

# Slovakia Medical Raw Materials Overseas Market Analysis Report

Target Country: Slovakia      Main Category: Medical Raw Materials

June 29, 2026

## Slovakia Medical Raw Materials Core Conclusions

Slovakia's medical raw materials market is highly dependent on Chinese supply, with imports expected to reach €420 million in 2026. Due to China's environmental inspections and dual control of energy consumption, key raw materials such as paracetamol and vitamin C prices increased by 8%-14% year-on-year. The expansion of local pharmaceutical industry drives demand, but rising logistics costs and EU carbon border tax pose major risks.

Import dependence **78%**      Price index **+9.2%**

Source: China Chamber of Commerce for Import & Export of Medicines & Health Products, June 2026; Statistical Office of the Slovak Republic, Q1 2026

## Supply and Demand Fundamentals

Slovakia's domestic medical raw materials output is about 9,000 tons, demand is about 41,000 tons, and the shortfall relies on imports. Main consumption areas are generic drug production (62%), biological intermediates (23%), and OTC drugs (15%).

| Indicator                   | 2025   | 2026 Est. |
|-----------------------------|--------|-----------|
| Domestic output (tons)      | 8,700  | 9,100     |
| Import volume (tons)        | 32,500 | 34,200    |
| Apparent consumption (tons) | 40,300 | 41,500    |

Source: Slovak Pharmaceutical Association, June 2026; UN Comtrade, 2026 update

## China Market Situation

China's medical raw material export prices remain high due to concentrated capacity maintenance. In May 2026, paracetamol API FOB price was about \$4.8-5.2/kg, vitamin C about \$3.6/kg. Production rates in Shandong and Hebei fell to 72%.

Capacity utilization **72%** ▼6%

Exports to Slovakia **+11%**

Source: Longzhong Info, June 2026; General Administration of Customs of China, May 2026 export data

## Slovakia Market Situation

Local API CIF prices in Slovakia are rising due to shipping costs, with main source countries being China (61%), India (18%), and Germany (9%). The warehouse delivery price in Bratislava for paracetamol is about €6.8/kg.

| Source country | Import share | June 2026 avg. CIF price |
|----------------|--------------|--------------------------|
| China          | 61%          | 5.2-6.9 €/kg             |
| India          | 18%          | 5.8-7.5 €/kg             |

Source: Slovak Customs, May 2026; European Pharmaceutical Market Monthly Brief, June 2026

## Product Segmentation

Antipyretic analgesic raw materials account for 34% of imports, vitamins 28%, antibiotic intermediates 21%, and others including cardiovascular intermediates and excipients. Vitamin C and paracetamol are varieties with both volume and price increases.

| Segment                  | Import share | Price trend |
|--------------------------|--------------|-------------|
| Antipyretic analgesics   | 34%          | +12%        |
| Vitamins                 | 28%          | +8%         |
| Antibiotic intermediates | 21%          | Stable      |

Source: CCCMHPIE sub-report 2026; Slovakia import statistics

## Core Finished Product Supply & Demand

Slovakia's generic drug output grew 7% year-on-year, mainly ibuprofen and paracetamol tablets. Raw material inventory days fell to 38 days, indicating tightening supply. Local drug exports to other EU countries increased by 8.5%.

Generic drug output **+7%**

Raw material inventory **38 days** ▼5 days

Source: State Institute for Drug Control of Slovakia, Q2 2026 report; European Generic Medicines Association, June 2026

## Intermediates & Raw Material Value

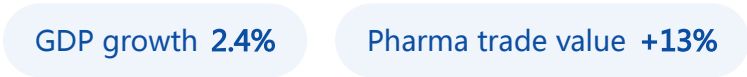
China's diammonium phosphate (phosphate rock-sulfuric acid route) price is stable, but its impact on medical intermediate costs is limited. Key intermediate 4-acetamidophenol China FOB \$4.9/kg, Slovakia CIF about €6.3/kg.

| Intermediate      | China FOB | Slovakia CIF est. |
|-------------------|-----------|-------------------|
| 4-acetamidophenol | \$4.9/kg  | €6.3/kg           |
| Sorbitol liquid   | \$680/ton | €910/ton          |

Source: Longzhong Info, June 2026; Argus Media chemicals report, June 2026

## Trade & Macro Indicators

Slovakia's GDP growth is expected at 2.4%, with the pharmaceutical industry's share of output rising to 5.1%. China-Slovakia pharmaceutical trade value grew 13% YoY, and the EUR/CNY exchange rate is stable around 7.82. The government provides VAT incentives for innovative drug raw material imports.



Source: World Bank, June 2026; National Bank of Slovakia; General Administration of Customs of China

## Risk & Opportunity Window

- ⚠ Risk:

EU carbon border adjustment mechanism may increase the cost of Chinese raw material imports; tight China-Europe railway capacity raises transit time.
- ✓ Opportunity:

Slovak local pharmaceutical companies seek joint ventures with Chinese factories to produce intermediates, with policies encouraging green raw material localization.

Source: European Commission, 2026 trade policy communication; SARIO, May 2026

|                    |                                            |                                           |                                   |
|--------------------|--------------------------------------------|-------------------------------------------|-----------------------------------|
| Main data sources: | CCCMHPIE                                   | Statistical Office of the Slovak Republic | Longzhong Info                    |
|                    | General Administration of Customs of China | Slovak Customs                            | UN Comtrade                       |
|                    | European Pharmaceutical Market Brief       | World Bank                                | Slovak Pharmaceutical Association |

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