Warehouse market

H1 2026

The comprehensive guide to the warehouse market in Wielkopolska

knightfrank.com.pl/en/research

WIELKOPOLSKA

Wielkopolska

H1 2026

Existing warehouse stock
3.8m sq m (+5.7% YoY)

New supply
(H1 2026)
35,000 sq m (-50.4% YoY)

Supply under construction
130,000 sq m (+58.5% YoY)

Take-up
(H1 2026)
520,000 sq m (+108.7% YoY)

Vacancy rate
6.1% (-2.6% 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

Wielkopolska is the fifth-largest warehouse market in Poland, following Warsaw, Upper Silesia, Central Poland and Lower Silesia. The region's attractiveness is underpinned by its strategic location, direct access to the A2 motorway and close proximity to the German border, facilitating both domestic and international distribution operations. Additional strengths include access to a skilled labour pool and the growing role of Poland as a destination for nearshoring and business relocation processes undertaken by Western European companies. As a result, the region continues to attract strong occupier interest, particularly from the automotive and logistics sectors. At the end of Q2 2026, the total warehouse stock in Wielkopolska stood at 3.8m sq m, accounting for 9.9% of Poland's total warehouse stock. The largest concentrations of warehouse space are located in the areas of Swarzędz, Tarnowo Podgórne, Gądki and Komorniki.

In H1 2026, approximately 35,000 sq m of new warehouse space was delivered to the market, representing a year-on-year decrease of more than 50%. No new warehouse project was completed in Q2 alone. New supply in the first half of the year comprised two projects: MLP Poznań West, with 32,900 sq m, and the Kostrzyn Logistics and Warehouse Centre, with 1,750 sq m, both of which obtained occupancy permits in Q1 2026.

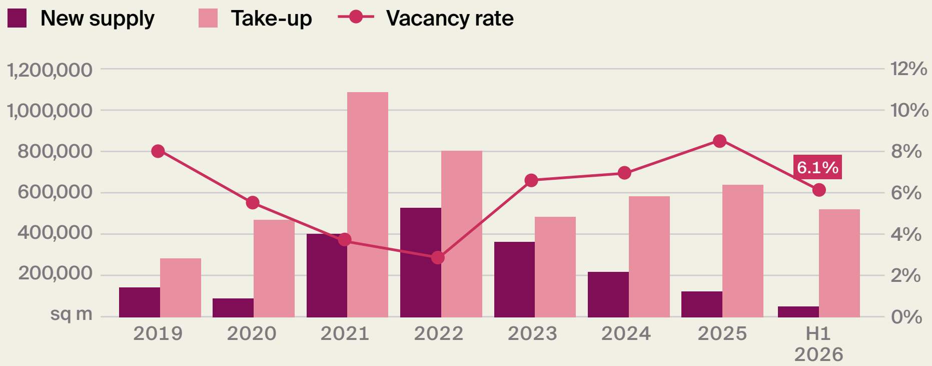
Development activity in the region remains moderate. At the end of June 2026, around 130,000 sq m of warehouse space was under construction, with Panattoni Park Poznań East III (46,000 sq m) the largest project in the pipeline. The scheme was also the only project to break ground during the period under review. New leases accounted for an overwhelming 92% of total demand, with renewals making up the remaining 8%, underscoring the market's ability to attract new occupiers and support further logistics and industrial expansion.

In H1 2026, leasing activity in Wielkopolska exceeded 520,000 sq m. Despite a quarterly slowdown in activity, take-up remained strong in Q2, reaching more than 218,000 sq m, representing a 23% year-on-year increase. The largest transactions concluded between April and the end of June included new lease agreements at EQT Exeter Poznań Żerniki I (107,800 sq m), Hillwood Poznań-Czempiń (34,200 sq m) and BGO Poznań (15,600 sq m). New leases clearly dominated the demand structure, accounting for 92% of total take-up, while renewals represented the remaining 8%. Such a high share of new lease agreements confirms the region's continued attractiveness for new logistics and manufacturing developments.

The vacancy rate stood at 6.1% at the end of Q2 2026, representing a decrease of 1.9 pp quarter-on-quarter and 2.6 pp year-on-year. The decline in the vacancy rate resulted from strong take-up combined with limited new supply.

