

ROMANIA

INDUSTRIAL & LOGISTICS MARKET

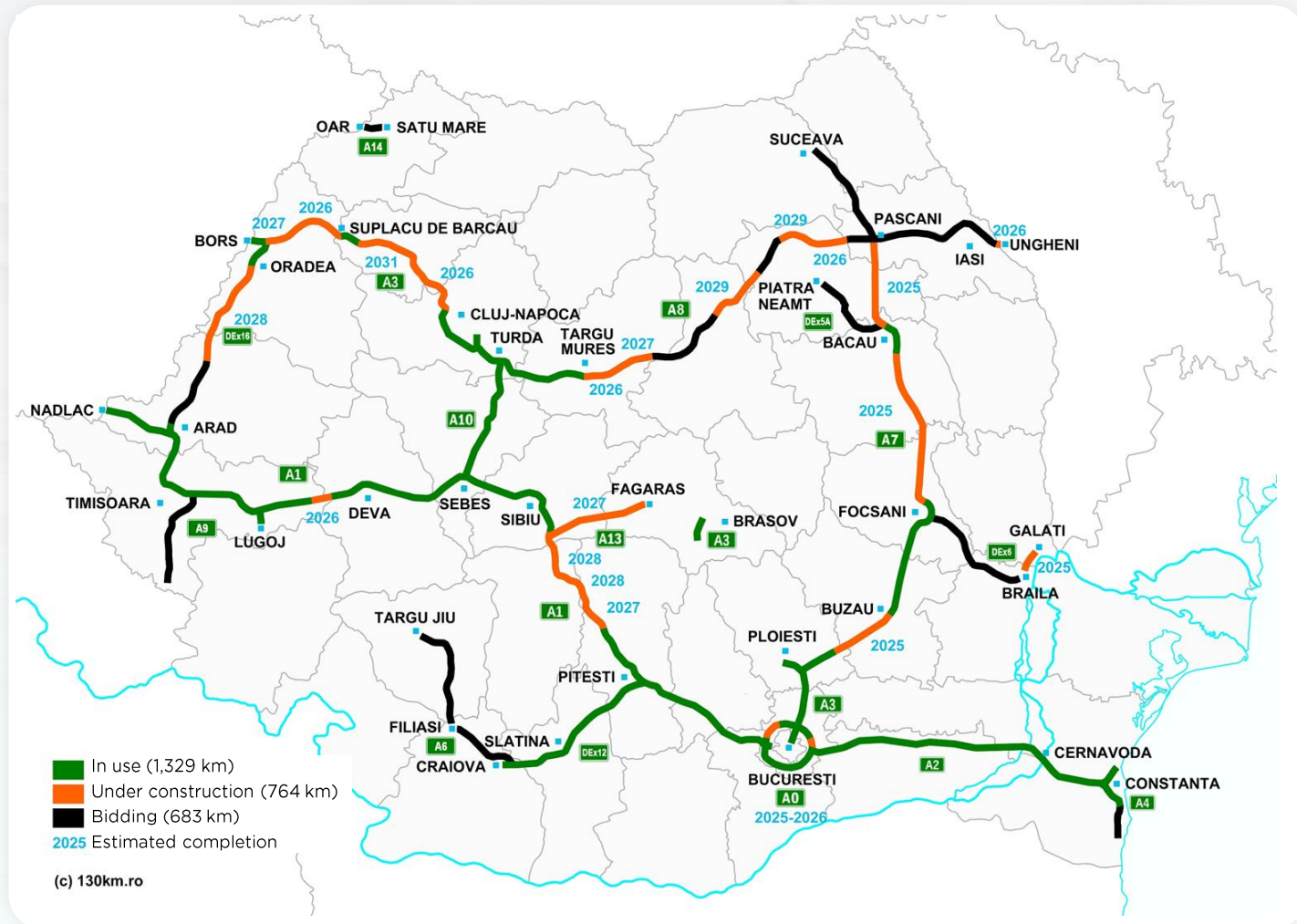
2025

Better never settles



ROMANIA

INDUSTRIAL & LOGISTICS MARKET



LOCATION: CEE Region
AREA: 238,397 sq. km
POPULATION: 19,036,031 inhabitants*
UNEMPLOYMENT RATE: 3.2%**
AVERAGE NET MONTHLY INCOME: €1,098**
GDP/ CAPITA: €19,900*
EXPORTS: €92.7 billion*
FDI STOCK: €118.2 billion
LABOUR FORCE: 5.47 million**

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

* 2025

** June 2025

ROMANIA

INDUSTRIAL & LOGISTICS MARKET



7,752,700 sq. m

Stock at the end of H1 2025



764,100 sq. m

New supply in 2024 – H1 2025



1,357,200 sq. m

Gross take - up in 2024 – H1 2025



5.8%

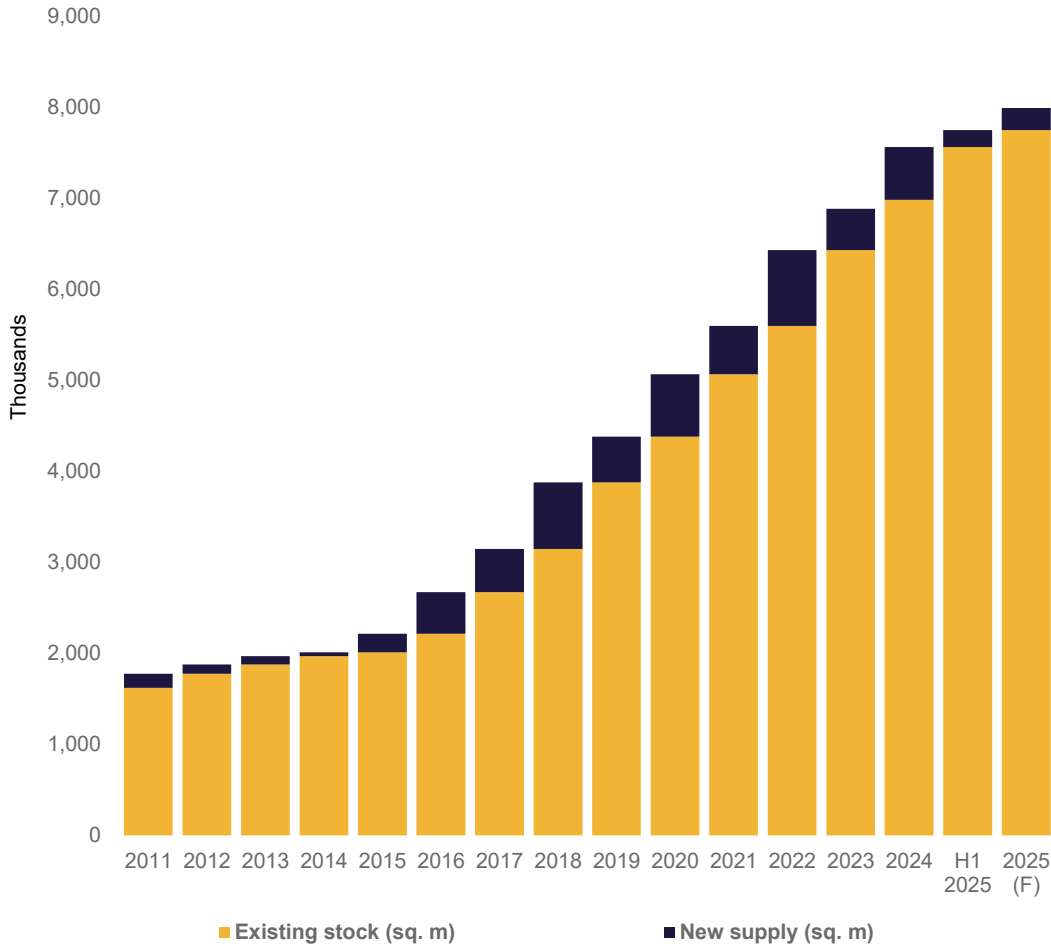
Vacancy rate at national level at the end of H1 2025



438,100 sq. m

Under construction pipeline

STOCK EVOLUTION (SQ. M)



ROMANIA

INDUSTRIAL & LOGISTICS MARKET

ROMANIA MARKETS

REGIONS	POPULATION	NEW SUPPLY 2024 - H1 2025 (SQ. M)	STOCK H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Bucharest - Ilfov	2,313,519	205,600	3,674,600	367,100
West	1,670,355	142,000	1,168,400	-
Center	2,290,237	106,400	726,900	45,000
North - West	2,542,793	43,000	679,600	-
North - East	3,217,989	50,200	215,900	20,000
South - East	2,330,116	5,200	124,100	-
South - Muntenia	2,824,068	157,200	882,800	-
South - West Oltenia	1,846,904	54,500	280,400	6,000

