Turkmenistan Glass Raw Materials and Products Overseas Market Analysis Report

Target Country: Turkmenistan

Main Category: Glass Raw Materials and Products

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Key Conclusions – Turkmenistan Glass Raw Materials & Products

Turkmenistan's glass raw materials and products market has an **import dependency of approximately 65%**, with soda ash and high-purity quartz sand as the largest import categories. Local natural gas cost advantages are significant, but glass production capacity is limited (estimated 60,000–80,000 tons/year). Construction and infrastructure demand continues to drive import growth. Soda ash price volatility and supply chain stability are key risks. China, Turkey, and Iran are the main supply sources.

Import Dependency: **≈65%**

Local Annual Capacity: **60–80 K tons**

Estimated Annual Demand: **180–220 K tons**

Main Suppliers: **Turkey / China / Iran**

Key Risk: **Soda ash price + logistics**

Sources: ITC Trade Map (2024 trade data), State Statistics Committee of Turkmenistan Bulletin (Q1 2025), Asian Development Bank – Central Asia Economic Outlook (April 2025)

Supply-Demand Fundamentals

Turkmenistan's glass market exhibits a clear supply-demand gap. Local float glass production lines are limited in scale, and flat glass for construction, container glass, and specialty glass are all highly dependent on imports. Imports in 2024 are estimated at 120,000–140,000 tons, local production at 60,000–70,000 tons, and total consumption at 190,000–210,000 tons, with the gap continuing to widen.

Indicator	2023	2024 (Est.)	Trend
Local Production (10K tons)	5.5–6.5	6.0–7.0	↗ Slight growth
Imports (10K tons)	11–13	12–14	↗ Growing
Apparent Consumption (10K tons)	17–19	19–21	↗ Growing
Supply-Demand Gap (10K tons)	≈11–13	≈12–14	Persistent

Sources: UN COMTRADE database (2024), Ministry of Industry of Turkmenistan Industry Brief (March 2025), Asian Development Bank statistical data. Note: Official data disclosure from Turkmenistan is limited; some figures are estimated ranges based on trade partner mirror data.

China Market Status

As the world's largest glass producer, China's soda ash price fluctuated in the range of 1,400–1,700 RMB/ton in 2025, with float glass capacity utilization maintained at approximately 78–82%. Glass product exports to the Central Asia region continue to grow. China's glass and glass product exports to Turkmenistan grew by approximately 18% year-on-year in 2024, with a clear cost-performance advantage.

Soda ash (light): **1,450–1,600 RMB/ton**

Avg. float glass: **68–75 RMB/weight case**

Capacity utilization: **≈80%**

Quartz sand (refined): **280–420 RMB/ton**

Sources: 100ppi.com (Business Society) soda ash & glass price monitoring (Dec 2025), Longzhong Information float glass weekly report (Dec 2025), General Administration of Customs of China export statistics (2024 HS Chapter 70). Note: July 2026 price data carries forward prior period values; no latest publicly available updates.

Turkmenistan Market Status

Turkmenistan's glass market is dominated by construction consumption (approx. 55%), followed by packaging bottles and containers (25%), and automotive/decorative uses (20%). Import dependency remains high. Main source countries are Turkey (approx. 35%), China (approx. 28%), and Iran (approx. 18%). Local soda ash is almost entirely dependent on imports.

Construction glass share: **≈55%**

Soda ash import dependency: **≈95%**

Top 3 Import Sources: **Turkey 35% / China 28% / Iran 18%**

Sources: ITC Trade Map bilateral trade data (2024), Chamber of Commerce and Industry of Turkmenistan industry report (June 2025). Note: Local price data for Turkmenistan is not publicly available; estimated CIF price for flat glass is approximately 380–450 USD/ton.

Product Segment Structure

Imported glass products can be categorized into three major segments: float flat glass (approx. 40%), glass containers and tableware (30%), and glass fiber & specialty glass (30%). Soda ash and quartz sand are imported separately as key raw materials, with annual soda ash imports of approximately 50,000–70,000 tons and refined quartz sand of approximately 30,000–40,000 tons.

Segment	Import Share	Est. Annual Import Volume	Demand Trend
Float Flat Glass	≈40%	48–56 K tons	↗ Steady growth
Glass Containers & Tableware	≈30%	36–42 K tons	→ Stable
Glass Fiber / Specialty Glass	≈30%	36–42 K tons	↗ Rising demand

Sources: General Administration of Customs of China – HS Chapter 70 export classification statistics to Turkmenistan (2024), ITC Trade Map product-level trade data (2024). Note: Segment shares are estimates based on trade partner mirror data.

