# Warehouse market

Q4 2025

The comprehensive guide to the warehouse market in Central Poland

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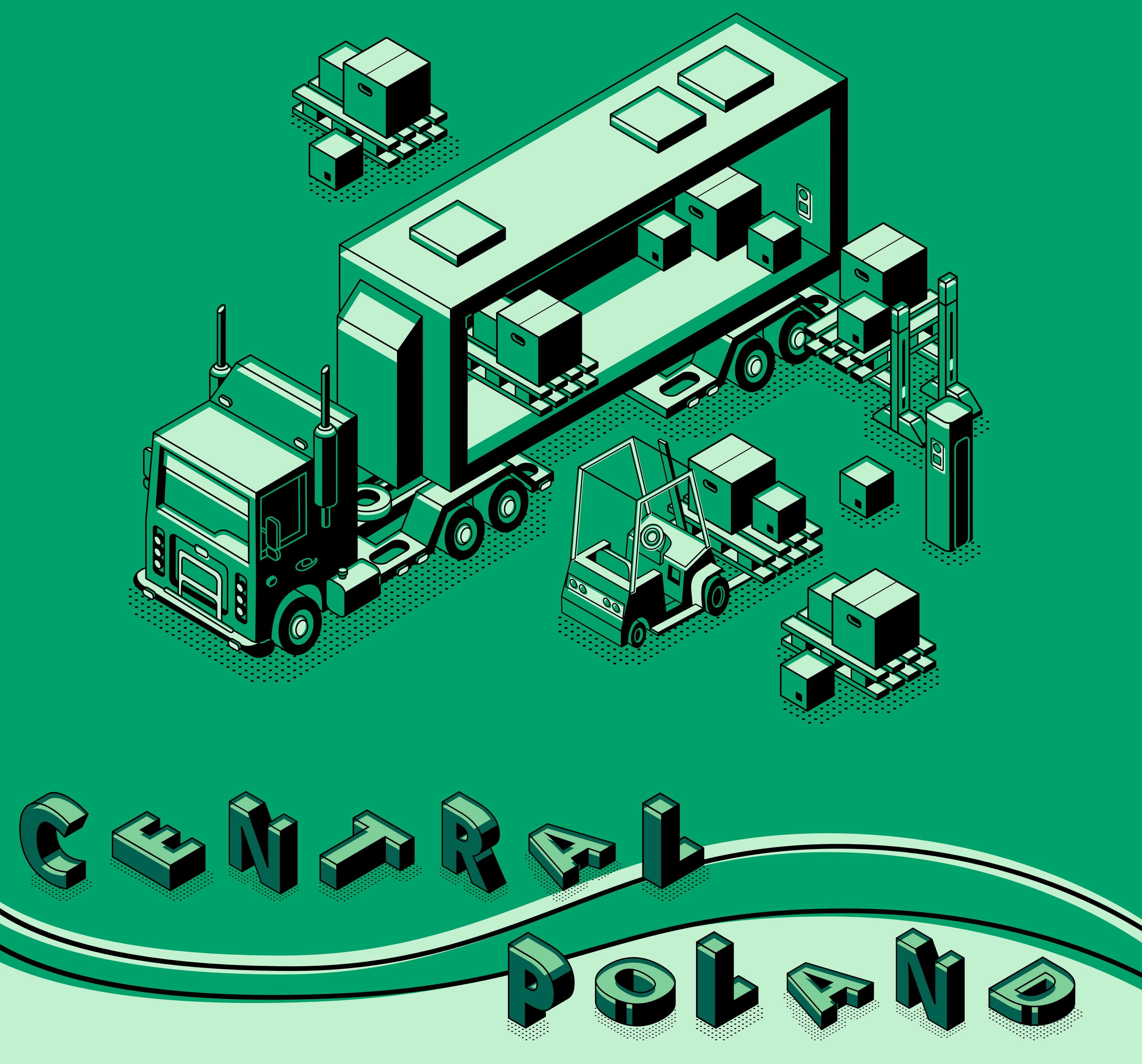


