


**Modern industrial stock Romania**  
(sqm)

**8.3 M**




**Pipeline Q2-Q4 2025**  
(sqm)

**500,000**



**Vacancy rate Romania**  
(%)

**4.7%**



**Vacancy rate Bucharest**  
(%)

**4.8%**

Industrial stock and pipeline

The modern industrial and logistic stock in Romania exceeded 8 million sqm last year, however, compared to the other CEE countries (Poland, Czech Republic, Hungary, Croatia), there is still the lowest density of industrial stock per capita – hence – plenty room to grow. With circa 100,000 sqm delivered in the first quarter of 2025, the stock currently stands at 8.3M sqm.

There are close to 500,000 sqm in the pipeline – to be delivered by the end of 2025. Around 70% should be delivered in Bucharest area. Other targeted industrial hubs are Craiova, Iasi, Constanta, Oradea. As we forecasted in our previous reports, the developers and occupiers are now branching out to tertiary hubs (like the cities above), which, until recently, were barely on the logistic and industrial map.

Modern industrial stock evolution (sqm)



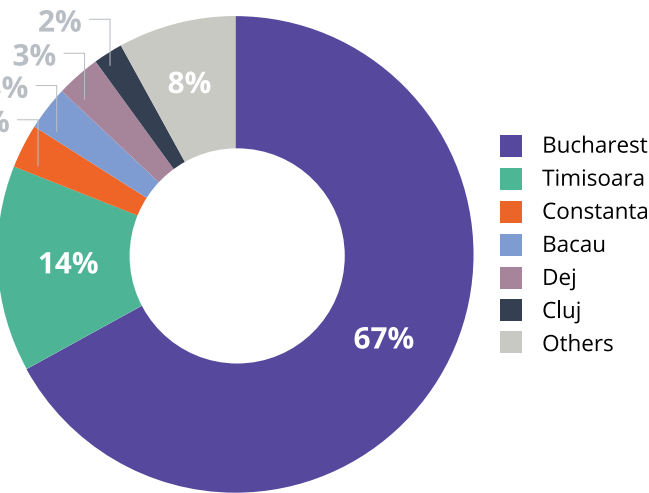
Industrial demand

The total industrial leasing activity in the opening quarter of 2025 amounted to cca 235,000 sqm, in line to cca 253,000 sqm in Q1 2024. In terms of geographical distribution, Bucharest and Timisoara comprised the vast majority of the demand.

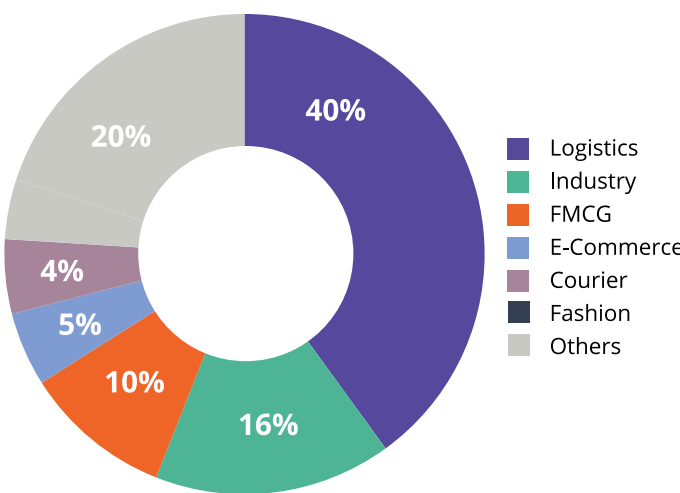
The logistic sector made a comeback in this first quarter, generating 40% of the demand (after it decreased to only 7% during 2024). The industrial companies are consistently generating demand (after 14% during the whole 2024, in this quarter they comprised 16% of the demand).

If historically, the industrial market in Romania was tilted towards a tenants’ market, recently it starts to lean towards a landlords’ market due mainly to low vacancy rates in most of the industrial hubs.

Gross take-up by geography in Q1 2025



Gross take-up by business sector in Q1 2025



Occupancy costs

The occupancy costs remained stable since the last quarter. The prime rents are at €4.5-4.75/sqm/month, on a slight ascending trend since 2023. The construction costs are expected to remain relatively stable, therefore the rent increases in 2025 should be marginal, if any.

The incentives granted by landlords are on a decreasing trend – at around 5%, compared to 10-15% one year ago. Service charges (covering expenses such as building maintenance and insurance and property tax) are on a slight ascending trend, in the area of €0.85-1.25 per sqm per month.



**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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