Overseas Market Analysis Report

Slovakia Tissue Paper Overseas Market Analysis Report

Target Country: Slovakia | Main Category: Tissue Paper | Report Date: June 29, 2026

Slovakia Tissue Paper Core Conclusions

The Slovak tissue paper market has an annual consumption of about 100,000 tonnes, with **import dependence exceeding 65%** and limited local production capacity. In H1 2026, international pulp prices remained high and volatile, and cost pressures continued to be transmitted to end-user prices. China's tissue paper exports to Slovakia have grown steadily, but face dual challenges from stricter EU environmental regulations and euro exchange rate volatility. Overall market supply and demand are tight, ⚠ **upward price risks are intensifying**, and differentiated products and localized partnerships are key breakthrough directions.

- In 2025, apparent consumption of tissue paper in Slovakia was approx. **99,000 tonnes**
- Import dependence approx. **67%**, domestic production only about 35,000 tonnes
- European BHKP CIF price in June 2026 up ▲8.3% year-on-year

Source: Statistical Office of the Slovak Republic, Eurostat, Fastmarkets RISI, June 2026

Supply & Demand Fundamentals

Slovakia's tissue paper market features a pattern of "insufficient domestic production, filled by imports". In 2025, domestic output was about 35,000 tonnes, imports reached 72,000 tonnes, and exports were only 8,000 tonnes. Consumption is mainly concentrated in toilet paper and kitchen paper, which together account for over 75% of the total. In Q1 2026, imports grew about 5% year-on-year, reflecting demand resilience.

Indicator	2024	2025	YoY Change
Domestic Production (10,000t)	3.3	3.5	+6.1%
Imports (10,000t)	6.8	7.2	+5.9%
Exports (10,000t)	0.7	0.8	+14.3%
Apparent Consumption (10,000t)	9.4	9.9	+5.3%

Source: Statistical Office of the Slovak Republic, Eurostat, Q1 2026 report (2025 full-year figures are official statistics)

China Market Status

In June 2026, China's tissue paper parent roll price ranged between **CNY 6,800-7,200/tonne**, basically flat month-on-month. The industry operating rate remained at 65%-70%, and capacity utilization is low. China's tissue paper exports in January-May 2026 increased by about ▲12% year-on-year, with notable growth in exports to the EU, and Slovakia as a Central and Eastern European node market attracting more attention.

- Tissue parent roll price: CNY 6,800-7,200/tonne (June 2026, Zhuochuang Information)

- Industry operating rate: approx. **66%** (using previous value, June data pending update)
- Exports Jan-May 2026: approx. **480,000 tonnes**, up 12% YoY
- EU share of exports rose to about 18% (vs. 15% in same period 2025)

Source: Zhuochuang Information, General Administration of Customs of China, June/May 2026

Slovakia Market Status

Slovakia's tissue paper retail prices rose moderately in H1 2026, by about 3%-5%, mainly driven by increased import costs. Import sources are highly concentrated within the EU, with **Germany and Poland together accounting for approximately 60% of imports**. China, as a non-EU supplier, holds a share of about 8%-10%, but the growth momentum is positive, especially in value-for-money products where it has competitive advantages.

- Major import origins: Germany (35%), Poland (25%), Italy (12%), **China (8%)**, Austria (7%)
- Retail price index: up ▲4.2% YoY (May 2026)
- Per capita annual consumption: approx. **18.2 kg**, close to EU average
- E-commerce channel share rose to about 22% (vs. 19% in 2025)

Source: Statistical Office of the Slovak Republic, Eurostat trade database, May 2026

Product Segment Structure

In Slovakia's tissue paper imports, toilet paper leads with about 48% share; kitchen paper (paper towels) and facial tissue follow. The fastest-growing category of China's exports to Slovakia in 2025 was **kitchen paper (+22% YoY)**, indicating improved competitiveness of Chinese products in this segment. Import demand for premium multi-ply toilet paper is also steadily growing.

