Warehouse market

H1 2026

The comprehensive guide to the warehouse market in Central Poland

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CENTRAL POLAND

Central Poland

H1 2026

Existing warehouse stock
5.2m sq m (+3.1% YoY)

Take-up (H1 2026)
570,000 sq m (+53.5% YoY)

New supply (H1 2026)
90,000 sq m (+25.2% YoY)

Supply under construction
160,000 sq m (-5.0% YoY)

Vacancy rate
5.3% (-3.8% YoY)

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

Central Poland remains the third-largest warehouse market in the country, after Warsaw and Upper Silesia. As of the end of Q2 2026, the region's total warehouse stock stood at 5.2m sq m, accounting for nearly 13.7% of Poland's total warehouse stock.

The region's central location and direct access to Poland's major transport corridors make it an attractive destination for logistics operators and retail chains, which continue to locate central warehouses and distribution centres here to serve nationwide distribution networks. An additional advantage is the region's strong connectivity to international transport routes, including the rail freight link between Łódź and Chengdu, China. Stryków, Łódź and Piotrków Trybunalski remain the region's key logistics hubs.

Over the past 12 months, warehouse stock in Central Poland increased by more than 3%. In H1 2026, developers delivered nearly 90,000 sq m of new warehouse space, more than 25% above the level recorded in the corresponding period of the previous year. Development completions were concentrated in Q2, when almost 63,000 sq m was delivered, including MLP Łódź (36,400 sq m) and DSV Łódź (26,400 sq m). Both schemes were fully pre-let upon completion.

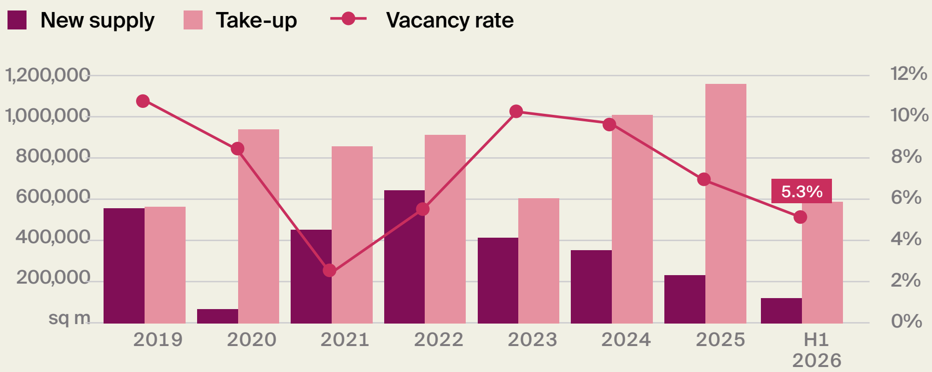
Development activity remains stable and largely driven by confirmed occupier demand. At the end of June, more than 160,000 sq m of warehouse space was under construction, with over 90% of the pipeline secured through pre-let agreements. The largest project underway was City Logistics Park Łódź V (38,600 sq m). During Q2, construction also started on nearly 40,000 sq m of additional warehouse space.

At the same time, take-up continues to follow an upward trend. In H1 2026, leasing transaction volume in Central Poland exceeded 570,000 sq m, representing an increase of more than 50% year-on-year. The largest transactions concluded between April and the end of June included the extension of the Panattoni BTS Castorama lease (101,600 sq m), a lease renewal at Marq Logistics Łódź III (36,600 sq m), and a new lease at Kutno Logistics Centre (26,000 sq m). In Q2 2026, lease renewals dominated the demand structure, accounting for 50% of total take-up, while new leases represented 40%, expansions 2% and sale-and-leaseback transactions 8%.

The vacancy rate stood at 5.3% at the end of Q2 2026, reaching its lowest level in four years. Year-on-year, the rate decreased by 3.8 pp, supported by persistently strong take-up and limited new supply, with the majority of newly delivered space entering the market with a significant level of pre-leasing secured.

