Warehouse market

Q1 2026

The comprehensive guide to the warehouse market in Lower Silesia

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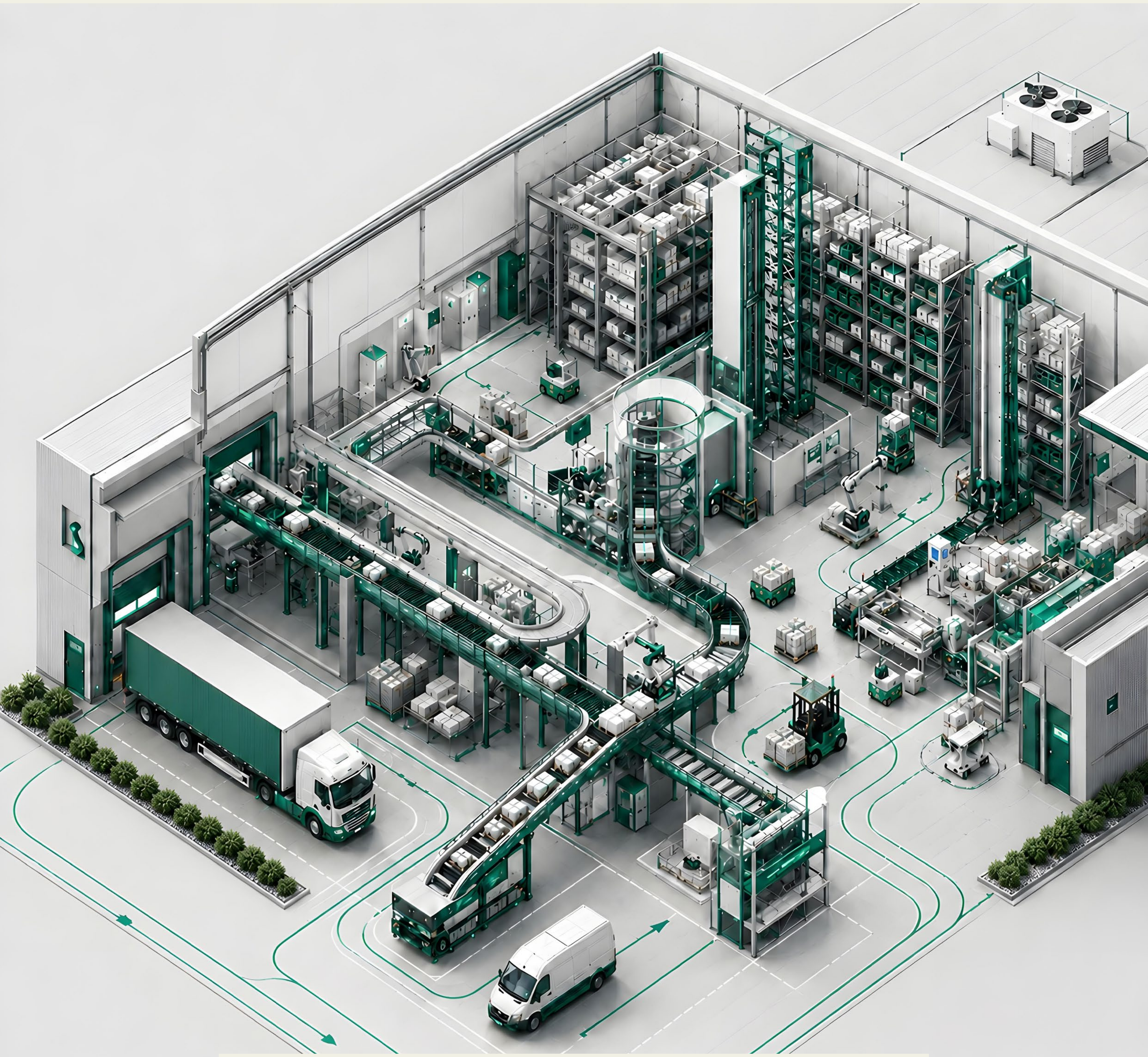


