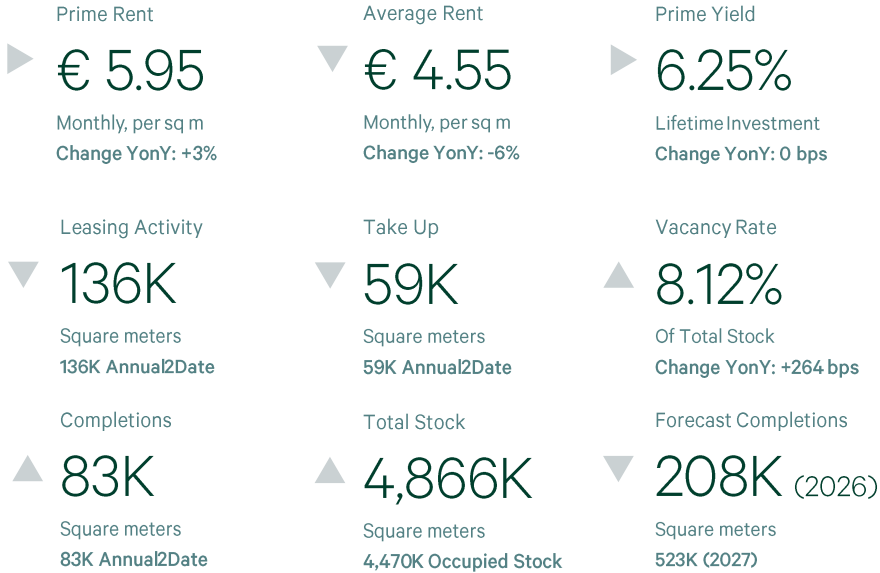


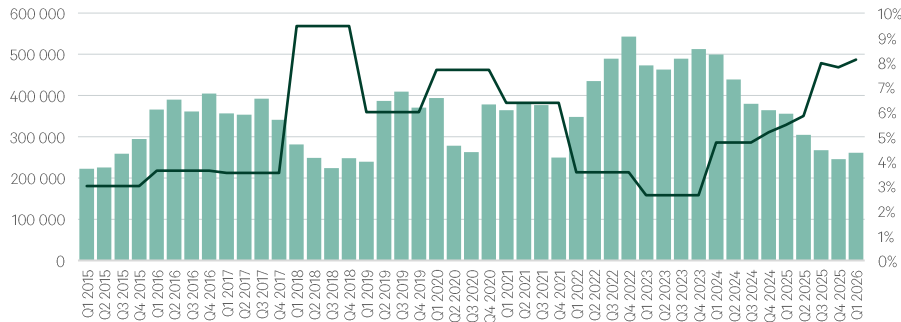
Slovakia

KEY PERFORMANCE INDICATORS



▶ Indicates quarter change

MARKET TREND (Take-up - Last 12 Months | Vacancy rate)

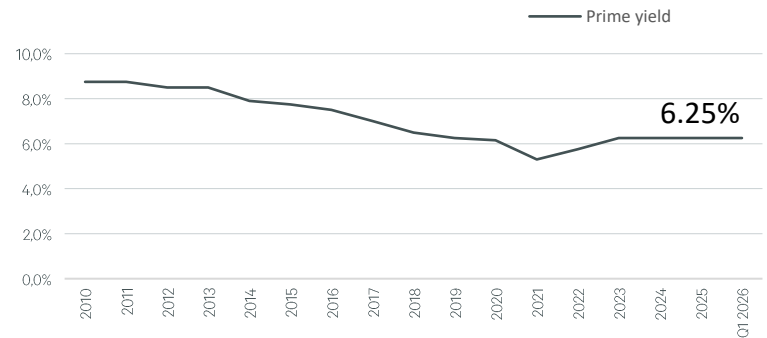


The Slovak industrial and logistics market opened 2026 on a notably solid footing, delivering a steady start to the year. Total leasing activity reached approximately 136,000 sq m, up a considerable 47% year-on-year, while take-up came in at around 59,000 sq m, marking a 35% increase on the same period last year. Renegotiations once again remained the defining feature of the market for the second consecutive quarter, accounting for 53% of all transactions. Pre-leases contributed a further 26%, while new leases made up 16%, short-term leases 4%, and expansions the remaining 1%. The Greater Bratislava Area continued to anchor occupier demand, capturing a dominant 72% of total leasing demand. Western Slovakia also delivered a strong performance this quarter, contributing 22%, while Eastern Slovakia accounted for the remaining 6%. The Automotive sector led occupier demand, driving a substantial 31% of leasing activity. 3PL followed closely behind at 30%, with E-commerce at 17%, Retail at 11%, and Production at 10%, while Other categories accounted for the final 1%.

