



**Modern industrial stock Romania**  
(sqm)

**8.3 M**



**Pipeline Q3-Q4 2025**  
(sqm)

**300,000**



**Vacancy rate Romania**  
(%)

**4.4%**



**Vacancy rate Bucharest**  
(%)

**5.1%**

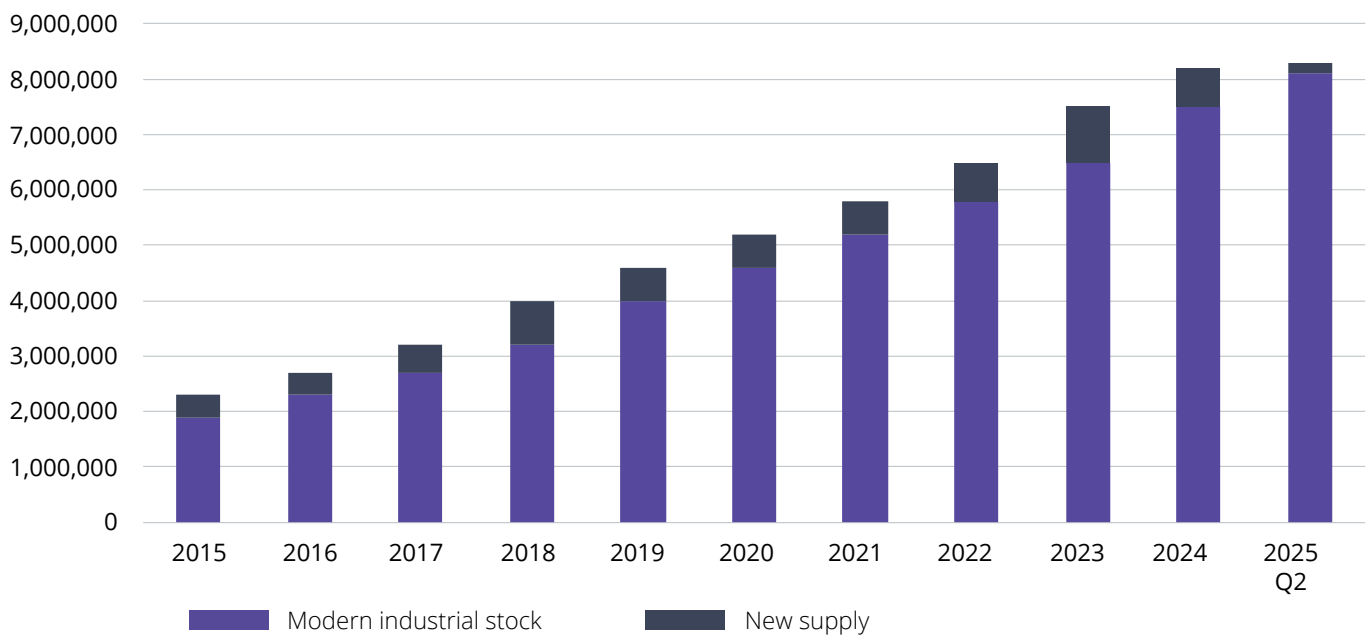
Industrial stock and pipeline

With ~100,000 sqm delivered in Q2 2025, (two thirds in Bucharest area), the modern industrial and logistic stock in Romania rose to 8.3M sqm. There is a ~300,000 sqm announced pipeline for the remainder of the year (80% in Bucharest area), and already building up a significant pipeline for 2026.

The industrial and logistic sector in Romania has been persistently growing and performing very well, and this is attributable to the fact that, regardless of the situation, goods need to be produced and stored, as well as to the accentuating nearshoring trend.

The general vacancy rate in Romania dropped to 4.4% (almost a historical low) from 4.7% last quarter, while in the Bucharest area it witnessed a slight increase to 5.1%.

