Warehouse market

Q3 2025

The comprehensive guide to the warehouse market in Central Poland

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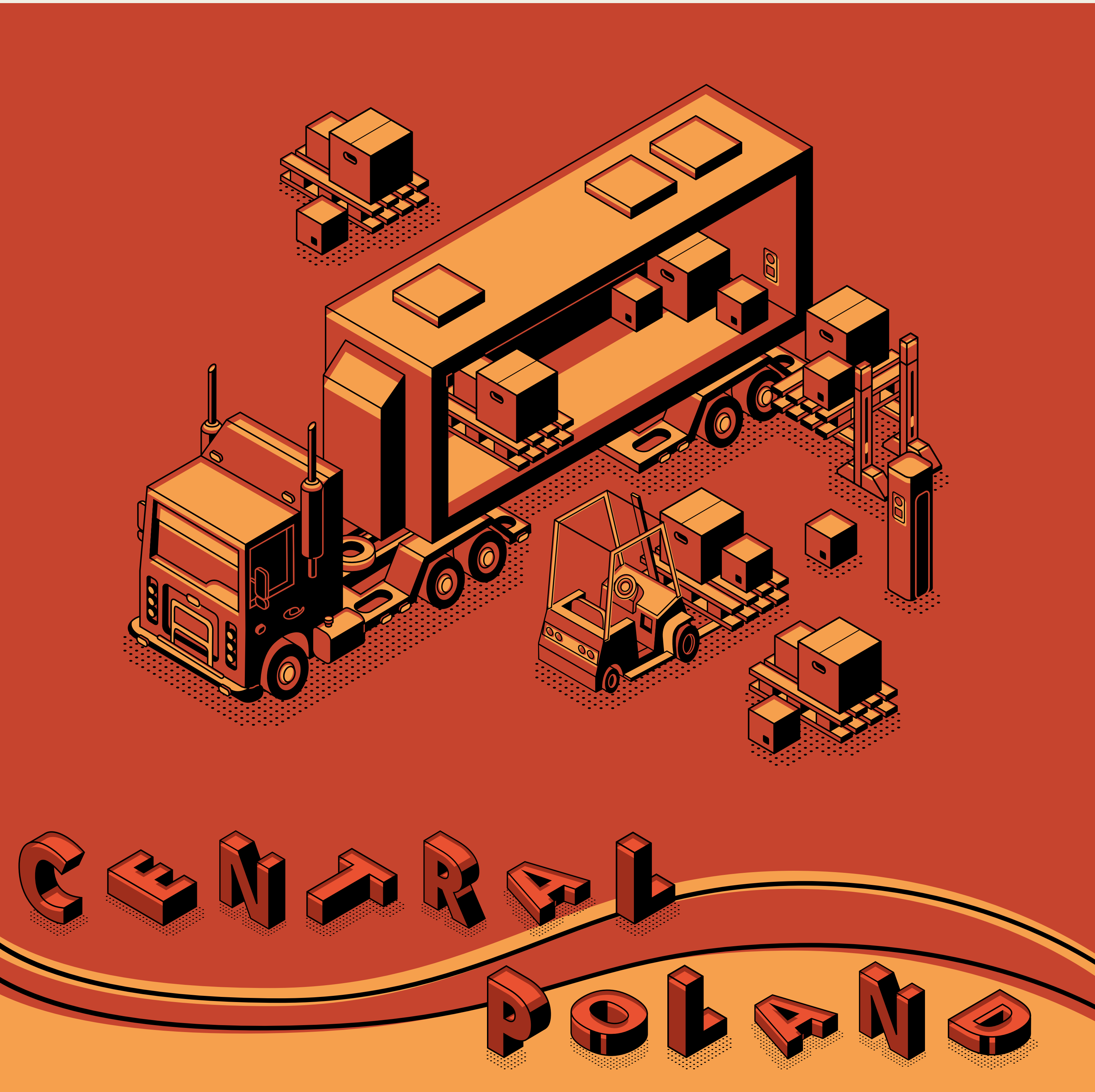


