Warehouse market

H1 2025

The comprehensive guide to the warehouse market in Upper Silesia

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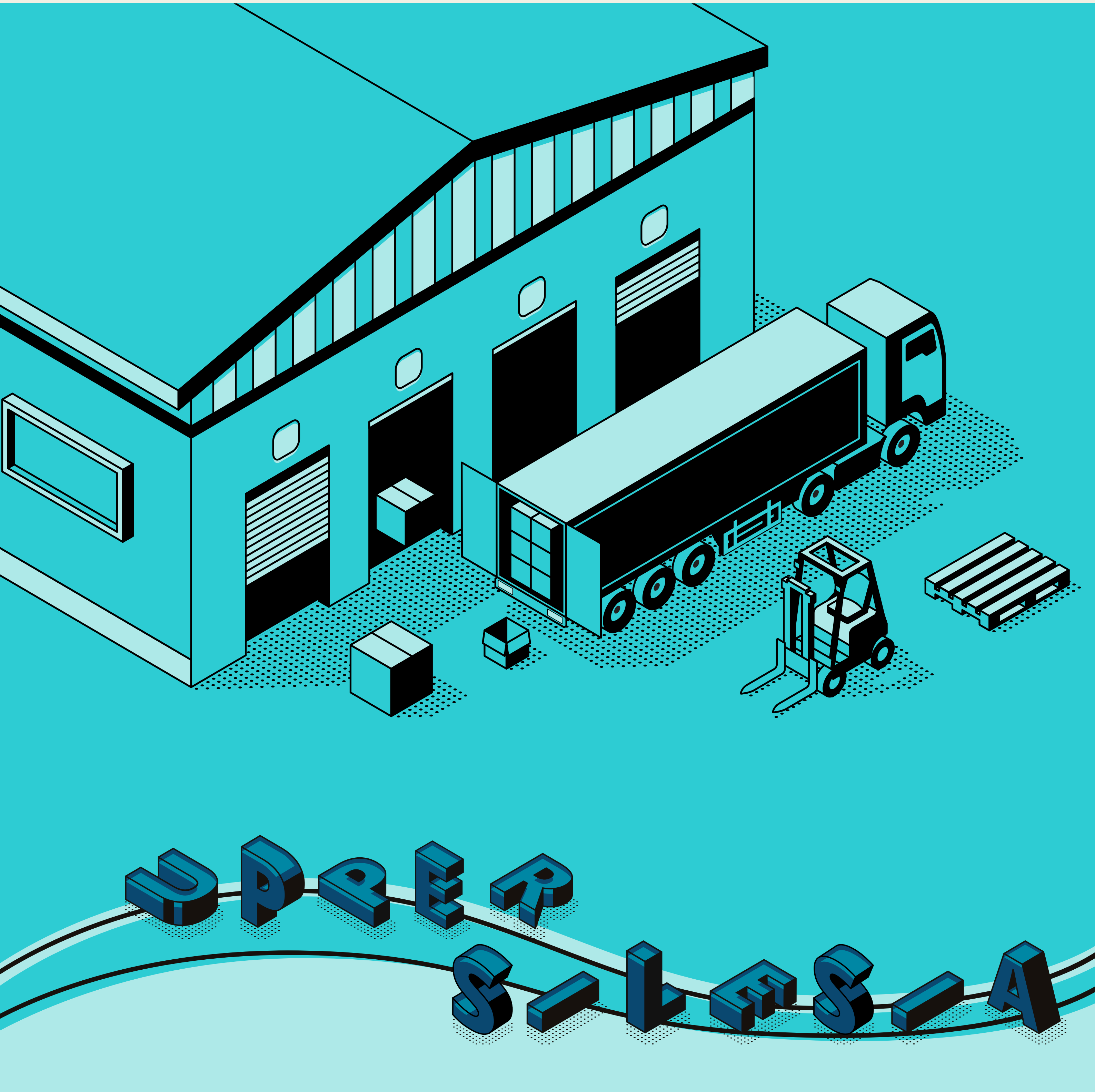


WAREHOUSE MARKET

Upper Silesia

H1 2025

Existing warehouse stock
6.1m sq m

Supply under construction
200,000 sq m

Vacancy rate
7.0%

New supply
(H1 2025)
255,000 sq m

Take-up
(H1 2025)
530,000 sq m

Standard lease terms in warehouse buildings

Asking rents for warehouse space
EUR/sq m/month
4.00-6.00

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 Upper Silesia region is the second-largest warehouse market in Poland after Warsaw. Key factors supporting the region's development include its proximity to the borders with Germany, the Czech Republic, and Slovakia, excellent transport infrastructure, a large consumer market and labor pool, as well as the industrial character of the area. As a result, Upper Silesia is one of the most important warehouse hubs not only in Poland but also in Central Europe.

