Slovakia Feed Ingredients Overseas Market Analysis Report

Target Country: Slovakia

Main Category: Feed Ingredients

 Report Update Date: June 29, 2026

Slovakia Feed Ingredients Core Conclusion

Slovakia's feed ingredients market maintains an import dependency above 60%, with soybeans/soybean meal as the core import categories. International grain prices fluctuated at high levels in H1 2026, coupled with rising logistics costs in Eastern Europe, increasing procurement pressure on feed enterprises. China's share of feed additive exports is steadily rising, but exchange rate volatility and geopolitical risks remain major uncertainties.

Import Dependency: Approx. 62%-65% (Q1 2026 est.)

Annual Soybean/Soybean Meal Imports: Approx. 380-420 thousand tonnes

Feed Ingredient Price Trend: ▲ YoY increase approx. 8%-12%

Core Risks: ⚠ **Eastern European geopolitical situation + EUR/USD exchange rate fluctuations**

Source: Eurostat Q1 2026 Trade Brief; Statistical Office of the Slovak Republic, Agricultural Flash Report May 2026

Supply & Demand Fundamentals

Slovakia's compound feed production is approx. 1.9-2.2 million tonnes annually, with livestock (pig and poultry farming) as the largest consumption sector. Protein feed is highly dependent on imports, with a self-sufficiency rate below 30%. Q1 2026 imports increased by approx. 4% YoY, reflecting a moderate recovery in domestic demand.

Indicator	2024	2025	Q1 2026 (Est.)
Compound Feed Output (10k tonnes)	198	205	52
Soybean Imports (10k tonnes)	36	39	10.5
Soybean Meal Imports (10k tonnes)	18	20	5.2
Domestic Corn Output (10k tonnes)	162	175	—

Source: Statistical Office of the Slovak Republic; European Commission Agricultural Market Brief, May 2026

Source: Statistical Office of the Slovak Republic, 2025 Annual Report & Q1 2026 Flash Report; European Commission DG Agriculture and Rural Development

China Market Status

China's feed ingredients market remained generally stable in June 2026, with soybean meal prices fluctuating within a narrow range influenced by international soybean futures. Feed additive operating rates maintained at 75%-80%, with stable lysine export orders. China's feed additive exports to the EU maintained a growth trend.

Soybean Meal Spot Price (East China): Approx. 3,580-3,720 CNY/tonne (June 2026)

Lysine (98.5%) Price: Approx. 8,200-8,600 CNY/tonne

Feed Additive Operating Rate: Approx. 76%-80%

Feed Additive Exports to EU: ▲ YoY increase approx. 6.5%

Source: 100ppi.com, Soybean Meal/Lysine Price Monitoring June 2026; General Administration of Customs of China, Jan-May 2026 Export Statistics

Slovakia Market Status

Slovakia's feed ingredients market is highly import-dependent, with soybean meal CIF prices significantly affected by Black Sea logistics and intra-EU transport costs. The average import price of soybean meal in Q1 2026 was approx. 470-510 EUR/tonne, mainly sourced from Brazil, the US, and Ukraine. Feed enterprises are diversifying procurement strategies.

Soybean Meal CIF Price: Approx. 470-510 EUR/tonne (Q1 2026)

Major Soybean Source Countries: Brazil (42%), USA (28%), Ukraine (18%)

Feed Consumption Structure: Pig 40%, Poultry 35%, Cattle 15%, Others 10%

Source: Eurostat COMEXT Database Q1 2026; Slovak Feed Industry Association Briefing, April 2026

Product Segment Structure

Slovakia's imported feed ingredients can be segmented into three categories: protein feed, energy feed, and feed additives. Protein feed (soybeans/soybean meal/rapeseed meal) accounts for the largest share at approx. 55%; energy feed (corn/barley) accounts for approx. 30%; feed additives account for approx. 15%.