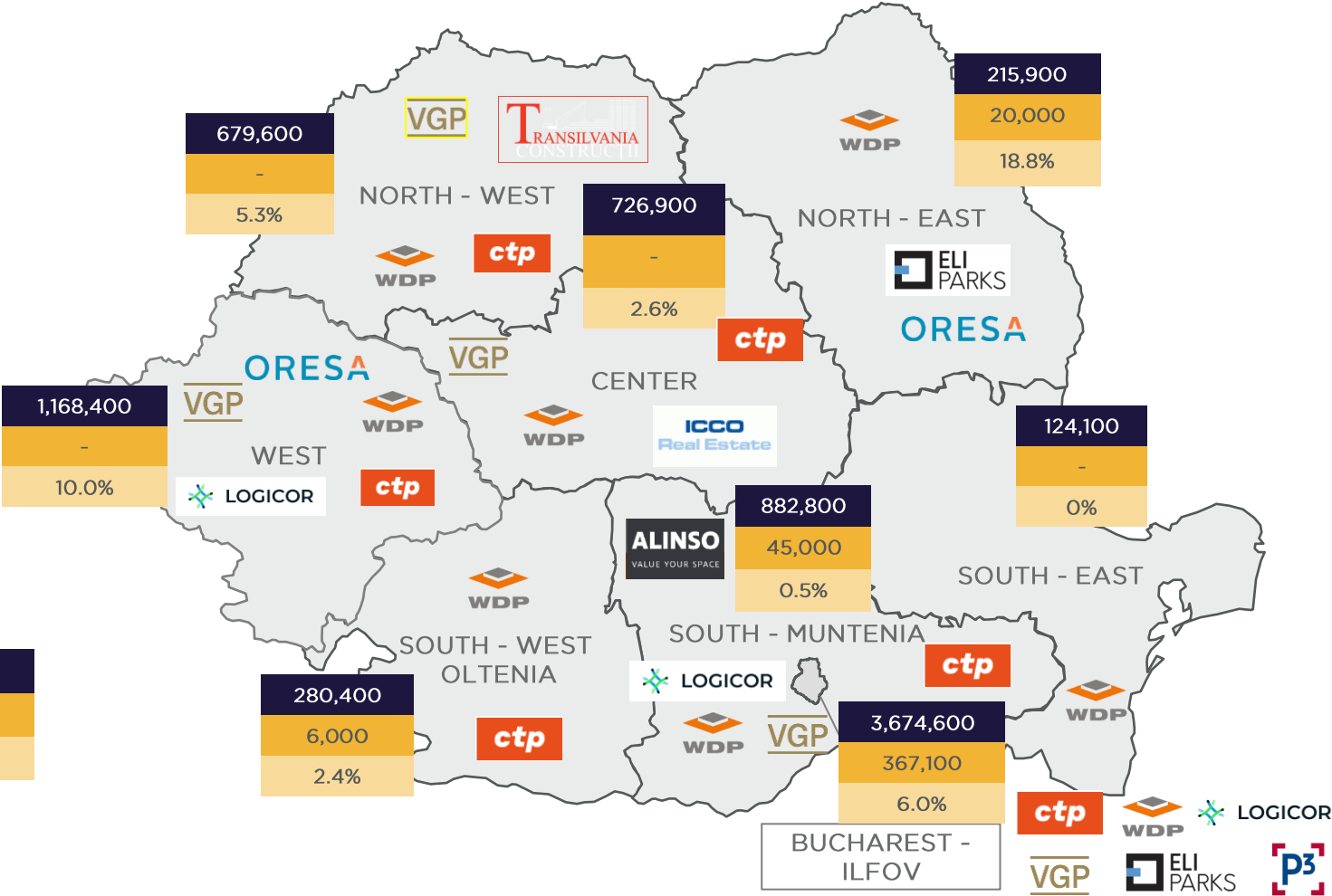
MAJOR PLAYERS

DEVELOPER	COUNTRY OF ORIGIN	PORTFOLIO (SQ. M)
CTP	Netherlands	3,055,000
WDP	Belgium	1,886,000
VGP	Belgium	420,000
P3	Singapore	380,000
Logicor	China	325,000

Source: Cushman & Wakefield Echinox Research

ROMANIA

INDUSTRIAL & LOGISTICS MARKET



Source: Cushman & Wakefield Echinox Research

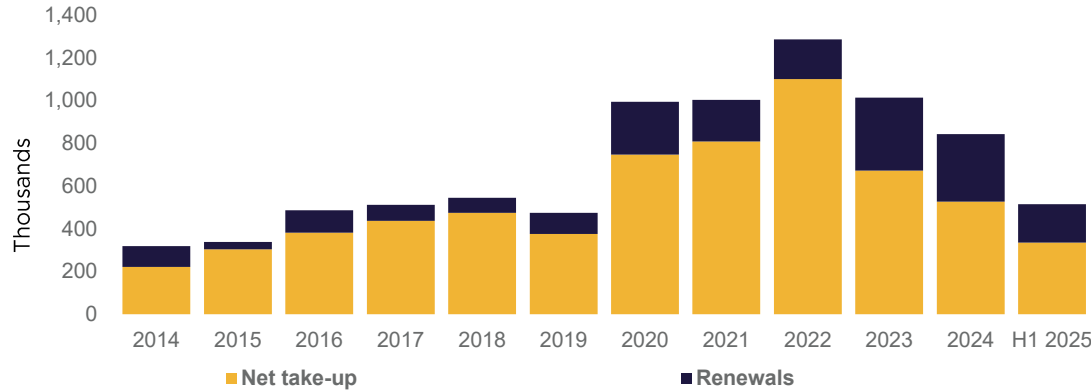
ROMANIA

INDUSTRIAL & LOGISTICS MARKET

MAJOR DEALS 2024 - H1 2025

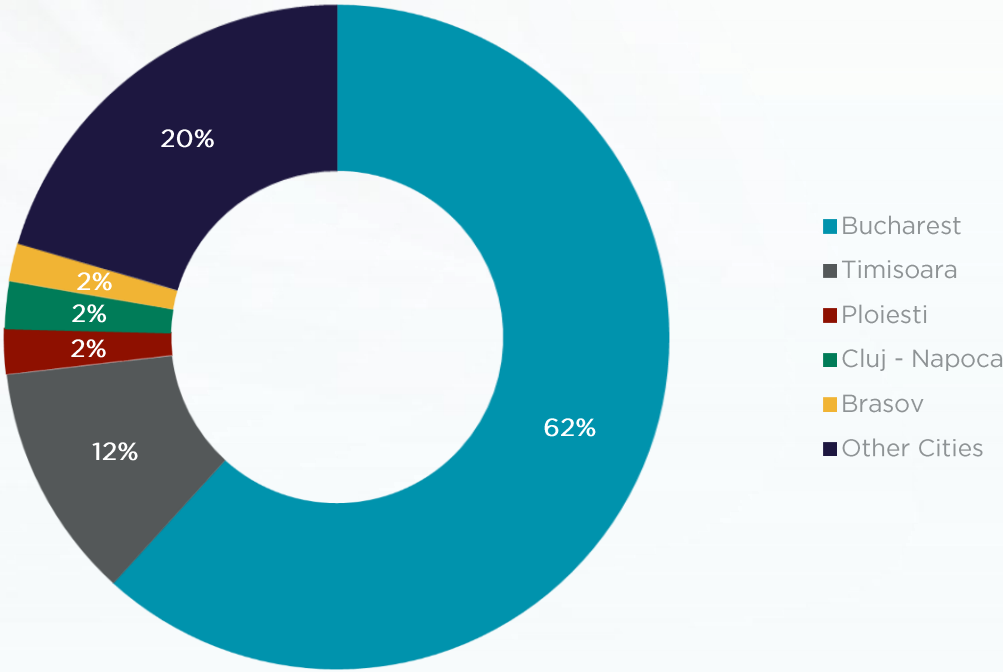
TENANT	GLA (SQ. M)	PROJECT	TYPE
LPP	131,000	CTPark Bucharest West	New lease + Expansion
Action	54,000	WDP Park Stefanesti	Pre - lease
Delamode	31,000	CTPark Bucharest	Renewal + Expansion
VAT	20,900	VGP Park Arad	Pre - lease
Deichmann	20,000	ELI Park 3 Bucharest	Pre - lease

TAKE-UP EVOLUTION (SQ. M)



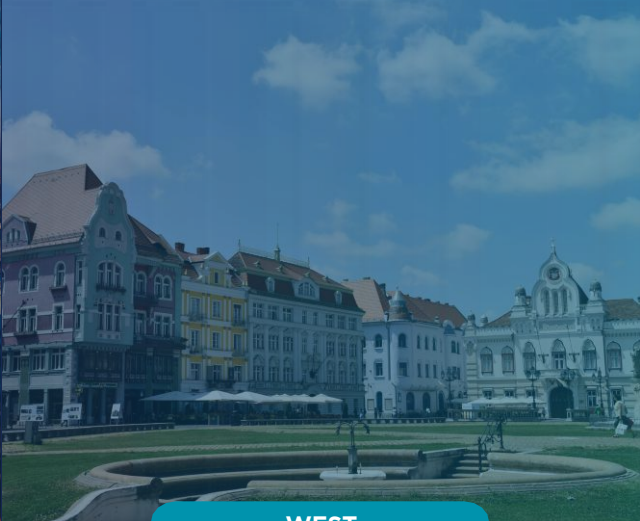
Source: Cushman & Wakefield Echinox Research

TAKE-UP 2024 - H1 2025

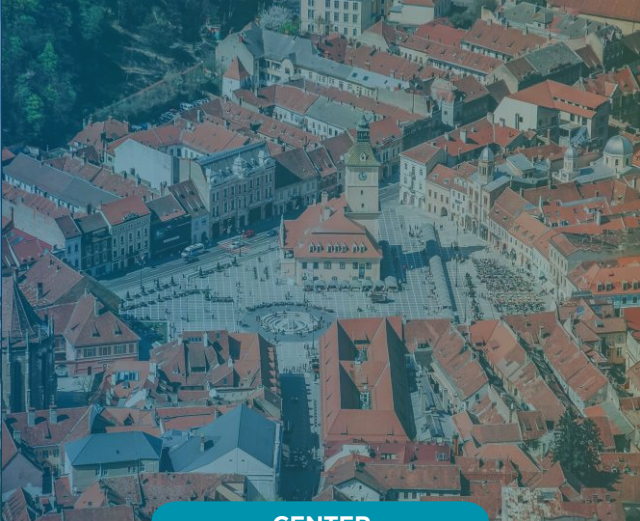




BUCHAREST - ILFOV



WEST



CENTER



NORTH - WEST

MARKET SPOTLIGHT

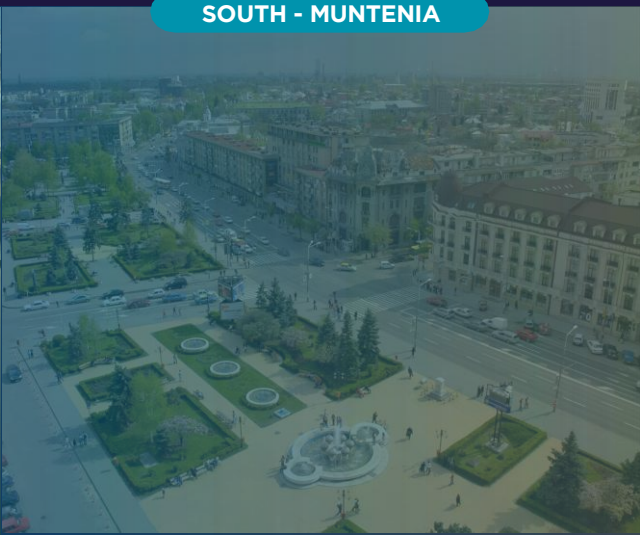
Click on a market name to learn more.



