

Strong cities



City attractiveness, office market, HR trends

Q4 2024

The office market sentiment, the investment potential of the city and the labour market.

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Tricity

Prepared
in cooperation with



Michael Page

Tricity

- ▶  **Agglomeration area**
5,316 sq km
- ▶  **Agglomeration population**
~1.6m (2021)
- ▶  **Population forecast for agglomeration**
~1.58m (2030)
- ▶  **Migration balance**
(+) 790
(Tricity)
- ▶  **Unemployment rate**
2.3%
(12.2024, GUS)
- ▶  **GDP growth**
9.7%
- ▶  **GDP per capita**
PLN 89,995
- ▶  **Average salary (gross)**
PLN 10,640.11 (Gdańsk)
(in the business sector,
12.2024, GUS)

Investment attractiveness

Rankings

1ST
PLACE

Outsourcing Stars 2021, 2022 in the City category
for **the fastest growing city in the BSS sector in Poland**,
Pro Progressio

1ST
PLACE

in 2022 for Tricity as **the most dynamically developing city in Poland**, CEE Shared Services and Outsourcing Awards

1ST
PLACE

in 2020 and 2022 for Tricity as **the best place to do business** in Poland by ABSL



European Entrepreneurial Region 2020



Gdańsk, Gdynia and Pomeranian Voivodeship
in **TOP 10 of fDi European Cities and Regions of the Future 2022/2023** ranking. Pomeranian Voivodeship in the category fDi strategy - medium-sized regions. Gdańsk was awarded a distinction as a business-friendly medium-sized city, and in the category of small cities, fDi strategy - Gdynia

Investment incentives

INVEST IN POMERANIA

Invest in Pomerania is a regional initiative supporting both foreign and domestic investors in establishing businesses in the Pomeranian region. It offers comprehensive support, from facilitating contact with local administration and business partners, to organizing reference visits and preparing economic reports. All services are provided free of charge, as Invest in Pomerania's main goal is the economic development of the Pomeranian voivodeship.

Economic zones

Employment grant and investment grant in the form of CIT exemptions.

Government support

Employment and investment cash grant for investors.

Live more. Pomerania

A dedicated informational campaign by the Pomeranian voivodeship, spearheaded by the Invest in Pomerania initiative. The aim is to attract potential employees, both from outside the region and internationally, actively seeking employment opportunities or contemplating a career change.



Quality of life

Rankings

1ST
PLACE

for Gdańsk in **People Friendly Cities 2020** ranking by Forbes

3RD
PLACE

for Gdańsk in **Quality of life category** in Emerging Europe Awards, 2020

2ND
PLACE

for Gdańsk in quality of life category during last 5 years according to **Report on the Quality of Life in European cities**

55TH
PLACE

in Europe – **Quality of Life** Index by Numbeo (mid-2022)

142ND
PLACE

in the world – **Quality of Life** Index by Numbeo (mid-2022)

Quality of life in numbers

- Gdańsk systematically monitors quality of life and residents' satisfaction.
- According to Report on the Quality of life in European Cities, 2020, Gdańsk residents declare satisfaction with life in the city at - 97%.
- Bronze award - Gdynia as an example of clean living quality, The International Awards for Liveable Communities 2021.
- In Gdynia there is a position in local government structure of vice-president for quality of life, who is responsible for education, health and smart city activities.
- In 2021, Gdynia joined the ranks of five cities in the world receiving ISO 37122 certification, a distinction designed for cities that effectively create and implement a sustainable development strategy using available technologies.
- Air protection program for the City of Gdańsk.
- Development of the groundwater monitoring system in the area of Gdańsk, Sopot and the commune of Pruszcz.



Bike paths
293,7 km








Green areas
123 sq km

Facts & Figures

- ▶ **Number of students**
86,400
- ▶ **Number of graduates**
19,521
- ▶ **Number of universities**
24
- ▶ **Airport - distance to the City centre**
15 km
- ▶ **Airport - number of passengers**
5,907,280 (2023)
- ▶ **BSS sector - number of centres**
209
- ▶ **BSS sector - number of employed**
40,500

Tricity




Q4 2024

- 
Existing stock
1.07m sq m
- 
Supply under construction
32,000 sq m
- 
Vacancy rate
12.5%
- 
New supply
19,000 sq m
- 
Take-up
116,000 sq m

Coworking operators in Tricity

Spaces | Regus | Chilliflex | O4 | Collab | City Space

Standard lease terms in new buildings

- 
Service charge
 PLN/sq m/month
17.00-30.00
- 
Rent-free period
1-1.5 month
 for each contract year
- 
Fit-out budget
 EUR/sq m
100.00-300.00

► The Tricity is one of four markets in Poland, alongside Warsaw, Kraków, and Wrocław, where total office stock exceeds one million sq m. However, the pace of new office development continues to slow.

