

# Q2 2022



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**PREHĽAD TRHU NOVÝCH BYTOV  
NEW APARTMENTS MARKET OVERVIEW  
BRATISLAVA**

# TRH NOVÝCH BYTOV NEW APARTMENTS MARKET OVERVIEW Q2 2022, BRATISLAVA

## SUMÁR

- Ponuka dlhodobo klesá aj napriek tomu, že medzikvartálne narástla o 21,3 %
- Počet predaných bytov sa medzikvartálne znížil o 13,5 % (Q2 vs Q1 2022) a medziročný pokles dosiahol 44 % (Q2 2022 vs Q2 2021)
- Ceny pokračovali v raste, medzikvartálne stúpili o 2,78 % a medziročne stúpili o 18,55 %

## ÚVOD

Bratislavský trh sa už nejaký čas správa rozdielne oproti trhom v západnej Európe. Napríklad v porovnaní s trhom v Nemecku, kde na rast ponuky a pokles dopytu reagoval trh stagnáciou cien, je u nás situácia taká, že na jednej strane sa štatisticky ochladzuje dopyt, na druhej strane ceny aj naďalej rastú. Obdobne však reaguje trh aj v USA. Tento stav pripisujeme najmä nedostatku kvalitnej ponuky, čo potvrdzuje rýchle tempo predaja bytov v projektoch, ktoré sú na začiatku predaja.

## PONUKA

Na konci druhého štvrťroku sa ponuka sústreďovala v 68 projektoch a predstavovala 1588 bytov. Medzikvartálne sa teda ponuka zvýšila o 251 bytov, ale v medziročnom porovnaní klesla o 496 bytov.

Časť z projektov, ktoré v predchádzajúcom období pozastavili predaj, ho v uplynulom kvartáli opätovne spustila. Do ponuky pribudlo 7 projektov s celkovým počtom 684 bytov.

## SUMMARY

- The supply has been decreasing for a long time, even though it grew by 21.3 % quarter-on-quarter
- The number of sold apartments decreased by 13.5 %, (Q2 2022 vs Q1 2022) and by 44 % year-on-year (Q2 2022 vs Q2 2021)
- Prices continued to grow, they rose by 2.78 % quarter-on-quarter and by 18.55 % year-on-year

## INTRODUCTION

The Bratislava market has been behaving differently in comparison to markets in Western Europe for some time. For example, the market in Germany, responded to the increase in supply and the decrease in demand by stagnating prices, the situation in Slovakia is such that, on the one hand, demand is statistically cooling, on the other hand, prices continue to rise. However, the market here also reacts similarly like in the USA. We attribute this situation mainly to the lack of quality of supply, which is confirmed by the fast pace of sales of projects which are in the early stages of sales.

## SUPPLY

At the end of the second quarter, the supply was concentrated in 68 projects and represented by 1588 apartments. The supply has increased by 251 apartments quarter-on-quarter but decreased by 496 apartments year on year.

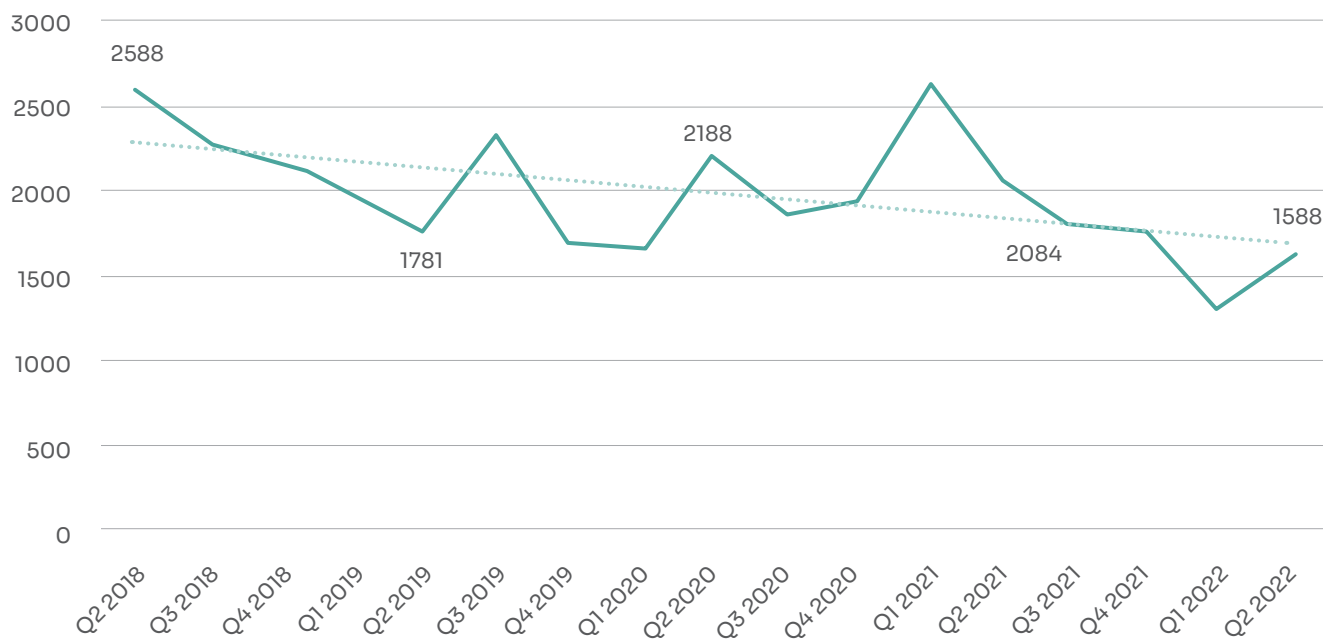
Some of the projects that had suspended sales in the previous period were restarted in the past quarter. Seven projects with a total number of 684 apartments were added to the supply.



