



2025

Market in Minutes

CROSSPOINT RESEARCH

INVESTMENT MARKET



179.75 M€

Total investment volume, Q1 2025

▼ 10% y-o-y

Office Yield 7.5%

Industrial Yield 7.5%

Retail Yield 7.5%

165.35 M€

Total cross-border investment

25.7 M€

Average deal size

36.35 M€

Investment in the capital city

20% in total investment volume

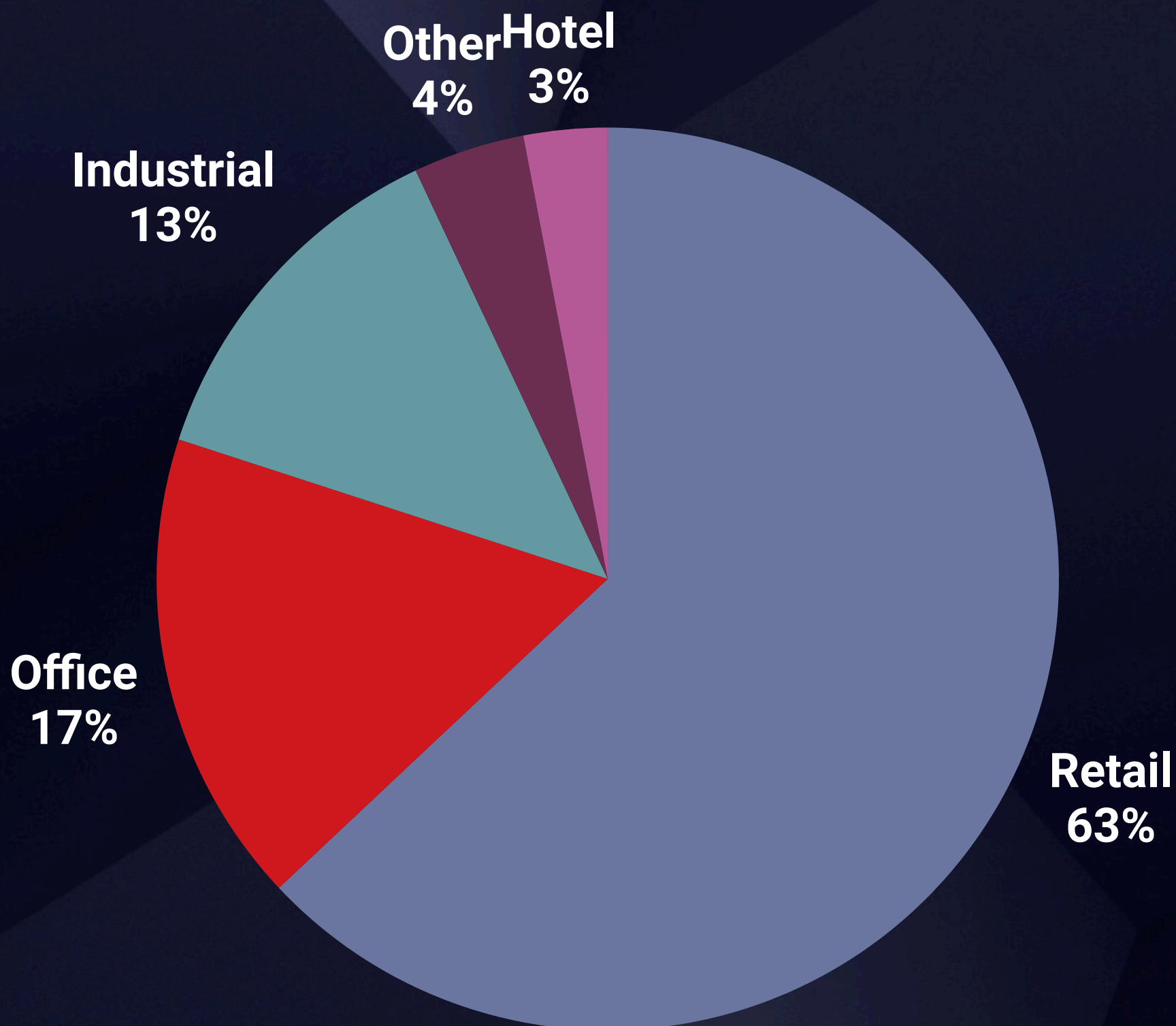
60 M€

Largest transaction

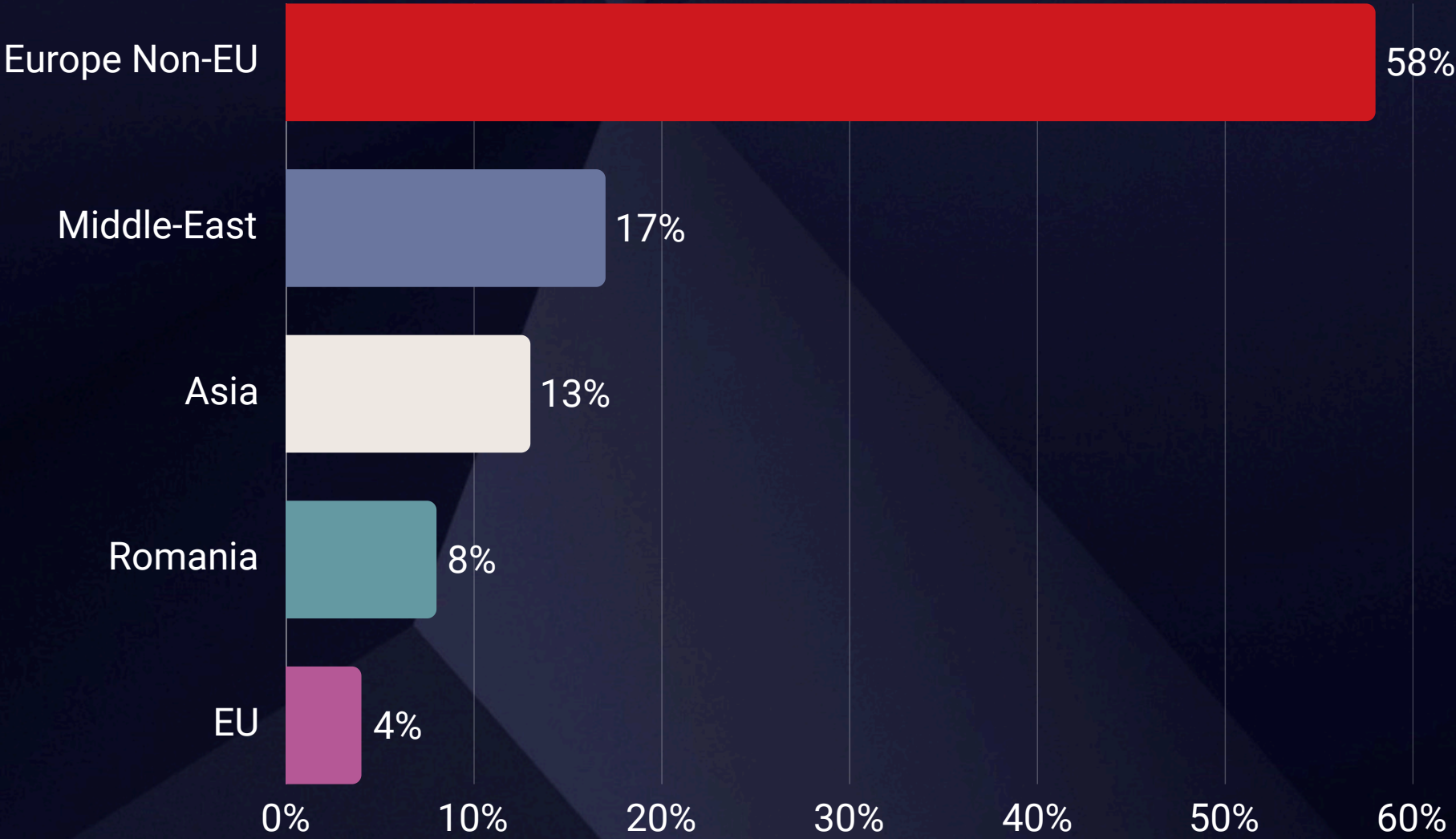


INVESTMENT MARKET

Investment by market sector, Q1 2025



Investment breakdown
by purchaser source of capital, Q1 2025



OFFICE MARKET



Gross take-up

45,678 SQM

▼ **45%** y-o-y

Net take-up

29,608 SQM

▼ **4%** y-o-y

Total stock

3.4M SQM*

