Warehouse market

H1 2025 | The comprehensive guide to the warehouse market in Wielkopolska | knightfrank.com.pl/en/research

Wielkopolska

H1 2025

Existing warehouse stock
3.6m sq m

Supply under construction
80,000 sq m

Vacancy rate
8.7%

New supply
(H1 2025)
70,000 sq m

Take-up
(H1 2025)
250,000 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

Wielkopolska ranks as the fifth-largest warehouse market in Poland, following Warsaw, Upper Silesia, Central Poland, and Lower Silesia. As of the end of Q2 2025, the total warehouse stock in the region reached 3.6m sq m, accounting for 9.9% of the country's total supply. The region's warehouse market growth is supported by its proximity to the German border, easy access to the A2 motorway, availability of a skilled workforce, and an increasing number of operations being relocated from Western Europe to Poland. The region is particularly attractive to companies from the automotive and logistics sectors. The key warehouse locations include Swarzędz, Tarnowo Podgórne, Gądki, and Komorniki.

A clear slowdown in developer activity is visible in the market. Between January and June 2025, nearly 70,000 sq m of modern warehouse space was delivered, representing a decline of over 60% compared to the same period of the previous year. In Q2 2025, only one project was completed — 7R City Flex Park Poznań East I, offering 9,700 sq m.

At the end of June 2025, over 80,000 sq m of warehouse space was under construction, with the largest ongoing project being MLP Poznań West (32,800 sq m). Developer activity remains limited, as evidenced by the fact that only one project was launched between March and June, and 70% of the space under construction is secured by pre-let agreements.

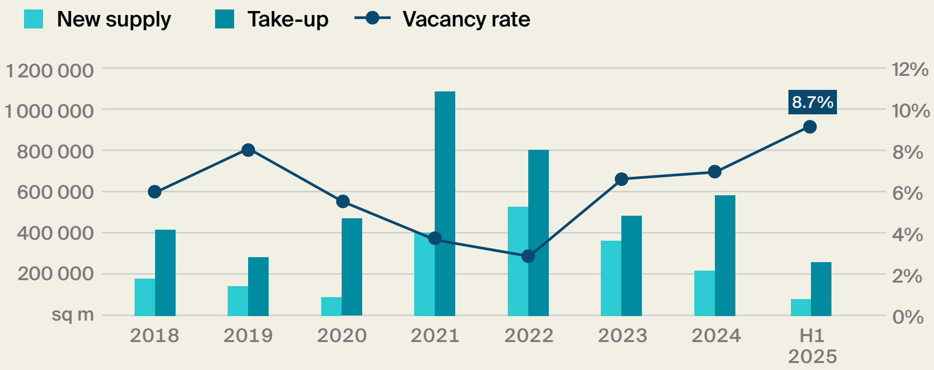
In H1 2025, 250,000 sq m of warehouse space was leased in the region, reflecting a 14% decrease compared to the same period in the previous year. The largest lease transactions during this time included a lease renewal at Eurocash Konin (39,600 sq m), a renewal at Segro Logistics Park Poznań (34,200 sq m), and a new lease at Prologis Park Poznań II (17,800 sq m).

Leasing activity in the region was dominated by renewals, which accounted for 80% of the leased space. New leases made up 18%, and expansions represented the remaining 2%.

At the end of Q2 2025, the vacancy rate in Wielkopolska stood at 8.7%, representing an increase of 0.5 pp quarter-on-quarter, and 2.7 pp year-on-year. This increase was driven by both weakened take-up and the delivery of new supply that has not yet been fully commercialised.