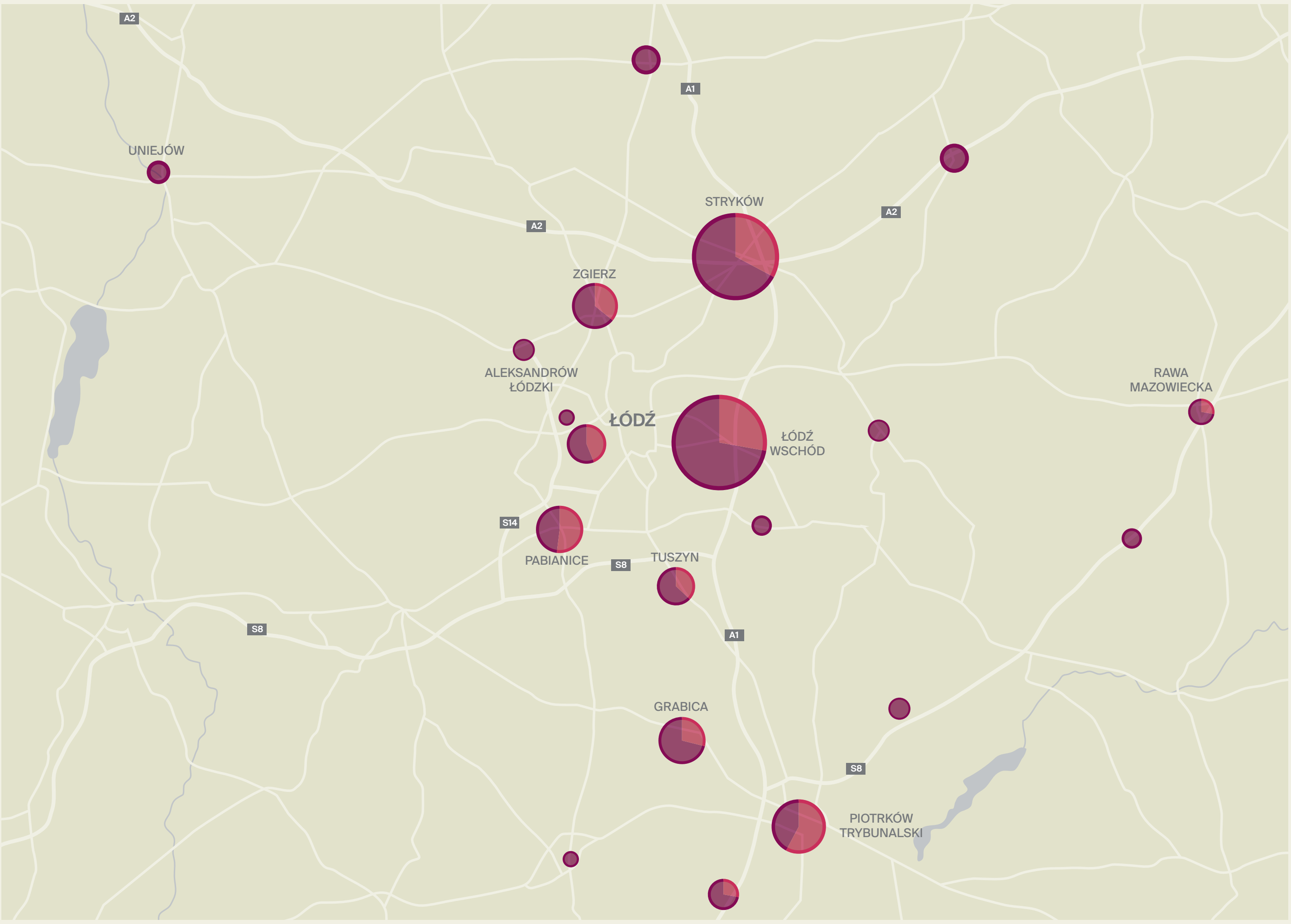
Asking rents remained stable quarter-on-quarter in Q2 2026.

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
1.55m sq m

2. Stryków
1.13m sq m

3. Grabica
330,000 sq m

4. Zgierz
290,000 sq m

5. Łódź West
240,000 sq m

Łódzkie Voivodeship

Population
2.3m

Voivodeship area
18,218 sq km

ECONOMIC DATA
(06.2026, STATISTICS POLAND)

Unemployment rate
6.5%

Average monthly salary
(enterprise sector)
PLN **8,500** (gross)

