Warehouse market

Knight Frank

Q4 2025

The comprehensive guide to the warehouse market in Upper Silesia

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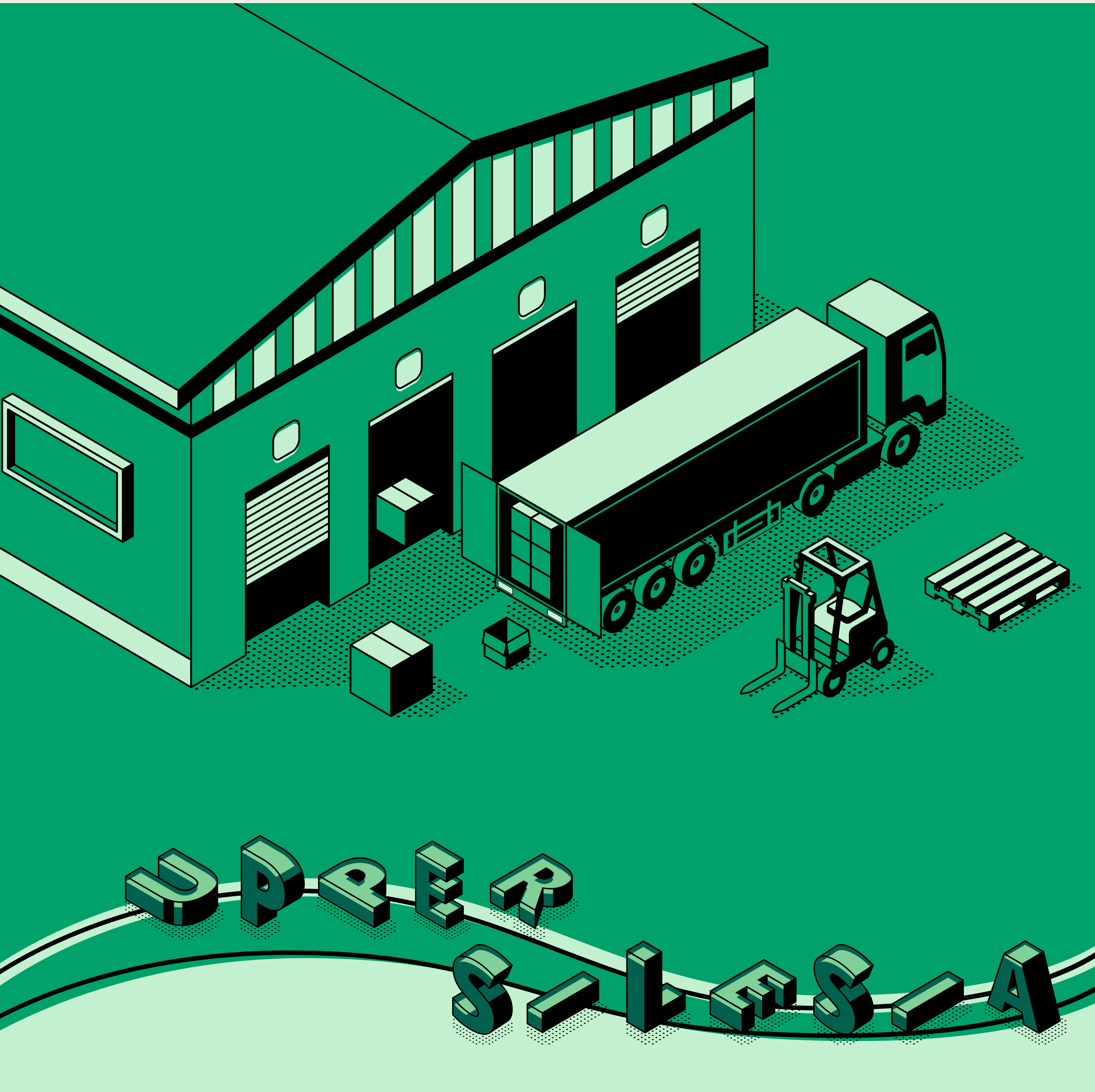


