

Poland - TriCity

Key Performance Indicators

Prime Yield

8,30%

Expected Investment Returns
Change YoY: 0 bps

Prime Rent

€ 16,00

Monthly, per sq m
Change YoY: 1,6%

Average Rent

€ 15,00

Monthly, per sq m
Change YoY: 0,8%

Office Investment Volume

€ 346M

In Poland during Q2 2026
€ 1.94B (Rolling 12 months)

Take Up

17K

Square Meter
46K Year2Date

Vacancy Rate

10,40%

Percentage of Stock vacant
Change YoY: -226 bps

Completions

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Square Meter
13K Year2Date

Total Stock

1 077K

Square Meter
965K Occupied Stock

(Forecast) Completions

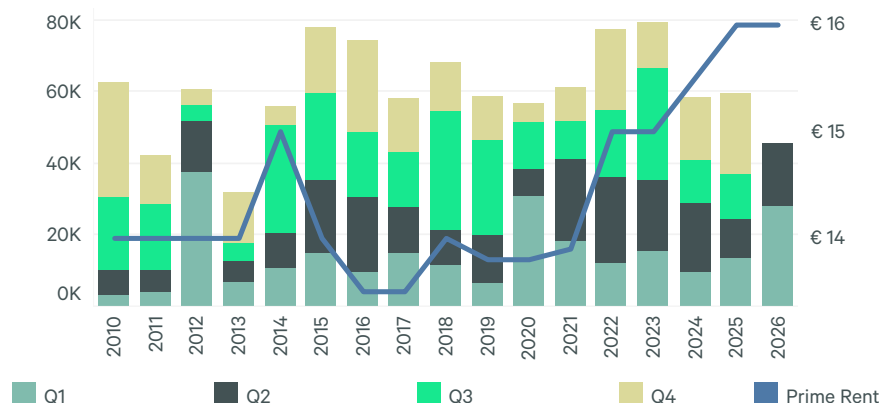
25K (2026)

Square Meter
11 000 (2027) // 22 171 (2028)

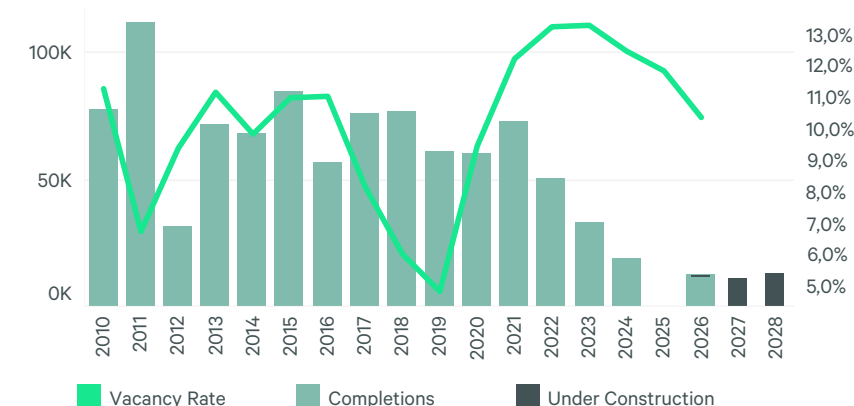
Tricity's modern office stock stood at approximately 1,077,000 sq m at the end of Q2 2026. No new office buildings were completed during the quarter, following the delivery of Punkt in Gdansk in Q1. Development activity remained relatively contained, with around 36,000 sq m under construction. The limited scale of the pipeline continues to reflect a disciplined approach to new supply and should help preserve the market's comparatively healthy balance.

The vacancy rate declined from 10.8% at the end of March to 10.4% in Q2, while the volume of available office space fell to approximately 112,000 sq m. This further improvement confirms Tricity's position as one of Poland's tightest regional office markets. With no new supply introduced during the quarter, ongoing tenant activity supported the absorption of existing availability. Occupier interest remains focused on modern, well-connected buildings.

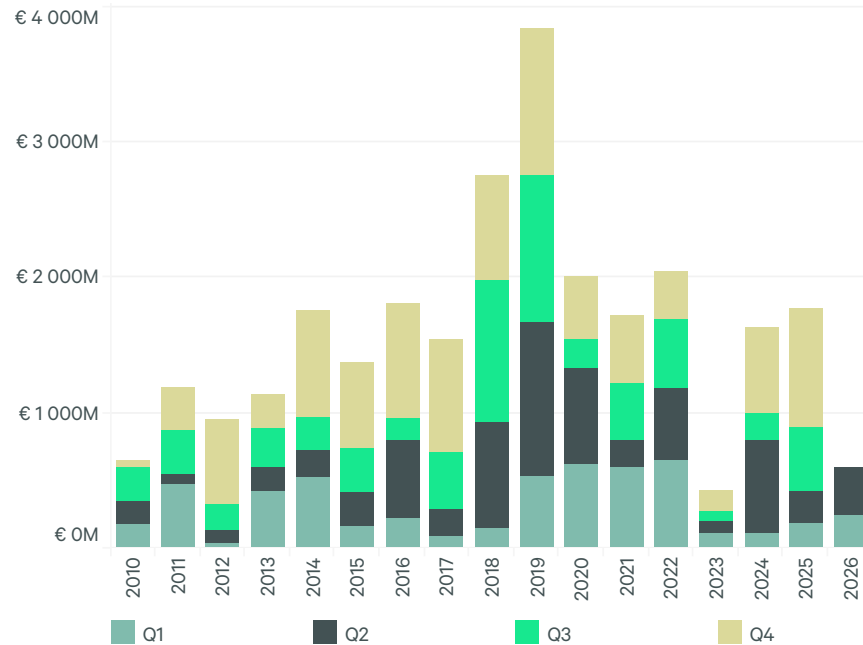
Market Trend (Take-Up | Prime Rent)



Development Activity (Completions | Vacancy Rate)



Poland Office Investment Volumes



Note: 2026 annual numbers till 30.06.2026

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

Mariusz Wisniewski
Senior Director, Head of Regional
Markets
mariusz.wisniewski@cbre.com
+48 501 598 940

Leasing activity reached approximately 20,600 sq m in Q2, bringing first-half take-up to around 70,600 sq m. Although the quarterly volume was lower than the strong result recorded at the beginning of the year, the structure of demand remained encouraging. New leases accounted for 74% of take-up, while renewals represented 16% and expansions contributed 10%. This marks a clear shift from the more evenly balanced structure seen in Q1 and indicates that occupiers continued to make fresh location decisions despite a more moderate overall transaction volume.

IT products and services were the leading source of demand in Q2, generating approximately 50% of take-up. Manufacturing followed with 14%, while construction and development companies accounted for 10%.

Prime headline rents remained stable at up to EUR 16.00 per sq m/month at the end of Q2 2026. Pricing in the best-performing office schemes continues to be supported by limited availability of high-quality space and sustained occupier demand for modern, well-located buildings.

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