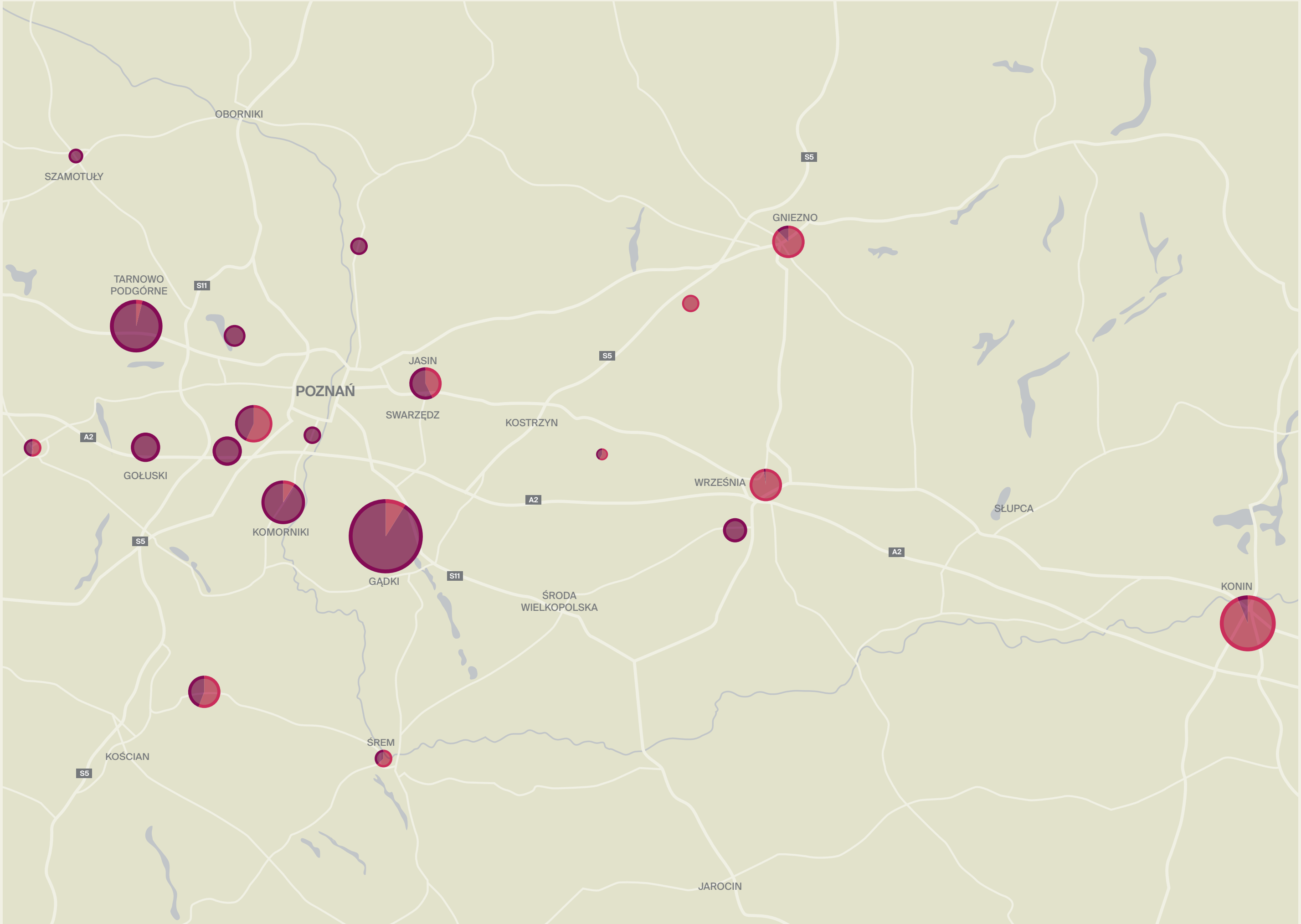
Asking rents remained stable quarter-on-quarter in Q2 2026.

