Warehouse market

H1 2026

The comprehensive guide to the warehouse market in Upper Silesia

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UPPER SILESIA

Upper Silesia

H1 2026

Existing warehouse stock
6.3m sq m (+3.1% YoY)

New supply (H1 2026)
140,000 sq m (-44.0% YoY)

Supply under construction
320,000 sq m (+60.8% YoY)

Take-up (H1 2026)
620,000 sq m (+21.0% YoY)

Vacancy rate
7.3% (+0.2% YoY)

Standard lease terms in warehouse buildings

Asking rents for warehouse space
EUR/sq m/month
4.00-6.00

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

Upper Silesia remains the second-largest warehouse market in Poland, after Warsaw region. The region's attractiveness is driven by its well-developed road infrastructure and strategic location in proximity to the Czech Republic, Germany and Slovakia, supporting the growth of the manufacturing and distribution sectors. At the end of Q2 2026, the region's total warehouse stock exceeded 6.3m sq m, accounting for 16.7% of Poland's total warehouse stock. The largest concentrations of warehouse space are located in Będzin, Chorzów, Czeladź, Tychy, Dąbrowa Górnicza, Gliwice and Sosnowiec, as well as around Bielsko-Biała.

Over the past 12 months, warehouse stock in Upper Silesia increased by more than 3%. In H1 2026, developers delivered more than 140,000 sq m of new warehouse space, representing a year-on-year decrease of nearly 44%. In Q2 alone, new supply was 70% lower than in the corresponding period of 2025 and more than 60% lower than in Q1 2026. During this period, only one scheme was completed: a warehouse hall within the Booster Zabrze by LemonTree project, comprising 40,800 sq m.

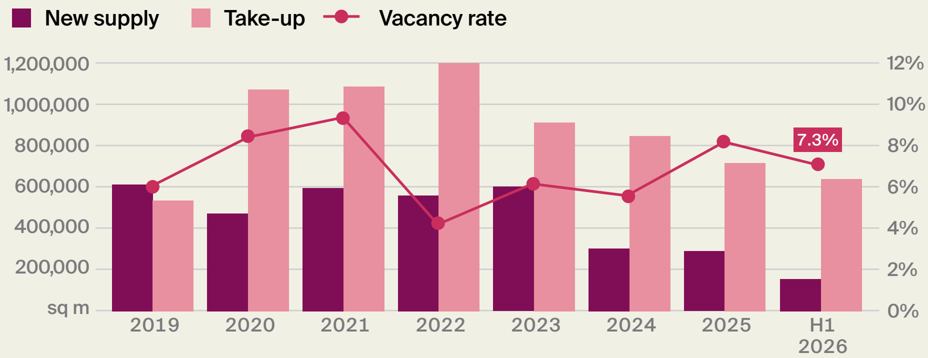
At the same time, development activity is gaining momentum. At the end of June 2026, nearly 320,000 sq m of warehouse space was under construction, almost 50% more than in the previous quarter. Notably, close to half of the pipeline remained speculative, one of the highest shares recorded across Poland, reflecting developers' strong confidence in the region's growth prospects. The largest project currently under construction is a project within Panattoni Park Katowice Airport, comprising 82,000 sq m.

Concurrently, take-up remains strong. In H1 2026, leasing transaction volume in Upper Silesia reached 620,000 sq m, representing an increase of nearly 21% year-on-year. The largest transactions concluded in Q2 included new lease agreements at Panattoni Park Bytom (100,000 sq m), Booster Zabrze by LemonTree (49,900 sq m) and Panattoni Park Gliwice III (46,300 sq m). New leases dominated the demand structure, accounting for 72% of total take-up. Lease renewals represented 27%, while expansions accounted for the remaining 1%.

The strong level of take-up has further reduced the availability of warehouse space. At the end of June 2026, the vacancy rate stood at 7.3%, representing a decrease of 1.1 pp quarter-on-quarter. The decline in the vacancy rate was driven by both strong take-up and the significant share of new leases in the transaction structure.

