OVERSEAS MARKET ANALYSIS

Slovakia Pesticide Overseas Market Analysis Report

Target Country: **Slovakia** Main Category: **Pesticide** Report Update: June 29, 2026

Key Takeaways: Slovakia Pesticides

Slovakia's pesticide market has an annual import volume of approximately EUR 110–130 million, with an import dependency exceeding 95%. Herbicides hold the largest share (approx. 47%), with fungicides and insecticides at 28% and 18%, respectively. The EU Farm to Fork Strategy targets a 50% reduction in pesticide use by 2030, coupled with stricter MRL standards, posing core policy risks. China's pesticide exports to Slovakia are growing steadily, but stronger compliance certification is needed to overcome green barriers.

Annual import volume	≈EUR 120 million
Import dependency	>95%
Herbicide share	≈47%
Core risk	EU Farm to Fork reduction targets

Source: Eurostat pesticide sales statistics 2025 annual report; Slovak Ministry of Agriculture 2025 annual report; European Commission Farm to Fork Strategy document (issued 2020, ongoing implementation). Some data carry forward prior values; no new publicly available update as of June 2026.

Supply-Demand Fundamentals

Slovakia has no large-scale local pesticide production; market supply is entirely import-dependent. Annual pesticide consumption (in active ingredients) is approximately 4,800–5,500 tonnes. Germany, France, and Austria are the top three import sources, collectively accounting for about 60% of imports. Consumption is primarily driven by cereal and oilseed crop applications.

Indicator	Value	YoY Trend
Annual import volume (active ingredient)	≈5,200 tonnes	Stable →
Domestic production	Negligible	—
Re-export volume	≈400 tonnes	Slight decline ↓
Apparent consumption	≈4,800 tonnes	Stable →

Source: Eurostat Comext database 2025Q4; FAO STAT pesticide use statistics; Statistical Office of the Slovak Republic 2025 agricultural yearbook. No latest publicly available data as of June 2026; prior values used.

China Market Overview

China ranks first globally in pesticide technical material output, with total pesticide exports of approximately 2.1 million tonnes in 2025. Glyphosate technical prices remained in the range of RMB 28,000–32,000/tonne in Q1 2026, with an average operating rate of about 68%. Exports to the EU face pressure from active substance re-evaluation, increasing compliance costs.

Glyphosate technical price (Q1 2026)	RMB 28,000–32,000/t
Industry avg. operating rate	≈68%
2025 total pesticide exports	≈2.1 million tonnes
EU export trend	Rising compliance costs

Source: Business Society glyphosate price monitoring March 2026; General Administration of Customs of China 2025 pesticide export statistics; Zhuochuang Information pesticide industry operating rate report Q1 2026. June 2026 data carries forward prior values.

Slovakia Market Overview

Pesticide distribution prices in Slovakia are influenced by the EUR exchange rate and EU technical material costs, with end-user formulation prices rising approximately 3%–5% year-on-year in H1 2026. Import sources are heavily concentrated within the EU (Germany approx. 25%, France approx. 18%, Austria approx. 14%), while China's direct export share is about 6%–8%, though indirect flows via EU distributors are substantial.

Import Source	Share	Main Category
Germany	≈25%	Fungicides, Herbicides
France	≈18%	Herbicides, Insecticides
Austria	≈14%	Herbicides
China (direct)	≈6%–8%	Technical & Formulations

Source: Eurostat Comext 2025 trade data; Slovak Customs import statistics annual report. June 2026 carries forward prior values; no latest publicly available update.

Product Segmentation

Herbicides dominate Slovakia's pesticide consumption (approx. 47%), mainly applied to cereals and cornfields. Fungicides account for about 28%, driven by sclerotinia control in oilseed rape. Insecticides represent about 18%, with the remainder being plant growth regulators and others. Biopesticides, though a small share, are growing rapidly at about 8%–10% annually.

Category	Share	Demand Trend
Herbicides	≈47%	Stable →
Fungicides	≈28%	Slight increase ↑
Insecticides	≈18%	Slight decline ↓
Biopesticides & Others	≈7%	Rapid growth ↑

Source: Slovak Pesticide Industry Association 2025 annual report; Eurostat pesticide sales by category statistics; FAO STAT. June 2026 data carries forward prior values.

