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Slovakia Office Market Report

H1 2026

Bratislava office demand hits a decade high as vacancy eases and prime rents push toward €21/month

Bratislava · Košice · Žilina · Nitra

Published 2026-07-02 · www.officerentinfo.com

National overview — Slovakia Office

The Slovak office market is concentrated almost entirely in Bratislava, which recorded its strongest leasing year in a decade in 2025. Per the Bratislava Research Forum (reported by Cushman & Wakefield), gross take-up reached roughly 271,000 m^2 across 2025 — up about 35% year on year — while the vacancy rate fell to 14.09%, the lowest since early 2023 but still the highest among the CEE-6 capitals. A new 2025 measurement methodology that excludes owner-occupied buildings reset total modern stock to about 1.75 million m^2. Prime headline rent climbed to €21.00/m^2/month (~€252/m^2/year), driven by scarce A+ space, with prime office yields around 6.25%. Regional cities — Košice, Žilina, Nitra — lack a formal institutional office panel; demand there is real (notably Košice's IT sector) but no citable modern-stock, rent or vacancy figures are published, so those markets are shown as estimates or not published.

PRIME RENT CITED
€252/m^2/yr
Bratislava Research Forum / Cushman & Wakefield · Q4 2025

PRIME YIELD CITED
6.25%
Cushman & Wakefield · H1 2025

VACANCY RATE CITED
14.09%
Bratislava Research Forum / Cushman & Wakefield · Q4 2025

TAKE-UP CITED
271,000 m^2
Bratislava Research Forum / Cushman & Wakefield · FY 2025

PIPELINE CITED
38,800 m^2
Cushman & Wakefield · Q1 2025

TOTAL STOCK CITED
1,750,000 m^2
Bratislava Research Forum / Cushman & Wakefield · Q4 2025

PRIME RENT BY CITY (€/M^2/YR)

Bratislava	€252/m^2/yr
Košice	€120–168/m^2/yr est
Žilina	€108–156/m^2/yr est
Nitra	€108–156/m^2/yr est

PRIME YIELD BY CITY (%)

Bratislava	6.25%
Košice	*not published*
Žilina	*not published*
Nitra	*not published*

Outlook. With a limited development pipeline and A+ space in short supply, landlords retain pricing power in prime CBD product and further rent adjustment is anticipated into 2026, even as elevated overall vacancy keeps secondary and B-grade space tenant-favourable. Regional office demand should continue to broaden as occupiers look beyond a saturated capital toward higher-yielding cities such as Košice and Žilina.

Methodology & data provenance

Every figure in this report is attributed to named commercial real-estate research, marked as a labelled estimate, or shown as "not published". Nothing is stated without provenance.

CITED FIGURES	LABELLED ESTIMATES	NOT PUBLISHED
12	**3**	**15**
from third-party research	interpolated, basis stated	no source this period

CITED

Sourced from research houses

Prime rent, yield, vacancy, take-up, pipeline and stock are drawn from published market reports by leading research houses such as JLL, CBRE, Cushman & Wakefield, Colliers, BNP Paribas Real Estate, Savills and Knight Frank. The specific sources used in this report are named on the Sources page. Where a house quotes a range (e.g. a prime-yield band), the range is shown. Each figure carries its source and as-of period.

- **Prime rent** — Top achievable rent, best-in-class space (€/m²/yr).
- **Prime yield** — Net initial yield, prime fully-let asset (%).
- **Vacancy rate** — Vacant ÷ total stock (%).
- **Take-up** — Space leased in the period (m²).
- **Pipeline** — Under construction / to be delivered (m²).
- **Total stock** — Total modern stock (m²).

ESTIMATE

Estimates & gaps

The major research houses cover capital cities and the primary axes closely, but publish little for smaller regional markets. Where no figure is published, we either show "not published" or a clearly-tagged estimate range with its basis stated on the figure (typically interpolation from the national prime and a regional discount). Estimates are our own and are never presented as third-party data.

Reporting periods differ by source (e.g. Q1 2026, H2 2025, FY 2025); each figure shows its own as-of date. Data compiled 2026-07-02, market data as of Q4 2025 – Q1 2026 (latest published).

City markets

Bratislava
6 of 6 metrics published

Bratislava is effectively the entire institutional Slovak office market; figures from Bratislava Research Forum / Cushman & Wakefield, 2025 methodology (excludes owner-occupied stock). Prime rent €21/m²/month.

PRIME RENT CITED
€252/m²/yr
Bratislava Research Forum / Cushman & Wakefield · Q4 2025

PRIME YIELD CITED
6.25%
Cushman & Wakefield · H1 2025

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14.09%
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271,000 m²
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38,800 m²
Cushman & Wakefield · Q1 2025

TOTAL STOCK CITED
1,750,000 m²
Bratislava Research Forum / Cushman & Wakefield · Q4 2025

Košice
1 of 6 metrics published

No institutional office panel publishes Košice modern-office stock, rent, vacancy or take-up. Growing IT-driven demand; rent estimated below capital levels.

PRIME RENT ESTIMATE
€120–168/m²/yr
Est. · Regional Slovak city offices transact ~€10-14/m²/month, below Bratislava prime; no published series

PRIME YIELD
not published

VACANCY RATE
not published

TAKE-UP
not published

PIPELINE
not published

TOTAL STOCK
not published

City markets

Žilina 1 of 6 metrics published

No published modern-office series for Žilina; small market dominated by automotive/industrial (Kia).

PRIME RENT ESTIMATE

€108–156/m²/yr

Est. · Regional secondary-city office rents ~€9-13/m²/month; no institutional data

PRIME YIELD

not published

VACANCY RATE

not published

TAKE-UP

not published

PIPELINE

not published

TOTAL STOCK

not published

Nitra 1 of 6 metrics published

No published modern-office series for Nitra; industrial/automotive-led (Jaguar Land Rover cluster) rather than an office hub.

PRIME RENT ESTIMATE

€108–156/m²/yr

Est. · Regional secondary-city office rents ~€9-13/m²/month; no institutional data

PRIME YIELD

not published

VACANCY RATE

not published

TAKE-UP

not published

PIPELINE

not published

TOTAL STOCK

not published

Sources & disclaimer

CITED THIRD-PARTY RESEARCH

- **Bratislava Research Forum / Cushman & Wakefield** — Bratislava Office Market — record growth, Q4 2025 (2025 methodology) (Q4 2025).
  https://www.officerentinfo.sk/article/officemarket-news/bratislava-office-market-sees-record-growth-in-q4-2025-what-businesses-need-to-know
- **Cushman & Wakefield** — Bratislava Office Market Q1 2025 — new assessment methodology (Q1 2025).
  https://cushwakeoffices.sk/en/news/2025/bratislavsky-kancelarsky-trh-q1-2025-nova-metodika-a-najsilnejsi-start-roka-za-dekadu
- **Cushman & Wakefield** — CEE Investment Market Report H1 2025 (Slovakia) (H1 2025).
  https://www.cushmanwakefield.com/en/slovakia/insights/cee-investment-market-report

Disclaimer. Figures are attributed to the third-party research houses named above and reflect their respective definitions and reporting periods; OfficeRentInfo does not warrant their accuracy. Figures tagged “estimate” are OfficeRentInfo’s own labelled approximations for markets where no figure is published, and must not be read as third-party data. Reporting periods and market definitions differ between houses. This report is provided for information only and does not constitute investment, valuation or letting advice.