NORTH - EAST



SOUTH - EAST

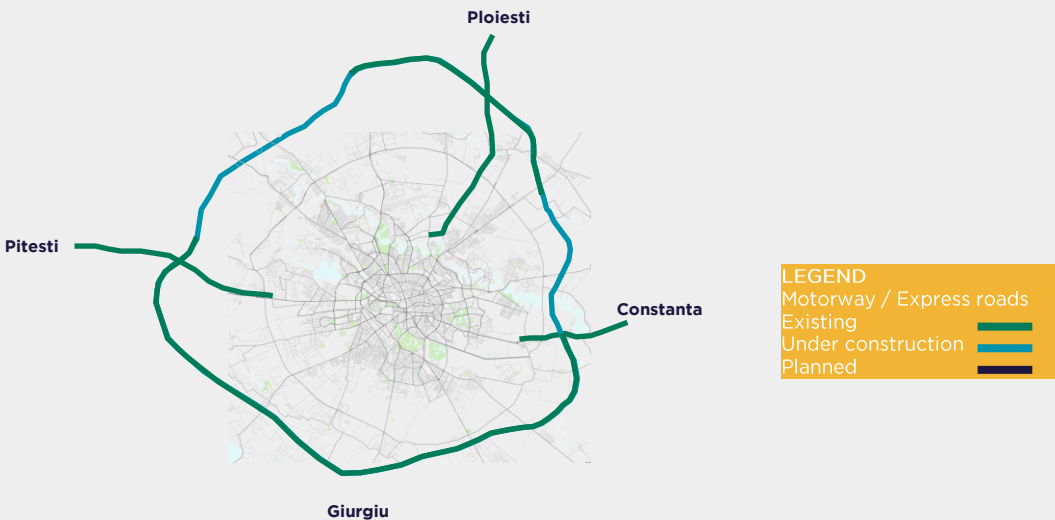


SOUTH - MUNTENIA



SOUTH - WEST OLTENIA

BUCHAREST - ILFOV



KEY FACTS



The highest GDP per capita in the country in 2024 (42,500 €), more than 2 times the national average



Romania's main logistics hub, directly connected to all major regions in the country



2nd largest city in the CEE and 8th largest city in the European Union by population

MACROECONOMIC & DEMOGRAPHIC		MAJOR CITIES	POPULATION
Total Population	2,313,519	Bucharest	1,716,983
Labour Force	1,218,800		
Students	172,200		
Unemployed Population	9,500		
Unemployment Rate	0.6%		
Average Net Monthly Income (€)	1,346		
GDP 2025 F (bn. €)	108.4		
GDP/ CAPITA 2025 F (€)	47,100		
GDP Growth (2025 F)	1.3%		
FDI Stock 2023 (bn. €)	75.4		

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

BUCHAREST - ILFOV

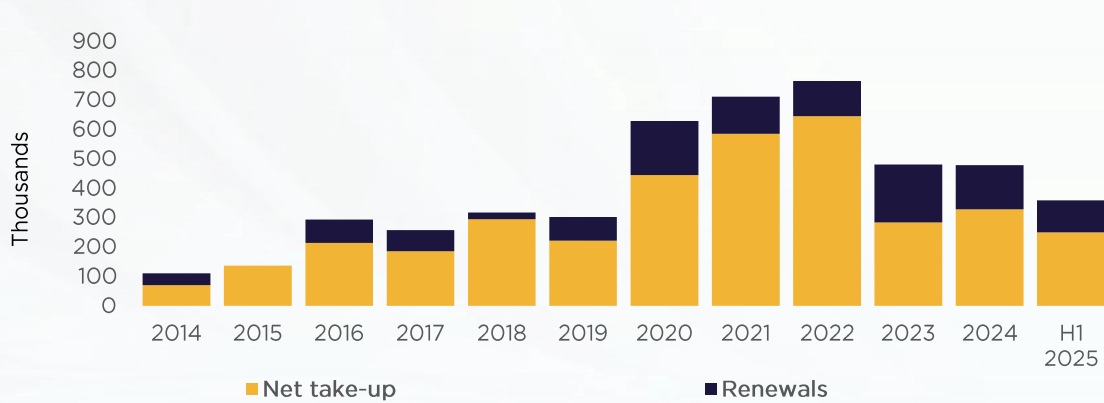
MARKET OVERVIEW

Total stock (sq. m)	3,674,600
Stock per capita (sq. m) (sq. m / 1,000 inhabitants)	1,588
New supply 2024 – H1 2025 (sq. m)	205,600
UC Pipeline (sq. m)	367,100
Take-up 2024 – H1 2025 (sq. m)	848,300
Vacancy rate	6.0%
Prime rental level (€ / sq. m/ month)	4.70

MAJOR INDUSTRIAL SUB-MARKETS

CITY	NEW SUPPLY 2024 – H1 2025 (SQ. M)	STOCK H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Bucharest	205,600	3,674,600	367,100

TAKE-UP EVOLUTION (SQ. M)



MAJOR DEALS 2024 – H1 2025

TENANT	GLA (SQ. M)	PROJECT	TYPE
LPP	131,000	CTPark Bucharest West	New lease + Expansion
Action	54,000	WDP Park Stefanesti	Pre - lease
Delamode	31,000	CTPark Bucharest	Renewal + Expansion
Deichmann	20,000	ELI Park 3	Pre - lease
NRF	20,000	MLP Bucharest West	New lease
Metro Cash & Carry	16,000	WDP Park Stefanesti	Pre - lease

Source: Cushman & Wakefield Echinox Research

BUCHAREST - ILFOV

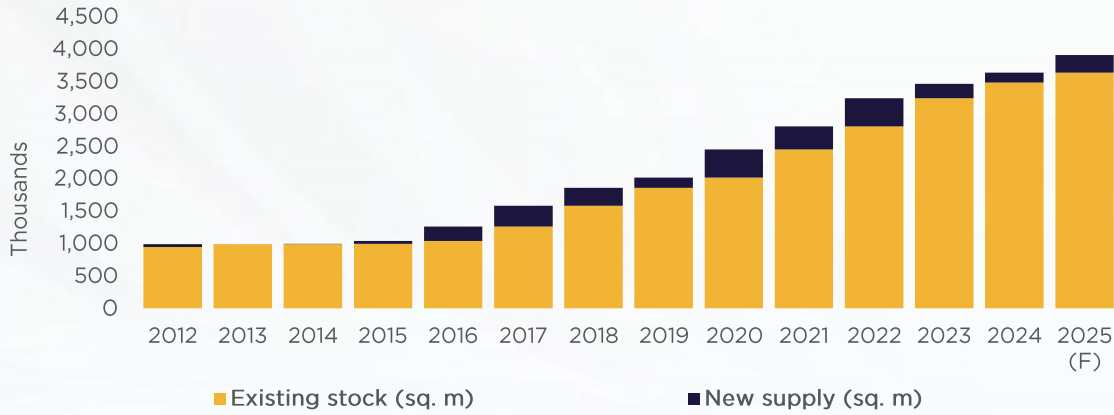
MAJOR PROJECTS

PROJECT	GLA (SQ. M)	OWNER
CTPark Bucharest West	939,000	CTP
CTPark Bucharest	567,000	CTP
P3 Park Bucharest	380,000	P3
WDP Park Stefanesti	347,000	WDP
CTPark Bucharest North	208,000	CTP
Logicor Mogosoaia	146,000	Logicor

MAJOR UNDER CONSTRUCTION PROJECTS

PROJECT	GLA (SQ. M)
CTPark Bucharest West	100,000
CTPark Bucharest South	54,000
WDP Park Stefanesti	54,000

STOCK EVOLUTION (SQ. M)



MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
CTP	1,905,000
WDP	519,000
P3	380,000
Logicor	252,000

WEST

TIMISOARA | ARAD | DEVA | CARANSEBES | CALAN



KEY FACTS



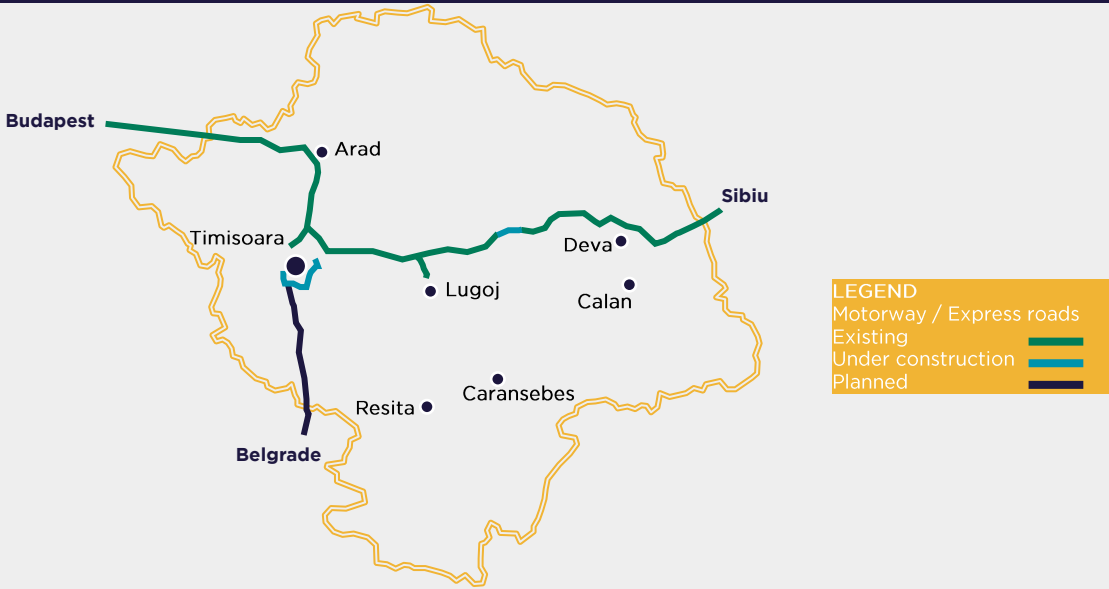
Excellent connection via A1 highway to Budapest and Western Europe



3rd after Bucharest and Center in terms of the total FDI stock



2 operational airports, in Timisoara and Arad



MACROECONOMIC & DEMOGRAPHIC	
Total Population	1,668,921
Labour Force	538,200
Students	59,000
Unemployed Population	17,000
Unemployment Rate	2.2%
Average Net Monthly Income (€)	979
GDP 2025 F (bn. €)	32.5
GDP/ CAPITA 2025 F (€)	19,700
GDP Growth (2025 F)	1.0%
FDI Stock 2023 (bn. €)	8.7

