MARKET IN MINUTES
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Wrocław Office Market

Weakening pipeline, rising vacancies

At the close of H1 2025, modern office supply in Wrocław stood at 1,355,100 sq m. Approximately 36% of this supply, equating to 489,500 sq m, is strategically located within the City Centre zone. The remaining supply is distributed across the West (33% share), South (22%), and North/East (9%) zones.

In line with trends observed across the majority of regional markets, Wrocław did not see any new office supply delivered between January and June 2025. This contrasts with 2024, when deliveries amounted to 38,400 sq m.

Currently, Wrocław's development pipeline comprises just under 20,000 sq m of office space under construction, marking a 52% y-o-y decrease. There are only two projects underway, with only one exceeding 10,000 sq m: the first phase of the Swobodna Spot by Echo Investment project, totalling 14,600 sq m. Should all projects be completed on schedule, no new office supply is anticipated in 2026, aside from potential rollovers from 2025. As of now, approximately 26,000 sq m of new office space is projected for delivery in 2027.

Wrocław's office market size is reflected in its tenant activity compared to other cities. Its share of leasing activity in H1 2025 stood at 21%, positioning it between Kraków (44%) and Tricity (14%).

Total leasing activity in the first half of 2025 reached 80,700 sq m, marking a 53% increase compared to H1 2024. Leasing activity stood at approximately 43,800 sq m in Q1, followed by 36,900 sq m in Q2. The West zone accounted for the largest share of leased space at 44%, followed by the City Centre at 30% and the South at 21%. The North/East zone represented around 6% of the city's total demand.

Tenants are increasingly opting for smaller office spaces in Wrocław. In H1 2025, over 20 new transactions were recorded in the 100-500 sq m range, with the average size of a new lease transaction being just under 800 sq m. For comparison, the average renegotiation size stood at 1,700 sq m.

In H1 2025, demand was predominantly driven by renegotiations, accounting for 51% of activity. New leases constituted 34%, while expansions made up 9% and pre-lets contributed 6%. For comparison, H1 2024 exhibited a slightly different structure, with renegotiations at 54%, new leases at 42%, and expansions at 4%. No pre-let agreements were recorded during that period.

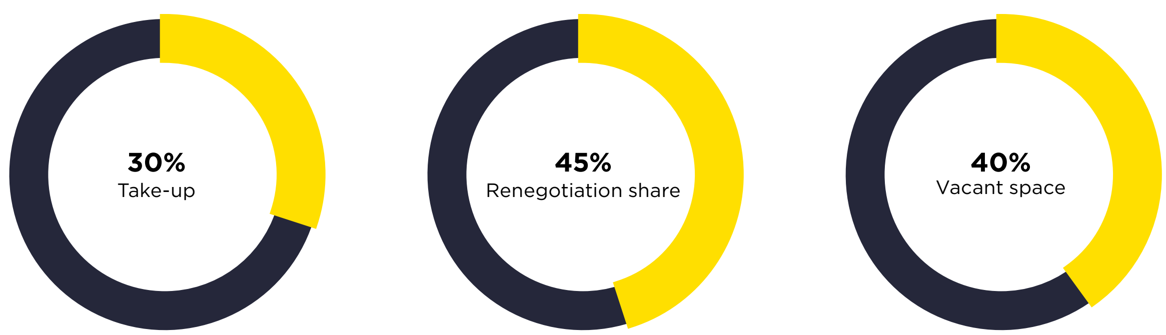
At the end of June 2025, Wrocław's office market recorded 277,700 sq m of available space, resulting in a vacancy rate of 20.5% (increase of 230 bps y-o-y). Vacancy rates exhibited variation across different zones: the City Centre reported the highest at 23.0%, closely followed by the West with 21.5%. Conversely, the South and North/East zones demonstrated lower vacancy rates of 16.8% and 15.8%, respectively.

In H1 2025, Wrocław experienced negative net absorption, reaching -11,800 sq m. For comparison, net absorption for the total of 2024 stood at 19,000 sq m.

Headline rents for new A-class office buildings currently range from EUR 14.00 to EUR 16.50/sq m/month. A notable market trend is the increasing prevalence of enhanced incentive packages, which landlords are offsetting by quoting correspondingly higher headline rents, particularly for prime projects under construction.

For well-maintained and professionally managed properties, service charges generally fall within the range of PLN 19.00- 30.00/sq m/month.

City Centre compared to the city



Source: Savills Research

Key office data H1 2025:

1.35 million sq m
Total office supply

19,800 sq m
Total space under construction
(52% down y-o-y)

0 sq m
New supply
(38,300 sq m in 2024)

20.5%
Vacancy rate
(230 bps up y-o-y)

80,700 sq m
Total take-up
(53% up y-o-y)

-11,800 sq m
Net absorption
(19,000 sq m in 2024)

Wrocław key data:

Population
672,900
December 2024

Average salary
PLN 9,410
May 2025

GDP growth
3.2%/3.8%
2024/2025 (f)

Unemployment rate
1.8%
May 2025

Number of students
106,120
2023/2024

Number of graduates
26,100
2023/2024

Number of BPO/SSC centers
250
June 2025

BPO/SSC employment
70,300
June 2025

Source: Statistics Poland, Oxford Economics, ABSL 2025

Trends for the following quarters:

01

Cost optimalisation

Strong tenant focus on cost efficiency / fit-out management

02

Compact office spaces

Increased interest in smaller units, up to 500 sq m

03

Limited reductions

Less reductions during renegotiations

Wrocław office zones

Savills Research

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Daniel Czarnecki
Head of Landlord Representation
+48 519 033 717
dczarnecki@savills.pl

Jarosław Pilch
Head of Tenant Representation
+48 694 497 800
jpilch@savills.pl

Dorota Kościelniak
Director
Wrocław
+48 785 768 338
dorota.koscielniak@savills.pl

Wioleta Wojtczak
Head of Research
+48 600 422 216
wwojtczak@savills.pl

Savills sp. z o.o., al. Jana Pawła II 22, 00-133 Warszawa, +48 22 222 4000,savills.pl