Warehouse market

H1 2025

The comprehensive guide to the warehouse market in Central Poland

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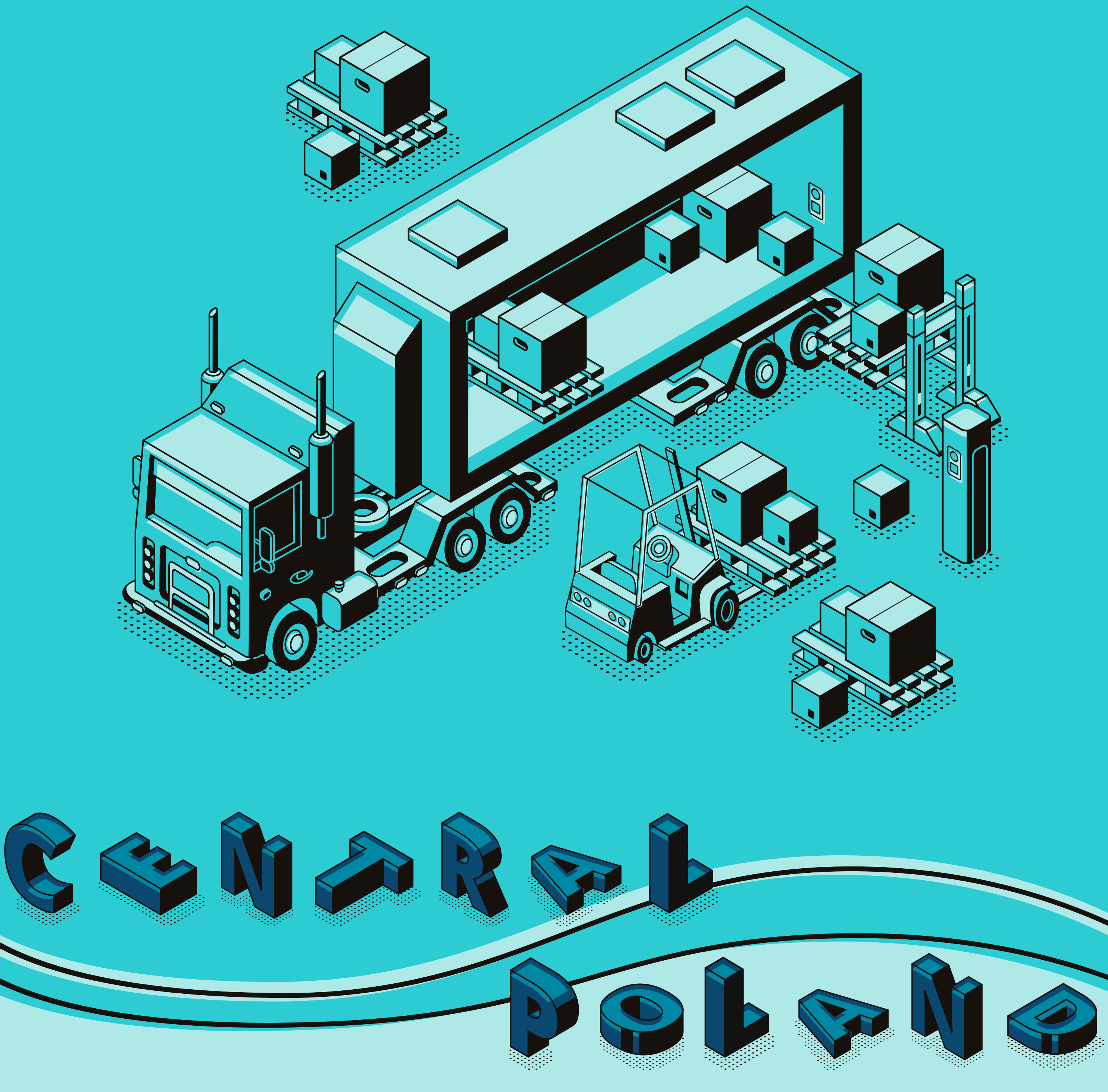


Central Poland

H1 2025

Existing warehouse stock
5.0m sq m

Supply under construction
170,000 sq m

Vacancy rate
9.1%

New supply
(H1 2025)
70,000 sq m

Take-up
(H1 2025)
370,000 sq m

Standard lease terms in warehouse buildings

Asking rents for warehouse space
EUR/sq m/month
3.80-4.50

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

Central Poland is one of the key warehouse markets in the country, ranking third in size after Warsaw and Upper Silesia. As of the end of Q2 2025, the region's warehouse stock reached 5m sq m, accounting for nearly 14% of the total warehouse space in Poland. Thanks to its central location, the region is particularly attractive to logistics operators and retail chains, which often establish their distribution centers and central warehouses here. The region's appeal was further strengthened by the launch of a rail connection between Łódź and Chengdu, China. Key warehouse hubs include Stryków, Łódź, and Piotrków Trybunalski, with Konin gaining increasing importance due to its location along the A1 motorway.