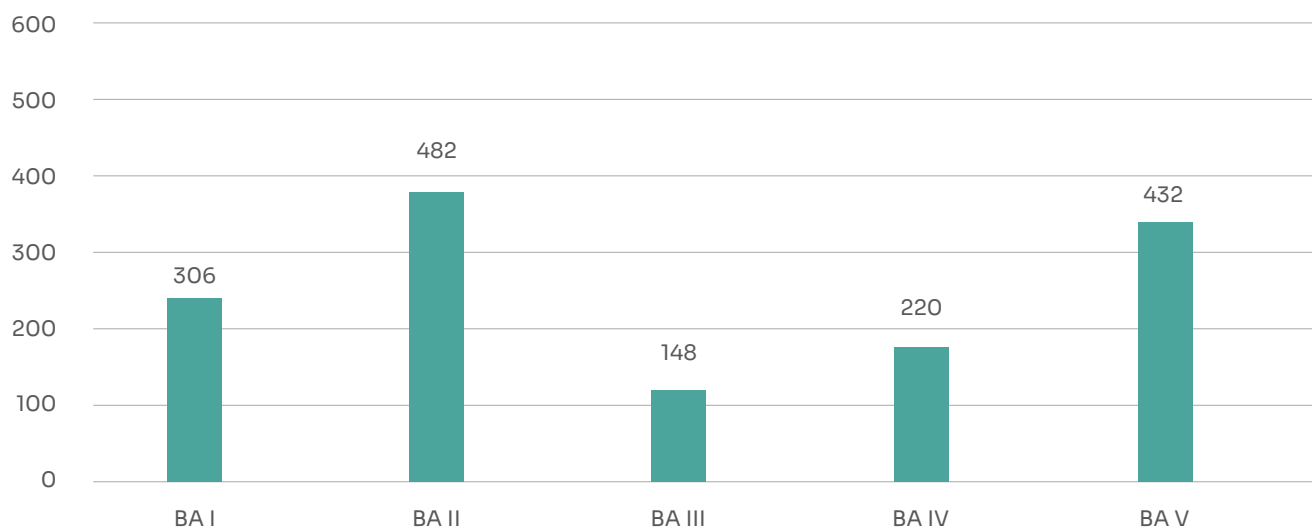
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## Voľné byty v ponuke Unsold apartments in supply



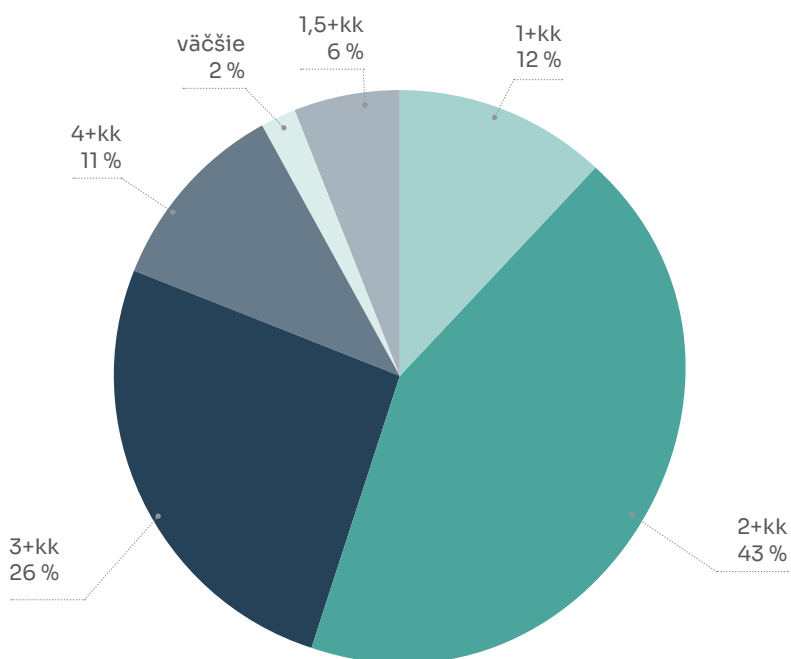
## Ponuka nových bytov podľa okresov New apartments supply in Bratislava districts



