

# Warehouse market



Q3 2025

The comprehensive guide to the warehouse market in Upper Silesia

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U P P E R  
S I L E S I A

# Upper Silesia

Q3 2025

- ▶  Existing warehouse stock **6.2m sq m**
- ▶  Supply under construction **190,000 sq m**
- ▶  Vacancy rate **7.5%**
- ▶  New supply (Q1-Q3 2025) **280,000 sq m**
- ▶  Take-up (Q1-Q3 2025) **700,000 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**

Upper Silesia remains one of the most important and strategically positioned logistics hubs in Poland and Central Europe. As the country's second-largest warehouse and logistics market, the region offers over 6.2 million sq m of space, representing 17% of Poland's total stock. Upper Silesia has long attracted occupiers due to its well-developed transport infrastructure, including direct access to the A1 and A4 motorways, and its proximity to three key international markets: the Czech Republic, Germany, and Slovakia. These strong international connections make the region a highly sought-after location for manufacturing, logistics, and distribution operations.

Warehouse stock in Upper Silesia continues to expand. Between January and the end of September 2025, developers delivered over 280,000 sq m of new modern space, marking a 6% year-on-year increase. However, Q3 2025 saw a clear slowdown in new supply, with only 20,000 sq m completed across three facilities: one building at Booster Zabrze by LemonTree (11,100 sq m) and two halls at Multipark Sosnowiec (4,900 sq m and 3,600 sq m).

Construction activity also moderated, with 190,000 sq m of warehouse space under development as of the end of September 2025, down 35% compared with the previous year. The largest projects currently under construction include three buildings at Booster Zabrze by LemonTree (41,000 sq m, 9,000 sq m and 8,700 sq m) and two halls at Panattoni Park Sosnowiec V (33,800 sq m and 10,800 sq m). In Q3, only one new project was launched, also within Panattoni Park Sosnowiec V.

At the same time, only 30% of the space currently under construction has been secured through pre-let agreements. The high proportion of speculative developments reflects positive market sentiment and optimistic expectations for future occupier demand.

Leasing activity remained robust during the first three quarters of 2025, with approximately 700,000 sq m of space leased, reflecting a notable 21% year-on-year increase. The largest transactions were predominantly lease renewals, including 25,800 sq m at Segro Business Park Gliwice, 20,800 sq m at Prologis Park Dąbrowa, and 12,200 sq m at Diamond Business Park Gliwice II. In total, lease renewals accounted for 70% of overall take-up in Q1-Q3 2025, while new leases represented 29% and expansions constituted a mere 1%.

Despite the growth in take-up, the vacancy rate edged up slightly, driven by the concentration of tenant activity on renewals and the delivery of a relatively high volume of new supply. At the end of Q3 2025, the vacancy rate stood at 7.5%, up by 0.5 pp quarter-on-quarter.

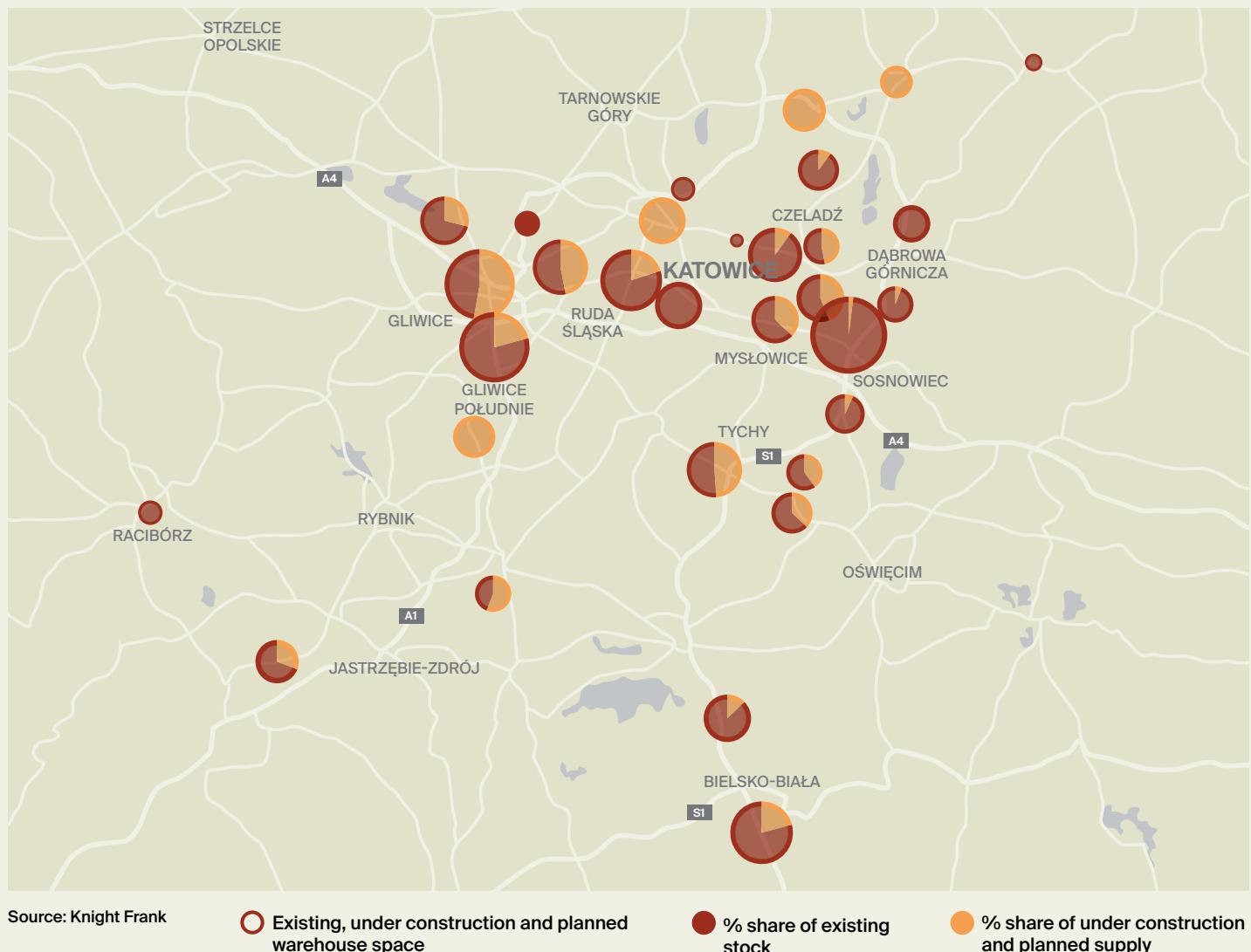
Asking rents remained stable, ranging between EUR 4.0 and 6.0/sq m/month. The upper end of the rental spectrum, among the highest in Poland, underscores the region's strong attractiveness and competitiveness for both occupiers and investors.

## New warehouse supply, annual take-up, vacancy rate in Upper Silesia



Source: Knight Frank

## Location of warehouse developments in the region



### 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 **350,000 sq m**
5. Gliwice **320,000 sq m**

### Śląskie Voivodeship



Population  
**4.3m**



Voivodeship area  
**12,334 sq km**

### ECONOMIC DATA (09.2025, STATISTICS POLAND)



Average monthly salary  
(enterprise sector)  
**PLN 8,700** (gross)



Unemployment rate  
**4.3%**



Average monthly salary  
(transportation and storage sector)  
**PLN 8,800** (gross)

### HIGH-SPEED ROADS



Highways  
**250 km**  
A1, A4



Expressways  
**130 km**  
S1, S52, S86

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