Overseas Market Analysis Report

Slovakia Tire Overseas Market Analysis Report

Target Country: **Slovakia** Main Category: **Tire (HS 4011)** Report Update: June 29, 2026

Slovakia Tire Core Conclusions

As a key automotive manufacturing hub in Central and Eastern Europe, Slovakia consumes **6.5-7.5 million tires annually**, with over 70% import dependency. Chinese tire market share has expanded to **18-20%**, with PCR replacement tires as the core growth driver. Raw material prices remained range-bound in June 2026, keeping overall cost pressure manageable.

Local Annual Consumption (Est.)	**6.5-7.5 million units**
Import Dependency	**~70-75%**
Chinese Tire Import Share (2025)	**18-20%**
Key Risk Variables	**EU CBAM · OE Certification Barriers**

Source: Eurostat Comext, ETRMA European Tire Annual Report, Statistical Office of the Slovak Republic, data compilation from Q4 2025 to Q1 2026

Supply & Demand Fundamentals

Slovakia's domestic tire capacity is limited; the Continental Puchov plant produces about 3 million commercial vehicle tires annually, while passenger car tires are almost entirely imported. OE matching demand fluctuates with vehicle output, but the replacement market maintains steady growth.

Indicator	2024	2025 (Est.)	YoY Change
Local Production (10k units)	280	290	+3.6%
Import Volume (10k units)	420	445	+6.0%
Total Consumption (10k units)	680	710	+4.4%
OE Matching Share	48%	47%	-1pp

Source: ETRMA Quarterly Statistical Report, Eurostat Comext database, updated March 2026; 2025 data are ETRMA estimates

China Market Status

In the first half of 2026, China's tire industry maintained high operating rates, with semi-steel tire operating rates at approximately **78-82%** and all-steel tire at **65-70%**. Export orders to Europe continued to grow, with Slovakia-bound export volume increasing about 12-15% year-on-year.

Semi-steel Tire Operating Rate (June 2026)	**~80%**
All-steel Tire Operating Rate (June 2026)	**~67%**

PCR Average Export Price (FOB China)	$28-35/unit
Export Growth to Slovakia (YoY)	+12~15%

Source: Longzhong Info weekly tire operating rate report (4th week of June 2026), General Administration of Customs of China HS 4011 monthly export statistics (May 2026)

Slovakia Market Status

Slovakia's tire retail market prices are heavily influenced by brand tiers, with premium brand PCR tire retail prices at about **€65-120/unit**, while Chinese brands concentrate in the **€38-60/unit** range. Import sources are diversified, with China as the second largest source country.

Import Source Country	2024 Share	2025 Share (Est.)	Trend
Germany	22%	21%	→
China	17%	19%	↑
Czech Republic	13%	12%	→
South Korea	10%	9%	↓

Source: Eurostat Comext, Statistical Office of the Slovak Republic trade database, updated April 2026; 2025 shares are estimates based on Q1-Q3 data

Product Segment Structure

Slovakia's tire consumption is dominated by passenger car tires (PCR), accounting for about **75-78%**. Chinese tires perform prominently in the PCR replacement market, but face competitive pressure from Continental's local plant in the truck and bus tire (TBR) segment.

Segment	Consumption Share	Chinese Import Share	Price Range (€/unit)
PCR Replacement	52%	24%	38-90
PCR OE Matching	24%	8%	30-55
TBR Truck & Bus	18%	14%	120-280
OTR/Agricultural	6%	11%	200-800

Source: ETRMA segment report, Eurostat trade classification data, Q4 2025; OE matching share estimated based on data from the Slovak Automotive Industry Association

Core Product Supply & Demand

PCR passenger car tires are the largest single category in Slovakia, with annual demand at about **5.0-5.4 million units**, and a significant domestic supply gap. Chinese PCR tires penetrate the replacement market rapidly with cost-performance advantages, but OE matching certification barriers remain the main bottleneck.

PCR Annual Demand (10k units)	500-540
Local PCR Production (10k units)	≈0 (no scale capacity)
PCR Import Dependency	~98%

Chinese PCR Avg Import Price (CIF)	**€32-42/unit**

Source: Eurostat Comext HS 401110 detail, ETRMA European PCR Market Annual Report, full-year 2025 data; trends continuing in Q1 2026

Intermediate & Raw Material Value

> Natural rubber prices held in the **USD 1.62-1.72/kg** range in June 2026, essentially flat compared to the same period in 2025. Synthetic rubber prices were supported by butadiene costs, and carbon black prices edged up due to tight coal tar supply; overall raw material costs provided mild support to tire ex-factory prices.

Raw Material	China Price (June 2026)	Europe CIF Reference	MoM Change
NR TSR20	¥14,500/t	$1.68/kg	+0.8%
SBR	¥12,800/t	€1,580/t	+1.2%
Carbon Black N330	¥7,200/t	€920/t	+2.0%

Source: 100ppi.com NR/SR quotes (June 27, 2026), Longzhong Info carbon black weekly report (4th week June 2026); Europe CIF prices are trader reference quotes

Trade & Macro Indicators

> Slovakia's economy maintains moderate growth, with Q1 2026 GDP growth of approximately **2.1%** year-on-year. The automotive sector accounts for about 12% of GDP, serving as the core driver of tire consumption. The EUR/CNY exchange rate fluctuated in a range of **7.85-8.05**.

Slovakia GDP Growth (Q1 2026)	**+2.1%**
Automotive Share of GDP	**~12%**
EUR/CNY Exchange Rate (June 2026)	**7.92**
Total Tire Imports (2024)	**~€400 million**

Source: Statistical Office of the Slovak Republic GDP flash estimate (May 2026), European Central Bank reference exchange rate (June 27, 2026), Eurostat trade data

Risk & Opportunity Windows

> ⚠ **Risk Alert:** The EU Carbon Border Adjustment Mechanism (CBAM) is gradually extending to rubber products, potentially increasing export costs for Chinese tires from 2027; OE matching certification in Slovakia takes 12-18 months, making short-term breakthroughs difficult.

Geopolitical Risk · Supply Chain Diversification · CBAM Carbon Tariff · OE Matching Breakthrough

Opportunity: Replacement Market Share Gain	**Chinese Brand Awareness ↑**
Opportunity: CEE Warehousing Layout	**Reduce Logistics Cost**
Risk: Ocean Freight Cost Volatility	**Red Sea Situation Aftershocks**

Source: EC CBAM Implementation Roadmap (updated Feb 2026), SARIO policy briefings, industry research synthesis

Data Sources Summary

1. Eurostat Comext — EU statistical office trade database, HS 4011 tire import detail data, updated April 2026

2. ETRMA — European Tyre and Rubber Manufacturers Association, European tire market quarterly and annual statistical reports, Q4 2025

3. General Administration of Customs of China — HS 4011 tire export monthly statistics, May 2026 data

4. Longzhong Information — weekly tire industry operating rate report and carbon black market weekly report, 4th week of June 2026

5. 100ppi.com — natural rubber and synthetic rubber spot price quotes, June 27, 2026

6. Statistical Office of the Slovak Republic — GDP flash and trade statistics, published May 2026

7. European Central Bank — euro reference exchange rate, June 27, 2026

8. Slovak Automotive Industry Association — automotive production and industry annual data, 2025

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