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## Podiel ponuky nových bytov podľa kategórie / New apartments' mix in supply



### DOPYT

Počas uplynulého kvartálu sa predalo 567 bytov, čo znamená 2,78 bytu na projekt mesačne. V uplynulom štvrtroku sa vypredali 3 projekty. Desať projektov nezaznamenalo žiadny predaj.

Projekty, ktoré spustili predaj v druhom kvartáli, predali celkom 212 bytov, čo je 31 % z ich celkového počtu. Toto tempo je tak 3-krát vyššie ako tempo predaja bytov v starších projektoch.

Prvých 30 % bytov z ponuky projektu sa predáva tempom 10 bytov mesačne/projekt. Posledných 15 % ponuky bytov v projekte sa predáva tempom 3 byty mesačne/projekt.

Najviac bytov sa predalo v druhom bratislavskom okrese, pričom sa v ňom však predalo o 32,5 % bytov menej ako v prvom štvrtroku. Jediný okres, v ktorom sa predalo medzikvartálne viac bytov bol BA I (o 10,9 %).

### DEMAND

During the past quarter, 567 apartments were sold, which means 2.78 apartments per project per month. In the past quarter, 3 projects were sold out. Ten projects did not record any sales.

Projects that launched sales in the second quarter sold a total of 212 apartments, which is 31% of their total number. This rate is 3 times higher than the rate of sale of flats in older projects.

The first 30% of apartments from the project supply are sold at a rate of 10 apartments per month/project. The last 15% of the supply of apartments in the project is sold at the rate of 3 apartments per month/project.

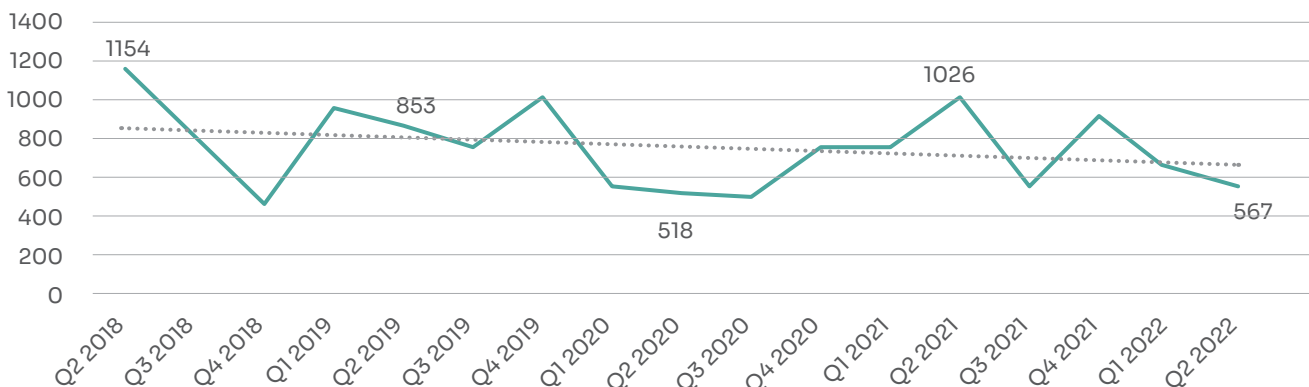
Most apartments were sold in the second Bratislava district, although 32.5% fewer apartments were sold there than in the first quarter. The only district in which more apartments were sold quarter-on-quarter was BA I (by 10.9%).



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## Dopyt po bytoch / Number of sold new apartments



## CENY

Priemerná cena bytov v projektoch dosiahla úroveň 3.802,- EUR/m<sup>2</sup> bez DPH. Najvyššia priemerná cena je tradične v BA I, kde atakuje 5.700,- EUR/m<sup>2</sup> bez DPH. Zvyšné mestské časti majú cenovú hladinu v rozmedzí 3.400 – 3.750,- EUR/m<sup>2</sup> bez DPH.