At the end of Q2 2025, the warehouse stock in the Upper Silesia region was estimated at over 6.1m sq m, accounting for 17.1% of Poland's total supply. The market is concentrated around cities such as Będzin, Chorzów, Czeladź, Tychy, Dąbrowa Górnicza, Gliwice, Sosnowiec, as well as Bielsko-Biała and the surrounding smaller towns.

Over the past year, the region's total warehouse stock increased by nearly 10%. Between January and June 2025, developers delivered over 255,000 sq m of modern warehouse space, representing a growth of nearly 64% compared to the same period in the previous year. The largest completions in Q2 2025 included Panattoni Park Sosnowiec Expo (47,700 sq m), a project in Booster Zabrze by LemonTree (38,700 sq m), and GLP Lędziny II (20,400 sq m).

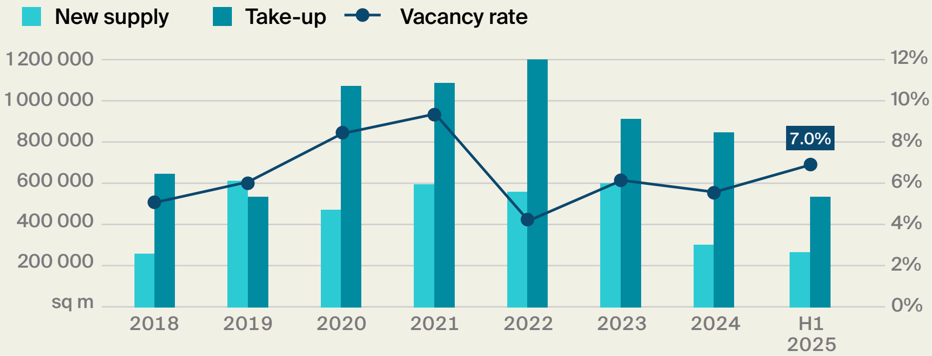
At the end of June 2025, approximately 200,000 sq m of modern warehouse space was under construction in Upper Silesia. The largest ongoing project remained a four-building complex within Booster Zabrze by LemonTree, with a total area of 69,900 sq m. The volume of space under construction decreased both compared to the previous quarter and the same period in 2024. In Q2 2025, construction began on 69,000 sq m across four buildings. However, developers are showing increased optimism, as only 30% of the space currently under construction is secured by pre-lease agreements — a clear sign of positive market sentiment.

Take-up for warehouse space in Upper Silesia remains strong. In H1 2025, nearly 530,000 sq m of space was leased, an increase of almost 14% year-on-year. In Q2 2025 alone, take-up reached over 306,000 sq m, marking a 34% increase compared to the first quarter. The largest transactions recorded in Q2 included: a new lease at 7R Park Beskid III (20,900 sq m), a lease extension at Tenneco Stanowice (18,800 sq m), and a renewal at Panattoni Park Sosnowiec II (15,500 sq m). Renewals accounted for 81% of total leased volume, while new leases made up 15% and expansions 4%.

Despite continued strong take-up, Upper Silesia recorded a rise in the vacancy rate, which reached 7% at the end of Q2 2025 — up 1.1 pp year-on-year. The increase was mainly driven by the significant volume of new space delivered during the period.