In 2024, demand for office space in the Tricity reached 116,000 sq m, marking one of the highest levels in the market's history. Strong leasing activity, coupled with limited new supply, helped stabilize the vacancy rate which stood at 12.5% at the end of 2024.

SUPPLY

At the end of 2024, the total office stock in the Tricity exceeded 1.07m sq m. Throughout the year, only 19,000 sq m of new office space was delivered, marking the lowest annual supply since 2007.

Developer activity remains historically low, with less than 32,000 sq m currently under construction. The largest ongoing project is Palio Office Park C, covering 13,000 sq m, developed by Cavatina Holding.

TAKE-UP

In 2024, total office take-up in the Tricity exceeded 116,000 sq m, marking the second-highest result in the market's history. Gdańsk saw the highest tenant activity, with 96,000 sq m leased. The business services sector led demand, accounting for 21% of total take-up.

Lease renewals dominated the market, accounting for 50% of all transactions, highlighting the importance of cost considerations such as relocation and office adaptation. However, new leases also played a significant role, comprising 40% of total leased space. Expansions remained limited, representing only 3% of total transactions, while 6% of the volume was leased for owner-occupied purposes.

VACANCY RATE

At the end of Q4 2024, the vacancy rate in the Tricity stood at 12.5%, reflecting a 0.2 pp decrease q-o-q and a 0.8 pp decline y-o-y. This was the third-lowest vacancy rate among regional cities, behind Szczecin and Lublin.

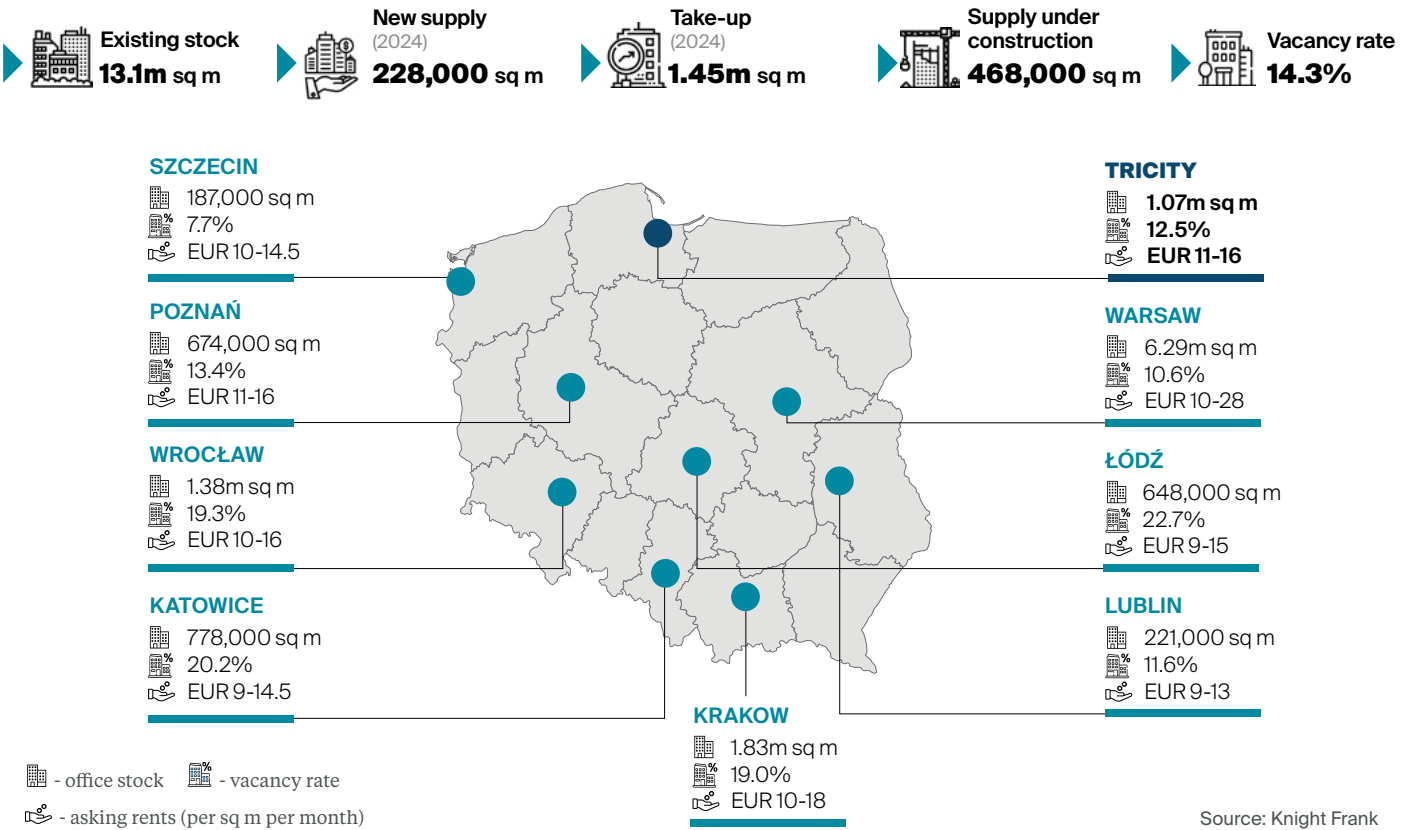
Gdańsk recorded the lowest vacancy rate at 9.5%, while Gdynia and Sopot had significantly higher levels, at 21.8% and 19.3%, respectively. Strong demand and limited new supply are expected to drive further reductions in vacancy rates in the coming quarters.