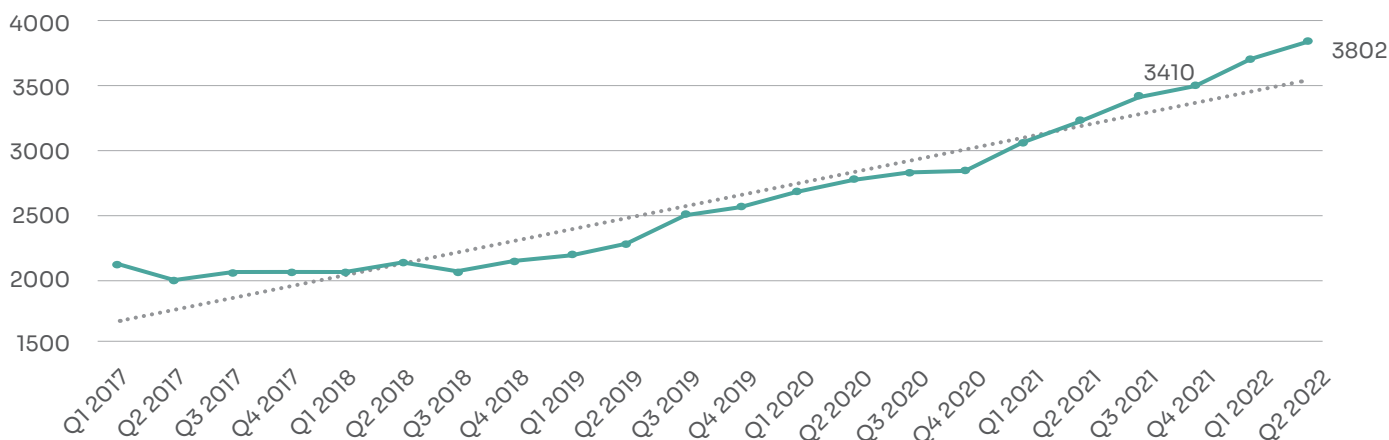
Priemerný jednoizbový byt v Bratislave II stojí 167 tisíc EUR. Priemerný dvojizbový byt v Bratislave V stojí 244 tisíc EUR. Priemerný trojizbový byt v Bratislave III stojí 356 tisíc EUR. Priemerný štvorizbový byt v Bratislave IV stojí 493 tisíc EUR.

## PRICES

The average price of apartments in the projects reached the level of EUR 3,802/m<sup>2</sup> without VAT. The highest average price is traditionally in BA I, where it costs EUR 5,700/m<sup>2</sup> without VAT. The remaining urban areas have a price level between 3,400 – 3,750 EUR/m<sup>2</sup> without VAT.

An average one-room apartment in Bratislava II costs EUR 167,000. An average two-room apartment in Bratislava V costs EUR 244,000. An average three-room apartment in Bratislava III costs EUR 356,000. An average four-room apartment in Bratislava IV costs EUR 493,000.

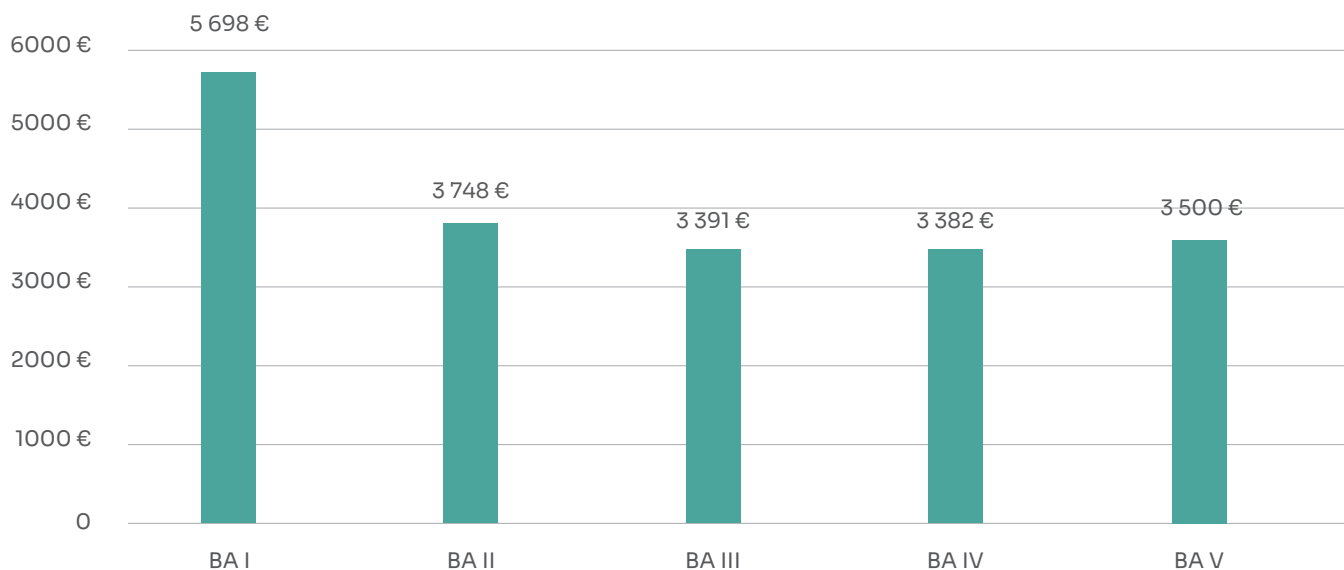
## Ceny nových bytov v Bratislave za 5 rokov / New apartments' prices in last 5 years