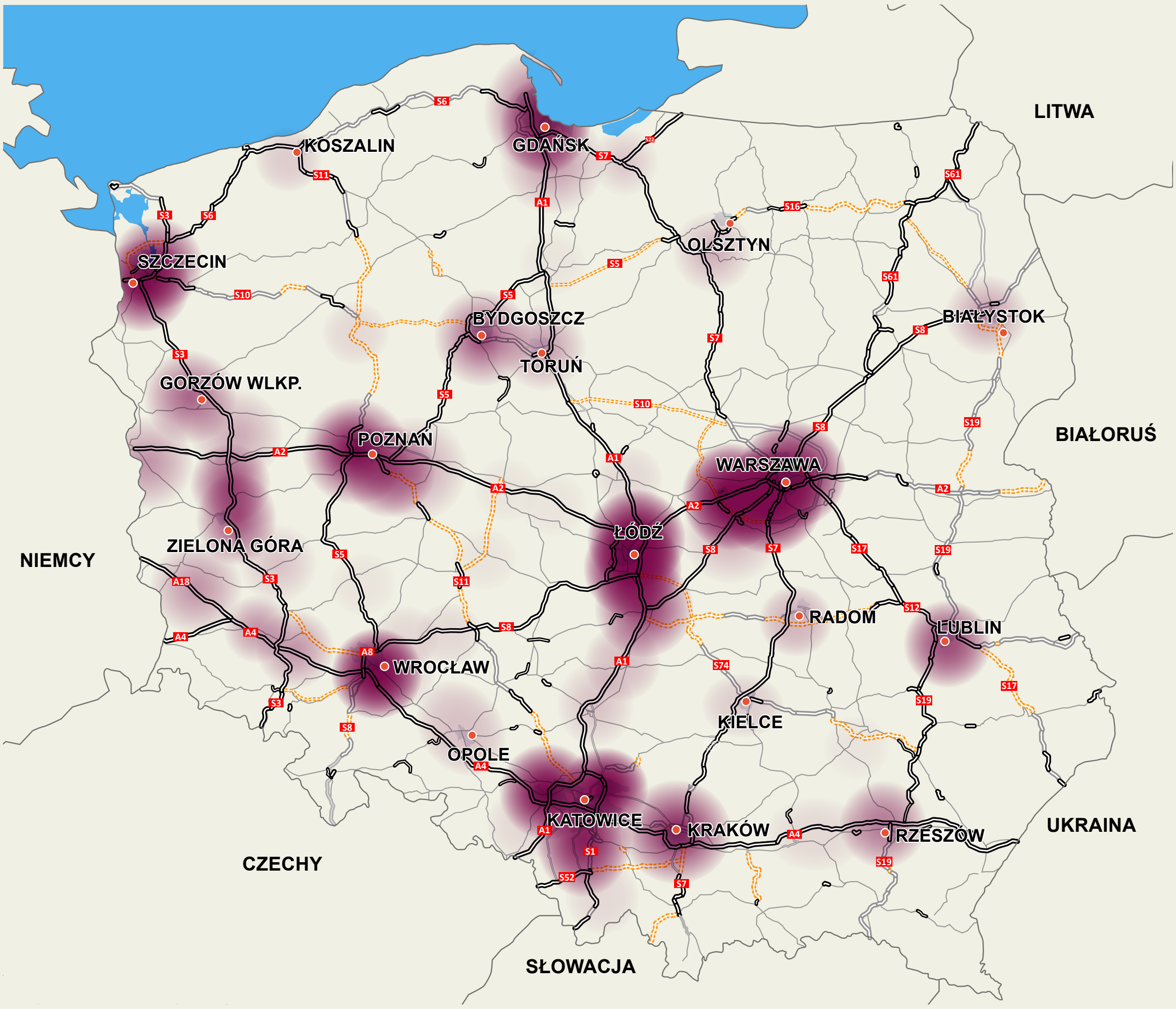
Average monthly salary
(transportation and storage sector)
PLN **8,700** (gross)

