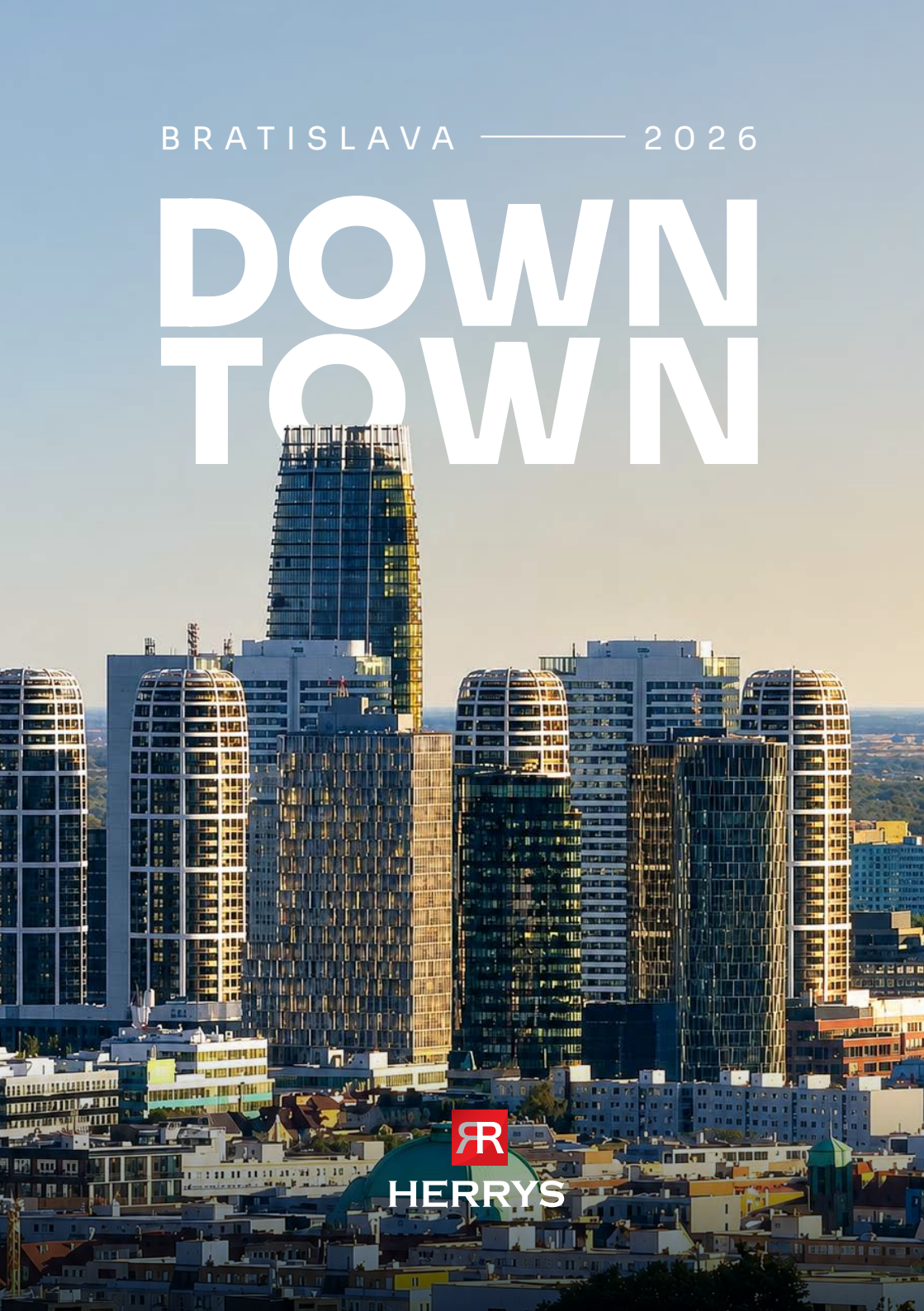
BRATISLAVA — 2026

DOWN TOWN



HERRYS

Introduction

- Bratislava's downtown is one of the most striking urban transformations in Slovakia. On a relatively compact area, a modern city district is emerging that connects residential living, offices, retail, services, gastronomy, culture, public spaces and the Danube riverfront.
  In a European context, it is an exceptional example of the transformation of a former industrial and administrative area into a full-fledged city centre that has taken shape within a single generation.

- From a real estate perspective, this is a location with an exceptionally strong position. Downtown has the largest volume of new residential development in Bratislava, while also benefiting from its proximity to the historic centre, good transport links and steadily expanding civic amenities. Together, these factors support the long-term appeal of the area for residents, investors and developers.

- This analysis provides a comprehensive view of the current state of the residential market in Bratislava's downtown. It maps existing projects, developments in preparation, the secondary market and the rental housing segment. The material includes an overview of supply, price levels and other indicators that influence the decisions of buyers, investors and tenants.

- The analysis also captures the gradual development of the market after a period of intensive construction. As the number of completed projects grows, individual residences are starting to stand out more clearly, not only by price but also by architectural quality, technical standard, layouts, views and range of services. The market is thus naturally shifting from general growth to a more detailed evaluation of individual projects.

- A stable rental segment is also a significant part of the downtown. The concentration of jobs, office centres, shops, restaurants, services and high-quality public spaces creates an environment with high everyday usability. It is precisely these factors that support long-term interest in living in the area and confirm its appeal not only for owner-occupied housing, but also for investment purposes.

- This analysis aims to identify the main development trends, compare individual residential projects and provide a full picture of the competitive environment in the downtown.

- The output also outlines price relationships, the character of the supply and the factors that will influence the further development of one of the most important and most valuable residential locations in Bratislava.



Market commentary in Bratislava's downtown

- **Downtown is developing into a standalone residential market**

  Over the past few years, Bratislava's downtown has changed from a developing locality into a standalone residential submarket. It is no longer just a handful of iconic projects, but a coherent urban zone with a high concentration of new housing, offices, retail, services, gastronomy and quality public spaces.

  Projects such as Eurovea, Sky Park, Klingerka, Zwirn, Metropolis, Downtown Yards, Ister Tower, Sky Park Tower, Ganz House, Éclair and VEO are already standing or in preparation. The growing supply creates an environment in which individual developments increasingly compete with one another and set themselves apart through their own parameters.

- **The market is moving from scarcity to competition**

  The first projects in the downtown benefited from limited supply and the unique character of the location. Eurovea, Sky Park and Klingerka were perceived at the time of their market launch as exceptional products with minimal comparable alternatives.

  Today the situation is different. Buyers can choose among completed projects, projects just after final approval, developments under construction and upcoming phases. The choice is therefore increasingly shaped by the parameters of the specific apartment, such as layout, view, standard, amenities or overall value for the price.

Prices are beginning to differentiate more clearly

Price levels in the downtown are gradually diverging.

The top segment is represented mainly by Eurovea Tower, Eurovea Riverside and the best apartments in Sky Park Tower. Their value is supported by exceptional views, a Danube-side location, the architecture and the overall exclusivity of the project.

The second tier consists of projects such as Metropolis, Zwirn, Klingerka or the higher-quality parts of Sky Park. These projects retain a premium position, while their price level reflects to a greater extent the specific characteristics of individual apartments, such as floor, orientation or layout. The third tier is represented by larger-volume projects such as Downtown Yards or Ister Tower. They bring a significant number of new apartments to the market and expand the supply of more affordable housing within the downtown. Their success will depend mainly on appropriate pricing, the apartment mix and the ability to stand out from competing projects.

- **The biggest risk is the volume of future supply**

  The downtown remains a very attractive location, but a large number of new apartments will be added in the coming years. Projects such as Downtown Yards, Ister Tower, Sky Park Tower, Éclair, Ganz House, VEO and other developments in preparation will significantly expand the competitive environment.