MAJOR CITIES	POPULATION
Timisoara	250,849
Arad	145,078
Resita	58,393
Deva	53,113
Hunedoara	50,457
Lugoj	35,450
Caransebes	21,714

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

WEST

TIMISOARA | ARAD | DEVA | CARANSEBES | CALAN

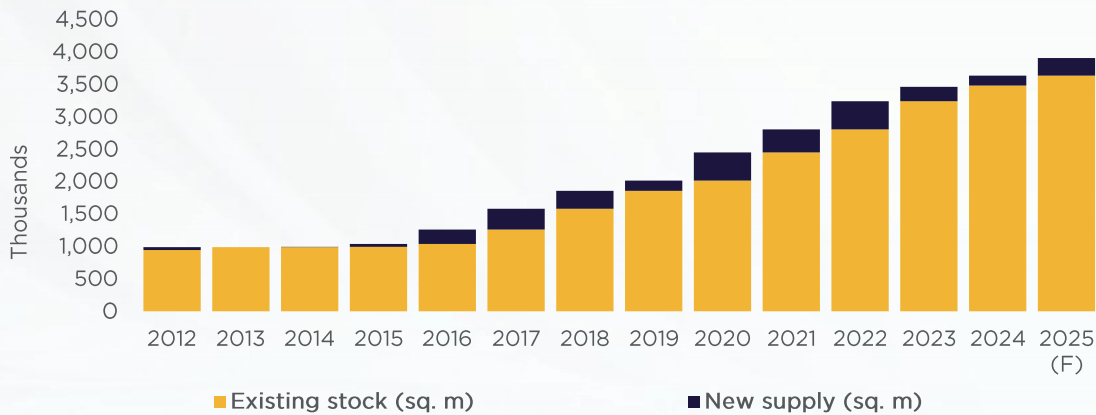
MARKET OVERVIEW

Total stock (sq. m)	1,168,400
Stock per capita (sq. m / 1,000 inhabitants)	699
New supply 2024 – H1 2025 (sq. m)	142,000
UC Pipeline (sq. m)	-
Take-up 2024 – H1 2025 (sq. m)	225,900
Vacancy rate	10.0%
Prime rental level (€ / sq. m/ month)	4.50

MAJOR INDUSTRIAL SUB-MARKETS

CITY	NEW SUPPLY 2024 – H1 2025 (SQ. M)	STOCK H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Timisoara	65,500	807,700	-
Arad	76,500	235,000	-
Deva	-	92,200	-
Calan	-	25,000	-
Caransebes	-	8,500	-
TOTAL	142,000	1,168,400	-

TAKE-UP EVOLUTION (SQ. M)



MAJOR DEALS 2024 – H1 2025

TENANT	GLA (SQ. M)	PROJECT	TYPE
VAT	20,900	VGP Park Timisoara	Pre - lease
Kyocera	16,000	CTPark Timisoara	Renewal
RPW Logistics	15,700	VGP Park Timisoara	Renewal/ Renegotiation
Sellpy	6,000	Oresa Arad	New lease

Source: Cushman & Wakefield Echinox Research

WEST

TIMISOARA | ARAD | DEVA | CARANSEBES | CALAN

MAJOR PROJECTS

PROJECT	GLA (SQ. M)	OWNER
CTPark Timisoara	310,000	CTP
VGP Park Timisoara	173,000	VGP
WDP Park Timisoara	170,000	WDP
CTPark Arad	110,000	CTP
CTPark Deva	47,000	CTP
WDP Park Deva	45,000	WDP

MAJOR UNDER CONSTRUCTION PROJECTS

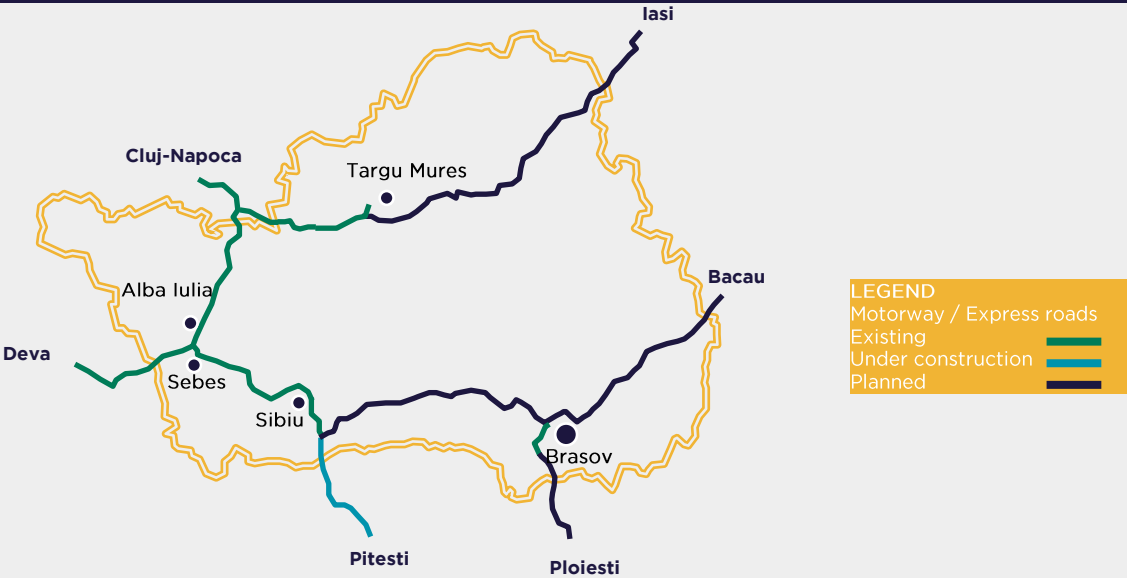
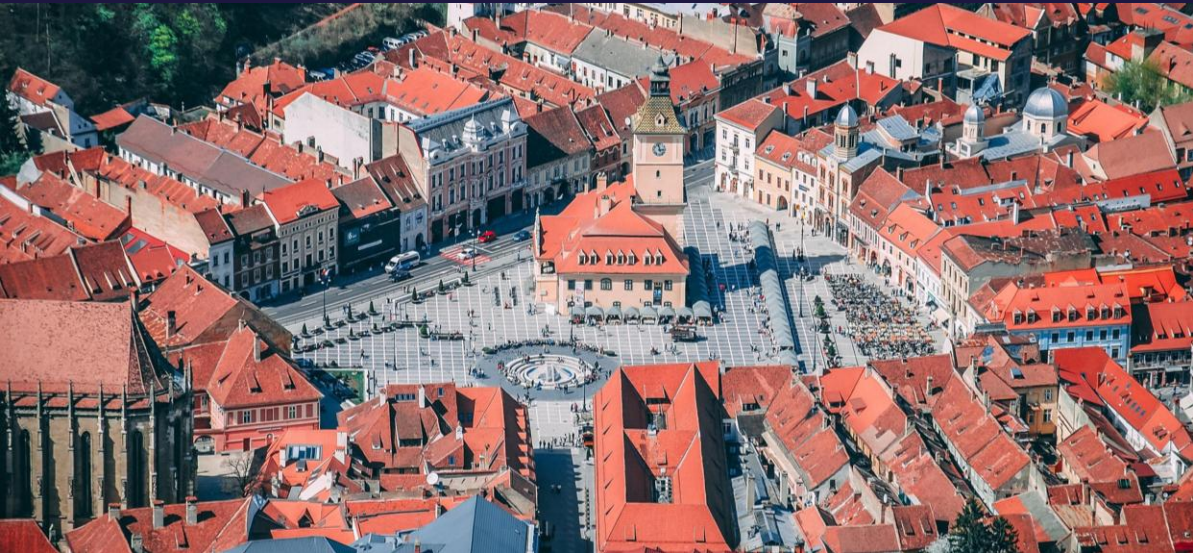
PROJECT	GLA (SQ. M)
N/A	-

STOCK EVOLUTION (SQ. M)



MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
CTP	547,000
WDP	240,000
VGP	223,000



KEY FACTS



2nd after Bucharest-Ilfov
in terms of the total FDI
stock



Major hub for the
manufacturing of
automotive components



Among the top egions
in Romania in terms of
GDP per capita

MACROECONOMIC & DEMOGRAPHIC		MAJOR CITIES	POPULATION
Total Population	2,290,237	Brasov	237,589
Labour Force	686,400	Sibiu	134,308
Students	59,100	Targu Mures	116,033
Unemployed Population	34,500	Alba Iulia	64,227
Unemployment Rate	3.4%	Sfantu Gheorghe	50,080
Average Net Monthly Income (€)	942		
GDP 2025 F (bn. €)	40.4		
GDP/ CAPITA 2025 F (€)	17,800		
GDP Growth (2025 F)	0.6%		
FDI Stock 2023 (bn. €)	9.8		

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

CENTER

BRASOV | SIBIU | ALBA IULIA | TARGU MURES | SFANTU GHEORGHE

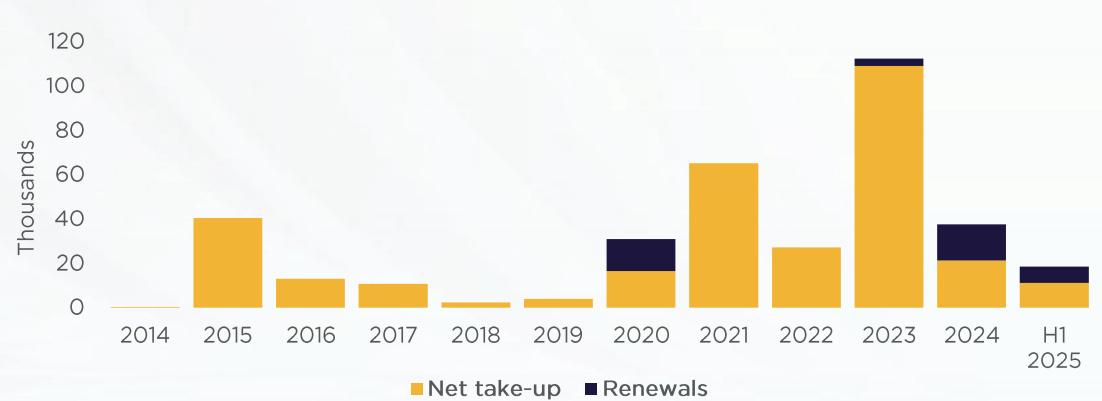
MARKET OVERVIEW

Total stock (sq. m)	726,900
Stock per capita (sq. m)	317
New supply 2024 – H1 2025 (sq. m)	106,400
UC Pipeline (sq. m)	45,000
Take-up 2024 – H1 2025 (sq. m)	61,500
Vacancy rate	2.6%
Prime rental level (€ / sq. m/ month)	4.50