HIGH-SPEED ROADS

Highways
275 km
A1, A2

Expressways
250 km
S8, S14

Heat map of warehouse stock in Poland



Source: Knight Frank

High-speed roads
5,466 km

High-speed roads under construction
(Planned completion in 2026)
290 km

Intermodal terminals
45

Cargo ports
4

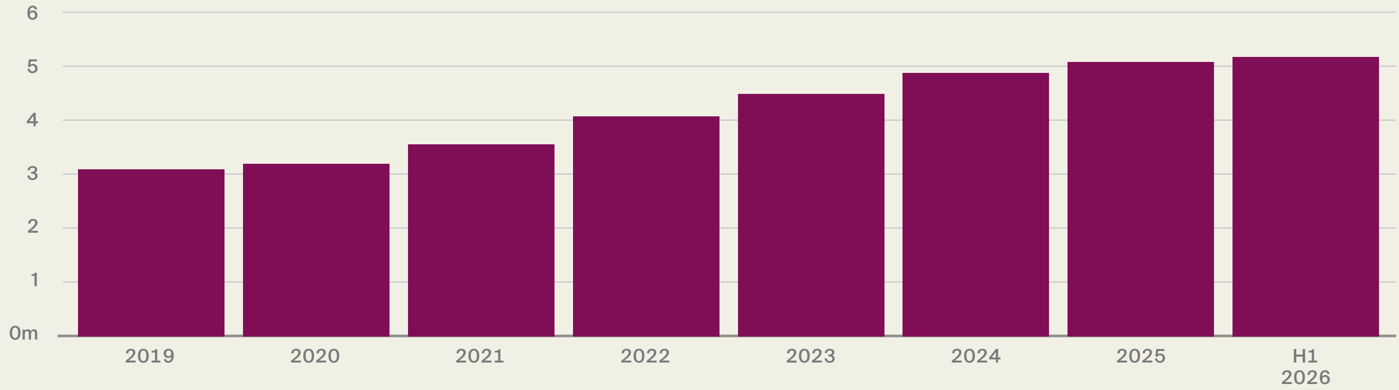
Cargo airports
7

Regional breakdown of Poland's warehouse market Q2 2026

Region	Existing stock (sq m)	Vacancy rate	New supply (sq m)	Under construction (sq m)	Take-up (sq m)	Asking rents (EUR/sq m/ month)	Unemployment rate	Average monthly salaries in transport and warehouse sector (PLN)
Warsaw area	7,580,000	7.5%	255,000	380,000	240,000	3.8-7.5	4.4%	9,250
Upper Silesia	6,340,000	7.3%	40,000	320,000	450,000	4.0-6.0	4.8%	9,400
Central Poland	5,190,000	5.3%	60,000	160,000	340,000	3.8-4.5	6.5%	8,700
Wrocław region	4,700,000	5.3%	105 000	12,000	300,000	4.0-4.7	5.5%	8,660
Poznań region	3,765,000	6.1%	0	130,000	220,000	3.8-4.5	3.7%	9,100
Tricity region	1,960,000	6.5%	0	65,000	65,000	3.8-4.5	5.3%	10,500
Szczecin region	1,430,000	2.3%	60,000	42,000	9,000	3.8-4.5	7.7%	10,300
Krakow region	1,200,000	5.1%	0	40,000	90,000	4.0-6.0	4.9%	8,550
Poland	**38,000,000**	**6.6%**	**580,000**	**1,300,000**	**930,000**	**3.8-7.5**	**5.8%**	**9,100**

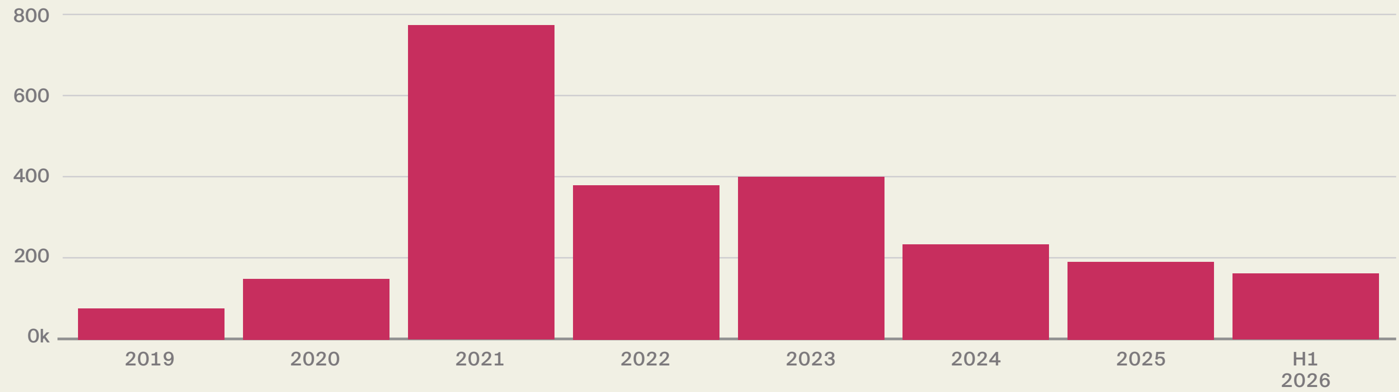
Nowoczesny rynek magazynowy w Polsce obejmuje osiem głównych obszarów koncentracji: Warszawę i okolice, Górny Śląsk, Polskę Centralną, Wielkopolskę, Dolny Śląsk, regiony Szczecina, Trójmiasta oraz Krakowa. Rozwijająca się infrastruktura transportowa oraz wymagający rynek pracy sprawiają, że w ostatnich latach deweloperzy coraz częściej wybierają lokalizacje poza głównymi hubami, np. w w zachodniej Polsce w pobliżu granicy z Niemcami, okolice Rzeszowa, Kielc czy Lublina, a także mniejsze rynki magazynowe, np. w regionie Kujaw.

