CBRE

Bratislava Living Figures Q2 2026

KEY PERFORMANCE INDICATORS

NEWLY BUILT APARTMENTS

Average Offer Price	Apartments For Sale	Sold Apartments
▼ € 5,341	▲ 4,231	▼ 652
Per sqm	# units for sale	# units sold
Change YonY: +2%	**Change YonY: +25%**	**Trailing 12 months: 2,666**

RENTAL VALUE*

Prime Location**	Secondary Location***	Listings For Rent
▼ € 19	▶ € 16	▼ 2,195
Monthly, per sq m	Monthly, per sq m	# of units for rent
Change YonY: +1%	**Change YonY: +8%**	**Change YonY: -18%**

*Represents the average rent in Bratislava (newly built and old ones) in size range of 20-70 sq m
**Represents only Staré Mesto city district
***Represents Nové Mesto, Ružinov and Petržalka city districts

▶ Indicates quarter change

By the end of Q2 2026, Bratislava's new-build market moved into a more supply-rich phase, with available stock rising to 4,231 units across 105 projects. This represented an increase of around 300 units quarter-on-quarter, as fresh launches and new phases of existing developments continued to enter the market and progressively outpaced the rate at which units were being absorbed. Pricing nonetheless held firm against this build-up in supply, with the average offer price reaching €5,341 per sq m, an increase of roughly 2% year-on-year. The average size of apartments currently on offer likewise held steady at 66 sq m,

On the demand side, a total of 652 apartments were sold over the course of Q2, representing a decline of around 12% from volume recorded in Q1. The previous quarter had, however, been inflated by exceptionally strong sales in one large project, so that underlying demand across the market remained broadly unchanged between the two periods.

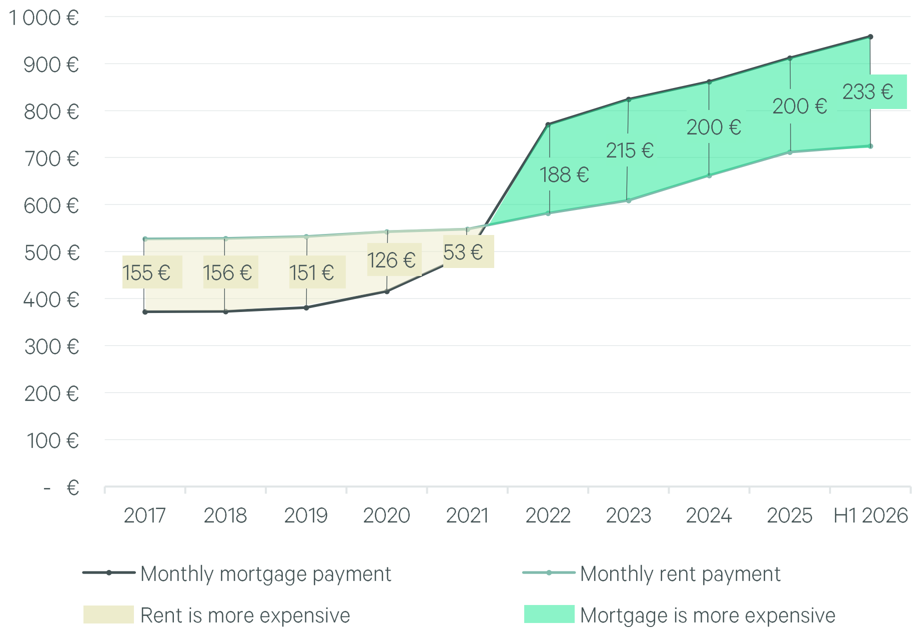
Looking ahead, supply has topped 4,000 units for the first time since 2017, giving buyers more choice and stronger negotiating power as developers compete harder. With quarterly sales around 25% below the 2014–2021 norm and much of the offer in the higher segment while starter units stay scarce, pricing should hold stable rather than accelerate. Demand remains shaped by interest rates and subdued economic conditions, and quarterly sales should settle at around 600–700 units. The trajectory of supply stays the key variable to watch, as any further build-up could weigh on the market.

Sold newly built apartments I Mortgage interest rate

Source: National Bank of Slovak Republic, Bencont Investments, Q2 2026

Average asking price (€/ sq m) I Newly built apartments for sale

Source: Bencont Investments, Q2 2026



Source: National Bank of Slovak Republic, Eurostat

Residential Health Index

The Residential Health Index highlights the relationship between mortgage payments and monthly rent for the same property. Until 2021, interest rates were declining, making it clearly advantageous to pay the monthly mortgage installment, which was often lower than the rent for a comparable property. Low interest rates gradually pushed housing prices higher, and in 2022, the situation began to change. Interest rates significantly increased, and the monthly mortgage payment now exceeds the rent, making renting more favorable in terms of monthly expenses. The provided amounts in the graph indicate by how many euros one option is more advantageous than the other.

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REPORT FIGURES