



Modern industrial stock Romania (sqm)

8.5 M



Pipeline Q4 2025 (sqm)

200,000



Vacancy rate Romania (%)

4.7%



Vacancy rate Bucharest (%)

4.4%

## Industrial stock and pipeline

There were ~100,000 sqm new industrial supply delivered in Q3 2025, which brings the total modern industrial and logistic stock in Romania to 8.5 million sqm. 46% are located in Bucharest area. Other important industrial hubs are Timisoara (10%), Brasov (7%) and Ploiesti (6%).

There is a ~200,000 sqm announced pipeline for the last quarter of the year (70% in Bucharest area), and already building up a significant pipeline for 2026.

The continued expansion of the industrial stock reflects the resilience of Romania's logistics market, supported by nearshoring, e-commerce growth, and ongoing infrastructure upgrades such as the A0 and A7 highway projects.

Modern industrial stock evolution (sqm)



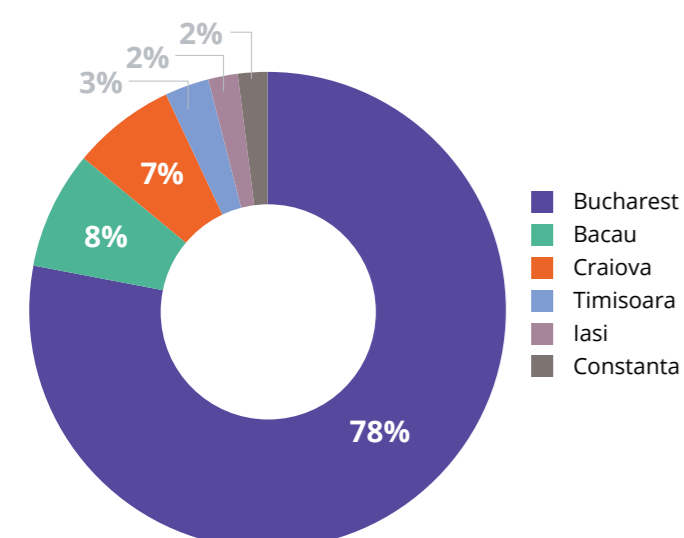
## Industrial demand

In the third quarter of 2025, the total leasing activity (gross take-up) was in the area of 220,000 sqm, amounting to 750,000 sqm for the first 3 quarters of 2025. This signals another year with strong demand, in line with the last 5 years when the gross take-up was around 1 million sqm. Same as in the first 2 quarters of 2025, the sector which generated the most demand in Q3 was the logistics sector, with 47%, while home appliances contributed 14% and industry with 10%.

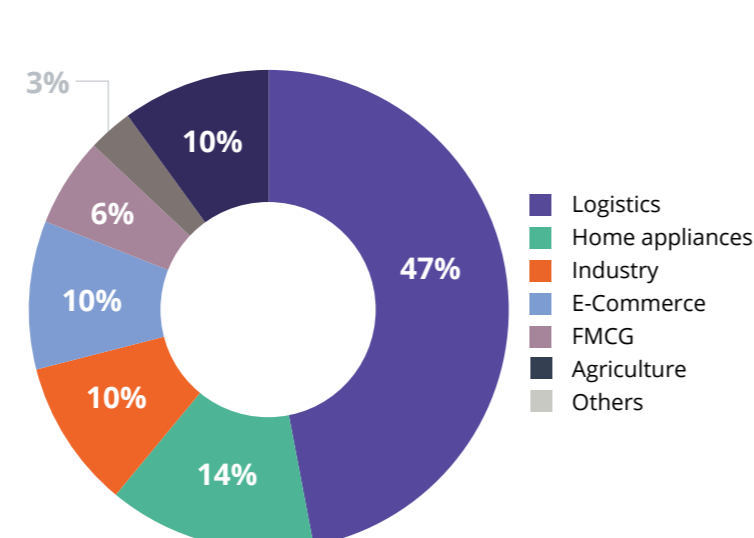
Overall, in the first 9 months of the year, the logistics sector leads clearly the demand with 41%, followed by industry (10%), food retail (10%), home appliances (7%), FMCG (7%) and IT&C&Electronics (4%).

Due to the high leasing volume in Bucharest area in the last quarters, the vacancy in Bucharest decreased abruptly and is now below the vacancy rate at national level.

Gross take-up by geography in Q3 2025



Gross take-up by business sector in Q3 2025



## Occupancy costs

The prime headline industrial/logistic rents withstood a slight increase, up to 4.75/sqm/month. This represents a 3% increase year on year.

Service charges of €0.95-1.3 per sqm per month apply (covering expenses such as building maintenance and insurance and property tax). Due to increase in property taxes, the total service charges registered a 7% increase year on year.



Prime headline rent (€/sqm/m)

€4.75



Incentives discount (%)

5%



Usual contract length (years)

5-10



Service Charge (€/sqm/m)

€0.95-1.3

## Highways and regional industrial and logistics hubs, Romania



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