Slovakia Nonwoven Fabric Overseas Market Analysis Report

Target Country: Slovakia

Main Category: Nonwoven Fabric

Report Update Date: June 29, 2026

Slovakia Nonwoven Fabric Key Findings

Slovakia's nonwoven fabric market has an annual consumption of approximately **46,000 tons**, with import dependency exceeding **85%**. Automotive manufacturing and healthcare are the two pillar demand sectors, together accounting for over 60%. China, as the second-largest supply source, continues to expand its market share through cost-effectiveness advantages. Key risks include polypropylene raw material price volatility, the EU Carbon Border Adjustment Mechanism (CBAM) driving up import costs, and supply chain uncertainty due to geopolitical factors.

- Slovakia's nonwoven imports in 2025: approx. **43,000 tons**, import dependency approx. **87%**
- Automotive sector consumption share: approx. **35%**, medical hygiene materials: approx. **28%**
- China's nonwoven exports to Slovakia in 2025: approx. **9,500 tons**, YoY growth approx. ▲6.2%
- Under CBAM impact, import costs expected to rise by **3%-5%** Risk Alert

Sources: Eurostat trade data, May 2026; China Customs export statistics, April 2026; Statistical Office of the Slovak Republic annual report 2025

Supply and Demand Fundamentals

Slovakia's domestic nonwoven production capacity is limited, with annual output below 10,000 tons, primarily concentrated in technical textiles. The market exhibits a significant supply-demand gap, heavily reliant on imports from Germany, China, and Poland to meet downstream demand. Automotive industry recovery and upgrading of medical hygiene consumption are the main demand growth drivers.

Indicator	2023	2024	2025E
Domestic Output (10k tons)	0.68	0.72	0.75
Imports (10k tons)	4.05	4.20	4.30
Exports (10k tons)	0.42	0.44	0.45
Apparent Consumption (10k tons)	4.31	4.48	4.60

Sources: Eurostat trade database 2025; Statistical Office of the Slovak Republic industrial output report, March 2026; E = industry estimate

China Market Status

China is the world's largest nonwoven fabric producer, with 2025 output at approximately **12.8 million tons** and capacity utilization maintained at around **76%**. Spunbond nonwovens remain the dominant product category, and export market diversification continues to advance, with exports to the EU maintaining a growth trend. In H1 2026, raw material cost volatility narrowed, and industry operating rates rose steadily.

- China nonwoven output 2025: approx. **12.8 million tons** (YoY +4.1%)

- Spunbond nonwoven (30gsm) average price, June 2026: **15,200-16,500 CNY/ton**
- Total nonwoven exports 2025: approx. **1.45 million tons**, of which approx. 280,000 tons to the EU
- Q1 2026 industry capacity utilization: approx. **77.5%**, operating rate steady with positive outlook

Sources: CNITA 2025 annual report; 100ppi.com price monitoring, June 2026; China Customs export statistics, April 2026

Slovakia Market Status

Slovakia's nonwoven fabric market is import-driven, with domestic production covering only approximately **16%** of demand. In H1 2026, CIF prices of imported nonwovens rose slightly due to logistics costs and EUR exchange rate factors. Germany remains the largest supplier, but Chinese products continue to grow market share, performing particularly well in spunbond and spunlace categories.

- Average CIF price of nonwoven imports 2025: approx. **2,400-2,800 EUR/ton**
- Main import sources: Germany **34%**, China **22%**, Poland **16%**, Czech Republic **10%**
- Approx. **8-10** domestic producers, mostly small-to-medium technical textile factories
- Q1 2026 import volume YoY: ▲3.8%

Sources: Statistical Office of the Slovak Republic foreign trade data, March 2026; Eurostat Comext database, May 2026

Product Segment Structure

Slovakia's nonwoven imports are dominated by **spunbond nonwovens** and **spunlace nonwovens**, accounting for approximately 45% and 22% of total imports, respectively. Meltblown nonwoven share has declined due to reduced mask demand, but automotive filtration-grade meltblown demand remains stable. Needle-punched nonwovens are seeing notable growth in geotextile and construction applications.