WROCŁAW

Wrocław

Q1 2026

Existing warehouse stock
4.6m sq m

Take-up
(Q1 2026)
210,000 sq m

New supply
(Q1 2026)
0 sq m

Supply under construction
110,000 sq m

Vacancy rate
6.8%

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
per each year of lease term
1-1.5 month

The Wrocław region remains Poland's fourth-largest industrial and logistics market. Its attractiveness for manufacturing and distribution operations is primarily driven by its well-developed transport infrastructure, providing efficient connections to the Czech Republic and Germany. An additional competitive advantage is the region's location along the New Silk Road corridor, supported by the operation of the cargo terminal in Kąty Wrocławskie.

At the end of Q1 2026, the region's modern warehouse stock totaled approximately 4.6m sq m, representing 12.3% of Poland's total industrial and logistics supply. Warehouse development remains concentrated around Wrocław and in key logistics locations including Bielany Wrocławskie, Kąty Wrocławskie, Nowa Wieś Wrocławska, Polkowice and Pietrzykowice.

On an annual basis, warehouse stock remained broadly unchanged. Between January and March 2026, developers did not complete any new warehouse schemes.

At the end of March 2026, more than 110,000 sq m of modern warehouse space was however under construction, comprising two buildings within Panattoni Wrocław Campus 2, scheduled for completion in Q2 and Q3 2026. Although the development pipeline was more than four times larger than a year earlier, it remained relatively modest compared with Poland's largest regional warehouse markets.

No new warehouse developments were launched in the Wrocław region during Q1 2026. In addition, approximately 90% of the space under construction had already been secured through pre-let agreements, highlighting developers' cautious approach towards speculative development.

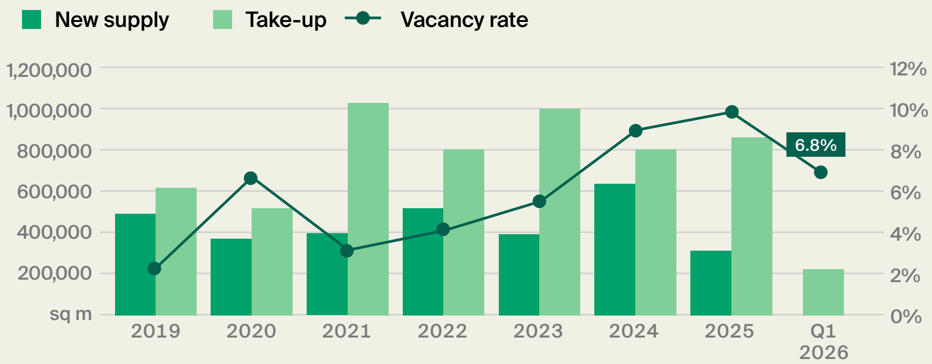
Total leasing activity in the Wrocław region reached approximately 210,000 sq m during Q1 2026, representing a significant increase in occupier take-up (up 110% year-on-year and 16% quarter-on-quarter). The largest transactions completed during the quarter included a 67,500 sq m new lease at Marq Wrocław V Logistics Centre, a 36,100 sq m expansion at P3 Wrocław II, and an 18,400 sq m lease renewal at Panattoni Park Wrocław II.

New leases remained the primary driver of demand, accounting for 63% of total take-up. Expansions represented 23%, while lease renewals accounted for the remaining 14%.

At the end of Q1 2026, the vacancy rate in Lower Silesia stood at 6.8%, marking a substantial 4.4 pp. y/y decline. The reduction in available space was primarily attributable to limited speculative completions combined with stronger occupier activity.

