

Strong cities



City attractiveness, office market, HR trends

Q4 2024

The office market sentiment, the investment potential of the city and the labour market.

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Katowice

Prepared
in cooperation with



Michael Page

Katowice

- ▶  **City area**
164.7 sq km
- ▶  **Population**
278,100
(Katowice, GUS 06.2024)
2,128,034
(GZM, InfoGZM 2023)
- ▶  **Population forecast**
261,050
(2030)
- ▶  **Unemployment rate**
1.0%
(08.2024, GUS)
- ▶  **GDP growth**
18.0%
- ▶  **PKB per capita**
PLN 85,131
- ▶  **Average salary (gross)**
PLN 12,578.20
(in the business sector, 11.2024, GUS)

Investment attractiveness

Rankings

7TH PLACE in the **"Top 10 Large European Cities of the Future 2024 - fDi Strategy"** City's strategy for attracting foreign direct investment

2ND PLACE in the ranking of **Business-Friendly Cities** of "Forbes" - cities and municipalities of 150,000 - 299,000 inhabitants

3RD PLACE in the **"Polish Cities of the Future 2050"** ranking - in the sub-ranking of office, residential and "after hours" and **1st place in the school category**

TITLE: **"European City of Science" 2024**
awarded by EuroScience Association

CERTIFICATE: **"Standards of Investor Service in Local Government"**

Investment incentives

The Investors Assistance Department is a special unit in the Katowice City Hall. It provides various services ranging from supporting investors who create business service centres, developers of the residential space, hotels and offices, to creating an ecosystem for start-ups and a friendly environment for the SME sector.

Providing investors with support based on their individual expectations and requirements: preparing market analyses, information on investment locations, offering image-building assistance, organising investors' visits, coordinating cooperation with universities, etc.

Katowice Special Economic Zone - the best in Europe and one of the best in the world (fDi Intelligence), offering income tax exemptions.

Structured educational projects to support the development of talent in the city from secondary school to higher education: P-TECH, Corporate Readiness Certificate (CRC).

A chance to invest inside a centre that has been implementing sustainable development policies based on Agenda 2030, UN.



Quality of life

Rankings

3RD PLACE in Business Insider's ranking
- **Best city to live**

2ND PLACE in the "Europolis" ranking of the Schuman Foundation for **the most ecological Polish cities**

1ST PLACE for the **Culture Zone** in the "Top Municipal Investment of the Decade" poll of Portal Samorządowy

2ND PLACE in "**Electromobile Cities Ranking**" by Polityka Insight

6TH PLACE in Poland among cities with more than 100,000 residents in terms of **quality of life** assessment in the "Newsweek" ranking

silver award for sustainable development, in the category of cities with more than 400,000 daily population, in The International Awards for Liveable Communities LivCom Awards 2023

Quality of life in numbers

- Implementing the 17 UN Sustainable Development Goals and the objectives of the Development Strategy City 2030 - equitable transformation, climate change and equity.
- Green urban transport: 28 electric buses, 22 hybrid buses and 8 CNG buses, 197 EV charging points.
- District of New Technologies - Katowice Gaming and Technology HUB – PLN 630 m.
- District of New Technologies - development of the Poniatowski mining shaft area stage 6 – PLN 2.7m (documentation).
- Construction of the Jerzy Kukuczka Himalayan Centre – PLN 82.8m.
- Katowice Integrated Transfer Hub System - "Św. Jana" hub – PLN 74m.
- Katowice Integrated Transfer Hub System - "Kostuchna" hub – PLN 74.6m.

