FIGURES | OFFICE | Q2 2026

Poland - Wroclaw

Key Performance Indicators

Prime Yield
7,50%
Expected Investment Returns
Change YonY: 0 bps

Prime Rent
€ 16,75
Monthly, per sq m
Change YonY: 4,7%

Average Rent
€ 15,20
Monthly, per sq m
Change YonY: 0,5%

Office Investment Volume
€ -
In Wroclaw during Q2 2026
€ 62M (Rolling 12 months)

Take Up
13K
Square Meter
23K Year2Date

Vacancy Rate
21,76%
Percentage of Stock vacant
Change YonY: 127 bps

Completions
-
Square Meter
24K Year2Date

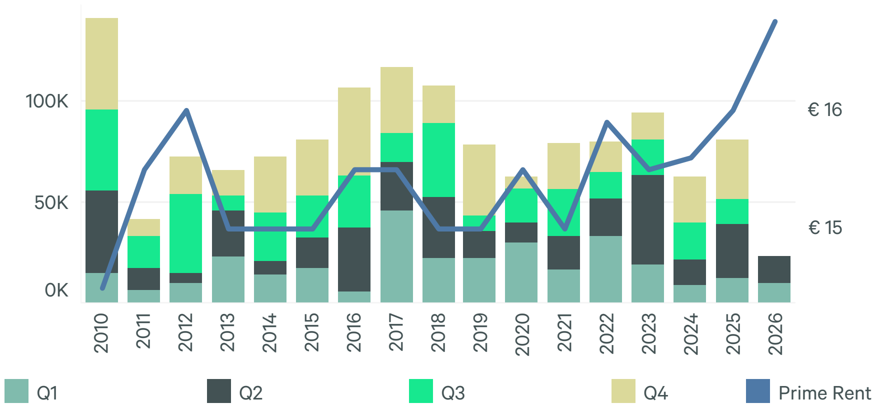
Total Stock
1 354K
Square Meter
1 059K Occupied Stock

(Forecast) Completions
24K (2026)
Square Meter
0 (2027) // 67 700 (2028)

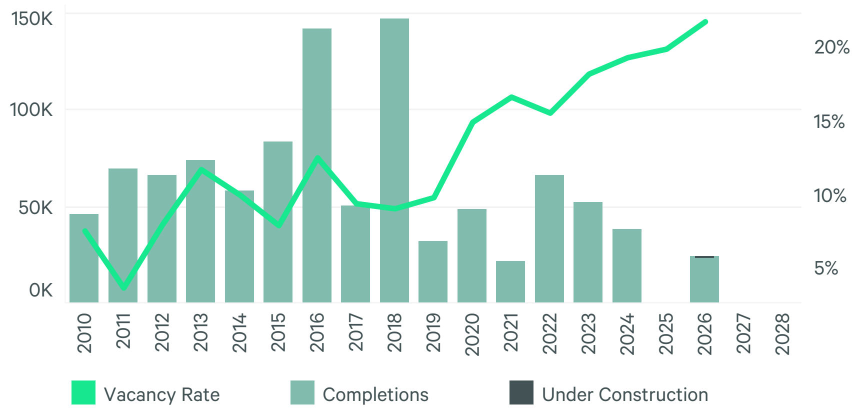
Wroclaw's modern office stock stood at approximately 1,353,800 sq m at the end of Q2 2026. No new office buildings were delivered during the quarter, following the completion of The Park Wroclaw II and Swobodna SPOT in Q1. A minor adjustment to the monitored office base, involving the removal of two buildings planned for conversion to other uses, resulted in a slight quarter-on-quarter reduction in total stock. At the end of June, there was no office space under construction, highlighting the cautious approach of developers in a market where availability remains elevated.

