Warehouse market

Q1 2026

The comprehensive guide to the warehouse market in Wielkopolska

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WIELKOPOLSKA

Wielkopolska

Q1 2026

Existing warehouse stock
3.8m sq m

New supply (Q1 2026)
35,000 sq m

Supply under construction
80,000 sq m

Take-up (Q1 2026)
300,000 sq m

Vacancy rate
8.0%

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
per each year of lease term
1-1.5 month

Wielkopolska remains Poland's fifth-largest industrial and logistics market, following Warsaw, Upper Silesia, Central Poland and Lower Silesia. Supported by its strategic location and well-developed transport infrastructure, the region continues to strengthen its position as one of the country's leading logistics hubs. At the end of Q1 2026, total modern warehouse stock reached approximately 3.8m sq m, accounting for 10.1% of Poland's total industrial and logistics supply.

The region's logistics sector continues to benefit from its proximity to the German market, direct access to the A2 motorway, the availability of a skilled labour force, and the ongoing relocation of manufacturing and logistics operations from Western Europe to Poland. Wielkopolska remains particularly attractive to occupiers from the automotive and logistics sectors. The highest concentration of modern warehouse space is located in Swarzędz, Tarnowo Podgórne, Gądki and Komorniki.

Warehouse stock continued to expand, increasing by more than 6% y/y. During Q1 2026, developers delivered more than 34,500 sq m of modern warehouse space, representing an increase of over 40% compared with the corresponding period of the previous year. The projects completed during the quarter included MLP Poznań West (32,900 sq m) and a 1,750 sq m warehouse at Kostrzyn Logistics and Warehouse Centre.

At the end of March 2026, approximately 80,000 sq m of warehouse space remained under construction, broadly in line with the level recorded a year earlier. The largest project underway was a 45,800 sq m facility at Prologis Park Poznań III, construction of which commenced during Q1 2026. Between January and March, developers started four new warehouse projects with a combined area of nearly 60,000 sq m. Almost the entire development pipeline had been secured through pre-let agreements, reflecting developers' continued cautious approach towards speculative development.

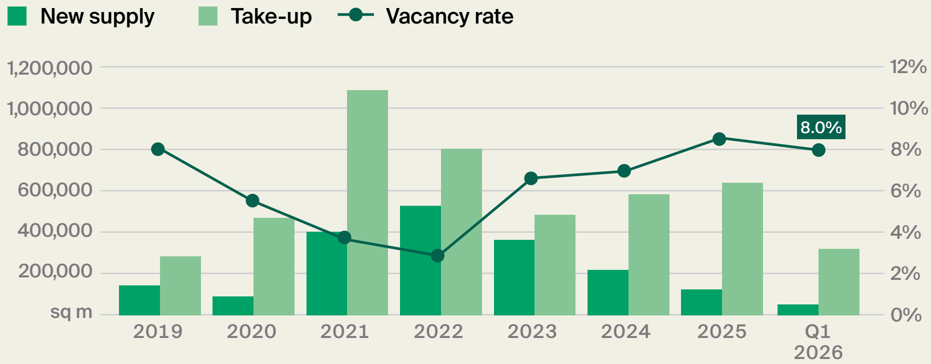
Total leasing activity reached nearly 300,000 sq m during Q1 2026. Occupier demand increased significantly compared with the same period of 2025, while remaining broadly stable quarter-on-quarter. The largest transactions completed during the quarter included a 49,700 sq m lease renewal at P3 Poznań, a 46,000 sq m new lease at Prologis Park Poznań III, and a 32,600 sq m lease renegotiation at MEP Industrial Centre Poznań.

Demand was led by sale-and-leaseback transactions, which accounted for 42% of total take-up. Lease renewals represented 31%, while new leases made up the remaining 27% of occupier activity.

At the end of Q1 2026, the vacancy rate in Wielkopolska recorded a slight decline, decreasing by 0.5 pp. q/q and 0.2 pp. y/y. This trend points to a stabilising supply-demand balance and continued market absorption.

