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Romania Warehouse Market Report

H1 2026

Romania's logistics market hits record demand and nears the 8-million-m^2 mark before shifting into consolidation

Bucharest · Cluj-Napoca · Timișoara · Iași · Brașov

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National overview — Romania Warehouse

Romania's industrial and logistics sector delivered a record 2025. Total modern stock reached roughly 7.9–8.0 million m^2 by year-end, with Bucharest–Ilfov and the West region accounting for more than half. Gross take-up was exceptional: Cushman & Wakefield Echinox recorded 1,275,200 m^2 of leasing for the full year (~51% up on 2024), while Colliers tracked publicly announced deals near 1 million m^2. Prime BTS warehouse rents in Bucharest and the main cities stabilised around €4.5–5.0/m^2/month (≈€54–60/m^2/year). National vacancy eased to about 5.3% in Q4. CTP and WDP together control roughly two-thirds of the market.

PRIME RENT CITED
€54–60/m^2/yr
Colliers · Q4 2025

PRIME YIELD ESTIMATE
7.75%
Est. · Colliers cite prime industrial yields ~7.75% (H1 2025 range 7.25–7.75%), above the CEE average

VACANCY RATE CITED
5.3%
Cushman & Wakefield Echinox · Q4 2025

TAKE-UP CITED
990,400–1,275,200 m^2
Cushman & Wakefield Echinox · FY 2025

PIPELINE CITED
350,000–464,000 m^2
Cushman & Wakefield Echinox · under construction / 2026F deliveries

TOTAL STOCK CITED
7,900,000–8,000,000 m^2
Cushman & Wakefield Echinox · Q4 2025

PRIME RENT BY CITY (€/M^2/YR)

City	Prime rent
Bucharest	€54–60/m^2/yr
Cluj-Napoca	€54–60/m^2/yr est
Timișoara	€54–60/m^2/yr est
Iași	€54–60/m^2/yr est
Brașov	€54–60/m^2/yr est

PRIME YIELD BY CITY (%)

City	Prime yield
Bucharest	7.75% est
Cluj-Napoca	*not published*
Timișoara	*not published*
Iași	*not published*
Brașov	*not published*

Outlook. After a record year, the market is entering consolidation. About 464,000 m^2 is scheduled through end-2026 — Bucharest capturing an estimated 64% — with an under-construction pipeline near 350,000 m². Rents should stay broadly stable given disciplined, largely pre-let development, while prime yields around 7.75% keep Romanian logistics attractive versus tighter-priced CEE peers.

Methodology & data provenance

Every figure in this report is attributed to named commercial real-estate research, marked as a labelled estimate, or shown as “not published”. Nothing is stated without provenance.

CITED FIGURES	LABELLED ESTIMATES	NOT PUBLISHED
6	**8**	**22**
from third-party research	interpolated, basis stated	no source this period

CITED

Sourced from research houses

Prime rent, yield, vacancy, take-up, pipeline and stock are drawn from published market reports by leading research houses such as JLL, CBRE, Cushman & Wakefield, Colliers, BNP Paribas Real Estate, Savills and Knight Frank. The specific sources used in this report are named on the Sources page. Where a house quotes a range (e.g. a prime-yield band), the range is shown. Each figure carries its source and as-of period.

- **Prime rent** — Top achievable rent, best-in-class space (€/m²/yr).
- **Prime yield** — Net initial yield, prime fully-let asset (%).
- **Vacancy rate** — Vacant ÷ total stock (%).
- **Take-up** — Space leased in the period (m²).
- **Pipeline** — Under construction / to be delivered (m²).
- **Total stock** — Total modern stock (m²).

ESTIMATE

Estimates & gaps

The major research houses cover capital cities and the primary axes closely, but publish little for smaller regional markets. Where no figure is published, we either show “not published” or a clearly-tagged estimate range with its basis stated on the figure (typically interpolation from the national prime and a regional discount). Estimates are our own and are never presented as third-party data.

