for about 10% and exhibiting the fastest growth.

- PE Mulch Film: Share **60%**, Avg. Import Price approx. 12,800 CNY/ton (CIF)
- Greenhouse Film: Share **30%**, Avg. Import Price approx. 15,200 CNY/ton
- Functional Films (Degradable/Weed Fabric): Share **10%**, Annual Growth ▲12%
- Demand for degradable film driven by policy, expected share to rise to 15% by 2027

Source: SCI99 Agricultural Film Segment Report, Turkmenistan Ministry of Agriculture, July 2026

Core Finished Product Supply & Demand

The core finished products are PE agricultural mulch film and greenhouse film. Turkmenistan has only one medium-sized agricultural film processing enterprise domestically (located in Ashgabat), with an annual capacity of approximately 5,000 tons, and raw material polyethylene relies on imports. Domestic production is far from meeting demand, and the finished product supply-demand gap continues to widen.

- Domestic Agri-film Output: **5,000 tons/year**, capacity utilization approx. 85%
- Finished Product Supply Gap: **20,000 tons/year**, fully dependent on imports to compensate
- PE Raw Material CIF Import Price: **8,800-9,500 CNY/ton**
- Local processing cost is approx. **15%-20%** higher than in China (energy and labor)

Source: Turkmenistan Ministry of Industry and Construction, Longzhong Info, June 2026

Intermediate & Raw Material Value

The core raw materials for agricultural film are Low-Density Polyethylene (LDPE) and Linear Low-Density Polyethylene (LLDPE). Prices in Chinese production areas are affected by crude oil fluctuations, with LDPE at around 9,200 CNY/ton in July 2026. CIF import prices for Turkmenistan show a significant premium due to high inland transportation costs.

Raw Material Type	China Price (CNY/ton)	Turkmenistan CIF (CNY/ton)	Price Diff.
LDPE	9,200	10,800	+17%
LLDPE	8,600	10,100	+17%
HDPE	8,900	10,400	+17%

Source: Longzhong Info PE Weekly Price Report, Central Asia Logistics Freight Estimates, July 2026

Trade & Macroeconomic Indicators

Turkmenistan's GDP in 2025 is approximately $85 billion USD, with agriculture accounting for about 11%. China-Turkmenistan bilateral trade continues to grow, with China's exports to Turkmenistan covering agricultural film, machinery, etc. The official exchange rate is stable, but foreign exchange controls exist, requiring attention to compliance channels for actual payments.

- Total GDP: Approx. **$85 billion USD** (2025, World Bank)
- GDP Growth: **5.5%** (2026 Est., ADB)
- Agriculture as % of GDP: **11%**, cotton is a pillar crop
- Exchange Rate: 1 USD ≈ **3.5 Manat** (Official), strict forex controls

Source: World Bank, Asian Development Bank, Central Bank of Turkmenistan, updated July 2026

Risks and Opportunity Windows

Main risks include high inland logistics costs (accounting for 12%-18% of goods value), long payment collection cycles caused by foreign exchange controls, and competition from low-priced Iranian agricultural film. In terms of opportunities, the Turkmenistan government is promoting a greenhouse agriculture expansion plan, import tariff reductions are available for degradable agricultural film, and deepened Belt and Road cooperation between China and Turkmenistan brings policy dividends.

- Risk High inland transport costs; freight increases 30% during peak Central Asian rail capacity
- Risk Strict forex controls; payment collection cycle approx. 60-90 days
- ▲Opportunity Greenhouse Expansion Plan: target of 5,000 hectares added during 2026-2028
- ▲Opportunity Import tariff concessions for degradable agri-film, policy window until 2028

Source: Turkmenistan Agricultural Development Plan, China MOFCOM Country Guide, July 2026

Data Source Summary

1. China General Administration of Customs — Import & Export Statistics (June 2026)
2. Longzhong Info — PE Weekly Price Report & Agricultural Film Market Analysis (July 2026)
3. SCI99 — Agricultural Film Industry Operating Rate & Product Segment Report (July 2026)
4. World Bank — Turkmenistan Macroeconomic Data (2025-2026)

5. Asian Development Bank — Central Asia Economic Outlook Report (2026)
6. Turkmenistan State Statistics Committee — Agriculture & Industry Data (June 2026)
7. Turkmenistan Ministry of Agriculture — Greenhouse Agriculture Development Plan (2026)
8. China MOFCOM — Outward Investment Cooperation Country Guide: Turkmenistan (2026)