



GLOBAL CITIES

RETAIL GUIDE

2026 EDITION

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BRATISLAVA OVERVIEW

Bratislava with its population of 478,000 is the largest city in Slovakia and the economic backbone of the economy with the highest purchasing power in Slovakia. It is home to many government agencies, as well as many domestic and international companies.

The Bratislava region is the wealthiest and economically most important region in Slovakia, comprising an active daily population of more than 650,000 daily including visitors and commuters.

Bratislava has attracted many international retailers who entered the market through one of the main shopping malls across the city (Aupark, Eurovea, Nivy and Avion). High street stock in Bratislava is rather limited focusing mainly on restaurants and cafés. Main high street retail corridors are located along Hviezdoslavovo Square, and the Main Square in the Old Town supplemented by further opportunities in the triangle of Michalska, Laurinská and SNP Square.

Obchodná Street, the former major high street now focuses more on lower end brands and food segment.

Vydrlica, a redeveloped historical district under the Bratislava castle has completed its first phases and provides new high street opportunities.

Despite shoppers in Slovakia and Bratislava being more aspirational than in many western countries, the relatively small number of tourists and the proximity to Vienna located just 50 km west of the city, limits the market from establishing a notable luxury retail segment. Those luxury and up-market brands that are present in the city tend to cluster in Aupark Shopping Center and Eurovea with few exceptions in the Old Town.



BRATISLAVA

Key Retail Streets & Areas

TRIANGLE LAURINSKA/ MICHALSKA/ SNP SQUARE

The retail evolution of the Old Town Triangle has been slow as the more affluent shoppers from Bratislava have tended to do their luxury shopping in Vienna or in Aupark and Eurovea shopping centers.

Laurinska Street still accommodates a number of monobrand shops such as Marco Mirelli, Max Mara, Liska and a few multi-brand shops with brands such as Givenchy, Balmain, Chloe, Moncler, Lanvin, Off-white, Vetements, Elisabetta Franchi, TwinSet, and Chiara Boni

The Old Town Triangle between streets Laurinska, Michalska and SNP Square is mostly occupied by F&B concepts, bars and nightlife entertainment, complement by souvenirs, several local slow fashion or design brands.

AUPARK, EUROVEA, NIVY MALL

Aupark Shopping Center, the most luxurious scheme in the city together with Eurovea on the other bank of the Danube are naturally two schemes attracting new high end brand entries.

Nivy Mall anchored by the Main Bus Terminal has become the most visited convenience shopping mall in the City Business District targeting mostly service providers and convenience brands with focus on mass market. It has become also an attractive market entry destination due to its footfall. It has the largest food hall in the city.



BRATISLAVA

Market Overview

KEY AREAS/ STREETS/ SHOPPING CENTRES	CONSUMER PROFILE	MAJOR RETAILERS PRESENT	TYPICAL RENT FOR 200 SQM UNIT	RANGE OF UNIT SIZES
Aupark	Mass market and upmarket brands	Zara & Inditex brands, Peek & Cloppenburg, H&M, Mango, Terranova, Reserved, Humanic, Intersport, Starbucks, Lindex, Estee Lauder, Victoria’s Secret, Calvin Klein	€55 – 85 sqm/month	20 – 5,000 sqm
Eurovea	Mass market and upmarket brands	Peek & Cloppenburg, H&M, Cos, New Yorker, Sports Direct, Desigual, Mango, Guess by Marciano, Armani Jeans, Gant, Starbucks, Nespresso, Iqos, BOSS, HUGO, Primark	€50 -70 sqm/month	30 – 4,000 sqm
Nivy	Mass market	Zara & Inditex brands, Peek & Cloppenburg, Mango, LPP brands, Humanic, Intersport, Starbucks, Lindex	€45 – 50 sqm/month	20 – 5.000 sqm
Avion	Mass market	Zara & Inditex brands, Peek & Cloppenburg, H&M, C&A, Reserved, Intersport, Sports Direct, Mango, Tezenis, Quiksilver	€45 – 50 sqm/month	30 – 3,000 sqm
Bory Mall	Mass market	Alain Delon, Calzedonia, H&M, Gant, C&A, DH Stores, Mohito, LPP brands, Sports direct	€35 – 50 sqm/month	30 – 4,000 sqm
VIVO	Mass market	H&M, Biotech, Bballtown, Cinema City, Golem	€20 – 40 sqm/month	20 – 3,000 sqm
Laurinska street	Luxury	Max Mara, Marco Mirelli	€55 sqm/month	30 - 200 sqm

BRATISLAVA

Shopping Centres

AUPARK

Aupark Bratislava (65,000 sqm) is the most premium shopping center in the city located on the Danube bank close to the largest residential district of Petržalka. Thanks to its premium redevelopment, Aupark represents the main target for upmarket retailers considering the market entry.

The shopping centre opened in 2001, was extended in 2007, partially refurbished in 2015 and in 2024 extended by another 10,000 sqm mostly for selected Inditex portfolio brands flag-ships. It attracts the most affluent shoppers in Bratislava supplemented by mass market from the neighbouring Petržalka District.

