

Warehouse market



Q1 2025

The comprehensive guide to the warehouse market in Lower Silesia

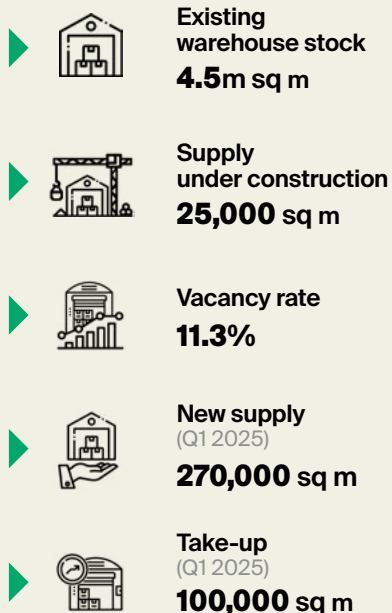
knightfrank.com.pl/en/research

A collage of nine images showing the interior of a large warehouse. The images are arranged in a grid: three in the top row, three in the middle row, and three in the bottom row. The central image in the middle row is a large green-tinted image with the text "Lower Silesia" overlaid. The other images are in black and white or have a green tint, showing various angles of the warehouse's steel structure, beams, and lighting.

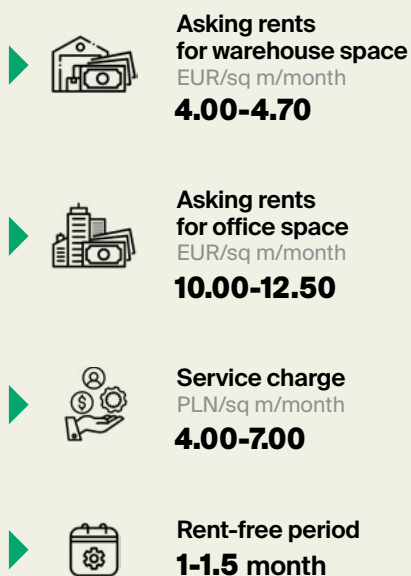
Lower Silesia

Lower Silesia

Q1 2025



Standard lease terms in warehouse buildings



The Lower Silesia region ranks fourth in terms of warehouse market size in Poland, standing out for its favorable conditions for manufacturing and distribution companies and its well-developed road infrastructure, which provides fast connections to the Czech Republic and Germany. Additionally, the region's attractiveness is enhanced by its location on the New Silk Road route, with a cargo terminal operating since 2020 in Kąty Wrocławskie. At the end of the Q1 2025, Lower Silesia's warehouse stock amounted to 4.5m sq m, which accounted for nearly 13% of the warehouse space in Poland. Most of the space is located around Wrocław, Bielany Wrocławskie, Kąty Wrocławskie, Nowa Wieś Wrocławska, Polkowice, and Pietrzykowice.

The region's stock is growing steadily and has increased by almost 18% over the past year. In Q1 2025, nearly 270,000 sq m was completed, which is the highest result among the main warehouse centers in the country. New supply remained at a level similar to that of the same period last year and increased compared to the last quarter of 2024. The largest completed schemes include: a 92,300 sq m hall in P3 Wrocław, a hall in GLP Wrocław V Logistics Centre (67,500 sq m) and a warehouse in Panattoni Park Wrocław Logistics South Hub (35,000 sq m).

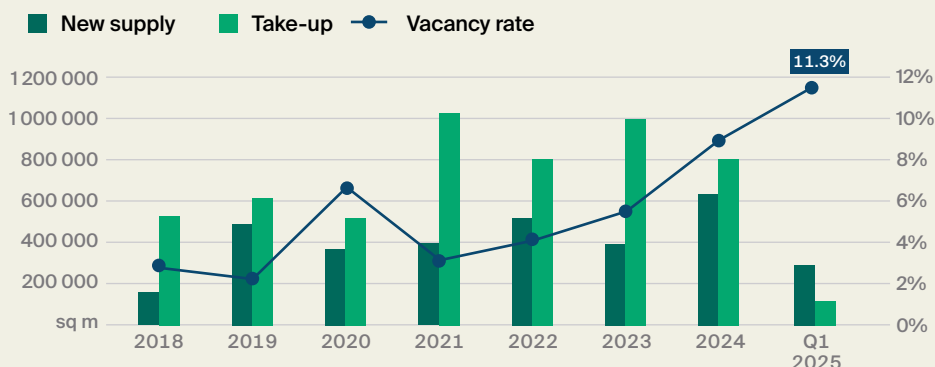
However, development activity decreased significantly, and at the end of March 2025, only one scheme with an area of 25,000 sq m remained under construction as part of Panattoni Wrocław Campus 2, which is being developed on a speculative basis. In Q1 2025, tenants signed agreements for 100,000 sq m, which represents a 40% increase compared to the same period last year.

