

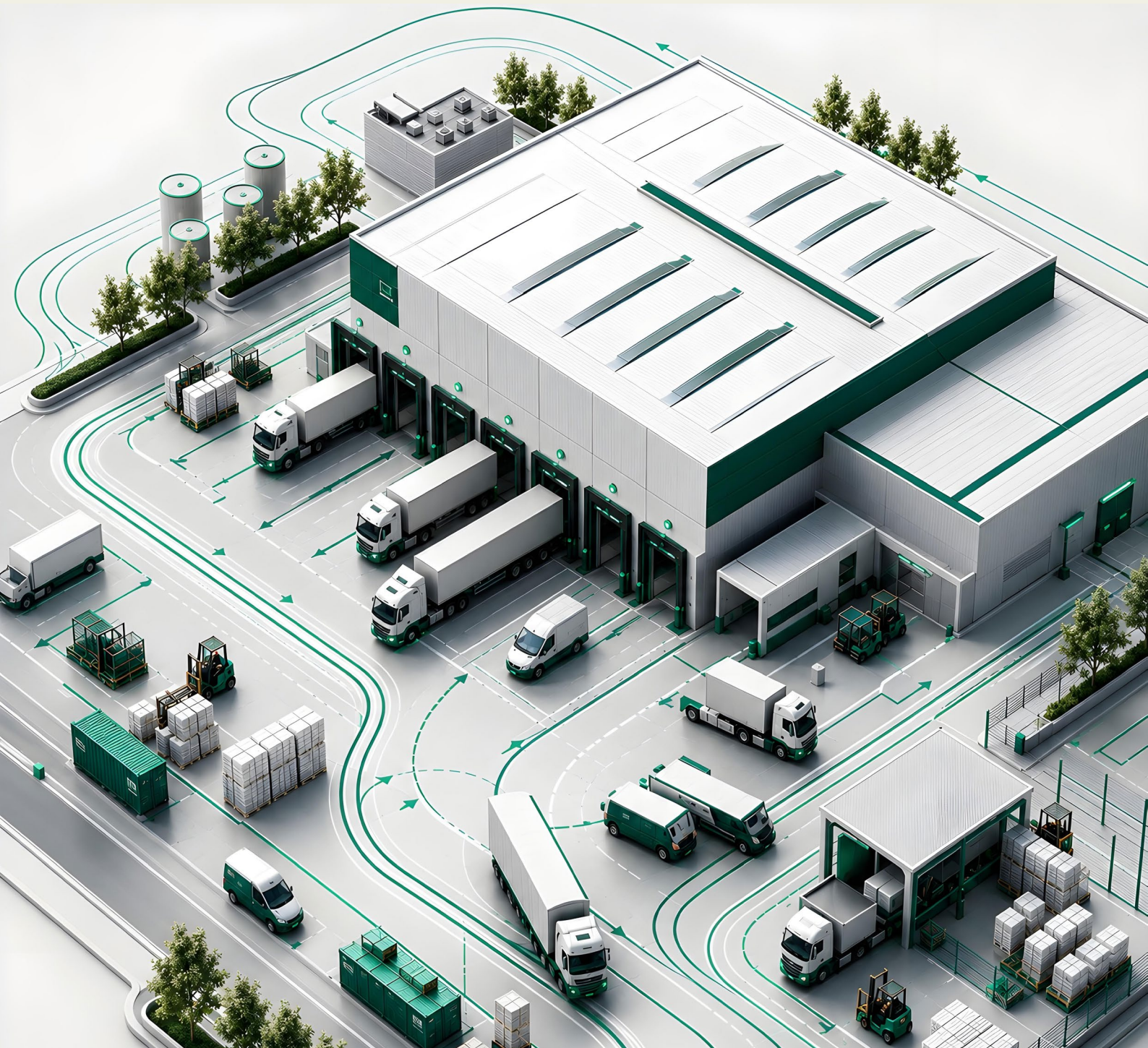
# Warehouse market



Q1 2026

The comprehensive guide to the warehouse market in Central Poland


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




**CENTRAL POLAND**

# Central Poland


Q1 2026

 Existing warehouse stock **5.1m sq m**


 Take-up (Q1 2026) **230,000 sq m**

 New supply (Q1 2026) **27,000 sq m**


 Supply under construction **160,000 sq m**


 Vacancy rate **6.7%**

## 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 per each year of lease term **1-1.5 month**

Central Poland is the country's third-largest industrial and logistics market, after Warsaw and Upper Silesia. At the end of Q1 2026, the region's modern stock totaled 5.1m sq m, representing 13.7% of Poland's total industrial and logistics supply.

