Warehouse market

H1 2026

The comprehensive guide to the warehouse market in Wrocław.

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WROCŁAW

Wrocław

H1 2026

Existing warehouse stock
4.7m sq m (+2.6% YoY)

Take-up
(H1 2026)
515,000 sq m (+23.5% YoY)

New supply
(H1 2026)
105,000 sq m (-64.1% YoY)

Supply under construction
12,000 sq m (-78.8% YoY)

Vacancy rate
5.3% (-4.3% YoY)

Standard lease terms in warehouse buildings

Asking rents for warehouse space
EUR/sq m/month
4.00-4.70

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 Wrocław region remains the fourth-largest warehouse market in Poland, benefiting from its strategic location near the country's western border and well-developed transport infrastructure, which provides convenient connections to Germany and the Czech Republic. An additional advantage is access to international logistics routes, including connections forming part of the New Silk Road, as well as the cargo terminal in Kąty Wrocławskie, which has been operational since 2020.

At the end of Q2 2026, the region's total warehouse stock stood at 4.7m sq m, accounting for 12.4% of Poland's total warehouse stock. The largest concentrations of warehouse schemes are located in the areas of Wrocław, Bielany Wrocławskie, Kąty Wrocławskie, Nowa Wieś Wrocławska, Polkowice and Pietrzykowice.

Over the past 12 months, warehouse stock in the Wrocław region increased by more than 2%. In H1 2026, developers delivered more than 105,000 sq m of new warehouse space; however, the volume of new supply was more than 64% lower than in the corresponding period of 2025. During the period under review, two warehouse halls were completed as part of Panattoni Park Campus 2, comprising 78,600 sq m and 26,500 sq m, respectively.

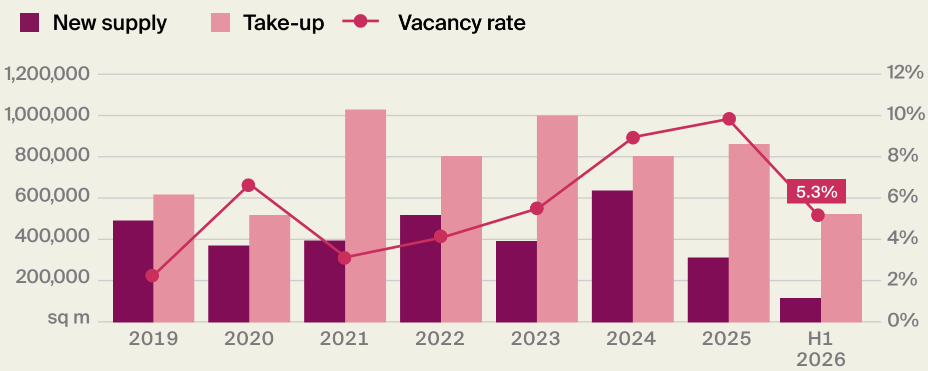
Development activity remains at a record low, with only 12,000 sq m of warehouse space currently under construction. The largest project under development was a warehouse hall within Segro Business Park Wrocław 2, comprising 5,900 sq m. In Q2, construction also commenced on halls within Multipark Wrocław (4,000 sq m) and KOTARBA INVEST Gajków (2,500 sq m).

At the same time, tenant activity in the region remains very strong. In the first half of the year, the Wrocław region strengthened its position as the leading location for Chinese e-commerce operators in Poland, contributing to a 23% year-on-year increase in leasing transaction volume. Total take-up exceeded 510,000 sq m in H1, while the largest transactions concluded in Q2 included new lease agreements at EQT Exeter Park Wrocław South III (52,000 sq m), Wrocław-Bielany Logistics Centre (40,800 sq m) and Hillwood Syców (31,500 sq m). New leases dominated the demand structure, accounting for 57% of total take-up, while lease renewals represented 42% and expansions 1%.

At the end of Q2 2026, the vacancy rate stood at 5.3%, declining by as much as 4.3 pp year-on-year and 1.5 pp quarter-on-quarter. This was one of the sharpest declines recorded among Poland's major warehouse markets over the past 12 months. The significant reduction in available space resulted from persistently strong take-up combined with record-low development activity and a limited number of projects being developed on a speculative basis.