Warehouse existing stock (sq m)



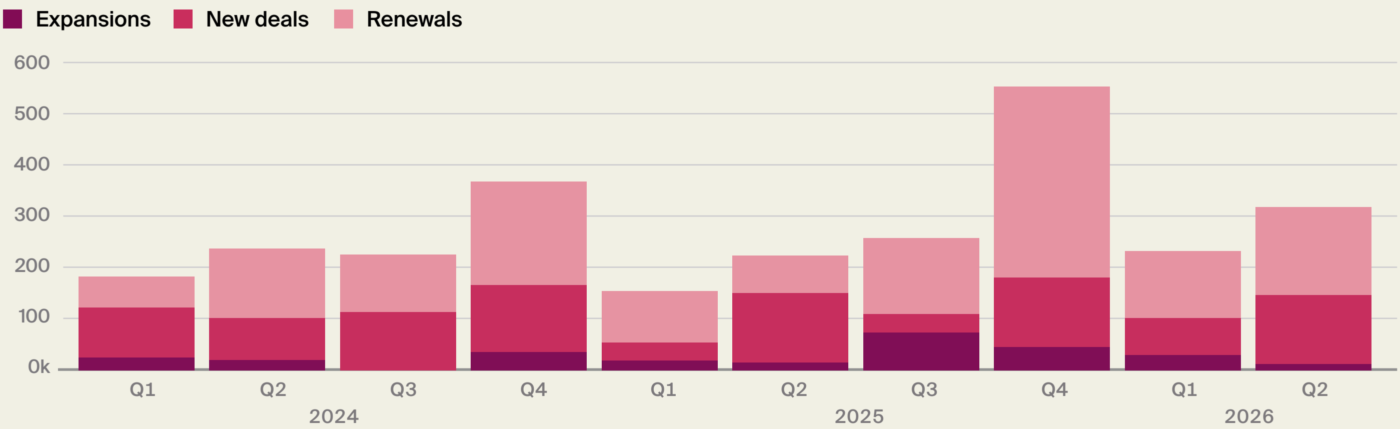
Source: Knight Frank

Supply under construction (sq m)



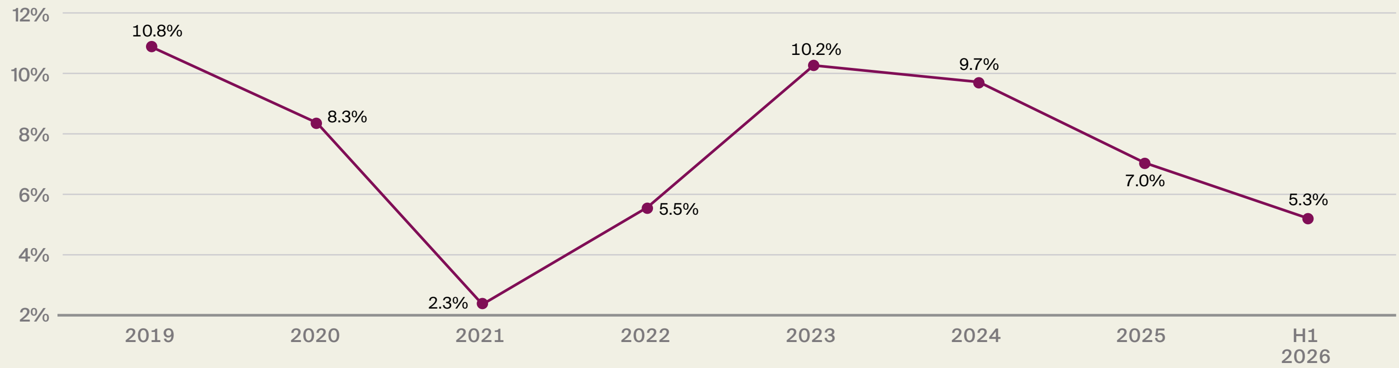
Source: Knight Frank

Take-up structure



Source: Knight Frank

Vacancy rate (%)



Source: Knight Frank

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