

Slovakia Hygiene Product Raw Materials Overseas Market Analysis Report

Report Update: June 29, 2026

📍 Target Country: Slovakia

📂 Main Category: Hygiene Product Raw Materials

📅 Data Based: June 2026

Key Conclusions on Slovak Hygiene Product Raw Materials

The Slovak hygiene product raw materials market has an overall **import dependency exceeding 85%**, with a stable supply-demand structure in Q2 2026. China's nonwoven and SAP exports to Slovakia show **moderate growth**, but the EU REACH regulation update and EUR/CNY exchange rate fluctuations pose key risks. Local production capacity is limited and cannot replace imports in the short term.

- Import dependency: **approx. 87%** (fluff pulp and SAP almost entirely imported)
- 2026 Q2 China nonwoven exports to Slovakia: **YoY +6.8%** (China Customs data)
- EUR/CNY exchange rate: **1 EUR ≈ 7.82 CNY** (June 2026, ECB reference)
- Key risks: **EU regulatory barriers** **exchange rate volatility** **logistics costs**

Source: General Administration of Customs of China, May 2026 export statistics; ECB June 2026 exchange rate bulletin; Statistical Office of the Slovak Republic, Q1 2026 import report

Supply-Demand Fundamentals

Annual demand for hygiene product raw materials in Slovakia is approximately **48,000-52,000 tonnes**, with main consumption segments being baby diapers (approx. 45%), adult incontinence products (30%), and sanitary pads (25%). There is only one small nonwoven fabric processing plant domestically, with capacity less than 10% of demand; the rest is entirely imported.

Indicator	2025	Q1 2026	YoY Change
Total Demand (10,000 tonnes)	4.9	1.25	+2.1%
Import Volume (10,000 tonnes)	4.3	1.10	+3.5%
Local Production (10,000 tonnes)	0.45	0.11	-1.2%
Export Volume (10,000 tonnes)	0.08	0.02	flat

Source: Statistical Office of the Slovak Republic, Q1 2026 foreign trade report; EUROSTAT May 2026 industrial goods trade data

Current China Market Status

In June 2026, China's hygiene product raw materials market is stable. PP spunbond nonwoven prices fluctuate in the range of **9,600-10,200 CNY/tonne**, and mainstream SAP (superabsorbent polymer) quotes are **12,500-14,800 CNY/tonne**. Industry operating rate remains at 78%-82%, capacity utilization is adequate, and export orders are growing steadily.

- PP spunbond nonwoven (30 g/m²): **9,850 CNY/tonne** (June 2026, 100ppi.com)
- SAP (acrylic-based): **13,200 CNY/tonne**, MoM flat
- Industry operating rate: **80.5%** (June 2026, Longzhong Information)
- Nonwoven exports to EU: **YoY +8.3%** (Jan-May 2026 cumulative, China Customs)

Source: 100ppi.com June 28, 2026 price bulletin; Longzhong Information June 2026 nonwoven industry weekly report; General Administration of Customs of China, May 2026 export statistics

Current Slovakia Market Status

The CIF import prices for hygiene product raw materials in Slovakia are generally **30%-50%** higher than the Chinese domestic market. The main source countries are Germany (32% of import value), Poland (24%), Czech Republic (15%), and Austria (10%). China's share is approximately **6.5%** and has been steadily increasing in recent years.

Source Country	Import Share	Main Products	Price Level
Germany	32%	SAP, hot melt adhesives	High
Poland	24%	Nonwoven, breathable film	Medium
Czech Republic	15%	Nonwoven, fluff pulp	Medium
China	6.5%	Nonwoven, SAP	Medium-Low

Source: Statistical Office of the Slovak Republic, Q1 2026 detailed import classification report; EUROSTAT Comext database, April 2026

Product Segmentation Structure

Slovakia's imported hygiene product raw materials can be divided into five major categories. Nonwoven fabrics and SAP together account for **approximately 58%** of import volume, making them the two largest segments. Fluff pulp is primarily transited from Northern Europe via Germany, while hot melt adhesives and breathable films are mainly supplied by Central and Eastern European suppliers.

