ADB – Turkmenistan WTO accession support – Private-sector training

Ashgabat • October 2026

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SESSION 3

What this session should help you do

1
Read market-access information correctly

2
Distinguish WTO access from commercial opportunity

3
Compare export markets using tariffs, rules, and firm capability

4
Justify a preliminary market choice

Core question: "*Which export opportunity is worth investigating further — and why?*"

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Market access is more than a tariff number



Potential commercial opportunity

An export opportunity is not created by one indicator alone. It emerges when several conditions align.

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Where to find information on market access conditions

Each WTO Member has a Schedule of Tariff Concessions, which can be accessed via the *WTO Documents Online* database (https://docs.wto.org/).

The following is an example of the EU's Schedule of Tariff Concessions for liquorice extract:

Tariff item number	Description of products	Bound rate of duty	Special safeguard	Initial negotiating right	Other terms and conditions
1	2	3	4	5	6
1302	Vegetable saps and extracts; pectic substances, pectinates and pectates; agar-agar and other mucilages and thickeners, whether or not modified, derived from vegetable products				
1302 11 00	- Vegetable saps and extracts	Free			
1302 12 00	-- Opium	3,2			
	-- Of liquorice				

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Where to find information on market access conditions

The *International Trade Centre*'s *Market Access Map* database (https://www.intracen.org/resources/tools/market-access-map) further provides information on the applicable applied MFN rates and applicable regulatory requirements.

The following provides an example of the information available in the database for liquorice extract from Turkmenistan to France:

Tariff regime ⓘ	Applied Tariff ⓘ	AVE ⓘ	Note
MFN duties (Applied)	3.20%	3.20%	

190. Turkmenistan

Turkmenistan is listed as one of the countries eligible for this tariff regime in 2026

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Market access conditions

Trade remedies ⓘ

*France does not apply any trade remedy on the **selected product**.*

Regulatory requirements ⓘ

NTM YEAR ⓘ

2026

Import requirements applied to this product	Total measures 36
A130 - Systems approach ⓘ	1
A140 - Authorization requirement for SPS reasons for importing certain products ⓘ	1
A150 - Authorization requirement for importers for SPS reasons ⓘ	2
A210 - Tolerance limits for residues of or contamination by certain (non-microbiological) substances ⓘ	1
A220 - Restricted use of certain substances in foods and feeds and their contact materials ⓘ	1

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What WTO membership normally provides — and what it does not

Normally provides:

- MFN treatment from WTO Members;
- More predictable rules;
- Enforceable disciplines;
- Transparency and due process.

Does not automatically provide:

- Duty-free access;
- Guaranteed buyers;
- Exemption from standards; and
- Protection from strong competitors.

Key message: WTO accession improves the rules of the game, but firms still need a commercial strategy.

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How to implement an effective commercial strategy

To implement an effective commercial strategy and benefit from the opportunities created by WTO membership, businesses operating in Turkmenistan should first identify an appropriate product and export market.

With respect to the product, businesses operating in Turkmenistan could consider selecting one of the leading products identified below, based on their export potential:



Minerals and fuels, including petroleum gases, electrical energy, sulphur, bituminous mixtures, and paraffin wax



Chemicals and pharma, including urea, iodine, potassium chloride, nitrogenous fertilisers, and sulphuric acid



Textiles and apparels, including cotton yarn, cotton yarn waste, coarse animal hair, and woven cotton fabrics



Agriculture and livestock, including liquorice extracts, cotton linters, fresh or chilled tomatoes, beans, and natural gums, resins and oleoresins

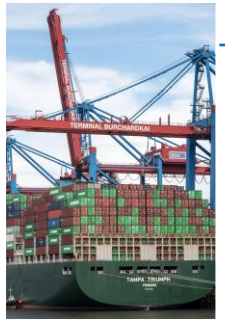
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How to implement an effective commercial strategy

With respect to the export market, businesses operating in Turkmenistan should assess whether the potential market is commercially viable and accessible by analyzing the relevant market access conditions.

The relevant market access conditions may be broadly classified into:



Tariff measures, including bound tariffs, MFN applied tariffs, and preferential tariffs



Non-tariff measures, including SPS and TBT measures, Customs procedures, import licensing and documentation, and trade remedies.

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MFN treatment: the normal WTO rule, with exceptions

For goods, if a WTO Member grants a covered Article I advantage… → **… it normally extends it to like products of all WTO Members**

MFN is subject to WTO-permitted exceptions, including preferences.
A competitor may still enter the market under an FTA at a lower preferential tariff.

MFN tariff

Preferential tariff

Competitive disadvantage?

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Bound tariffs and applied tariffs: read them separately

Bound tariff
Maximum rate committed in a WTO schedule

Applied tariff
Rate actually charged at the border today

Policy space
Gap between the two

Example:
Bound: 20%
Applied: 8%
The importer pays 8%, but the government cannot raise it above 20% without consequences.

