



INDUSTRIAL & LOGISTICS MARKET

ROMANIA 2026

INDUSTRIAL & LOGISTICS OVERVIEW

Romania's economy faced significant headwinds in early 2026, including a 0.3% GDP decline, 10.1% inflation, a 6% retail contraction in Q2, along with prolonged political uncertainty. Despite these pressures, the industrial & logistics sector remained resilient as developers added more than 553,000 sq. m of new space during the 2025 – H1 2026 period, raising the total national stock to 8.14 million sq. m. Greater Bucharest absorbed approximately 357,000 sq. m of these deliveries, pushing its regional stock to 4.0 million sq. m, while active pipeline development stands at 532,200 sq. m nationwide and 450,900 sq. m in the capital city.

Occupier activity remained strong, with cumulative gross take-up reaching almost 1.85 million sq. m (1.35 million sq. m in Bucharest) in the same period. A slight increase in overall supply adjusted vacancy rates to 6.7% nationwide and 6.3% in the Bucharest market.

Prime headline rents increased slightly to EUR 4.80/sq. m/month in Bucharest, while regional hubs stayed broadly stable between EUR 4.50 - 4.65/sq. m/month, as construction and financing cost pressures, together with limited availability of modern space in established markets, continue to support gradual rental growth.

The following pages set Romania's performance within the wider European and CEE context, before detailing the industrial & logistics market across Bucharest and the main regional cities – Timisoara, Cluj-Napoca, Brasov, Ploiesti, Pitesti, Sibiu and other markets.

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SUMMARY

- Romania's industrial & logistics stock reached 8.14 million sq. m (~4.0 million in Bucharest) at end of H1 2026, after 553,200 sq. m of new deliveries over the 2025 – H1 2026 period.
- Gross take-up totaled almost 1.85 million sq. m in the same 18 months, of which 569,100 sq. m in H1 2026 alone (an 11% increase year-on-year), with net take-up holding a 58% share.
- The pipeline remains robust, with 532,200 sq. m under construction, keeping the supply consistent until the end of 2027.
- Vacancy climbed over the 18 months to 6.7% nationally and 6.3% in the capital city, as speculative completions ran ahead of absorption.
- Prime headline rent rose to EUR 4.80/sq. m/month in Bucharest, while regional hubs held steady within a EUR 4.50 – 4.65 range.
- Macro conditions remain challenging (with a -0.3% GDP contraction and a 10.1% inflation in Q2 2026), yet occupier demand proved resilient, with a broader rebound expected in the second part of the year.

Total Stock



8,139,800 SQ. M

New Supply 2025 – H1 2026



553,200 SQ. M

Gross Take-up 2025 – H1 2026



1,847,200 SQ. M

Under Construction Pipeline



532,200 SQ. M

Prime Rent



4.80 EUR/SQ. M

Vacancy Rate

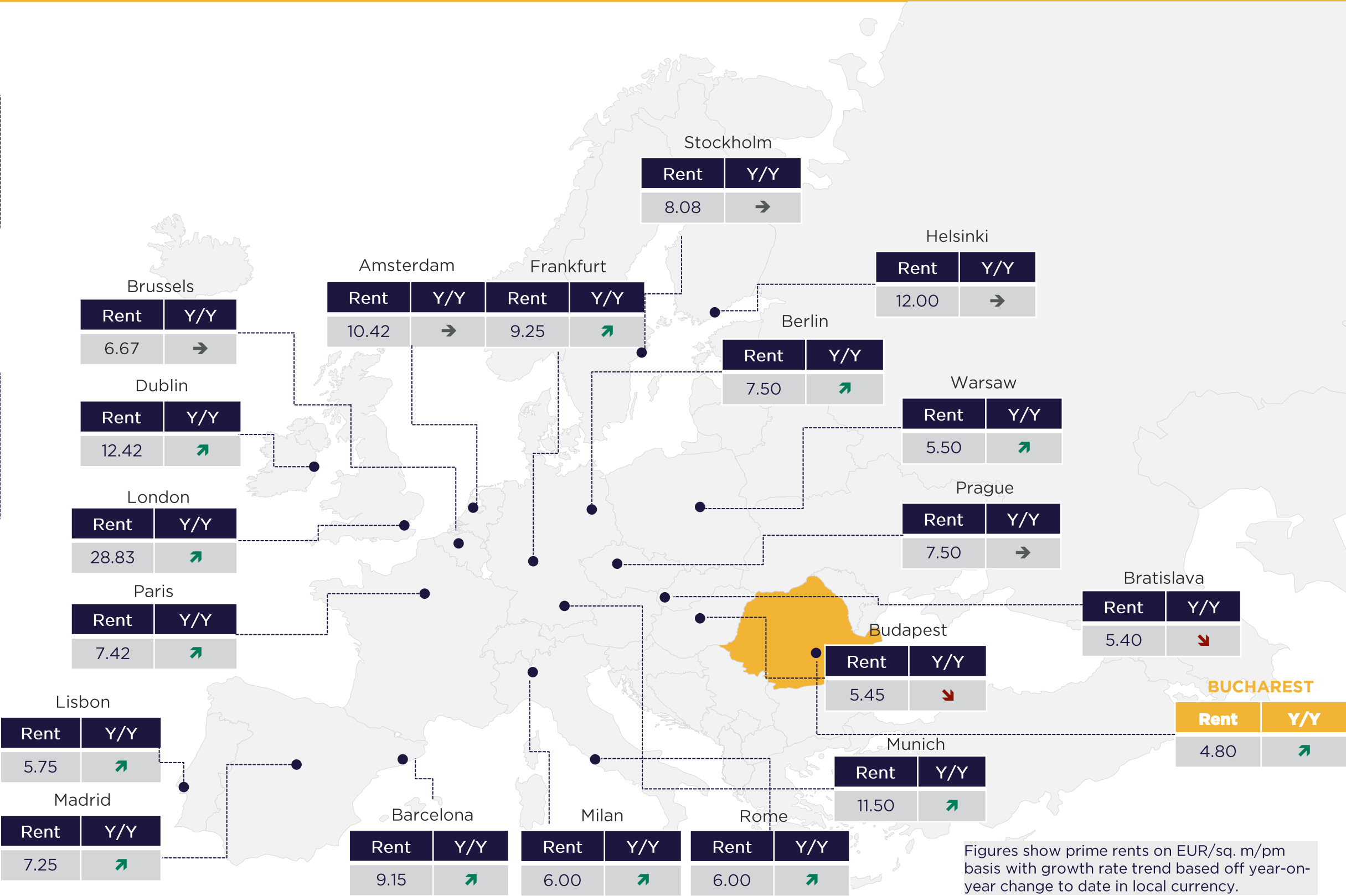


6.7%

EUROPEAN INDUSTRIAL & LOGISTICS MARKET OVERVIEW

Europe	
Q/Q	Y/Y
0.6%	2.4%

Romania	
Q/Q	Y/Y
1.1%	2.1%



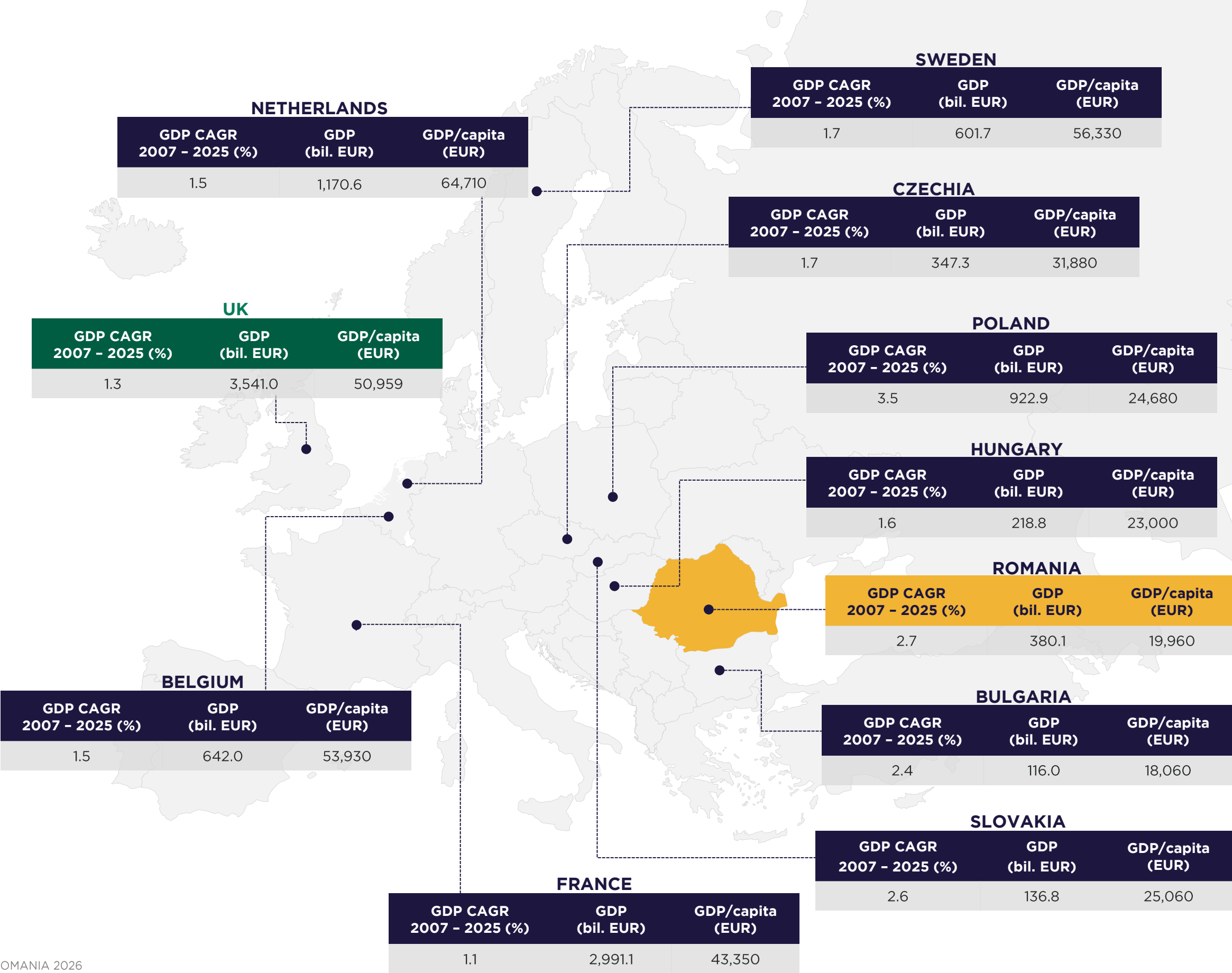
Source: Cushman & Wakefield

EUROPEAN INDUSTRIAL & LOGISTICS MARKET OVERVIEW

European Union		
GDP CAGR 2007 - 2025 (%)	GDP (bil. EUR)	GDP/capita (EUR)
1.2	18,796	41,570

INDUSTRIAL & LOGISTICS DATA		
COUNTRY	STOCK (SQ. M)	UC PIPELINE (SQ. M)
UK	146,140,900	N/A
France	59,106,600	2,584,200
Poland	38,006,400	1,303,700
Netherlands	30,635,000	N/A
Belgium	29,018,000	104,800
Sweden	17,067,500	687,500
Czechia	13,733,800	1,152,300
Romania	8,139,800	532,200
Hungary	6,510,200	499,800
Slovakia	4,890,500	265,800
Bulgaria	2,404,400*	242,000*

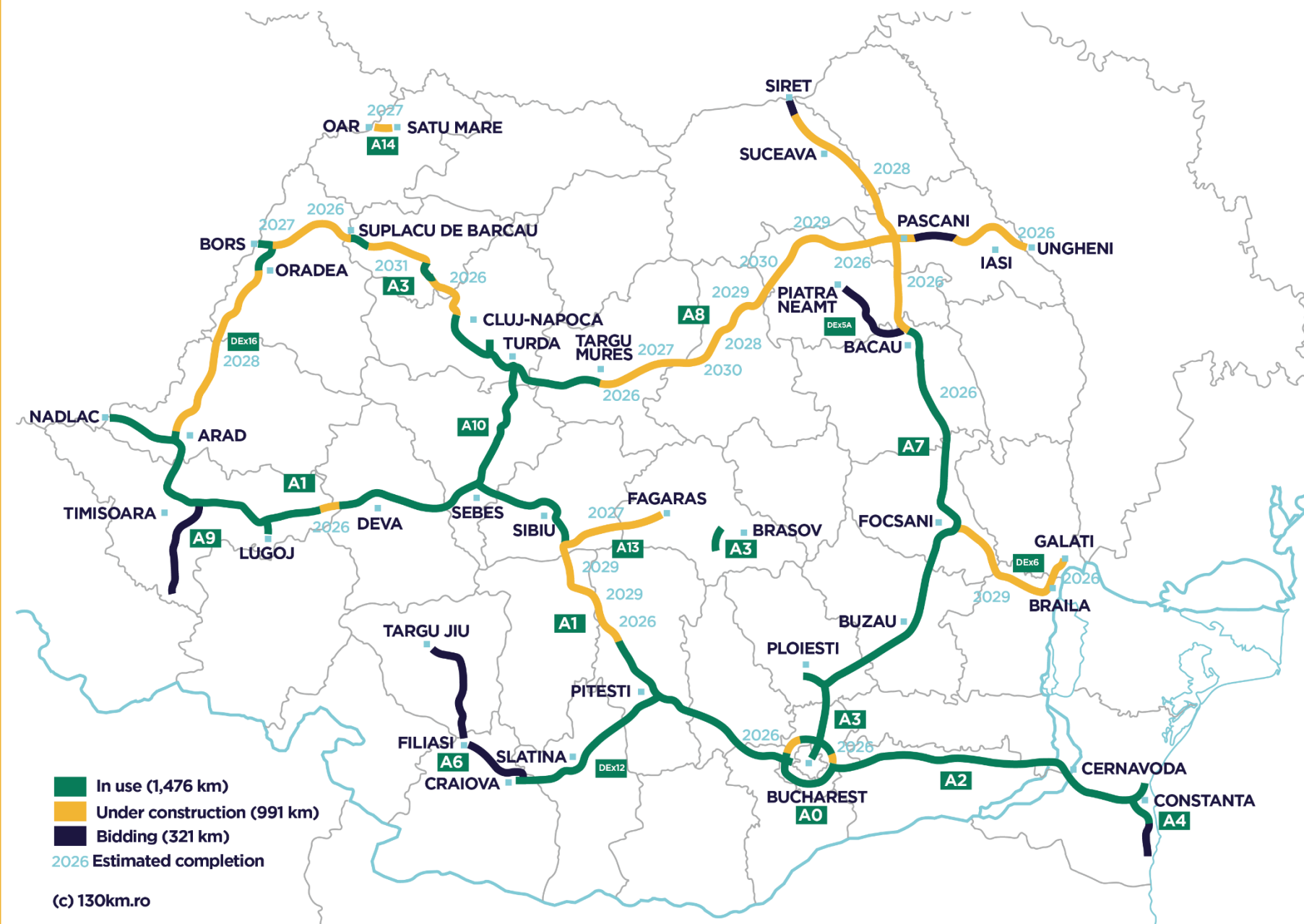
*Sofia only
Sources: Eurostat (2025 data), Cushman & Wakefield



