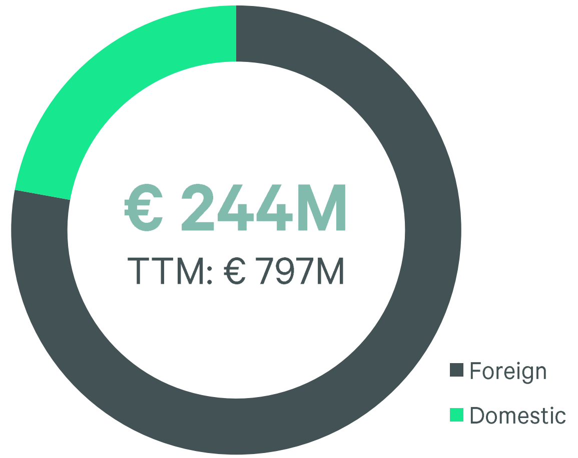
Slovakia Real Estate Investment Volumes H1 2026

Investment activity throughout the first half of 2026 amounted to approximately €244 million distributed across 8 individual transactions, whereas the rolling twelve-month investment volume reached €797 million. These transactions were allocated across three distinct asset classes, including office, retail and industrial and logistics properties, thereby reflecting a comparatively balanced distribution of activity throughout the market.

The investor base remained predominantly regional in composition, with Central European capital continuing to perform a pivotal function in driving overall investment activity. Czech investors were the most active participant group, representing 73% of the aggregate volume and concluding the highest number of transactions during the period. Slovak capital followed subsequently with a 22% share, while investors from Asia contributed the remaining 5%. In terms of sectoral distribution, office assets represented the largest proportion of total investment volume at 66%, followed by the retail sector at 26%, while industrial and logistics transactions comprised the remaining 8%.

Looking ahead, several transactions across all major sectors are currently progressing through the sale process. Central European investors are anticipated to remain the dominant source of capital, with office and retail assets continuing to form the active investment pipeline.