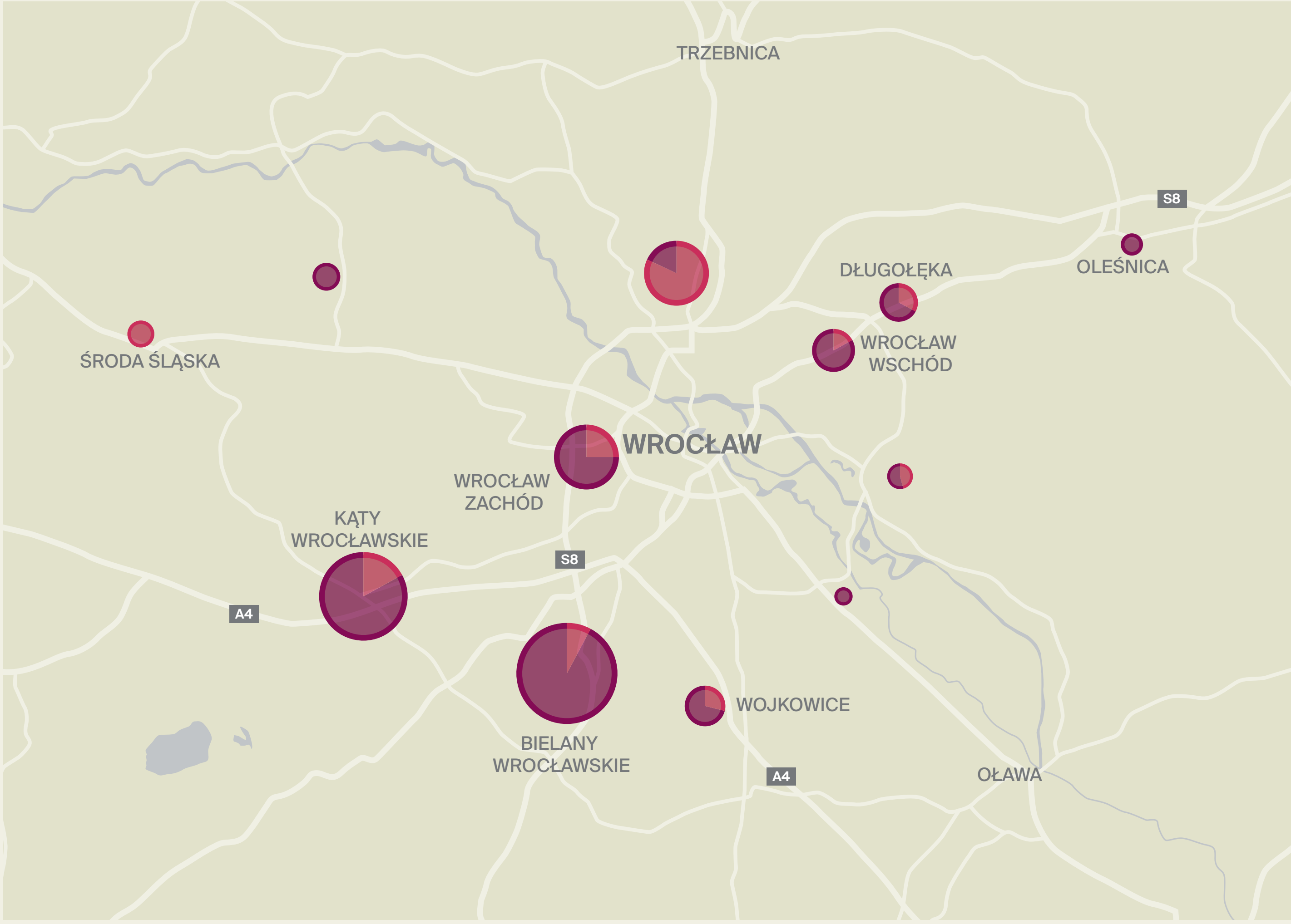
Asking rents remained stable quarter-on-quarter in Q2 2026.

