

MARKET REPORT

RETAIL | YORK COUNTY, PA | Q3 2025



INVENTORY (SF) **27.33M** ↑ VACANCY RATE **4.23%** ↑ SALES (\$) **\$32.19M** ↑ SALES (SF) **225,262** ↑ LEASED (SF) **44,936** ↑ RENT CHANGE **+\$0.14** ↑
12-month rolling avg

Investment Properties Fueled Sale Transactions

HIGHLIGHTS

- Q3 investment sales brought YTD total sales 7% above 2024 year-end totals
- Cooling trends continued to stabilize lease rate growth, but reliable demand grew 12-month rolling average by 17%
- Shortly after BAM!'s announcement that their Whiteford Rd location in York will transform into a 2nd & Charles, the 33,000 SF of retail space next door, formerly Big Lots, was successfully leased to Savers

OVERVIEW

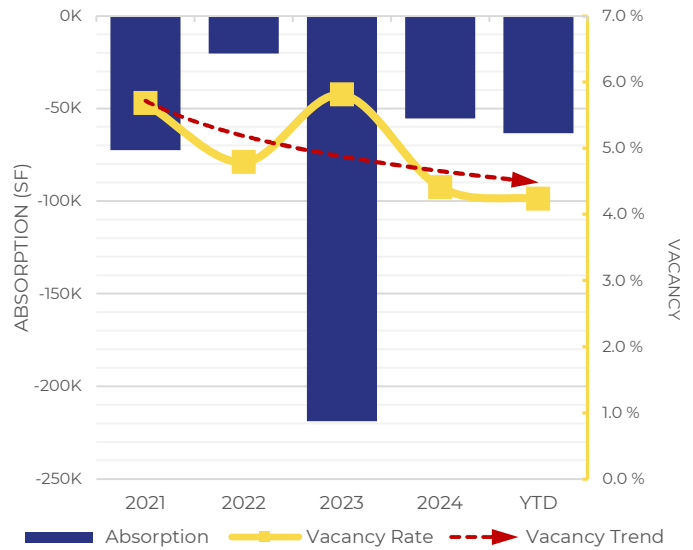
Overall low leasing activity YTD failed to outpace an influx of larger vacancies over 5K SF that entered the market in Q3, including former Rite Aid pharmacy spaces. Absorption's recovery during the first half of the year was reversed, and overall vacancy ticked up 5 bps to 4.23%.

Investment sales accounted for 88% of Q3's total sales, conveying national tenants like Dollar General and Sherwin Williams, and resulting in a 50% increase to overall average sale price to just over \$2M. Much of this activity was fueled by shopping center properties, especially three major transactions:

Property	Anchor Tenant	Sale Price	Sale Price/SF	Total Area
Dover Marketplace, Dover Township	Giant	\$16.4M	\$276.25	59,276 SF
Stillmeadow Plaza, Manchester Twp	None	\$3.6M	\$150.00	24,000 SF
East Market Plaza, Springettsbury Twp	None	\$3.4M	\$181.28	18,755 SF

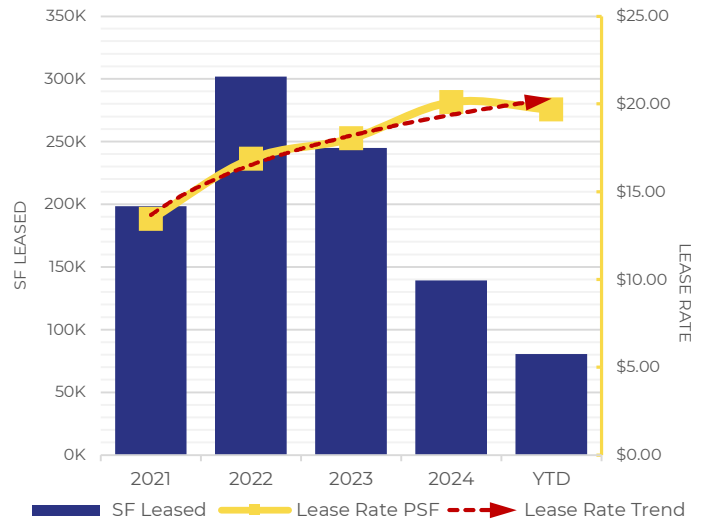
In tandem with investment activity, several redevelopment transactions contributed to impressive Q3 sale totals and helped keep projects moving through the pipeline. Former Barnhart's Inn at 3021 E Market St in York sold to Shiny Shell Car Wash who plans to build and open their new location by spring 2026. Former Zarfoss furniture at 21 W Broadway in Red Lion sold and will become a 29-unit loft style apartment building with two retail storefronts. Site work has already begun to construct a Taco Bell on a recently sold 2.22 acre pad site adjacent to the Tractor Supply in Red Lion.

NET ABSORPTION & VACANCY



* Absorption & Vacancy for Class A, B & C

SF LEASED & AVG LEASE RATE



* SF Leased includes Class A, B & C | Lease rate includes Class A & B only

RETAIL

YORK COUNTY, PA

Q3 2025

Key Sale Transactions

2130 Palomino Rd, Dover

SIZE	59,276 SF
SELLER	Dover GF LP
BUYER	United Hampshire US REIT
PRICE	\$16,375,000

555 Ryan Run Rd, York

SIZE	24,000 SF
SELLER	Ryan Run Properties LP
BUYER	Trone Family Trust
PRICE	\$3,600,000

3915-3945 E Market St, York

SIZE	18,755 SF
SELLER	East Market Street Group LLC
BUYER	East Market Street Plaza RE LLC
PRICE	\$3,400,000

4291 Delta Rd, Airville

SIZE	10,640 SF
SELLER	CD DG Sunnyburn LLC
BUYER	R&M Management Services LLC
PRICE	\$1,823,000

38 Memory Ln, York

SIZE	4,000 SF
SELLER	Radar SW York LLC
BUYER	L&T Investors, LLC
PRICE	\$1,022,500

For more information contact

EMILY KLINGLER
Research Analyst
(717) 850-0848
eklingler@rockrealestate.net

221 W Philadelphia St, Ste 19, York, PA 17401
313 W Liberty St, Ste 117, Lancaster, PA 17603

717.854.5357
ROCKrealestate.net

Key Lease Transactions

2960-3000 Whiteford Rd, York

SIZE	33,000 SF
TENANT	Savers
TRANSACTION	New

960 North Hills Rd, York

SIZE	6,000 SF
TENANT	Autopart International, LLC
TRANSACTION	Renewal

2131-2139 Industrial Hwy, York

SIZE	4,194 SF
TENANT	Revolution Dancewear, LLC
TRANSACTION	Extension

18 S George St, York

SIZE	3,815 SF
TENANT	Grandpa Joe's Candy Shop
TRANSACTION	New

2131-2139 Industrial Hwy, York

SIZE	2,047 SF
TENANT	Michael Kowalski
TRANSACTION	Renewal

