

Standards for Retail Units with Investment Opportunities

RESEARCH



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01.

Introduction

Given the dynamic changes in the Polish retail market, establishing standards for retail units is becoming a key element of investment and property management strategies. Recent years have seen not only an increase in the number of retail units but also an evolution in their functions and importance within local communities. Office building owners, investment funds, and other stakeholders face challenges related to optimizing retail spaces to meet growing customer expectations and changing market trends.

This report aims to provide comprehensive guidelines for the standards for retail units in Poland. It not only analyzes key technical and functional requirements but also identifies best practices that can increase the attractiveness and profitability of investments. By understanding market needs and location specifics, property owners will be able to more effectively market their units, thus contributing to the development of sustainable retail in cities. This report is an essential tool for all market participants, providing them with the knowledge necessary to make informed investment decisions and develop retail management strategies.

Office building owners, investment funds, and other stakeholders face challenges related to optimizing retail spaces to meet growing customer expectations and changing market trends.



02.

Standards of retail units

In the context of the dynamically developing retail market in Poland, retail units standards' play a key role in shaping investment attractiveness and commercialization effectiveness. It is crucial that retail units, regardless of their location, meet specific requirements regarding accessibility, visibility, and functionality.

Retail units on high streets gain in attractiveness when located in areas with high pedestrian traffic, consequently increasing their visibility and ability to attract potential customers. Providing easy access to the premises, both for pedestrians and vehicles, benefits customer convenience. Proximity to public transportation also contributes to visitor

comfort. Furthermore, high visibility, for example through large windows, facilitates the effective display of goods and promotions, which has the potential to increase sales.

Parking is crucial to the operation of many stores; a lack of adequate parking can significantly impact their attractiveness. Access for delivery trucks is particularly important for locations that regularly receive large deliveries of goods, such as supermarkets. In such cases, ensuring adequate access for delivery vehicles is crucial to maintaining efficient supply chains and high-quality customer service.

What should be taken into consideration?

- Location
- Visibility
- Accessibility
- Public Transport
- Parking Spaces
- Aesthetics
- Functionality



THE ROLE OF RETAIL UNITS IN OFFICE BUILDING GROUND FLOORS

Ground-floor retail units in office buildings play a significant role in enhancing the overall attractiveness of the building. Retail in these spaces should primarily enhance the offerings for office workers, but also attract external customers. Tenants in such spaces must ensure high-quality services and tailor their offerings to the needs of the local community and office workers. Successful examples of ground-floor retail units in office buildings, such as Lixa, The Form, Royal Wilanów, Proximo II, and D48, illustrate how tenant diversity impacts the attractiveness of these spaces. Such units offer services tailored to the needs of both office workers and the local community, attracting external customers. With appropriate design and aesthetics, ground floors become vibrant meeting places, fostering social integration and neighbourhood vibrancy.

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In the case of units located in residential buildings, it is crucial to understand the needs of residents and tailor the offerings to their expectations. The commercialization of these spaces should take into account local preferences and the lifestyles of residents. Such units can offer everyday services such as grocery stores, service outlets, or restaurants. Integrating these premises into the local community can contribute to their long-term success.

Retail units on the -1 level are worth considering, as their attractiveness depends on several key aspects. When selecting a tenant, it's crucial to first verify technical capabilities, such as transportation and evacuation. These spaces may require investment in adapting the space to retail operations, especially

if they weren't previously designed for this purpose. Rents in these spaces are typically lower than on the ground floor, which can be beneficial for tenants, but challenges related to location and adapting the space must be considered. It's important to emphasize that spaces on the -1 level are less competitive than those located directly on the street. Underground spaces lack access to natural light and require additional fresh air systems. They are often small, shallow, and low, resulting in significant design and layout limitations. Owners of underground stores face difficulties in achieving visibility.

Appropriate understanding of the above aspects and their technical analysis can facilitate the effective commercialization of units and contribute to their long-term success on the market.

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03.

Key technical requirements

In the case of retail units, appropriate technical requirements are crucial for their functionality and for the comfort for both tenants and customers. The height and functional layout of the units are fundamental architectural guidelines that influence usability. It's also worth considering the size of the windows, which should be wide enough to allow for an attractive display of goods.

