# Warehouse market

**Q4 2025**

The comprehensive guide to the warehouse market in Wielkopolska

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WAREHOUSE MARKET

# Wielkopolska

**Q4 2025**

Existing warehouse stock
**3.6m sq m**

New supply
(2025)
**120,000 sq m**

Supply under construction
**35,000 sq m**

Take-up
(2025)
**630,000 sq m**

Vacancy rate
**8.5%**

## 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**

**The Wielkopolska region is the fifth largest warehouse market in Poland, following Warsaw, Upper Silesia, Central Poland and Lower Silesia. Benefiting from a favourable geographic position and a well developed transport network, the region continues to attract both developers and occupiers. At the end of Q4 2025, total warehouse stock reached approximately 3.6m sq m, representing 9.9% of the country's modern supply.**

**Growth in the region is supported by its proximity to the German border, direct access to the A2 motorway, an large labour pool and the increasing trend of nearshoring and relocating operational processes from Asia to Poland. Wielkopolska remains particularly attractive to occupiers from the automotive and logistics sectors, with the largest warehouse clusters concentrated around Swarzędz, Tarnowo Podgórne, Gądki and Komorniki.**

The pace of new warehouse supply in the region continued to slow. In 2025, less than 120,000 sq m of new space was delivered, a 44% y/y decline and a level well below the five year average. The largest completions included Hillwood Poznań Czempiń (53,700 sq m), a facility delivered by Luvena Nieruchomości (16,000 sq m), and 7R City Flex Park Poznań East I (9,800 sq m).

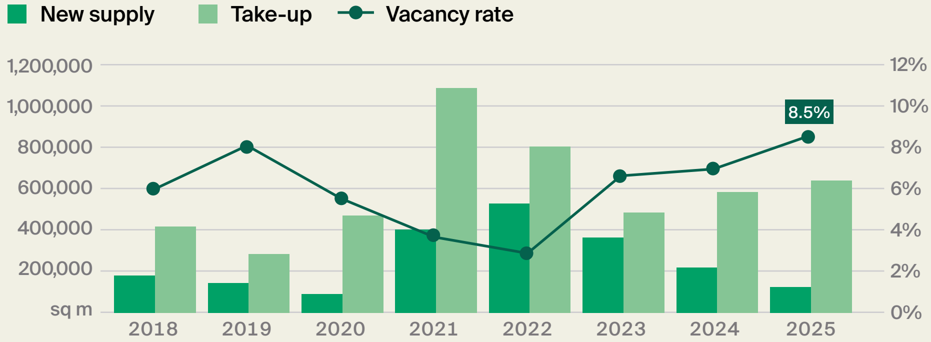
Development activity remained constrained. At the end of December 2025, only 35,000 sq m of warehouse space was under construction, nearly 80% less than a year earlier. The largest ongoing development is a 32,800 sq m building within MLP Poznań West. Almost all space under construction is already secured by lease agreements, and no new schemes were launched during Q4.

Demand, however, remained strong. In 2025, tenants leased more than 630,000 sq m of warehouse space, an increase of over 10% y/y. Quarterly activity also grew, rising both compared to the previous quarter and the corresponding period in 2024 (up by 58%). Major lease transactions included a renegotiation at Prologis Park Poznań III (48,400 sq m), a new lease at Panattoni Park Poznań East III (47,000 sq m) and a lease extension at the Eurocash facility in Konin (39,600 sq m).

The vacancy rate continued to decline. At the end of Q4 2025, vacancy fell to 8.5%, down from 9.5% at the end of Q3. Given the absence of new speculative development, a continued downward trend is expected.

