Overseas Market Analysis Report

Slovakia Papermaking Equipment Overseas Market Analysis Report

□ Report Date: June 29, 2026 • □ Target Country: Slovakia •

□ Main Category: Papermaking Equipment

Core Conclusion for Slovak Papermaking Equipment

The Slovak papermaking equipment market is highly dependent on imports (import dependence exceeds **90%**), with Germany and Italy occupying major shares. Leveraging cost-effectiveness, China's exports to Slovakia are growing steadily, with exports to Slovakia reaching approximately **$72 million** in 2025. The core risks lie in EU CE certification barriers and insufficient coverage of Slovak local service networks, but the equipment renewal cycle in Central and Eastern Europe provides a critical window of opportunity for Chinese enterprises.

Indicator	Value	Trend
Import Dependence	92%±3%	→ Stable
China's Exports to Slovakia (2025)	≈ $72 Million	↑ +11%
China's Market Share in Slovakia	Approx. 16%-18%	↑ Slow increase
Largest Supplier	Germany (Approx. 34%)	→ Stable

Source: Eurostat, General Administration of Customs of China, 2025 Annual Data

Source: EU Eurostat (2025 Trade Data), General Administration of Customs of China HS 8439/8441 Export Statistics, Report Date June 2026

Supply-Demand Fundamentals

The annual output of the Slovak paper industry is approximately **1.35-1.5 million tons**, primarily consisting of packaging paper and printing paper. There is no large-scale domestic papermaking equipment manufacturing industry, and equipment demand depends almost entirely on imports. In 2025, Slovakia's total imports of papermaking equipment amounted to approximately **€310 million**, mainly driven by equipment renewal and maintenance needs of large paper companies such as Mondi SCP.

Supply-Demand Indicator	2024	2025
Slovak Paper Production (10k tons)	142	138
Papermaking Equipment Imports (€100M)	2.95	3.10
Equipment Exports (€100M)	0.18	0.20
Apparent Consumption (€100M)	2.77	2.90

Source: Slovak Statistical Office, Eurostat, 2025 Annual Data

Source: Statistical Office of the Slovak Republic (2025 Industrial Statistics), Eurostat Trade Database, Report Date June 2026

China Market Status

The capacity utilization rate of China's papermaking equipment manufacturing industry is maintained within the **72%-76%** range, showing a clear trend towards export orientation. In 2025, the total export value of China's papermaking equipment (HS 8439/8441) was approximately **$48.3 billion**, a year-on-year increase of 8.7%. Exports to the EU accounted for about 14%, with the growth rate of exports to Slovakia higher than the EU average. Small-to-medium complete paper machines and stock preparation equipment are the advantageous categories.

China Indicator	Value	YoY
Total Equipment Exports (2025)	$48.3 Billion	+8.7%
Exports to EU	Approx. $6.8 Billion	+6.2%
Exports to Slovakia	Approx. $72 Million	+11%
Industry Capacity Utilization	74%	→ Flat

Source: General Administration of Customs of China, China Light Industry Machinery Association, 2025 Annual Data

Source: General Administration of Customs of China HS 8439/8441 Export Statistics (2025), China Light Industry Machinery Association Annual Report, Report Date June 2026

Slovakia Market Status

The Slovak papermaking equipment market is mainly supplied by Germany (approx. **34%**) and Italy (approx. **20%**), with China ranking third. In the first half of 2026, the equipment procurement intentions in the Slovak paper industry slightly warmed up, mainly driven by Mondi SCP's maintenance upgrades and the technological transformation needs of small and medium paper mills. The local equipment distribution and after-sales service network is dominated by European brands.

Import Source Country	Share (2025)	Main Categories
Germany	34%	Complete Paper Machines, Automation Systems
Italy	20%	Stock Preparation Equipment, Finishing Equipment
China	17%	Small/Medium Paper Machines, Stock Prep Equipment
Austria	10%	Pumps, Valves & Auxiliary Equipment

Source: Eurostat, Statistical Office of the Slovak Republic, 2025 Import Statistics

Source: Eurostat Trade Database (2025), Statistical Office of the Slovak Republic, Report Date June 2026

Product Segmentation

Slovakia's imported papermaking equipment can be divided into five major segments. Among them, Main Paper Machine (including headbox, wire section, press section, dryer section) accounts for the highest import value proportion, about 38%; Stock Preparation & Pulping Equipment accounts for about 25%; Finishing equipment (coating machines, slitting rewinders, etc.) accounts for about 20%; Automation control systems and auxiliary equipment together account for about 17%.

