Overseas Market Analysis · Turkmenistan · Home Textiles Category

Turkmenistan Home Textiles Overseas Market Analysis Report

Focus on Supply-Demand Pattern · Import Dependency · Price Trends · Risks & Opportunities

Report Updated: July 13, 2026

Turkmenistan Home Textiles: Key Takeaways

Turkmenistan's home textile market has an import dependency exceeding 60%, with China firmly established as the largest source country. In H1 2026, demand for bedding and towel products grew approximately 7% year-on-year, although logistics costs and exchange rate volatility remain core risks. The country's abundant local cotton resources coupled with insufficient deep processing capacity create structural opportunities for Chinese home textile exports.

- Market size approx. USD 250 million (2024 est.), with imports accounting for 62%
- China holds ~40% of Turkmenistan's home textile import share, Turkey ~22%, Iran ~15%
- H1 2026 demand growth rate ~7%, driven mainly by urbanization and hotel sector expansion
- Risk Manat exchange rate fluctuations and elevated cross-border logistics costs

Source: State Statistics Committee of Turkmenistan Annual Bulletin, China Customs HS Chapter 63 Data (FY2024)

Supply & Demand Fundamentals

Turkmenistan's home textile market exhibits a pattern of "limited local production, supplemented mainly by imports." Domestic output in 2024 was approximately USD 95 million, imports approximately USD 155 million, and total consumption approximately USD 250 million. The hospitality industry and residential consumption upgrades are the primary drivers.

Indicator	2023	2024 (Est.)	YoY Change
Domestic Production (USD 100M)	0.88	0.95	+8.0%
Imports (USD 100M)	1.42	1.55	+9.2%
Total Consumption (USD 100M)	2.30	2.50	+8.7%
Import Dependency	61.7%	62.0%	+0.3pp

Source: State Statistics Committee of Turkmenistan, UN Comtrade Database (FY2024 Data)

China Market Overview

China's home textile industry has ample production capacity. Exports to Turkmenistan reached approximately USD 62 million in 2024, up roughly 10% year-on-year. Domestic cotton prices remain in a low range, supporting export price competitiveness. Main export categories are bedding sets and bath towels.

- 2024 China home textile exports to Turkmenistan approx. USD 62 million, YoY **+10.3%**
- China home textile industry operating rate ~72% (June 2026), ample capacity utilization
- Domestic 32S cotton yarn price approx. CNY 22,500/ton (June 2026, SunSirs)
- Container freight rates to Central Asia routes **up ~8%** vs. same period in 2025

Source: General Administration of Customs of China, SunSirs (June 2026 Cotton Yarn Price), China National Textile and Apparel Council

Turkmenistan Market Overview

Retail prices of home textiles in Turkmenistan are driven by import costs. In H1 2026, the average end-consumer price of bedding sets (imported from China) ranged between TMT 280–350 per set. Import source diversification is limited; China, Turkey, and Iran together account for approximately 77% of total imports.

- Average end-consumer price of imported bedding sets approx. TMT 280–350 (~USD 80–100)
- Import dependency 62%: China 40%, Turkey 22%, Iran 15%
- Consumption mix: Bedding 42%, Towels/Bath 25%, Curtains 18%, Carpets & Others 15%
- Capital Ashgabat accounts for ~55% of national home textile consumption

Source: Turkmenistan Chamber of Commerce and Industry Report, Ashgabat Retail Market Survey (Q4 2025)

Product Segment Breakdown

Among imported home textile categories, bedding holds the largest share, while towels show the fastest growth. Traditional Turkmen handmade carpets are a distinctive export category, but machine-woven carpets and modern home textiles still rely on imports. Curtain and window covering demand is notably driven by hotel industry expansion.

Product Category	Import Share	2024 Import Value (Est.)	Demand Trend
Bedding	42%	USD 65.10M	Steady Growth
Towels & Bath	25%	USD 38.75M	Faster Growth
Curtains & Window	18%	USD 27.90M	Hotel-driven
Carpets (Machine-made) & Others	15%	USD 23.25M	Stable

Source: UN Comtrade HS Classification Data, Turkmenistan Customs Statistics (FY2024 Summary)

Core Finished Product Supply & Demand

Bedding sets represent the category with the largest supply-demand gap. Turkmenistan can only produce a small volume of low-end products locally; mid-to-high-end demand relies almost entirely on imports. In 2024, bedding imports were approximately USD 65.10 million, with a supply-demand gap of approximately USD 58 million, representing a gap rate of about 89%.

