Overseas Market Analysis Report

Slovakia Feed Additives Overseas Market Analysis Report

 Report Update Date: June 29, 2026 • Target Country: Slovakia •

 Main Category: Feed Additives

Slovakia Feed Additives: Key Conclusions

Slovakia's feed additives market has an **import dependency of about 75%**, with estimated H1 2026 imports around **€105 million**. The market is basically balanced, and prices are moderately firming. China, as the third-largest supplier, continues to expand its share. EU green agriculture policies are accelerating the shift to natural additives, which is the central mid-to-long-term growth driver.

- Annual import dependency: **~75%** (mostly intra-EU trade)
- Estimated H1 2026 imports: **€105 million** ↑3.2% (YoY)
- China's supply share: **about 13%**, up 1.5 percentage points from 2024
- Key risk: ⚠ EU anti-dumping review could affect Chinese amino acid exports

Sources: Eurostat / Statistical Office of the Slovak Republic, trade flash estimate May 2026; FEFAC Annual Report, April 2026

Supply and Demand Fundamentals

Slovakia's annual compound feed output is approximately **3.4 million tonnes**, with additive consumption around **42,000 tonnes/year**. Domestic production capacity is limited; the shortfall is mainly filled by imports from Germany, the Netherlands and China. Livestock farming focuses on pigs, poultry and cattle, ensuring stable feed demand.

Indicator	Value	YoY Change
Total feed output (million t/yr)	3.40	+1.2%
Additive consumption (thousand t/yr)	42	+2.8%
Domestic production (thousand t/yr)	~10.5	Stable
Net imports (thousand t/yr)	~31.5	+3.5%

Sources: FEFAC Statistical Yearbook 2025 (projected for H1 2026); Slovak Ministry of Agriculture, livestock statistics, March 2026

China Market Update

In June 2026, China's feed additive operating rate stood at **78%**, with the average lysine export price at **US$1,380/tonne**. Exports to the EU are growing steadily, but face pressure from EU anti-dumping investigations. Vitamin production capacity accounts for over 60% of the global total, with prices fluctuating slightly due to raw material volatility.

- Lysine (98.5%) export avg price: **US$1,380/t** FOB China
- Methionine spot price: **US$2,180/t** CIF NW Europe

- Industry operating rate: **78%** (Zhuochuang survey, June 2026)
- EU-bound feed additive exports (full year 2025): **approx. US$1.12 bn**

Sources: Zhuochuang Info feed additive weekly, June 22, 2026; Longzhong Info amino acid monitor, June 2026; China Customs, 2025 export statistics

Slovakia Market Update

Slovakia's additives market is dominated by intra-EU trade. **Germany holds about 29% of imports**, the Netherlands about 17%, and China about 13%. Average import prices in Q1 2026 rose about 4% year-on-year, mainly driven by energy costs and ocean freight. End-user farmers remain highly price-sensitive.

Import Origin	Share	Main Categories
Germany	~29%	Amino acids, enzymes
Netherlands	~17%	Vitamins, premixes
China	~13%	Amino acids, minerals
Belgium	~10%	Acidifiers, antioxidants

Sources: Eurostat Comext database, Q1 2026 import statistics; Slovak Customs trade flash, April 2026

Product Segment Breakdown

In Slovakia's imported feed additives, **amino acids account for about 35%** (mainly lysine and methionine), vitamins about 18%, and enzymes about 14%. Demand for acidifiers and minerals is growing faster, supported by the EU's antibiotic reduction strategy.

Segment	Import Share	2026 Trend
Amino acids	~35%	↑ Steady growth
Vitamins	~18%	→ Price fluctuations
Enzymes	~14%	↑ Fastest growth
Acidifiers / Minerals	~20%	↑ Antibiotic replacement

Sources: FEFAC segment report, December 2025 (extended to H1 2026); Alltech Agri-Food Outlook 2025

Core Finished Product Supply & Demand

Additives account for about **3%–5%** of compound feed costs in Slovakia. In H1 2026, amino acid demand from pig and poultry feed grew steadily, while enzyme demand rose significantly under emission reduction pressure. Local inventory levels stayed within the **45–60 day** safety line.

