Overseas Market Analysis | Slovakia | Resin

Slovakia Resin Overseas Market Analysis Report

Covering supply-demand fundamentals, Chinese & target market dynamics, intermediates/raw materials, trade/macro insights, risks and opportunities

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Slovakia Resin: Key Conclusions

Slovakia's resin market has an **import dependency exceeding 78%**, with minimal domestic modification capacity. Automotive manufacturing consumes 42%, serving as the largest end-user. European resin prices rose moderately in H1 2026, with EU CBAM pushing up import costs by 3%-5%. Chinese resin market share in Slovakia is growing steadily but faces non-tariff barriers.

Import Dependency **78%+** | Auto Consumption **42%** | CN Share **6.8%** ▲

Source: Eurostat 2025 Q4 trade data; Statistical Office of Slovakia 2025 industry report; Argus Media May 2026 European Resin Monthly

Supply & Demand Fundamentals

Slovakia's apparent resin consumption reached approx. **482,000 tons** in 2025, while domestic production was only 105,000 tons, with the gap filled by imports. Automotive, construction, and packaging are the three pillars, accounting for 78% of consumption.

Indicator	2024	2025	YoY
Apparent Consumption (10k tons)	46.8	48.2	+3.0% ▲
Domestic Output (10k tons)	10.2	10.5	+2.9% ▲
Net Imports (10k tons)	36.6	37.7	+3.0% ▲
Import Value (€B)	2.75	2.87	+4.4% ▲

Source: Statistical Office of Slovakia Dec 2025 Bulletin; Eurostat COMEXT database 2025 full year

China Market Status

As of June 2026, China's resin market operating rate is approx. **72%**. East China epoxy resin prices are **15,200-16,800 CNY/ton**, and PP raffia grades are **7,600-8,200 CNY/ton**. China's resin exports to the EU continue to grow, with Slovakia as a key Central European hub.

Category	Price Range (CNY/ton)	Operating Rate	MoM
Epoxy Resin E-44	15,200-16,800	68%	Flat ▬
PP T30S	7,600-8,200	78%	+1.2% ▲
Unsaturated Polyester Resin	8,800-9,500	65%	-0.8% ▼

Source: CCI 2026-06-25 resin quotes; Longzhong Info June 2026 Polyolefin Weekly. Some data is carried forward due to no latest public data.

Slovakia Market Status

Slovakia's resin market is import-dominated, with 2025 imports valued at **€2.87 billion**. **Germany (31%), Czech Republic (18%), and Poland (14%)** are the top 3 suppliers. Local distributor markups are 8%-15%, with end prices significantly impacted by EUR exchange rates and logistics costs.

DE Share **31%** | CZ Share **18%** | CN Share **6.8%** ▲

Source: Eurostat 2025 Slovakia import origin statistics; Slovak Customs 2025 Annual Report

Product Segment Structure

Slovakia's resin imports are dominated by **Polyethylene (PE), Polypropylene (PP) and Epoxy Resin**. PE holds the highest share, mainly for packaging and construction pipes. PP growth is fastest, driven by automotive lightweighting trends.

Segment	2025 Import Vol. (10k tons)	Share	Main Application
Polyethylene (PE)	14.6	38.7%	Packaging film, pipes
Polypropylene (PP)	10.2	27.1%	Auto parts
Epoxy Resin	5.8	15.4%	Coatings, electronics
PVC Resin	4.3	11.4%	Construction profiles

Source: Eurostat PRODCOM 2025; ZCHFP SR 2025 Annual Report. Some data is carried forward due to no latest public data.

Key End-Product Demand

Slovak auto production reached **1.02 million units** in 2025, boosting engineering resin demand. PVC profiles and pipes demand grew steadily, while PE film demand increased 4% YoY driven by e-commerce. Structural growth in high-performance resins is driven by the EV transition.

End-product Sector	2025 Consumption (10k tons)	Growth Rate
Auto Parts	20.2	+5.1% ▲
Construction Profiles/Pipes	10.8	+2.3% ▲
Packaging Materials	9.5	+4.0% ▲

Source: ZAP SR 2025 Annual Report; Statistical Office of Slovakia 2025 industry consumption data

Intermediates & Raw Materials

Epoxy raw materials in China: **BPA** quotes approx. **9,200-9,800 CNY/ton**, **ECH** approx. **7,500-8,000 CNY/ton**. Slovakia CIF prices carry an **18%-25%** premium over China ex-works, including freight, tariffs, and EU compliance.

Intermediate/Raw Material	China Ex-works Price	Slovakia CIF Estimate
BPA	9,200-9,800 ¥/t	1,350-1,480 €/t
ECH	7,500-8,000 ¥/t	1,100-1,220 €/t
Propylene (Polymer Grade)	6,200-6,600 ¥/t	920-1,020 €/t

Source: Longzhong Info June 2026 BPA/ECH Weekly; Argus Media June 2026 European Chemical CIF. Some data is carried forward.

Trade & Macro Indicators

Slovakia's 2025 GDP growth was approx. **2.2%**, with manufacturing accounting for **21.3%**. EUR/USD stabilized at **1.05-1.09**. China-Slovakia bilateral trade reached **€6.2 billion**, with resin-related products approx. 4.5%.

Macro Indicator	2024	2025
GDP Growth	2.0%	2.2%
Manufacturing Share	20.8%	21.3%
EUR/USD Rate	1.08	1.07
CN-SK Trade (€B)	5.8	6.2

Source: World Bank 2025 Slovakia data; NBS 2025 Annual Report; China Customs 2025 Trade Statistics

Risks & Opportunity Windows

⚠ Risk Full CBAM implementation raises import costs; CEE geopolitics could disrupt logistics.

✓ Opportunity China-Europe Railway Express cuts logistics costs; EV shift in Slovakia creates new demand for high-performance resins; cooperation space exists in localized modification.

Source: EC CBAM Implementation Bulletin Jan 2026; SARIO 2025 Investment Guide; Argus Media May 2026 Risk Alert

▯ Data Source Summary

Eurostat — COMEXT & PRODCOM, 2025 Full Year

Statistical Office of Slovakia — Dec 2025 Bulletin, Industry Consumption

- China Customs — 2025 Annual Trade Statistics
- CCI — June 25, 2026 Resin Spot Quotes
- Longzhong Info — June 2026 Polyolefin & BPA/ECH Weekly
- Argus Media — May-Jun 2026 European Resin Monthly & CIF
- ZAP SR — 2025 Annual Industry Report
- World Bank — 2025 Slovakia Macroeconomic Data
- NBS — 2025 Annual Economic Report
- European Commission — CBAM Bulletin Jan 2026