MAJOR INDUSTRIAL SUB-MARKETS

CITY	NEW SUPPLY 2024 – H1 2025 (SQ. M)	STOCK H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Brasov	88,600	480,600	45,000
Sibiu	17,800	178,600	-
Targu Mures	-	41,500	-
Alba Iulia	-	26,200	-
TOTAL	106,400	726,900	45,000

TAKE-UP EVOLUTION (SQ. M)



MAJOR DEALS 2024 – H1 2025

TENANT	GLA (SQ. M)	PROJECT	TYPE
ReTuro	3,300	VGP Park Brasov	New Lease
Scribant	2,900	VGP Park Brasov	New Lease
LKY	2,800	RA-RA Logistic	New Lease
Miele	2,000	VGP Park Brasov	New Lease

Source: Cushman & Wakefield Echinox Research

CENTER

BRASOV | SIBIU | ALBA IULIA | TARGU MURES | SFANTU GHEORGHE

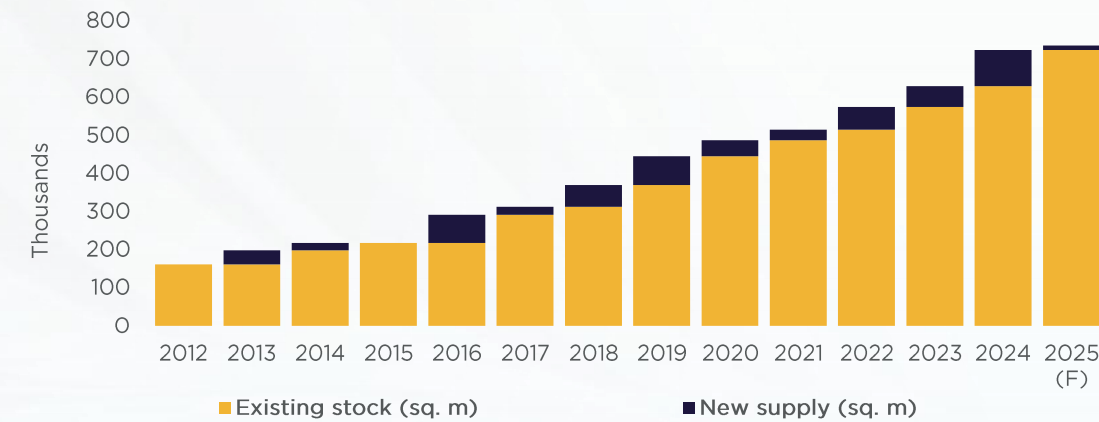
MAJOR PROJECTS

PROJECT	GLA (SQ. M)	OWNER
Industrial Park Brasov	147,000	ICCO
VGP Park Brasov	142,000	VGP
CTPark Brasov	58,000	CTP
CTPark Sibiu West	47,000	CTP
CTPark Sibiu East	42,000	CTP
WDP Park Sibiu	26,000	WDP

MAJOR UNDER CONSTRUCTION PROJECTS

PROJECT	GLA (SQ. M)
VGP Park Brasov	45,000

STOCK EVOLUTION (SQ. M)

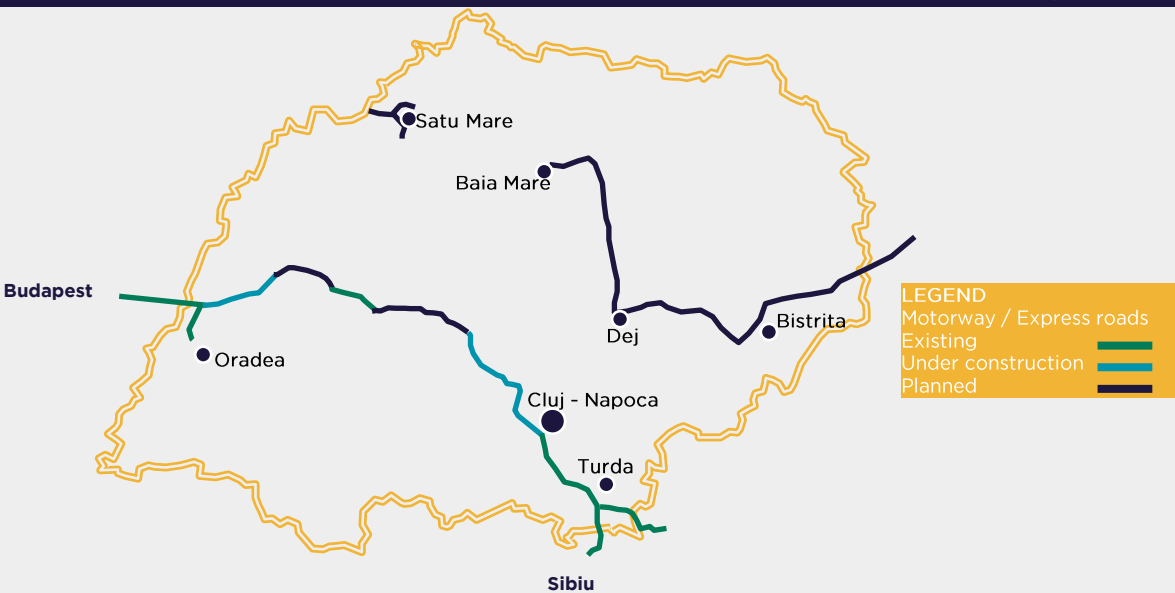
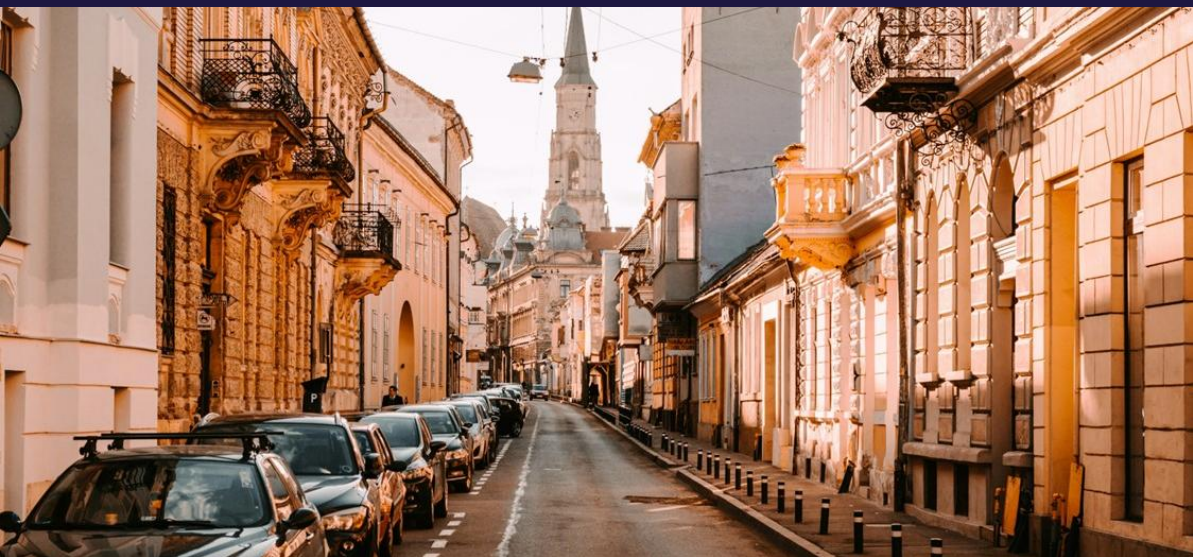


MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
CTP	190,000
VGP	158,000
ICCO	147,000
WDP	77,000

NORTH - WEST

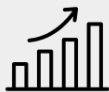
CLUJ NAPOCA | SATU MARE | BAIAMARE | ORADEA | BISTRITA



KEY FACTS



Major manufacturing hub
in Romania



2nd region in terms of
contribution to national
GDP



4 international airports
located in the region

MACROECONOMIC & DEMOGRAPHIC	
Total Population	2,542,793
Labour Force	743,200
Students	94,000
Unemployed Population	31,000
Unemployment Rate	2.8%
Average Net Monthly Income (€)	967
GDP 2025 F (bn. €)	45.3
GDP/ CAPITA 2025 F (€)	18,000
GDP Growth (2025 F)	1.8%
FDI Stock 2023 (bn. €)	7.4

MAJOR CITIES	POPULATION
Cluj - Napoca	286,598
Oradea	183,105
Baia Mare	108,759
Satu Mare	91,520
Bistrita	78,877

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

NORTH - WEST

CLUJ - NAPOCA | SATU MARE | BAIA MARE | ORADEA | BISTRITA

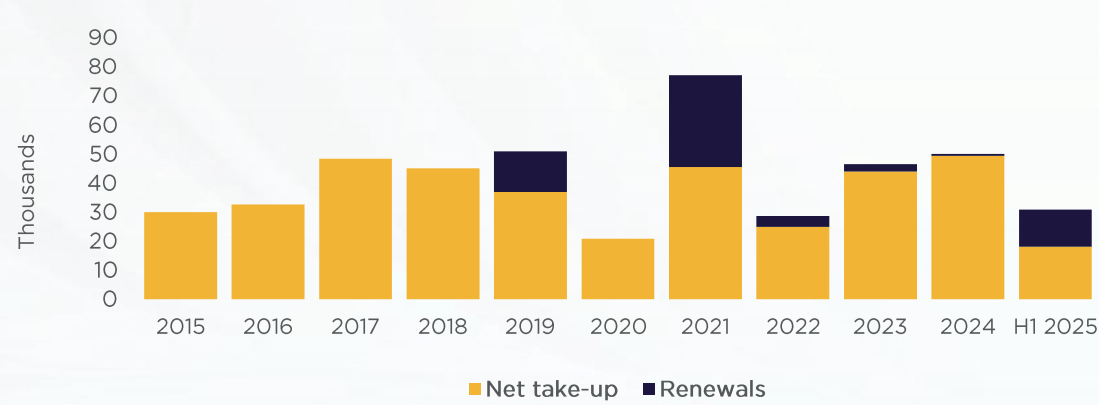
MARKET OVERVIEW

Total stock (sq. m)	679,600
Stock per capita (sq. m)	267
New supply 2024 – H1 2025 (sq. m)	43,000
UC Pipeline (sq. m)	-
Take-up 2024 – H1 2025 (sq. m)	115,700
Vacancy rate	5.3%
Prime rental level (€ / sq. m/ month)	4.65

