

Poznań Office Market



Solid pipeline, sole new supply

Poznań with 678,100 sq m of modern office space is a medium-sized office market among regional cities. Poznań ranks between Katowice and Łódź, positioning it as the fifth largest office market in the country (including Warsaw). The office market has been divided into zones: the largest is the City Centre, which accounts for approximately 44% of supply, followed by the West with a 30% share, and smaller zones such as the East (14%), North, and South (7% and 5% respectively).

In H1 2025, Poznań was the only regional city to record new supply was recorded, amounting to 2,400 sq m in the Dymka 188 building by Dom Medialny Święty Wojciech. This followed the addition of just 2,600 sq m in 2024, delivered through the Wujka 9 office building.

Currently four projects with a total area of 52,600 sq m are under construction in the city, which is the second highest (after Kraków) development activity among regional office markets. Two of the projects, Bukowska 144 and Górecka Park, totalling 5,500 sq m, are expected to complete in 2025. Over 70,000 sq m of new office space is anticipated to be delivered between 2026 and 2027. A significant portion of this, over 47,000 sq m, is already under construction in projects such as AND2 by Von Der Heyden Group and Industrial by TMT. Additionally, Skanska Property Poland's Nowy Rynek C is in an advanced planning stage, further contributing to the pipeline.

In H1 2025, the city accounted for 8% of national leasing activity, placing it between Tricity (14%) and Katowice (6%). Total leasing activity reached 32,100 sq m, representing a 4% increase compared to H1 2024. Quarterly performance saw approximately 14,500 sq m leased in Q1, with demand rising to 17,600 sq m in Q2. Nearly all of this demand was concentrated within three key zones: the City Centre (43%), West (28%), and East (26%). The remaining zones collectively accounted for around 4% of all activity.

Demand in H1 2025 was largely shaped by renegotiations, which secured a 47% share. New leases contributed 42%, expansions 6%, and pre-lets 5%. For context, H1 2024 saw renegotiations at 42%, new leases at 48%, expansions at 6%, and pre-lets at 4%.

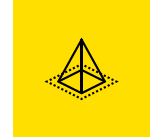
At the end of H1 2025, the total availability of office space in Poznań reached 100,500 sq m, resulting in a vacancy rate of 14.8%. This represents a 90 bps increase y-o-y. The majority of this vacant space (85%) is concentrated within the West (44,600 sq m) and City Centre (40,500 sq m) zones. The remaining vacancy is distributed across the East (10%), South (4%), and North (1%) zones. Of the 105,000 sq m delivered between 2020 and H1 2025, 17,000 sq m remains unoccupied, accounting for 17% of the city's total vacancy.

Net absorption in H1 2025 was negative, at -7,700 sq m, compared to nearly 5,000 sq m in H1 2024.

Rents for new A-class office properties are currently holding steady at EUR 13.00-17.00/sq m/month, a level maintained since modest increase at the start of 2024. Market is also seeing a distinct trend where enhanced incentive packages are becoming more common, which landlords are balancing out with correspondingly higher headline rents. While some ongoing developments list asking rents above this range - occasionally reaching EUR 19.00 - these are typically outliers and not reflective of the broader market.

Besides rent, tenants are also responsible for service charges, which typically range from PLN 20.00 to PLN 35.00/sq m/month in well-maintained and managed properties.

Key office data H1 2025:



678,100 sq m
Total office supply



52,600 sq m
Total space under construction
(5% down y-o-y)



2,400 sq m
New supply
(24,100 sq m in 2024)



14.8%
Vacancy rate
(90 bps up y-o-y)

