Warehouse market

H1 2025

The comprehensive guide to the warehouse market in Lower Silesia

knightfrank.com.pl/en/research

Lower Silesia

H1 2025

Existing warehouse stock
4.6m sq m

Supply under construction
60,000 sq m

Vacancy rate
9.6%

New supply (H1 2025)
290,000 sq m

Take-up (H1 2025)
415,000 sq m

Standard lease terms in warehouse buildings

Asking rents for warehouse space
EUR/sq m/month
4.00-4.70

Asking rents for office space
EUR/sq m/month
10.00-12.50

Service charge
PLN/sq m/month
4.00-7.00

Rent-free period
1-1.5 month

The Lower Silesia region is the fourth-largest warehouse market in Poland, benefiting from a well-developed road infrastructure that ensures efficient connections with the Czech Republic and Germany. The region's attractiveness is further enhanced by its location along the New Silk Road route from China, with a cargo terminal operating in Kąty Wrocławskie since 2020. At the end of Q2 2025, the warehouse stock in Lower Silesia reached 4.6m sq m, accounting for 12.7% of the national supply. Most of the projects are concentrated around Wrocław, as well as in smaller cities such as Bielany Wrocławskie, Kąty Wrocławskie, Nowa Wieś Wrocławska, Polkowice, and Pietrzykowice.

Warehouse stock in the region has been growing steadily — over the past year, total supply increased by 16%. However, the growth rate has slowed: in the first half of 2025, developers delivered over 290,000 sq m of modern warehouse space, marking a decline of over 21% compared to the same period last year. In Q2 2025 alone, only one facility was completed — the next stage of Panattoni Park Campus 2, comprising 25,000 sq m.

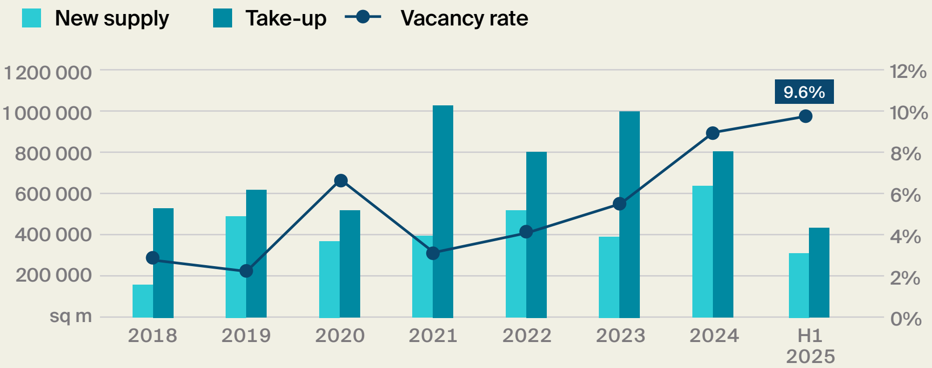
Developer activity remains very limited — at the end of June 2025, only 60,000 sq m was under construction. The largest ongoing project is another phase of Panattoni Park Campus 2, which commenced in Q2 2025. During this period, aside from this project, construction began on only two additional projects with a combined area of 8,500 sq m. Developers remain cautious about launching speculative projects, with 75% of space under construction already secured through pre-lease agreements.

The total leasing volume in Lower Silesia between January and June 2025 amounted to 415,000 sq m, representing a decline of over 20% year-on-year. The largest transactions in Q2 2025 included: a new lease at ECE Kąty Wrocławskie (79,000 sq m), a new lease at Panattoni Wrocław Campus 2 (38,700 sq m), and a lease renewal at Prologis Park Wrocław III (21,000 sq m). The leasing structure was dominated by new leases (60%), followed by renewals (37%), and expansions (3%).

The vacancy rate in Lower Silesia stood at 9.6% at the end of Q2 2025 — a 1.6 pp decrease compared to the previous quarter, although it remains above levels recorded a year ago.