Purchaser capital origin

- 43%
Y-on-Y change H1

- 1%
Y-on-Y change TTM

Nr. of transactions
8
24 TTM

Y-on-Y: Year on Year
TTM: Trailing Twelve Months

Investment Volumes by Sector

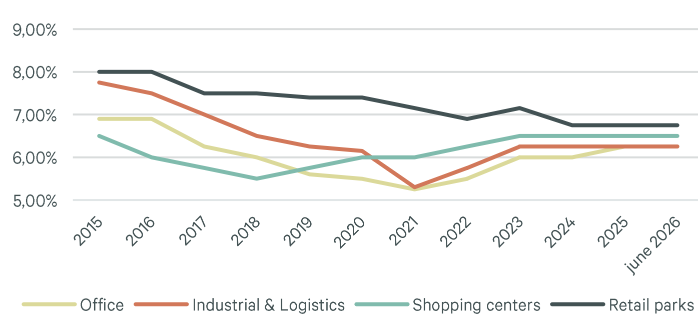
▶ Indicates Y-o-Y change

OFFICE
€ 160M
TTM: € 283M
▲

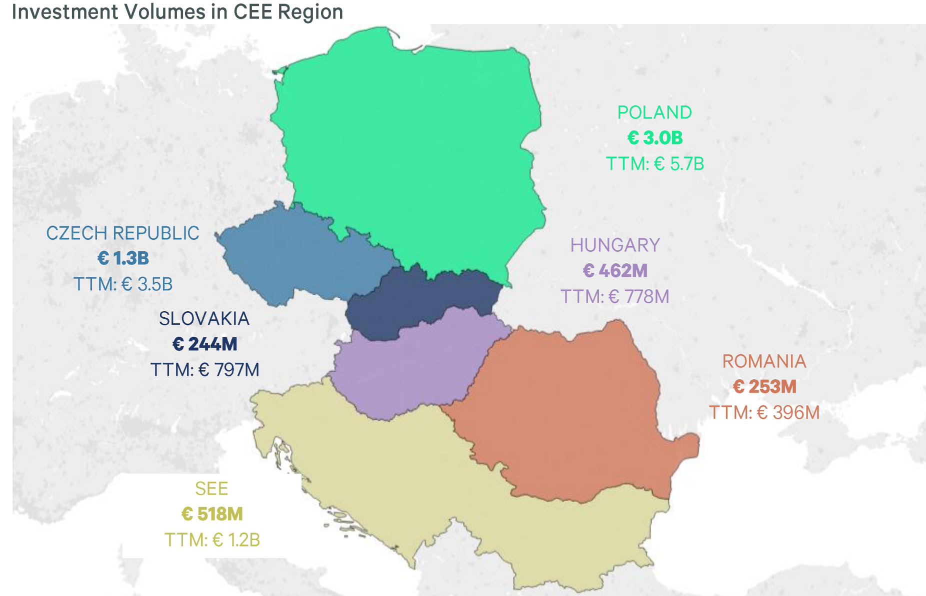
RETAIL
€ 63M
TTM: € 314M
▼

INDUSTRIAL
€ 21M
TTM: € 200M
▼

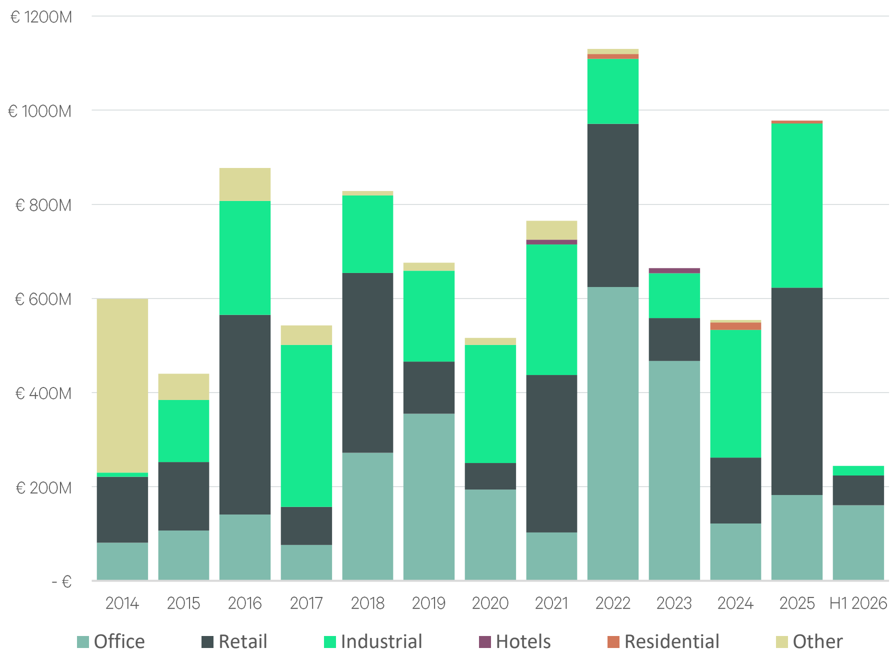
Prime Yield Development by Sector



Investment Volumes in CEE Region



Investment Volumes Annual by Sector (Slovakia)



Several noteworthy transactions were successfully concluded throughout the first half of 2026. Within the office segment, key activity included the sale of The Mill office building in Bratislava by Immocap to a Czech investment fund, as well as the consolidation of complete ownership of the Einsteinova Business Center by CPI Property Group. The Mill, completed in recent years, provides modern office accommodation secured by a long-term lease agreement to a major international occupier. In the case of the Einsteinova Business Center, CPI acquired the remaining minority stake from the previous co-owners and thereby established itself as the sole owner of the entire complex. Beyond the capital city, office investment activity was additionally recorded in Košice, where the BCT 1 office building underwent a change of ownership.

Within the industrial and logistics segment, a disposal of a Slovak industrial park by ARETE to an Erste-managed fund was successfully finalized. The asset is fully leased to a single tenant under a long-term lease arrangement, thereby providing stable and predictable contractual income for the new owner. In addition, the former ECCO production facility in Martin was sold to WIA Slovakia, a member of the Hyundai WIA group, with intentions to restart production activity at the site and generate new employment opportunities in the region.

Prime yields remained stable and unchanged on a quarter-on-quarter basis. The office prime yield stood at 6.25%, representing an increase of 25 basis points compared with the same period of the previous year. The industrial & logistics prime yield held steady at 6.25%, while the shopping center prime yield remained at 6.50%. The retail park prime yield closed the quarter at 6.75%.

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REPORT FIGURES