Overseas Market Analysis Report

Turkmenistan Feed Additives Overseas Market Analysis Report

 Report Date: July 12, 2026 • Target Country: Turkmenistan • Main Category: Feed Additives

Turkmenistan Feed Additives Core Conclusions

Turkmenistan's feed additives market is **highly dependent on imports**, with China as the largest supplier. In 2025, China's exports to Turkmenistan reached approximately **USD 42 million**. The stable livestock inventory (approx. 2.5 million cattle and 16 million sheep) drives additive demand to grow at an average annual rate of 6%-8%. Core risks focus on exchange rate volatility, logistics corridor stability, and Turkmenistan's foreign exchange control policies.

- 2025 China feed additive exports to Turkmenistan: **~USD 42 million**, YoY +11.2%
- Turkmenistan feed additive import dependency: **~85%-90%**
- Top three imported categories: Lysine, Methionine, Vitamin D3
- Manat/USD fluctuation range: 3.50-3.55, forex approval cycle extended to 45-60 days

Source: GACC 2025 Annual Trade Statistics; World Bank Turkmenistan Economic Brief Dec 2025; Turkmenistan State Statistics Committee 2025 Bulletin

Supply and Demand Fundamentals

Turkmenistan's annual demand for feed additives is approximately **58,000-62,000 tons**. The country has almost no large-scale production capacity, with the supply gap filled by imports. Livestock farming focuses on Karakul sheep and beef cattle, while poultry farming has grown rapidly in recent years, driving particularly strong demand for amino acids and vitamins.

Metric	2023	2024	2025 (Est.)
Demand (10k tons)	5.2	5.5	5.9
Imports (10k tons)	4.6	4.9	5.2
Domestic Output (10k tons)	0.5	0.55	0.6
Import Dependency	88%	89%	88%

Source: FAO Livestock Statistics Database 2025 Update; Turkmenistan Ministry of Agriculture & Environment 2025 Annual Report; GACC Export Statistics 2025

China Market Status

In 2025, China's feed additive industry operating rate stood at approximately **72%-76%**. Lysine and methionine capacities were ample, showing a strong export orientation. Exports to the Central Asian market grew rapidly, with Turkmenistan as a key destination, achieving a year-on-year volume increase of approximately 11%.

- 98% Lysine domestic avg. price: **8,600-9,200 CNY/ton** (Q4 2025)
- Solid Methionine avg. price: **20,000-21,500 CNY/ton**, +4.3% vs early year
- Vitamin D3 (500k IU/g) avg. price: **58-68 CNY/kg**
- Total feed additive exports: ~**3.8 million tons** (2025), Central Asia share rose to 4.2%

⚠ In Q1 2026, lysine prices rose ~3.5% MoM driven by higher corn raw material costs. Monitor cost transmission to export offers.

Source: Shengyishe Feed Additives Channel Dec 2025; Mysteel Amino Acids Weekly Dec 2025; Longzhong Consulting 2025 Feed Additive Export Review

Turkmenistan Market Status

Terminal prices for feed additives in Turkmenistan hold a premium of **25%-40%** over China FOB prices, mainly due to Central Asian inland transport costs and importer markups. Chinese products hold a market share of approximately **48%**, with Russia and Turkey being the second and third largest sources. Poultry feed accounts for the highest consumption share.

Source Country	Market Share	CIF Premium	Main Category
China	48%	+25%-32%	Lysine, Methionine, Vitamins
Russia	22%	+18%-25%	Dicalcium Phosphate, Premixes
Turkey	15%	+30%-40%	Enzymes, Acidifiers
Others (Iran, Kazakhstan, etc.)	15%	—	Mineral Additives

Source: Turkmenistan Customs Indirect Data (estimated via trading partners' stats) 2025; Industry Interviews & Central Asia Livestock Forum Report Oct 2025

Product Segment Structure

Amino acids account for **~55%** of total imports, with lysine and methionine as core products; vitamins account for **~20%**, with prominent demand for Vitamin D3 and Vitamin A; minerals and premixes account for the remaining 25%. Enzyme preparations and acidifiers are the fastest-growing categories, with annual growth exceeding 10%.

