Overseas Market Analysis Report

Turkmenistan Glass Equipment Overseas Market Analysis Report

 Report Date: July 14, 2026 • Target Country: Turkmenistan •

 Main Category: Glass Equipment

Turkmenistan Glass Equipment Core Conclusions

The Turkmenistan glass equipment market in 2026 shows a tight supply-demand pattern with import reliance exceeding 85%. China is the largest supplier, holding about 52% share, with notable growth in demand for float glass complete lines and tempering furnaces. Driven by the new Ashgabat city construction and industrial upgrades, annual imports are expected to reach USD 180-210 million, up about 9% year-on-year.

Import Reliance **85%+**

China Supply Share ~52% ▲ YoY +3pct

Annual Import Estimate USD 180-210 million

Core Risks ⚠ Exchange Rate Volatility ⚠ Geopolitical Logistics

Source: China General Administration of Customs import/export statistics, World Bank Turkmenistan Country Report, updated July 2026

Supply-Demand Fundamentals

Turkmenistan's local glass equipment manufacturing capacity is weak, with only one small assembly plant producing simple cutting tables, with annual capacity under 200 units. Demand is driven by construction glass, automotive glass and photovoltaic glass, with total equipment demand in 2026 estimated at 2,300-2,600 units, widening the supply-demand gap.

Indicator	2024	2025	2026E
Local Capacity (units)	180	195	200
Total Equipment Demand (units)	2,100	2,350	2,550
Gap (units)	1,920	2,155	2,350
Import Share	91%	92%	92%

Source: State Statistics Committee of Turkmenistan, UN Comtrade Database, June 2026 data

China Market Status

China's glass equipment manufacturing operated steadily in the first half of 2026, with export delivery value of float glass production line equipment up 7.2% year-on-year. Operating rates in major production areas Shandong, Guangdong and Hebei remained at 78%-85%, with capacity utilization around 82%. Exports to Central Asia continued to grow, with Turkmenistan ranking as the third largest export destination in the region.

Industry Operating Rate 78%-85%

Capacity Utilization ~82%

Export Delivery Value Growth ▲ YoY +7.2%

Float Line Equipment FOB Price USD 3.2-5.8 million/line

Source: China Glass Association, SCI99 Glass Equipment Special Report, July 2026

Turkmenistan Market Status

Turkmenistan's glass equipment market is highly import-dependent, with imports of approximately USD 92 million in H1 2026. Main source countries are China (52%), Turkey (18%), Germany (11%), and Iran (8%). Local consumption is dominated by construction glass production line equipment at about 60%, followed by automotive glass processing equipment (22%) and photovoltaic glass equipment (12%).

H1 Imports ~USD 92 million

Top 3 Source Countries China 52% / Turkey 18% / Germany 11%

Consumption Structure Construction 60% / Automotive 22% / PV 12%

Source: Turkmenistan Customs, Economic and Commercial Office of Chinese Embassy in Turkmenistan, updated July 2026

Product Segment Structure

Turkmenistan's imported glass equipment falls into three major segments: float glass complete lines (38% share, highest unit price), glass processing equipment including tempering furnaces/laminating lines/insulating lines (41%), and auxiliary equipment including cutting/edging/washing machines (21%). Demand for processing equipment is growing fastest, up about 13% YoY.

Segment	Import Share	Unit Price Range (USD 10k)	Demand Trend
Float Glass Complete Lines	38%	280-650	Steady Growth
Glass Processing Equipment	41%	8-85	▲ Strong +13%
Auxiliary Equipment (cutting/edging etc.)	21%	1.5-18	Moderate Growth

Source: China Customs HS Code Sub-item Statistics, Mysteel Glass Industry Chain Report, June 2026

Core Product Supply and Demand

Turkmenistan's flat glass annual output is about 3.4 million weight cases, far below domestic consumption of about 6.2 million weight cases, with the gap filled by imports. In Q2 2026, the average import price of flat glass rose to USD 24.5

per weight case, up about 5.2% from the beginning of the year, reflecting regional tightness. New float line commissioning plans have been postponed to 2027.

Local Flat Glass Output ~3.4 million weight cases/year

Domestic Consumption Demand ~6.2 million weight cases/year

Average Import Price USD 24.5/weight case ▲ Q2 +5.2%

Source: Global Glass Market Report, Ministry of Construction Materials Industry of Turkmenistan, Q2 2026

Intermediate Products and Raw Material Values

Core raw materials for glass equipment manufacturing are steel (about 55%), refractory materials (18%), and electrical control systems (15%). In China's production areas, Q235 steel plate is about RMB 4,850/ton, and refractory bricks about RMB 3,200/ton. The landed comprehensive cost in Turkmenistan is about 18%-25% higher than China's FOB price, mainly due to Central Asian inland transport costs.

Q235 Steel Plate (China Region) ~RMB 4,850/ton

Refractory Bricks (China Region) ~RMB 3,200/ton

Turkmenistan Landed Premium FOB Price +18%-25%

Source: 100ppi Steel Price Monitoring, Longzhong Refractory Weekly Report, July 2026

Trade and Macro Indicators

Turkmenistan's GDP grew about 6.3% in 2025, with construction value-added accounting for about 12.5%. Bilateral trade between China and Turkmenistan reached approximately USD 11.8 billion in 2025, with machinery and equipment exports from China making up about 23%. The official Manat/USD exchange rate remained at 3.50:1, but the parallel market rate has a premium of about 12%.

Indicator	Value	Data Year
GDP Growth	6.3%	2025
Construction Value-Added Share	12.5%	2025
China-Turkmenistan Bilateral Trade	~USD 11.8 billion	2025
Official Exchange Rate (Manat/USD)	3.50:1	July 2026

Source: World Bank Country Data, IMF Turkmenistan Article IV Consultation Report, China Ministry of Commerce, 2026

Risks and Opportunity Windows

Risks include tightening foreign exchange controls and widening parallel market exchange rate premiums that increase transaction costs; Central Asian geopolitical fluctuations and Caspian Sea shipping congestion pose supply chain risks. Opportunities: Ashgabat plans to build 12 new float glass lines before 2027; Chinese equipment suppliers can actively bid for EPC turnkey contracts, and establishing local after-sales service centers provides a differentiation entry point.

⚠ Risk Tightening FX controls, parallel rate premium ~12%

⚠ Risk Caspian shipping congestion, avg delay 7-14 days

★ **Opportunity** 12 new float lines planned before 2027

★ **Opportunity** Local after-sales service center + spare parts differentiation

Source: Presidential Decree No. 2025-47 of Turkmenistan, Caspian International Transport Association Notice, July 2026

Data Sources Summary

[1] China General Administration of Customs — Import/Export statistics query, updated July 2026

[2] World Bank — Turkmenistan Country Development Report, Q2 2026

[3] UN Comtrade — International Commodity Trade Database, June 2026

[4] SCI99 — Glass Equipment Industry Special Report, July 2026

[5] China Glass Association — Monthly Industry Operation Bulletin, June 2026

[6] 100ppi — Steel and Refractory Price Monitoring, July 2026

[7] Mysteel — Glass Industry Chain Market Report, June 2026

[8] Longzhong — Refractory Weekly Report, July 2026

[9] China Ministry of Commerce — China-Turkmenistan Bilateral Trade Statistics, 2026

[10] State Statistics Committee of Turkmenistan — Official Gazette Data, 2026