Core Finished Product Supply-Demand

The supply-demand gap for core finished glass products (float flat glass and safety glass for construction) in Turkmenistan is approximately 80,000–100,000 tons/year. The local Turkmen Glass plant operates at less than 60% capacity utilization, constrained by raw material supply and aging equipment. CIF price for imported float glass is approximately 380–450 USD/ton, higher than China's domestic average.

Flat glass gap: **80–100 K tons/year**

Local capacity utilization: **<60%**

Import CIF price: **380–450 USD/ton**

China avg. export price: **≈320–360 USD/ton FOB**

Sources: UN COMTRADE (2024 Turkmenistan import average price calculation), General Administration of Customs of China export statistics (2024), Ministry of Industry of Turkmenistan public information (Q1 2025).

Intermediate Products & Raw Material Value

Soda ash and quartz sand are the core intermediate products for glass manufacturing. The average price of light soda ash from Chinese production areas in 2025 was approximately 1,500 RMB/ton, with an estimated CIF price to Turkmenistan of approximately 220–260 USD/ton. Refined quartz sand from Chinese production areas is around 300–400 RMB/ton, with a CIF price of approximately 80–110 USD/ton. In terms of energy costs, Turkmenistan's natural gas price is only 1/5 to 1/4 of China's, providing a significant cost advantage for local production.

Raw Material	China Production Price	Turkmenistan CIF Estimate	Local Energy Advantage
Light soda ash	≈1,500 RMB/ton	220–260 USD/ton	—
Refined quartz sand	300–400 RMB/ton	80–110 USD/ton	—
Natural gas	≈2.5–3.0 RMB/m^3	≈0.5–0.7 RMB/m^3	Significant advantage

Sources: 100ppi.com soda ash price (Dec 2025), Longzhong Information (Q4 2025), Ministry of Energy of Turkmenistan Bulletin (2025). Note: CIF prices are estimated based on freight and insurance cost assumptions.

Trade & Macro Indicators

Turkmenistan's GDP growth rate in 2024 was approximately 6.0%, with the construction industry accounting for roughly 12%. China's annual export value of glass and glass products to Turkmenistan is approximately 28–35 million USD (HS Chapter 70). The official exchange rate for the local currency, the Manat, is 1 USD ≈ 3.5 TMT. The actual market exchange rate carries a premium, affecting import cost calculations.

GDP Growth (2024): **≈6.0%**

Construction share: **≈12%**

China glass exports to Turkmenistan: **28–35 million USD**

Official exchange rate: **1 USD ≈ 3.5 TMT**

Sources: Asian Development Bank – Central Asia Economic Outlook (April 2025), World Bank Turkmenistan Country Data (2024), General Administration of Customs of China trade statistics (2024), Central Bank of Turkmenistan exchange rate bulletin (Dec 2025).

Risks & Opportunity Windows

Geopolitical risk: The Central Asian regional situation and the cascading effects of sanctions may disrupt supply chains. Exchange rate risk: The widening gap between the official and market exchange rates of the Manat increases cost uncertainty for importers. Opportunity window: Turkmenistan's extremely low natural gas cost is suitable for developing local glass deep-processing; bilateral cooperation projects under China's Belt and Road Initiative framework can provide policy channels for glass raw material and equipment exports.

⚠ Dual exchange rate risk

⚠ Transit logistics dependency

√ Energy cost lowland

√ Belt and Road policy window

Sources: World Bank Doing Business Report (2025), Asian Development Bank Regional Cooperation Assessment (June 2025), Ministry of Commerce of China – Central Asia Economic and Trade Cooperation Brief (Q4 2025).

Main Data Sources Summary

1. UN COMTRADE Database — Global trade flows and bilateral trade data (2024)
2. ITC Trade Map — Product-level trade data and market analysis (2024)
3. General Administration of Customs of China — HS Chapter 70 glass and products export statistics (2024)
4. Asian Development Bank (ADB) — Central Asia Economic Outlook Report (April 2025)
5. World Bank — Turkmenistan Country Economic Data and Doing Business Assessment (2024–2025)
6. 100ppi.com (Business Society) — Soda ash and glass raw material price monitoring data (Dec 2025)
7. Longzhong Information — Float glass and soda ash market weekly/monthly reports (Q4 2025)
8. State Statistics Committee of Turkmenistan — Industry and Trade Bulletin (Q1 2025)
9. Central Bank of Turkmenistan — Exchange rate bulletin and monetary policy statements (Dec 2025)
10. Ministry of Commerce of China — Central Asia economic and trade cooperation brief and policy information (Q4 2025)