WAREHOUSE MARKET

Upper Silesia

Q4 2025

Existing warehouse stock
6.2m sq m

New supply
(2025)
290,000 sq m

Supply under construction
190,000 sq m

Take-up
(2025)
1.07m sq m

Vacancy rate
8.2%

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 remains the second-largest warehouse market in Poland, after Warsaw. Its attractiveness for manufacturing and distribution companies stems from a well-developed road infrastructure and convenient transport connections with Czechia, Germany and Slovakia, strengthening the region's position as one of the key logistics hubs in Poland and Central Europe. At the end of Q4 2025, the region's modern warehouse stock exceeded 6.2m sq m, representing 16.9% of the country's total supply. Warehouse activity is concentrated within the cities of the metropolitan area, including Będzin, Chorzów, Czeladź, Tychy, Dąbrowa Górnicza, Gliwice, Sosnowiec and Bielsko-Biała, as well as in neighbouring smaller towns.

Warehouse stock in Upper Silesia continues to grow; however, since 2024 the pace of expansion has significantly slowed. In 2025, more than 290,000 sq m of warehouse space was delivered, representing a comparable level to the new supply completed a year earlier, but remaining significantly below the five-year average of 465,000 sq m. The largest facilities completed in 2025 included Panattoni Park Sosnowiec Expo with 47,700 sq m, a building within Booster Zabrze by LemonTree (38,700 sq m), and a warehouse at Prologis Park Ruda Śląska (37,600 sq m).

Development activity continues to decline. At the end of December 2025, approximately 190,000 sq m of modern warehouse space was under construction, representing a 50% decrease compared with the previous year. In Q4 2025, only 19,700 sq m of logistics space commenced construction within a single project - GLP Gliwice II Logistics Centre - while the largest development under construction remained a complex of three warehouse buildings within Booster Zabrze by LemonTree with a total area of 58,700 sq m.

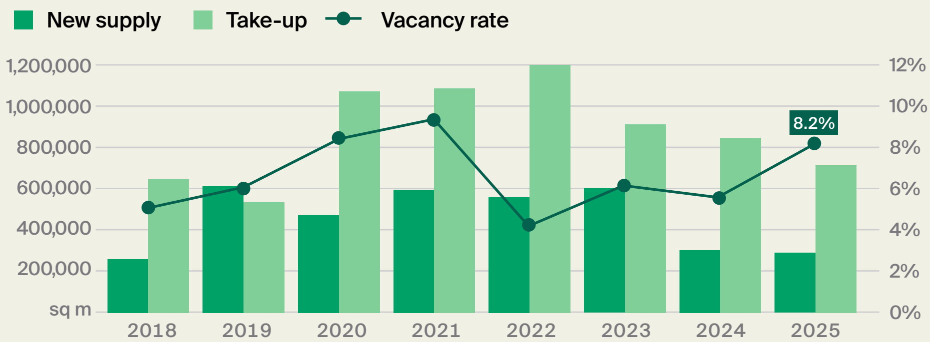
At the end of the fourth quarter, only 35% of the space under construction had been secured with lease agreements, which is significantly below the national average of approximately 60%.

In 2025, total leasing activity in Upper Silesia reached nearly 1.07m sq m, recording an increase of almost 30% compared with 2024. The largest agreements signed during the year included a lease renewal at Prologis Park Chorzów (55,900 sq m), a renewal at Hillwood Sosnowiec Zagłębie 1 (40,500 sq m), and a new lease at Panattoni Park Katowice Airport (40,000 sq m).

The vacancy rate in Upper Silesia at the end of Q4 2025 stood at approximately 8.2%. Despite the limited volume of new supply, the vacancy rate increased by 2.3 pp compared with the level recorded 12 months earlier. Despite the high level of demand, tenant activity was mainly focused on renegotiations and renewals of existing agreements.

