Overseas Market Analysis Report

Slovakia Fertilizer Overseas Market Analysis Report

- Target Country: Slovakia
- Main Category: Fertilizer
- Report Date: June 29, 2026

Slovakia Fertilizer: Key Conclusions

Slovakia's fertilizer market has an import dependence of about 85%, with annual consumption of approximately 280,000–320,000 tonnes (nutrient basis). Influenced by the EU's Farm to Fork strategy and the Green Deal, nitrogen fertilizer demand is in a structural decline, while phosphorus and potassium fertilizer demand remains relatively stable. Direct exports from China to Slovakia are limited, but the competitive edge of phosphate products re-routed through EU traders is gradually strengthening.

⚠ The EU Carbon Border Adjustment Mechanism (CBAM) is likely to be extended to the fertilizer sector in the second half of 2026, raising uncertainty over import costs.

- Import dependence: ~85% , domestic production covers only about 15% of consumption
- Annual consumption: ~ 280,000–320,000 tonnes (nutrient basis), N fertilizers account for about 60%
- Key risks: CBAM extension , geopolitical supply chain volatility, EUR/USD exchange rate

Source: Eurostat 2025 annual report; Slovak Ministry of Agriculture Annual Report 2025; Argus Media Europe Fertilizer Market Q1 2026

Supply and Demand Fundamentals

Slovakia's fertilizer market features limited domestic production with imports dominating supply. The only major domestic producer, Duslo Šaľa (part of Agrofert Group), has an annual capacity of about 500,000 tonnes (product basis), mainly nitrogen fertilizers. Phosphorus and potassium fertilizers are almost entirely imported, primarily from neighboring EU countries such as Germany, Poland, and Austria.

Indicator	Value	Trend
Annual consumption (nutrient basis)	280,000–320,000 t	↓ gradual decline
Domestic production (nutrient basis)	~45,000–50,000 t	→ stable
Net imports (nutrient basis)	~240,000–270,000 t	↓ slight decline
Import dependence	~85%	→ elevated

Source: Statistical Office of the Slovak Republic 2025 yearbook; Eurostat fertilizer trade data 2025; using previous values, no latest public update as of June 2026

China Market Overview

China's fertilizer market has been broadly stable in the first half of 2026, with urea operating rates staying high and diammonium phosphate (DAP) exports under policy regulation. Domestic fertilizer prices fluctuate between cost support and off-season reserve demand. Phosphorus fertilizer exports proceed in an orderly manner under the quota system, maintaining stable indirect supply capacity to the European market.

- Urea ex-factory price (Shandong): ~ RMB 2,050–2,280/ton , a slight recovery from the beginning of the year
- DAP ex-factory price (Hubei): ~ RMB 3,550–3,850/ton

- Urea industry operating rate: ~ 73–77% , capacity utilization at a moderately high level
- DAP export quota system continues; H1 2026 exports down ~8–12% YoY

Source: Longzhong Info weekly fertilizer price monitor, June 2026; Shengyishe Fertilizer Channel, June 2026; General Administration of Customs of China export data, Jan–May 2026

Slovakia Market Overview

Fertilizer prices in Slovakia are notably affected by EU-wide supply-demand dynamics and global energy cost pass-through. In Q2 2026, urea CIF prices were in the range of EUR 350–410/ton, and DAP CIF prices at EUR 520–590/ton. The main import sources are Germany, Poland, and Austria, which together account for over 60% of import volumes.

Product	Slovakia CIF Price (EUR/ton)	Main Source Countries
Urea (granular)	350–410	Germany, Poland, Austria
DAP	520–590	Germany (re-routed), Poland
Potassium chloride (MOP)	310–370	Germany, Belgium
NPK 15-15-15 compound	390–460	Poland, Hungary, Austria

Source: Argus Media Europe Fertilizer Price Assessment, June 2026; Eurostat trade flow data 2025; using previous values

Product Structure

Nitrogen fertilizer dominates Slovakia's fertilizer consumption, with calcium ammonium nitrate (CAN) and urea being the most widely used nitrogen products. For phosphorus, DAP/MAP are the main types; for potassium, MOP is the dominant product. NPK compound fertilizers are seeing faster growth in horticulture and high-value-added crops.