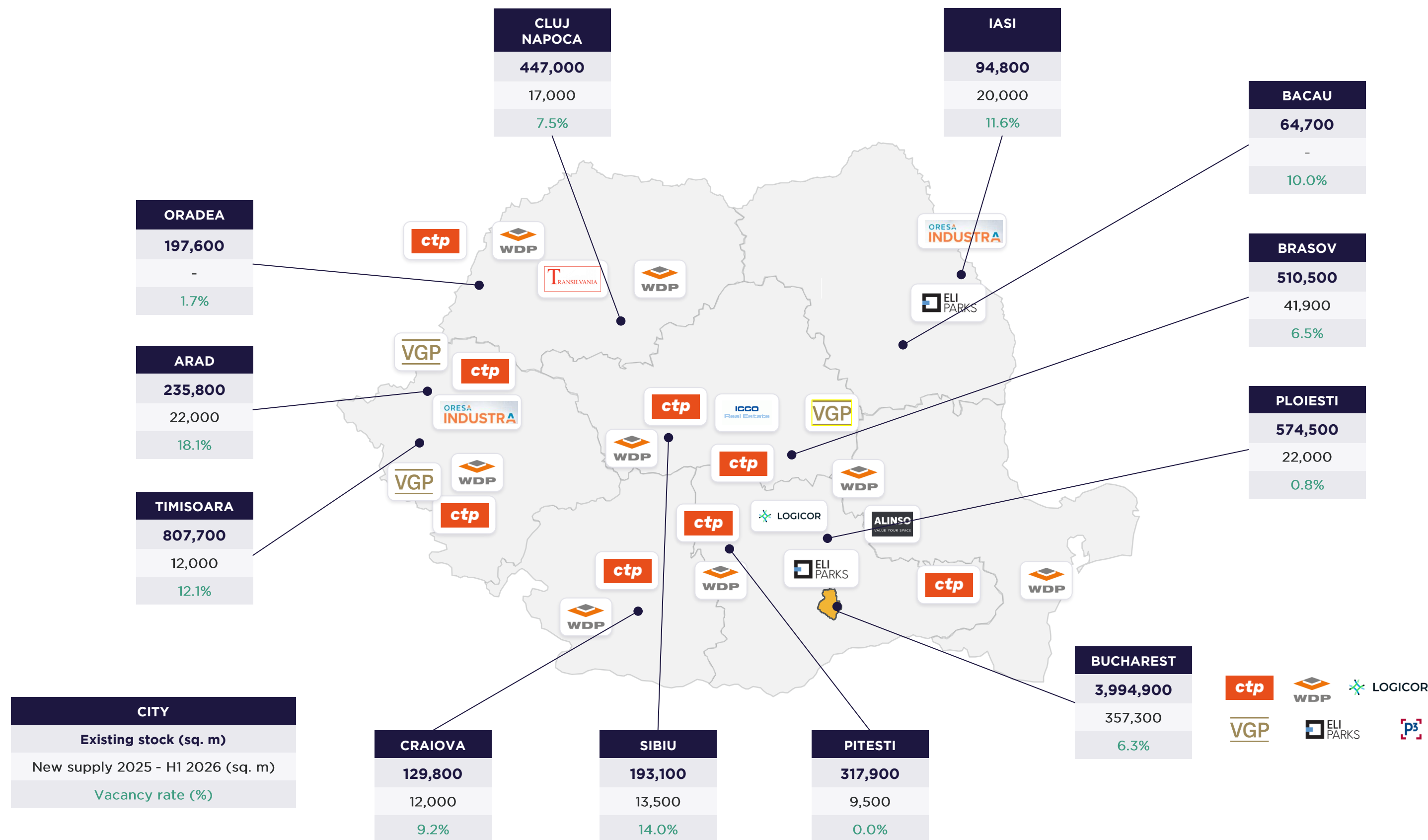
ROMANIA INDUSTRIAL & LOGISTICS MARKET OVERVIEW

- **LOCATION:** CEE Region
- **AREA:** 238,397 sq. km
- **POPULATION (2026):** 19,041,300 inhabitants
- **UNEMPLOYMENT RATE (2026 F):** 3.5%
- **NET MONTHLY INCOME (2026 F):** EUR 1,075
- **GDP/ CAPITA (2026 F):** EUR 20,900
- **ANNUAL INFLATION RATE (2026 F):** 7.9%
- **EXPORTS (2026 F):** EUR 99.3 billion
- **FDI STOCK (2025):** EUR 134.8 billion
- **LABOUR FORCE (2026 F):** 5.44 million

Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



ROMANIA INDUSTRIAL & LOGISTICS MARKET OVERVIEW



Source: Cushman & Wakefield Echinox Research

ROMANIA INDUSTRIAL & LOGISTICS MARKET OVERVIEW

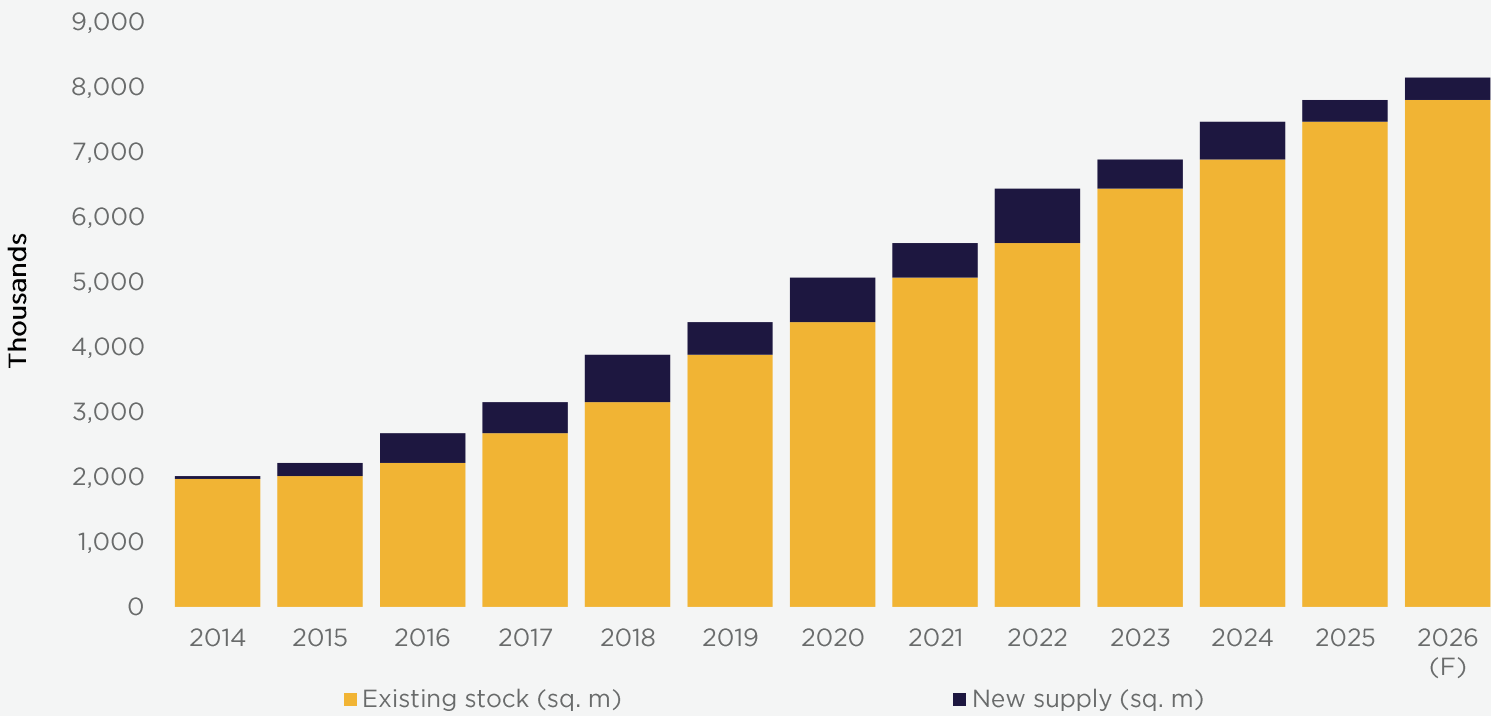
ROMANIA MARKETS

CITY	POPULATION	NEW SUPPLY 2025 – H1 2026 (SQ. M)	STOCK H1 2026 (SQ. M)	UC PIPELINE (SQ. M)
BUCHAREST	1,716,983	357,300	3,994,900	450,900
TIMISOARA	250,849	12,000	807,700	-
PLOIESTI	180,539	22,000	574,500	-
BRASOV	237,589	41,900	510,500	-
CLUJ - NAPOCA	286,598	17,000	447,000	11,000
PITESTI	141,275	9,500	317,900	-
ARAD	145,078	22,000	235,800	-
ORADEA	183,105	-	197,600	-
SIBIU	134,308	13,500	193,100	15,000
CRAIOVA	234,140	12,000	129,800	-
IASI	271,692	20,000	94,800	40,000
BACAU	136,102	-	64,700	-

MAJOR PLAYERS

DEVELOPER	COUNTRY OF ORIGIN	PORTFOLIO (SQ. M)
CTP	Netherlands	3,335,000
WDP	Belgium	2,006,000
VGP	Belgium	571,000
P3	Singapore	380,000
Logicor	China	325,000
ALINSO	Belgium	275,000

Fig. 1 Stock evolution (sq. m)



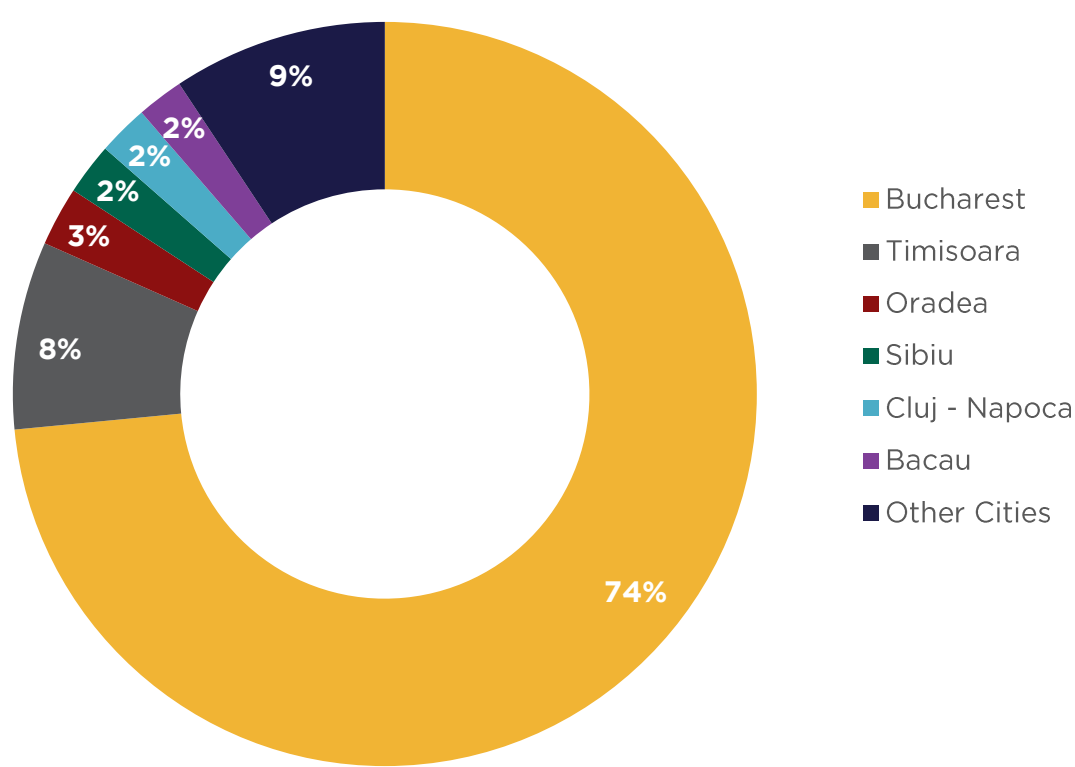
Source: Cushman & Wakefield Echinox Research

ROMANIA INDUSTRIAL & LOGISTICS MARKET OVERVIEW

MAJOR DEALS 2025 - H1 2026

PROPERTY	CITY	TENANT	SIZE (SQ. M)	TYPE
P3 Bucharest	Bucharest	Carrefour	84,500	Renewal
CTPark Bucharest West	Bucharest	Maersk - IB Cargo	76,000	Renewal
CTPark Bucharest West	Bucharest	LPP	60,000	New lease
WDP Park Stefanesti	Bucharest	Action	54,000	Pre - lease
CTPark Bucharest West	Bucharest	Leroy Merlin	48,000	Pre - lease

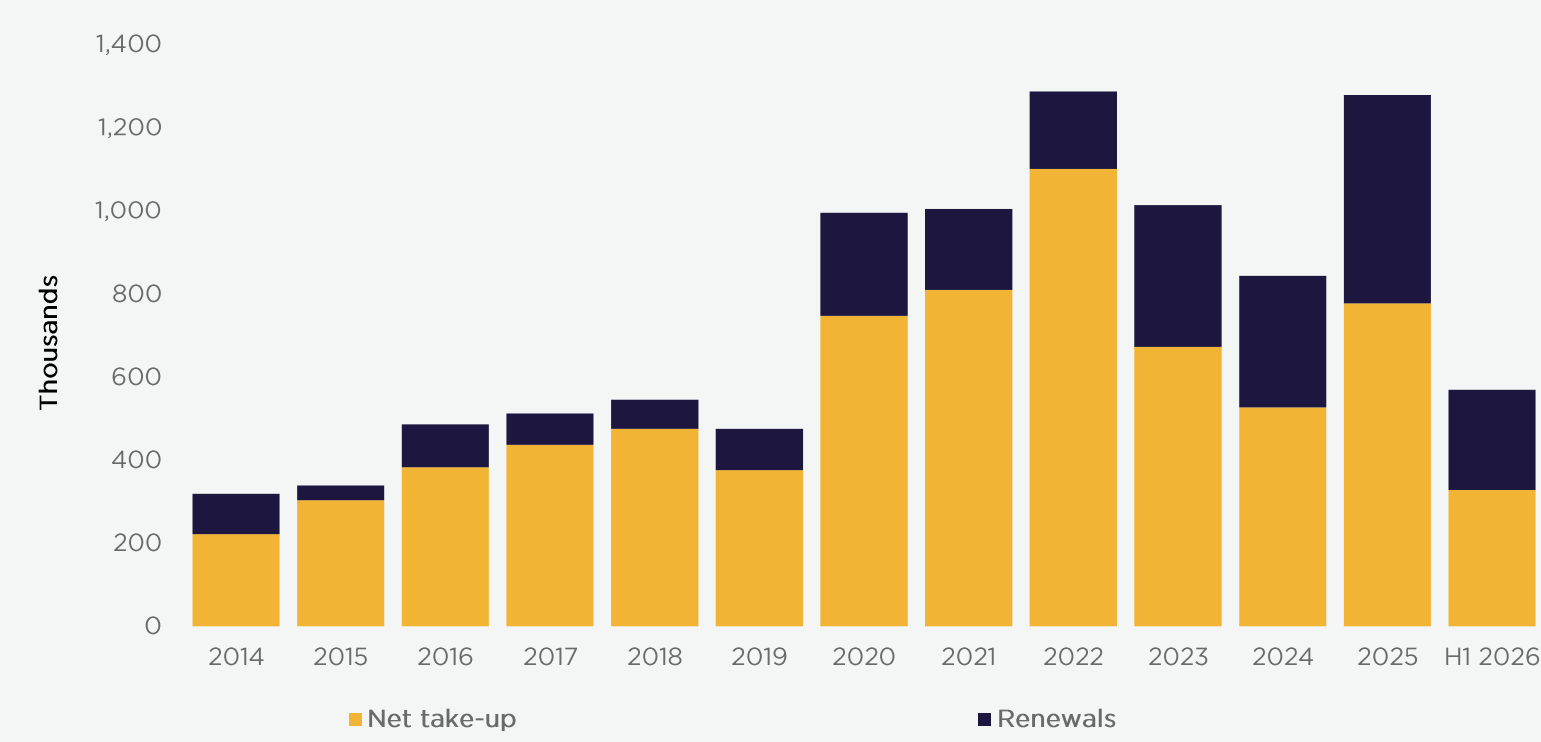
TAKE-UP 2025 - H1 2026



MAJOR INDUSTRIAL & LOGISTICS OWNERS + NEW ENTRIES



Fig. 1 Take-up evolution (sq. m)



