

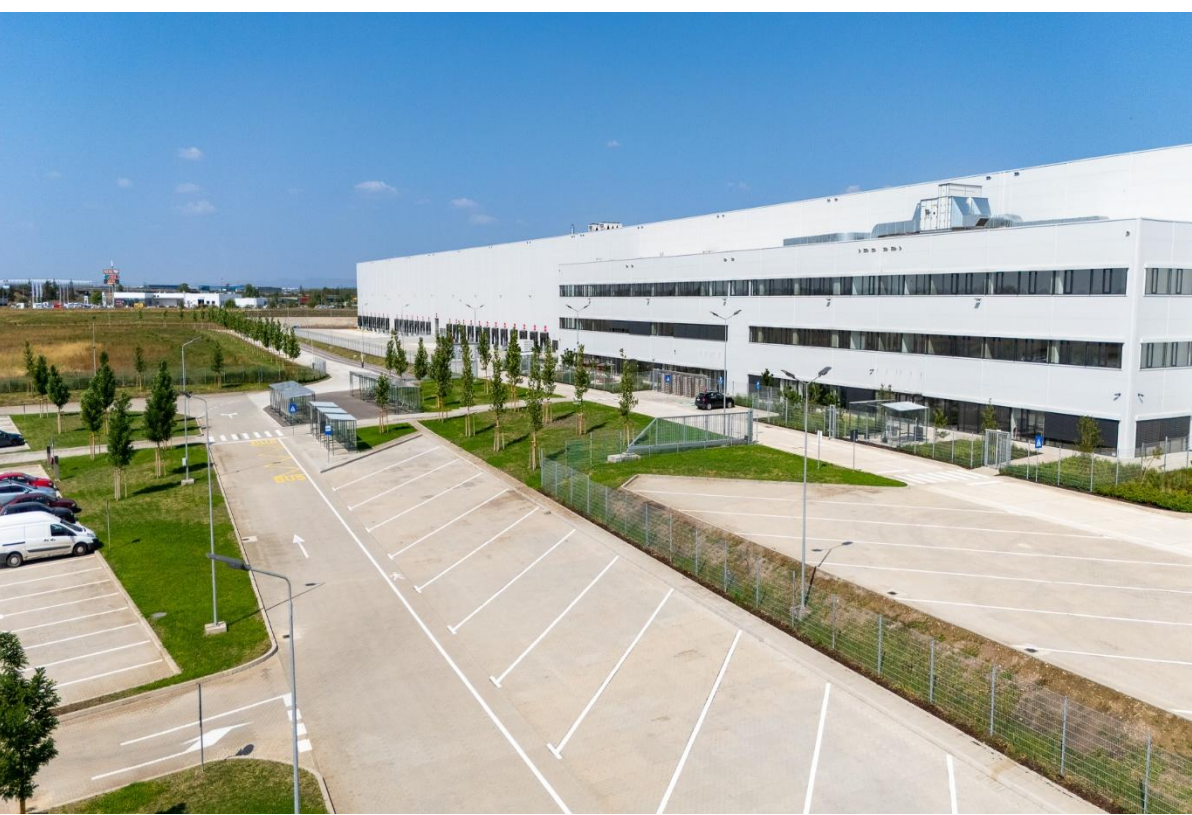


CTP Romania

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We are Parkmakers

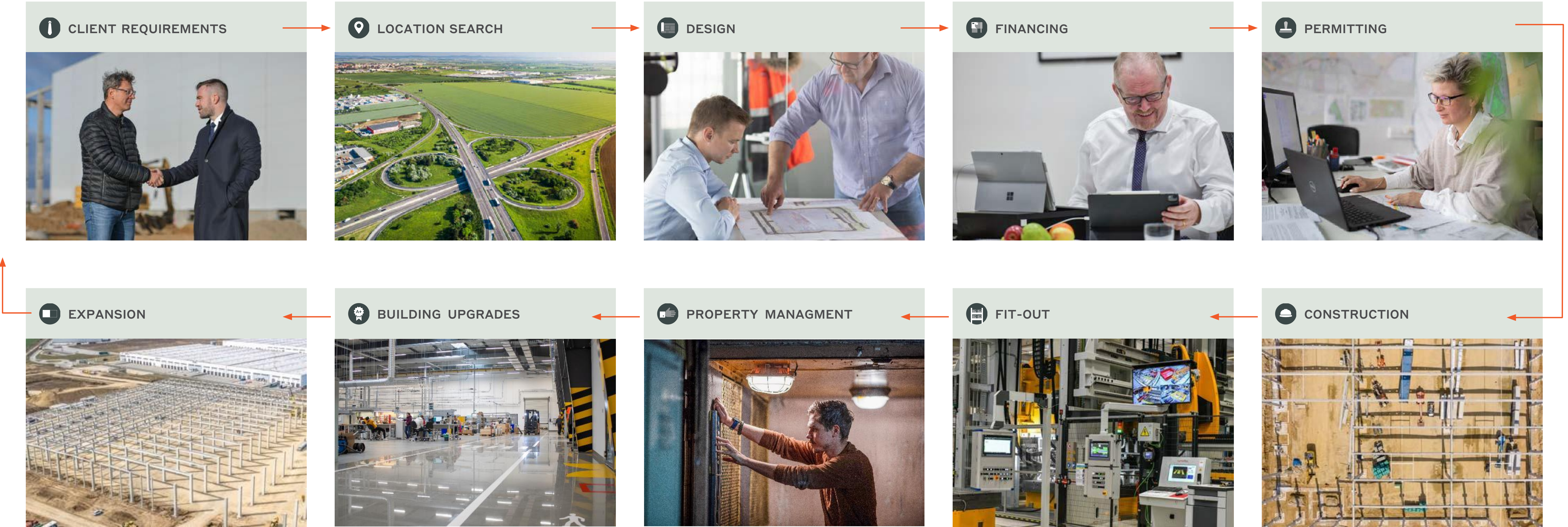
2026



OUR OFFER
.....

Full-Service Property Development: One-stop shop

The CTP platform is our in-house team of property professionals who provide personalised service to our clients from land acquisition to long term customer care after move-in providing our clients a one- stop shop for all their property needs allowing them to focus on their core business.



Leasing vs. owning real estate



SPEED TO MARKET

- **Owning:** land acquisition, permitting, and construction – all takes a lot of time
- **Leasing:** Move-in-ready or customisable spaces available – we have everything ready to go



EXPERTISE

- **Owning:** Requires coordination with many stakeholders—land scouts, local authorities, construction teams, etc.
- **Leasing:** We manage all aspects, backed by strong local knowledge



CAPITAL

- **Owning:** Requires significant upfront investment; capital is tied up in land and property
- **Leasing:** Preserves capital, allowing you to invest in your core business



