



Chemical Industry in Slovakia

DÁŠA ŠULEKOVÁ

ZVÄZ CHEMICKÉHO A FARMACEUTICKÉHO PRIEMYSLU SR

23.9.2026 Cirkulární řešení plastů a bioplastů
KRALUPY NAD VLTAVOU



Zväz chemického a farmaceutického priemyslu na Slovensku (ZCHFP SR)

Association of Chemical and Pharmaceutical Industry of the Slovak Republic

- Founded in 1991 as a voluntary association of manufacturing, commercial, research and other organizations operating in the oil processing, chemical, pharmaceutical, rubber and plastics industries.
- A full member of the Association of Employers' Associations and Unions of the Slovak Republic (AZZZ SR), the Tripartite Council – the Economic and Social Council of the Slovak Republic (HSR SR), the European Chemical Industry Council (CEFIC), the European Chemical Employers' Group (ECEG), and the Slovak Centre for Digital Innovation (SCDI), which it co-founded.
- Participates in the development and implementation of legislation in the Slovak Republic, as well as in shaping EU legislation and the decision-making of EU institutions, with the aim of creating the most favourable possible business environment for its members
- Cooperation with universities, R & D, support for talented students, student Olympiads, and teacher seminars



Members and Activities

- 66 member organizations, including 61 individual members and 5 collective members.
- 14 working groups involving approximately 130 experts.
- More than 30 webinars/seminars have been held, focusing on chemical and environmental legislation, PFAS, Responsible Care, and occupational health and safety





Long-standing Cooperation with the Association of Chemical Industry of the Czech Republic

Key areas of cooperation:

- Chemical legislation
- Cooperation on BAT/BREF
- Preparation for the digitalisation of processes

Strategic Importance

Close cooperation with the Czech chemical industry supports the exchange of expertise, regulatory experience and common positions on issues affecting the chemical sector in Central Europe.





The Chemical Industry in Slovakia

Key facts

- A strategically important part of Slovak industry
- Strong links to the European chemical value chain
- Key areas: oil processing, chemicals, pharmaceuticals, rubber and plastics
- Revenue in 2025: **EUR 12.960 billion** (10.9% of total industrial revenue in Slovakia)
- Number of employees: **37,481** (10% of total industrial employment in Slovakia)



Key Statistical Indicators of the Chemical and Pharmaceutical Industry (CHaPI), 2024 and 2025

Source: Statistical Office of the Slovak Republic

Indicator	2024	2025	Index (%)
Revenue at current prices (EUR million)	12,834	12,960	101.0
Revenue at constant prices (EUR million)	11,393	12,021	105.5
Imports (EUR million)	14,227	14,874	104.5
Exports (EUR million)	10,822	10,929	101.0
Number of employees	37,795	37,481	99.2
Average monthly wage (EUR)	2,128	2,221	104.4
Value added (EUR million)	2,549	2,814	110.4



