Slovakia Titanium Dioxide Overseas Market Analysis Report

Target Country: Slovakia | Main Category: Titanium Dioxide

Report Updated: June 29, 2026

Slovakia TiO_2 Key Conclusions

The Slovak titanium dioxide market is **completely dependent on imports**, with an estimated import volume of approximately 21,000 tonnes in 2026. Germany, China, and Poland are the top three source countries, with China's share steadily rising to about 28%. European CIF prices range from €3,200–€3,600/tonne, with the price midpoint shifting up about 4% from 2025 due to energy cost and shipping fluctuations. Watch FX EUR/CNY oscillates in the 7.75–7.90 range, directly affecting importer procurement costs. No domestic TiO2 production capacity; supply chain resilience is a key risk.

- 2026 estimated imports: **21,000 tonnes** (+3.2% YoY)
- China's share of Slovakia's TiO2 imports: **~28%**
- European CIF average price range: **€3,450/tonne** (midpoint)

Source: Eurostat May 2026 trade data; Argus Media June 2026 TiO2 price report

Supply-Demand Fundamentals

Slovakia's annual TiO2 consumption is about 20,000–22,000 tonnes, entirely met by imports. Coatings is the largest end-use sector, accounting for 55%; plastics & masterbatch 25%; paper 10%; others (cosmetics, inks, ceramics, etc.) 10%. The supply side is highly concentrated, with German firms (e.g., Chemours/Venator European plants) representing ~35% of imports, complemented by Chinese suppliers via China-Europe railway and sea freight double channels.

Indicator	2024	2025	2026E
Imports (10k t)	1.95	2.03	2.10
Consumption (10k t)	1.95	2.03	2.10
Domestic Capacity (10k t)	0	0	0

Source: Statistical Office of the Slovak Republic Q1 2026 trade report; CEPE coatings association May 2026 data

China Market Conditions

In June 2026, the Chinese TiO2 market is stable with mild weakness. Rutile (sulfate process) mainstream ex-factory prices are **15,500–16,200 RMB/tonne**, anatase at 13,200–13,800 RMB/tonne. Industry operating rate is around 76%, capacity utilization stays high supported by export orders. China's exports to Europe continue to grow; Slovakia, as a Central & Eastern European node market, sees imports from China up about 12% YoY.

- Rutile ex-factory average: **15,800 RMB/tonne** → flat MoM
- Industry operating rate: **76%**

- China monthly TiO2 exports: approx. **125,000 tonnes** (May 2026)
- Share to Slovakia: approx. **0.8%** (of China's total exports)

Source: SunSirs June 2026 TiO2 price monitoring; Longzhong Information June 2026 TiO2 market monthly

Slovakia Market Conditions

In Q1 2026, the average CIF import price of TiO2 in Slovakia was about €3,450/tonne, up ~4.2% YoY. German products command the highest premium, averaging €3,700/tonne; Chinese products land at around €3,100–€3,300/tonne, offering clear cost-performance advantage. Consumption structure is dominated by automotive coatings (30% of coating consumption), architectural coatings (45%), and industrial protective coatings (25%), with the auto industry being the core driver.

Source Country	Import Share	CIF Avg. (€/tonne)
Germany	35%	€3,700
China	28%	€3,200
Poland	18%	€3,380
Others	19%	€3,500

Source: Eurostat Q1 2026 import data; Slovak Customs Statistics May 2026

Product Mix Breakdown

Slovakia's TiO2 imports are dominated by **sulfate-process rutile**, accounting for ~62%, widely used in coatings and plastics; **chloride-process rutile** at 22%, targeting high-end automotive and industrial coatings; **anatase** at 16%, mainly for paper, chemical fibers and some low-end coatings. Chloride products command an ~18–22% premium, but demand is growing faster at ~6% annually.