When analyzing various industries, such as fitness, food service, entertainment, and food retail, it's clear that each has its own specific technical requirements. For example, in fitness facilities, it's crucial to ensure adequate usable height and ceiling load-bearing capacity, as well as an appropriate functional layout. Furthermore, noise and vibration protection requirements must be met to create

a comfortable environment for users. Restaurants, on the other hand, require proper ventilation and separate kitchen hood systems extending above the roof. The entertainment industry must comply with more stringent fire regulations and have adequate evacuation options. Requirements for food retail establishments, in turn, will include providing additional storage space, including increased ceiling load-bearing capacity, as well as the ability to deliver directly from the warehouse. Understanding specific industry needs, including regulations and minimum standard requirements, is crucial to creating an effective retail space. Such a space will not only attract customers but also ensure a comfortable user experience.



VENTILATION AND AIR CONDITIONING SYSTEMS, THEIR DIMENSIONS, AND STRINGENT REGULATIONS ARE TYPICALLY THE MOST COMPLEX ISSUES DESIGNERS FACE WHEN DESIGNING COMMERCIAL SPACES.



Ventilation and air conditioning systems, their dimensions, and stringent regulations are typically the most complex issues designers face when designing commercial spaces. These systems are essential to ensuring user comfort and adequate air quality. In the case of catering establishments, ventilation must meet additional requirements related to odour and vapour removal.



Special sanitary requirements apply to restaurants, medical clinics, pharmacies, and veterinary clinics, encompassing not only ventilation systems but also plumbing and HVAC installations, which must be implemented to a higher standard of hygiene. In the fitness industry, ensuring adequate noise and vibration absorption and proper ventilation system performance is crucial to maintaining comfortable temperatures and air quality, which is imperative for customers using such services.



For units located on level “-1,” a number of special technical requirements must be considered. A key aspect is ensuring adequate fresh air, as well as the required fire protection systems and evacuation routes that meet safety standards. Efficient heating and air conditioning are also crucial in such units to ensure customer comfort. Furthermore, the design of these spaces should include adequate lighting.

A space should be designed to optimally utilize available floor space, which is crucial not only for logistics but also for the customer experience. Effective space management is key to maximizing sales. Ergonomic solutions ensure comfort for both customers and employees, which can translate into better customer service and increased sales. Interior design should harmonize with the brand and its values. An attractive, visually coherent design can attract customers and influence their purchasing decisions. Furthermore, accessibility for people with disabilities, especially those using wheelchairs, is crucial for public spaces, including retail units. Consideration should be given to elements such as ramps, elevators, handrails, low thresholds, and a minimum space allowing for comfortable wheelchair rotation.

Lighting plays a key role in creating the ambiance of retail spaces and effectively presenting merchandise. Investing in energy-efficient LED solutions is recommended, as they ensure optimal light quality while minimizing energy consumption. Acoustics are also crucial, as these impact on customer comfort; proper sound management, through the use of sound-absorbing materials and audio systems, can

enhance the shopping experience and extend the time spent on-site. Electrical power requirements are also a significant factor, particularly in food service establishments and should be carefully analyzed to ensure operational reliability and energy efficiency.

Another key aspect of adapting a space to its user is safety. Safety plays a crucial role in retail schemes, so it's vital to implement modern monitoring systems and evacuation procedures that comply with applicable regulations.

Sustainability is becoming an increasingly important consideration in retail design. Using eco-friendly materials and energy-efficient technologies can not only reduce operating costs but also attract environmentally conscious customers. Technologies such as intelligent building management systems can further support operational efficiency.

Requirements outlined above are intended to create a safe, comfortable, and functional space for tenants and their customers, which is crucial for the long-term success of any retail units. Adapting them to these standards can enhance their market attractiveness and increase their investment potential.

Effective space management is key to maximizing sales.

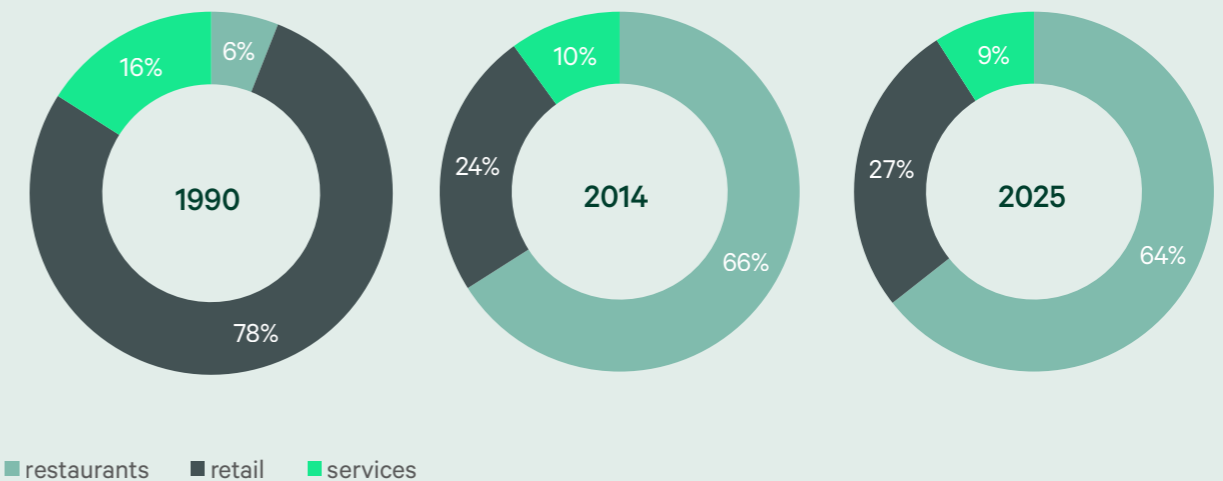
04.