MAJOR INDUSTRIAL SUB-MARKETS

CITY	NEW SUPPLY 2024 – H1 2025 (SQ. M)	STOCK H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Cluj - Napoca	17,000	447,000	-
Oradea	-	197,600	-
Baia Mare	11,300	20,300	-
Targu Lapus	14,600	14,700	-
TOTAL	43,000	679,600	-

TAKE-UP EVOLUTION (SQ. M)



MAJOR DEALS 2024 – H1 2025

TENANT	GLA (SQ. M)	PROJECT	TYPE
HelpShip	15,000	CTPark Oradea Cargo Terminal	New lease + Expansion
Maravet	11,000	WDP Park Baia Mare	New Lease
RetuRO	6,000	Olympian Park Oradea	Pre - lease

Source: Cushman & Wakefield Echinox Research

NORTH - WEST

CLUJ - NAPOCA | SATU MARE | BAIA MARE | ORADEA | BISTRITA

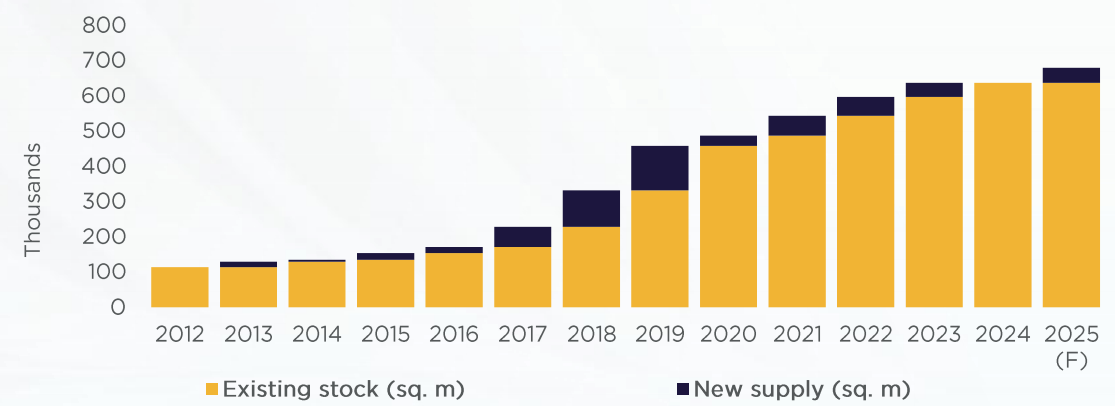
MAJOR PROJECTS

PROJECT	GLA (SQ. M)	OWNER
TRC Park Transilvania	141,000	Transilvania Constructii
WDP Park Apahida (Cluj - Napoca)	114,000	WDP
CTPark Oradea Cargo Terminal	65,000	CTP
WDP Park Oradea	58,000	WDP
SNS Logistics Park	50,000	SNS
Olympian Park Cluj	31,000	Olympian

MAJOR UNDER CONSTRUCTION PROJECTS

PROJECT	GLA (SQ. M)
N/A	-

STOCK EVOLUTION (SQ. M)

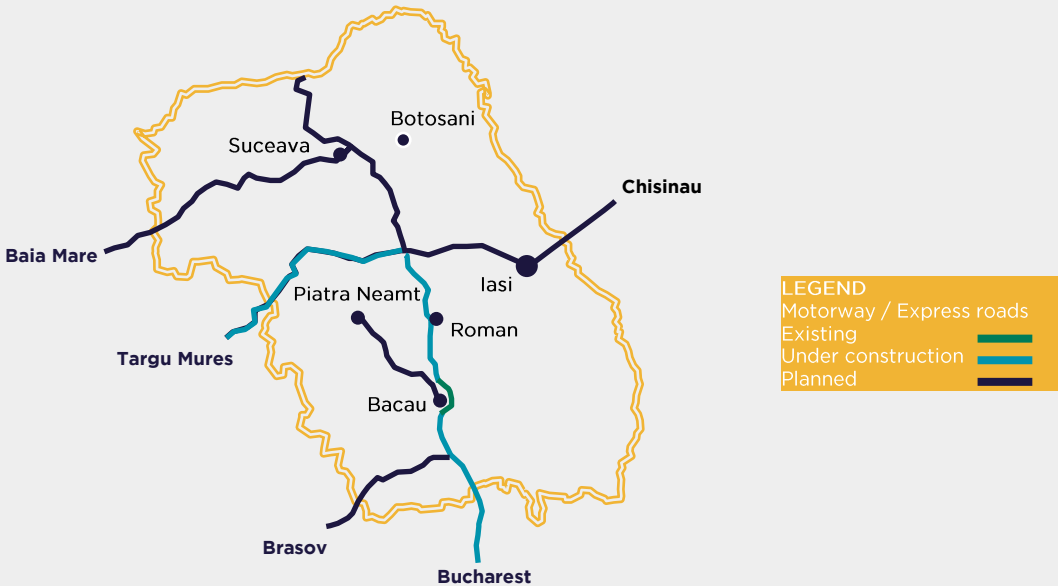


MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
WDP	208,000
CTP	170,000
Transilvania Constructii	141,000

NORTH - EAST

BACAU | BOTOSANI | SUCEAVA | PIATRA NEAMT | IASI



KEY FACTS



Good perspective in terms of infrastructure investments (A7 and A8 highways)



The largest region in Romania in terms of size and population



Undersupply and less intensive competition, emergence of demand for A-class projects

MACROECONOMIC & DEMOGRAPHIC		MAJOR CITIES	POPULATION
Total Population	3,217,989	Iasi	271,692
Labour Force	621,200	Bacau	136,102
Students	71,800	Botosani	89,987
Unemployed Population	50,600	Suceava	84,308
Unemployment Rate	4.9%	Piatra Neamt	79,679
Average Net Monthly Income (€)	898	Vaslui	63,035
GDP 2025 F (bn. €)	38.5	Barlad	52,475
GDP/ CAPITA 2025 F (€)	12,100		
GDP Growth (2025 F)	1.9%		
FDI Stock 2023 (bn. €)	3.0		

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

NORTH - EAST

BACAU | BOTOSANI | SUCEAVA | PIATRA NEAMT | IASI

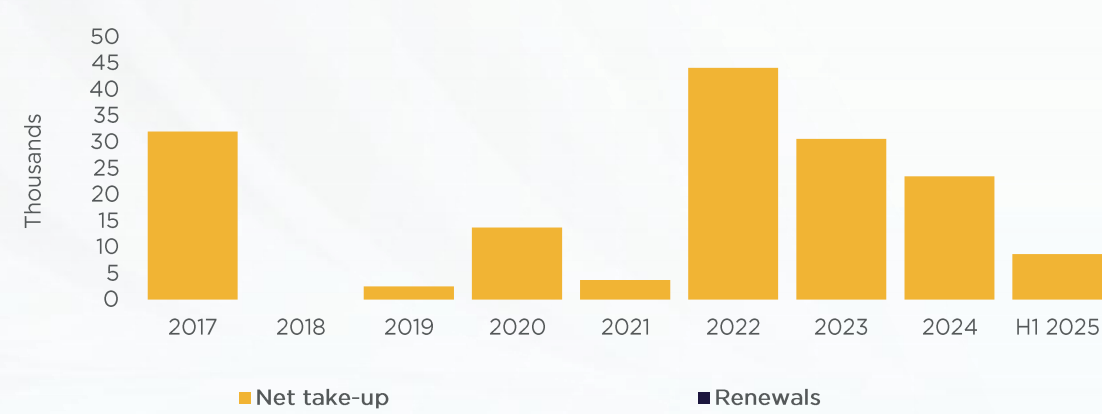
MARKET OVERVIEW

Total stock (sq. m)	215,900
Stock per capita (sq. m)	67
New supply 2024 – H1 2025 (sq. m)	50,200
UC Pipeline (sq. m)	20,000
Take-up 2024 – H1 2025 (sq. m)	32,100
Vacancy rate	18.8%
Prime rental level (€ / sq. m/ month)	4.20

MAJOR INDUSTRIAL SUB-MARKETS

CITY	NEW SUPPLY 2024 – H1 2025 (SQ. M)	STOCK H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Bacau	8,200	64,700	-
Roman	-	56,400	-
Iasi	42,000	94,800	20,000
TOTAL	50,200	215,900	20,000

TAKE-UP EVOLUTION (SQ. M)



MAJOR DEALS 2024 – H1 2025

TENANT	GLA (SQ. M)	PROJECT	TYPE
Fan Courier	4,800	ELI Park Bacau	New lease
Sonoma Sportswear	4,300	TRC Park Bacau	New lease
Alliance Healthcare	4,000	ELI Park Iasi	New lease

Source: Cushman & Wakefield Echinox Research

NORTH - EAST

BACAU | BOTOSANI | SUCEAVA | PIATRA NEAMT | IASI

MAJOR PROJECTS

PROJECT	GLA (SQ. M)	OWNER
WDP Park Roman	56,000	WDP
ELI Park Bacau	45,000	ELI Parks
Solo Park Iasi	35,000	Oresa Industra

MAJOR UNDER CONSTRUCTION PROJECTS

PROJECT	GLA (SQ. M)
ProInvest Park (acquired by WDP)	20,000

STOCK EVOLUTION (SQ. M)