New warehouse supply, annual take-up, vacancy rate in Lower Silesia



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. Bielany Wrocławskie
1.85m sq m

2. Kąty Wrocławskie
1.15m sq m

3. Wrocław West
510,000 sq m

4. Wojkowice
220,000 sq m

5. Wrocław East
200,000 sq m

Dolnośląskie Voivodeship

Population
2.9m

Voivodeship area
19,947 sq km

ECONOMIC DATA
(06.2026, STATISTICS POLAND)

Unemployment rate
5.5%

Average monthly salary
(enterprise sector)
PLN **10,600** (gross)

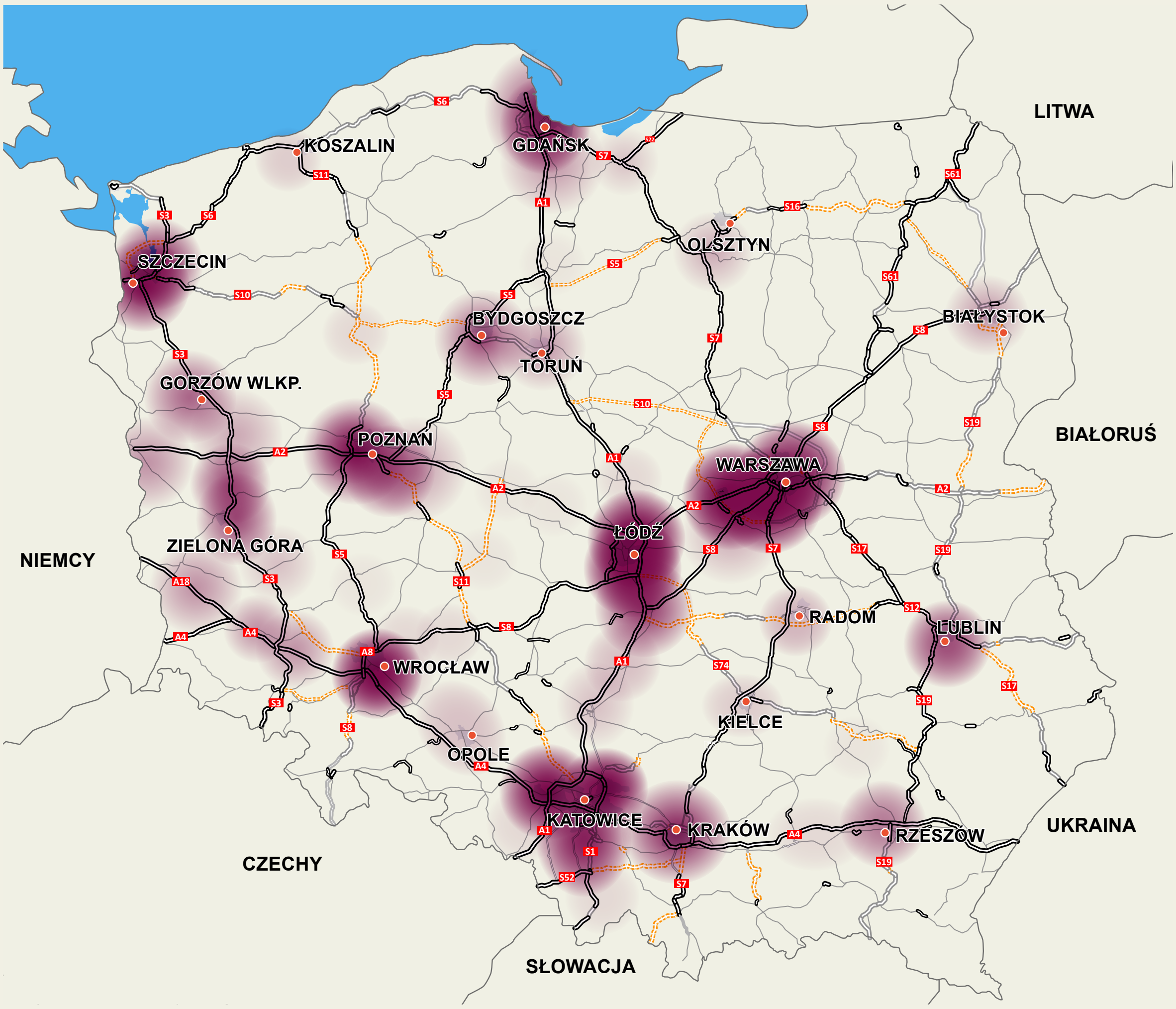
Average monthly salary
(transportation and storage sector)
PLN **8,700** (gross)

