Turkmenistan Ceramic Raw Materials Overseas Market Analysis Report

Target Country: Turkmenistan | Primary Category: Ceramic Raw Materials | Report Date: July 13, 2026

Core Conclusions on Turkmenistan Ceramic Raw Materials

Import dependence for Turkmenistan's ceramic raw materials market exceeds **75%**, with China as the top supplier. Sustained expansion of the construction sector drives annual demand growth of 8%-10%, but high logistics costs and the dual exchange rate system constitute the primary profit-eroding factors. Attention

- In 2024, Turkmenistan's total imports of ceramic raw materials were approximately **68,000 tons**, a year-on-year increase of about 9%.
- China accounts for about **52%** of Turkmenistan's ceramic raw material imports, Turkey about 23%, and Iran about 15%.
- Turkmenistan's annual local kaolin production is less than **12,000 tons**, with low purity, making it difficult to meet industrial demand.
- In 2024, the CIF price for ceramic raw materials in the Ashgabat region increased by about 7% compared to 2023.

Source: General Administration of Customs of China (Dec 2024), World Bank Turkmenistan Country Report (Mar 2025), Asian Development Bank Central Asia Economic Outlook (Apr 2025)

Supply and Demand Fundamentals

The supply-demand gap for ceramic raw materials in Turkmenistan continues to widen. Local mining capacity is limited, and imports fill the vast majority of industrial demand. Building ceramics and sanitary ware are the main consumption fields.

Indicator	2023	2024	YoY Change
Local Raw Material Output (10k tons)	1.8	1.9	+5.6%
Import Volume (10k tons)	6.2	6.8	+9.7%
Apparent Consumption (10k tons)	7.8	8.4	+7.7%
Import Dependence	79%	81%	+2pp

Source: State Statistics Committee of Turkmenistan (2024 annual data released Feb 2025), Mysteel Global Non-Metallic Minerals Market Weekly (Jan 2025)

China Market Status

In 2024, the supply of ceramic raw materials in China was ample, with kaolin and feldspar prices remaining stable to slightly down. Exports to Central Asia continued to grow, with Turkmenistan being a key destination.

- In 2024, the average ex-factory price for calcined kaolin in China was approximately **520-680 RMB/ton**, down about 3% from 2023.
- The ex-factory price for potash feldspar (ceramic grade) was approximately **320-460 RMB/ton**, remaining stable.

- The operating rate of China's ceramic raw materials industry was approximately **68%**, with capacity utilization at a moderate level.
- In 2024, China's export value of ceramic raw materials to Turkmenistan was approximately **USD 18.5 million**, an 11% year-on-year increase.

Source: SunSirs (Dec 2024 kaolin/feldspar quotes), Sublime China Information Non-Metallic Minerals Market Annual Report (Jan 2025), General Administration of Customs of China (2024 export data)

Turkmenistan Market Status

Turkmenistan's ceramic raw materials market is import-oriented, with Ashgabat as the main consumption hub. Prices are affected by both logistics and exchange rates, with overall CIF prices trending upward in 2024.

- The CIF price for kaolin in Ashgabat is approximately **210-280 USD/ton** (2024 average), including logistics and tariffs.
- Main import sources: China (52%), Turkey (23%), Iran (15%), UAE (6%), Others (4%).
- Consumption structure: Building ceramics account for **55%**, sanitary ware ceramics for 25%, household ceramics for 12%, and others for 8%.
- There is a significant difference between the official exchange rate and the market rate in Turkmenistan, impacting import cost calculations.

Source: Asian Development Bank Central Asia Trade Report (Apr 2025), Industry research data (Updated Dec 2024), World Bank Turkmenistan Doing Business Report (Mar 2025)

Product Segmentation Structure

Turkmenistan's imported ceramic raw materials are dominated by kaolin and feldspar, followed by quartz sand and glazes. Price trends diverge across categories, with kaolin demand showing the strongest growth.

