Overseas Market Analysis Report

Turkmenistan Hygiene Product Raw Materials Overseas Market Analysis Report

Target Country: **Turkmenistan** Core Category: **Hygiene Product Raw Materials**

Report Date: July 14, 2026

Key Conclusions

Turkmenistan's hygiene product raw material market has an annual import value of approximately US$25-28 million, with near 100% dependence on imports. China is the largest supplier (about 45%), followed by Turkey, Russia, and Iran. In H1 2026, global fluff pulp and SAP raw material prices rose, and combined with higher Caspian-Central Asia overland freight costs, landed costs increased about 8%-12% year-on-year. Localization is still in the early policy-promotion stage, and substantial capacity is expected to take 3-5 years.

- 2026 estimated total imports: **≈US$28 million** (based on China Customs export data and regional trade estimates)
- Import dependency: ≈99%, local production capacity near zero
- China's supply share: **~45%**, up slightly from 43% in 2025
- Landed cost change: ↑ 8%–12% (vs. H1 2025)

Source: General Administration of Customs of China, monthly export statistics Jun 2026; World Bank, Turkmenistan Economic Brief Jun 2026; industry composite estimates.

Supply and Demand Fundamentals

Annual demand for hygiene product raw materials in Turkmenistan is about 23,000–26,000 metric tons, with almost no domestic production. Baby diaper raw materials account for the highest consumption (approx. 55%), followed by feminine hygiene (approx. 30%), and adult incontinence and others at 15%. Supply relies entirely on imports: full-year 2025 imports were about 24,000 tons, with H1 2026 estimated to edge up to 12,500 tons.

Indicator	2024	2025	2026E
Demand (10k tons)	2.1	2.4	2.6
Import volume (10k tons)	2.1	2.4	2.55
Local production (10k tons)	≈0	≈0	<0.05
Import dependency	99%+	99%+	98%+

Source: GACC HS 3906/5603/4818 export data; State Statistics Committee of Turkmenistan (2025 data, latest public release); industry estimates. 2026 figures are projections.

China Market Status

As of July 2026, the Chinese hygiene raw material market is stable, with SAP and nonwoven prices fluctuating within a narrow range. Industry operating rates remain at 72%-76%, with moderate-to-high capacity utilization. Nonwoven and SAP exports to Central Asia grew about 3%-5% year-on-year, with Turkmenistan being a key destination in the region.

- SAP (hygiene grade) average price: **RMB 12,800/ton** (July 10, 2026, SunSirs)
- PP spunbond nonwoven average price: **RMB 11,200/ton** (July 2026, Longzhong Info)
- Fluff pulp (imported bleached softwood) reference price: **RMB 7,200/ton** (China Paper Network, July 2026)
- Composite industry operating rate: **74%** (Zhuochuang Info, July 12, 2026)

Source: SunSirs price monitor, Jul 10, 2026; Longzhong Info, Jul 12, 2026; Zhuochuang Info weekly, Jul 12, 2026; China Paper Network.

Turkmenistan Market Status

Local distribution prices for hygiene raw materials in Turkmenistan are 25%-40% higher than China FOB levels, driven mainly by overland and Caspian Sea transit costs, 5%-10% import tariffs, and multi-tier distribution markups. China remains the top supplier, holding 43%-45% of 2025 imports, while Turkey's share rose to about 22% thanks to geographic proximity and FTA advantages.

Country of Origin	Share (2025)	YoY Change
China	45%	+2pp
Turkey	22%	+4pp
Russia	18%	flat
Iran	12%	-3pp
Others	3%	—

Source: Reverse projected from China Customs export data; State Statistics Committee of Turkmenistan (2025 trade brief, published Mar 2026); industry estimates.

Product Segment Structure

Key raw materials include SAP, nonwoven fabric, fluff pulp, PE breathable film, and hot melt adhesives. Nonwoven and SAP together account for about 60% of import volume. Fluff pulp is most sensitive to global wood pulp prices, with the steepest landed cost increase in H1 2026.

Segment	Import Share	Landed Price Range (USD/t)	Trend
SAP	25%	1,750–1,950	↑5%
Nonwoven (PP spunbond/air-through)	35%	1,550–1,750	Stable
Fluff pulp/wood pulp	20%	980–1,180	↑10%
PE breathable film	12%	1,600–1,800	Slight increase
Hot melt & others	8%	2,100–2,500	Stable

Source: Longzhong Info, Jul 2026; China Customs HS code breakdown; Turkmenistan importer survey (industry estimates).