The largest transactions included a lease renewal at Mapletree Park Wrocław II (26,200 sq m), a new lease at Prologis Park Wrocław IV (14,600 sq m) and a renewal at Wrocław Logistics Park Bielany (13,400 sq m). Renewals accounted for 51% of signed contracts, new contracts for 34% and expansions for 15%.

The vacancy rate in Lower Silesia at the end of Q1 2025 was 11.3%, which represents an increase of 2.3 pp compared to the previous quarter. The rise was driven by lower tenant activity, with tenants focusing mainly on renewals, as well as the emergence of new supply that has not yet been fully leased.

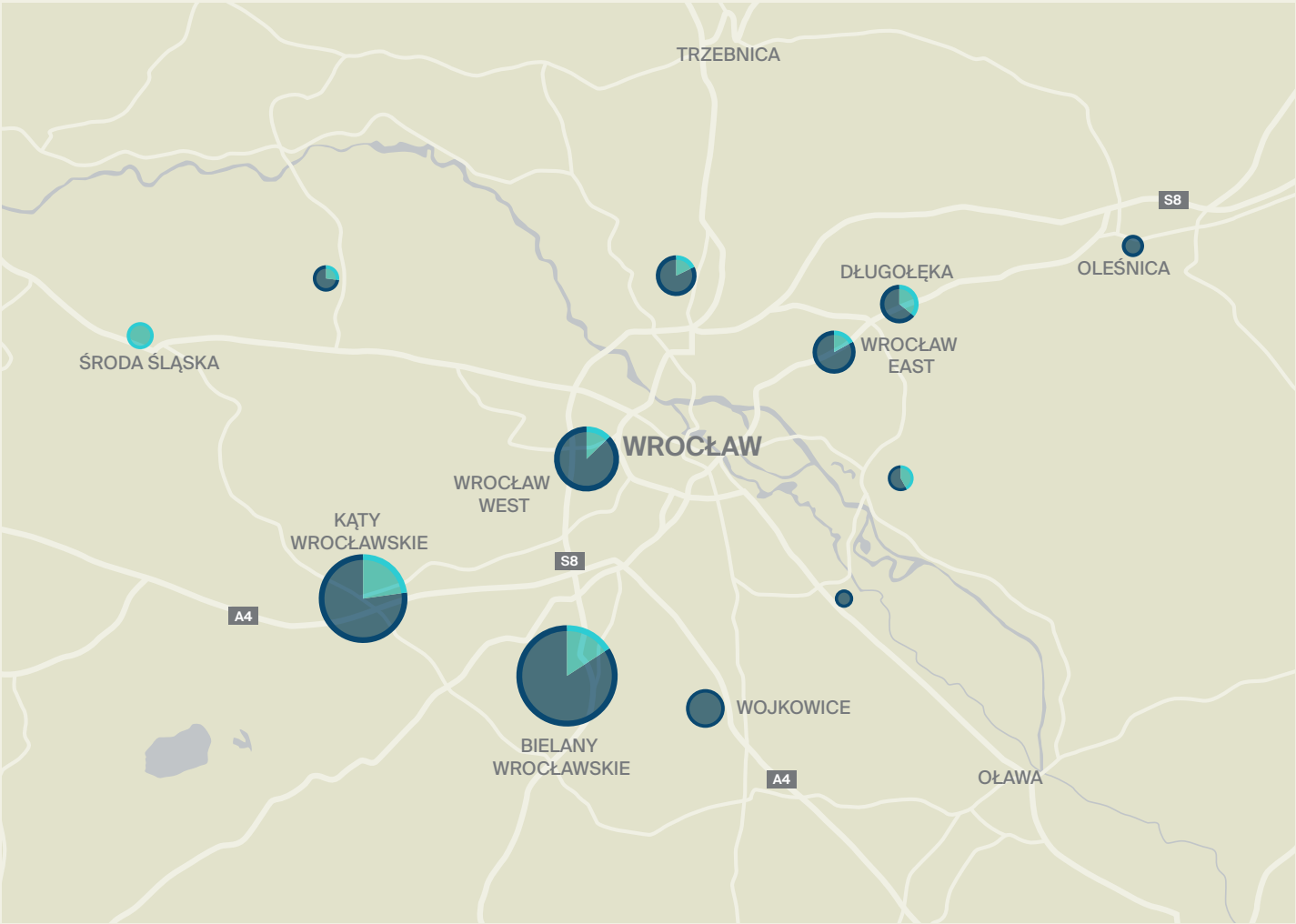
Asking rents in the warehouse sector in the region remained stable compared to the previous quarter.

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
1.7m 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
(03.2025, STATISTICS POLAND)



Unemployment rate
4.9%



Average monthly salary
(enterprise sector)
PLN 9,151 (gross)



Average monthly salary
(transportation and storage sector)
PLN 8,002 (gross)

HIGH-SPEED ROADS



Highways
240 km
A4, A8, A18



Expressways
230 km
S3, S5, S8

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