

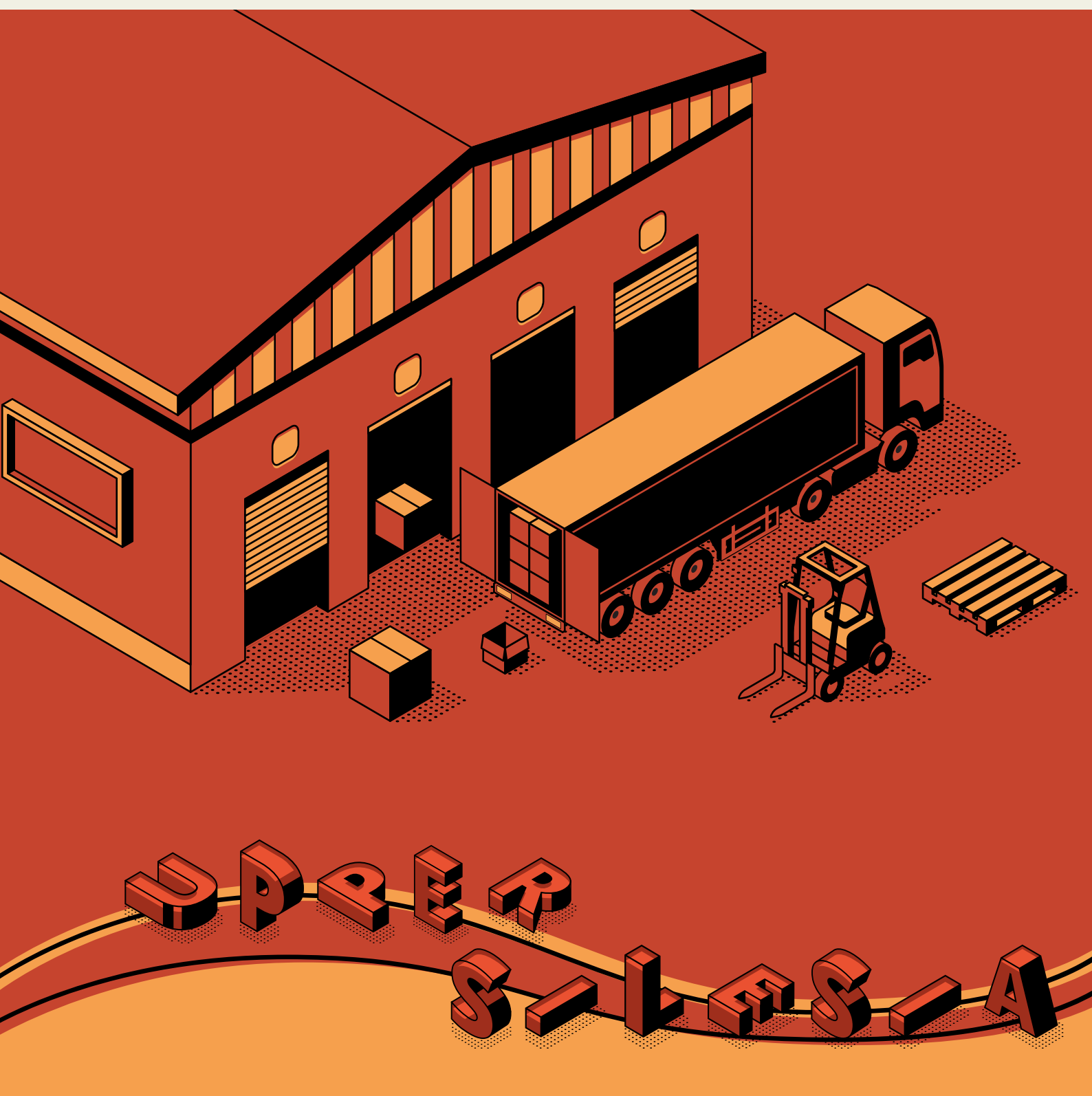
# Warehouse market



Q3 2025

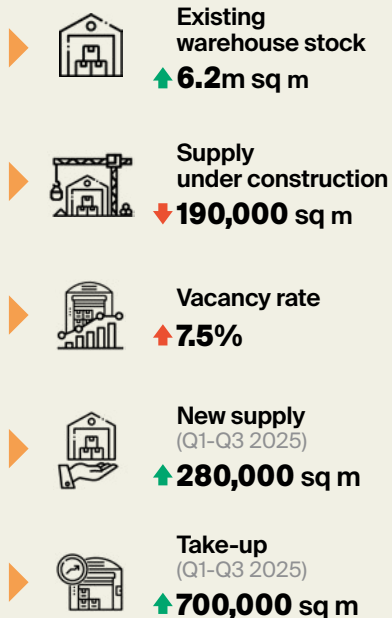
The comprehensive guide to the warehouse market in Upper Silesia

