Chinese E-commerce Reshapes Poland's Warehouse Market

Knight Frank

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How New EU Customs Policies Are Driving the Expansion of Chinese E-commerce Platforms and Transforming Poland's Logistics Landscape in 2026.

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Executive summary

Chinese e-commerce operators have rapidly emerged as one of the most important sources of warehouse demand in Poland.

In Q1–Q3 2026, Chinese occupiers leased nearly 1 million sq m, accounting for approximately 18% of Poland's total gross take-up and exceeding the combined volume recorded during their entire previous presence in the market.

The expansion initially focused on Lower Silesia, whose proximity to Germany and strategic location within Central Europe enable efficient distribution across both Western European and CEE markets. As the availability of large warehouse units tightened, demand spread to other locations, particularly Central Poland, Western Poland and the Warsaw region.

The scale of this activity has supported a decline in vacancy and strengthened landlords' negotiating position.

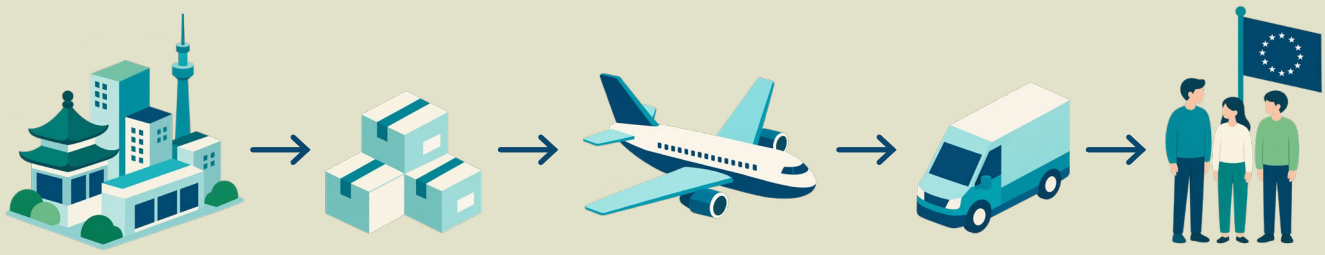
However, the long-term sustainability of demand remains uncertain, as occupier strategies remain sensitive to EU customs regulations, shipping costs and the availability of suitable large-scale facilities.

From direct parcel shipping to EU-based fulfilment

EU customs changes introduced on 1 July 2026 are driving Chinese e-commerce operators to move inventory closer to European consumers.

Previous model

Direct shipping of individual parcels from China



Emerging model

Importing in bulk and local fulfilment from EU warehouses



A new source of demand

Poland's warehouse market recorded gross take-up of 5.32 million sq m in Q1–Q3 2026, up 20% compared with the corresponding period of 2025.

Growth was driven to a significant extent by Chinese companies establishing and expanding their European logistics operations in response to changes in the EU customs framework.

Against this backdrop, Chinese occupiers leased approximately one million sq m of warehouse space in Poland in Q1–Q3 2026. This represented around 18% of the country's total gross take-up and exceeded the combined volume leased by Chinese companies throughout their entire previous presence in the Polish warehouse market.

The rapid expansion has established Chinese e-commerce as a major new source of demand. Shein and Temu have been the principal occupiers driving activity, although the wider trend reflects the growing role of Poland as a distribution base for Chinese companies serving European consumers.