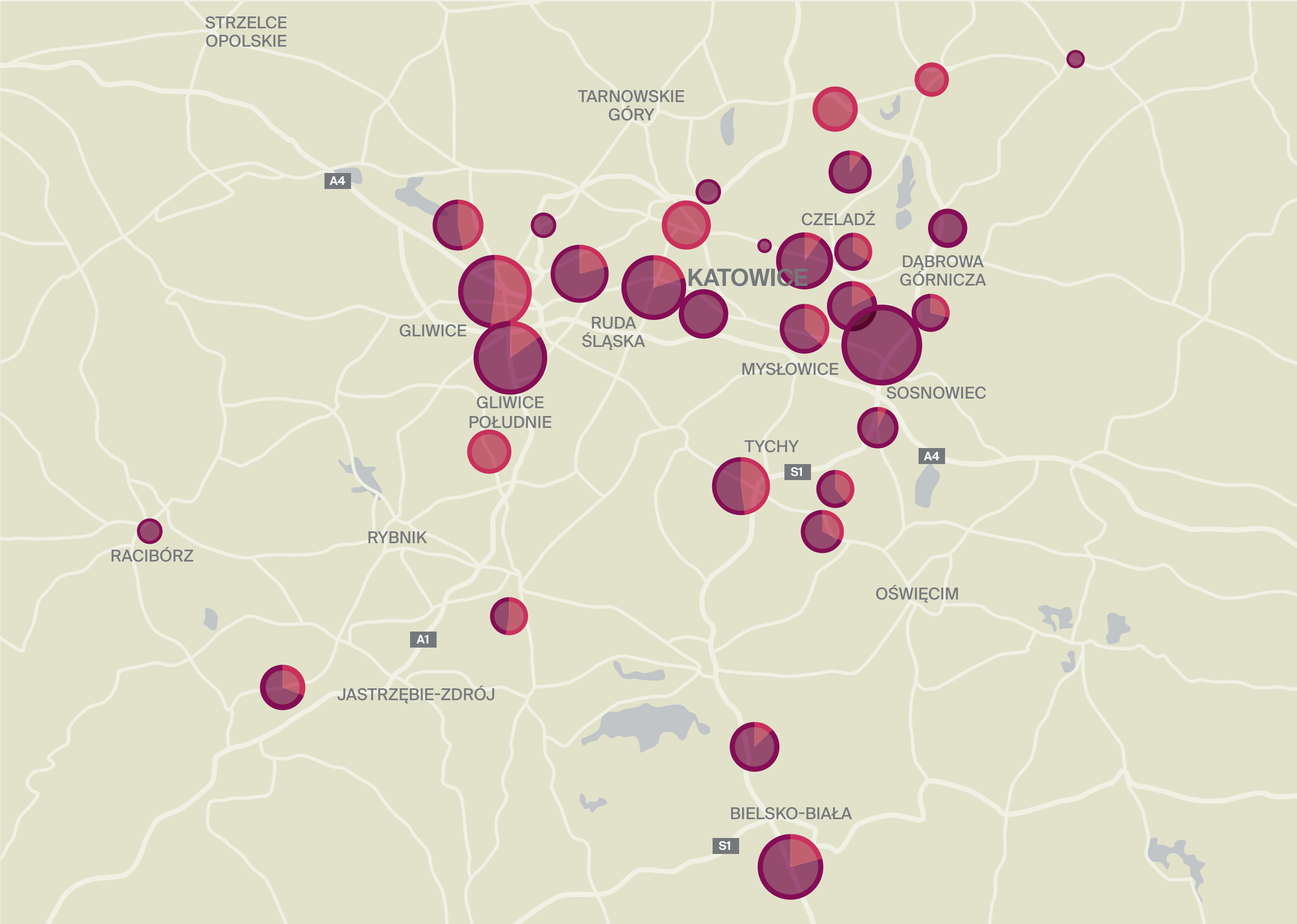
In Q2 2026, asking rents for warehouse space in Upper Silesia remained stable quarter-on-quarter.