Trends in retail

In recent years, the Polish retail market has undergone significant changes, with many new trends gaining traction. The development of the restaurant sector is one of the most noticeable. A variety of dining concepts, including restaurants, bars, and modern venues such as sky bars, are experiencing a growing popularity in cities. Gatherings with friends and family in cafés and restaurants have become a common pastime, especially in urban areas. Modern Polish cuisine remains highly regarded, but interest in international cuisines, particularly Asian and Middle Eastern, is also growing. Demand for healthy food is also increasing, leading to the growing popularity of organic, vegetarian and vegan options.

Entertainment concepts are gaining popularity, and retail schemes are becoming places where customers can not only shop but also spend time in an engaging way. The introduction of interactive elements, such as children's play areas, smaller game rooms, and various themed events, attracts customers and increases their engagement. These changes are supported by the development of interactive museums and various forms of entertainment that engage both children and adults. Additionally, cultural events, such as live music, art exhibitions and theatre performances remain a crucial part of Polish recreational culture.

The structure of tenants on Nowy Świat Street in Warsaw over the years



Source: CBRE, September 2025

Moreover, the growing popularity of gyms and sports salons indicates a growing interest in a healthy lifestyle and physical activity. Various forms of gyms are becoming increasingly popular. In addition to large chains like Zdrofi, a growing number of small, privately owned venues are emerging offering specialized activities such as Pilates on reformers, personal training, spinning, martial arts and dance. This diversity of offerings attracts clients seeking unique experiences and a more personalized approach to training.

Luxury brands are also beginning to recognize the potential in Poland, which could impact market development. In recent years, Warsaw has become a key destination for luxury shopping, attracting the attention of renowned brands from around the world. The opening of the Dior boutique in the Vitkac shopping centre and the Chanel store in Westfield Arkadia are proof that international fashion houses are recognizing the growing purchasing power of

Polish consumers and their interest in premium fashion. The debuts of brands such as Bvlgari and Santoni, which have chosen locations in the heart of the capital, not only increase the availability of luxury products but also enhance Warsaw's prestige as a shopping destination. As the luxury market in Poland continues to grow, we can expect further increased competition and innovative shopping experiences.

Today, consumers not only expect shopping opportunities but also seek unique experiences. Both the virtual and real worlds are saturated with retail and entertainment, so customers desire individualised attention and personalised service. A neighbourhood's uniqueness can be created by, for example, artisan shops and local brands not available anywhere else, original restaurants, bars with unique interiors, pop-up shops, entertainment venues, outdoor art exhibitions and local events such as breakfast or holiday markets.

In the technology sector, there is a noticeable increase in interest in new products, including Chinese cars, which may change the dynamics of the local automotive market.

It is also worth noting the growing presence of foreign brands entering the Polish market, which enriches the offer available to consumers and affects the competitiveness of the services sector.

The growing interest in sustainability is another significant trend impacting the retail market. Customers are becoming increasingly aware of the environmental impact of their choices, leading to the growing popularity of concepts like zero-waste

and second-hand stores. Shops offering second-hand clothing, recycled furniture and eco-friendly products are becoming increasingly popular, reflecting shifts in consumer attitudes.

Currently, we're seeing a revival of high streets. Increasingly more tenants want to open their formats on main streets or in smaller, more convenient locations for everyday shopping. However, this is only possible by ensuring a high-quality experience and access to a wide range of retail, food and beverage options. Retail units that can adapt their offerings to changing consumer preferences have a chance for success and long-term market development.