BUCHAREST

Total Stock

3,994,900 sq.m

New Supply 2025 – H1 2026

357,300 sq. m

Gross Take-up 2025 – H1 2026

1,352,500 sq. m

Under Construction Pipeline

450,900 sq. m

Prime Rent

4.80 EUR/sq. m/month

Vacancy Rate

6.3%

MACROECONOMIC & DEMOGRAPHIC METRO

Total Population (2026)	City: 1,716,983 Metro: 2,259,669
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Labour Force (2026)	1,241,600
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Unemployed Population (2026)	7,200
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Unemployment Rate (2026F)	0.5%
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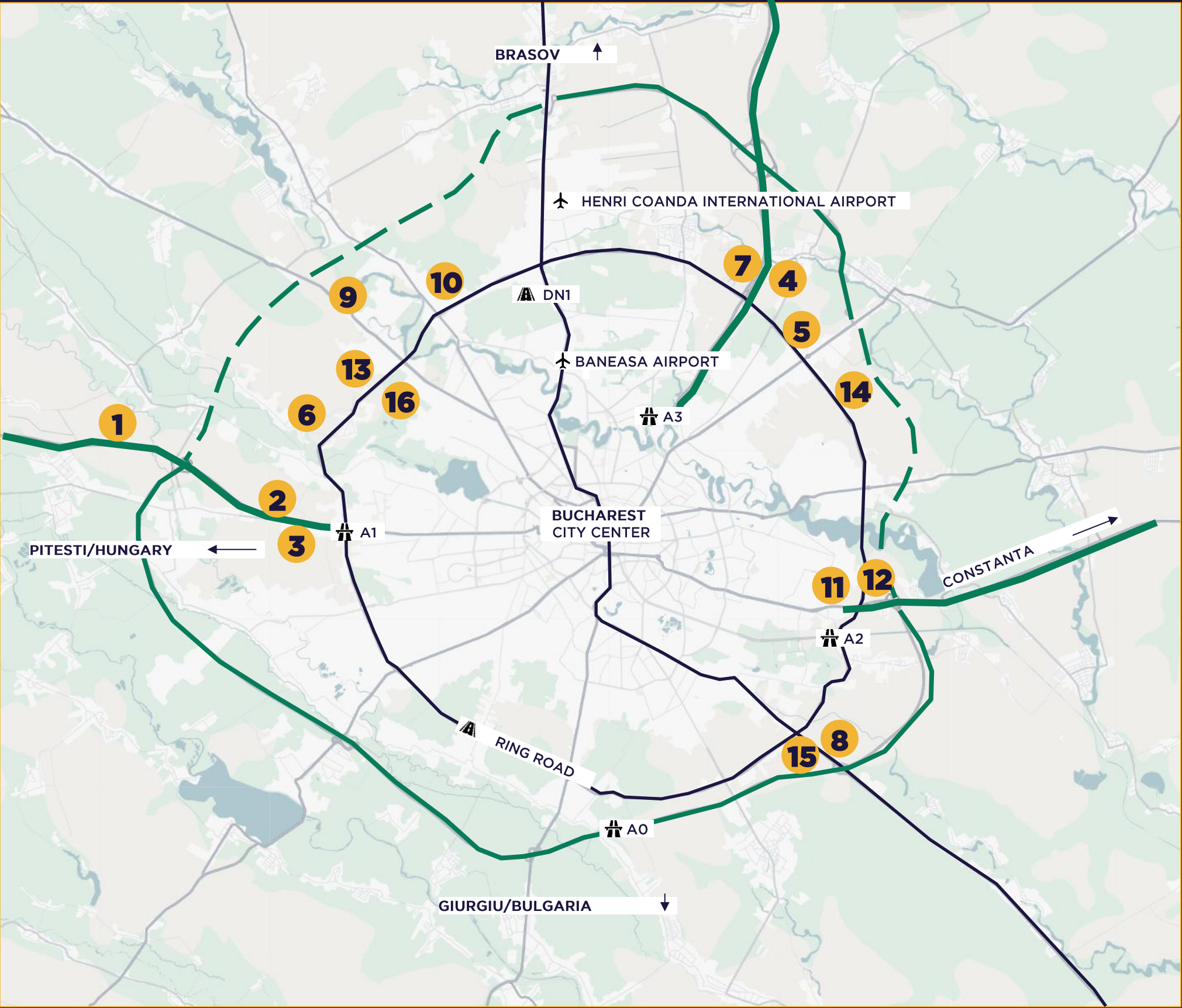
Average Net Monthly Income (EUR)	1,408
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GDP 2026F (bn. EUR)	114.9
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GDP/ CAPITA 2026F (EUR)	49,398
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FDI Stock 2025 (bn. EUR)	79.1
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

1 CTPARK BUCHAREST WEST

2 CTPARK BUCHAREST

3 P3 BUCHAREST

4 WDP PARK STEFANESTI

5 CTPARK BUCHAREST NORTH

6 WDP PARK DRAGOMIRESTI

7 VGP BUCHAREST NORTH

8 CTPARK BUCHAREST SOUTH

9 ELI PARK

10 LOGICOR MOGOSOAIA

11 LOGICOR PALLADY

12 VGP BUCHAREST EAST

13 CTPARK BUCHAREST CHITILA

14 LOGICOR PANTELIMON

15 LION'S HEAD INDUSTRIAL UC

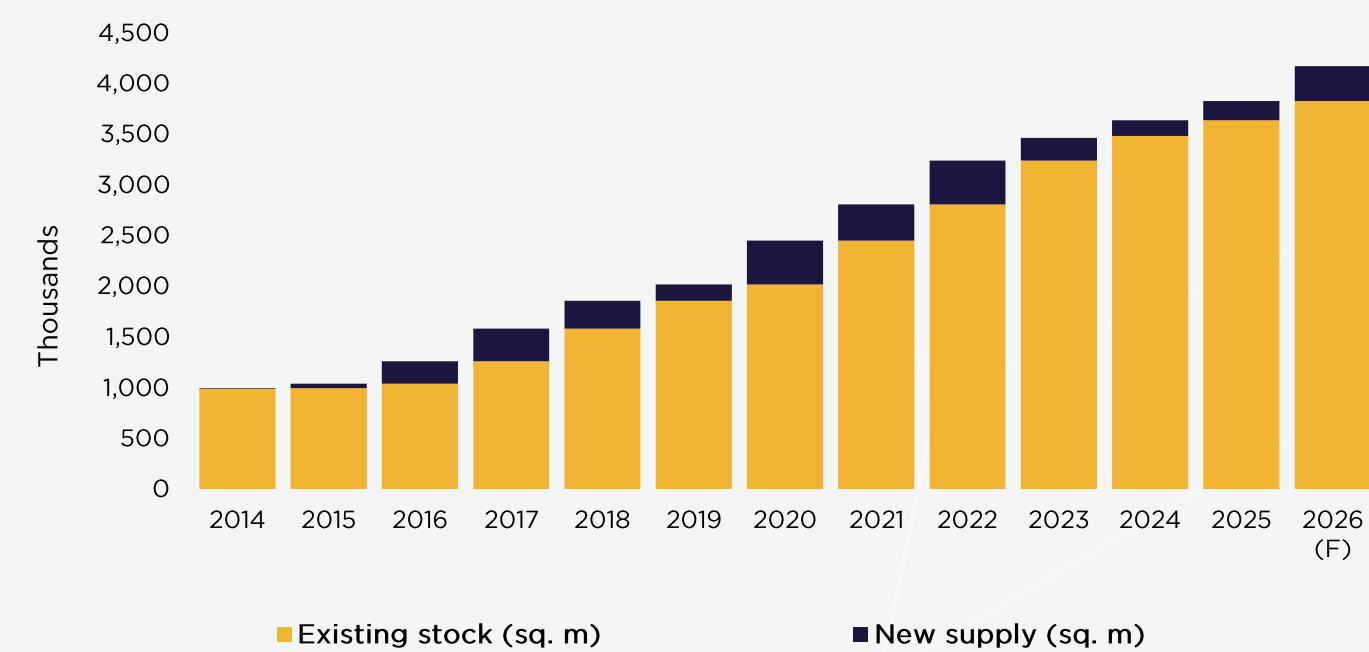
16 MLP BUCHAREST

BUCHAREST

MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
CTP	2,071,000
WDP	534,000
P3	380,000
Logicor	252,000
VGP	147,000

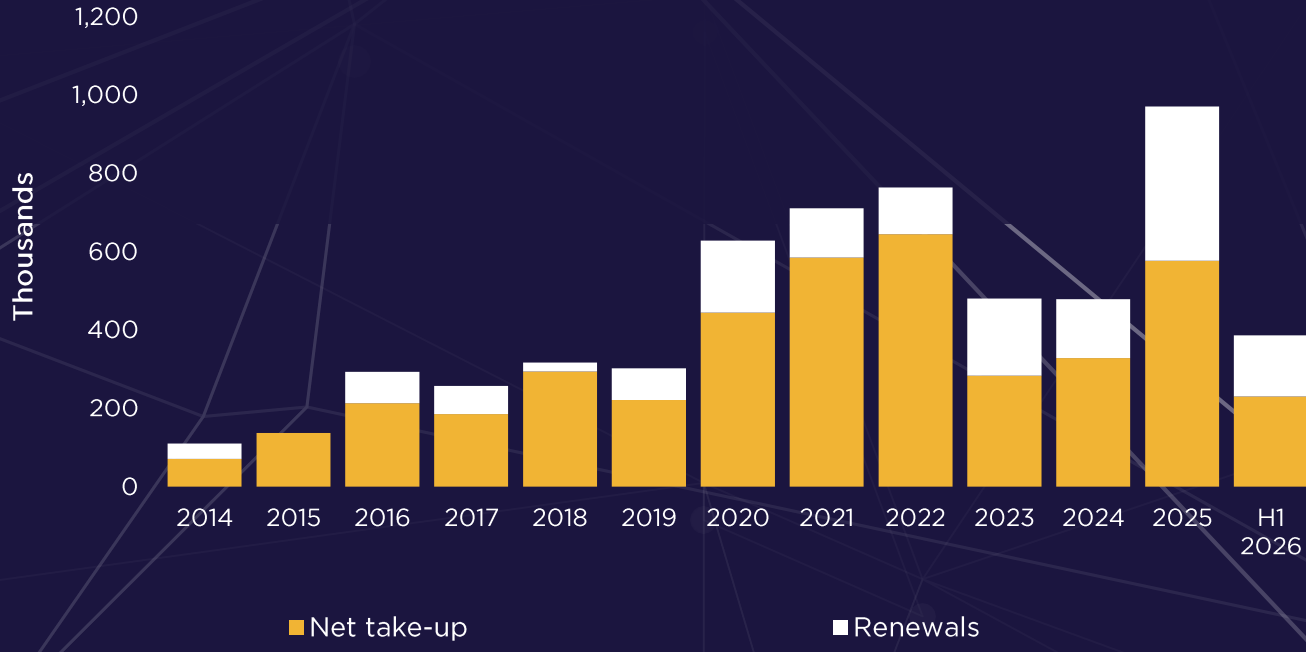
STOCK EVOLUTION (SQ. M)



MAJOR DEALS 2025 - H1 2026

TENANT	GLA (SQ. M)	PROJECT	TYPE
Carrefour	84,500	P3 Bucharest	Renewal
Maersk - IB Cargo	76,000	CTPark Bucharest West	Renewal
LPP	60,000	CTPark Bucharest West	New lease
Action	54,000	WDP Park Stefanesti	Pre - lease
Leroy Merlin	48,000	CTPark Bucharest West	Pre - lease

TAKE-UP EVOLUTION (SQ. M)



TIMISOARA

Total Stock

807,700 SQ. M

New Supply 2025 – H1 2026

12,000 SQ. M

Gross Take-up 2025 – H1 2026

150,800 SQ. M

Under Construction Pipeline

–

Prime Rent

4.65 EUR/SQ. M/month

Vacancy Rate

12.1%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026) City: 250,849
County: 650,533