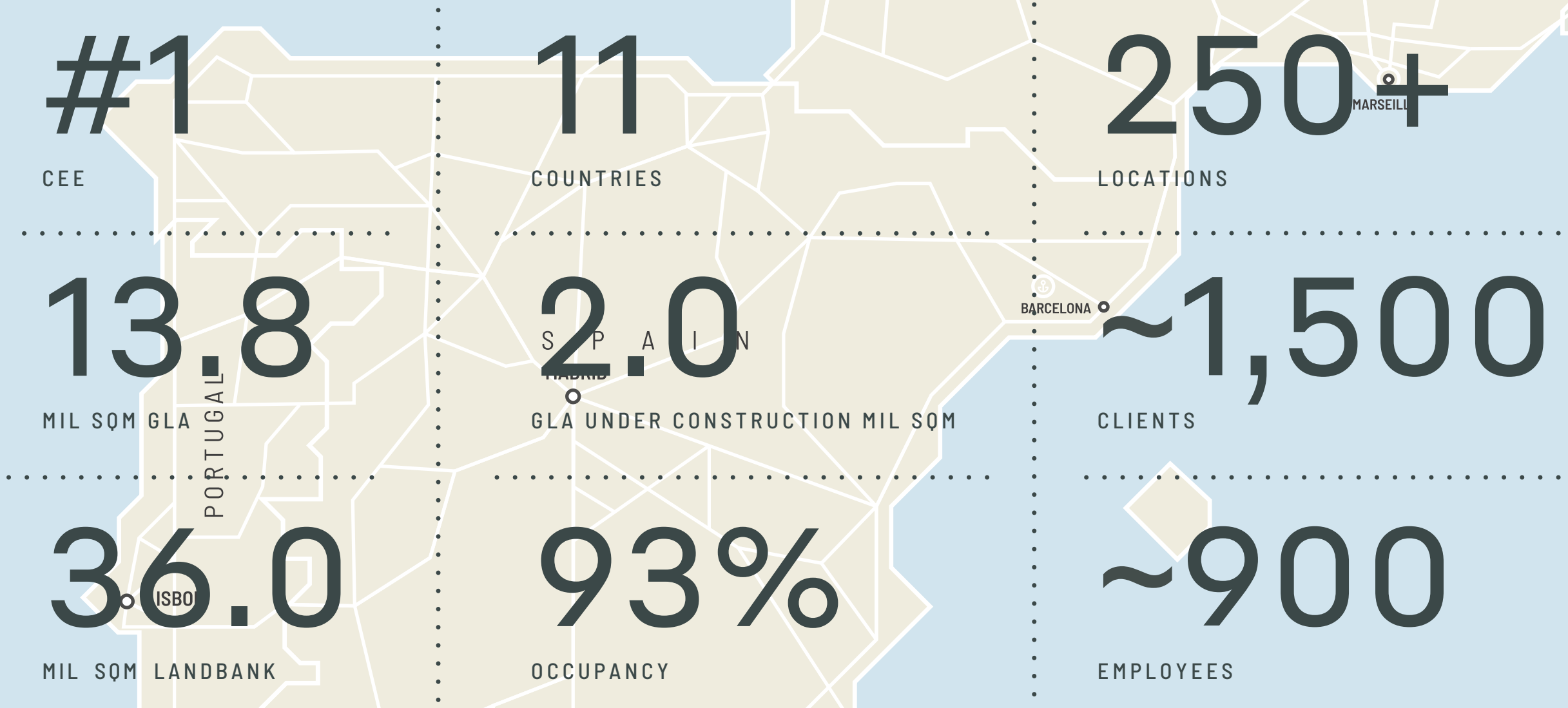
RISK AND MOBILITY

- **Owning:** Limits flexibility; you're committed to a fixed location unless you sell
- **Leasing:** We provide flexibility to relocate or expand based on business needs

CTPARK NETWORK

The Largest Park Network in CEE

The CTPark Network is the largest integrated system of business parks in CEE. With over 13.8 million sqm, over 200 locations, and a 36.0 million sqm landbank for client expansion, the CTPark Network supports our clients' growth anywhere in the region.



Romania's Position within the CTPark Network

- Strategic crossroads location – direct gateway between Eastern Europe, Central Europe, and Asia
- Access to both EU markets (500+ million consumers) and non-EU markets in the Balkans, Turkey, and the Caucasus
- Direct connectivity to Hungary, Bulgaria, Serbia, Moldova, and Ukraine, with additional linkage via the **Via Carpatia corridor, strengthening north-south connections** from Greece through Romania up to Poland and the Baltic States.

- Constanța Port – the largest Black Sea port, connecting Europe with Asia through maritime trade routes
- Three TEN-T corridors crossing Romania, enabling efficient EU-wide distribution
- Strong multimodal infrastructure: highways, railways, airports, and river transport (Danube)
- Ideal base for pan-European logistics, e-commerce, and manufacturing
- Full member of the EU & Schengen (from 2025) → streamlined customs and faster flows