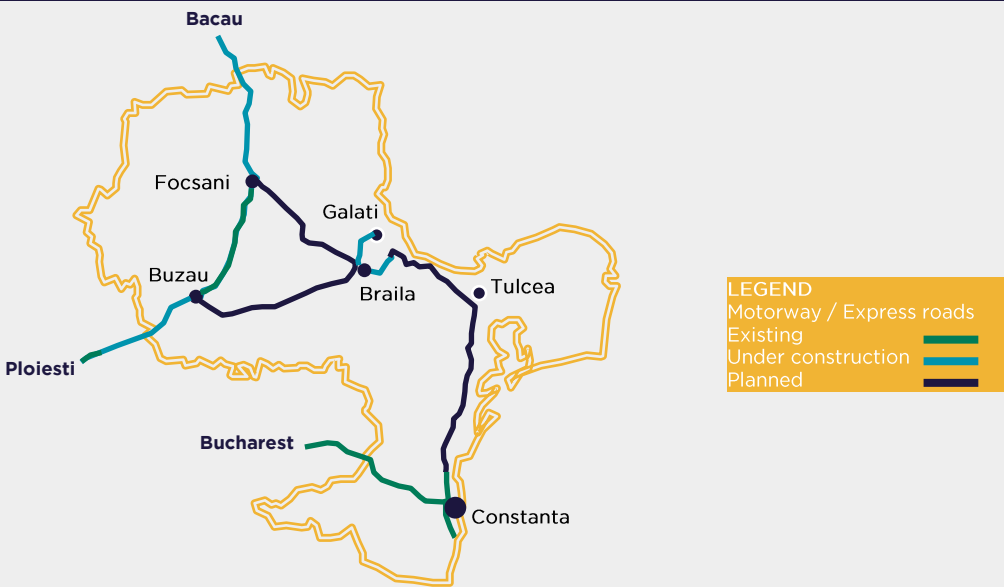


MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
WDP	76,000
ELI Parks	67,000
Oresa Industra	35,000

SOUTH - EAST

BRAILA | BUZAU | CONSTANTA | GALATI | TULCEA | FOCSANI



KEY FACTS



Maritime hub
(5 shipyards, Constanta
being the largest
container port at the
Black Sea)



Important European
transport corridors
connecting the Region
with Bucharest



The 2nd largest region
of Romania in terms of
size

MACROECONOMIC & DEMOGRAPHIC		MAJOR CITIES	POPULATION
Total Population	2,330,166	Constanta	263,707
Labour Force	574,000	Galati	217,851
Students	39,300	Braila	154,686
Unemployed Population	33,100	Buzau	103,481
Unemployment Rate	3.8%	Focsani	66,719
Average Net Monthly Income (€)	851	Tulcea	65,624
GDP 2025 F (bn. €)	36.0		
GDP/ CAPITA 2025 F (€)	15,600		
GDP Growth (2025 F)	1.7%		
FDI Stock 2023 (bn. €)	4.3		

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

SOUTH - EAST

BRAILA | BUZAU, CONSTANTA | GALATI | TULCEA | FOCSANI

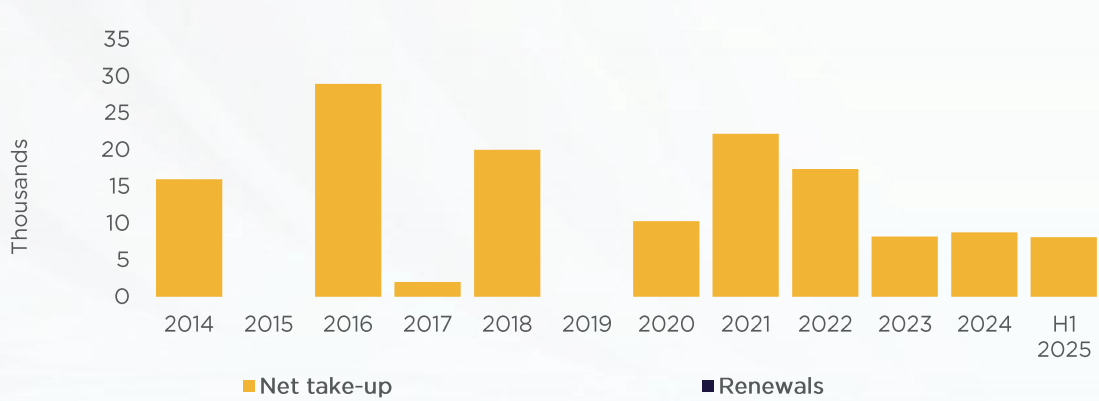
MARKET OVERVIEW

Total stock (sq. m)	124,100
Stock per capita (sq. m)	53
New supply 2024 – H1 2025 (sq. m)	5,200
UC Pipeline (sq. m)	-
Take-up 2024 – H1 2025 (sq. m)	16,900
Vacancy rate	0.0%
Prime rental level (€ / sq. m/ month)	4.20

MAJOR INDUSTRIAL SUB-MARKETS

CITY	NEW SUPPLY 2024 – H1 2025 (SQ. M)	STOCK H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Constanta	-	53,900	-
Braila	-	44,000	-
Buzau	5,200	26,200	-
TOTAL	5,200	124,100	-

TAKE-UP EVOLUTION (SQ. M)



MAJOR DEALS 2024 – H1 2025

TENANT	GLA (SQ. M)	PROJECT	TYPE
Fan Courier	7,000	Buzau Industrial Parc	New lease
Sameday	5,600	Olympian Parks Constanta	Pre - lease

Source: Cushman & Wakefield Echinox Research

SOUTH - EAST

BRAILA | BUZAU | CONSTANTA | GALATI | TULCEA | FOCSANI

MAJOR PROJECTS

PROJECT	GLA (SQ. M)	OWNER
WDP Park Braila	44,000	WDP
WDP Park Constanta	39,000	WDP
WDP Park Buzau	26,000	WDP

MAJOR UNDER CONSTRUCTION PROJECTS

PROJECT	GLA (SQ. M)
-	-

STOCK EVOLUTION (SQ. M)



MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
WDP	113,000

SOUTH - MUNTENIA

PLOIESTI | PITESTI | TARGOVISTE | SLOBOZIA | GIURGIU | CALARASI



KEY FACTS



Directly connected to Bucharest via the A1, A2 and A3 highways



One of the most dynamic regions in terms of GDP growth in 2024 (3.5%), mainly driven by services



Major industrial hub for Oil & Gas company, automotive, FMCG, white goods, etc.



MACROECONOMIC & DEMOGRAPHIC	
Total Population	2,824,068
Labour Force	608,300
Students	19,300
Unemployed Population	42,800
Unemployment Rate	4.3%
Average Net Monthly Income (€)	894
GDP 2025 F (bn. €)	43.3
GDP/ CAPITA 2025 F (€)	15,600
GDP Growth (2025 F)	1.2%
FDI Stock 2023 (bn. €)	7.4

MAJOR CITIES	POPULATION
Ploiesti	180,539
Pitesti	141,275
Targoviste	66,965
Calarasi	58,215
Giurgiu	54,551
Slobozia	41,553
Alexandria	40,390

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

SOUTH - MUNTENIA

PLOIESTI | PITESTI | TARGOVISTE | SLOBOZIA | GIURGIU | CALARASI

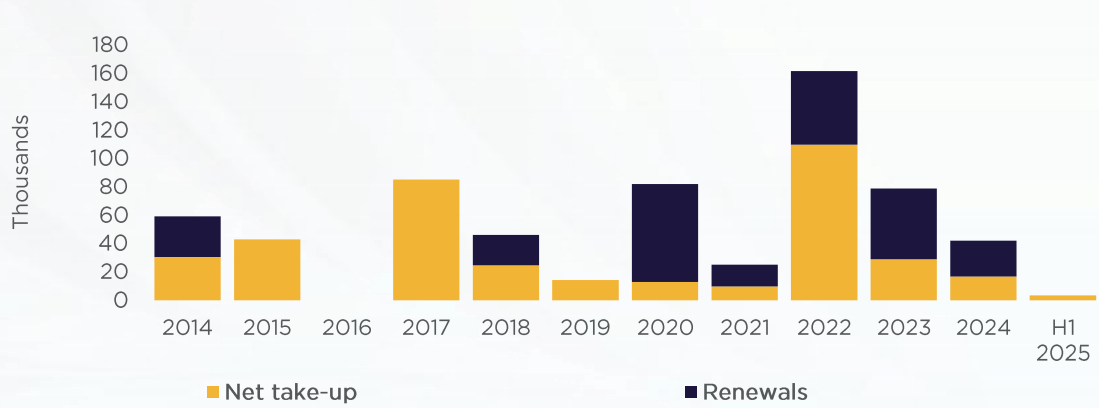
MARKET OVERVIEW

Total stock (sq. m)	882,800
Stock per capita (sq. m)	313
New supply 2024 – H1 2025 (sq. m)	157,200
UC Pipeline (sq. m)	-
Take-up 2024 – H1 2025 (sq. m)	45,600
Vacancy rate	0.5%
Prime rental level (€ / sq. m/ month)	4.30

MAJOR INDUSTRIAL SUB-MARKETS

CITY	NEW SUPPLY 2024 – H1 2025 (SQ. M)	STOCK H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Ploiesti	157,200	574,400	-
Pitesti	-	308,400	-
TOTAL	157,200	882,800	-

TAKE-UP EVOLUTION (SQ. M)



MAJOR DEALS 2024 – H1 2025

TENANT	GLA (SQ. M)	PROJECT	TYPE
Tenneco	19,000	WDP Park Ploiesti	Sale & leaseback
LPR	3,500	ELI Park Ploiesti	New Lease
DAAS	3,500	ELI Park Ploiesti	New Lease

Source: Cushman & Wakefield Echinox Research

SOUTH - MUNTENIA

PLOIESTI | PITESTI | TARGOVISTE | SLOBOZIA | GIURGIU | CALARASI

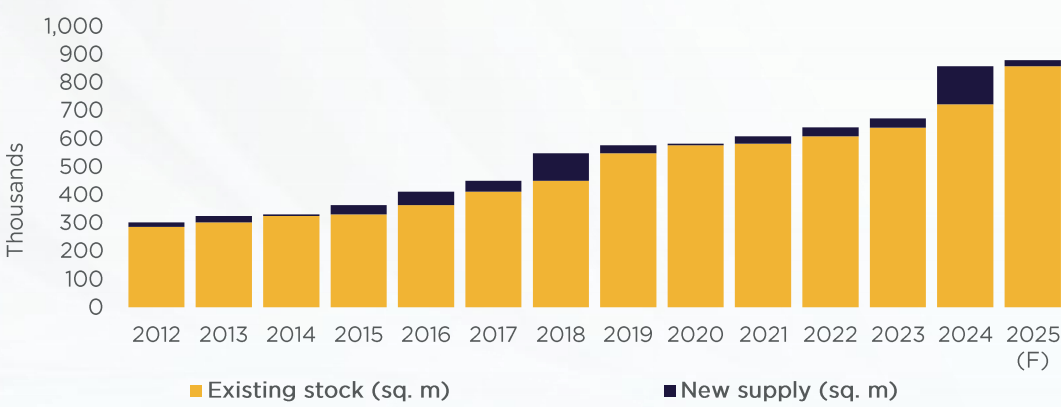
MAJOR PROJECTS

PROJECT	GLA (SQ. M)	OWNER
Ploiesti West Park	248,000	Alinso
WDP Park Ploiesti	85,000	WDP
WDP Park Pitesti	83,000	WDP
CTPark Pitesti	77,000	CTP
CTPark Pitesti Oarja	68,000	CTP
LogCenter Ploiesti	51,000	Logicor