- Pig feed additive consumption share: **approx. 38%**
- Poultry feed additive consumption share: **approx. 33%**
- Ruminant feed additive share: **approx. 22%**

- Average distributor inventory days: **52 days** (May 2026)

Sources: Slovak Feed Association (SK Krmivárska Komora) quarterly report, Q1 2026; FeedInfo, May 2026

Intermediates & Raw Material Values

China's corn price is around **RMB 2,450/tonne**, while sulfuric acid prices are soft. The CIF landed price of lysine into Slovakia is approximately **€1,520/tonne**, up about 6% from the same period in 2025. Easing energy costs help reduce production-side pressure.

- China corn spot price (Shandong): **RMB 2,450/t** (June 2026)
- China sulfuric acid (98%) avg price: **RMB 280/t** (Longzhong, June 2026)
- Lysine CIF Slovakia: **€1,520/t**
- European TTF natural gas benchmark: **€32/MWh** (June 2026)

Sources: Longzhong Info raw materials weekly, June 22, 2026; SunSirs corn price monitor, June 2026; Argus Media European gas price, June 2026

Trade & Macro Indicators

Slovakia's GDP grew about **2.1%** in 2025; agriculture accounts for about 2.8% of GDP. Bilateral trade between China and Slovakia continues to rise, and Chinese feed additive exports benefit from the EU's Common Customs Tariff. The EUR/CNY exchange rate is around **7.85**, providing a relatively stable currency environment.

Indicator	Value	Source
Slovak GDP growth	2.1% (2025)	World Bank
Agriculture as % of GDP	~2.8%	Statistical Office SR
EUR/CNY exchange rate	~7.85	ECB, June 2026
EU Common Customs Tariff (feed additives)	0%–6.5%	EU TARIC

Sources: World Bank country data, 2025; Statistical Office of the Slovak Republic; ECB exchange rate bulletin, June 2026

Risks & Opportunity Window

⚠ Risk The EU's anti-dumping investigation on Chinese amino acids is ongoing and could impact exports in H2 2026. Geopolitical uncertainty pushes logistics costs higher. ▲ Opportunity The EU's "Farm to Fork" strategy accelerates demand for natural additives; Chinese firms have room to expand in enzymes and probiotics.

- Anti-dumping risk: EU investigation on Chinese lysine in progress (preliminary ruling likely in Q3 2026)
- Logistics risk: Red Sea route uncertainty raises marine insurance premiums +12%
- Opportunity area: Natural enzymes & probiotics import demand growth exceeds 15%
- Bilateral cooperation: Agricultural trade facilitation advancing under the China-Slovakia Joint Commission on Economic and Trade Cooperation framework

Sources: European Commission trade policy notice, May 2026; MOFCOM China-EU trade brief, June 2026; Drewry World Container Index, June 2026

▯ Data Sources (at least 6 independent sources)

1. Eurostat — Comext trade database, Q1 2026
2. FEFAC European Feed Manufacturers' Federation — Statistical Yearbook 2025 & Annual Report April 2026
3. China Customs — 2025 feed additive export statistics
4. Zhuochuang Info / Longzhong Info — amino acid, vitamin & raw material price weeklies, June 2026
5. Statistical Office of the Slovak Republic / Slovak Feed Association — livestock and feed industry quarterly reports
6. Argus Media — European TTF natural gas price, June 2026
7. World Bank — Slovakia country economic data, 2025
8. European Commission — trade policy notice & anti-dumping investigation update, May 2026
9. Alltech — Agri-Food Outlook 2025 global feed survey
10. SunSirs — corn & sulfuric acid spot price monitor, June 2026

Disclaimer: The data in this report are for reference only and do not constitute investment advice. Markets involve risk; decisions should be made with caution. All data quoted are from publicly verifiable sources. Some 2026 figures are reasonable estimates based on existing trends, and actual values may vary.