Romania: The Country of Opportunities

2nd largest
CEE economy after Poland

\$325 billion
GDP growth above EU average

19.1 million
population

6th largest
city in Europe is
Romania's capital,
Bucharest





Romania

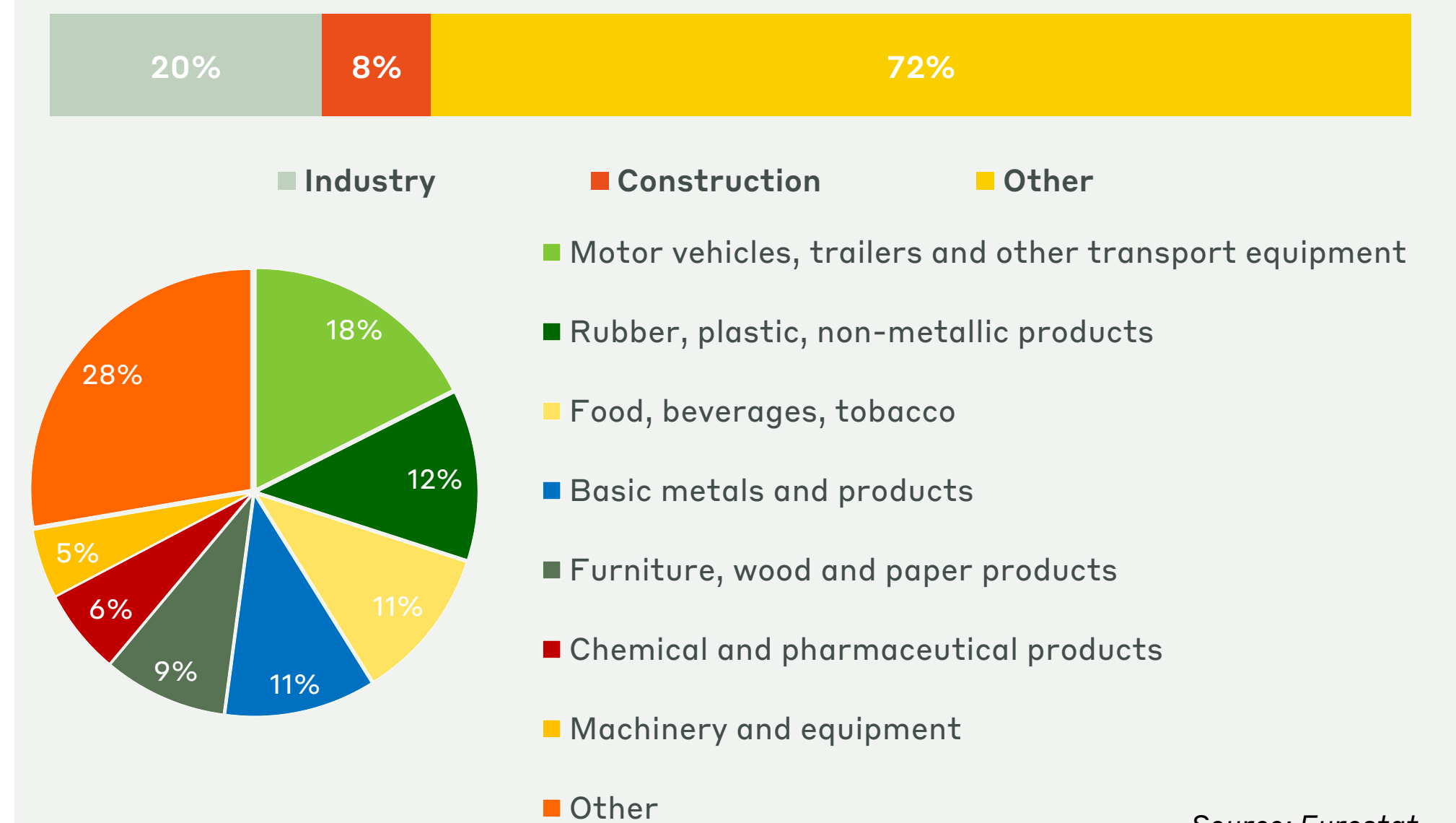
Country Fact Sheet

ctp

- EU member since 2007, **full Schengen entry in 2025** (land, air & sea borders lifted) stronger connectivity
- Strategic nearshoring hub: **Port of Constanța** (Black Sea access), skilled workforce, low labor costs, strong exports (machinery, automotive)
- Germany = top export partner, focus on EU trade
- 19th in Economic Complexity Index, **up 9 positions in last decade** (diversified exports)
- Leader in IT talent: 6th globally, **1st in Europe for certified IT specialists** per capita.

