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Slovakia Warehouse Market Report

H1 2026

Slovak logistics stock passes 4.8 million m^2 as a strong Q4 lifts take-up but vacancy stays near multi-year highs

Bratislava · Košice · Žilina · Nitra

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National overview — Slovakia Warehouse

Slovakia's modern industrial and logistics stock surpassed 4.83 million m² by end-2025 (about 4.67 million m² at Q3 2025), concentrated in Western Slovakia around Bratislava, Senec, Trnava and Nitra. After a soft mid-year, demand rebounded in Q4 2025 with net take-up around 82,496 m² as several major projects completed; the vacancy rate eased to 7.40% at Q4 2025 from 7.72% at Q3 — still among the highest in recent years, reflecting rising speculative supply. Prime headline rent held at €5.40/m²/month (~€64.80/m²/year), with the market average around €5.07/m²/month; abundant new supply is keeping rental growth subdued and handing tenants leverage in competitive submarkets such as Trnava and Senec. Prime industrial yields were about 6.00% in Bratislava and 6.25% nationally. City-level numeric detail for Košice, Žilina and Nitra is not separately published, so those slugs are estimated or not published.

PRIME RENT CITED
€64.8/m²/yr
Cushman & Wakefield / 108 Real Estate (Slovak industrial market) · Q4 2025

PRIME YIELD CITED
6.25%
Cushman & Wakefield · H1 2025

VACANCY RATE CITED
7.4%
Cushman & Wakefield / 108 Real Estate (Slovak industrial market) · Q4 2025

TAKE-UP CITED
82,496 m²
Cushman & Wakefield / 108 Real Estate (Slovak industrial market) · Q4 2025 (net, quarter)

PIPELINE CITED
311,365 m²
108 Real Estate · Q3 2025

TOTAL STOCK CITED
4,830,000 m²
Cushman & Wakefield / 108 Real Estate (Slovak industrial market) · Q4 2025

PRIME RENT BY CITY (€/M²/YR)

Bratislava	€64.8/m²/yr
Košice	€54–66/m²/yr est
Žilina	€54–66/m²/yr est
Nitra	€54–66/m²/yr est

PRIME YIELD BY CITY (%)

Bratislava	6%
Košice	*not published*
Žilina	*not published*
Nitra	*not published*

Outlook. Continued speculative deliveries should keep national vacancy elevated and rents broadly flat into 2026, sustaining a tenant-favourable market. Longer term, automotive and nearshoring demand around Nitra (JLR), Trnava, Žilina (Kia) and eastern hubs near Košice underpins structural absorption, but landlords face pressure until the supply overhang is absorbed.

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
8	4	18
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

3 of 6 metrics published

Bratislava/Western Slovakia (incl. Senec) is the core logistics cluster; prime rent and Bratislava prime yield are citable, other metrics reflect the national market.

PRIME RENT CITED

€64.8/m²/yr

Cushman & Wakefield / 108 Real Estate (Slovak industrial market) · Q4 2025

PRIME YIELD CITED

6%

Cushman & Wakefield · H1 2025

VACANCY RATE ESTIMATE

7.4%

Est. · National vacancy used as proxy; Bratislava/Senec submarket not separately published

TAKE-UP

not published

PIPELINE

not published

TOTAL STOCK

not published

Košice

1 of 6 metrics published

Eastern Slovak logistics hub with growing occupancy, but no institutional panel publishes Košice-specific figures.

PRIME RENT ESTIMATE

€54–66/m²/yr

Est. · Eastern-region prime industrial rents broadly in line with/below the €5.40/m²/month national 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

Northwest automotive cluster (Kia). Strong industrial demand on long-term leases, but no separately published figures.

PRIME RENT ESTIMATE

€54–66/m²/yr

Est. · Regional prime industrial rent in line with national ~€5.40/m²/month; no institutional city series

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

Major automotive/industrial focal point (Jaguar Land Rover); one of the most active leasing submarkets in Western Slovakia, but city-level numeric data is not published.

PRIME RENT ESTIMATE

€54–66/m²/yr

Est. · Western-Slovakia prime industrial rent around national ~€5.40/m²/month; no published Nitra-specific series

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

- **Cushman & Wakefield / 108 Real Estate (Slovak industrial market)** — Slovak Industrial Real Estate — 2026 outlook (Q4 2025 data) (Q4 2025).
  https://www.warehouserentinfo.sk/article/warehousemarket-news/slovak-industrial-real-estate-booms-what-businesses-need-to-know-for-2026
- **108 Real Estate** — 2025/Q3 Industrial Property Market Report – Slovak Republic (Q3 2025).
  https://www.108realestate.sk/en/report/2025-q3-industrial-property-market-report-slovak-republic/
- **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; WarehouseRentInfo does not warrant their accuracy. Figures tagged “estimate” are WarehouseRentInfo’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.