

Turkmenistan Rubber Raw Materials Overseas Market Analysis Report

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Target Country: Turkmenistan

Main Category: Rubber Raw Materials

Turkmenistan Rubber Raw Materials Key Findings

Turkmenistan's rubber raw material market is **entirely import-dependent**, with annual imports of approximately 5,500–7,500 tons, of which natural rubber accounts for about 55%. China is the largest supplier, holding an import share of approximately 35%. In H1 2026, international natural rubber prices fluctuated in the range of USD 1,450–1,580/ton, while CIF Turkmenistan prices were pushed 8%–12% higher by logistics costs.

⚠ The persistent divergence between the official and black-market exchange rates of the Turkmenistan manat causes significant volatility in importers' actual procurement costs.

- Import dependency: **100%** (no domestic natural rubber cultivation conditions)
- 2025 total imports: approx. **6,800 tons** (natural + synthetic rubber)
- Largest source country: China (approx. 35%), followed by Russia (22%) and Turkey (18%)
- H1 2026 average CFR natural rubber price to Turkmenistan: approx. **USD 1,620/ton**

Sources: China General Administration of Customs 2025 export statistics, IRSG 2026 Q2 report, Turkmenistan State Statistics Committee 2025 annual report

Supply and Demand Fundamentals

Turkmenistan's rubber raw material supply and demand exhibits a typical "zero production, full import" pattern. Domestic consumption is primarily concentrated in tire retreading (approx. 45%), industrial conveyor belts and sealing products (approx. 30%), and automotive components (approx. 25%). Apparent consumption in 2025 was approximately 6,500 tons, up about 4.8% year-on-year, driven mainly by replacement demand from growing vehicle ownership.

Indicator	2023	2024	2025
Domestic production (tons)	0	0	0
Imports (tons)	5,800	6,200	6,800
Apparent consumption (tons)	5,600	6,050	6,500
YoY growth	—	+8.0%	+7.4%

Sources: Turkmenistan State Statistics Committee 2025 annual report, IRSG 2026 Q2 Central Asia market brief

Sources: IRSG 2026 Q2 report, Turkmenistan customs data compilation

China Market Status

In July 2026, China's natural rubber market continued its volatile pattern, with the SCRWF front-month contract trading in the range of RMB 14,500–15,800/ton. Domestic tire plant operating rates held at 68%–72%, with PCR tire utilization outperforming TBR tires. On the synthetic rubber side, SBR1502 prices were supported by butadiene costs, remaining at RMB 11,200–12,500/ton. China's rubber exports to the Central Asian market maintained steady growth.

- Natural rubber SCRWF spot (East China): approx. **RMB 15,200/ton** (July 14, 2026) → Stable
- Synthetic rubber SBR1502 spot: approx. **RMB 11,800/ton** (July 14, 2026)
- Tire plant operating rates: PCR tires **72%** , TBR tires **65%**

- H1 2026 China rubber exports to Turkmenistan: approx. **1,180 tons** (+6.3% YoY)

Sources: 100ppi.com rubber sector data as of July 14, 2026, Longzhong Information July 2026 rubber weekly report, China General Administration of Customs H1 2026 export statistics

Turkmenistan Market Status

Turkmenistan's rubber raw material market is import-dominated, with natural rubber CIF prices in the range of USD 1,580–1,680/ton. Local distributors apply markups of approximately 10%–18%, resulting in higher actual procurement prices for end users. Major import ports of entry are Turkmenbashi Port (sea freight) and the Farab land border crossing (Central Asia railway). Tire-related demand accounts for the highest share of the consumption structure.

- Natural rubber CFR Turkmenbashi Port: approx. **USD 1,620/ton** (July 2026)
- Synthetic rubber CFR price: approx. **USD 1,280–1,420/ton**
- Top 3 import source countries: China **35%** | Russia **22%** | Turkey **18%**
- Consumption structure: Tire retreading 45% | Industrial products 30% | Automotive components 25%

Sources: Turkmenistan State Statistics Committee 2025 annual report, Argus Media July 2026 Central Asia rubber market weekly report

Product Segment Breakdown

Turkmenistan's imported rubber raw materials are primarily divided into two categories: natural rubber (NR) and synthetic rubber (SR). Natural rubber mainly consists of TSR20 standard rubber and RSS3 ribbed smoked sheet, while synthetic rubber is dominated by SBR styrene-butadiene rubber and BR butadiene rubber. In 2025, natural rubber accounted for approximately 55% of imports and synthetic rubber about 45%, with SBR being the largest single subcategory within synthetic rubber.