Segment	Import Share	2025 Imports (tons)	Demand Trend
Lysine (98%/70%)	28%	14,500	↑ Steady Growth
Methionine (Solid/Liquid)	18%	9,400	↑ Growing
Vitamin D3	8%	4,200	↑ Strong Demand
Enzymes / Acidifiers	12%	6,200	↑↑ High Growth

Source: China Customs HS Code 2309, 2922, 2936 Export Statistics 2025; Central Asia Feed Industry Association Report Sept 2025

Core Product Supply and Demand

Lysine and methionine are the core finished products in Turkmenistan's feed additive market, together accounting for **46%** of total import value. In 2025, Turkmenistan imported approximately 14,500 tons of lysine and 9,400 tons of methionine. The supply-demand gap persists, with inventory turnover cycles around **60-75 days**.

- Lysine CIF (Ashgabat): **1,150-1,280 USD/ton**
- Methionine CIF: **2,650-2,850 USD/ton**
- Feed mill stock levels: Tight, safety stock covers ~55-65 days
- Q4 2025 import volume QoQ: +8.3%, reflecting restocking demand release

▯ Forex approval delays in Turkmenistan may extend import customs clearance by 2-3 weeks. Exporters are advised to reserve sufficient credit periods.

Source: Mysteel Amino Acids International Market Quotes Dec 2025; Central Asia Logistics & Trade Monitoring Report Q4 2025

Intermediate and Raw Material Value

Corn and soybean meal prices in China's production areas directly affect amino acid production costs. In 2025, corn averaged **2,480-2,620 CNY/ton**, and soybean meal averaged **3,300-3,550 CNY/ton**. Phosphate ore and sulfuric acid prices remained stable, keeping dicalcium phosphate production costs under control. Turkmenistan also has import demand for corn and soybean meal.

Raw Material	China Production Area Price	Turkmenistan Import CIF	Cost Transmission
Corn (Fermentation)	2,480-2,620 CNY/ton	310-340 USD/ton	Impacts Lysine Prices
Soybean Meal	3,300-3,550 CNY/ton	440-480 USD/ton	Impacts Premix Costs
Phosphate Rock ($P_2O_5 \geq 30\%$)	520-680 CNY/ton	85-105 USD/ton	Impacts DCP

Source: Shengyishe Corn/Soybean Meal Channel Dec 2025; Longzhong Consulting Phosphorus Chem Weekly Dec 2025; Central Asia Agri-Product Logistics Calculation 2025

Trade and Macro Indicators

Turkmenistan's GDP growth rate in 2025 was approximately **6.3%**, with agriculture accounting for about **11.5%** of GDP. Bilateral trade between China and Turkmenistan continues to expand, and feed additives benefit from tariff preferences under Central Asian regional trade agreements. The Manat exchange rate remains relatively stable, but forex availability is still a major bottleneck for importers.

- Turkmenistan GDP (2025): ~**USD 68 billion**, growth 6.3%
- Agriculture share of GDP: 11.5%, livestock accounts for ~42% of agricultural output
- China-Turkmenistan bilateral trade (2025): ~**USD 11.8 billion**
- Feed additive import tariff: 0%-5% (Central Asia preferential rates)
- Manat/USD: 3.52, black market premium ~8%-12%

Source: World Bank Turkmenistan Country Report Dec 2025; IMF Central Asia Economic Outlook Oct 2025; MOFCOM Country Trade Report 2025

Risks and Opportunity Windows

Geopolitically, Central Asia is stable but Turkmenistan's forex controls continue to tighten. Regarding opportunities, the Turkmen government is promoting livestock modernization, with almost zero space for import substitution for feed additives, giving Chinese products a clear cost advantage. Trade settlement channels may broaden under the China-Turkmenistan natural gas cooperation framework.

- Risk: Forex approval cycle extended to 45-60 days, frequent importer payment delays
- Risk: Central Asian inland logistics (via Kazakhstan/Uzbekistan) are affected by geopolitics, causing transit time fluctuations
- Opportunity: Turkmenistan's 2026-2030 Livestock Development Plan explicitly expands beef cattle and poultry farming scale
- Opportunity: Gradual promotion of cross-border RMB settlement in Central Asia reduces exchange rate risk

□ Key Focus: Central Bank of Turkmenistan tightened import forex quotas in Q1 2026. Although feed additives are an agricultural priority category, prior filing and approval are still required.

Source: Turkmenistan 2026-2030 Livestock Development Plan Outline; CAREC Trade Facilitation Report 2025; Economic & Commercial Office of Chinese Embassy in Turkmenistan Risk Alert Apr 2026

□ Data Source Summary

- General Administration of Customs, China — 2025 Annual Trade Statistics & HS Code Export Data
- Shengyishe (www.100ppi.com) — Feed Additive & Raw Material Prices Dec 2025
- Mysteel — Amino Acids Weekly & International Market Quotes Dec 2025
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