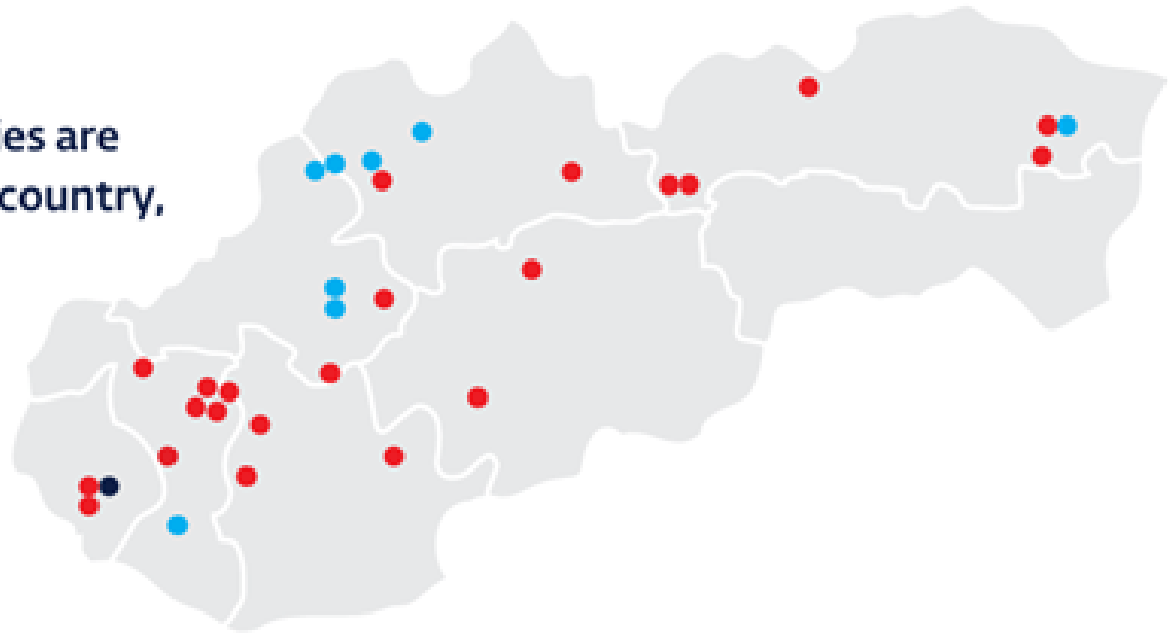
Chemical Industry in Slovakia map

Source: SARIO

The Biggest Players of the Slovak Chemical Industry (based on revenues)

The biggest chemical companies are present in every region of our country, with a higher concentration in the Western Slovakia.

- Coke & refined petroleum
- Rubber & plastic products
- Chemicals & chemical products





The Chemical Industry in Slovakia

According to data from the Statistical Office of the Slovak Republic, 255 companies with 20 or more employees operated in the sector in 2025. This represents a year-on-year decrease of 5% (13 fewer companies). This trend indicates a gradual weakening of the business environment.

The labour market is increasingly affected by a shortage of qualified workers, low interest in technical fields of study, and an ageing workforce. Employment in the sector decreased by approximately 1% year-on-year. The chemical and pharmaceutical industries currently employ 37,481 people, representing approximately 10% of total industrial employment in the Slovak Republic.

The average monthly wage reached EUR 2,221, representing a year-on-year increase of 4%. Refining has consistently maintained the highest wage levels, while the pharmaceutical industry recorded the most dynamic growth (+8%). Despite this, value added in the sector decreased by 13%, pointing to a significant mismatch between wage growth and the sector's actual performance.

