Warehouse market

Q1 2026	The comprehensive guide to the warehouse market in Upper Silesia	knightfrank.com.pl/en/research

UPPER SILESIA

Upper Silesia

Q1 2026

Existing warehouse stock
6.3m sq m

New supply
(Q1 2026)
100,000 sq m

Supply under construction
215,000 sq m

Take-up
(Q1 2026)
180,000 sq m

Vacancy rate
8.4%

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
per each year of lease term
1-1.5 month

Upper Silesia remains Poland's second-largest industrial and logistics market after Warsaw. The region's strong market position is underpinned by its well-developed transport infrastructure, favourable conditions for manufacturing and distribution operations, and strategic location providing efficient access to neighbouring markets, including the Czech Republic, Germany, and Slovakia. These factors continue to reinforce Upper Silesia's role as one of the key logistics hubs in both Poland and Central Europe. At the end of Q1 2026, the region's modern warehouse stock exceeded 6.3m sq m, accounting for 16.8% of Poland's total industrial and logistics supply. Warehouse activity remains concentrated around Będzin, Chorzów, Czeladź, Tychy, Dąbrowa Górnicza, Gliwice, Sosnowiec and Bielsko-Biała.

On an annual basis, warehouse stock in Upper Silesia expanded by more than 7%. Between January and March 2026, developers delivered over 100,000 sq m of modern warehouse space. This represented a decline of nearly 13% year-on-year, while increasing more than fivefold compared with the previous quarter. The largest completions included a 36,200 sq m facility at EQT Exeter Gliwice, a 33,800 sq m building at Panattoni Park Sosnowiec V, and two warehouses at CTPark Zabrze totalling 20,000 sq m and 3,100 sq m, respectively.

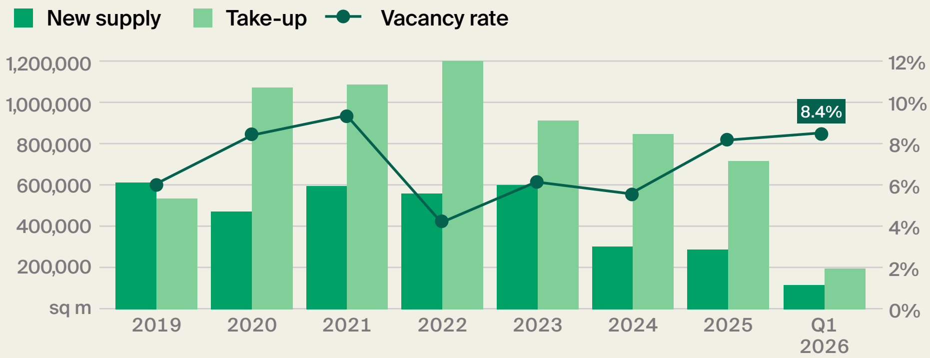
At the end of March 2026, approximately 220,000 sq m of warehouse space remained under construction, representing a 20% decrease compared with the same period of the previous year. The largest development underway was Booster Zabrze by LemonTree, comprising three buildings with a combined area of approximately 58,000 sq m. During Q1 2026, the largest project launched was a 40,000 sq m warehouse at Panattoni Park Katowice Airport, located adjacent to Katowice Airport. As of the end of Q1 2026, approximately 35% of the space under construction had been secured through pre-let agreements. The relatively low pre-let ratio reflects developers' confidence in the market's growth prospects and their willingness to pursue speculative development.

Between January and March 2026, total leasing activity in Upper Silesia reached nearly 180,000 sq m, down by more than 20% year-on-year. The largest transactions recorded during the quarter included a 28,000 sq m new lease at EQT Exeter Gliwice, a 21,600 sq m lease renewal at Segro Logistics Park Gliwice, and a 19,900 sq m new lease at Park Ruda Śląska. New leases remained the dominant component of occupier activity, accounting for 58% of total take-up. Lease renewals represented 25%, while expansions made up the remaining 17%.

At the end of Q1 2026, the vacancy rate in Upper Silesia stood at 8.4%, an increase of 1.6 pp. y/y. The higher level of available space was primarily driven by softer occupier demand alongside the continued delivery of new supply.