- **This will have three main consequences:**

1. buyers will compare individual projects in more detail,
2. greater importance will be placed on correct pricing,
3. the highest demand will be retained by projects with a clear added value.

The best-performing apartments will be those with a high-quality view, an efficient layout, a reasonable absolute price, a high standard and clearly defined benefits. Conversely, larger apartments without a distinct competitive advantage or with a higher absolute price may have slower liquidity.

Downtown remains Bratislava's strongest urban location

Despite growing competition, the downtown continues to hold an exceptional position. No other part of Bratislava offers a comparable concentration of new housing, offices, shops, services, the Danube riverfront and walking distance to the historic centre.

In the long term, the downtown will therefore remain one of the most liquid and most valuable residential locations in Bratislava. However, the success of individual projects will increasingly be decided by their ability to offer the buyer concrete value, a quality product and clear differentiation from the competition.

- **Conclusion**

  Bratislava's downtown is entering a mature market phase. Demand for housing here remains strong, but supply is the widest in its history. Location alone is no longer the sole deciding factor. Success will increasingly depend on the quality of the architecture, the housing standard, the efficiency of the layouts, the attractiveness of the views and the ability to offer a convincing price-to-value ratio compared with other downtown projects.

Projects

No.	Project	No. of units	Completion date	Price primary / secondary market
1	METROPOLIS	298	2024	on request / available
2	SKY PARK 1–4	1,048	2019–2024	sold out / available
3	SKY PARK TOWER	393	2027	from 349,900 (1.5+kk) - 984,900 (4+kk) / unavailable
4	ISTER TOWER	489	2025 - 2029	from 290,000 (1+kk) - 1,196,240 (4+kk) / unavailable
5	EUROVEA TOWER	408	2023	on request / available
6	EUROVEA RIVERSIDE	96	2023	on request / available
7	ÉCLAIR	115	2028	on request / unavailable
8	DOWNTOWN YARDS	656	2024 - 2027	from 212,421 (1+kk) - 961,860 (4+kk) / available
9	KLINGERKA	380	2019 - 2021	sold out / available
10	ZWIRN	846	2020 - 2028	from 328,080 (2+kk) - 1,432,578 (4+kk) / available
11	VEO	84	2026 - 2031	on request / unavailable
12	Panorama City	606	2016	sold out / available
13	GANZ HOUSE	65	2023 - 2026	on request / unavailable
14	EUROVEA – Phase 1 / Eurovea Apartments	254	2010	sold out / available
15	Apollo Residence	80	2021	on request / available
16	PORTUM TOWERS	518	N/A	on request / unavailable
17	SKY PARK SQUARE	354	2030*	N/A
18	CHALUPKOVA	1,300	2032*	N/A
19	EAST TOWER	500	2032*	N/A

*estimated date for the first phases

Nearly **8,700 units** in Bratislava's downtown

Currently on sale **535 units**, under construction **1,825 units**

Of which approx. **2,800 units** in preparation

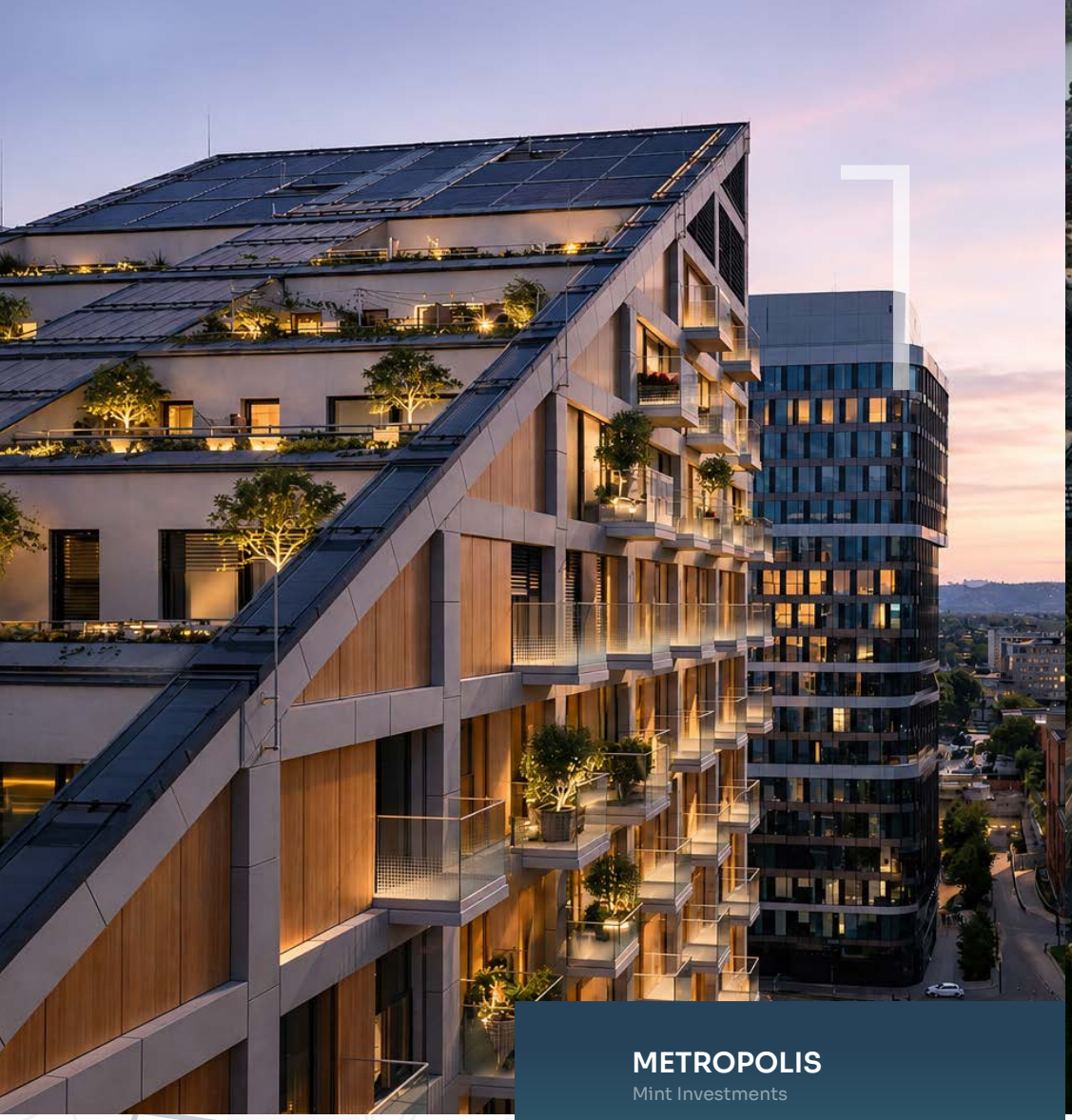
More than **5,000 units** have already been sold

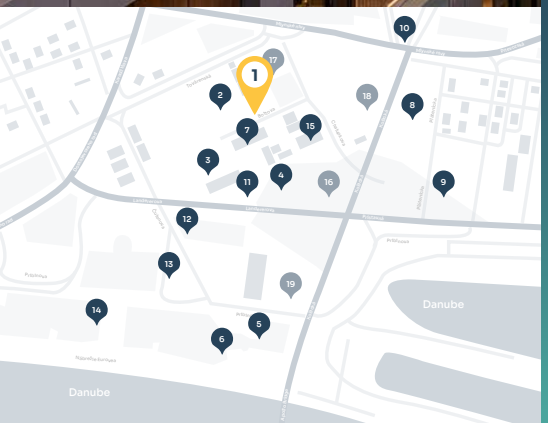
Average price reaches **7,025 €/m²** incl. VAT



