

# Warehouse market

Q4 2025

The comprehensive guide to the warehouse market in Lower Silesia

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LOWER  
SILESIA

# Lower Silesia

Q4 2025

 Existing warehouse stock  
▲ **4.6m sq m**

 Take-up (2025)  
▲ **850,000 sq m**

 New supply (2025)  
▼ **300,000 sq m**

 Supply under construction  
▼ **110,000 sq m**

 Vacancy rate  
▼ **9.7%**

## 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 and one of the most strategically positioned logistics hubs in the south west of the country. Its attractiveness is driven by highly favourable conditions for both manufacturing and distribution activities, supported by a well developed transport network that ensures efficient connectivity with Czech Republic and Germany. The region also benefits from its location along the New Silk Road corridor from China, further strengthened by the cargo terminal operating in Kąty Wrocławskie since 2020.**

At the end of Q4 2025, warehouse stock in the Lower Silesia region was estimated at approximately 4.6m sq m, accounting for 12.6% of Poland's total modern warehouse supply. Most logistics facilities are concentrated in and around Wrocław, with key clusters located in Bielany Wrocławskie, Kąty Wrocławskie, Nowa Wieś Wrocławska, Polkowice and Pietrzykowice.

Warehouse stock in the region continued to expand, increasing by 8.6% y/y, although the pace of new supply noticeably slowed. Since the beginning of 2025, developers completed around 300,000 sq m of new space, a drop of over 50% compared with 2024 and roughly 100,000 sq m below the five year average. Between October and December, only one project was delivered: a 6,000 sq m facility at Ideal Idea City Wrocław. The largest completions in 2025 included new buildings at P3 Wrocław (92,300 sq m), GLP Wrocław V Logistics Centre (67,500 sq m) and Panattoni Park Wrocław Logistics South Hub (35,000 sq m).

Development activity remains subdued. At the end of December 2025, approximately 110,000 sq m of warehouse space remained under construction, the majority of which comprised the final building within Panattoni Park Campus 2 with a total area of 78,600 sq m. The development pipeline declined significantly both quarter-on-quarter and year-on-year. In Q4, only 5,900 sq m of new construction was commenced within Segro Business Park Wrocław 2, confirming a cautious approach to new developments. At the same time, approximately 70% of the space under development had been secured with pre-lease agreements.

The total volume of lease agreements signed in the region in 2025 amounted to just under 850,000 sq m, placing Lower Silesia fourth among the major warehouse markets in Poland. Demand was nearly 8% higher than a year earlier, although slightly below the five-year average. The largest transactions included a new lease at ECE Kąty Wrocławskie (79,200 sq m), a renewal at P3 Wrocław II (78,100 sq m), and a new lease at Panattoni Park Campus 2 (38,600 sq m).

The vacancy rate at the end of Q4 2025 stood at 9.7%. Despite limited new supply, the vacancy rate increased by 0.7 pp year-on-year, mainly due to the high share of renegotiations in the leasing structure.

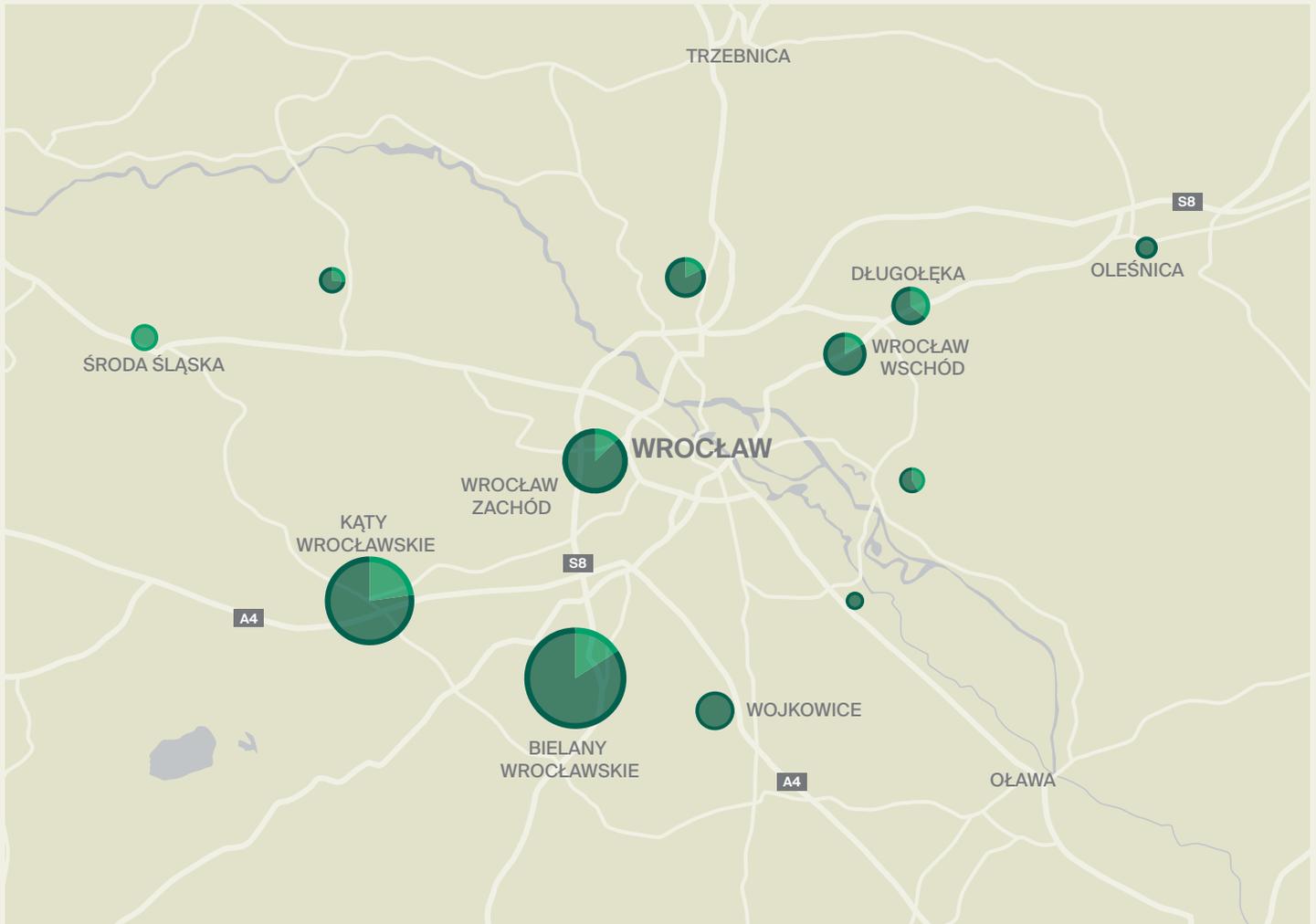
At the same time, asking rental rates in the region remained stable and showed no significant change compared with the previous quarter, ranging between EUR 4.00 and 4.70 per sq m per month.

## 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 (12.2025, STATISTICS POLAND)



Average monthly salary  
(enterprise sector)  
**PLN 10,100** (gross)



Unemployment rate  
**5.3%**



Average monthly salary  
(transportation and storage sector)  
**PLN 8,600** (gross)

### HIGH-SPEED ROADS



Highways  
**240 km**  
A4, A8, A18



Expressways  
**230 km**  
S3, S5, S8

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