MAJOR UNDER CONSTRUCTION PROJECTS

PROJECT	GLA (SQ. M)
N/A	-

STOCK EVOLUTION (SQ. M)

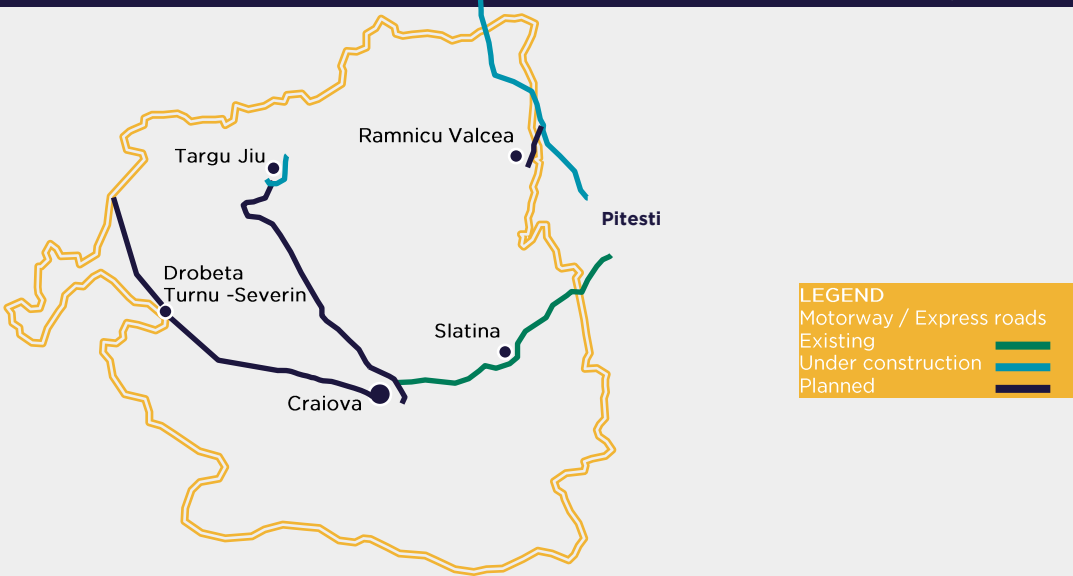


MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
CTP	267,000
Alinso	248,000
WDP	218,000

SOUTH - WEST OLTENIA

CRAIOVA | SLATINA | TARGU JIU | DROBETA - TURNU SEVERIN | RAMNICU VALCEA



KEY FACTS



Good workforce availability, having one of the highest unemployment rates in the country



Major hub for the energy industry, car manufacturing or automotive components



3 universities, with almost 30,000 students enrolled

MACROECONOMIC & DEMOGRAPHIC	
Total Population	1,846,904
Labour Force	421,800
Students	29,800
Unemployed Population	42,900
Unemployment Rate	6.1%
Average Net Monthly Income (€)	872
GDP 2025 F (bn. €)	29.0
GDP/ CAPITA 2025 F (€)	15,900
GDP Growth (2025 F)	2.6%
FDI Stock 2023 (bn. €)	2.3

MAJOR CITIES	POPULATION
Craiova	234,140
Ramnicu Valcea	93,151
Drobeta – Turnu Severin	79,865
Targu Jiu	73,544
Slatina	63,487

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

SOUTH – WEST OLTENIA

CRAIOVA | SLATINA | TARGU JIU | DROBETA - TURNU SEVERIN | RAMNICU VALCEA

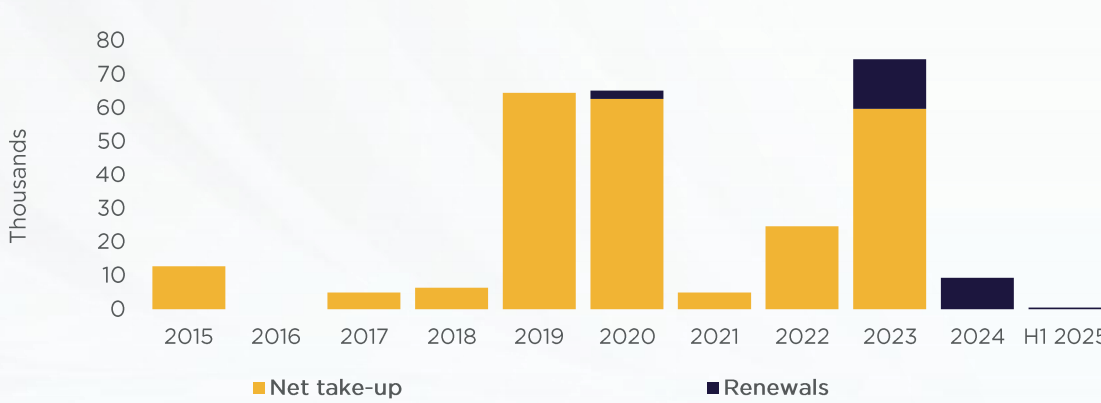
MARKET OVERVIEW

Total stock (sq. m)	280,400
Stock per capita (sq. m)	152
New supply 2024 – H1 2025 (sq. m)	54,500
UC Pipeline (sq. m)	6,000
Take-up 2024 – H1 2025 (sq. m)	11,200
Vacancy rate	2.4%
Prime rental level (€ / sq. m/ month)	4.20

MAJOR INDUSTRIAL SUB-MARKETS

CITY	NEW SUPPLY 2024 – H1 2025 (SQ. M)	STOCK H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Craiova	6,200	117,900	6,000
Slatina	48,300	137,100	-
Ramnicu Valcea	-	25,400	-
TOTAL	54,500	280,400	6,000

TAKE-UP EVOLUTION (SQ. M)



MAJOR DEALS 2024 – H1 2025

TENANT	GLA (SQ. M)	PROJECT	TYPE
Yazaki	9,300	Caracal Property*	Renewal/ Renegotiation

*Lower grade building, not included in the Industrial & Logistics stock

Source: Cushman & Wakefield Echinox Research

SOUTH – WEST OLTENIA

CRAIOVA | SLATINA | TARGU JIU | DROBETA - TURNU SEVERIN | RAMNICU VALCEA

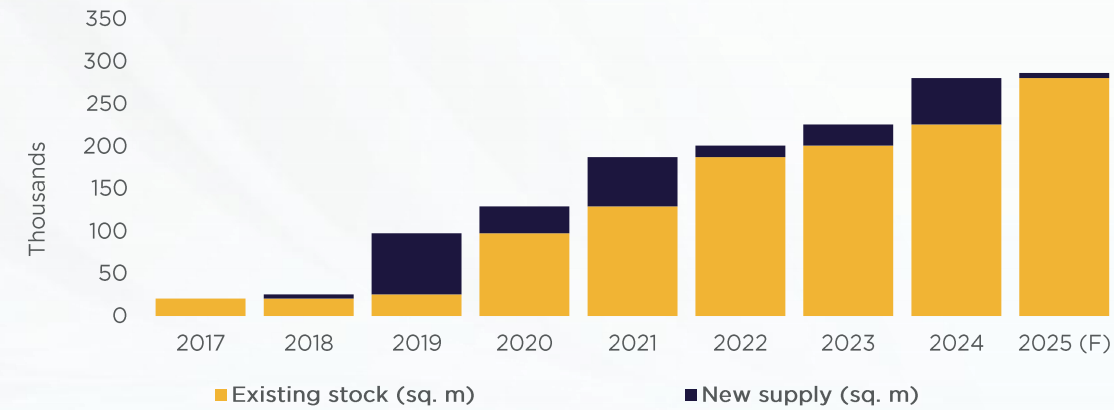
MAJOR PROJECTS

PROJECT	GLA (SQ. M)	OWNER
WDP Park Slatina	137,000	WDP
WDP Park Craiova	58,000	WDP
CTPark Craiova	54,000	CTP
WDP Park Ramnicu Valcea	25,000	WDP

MAJOR UNDER CONSTRUCTION PROJECTS

PROJECT	GLA (SQ. M)
Craiova Business Park	6,000

STOCK EVOLUTION (SQ. M)



MAJOR PLAYERS

DEVELOPER	PORTFOLIO (SQ. M)
WDP	227,000
CTP	54,000

INDUSTRIAL & LOGISTICS MARKET

STATISTICS

REGION	POPULATION	STOCK H1 2024 (SQ. M)	NEW SUPPLY 2024 - H1 2025 (SQ. M)	TAKE-UP 2024 - H1 2025 (SQ. M)	UC PIPELINE (SQ. M)
Bucharest - Ilfov	2,313,519	3,674,600	205,600	848,300	367,100
West	1,670,355	1,168,400	142,000	225,900	-
Center	2,290,237	726,900	106,400	61,500	45,000
North - West	2,542,793	679,600	43,000	115,700	-
North - East	3,217,989	215,900	50,200	32,100	20,000
South - East	2,330,166	124,100	5,200	16,900	-
South - Muntenia	2,824,068	882,800	157,200	45,600	-
South - West Oltenia	1,846,904	280,400	54,500	11,200	6,000
TOTAL	19,036,031	7,752,700	764,100	1,357,300	438,100

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ABOUT CUSHMAN & WAKEFIELD ECHINOX

Cushman & Wakefield Echinox is a leading real estate company on the local market and the exclusive affiliate of Cushman & Wakefield in Romania, owned and operated independently, with a team of over 80 professionals and collaborators offering a full range of services to investors, developers, owners and tenants.

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Better never settles