Current projects

Planned projects





METROPOLIS

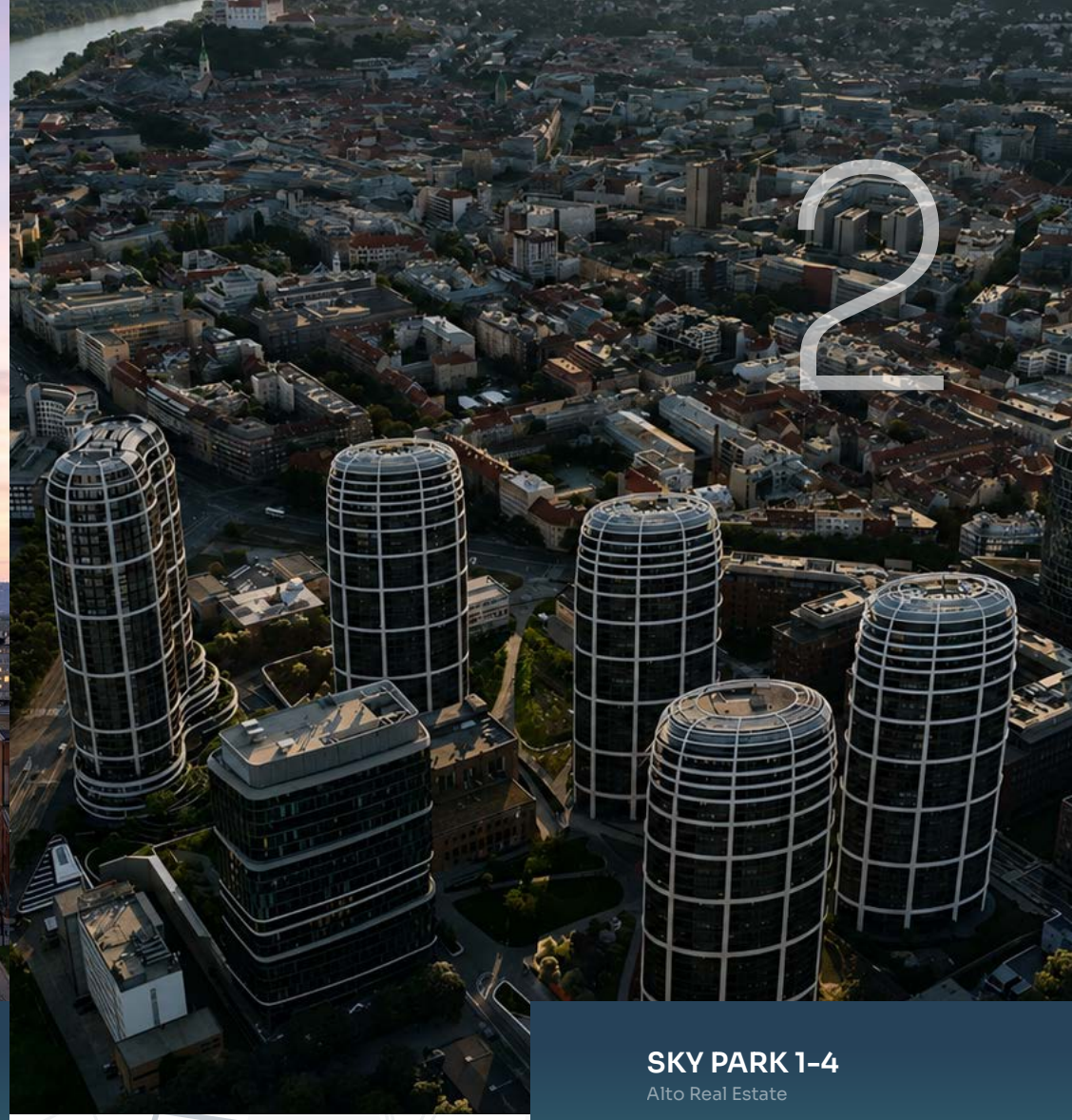
Mint Investments

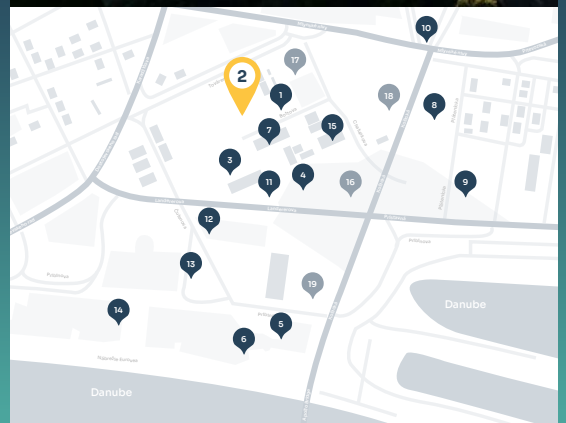
NUMBER OF UNITS
298

COMPLETION DATE
2021 - 2024

AVERAGE SALES PRICE
7,469 €/m²

SECONDARY MARKET
Approx. 15 units for sale
Approx. 20 units for rent





SKY PARK 1-4

Alto Real Estate

NUMBER OF UNITS
1048

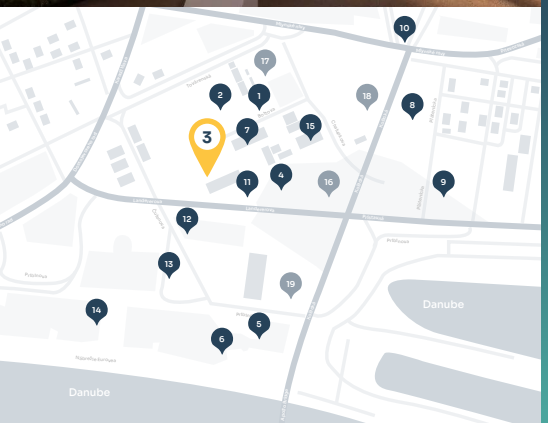
COMPLETION DATE
2019 – 2024

AVERAGE SALES PRICE
7,500 €/m²

SECONDARY MARKET
Approx. 20 units for sale
Approx. 20 units for rent



3



SKY PARK TOWER

Alto Real Estate

NUMBER OF UNITS
393

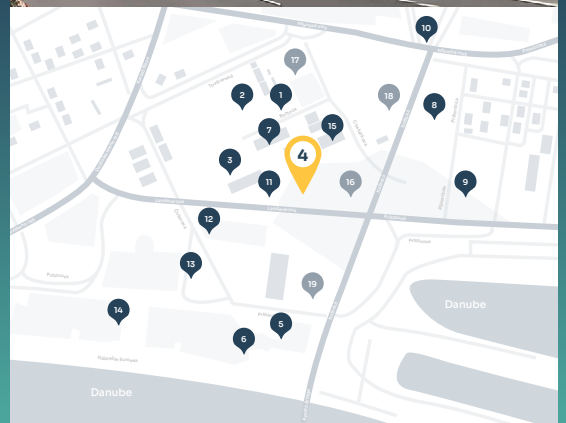
COMPLETION DATE
2024 - 2027

AVERAGE SALES PRICE
7,683 €/m²

SECONDARY MARKET
no listings



4



ISTER TOWER

The Galata Group, DRFG

NUMBER OF UNITS
489

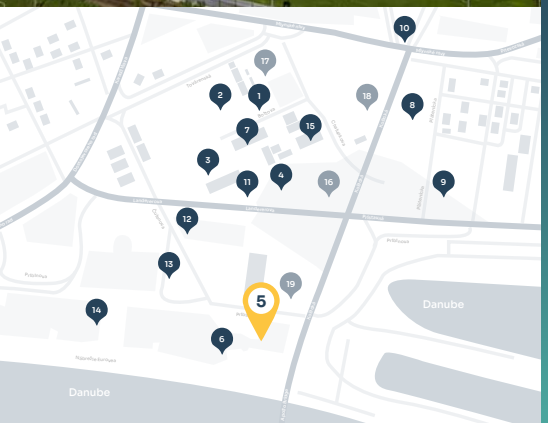
COMPLETION DATE
2025 - 2029

AVERAGE SALES PRICE
7,043 €/m²

SECONDARY MARKET
no listings



5



EUROVEA TOWER

J&T Real Estate

NUMBER OF UNITS
408

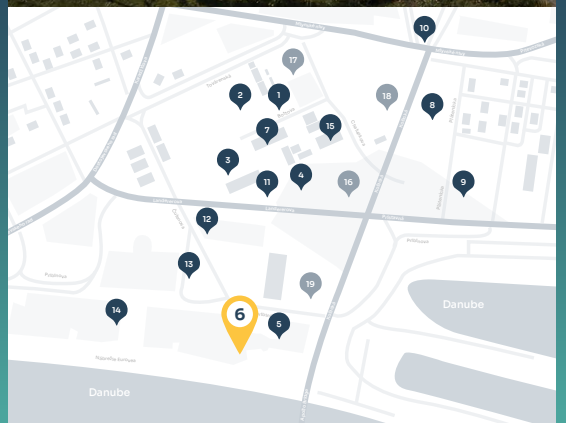
COMPLETION DATE
2019 - 2023