For exporters, the applied tariff in the destination market is usually the immediate commercial cost.

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A low tariff does not always mean easy access

Low tariffs	Costly certification	Difficult logistics	Strong incumbents	Weak buyer links

Effective market access = Legal access + regulatory compliance + commercial feasibility.

The exercise will ask you to compare markets where each option has strengths and weaknesses.

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Preferential rules of origin: why competitors' preferences matter

Turkmen exporter MFN tariff: 8%	Competitor from FTA partner Preferential tariff: 0%	Difference 8 percentage points

Preferential rules of origin determine whether a competitor can actually claim a preferential tariff. To identify preferential tariffs granted by one WTO Member to another WTO Member, businesses operating in Turkmenistan may consult the WTO Tariff & Trade Data platform (https://ttd.wto.org/en).

For instance, the EU grants duty-free access for liquorice extract originating in Türkiye under the *EU-Türkiye Free Trade Agreement*:

EU - Türkiye free trade agreement	Türkiye	0.0%

When comparing markets, ask: "*Who receives a preference there, and do they really qualify for it?*"

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SPS and TBT: regulatory compliance as a market-entry cost

SPS
Food safety, animal health, plant health

TBT
Technical regulations, standards, conformity assessment

Buyer requirements
Private specifications may go beyond law

WTO rules discipline how measures are designed and applied. They do not remove legitimate health, safety or technical requirements.

For an SME, the practical question is often:
"Can I meet the requirement at a cost that still leaves a margin?"

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Customs, licensing and documentation: procedures and transaction costs

Customs procedures	Import licensing	Documentation	Payments / logistics
Release time Valuation Classification	Criteria Deadlines Transparency	Certificates Forms Consistency	Cost Risk Delay

A product can face a low tariff, but still be commercially unattractive if procedures are slow, uncertain or expensive.

Trade facilitation helps turn formal market access into practical access.

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Trade remedies: market access can change after entry

Anti-dumping	Countervailing duties	Safeguards	Monitoring risk

Even after entry, anti-dumping, countervailing, or safeguard measures may apply only where the relevant WTO tests and procedures are met.

For the exercise: A market with frequent trade-remedy cases may deserve caution even if the current tariff looks attractive.

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A practical market screening sequence

1	2	3	4	5	6
Product capability	Import demand	Tariffs / preferences	Regulatory entry	Competitors	Firm readiness

Only then: Decide whether to enter, investigate further, or not prioritize.

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Comparing three markets: avoiding the tariff trap

Criterion	Market A	Market B	Market C	What to ask
Demand	Large / growing?	Medium?	Small / niche?	Is demand commercially meaningful?
MFN benchmark	Low?	Medium?	High?	Is this only the default rate?
Turkmen treatment	Confirmed?	Confirmed?	Confirmed?	What rate does Turkmen origin actually face?
Competitor preferences	FTA / CIS / other?	None?	Rules of origin?	Is a competitor preferred?
Regulation	Difficult?	Moderate?	Manageable?	Can firms comply at a viable cost?
Logistics / competition	Distant / incumbents?	Regional?	Nearby?	What is delivered cost and buyer access?

Recommendation should explain trade-offs, not just identify the lowest tariff or largest market.

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What the product opportunity card will show

Product	HS code, description, current exports
Capability signal	Why the product was selected by the study
Candidate markets	Demand, growth and supplier structure
Market access	MFN tariffs, preferences, SPS/TBT, procedures
Commercial test	Main constraints and information still missing

The card is a starting point for business judgment — not a full feasibility study.

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Exercise 3: choosing an export market

Groups 1-2
Fresh tomatoes: SPS, preferences, perishability, and regional logistics.

Groups 3-4
Cotton yarn: Market size, incumbent position, buyer requirements and preferences.

Groups 5-6
Potassium chloride: Tariff, freight, registration, and delivery cost.

Recommendation options
The recommendation may be to enter Market A, B or C, investigate the market further before making a decision, or not prioritize the market at this stage.

Report-back
For each potential market, each group of participants shall identify two reasons supporting the assessment, one key risk, one piece of missing evidence that should be obtained, and one recommended business action.

The same product may lead groups to different recommendations.
That is useful if assumptions and evidence are clear.

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Why these three products?

Fresh tomatoes
≈USD 45.8m annual exports

Learning point: SPS, perishability, preferences and regional logistics.

Cotton yarn
≈USD 85.4m annual exports

Learning point: largest market vs incumbent position, preferences and buyer requirements.