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
270,000 sq m

Wielkopolskie Voivodeship

Population
3.5m

Voivodeship area
29,827 sq km

ECONOMIC DATA
(06.2026, STATISTICS POLAND)

Unemployment rate
3.7%

Average monthly salary
(enterprise sector)
PLN **8,400** (gross)

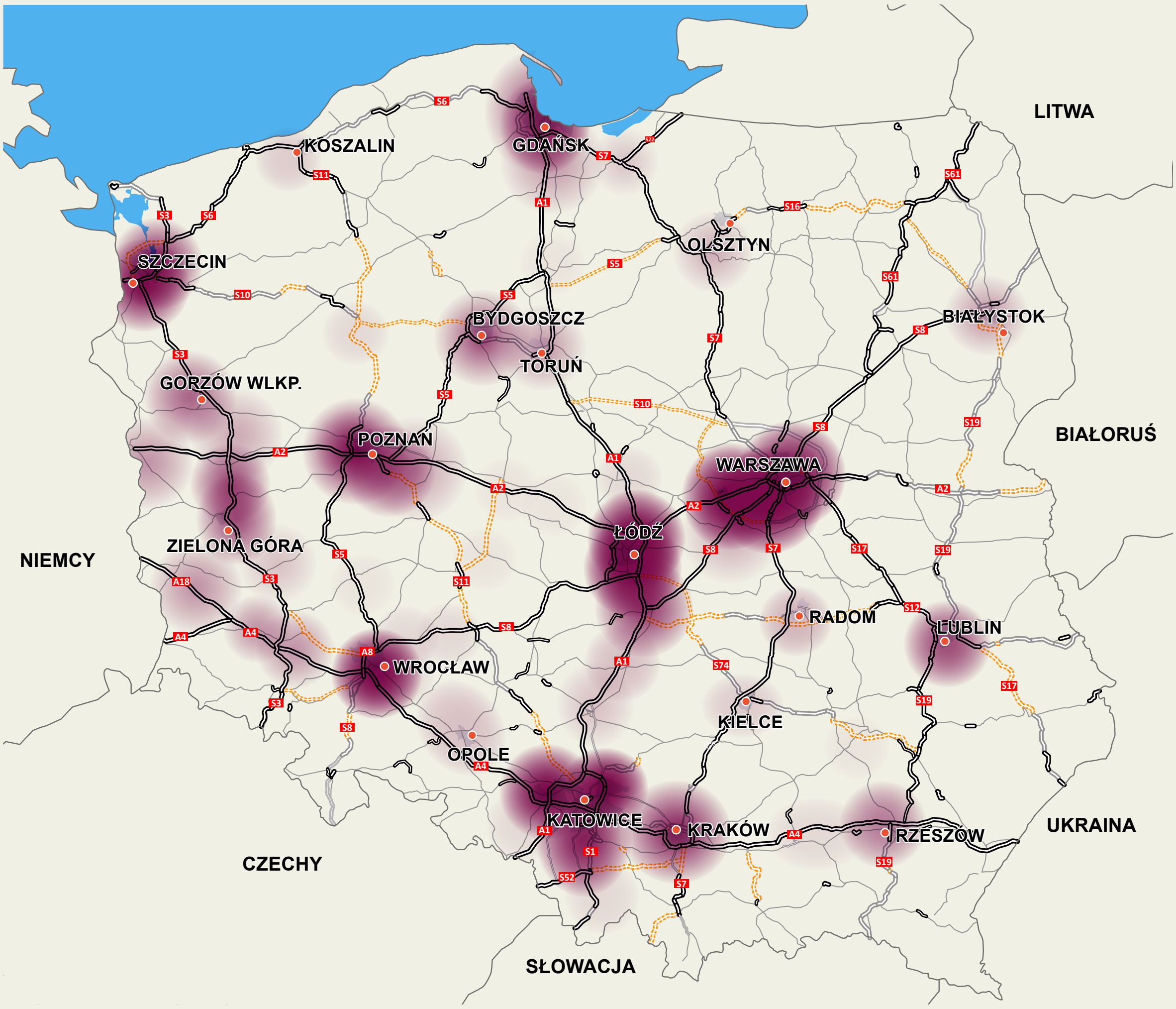
Average monthly salary
(transportation and storage sector)
PLN **9,100** (gross)

