

INDUSTRIAL PROPERTY MARKET

REPORT Q4/2025

ROMANIA

INDUSTRIAL MARKET IN ROMANIA Q4 2025

Romania's Industrial Land Market 2025: Stable Growth Amid Political and Fiscal Uncertainty



8 mil sq m
TOTAL STOCK



250,000 sq m
NET TAKE-UP



500,000 sq m
UNDER
CONSTRUCTION



4,5 – 4,75 EUR
AVERAGE RENTS



5 %
VACANCY RATE



140,000 sq m
PREMISES
DELIVERED

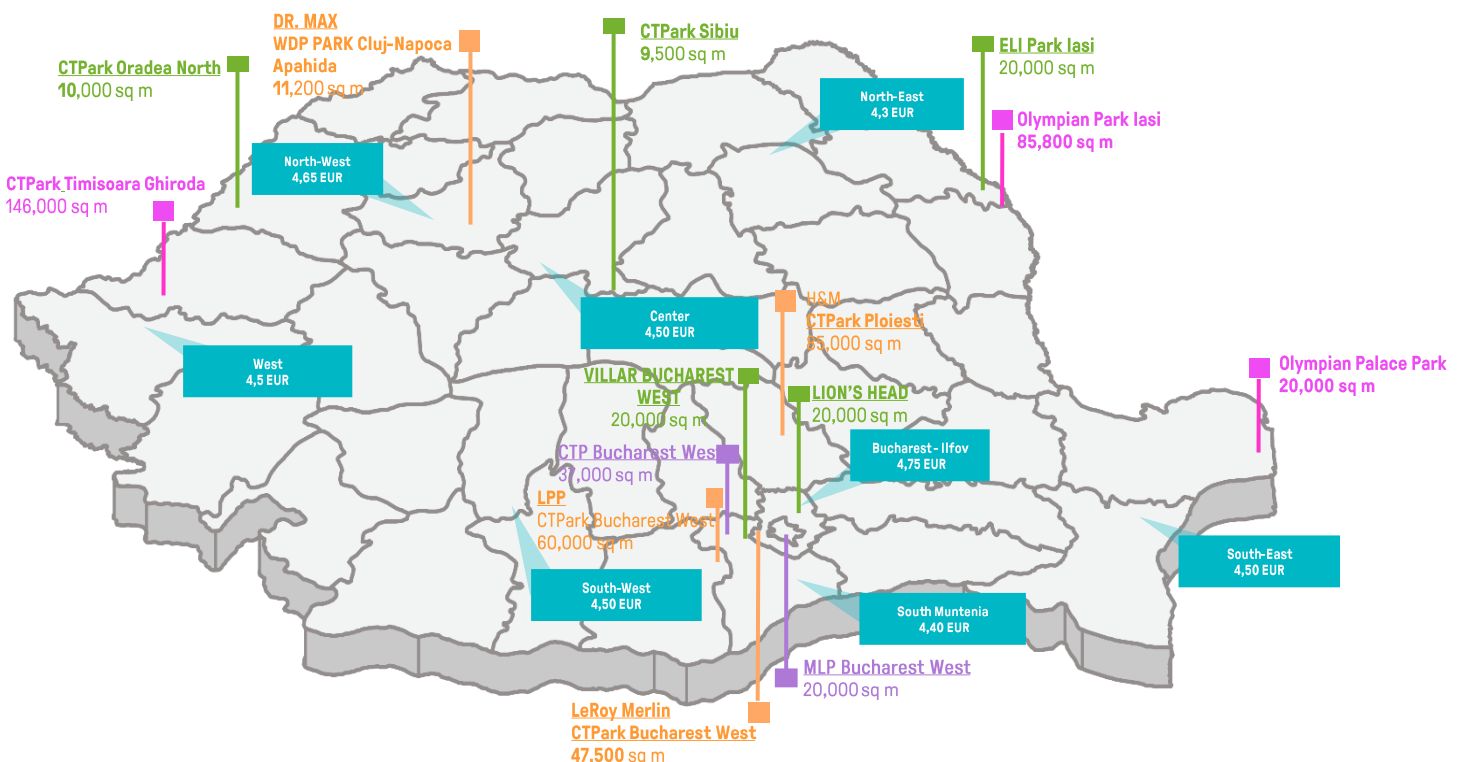
The Romanian industrial sector demonstrated notable resilience and selective growth in the fourth quarter of 2025 amid ongoing global economic uncertainties and evolving regional supply chain dynamics. The year concluded with transaction volumes comparable to 2024, totalling close to EUR 450 million. This performance was achieved despite political uncertainty and ongoing fiscal adjustments. This underscores sustained interest from occupiers in expanding logistics and industrial operations, despite ongoing local and global macroeconomic volatility, while also reflecting continued market consolidation.

Leasing activity remained heavily concentrated in Bucharest, which accounted over 70% of total take-up in 2025 and continued to represent tenants' primary target market. Timișoara ranked second, with around 75,000 sqm leased, reaffirming its position as Romania's second-largest logistics hub.

By sector, retail, e-commerce, and FMCG occupiers were the most active, securing 430,000 sqm, followed by logistics operators with over 200,000 sqm and courier companies with 80,000 sqm.