[knightfrank.com.pl/en/research](https://knightfrank.com.pl/en/research)

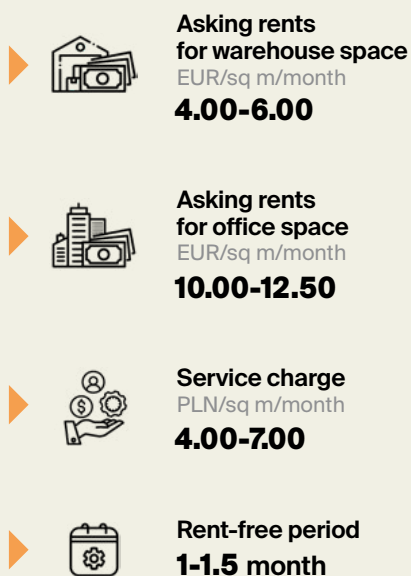


# Upper Silesia

## Q3 2025



## Standard lease terms in warehouse buildings



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.

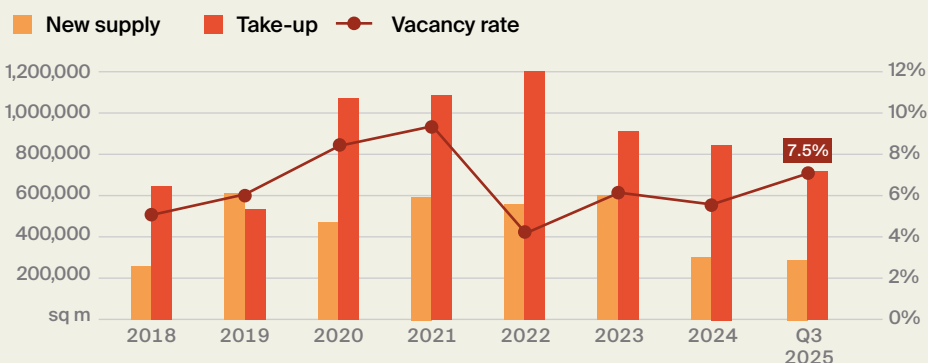
At the same time, only 30% of the space currently under construction has been secured through pre-let agreements. The high proportion of speculative developments reflects positive market sentiment and optimistic expectations for future occupier demand.

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.

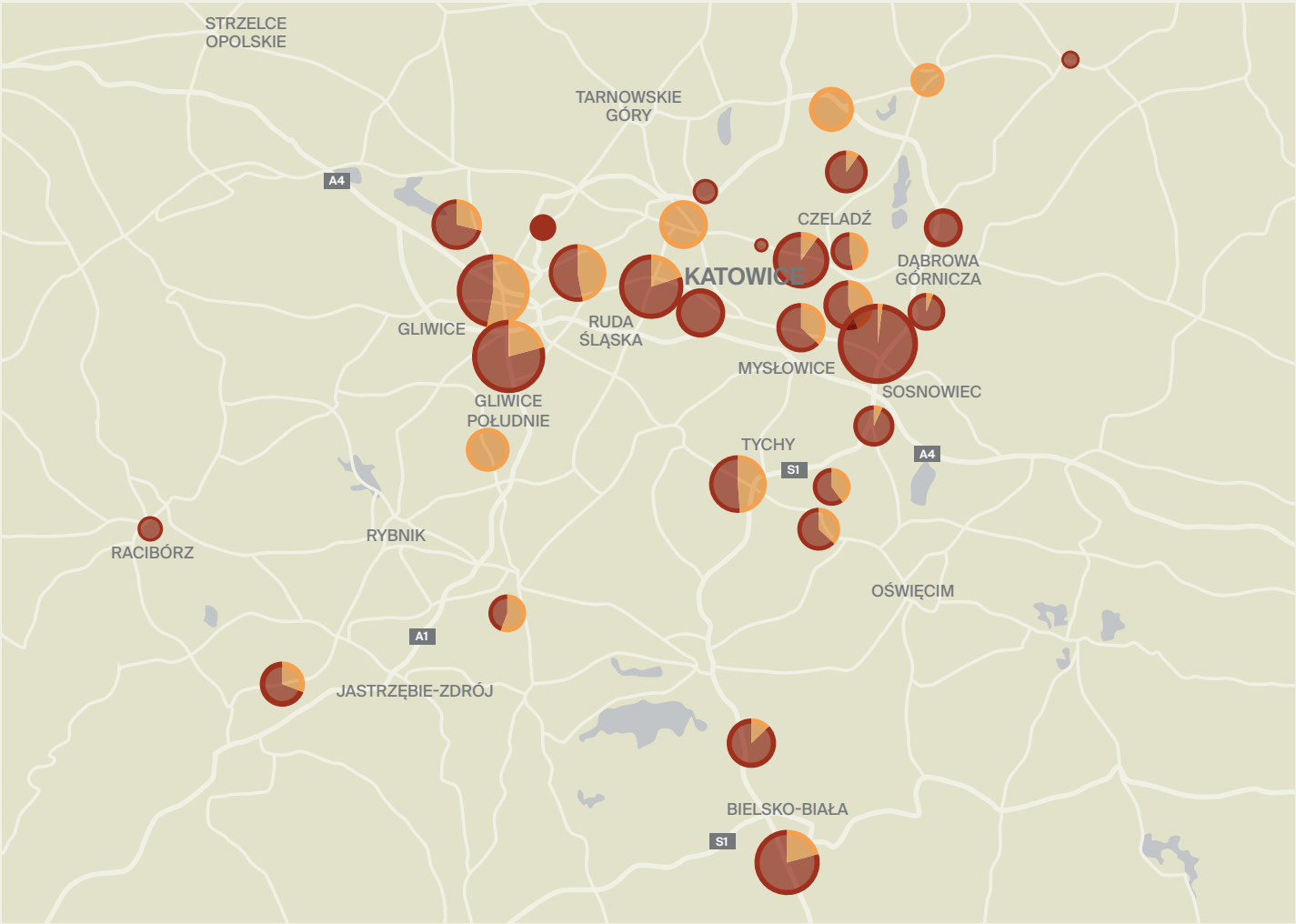
Asking rents remained stable, ranging between EUR 4.0 and 6.0/sq m/month. The upper end of the rental spectrum, among the highest in Poland, underscores the region's strong attractiveness and competitiveness for both occupiers and investors.