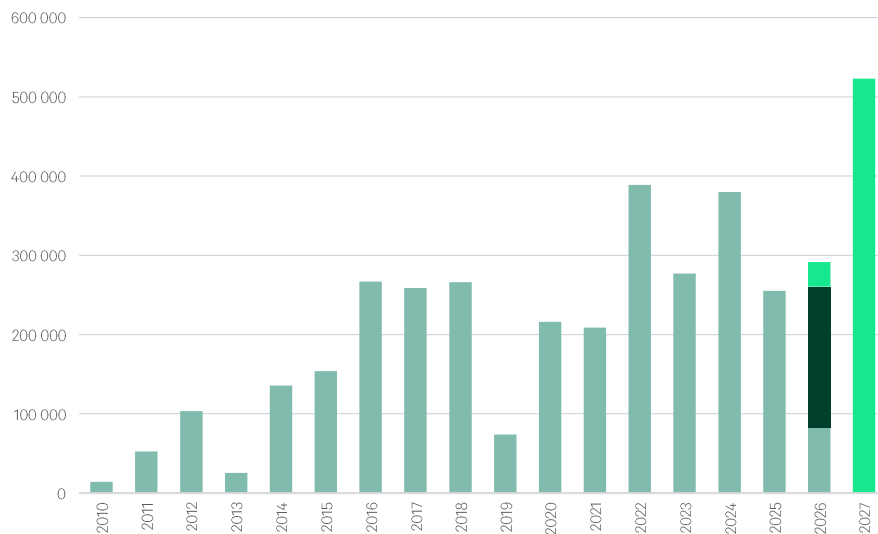
The vacancy rate edged upward by 31 basis points quarter-on-quarter to 8.12%, with Western Slovakia posting the highest rate in the country at 10.27%, followed closely by Central Slovakia at 9.83%. The Greater Bratislava Area remained relatively more constrained at a tighter 6.92%, while Eastern Slovakia continued to record the tightest conditions overall in the country at just 2.66%. New Supply was particularly solid in the first quarter, with 83,000 sq m delivered to the market. The pipeline currently stands at approximately 178,000 sq m under construction, with all scheduled deliveries anticipated within the course of 2026.

Prime headline rent held firm at €5.95 per sq m per month, unchanged quarter-on-quarter, and a further 3% ahead compared to the prior year. Average rent softened slightly to €4.55 per sq m per month.

INDUSTRIAL & LOGISTICS YIELD DEVELOPMENT



STOCK DEVELOPMENT (Completions | Under construction | Future pipeline)



Definitions

A-class building

- Good access for trucks to main roads; A clear internal usable height between 8 m and 12 m
- Modern loading docks with levellers; One overhead door per unit (exception applies to custom-built premises)
- Concrete cast floor with minimum floor load bearing capacity of 5 tons per square meter
- Internal column grid 12X24 m
- Skylights in the roof acting as smoke vents; Minimum lightning power on floor level of 200 Lx
- Heating; insulated facade (sandwich panels); High standard office and social area available
- Car and truck parking

Vacancy rate:

Ratio of physically vacant space in completed buildings on the total stock of warehouse and industrial space including office areas reported for press releases.

Total stock and new supply:

Modern developer-led warehouse, industrial and production space of A-class quality, owned by a developer or investor for lease to third parties. It does not include owner-occupied stock. New supply includes the above-mentioned space completed during the given period.

Total leasing activity and take-up:

Total leasing activity represents the total volume of space leased within period. Take-up represents the total floor space that was let or pre-let over the specified period without renegotiations.

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Q1 2026

REPORT FIGURES

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