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## Priemerná cena za m<sup>2</sup> bez DPH Average apartment price Eur/sqm ex VAT



### PROGNÓZA

S ohľadom na všetky makroekonomické okolnosti predpokladáme, že súčasný trend bude pokračovať aj v nasledujúcom kvartáli. Nová ponuka bude pribúdať najmä v nových etapách existujúcich projektov alebo na sekundárnom trhu, avšak dlhodobý trend klesania ponuky bude pokračovať.

Dopyt bude ovplyvňovaný okrem kvality a veľkosti ponuky aj dostupnosťou financovania a dominovať v ňom budú investičné nákupy.

Ceny by mali ďalej rásť, aj keď sa prípadne zníži záujem zo strany kupujúcich, hoci len jednociferným tempom. Potenciál na to majú všetky okresy Bratislavy.

### FORECAST

Taking into account all macro-economic circumstances, we assume that the current trend will continue in the next quarter as well. New supply will increase mainly in new stages of existing projects or on the secondary market, but the long-term trend of decreasing supply will continue.

In addition to the quality and size of the offer, demand will also be influenced by the availability of financing and will be dominated by investment purchases.

Prices should continue to grow, even if there is a possible decrease in interest from buyers, albeit only at a single-digit pace. All districts of Bratislava have the potential for this.



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## HERRYS

Realitná kancelária HERRYS je fullservisová realitná agentúra zameraná na rezidenčné nehnuteľnosti a developerské projekty. V roku 2021 predala 433 rezidenčných nehnuteľností v objeme 78 miliónov Eur. Vďaka spätnej väzbe z predaja a pravidelnému prieskumu trhu je schopná robiť poradenstvo pre developerov, ktorého účelom je nastavenie projektov podľa aktuálneho dopytu a trendov v otázkach skladby bytov, výmer, štandardného vybavenia a cenotvorby. Prieskumy trhu sú vydávané od roku 2011, na kvartálnej báze. Od tohto roku sme odkonzultovali viac ako 100 projektov a 10.000 bytov. **Za posledných 6 mesiacov sme odkonzultovali 10 projektov s viac ako 1.800 bytmi v nich a v každom sme boli schopní odporučiť úpravy, ktoré znamenali zvýšenie využitia čistej predajnej plochy, marketingového potenciálu a zvýšenie výnosov, až o viac ako 10 %.**

## HERRYS

HERRYS Real Estate Agency is a full-service real estate agency focused on residential real estate and development projects. In 2021, Herry's has sold 433 residential properties in the amount of EUR 78 million. Thanks to sales feedback and regular market research, it is able to provide advice to developers, the purpose of which is to set projects according to current demand and trends in terms of apartment composition, area, standard equipment and pricing. Market surveys have been published since 2011 on a quarterly basis. Since this year, we have consulted more than 100 projects and 10,000 apartments. **In the last 6 months, we have consulted 10 projects with more than 1,800 flats in them, and in each we have been able to recommend adjustments that have meant an increase in net sales area, marketing potential and revenue growth of up to more than 10 %.**

### Výhradný predajca projektov Exclusive projects seller



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Najväčšia klasická realitná kancelária

<b>SME</b> Ekonomika	<b>1. miesto</b>	<b>20</b>
<b>SME</b> Ekonomika	<b>2. miesto</b>	<b>21</b>



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