New warehouse supply, annual take-up, vacancy rate in Upper 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. Sosnowiec South
650,000 sq m

2. Gliwice South
470,000 sq m

3. Ruda Śląska
430,000 sq m

4. Zabrze
430,000 sq m

5. Gliwice
320,000 sq m

Śląskie Voivodeship

Population
4.3m

Voivodeship area
12,334 sq km

ECONOMIC DATA
(06.2026, STATISTICS POLAND)

Unemployment rate
4.8%

Average monthly salary
(enterprise sector)
PLN **9,400** (gross)

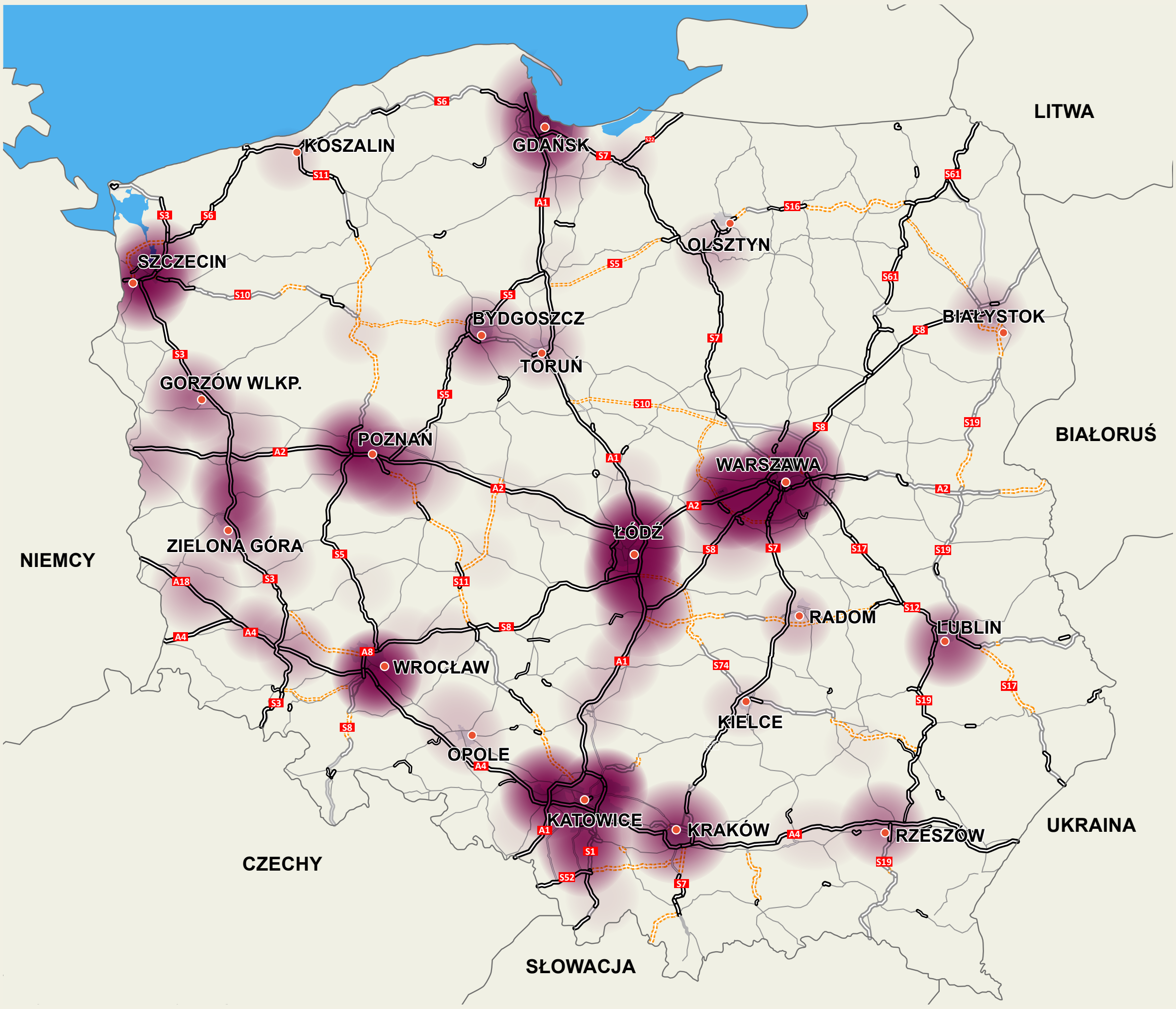
Average monthly salary
(transportation and storage sector)
PLN **9,400** (gross)