Potassium chloride
≈USD 169m annual exports

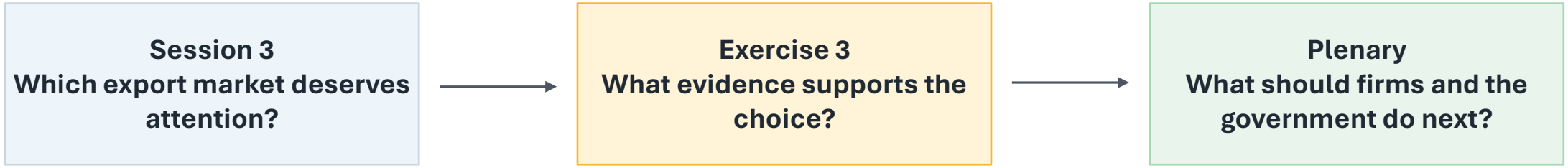
Learning point: tariff versus freight, registration and delivered cost.

Common logic

Each case compares three markets with trade-offs.
The task is to recommend entry, further investigation, deprioritization — or "*none yet*".

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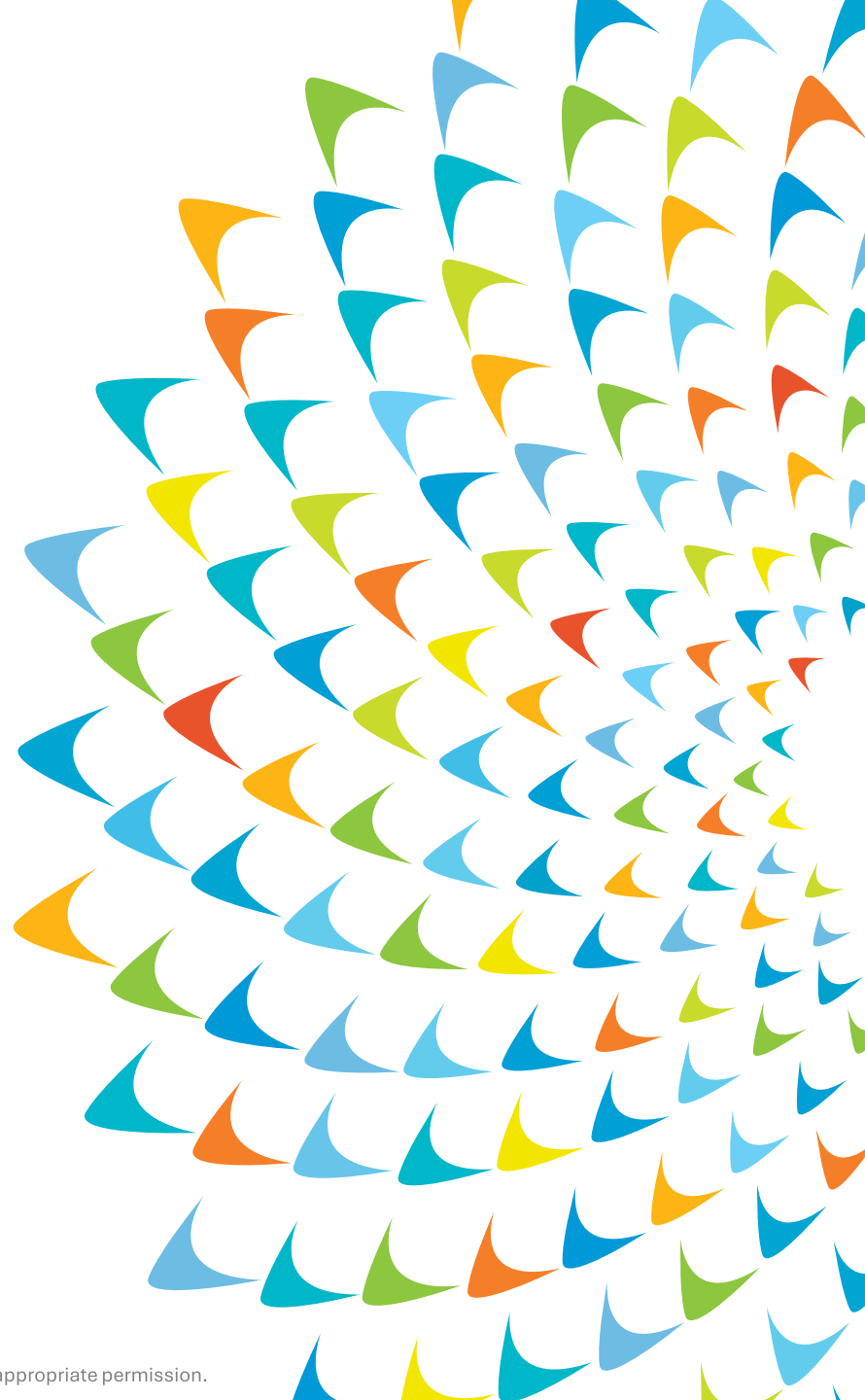
Bridge to the afternoon plenary: From market place to action



Next step: Turn opportunity screening into firm action and evidence-based private-sector input to accession.

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