AVERAGE SALES PRICE
7,500 – 9,000 €/m²

SECONDARY MARKET
Approx. 25 units for sale
Approx. 25 units for rent



6



EUROVEA RIVERSIDE

J&T Real Estate

NUMBER OF UNITS
96

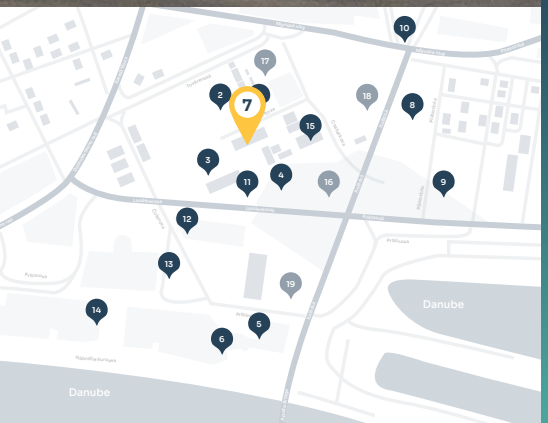
COMPLETION DATE
2019 - 2023

AVERAGE SALES PRICE
7,500 - 9,000 €/m²

SECONDARY MARKET
Approx. 5 units for sale
Approx. 10 units for rent



7



ÉCLAIR

Immocap

NUMBER OF UNITS
115

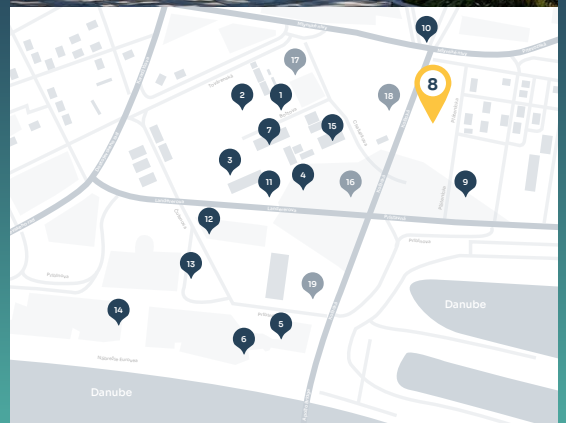
COMPLETION DATE
2026 - 2028

AVERAGE SALES PRICE
from 6,400 €/m²

SECONDARY MARKET
no listings



8



DOWNTOWN YARDS

J&T Real Estate

NUMBER OF UNITS
656

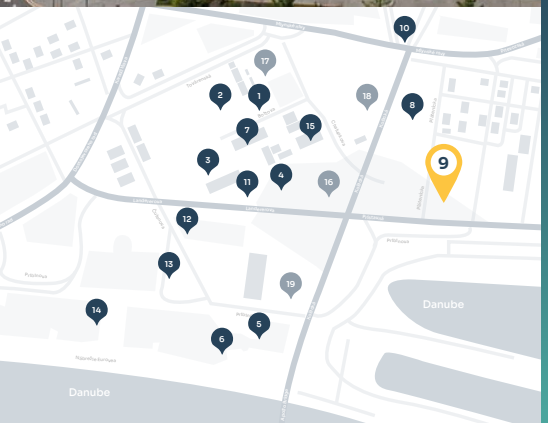
COMPLETION DATE
2024 - 2027

AVERAGE SALES PRICE
6,712 €/m²

SECONDARY MARKET
Approx. 15 units for sale



9



KLINGERKA

J&T Real Estate

NUMBER OF UNITS
380

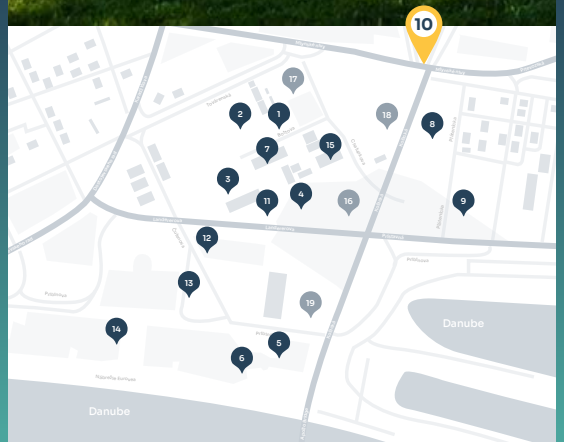
COMPLETION DATE
2019 - 2021

AVERAGE SALES PRICE
approx. 5,800 - 7,500 €/m²

SECONDARY MARKET
Approx. 1 unit for sale
Approx. 10 units for rent



10



ZWIRN

YIT Slovakia

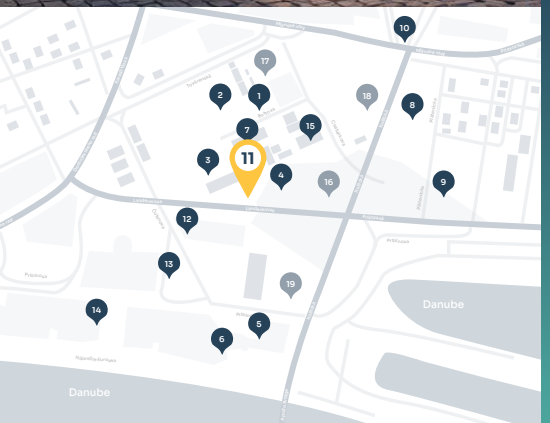
NUMBER OF UNITS
846