Labour Force (2026) 254,700

Unemployed Population (2026) 3,500

Unemployment Rate (2026F) 1.1%

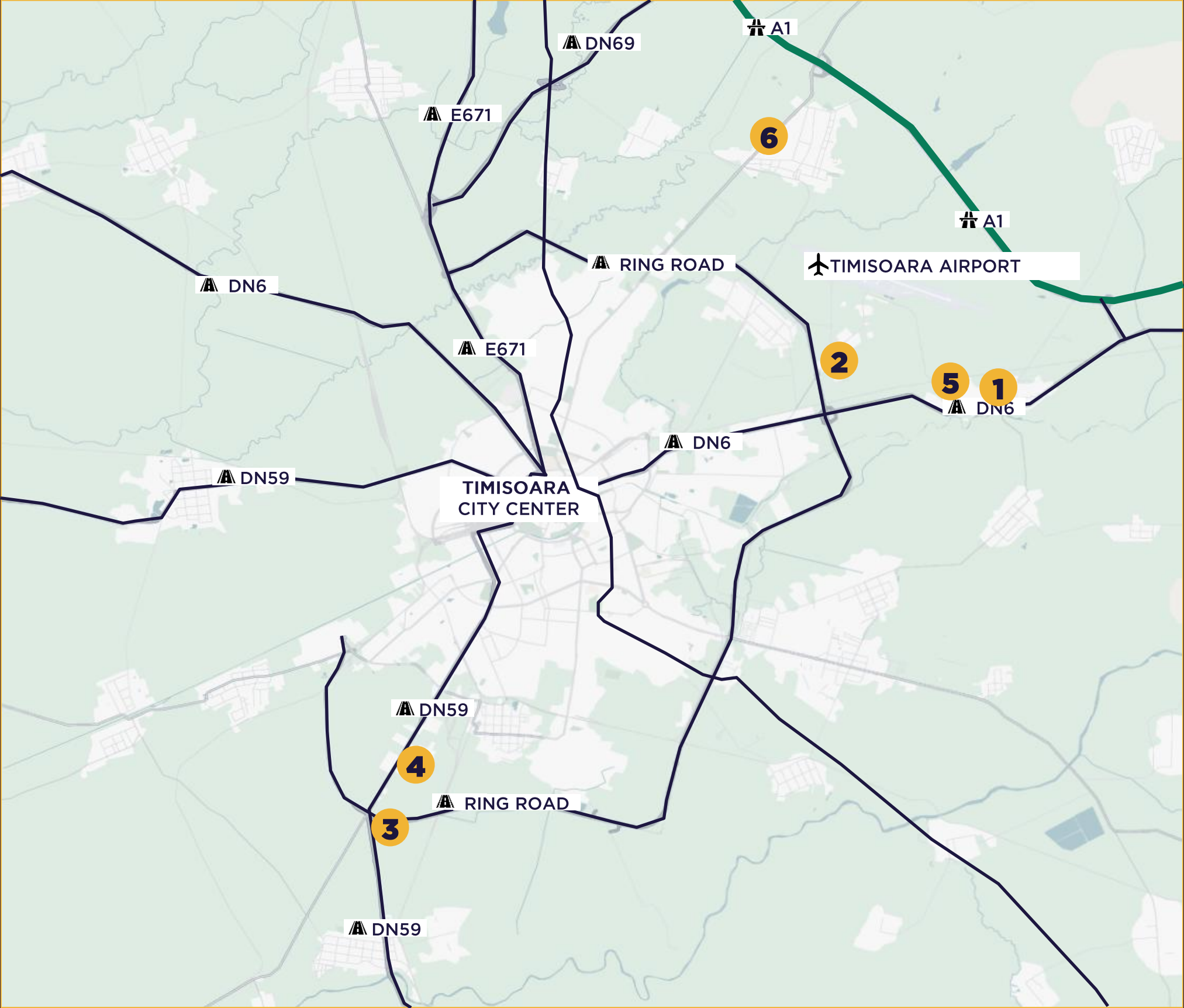
Average Net Monthly Income (EUR) 1,194

GDP 2026F (bn. EUR) 17.24

GDP/ CAPITA 2026F (EUR) 25,646

FDI Stock 2025 (bn. EUR) 6.0

Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

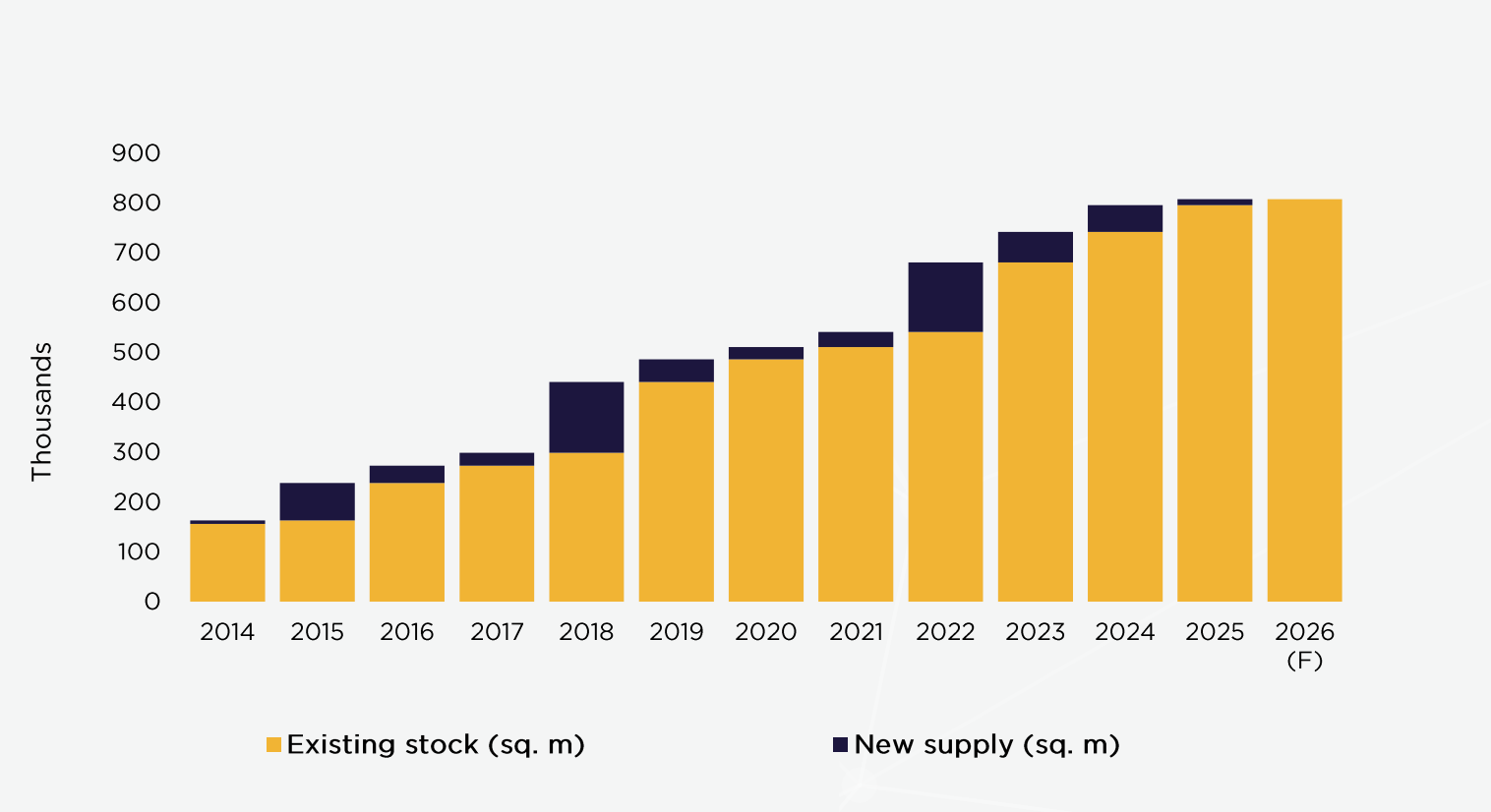
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|---|--------------------|---|------------------------|
| 1 | CTPARK TIMISOARA | 4 | CTPARK TIMISOARA SOUTH |
| 2 | VGP PARK TIMISOARA | 5 | LOGICOR TIMISOARA |
| 3 | WDP PARK TIMISOARA | 6 | CTPARK TIMISOARA NORTH |

TIMISOARA

MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
CTP	363,000
VGP	173,000
WDP	170,000

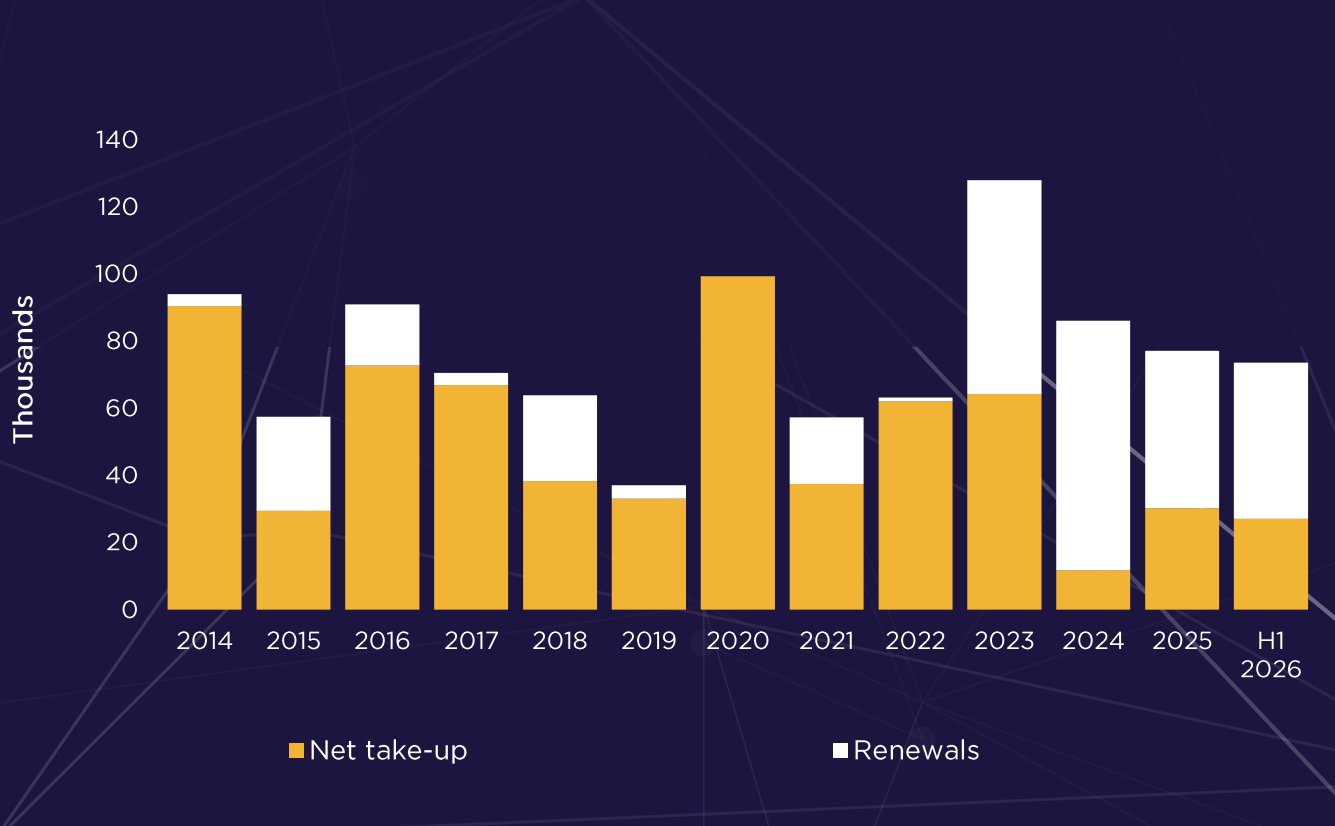
STOCK EVOLUTION (SQ. M)



MAJOR DEALS 2025 – H1 2026

TENANT	GLA (SQ. M)	PROJECT	TYPE
Valeo	41,500	CTPark Timisoara North	Renewal
RPW Logistics	21,500	VGP Park Timisoara	Renewal
Kyocera	16,000	CTPark Timisoara North	Renewal
Lift Banat	6,000	VGP Park Timisoara	New lease

TAKE-UP EVOLUTION (SQ. M)



PLOIESTI

Total Stock

574,500 SQ. M

New Supply 2025 – H1 2026

22,000 SQ. M

Gross Take-up 2025 – H1 2026

30,400 SQ. M

Under Construction Pipeline

–

Prime Rent

4.65 EUR/SQ. M/month

Vacancy Rate

0.8%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026)	City: 180,539 County: 695,117
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Labour Force (2026)	181,800
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Unemployed Population (2026)	6,000
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Unemployment Rate (2026F)	2.4%
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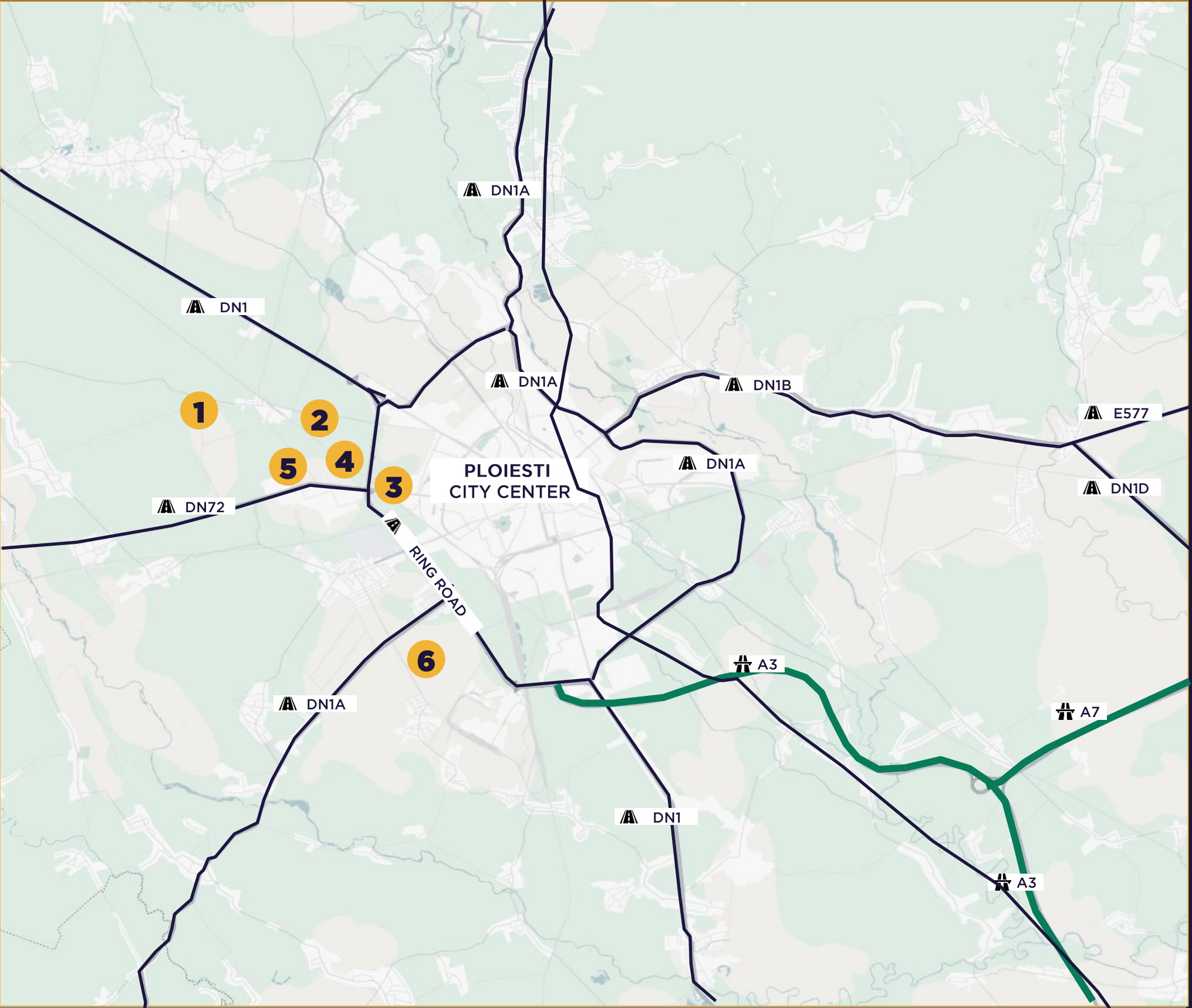
Average Net Monthly Income (EUR)	1,023
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GDP 2026F (bn. EUR)	12.34
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GDP/ CAPITA 2026F (EUR)	18,132
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FDI Stock 2025 (bn. EUR)	2.9
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

