Slovakia Auto Parts Overseas Market Analysis Report

Target Country: Slovakia | Main Category: Auto Parts | Report Updated: June 29, 2026

Slovakia Auto Parts Core Conclusions

Slovakia has the highest per capita car production in the world, with approximately 1.03 million vehicles produced in 2024. Auto parts import dependency is about 65%, with China being the third largest source. From 2025 to 2026, parts prices saw a moderate rise driven by raw material and logistics costs. The EU Carbon Border Adjustment Mechanism (CBAM) and supply chain localization policies pose core medium-to-long-term risks.

2024 Vehicle Production: ~1.03M | Parts Import Dependency: ~65% | ⚠ EU CBAM Expanding to Auto Parts | China's Parts Exports to SK: ~$520M (2024)

Source: Slovak Automotive Industry Association (ZAP SR), March 2025 Annual Report; General Administration of Customs of China (GACC), January 2025 Statistical Bulletin. Some 2026 data carries forward previous values.

Supply-Demand Fundamentals

The market demand for auto parts in Slovakia is about €8.5-9.5 billion (2024). Local capacity focuses on tires, plastic parts, and some metalwork, while high-value electronics and precision components rely heavily on imports. OEM supporting accounts for ~70% of demand, with the aftermarket at ~30%.

Indicator	2023	2024	YoY Change
Total Parts Market Size (€100M)	~88	~91	+3.4%
Local Production Share	~33%	~35%	+2pp
Total Imported Parts (€100M)	~59	~59	Stable
Total Vehicle Production (10k units)	108	103	-4.6%

Source: ZAP SR Annual Report (published March 2025); Eurostat Trade Database, updated April 2025. June 2026 carries forward previous values.

China Market Status

China's auto parts exports have maintained overall growth. Auto parts exports to the EU were about $17.5 billion in 2024, with exports to Slovakia reaching approximately $520 million, a year-on-year increase of about 8%. Tires, electronic components, and braking systems are the top three export categories. China's capacity utilization rate remains high, with robust export competitiveness.

2024 Exports to SK: ~$520M | YoY Growth: +8.3% | Export Utilization Rate: ~82% (2025 Q4)

Source: General Administration of Customs of China (GACC), January 2025 Statistical Bulletin; China Association of Automobile Manufacturers (CAAM), December 2025 Industry Brief. June 2026 carries forward previous values, no latest public data.

Slovakia Market Status

Slovakia's auto parts market is driven by four major OEM plants. Imported parts were about €5.9 billion in 2024. Germany was the largest supplier (~28%), followed by the Czech Republic (~16%), and China in third place (~9%). Parts consumption is dominated by OEM supporting, with rapidly growing demand for new energy vehicle components.

Import Source Country	Share (2024)	Main Categories
Germany	~28%	Electronic systems, drivetrain parts
Czech Republic	~16%	Body parts, plastic parts
China	~9%	Tires, electronic components, brakes
South Korea	~7%	Electronic modules, battery parts

Source: Eurostat COMEXT database, extracted April 2025; Statistical Office of the Slovak Republic, 2025 Q1 Trade Bulletin. June 2026 carries forward previous values.

Product Segmentation

Among imported auto parts in Slovakia, tires and rubber products are the largest single category, followed by electronic/electrical systems and braking system components. The import growth rate for new energy vehicle parts (related to the powertrain) is significantly higher than traditional parts, up about 22% year-on-year in 2024.

Product Segment	2024 Import Value (€100M)	YoY Growth Rate
Tires & Rubber Products	~11.5	+4.1%
Electronic & Electrical Systems	~10.8	+9.6%
Braking Systems & Parts	~7.2	+5.8%
Filters & Filtration Systems	~3.5	+3.3%

Source: Eurostat Prodcom & COMEXT, April 2025; ZAP SR Segment Report, March 2025. June 2026 carries forward previous values.

Core Product Supply & Demand – Tires

Tires are the single largest auto parts import category in Slovakia by value. Imports were about €1.15 billion in 2024, with tires from China accounting for about 18%. Local tire production capacity is limited; Continental AG has a plant in Púchov but mainly exports. The supply gap of about €800 million is filled by imports.

Local Tire Output: ~€350M | Import Dependency: ~70% | Avg. Chinese Tire Price: €42-68/unit (Passenger Car)

Source: European Tyre and Rubber Manufacturers Association (ETRMA), February 2025 Statistics; China Rubber Industry Association, January 2025. June 2026 carries forward previous values.

Intermediate Goods & Raw Material Value

Auto parts costs are significantly impacted by steel, natural rubber, aluminum ingots, and petrochemical raw material prices. In 2025, natural rubber prices rose about 12% compared to the 2024 average. Chinese hot-rolled coil prices fluctuated narrowly, while aluminum prices stayed high driven by energy costs. Raw material cost transmission to parts terminal prices lags about 2-3 months.

Raw Material	China Origin Price (2025 Q4)	Europe CIF Reference Price
Natural Rubber (SCR5)	~¥13,200/metric ton	~€1,580/metric ton
Hot-Rolled Coil (Q235)	~¥3,850/metric ton	~€510/metric ton
Aluminum Ingot (A00)	~¥19,500/metric ton	~€2,450/metric ton

Source: Sunsirs (100ppi.com), December 2025 Rubber/Steel/Non-Ferrous Monthly Report; Oilchem, December 2025. June 2026 carries forward previous values, no latest public data.

Trade & Macro Indicators

Slovakia's GDP growth rate was about 2.1% in 2024, with the automotive industry accounting for about 12.5% of GDP. The Euro exchange rate was relatively stable, and China-Slovakia bilateral trade continued to grow. The Slovak government provides investment incentives for foreign-funded auto parts enterprises, with a corporate income tax rate of 21%.

Indicator	2023	2024
GDP Growth Rate	1.6%	2.1%
Auto Industry Share of GDP	12.8%	~12.5%
Average EUR/CNY Exchange Rate	7.85	7.78
China-SK Bilateral Trade ($100M)	~68	~73

Source: World Bank, April 2025 Country Data; National Bank of Slovakia (NBS), March 2025; Ministry of Commerce of China (MOFCOM), January 2025. June 2026 carries forward previous values.

Risk & Opportunity Window

Geopolitical tensions and EU supply chain localization policies are the biggest risks, but Chinese parts still hold advantages in cost-effectiveness and responsiveness. The transformation of Slovakia to new energy vehicles brings new demand for powertrain parts, and there is broad space for China-Slovakia cooperation in electrification.

⚠ Risk: EU CBAM expansion to auto parts may increase compliance costs from 2027; Slovak government pushes to raise localized procurement ratio to 40%.

★ Opportunity: Rapidly growing demand for new energy vehicle parts (battery trays, motor housings); Chinese companies setting up warehouses in Slovakia can shorten delivery cycles and enhance competitiveness.

Source: European Commission CBAM Policy Documents, June 2025; ZAP SR Strategic Outlook, March 2025; Economic and Commercial Office of the Chinese Embassy in Slovakia, December 2025.

Data Sources Summary

- Slovak Automotive Industry Association (ZAP SR), Annual Report, published March 2025
- General Administration of Customs of China (GACC), Statistical Bulletin, January 2025
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- Oilchem, Raw Material Price Monitoring, December 2025
- Ministry of Commerce of China (MOFCOM), China-SK Bilateral Trade Statistics, January 2025
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