COMPLETION DATE
2020 - 2028

AVERAGE SALES PRICE
6,634 €/m²

SECONDARY MARKET
Approx. 25 units for sale
Approx. 15 units for rent





VEO

ISI development

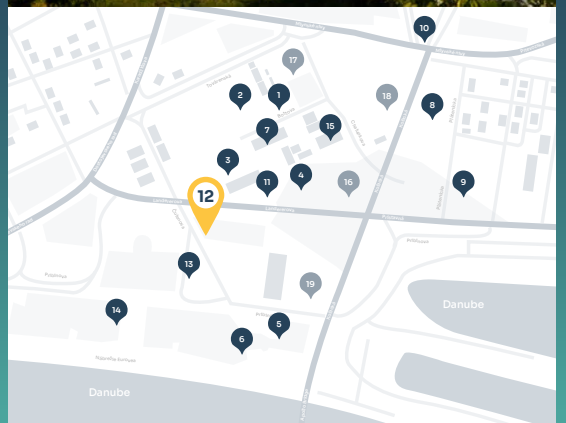
NUMBER OF UNITS
84

COMPLETION DATE
2026 - 2031

AVERAGE SALES PRICE
on request

SECONDARY MARKET
no listings





PANORAMA CITY

J&T Real Estate

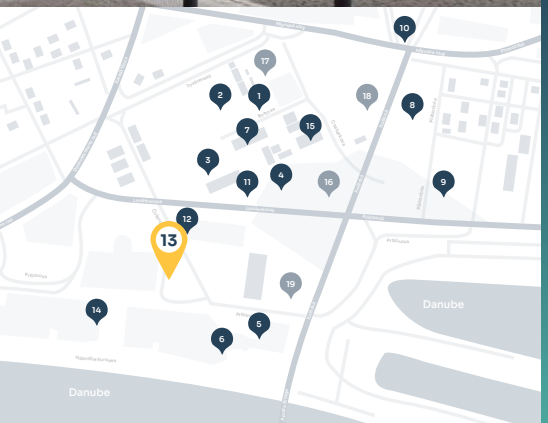
NUMBER OF UNITS
606

COMPLETION DATE
2013 - 2016

AVERAGE SALES PRICE
approx. 5,800 - 7,500 €/m²

SECONDARY MARKET
Approx. 10 units for sale
Approx. 10 units for rent





GANZ HOUSE

J&T Real Estate

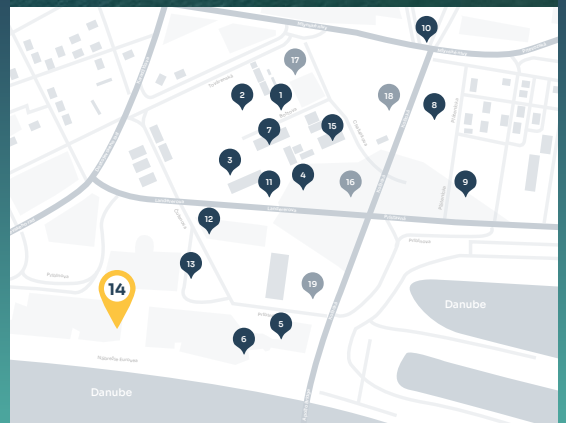
NUMBER OF UNITS
65

COMPLETION DATE
2023 - 2026

AVERAGE SALES PRICE
on request

SECONDARY MARKET
no listings





EUROVEA Phase 1

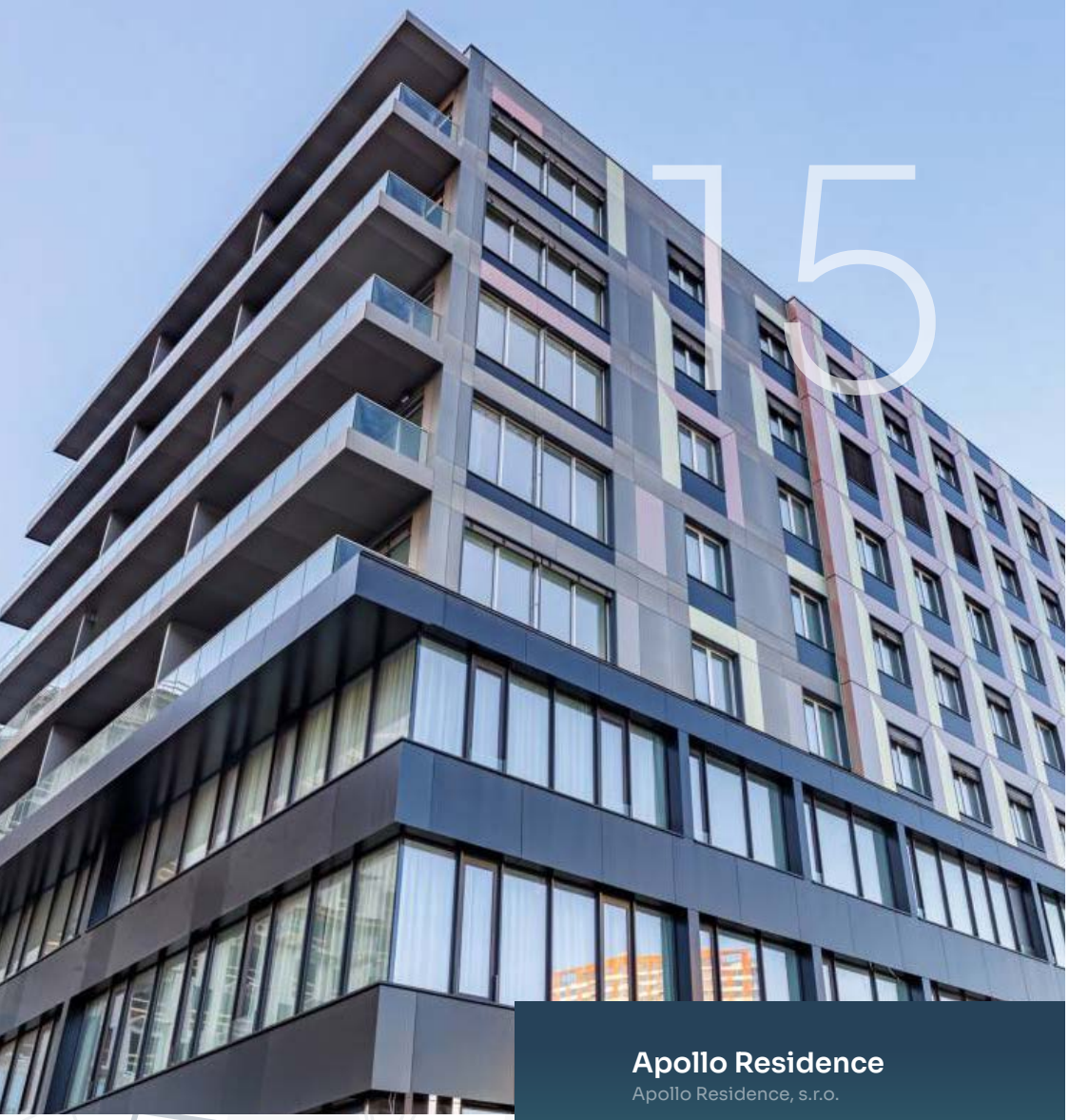
J&T Real Estate

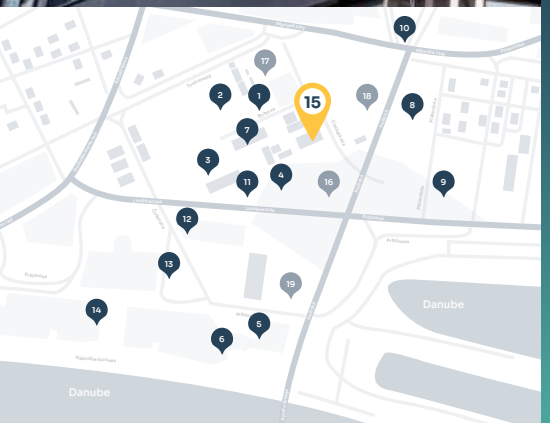
NUMBER OF UNITS
254

COMPLETION DATE
2006 - 2010

AVERAGE SALES PRICE
7,000 – 9,000 €/m²

SECONDARY MARKET
Approx. 2 units for sale
Approx. 5 units for rent





Apollo Residence

Apollo Residence, s.r.o.