Sub-category	Annual Consumption Share (Est.)	Demand Trend
N fertilizer (CAN/Urea/UAN)	~58–63%	↓ policy-driven reduction
P fertilizer (DAP/MAP/TSP)	~16–19%	→ slightly up
K fertilizer (MOP/SOP)	~14–17%	→ stable
Compound NPK	~6–8%	↑ horticultural demand growth

Source: Slovak Ministry of Agriculture fertilizer consumption statistics 2025; IFA Global Fertilizer Consumption Report 2025; using previous values

Key Finished Product Supply and Demand

Urea and CAN are the core fertilizer products in the Slovak market. Domestic producer Duslo Šaľa produces about 180,000–220,000 tonnes of CAN and 120,000–150,000 tonnes of urea annually (product basis), which fall short of domestic demand. The shortfall is covered by imports from Germany and Poland. DAP and potassium fertilizers are entirely import-dependent.

- CAN domestic production: ~ 180,000–220,000 t/yr (product basis), Duslo Šaľa plant
- Urea domestic production: ~ 120,000–150,000 t/yr (product basis), imports fill gap of 80,000–100,000 t
- DAP wholly import-dependent: ~ 40,000–60,000 t/yr imported (product basis)
- CAN supply deficit of ~ 50,000–80,000 t/yr , filled by Germany and Poland

Source: Duslo Šaľa official capacity disclosure 2025; Statistical Office of the Slovak Republic industrial output report 2025; using previous values

Intermediate & Raw Material Value

In fertilizer production, synthetic ammonia (for nitrogen fertilizers), phosphate rock/phosphoric acid (for phosphorus fertilizers), and potassium chloride (for potassium fertilizers) are the three key intermediates. European synthetic ammonia prices are heavily influenced by natural gas costs; in Q2 2026, CIF Northwest Europe ammonia was around EUR 480–550/ton, still higher than prices in China's producing regions.

Intermediate / Raw Material	China Price	Slovakia CIF Price (Est.)
Synthetic ammonia	RMB 2,800–3,200/ton	EUR 480–550/ton
Phosphate rock (30% P_2O_5)	RMB 650–800/ton	— (imported as phosphoric acid)
Potassium chloride (MOP)	RMB 2,350–2,700/ton	EUR 310–370/ton

- Cost pass-through: European natural gas prices are higher, making European ammonia production cost about 25–40% higher than in China

Source: Longzhong Info synthetic ammonia price, June 2026; Argus Media Europe Ammonia Weekly, June 2026; Shengyishe phosphate rock / potash price, June 2026

Trade & Macro Indicators

As an EU member state, Slovakia's fertilizer trade operates within the EU single market framework. In 2025, Slovakia's GDP growth was about 2.1%, and agriculture accounted for about 2.8% of GDP. Under the EU's common external tariff system, most non-EU sourced fertilizers face a 6.5% MFN tariff (for certain product categories).

- Slovakia GDP growth: ~2.1% (2025), projected 1.8–2.3% in 2026
- Agriculture share of GDP: ~ 2.8% ; agricultural land: ~1.9 million hectares
- EUR/USD exchange rate: fluctuating in 1.08–1.12 range (June 2026)
- EU MFN tariff on fertilizers: 6.5% (some products), applicable to Chinese products

Source: World Bank Slovakia economic data 2025; European Commission TARIC tariff database 2026; National Bank of Slovakia exchange rate report, June 2026

Risks and Opportunity Windows

Geopolitical tensions continue to affect the global fertilizer supply chain. As a landlocked EU country, Slovakia has high dependency on land transport logistics. The EU's green transition policies are driving the development of biofertilizers and precision fertilization technologies, creating differentiated competition opportunities for China's high-efficiency fertilizers and controlled-release products.

⚠ Note: If CBAM is extended to fertilizers, it will significantly increase the import costs for non-EU sourced fertilizers.

- Opportunity: China's high-efficiency products such as controlled-release and water-soluble fertilizers have differentiated market space in Slovakia's horticulture and high-value-added agriculture.
- Risk: The potential extension of CBAM to fertilizers raises compliance costs and price pressure for non-EU suppliers.
- Opportunity: Building re-routing channels through Central Eastern European trade partners such as Poland and Hungary to lower market entry barriers.
- Risk: EUR/CNY exchange rate fluctuations affect the CIF competitiveness of Chinese fertilizers.

Source: European Commission CBAM policy document, 2026 update; Argus Media Europe Fertilizer Market Analysis, June 2026; Slovak Investment and Trade Development Agency (SARIO) report 2025

Data Sources

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