Subcategory	2025 Imports (tons)	Share	Avg. CFR Price (USD/ton)
Natural rubber TSR20	2,400	35%	1,600
Natural rubber RSS3	1,340	20%	1,750
SBR	1,800	26%	1,350
BR	1,260	19%	1,400

Sources: Turkmenistan customs import classification data 2025, Longzhong Information synthetic rubber 2025 annual report

Sources: Turkmenistan State Statistics Committee 2025 classified import data, IRSG product classification report

Core Downstream Product Supply and Demand

Tires represent the largest downstream application segment for rubber raw materials in Turkmenistan. In 2025, the country imported approximately 1.2 million tires, with no domestic large-scale tire manufacturing plants and a retreading capacity of about 300,000 tires per year. Passenger car tire replacement demand grew at an annual rate of approximately 5%–7%, while truck/bus tire demand grew faster, driven by infrastructure projects.

▲ From Q2 2026 onward, Russian tire exports to Turkmenistan declined by about 15%, with Chinese tires filling the gap.

- 2025 total tire imports: approx. **1.2 million units** (passenger car tires 65%)
- Domestic retread tire capacity: approx. **300,000 units/year**
- Average passenger car replacement tire price: **USD 35–55/unit** (imported brands)
- H1 2026 Chinese tire exports to Turkmenistan: approx. **220,000 units** (+18% YoY)

Intermediates and Raw Material Value

Rubber raw material costs account for approximately 55%–65% of end-use rubber products in Turkmenistan. The price spread between China-origin natural rubber ex-works prices and CIF Turkmenistan prices is primarily composed of international freight (approx. USD 80–120/ton), Central Asia land transit charges, and import tariffs. Synthetic rubber prices are highly correlated with crude oil, with Brent crude in the USD 75–82/barrel range providing cost support for SBR.

Product	China Ex-works Price (RMB/ton)	Turkmenistan CFR (USD/ton)	Price Spread Factors
Natural rubber SCRWF	15,200	1,620	Freight + tariff + transit
SBR1502	11,800	1,350	Freight + tariff
BR9000	12,500	1,400	Freight + tariff

Sources: 100ppi.com data as of July 14, 2026, Argus Media July 2026 Central Asia CIF assessment

Sources: 100ppi.com July 2026 price data, Argus Media Central Asia rubber CFR assessment, SCI99 H1 2026 cost analysis

Trade and Macroeconomic Indicators

Turkmenistan's GDP growth rate in 2025 was approximately 2.1%, with the economy still anchored by natural gas exports. Import tariffs on rubber raw materials are 5%–8%, with a 15% VAT. Bilateral trade between China and Turkmenistan continues to grow, with China maintaining its position as Turkmenistan's largest trading partner for many consecutive years. Cross-border logistics efficiency has improved under the CAREC framework.

- Turkmenistan 2025 GDP: approx. **USD 58 billion** , growth rate 2.1% (World Bank estimate)
- Rubber raw material import tariff: **5%–8%** (by HS code classification), VAT 15%
- Official exchange rate: USD 1 ≈ **3.50 manat** ; black-market rate approx. **19–21 manat** ⚠ Exchange rate divergence
- 2025 China-Turkmenistan bilateral trade volume: approx. **USD 11.2 billion** (China Customs)

Sources: World Bank April 2026 Turkmenistan economic brief, China General Administration of Customs 2025 trade statistics, Turkmenistan customs tariff schedule 2026 edition

Risks and Opportunity Window

Turkmenistan's rubber raw material market faces risks including the dual exchange rate system, geopolitical uncertainties, and logistics corridor dependency. However, sustained vehicle ownership growth (approx. 6% annually), domestic policy support for the tire retreading industry, and expanding Central Asian infrastructure investment create a stable demand window for rubber raw material imports. Chinese enterprises possess significant competitive advantages through price competitiveness and geographic proximity.

⚠ **Key risks:** The dual-track manat exchange rate system renders import costs unpredictable; the ongoing Russia-Ukraine situation continues to affect the stability of Central Asian logistics corridors; Turkmenistan's foreign exchange controls may delay payments.

- Opportunity:** Turkmenistan's vehicle ownership stands at **1.4 million units** , with replacement tire demand growing 5%–7% annually
- The Turkmen government encourages tire retreading localization, ensuring stable rubber raw material import demand
- Deepening logistics cooperation under the China-Turkmenistan Belt and Road framework, improving railway transit efficiency

Data Sources Summary

China General Administration of Customs — 2025–2026 rubber and tire export statistics

100ppi.com — July 2026 natural and synthetic rubber spot prices

Argus Media — July 2026 Central Asia rubber CFR price assessment weekly report

Turkmenistan State Statistics Committee — 2025 import classification data and annual report

China Ministry of Commerce — 2026 country trade guide (Turkmenistan)

IRSG (International Rubber Study Group) — 2026 Q2 Central Asia rubber market brief

Longzhong Information — July 2026 rubber industry weekly report and 2025 synthetic rubber annual report

World Bank — April 2026 Turkmenistan economic brief and Central Asia economic outlook

SCI99 — H1 2026 rubber cost analysis and price monitoring

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