

KEY MARKET FIGURES

Q3 2021



MARKET OVERVIEW

INVESTMENT



Retail parks and logistics premises are expected to keep generating the majority of investor interest. Other segments with emerging popularity involve rented residential, such as build-to-rent and co-living projects, currently limited across the country.

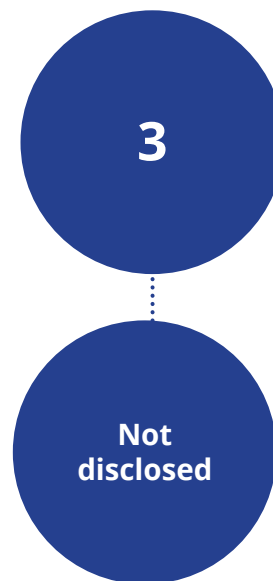


Ignacio Gomez

Associate | Capital Markets

Source: Colliers, 2021; Real Capital Analytics, 2021.

INVESTMENT VOLUMES



INVESTMENT TRANSACTIONS

TOTAL INVESTMENT VOLUMES

PRIME (NET INITIAL) YIELDS



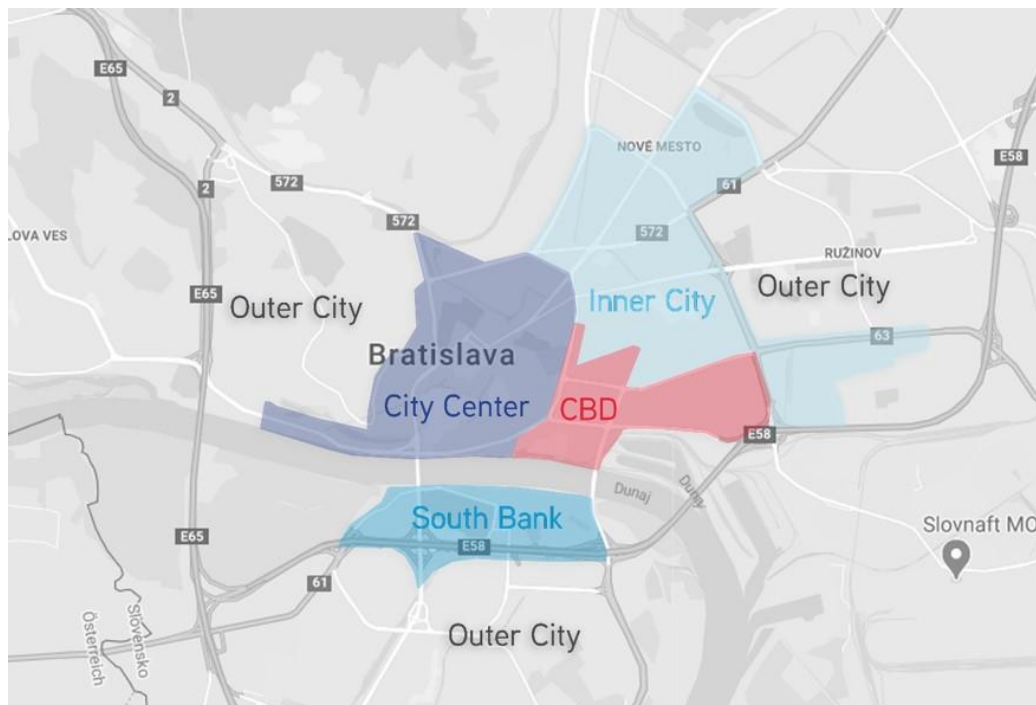
SLOVAKIA I&L

BRATISLAVA CBD OFFICE

BRATISLAVA TSC

MARKET OVERVIEW OFFICES

	Stock (sqm)	Vacancy rate (%)	Average rent (€/sqm/month)
City Centre	491,491	6.57%	€12-16
CBD	620,553	15.46%	€13-15
Inner City	286,064	10.21%	€11-13
South Bank	162,394	16.71%	€12-15
Outer City	414,939	13.64%	€9-11.5



Most of the players continue to pursue 'wait-and-see' position. Subleasing activity is seen to increase with a few players still looking for opportunities to reduce the occupied space.

Michal Hosko

Director Occupier Services | Office Agency





Source: Colliers, 2021.

MARKET OVERVIEW INDUSTRIAL



Taking into account very low vacancy in the neighbourhood CEE countries and limited I&L plots available in Bratislava, alternative locations in the Western part of the country, such as Triblavina, gain increasingly more attention from perspective investors.

Tomas Horvath
Director | Industrial Agency





FOR MORE INFORMATION



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