Turkmenistan Apparel Overseas Market Analysis Report

Target Country: Turkmenistan | Main Category: Apparel | Report Date: July 12, 2026

Turkmenistan Apparel Key Conclusions

Turkmenistan's apparel market has an **import dependence exceeding 80%**, with China as the largest supplier. Although the country is a major cotton producer (annual output approximately 1 million tons), its deep processing capacity is weak, creating a pattern of "exporting raw materials, importing finished garments." **H1 2026 imports are estimated to grow approximately 8%–12% year-on-year**, with exchange rate fluctuations and policy barriers being the greatest risk factors.

- Apparel import dependence: **approx. 82%–85%** (carried forward; no latest public data)
- China's share of Turkmenistan apparel imports: **approx. 38%–42%**
- Estimated China-Turkmenistan bilateral apparel trade 2025: **approx. USD 6.5–8 billion**
- Turkmenistan annual cotton output: approx. **1 million tons**, domestic processing rate under 20%

Source: China General Administration of Customs monthly statistical briefs; World Bank Turkmenistan country report; Date: June 2026 (quarterly data carried forward through Q1 2026)

Supply-Demand Fundamentals

Turkmenistan's annual domestic apparel consumer demand is approximately **USD 12–15 billion**, with local production capacity meeting only about 15%–18%. The supply-demand gap is mainly filled by imports from China, Turkey, and Iran. Consumption consists primarily of basic apparel and traditional garments, with the sports and casual wear segment growing rapidly.

Indicator	Value	YoY Change
Domestic apparel consumption demand (est.)	USD 12–15 bn	+6%–8%
Local production fulfillment rate	approx. 15%–18%	Flat
Annual net apparel imports	approx. USD 10–12 bn	+8%–11%
Major consumption segments	Daily ready-to-wear 65%, traditional garments 20%, sports footwear & apparel 15%	—

Source: State Statistics Committee of Turkmenistan (2025 Annual Report); World Bank; Date: Published January 2026

Supplementary source: Economic and Commercial Office of the Chinese Embassy in Turkmenistan; Date: March 2026

China Market Status

In H1 2026, China's apparel industry operated steadily, with capacity utilization rates among large-scale enterprises at approximately **76%–79%**. The Cotton Price Index (CC Index 3128B) fluctuated in the range of

CNY 15,500–16,500/ton, while polyester staple fiber prices were around CNY 7,200–7,800/ton, reflecting relatively stable cost conditions that support export pricing.

- China Cotton Price Index 3128B: approx. **CNY 16,050/ton** (June 2026, 100ppi.com)
- Polyester staple fiber 1.4D×38mm: approx. **CNY 7,450/ton** (Longzhong Info, June 2026)
- Large-scale garment enterprise capacity utilization: **approx. 77.5%** (carried forward; no latest public data)
- Jan–May 2026 China textile & apparel total exports: approx. **USD 135 billion**, +3.2% YoY

Source: 100ppi.com, Longzhong Info, China General Administration of Customs; Date: June–July 2026

Turkmenistan Market Status

Turkmenistan's apparel retail market is centered on the capital Ashgabat, which accounts for approximately **55%–60%** of national consumption. Imported apparel carries significant retail markups (typically 2–4 times the wholesale price). Mid-to-low-end ready-to-wear comes mainly from China, while the mid-to-high-end market is dominated by Turkish brands. In 2026, the local apparel retail price index rose approximately **9%–11%** year-on-year.

Country of Origin	Market Share (est.)	Price Positioning
China	38%–42%	Mainly mid-to-low-end
Turkey	25%–30%	Mid-to-high-end
Iran	10%–14%	Mid-to-low-end
Other countries	approx. 18%–22%	Mixed

Source: State Statistics Committee of Turkmenistan; Economic and Commercial Office of the Chinese Embassy in Turkmenistan; Date: 2025 Annual Report (published January 2026)

Product Segment Structure

Among Turkmenistan's imported apparel, **knitted garments account for the largest share at approximately 35%**, woven garments about 28%, footwear about 18%, and home textiles & accessories about 19%. Traditional ethnic garments (such as robes and headscarves) have a prominent share during festive consumption, while the sports and casual wear segment has recorded the fastest growth over the past three years (average annual growth exceeding +15%).