HIGH-SPEED ROADS

Highways
240 km
A4, A8, A18

Expressways
230 km
S3, S5, S8

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

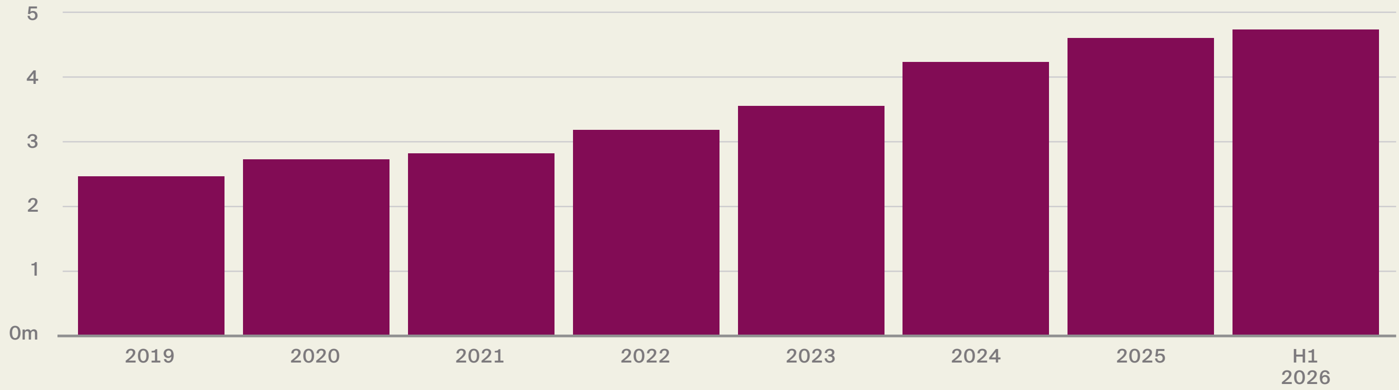
Cargo airports
7

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**

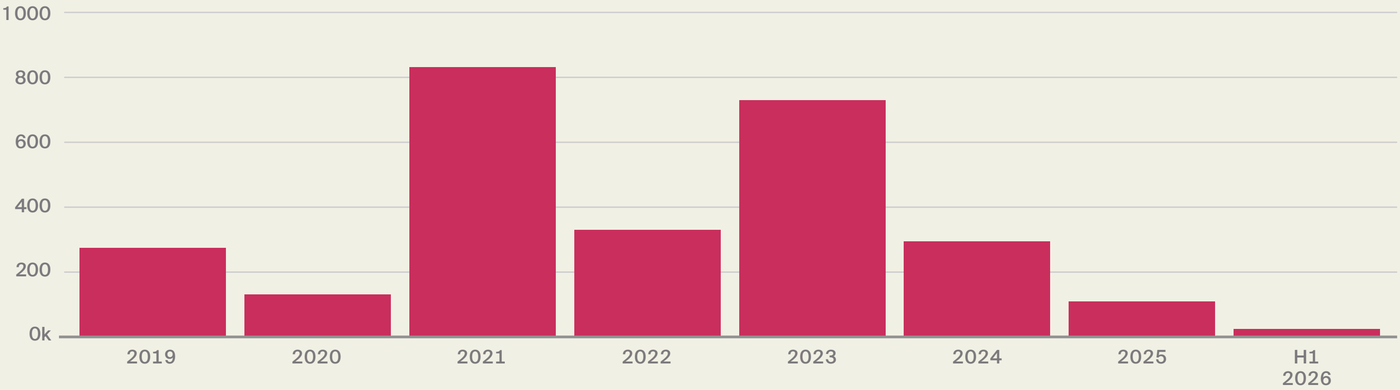
Nowoczesny rynek magazynowy w Polsce obejmuje osiem głównych obszarów koncentracji: Warszawę i okolice, Górny Śląsk, Polskę Centralną, Wielkopolskę, Dolny Śląsk, regiony Szczecina, Trójmiasta oraz Krakowa. Rozwijająca się infrastruktura transportowa oraz wymagający rynek pracy sprawiają, że w ostatnich 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)



