CBRE

Slovenia - Ljubljana

KEY PERFORMANCE INDICATORS (Q2 2026)

Prime Rent
€ 7.50
Monthly, per sq. m.

Prime Yield
7.00% (May 2026)
Prime logistics

GDP Growth
3.0% (Q1 2026)
Source: Statistical Office of Slovenia

Planned (Speculative)
112.2 K
sq. m. of Distribution warehouse, Slovenia

Building permits for industrial buildings
+5,7% (Jun-May, yoy)
Source: Statistical Office of Slovenia

CPI
3.6% (May, yoy)
Source: Statistical Office of Slovenia

NOTABLE PIPELINE PROJECTS

Project	Status	Size sq. m.	Supply type	Location
SPAR expansion	UC	20,000	Owner occupied	BTC, Ljubljana
LogExpert phase II	Planned	15,000	Speculative	Brnik
Log Center Adria II	Planned	47,400	Speculative	Sežana
Log Center Maribor II	Planned	20,000	Speculative	Maribor
Warehouse in Hrastje zone	Planned	15,600	Speculative	Kranj

During the second quarter of 2026, Slovenia's industrial market saw no new completions. The most recent speculative development was delivered in Q2 2025, when LOGSpot completed a 26,000 sq m distribution warehouse in Logatec. The project expanded the country's industrial stock and was awarded BREEAM certification.

With several projects in the pipeline, a gradual increase in speculative supply is expected in the coming years. One of the most prominent developments is the second phase of the LogExpert distribution warehouse in Brnik, north of Ljubljana, which is set to add approximately 15,000 sq. m. to the industrial stock. GoAsset Development, in partnership with BHM Group, is preparing the next phase of Log Center Adria in Sežana, near Koper. This 46,700 sq. m. expansion will increase the total size of the complex to around 120,000 sq. m. Additionally, the second phase of Log Center Adria in Maribor, developed by BHM Group, includes a planned 20,000 sq. m. extension, bringing the total site area to approximately 50,000 sq. m. and further enhancing the group's logistics portfolio. Another noteworthy project in the pipeline is the recently announced distribution centre in the Hrastje business zone in Kranj. Developed by the local investors, the facility is expected to be completed in early 2027. The project will comprise approximately 15,600 sq. m. of industrial space and is planned to serve as a key distribution hub for DSV.

Looking ahead, the industrial market is expected to be further supported by several ongoing owner-occupier developments. Among the most notable is the expansion of the SPAR logistics and distribution center in Ljubljana's BTC area, which will add approximately 20,000 sq. m. of modern logistics space upon completion in 2026. In addition, the second and third phases of the Harvey Norman logistics center in Maribor are expected to deliver a further 31,500 sq. m. of industrial stock.

Industrial development in Slovenia is increasingly extending beyond the capital, with secondary cities such as Sežana, Maribor, and Kranj gaining momentum. Supported by improving infrastructure and rising investor interest, these locations are becoming attractive destinations for new logistics and warehouse developments. Rental levels remained stable during the quarter, averaging €7.5 per sq. m. per month. However, rental growth is expected in the near term, supported by the delivery of new, modern industrial stock entering the market at higher rental levels than existing properties.

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