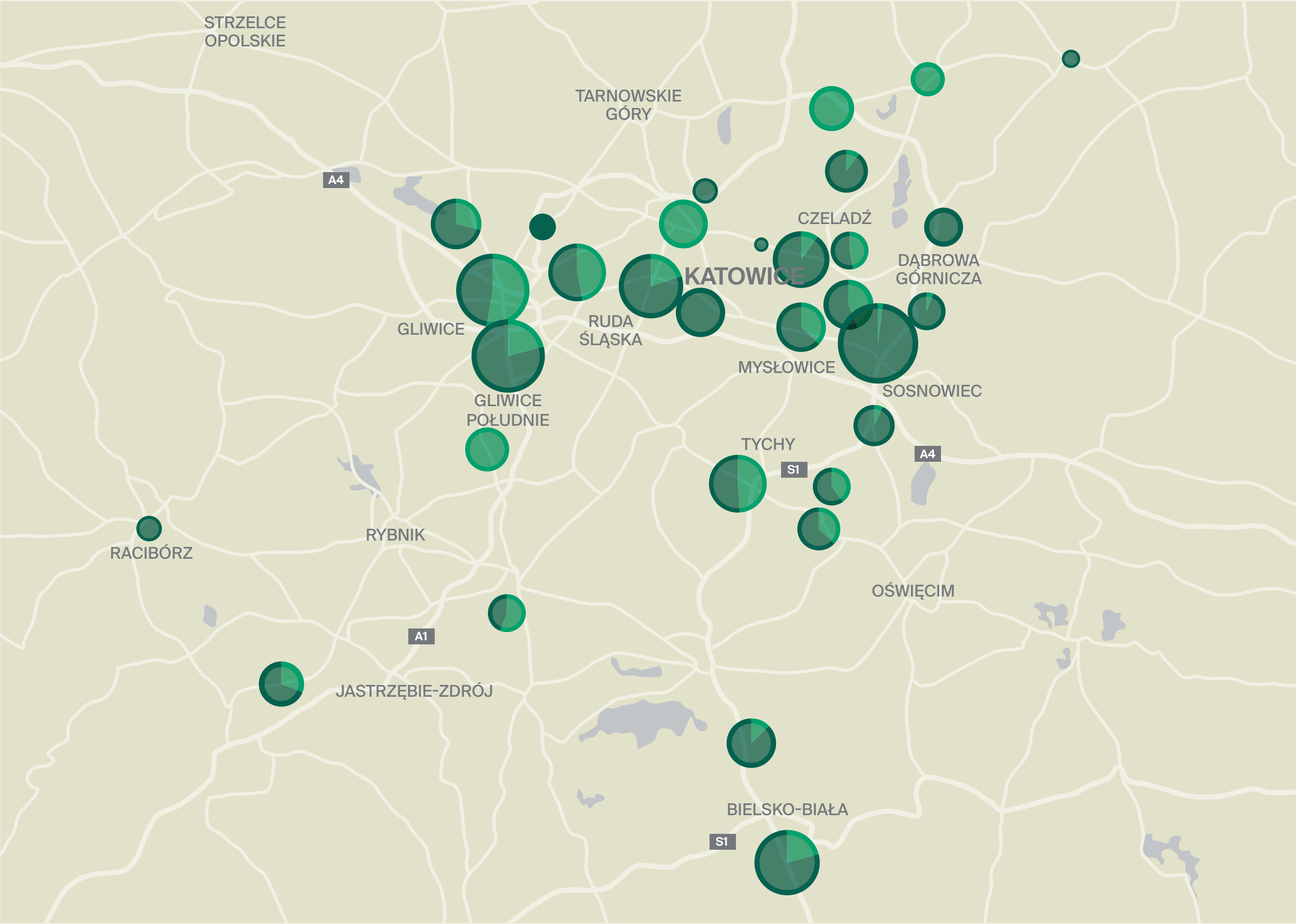
In Q4 2025, asking rents in the warehouse sector in the Upper Silesia region remained stable compared with the previous quarter and ranged between EUR 4.00 and 6.00 per sq m per month.

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
(12.2025, 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

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