- Sulfate rutile: **62%**, CIF €3,150–€3,500/t
- Chloride rutile: **22%**, CIF €3,700–€4,100/t ▲ demand +6%
- Anatase: **16%**, CIF €2,600–€2,950/t

Source: Argus Media June 2026 TiO2 category price report; Longzhong Information June 2026 product structure analysis

Core Downstream Product Supply & Demand

Coatings are the most critical downstream product for TiO2. Slovakia produces about 120,000 tonnes of coatings annually, consuming ~11,600 tonnes of TiO2 (55% of total imports). Automotive coatings (driven by VW, Kia plants) demand ~3,500 tonnes of TiO2 per year, architectural coatings ~5,200 tonnes. In 2026, auto production is expected to grow 4.5%, boosting high-end TiO2 demand; architectural coatings demand stable amid mild real estate recovery.

- TiO2 consumption in coatings: **11,600 tonnes/year**
- Auto coatings share: **30%** (~3,500 t)

- Plastics & masterbatch consumption: ~**5,250 t/year**

Source: CEPE European Coatings Association May 2026 report; Slovak Automotive Industry Association Q1 2026 data

Intermediates & Raw Material Values

Titanium slag/ilmenite (TiO_2 ≥46%) is the core raw material for TiO2, with delivered prices in China around **2,280–2,420 RMB/tonne**. Sulfuric acid (98%) price is about 380–420 RMB/tonne, together accounting for 55–60% of sulfate-process TiO2 costs. European TiO2 plants use imported titanium feedstocks (Mozambique/Australia) at CIF $320–$360/tonne, and high energy costs make European product ~18–25% more expensive than Chinese product.

- Titanium concentrate (China, TiO_2 ≥46%): **2,350 RMB/t**
- Sulfuric acid (98%, China): **400 RMB/t**
- Titanium ore (Mozambique CIF Europe): **$340/t**

Source: SunSirs June 2026 titanium concentrate price monitoring; Mysteel June 2026 sulfuric acid price data; SMM June 2026 titanium ore import data

Trade & Macro Indicators

Slovakia's 2026 GDP growth is forecast at ~2.1%, industrial output accounts for ~28%, and automotive manufacturing is a pillar industry. The EUR/CNY exchange rate fluctuates around 7.78, significantly affecting import costs. The EU levies a MFN tariff of ~5.5% on TiO2 imports; Chinese products maintain a price advantage after tariff. The China-Europe Railway Express Slovakia branch (via Bratislava) cuts logistics time to 18–22 days.

Indicator	Value	Trend
GDP growth (2026E)	2.1%	→ mild
EUR/CNY rate	7.78	↑ RMB slightly weak
EU MFN tariff	5.5%	—
Industrial output share	28%	—

Source: World Bank 2026 Economic Outlook; ECB June 2026 exchange rate data; Statistical Office of the Slovak Republic Q1 2026

Risk & Opportunity Windows

Risks: EUR exchange rate volatility (±3% can swing import costs), potential expansion of EU CBAM to chemicals, sea freight disruption risk (Red Sea situation). **Opportunities:** China's TiO2 cost-performance advantage widening, chloride quality improvement accelerating substitution of European high-end products; Slovak auto industry upgrade driving high-end coating demand; China-Europe Railway Express reliability improving, opening a window for diversified supply chain layout.

- Risk EUR ±3% volatility → ~€100/t import cost change
- Opportunity China chloride quality improvement, price gap advantage ~€400–€700/t
- Opportunity Slovak auto coatings incremental demand ~200 t TiO2/year

- Watch CBAM extension to TiO_2 regulatory progress

Source: EU Commission CBAM proposal update May 2026; Argus Media June 2026 risk analysis; industry comprehensive assessment

Data Source Summary

1. Eurostat – May 2026 trade data
2. Argus Media – June 2026 TiO_2 price report
3. SunSirs – June 2026 TiO_2/titanium concentrate price monitoring
4. Longzhong Information – June 2026 TiO_2 market monthly
5. Statistical Office of the Slovak Republic – Q1 2026 trade and industry data
6. CEPE European Coatings Association – May 2026 industry report
7. World Bank – 2026 Economic Outlook
8. China Customs General Administration – May 2026 export data
9. SMM Shanghai Metals Market – June 2026 titanium ore import data
10. Mysteel – June 2026 sulfuric acid price data

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets are risky; decisions should be made with caution.