Prime rent

22€/SQM

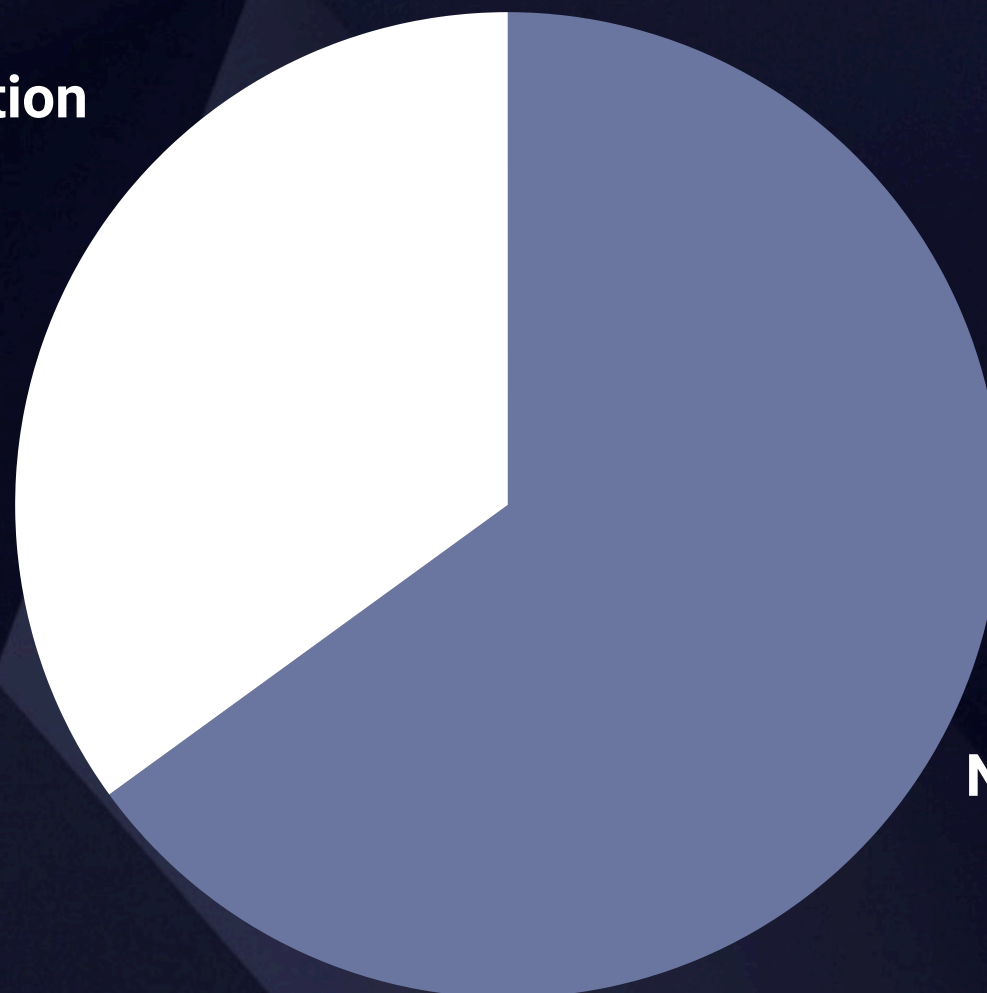
Vacancy rate

11.6%*

**As of 2025, the calculation of Bucharest's office stock has been revised to exclude buildings completed prior to 2005 and those with a leasable area below 2,000 sqm. Accordingly, the vacancy rate variation relative to the 2024 report reflects the redefined stock.*