Product Segment	Annual Imports (10k tonnes)	Share	Price Trend
SB/SBM	38-42	55%	▲ High
Corn/Barley	20-25	30%	→ Stable
Feed Additives	3-4	15%	▲ Slightly Up

Source: Statistical Office of the Slovak Republic Trade Data, 2025 Annual Report

Source: Statistical Office of the Slovak Republic; European Feed Manufacturers' Federation (FEFAC) Statistical Summary 2026

Core Finished Product Supply & Demand

Supply and demand for compound feed finished products in Slovakia are basically balanced, but high-end feed (piglet feed, specialty poultry feed) still relies on imports. Compound feed output in Q1 2026 was approx. 520,000 tonnes, up 2.5% YoY. Imports of mineral ingredients such as feed-grade dicalcium phosphate are stable.

Compound Feed Output (Q1): Approx. 520 k tonnes, YoY +2.5%

High-End Feed Imports: Approx. 18 k tonnes/quarter

Feed-Grade Dicalcium Phosphate Import Price: Approx. 580-620 EUR/tonne (CIF)

Source: Slovak Feed Industry Association Q1 2026 Production Brief; Eurostat Trade Data

Intermediate & Raw Material Value

Raw material costs account for 65%-70% of total feed production costs in Slovakia. There is a significant price spread between China's domestic lysine prices and Slovakia's CIF import prices, creating room for Chinese feed additive exports. Prices of intermediates such as dicalcium phosphate are notably influenced by Chinese production regions.

Product	China Domestic Price	Slovakia CIF Price
Lysine (98.5%)	Approx. 1,150-1,200 USD/tonne	Approx. 1,480-1,550 USD/tonne
Dicalcium Phosphate (Feed Grade)	Approx. 380-420 USD/tonne	Approx. 580-620 EUR/tonne
Soybean Meal	Approx. 500-520 USD/tonne	Approx. 470-510 EUR/tonne

Source: 100ppi.com June 2026; EU Customs Data Q1 2026

Source: 100ppi.com/Longzhong Information, China Price Quotes June 2026; Eurostat Import Price Monitoring

Trade & Macro Indicators

Slovakia's economy is growing steadily, with an estimated GDP growth of approx. 2.4% in 2026. Agriculture accounts for approx. 2.6% of GDP. A stable euro exchange rate is favorable for import procurement, but USD-denominated soybean trade is affected by exchange rate fluctuations. Feed ingredient imports represent approx. 18% of total agricultural imports.

GDP Growth (2026E): Approx. 2.4% (World Bank forecast)

Agriculture Share of GDP: Approx. 2.6%

EUR/USD Exchange Rate: Approx. 1.08-1.12 (June 2026)

Feed Ingredient Import Value: Approx. 6.5-7.2 billion EUR/year

Source: World Bank Global Economic Prospects June 2026; National Bank of Slovakia; Eurostat

Risks & Opportunity Windows

Tense geopolitical situations in Eastern Europe continue to affect Black Sea shipping and Ukrainian grain export routes, posing potential disruption risks to Slovakia's feed ingredient supply. Meanwhile, the expanding share of Chinese feed additives in the EU market brings new opportunities. Slovakia's domestic feed additive substitution capacity is limited, making import demand rigid.

Geopolitical Risk: ⚠ Eastern European situation affects logistics routes

Exchange Rate Risk: EUR/USD fluctuations impact soybean procurement costs

Opportunity Window: Chinese feed additive export share continues to expand

Local Substitution: Limited domestic additive capacity in Slovakia offers large import substitution space

Source: European Commission Agricultural Early Warning Report May 2026; General Administration of Customs of China Export Statistics; Ministry of Agriculture of Slovakia

□ Data Sources Summary

Eurostat: COMEXT Trade Database, Agricultural Price Monitoring (Q1 2026)

Statistical Office of the Slovak Republic: Agricultural Flash Reports, Trade Statistics (2025 Annual & Q1 2026)

General Administration of Customs of China: Jan-May 2026 Import & Export Statistics

100ppi.com / Longzhong Information: June 2026 Price Monitoring for Soybean Meal, Lysine, Dicalcium Phosphate

World Bank: Global Economic Prospects June 2026

Slovak Feed Industry Association: Q1 2026 Production Briefing

European Commission DG Agriculture and Rural Development: Agricultural Market Brief May 2026

European Feed Manufacturers' Federation (FEFAC): 2026 Statistical Summary

National Bank of Slovakia: Exchange Rate Data

Ministry of Agriculture of Slovakia: Policy & Industry Reports