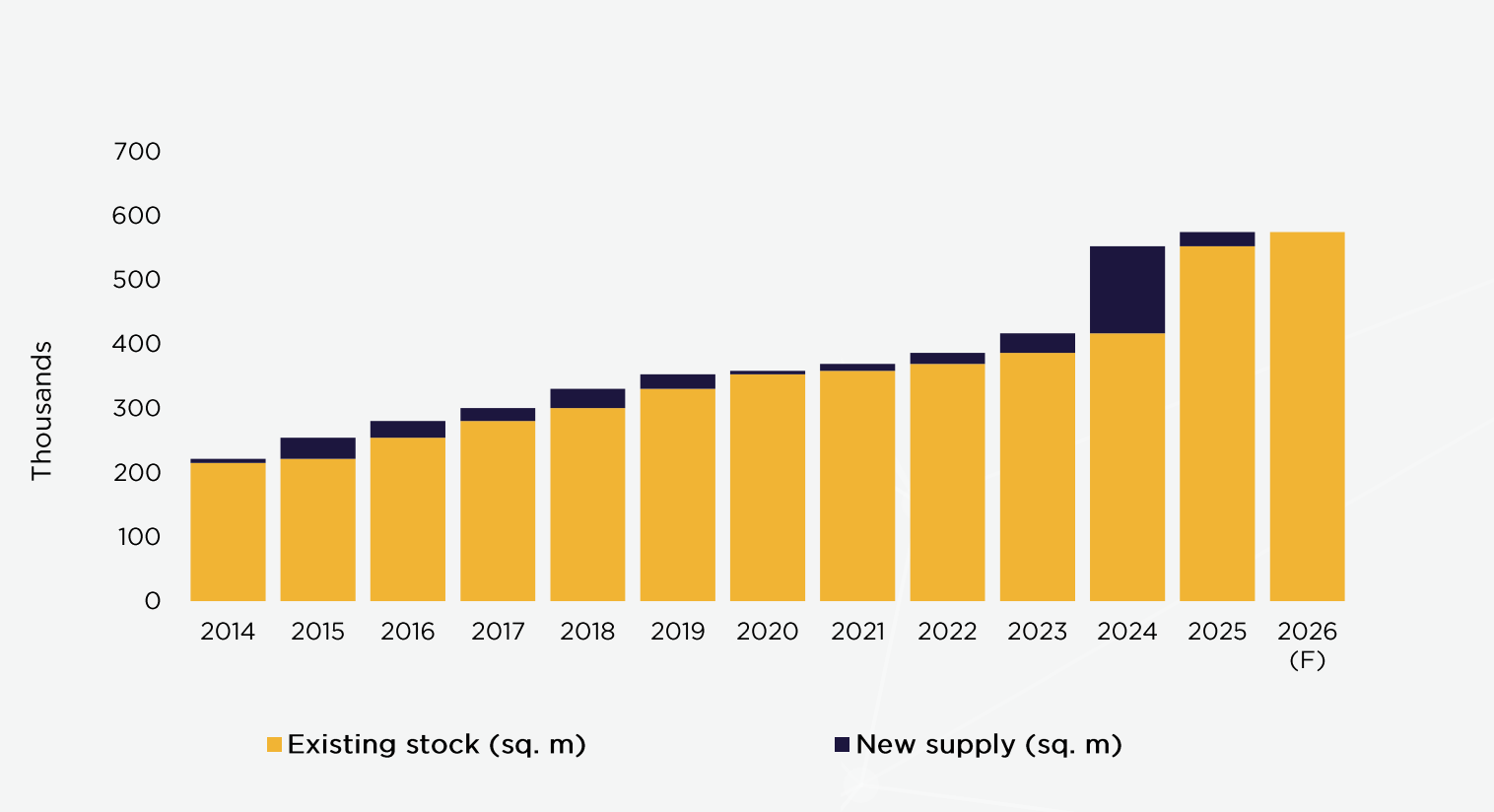
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|---|--------------------|---|-------------------|
| 1 | PLOIESTI WEST PARK | 4 | ELI PARK PLOIESTI |
| 2 | WDP PARK PLOIESTI | 5 | LOGICOR PLOIESTI |
| 3 | CTPARK PLOIESTI | 6 | WDP PARK BRAZI |

PLOIESTI

MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
Alinso	250,000
WDP	115,000
CTP	86,000

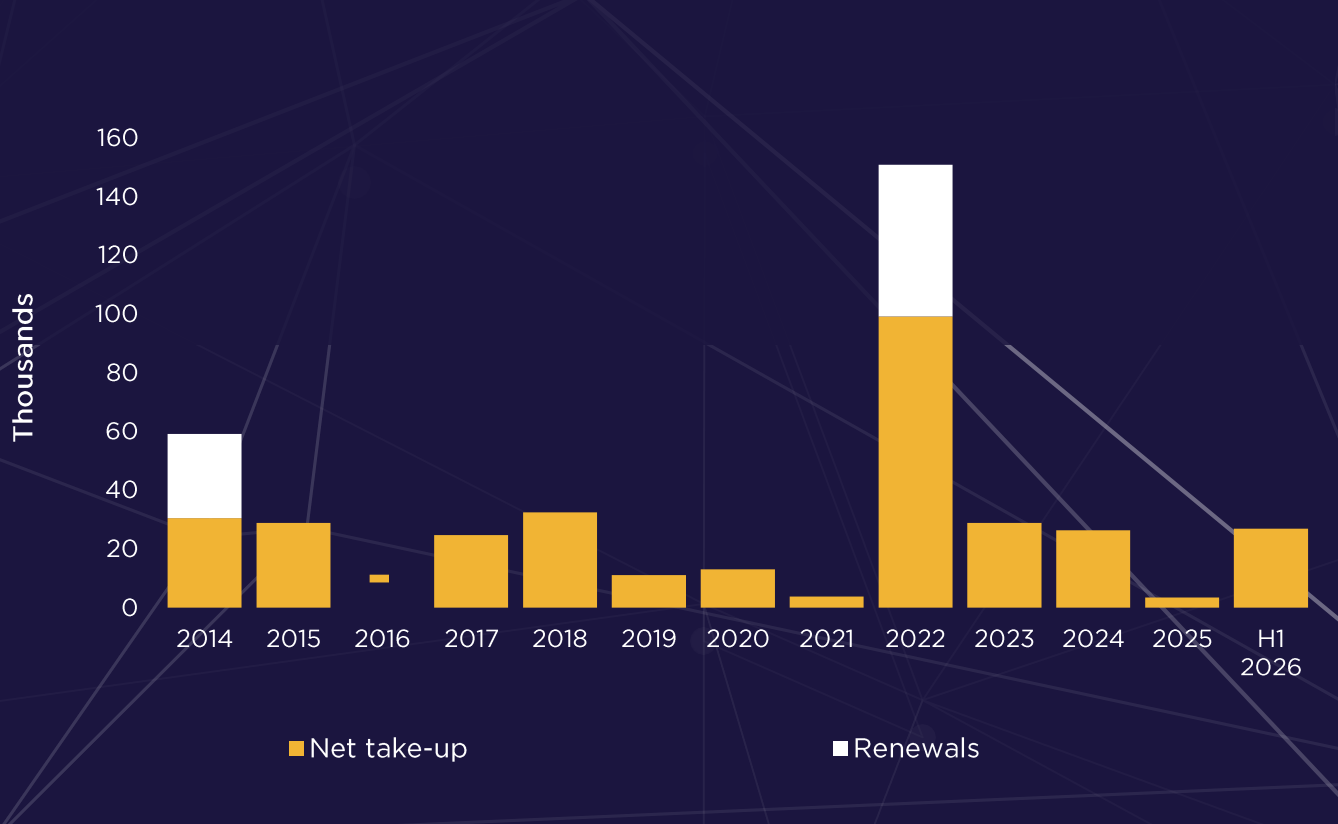
STOCK EVOLUTION (SQ. M)



MAJOR DEALS 2025 – H1 2026

TENANT	GLA (SQ. M)	PROJECT	TYPE
Jungheinrich	27,000	WDP Park Ploiesti	New lease
DAAS	3,500	ELI Park Ploiesti	New lease

TAKE-UP EVOLUTION (SQ. M)



BRASOV

Total Stock

510,500 sq. m

New Supply 2025 – H1 2026

41,900 sq. m

Gross Take-up 2025 – H1 2026

31,400 sq. m

Under Construction Pipeline

-

Prime Rent

4.65 EUR/sq. m/month

Vacancy Rate

6.5%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026)	City: 237,589 County: 546,615
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Labour Force (2026)	183,900
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Unemployed Population (2026)	7,400
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Unemployment Rate (2026F)	2.9%
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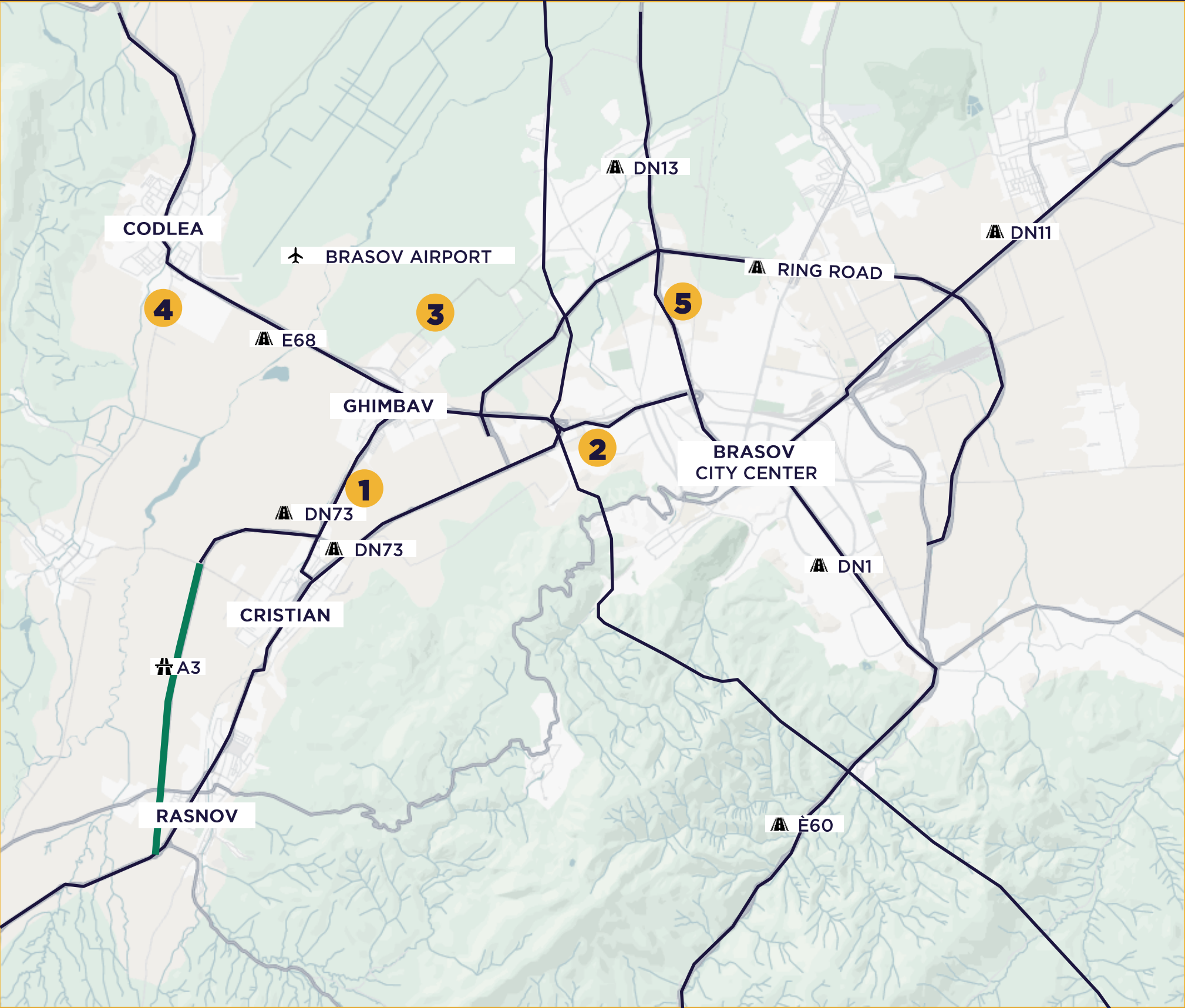
Average Net Monthly Income (EUR)	1,087
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GDP 2026F (bn. EUR)	13.28
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GDP/ CAPITA 2026F (EUR)	23,616
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FDI Stock 2025 (bn. EUR)	3.0
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

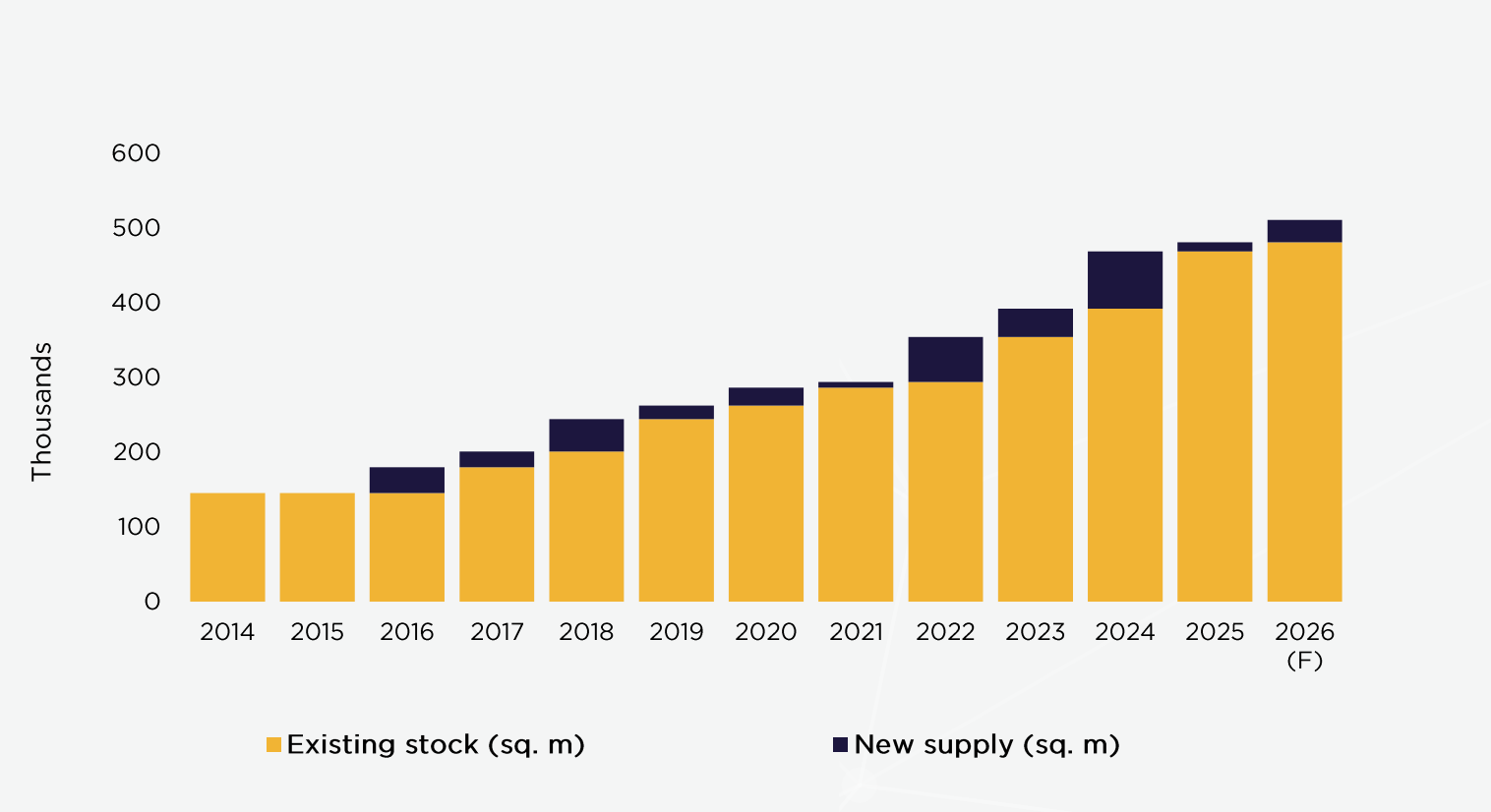
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|---|-------------------------------|---|-----------------|
| 1 | CTPARK BRASOV WEST | 4 | WDP PARK BRASOV |
| 2 | VGP PARK BRASOV | 5 | CTPARK BRASOV |
| 3 | INDUSTRIAL PARK BRASOV (ICCO) | | |

BRASOV

MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
VGP	171,000
ICCO	147,000
CTP	75,000