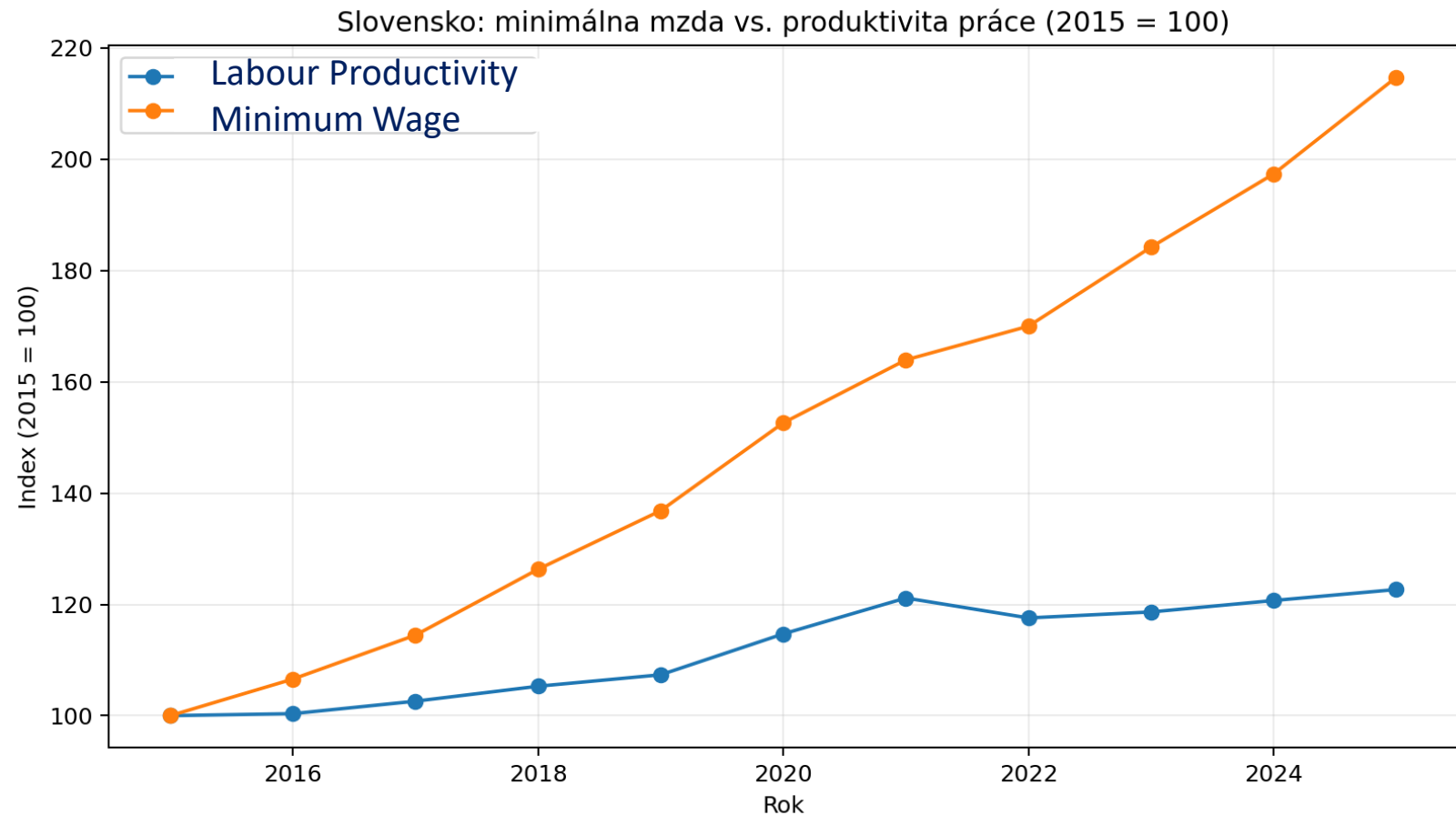
The increase in labour costs has not been accompanied by a corresponding increase in productivity and overall performance. This imbalance is increasing pressure on the economic sustainability of companies and is primarily associated with high energy prices, rising wages, and weak revenue growth.



Slovakia: Minimum Wage vs Labour Productivity

Minimum wage growth: From EUR 646 in 2022, the minimum wage increased to EUR 816 in 2025 and EUR 915 in 2026.

In 2027, it will reach EUR 972.





Foreign Trade of the Slovak Chemical and Pharmaceutical Industry

The **European Union is by far the dominant trading territory** for Slovakia's chemical industry.

Next Table provides an overview of foreign trade according to the direction of trade with **EU-27 countries and non-EU-27 countries**.

Next table illustrates the **strongly dominant integration of Slovakia's chemical and pharmaceutical industry into foreign trade with EU-27 countries**.

In 2025, **81.3% of imports** into Slovakia originated from EU-27 countries, while the remaining **18.7%** came from countries outside the European Union.

On the export side, **83.4% of exports** were destined for EU-27 countries in 2025, while the remaining **16.6%** went to countries outside the European Union.



Exports, Imports and Foreign Trade Balance within the EU-27 and with Non-EU Countries

Source: Statistical Office of the Slovak Republic (ŠÚ SR)