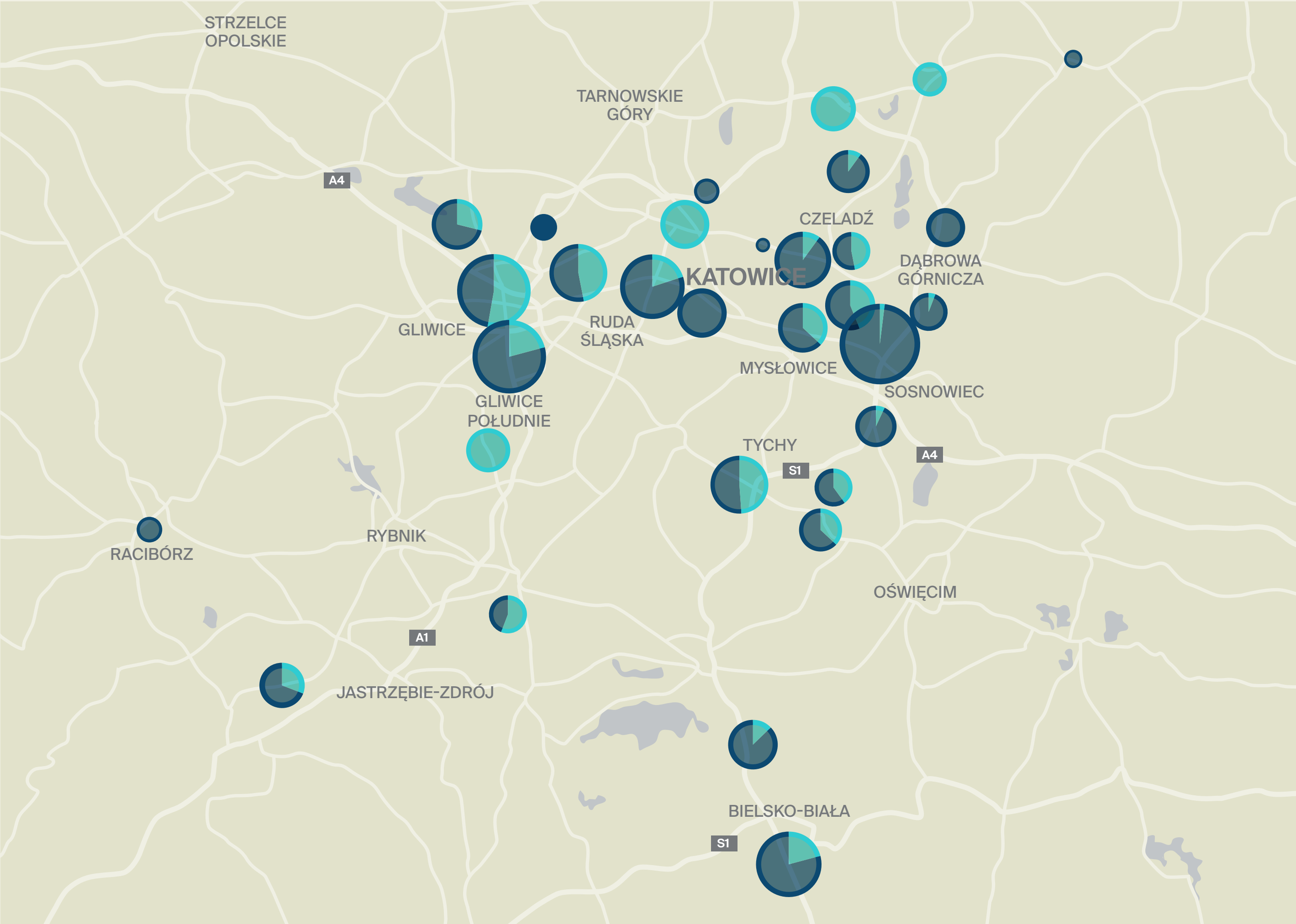
In Q2 2025, asking rents in the warehouse sector in Upper Silesia remained stable compared to the previous quarter.

New warehouse supply, annual take-up, vacancy rate in Upper 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. **Sosnowiec South** 650,000 sq m
2. **Gliwice South** 470,000 sq m
3. **Ruda Śląska** 430,000 sq m
4. **Zabrze** 340,000 sq m
5. **Gliwice** 320,000 sq m

Śląskie Voivodeship

Population
4.3m

Voivodeship area
12,334 sq km

ECONOMIC DATA
(06.2025, STATISTICS POLAND)

Unemployment rate
3.8%

Average monthly salary
(enterprise sector)
PLN **8,980** (gross)

Average monthly salary
(transportation and storage sector)
PLN **8,750** (gross)

HIGH-SPEED ROADS

Highways
250 km
A1, A4

Expressways
130 km
S1, S52, S86

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