Sources: Oxford Economics, Eurostat, Harvard, International Trade Administration

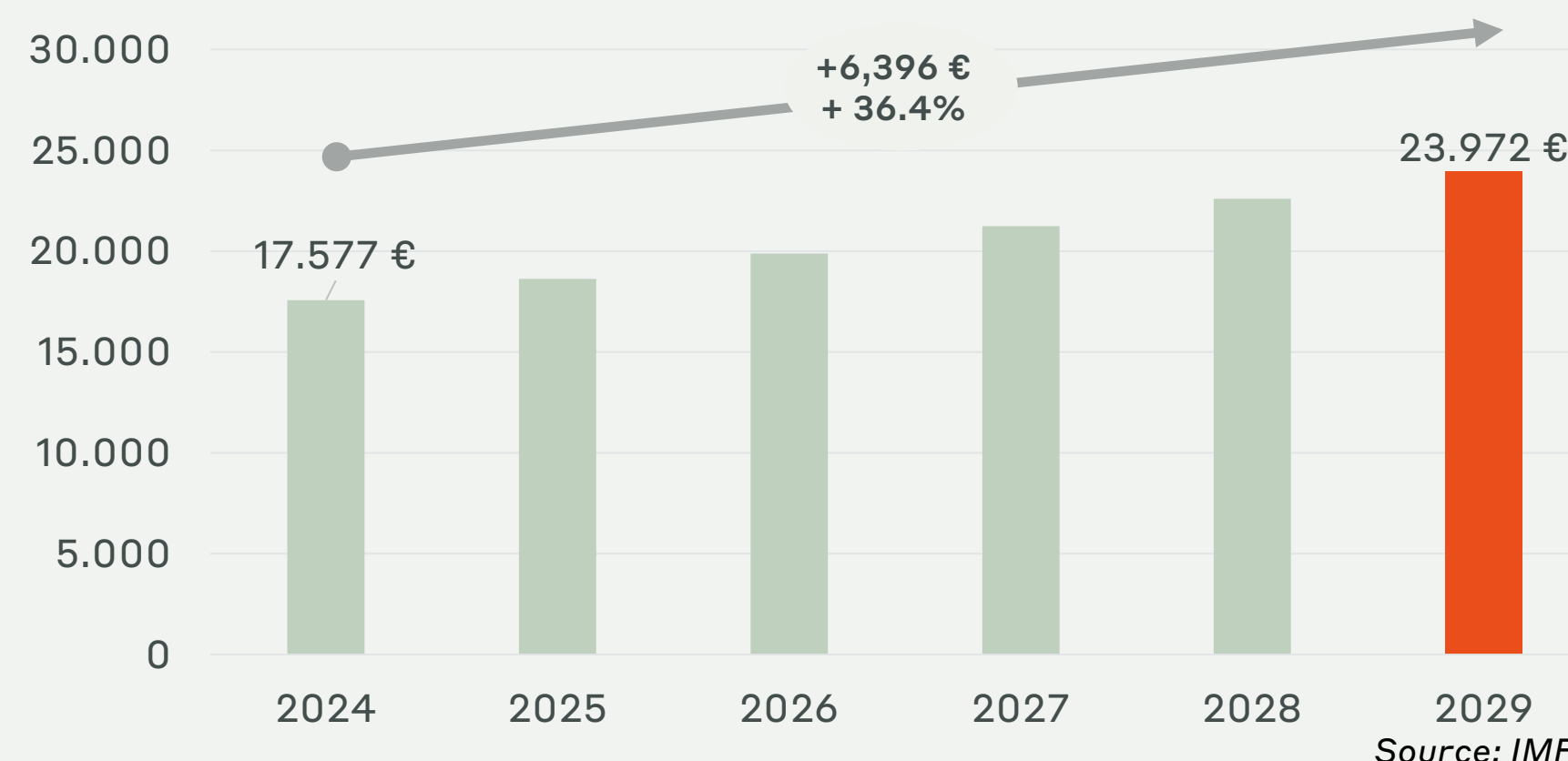
Structure of gross value added (%GDP)



Economy

GDP	€ 325.1 bln
GDP per capita (2023)	€ 17,085

GDP per capita growth forecast 2024 - 2029



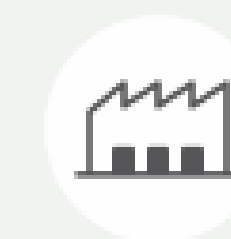
Labour

Population	19.1 mln
Population age 25-64	10.2 mln
Unemployment	5.6%

- STEM graduates: 28.4%
- High/medium-tech & KIS jobs: 31.4%
- Labour costs: €10.2/h (excl. construction)
- English skills: High

Source: Eurostat, EF EPI

Main Industries



- One of the **most competitive tech markets in CEE**
- Attractive for high-tech manufacturing
- International **companies clustered in major cities**
- Industrial production stable share of GDP & global output

Source: Oxford Economics

Why Choose Romania As Your Investment Destination

Strategic Location in Central Europe

Romania is the gateway between Europe and Asia, offering direct access to EU markets and strategic connections via the Black Sea.

Competitive Corporate Tax (16%)

While not the lowest in the EU, Romania's tax regime is stable and predictable, with additional tax exemptions and incentives for large investors.

Skilled and Cost-Effective Workforce

Romania has one of the largest, youngest, and multilingual workforces in Central & Eastern Europe, with lower labor costs than Western Europe.

Advanced Transport Infrastructure

Romania hosts Constanța – the largest Black Sea port, extensive highway and railway corridors (TEN-T), and major airports connecting to Europe and Asia.

Strong Export-Oriented Economy

Romania is a regional leader in IT, automotive, energy, and manufacturing, with exports driving economic growth and global competitiveness.