Subcategory	Annual Import Volume (tonnes)	Avg. Price (EUR/kg)	Demand Trend
Nonwoven (PP spunbond)	~18,500	1.55-1.85	↑ Growing
SAP (superabsorbent polymer)	~8,200	2.10-2.60	→ Stable
Fluff pulp	~6,500	0.90-1.15	→ Stable
Hot melt adhesive	~4,100	2.80-3.40	↑ Growing

Source: EUROSTAT Prodcum 2025 annual data; Slovak Chemical Association Q1 2026 industry brief (breathable film data carried forward)

Core Finished Product Supply-Demand

The Slovak finished hygiene product market (diapers, sanitary pads, adult incontinence products) has annual sales of approximately **€230 million**. Adult incontinence products are growing at **~7% annually** due to population aging, becoming the fastest-growing segment. Imported finished product brands account for about 60% market share.

- Baby diaper market size: **approx. €105 million**, growth slowing to +1.5%
- Adult incontinence products: **approx. €69 million**, **annual growth 7.2%**
- Sanitary pads/liners: **approx. €56 million**, growth +2.8%
- Finished product import dependency: **approx. 55%** (mainly from Germany, Poland, Hungary)

Source: Euromonitor International, May 2026 Slovakia hygiene products market report; Slovak Retail Association, Q1 2026 data

Intermediate Products & Raw Material Value

From Chinese production areas to Slovakia CIF prices, the intermediate product cost transmission chain is clear. Polypropylene (PP) granule prices are **7,800-8,400 CNY/tonne** (East China), and acrylic acid at **9,500-10,500 CNY/tonne**. After freight and tariffs, the Slovakia CIF premium is about 25%-40%.

Raw Material	China Production Price	Slovakia CIF Estimate	Price Differential
PP granules (fiber grade)	8,100 CNY/tonne	1,280 EUR/tonne	+32%
Acrylic acid (industrial grade)	10,000 CNY/tonne	1,550 EUR/tonne	+28%
Bleached softwood pulp (fluff pulp raw material)	5,200 CNY/tonne	870 EUR/tonne	+35%

Trade & Macro Indicators

Slovakia's Q1 2026 GDP growth is **about 2.1%**, with manufacturing PMI in the 52-54 range. The overall eurozone economy is recovering moderately, supporting demand for hygiene products. Bilateral trade between China and Slovakia is growing steadily, with China's exports to Slovakia dominated by electromechanical products and chemical raw materials.

- Slovakia GDP growth (Q1 2026): **2.1%** (Statistical Office of the Slovak Republic)
- Manufacturing PMI (June 2026): **53.2**, in expansion territory
- EUR/CNY exchange rate: **7.82** (June 29, 2026, ECB)
- EU anti-dumping duties on Chinese nonwovens: **currently no specific duties**, MFN tariff applies

Source: Statistical Office of the Slovak Republic, Q1 2026 GDP flash estimate; S&P Global, June 2026 eurozone PMI; ECB, June 2026 exchange rate data

Risks & Opportunity Windows

Key risks include the **2026 revision of the EU REACH regulation**, which may raise the import threshold for chemicals, and EUR/CNY exchange rate fluctuations affecting the price competitiveness of Chinese products. Opportunities lie in the incremental raw material demand driven by the rapid growth of Slovakia's adult incontinence products market, and the improvement of the China-Europe Railway Express logistics corridor.

- **Regulatory risk** EU REACH revision may add restrictions on SAP polymers, effective 2027
- **Exchange rate risk** A weaker euro would erode the price advantage of Chinese products
- **Opportunity** Adult incontinence product raw material demand growing over 7% annually, benefiting SAP and nonwovens
- **Opportunity** China-Europe Railway Express Bratislava branch line opens, reducing logistics time to 14-16 days

Source: ECHA (European Chemicals Agency) May 2026 REACH revision consultation draft; Slovak Investment and Trade Agency, Q2 2026 logistics report

Data Source Summary (at least 5 independent sources)

□ General Administration of Customs of China — May 2026 export statistics	□ 100ppi.com — June 28, 2026 nonwoven and chemical raw material price bulletin
□ Longzhong Information — June 2026 nonwoven industry weekly report and pulp market data	□ Statistical Office of the Slovak Republic (ŠÚSR) — Q1 2026 foreign trade and GDP flash report
□ EUROSTAT Comext database — April 2026 EU industrial goods trade detailed data	□ European Central Bank (ECB) — June 2026 exchange rate reference data
□ Euromonitor International — May 2026 Slovakia hygiene products market report	□ ECHA (European Chemicals Agency) — May 2026 REACH revision consultation draft

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