NUMBER OF UNITS
80

COMPLETION DATE
2021

AVERAGE SALES PRICE
5,681 €/m²

SECONDARY MARKET
approx. 10 units for sale
and 1 unit for rent

Upcoming projects

upcoming

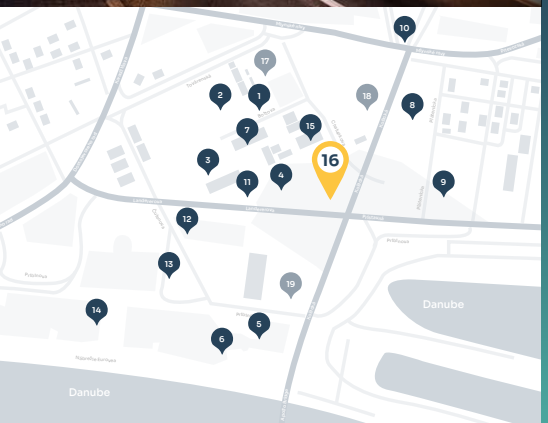


16

upcoming

PORTUM TOWERS

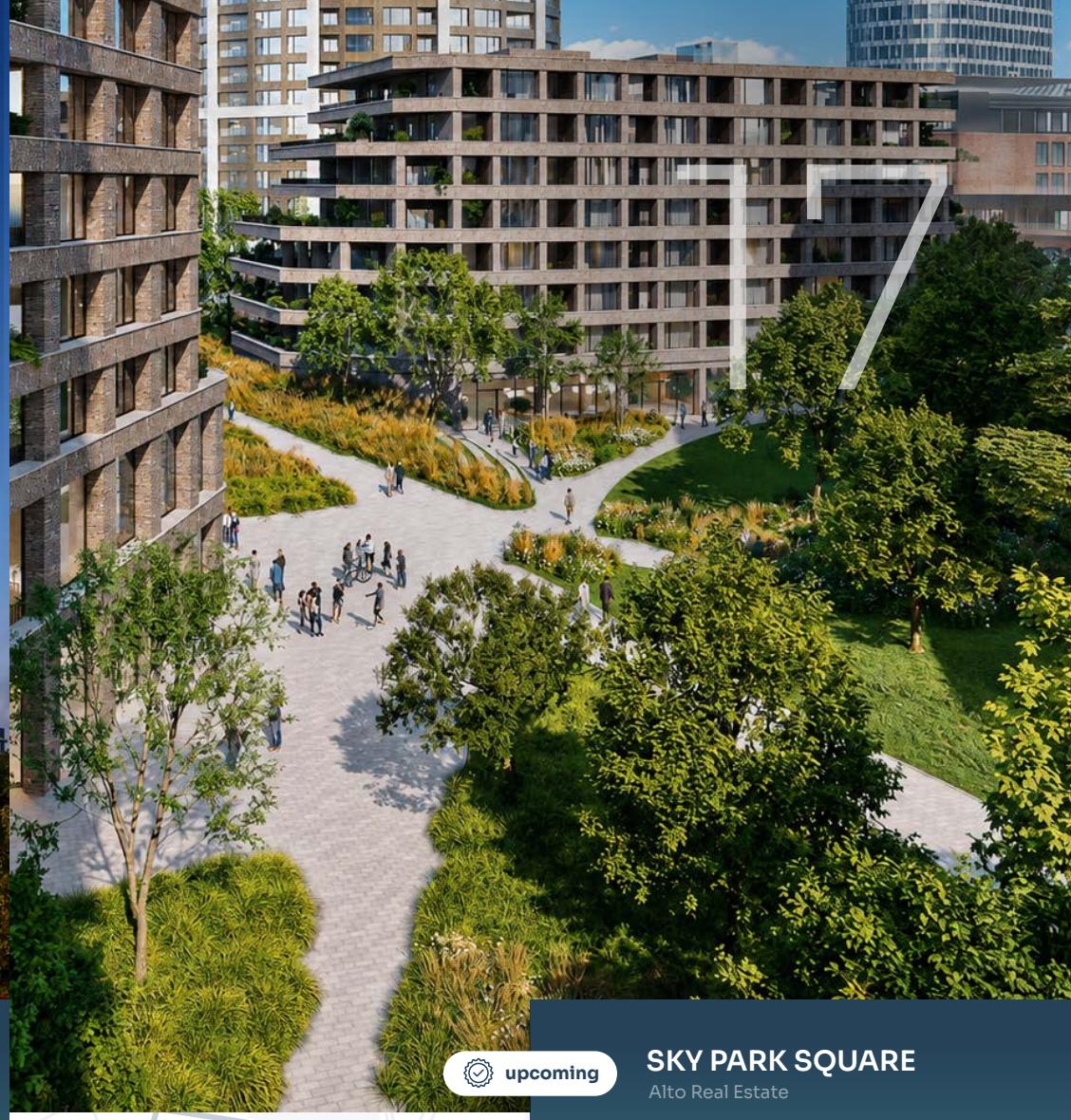
Top Estates Group s.r.o.