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



Source: Knight Frank

Location of warehouse developments in the region



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  
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)



Unemployment rate  
4.3%



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



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

**CONTACTS IN POLAND:**

+48 22 596 50 50  
[www.KnightFrank.com.pl](http://www.KnightFrank.com.pl)

**RESEARCH**

Dorota Lachowska  
[dorota.lachowska@pl.knightfrank.com](mailto:dorota.lachowska@pl.knightfrank.com)

**CAPITAL MARKETS**

Krzysztof Cipiur  
[krzysztof.cipiur@pl.knightfrank.com](mailto:krzysztof.cipiur@pl.knightfrank.com)

**INDUSTRIAL AGENCY**

Przemysław Piętaś  
[przemyslaw.pietak@pl.knightfrank.com](mailto:przemyslaw.pietak@pl.knightfrank.com)

**VALUATION & ADVISORY**

Małgorzata Krzystek  
[malgorzata.krzystek@pl.knightfrank.com](mailto:malgorzata.krzystek@pl.knightfrank.com)

As one of the largest and most experienced research teams operating across Polish commercial real estate markets, Knight Frank Poland provides strategic advice, forecasting and consultancy services to a wide range of commercial clients including developers, investment funds, financial and corporate institutions as well as private individuals. We offer:

- ◆ strategic consulting, independent forecasts and analysis adapted to clients' specific requirements,
- ◆ market reports and analysis available to the public,
- ◆ tailored presentations and market reports for clients.

Reports are produced on a quarterly basis and cover all sectors of commercial market (office, retail, industrial, hotel) in major Polish cities and regions (Warsaw, Kraków, Łódź, Poznań, Silesia, Tricity, Wrocław, Lublin, Szczecin) and PRS sector in Poland. Long-term presence in major local markets has allowed our research team to build in-depth expertise of socio-economic factors affecting real estate market in Poland.

Knight Frank Research  
Reports are available at



© Knight Frank Sp. z o.o. 2025

This report is published for general information only and not to be relied upon in any way. Although high standards have been used in the preparation of the information, analysis, views and projections presented in this report, no responsibility or liability whatsoever can be accepted by Knight Frank for any loss or damage resultant from any use of, reliance on or reference to the contents of this document. As a general report, this material does not necessarily represent the view of Knight Frank in relation to particular properties or projects. Reproduction of this report in whole or in part is not allowed without prior written approval of Knight Frank to the form and content within which it appears

Substantive preparation: Szymon Sobiecki / Research / Knight Frank

Graphic design: Karolina Chodak-Brzozowska / Art Director / PR & Marketing / Knight Frank