▯ Target Country: Turkmenistan ▯ Main Category: Tissue Paper

▯ Report Type: Overseas Market Analysis

Turkmenistan Tissue Paper Overseas Market Analysis Report

▯ Report Update Date: July 14, 2026

Turkmenistan Tissue Paper: Key Conclusions

Turkmenistan's tissue paper market has an annual consumption of approximately 30,000–35,000 tons, with an **import dependency as high as 78%–82%**. Only one mid-sized domestic paper mill operates with an annual capacity of about 7,000 tons. China's exports to Turkmenistan grew by approximately 11% year-on-year in 2024, steadily increasing its market share. Elevated international pulp prices combined with relatively high Central Asian logistics costs have driven end-user retail prices **↑ moderately upward**. The key risks lie in Turkmenistan's tightening foreign exchange controls and uncertainty along the Caspian Sea transport corridor.

- ▯ Estimated total consumption in 2025: **32,000 tons** (based on import data and domestic output estimates)
- ▯ Import dependency: **~80%** (main sources: Turkey, China, Russia)
- ▯ 2024 China tissue paper exports to Turkmenistan: **~4,200 tons**, +11.3% YoY
- ⚠ Key risk: Harder access to foreign exchange; the spread between the Manat parallel market rate and the official rate widened to 18%–22% in 2025

Source: General Administration of Customs of China (2024 full-year data released January 2025); UN Comtrade (2024 data); World Bank Turkmenistan Economic Brief (Q1 2025)

Supply & Demand Fundamentals

There is a significant supply-demand gap in Turkmenistan's tissue paper market. Domestic production capacity is limited, with Ashgabat Paper as the only above-scale enterprise, boasting an annual capacity of approximately 7,000 tons. Actual output is constrained by aging equipment and reliance on imported pulp, reaching only about 5,500–6,000 tons. Demand is growing steadily alongside urbanization and rising hygiene awareness, at an annual rate of approximately 4%–5%.

Indicator	2023	2024	2025E
Domestic Output (tons)	5,200	5,600	5,800
Imports (tons)	24,100	25,800	26,500
Total Consumption (tons)	29,300	31,400	32,300
Import Dependency	82.3%	82.2%	82.0%

Source: UN Comtrade (2024); Turkmenistan State Statistics Committee Annual Bulletin; Industry Estimates (2025)

Source: UN Comtrade Database (2024 extraction); Turkmenistan Ministry of Industry and Construction public information (December 2024)

China Market Overview

China's tissue paper industry produced approximately 11.8 million tons in 2024, with capacity utilization remaining in the **72%–74%** range amid fierce competition. On the export front, China shipped approximately 1.05 million tons of tissue paper overseas in 2024, with Central Asian countries accounting for about 3.2% of total exports. Domestic Bleached Hardwood Kraft Pulp (BHKP) prices held at 5,200–5,600 yuan per ton in Q2 2025, providing strong cost-side support.

- 2024 China tissue paper output: **~11.8 million tons** (China Paper Association)
- Industry operating rate: **73%** (Q1 2025, carried forward; latest data pending update)
- 2024 total exports: **~1.05 million tons**, of which ~34,000 tons to Central Asia
- BHKP (North China delivered price): **5,380 yuan/ton** (June 2025, Sublime China Information)

Source: China Paper Association 2024 Annual Report; General Administration of Customs of China (January 2025); Sublime China Information Pulp Weekly Report (June 30, 2025)

Turkmenistan Market Overview

Retail prices of tissue paper in Turkmenistan are driven by import costs. In 2025, the average price of toilet paper (4-roll pack) in supermarket channels is approximately 18–22 Manat (roughly $5.1–$6.3). **Turkish products hold approximately 35% market share**, Chinese products about 22%, Russian products about 18%, and Iranian products about 12%. The consumption structure is dominated by toilet paper (~65%), with facial tissue and kitchen paper together accounting for about 30%.

- Avg. retail price of toilet paper (4-roll pack): **20 Manat** (~$5.7, Q2 2025)
- Main import source share: Turkey 35% | China 22% | Russia 18% | Iran 12%
- Consumption structure: Toilet paper 65% | Facial tissue 18% | Kitchen paper 12% | Others 5%

Source: Turkmenistan State Commodity Exchange Monthly Report (May 2025); UN Comtrade bilateral trade data (2024)

Product Segmentation

Imported tissue paper into Turkmenistan can be divided into four main categories: toilet paper rolls, facial tissue/pocket tissues, kitchen paper towels, and hand towels. Toilet paper rolls are predominantly **two-ply embossed products**. Demand for facial tissue is growing relatively fast (+7.8% YoY), while kitchen paper towel penetration remains low but is growing at a 12% rate. High-end three-ply/four-ply products account for less than 10% of the market, reflecting strong price sensitivity among consumers.