Governmental Incentives for Investors

The Romanian government offers state aid schemes, EU funds, tax reliefs, and fast-track approvals to support foreign direct investment.

CTP Romania

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CTPARK NETWORK
ROMANIA



CORE MARKET

COUNTRY DATA

MACROECONOMIC INDICATORS	
Credit rating	Baa3
MARKET INDICATORS (Q2-2025)	
Total stock (in mil. sqm)	8.0
Annual growth rate of stock (y/y)	7.2%
CTP market share	39.4%
Net take-up (in thousand sqm)	149.3
CTP share net take-up	14.4%
Market vacancy rate	5.1%
Prime rent sqm	€57.0
CTP INDICATORS (Q3-2025)	
Locations with standing portfolio*	35
GLA (in thousand sqm)	3,053
Projects under construction (in thousand sqm)	246
Landbank (in thousand sqm)	4,141
Client retention rate	71%
Like-for-like rental growth	1.8%
Annualised rent (in mil. EUR)	150.8
WAULT	5.6

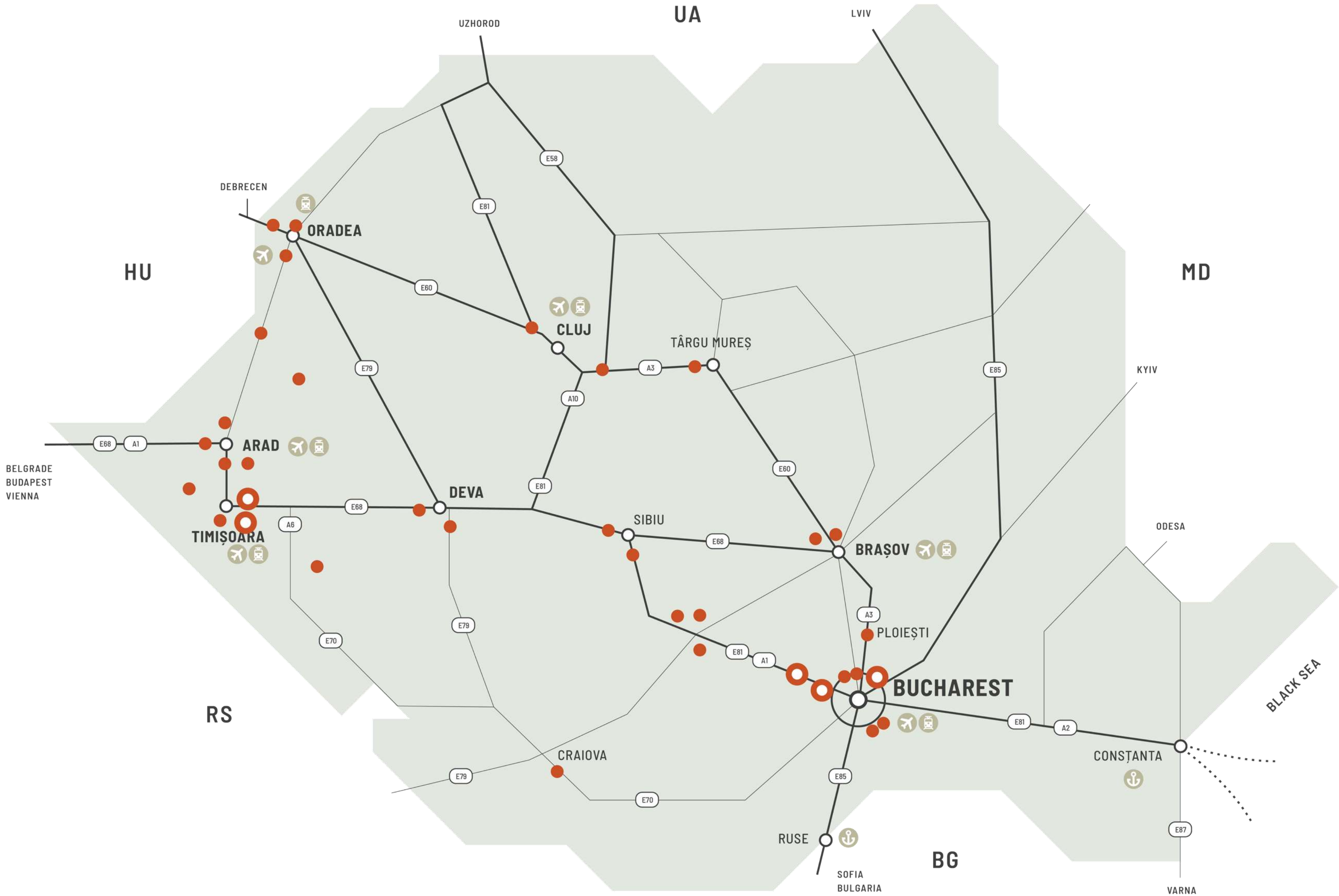
* includes only locations with existing GLA

