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20 YEARS OF REAL ESTATE EXCELLENCE

Q3 2025

Market in Minutes

CROSSPOINT RESEARCH

INVESTMENT

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TOTAL INVESTMENT VOLUME, 9M 2025

€441.3 M

▼ **32%** *y-o-y*

CROSS-BORDER INVESTMENTS

€297 M

▼ **44%** *y-o-y*

AVERAGE DEAL SIZE

€18.4 M

INVESTMENT IN THE **CAPITAL CITY**

€238.9 M

Prime Yields		
Office	7.5%	
Industrial & Retail	7.5% - 7.75%	

INVESTMENT

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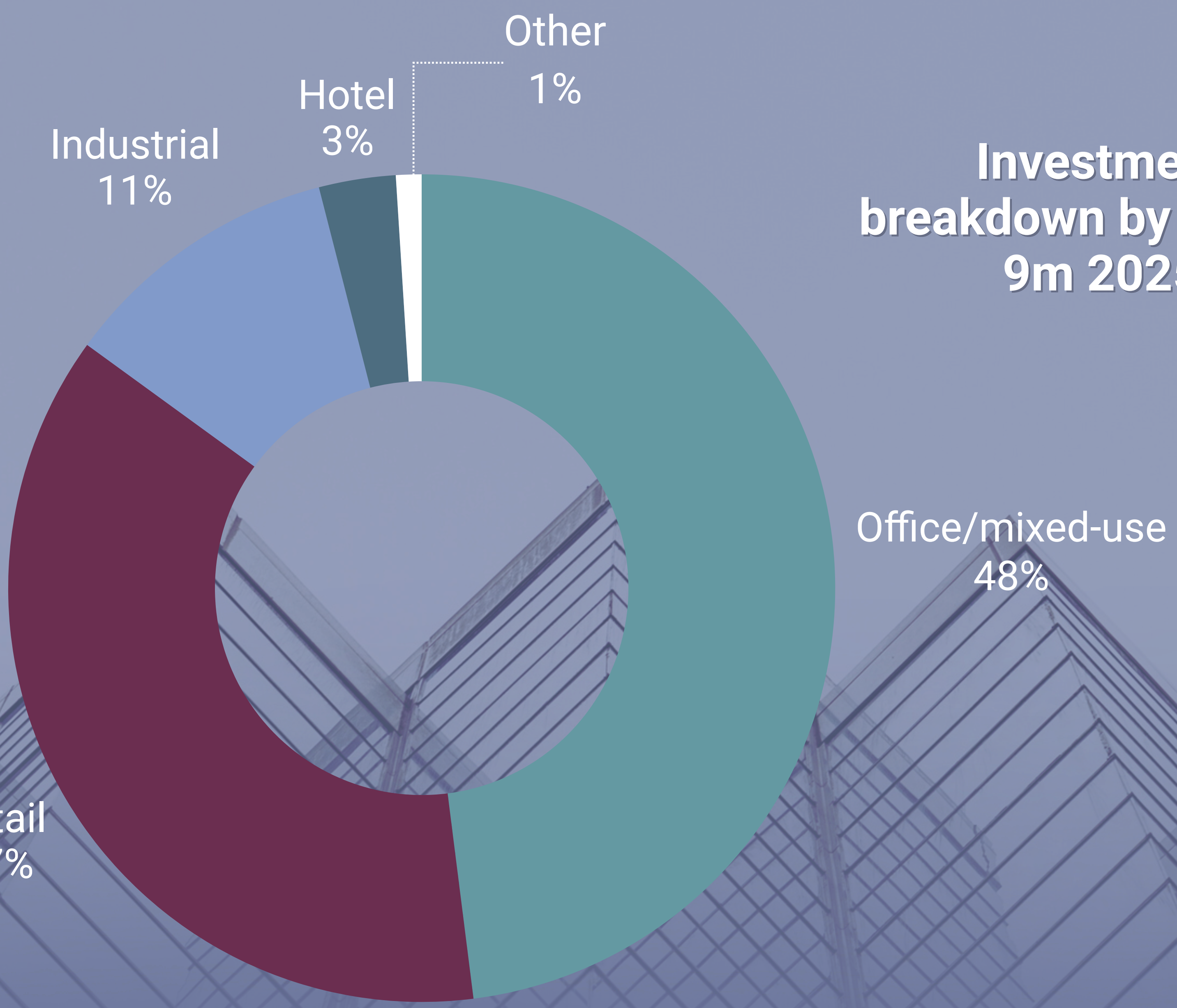
Investment breakdown by sector, 9m 2025