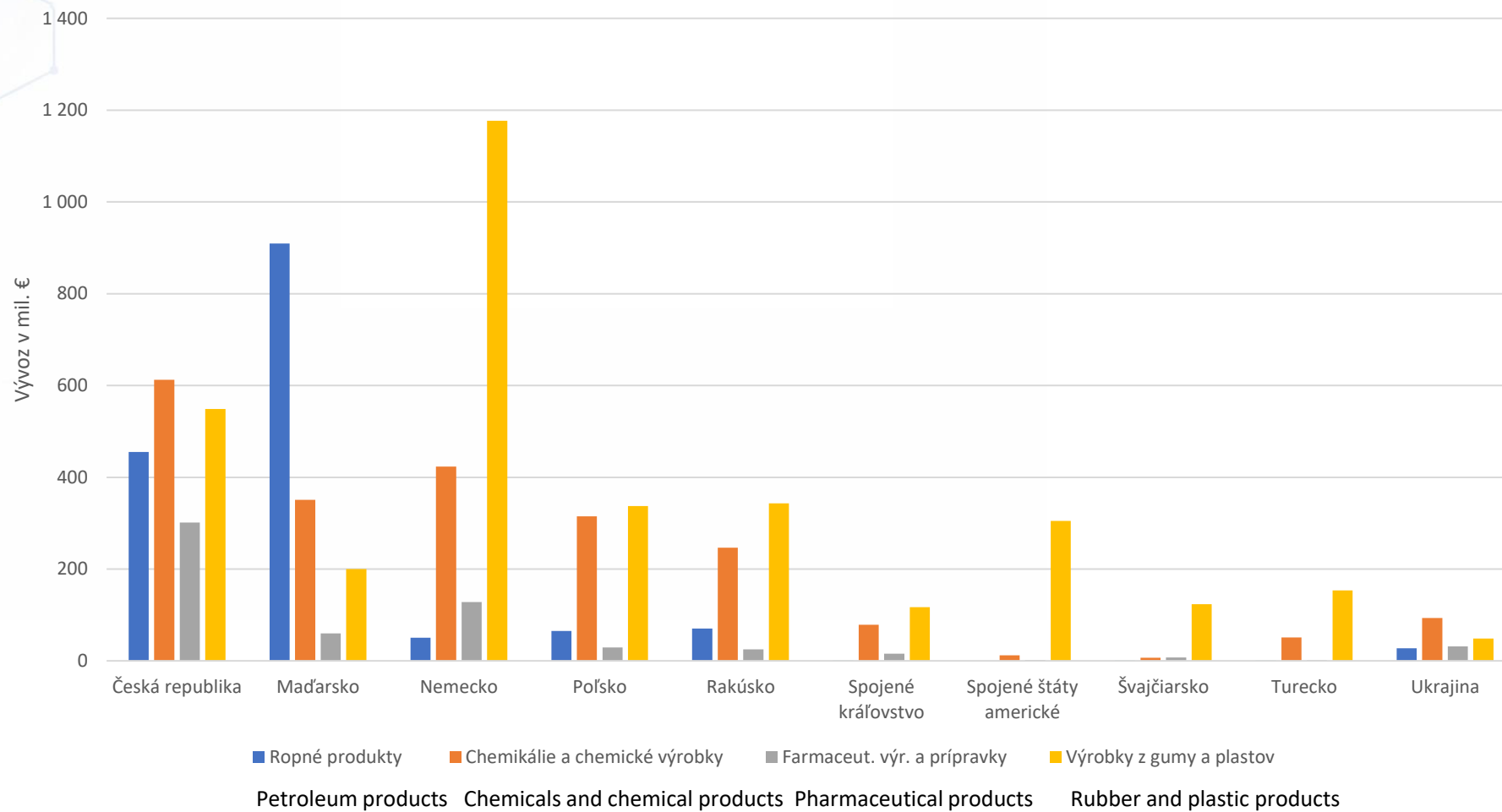
All figures in EUR million.

