

Slovakia Apparel Overseas Market Analysis Report

Report update date: June 29, 2026

Target country: Slovak Republic

Main category: Apparel (incl. footwear & accessories)

Slovakia Apparel Core Conclusions

Slovakia's apparel market has over 90% import reliance, with China firmly the largest supplier. The 2025 market size is around €1.8 billion, e-commerce penetration has reached 28%, and athleisure/sportswear leads growth. Core risks focus on EU carbon border policy spillover, supply chain diversification trends, and EUR exchange rate volatility.

Import dependence: approx. 92%

2025 market size: ~€1.8 bn

E-commerce penetration: 28% ▲2.5pct

Share from China imports: approx. 31%

▲ Monitor EU textile carbon label policy progress

Sources: Eurostat Q4 2025 report; Statistical Office of the Slovak Republic 2025 annual report; General Administration of Customs of China 2025 data

Supply & Demand Fundamentals

Slovakia's domestic apparel production capacity is extremely limited, covering only about 8% of demand, with heavy reliance on imports from China, Germany, Italy, Bangladesh and others. Apparel imports reached approximately €1.65 billion in 2025, while consumption is dominated by casual everyday wear and functional sportswear.

Indicator	2023	2024	2025E
Domestic output (€100m)	1.25	1.32	1.38
Imports (€100m)	15.1	15.9	16.5
Exports (€100m)	1.05	1.10	1.15
Apparent consumption (€100m)	15.3	16.1	16.7

Sources: Eurostat Comext database Dec 2025; Statistical Office of the SR, industrial output report Q3 2025

China Market Status

China has ample apparel production capacity. Exports to Slovakia reached approximately €510 million in 2025, accounting for 31% of Slovakia's total apparel imports. The domestic textile & garment industry operating rate stays around 78%. Cross-border e-commerce (e.g., SHEIN, Temu Europe) has become a major incremental channel, and the relatively stable RMB exchange rate supports export competitiveness.

Exports to Slovakia (2025): ~€510 m

Industry operating rate: 78% →flat

Cross-border e-commerce share: +6pct to 19%

EUR/CNY exchange rate: ~7.75

Sources: General Administration of Customs of China, Dec 2025 monthly bulletin; China National Textile and Apparel Council Q4 2025 report

Slovakia Market Status

Slovakia's apparel retail is dominated by international fast-fashion brands (H&M, ZARA, LPP, etc.) and e-commerce platforms. Consumers are highly price-sensitive; the mid-to-low price segment (€10-40/piece) accounts for over 65% of sales volume. Bratislava is the core consumption city, contributing about 38% of retail revenue.

Main import origins: China 31%, Germany 18%, Italy 12%, Bangladesh 9%

Mid-low price share: 65%

Online retail share: 28% (2025)

Core consumption city: Bratislava (38%)

Sources: Statistical Office of the SR, retail trade report 2025; Euromonitor Slovakia Apparel 2025

Product Segmentation

Womenswear leads imports at 42%, followed by menswear (28%) and childrenswear (14%). Sportswear grows fastest (YoY +11%), and functional outdoor apparel benefits significantly from demand driven by Slovakia's mountain tourism. Knitted garments account for about 55%, woven about 35%.

Category	Import share	YoY growth	Avg. price (€/pc)
Womenswear	42%	+6%	18-22
Menswear	28%	+4%	22-28
Childrenswear	14%	+5%	12-16
Sport/Outdoor	16%	+11%	25-40

Sources: Eurostat Prodcom & Comext 2025 data; Textile Intelligence Q4 2025

Core Finished Product Supply & Demand

Knitted garments (T-shirts, hoodies, etc.) are the largest finished product category imported by Slovakia, reaching about €480 million in 2025. Woven outerwear and trousers follow closely. With no large-scale domestic apparel manufacturing, finished products are almost entirely imported. Retail inventory days are around 58 days.

Knitted garment imports: ~€480 m (29% share)

Woven outerwear/trousers imports: ~€390 m (24% share)

Footwear imports: ~€310 m

Retail inventory days: 58 days

Sources: Eurostat Dec 2025 update; Slovak Business Federation retail monitoring report 2025

Intermediates & Raw Materials Value

Chinese cotton yarn and synthetic fabrics hold significant price advantages internationally. In 2025, average export prices were approx. €3.2/kg for cotton yarn and €1.8/m for polyester fabric. CIF landed prices in Slovakia carry a premium of about 18%-25%, mainly due to logistics and tariff costs.

Item	China origin price	Slovakia CIF price	Premium
Cotton yarn (€/kg)	3.2	3.8-4.0	~20%
Polyester fabric (€/m)	1.8	2.1-2.3	~22%
Nylon fabric (€/m)	2.5	3.0-3.2	~24%

Sources: China Textile Information Center 2025 price monitoring; Argus Media textile raw materials Q4 2025

Trade & Macro Indicators

Slovakia's 2025 GDP growth is approx. 2.1%, with inflation falling to 3.2%. Under the unified Eurozone tariff system, apparel imports apply the EU Common External Tariff (TARIC) with a MFN rate of 12% for China-origin goods. Bilateral trade between China and Slovakia totals around €6.8 billion, with apparel being a Chinese surplus category.

GDP growth (2025): 2.1%

Inflation rate: 3.2% ▼1.5pct

Apparel import tariff (MFN): 12%

China-Slovakia bilateral trade: ~€6.8 bn

EUR/CNY exchange rate: 7.75

Sources: World Bank Slovakia economic brief 2025; EU TARIC database 2025; MOFCOM China 2025 data

Risks & Opportunity Windows

Key risks include rising compliance costs from the upcoming EU textile carbon labeling regulation and the shift towards near-shore supply chains (Turkey, Poland). Opportunity windows lie in Slovakia's continuously rising e-commerce penetration, rapid growth of direct cross-border e-commerce shipping modes, and the supply gap in the functional apparel segment.

□ Risk: EU CBAM spillover to textiles

□ Risk: Near-shore supply chain substitution (Turkey+Poland share up to 24%)

□ Opportunity: Cross-border e-commerce direct shipping +35% YoY

□ Opportunity: Outdoor functional apparel import gap ~€210 m

▲ Monitor progress of the EU Digital Product Passport

Sources: European Commission Textile Strategy Update 2025; McKinsey Fashion Report 2025; China Council for the Promotion of International Trade 2025 report

□ Data Sources (9 sources in total)

- Eurostat Comext & Prodcom Database — Eurostat, updated December 2025
- General Administration of Customs of China — Monthly bulletin, December 2025
- World Bank — Slovakia Economic Brief, 2025
- Euromonitor International — Slovakia Apparel & Footwear 2025
- McKinsey & Company — The State of Fashion 2025 Report
- Statistical Office of the Slovak Republic — Retail trade report, industrial output report, 2025
- China National Textile and Apparel Council — Industry operation report Q4 2025
- EU TARIC Tariff Database — latest query 2025
- Argus Media — Textile raw material price monitor, Q4 2025

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets involve risk, and decisions should be made with caution.