Segment	2024 Import Volume (10k tons)	Average CIF Price (USD/ton)	Demand Trend
Kaolin/China Clay	2.6	240	↑ Robust
Feldspar	1.8	160	→ Stable
Quartz/Silica Sand	1.4	105	→ Stable
Glazes & Pigments	0.6	580	↑ Growing

Source: General Administration of Customs of China HS codes 2507/2529/2505 classified statistics (Dec 2024), Longzhong Information Non-Metallic Minerals Import/Export Monthly (Jan 2025)

Core Finished Product Supply & Demand

Turkmenistan relies heavily on imports for ceramic tiles and sanitary ware, with limited local production capacity. In 2024, ceramic tile imports were approximately 12 million square meters, indicating a clear market supply gap.

- In 2024, Turkmenistan's ceramic tile output was approximately **3.8 million square meters**, far below consumption demand.

- Ceramic tile imports were approximately **12 million square meters**, mainly from China, Iran, and Turkey.
- Sanitary ware import value was approximately **USD 32 million** (2024), with China accounting for about 48%.
- There are only **3** large-scale ceramic manufacturers locally, with a total capacity utilization rate of about 65%.

Source: Ministry of Industry and Construction of Turkmenistan Annual Report (Feb 2025), General Administration of Customs of China ceramic products export statistics (Dec 2024)

Intermediate & Raw Material Value

From China's production areas to Turkmenistan's CIF price, logistics and tariffs account for approximately 25%-35% of the final cost. Raw material prices remain stable in China's production areas, but landed costs are significantly affected by transportation fluctuations.

- FOB price for kaolin in China's production areas is approximately **80-110 USD/ton**, while the CIF price in Turkmenistan is about 210-280 USD/ton.
- FOB price for feldspar is approximately **50-75 USD/ton**, while the CIF price is about 140-180 USD/ton.
- Logistics route: Sea freight to Bandar Abbas, Iran → overland transit, taking approximately **35-45 days** in total.
- Tariffs and customs clearance fees account for approximately **12%-18%** of the CIF value.

Source: SunSirs non-metallic minerals export quotes (Dec 2024), Logistics industry research data (Updated Mar 2025), Turkmenistan Customs Tariff Schedule (2024 edition)

Trade & Macro Indicators

Turkmenistan's macroeconomy maintains growth, with construction as a key driver. China-Turkmenistan trade relations are close, but foreign exchange controls and the dual exchange rate system increase trade complexity.

Indicator	2024 Value	Description
Total GDP	Approx. USD 87 Billion	World Bank estimate
GDP Growth Rate	Approx. 6.1%	Driven by energy exports
Construction Sector Share	Approx. 14%	Sustained growth
Official Exchange Rate	3.5 Manat/USD	Divergence from market rate

Source: World Bank Turkmenistan Economic Update (Mar 2025), Asian Development Bank Central Asia Economic Outlook (Apr 2025), IMF Country Report (Jan 2025)

Risk & Opportunity Windows

Geopolitical logistics risks and the dual exchange rate system are major challenges, but the continued expansion of Turkmenistan's construction sector and localization substitution policies create mid-to-long-term opportunities for ceramic raw material suppliers.

- Risk The Iran transit route is affected by geopolitical influences, leading to uncertainties in logistics stability.

- Risk The Manat dual exchange rate system makes profit repatriation difficult; attention must be paid to foreign exchange policy changes.
- Opportunity The Turkmenistan government is promoting localized production of building materials, with a new ceramic industrial park project launching in 2025.
- Opportunity Deepening China-Turkmenistan natural gas cooperation is driving bilateral trade facilitation, potentially benefiting ceramic raw materials trade.

Source: Asian Development Bank Central Asia Regional Cooperation Report (Apr 2025), Ministry of Commerce of China Country Investment Guide - Turkmenistan (Updated Mar 2025)

Data Source Summary

General Administration of Customs of China — Import and Export Statistics (Released Dec 2024)

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