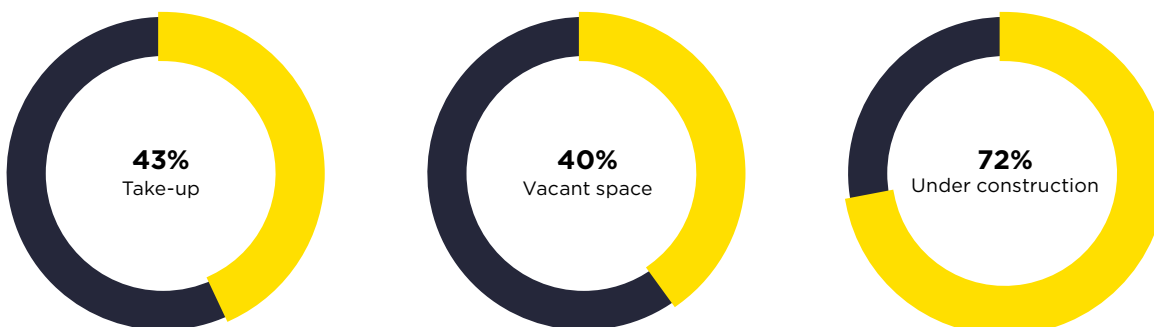


32,100 sq m
Total take-up
(4% up y-o-y)



-7,700 sq m
Net absorption
(11,100 sq m in 2024)

City Centre compared to the city



Source: Savills Research

Poznań key data:



Population
536,200
December 2024



Average salary
PLN 10,100
May 2025



GDP growth
3.2%/3.6%
2024/2025 (f)



Unemployment rate
1.2%
May 2025



Number of students
99,430
2023/2024



Number of graduates
23,770
2023/2024



**Number of
BPO/SSC centers**
167
June 2025



**BPO/SSC
employment**
30,500
June 2025

Source: Statistics Poland, Oxford Economics, ABSL 2025

Trends for the following quarters:

01

Upward pressure for rents

due to limited new supply and high fit-out costs

02

Shrinking transaction size

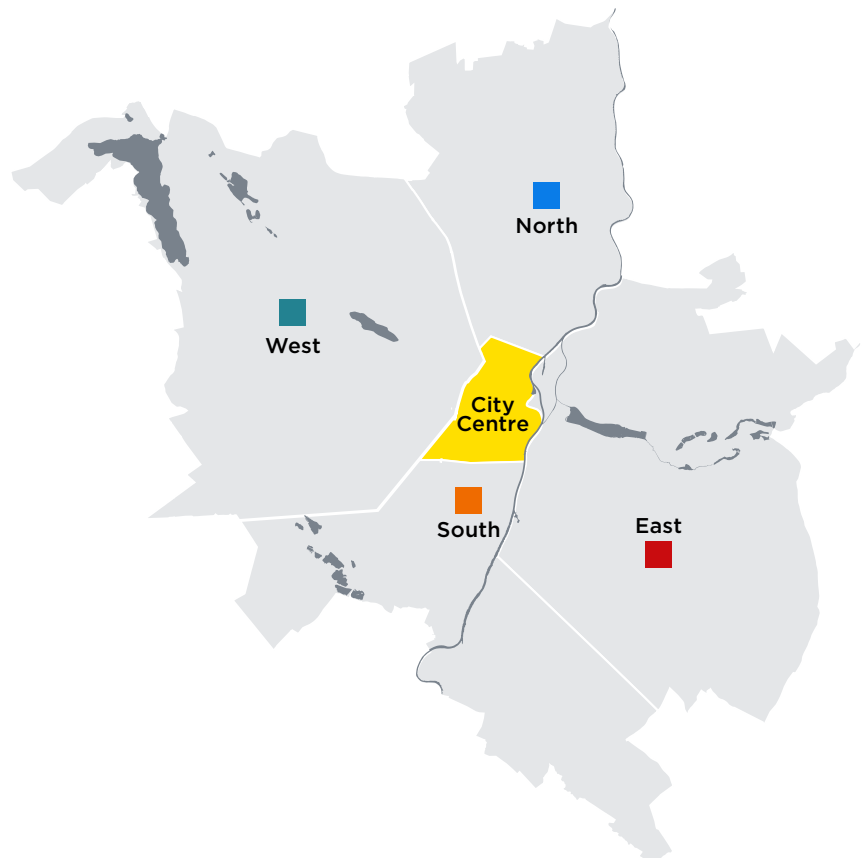
increased demand for 500-1,000 sq m offices

03

Prime location, prime standard

limited supply reflected in higher interest of prime properties

Poznań office zones



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