▯ Target Country: Turkmenistan ▯ Main Category: Seed

Turkmenistan Seed Overseas Market Analysis Report

Report Update Date: July 12, 2026

Turkmenistan Seed Core Conclusions

Turkmenistan's seed market demand is approximately 260,000-280,000 tons annually, with an overall import dependence of about 30%. Cotton and wheat seeds are the two core categories, accounting for over 75% of the market combined. Vegetable seed import dependence is as high as 75%, providing structural opportunities for Chinese seed exports. In 2026, agricultural modernization policies will continue to drive demand for high-quality seeds.

Total Annual Seed Demand: Approx. 260,000-280,000 tons (2025 est.)

Overall Import Dependence: Approx. 28%-32%

Vegetable Seed Import Dependence: Up to 75%, the largest import gap category

China's Seed Export Growth to Turkmenistan: ▲ YoY Growth approx. 12%-15% (2025)

⚠ Key Risks: Strict foreign exchange controls in Turkmenistan lead to extended payment cycles; persistent drought conditions threaten the stability of agricultural production.

Source: FAO Database (2025 Annual Report), State Statistics Committee of Turkmenistan, Industry Estimates | Report Date: Dec 2025 / Updated Jun 2026

Supply & Demand Fundamentals

Turkmenistan's seed market generally exhibits self-sufficiency in staple grain seeds, partial import dependence for cash crop seeds, and heavy reliance on imports for high-value vegetable seeds. In 2025, local seed production was approximately 180,000-200,000 tons, with imports of 70,000-90,000 tons, filling the supply-demand gap.

Indicator	2024	2025	2026 Forecast
Local Seed Production (10k tons)	18.5	19.2	19.8
Seed Imports (10k tons)	7.8	8.3	8.6
Total Seed Demand (10k tons)	26.3	27.5	28.4
Import Dependence (%)	29.7%	30.2%	30.3%

Source: FAO Database, Ministry of Agriculture of Turkmenistan Reports, International Seed Federation (ISF) | Report Date: Dec 2025; 2026 data are industry forecasts

China Market Status

China's total seed exports reached approximately USD 4.2 billion in 2025, with significant growth in exports to Central Asia. Cotton and vegetable seeds are advantageous categories for Chinese exports to Turkmenistan, capturing market share steadily through cost-effectiveness and adaptability advantages. Domestic seed production capacity is abundant, and export willingness is increasing.

China's Total Seed Exports: Approx. USD 4.2 billion (2025, Customs Data)

Seed Exports to Turkmenistan: Approx. USD 28-32 million (2025 est.)

Main Export Categories: Cotton seeds, vegetable seeds (tomato, pepper, cucumber)

Domestic Cotton Seed Ex-factory Price: Approx. 8-12 CNY/kg (2026 Q2, Xinjiang)

Seed Production Capacity Utilization: Approx. 78%-82% (Industry est., 2025)

Source: General Administration of Customs of China (2025 Export Statistics), Longzhong Info, China Seed Association | Report Date: Jan-Jun 2026

Turkmenistan Market Status

Turkmenistan's seed market is dominated by state-owned enterprises, requiring government tenders for imported seeds. In 2025-2026, the market shows two trends: rising demand for high-quality hybrid seeds, and gradual improvement in local production capacity though gaps remain. Regarding pricing, CIF prices for imported seeds carry a 30%-80% premium over local seeds.

Seed Category	Import Dependence	Main Source Countries	Reference CIF Price
Cotton Seed	Approx. 35%	Turkey, China	2.5-3.5 USD/kg
Wheat Seed	Approx. 25%	Russia, Kazakhstan	0.55-0.85 USD/kg
Vegetable Seed	Approx. 75%	Turkey, China, Netherlands	5-45 USD/kg

Source: State Statistics Committee of Turkmenistan, International Trade Centre (ITC), Industry Estimates | Latest public data up to Q4 2025

Product Segmentation

Seed categories can be divided into four segments: cotton seeds hold the largest share (approx. 38%), followed by wheat seeds (approx. 35%). Vegetable seeds, though only about 8% of the market, have the highest value, while corn and other seeds account for approx. 19%. Within the vegetable seed segment, tomatoes, peppers, and cucumbers make up over 60% of import volume.

Sub-category	Annual Demand (10k tons)	Market Share	Import Share	Demand Trend
Cotton Seed	Approx. 10.4	38%	35%	▲ Steady Rise
Wheat Seed	Approx. 9.6	35%	25%	→ Stable
Vegetable Seed	Approx. 0.22	8%	75%	▲ Rapid Growth
Corn & Others	Approx. 5.1	19%	30%	▲ Moderate Growth

Source: FAO Database, Ministry of Agriculture of Turkmenistan, International Seed Federation (ISF) | Report Date: Dec 2025

Core End-Product S&D

Seeds serve as agricultural inputs, with core linked end-products being cotton and wheat. In 2025, Turkmenistan's seed cotton output was approx. 1.05 million tons, and wheat output was approx. 3.2 million tons. Cotton exports generate about USD 800 million to 1 billion in foreign exchange, serving as a core driver for seed demand. High-quality cotton seeds can boost yields by 15%-20%, providing significant economic benefits.

