

# KEY MARKET FIGURES

## Q1 2022



# MARKET OVERVIEW

## INVESTMENT



*Logistics and retail parks continue to attract significant investor interest. The same is true for the residential developments in both Bratislava and the regional capitals. Projects in the early stages of development enabling to secure assets upon completion become more attractive.*



**Ignacio Gomez**

Associate | Capital Markets

Source: Colliers, 2022; Real Capital Analytics, 2022.

\*Excluding confidential and pending transactions

### INVESTMENT VOLUMES



INVESTMENT TRANSACTIONS

TOTAL INVESTMENT VOLUMES\*

### PRIME (NET INITIAL) YIELDS



SLOVAKIA I&L

BRATISLAVA CBD OFFICE

BRATISLAVA TSC

# MARKET OVERVIEW OFFICES



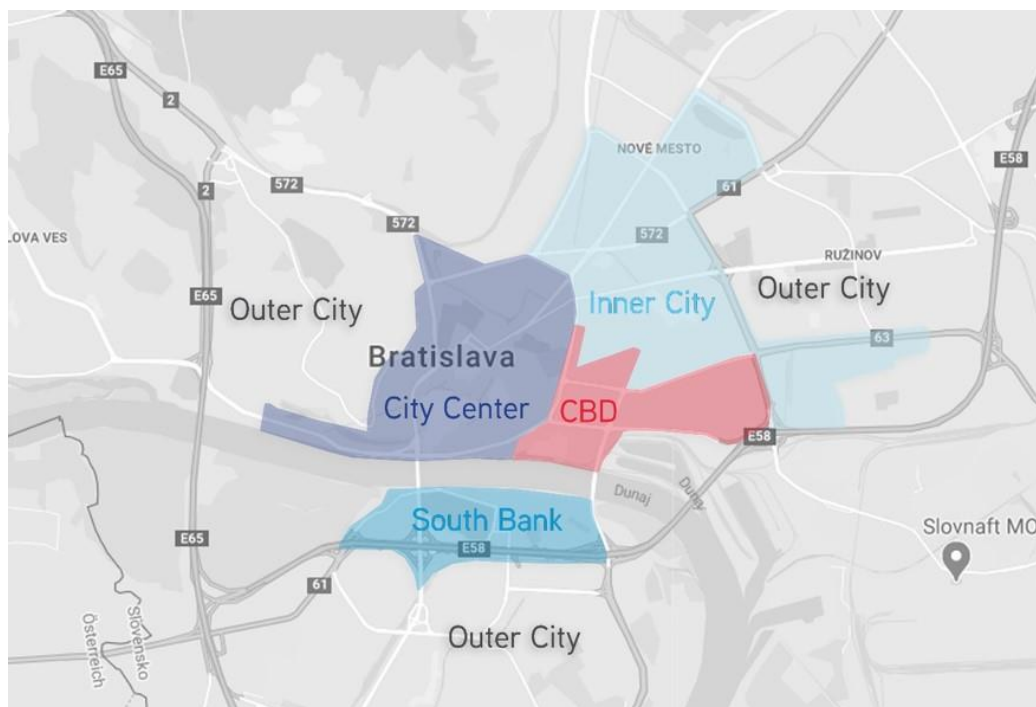
*In line with the whole real estate industry, Bratislava's office market is greatly impacted by continuously rising construction costs. Landlords aim to have longer leases of 72-84 month (compared to the previous average of around 60 months) to accommodate for higher incentives and depreciation costs.*

Michal Hosko

Director Occupier Services | Office Agency



	Stock (sqm)	Vacancy rate (%)	Average rent (€/sqm/month)
City Centre	493,691	7.07%	€12-16
<b>CBD</b>	<b>620,553</b>	<b>13.86%</b>	<b>€13-15</b>
Inner City	313,090	9.50%	€11-13
South Bank	162,394	15.91%	€12-15
Outer City	415,640	14.63%	€9-11.5





Source: Colliers, 2022.