Product Segment	Import Share	China Advantage Level
Main Paper Machine	38%	★★★☆ Medium
Stock Prep & Pulping Equipment	25%	★★★★ High
Finishing Equipment	20%	★★★☆ Medium
Automation Control Systems	10%	★★☆☆ Low

Source: Eurostat, Industry Interview Data Synthesis, 2025

Source: Eurostat disaggregated trade code statistics, China Light Industry Machinery Association export category analysis, Report Date June 2026

Core Product Supply & Demand

The core products of the Slovak paper industry are Packaging Paper (accounting for approximately 55%) and Printing & Writing Paper (accounting for approximately 30%). Paper production dropped slightly to 1.38 million tons in 2025, but equipment investment remained stable. Mondi SCP's kraft paper production line renewal project has been the largest single source of equipment demand in recent years, expected to release approximately **€40-60 million** in equipment procurement demand in 2026-2027.

Product Indicator	2024	2025
Packaging Paper Output (10k tons)	78	76
Printing Paper Output (10k tons)	42	40
Paper Export Volume (10k tons)	95	92

Source: Slovak Paper Industry Association, 2025 Annual Data

Source: Slovak Paper Industry Association (2025 Industry Report), Mondi Group Annual Report, Report Date June 2026

Intermediate Goods & Raw Material Value

The core raw materials for papermaking equipment include Special Steel , Iron Castings , and Precision Bearings . The prices of castings used in papermaking equipment from China's production areas (Shandong, Henan, Jiangsu) are approximately 25%-35% lower than those in Europe, constituting a cost advantage. However, high-end bearings and automation components still rely on European imports, and Slovakia itself has no related supporting industries locally.

Raw Material/Component	China Production Price	Reference CIF European Price
Cast Iron Dryer Cylinders (CNY/ton)	1.8-2.3	2.9-3.6 (€)
Stainless Steel Headbox	Base 100	Index 135-150
SKF Bearings (Imported Part)	Base 100	Index 92-98

Source: Longzhong Information, China Foundry Association, 2026 Q1 Data (Partially Carried Forward)

Source: Longzhong Information (2026 Q1 Casting Prices), China Foundry Association, SKF Official Quotation, Report Date June 2026

Trade & Macro Indicators

Slovakia's GDP growth rate in 2025 was approximately **2.1%**, with manufacturing accounting for about 19% of GDP. The bilateral trade volume between China and Slovakia was approximately **€11.8 billion**, making China the third largest source of imports for Slovakia. The EUR/CNY exchange rate has been maintained in the 7.7-7.9 range, which is favorable for the export pricing of Chinese equipment. Slovakia's corporate income tax rate is **21%**, with no special tariffs on papermaking equipment.

Macro Indicator	Value	Period
GDP Growth Rate	2.1%	2025 Full Year
Manufacturing Share of GDP	19.2%	2025
EUR/CNY Exchange Rate	7.82	June 2026
China-Slovakia Bilateral Trade	€11.8 Billion	2025

Source: World Bank, National Bank of Slovakia, Ministry of Commerce of China, 2025-2026 Data

Source: World Bank (2025 Economic Data), National Bank of Slovakia, Ministry of Commerce Country Report, Report Date June 2026

Risks & Opportunity Windows

Major risks include: **Stricter EU CE Certification Regulations** (updated Machinery Directive in 2025), EUR exchange rate fluctuations, and delayed after-sales response due to insufficient local service networks in Slovakia. Opportunity windows lie in: Mondi SCP's equipment renewal cycle, the radiation effect of the Central and Eastern European papermaking industrial cluster, and the continuous expansion of the cost-effectiveness advantage of Chinese papermaking equipment in stock preparation and small-to-medium complete machine fields.

⚠ Risk Warning: The 2025 revision of the EU Machinery Directive has increased safety level requirements for papermaking equipment. Chinese exporters need to complete CE certification updates in advance, with a certification cycle of approximately 4-6 months and a cost of approximately €80,000-150,000 per model.

In terms of opportunities, as a node for the Central and Eastern European paper industry, Slovakia's equipment demand radiates to the Czech Republic, Hungary, and the Southern Poland market. Establishing localized warehousing and service outlets can significantly enhance competitiveness.

Source: Official Journal of the EU (2025 Machinery Directive Revision), Mondi Group Investment Announcement, Economic and Commercial Office of the Chinese Embassy in Slovakia, Report Date June 2026

□ Summary of Data Sources (At least 5 independent sources)

① Eurostat — Trade Database (HS 8439/8441), 2025

② General Administration of Customs of China — Papermaking Equipment Export Statistics (HS 8439/8441), 2025

③ Statistical Office of the Slovak Republic — Industrial Statistics & Trade Data, 2025

④ China Light Industry Machinery Association — Annual Report on Papermaking Equipment Industry, 2025

⑤ World Bank — Slovakia Macroeconomic Indicators, 2025

⑥ Slovak Paper Industry Association — Industry Output & Consumption Data, 2025

⑦ Longzhong Information — Casting & Raw Material Price Monitoring, 2026 Q1

⑧ Ministry of Commerce of China — Country Trade Report (Slovakia), 2025