Slovakia Glass Equipment Overseas Market Analysis Report

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Target Country: Slovakia | Main Category: Glass Equipment | Data as of: June 2026

Slovakia Glass Equipment Key Conclusions

Slovakia's glass equipment market has an annual import value of approximately **€65 million**, with import dependency exceeding 75%. In H1 2026, the full implementation of the EU Carbon Border Adjustment Mechanism (CBAM) pushed up local glass production costs, driving approximately **8%** YoY growth in demand for new equipment and production line upgrades. Chinese equipment, with its cost-performance advantage, has increased its market share in Slovakia to approximately **12%**, but faces challenges from upgraded EU CE certification requirements and localized service demands.

- Slovakia annual glass equipment imports: approximately **€65 million** (2025 data, carried forward to June 2026)
- Import dependency: **76%**, limited domestic equipment manufacturing capacity
- China's market share in Slovakia: approximately **12%**, up 1.5 percentage points YoY

⚠ Risk Alert: The 2026 revised EU Machinery Directive may take effect in H2; Chinese export equipment must complete compliance upgrades in advance, with certification lead times expected to extend by 2-4 months.

Source: Eurostat, Full-Year 2025 Trade Data; Statistical Office of the Slovak Republic, Q1 2026 Briefing

Supply and Demand Fundamentals

Slovakia's total annual demand for glass equipment is approximately **€85 million**, while domestic supply is only about €20 million, with the gap filled by imports. Demand is driven by three main segments: container glass (42%), flat glass (30%), and technical glass (28%).

Indicator	2024	2025	YoY Change
Domestic Total Demand (€10k)	7,800	8,500	+9.0%
Local Supply (€10k)	1,850	2,000	+8.1%
Total Imports (€10k)	5,950	6,500	+9.2%
Import Dependency	76.3%	76.5%	+0.2pp

Source: Eurostat Trade Database, Updated March 2026; Statistical Office of the Slovak Republic Industrial Report

China Market Status

In 2025, China's total glass machinery exports reached approximately **USD 3.12 billion**, up 6.8% YoY. The share of exports to the EU rose to 14%, with direct exports to Slovakia at approximately **USD 18 million**. The domestic glass equipment industry operating rate remained in the 78%-82% range, indicating ample production capacity.

- China glass machinery total exports (2025): **USD 3.12 billion** , YoY +6.8%
- Direct exports to Slovakia: approximately **USD 18 million** , YoY +11.2%
- Industry operating rate: **80%** (Q1 2026, carried forward), sufficient capacity utilization

Source: General Administration of Customs of China, Dec 2025 Import/Export Statistics; China Glass Industry Association, Q1 2026 Industry Briefing

Slovakia Market Status

Slovakia's glass equipment market prices have moderately risen amid EU inflation, with the composite equipment price index up approximately 3.2% YoY in H1 2026. The top three import source countries are Germany (38%), Italy (24%), and China (12%). VETROPACK and RONA are the largest end users.

- Equipment price index: YoY +3.2% (June 2026, Eurostat PPI)
- Import sources: Germany **38%** , Italy **24%** , China **12%** , Czech Republic **10%**
- Largest local buyers: VETROPACK Nemšová (container glass), RONA Lednické Rovne (crystal glass)

Source: Eurostat PPI Data, May 2026; Slovak Customs Trade Statistics, Full-Year 2025

Product Segment Structure

Among Slovakia's imported glass equipment, **hot-end equipment** (furnaces, IS machines) accounts for the largest share at 45%, **cold-end equipment** (lehrs, inspection lines) at 30%, and **deep processing equipment** (tempering furnaces, laminating lines) at 25%. China holds a clear competitive advantage in the deep processing equipment segment.

Sub-Category	Import Share	Avg Price Trend	China Share
Hot-End Equipment (Furnace/IS Machine)	45%	+2.8%	7%
Cold-End Equipment (Lehr/Inspection)	30%	+3.5%	14%
Deep Processing (Tempering/Laminating)	25%	+4.1%	20%

Source: Slovak Customs HS Code Statistics, Full-Year 2025; China Customs Export Classification Data

Core Finished Product Supply and Demand

Slovakia's annual glass product output is approximately **620,000 tons**, with container glass at 55%, flat glass at 30%, and crystal/technical glass at 15%. VETROPACK's packaging glass production line plans a 15% expansion in 2026, serving as the primary driver of new equipment demand.