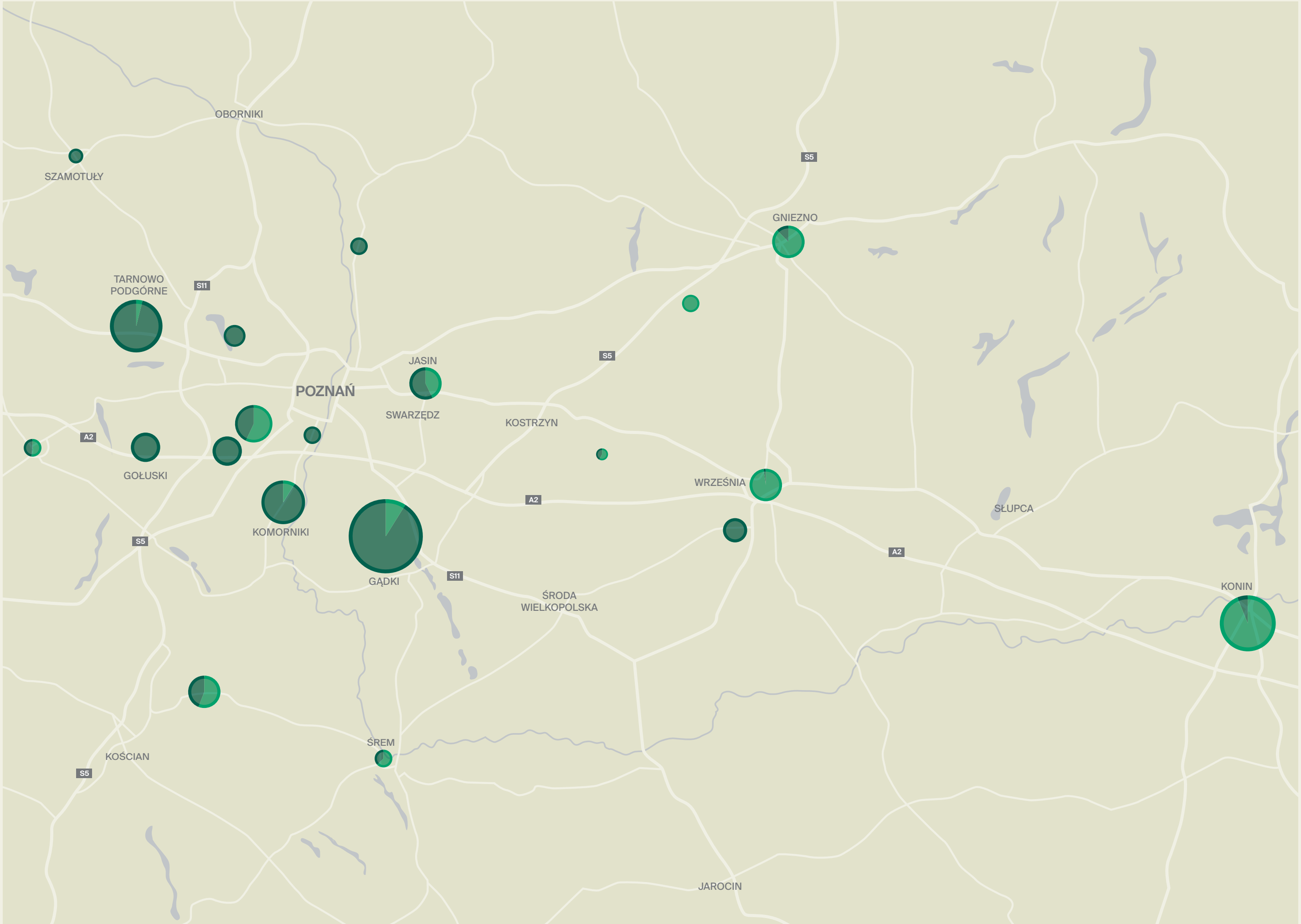
Asking rents across the Wielkopolska industrial and logistics market remained stable compared with the previous quarter, confirming the continued equilibrium between occupier demand and new supply.

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
370,000 sq m

5. Gołuski
270,000 sq m

Wielkopolskie Voivodeship

Population
3.5m

Voivodeship area
29,827 sq km

ECONOMIC DATA
(09.2025, STATISTICS POLAND)

Unemployment rate
3.9%

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

Average monthly salary
(transportation and storage sector)
PLN **8,600** (gross)

HIGH-SPEED ROADS

Highways
210 km
A2

Expressways
275 km
S5, S8, S10, S11

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