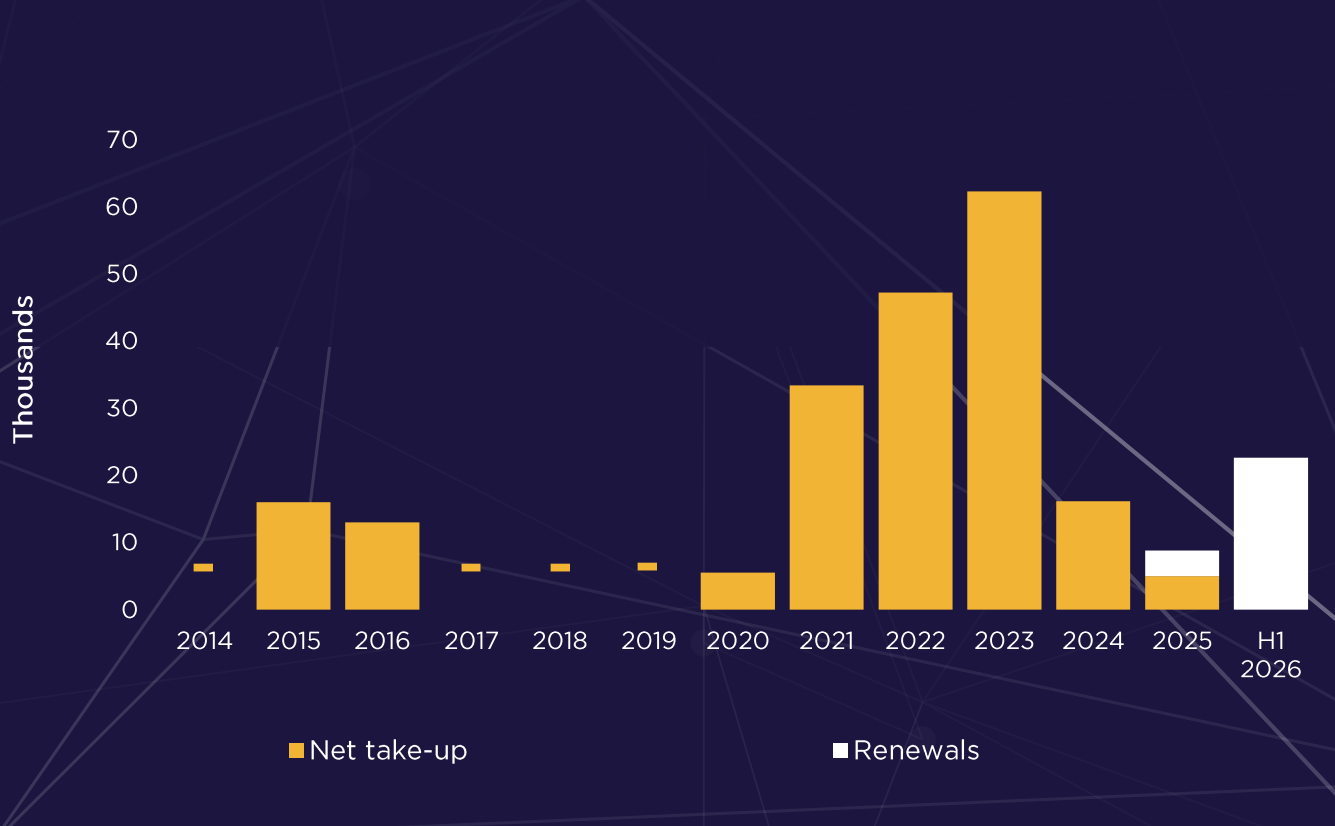
STOCK EVOLUTION (SQ. M)



MAJOR DEALS 2025 – H1 2026

TENANT	GLA (SQ. M)	PROJECT	TYPE
Hendi	5,000	Sofimat Ghimbav	New lease
Joyson Quin	3,800	CTPark Brasov West	Renewal

TAKE-UP EVOLUTION (SQ. M)



CLUJ-NAPOCA

Total Stock

447,000 SQ. M

New Supply 2025 – H1 2026

17,000 SQ. M

Gross Take-up 2025 – H1 2026

40,500 SQ. M

Under Construction Pipeline

11,000 SQ. M

Prime Rent

4.65 EUR/SQ. M/month

Vacancy Rate

7.5%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026)	City: 286,598 County: 679,141
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Labour Force (2026)	261,200
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Unemployed Population (2026)	5,500
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Unemployment Rate (2026F)	1.6%
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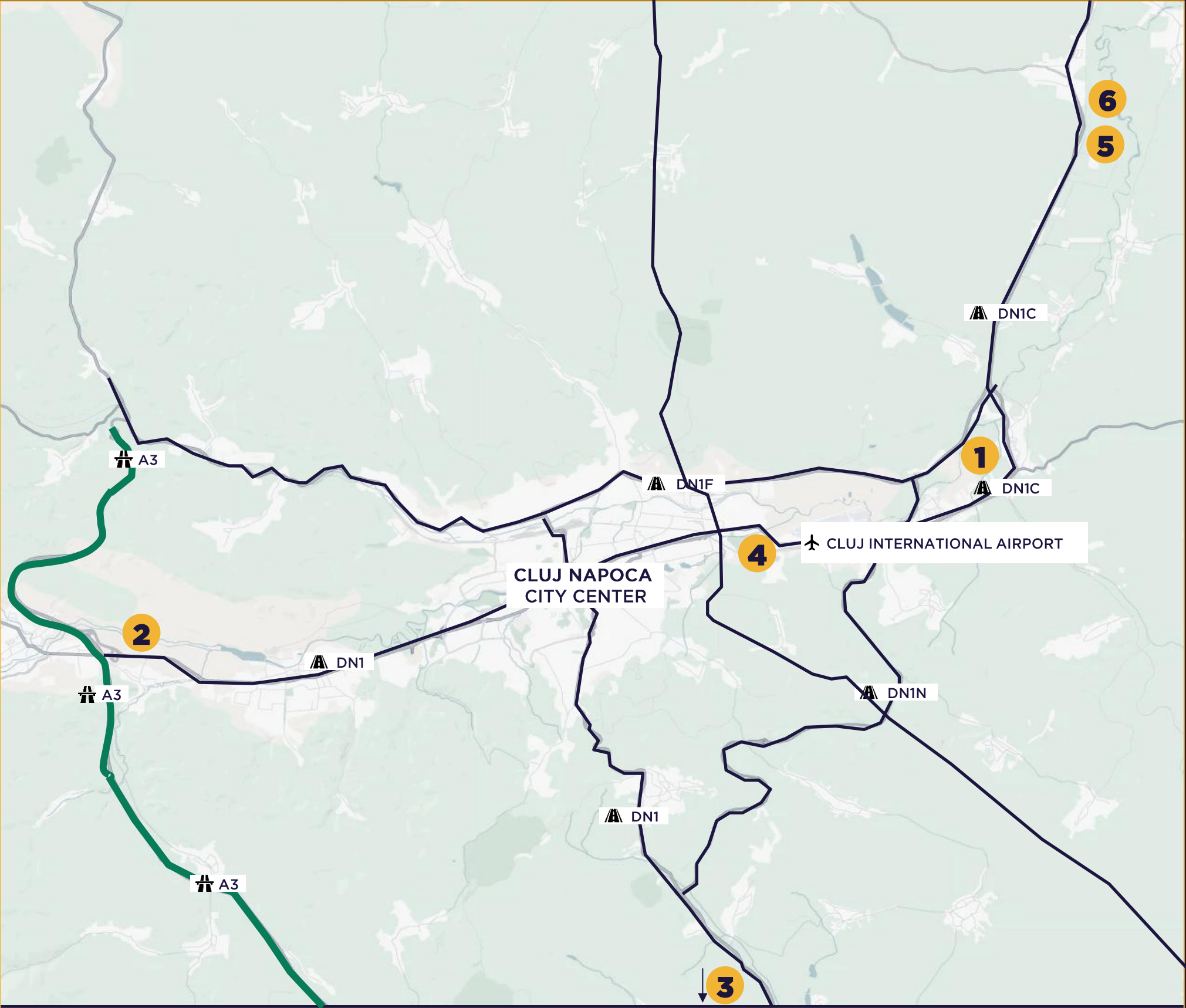
Average Net Monthly Income (EUR)	1,291
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GDP 2026F (bn. EUR)	21.29
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GDP/ CAPITA 2026F (EUR)	30,485
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FDI Stock 2025 (bn. EUR)	3.6
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND - MAJOR PARKS

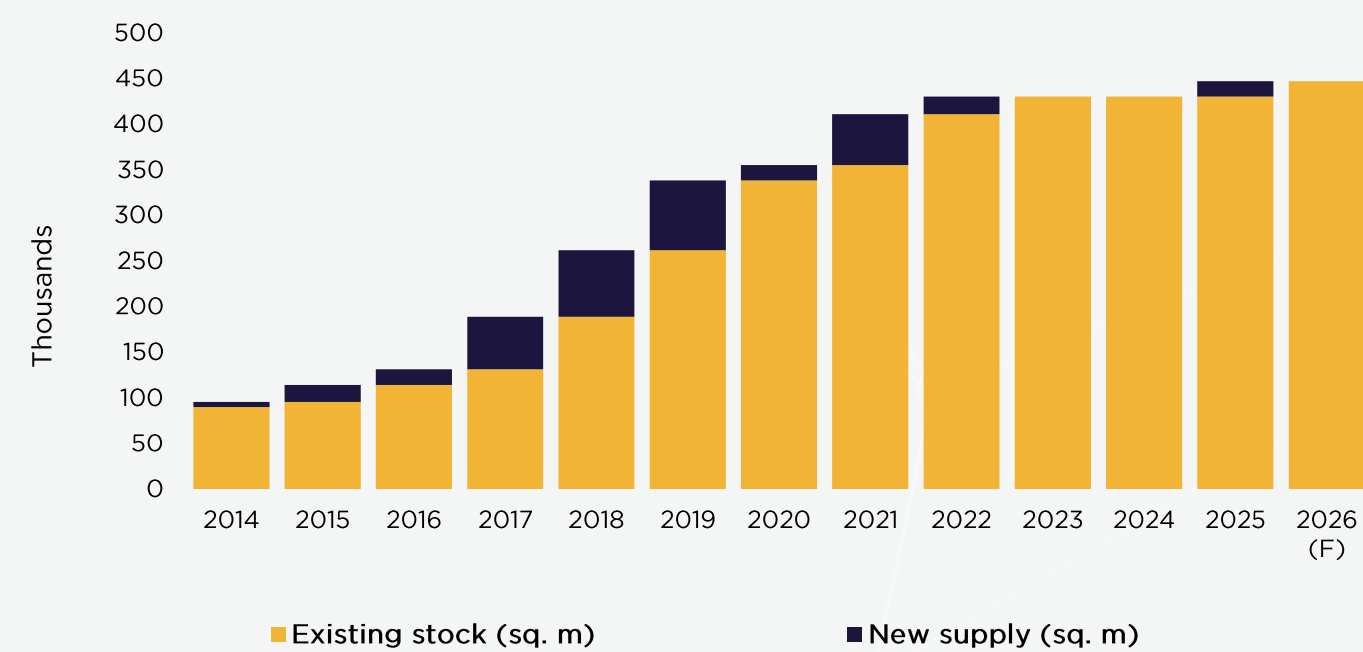
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|---|---------------|---|-----------------------|
| 1 | WDP PARK CLUJ | 4 | TRC PARK TRANSILVANIA |
| 2 | CTPARK CLUJ | 5 | TRC PARK CLUJ |
| 3 | CTPARK TURDA | 6 | OLYMPIAN PARK CLUJ |

CLUJ-NAPOCA

MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
Transilvania Constructii	141,000
WDP	124,000
CTP	52,000

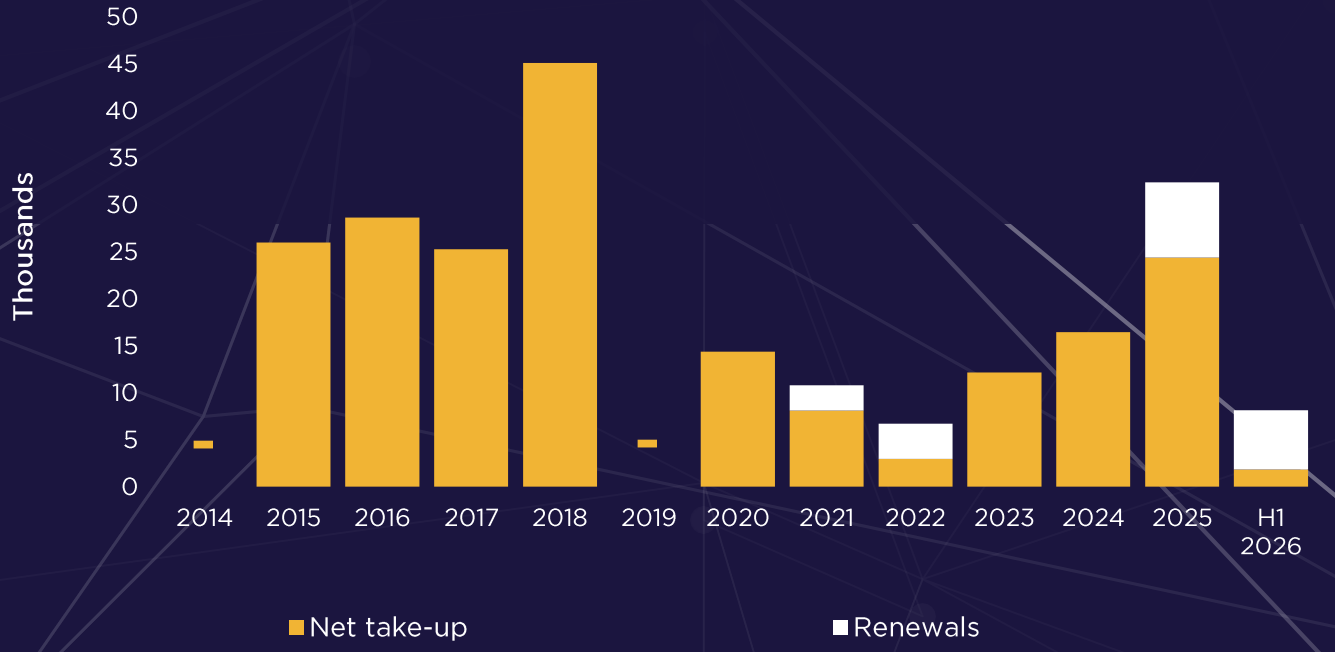
STOCK EVOLUTION (SQ. M)



MAJOR DEALS 2025 – H1 2026

TENANT	GLA (SQ. M)	PROJECT	TYPE
Dr. Max	11,200	WDP Park Cluj	Pre-lease
DB Schenker	5,500	Olympian Parks Cluj	New lease
Arcese	5,000	WDP Park Cluj	Renewal
Sameday	3,600	Urbano Gilau	Renewal

TAKE-UP EVOLUTION (SQ. M)