# MARKET OVERVIEW INDUSTRIAL



*As inflation spikes and construction materials become missing/more difficult to source, future lease agreements, which were previously conducted for 2-3 month, are now shortened to 2-3 weeks, reflecting the maximum time suppliers are able to hold prices.*

**Tomas Horvath**  
Director | Industrial Agency



# MARKET OVERVIEW

## RETAIL



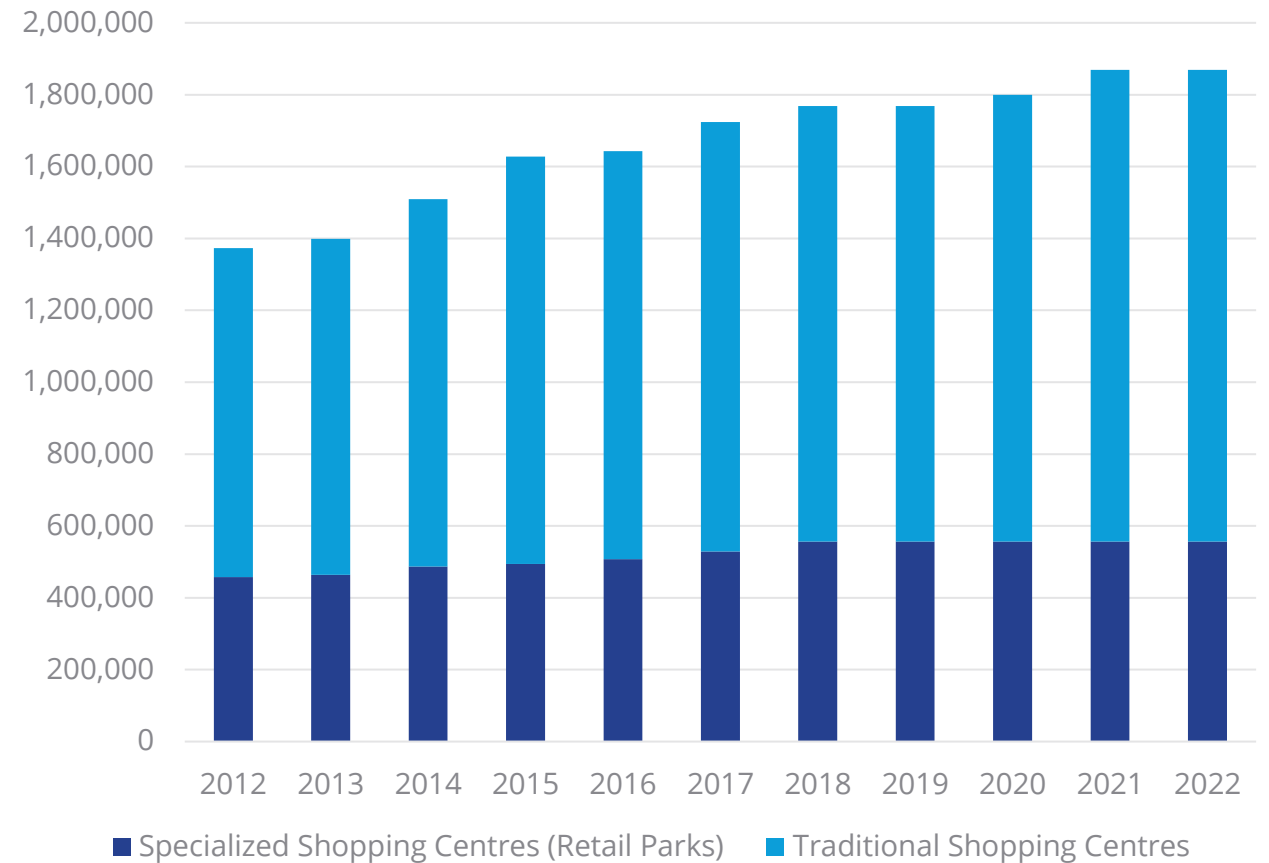
*There are two major traditional shopping centre projects due for delivery in 2022 – 25,000 sqm extension to the Eurovea shopping centre in Bratislava and 26,000 sqm Promenada shopping centre in Nitra.*



**Richard Urvay**

Managing Director | Slovakia

**Retail stock evolution, Slovakia (sqm)**





## FOR MORE INFORMATION



### RESEARCH

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