# Central Poland

## Q4 2025

Existing warehouse stock
**5.1m sq m**

Take-up
(2025)
**1.18m sq m**

New supply
(2025)
**220,000 sq m**

Supply under construction
**190,000 sq m**

Vacancy rate
**7.0%**

### 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 remains the third largest warehouse market in the country, following Warsaw and Upper Silesia, and continues to function as a key national distribution hub. At the end of Q4 2025, the region's modern logistics and warehouse stock totalled 5.1m sq m, representing nearly 13.9% of Poland's total supply. The market benefits from strong demand from logistics operators and retail chains, which locate their central warehouses and distribution centres in the region to service nationwide distribution. The recently launched rail connection with Chengdu has further strengthened Central Poland's role in European–Asian supply chains, providing an additional impetus for development. Core logistics locations include Stryków, Łódź and Piotrków Trybunalski, while the Konin area has been gaining prominence in recent periods due to its favourable accessibility and proximity to the A1 motorway.**

Warehouse stock in Central Poland continued to grow, recording annual expansion of over 4%, although the pace has noticeably moderated. In 2025, developers delivered approximately 220,000 sq m of modern space, down 37% y/y and well below the five year average. The largest completions included Panattoni Park Zgierz II (41,900 sq m), Prologis Park Łódź (45,000 sq m) and the BTS facility Hillwood Zelgoszcz (32,800 sq m).

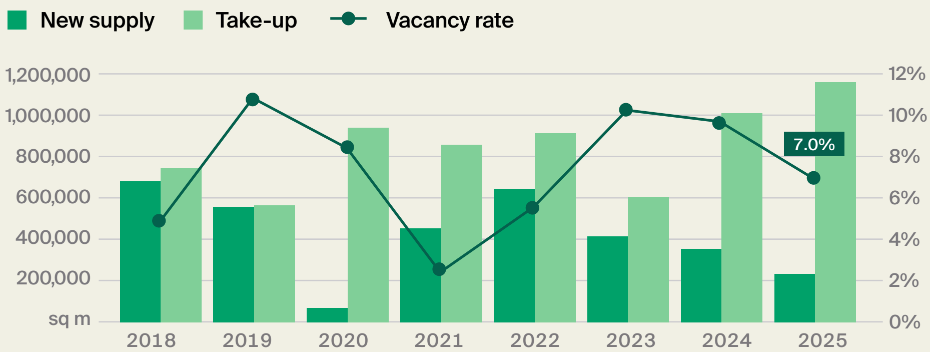
At the end of December 2025, nearly 190,000 sq m remained under construction. The largest ongoing project was another building at Mapletree Piotrków II, totalling 41,600 sq m. The development pipeline contracted by around 19% y/y, although close to 100,000 sq m of new space broke ground in Q4. A distinctive feature of the market remains the high level of pre-leasing, with approximately 85% of the space under development secured by lease agreements.

Demand remains robust. In 2025, total leasing activity reached 1.17 m sq m, an increase of more than 17% y/y and the highest result ever recorded in the region. 2025 take up in Central Poland surpassed the five year average by nearly 260,000 sq m and represented roughly 17% of national demand. The largest lease transactions included renewals and expansions at Mapletree Piotrków II (86,500 sq m and 41,600 sq m), leases at SEGRO Logistics Park Stryków (82,300 sq m and 37,800 sq m), as well as a renewal at Panattoni Park Łódź (TERG) totalling 73,100 sq m.

High tenant activity combined with limited speculative supply translated into a visible improvement in absorption indicators. The vacancy rate at the end of Q4 2025 stood at approximately 7.0%, decreasing by 2.7 pp year-on-year.