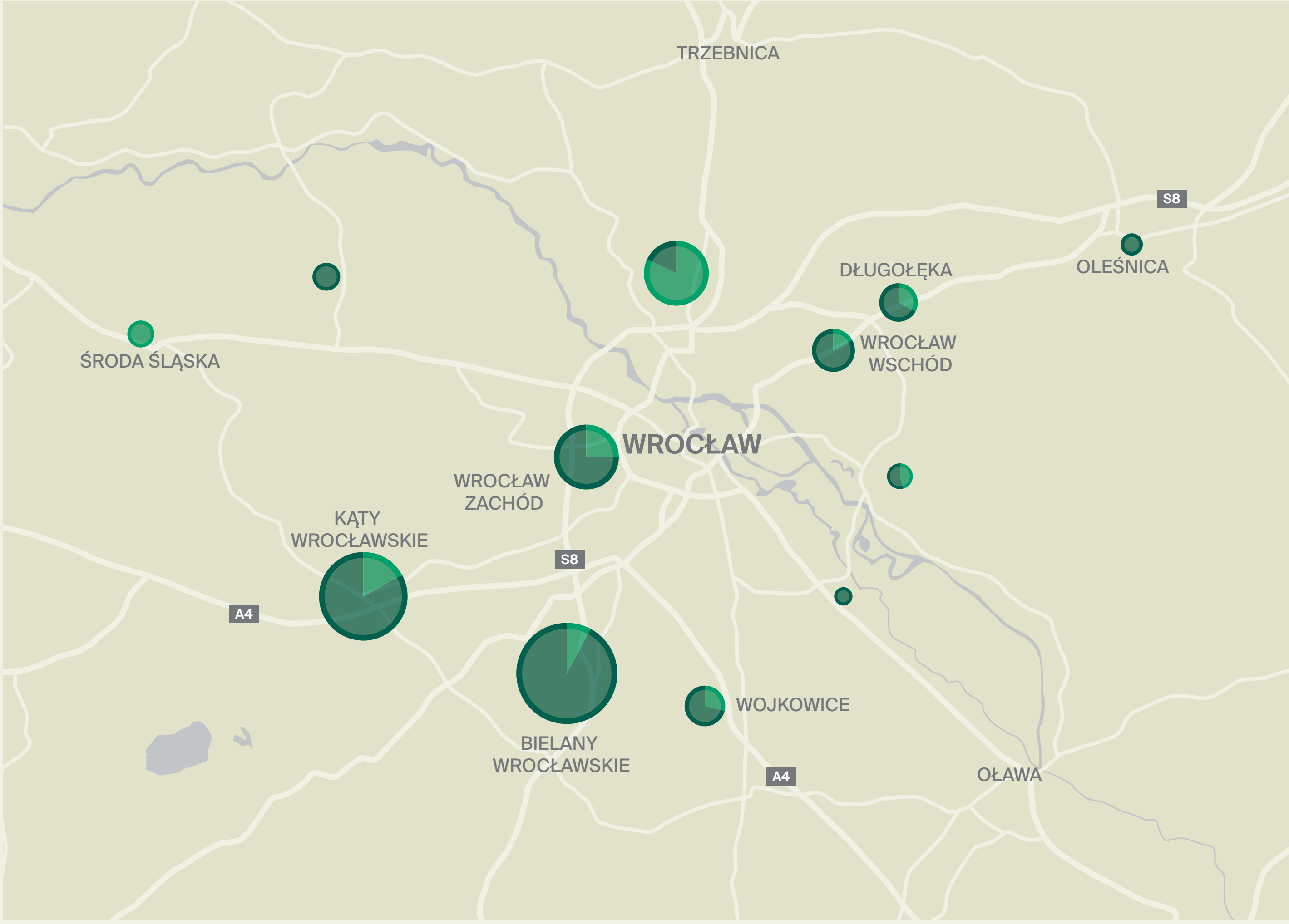
Asking rents across the Lower Silesia industrial and logistics market remained stable compared with the previous quarter, reflecting the continued balance between supply and take-up.

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
(03.2026, STATISTICS POLAND)

Unemployment rate
5.8%

Average monthly salary
(enterprise sector)
PLN **9,740** (gross)

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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