Romania industrial market

Q3 2026

Modern industrial stock Romania (sqm)	Pipeline Q4 2026 (sqm)	Vacancy rate Romania (%)	Vacancy rate Bucharest (%)
9.06 M	150,000	5.0%	4.9%

Industrial stock and pipeline

9 million sqm and counting: Romania's modern industrial stock crossed this milestone in the third quarter, reaching approximately 9.06 million sqm after around 110,000 sqm of new deliveries. Around 60% was in the Bucharest area, which holds 47% of the total stock, followed by Timisoara (10%), Brasov (7%) and Ploiesti (6%).

The announced pipeline for the last quarter of 2026 amounts to roughly 150,000 sqm, with its vast majority concentrated in Bucharest. The general vacancy rate edged down to 5.0% at national level, while in Bucharest it remained stable at 4.9%. Vacancy remains within a comfortable range for the market and well below average levels in other CEE countries.

Romania's motorway and expressway network has passed 1,477 km. The now continuous A7 link from Bucharest to Bacau helps the development of Bacau industrial market, while the operational southern arc of the A0 underpins demand in southern Bucharest. The northern A0 arc should close by year-end, and A7 towards Pascani in 2027. Forecasts point to roughly 190 km of new motorway in 2026, taking the network to around 1,600 km.

Modern industrial stock evolution (sqm)

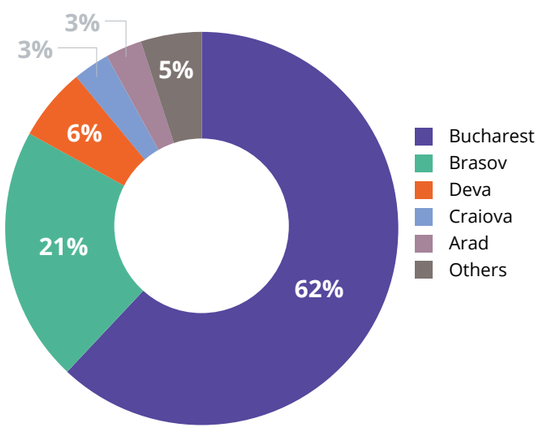
Industrial demand

Gross take-up in the third quarter of 2026 reached approximately 240,000 sqm. On a cumulative basis, leasing activity over the first nine months came in at around 790,000 sqm, roughly 5% above the same period of 2025 and consistent with full-year volumes in the range of 1.1–1.3 million sqm.

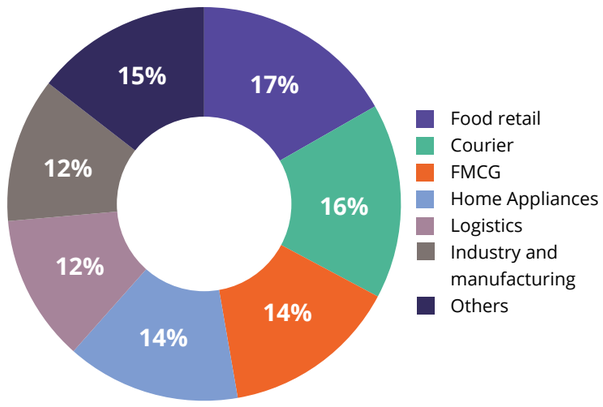
Bucharest accounted for 62% of quarterly leasing volume, followed by Brasov (21%), Deva (6%) and Craiova (3%). Food retail companies generated the most demand (17%), followed by courier companies (16%), FMCG (14%), home appliances (14%), logistics operators (12%) and industry and manufacturing (12%). The remaining demand was split across pharma, IT&C & electronics, e-commerce and other sectors.

Leasing demand continues to be underpinned by the structural nearshoring trend, e-commerce expansion and the ongoing development of courier and last-mile networks. Expansions by existing occupiers accounted for around 30% of Q3 activity, pointing to continued confidence from the occupier side.

Gross take-up by geography in Q3 2026



Gross take-up by business sector in Q3 2026



Occupancy costs

Prime headline rents for industrial and logistics space stood at €4.75/sqm/month at the end of Q3 2026, unchanged for a fourth consecutive quarter. Over the past years rents have risen by close to 19%, from approximately €4.00/sqm/month in 2020, reflecting the progressive tightening between demand and available stock.

Service charges remain stable, typically ranging between €1.00 and €1.30/sqm/month. Romania continues to offer the most competitive occupancy costs for modern logistics space in the CEE region.

Prime headline rent (€/sqm/m)	Incentives discount (%)	Usual contract length (years)	Service Charge (€/sqm/m)
€4.75	5%	5-10	€1-1.3

Highways and regional industrial and logistics hubs, Romania

For more information please contact our industrial team:

David Canta
Principal
Romania & Czech Rep.
david.canta@avisonyoung.com
+40 727 737 893

Mihai Berbece
Senior Consultant
Industrial Agency, Romania
mihai.berbece@avisonyoung.com
+40 740 229 606

Levis Vlad
Head of Research, Romania
levis.vlad@avisonyoung.com
+40 744 333 631

Andrei Kivu
Senior Data Analyst, Research Romania
andrei.kivu@avisonyoung.com
+40 744 481 955

For the latest updates, visit us on Linkedin!

©2026 Avison Young [Commercial Property Services SRL]. All rights reserved.

E&OE: The information contained herein was obtained from sources which we deem reliable and, while thought to be correct, is not guaranteed by Avison Young. All opinions expressed and data provided herein are subject to change without notice. This report cannot be reproduced, in part or in full, in any format, without the prior written consent of Avison Young Inc.