EU customs changes are reshaping e-commerce logistics

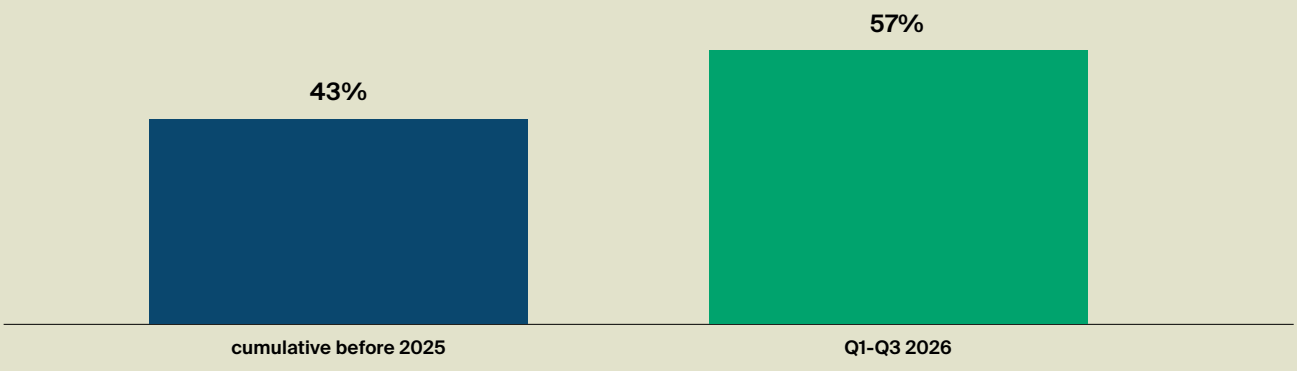
From 1 July 2026, the EU abolished the customs duty exemption previously available for consignments valued at up to EUR 150 and introduced a temporary flat-rate duty of EUR 3 per declared product category. The flat rate is expected to remain in place until 1 July 2028, when it will be replaced by standard product-specific tariffs under the new EU customs system. Additionally, from 1 November 2026, the EU introduced a separate EUR 2 handling fee per item category for all distance-sales consigments imported from outside the EU.

The reform is intended to address the rapid growth of low-value imports, improve product compliance and create a more level playing field for EU retailers. By increasing the cost of direct parcel shipments, the new regime encourages operators to import goods in bulk, hold inventory within the EU and fulfil orders locally, supporting demand for large-scale logistics facilities in Poland.



Chinese take-up in Q1-Q3 2026 exceeded all previous years combined

% of space leased by Chinese occupiers in Poland by time period



Source: Knight Frank

Why Poland?

Poland combines a strategic location, well-established warehouse infrastructure and competitive operating costs with the scale required by major Chinese e-commerce operators. As one of Europe's largest warehouse markets, it offers a substantial stock of modern logistics space and a broad range of facilities capable of accommodating large-volume distribution operations.
Its central location, proximity to both Western European and CEE markets, and extensive motorway and rail networks enable occupiers to serve multiple countries from large logistics platforms in Poland.