Source: Crosspoint research based on market information

OFFICE

GROSS TAKE-UP, 9M 2025

163,658 SQM

▼ **28%** *y-o-y*

NET TAKE-UP, 9M 2025

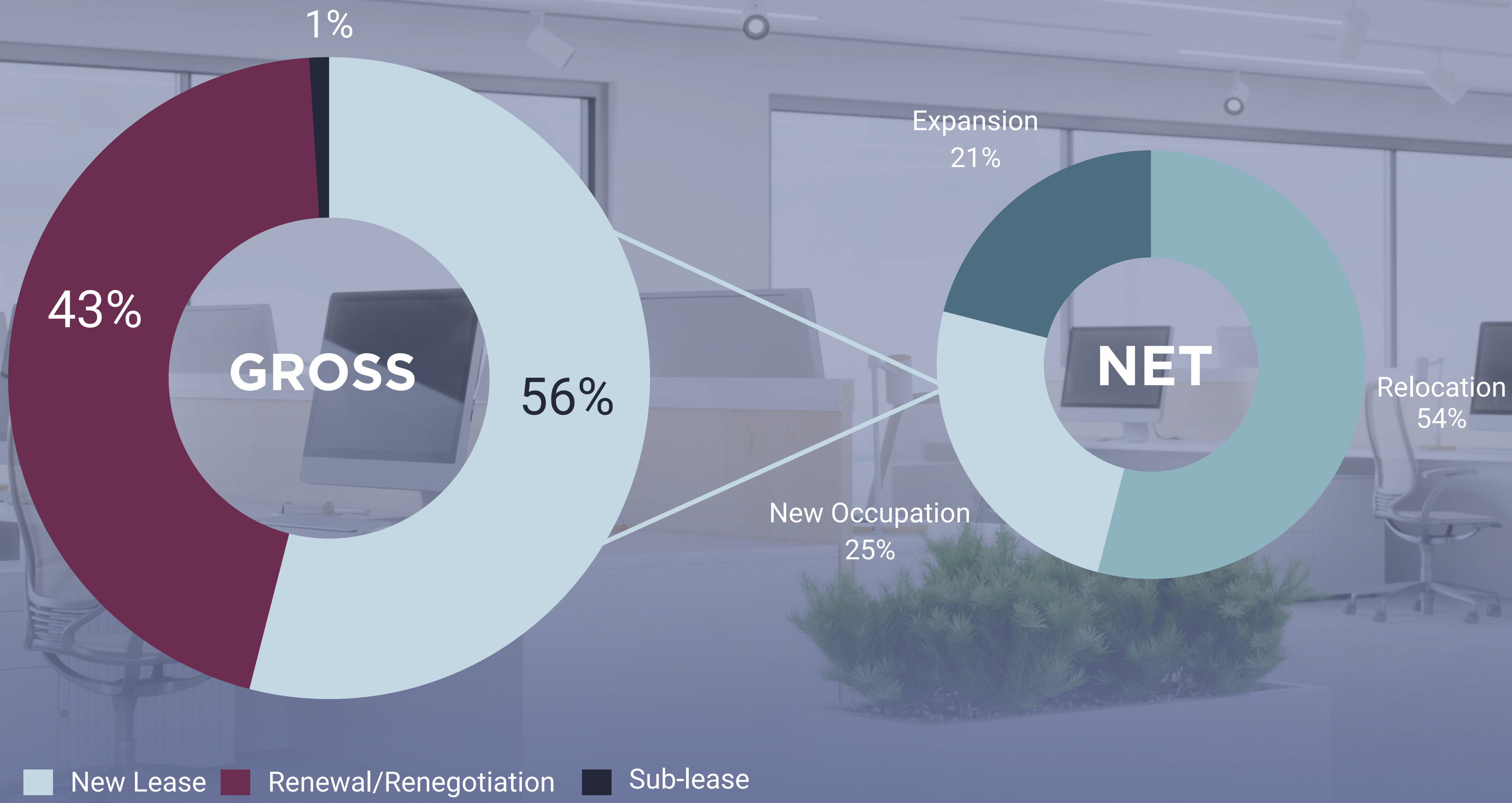
88,704 SQM

▼ **22%** *y-o-y*

TOTAL STOCK	**PRIME** RENT	**VACANCY** RATE
3.4M SQM	**22€**/SQM	**11.1%**

OFFICE

Take-up breakdown,
9m 2025



Source: Crosspoint research based on market information