Territory / Sector	EU-27 Exports	EU-27 Imports	EU-27 Balance	Non-EU Exports	Non-EU Imports	Non-EU Balance
Petroleum products	1,621	1,300	+320	89	25	+64
Chemicals and chemical products	2,793	4,711	−1,918	494	1,078	−584
Pharmaceutical products and preparations	776	2,243	−1,467	100	784	−684
Rubber and plastic products	3,925	3,833	+92	1,130	899	+231
CHaPI – Total	9,115	12,087	−2,973	1,814	2,786	−972



Exports to Slovakia's Most Significant Trading Partners in 2025 (EUR million)

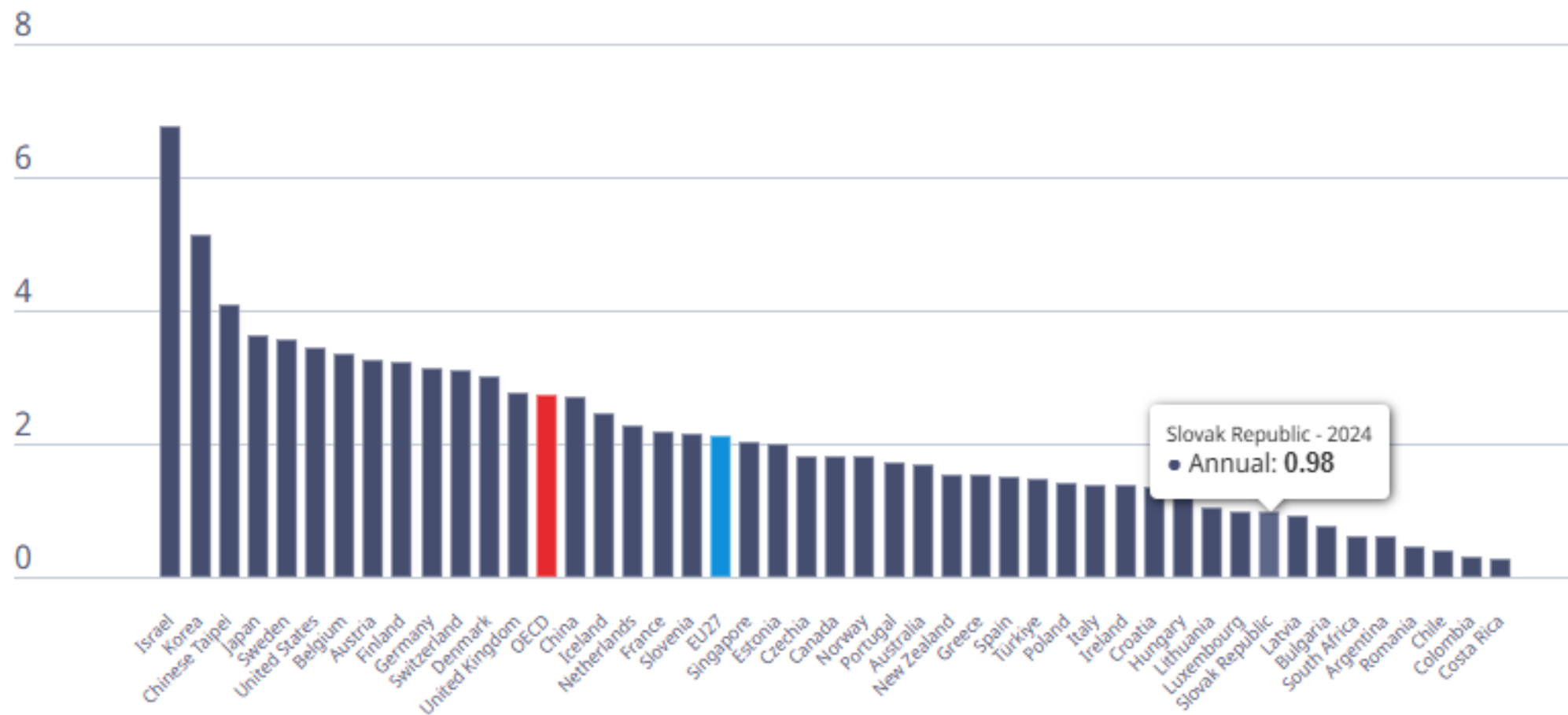
Source: Statistical Office of the Slovak Republic (ŠÚ SR)





Gross domestic expenditures on R&D as a percentage of GDP

%, 2024 or latest year available



Source: OECD, Main Science and Technology Indicators (MSTI) Database, March 2026, <https://oe.cd/msti>



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Slovenskej republiky



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