The vacancy rate edged down to 21.8%, compared with 22.0% at the end of March, while the volume of vacant office space decreased to approximately 294,600 sq m. Although the improvement was modest and partly affected by the adjustment to the monitored stock, it also suggests that the market absorbed some of the space introduced during the previous quarter. Availability nevertheless remains high, maintaining competitive pressure on landlords, particularly in older buildings and locations offering occupiers a wider choice of comparable options.

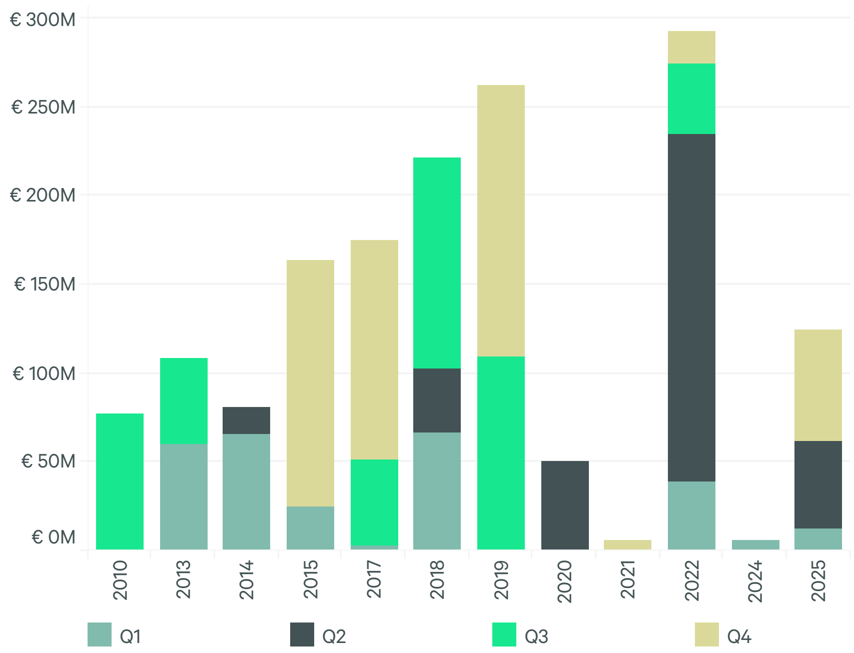
Market Trend (Take-Up | Prime Rent)



Development Activity (Completions | Vacancy Rate)



Wroclaw Office Investment Volumes



Note: 2026 annual numbers till 30.06.2026

Office take-up reached around 19,500 sq m in Q2, bringing the first-half leasing volume to approximately 45,000 sq m. New leases represented 58% of quarterly demand, renewals accounted for 31%, and expansions contributed the remaining 10%. The largest transactions included EPAM's new lease of approximately 3,000 sq m in Quorum Office Park A, Ceneo's 2,900 sq m renewal in Business Garden I and Nasdaq's lease of just over 2,000 sq m in Infinity.

Technology companies were the most active occupier group, generating approximately 42% of take-up, followed by business services with 24% and banking, insurance and investment companies with 12%. The sector mix therefore continues to reflect Wroclaw's established position as a technology and business-services centre, although quarterly results remain influenced by a relatively small number of larger transactions.

Prime headline rents increased to EUR 16.50 per sq m/month in Q2 2026, compared with €16.00 per sq m/month in the previous quarter. The change was influenced partly by the addition of recently completed, higher-priced office space, particularly in Swobodna SPOT, which affected the upper end of the market rent range. Demand continues to favour modern, well-located and energy-efficient buildings, supporting rental levels in the strongest schemes.

Contacts

Katarzyna Gajewska
Director, Head of Research
katarzyna.gajewska@cbre.com
+48 693 330 163

Łukasz Kałędkiewicz
Senior Director, Head of A&T Services, Head of Office Sector
lukasz.kaledkiewicz@cbre.com
+48 501 501 586

Pawel Boczar
Director, Head of Wroclaw Regional Office
pawel.boczar@cbre.com
+48 608 670 805