NUMBER OF UNITS
518

COMPLETION DATE
not specified

FUNCTION
Residential, Retail

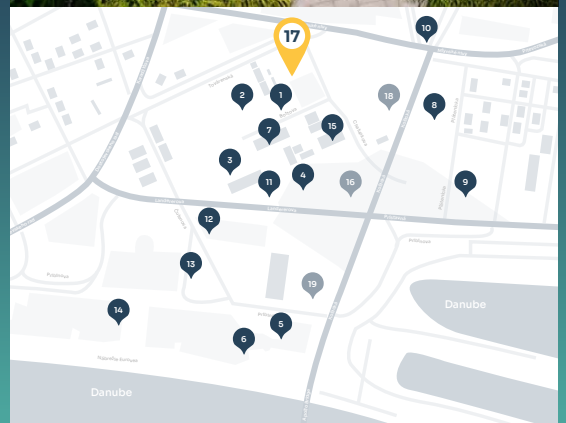


17

upcoming

SKY PARK SQUARE

Alto Real Estate



NUMBER OF UNITS
354

COMPLETION DATE
2027 - 2031

FUNCTION
Residential, Offices, Retail

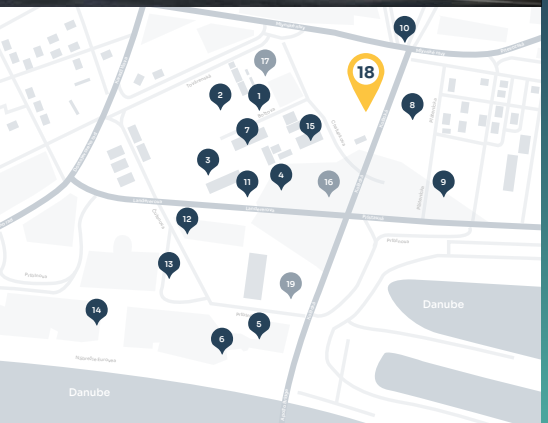


18

upcoming

CHALUPKOVA

Penta Real Estate



NUMBER OF UNITS
1,300

COMPLETION DATE
2026 – 2034

FUNCTION
Residential, Offices, Retail

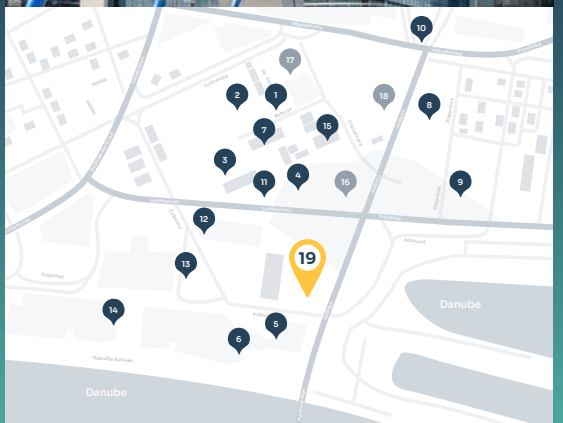


19

upcoming

EAST TOWER

J&T Real Estate



NUMBER OF UNITS
500

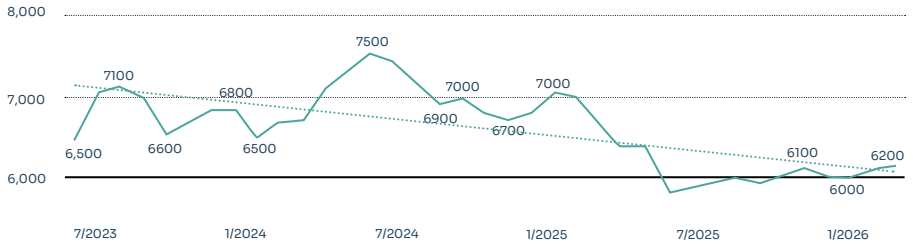
COMPLETION DATE
2028 – 2032

FUNCTION
Residential, Offices

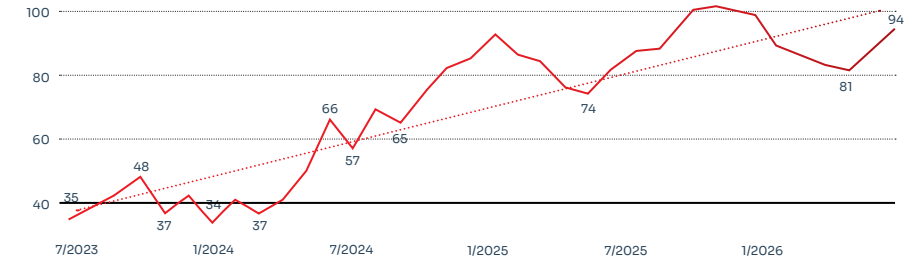
Secondary sales

- The average price on the secondary market in the downtown fell from its peak of approx. **7,500 €/m² (2024) to 6,000 – 6,200 €/m² (2026).**
- The number of listings grew from approximately **35 – 50 per month to 80 – 95 per month.**
- The most commonly achievable price range in quality projects is **6,500 – 8,000 €/m².**
- Smaller apartments reach **7,500 – 8,500 €/m².**
- Premium projects and views still achieve above-average prices, especially **Eurovea** Tower, Eurovea Riverside, Klingerka and the upper floors of Sky Park.
- Larger apartments are more price-sensitive, with a wider price spread **(from 5,500 €/m²)**.

Average price EUR/m² by category



Number of listings at the end of the month by category



Commentary

The secondary market in the downtown is today substantially more competitive than in the past. A growing number of listings puts pressure on prices, and sellers can no longer automatically expect a premium for location alone. Buyers have a wider choice among projects such as **Metropolis, Sky Park, Zwirn, Eurovea Tower, Eurovea Riverside, Klingerka or Downtown Yards**, and therefore compare price, floor area, floor, view, condition of furnishings and parking availability more.

Price behaviour of the market

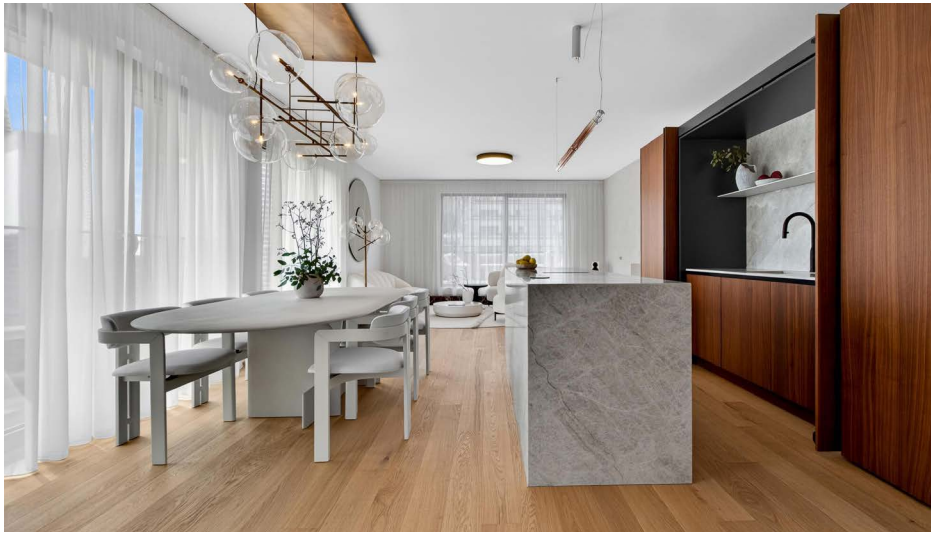
The table shows that quality listings in the downtown most commonly range approximately in the band of **6,500 – 8,000 €/m²**. The highest prices are held mainly by smaller apartments, higher floors and premium projects with views, for example Sky Park, Metropolis, Zwirn or Eurovea Tower. For smaller apartments, unit prices are often higher because the absolute price remains relatively affordable for the buyer.

Conversely, larger apartments or apartments without a clear advantage in the form of a view, layout or premium standard are more price-sensitive. For these apartments, buyers compare alternatives more closely, and a difference of a few hundred euros per m² can decide whether a listing gets into real demand.

Growing supply changes the negotiating position

The key signal in the chart is not the fall in the average price itself, but a combination of two trends: **prices are slipping or flat while listings keep growing.**

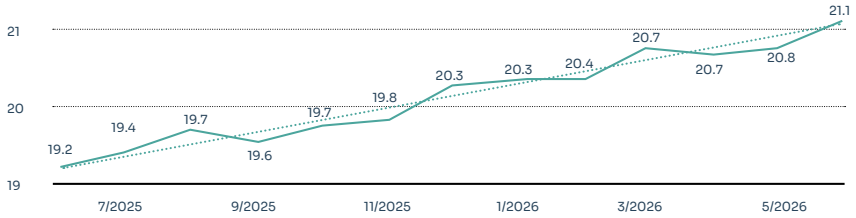
This means the market is no longer clearly in the seller's favour. With more similar apartments in the same location, buyers behave more selectively. They choose not only by address but by the specific value of the apartment. This makes correct pricing at launch more important.



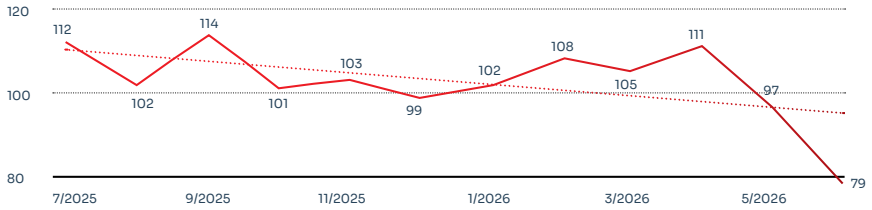
Rentals

- Average rent in the downtown rose from approx. **19.2 €/m²/mo. (2025) to 21.1 €/m²/mo. (2026).**
- The number of active listings fell from approx. **100 – 114 offers to 79 offers.**
- The standard benchmark for a quality downtown apartment is approx. **18 – 23 €/m²/mo.**
- Premium apartments reach **25 – 33 €/m²/mo.**
- The most liquid are **1- and 2-room apartments.**

Average price EUR/m² by category



Number of listings at the end of the month by category



Commentary

Rentals in Bratislava's downtown show **price growth alongside a decline in the number of active listings** over the past year. This is the opposite of secondary sales, where supply grew and prices came under pressure. In rentals, the chart shows demand absorbing supply faster, with the market shifting in landlords' favour.