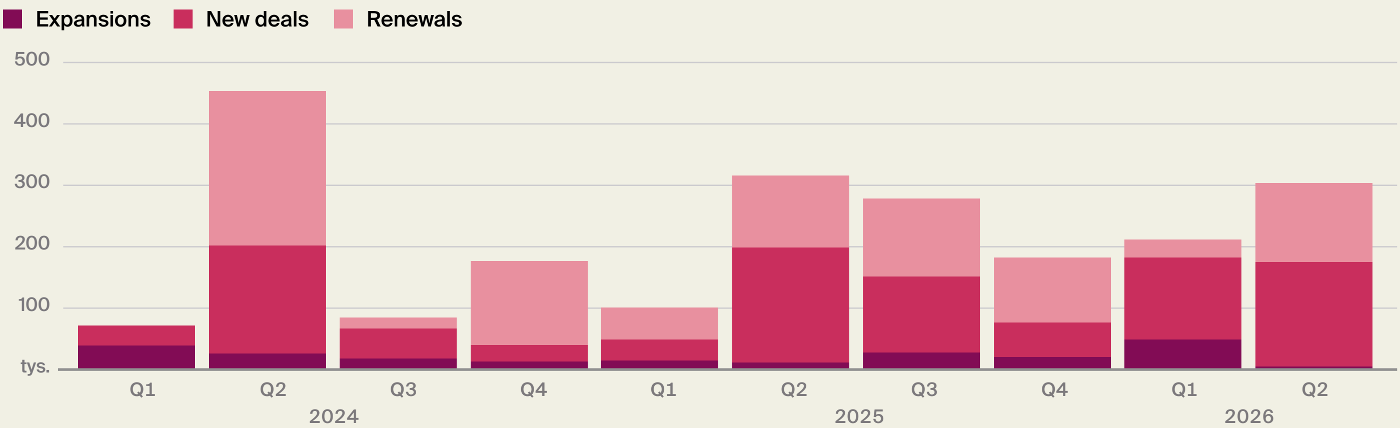
Source: Knight Frank

Supply under construction (sq m)



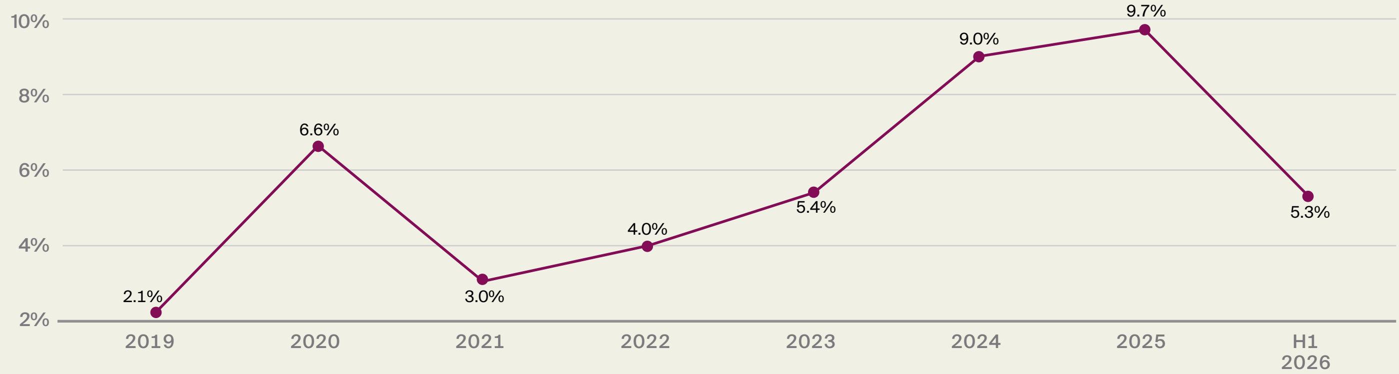
Source: Knight Frank

Take-up structure



Source: Knight Frank

Vacancy rate (%)



Source: Knight Frank

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
Monika Dybowska
monika.dybowska@pl.knightfrank.com

CAPITAL MARKETS
Michał Grabara
michal.grabara@pl.knightfrank.com

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

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