INDUSTRIAL

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GROSS TAKE-UP, 9M 2025

628,076 SQM

▲ **51 %** *y-o-y*

DEVELOPMENT COMPLETION, Q3 2025

58,339 SQM

NET TAKE-UP, 9M 2025

407,744 SQM

▲ **30 %** *y-o-y*

TOTAL STOCK

7.6M SQM

VACANCY RATE

6%

PRIME RENT

4.75€/SQM

INDUSTRIAL

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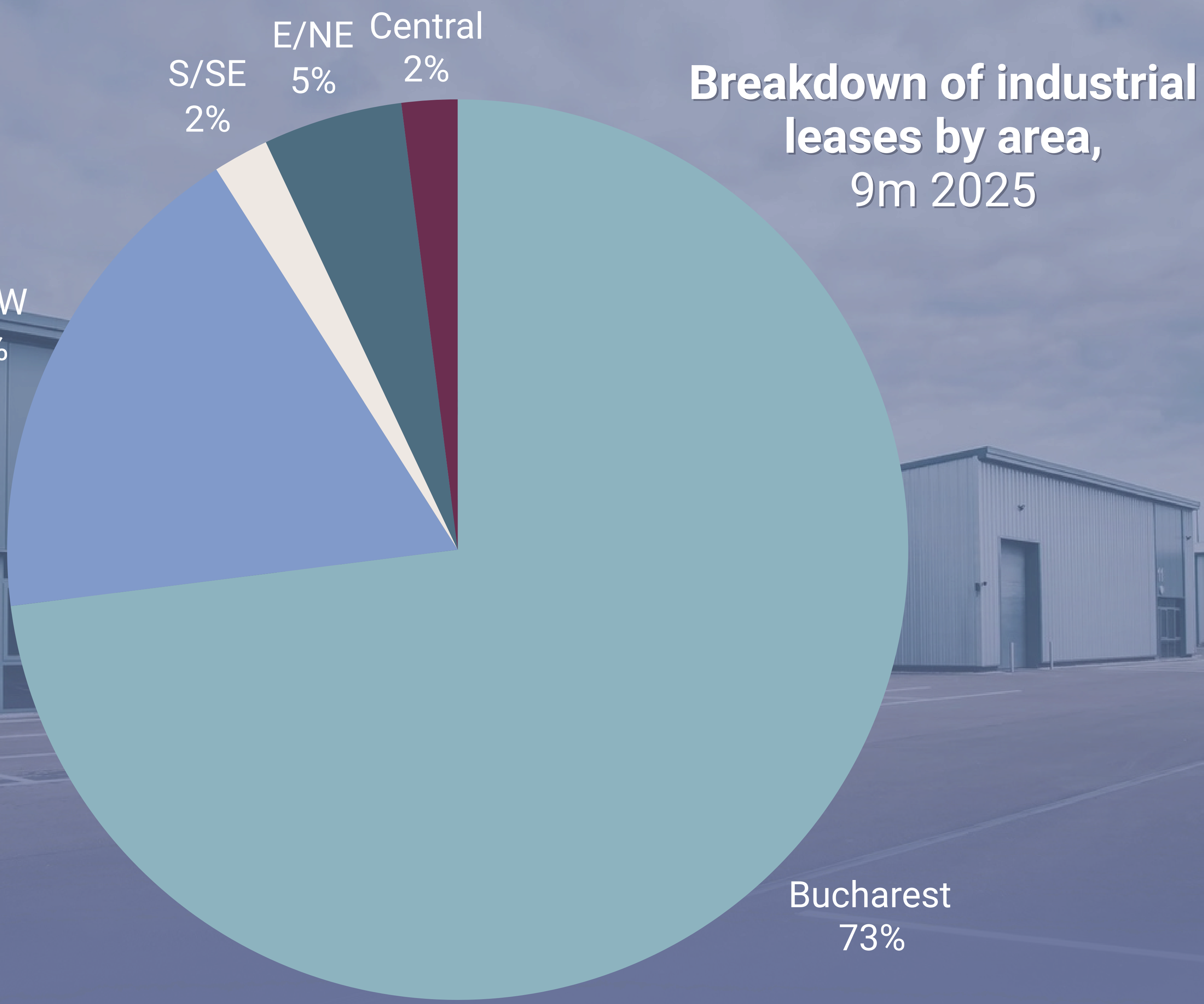