- Container glass output: **340,000 tons** /year, led by VETROPACK, expansion ongoing
- Flat glass output: **186,000 tons** /year, AGC Slovakia supplies construction and automotive sectors
- Crystal glass: RONA annual output approximately **94,000 tons** , high-end export-oriented

⚠ Capacity Alert: VETROPACK expansion project equipment procurement has commenced; the bidding window for Chinese equipment suppliers is Q3-Q4 2026.

Source: Statistical Office of the Slovak Republic Industrial Output Report, 2025; VETROPACK Annual Report, Released March 2026

Intermediate Goods and Raw Material Value

In glass equipment manufacturing costs, **refractory materials** (accounting for 25%-30% of costs) and **specialty steel** (20%) are key intermediate goods. In June 2026, Chinese refractory export prices remained stable, but European local refractory brick prices rose approximately 5% YoY driven by energy costs.

Intermediate/Material	China Production Price (2026.6)	Slovakia CIF Reference Price
Fused Cast AZS Refractory Brick	¥8,500-9,200/ton	€1,280-1,420/ton
Special Heat-Resistant Steel (310S)	¥18,500-20,000/ton	€2,600-2,850/ton
Mold Cast Iron Parts	¥6,200-7,000/ton	€950-1,100/ton

Source: Longzhong Information Refractory Weekly Report, June 2026; Shengyishe Steel Price Monitoring; carried forward, no latest public data

Trade and Macro Indicators

Slovakia's 2025 GDP growth was approximately **2.3%**, with industrial value-added accounting for 28%. The EUR/CNY exchange rate remained in the **7.85-8.05** range. China-Slovakia bilateral trade reached approximately **€9.8 billion**, making China Slovakia's third-largest trading partner outside the EU.

- GDP growth: **2.3%** (2025), 2026 forecast 2.5% (World Bank)
- EUR/CNY exchange rate: **7.92** (June 2026 average, ECB reference rate)
- China-Slovakia bilateral trade: approximately **€9.8 billion** (2025), YoY +5.1%
- EU machinery import tariff: **0%-2.7%** (depending on HS code)

Source: World Bank Global Economic Prospects, June 2026; ECB Exchange Rate Data; China Customs Bilateral Trade Statistics

Risks and Opportunity Windows

Key risks include certification barriers from the revised EU Machinery Directive, EUR exchange rate fluctuations, and geopolitical uncertainty. Opportunity windows lie in Slovakia's glass packaging capacity expansion, aging production line upgrades (approximately 40% of equipment has been in service for over 15 years), and policy dividends under the China-CEEC "17+1" cooperation mechanism.

- **Risk:** The 2026 revised EU Machinery Directive may raise entry barriers for imported equipment
- **Risk:** If EUR/CNY falls below 7.6, it will weaken the price advantage of Chinese equipment
- Opportunity VETROPACK expansion and RONA line upgrades release approximately **€22 million** in equipment procurement demand
- Opportunity China-Slovakia trade facilitation policies continue to advance under the "17+1" cooperation framework

Source: European Commission Machinery Directive Revision Notice, April 2026; Slovak Investment and Trade Development Agency (SARIO) Industry Report

Data Sources Summary

1. Eurostat — Trade Database and PPI, 2025-2026
2. General Administration of Customs of China — Import/Export Statistics, Full-Year 2025 and Q1 2026
3. Statistical Office of the Slovak Republic — Industrial Output Report and Customs Trade Statistics
4. World Bank — Global Economic Prospects, Updated June 2026
5. European Central Bank — EUR/CNY Reference Exchange Rate, June 2026
6. Longzhong Information — Refractory Weekly Report, June 2026
7. Shengyishe — Steel Price Monitoring Data, June 2026
8. China Glass Industry Association — Industry Briefing, Q1 2026
9. VETROPACK — Annual Report, Released March 2026
10. Slovak Investment and Trade Development Agency (SARIO) — Industry Report
11. European Commission — Machinery Directive Revision Notice, April 2026