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Slovakia Coatings Overseas Market Analysis Report

Covering supply-demand fundamentals, China market, Slovakia market, product segments, raw materials, trade & macro, and risks & opportunities

 Report Updated: June 29, 2026

Slovakia Coatings Key Conclusions

Slovakia's annual coatings import market is approximately €280 million, dominated by architectural coatings (55%), with industrial coatings and automotive paint together accounting for 35%. Germany and the Czech Republic are the largest suppliers; China's direct coatings exports account for less than 3%, though indirect penetration via raw materials such as titanium dioxide is significant. EU VOC regulations continue to tighten, water-based coatings demand is growing at roughly 6% per year, domestic capacity is limited, and import dependency remains above 65%.

- Annual coatings imports: approx. €280 million (2025, carried forward)
- Import dependency: 65%–68% , domestic capacity focused on decorative paints
- China share: direct coatings exports <3% , TiO_2 exports approx. 12%
- Price trend: water-based architectural coatings avg. ▲4.2% (YoY) ⚠ Cost Uptick

Source: Eurostat 2025 Annual Report; Statistical Office of the Slovak Republic 2025 Trade Data; SunSirs June 2026 Coatings Raw Material Price Monitoring

Supply-Demand Fundamentals

Slovakia's annual coatings consumption is approximately 180,000 tons, with domestic production at about 62,000 tons; the deficit is filled by imports. Architectural coatings account for 55% of consumption, industrial coatings 30%, and automotive coatings 10%. Total consumption in 2025 edged up 1.8% year-on-year, while imports rose 2.3%.

Indicator	2024	2025	YoY Change
Total Consumption (10k tons)	17.7	18.0	+1.8%
Domestic Production (10k tons)	6.1	6.2	+1.6%
Import Volume (10k tons)	11.6	11.9	+2.3%
Import Dependency	65.5%	66.1%	+0.6pp

Source: Statistical Office of the Slovak Republic 2025 Industrial Yearbook; CEPE 2025 Annual Report

China Market Status

In H1 2026, China's coatings industry operating rate was about 72%, while water-based coatings capacity utilization rose to 68%. The domestic average price of titanium dioxide (coating grade) was 15,800 CNY/ton, with export quotations around 2,100 USD/ton FOB. Coatings exports to the EU are constrained by REACH regulations, with growth slowing.

- Coatings overall operating rate: 72% (June 2026, Longzhong Info)

- TiO_2 (coating grade) avg. price: 15,800 CNY/ton (SunSirs, June 2026)
- China coatings exports to EU: approx. 42,000 tons/year , YoY ▼3.1%
- Water-based coatings capacity utilization: 68% , up 5 pp from 2025

Source: Longzhong Info June 2026 Coatings Weekly Report; SunSirs June 2026 TiO_2 Price Monitoring; China Customs 2025 Export Data

Slovakia Market Status

Slovakia's coatings market is import-driven, with Germany supplying approximately 38%, Czech Republic 22%, Poland 14%, and Italy 8%. Retail prices for architectural coatings range from €4.8 to €6.2 per liter, while industrial coatings CIF prices are about €3.5–€5.0 per kg. Average import prices rose 3.8% year-on-year in Q1 2026.

Supplier	Import Share	Main Category	Price Trend
Germany	38%	Industrial coatings, automotive paint	▲3.5%
Czech Republic	22%	Architectural coatings	▲2.8%
Poland	14%	Decorative paints	▲4.0%
Italy	8%	Wood coatings	▲3.2%

Source: Eurostat 2025 Trade Matrix; Statistical Office of the Slovak Republic Q1 2026 Import Price Index

Product Segment Structure

Coatings are segmented into architectural coatings (mainly water-based), industrial protective coatings, automotive refinish, and wood coatings. Architectural coatings account for 55% of imports by volume, industrial coatings 30%, automotive 10%, and wood 5%. The share of water-based coatings continues to rise, reaching 48%.

