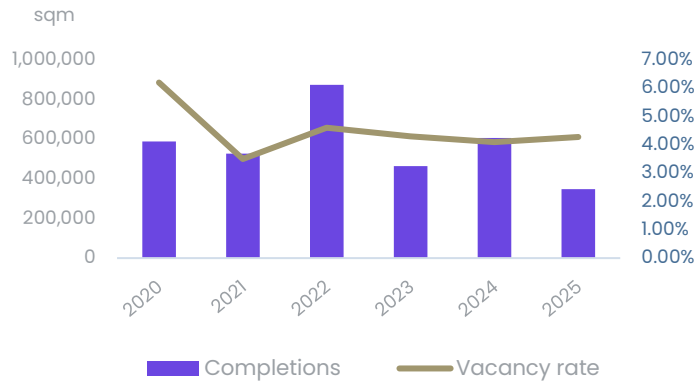


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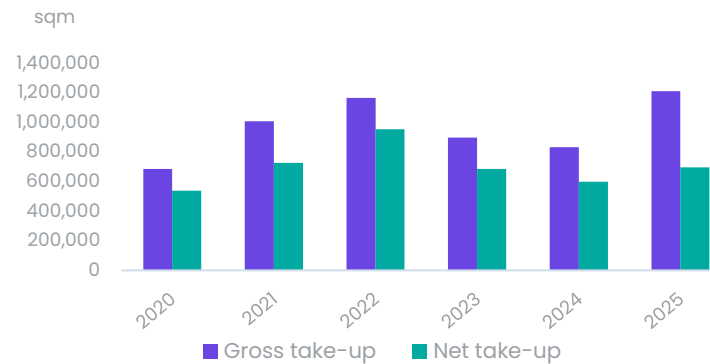


## Deliveries reached the lowest level of the past 6 years

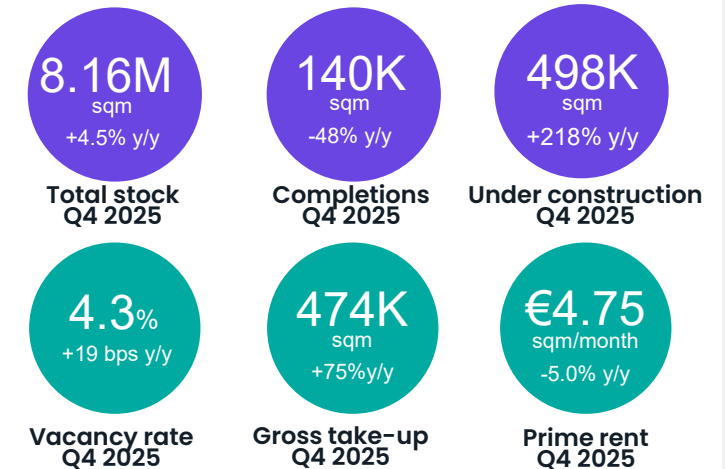


## Gross take-up surpassed 1.2 million sqm in 2025

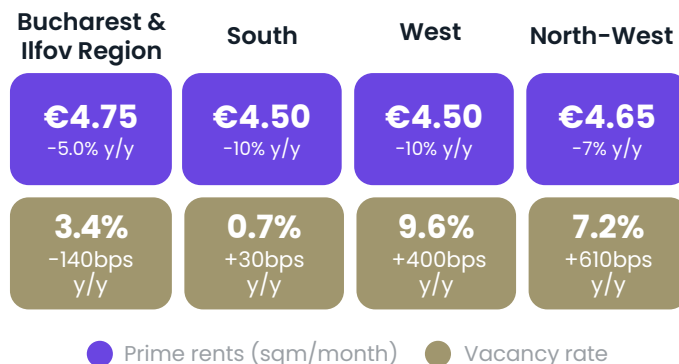
Net take-up reached almost 700,000 sqm in 2025