Warehouse stock in Central Poland has been growing steadily, although the growth rate has slowed in recent quarters. Over the past year, the region's supply increased by over 6%. From the beginning of 2025 to the end of June, developers delivered over 70,000 sq m, representing a decline of over 50% compared to the same period last year. In Q2 2025, only one project was completed — a warehouse within the P3 logistics park in Piotrków Trybunalski, with an area of nearly 24,000 sq m.

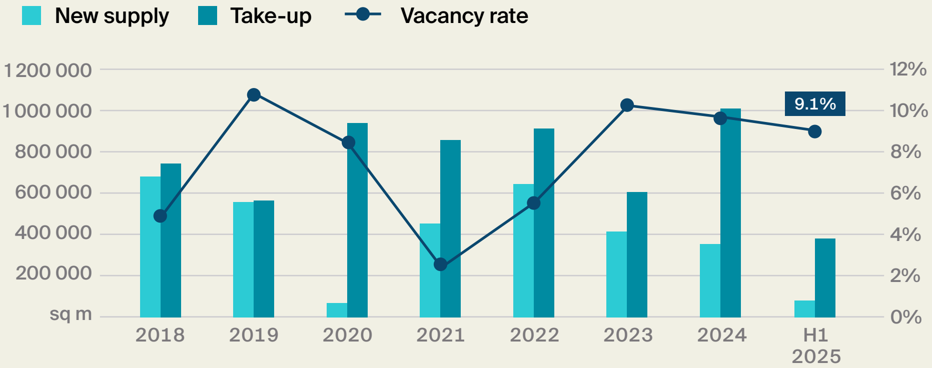
Developer activity remains limited — at the end of June 2025, over 170,000 sq m of modern warehouse space was under construction, which is nearly half the volume recorded in the previous quarter and the same period last year. Additionally, no new projects were launched in Q2 2025. The largest ongoing development remains Panattoni Park Zgierz II, comprising 68,900 sq m. Developers remain cautious regarding speculative construction, with nearly 70% of space under construction secured through pre-leases.

In H1 2025, over 370,000 sq m of warehouse space was leased in Central Poland, a 10% decrease compared to the same period in the previous year. However, most of the leasing activity occurred in the second quarter (almost 221,000 sq m), indicating a potential rebound in take-up. The largest transactions in Q2 2025 included: a lease renewal at Prologis Park Stryków (40,500 sq m), a new lease at Hillwood Łowicz South (30,500 sq m), and a new lease at Logistic City Piotrków Trybunalski (27,500 sq m). The demand structure was dominated by new leases (64%), followed by renewals (33%), and expansions (3%).

At the end of Q2 2025, the vacancy rate in Central Poland stood at 9.1%, reflecting a 1.7 pp decrease compared to 12 months earlier. This decline is primarily due to the limited volume of new supply.