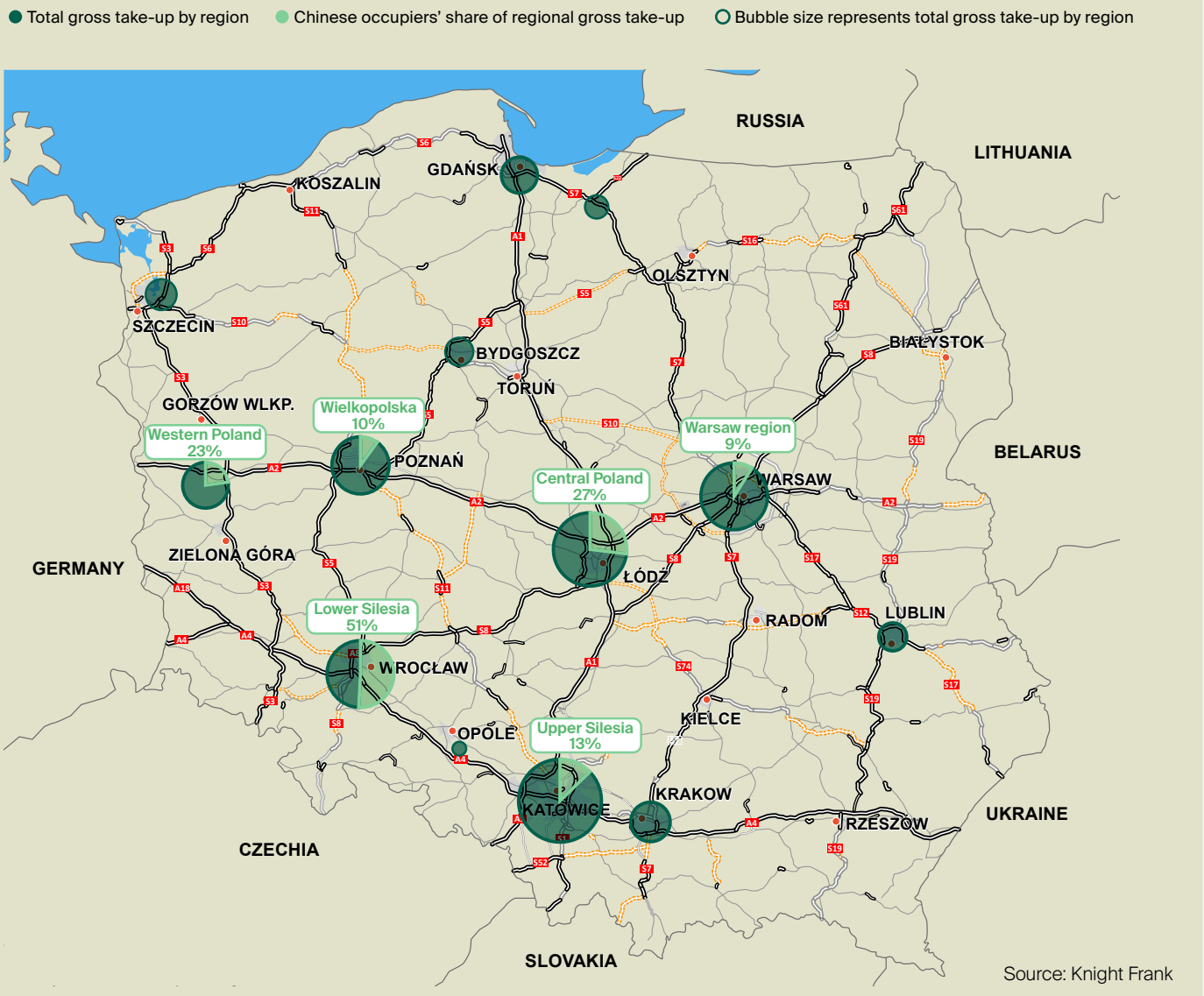
Lower Silesia attracted the initial wave of demand due to its proximity to Germany and the Czech Republic, as well as efficient transport links to Western Europe and the wider CEE region. The region remains the principal location for Chinese warehouse operations, accounting for approximately one million sq m, or 59% of the total space occupied by Chinese companies in Poland. Around 400,000 sq m was leased there in Q1–Q3 2026 alone.

As the availability of suitable large units in Lower Silesia declined, Chinese occupiers broadened their search to other major warehouse hubs. The strongest recent expansion was recorded in Central Poland, where Chinese operators leased approximately 232,000 sq m, all during Q3 2026. Their footprint also includes around 121,000 sq m in Upper Silesia, 116,000 sq m in the Warsaw region, 112,000 sq m in Western Poland and 90,000 sq m in the Poznań region.

This geographical diversification indicates that Chinese demand is no longer concentrated in a single logistics hub. It is increasingly influencing availability, leasing conditions and development activity across Poland's principal warehouse markets.

Chinese demand initially concentrated in Lower Silesia before expanding across other major logistics markets.

Chinese occupier demand across Poland's warehouse markets, Q1–Q3 2026



Source: Knight Frank

Transformative, but not yet structural

The influx of Chinese occupiers has contributed to a substantial tightening of warehouse availability. Poland's national vacancy rate declined from 7.4% at the end of 2025 to approximately 5.7% in Q3 2026. Vacancy stood at around 3.5% in both Lower Silesia and Central Poland, two markets with a significant concentration of Chinese demand.

Lower availability is strengthening landlords' negotiating position, limiting the scope for tenant incentives and creating conditions that may support effective rental growth. In locations with particularly strong Chinese demand, the limited availability of large units may also accelerate development discussions and increase interest in BTS projects.