KEY

- CTParks >100,000 sqm GLA
- CTP location <100,000 sqm GLA
- Planned

MARKETS

- Core Markets
- Growth Markets
- Western European Markets



It is your space
to do business

All shapes and sizes to match any business need

CTP has developed five bespoke building types ranging in size and functionality to support a broad spectrum of business activities.



ctBox



Designed for local companies and startups, this simple and functional building provides showroom, office and warehouse space.

Amtech

Vekra Windows

AkzoNobel



ctFlex



CTFlex offers a modifiable and expandable concept for small- and mid-sized companies with built-in offices and warehouses.

Acer

MAPO Medical

Zodiac Aerospace



ctSpace



The CTSpace concept is ideal for logistics operations, distribution centres or supply-chain hubs.

DHL

DB Schenker

DSV



ctFit



Ideal for the activities of large enterprises with special technical parameters, such as distribution hubs, chilled warehousing, high-tech manufacturing and R&D labs.

Honeywell

Brembo

Thermo Fisher Scientific



ctLab



ctLab is a cost-effective facility ideal for service centres, software/equipment design, R&D and back-office operations of all types of companies.

IBM

Vitesco

AeskuLab

CASE STUDY RABEN

#logistics #ctspacce #expansion

Raben

TOTAL SIZE
255,500 sqm

INDUSTRY
Logistics

HQ
Netherlands

15 locations
in 6 countries

Raben is one of the largest European logistics company. CTP is proud to have supported Raben for over a decade. Today they operate in six countries — the Czech Republic, Poland, Romania, Slovakia, Hungary and Austria — with CTP. Across 15 locations, their total GLA amounts to over 255,000 sqm.

Special features:

- ▶ Multiple location expansion
- ▶ Unique customisations at depending on location
- ▶ Strategic logistics locations

To support the company’s ambitious environmental goals, we helped them install Europe’s largest heat installation at CTP Warsaw West in 2024.

▶ Watch Raben’s case study about their operations in Bucharest.



JOLANTA SAWIŃSKA
Regional Director, Raben Logistics Polska regarding Raben’s move-in to CTPark Warsaw West:

"The project itself was extremely demanding - not only because of its scale but also because of the technological challenges we have set for our partners. [...]. I would like to thank everyone for their commitment and professionalism, which made it possible to complete this ambitious project" [2024]

CASE STUDY LPP

#logistics #ctspace #expansion



TOTAL SIZE
215,000 sqm

INDUSTRY
Retail distribution

BUILDING TYPE
CTSpace

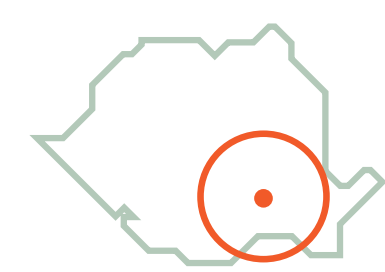
HQ
Poland

LPP, founded in Poland, is one of Central Europe’s fastest-growing fashion retailers. Known for its brands Reserved, Cropp, House, Mohito, and Sinsay, LPP operates nearly 2,500 stores and e-commerce sales across 40 markets worldwide.

In 2023, LPP partnered up with CTP to help launched their third distribution hub in Europe and its first in SEE. The country’s proximity to Central and Eastern Europe, coupled with easy access to LPP’s Asian suppliers via the nearby Port of Constanta, positioned it perfectly for supporting both regional and international operations.

The new building at CTPark Bucharest West has been designed with advanced logistics technology to support large-scale operations.

RO



CTPark Bucharest West

Special features:

- ▶ Rapid expansion
- ▶ Strategic logistics location
- ▶ Community facilities: medical point, Clubhaus
- ▶ Local workforce



SEBASTIAN SOŁTYS
President of the Management Board of LPP Logistic:

“The recognition of LPP brands in Southern Europe built for several years now is paying off in the form of positive results and optimistic sales forecasts. For logistics, this means the need to optimise processes and adapt them to growing volumes, so that at the final stage the customer can enjoy product availability and fast delivery. [...] An unquestionable advantage of this location is its strategic location in relation to the Black Sea port of Constanta, which makes it possible for us to diversify our shipping paths and receive the Group’s orders directly from Asian suppliers.”