SELECTION OF TRANSACTIONS AND RENTS

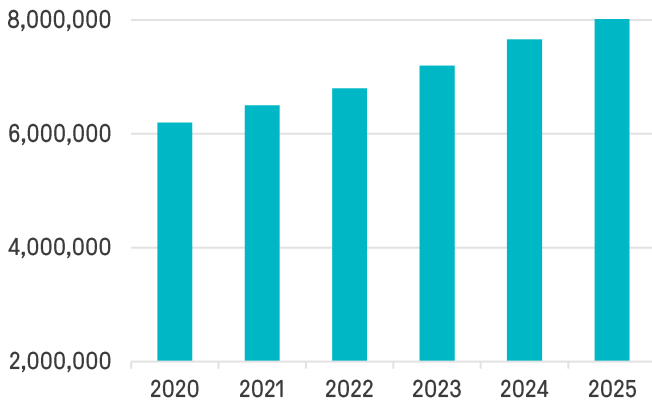
■ SIGNIFICANT TRANSACTION ■ UNDER CONSTRUCTION ■ COMPLETED CONSTRUCTION ■ PLANNED CONSTRUCTION



Demand remains focused on high-quality industrial assets, particularly Class A warehousing, logistics platforms, and built-to-suit facilities, which continue to achieve premium rents. The industrial and logistics real estate market is expanding at a solid pace, supported by growing requirements from the defence, renewable energy, and raw materials sectors across Romania and Europe. Key regional hubs such as Cluj, Timișoara, Arad, Iași, and Brașov are strengthening their position as prime industrial investment destinations due to improving infrastructure and competitive advantages.

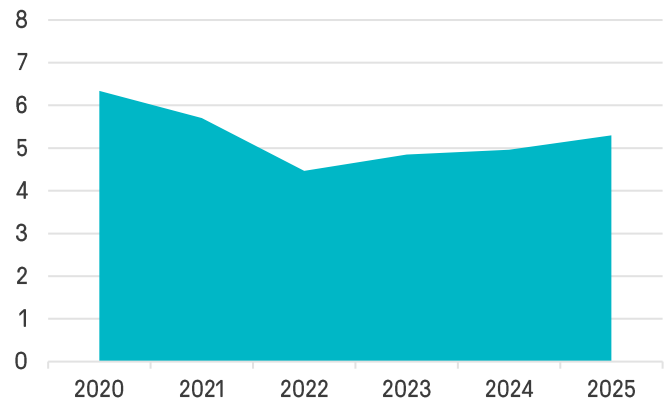
Q4 2025 saw several landmark leasing transactions, including Fan Courier Group (33,000 sqm) at WDP Park Bucharest Ștefănești, Leroy Merlin (47,500 sqm) and LPP (60,000 sqm) at CTPark Bucharest West, reinforcing strong occupier demand for modern large-scale facilities.

TOTAL STOCK IN SQ M



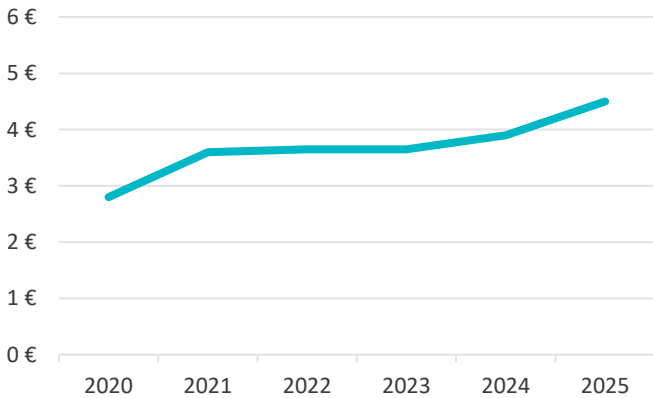
Source: IO Partners Research

VACANCY RATE %



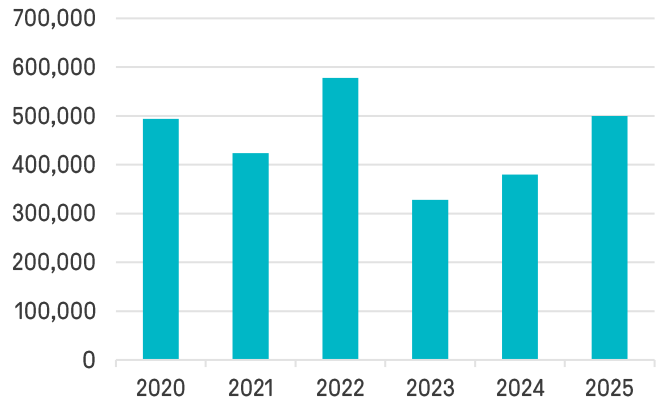
Source: IO Partners Research

AVERAGE RENTS – EUR/SQ M



Source: 108 Real Estate Romania

GROSS TAKE-UP IN SQ M



Source: IO Partners Research

“In Q4 2025, Romania’s industrial and logistics market demonstrated continued resilience, supported by sustained occupier demand and a clear preference for established hubs. Leasing activity reflected a cautious but strategic expansion approach, as companies prioritized efficiency, consolidation, and long-term operational stability amid ongoing macroeconomic uncertainty.

Expanded highways reduce travel times between major logistics hubs and borders (e.g., Hungary, Ukraine, Moldova), making Romania more attractive for distribution, manufacturing and logistics investments.

Market trends show rising demand for specialized industrial and logistics space, especially in key hubs and established centers. Companies must prioritize locations with connectivity, scalability, and skilled labour access, while developers focus on tenant needs and securing land for future growth.

Overall, the quarter closed with a positive outlook, reinforcing the market’s attractiveness for both occupiers and developers.

VICTOR RACHITA
Managing Partner





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