Central Poland

Q3 2025

Existing warehouse stock
↑ **5.1m sq m**

Supply under construction
↓ **90,000 sq m**

Vacancy rate
↑ **9.5%**

New supply
(Q1-Q3 2025)
↑ **220,000 sq m**

Take-up
(Q1-Q3 2025)
↑ **630,000 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 country's key warehouse markets, underpinned by its strategic location at the very heart of Poland and at the intersection of major transport corridors. The region is positioned along the A1 and A2 motorways and an extensive network of express roads linking Warsaw, Łódź, Poznań and Upper Silesia, enabling efficient nationwide distribution and seamless access to all major domestic markets. The region's core strengths include its central location, well-developed road and rail infrastructure, access to a competitive labour pool, and the presence of large-scale logistics parks and leading 3PL operators. Together, these factors ensure that Central Poland continues to rank among the most important and dynamic logistics markets in the country.

With warehouse stock exceeding 5.1 million sq m, Central Poland accounts for nearly 14% of total national supply, ranking behind only the Warsaw and Upper Silesia regions. Key logistics locations include Stryków, Łódź and Piotrków Trybunalski.

In Q1-Q3 2025, developers delivered nearly 220,000 sq m of modern warehouse space to the Central Poland market, representing a 26% year-on-year decline. Q3 alone accounted for 145,000 sq m across six modern facilities. The largest completions included the expansion of Panattoni Park Zgierz II (41,900 sq m), a new building at Prologis Park Łódź (41,500 sq m), and a BTS project at Hillwood Zgłoszcz (32,800 sq m).

As of the end of September 2025, total space under construction stood at just over 90,000 sq m, down by 60% compared with the same period last year. However, 65,000 sq m was launched in Q3 alone, which may signal a gradual recovery in development activity.

Notably, close to 60% of the pipeline has already been secured by pre-let agreements, highlighting stable, long-term demand for warehouse space in the region.

Occupier demand in Central Poland remains exceptionally strong and, in terms of take-up volume, is second only to the Warsaw region. Between January and September 2025, tenants leased more than 630,000 sq m of warehouse space. Take-up growth in Q3 exceeded 14% quarter-on-quarter, while the cumulative result for the first three quarters was almost identical to the previous year, confirming the market's stability and enduring attractiveness.

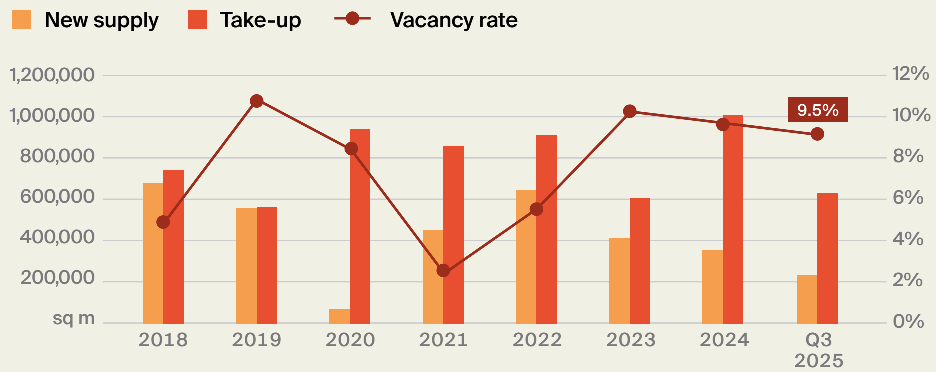
Given its central location, demand in Central Poland is dominated by logistics operators and 3PL providers, as well as retail chains and e-commerce companies.

Vacancy levels remain below 10% and fluctuate only moderately quarter-on-quarter. At the end of Q3 2025, the vacancy rate stood at 9.5%, up by 0.4 pp compared with Q2, but down by 1.7 pp year-on-year.

The slight increase in Q3 2025 was primarily driven by the delivery of a relatively large volume of new supply during the quarter.