RENTS

At the end of Q4 2024, asking rents in the Tricity saw a slight increase, ranging from EUR 11.00 to 16.00/sq m/month. In newly developed buildings in prime locations, rents can reach even higher levels. Service charges remained stable, typically ranging between PLN 17.00 and 30.00/sq m/month.

Office market in Poland

Q4 2024



Salary and Trend Overview in Production, Warehouse Logistics, and Manufacturing in Poland

The year 2025, as a continuation of 2024, brings numerous challenges for the sector of production logistics, warehouse logistics, and manufacturing in Poland. Naturally, the context of these challenges is broader and involves changes across Europe and globally. The market is facing several significant difficulties related to growing challenges in operational efficiency, the need to attract qualified employees, and changing salary expectations, which are evident throughout Europe, with this increase being particularly noticeable in Poland.

Although the production and logistics industry plays a key role in the economy, its dynamics are constantly evolving, requiring companies to demonstrate flexibility and adapt to new economic realities and labor market challenges.

Salaries in Logistics and Manufacturing

According to industry reports, including one published by Michael Page, average salaries in production and logistics are expected to continue growing in 2025, although at a slower pace than the previous year. The level of remuneration largely depends on the specific position, location, and company size, but a general trend of rising salary expectations is observed across the market. In addition to macroeconomic factors and inflation, the increase in the minimum wage also plays a role, impacting not only the salaries of production workers and warehouse staff but also those in specialized, expert, and managerial roles.

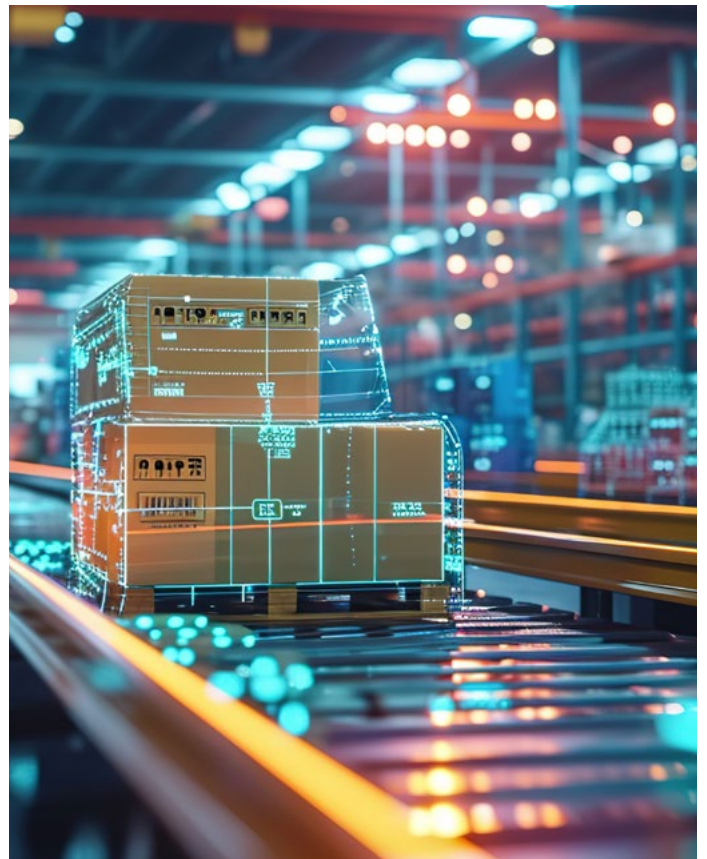
For another consecutive year, the gap in salaries between qualified experts and managers is expected to diminish, with the wage distance between these two groups narrowing.