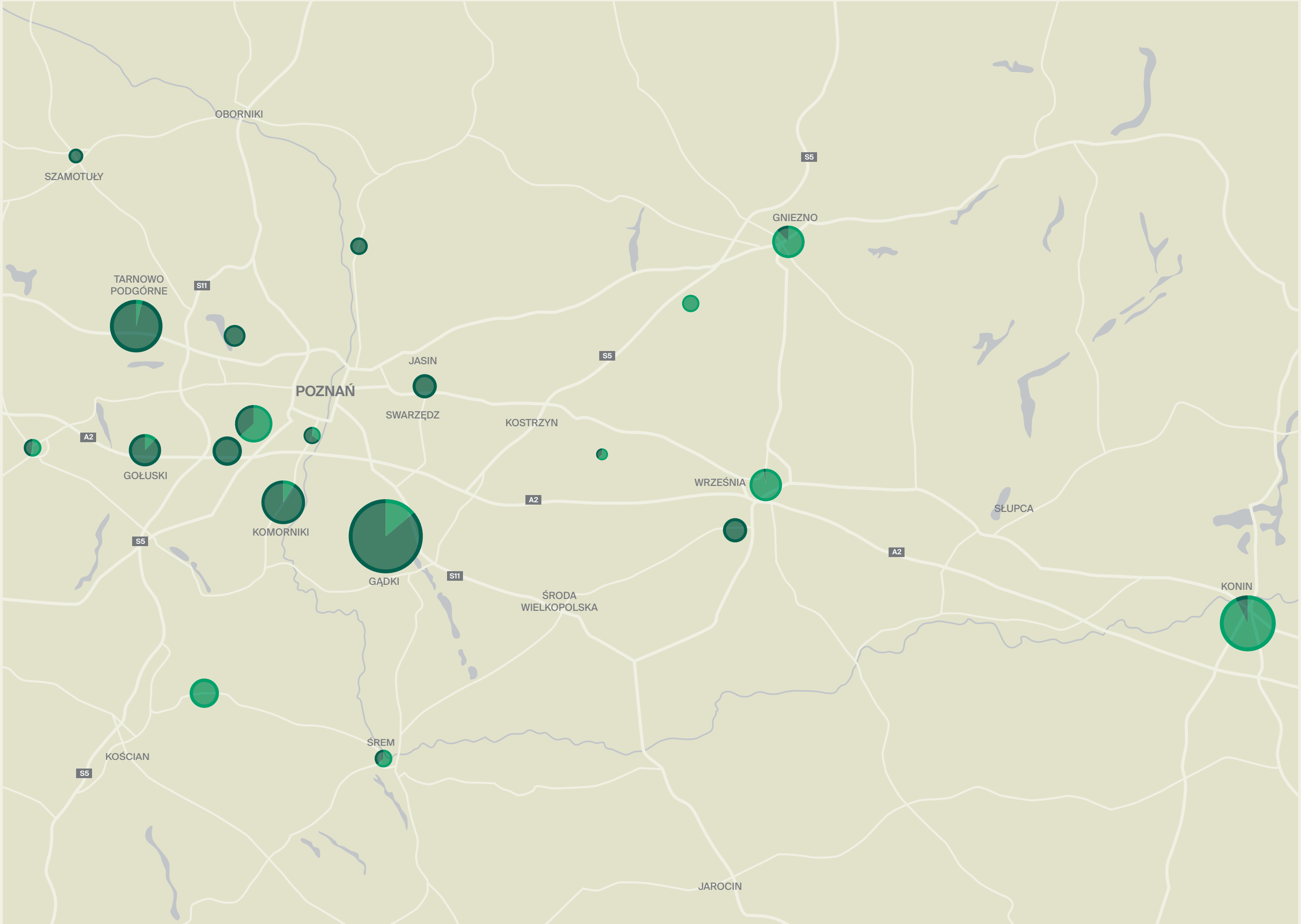
Asking rental rates in the warehouse sector in the region remained stable quarter-on-quarter and ranged between EUR 3.80 and 4.50 per sq m per month.

### 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** 250,000 sq m

### Wielkopolskie Voivodeship

Population
**3.5m**

Voivodeship area
**29,827** sq km

#### ECONOMIC DATA
(09.2025, STATISTICS POLAND)

Unemployment rate
**3.5%**

Average monthly salary
(enterprise sector)
PLN **8,300** (gross)

Average monthly salary
(transportation and storage sector)
PLN **8,700** (gross)

#### HIGH-SPEED ROADS

Highways
**210** km
A2

Expressways
**275** km
S5, S8, S10, S11

**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**
Przemysław Piętak
przemyslaw.pietak@pl.knightfrank.com

**CAPITAL MARKETS**
Krzysztof Cipiur
krzysztof.cipiur@pl.knightfrank.com

**VALUATION & ADVISORY**
Małgorzata Krzystek
malgorzata.krzystek@pl.knightfrank.com

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Substantive preparation: Szymon Sobiecki / Research / Knight Frank

Graphic design: Karolina Chodak-Brzozowska / Art Director / PR & Marketing / Knight Frank