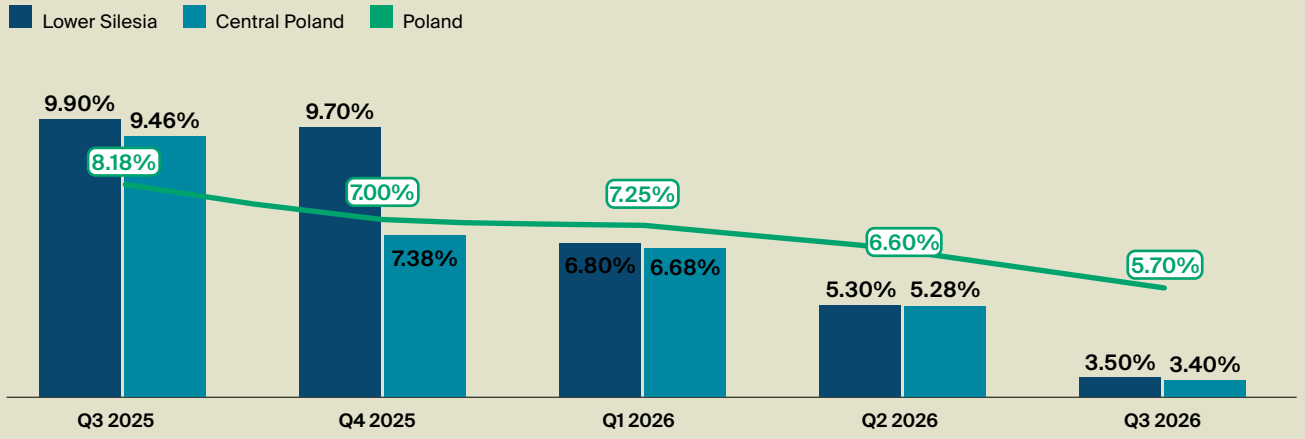
Despite its unprecedented scale, the current wave of Chinese demand cannot yet be regarded as structural. The expansion has been driven largely by changes to the EU customs framework, while many occupiers have initially committed to relatively short lease terms.

The durability of this demand will depend on the regulatory environment and the long-term viability of European fulfilment operations. Future changes to EU customs rules, weaker consumer demand or a shift in supply-chain strategies could reduce occupiers' space requirements. Chinese companies may also expand their logistics networks into other European countries offering more direct access to their principal consumer markets.

Consolidation represents an additional risk. The delivery of large BTS facilities could encourage some operators to relocate from several existing warehouses to a smaller number of major distribution hubs. This could return substantial volumes of space to the market and increase vacancy, particularly in locations with a high concentration of Chinese occupiers.

Chinese demand accelerated the decline in warehouse vacancy across the country

Vacancy rate in Poland and key locations for Chinese occupiers



Source: Knight Frank

Expert outlook

The current expansion has the potential to transform Poland's warehouse market, but its durability has yet to be proven. In the near term, Chinese occupiers will remain an important source of take-up and a major factor influencing vacancy, rental conditions and development strategies. Over the longer term, regulation, operational efficiency and occupiers' commitment to Poland will determine whether this demand becomes structural.

The long-term impact of Chinese demand will depend on whether operators establish permanent European distribution networks, invest in warehouse automation and commit to longer lease terms. Progress in these areas would indicate a transition from a regulation-driven demand wave to a more permanent component of Poland's logistics market.

DOROTA LACHOWSKA
DIRECTOR, HEAD OF RESEARCH

Contacts



Charles Taylor
CEO,
Head of Capital Markets
+48 722 202 030
charles.taylor@pl.knightfrank.com



Przemysław Piętak
Director,
Head of Industrial & Logistics Agency
+48 515 383 065
przemyslaw.pietak@pl.knightfrank.com



Michał Grabara
Director,
Head of Industrial & Logistics
+48 511 945 272
michal.grabara@pl.knightfrank.com

+48 22 596 50 50
www.KnightFrank.com.pl



Małgorzata Krzystek
Director, Head of Valuation & Advisory
+48 508 502 993
malgorzata.krzystek@pl.knightfrank.com



Dorota Lachowska
Director, Head of Research
+48 601 518 654
dorota.lachowska@pl.knightfrank.com

OUR REPORTS

Substantive preparation: Dorota Lachowska / Head of Research / Knight Frank
Szymon Sobiecki / Senior Analyst / Knight Frank
Graphic design: Karolina Chodak-Brzozowska / Art Director / PR & Marketing / Knight Frank

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