Warehouse market

Q1 2025

The comprehensive guide to the warehouse market in Upper Silesia

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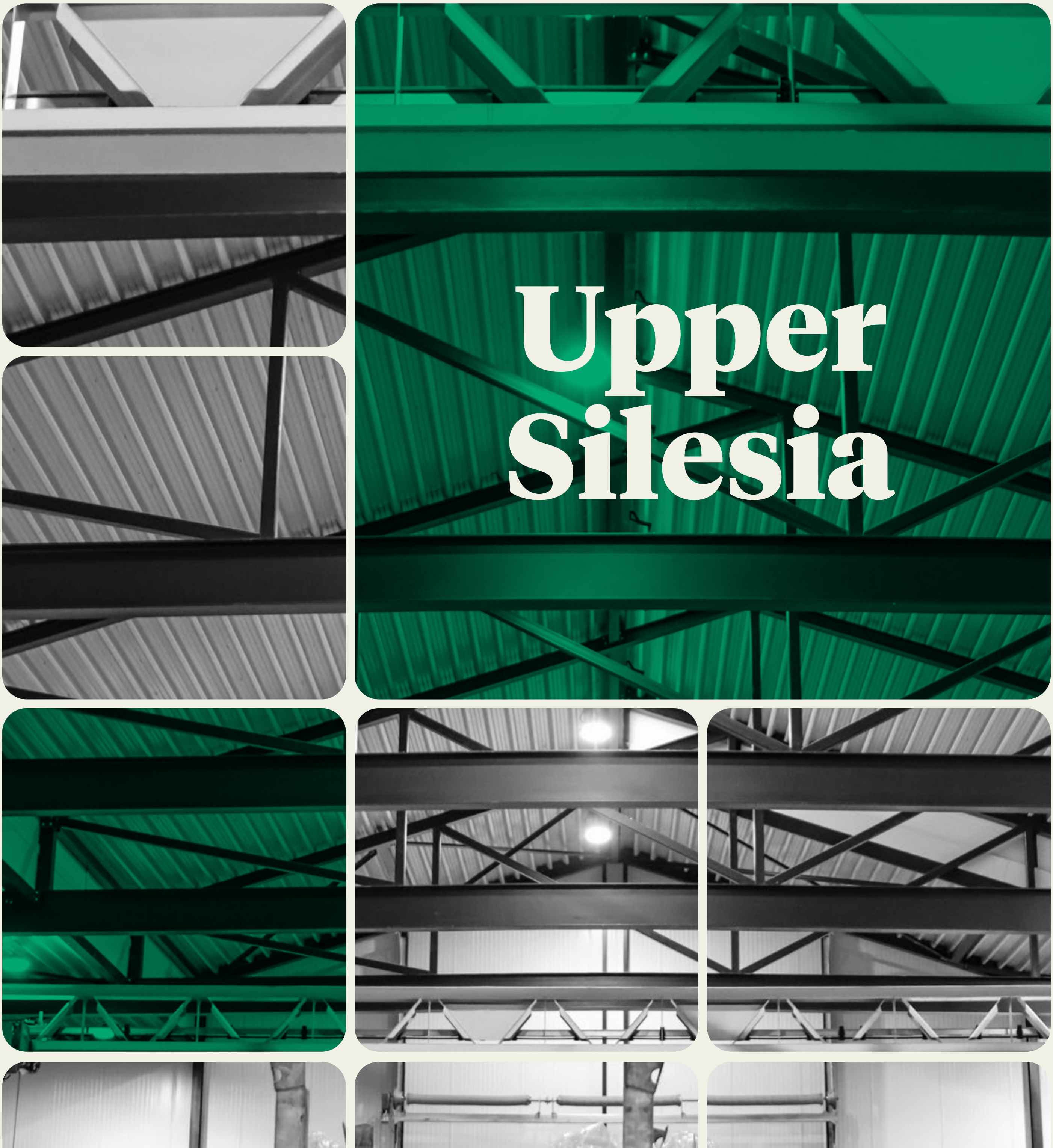