PITESTI

Total Stock

317,900 SQ. M

New Supply 2025 – H1 2026

9,500 SQ. M

Gross Take-up 2025 – H1 2026

11,800 SQ. M

Under Construction Pipeline

–

Prime Rent

4.50 EUR/SQ. M/month

Vacancy Rate

0%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026)	City: 141,275 County: 569,932
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Labour Force (2026)	154,800
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Unemployed Population (2026)	10,000
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Unemployment Rate (2026F)	4.6%
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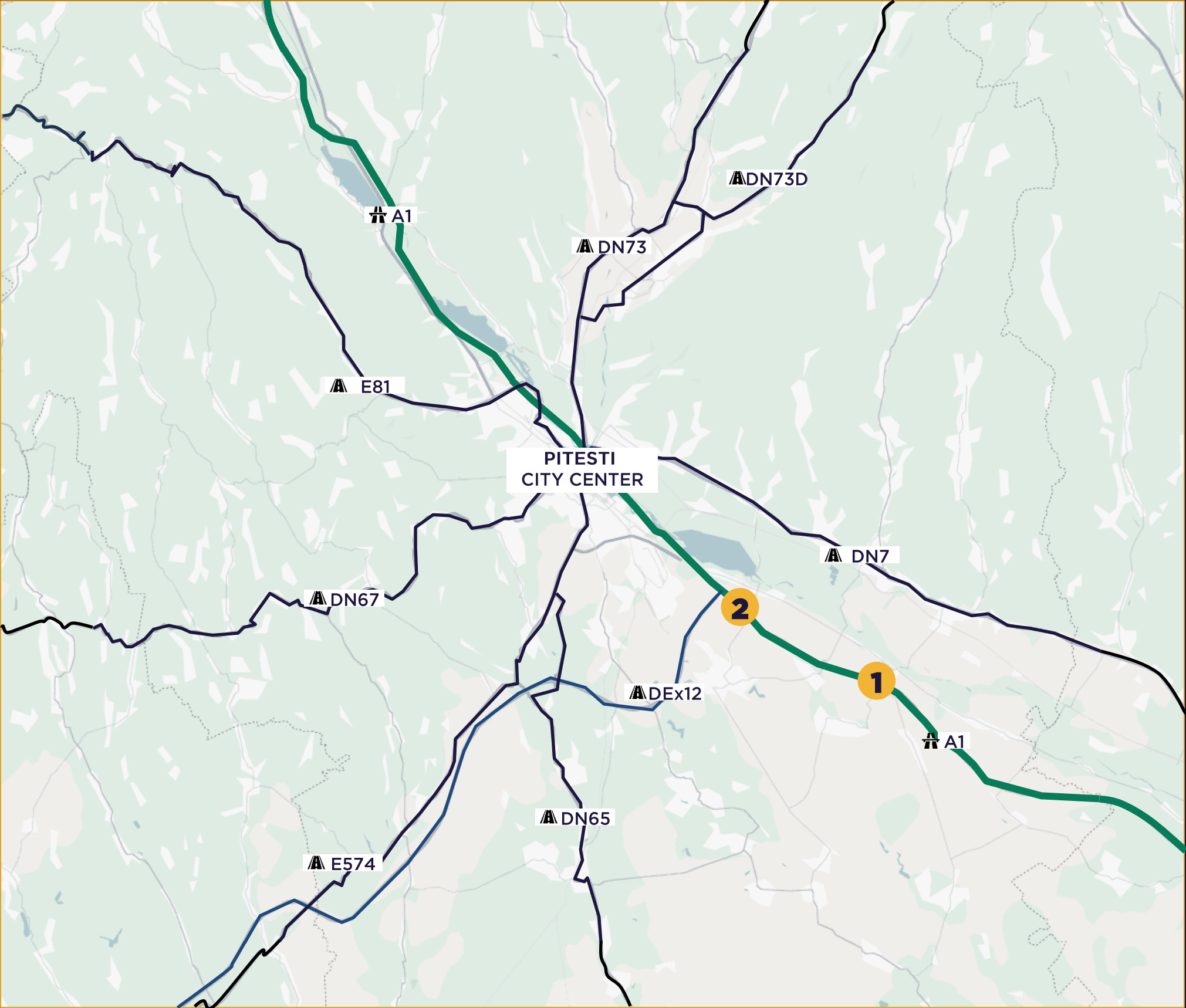
Average Net Monthly Income (EUR)	1,024
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GDP 2026F (bn. EUR)	10.0
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GDP/ CAPITA 2026F (EUR)	17,835
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FDI Stock 2025 (bn. EUR)	1.8
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

1 CTPARK PITESTI EAST

2 WDP PARK PITESTI (Oarja)

ARAD

Total Stock

235,800 SQ. M

New Supply 2025 – H1 2026

22,000 SQ. M

Gross Take-up 2025 – H1 2026

29,100 SQ. M

Under Construction Pipeline

–

Prime Rent

4.50 EUR/SQ. M/month

Vacancy Rate

18.1%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026)	City: 145,078 County: 410,143
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Labour Force (2026)	128,100
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Unemployed Population (2026)	4,300
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Unemployment Rate (2026F)	2.3%
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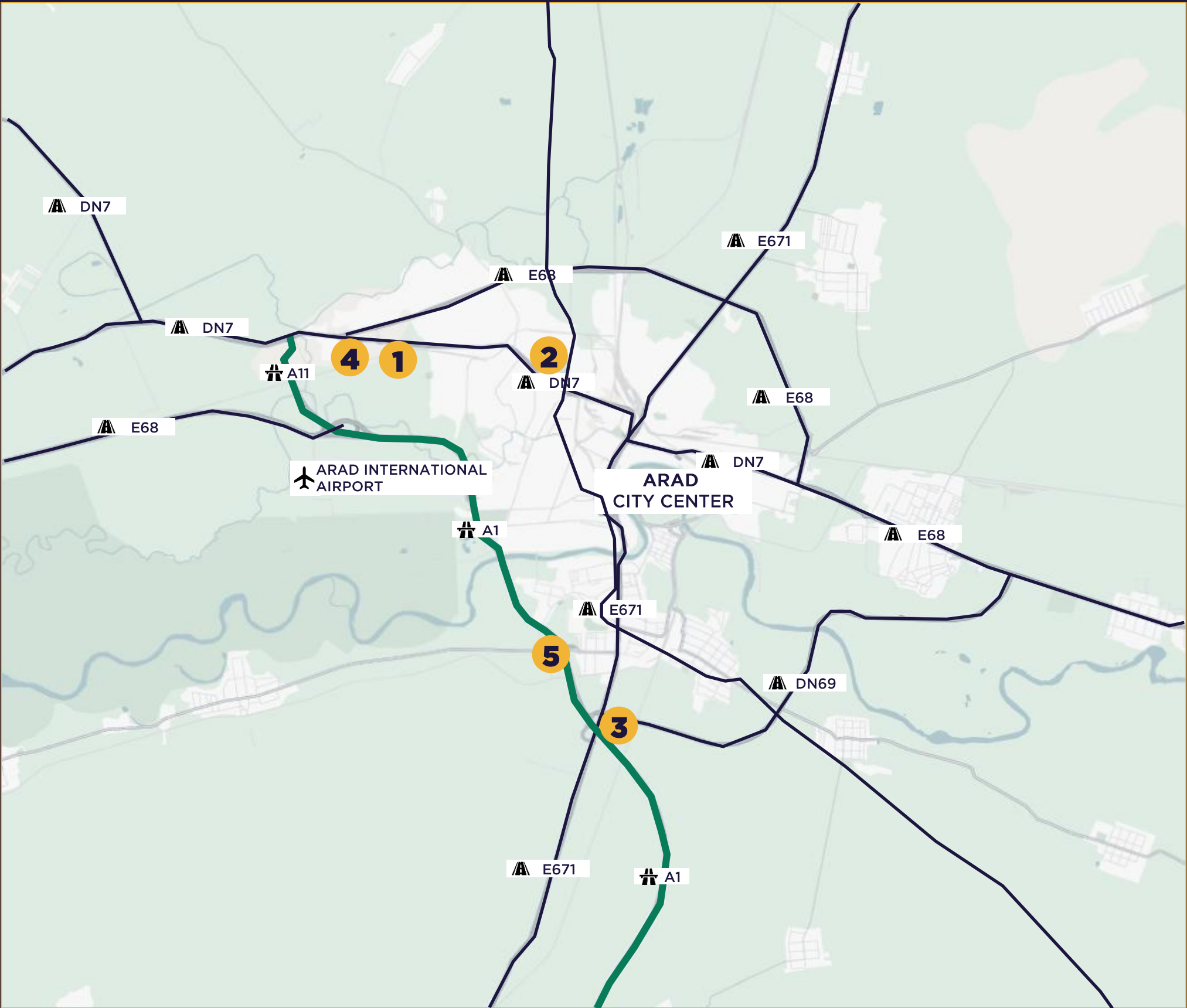
Average Net Monthly Income (EUR)	924
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GDP 2026F (bn. EUR)	7.84
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GDP/ CAPITA 2026F (EUR)	19,072
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FDI Stock 2025 (bn. EUR)	1.6
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

- | | | | |
|---|------------------|---|--------------------|
| 1 | CTPARK ARAD WEST | 4 | INDUSTRA PARK ARAD |
| 2 | WDP PARK ARAD | 5 | CTPARK ARAD SOUTH |
| 3 | VGP PARK ARAD | | |

ORADEA

Total Stock

197,600 SQ. M

New Supply 2025 – H1 2026

-

Gross Take-up 2025 – H1 2026

47,600 SQ. M

Under Construction Pipeline

-

Prime Rent

4.50 EUR/SQ. M/month

Vacancy Rate

1.7%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026)	City: 183,105 County: 551,297
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Labour Force (2026)	171,100
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Unemployed Population (2026)	5,300
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Unemployment Rate (2026F)	2.3%
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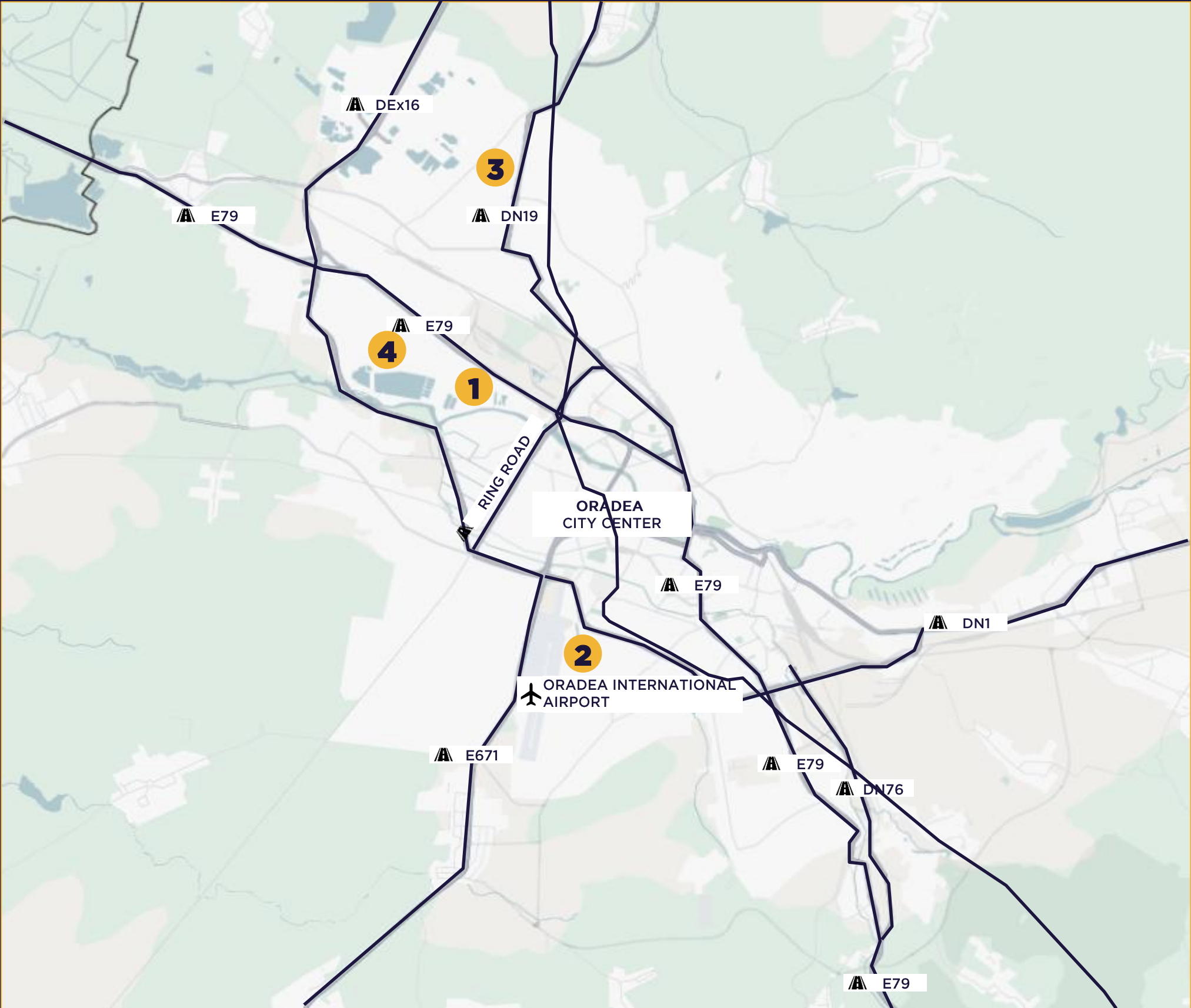
Average Net Monthly Income (EUR)	889
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GDP 2026F (bn. EUR)	8.88
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GDP/ CAPITA 2026F (EUR)	15,917
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FDI Stock 2025 (bn. EUR)	2.0
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

- 1 CTPARK ORADEA NORTH
- 2 CTPARK ORADEA CARGO TERMINAL
- 3 VGP PARK ORADEA
- 4 WDP PARK ORADEA SOGEFI

SIBIU

Total Stock

193,100 SQ. M

New Supply 2025 – H1 2026

13,500 SQ. M

Gross Take-up 2025 – H1 2026

41,500 SQ. M

Under Construction Pipeline

15,000 SQ. M

Prime Rent

4.50 EUR/SQ. M/month

Vacancy Rate

14.0%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026) City: 134,308
County: 388,325

