

MARKET REPORT

RETAIL | YORK COUNTY, PA | Q4 2025



INVENTORY (SF)	VACANCY RATE	SALES (\$)	SALES (SF)	LEASED (SF)	RENT CHANGE
27.30M ↓	4.29% ↑	\$12.52M ↓	121,439 ↓	14,295 ↓	-\$0.03 ↓ <i>12-month rolling avg</i>

Market Momentum Sustained Despite Softening Trends in Q4

HIGHLIGHTS

- A 1.35 acre tract of land off W Lincoln Hwy in Jackson Township sold in November will become a Dunkin' by summer 2026
- Sale totals improved for a third year following several major automotive property transactions throughout the year and median sale prices rose 12% from 2024
- Leasing activity from 2022-2025 revealed a decline in Class A and B leasing

OVERVIEW

Tariffs and trade policy uncertainties combined with a Q3-Q4 government shutdown caused disruptions and delays for long-term decisions within the retail sector. Wavering consumer confidence softened demand in the second half of the year, but market momentum was maintained by local economic resilience.

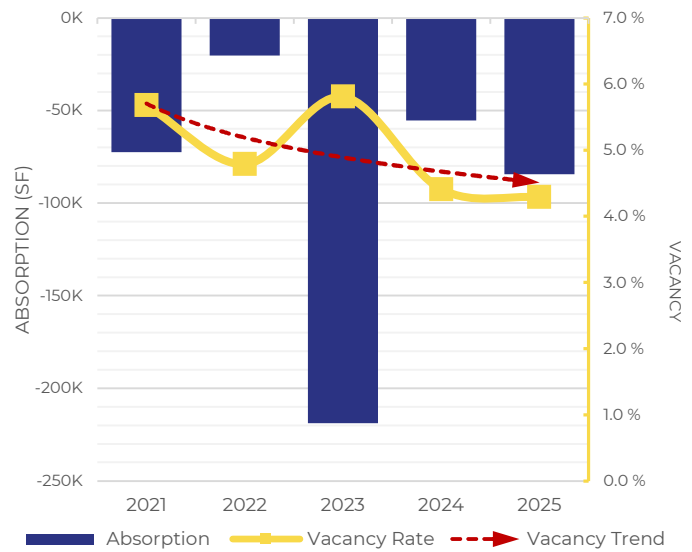
Service-based retail remained the main drivers of sale activity throughout the year. Automotive properties, including sales, service and gas stations, accounted for a third of the \$95.6M in total sales in 2025 and maintained average sale prices over \$1M for a second consecutive year.

Average unit sizes remained around 3K SF for a third year, and overall average lease rates lowered to \$17.93/SF. This stabilization followed four years of significant growth within average lease rates, up 46% from 2021-2025.

Broken down by subtype, shopping centers have been the exception to this growth trend, with average rents stabilized between \$16.80 - \$18.00/SF for the last five years. And when broken down by class, Class C average rents have hovered between \$14.00-\$15.00/SF since 2021. The proven reliability and resilience of these two asset types is expected to continue, with anticipated growth in 2026 as tenants continue seeking cost-effectiveness and adaptability.

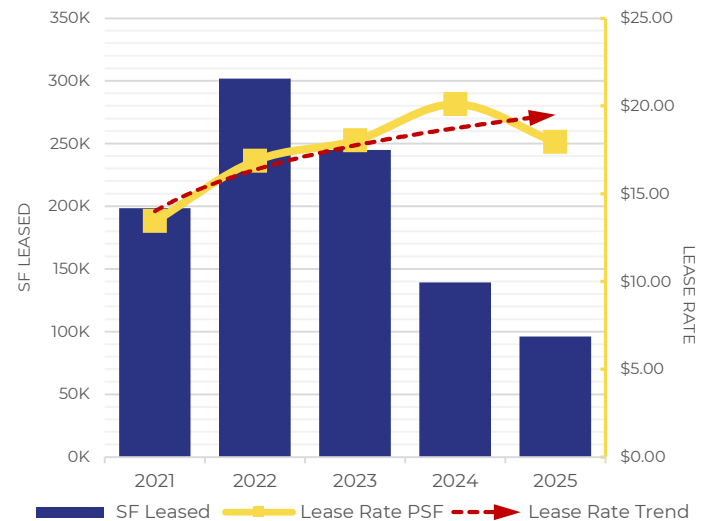
Work neared completion for West York's redevelopment project to convert a former bakery building into a mixed-use retail destination. The Bakery Project was partially funded by grants from DCED (Department of Community & Economic Development) and will bring 52,000 SF of experience-based retail attractions including food vendors, arcades, live events and automotive services from a rear garage.

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

Q4 2025

Key Sale Transactions

1955 Whiteford Rd, York

SIZE	12,560 SF
SELLER	Gradison Management LLC
BUYER	LTW LLC
PRICE	\$1,950,000

257 N Main St, Jacobus

SIZE	13,030 SF
SELLER	Grim Reaper Holdings LLC
BUYER	Werner Bros Auto Sales
PRICE	\$1,400,000

15180 Barrens Rd, Stewartstown

SIZE	20,375 SF
SELLER	Genesis Motor Werks Inc
BUYER	Hess Holdings Company LLC
PRICE	\$1,095,000

3608 E Market St, York

SIZE	3,125 SF
SELLER	Boardwalks Properties LLC
BUYER	3608 E Market LLC
PRICE	\$990,000

35 Kirkland Dr, Red Lion

SIZE	9,246 SF
SELLER	Kirkland Drive Associates
BUYER	35 Kirkland Drive LLC
PRICE	\$950,000

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Key Lease Transactions

2155 White St, York

SIZE	1,795 SF
TENANT	Oletowne Jewelers Inc.
TRANSACTION	Renewal

2811-2813 E Prospect Rd, York

SIZE	1,500 SF
TENANT	Michael Piragnoli
TRANSACTION	New

30-40 W Eleventh Ave, York

SIZE	1,040 SF
TENANT	Jay Skinz Tattoo LLC
TRANSACTION	New

4320 N George St, Manchester

SIZE	800 SF
TENANT	Krapf Bus Company
TRANSACTION	New

38 S Beaver St, York

SIZE	522 SF
TENANT	Editionstyles Vintage Shop
TRANSACTION	New