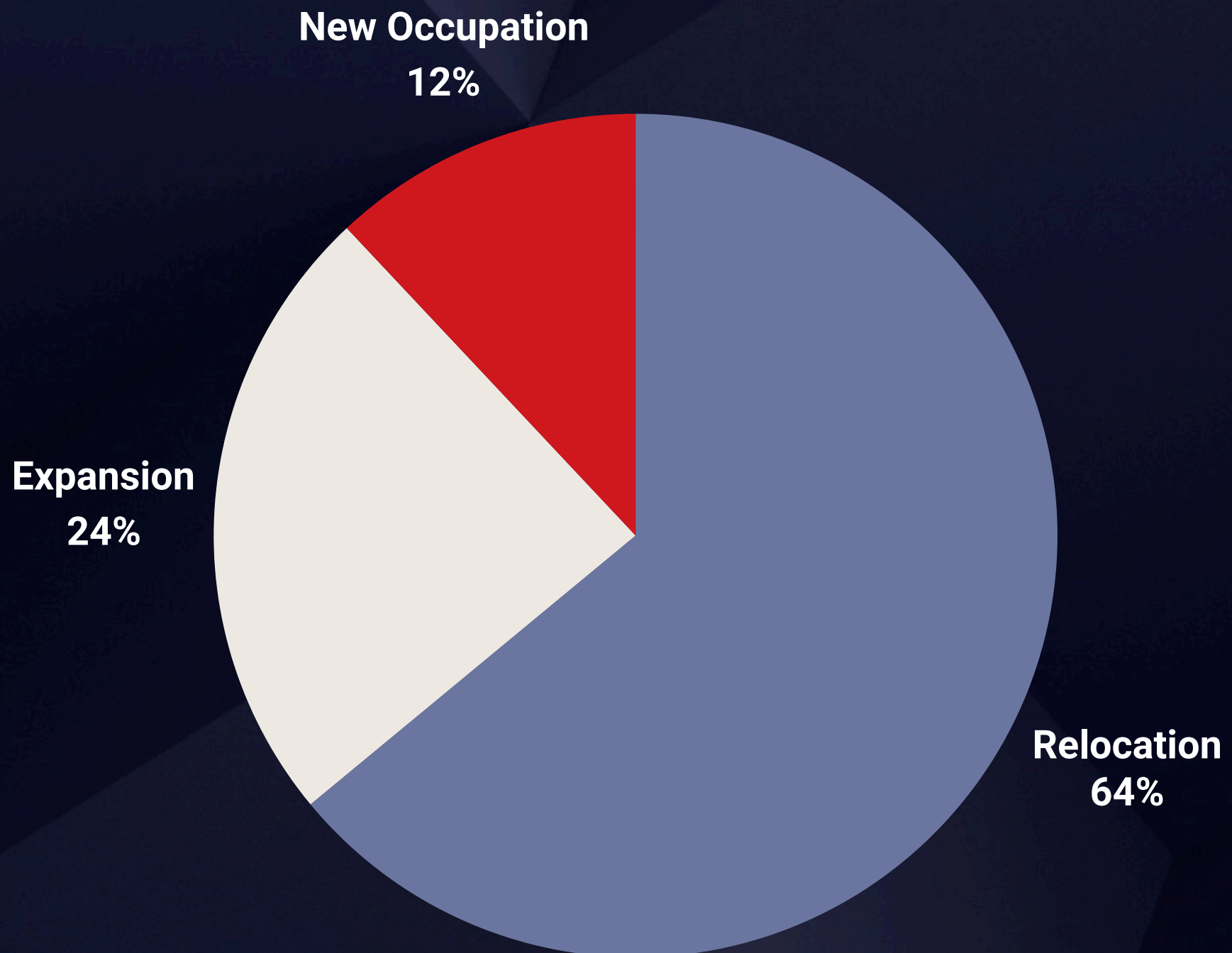
Gross take-up breakdown, Q1 2025

Renewal/Renegotiation
35%



New lease
65%

Net take-up, Q1 2025



INDUSTRIAL MARKET



Gross take-up

134,190 SQM

▼ 6 % y-o-y

Net take-up

109,043 SQM

▼ 3 % y-o-y

Total stock

7.5M SQM

Vacancy rate