HIGH-SPEED ROADS

Highways
250 km
A1, A4

Expressways
130 km
S1, S52, S86

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

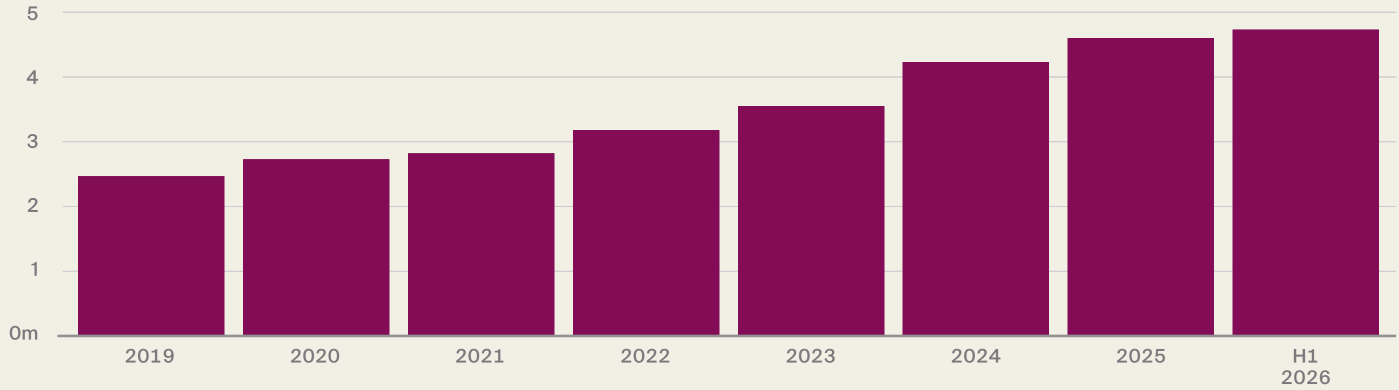
Cargo airports
7

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**

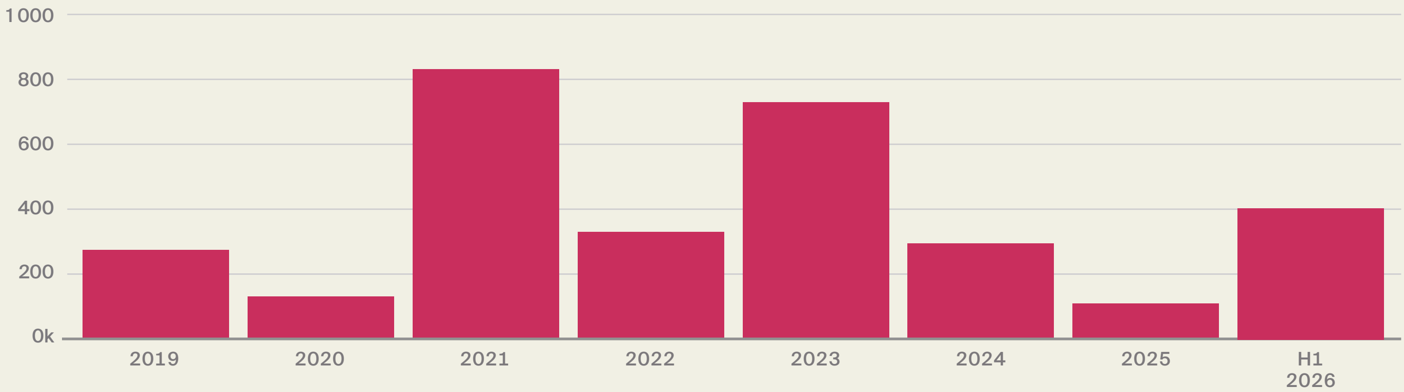
Nowoczesny rynek magazynowy w Polsce obejmuje osiem głównych obszarów koncentracji: Warszawę i okolice, Górny Śląsk, Polskę Centralną, Wielkopolskę, Dolny Śląsk, regiony Szczecina, Trójmiasta oraz Krakowa. Rozwijająca się infrastruktura transportowa oraz wymagający rynek pracy sprawiają, że w ostatnich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