The region's well-established position is driven by its central location and highly developed transport network, making it a key distribution hub for third-party logistics (3PL) operators and retail chains serving the domestic market. Its strategic importance is further enhanced by strong integration with international supply chains, including rail connections with China, which reinforce the region's role as a transshipment and distribution hub along the New Silk Road corridor. The region's principal logistics locations include Stryków, Łódź and Piotrków Trybunalski.

During Q1 2026, new supply totaled just under 27,000 sq m, representing a decline of nearly 44% y/y. The only project completed during the quarter was the expansion of an existing hall within Panattoni Park Zgierz II.

Development activity also declined. At the end of Q1 2026, more than 160,000 sq m of modern warehouse space remained under construction, representing a 36% y/y decrease. The largest projects underway included Mapletree Piotrków (41,600 sq m), the second building at Segro Logistics Park Stryków (37,900 sq m), and MLP Łódź (37,000 sq m).

The entire development pipeline was secured through pre-let agreements, with no speculative space currently under construction. This reflects developers' cautious approach towards launching new speculative projects in the region.

Total leasing activity reached approximately 230,000 sq m during Q1 2026, representing an increase of nearly 50% y/y. Quarter-on-quarter, however, leasing activity declined, reflecting the exceptionally strong performance recorded in Q4 2025, when total take-up reached approximately 550,000 sq m, making it one of the strongest quarters in the history of the Central Poland market.

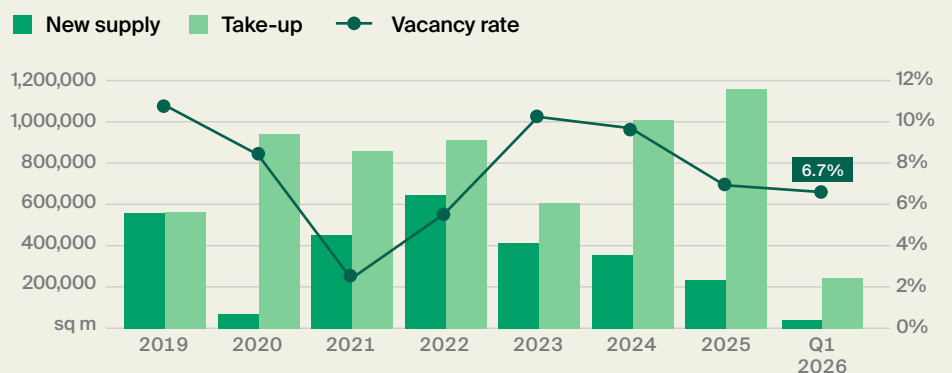
The largest leasing transactions completed during the quarter included a 68,300 sq m lease renewal at Logistic City Piotrków Trybunalski, a 45,000 sq m lease extension at EQT Exeter Park Stryków, and a 23,100 sq m new lease at P3 Piotrków.

Lease renewals dominated occupier activity, accounting for 56% of total take-up. New leases represented 32%, while expansions accounted for the remaining 12%.

The vacancy rate continued its downward trend, reaching 6.7% at the end of Q1 2026, 3.3 percentage points lower year-on-year. The decline in immediately available space was primarily driven by stable occupier take-up alongside limited speculative completions.