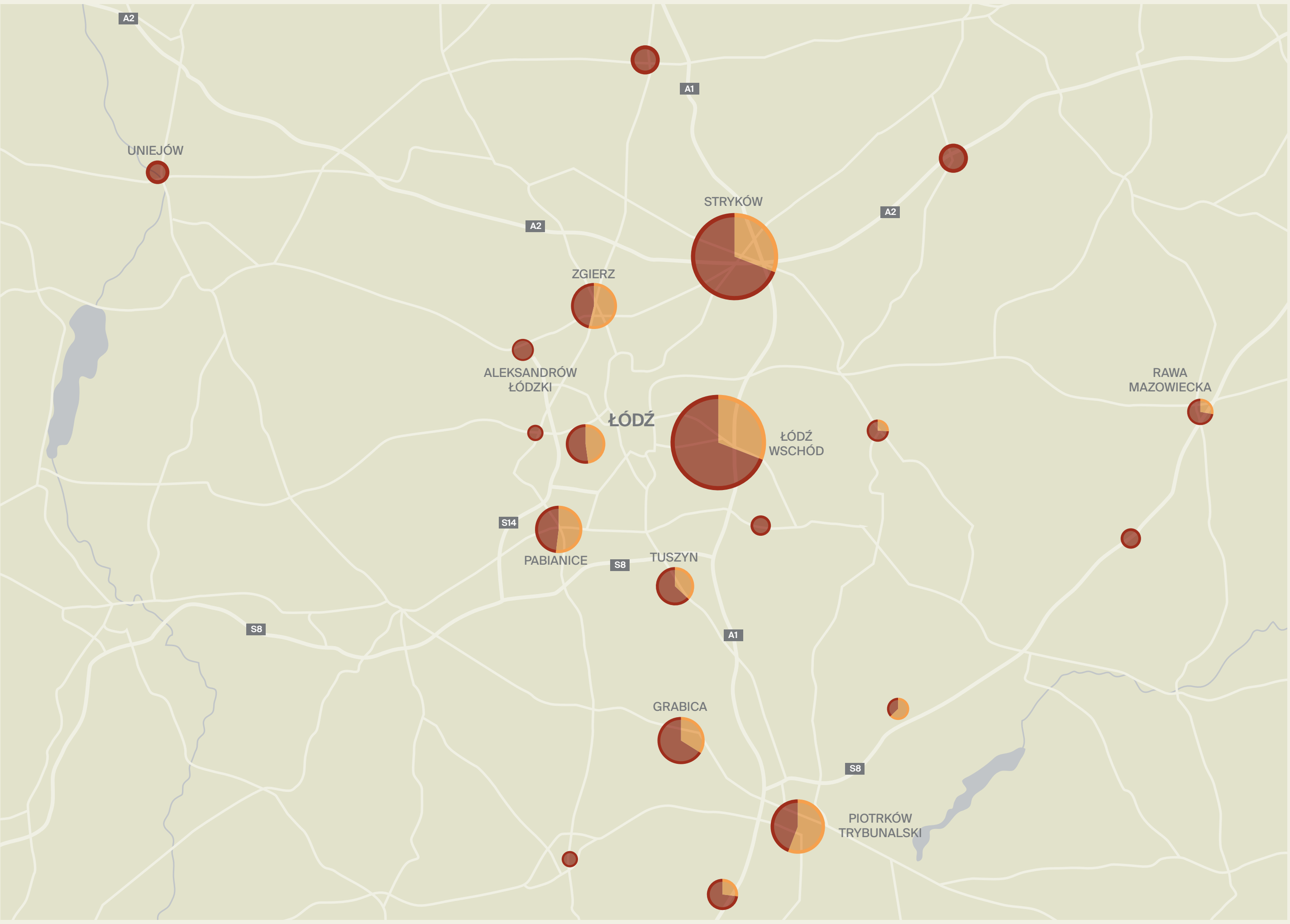
Asking rents remained stable in Q3 2025, ranging between EUR 3.8 and 4.5/sq m/month.

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
260,000 sq m

5. Łódź West
240,000 sq m

Łódzkie Voivodeship

Population
2.3m

Voivodeship area
18,218 sq km

ECONOMIC DATA
(09.2025, STATISTICS POLAND)

Unemployment rate
6.2%

Average monthly salary
(enterprise sector)
PLN **8,100** (gross)

Average monthly salary
(transportation and storage sector)
PLN **8,300** (gross)

HIGH-SPEED ROADS

Highways
275 km
A1, A2

Expressways
250 km
S8, S14

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