EUROVEA

Eurovea is a large shopping center (85,000 sqm) at the confluence of Old Town and City Business District on Danube river bank, one of the two premium shopping centers in Bratislava. Its famous promenade is perceived as the strongest F&B location in Slovakia. In the last few years, several new stores from the luxury brand sector have opened on the first floor of Eurovea. Eurovea is attracting many tourists due to its proximity to the Old Town and its visitors. After its extension in 2023, Eurovea became the largest shopping centre in Slovakia with 85,000 sqm of retail area including the restaurants on the riverbank.

AVION

Avion is currently the largest shopping area in Slovakia in terms of GLA (103,000 sqm), of which 40,000 sqm is represented by IKEA and it includes several retail parks and stand-alone retailers. The mall is in the Eastern part of Bratislava with good connections to the highway D and the airport. Since opening, Avion shopping park has been extended twice. The tenant mix includes most of the brands already represented in the Slovak market, and it is targeting mostly commuting shoppers visiting IKEA and focuses more on mass market shoppers.



BRATISLAVA

Shopping Centres

NIVY MALL

Nivy Mall is the newest (2021) shopping center in Bratislava (70,000 sqm) anchored by the Main Bus Terminal and as a result it is attracting the highest footfall among all shopping centers focusing on mass market, services and convenience stores.

It is located in the heart of the City Business District and as a result it has become a service hub for office workers and commuters. It comprises the largest food hall in the city, the largest Alza showroom and many convenience stores and cafés. Fashion segment is also represented supplementing the overall offer.

BORY MALL

Bory Mall completed in 2015 (55,000 sq m) is the only major shopping center in the Bratislava IV district in the north-western part of Bratislava. It is a key development and footfall maker of commercial zone Bory between Lamač and Devínska Nová Ves including also standalone retailers and showrooms.

It is focusing on mass market including a large offer of services, fashion brands and food concepts for visitors from the neighbouring residential districts from a large catchment area.

VIVO

VIVO (formerly Polus) was the first shopping center in Bratislava opened in 2000.,

It is now functioning as a mass market local convenience shopping hub focusing on mass market and basic needs. . It is currently undergoing a major renovation of its concept into larger units.

Located in the middle of the residential district and surrounded by sport facilities and stadiums it provides potential of large local footfall focusing on convenience.



BRATISLAVA OVERVIEW

Food & Beverage

Despite Slovakia’s food and beverage market being dominated by local operators, more international brands are entering the market each year. There are hundreds of food and beverage outlets catering for all tastes and budgets. Starbucks, Burger King, Pizza Hut, KFC, McDonald’s and Koykan are all growing their portfolios.

Slovak cuisine is very popular in typical restaurants such as pubs and in Bratislava’s flagship restaurants.

In recent years, several new fine dining restaurants have opened, usually offering Italian, Mediterranean or French cuisine. It would be wrong to not mention Ukrainian concepts such as Chernomorka or Lviv Croissants.

Street food concepts and Pan Asian cuisine is also becoming very popular. The well performing local gastro group

Medusa has already expanded abroad and currently operates more than 24 restaurants in Bratislava, Czech republic and UAE.

Drinking coffee with a small breakfast is one of Bratislava’s most cherished traditions, largely a legacy of its centuries-long history as part of the Austro-Hungarian Empire. Not only are there many traditional cafes in Bratislava, but a number of chains have opened, including Julius Meinl, McCafes, Starbucks, Jungle Roastery and Aida.

In the last few years there has been a boom of local bakeries and specialty coffees concepts popping up in both new and old schemes widening the food and beverages offer further.

Bratislava has 3 main locations for food and beverage outlets: the first is traditionally the Old Town, the second is on the promenade of the Danube River, which is part of Eurovea shopping mall and third, very fast growing and developing City Business District.

KEY AREAS	CONSUMER PROFILE	FOOD & BEVERAGE OPERATORS	RENT FOR 350 SQM UNIT
Old Town	Mass & upmarket	Kogo, Rio, Primi, El Gaucho, Mondieu, Isai, D.Steak House, Urban Bistro, Narbon	€35 - 55 sqm/month
Eurovea	Mass & upmarket	Wagamama, Primi, Kolkovna, Al Faro, Mc Donalds, KFC, Konn, Los Capolitos, Nordsee, Sajado, Starbucks	€45 - 50 sqm/month
Nivy	Mass	Vapiano, Bombay Express, McDonalds, KFC, Mondieu, Konn, Chilantro	€40 - 45 sqm/month
Aupark	Mass & upmarket	KFC, BurgerKing, Bombay Express, EL&N London, Starbucks, Kubu, Soho, Pizza Hut, McDonalds	€45 - 50 sqm/month



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BRATISLAVA

Saturation

ANALYSIS OF COMPARATIVE RETAIL DEVELOPMENT IN CEE CAPITALS

Compared to other CEE capitals, Bratislava has more than twice the area of retail space per inhabitant than Prague, Budapest and Warsaw. This is mostly caused by the absence of standard high-street in Bratislava comparing to other CEE capitals.

Various retail opportunities shows up within the CBD area in office, residential or mixed-use project developments.

Saturation (Shopping Centre GLA per 1,000 inhabitants)