Segment	Import Share	Q1 2026 Avg. Price	Demand Trend
Architectural (Water-based)	55%	4.8–6.2 €/L	▲6%
Industrial Protective	30%	3.5–5.0 €/kg	▲3%
Automotive Refinish	10%	8.0–12.0 €/kg	Stable
Wood Coatings	5%	4.0–5.5 €/kg	▼1%

Source: CEPE 2025 Segment Report; Slovak Coatings Distributors Association Q1 2026 Data

Core Finished Product Supply & Demand

Architectural coatings (water-based) represent the largest finished product category, with annual consumption of about 99,000 tons versus domestic output of only 35,000 tons, leaving a supply gap of 64,000 tons. The industrial coatings gap stands at approximately 36,000 tons. Automotive coatings are almost entirely import-dependent, with annual imports of roughly 18,000 tons.

- Architectural coatings gap: 64,000 tons (domestic 35,000t vs. consumption 99,000t)
- Industrial coatings gap: 36,000 tons , mainly from BASF Germany and AkzoNobel
- Automotive coatings imports: 18,000 tons/year , VW Slovakia plant as key end-user
- Inventory turnover: distributors hold 45–55 days , within normal range

Source: Statistical Office of the Slovak Republic 2025 Industrial Output Report; CEPE 2025 European Coatings Supply-Demand Analysis

Intermediates & Raw Material Value

Core raw materials such as titanium dioxide, acrylic resins, and solvents directly impact costs. China-origin TiO_2 FOB quotations are around 2,100 USD/ton, with CIF Slovakia prices at approximately 2,350–2,450 USD/ton. European-origin acrylic resin quotations are about 2,800 EUR/ton.

Raw Material	China Origin Price	Slovakia CIF	Price Gap / Cost Share
TiO_2 (Coating Grade)	2,100 $/t FOB	2,400 $/t CIF	Cost share ~18%
Acrylic Resin	—	2,800 €/t	Cost share ~22%
Organic Solvent (Xylene)	850 $/t FOB	1,050 $/t CIF	Cost share ~8%

Source: SunSirs June 2026 TiO_2 & Solvent Prices; Argus Media June 2026 European Chemical Prices

Trade & Macro Indicators

Slovakia's GDP grew 2.3% in 2025, with construction value added up 3.1%. The EUR exchange rate is stable, at approximately 1 EUR ≈ 1.08 USD. China-Slovakia bilateral trade totals around €4.8 billion, with coatings-related products accounting for less than 1%. The EU anti-dumping investigation into Chinese titanium dioxide is ongoing. ⚠ Policy Risk

- GDP growth: 2.3% (2025, World Bank)
- Construction value added: +3.1% , driving architectural coatings demand
- Exchange rate: 1 EUR ≈ 1.08 USD (June 2026)
- China-Slovakia bilateral trade: approx. €4.8 billion (2025, China Customs)

Source: World Bank 2025 Slovakia Economic Brief; China Customs 2025 Trade Statistics; ECB June 2026 Exchange Rate

Risk & Opportunity Window

Risks: EU VOC regulations tighten further in 2026, restricting solvent-based coating imports; TiO_2 anti-dumping duties could push up costs. Opportunities: green coatings demand growing 6%+ annually; substantial capacity gap in localized water-based coatings; increased CEE infrastructure investment lifting industrial coatings demand. Chinese coatings enterprises can enter via OEM partnerships or raw material supply.

- Risk: EU VOC limit lowered to below 30g/L (2026) ⚠ Compliance Pressure
- Risk: TiO_2 anti-dumping duties potentially at 15%–25%, eroding export margins
- Opportunity: Slovakia "Green Building 2030" plan, water-based coatings demand ▲6.5%
- Opportunity: China-Slovakia bilateral cooperation framework may expand raw material trade Cooperation Window

Source: European Commission 2026 VOC Regulation Update; Slovak Ministry of Environment Green Building Plan; China Ministry of Commerce China-Slovakia Economic Brief June 2026

▯ Data Source Summary

Eurostat — 2025 Trade Matrix and Import Data

Statistical Office of the Slovak Republic — 2025 Industrial Yearbook, Q1 2026 Import Price Index

China Customs — 2025 Coatings and Raw Materials Export Statistics

SunSirs — June 2026 Titanium Dioxide and Solvent Price Monitoring

Longzhong Info — June 2026 Coatings Industry Weekly Report and Operating Rate Data

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World Bank — 2025 Slovakia Economic Brief

Argus Media — June 2026 European Chemical Prices

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China Ministry of Commerce — June 2026 China-Slovakia Economic and Trade Brief