

Slovakia Grain and Cereal Overseas Market Analysis Report

□ Target Country: Slovakia □ Main Category: Grain and Cereals

□ Report Updated: June 29, 2026

Slovakia Grain and Cereals Core Conclusions

Slovakia's grain and cereal market is largely self-sufficient, but structural gaps are concentrated in high-quality feed grains and some processing raw materials. In the 2025/26 marketing year, wheat production is estimated at about 2.1 million tons and corn at about 1.55 million tons. Affected by EU CAP policy adjustments and the indirect impact of the Russia-Ukraine conflict, the market is increasingly sensitive to external supply chain fluctuations, with prices remaining at a medium-high range.

Indicator	Value	YoY Change
Grain self-sufficiency rate	approx. 115%	flat
Feed grain import dependence	approx. 22%	+3pp
Average farm price of wheat	€198/ton	+5.2%

Source: Statistical Office of the Slovak Republic (ŠÚSR) 2025 Annual Agricultural Report; European Commission MARS Bulletin December 2025

Supply and Demand Fundamentals

In the 2025/26 marketing year, Slovakia's total grain production is estimated at about 4.6 million tons, domestic consumption at about 4.1 million tons, with a surplus of about 0.5 million tons for export or stockpiling. Wheat dominates production, followed by corn. Feed consumption accounts for about 58%, food and processing consumption about 28%, and the rest for seed and industrial use.

Crop	Output (10k tons)	Import (10k tons)	Export (10k tons)
Wheat	210	18	45
Corn	155	42	8
Barley	68	12	22

Source: FAO Food Outlook November 2025; Slovak Chamber of Agriculture and Food (SPPK) 2025 Annual Brief

China Market Status

China is the world's largest grain importer, with grain imports of about 62 million tons in 2025, mainly soybeans, corn, and sorghum. Domestic wheat prices are supported by the minimum purchase price policy, and corn prices remain high due to strong demand from deep processing. China's direct grain exports to Slovakia are negligible, but its exports of fertilizers and agricultural machinery indirectly support Slovak agricultural production.

Crop	Domestic Avg Price (CNY/ton)	Imports (10k tons)
Wheat	2,740	980
Corn	2,480	2,100

Source: China National Grain and Oils Information Center December 2025; General Administration of Customs of China 2025 Annual Statistics

Slovakia Market Status

Slovakia's grain market is dominated by the EU common market pricing mechanism. The front-month wheat contract on the Bratislava Grain Exchange is around €205/ton. Import dependence is about 18%, with main sources being Czech Republic, Hungary, Austria, and Ukraine. Feed processing and beer brewing are the two key consumption sectors.

Source Country	Import Share	Main Categories
Czech Rep.	31%	Wheat, Corn
Hungary	27%	Corn, Barley
Ukraine	19%	Feed Corn

Source: Statistical Office of the Slovak Republic (ŠÚSR) Foreign Trade Database Q3 2025; EU DG Agri Price Monitoring December 2025

Segmented Product Structure

Slovakia's grain consumption structure is dominated by feed-grade grains, while food-grade wheat and malting barley are high-value segments. Import demand for feed corn continues to grow, and malting barley has strong export competitiveness. Price gaps between grades are significant, with a premium of €25-35/ton for quality wheat.

Sub-category	Annual Consumption (10k tons)	Price Range (€/ton)
Feed Wheat	95	180-200
Food Wheat	58	210-235
Malting Barley	25	240-270

Source: Slovak Beer and Malt Association 2025 Report; SPPK Grain Grading Price Weekly November 2025

Core Processed Products Supply & Demand

Flour and malt are the core processed products of Slovakia's grain processing. Annual flour production is about 420,000 tons, meeting domestic demand with a small surplus for export. Malt production is about 180,000 tons, with about 65% exported to breweries in Germany and Poland. Compound feed production totals about 1.6 million tons, with corn-soybean meal formulations dominating.

Product	Annual Output (10k tons)	Export Share
Wheat Flour	42	12%
Brewing Malt	18	65%

Source: Slovak Flour Industry Association 2025 Annual Report; EU Malt Trade Statistics 2025

Intermediate Goods and Raw Material Values

Fertilizers and fuel are key cost items in Slovak grain cultivation. Urea FOB from China is about \$340/ton, and CIF in Slovakia is about €385/ton. Seed costs account for about 8% and pesticides about 6%. Energy price fluctuations significantly impact drying and transportation.

Raw Material / Intermediate	China Production Price	Slovakia CIF Indication
Urea (Granular)	\$340/ton FOB	€385/ton CIF
DAP	\$520/ton FOB	€570/ton CIF

Source: Longzhong Information Fertilizer Prices November 2025; Argus Media European Fertilizer CIF December 2025

Trade and Macroeconomic Indicators

Slovakia's GDP growth rate in 2025 is about 2.1%, with agriculture accounting for about 3.6% of GDP. Total grain imports and exports are about €480 million, with a trade surplus of about €120 million. The euro exchange rate is relatively stable, at €1≈\$1.08, providing a cost buffer for dollar-denominated imported agricultural inputs.

Indicator	Value	Remarks
GDP Growth	2.1%	2025 estimate
Grain Trade Surplus	€120 million	incl. finished products
EUR/USD	1.08	2025 average

Source: World Bank Slovakia Country Report December 2025; National Bank of Slovakia Exchange Rate Statistics

Risks and Opportunity Windows

The ongoing Russia-Ukraine conflict continues to affect Black Sea grain logistics. Slovakia, as a transit route for Ukrainian grain, faces transit pressure and price volatility risks. The EU's CAP 2027 reform

may cut direct subsidies, but green agriculture investments bring new opportunities for precision agriculture and organic grains.

⚠ Risk Alert: Fluctuations in the volume of Ukrainian grain transiting through Slovakia may disrupt the local price system; rising energy costs squeeze farming margins.

□ Opportunity Window: Organic grain certified area grows 12% annually, with significant export premiums to Western Europe; introduction of precision agriculture technology can reduce unit costs by 8-15%.

Source: European Commission Agricultural Outlook 2025; Slovak Ministry of Agriculture CAP Implementation Assessment 2025

□ Data Sources Summary

Statistical Office of the Slovak Republic (ŠÚSR) – 2025 Annual Agricultural Report and Foreign Trade Database	European Commission Directorate-General for Agriculture and Rural Development (DG Agri) – MARS Bulletin and Price Monitoring December 2025
Food and Agriculture Organization of the United Nations (FAO) – Food Outlook November 2025	Slovak Chamber of Agriculture and Food (SPPK) – 2025 Annual Brief and Grain Grading Weekly
China National Grain and Oils Information Center – December 2025 Domestic Grain Market Report	General Administration of Customs of China – 2025 Annual Grain Import and Export Statistics
Longzhong Information – Fertilizer FOB Price Monitoring November 2025	Argus Media – European Fertilizer CIF Assessment December 2025
World Bank – Slovakia Country Economic Report December 2025	National Bank of Slovakia (NBS) – Exchange Rate Statistics 2025
Slovak Flour Industry Association – 2025 Annual Processed Products Report	EU Malt Trade Statistics Database – 2025 Data

⚠ Disclaimer: This report data is for reference only and does not constitute any investment advice. Markets are risky; decisions should be made with caution.