Upper Silesia

Upper Silesia

Q1 2025

Existing warehouse stock
5.9m sq m

Supply under construction
270,000 sq m

Vacancy rate
6.8%

New supply
(Q1 2025)
120,000 sq m

Take-up
(Q1 2025)
230,000 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. The attractiveness of Upper Silesia stems from its good road and rail infrastructure, high availability of workers, and developed consumer market. The region offers attractive investment opportunities and a strong industrial base, with its proximity to the Czech and Slovak borders reinforcing its role as a key logistics hub in Poland and Central Europe. Warehouse space in the region is concentrated around cities such as Będzin, Chorzów, Czeladź, Tychy, Dąbrowa Górnicza, Gliwice, Sosnowiec, and Bielsko-Biała, along with the smaller towns surrounding them. By the end of Q1 2025, the region's warehouse stock exceeded 5.9 million sq m, representing 16.6% of the national total. During the year, total warehouse space increased by over 6%.

In the Q1 2025, nearly 120,000 sq m of modern space was delivered to the market, which represented a significant increase compared to both the previous quarter and the same period of the previous year but continued to be close to the average for the last five years. The largest projects commissioned were the halls at Prologis Park Ruda Śląska (37,600 sq m), Panattoni Park Będzin (27,600 sq m) and Fortress Logistic Park Zabrze (22,700 sq m).

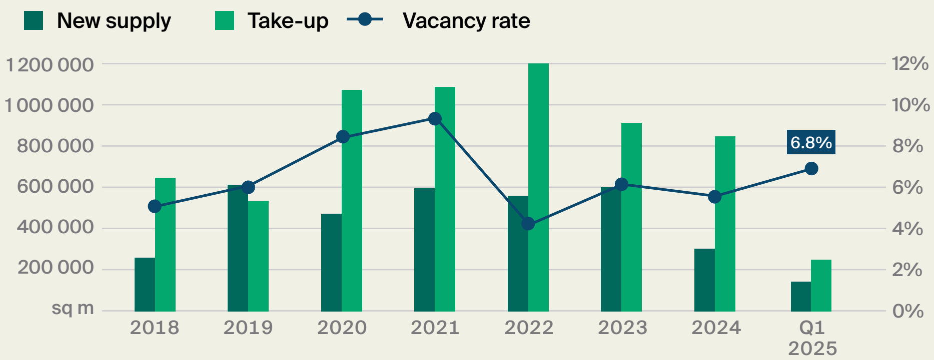
At the end of March 2025, 270,000 sq m of warehouse space remained under construction, the largest part of which was a complex of five warehouses in the Booster Zabrze by LemonTree project with a total area of 108,000 sq m. Compared to Q1 2024, the supply under construction increased by nearly 23%, but no new developments were launched in the analysed period. The supply under construction was secured by pre-lease agreements at 53%, which shows developers' caution towards speculative projects.

The amount of space leased in the first quarter of 2025 was approximately 230,000 sq m, which represents a decrease of over 11% compared to the previous quarter, but an increase of 4% compared to the same period in 2024. The largest contracts were the renewal of the lease at Prologis Park Chorzów (56,000 sq m) and the renewal of the contract at Prologis Park Dąbrowa (22,400 sq m), as well as the renewal and expansion at Panattoni Park Ruda Śląska (16,700 sq m and an additional 5,700 sq m). The take-up structure was dominated by renewals, which accounted for 69%, with new contracts accounting for 27% and expansions for 4%.

The vacancy rate at the end of Q1 2025 was 6.8%, an increase of 0.4 pp. compared to the previous year. This rise was primarily due to the delivery of a large amount of new supply to the market, which has not been fully commercialised.