Key Finished Products Supply-Demand

> Glyphosate formulations, triazole fungicides (e.g., tebuconazole), and neonicotinoid insecticides are the three core finished products in the Slovak market. Glyphosate sees stable short-term demand due to the EU re-evaluation extension until end-2026; triazole fungicide demand fluctuates slightly with oilseed rape acreage; neonicotinoid insecticides face increasingly strict restrictions due to bee toxicity concerns.

Glyphosate formulation annual imports	≈800–1,000 tonnes (formulation)
Triazole fungicide demand	Stable, ~2% annual growth
Neonicotinoid insecticide trend	Gradually restricted
Inventory level	Normal to tight

Source: EU glyphosate re-evaluation progress report January 2026; Slovak Pesticide Importers Association data; EFSA pesticide active substances database. June 2026 data partially carries forward prior values.

Intermediates & Raw Material Value

> China-produced glyphosate technical FOB price is approximately USD 3,800–4,200/tonne; after adding EU import duties and logistics costs, the Slovakia CIF price is around USD 4,600–5,100/tonne. Price fluctuations of key intermediates—glycine and dimethyl phosphite—directly impact technical material costs. Rising energy and transport costs drive overall supply chain expenses higher.

Product	China FOB Price	Slovakia CIF Est.
Glyphosate technical	3,800–4,200 USD/t	4,600–5,100 USD/t
Glycine (intermediate)	1,500–1,700 USD/t	—
Dimethyl phosphite	1,100–1,300 USD/t	—

Source: Business Society chemical raw material price monitoring May 2026; Mysteel agrochemical raw material weekly report; Argus Media agrochemical price index. June 2026 data uses latest prior values.

Trade & Macro Indicators

Slovakia's 2025 GDP growth rate was approximately 2.1%, with agriculture accounting for about 2.8% of GDP. The EUR/CNY exchange rate fluctuates within the 7.5–7.9 range, affecting import costs. Bilateral trade between China and Slovakia is growing steadily; pesticide products benefit from the EU common tariff policy, with an MFN import duty on Chinese pesticides of approximately 6.5%.

Slovakia GDP growth (2025)	≈2.1%
Agriculture share of GDP	≈2.8%
EUR/CNY exchange rate range	7.5–7.9
Pesticide import duty (MFN)	≈6.5%

Source: World Bank Slovakia economic data 2025 annual report; EU TARIC tariff database; National Bank of Slovakia exchange rate statistics. June 2026 data carries forward prior values.

Risk & Opportunity Window

Risk The EU Farm to Fork pesticide reduction targets, increasingly stringent active substance re-evaluations, and EUR exchange rate volatility constitute the main risks. The supply chain is overly reliant on Western European channels, leaving room to increase China's direct export share.

Opportunity The biopesticide market is growing at 8%–10% annually; the China-Slovakia bilateral agricultural cooperation framework provides a policy window for pesticide exports, and early compliance entrants can capture shares in green alternative categories.

Geopolitical risk	Low (stable EU member)
Exchange rate risk	EUR/CNY volatility ±5%
Biopesticide opportunity	8%–10% annual growth
Bilateral cooperation framework	China-Slovakia Agricultural Cooperation MOU

Source: European Commission Farm to Fork progress report 2025; Slovak Investment and Trade Development Agency; Economic and Commercial Office of the Chinese Embassy in Slovakia. June 2026 data partially carries forward prior values.

Data Sources Summary

- Eurostat — Comext trade database & pesticide sales statistics
- General Administration of Customs of China — 2025 pesticide export statistics
- Business Society — Glyphosate and chemical raw material price monitoring
- Statistical Office of the Slovak Republic — 2025 agricultural yearbook
- FAO STAT — Pesticide usage statistics database
- European Commission — Farm to Fork Strategy and pesticide active substance re-evaluation documents
- Mysteel / Zhuochuang Information — Agrochemical raw materials and industry operating rate reports
- Argus Media — Agrochemical price index
- World Bank — Slovakia macroeconomic data
- Slovak Pesticide Industry Association — 2025 annual industry report

Note: Report update date is June 29, 2026. For some data items where no latest publicly available update exists as of June 2026, "prior values carried forward" has been noted. All data comes from traceable public reports.