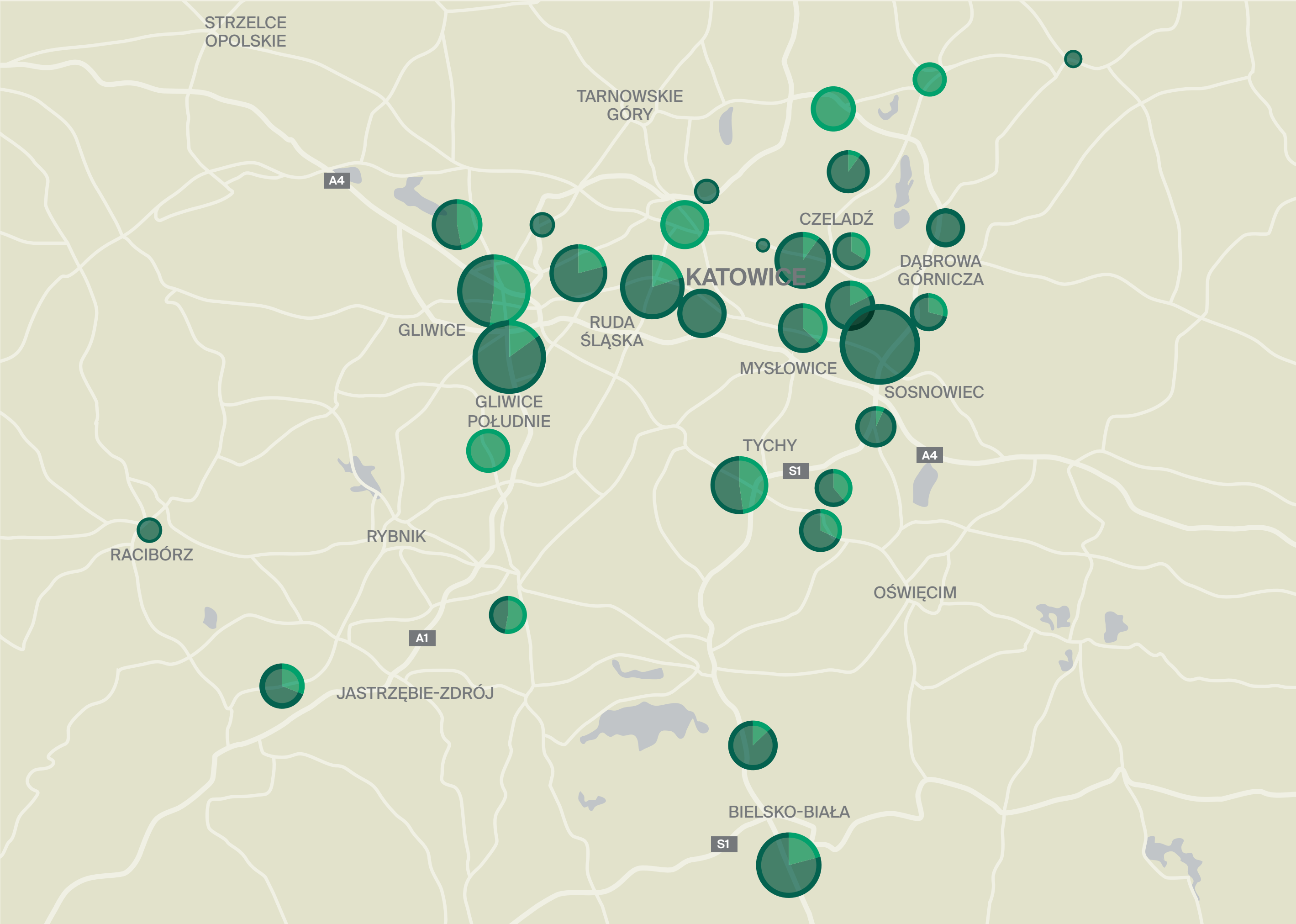
Asking rents across the Upper Silesia warehouse market remained broadly stable compared with the previous quarter.

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
510,000 sq m

3. Ruda Śląska
430,000 sq m

4. Zabrze
390,000 sq m

5. Gliwice
320,000 sq m

Śląskie Voivodeship

Population
4.3m

Voivodeship area
12,334 sq km

ECONOMIC DATA
(03.2026, STATISTICS POLAND)

Unemployment rate
4.9%

Average monthly salary
(enterprise sector)
PLN **9,400** (gross)

Average monthly salary
(transportation and storage sector)
PLN **9,200** (gross)

HIGH-SPEED ROADS

Highways
250 km
A1, A4

Expressways
130 km
S1, S52, S86

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