1. Average rent is rising

The average rent rose, per the chart, from approx. **19.2 €/m²/mo. in mid-2025** to approx. **21.1 €/m²/mo. in June 2026.** An increase of about **10% over 12 months.** This indicates that the downtown still has strong absorption capacity in rentals. The area benefits from the concentration of offices, services, retail, gastronomy and from demand from expats, managers, employees of international firms and more creditworthy tenants.

2. The number of listings is falling

The number of active listings in the observed period mostly ranged around **100 – 114 offers**, but towards the end of the period it fell to approximately **79 listings.** This means that despite the high price level, the available supply is shrinking. This development supports the interpretation that quality apartments in the downtown are rented out relatively quickly, especially if they are priced correctly, furnished and have parking or a view.

3. The strongest rent band is approximately 18 – 23 €/m²/mo.

The listings table shows that common quality 2- and 3-room apartments in the projects **Metropolis, Sky Park, Eurovea, Klingerka** most often range approximately in the band of **18 – 23 €/m²/mo.**
This band can be considered the basic benchmark for a standard quality apartment in a new-build in the downtown.

4. Premium rents reach 25 – 33 €/m²/mo.

The highest rents are achieved mainly by smaller apartments, apartments on higher floors, apartments with a view and premium addresses such as **Eurovea Tower, Eurovea Riverside and selected apartments in Metropolis.**
The table shows listings, for example, at the level of **28 – 33 €/m²/mo.** for smaller or premium-located apartments. This confirms that a tenant is willing to pay a premium, but only for clear value: a view, a higher floor, a new standard, furnishings, parking or a prestigious address.

5. Smaller apartments are the most liquid

1- and 2-room apartments achieve higher prices per m² because they have a lower absolute monthly price and a broader target group. In Metropolis, for example, 1-room apartments are listed in the table at approximately **23 – 29 €/m²/mo.**
For investors, this means that smaller apartments in the downtown have better liquidity and often also a better yield per m².

6. Larger apartments have a higher absolute price, but lower liquidity

3- and 4-room apartments achieve high monthly rents, often **1,500 – 3,700 €/mo.,** and more for exceptional apartments. However, their target group is narrower. For larger apartments, furnishings, parking, view, layout and the overall feel of the apartment therefore play a bigger role.

The rental market in the downtown is currently **stronger than the sales market.** Rents are rising, the number of available listings is falling and quality apartments retain high liquidity. The greatest demand is for smaller and medium-sized apartments in new-builds, ideally furnished, with parking and a view. The downtown thus remains **one of the most profitable and most stable locations for residential rental in Bratislava.**

Conclusion

- Bratislava's downtown is emerging as **the strongest and most promising residential location in Bratislava.** Over the past few years, it has grown from a former development zone into a full-fledged urban market with a high concentration of housing, offices, services, retail, gastronomy and public spaces. It is precisely this combination that creates a long-term foundation for stable demand for both purchase and rental.

- On the side of new and upcoming projects, the downtown remains the most active part of the city. After successfully completed projects such as **Eurovea, Sky Park, Klingerka, Zwirn and Metropolis** comes the next wave of projects — **Downtown Yards, Ister Tower, Sky Park Tower, Ganz House, Eclair and VEO.** This pipeline confirms developers' confidence in the location and at the same time further strengthens its urban character.

- The secondary market shows that the downtown already functions as a standalone market with its own rules. Buyers compare more than in the past, but quality apartments still hold a strong position. In particular, apartments with a good view, an efficient layout, a higher floor, parking or a premium address can justify an above-average price. Common quality listings range mainly in the band of approximately 6,500 – 8,000 €/m², while premium units reach higher levels.

- A very positive signal comes from the rental market. The average rent in the observed period increased from approximately **19.2 €/m²/mo. to 21.1 €/m²/mo.**, while the number of active listings fell to approximately **79 listings.** This confirms that the downtown has strong absorption capacity and quality apartments are rented even at a higher price level.

- From an investment perspective, the location remains very attractive. The best performers are mainly smaller and medium-sized apartments, which have a broader target group, a lower absolute price and high liquidity.
  Larger apartments also have strong potential, especially exceptional products with a view, a terrace, above-standard furnishings or a premium address.

- In the coming years, we expect the downtown to keep its position as **the most premium urban residential location in Bratislava.** The growing supply of new projects is professionalising the market and raising the quality of competition, which benefits the overall value of the location. The sales market will be more selective, but quality products will retain demand. The rental market should stay strong, supported by the concentration of jobs, services and urban life.

Sources

- www.sledujbyty.sk
- real estate portals nehnutelnosti.sk, reality.sk and topreality.sk
- www.herrys.sk
- project websites

Disclaimer

The information and data contained in this brochure are for informational purposes only and were prepared on the basis of information available at the time of its preparation, in particular from publicly available sources, official registers and documents provided by the relevant institutions and other external entities. HERRYS accepts no responsibility for the correctness, completeness, timeliness or any inaccuracies of data originating from these sources.

HERRYS



HERRYS has been one of the leading real estate agencies on the Bratislava residential market for more than 15 years. During this period we have brokered thousands of successful deals, participated in the sale of more than 2,200 apartments in development projects and carry out approximately 400 transactions every year. We cooperate long-term with leading developers, investors and individual clients, and our activities cover the entire life cycle of residential real estate – from the pre-sale of new projects to secondary sales and rentals. Since the beginning of the formation of Bratislava's downtown we have been an active part of it. We have participated in the sale of apartments in several significant residential projects and to this day we represent buyers, sellers and investors in this location every day. Thanks to this, we are able to follow market developments not only during the sale of new-builds, but also after their completion, when they enter the secondary market or become investment properties.

Over the years we have built our own database of market data, which we continuously expand and update. We monitor the development of prices, supply and demand, the sales pace of individual projects, the development of the rental market, and the behaviour of buyers and investors, as well as other indicators that influence property values. We regularly analyse this data, compare it with historical development and supplement it with insights gained from daily contact with the market. This publication emerged as a natural result of our long-term work. It is built on a combination of our own data, publicly available information, market monitoring and practical experience gained directly in the sale of real estate in Bratislava's downtown. Its aim is to provide an objective view of the development of one of the most important residential locations in Slovakia and to offer a quality basis for decision-making by clients, investors and professionals active in the real estate market.

www.herrys.sk

BRATISLAVA — 2026

DOWN TOWN

HERRYS

HERRYS
Bottova 4
811 09 Bratislava

+421 2 20 86 88 66
+421 948 217 888
info@herrys.sk

www.herrys.sk

Information contained in this material was prepared on the basis of available public sources, third-party data, real estate portals, developers' websites, publicly available price lists and internal market observation. Despite efforts to achieve the highest possible accuracy and timeliness, the completeness, correctness and timeliness of all stated data cannot be guaranteed.

Prices, numbers of available apartments, completion dates, floor areas, sales conditions and other project parameters may change continuously and may differ from the data available at the time this material was prepared. The data presented are therefore for informational and analytical purposes only and cannot be regarded as a binding offer, a guarantee of the selling price, an investment recommendation, or a legal or expert opinion.

The preparer of this material accepts no responsibility for any inaccuracies, omissions or changes in data provided by third parties, or for decisions made on the basis of this material without further individual verification. Before any commercial, investment or legal decision, we recommend verifying the timeliness and correctness of the data directly with the relevant developer, seller, real estate agency or other relevant entity.