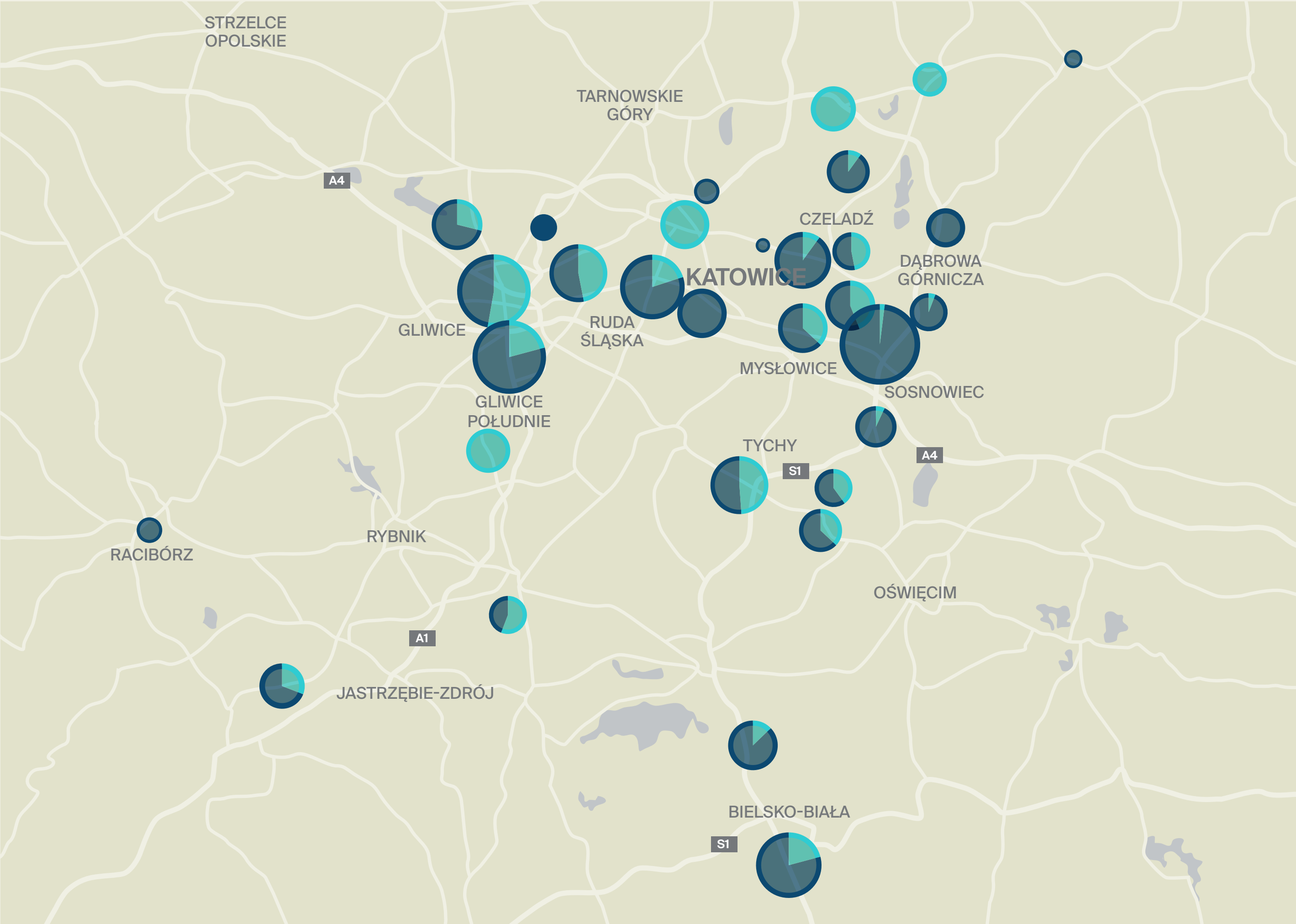
Asking rents in the region remained stable compared to the previous quarter.

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. Czeladź
310,000 sq m

5. Gliwice
300,000 sq m

Śląskie Voivodeship

Population
4.3m

Voivodeship area
12,334 sq km

ECONOMIC DATA
(03.2025, STATISTICS POLAND)

Unemployment rate
3.9%

Average monthly salary
(enterprise sector)
PLN **8,829** (gross)

Average monthly salary
(transportation and storage sector)
PLN **8,597** (gross)

HIGH-SPEED ROADS

Highways
250 km
A1, A4

Expressways
130 km
S1, S52, S86

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