Segment	Import Share (2025)	Price Trend	China Export Growth
Toilet paper	48%	+3.8%	+9%
Kitchen paper	22%	+5.1%	+22%
Facial tissue/handkerchief	18%	+3.2%	+15%
Others (wipes, etc.)	12%	+4.5%	+18%

Source: Eurostat, General Administration of Customs of China, 2025 full-year data and Q1 2026 trends

Core Finished Product Supply & Demand

Toilet paper, the largest category in Slovakia's tissue market, saw imports of about 35,000 tonnes in 2025, local production of about 18,000 tonnes, leaving a supply-demand gap of approximately **17,000 tonnes** that needs to be imported. In Q1 2026, the average import price rose 4.6% YoY, reflecting pulp cost pass-through. Inventory levels are at 45-55 days, in the lower part of the normal range, ⚠ **indicating restocking demand in H2**.

- Toilet paper imports: approx. **35,000 tonnes** in 2025, +6.2% YoY in Q1 2026
- Local production: approx. 18,000 tonnes/year, capacity utilization about 78%

- Avg import price: approx. **€1,850/tonne** (CIF) in Q1 2026
- Channel inventory days: approx. 50 days (normal range 45-60 days)

Source: Statistical Office of the Slovak Republic, Eurostat Comext, Q1 2026

Intermediates & Raw Material Values

Pulp is the core raw material for tissue paper, accounting for about 55%-65% of production costs. In June 2026, European CIF prices for bleached hardwood kraft pulp (BHKP) stayed high at **$720-760/tonne**, and bleached softwood kraft pulp (NBSK) quoted at $880-920/tonne. Domestic pulp spot prices in China strengthened in tandem, and cost pass-through pressures continue to accumulate, leading to higher acceptance of intended CIF prices from Slovak importers for Chinese tissue paper.

Raw Material	China Spot Price	Europe CIF Price	MoM Change
BHKP	5,300 CNY/t	740 USD/t	+1.2%
NBSK	6,200 CNY/t	900 USD/t	+0.8%
Unbleached pulp	4,500 CNY/t	620 USD/t	+0.5%

Source: Fastmarkets RISI, SunSirs (生意社), Zhuochuang Information, June 2026

Trade & Macro Indicators

Slovakia's GDP grew about 2.1% in 2025, slowing to 1.8% in Q1 2026. The EUR/CNY exchange rate fluctuated in the 7.75-7.95 range, impacting the competitiveness of Chinese exports. Bilateral trade between China and Slovakia has grown steadily, and tissue paper as a consumer good benefits from the recovery of Slovak household consumption spending. EU tariff policy for Chinese tissue paper currently maintains MFN rates.

Macro Indicator	Value	Period
Slovakia GDP Growth	1.8%	Q1 2026
EUR/CNY Exchange Rate	7.85	June 2026
Household Consumption Expenditure Growth	+2.4%	Q1 2026
EU MFN Tariff (Tissue Paper)	0%-6%	Effective 2026

Source: World Bank, Statistical Office of the Slovak Republic, European Central Bank, WTO Tariff Database, June 2026

Risks & Opportunity Windows

⚠ Risks Euro exchange rate fluctuations increase profit uncertainty for Chinese exporters; the EU Carbon Border Adjustment Mechanism (CBAM) may eventually extend to paper products, adding compliance costs; the localized advantages of German and Polish suppliers are difficult to shake in the short term.

✓ Opportunities China's high-quality, cost-effective products have **significant substitution potential** in kitchen paper and facial tissue segments; rising e-commerce penetration in Slovakia benefits small and medium-sized brands; China-Slovakia bilateral relations are stable, and trade facilitation continues to advance.

- Geopolitical risk: uncertainty in EU trade policy toward China (previous assessment retained)
- Supply chain risk: pulp prices remain high, with no clear sign of easing in H2 2026

- Opportunity window: China's share in the kitchen paper segment could rise from 8% to **12%-15%**

Source: European Commission policy documents, Fastmarkets RISI, Ministry of Commerce of China, comprehensive assessment June 2026

Data Source Summary

- Statistical Office of the Slovak Republic — 2025 full-year and Q1 2026 data
- Eurostat — Comext trade database, 2025-2026
- General Administration of Customs of China — tissue paper export statistics, Jan-May 2026
- Zhuochuang Information — China tissue parent roll price and operating rate, June 2026
- Fastmarkets RISI — international pulp prices (BHKP/NBSK), June 2026
- SunSirs (生意社) — China pulp spot prices, June 2026
- World Bank / IMF — Slovakia macroeconomic data, Q1 2026
- European Central Bank — EUR/CNY exchange rate data, June 2026
- WTO Tariff Database — EU MFN tariff rates, 2026
- European Commission — CBAM-related policy documents