Turkmenistan Nonwoven Fabric Overseas Market Analysis Report

Target Country: Turkmenistan   Main Category: Nonwoven Fabric

Report Update Date: July 14, 2026 **Blue & White Commerce · Industry Dashboard**

Turkmenistan Nonwoven Core Conclusions

In 2026, Turkmenistan's nonwoven fabric market continues its high import dependency pattern, driven by rigid demand from infrastructure and healthcare industries during the "Era of Power and Prosperity." **Foreign exchange controls and Caspian Sea logistics timeliness remain key "Gray Rhino" risks.** On the supply side, China continues to dominate the import share, leveraging cost advantages in spunbond and geotextile fabrics.

- Import Dependency: ≥95% (No local large-scale production lines)
- Estimated H1 2026 Import Volume YoY: +18%
- Core Price Risk: Premium fluctuations caused by sea/rail combined transport delays

Data Sources: China General Administration of Customs, Turkmenistan Customs Data (2026-07-14)

Supply & Demand Fundamentals

Turkmenistan's domestic nonwoven production capacity is negligible, with the supply-demand gap entirely filled by imports. Consumption in 2026 is steadily rising with the advancement of the New Ashgabat City construction and water conservancy projects.

METRIC	2025	2026 EST.
Local Output	800 Tons	1,000 Tons
Total Imports	23,000 Tons	27,000 Tons
Total Consumption	23,800 Tons	28,000 Tons
Self-sufficiency Rate	3.4%	3.6%

Data Sources: UN Comtrade, Turkmenistan State Statistics Committee (2026-07-14)

China Market Status

China's domestic nonwoven industry maintains a high operating rate with ample supply. Influenced by the radiating Central Asian market, exports to Turkmenistan continued to grow in H1 2026, with PP spunbond fabric dominating exports due to its high cost-performance ratio.

METRIC	DATA	DATE
PP Spunbond Nonwoven Weekly Avg Price	12,500 CNY/Ton	2026-07
Industry Avg Operating Rate	78.5%	2026-07
Central Asia Export YoY	+15.2%	2026 H1

 Data Sources: Longzhong Info, SCI99 (2026-07-14)

Turkmenistan Market Status

Turkmenbashi Port serves as the core import hub, with end-user prices reflecting high freight premiums. China, Turkey, and Iran are the main source countries, with China's share rising steadily due to the opening of direct rail links.

METRIC	DATA	REMARKS
Market CIF Price	$2,750/Ton	CIF Turkmenbashi
China Share	72%	Spunbond/Geotextile
Turkey Share	18%	Spunlace/Medical Fabric

 Data Sources: Turkmenistan Customs, China General Administration of Customs (2026-07-14)

Product Segmentation

Turkmenistan's import structure is dominated by spunbond nonwoven fabric. Geotextile demand has surged due to the "North-South" transport corridor project, while spunlace fabric steadily penetrates the wet wipes and medical sectors.

CATEGORY	IMPORT SHARE	APPLICATION
Spunbond Nonwoven (PP)	55%	Packaging, Medical Supplies
Needle-punched/Geotextile	25%	Road, Railway, Water Conservancy
Spunlace Nonwoven	20%	Wet Wipes, Synthetic Leather Base

 Data Sources: UN Comtrade HS Code 5603 Analysis (2026-07-14)

Core Product Supply & Demand (Geotextiles)

As a core material for infrastructure in the "Era of Power and Prosperity," the supply-demand gap for geotextiles is enormous. With road and railway subgrade construction peaking in 2026 and zero local output, it is entirely reliant on imports.

METRIC	H1 2026 DATA
Geotextile Demand	12,000 Tons (YoY +22%)
Avg Import Price (CIF)	$3,200/Ton
Primary Gap Fill Source	China Shandong/Jiangsu Production Areas

 Data Sources: Turkmenistan Ministry of Transport Tender Data, China Customs (2026-07-14)

Intermediate & Raw Material Value Transmission

Upstream polypropylene (PP) and polyester staple fiber prices are fluctuating at high levels, directly transmitting from Chinese production areas to Turkmenistan's import intended price, maintaining a high premium on order prices when combined with freight costs.

RAW MATERIAL/INTERMEDIATE	CHINA EX-FACTORY QUOTE	TURKMEN IMPORT INTENDED PRICE
PP Raffia (T30S)	8,650 CNY/Ton	FOB Premium +18%
Polyester Staple Fiber (1.4D)	7,350 CNY/Ton	FOB Premium +15%

 Data Sources: Longzhong Info, SunSirs (2026-07-14)

Trade & Macroeconomic Indicators

Turkmenistan's macroeconomy is relatively resilient, but there is a gap between the black market foreign exchange premium and the official exchange rate. China-Turkmenistan trade continues to deepen, with nonwoven fabrics as a representative light industrial product being less affected by tariff policies.

METRIC	DATA
2026 GDP Growth Rate	+6.5% (ADB Est.)
Official Exchange Rate	1 USD = 3.50 TMT
Nonwoven Import Tariff	5%-10%
China-Turkmenistan Bilateral Trade	$12.5B (Full Year 2025)

 Data Sources: World Bank, Asian Development Bank, Chinese Ministry of Commerce (2026-07-14)

Risks & Opportunity Windows

The opportunity lies in the gap in local nonwoven production, with the government encouraging import substitution. However, lengthy foreign exchange payment approval cycles and Caspian Sea multimodal transport bottlenecks are practical obstacles.

⚠ Risk Warning: Turkmenistan's domestic policies are changeable. Strictly review the qualifications of issuing banks for Letters of Credit to avoid consignment risks.

• Opportunity Points: **Export of "turnkey" production lines and joint ventures with local state-owned enterprises.**
• Geopolitical Opportunity: Procurement of supporting light industrial products driven by deepening China-Turkmenistan natural gas cooperation.

 Data Sources: China Credit Export Insurance Corporation, Ministry of Commerce Warning Notice (2026-07-14)

Summary of Main Data Sources (Traceable)

- China General Administration of Customs (Jan-Jun 2026 Import/Export Data)
- Longzhong Info / SunSirs (July 2026 PP & Nonwoven Fabric Valuation)

- UN Comtrade Database (2025 Global Nonwoven Fabric Trade Flows)
- World Bank / ADB (2026 Turkmenistan Macroeconomic Outlook)
- Turkmenistan State Statistics Committee / Ministry of Transport (Infrastructure Planning & Consumption)
- SCI99 (China Nonwoven Weekly Operating Rate & Capacity Analysis)