The increase in wages in recent years, despite intense competition in the labor market, is a result of the growing automation and digitalization of production and logistics processes. Operational efficiency is becoming increasingly important, and achieving this without appropriate human and technological resources is difficult.

Recruitment in Logistics and Manufacturing: Challenges and Needs

With each passing year, as automation of processes advances, the demand for workers in logistics and manufacturing also increases, particularly in warehouse management, transport, and maintenance areas. It is estimated that, in 2025, the number of job vacancies in this sector in Poland could exceed 100,000. The logistics sector, especially with the intensive growth of e-commerce, requires adequately skilled employees who can meet the growing demands related to the speed and precision of deliveries.

According to a 2024 report from the Polish Institute of Logistics and Warehousing (PILM), 60% of companies in the warehouse and logistics industry report difficulties in recruitment, especially for manual laborers and middle management positions. Employers must rely on innovative methods of talent acquisition, such as





collaborating with technical universities, organizing internships, and creating career development programs. Companies often also turn to specialized headhunting firms to acquire the best talent, as they face challenges reaching them independently.

Automation and the Future of Employment

Trends indicate continued development in the automation of logistics, warehouse, and production processes, which may reduce the demand for manual labor in the short term. On the other hand, there is an increasing demand for specialists in the operation of advanced technologies such as robotics, automation, artificial intelligence, and the Internet of Things (IoT). These changes prompt companies to invest in the development of their employees' skills, offering courses and training related to modern warehouse systems or advanced production lines, and encouraging the search for new talent to strengthen existing teams.

Experts predict that in the coming years, the most sought-after specialists will include supply chain managers, logistics data analysts, and automation engineers. In the production sector, increasing importance will be placed on individuals involved in designing and implementing new technological solutions that enable more efficient process management. The manufacturing sector will also face the impact of artificial intelligence development and advancing automation, aiming to meet numerous standards, stabilize product prices, and improve cost efficiency.

Best Practices in Personnel Management in Logistics and Manufacturing

Companies in the logistics and manufacturing sectors that successfully attract and retain employees implement a range of best practices. Transparency in the recruitment process, aligning job offers with the actual needs of employees, and creating opportunities for career development are crucial factors before entering into collaboration with a potential candidate. Employers are increasingly adopting work flexibility, using hybrid work models for positions where this is technologically or process-wise feasible. Moreover, companies are investing in motivational and loyalty programs that support long-term retention of talent. These include, among other things, bonus programs and the development of career paths.

The logistics and manufacturing industries in Poland face many challenges, but their growth is essential to maintaining the competitiveness of the economy. Rising salaries, changing employee expectations, and the increasing role of technology are key elements shaping the future of the sector. Companies that successfully adapt to these changes will gain a competitive advantage in the market and can expect continued growth and enhanced operational efficiency.

Contacts

in Poland

+48 22 596 50 50
www.KnightFrank.com.pl

RESEARCH
Dorota Lachowska
dorota.lachowska@pl.knightfrank.com

COMMERCIAL AGENCY - TRÓJMIASTO
Joanna Gomułkiewicz
joanna.gomulkiewicz@pl.knightfrank.com

CAPITAL MARKETS
Krzysztof Cipiur
krzysztof.cipiur@pl.knightfrank.com

VALUATION & ADVISORY
Małgorzata Krzystek
malgorzata.krzystek@pl.knightfrank.com

STRATEGIC CONSULTING EMEA
Marta Sobieszczak
marta.sobieszczak@pl.knightfrank.com

INDUSTRIAL AGENCY
Przemysław Jankowski
przemyslaw.jankowski@pl.knightfrank.com

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PARTNER OF THE PUBLICATION:



CONTACT TO INVEST IN POMERANIA:
Al. Grunwaldzka 472 D
Olivia Business Centre - Olivia Six
80-309 Gdańsk

+48 (58) 32 33 256
office@investinpomerania.pl

Invest in Pomerania is a regional non-profit initiative bringing together institutions responsible for the economic development of Pomerania. Supports foreign investors in the implementation of investment projects in Pomerania, providing support at every stage of investment process and building the investment attractiveness of the region.

Michael Page

CONTACT:

Krzysztof Tuszyński
Head of Engineering Practice Poland

+48 798 506 871
krzysztoftuszynski@michaelpage.pl

www.michaelpage.pl