Sub-category	Import Share	CIF Reference (€/t)	Demand Trend
Spunbond Nonwoven	45%	2,200-2,600	Steady growth
Spunlace Nonwoven	22%	2,800-3,500	Rapid growth
Meltblown Nonwoven	8%	3,800-4,800	Stable
Needle-punched Nonwoven	15%	2,000-2,500	Moderate growth

Sources: Eurostat HS code classified trade data 2025; industry report composite estimate, Q1 2026

Core Product Supply and Demand

Automotive nonwovens and medical hygiene materials are the two core downstream product demand areas in Slovakia. Slovakia produces approximately **1.08 million vehicles** per year (2025), with nonwoven usage of approximately 15-20 m² per vehicle, generating annual demand of about **18,000 tons**. Medical hygiene demand benefits from the aging trend and upgraded infection control standards, with annual consumption of approximately **13,000 tons**.

- Automotive nonwoven annual demand: approx. **18,000 tons** (OEM + components), supply gap approx. **16,000 tons**
- Medical hygiene annual consumption: approx. **13,000 tons**, with surgical drapes and protective apparel comprising the largest share
- Construction/geotextile nonwovens: annual demand approx. **7,000 tons**, driven by infrastructure investment
- Domestic supply gap: combined shortfall across three sectors exceeds **35,000 tons**, dependent on imports

Sources: ZAP SR (Automotive Industry Association Slovakia) 2025 annual report; Slovak Ministry of Health medical consumables procurement statistics 2025; EDANA European nonwovens market report 2025

Intermediate Goods and Raw Materials Value

Core raw materials for nonwovens are **polypropylene (PP)** and **polyester staple fiber**, together accounting for 60%-70% of production costs. In June 2026, China PP raffia-grade prices remained stable, while European PP prices stayed elevated due to energy costs. The widening China-Europe price spread favors the competitiveness of Chinese nonwoven exports.

Raw Material	China Spot Price	Europe Reference	Spread Trend
PP (Raffia grade)	7,800-8,200 CNY/t	1,150-1,250 €/t	Widening
Polyester Staple (1.4D)	7,200-7,500 CNY/t	1,050-1,120 €/t	Stable
Viscose Fiber	12,800-13,500 CNY/t	1,750-1,900 €/t	Slight fluctuation

Sources: 100ppi.com chemical raw material price monitoring, June 2026; Argus Media European polymer price report, June 2026; Longzhong Information PP market weekly, June 2026

Trade and Macro Indicators

As a Eurozone member, Slovakia maintains stable macroeconomic growth. GDP growth rate in 2025 was approximately **2.3%**, with automotive and manufacturing as pillar industries. Bilateral trade between China and Slovakia continues to expand, and nonwoven fabrics, as intermediate goods, benefit from the stable trade environment and the EU's zero-tariff policy.

Indicator	Value	Period
Slovakia GDP	Approx. €132 billion	2025
GDP Growth Rate	2.3%	2025
EUR/CNY Exchange Rate	Approx. 7.85	June 2026
China-Slovakia Nonwoven Trade Value	Approx. €21 million	2025

Sources: World Bank Slovakia economic data update, April 2026; National Bank of Slovakia exchange rate report, June 2026; China Customs export statistics 2026

Risks and Opportunity Windows

Key risks include the potential extension of the **EU Carbon Border Adjustment Mechanism (CBAM)** to textiles, polypropylene raw material price volatility, and geopolitical tensions in Central and Eastern Europe. Opportunity windows lie in growing demand for localization in Slovakia, policy support for biodegradable nonwovens, and trade facilitation under the China-CEEC cooperation mechanism. The automotive lightweighting trend also creates new demand for high-value-added nonwoven products.

- ⚠ **CBAM Extension Risk**: If nonwovens are covered, import costs may rise 3%-5%
- ▲ Localization Opportunity: Slovak government encourages manufacturing reshoring, with tax incentives for local plant establishment
- ▲ Biodegradable Substitution: EU SUP Directive drives PLA-based nonwoven demand, annual growth rate exceeding 15%
- Exchange rate window: EUR/CNY rate relatively stable, favorable for Chinese export pricing

Sources: European Commission CBAM implementation progress report, May 2026; SARIO investment promotion policy 2026; EDANA sustainability report 2025

Data Sources Summary

Eurostat — Comext trade database, 2025-2026

General Administration of Customs of China (GACC) — Nonwoven export statistics, April 2026

China Nonwovens & Industrial Textiles Association (CNITA) — 2025 annual industry report

100ppi.com — Chemical raw material and nonwoven price monitoring, June 2026

Statistical Office of the Slovak Republic — Foreign trade data and industrial output reports, 2025-2026

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EDANA (European Disposables and Nonwovens Association) — 2025 market report and sustainability report

Argus Media — European polymer price report, June 2026

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