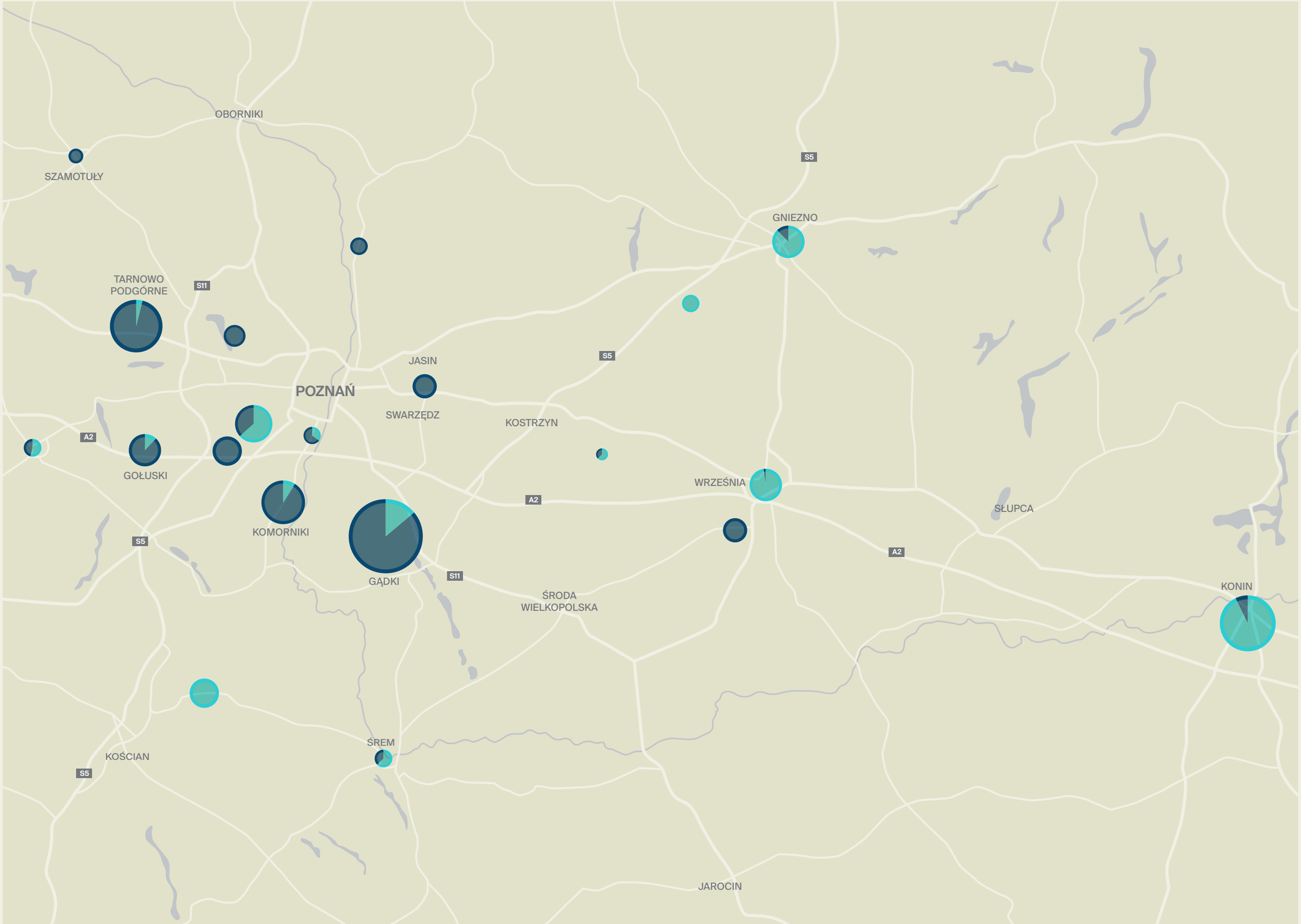
In Q2 2025, asking rents and service charges in the region remained stable compared to the previous quarter.

New warehouse supply, annual take-up, vacancy rate in Wielkopolska



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. **Gądki** 1.37m sq m
2. **Tarnowo Podgórne** 550,000 sq m
3. **Komorniki** 410,000 sq m
4. **Poznań** 360,000 sq m
5. **Gołuski** 250,000 sq m

Wielkopolskie Voivodeship

Population
3.5m

Voivodeship area
29,827 sq km

ECONOMIC DATA
(06.2025, STATISTICS POLAND)

Unemployment rate
3.1%

Average monthly salary
(enterprise sector)
PLN **7,860** (gross)

Average monthly salary
(transportation and storage sector)
PLN **8,420** (gross)

HIGH-SPEED ROADS

Highways
210 km
A2

Expressways
275 km
S5, S8, S10, S11

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