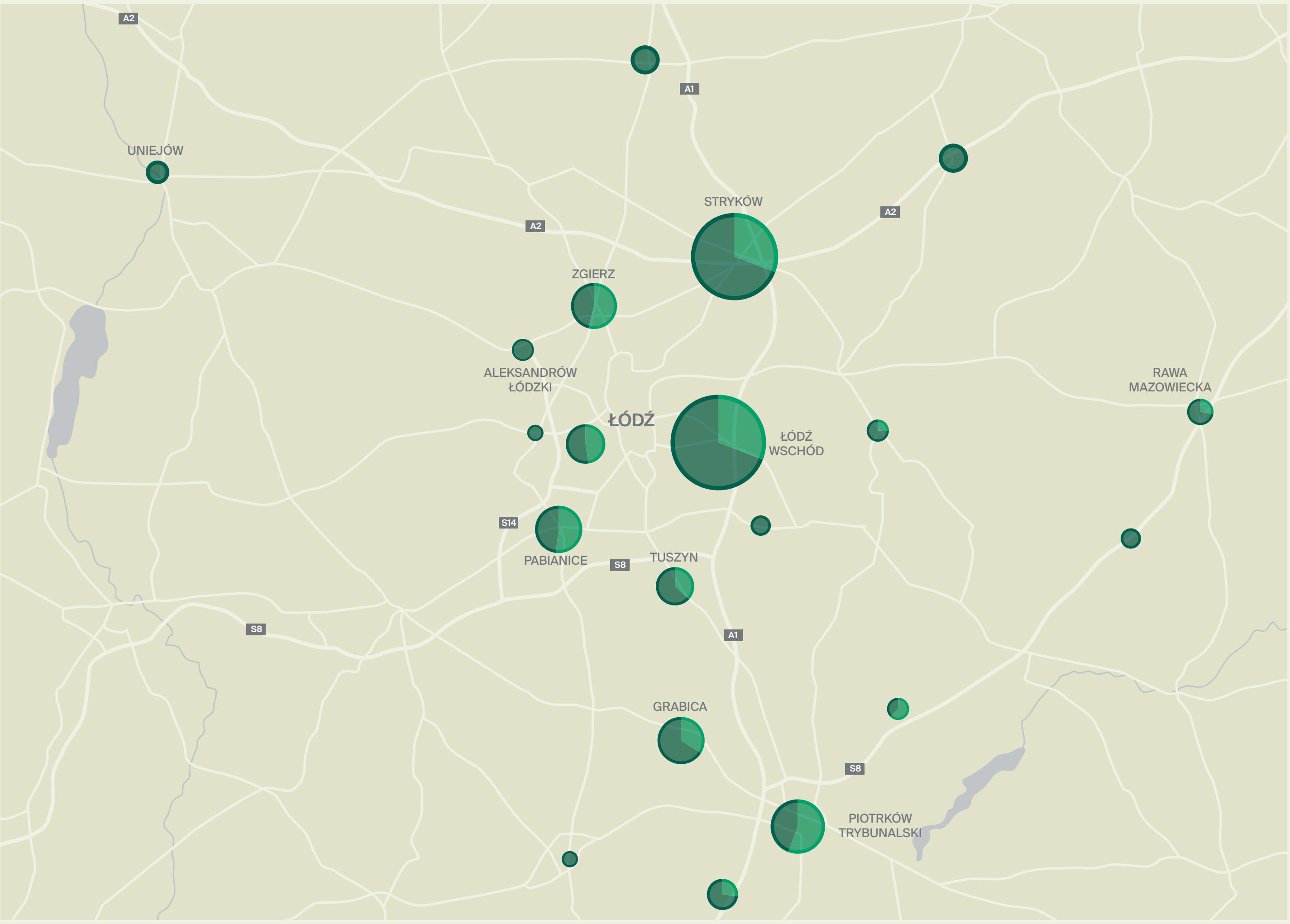
At the same time, asking rents in the region remained stable and in Q4 2025 were broadly in line with the previous quarter, ranging between EUR 3.80 and 4.50 per sq m per month.

### 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
(12.2025, STATISTICS POLAND)

Unemployment rate
**6.3%**

Average monthly salary
(enterprise sector)
PLN **9,000** (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

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