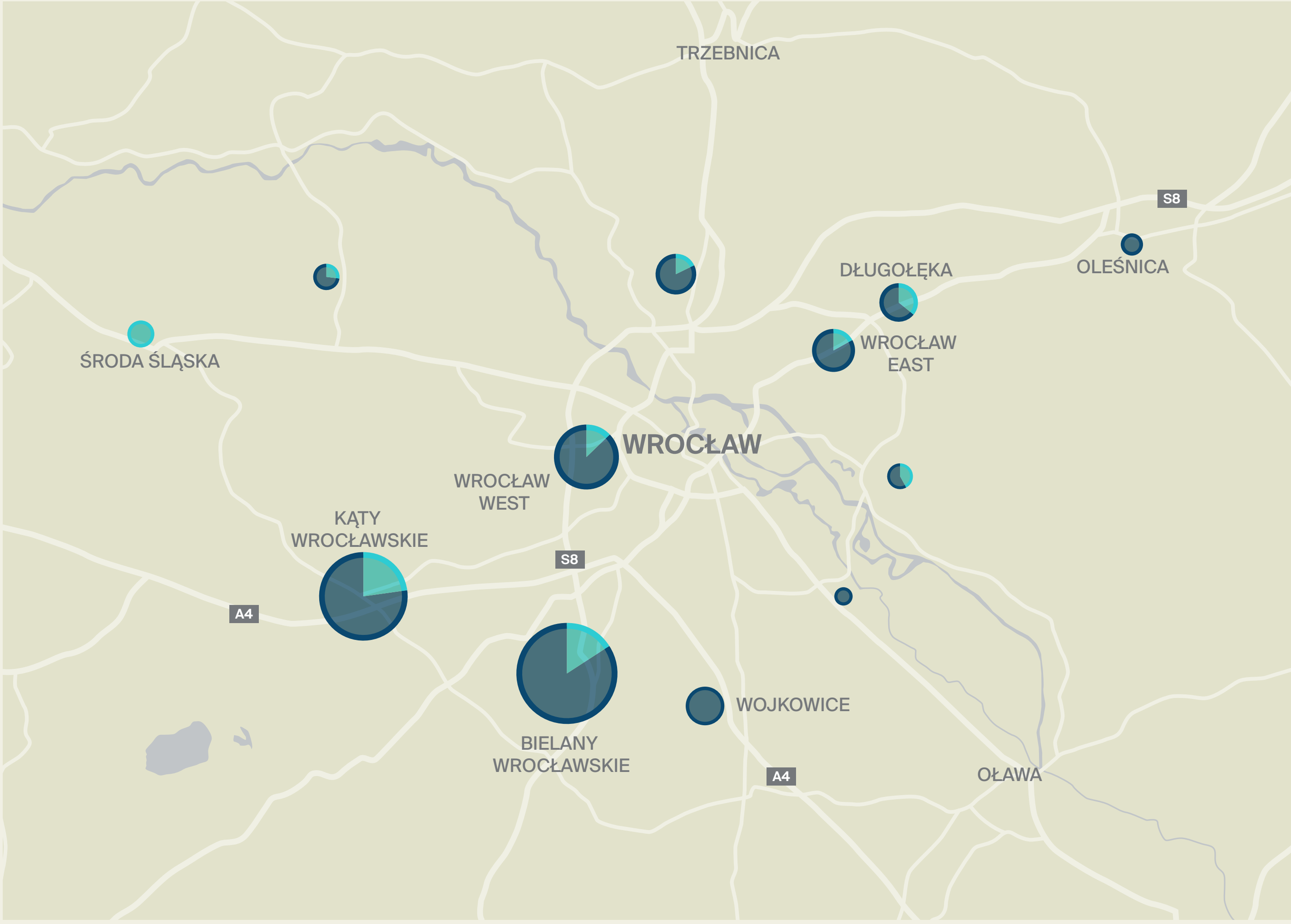
In Q2 2025, asking rents in the warehouse sector in Lower Silesia remained stable compared to the previous quarter.

New warehouse supply, annual take-up, vacancy rate in Lower Silesia



Source: Knight Frank

Location of warehouse developments in the region



Source: Knight Frank

Existing, under construction and planned warehouse space

% share of existing stock

% share of under construction and planned supply

TOP 5 warehouse destinations in the region

(by existing stock)

1. **Bielany Wrocławskie** 1.75m sq m
2. **Kąty Wrocławskie** 1.15m sq m
3. **Wrocław West** 510,000 sq m
4. **Wojkowice** 220,000 sq m
5. **Wrocław East** 200,000 sq m

Dolnośląskie Voivodeship

Population
2.9m

Voivodeship area
19,947 sq km

ECONOMIC DATA
(06.2025, STATISTICS POLAND)

Unemployment rate
4.8%

Average monthly salary
(enterprise sector)
PLN **9,920** (gross)

Average monthly salary
(transportation and storage sector)
PLN **7,970** (gross)

HIGH-SPEED ROADS

Highways
240 km
A4, A8, A18

Expressways
230 km
S3, S5, S8

CONTACTS IN POLAND:
+48 22 596 50 50
www.KnightFrank.com.pl

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

INDUSTRIAL AGENCY
Natalia Mika
natalia.mika@pl.knightfrank.com

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

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

As one of the largest and most experienced research teams operating across Polish commercial real estate markets, Knight Frank Poland provides strategic advice, forecasting and consultancy services to a wide range of commercial clients including developers, investment funds, financial and corporate institutions as well as private individuals. We offer:

- strategic consulting, independent forecasts and analysis adapted to clients' specific requirements,
- market reports and analysis available to the public,
- tailored presentations and market reports for clients.

Reports are produced on a quarterly basis and cover all sectors of commercial market (office, retail, industrial, hotel) in major Polish cities and regions (Warsaw, Kraków, Łódź, Poznań, Silesia, Tricity, Wrocław, Lublin, Szczecin) and PRS sector in Poland. Long-term presence in major local markets has allowed our research team to build in-depth expertise of socio-economic factors affecting real estate market in Poland.

Knight Frank Research
Reports are available at

Substantive preparation: Szymon Sobiecki / Research / Knight Frank

Graphic design: Karolina Chodak-Brzozowska / Art Director / PR & Marketing / Knight Frank