5%

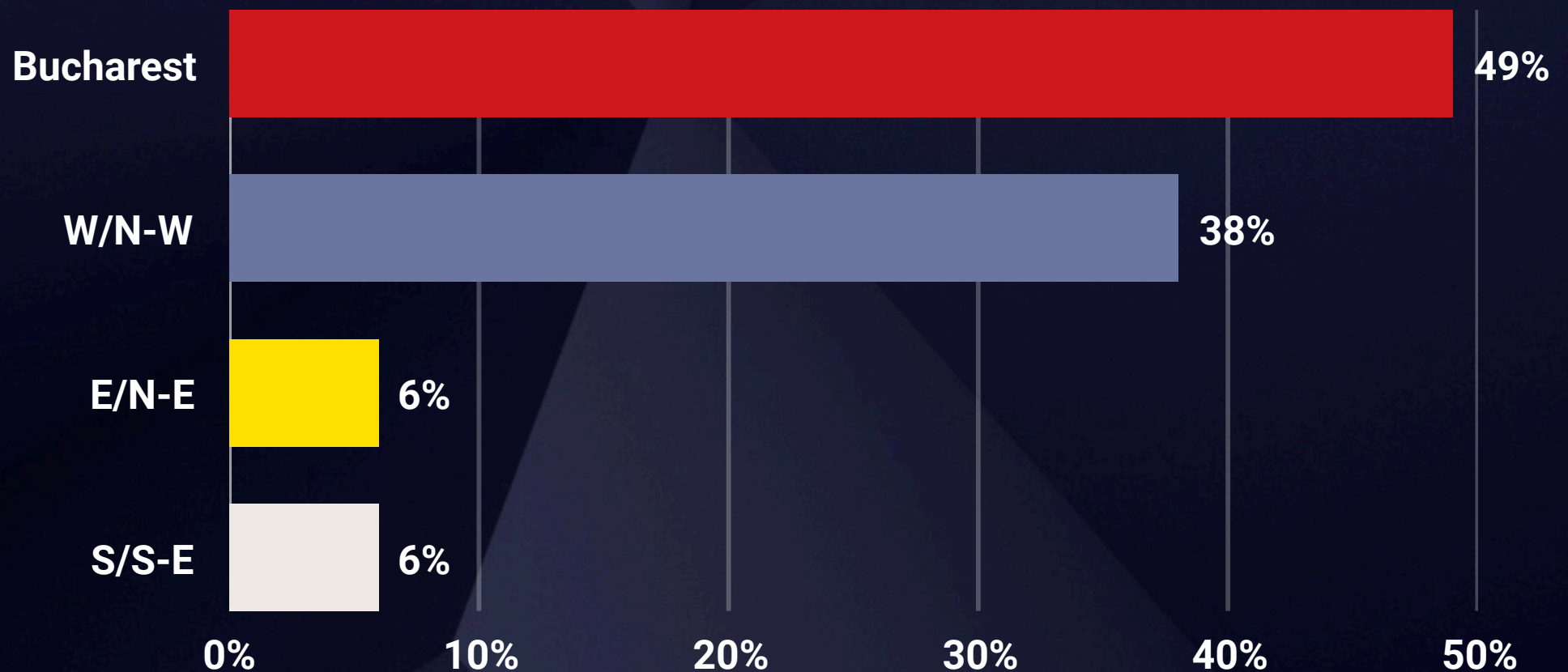
Development completion

136,563 SQM

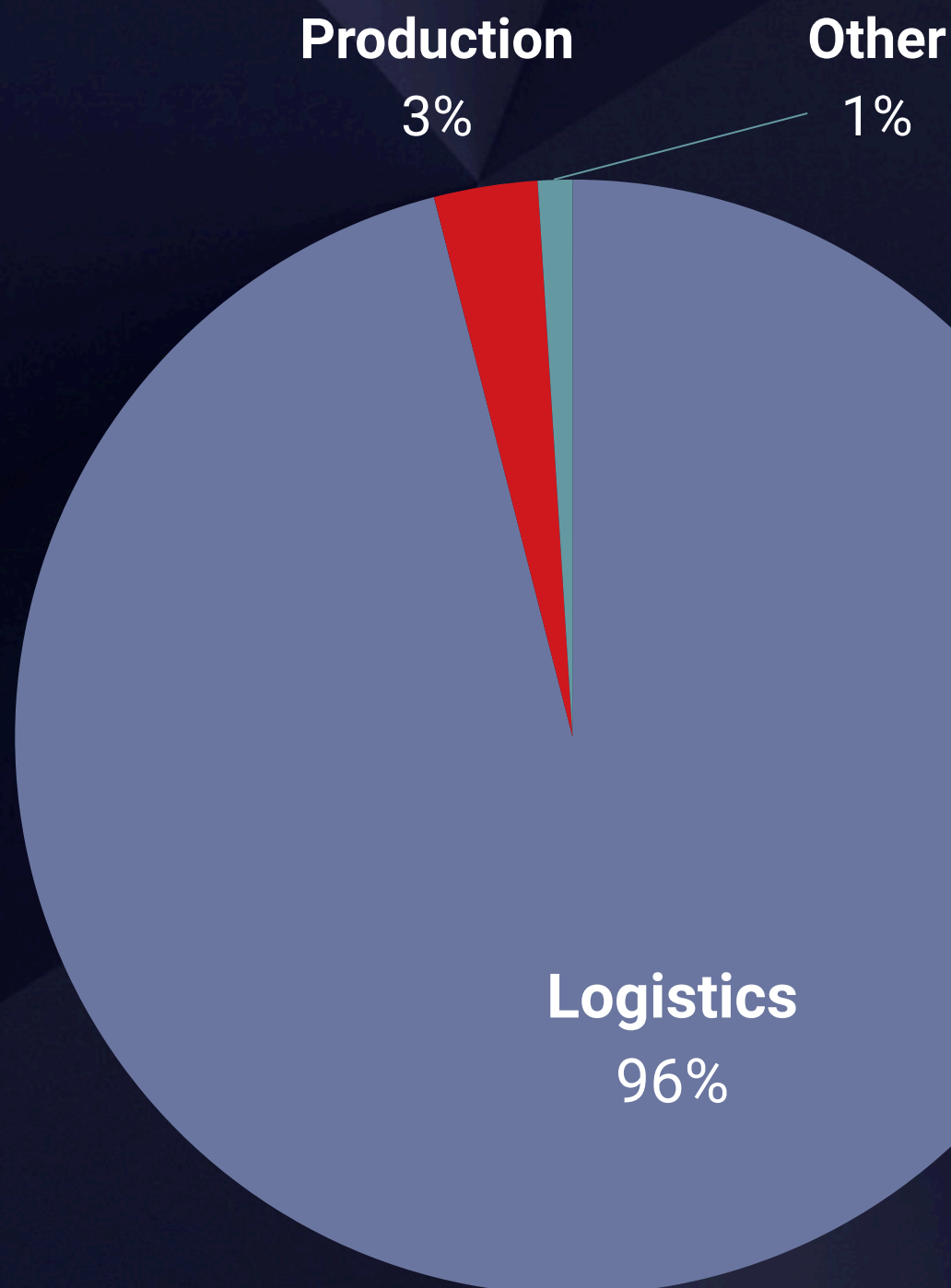
Prime rent

4.75€/SQM

Demand breakdown by area



Demand breakdown by activity



RESIDENTIAL MARKET

BUCHAREST & ILFOV



Apartments sales

11,275