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THE NEW FACE OF HIGH STREETS – TIME FOR CHANGE

We're seeing interesting changes taking place in the market. Classic restaurant concepts are evolving, adapting to the growing interest in fine dining and unique culinary experiences. Restaurant owners are introducing innovative ideas, often inspired by foreign trends, which significantly enriches the offerings in Warsaw. However, success often depends on location, exposure, and the availability of outdoor dining areas, which are becoming a significant asset, especially during the summer season.

Luxury brands prefer locations near prestigious boutiques, but Warsaw lacks adequately developed high streets that could provide a suitable environment for them. This creates certain challenges, especially given the limited number of appropriately sized retail units in attractive locations.

The attractiveness of high streets is determined by many factors, including location, architectural aesthetics, and the coherence of the retail offering. We hope that changes in the ownership structure and improved cooperation with authorities will bring positive results and open up new opportunities for investment in this area.

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Karolina Kunciak

Associate Director, Retail Leasing
CBRE

05.

Key success factors for the tenant structure

Tenant mix, or the selection of tenants in a given location, plays a key role in creating attractive retail spaces. Tenant diversity not only attracts a wider customer base but also increases customer engagement, which can translate into higher sales. Modern consumers seek not only products but also experiences, so a diverse offering spanning various industries is crucial to a retail unit's success.

In the context of the 15-minute city concept, the right tenant selection is crucial, influencing the dynamics of the retail space. A variety of dining options, retail stores, healthcare services and entertainment spaces coexist in locations such as Browary Warszawskie, Fabryka Norblina and Elektrownia Powiśle, creating attractive public spaces. These developments, often located in revitalized post-industrial areas, combine modern architectural solutions with the preservation of historical heritage, promoting

sustainable development. Residents gain access to a variety of services and products, fostering social integration and building a local identity.

Another innovative project, Towarowa22, is currently under construction. This space combines residential, office and commercial functions into a harmonious whole that further promotes active leisure. Thanks to carefully planned infrastructure, residents will have easy access to all services and attractions, perfectly aligning with the concept of a 15-minute city, where every element of the space is designed with comfort and sustainability in mind.

Property owners who are able to tailor their tenant selection to the specific location and customer expectations can expect better financial results and greater market stability.





Joanna Mroczek

Head of Strategic Consultancy & ESG
CBRE

HOW TO BUILD RETAIL STRATEGIES?

The 15-minute city concept prioritizes ensuring residents can meet their daily needs within a short walk – from grocery shopping and services (e.g., hairdresser, laundry, medical office), to dining and recreational opportunities. A diverse tenant base makes the development self-sufficient, making life more comfortable and attractive. On the other hand, for tenants to maintain and develop, they need the right business conditions – including visibility, convenient pedestrian access and adequate customer traffic. Without these elements, even the most carefully curated service offerings will be unable to generate sufficient revenue. The challenges here are the fragmented ownership of the units and the need for cooperation between owners.

The investment development strategy for commercial and service functions should be based on:

01 Analysis of the profile and needs of residents – in order to provide a diverse and complementary range of services,

02 appropriate selection and arrangement of premises within the estate so that they are easily accessible and naturally integrated into the residents' daily routes,

03 using decision support tools such as:

- a database of tenants, enabling the comparison of offers and matching the business profile to the nature of the estate,
- tools that help assess potential footfall and select the best locations for specific industries.

Retail leasing strategy isn't limited to residential developments – it's equally important for office buildings. A well-planned retail offering in office buildings enhances their attractiveness, increases the investment's value and creates vibrant, multifunctional spaces that attract not only employees but also residents of surrounding neighbourhoods. These spaces must be open and accessible, otherwise they can fail to survive based solely on employee retention.

Retail in office buildings:

01 builds added value of the property, properly planned – generates additional income from rent,

02 improves the image of the building and its public space,

03 supports the idea of a 15-minute city, where work, shopping and services are available in the immediate vicinity.

As in housing estates, the planning process should be based on analytical tools – tenant databases, scoring models and pedestrian flow studies, which allow for the proper allocation of individual functions and the creation of an attractive retail mix.

In short: retail in multi-functional buildings is not an “add-on”, but a strategic element that can determine the success of the entire investment.

06.

Challenges for property owners

Commercial property owners face numerous challenges that can impact the commercialization process and the long-term success of their investments. Key issues related to the local development plan (LDP), community planning and ownership structure can significantly hinder the development of retail units.

Issues with LDPs often involve restrictions on the functions that can be implemented in a given area. Owners must understand local regulations and adapt their plans to meet zoning requirements and allowable activities. Often, amending LDPs can be a lengthy process, introducing uncertainty and delays in the commercialization of the property.

The community also plays a crucial role in the success of a property. Landlords must be aware of the needs and expectations of local residents, which can influence tenant selection and the type of services offered. Sometimes, a lack of understanding of local preferences can lead to commercialization failures.