Labour Force (2026) 138,600

Unemployed Population (2026) 6,000

Unemployment Rate (2026F) 3.2%

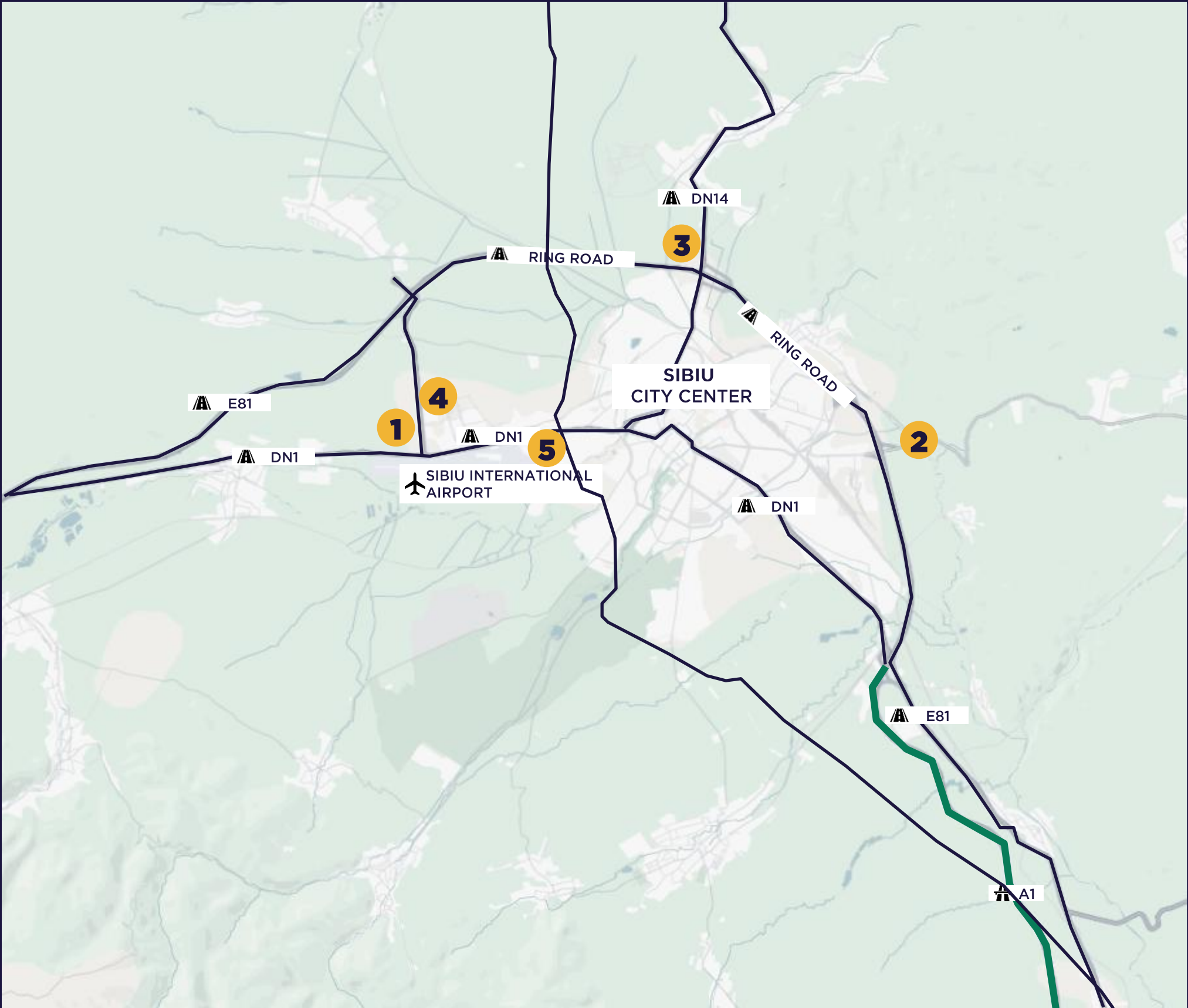
Average Net Monthly Income (EUR) 1.08

GDP 2026F (bn. EUR) 8.9

GDP/ CAPITA 2026F (EUR) 22,492

FDI Stock 2025 (bn. EUR) 2.3

Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

1 CTPARK SIBIU

2 CTPARK SIBIU EAST

3 VGP PARK SIBIU

4 WDP PARK SIBIU

5 ZACARIA INDUSTRIAL PARK

CRAIOVA

Total Stock

129,800 SQ. M

New Supply 2025 – H1 2026

12,000 SQ. M

Gross Take-up 2025 – H1 2026

23,600 SQ. M

Under Construction Pipeline

–

Prime Rent

4.50 EUR/SQ. M/month

Vacancy Rate

9.2%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026)	City: 234,140 County: 599,442
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Labour Force (2026)	141,200
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Unemployed Population (2026)	20,100
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Unemployment Rate (2026F)	8.8%
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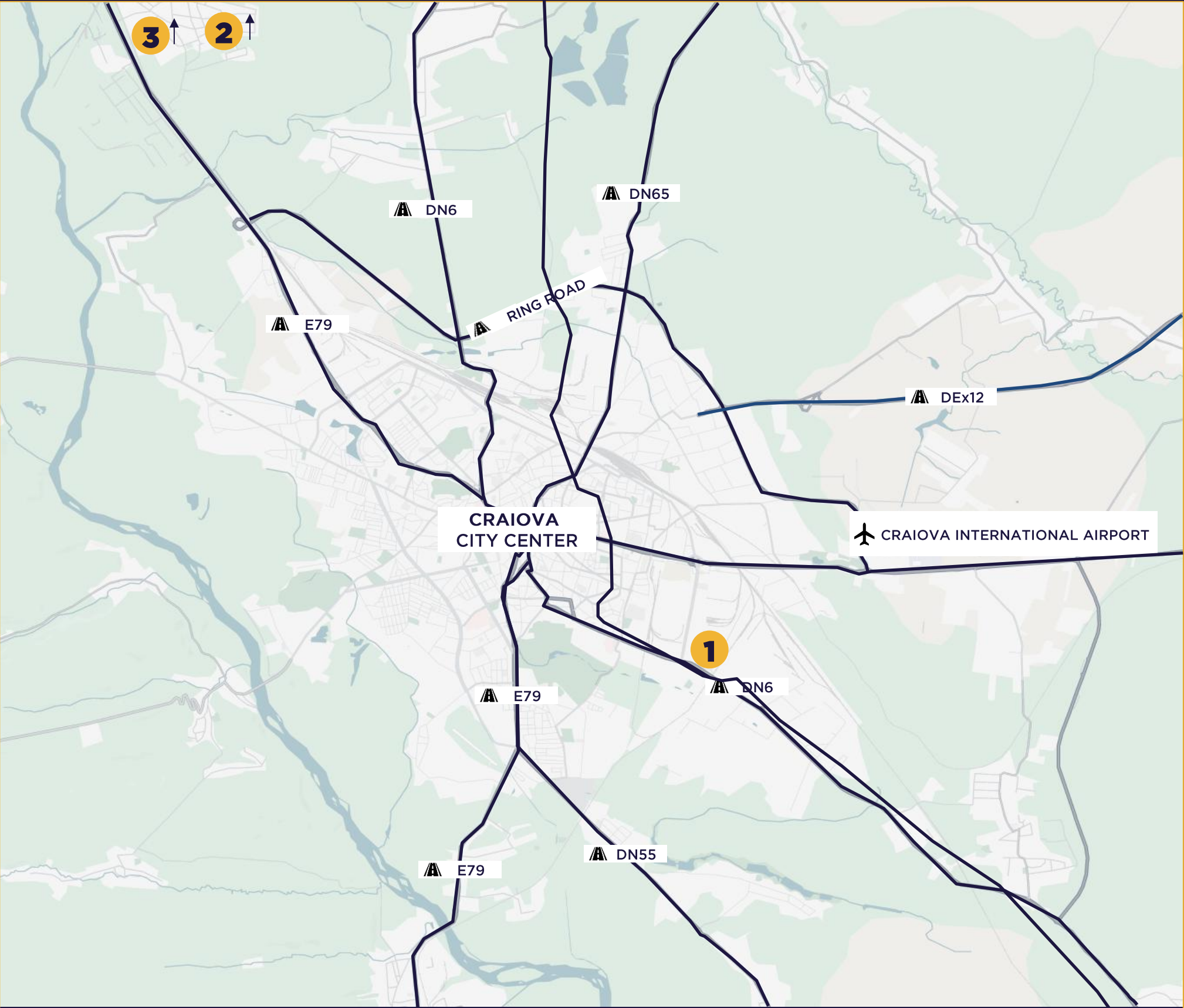
Average Net Monthly Income (EUR)	976
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GDP 2026F (bn. EUR)	9.75
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GDP/ CAPITA 2026F (EUR)	16,407
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FDI Stock 2025 (bn. EUR)	1.6
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

- 1 CTPARK CRAIOVA
- 2 WDP PARK CRAIOVA (Almaj)
- 3 CRAIOVA INDUSTRIAL HUB (Almaj)

IASI

Total Stock

94,800 SQ. M

New Supply 2025 – H1 2026

20,000 SQ. M

Gross Take-up 2025 – H1 2026

18,200 SQ. M

Under Construction Pipeline

40,000 SQ. M

Prime Rent

4.50 EUR/SQ. M/month

Vacancy Rate

11.6%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026)	City: 271,692 County: 760,774
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Labour Force (2026)	186,800
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Unemployed Population (2026)	9,700
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Unemployment Rate (2026F)	3.6%
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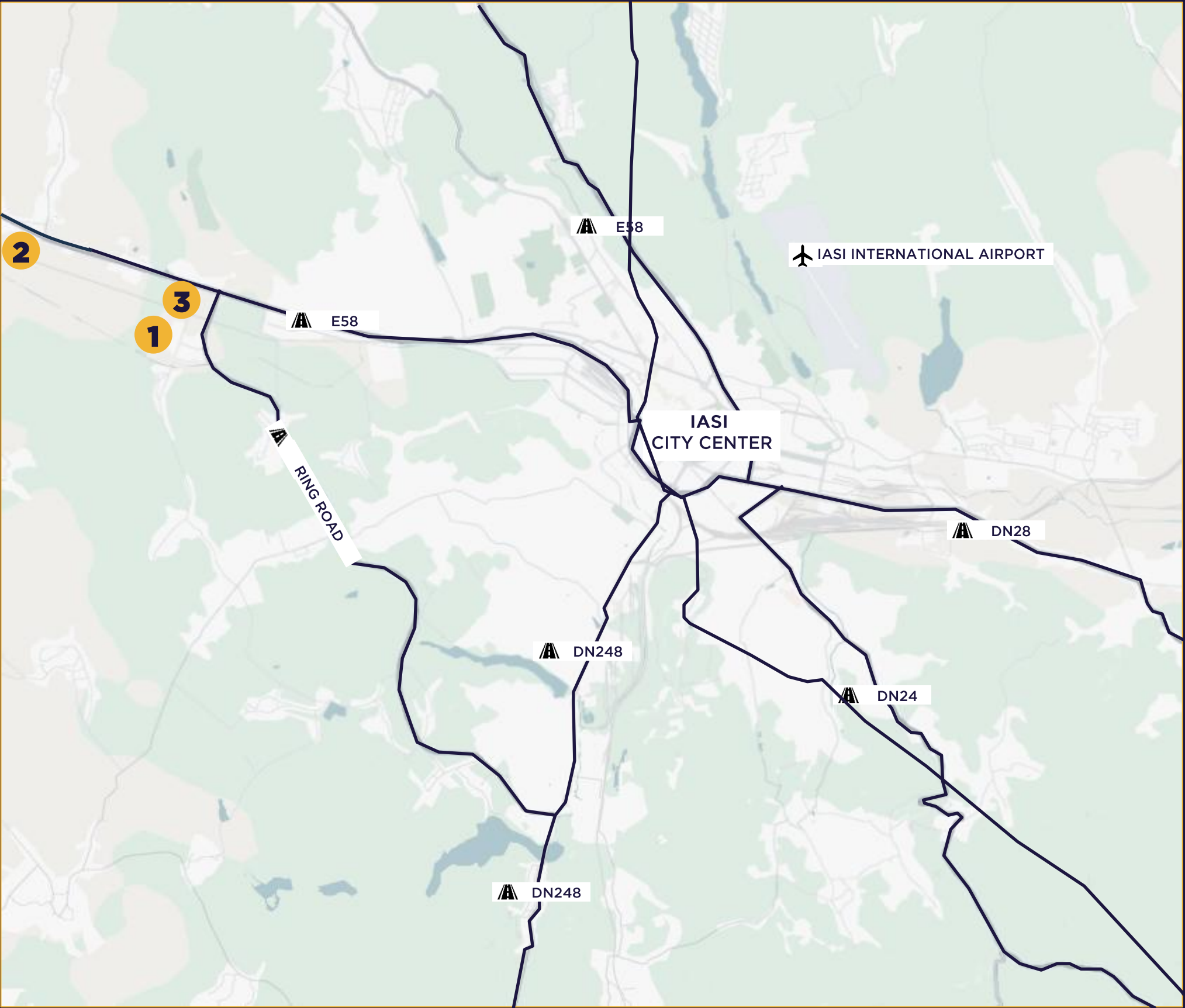
Average Net Monthly Income (EUR)	1,099
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GDP 2026F (bn. EUR)	8.73
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GDP/ CAPITA 2026F (EUR)	17,300
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FDI Stock 2025 (bn. EUR)	0.9
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

- 1 ELI PARK IASI
- 2 INDUSTRA PARK IASI
- 3 PROINVEST PARK MIROSLAVA

BACAU

Total Stock

64,700 SQ. M

New Supply 2025 – H1 2026

–

Gross Take-up 2025 – H1 2026

37,400 SQ. M

Under Construction Pipeline

–

Prime Rent

4.50 EUR/SQ. M/month

Vacancy Rate

10.0%

MACROECONOMIC & DEMOGRAPHIC COUNTY

Total Population (2026)	City: 136,102 County: 601,387
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Labour Force (2026)	121,900
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Unemployed Population (2026)	3,100
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Unemployment Rate (2026F)	1.7%
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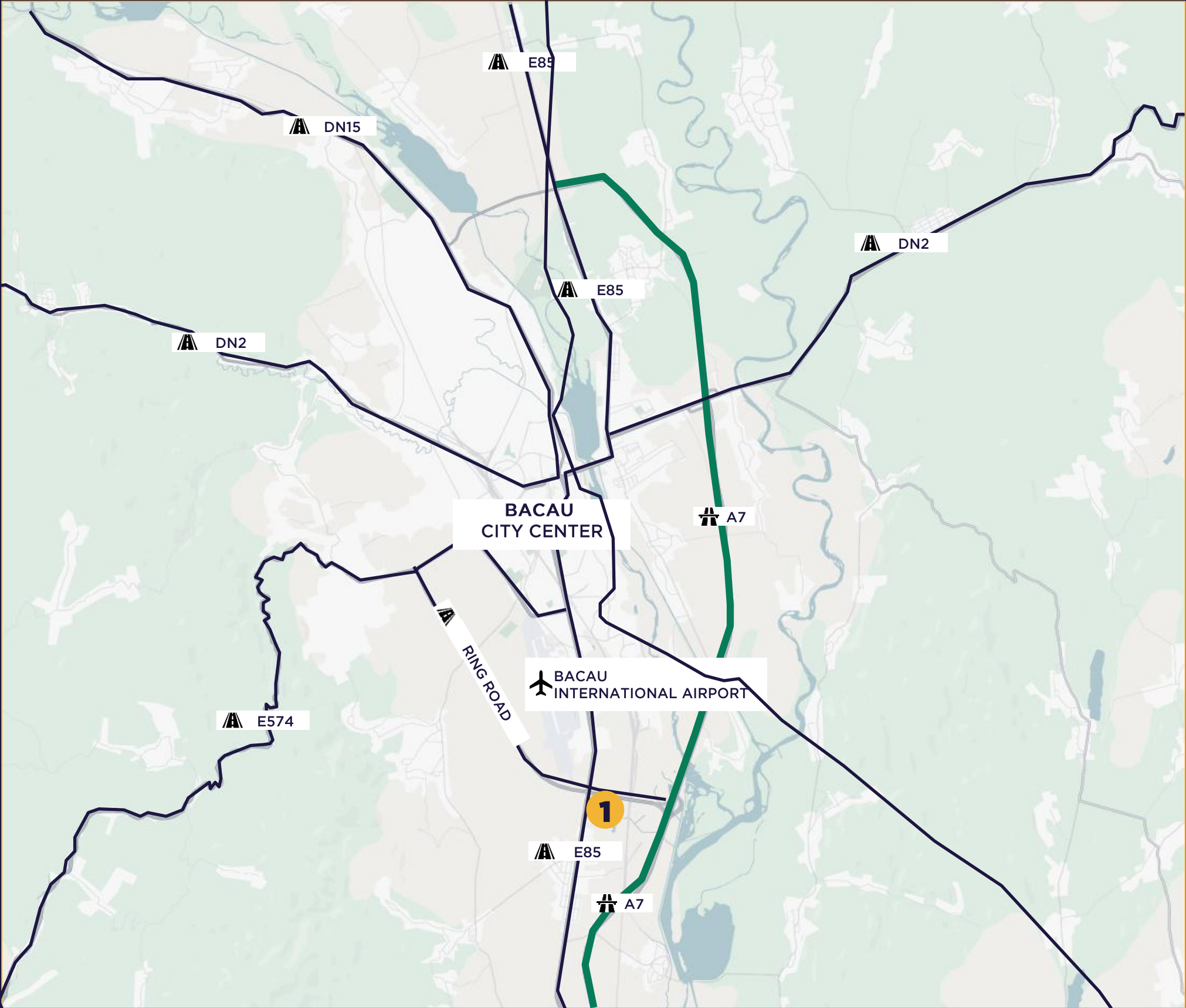
Average Net Monthly Income (EUR)	971
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GDP 2026F (bn. EUR)	13.55
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GDP/ CAPITA 2026F (EUR)	14,802
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FDI Stock 2025 (bn. EUR)	0.7
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Source: National Commission for Prognosis, National Institute of Statistics, National Bank of Romania



LEGEND – MAJOR PARKS

1 ELI PARK BACAU



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