Reporting periods differ by source (e.g. Q1 2026, H2 2025, FY 2025); each figure shows its own as-of date. Data compiled 2026-07-02, market data as of Q4 2025 – Q1 2026 (latest published).

City markets

Bucharest

București · 4 of 6 metrics published

> Dominant hub (Bucharest–Ilfov). Prime BTS rent €4.5–5.0/m²/month; set to capture ~64% of 2026 new supply.

PRIME RENT CITED

€54–60/m²/yr

Colliers · Q4 2025

PRIME YIELD ESTIMATE

7.75%

Est. · National prime industrial yield ~7.75% (Colliers)

VACANCY RATE ESTIMATE

5.3%

Est. · National vacancy 5.3% (Q4 2025); Bucharest–Ilfov the largest sub-market, no separate figure published

TAKE-UP

not published

PIPELINE ESTIMATE

297,000 m²

Est. · ~64% of the ~464,000 m² 2026 national deliveries expected in Bucharest

TOTAL STOCK

not published

Cluj-Napoca

1 of 6 metrics published

> Regional logistics node; prime BTS rents aligned with national €4.5–5.0/m²/month. No city-specific disaggregated data published.

PRIME RENT ESTIMATE

€54–60/m²/yr

Est. · Prime BTS rent €4.5–5.0/m²/month applies to Bucharest and the country's main cities including Cluj

PRIME YIELD

not published

VACANCY RATE

not published

TAKE-UP

not published

PIPELINE

not published

TOTAL STOCK

not published

City markets

Timișoara

1 of 6 metrics published

Part of the West region, which with Bucharest–Ilfov accounts for >50% of national stock. Prime BTS rent ~€4.5–5.0/m²/month.

PRIME RENT ESTIMATE

€54–60/m²/yr

Est. · Prime BTS rent €4.5–5.0/m²/month applies to the main cities including Timișoara/West region

PRIME YIELD

not published

VACANCY RATE

not published

TAKE-UP

not published

PIPELINE

not published

TOTAL STOCK

not published

Iași

1 of 6 metrics published

Eastern logistics market; prime BTS rents broadly in line with national €4.5–5.0/m²/month. No disaggregated city data published.

PRIME RENT ESTIMATE

€54–60/m²/yr

Est. · Prime BTS rent €4.5–5.0/m²/month cited for Bucharest and main cities

PRIME YIELD

not published

VACANCY RATE

not published

TAKE-UP

not published

PIPELINE

not published

TOTAL STOCK

not published

City markets

Brașov 1 of 6 metrics published

Central Romania logistics market; prime BTS rents broadly in line with national €4.5–5.0/m²/month. No disaggregated city data published.

PRIME RENT ESTIMATE

€54–60/m²/yr

Est. · Prime BTS rent €4.5–5.0/m²/month cited for Bucharest and main cities

PRIME YIELD

not published

VACANCY RATE

not published

TAKE-UP

not published

PIPELINE

not published

TOTAL STOCK

not published

Sources & disclaimer

CITED THIRD-PARTY RESEARCH

- **Cushman & Wakefield Echinox** — Romania Industrial & Logistics Market 2025 / MarketBeat Q4 2025 (Q4 2025 / FY 2025).
  https://cwechinox.com/the-industrial-and-logistics-stock-in-romania-will-reach-the-8-million-sq-m-landmark-at-the-end-of-2025-if-the-current-development-pace-is-maintained-bucharest-ilfov-and-the-west-region-account-f/
- **Colliers** — Industrial Market — Market Report 2026 (Q4 2025).
  https://market-report.colliers.ro/industrial-market/

Disclaimer. Figures are attributed to the third-party research houses named above and reflect their respective definitions and reporting periods; WarehouseRentInfo does not warrant their accuracy. Figures tagged “estimate” are WarehouseRentInfo’s own labelled approximations for markets where no figure is published, and must not be read as third-party data. Reporting periods and market definitions differ between houses. This report is provided for information only and does not constitute investment, valuation or letting advice.