Slovakia Agricultural Film Overseas Market Analysis Report

Target Country: Slovakia   Category: Agricultural Film

 Report Date: June 29, 2026

Slovakia Agricultural Film: Key Conclusions

Slovakia's agricultural film demand is approx. 42,000 tonnes/year with import dependency exceeding 85%. Chinese raw material prices are fluctuating upward, while Germany and Poland remain Slovakia's main suppliers. Tightening EU plastics regulations and freight rate volatility pose major risks.

Annual Demand	**~42,000 tonnes**
Import Dependency	**85% – 88%**
China PE Agri-Film Quote	**12,200 CNY/tonne ↑2.5%**
Key Risk	**EU SUP Derivative Regulation**

Source: Eurostat, Argus Media Agricultural Film Weekly (2026.06.25)

Supply & Demand Fundamentals

Slovakia's domestic agricultural film production is limited to approx. 6,000 tonnes, with consumption at 42,000 tonnes; the deficit is met by imports. Greenhouse and silage films are the main consumption segments.

Item	Volume (kt)	YoY
Domestic Production	0.6	-3.1%
Import Volume	3.7	+4.2%
Export Volume	0.1	-
Apparent Consumption	4.2	+2.8%

Source: Statistical Office of the Slovak Republic, Eurostat Comext (Updated May 2026)

China Market Status

China's agricultural film operating rate remains around 68%, with factory-gate prices for linear film in North China fluctuating. EU-bound export orders are affected by shipping, extending delivery lead times.

Shandong Double-Proof Film EXW	**11,800–12,500 CNY/tonne**
National Operating Rate	**68% ↑1.2%**
Raw Material LDPE (2426H)	**10,550 CNY/tonne**

Source: Longzhong Information, Zhuochuang Information (2026.06.28)

Slovakia Market Status

Local CIF prices are influenced by the German premium, with retail prices around €2.85–3.10/kg. Germany and Poland account for 62% of imports, while China's share has risen to 14%.

Retail Reference Price	**2.95 €/kg**
Top Import Source	**Germany (38%)**
China Import Share	**14% ↑1.8%**

Source: Platts Agriculture, Slovak Customs Trade Bulletin (2026.06)

Product Segment Structure

Main imported categories are LDPE greenhouse film, silage wrap film and black mulch film. Mulch film demand is affected by EU biodegradable policies, with traditional PE mulch film imports declining.

Category	Import Share	Price Trend
LDPE Greenhouse Film	48%	+3.1%
Silage Stretch Film	32%	Stable
Biodegradable Mulch Film	12%	+8.2%

Source: APE Europe Quarterly Report (Q2 2026)

Key Finished Product Supply & Demand

Three-layer co-extruded long-life greenhouse film is in tight supply; only one production line operates locally in Slovakia. Q2 2026 imports rose 12% YoY, with inventories at a medium-low level.

Greenhouse Film Imports (Q2)	**18,000 tonnes**
Local Inventory Index	**47 (Medium-Low)**
Silage Film Deficit	**~9,000 tonnes/year**

Source: Slovak Chamber of Agriculture and Food (2026.06.15)

Intermediates & Raw Material Values

LDPE/LLDPE raw material prices remain elevated; declining China-Europe ocean freight rates support exports. Slovakia's indicative CIF prices are affected by the German regional premium.

China LDPE 2426H	**10,550 CNY/tonne**
Europe LDPE Spot (FD NWE)	**1,385 €/tonne**
Slovakia CIF Indication	**1,520 €/tonne**

Source: ICIS, Argus Media (June 2026 Weekly Assessment)

Trade & Macro Indicators

Slovakia's GDP is growing moderately, with agricultural value-added at 2.1%. The EUR/CNY exchange rate is stable, and Sino-Slovak trade volume has increased YoY.

GDP Growth (Q1 2026)	**2.3%**
EUR/CNY	**7.92**
Agri-Film Import Tariff	**6.5% (EU CN)**

Source: World Bank, National Bank of Slovakia, General Administration of Customs of China (2026.06)

Risk & Opportunity Window

⚠ **Risk** EU plans to mandate 30% recycled content in agricultural film by 2027. ✦ **Opportunity** China's leading biodegradable mulch film technology offers potential for expanded exports to Slovakia.

Regulatory Risk	**Recycled Content Mandate**
Exchange Rate Volatility	**±3% Risk Exposure**
Substitution Opportunity	**PBAT Mulch Film Exports +18%**

Source: Plastics Europe, CCCMC (2026.06)

▯ Key Data Sources Summary

1. Argus Media – Agricultural Film Market Weekly (2026.06.25)
2. Eurostat Comext (2026.05)
3. Longzhong Information / Zhuochuang Information (2026.06.28)
4. Statistical Office of the Slovak Republic & Customs Bulletin (2026.06)
5. APE Europe Q2 Report
6. ICIS / Platts Agriculture Price Assessments
7. Slovak Chamber of Agriculture and Food (2026.06.15)
8. General Administration of Customs of China & World Bank Macro Data