HIGH-SPEED ROADS

Highways
210 km
A2

Expressways
275 km
S5, S8, S10, S11

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

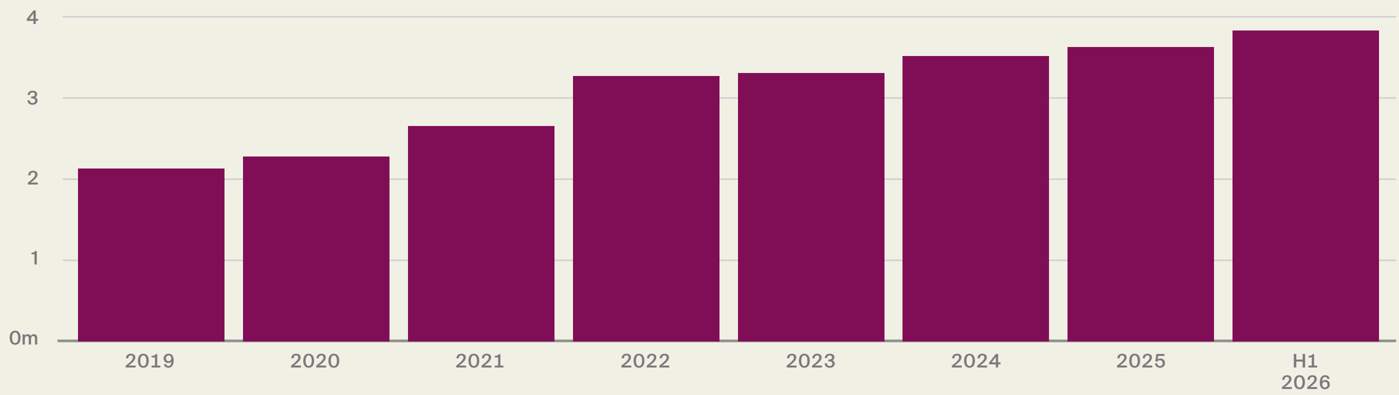
Cargo airports
7

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**

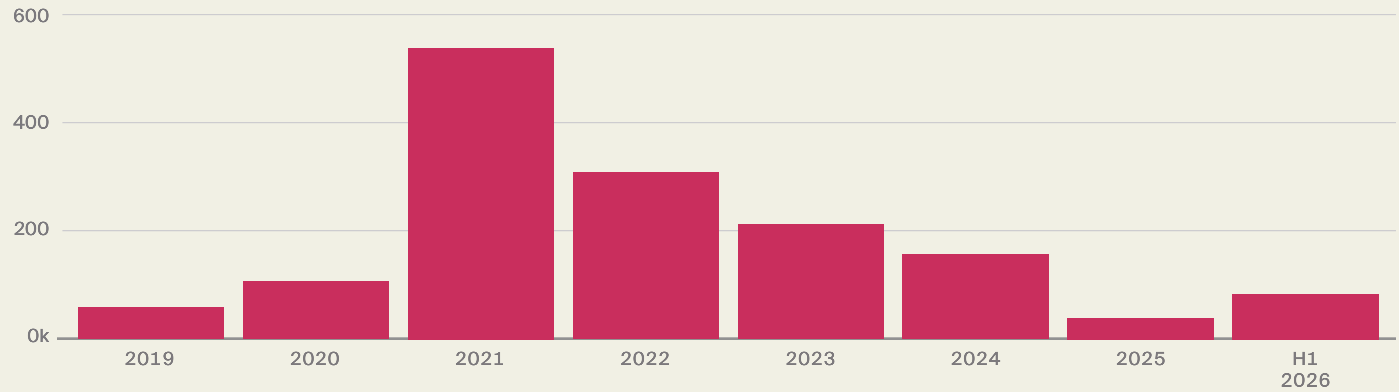
Nowoczesny rynek magazynowy w Polsce obejmuje osiem głównych obszarów koncentracji: Warszawę i okolice, Górny Śląsk, Polskę Centralną, Wielkopolskę, Dolny Śląsk, regiony Szczecina, Trójmiasta oraz Krakowa. Rozwijająca się infrastruktura transportowa oraz wymagający rynek pracy sprawiają, że w ostatnich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