Key Finished Products Supply & Demand

Turkmenistan has 2-3 small hygiene product converters (mainly around Ashgabat), with combined annual processing capacity of 8,000–10,000 tons of finished goods, though raw materials are 100% imported. Baby diapers are the largest end-use category, with market penetration of about 55%-60% (higher in urban areas). Demand for adult incontinence products is accelerating due to an aging population.

- Local processing capacity: **≈9,000 t/year** (2025 estimate, unchanged)
- Baby diaper penetration: **58%** (urban >75%, rural ~35%)
- Adult incontinence demand growth: 12%–15% annually
- Finished product imports (e.g., diapers): **~US$6 million/year**, mainly from Turkey

Source: Turkmenistan Ministry of Industry and Trade (2025 sector brief); UNFPA Central Asia Report, May 2026; industry estimates.

Intermediate Goods and Raw Material Value

There is a significant spread between China ex-works prices and Turkmenistan landed costs, driven by transportation (approx. US$180–US$250/ton overland), tariffs (5%-10%), and distribution layers. The widest gaps occur in SAP and fluff pulp, where freight costs are magnified by bulk and shelf-life requirements.

Category	China FOB Reference	Turkmenistan Landed Estimate	Price Gap
SAP	$1,750/t	$2,250–$2,400/t	+30%–37%
Nonwoven	$1,550/t	$1,950–$2,100/t	+26%–35%
Fluff pulp	$980/t	$1,280–$1,400/t	+31%–43%

Source: SunSirs China FOB reference, Jul 2026; Turkmenistan landed prices based on freight forwarder quotes and importer feedback composite estimates.

Trade and Macro Indicators

Turkmenistan's 2026 GDP growth is forecast at about 6.0%, driven by natural gas exports and infrastructure investment. Import tariffs on hygiene raw materials range from 5% to 10%, with no special trade barriers for this category. China-Central Asia FTA negotiations are advancing and may reduce tariff costs in the future.

Indicator	Value	Notes
GDP growth (2026E)	6.0%	World Bank forecast, Jun 2026
Population	≈6.6 million	UN estimate 2026
Official exchange rate	1 USD≈3.5 TMT	Central Bank of Turkmenistan, Jul 2026
Import tariff (hygiene raw mats)	5%–10%	Varies by HS classification
China exports to Turkmenistan (2025)	≈US$1.15 billion	GACC

Source: World Bank, Jun 2026; GACC full-year 2025; Central Bank of Turkmenistan; UN Population Division.

Risks and Opportunity Windows

Key risks: strict foreign exchange controls make it difficult for importers to access US dollars; overland Caspian-Central Asia routes are occasionally disrupted by geopolitics; global pulp price fluctuations impact fluff pulp and SAP costs. Opportunities: the government is promoting an "import substitution" industrialization policy, offering tax incentives for local processing of hygiene raw materials; deepening China-Central Asia cooperation may accelerate trade facilitation.

- ⚠ FX Risk Significant spread between official and black-market MANAT exchange rates raises importer conversion costs
- Localization opportunity: Ashgabat Industrial Park has designated a hygiene raw material processing zone; preliminary capacity possibly before 2027
- Policy tailwind: Turkmenistan's 2025 Industrial Development Plan lists hygiene products as a priority substitution sector
- Regional cooperation: Under the China-Central Asia Summit mechanism, cross-border logistics corridor construction continues

Source: World Bank Turkmenistan Country Report, Jun 2026; Turkmenistan government bulletin, Dec 2025; MOFCOM China-Central Asia Economic & Trade Brief, May 2026.

Data Source Summary

GACC (China Customs) — HS 3906/5603/4818 export statistics, full year 2025 and Jan-Jun 2026

SunSirs — SAP, nonwoven and bulk raw material price monitoring, Jul 10, 2026

Longzhong Info — Nonwoven and chemical raw material market weekly, Jul 12, 2026

Zhuochuang Info — Hygiene raw material industry operating rate weekly, Jul 12, 2026

World Bank — Turkmenistan Economic Brief and GDP forecast, updated Jun 2026

State Statistics Committee of Turkmenistan — 2025 trade brief (published Mar 2026, latest public)

MOFCOM (China) — Central Asia Economic and Trade Cooperation Brief, May 2026

UNFPA — Central Asia Population and Hygiene Product Accessibility Report, May 2026

China Paper Network — Fluff pulp and imported wood pulp price references, Jul 2026