Modern industrial stock evolution (sqm)

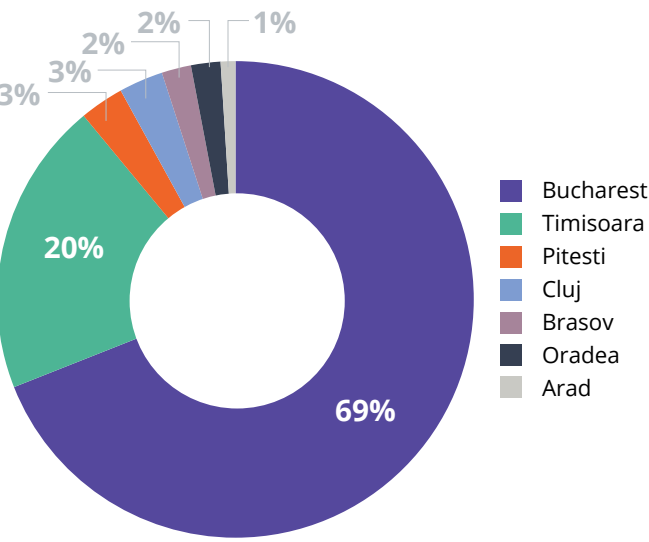


Industrial demand

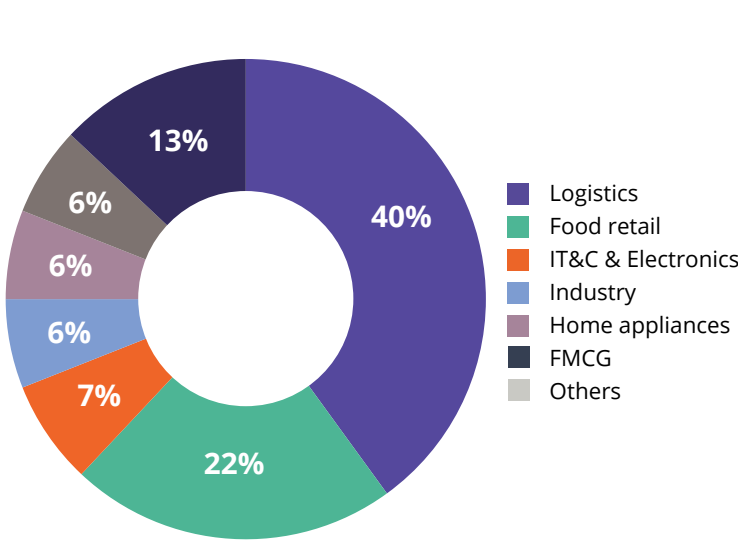
In the second quarter of 2025, the total leasing activity (gross take-up) overpassed 310,000 sqm - a record quarter since Q1 2023. This amounts to 530,000 sqm for the first half of 2025 and, considering that usually more transactions are closed in the second half of the year, this puts the logistic sector on course to delivering a very strong take-up performance this year, possibly on par with the record year 2022 – when the gross take-up reached 1.2M sqm.

Same as in the first quarter, the logistic sector generated 40% of the demand. Overall, in the first half of 2025, the large food retail companies generated 15% of the demand, and industrial companies another 10%. Other sectors generating significant demand are FMCG, IT&C&Electronics, couriers, home appliances, packaging and fashion companies.

Gross take-up by geography in Q2 2025




Gross take-up by business sector in Q2 2025



Occupancy costs


Although the prime industrial/logistic rents remained stable during the quarter, ranging between €4.5–4.75/sqm/month, the increase in taxes, as well as possible inflation risk puts upward pressure on the occupancy costs, and we may see slight increases in the near future.

The rents have been on an increasing trend since 2023, however they are still the lowest in the CEE region.



**Prime headline rent**  
(€/sqm/m)

**€4.5-4.75**




**Incentives discount**  
(%)

**5%**



**Usual contract length**  
(years)

**5-10**



**Service Charge**  
(€/sqm/m)

**€0.8-1.25**

Highways and regional industrial and logistics hubs, Romania



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