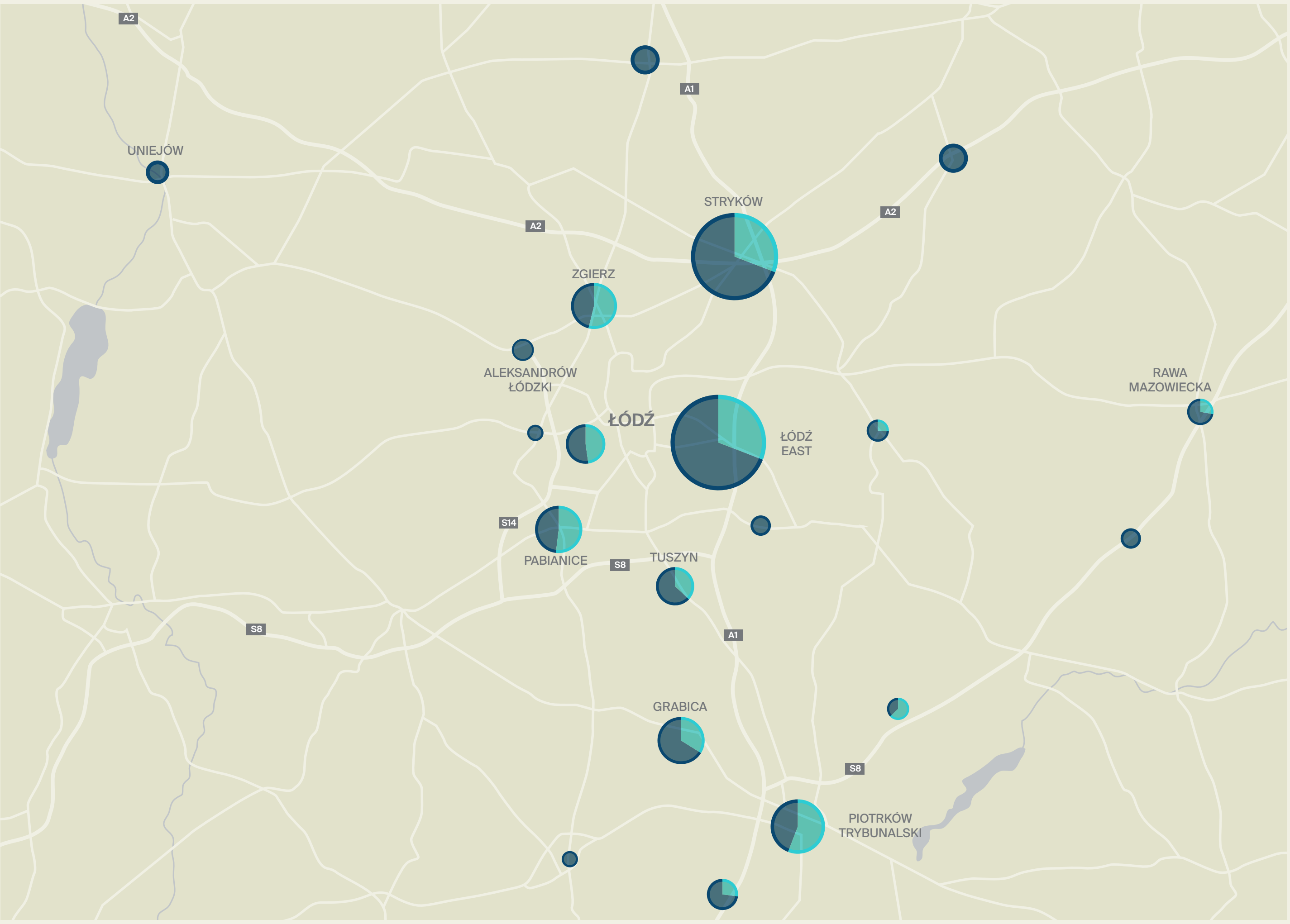
In Q2 2025, asking rents in the warehouse sector in Central Poland remained stable, as did service charges.

New warehouse supply, annual take-up, vacancy rate in Central Poland



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. Łódź East
1.42m sq m

2. Stryków
1.1m sq m

3. Grabica
330,000 sq m

4. Łódź West
240,000 sq m

5. Zgierz
220,000 sq m

Łódzkie Voivodeship

Population
2.3m

Voivodeship area
18,218 sq km

ECONOMIC DATA
(06.2025, STATISTICS POLAND)

Unemployment rate
5.7%

Average monthly salary
(enterprise sector)
PLN **8,070** (gross)

Average monthly salary
(transportation and storage sector)
PLN **8,060** (gross)

HIGH-SPEED ROADS

Highways
275 km
A1, A2

Expressways
250 km
S8, S14

CONTACTS IN POLAND:
+48 22 596 50 50
www.KnightFrank.com.pl

RESEARCH
Dorota Lachowska
dorota.lachowska@pl.knightfrank.com

INDUSTRIAL AGENCY
Natalia Mika
natalia.mika@pl.knightfrank.com

CAPITAL MARKETS
Krzysztof Cipiur
krzysztof.cipiur@pl.knightfrank.com

VALUATION & ADVISORY
Małgorzata Krzystek
malgorzata.krzystek@pl.knightfrank.com

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