Strong and diversified international client base

Low operational and financial risk

35.7%

Top 50 as a % of
portfolio GLA

32.7%

Top 50 as a % of
Rental Income





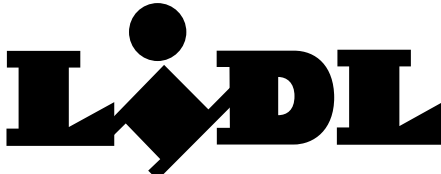



















Top 50 Clients
GLA split by industry (%)



NB: Figures may not add up due to rounding

OUR CLIENTS
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Possibilities: Over 1,500 satisfied clients in 11 countries trust us for property solutions across 5 different building types

3PLS	AUTOMOTIVE	E-COMMERCE, RETAIL, WHOLESALE & DISTRIBUTION	MANUFACTURING	HIGH TECH
		PRIMARK®		Honeywell
	•faurecia			wistron
				ThermoFisher SCIENTIFIC
 	 	 	 	Lenovo™
 	 	 	 	

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Rares Glod

Construction Director

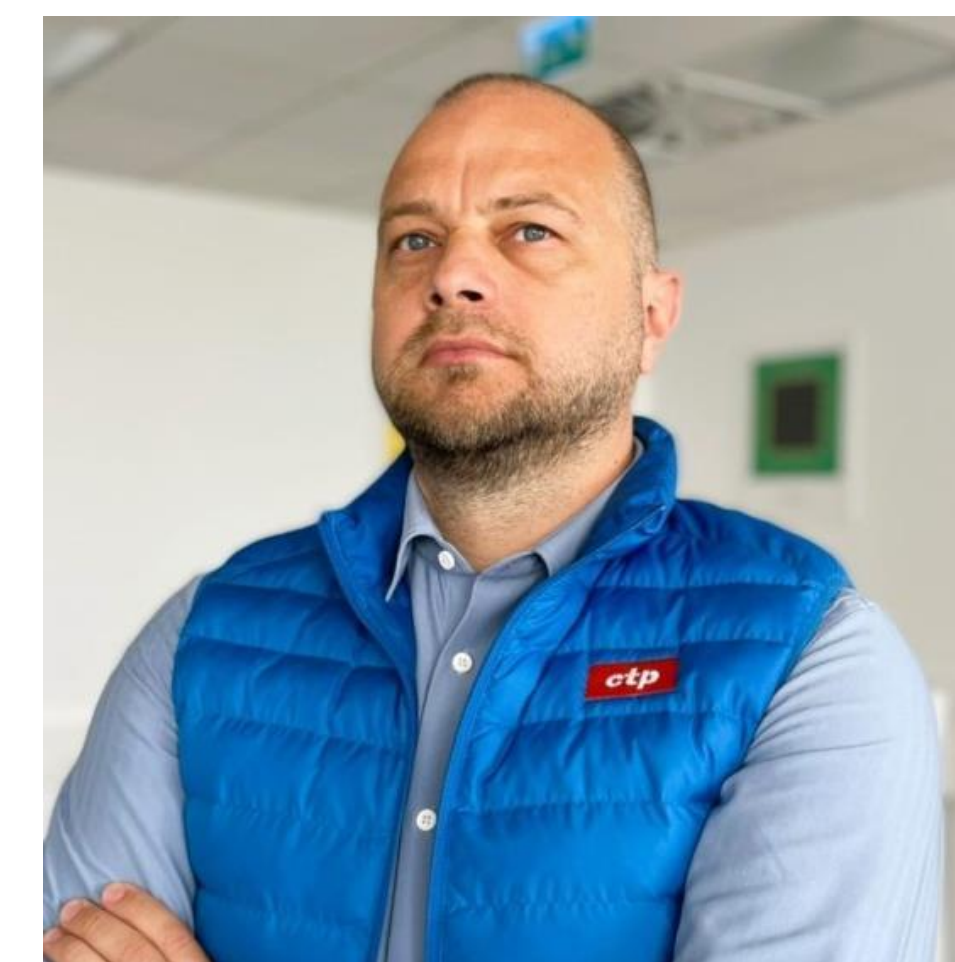
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Thank you



Mulțumesc!