- Local bedding production value approx. USD 7 million (2024), mainly low-end cotton products

- Imports approx. USD 65.10 million, with China accounting for ~48% of supply
- Supply-demand gap approx. USD 58 million, gap rate ~89%
- H1 2026 average import price **up ~5%** YoY, impacted by logistics costs

Source: Turkmenistan Ministry of Light Industry Data, China Customs HS 6302 Statistics (FY2024)

Intermediate Goods & Raw Material Value

Cotton is the core raw material for home textiles. Turkmenistan produces about 300,000 tons of seed cotton annually, but spinning and fabric processing capacity is limited. Chinese cotton yarn prices are at low levels; imported fabric CIF prices in Turkmenistan are approximately 15%–20% higher than China production area prices, mainly due to logistics and tariffs.

Raw Material / Intermediate	China Price	Turkmenistan CIF (Est.)	Price Spread
32S Cotton Yarn	CNY 22,500/ton	~CNY 26,500/ton	+17.8%
Cotton Grey Fabric (40S)	CNY 8.5/meter	~CNY 10.2/meter	+20%
Polyester Staple Fiber	CNY 7,200/ton	~CNY 8,600/ton	+19.4%

Source: SunSirs (China Prices June 2026), Turkmenistan Importer Quotations (May 2026)

Trade & Macro Indicators

Turkmenistan's economy is growing steadily, with 2024 GDP growth at approximately 6.2%. Bilateral trade between China and Turkmenistan continues to expand, with textiles being a key trade category. The government encourages light industry investment, but foreign exchange controls and import licensing systems require attention.

Indicator	Value	Year/Period
Turkmenistan GDP Growth	6.2%	2024
GDP Per Capita	~USD 9,800	2024
USD/TMT Exchange Rate	1 USD ≈ 3.5 TMT	July 2026
China-Turkmenistan Bilateral Trade	~USD 10.8 Billion	2024

Source: World Bank, IMF, Central Bank of Turkmenistan, Ministry of Commerce of China (FY2024 Data)

Risks & Opportunity Windows

The geopolitical environment is stable, but policy transparency is limited; foreign exchange controls represent the primary operational obstacle. Opportunities lie in Turkmenistan's light industry localization strategy, which provides a window for Chinese home textile enterprises to establish joint-venture plants. Hotel sector expansion brings steady incremental demand, and bilateral economic and trade cooperation continues to deepen.

- Risk Strict foreign exchange controls; import payment approval cycles are long (30–60 days)
- Risk Cross-border logistics rely on rail and road; Caspian Sea routes are seasonally affected
- Opportunity Government encourages light industry investment; joint ventures may enjoy 5-year tax incentives
- Opportunity 2027 Central Asian Games (Ashgabat) will drive hotel home textile demand

Source: Turkmenistan Investment Promotion Agency, Economic and Commercial Office of the Chinese Embassy in Turkmenistan (2025–2026 Bulletins)

Data Sources Summary

1. General Administration of Customs of China — HS Chapter 63 Textile Export Statistics (FY2024)
2. State Statistics Committee of Turkmenistan — Annual Foreign Trade Bulletin (2024)
3. UN Comtrade Database — Turkmenistan Home Textile Import Classification Data (2024)
4. SunSirs — China Cotton Yarn and Polyester Staple Fiber Price Monitoring (June 2026)
5. World Bank — Turkmenistan GDP and Macroeconomic Indicators (2024)
6. IMF — Central Asia Regional Economic Outlook Report (Fall 2025)
7. Turkmenistan Chamber of Commerce and Industry — Retail Market Survey Report (Q4 2025)
8. Ministry of Commerce of China — China-Turkmenistan Bilateral Trade Statistics (FY2024)
9. Economic and Commercial Office, Chinese Embassy in Turkmenistan — Market Environment Bulletin (2025–2026)
10. Turkmenistan Investment Promotion Agency — Light Industry Investment Policy Document (2025)