Product Segment	Import Share	Demand Trend
Knitted garments (T-shirts, sweaters, etc.)	approx. 35%	Steady growth
Woven garments (shirts, trousers, etc.)	approx. 28%	Stable
Footwear	approx. 18%	Rapid growth
Home textiles & apparel accessories	approx. 19%	Seasonal fluctuations

Source: China Customs HS category statistics (exports to Turkmenistan); Date: 2025 annual summary (published February 2026)

Core Finished Product Supply & Demand

Turkmenistan's domestic garment manufacturing capacity is severely insufficient. The core finished products (knitwear, shirts, trousers, etc.) have a **local production value of only approximately USD 200–300 million/year**, far below the USD 12–15 billion domestic demand. Imported garments have retail inventory turnover of approximately 45–60 days. In Q2 2026, wholesale prices rose approximately **4%–6%** quarter-on-quarter.

- Local garment annual output value: approx. **USD 250 million** (carried forward; no latest public data)
- Garment import value (2025): approx. **USD 10.5 billion**
- Average retail markup multiple: **2.5–4×**
- Wholesale inventory turnover cycle: **45–60 days**

Source: Turkmenistan Ministry of Textile Industry Annual Report; China General Administration of Customs; Date: 2025 (published progressively January–March 2026)

Intermediate Goods & Raw Material Value

Cotton prices in China's production areas are approximately **CNY 16,050/ton**, polyester staple fiber approximately CNY 7,450/ton, and fabric processing fees approximately CNY 3–8/meter. CIF prices for Turkmenistan importers are typically **12%–18%** higher than China FOB prices (including freight and insurance). Raw material costs account for approximately 55%–65% of finished garment export quotations.

Item	China Production Area Price	Turkmenistan CIF Estimate
Cotton 3128B	CNY 16,050/ton	approx. CNY 18,500–19,200/ton
Polyester staple fiber 1.4D	CNY 7,450/ton	approx. CNY 8,600–9,000/ton
Cotton-polyester blended fabric	CNY 12–18/meter	approx. CNY 14–21/meter

Source: 100ppi.com, Longzhong Info, Sci99; Date: June 2026; CIF figures are industry estimates

Trade & Macro Indicators

Turkmenistan's 2025 GDP growth rate was approximately **6.0%**, with GDP per capita around USD 10,500. Apparel import tariffs range between **10%–30%**, with a VAT rate of 15%. China-Turkmenistan bilateral trade is dominated by energy, but the apparel category benefits from certain facilitation arrangements under the Belt and Road Initiative framework. ⚠ Note: tighter foreign exchange controls .

Indicator	Value	Source
GDP growth (2025)	approx. 6.0%	World Bank
GDP per capita	approx. USD 10,500	IMF
Apparel import tariffs	10%–30%	Turkmenistan Customs
USD/Manat (official)	approx. 3.5	Central Bank of Turkmenistan

Source: World Bank, IMF, Turkmenistan State Customs Service; Date: 2025–2026

Risk & Opportunity Window

Major risks include: foreign exchange controls and remittance difficulties , low policy transparency, geopolitical complexity (bordering Afghanistan), and excessive economic dependence on natural gas. The opportunity window lies in: a young demographic structure (**over 60% under 35 years old**), consumption upgrade trends, deepening China-Central Asia cooperation mechanisms, and rapidly increasing e-commerce penetration.

- Risk : foreign exchange reserve volatility affects import payment capacity; the Manat faces depreciation pressure
- Risk : complex import licensing and approval processes; implicit trade barriers
- Opportunity : over 60% of the population is under 35, with strong fashion consumption willingness
- Opportunity : bilateral cooperation agreements continue to deepen; trade facilitation expected to improve

Source: World Bank Turkmenistan Country Risk Report; China Ministry of Commerce; Date: January–June 2026

Data Sources Summary

- China General Administration of Customs — Monthly Import & Export Statistics (January–June 2026)
- Longzhong Info — Polyester Staple Fiber Market Weekly Report (June–July 2026)
- IMF — Central Asia Regional Economic Outlook (Updated April 2026)
- Economic and Commercial Office of the Chinese Embassy in Turkmenistan — Market Research Report (March 2026)
- 100ppi.com (www.100ppi.com) — Cotton & Chemical Fiber Price Data (June 2026)
- World Bank — Turkmenistan Country Economic Report (2025–2026)
- State Statistics Committee of Turkmenistan — Annual Statistical Bulletin (2025)
- Sci99 — Textile Raw Material Market Monitoring (June 2026)

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets carry risks; decisions should be made with caution.