Source: Crosspoint research based on market information

RESIDENTIAL

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APARTMENT TRANSACTIONS

34,781

Bucharest, 9m 2025

▼ **6.6 %** *y-o-y*

BUILDING PERMITS

2,955

Bucharest & Ilfov, 9m 2025

▲ **5.8 %** *y-o-y*

APARTMENT TRANSACTIONS

6,776

Ilfov, 9m 2025

▼ **2.5 %** *y-o-y*

NEW DWELLINGS

7,011

Bucharest & Ilfov, H1 2025

▼ **3 %** *y-o-y*

AVERAGE PRICE/SQM

€2,300

New units, September 2025

RESIDENTIAL

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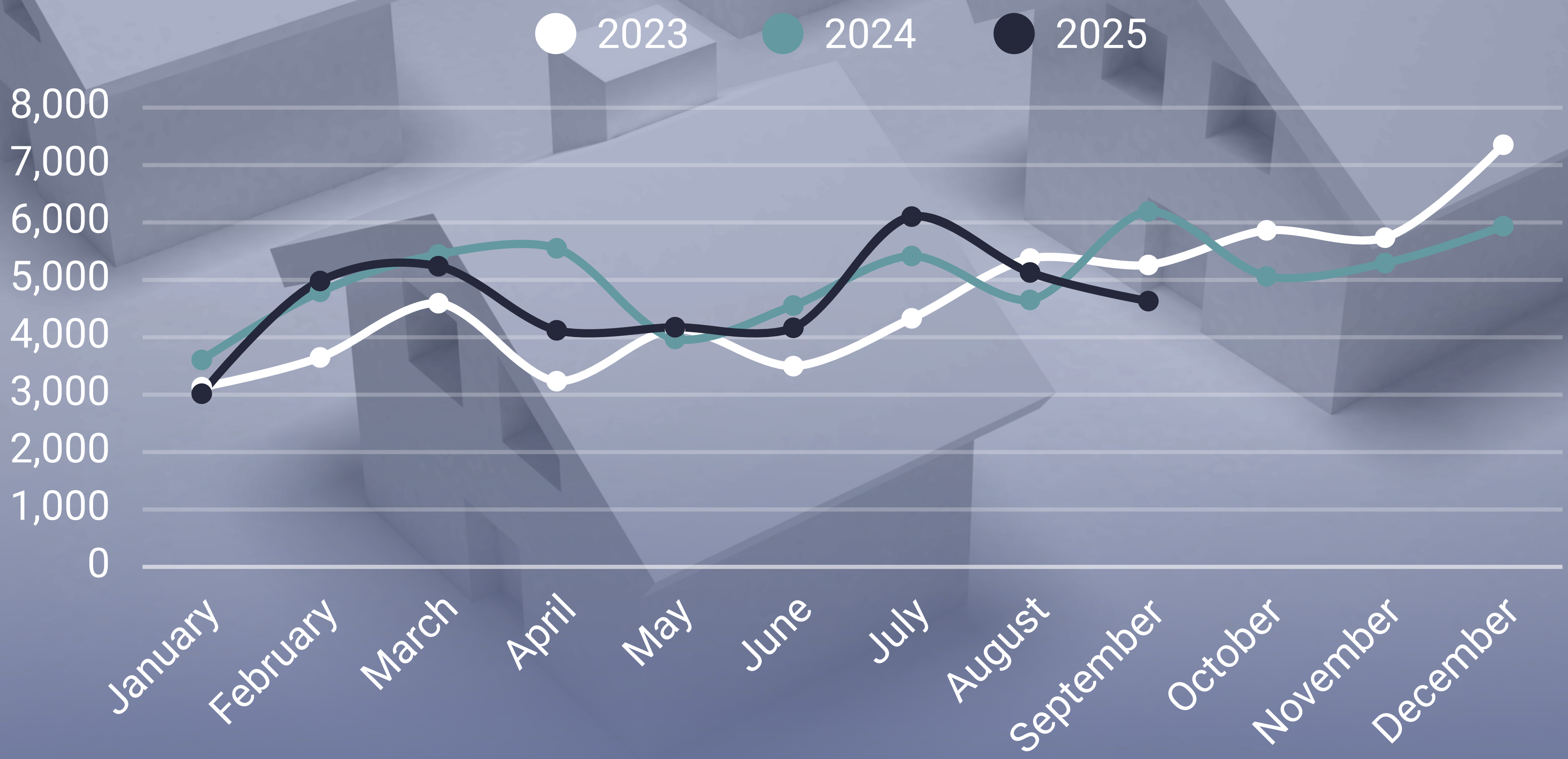
Apartment transactions Bucharest & Ilfov, 2023-9m 2025



Source: ANCPI

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CROSSPOINT RESEARCH

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