Another challenge for retail landlords is the ownership structure. Many urban properties are privately owned,

often involving individual retail units. This fragmentation can lead to a lack of cohesion in tenant mix, which in turn influences the overall attractiveness of a given location. When units are managed by different owners, it's easy to encounter situations where there's a lack of synergy between tenants, which can limit their ability to attract customers.

In the context of ground-floor units in residential buildings, owners often have greater flexibility in selecting tenants, which allows them to tailor their offerings to the needs of residents. However, to effectively market these spaces, it's better to first conduct a tenant analysis and then create an attractive tenant mix, which can increase the long-term value of the investment. This approach can contribute to financial stability and attract customers, which in turn increases the attractiveness of the entire building.

To effectively overcome these barriers to commercialization, property owners can employ various strategies. Maintaining a dialogue with local authorities and the community is crucial to better understand their needs and expectations.



Witold Fizyta

Managing Director
The Nowy Świat Association

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SHARED SPACE, SHARED RESPONSIBILITY

In the face of the challenges posed to retail property owners by the dynamically changing market environment, it is crucial that each of us recognizes the importance of cooperation and dialogue. The Nowy Świat Association works to integrate local communities and collaborate with local government authorities, which has a direct impact on the development of the Royal Route.

In recent years, we have observed significant changes in the tenant mix, reflecting the evolving needs of residents and visitors. Therefore, landlords must not only respond to these changes but also actively participate in shaping spaces that meet community expectations. The introduction of the Warsaw Historical Center Cultural Park, with its aesthetic and advertising regulations, is a step towards streamlining urban space, which will undoubtedly benefit both landlords and tenants.

Commercial property owners in Warsaw face a number of challenges that significantly impact their operations. We are observing a decline in the need for collaboration with organizations, which can lead to isolation and limited opportunities for collaborative problem-solving. In the context of the new landscape resolution, which aims to improve the orderliness of public spaces, it is crucial that the role of conservators is more strongly enforced and that order on high streets is maintained. Residents and customers expect aesthetic coherence and spatial order, which requires the inventory of signs and eliminating chaotic decorations. To meet these expectations, it will be crucial to introduce attractive architectural and functional elements that will harmonize the space and attract potential customers, thus creating a friendly and inspiring environment for all users.

Joint efforts to improve the quality of retail space in Warsaw, such as educating on good practices and promoting synergies between tenants, can contribute to the long-term success and development of Nowy Świat Street as a vibrant place that attracts residents and tourists.

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07.

Recommendations for property owners

To effectively manage retail units and maximize their potential, owners should implement best practices in design and commercialization. Understanding market needs and adapting offerings to customer expectations is a key element of success.

One of the best practices in retail units design is creating flexible spaces that can adapt to changing trends and tenant needs. This approach allows for a faster response to rapidly changing market conditions. Space flexibility can include the ability to easily change the interior design, as well as the use of modular solutions that allow the layout of the units to be adapted to various functions.

When it comes to commercialization, building strong relationships with potential tenants is crucial. Landlords should actively seek information about local preferences and needs to propose offers that meet market expectations. It's also worth conducting competitive research and analyzing industry trends to better understand market dynamics.

Collaboration with local associations and organizations can also bring tangible benefits.

One of the best practices in retail units design is creating flexible spaces that can adapt to changing trends and tenant needs.

Summary

01

Designing flexible spaces allows for the units to be quickly adapted to changing trends and tenant needs, which is crucial in a dynamically changing market.

02

Building strong relationships with tenants and understanding local preferences and needs is crucial to effective commercialization and long-term investment success.

03

Understanding local preferences and market needs is fundamental to creating attractive offers.

04

Retail units must meet specific technical requirements, such as adequate ventilation, air conditioning, lighting and access for suppliers, to ensure comfort and functionality.

05

The use of eco-friendly materials and energy-saving technologies is becoming increasingly important, making properties more attractive to environmentally conscious customers.

06

Changes in consumer preferences are being observed, such as a growing interest in a healthy lifestyle, sustainable development and unique shopping experiences.

07

Dining and entertainment venues are gaining popularity thanks to the unique experiences they offer customers.

08

Property owners must face challenges related to Local Development Plans, ownership structures, and the expectations of local communities in order to effectively commercialize their properties.

We encourage further contact and consultation to explore the topics discussed and to obtain support in the management and commercialization of commercial premises. Our knowledge and experience can help you effectively adapt your investment strategies to the changing market, contributing to the long-term success of your investment.

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