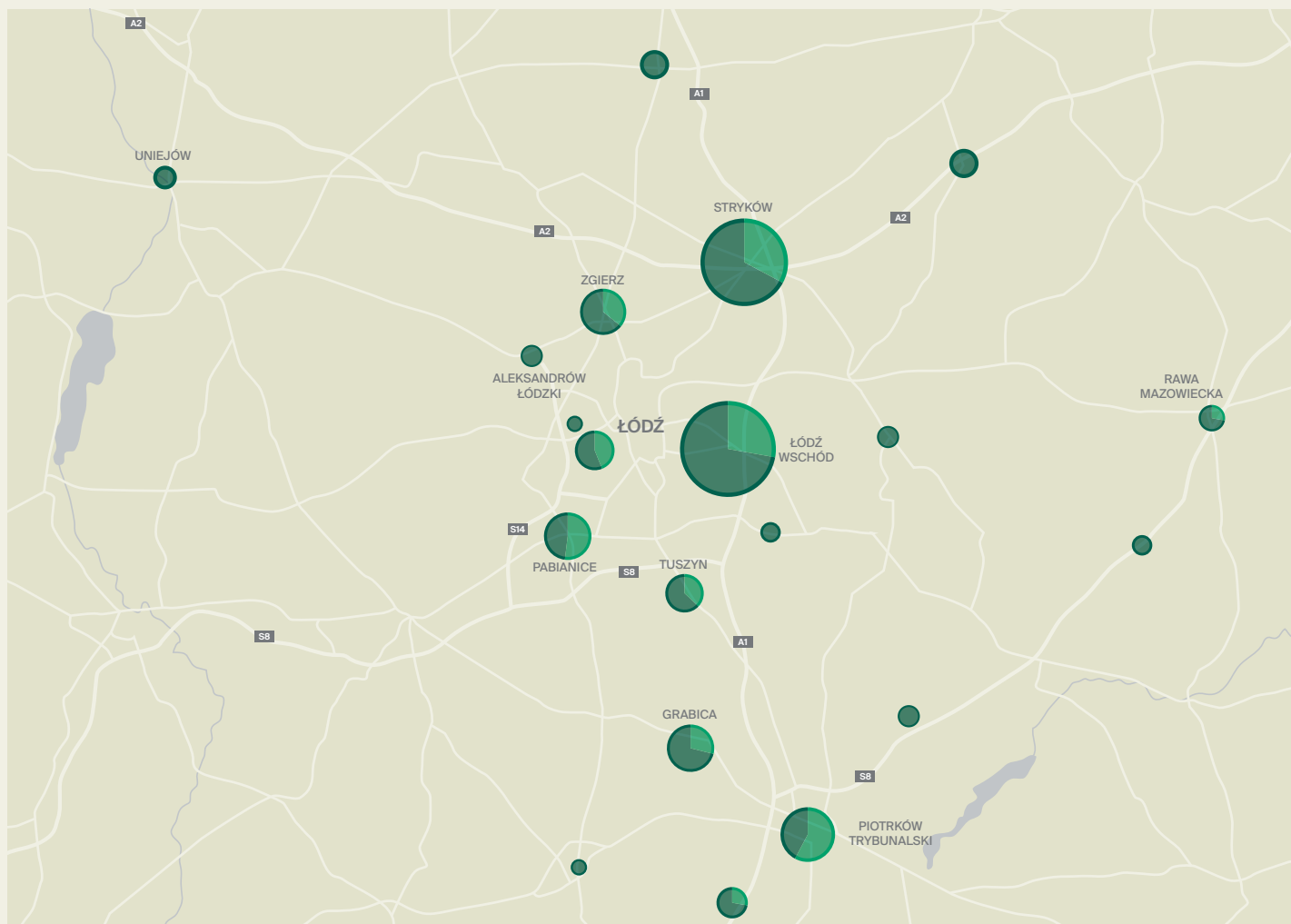
Asking rents across the Central Poland warehouse market remained stable compared with the previous quarter.

## 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  
1.49m sq m
- 2.** Stryków  
1.13m sq m
- 3.** Grabica  
330,000 sq m
- 4.** Zgierz  
290,000 sq m
- 5.** Łódź West  
240,000 sq m

### Łódzkie Voivodeship



Population  
**2.3m**



Voivodeship area  
**18,218 sq km**

### ECONOMIC DATA (03.2026, STATISTICS POLAND)



Unemployment rate  
**6.7%**



Average monthly salary  
(enterprise sector)  
**PLN 8,600** (gross)



Average monthly salary  
(transportation and storage sector)  
**PLN 8,500** (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

**CEO**

Charles Taylor  
charles.taylor@pl.knightfrank.com

**RESEARCH**

Dorota Lachowska  
dorota.lachowska@pl.knightfrank.com

**INDUSTRIAL AGENCY**

Marta Keszowska-Rodriguez  
marta.keszkowska@pl.knightfrank.com

**CAPITAL MARKETS**

Michał Grabara  
michal.grabara@pl.knightfrank.com

**VALUATION & ADVISORY**

Małgorzata Krzystek  
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. 2026

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