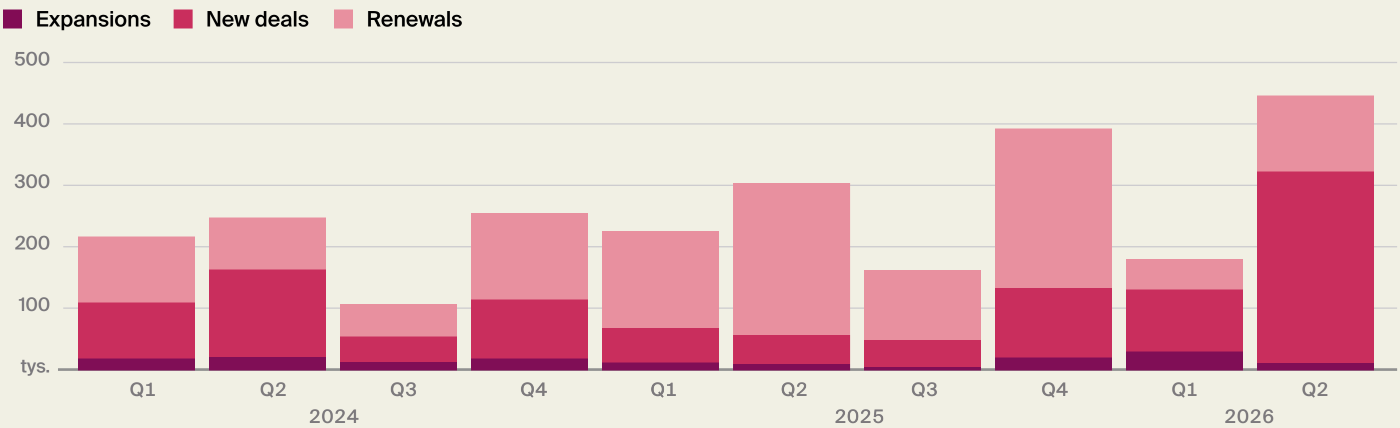
Source: Knight Frank

Supply under construction (sq m)



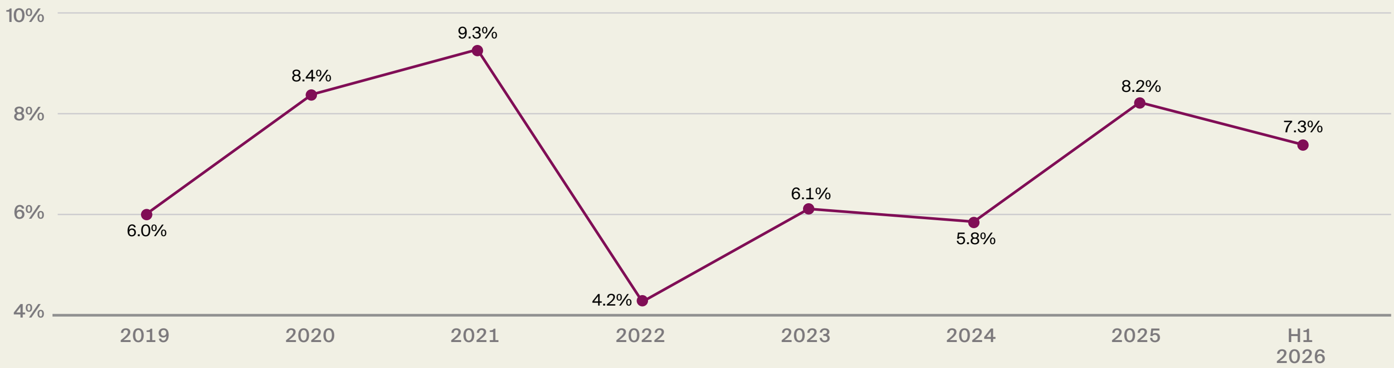
Source: Knight Frank

Take-up structure



Source: Knight Frank

Vacancy rate (%)



Source: Knight Frank

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