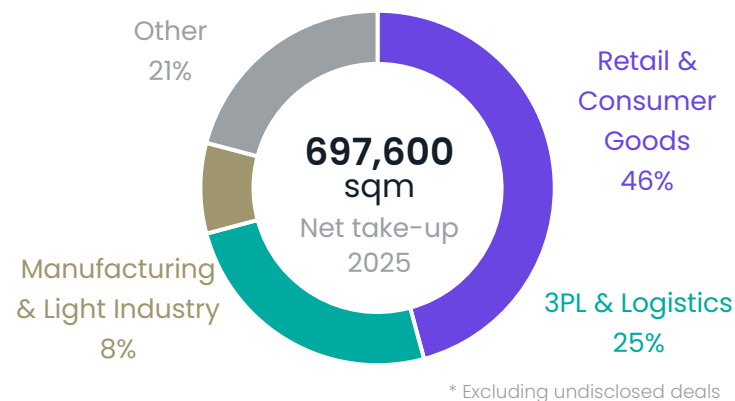
## 0.5 million sqm under construction



## Prime rents remained at €4.75



## Retail & 3PL dominated net demand in 2025\*



“Romania’s industrial sector continues to outperform expectations, reaching a new record high in gross take-up in 2025. As the modern stock expands and competition intensifies, vacancy remains at low levels. Looking ahead, we expect developers to show increased confidence in 2026.”



Costin Bănică, Head of Industrial, Energy & Land Development, iO Partners Romania

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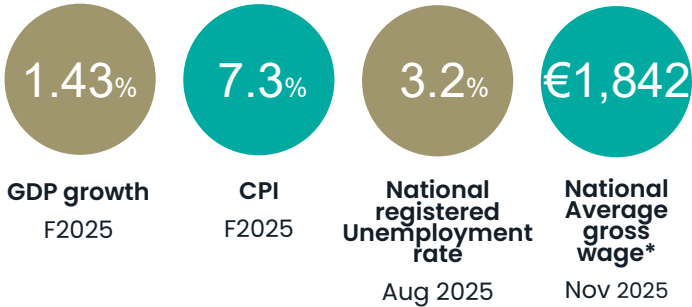
Q4/2025



## Q4 2025 key transactions

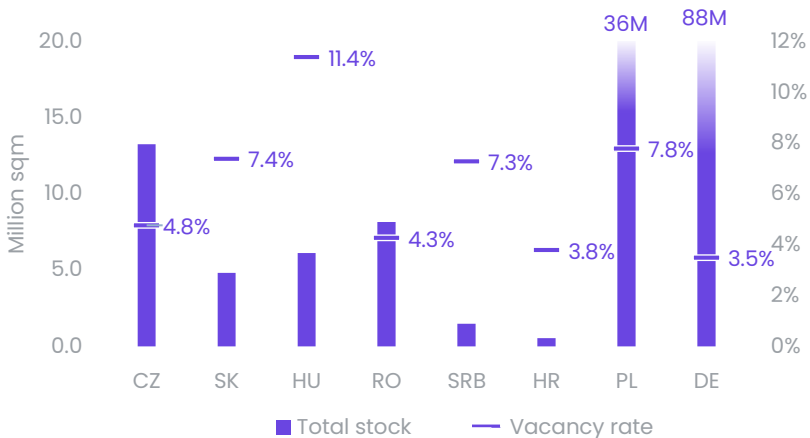
Logistic park	Region	Tenant	Sector	Type of deal	Total size (sqm)
P3 Bucharest A1	Bucharest-Ilfov	Confidential	Retail & Consumer Goods	Renewal	84,500
CTPark Bucharest West	Bucharest-Ilfov	Leroy Merlin	Retail & Consumer Goods	Pre-lease & expansion	62,500
CTPark Bucharest West	Bucharest-Ilfov	LPP	Retail & Consumer Goods	Pre-lease / expansion	60,000
P3 Bucharest A1	Bucharest-Ilfov	Interbrands Orbico	Retail & Consumer Goods	Renewal	33,000

## Key economic indicators



Source: Oxford Economics, National Institute of Statistics  
\*monthly

## Stock and vacancy in the region



\*Data as of Q4 2025, except for Croatia, where data is as of Q3 2025

## Prime rents and yields

Country	Prime rent sqm/month	Prime yield
CZ	€7.25	5.00%
SK	€7.10	6.25%
HU	€5.50	6.80%
RO	€4.75	8.00%
SRB	€5.00	8.00%
HR	€6.75	7.75%
PL	€5.50	6.25%
DE	€10.70	4.50%

## Contact us

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