Seed Cotton Output: Approx. 1.05 million tons (2025), yield approx. 2.1 tons/ha

Wheat Output: Approx. 3.2 million tons (2025), basically meeting domestic grain demand

Cotton Export Value: Approx. USD 0.8-1.0 billion, accounting for about 12% of total export revenue

Yield Improvement Potential: High-quality seeds can increase cotton yield by ▲ 15%-20%

Source: State Statistics Committee of Turkmenistan, World Bank, FAO | Report Date: Dec 2025; 2026 data retains previous value

Intermediates & Raw Materials Value

Intermediates for seed production include breeding parent materials, seed treatment agents (seed coatings, fungicides), and complementary fertilizers. China holds a significant price advantage in seed coatings and fertilizers, with exports of seed treatment chemicals to Turkmenistan growing by approx. 18% in 2025. Regarding cost transmission, raw material price hikes impact terminal seed prices with a lag of about 3-6 months.

Intermediate/Raw Material	China Origin Price	Turkmenistan CIF Reference Price	Price Trend
Seed Coating (Suspension Type)	28,000-45,000 CNY/ton	Approx. 5-7 USD/kg	▲ Slight Rise
DAP (Base Fertilizer)	3,500-4,200 CNY/ton	Approx. 580-650 USD/ton	→ Stable
Breeding Parent Seeds	Negotiated pricing	30%-60% premium	▲ Demand Rising

Source: Longzhong Info (Fertilizer Prices, Jun 2026), Sunsirs (Pesticide Prices), Industry Estimates | Report Date: Jun-Jul 2026

Trade & Macro Indicators

Turkmenistan's GDP growth rate was approx. 5.8% in 2025, with agriculture accounting for approx. 13% of GDP. China-Turkmenistan bilateral trade volume was approx. USD 11 billion, primarily driven by energy, though agricultural trade is growing rapidly. Turkmenistan is promoting foreign investment cooperation in agriculture. Seed import tariffs are relatively low (0%-5%), but non-tariff barriers (inspection/quarantine, tendering processes) warrant attention.

GDP Growth Rate: Approx. 5.8% (2025, Official Data from Turkmenistan)

Agriculture Share of GDP: Approx. 13% (World Bank est.)

China-Turkmenistan Bilateral Trade Volume: Approx. USD 11 billion (2025, China Customs)

Official Exchange Rate: Approx. 1 USD ≈ 3.5 TMT, premium exists in the actual market rate

Seed Import Tariffs: 0%-5% (Preferential Rate), VAT approx. 15%

Source: World Bank, General Administration of Customs of China, Central Bank of Turkmenistan, Asian Development Bank | Report Date: Dec 2025-Jun 2026

Risks & Opportunity Windows

Major risks include payment delays due to foreign exchange controls, persistent threats from drought to agriculture, and insufficient policy transparency. Opportunity windows lie in the seed upgrading demands driven by Turkmenistan's agricultural modernization strategy, deepening China-Turkmenistan 'Belt and Road' agricultural cooperation, and import substitution space for vegetable seeds and high-quality cotton seeds.

Geopolitical Risk: Central Asia is generally stable, but market access is restricted under Turkmenistan's neutrality policy

⚠ Foreign Exchange Risk: Turkmenistan's strict foreign exchange controls may cause payment delays of 3-6 months. It is recommended to transact using advance payments or letters of credit.

Opportunity Window: The Agricultural Modernization Plan (2025-2030) drives seed import demand ▲ growing at an average annual rate of 8%-10%

Bilateral Cooperation: Under the framework of the China-Turkmenistan Agricultural Technical Cooperation Agreement, seed exports can enjoy priority review channels

Source: Asian Development Bank Country Reports, Ministry of Commerce of China, Ministry of Foreign Affairs of Turkmenistan | Report Date: 2025-Jun 2026

Data Source Summary

- Food and Agriculture Organization of the United Nations (FAO) Statistical Database — 2025 Annual Report
- State Statistics Committee of Turkmenistan — 2025 Agricultural Statistical Bulletin
- General Administration of Customs of China — 2025 Seed Export Statistics and 2026 H1 Data
- World Bank — Turkmenistan Country Economic Report (Dec 2025)
- International Seed Federation (ISF) — Global Seed Trade Report (2025 Edition)
- Longzhong Info — Fertilizer & Pesticide Price Monitoring (Jun 2026)
- Sunsirs — Pesticide Intermediate Price Data (2026 Q2)
- Asian Development Bank — Central Asia Agricultural Development Trend Report (2025)
- International Trade Centre (ITC) — Trade Map Data Platform
- China Seed Association — 2025 Seed Import & Export Industry Analysis