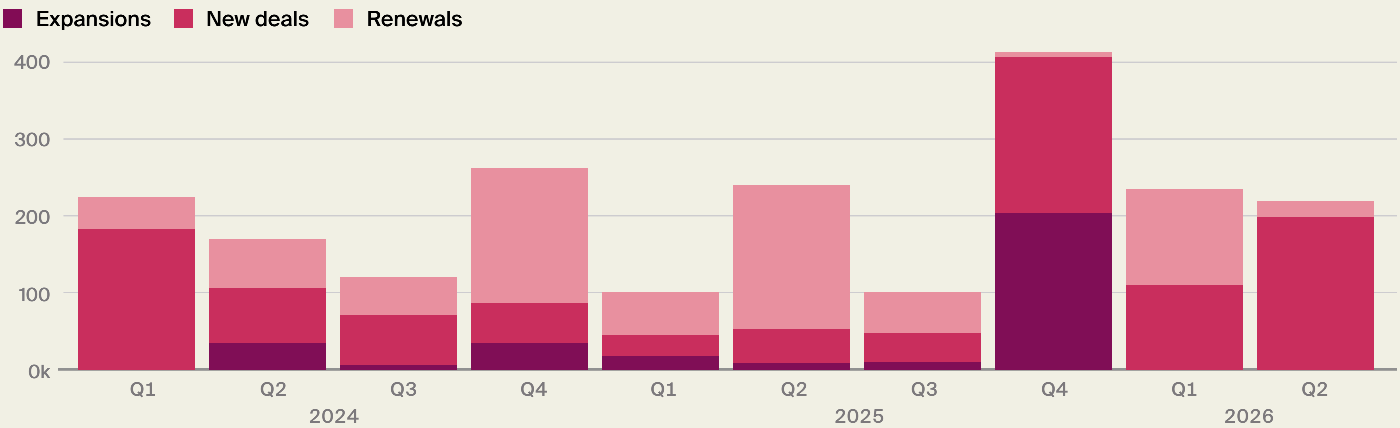
Source: Knight Frank

Supply under construction (sq m)



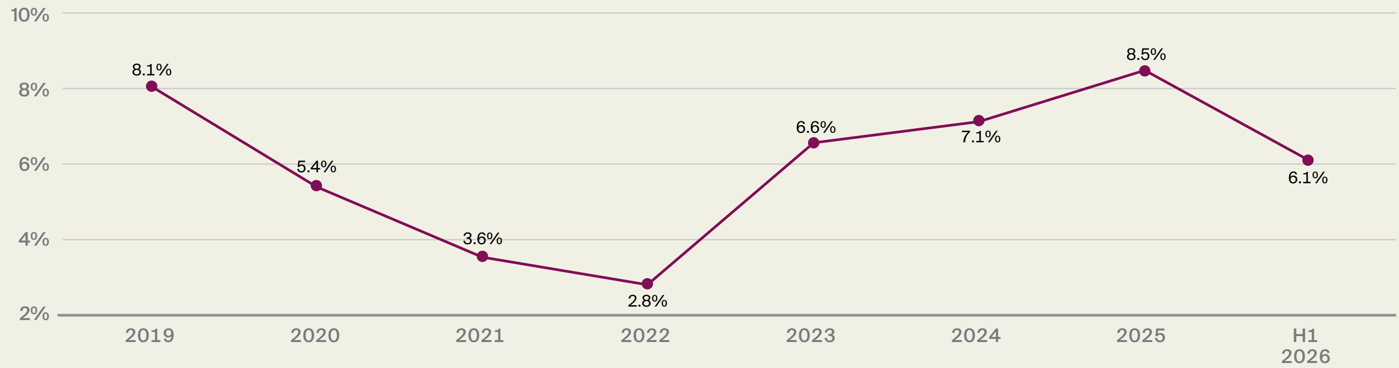
Source: Knight Frank

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
Natalia Mika
natalia.mika@pl.knightfrank.com

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

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

As one of the largest and most experienced research teams operating across Polish commercial real estate markets, Knight Frank Poland provides strategic advice, forecasting and consultancy services to a wide range of commercial clients including developers, investment funds, financial and corporate institutions as well as private individuals. We offer:

- strategic consulting, independent forecasts and analysis adapted to clients' specific requirements,
- market reports and analysis available to the public,
- tailored presentations and market reports for clients.

Reports are produced on a quarterly basis and cover all sectors of commercial market (office, retail, industrial, hotel) in major Polish cities and regions (Warsaw, Kraków, Łódź, Poznań, Silesia, Tricity, Wrocław, Lublin, Szczecin) and PRS sector in Poland. Long-term presence in major local markets has allowed our research team to build in-depth expertise of socio-economic factors affecting real estate market in Poland.

Knight Frank Research
Reports are available at

Substantive preparation: Szymon Sobiecki / Research / Knight Frank

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