Bucharest, Q1 2025

▼ **5.5 %** y-o-y

Average price /sqm

2,090€

New units, Q1 2025

Building permits

506

Bucharest & Ilfov, 2m 2025

▼ **0.6 %** y-o-y

1,960

Ilfov, Q1 2025

▲ **2.5 %** y-o-y

36,892

Romania, Q1 2025

▼ **4.9 %** y-o-y

4,535

Romania, 2m 2025

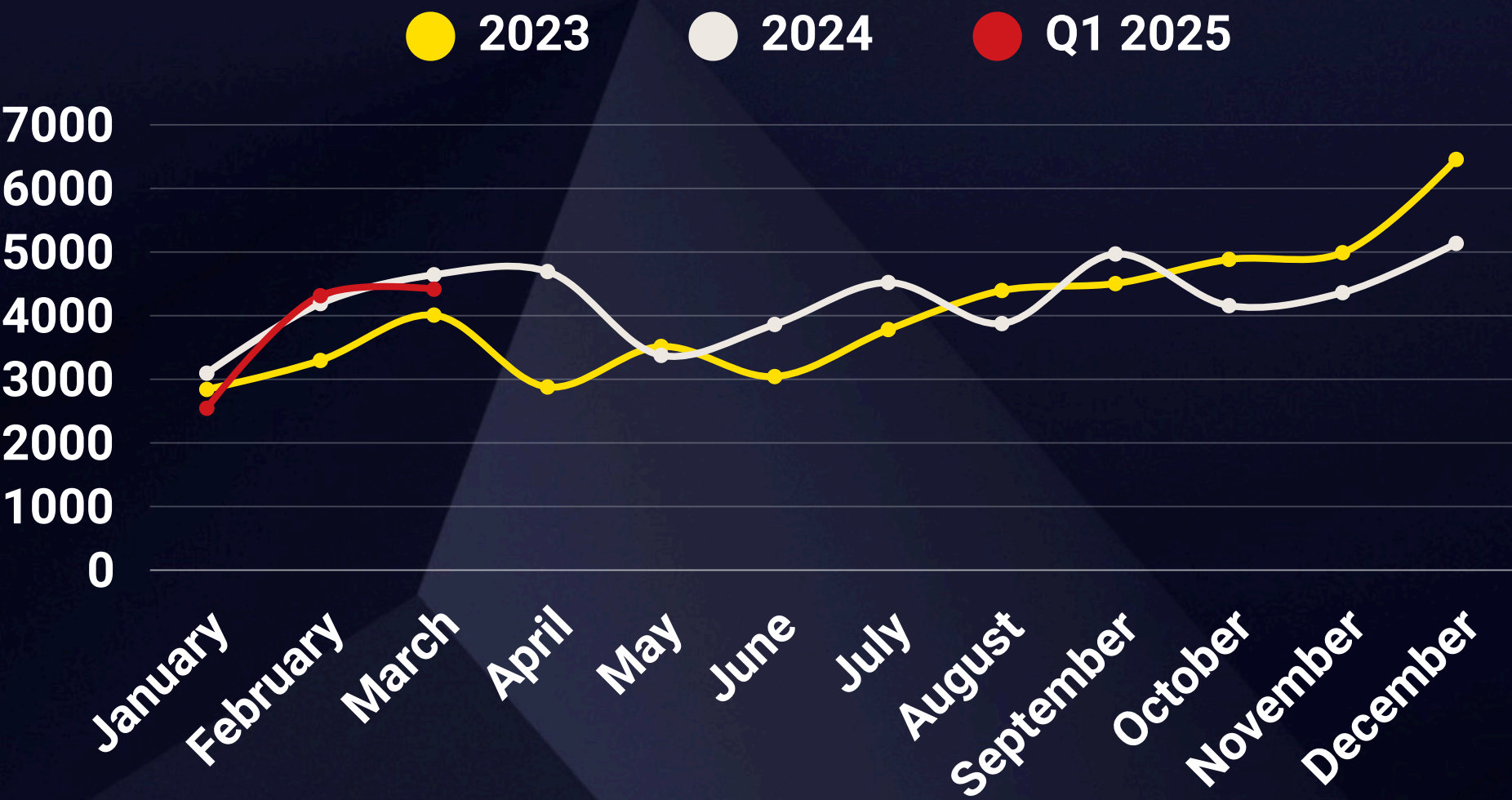
▲ **3.4 %** y-o-y

RESIDENTIAL MARKET

BUCHAREST & ILFOV



Apartment sales, Bucharest,
2023-Q1 2025



RESIDENTIAL MARKET

BUCHAREST & ILFOV



Apartment sales, Ilfov,
2023- Q1 2025





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