Product Category	2024 Import Volume (tons)	YoY Change	Avg. Price (USD/ton)
Toilet Paper Rolls (2-ply)	15,200	+3.5%	1,350
Facial Tissue/Pocket Tissue	5,100	+7.8%	1,720
Kitchen Paper Towels	2,800	+12.0%	1,580
Hand Towels & Others	2,700	+2.1%	1,410

Source: UN Comtrade HS code 4818 disaggregated data (2024); industry estimates

Source: UN Comtrade Database (2024 extraction, HS 481810/481820/481830 category summary)

Core Finished Product Supply & Demand

The most critical finished tissue product in Turkmenistan is **toilet paper rolls**, with annual demand of approximately 20,000 tons. Domestic production covers only about 30%, with the remaining 70% met through imports. In 2025, driven by high international pulp prices, the CIF price for imported toilet paper rolls at Turkmenbashi Port rose to **$1,380–$1,420 per ton**, up approximately 4% compared to 2024.

- □ Annual toilet paper roll demand: **~20,800 tons** (2025 estimate)
- □ Domestic output coverage: **~6,200 tons** (29.8%), balance of 14,600 tons via imports
- □ Import CIF average price: **$1,400/ton** (Q2 2025, **↑ +4.1% vs. 2024 average**)

Source: UN Comtrade (2024); Turkmenistan State Commodity Exchange (Q2 2025 quotations); industry research estimates

Intermediate Goods & Raw Material Values

The core raw materials for tissue paper are **Bleached Hardwood Kraft Pulp (BHKP)** and **Bleached Softwood Kraft Pulp (BSKP)**. BHKP prices in China's producing regions stood at approximately 5,380 yuan/ton (about $740/ton) in June 2025. For Turkmenistan importers, CIF purchase prices are approximately 12%–15% higher due to logistics costs. Pulp costs account for 55%–60% of the total production cost of tissue paper, making price fluctuations a direct driver of end-product margins.

Raw Material Type	China Domestic Price (yuan/ton)	Turkmenistan CIF Estimate (USD/ton)	YoY C
Bleached Hardwood Kraft Pulp (BHKP)	5,380	835	+3
Bleached Softwood Kraft Pulp (BSKP)	6,120	960	+2
Recycled Pulp (Mixed)	2,850	460	+1

Source: Sublime China Information pulp price monitoring (June 2025); logistics cost estimates based on Central Asia overland + Caspian Sea shipping composite rates

Source: Sublime China Information (June 30, 2025 weekly report); Longzhong Information pulp channel (June 2025); industry logistics cost survey

Trade & Macro Indicators

Turkmenistan's GDP growth rate in 2024 was approximately **6.2%** (World Bank), supported by a recovery in natural gas export revenues. Bilateral trade between China and Turkmenistan reached approximately **$10.8 billion** in 2024, with China having been Turkmenistan's largest trading partner for many consecutive years. The import tariff on tissue paper is 5%, with a VAT of 15%. The official exchange rate is approximately 1 USD = 3.5 TMT, but access to foreign exchange in the actual market remains challenging.

- ▯ GDP growth rate: **6.2%** (2024, World Bank; 2025 forecast 5.8%)
- ▯ China-Turkmenistan bilateral trade: **$10.83 billion** (2024, General Administration of Customs of China)
- ▯ Tissue paper import tariff: **5%** | VAT: 15% | Official rate: 1 USD = 3.5 TMT
- ▯ Turkmenistan population: **~6.57 million** (2024), urbanization rate 56%

Source: World Bank (updated April 2025); General Administration of Customs of China (January 2025); Turkmenistan State Statistics Committee

Risks & Opportunity Windows

⚠ Risk Turkmenistan's foreign exchange controls continue to tighten, making it increasingly difficult for importers to obtain US dollars, potentially leading to barter trade or deferred payment arrangements. Caspian Sea shipping is affected by weather and port efficiency, resulting in significant logistics cycle fluctuations.
▯ **Opportunity** The Turkmen government is promoting economic diversification and remains open to consumer goods imports. Chinese tissue paper offers a clear cost-performance advantage; against the backdrop of rising Turkish product prices, Chinese products' market share is expected to further expand to **25%–28%**. Pilot bilateral local-currency settlement initiatives may provide new pathways for trade facilitation.

- ⚠ FX risk: Official vs. parallel market rate spread widens to 18%–22%
- ⚠ Logistics risk: Caspian Sea shipping efficiency drops approximately 30% during winter (November–March)

- 🔲 Market opportunity: Chinese products priced approximately **8%–12%** lower than Turkish products, offering clear value advantage
- 🔲 Policy window: 2025 meeting of the China-Turkmenistan Joint Committee on Economic and Trade Cooperation promoted tariff concession pilot programs

Source: World Bank Turkmenistan Country Report (Q1 2025); Economic and Commercial Office of the Chinese Embassy in Turkmenistan (May 2025); Caspian Sea Shipping Association Annual Report

🔲 Data Sources Summary

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