Tasks to be completed in 2025:

- Construction of a municipal stadium in Katowice – PLN 363.4m.
- Construction of new road systems to connect functional areas housing and services in the city - PLN 224.9m.
- Katowice "Kilar's House" Music Education Centre and a permanent exhibition – PLN 22,1m.
- Construction and modernisation of city parks in Katowice - PLN 42.2m
- Improving the safety of road users through construction and modernization of engineering facilities along public roads in the area in Katowice - PLN 31.8m.
- Witos' Community Centre and a park – PLN 28.9m
- Katowice Bicycle Infrastructure - Velostrada - construction of the Velostrada bicycle road no. 6 – approx. PLN 11.5m.
- Katowice Resident Card – 141,884 active cards.
- Participatory Budgeting – PLN 20m including Green Budget – PLN 3m.



Bike paths
200 km



Green areas
50%
of the city's area

Facts & Figures

Number of students
50,848 (Katowice)
91,083 (GZM)

Number of graduates
12,549 (Katowice)
22,862 (GZM)

Number of universities
12 (Katowice)
19 (GZM)

Airport - distance to the city centre
30 km


Airport - number of passengers
5.61m (2023)


BSS sector - number of centres
105 (Katowice)
140 (GZM)


BSS sector - number of employed
26,600 (Katowice)
33,400 (GZM)


Katowice


Q4 2024

- 

Existing stock
778,000 sq m
- 

Supply under construction
38,000 sq m
- 

Vacancy rate
23.2%
- 


New supply
27 000 sq m
- 


Take-up
48,000 sq m


Coworking operators in Katowice

City Space | Regus
Własne B. | Cluster Offices

Standard lease terms in new buildings

- 

Service charge
PLN/sq m/month
14.00-26.00
- 

Rent-free period
1-1.5 month
for each contract year
- 

Fit-out budget
EUR/sq m
350.00-500.00

► The total office space in Katowice currently amounts to 778,000 sq m, accounting for approximately 6% of Poland's total office space.

In 2024, demand for office leasing in Katowice weakened, reaching 48,000 sq m, which led to an increase in the vacancy rate to 23.2%. However, limited developer activity is expected to reverse this trend in the long term.

SUPPLY

In 2024, nearly 27,000 sq m of modern office space was delivered to the market, representing 21% of the new supply in regional markets. Katowice ranked second among regional cities for office space delivered, behind only Wrocław.

In Q4, Grundmana Office Park A, developed by Cavatina Holding, was the largest office scheme completed outside of Warsaw, with an area of nearly 21,000 sq m. Currently, approximately 38,000 sq m of office space is under construction across five projects, all set to be completed in 2025. The largest of these is the Eco City Katowice complex, which will have a total area of 18,000 sq m.

TAKE-UP

In 2024, demand for office space in Katowice totalled nearly 48,000 sq m, representing 7% of the leased office space in regional cities. The largest share of transactions came from the business services sector, accounting for 25%. In Q4 alone, over 16,000 sq m of office space was leased in Katowice. Throughout the year, more than half of the transaction volume (51%) consisted of new leases. Renegotiations remained a significant factor, making up 37% of the transaction volume by year-end. Expansions accounted for over 7%, marking the second-highest result in Poland, after Lublin. The remaining 5% of leased space consisted of owner-occupier agreements.

VACANCY RATE

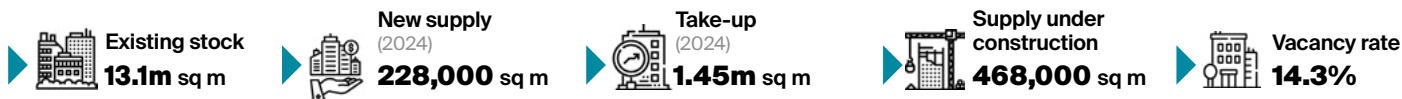
At the end of 2024, the vacancy rate in Katowice stood at 23.2%, the highest level in the history of the local market. This increase was primarily attributed to the completion of two office buildings in Q4, totalling nearly 26,000 sq m, which contributed to a rise in the vacancy rate of 2.7 pp compared to the previous quarter (an increase of 1.7 pp year-on-year). Given the relatively limited amount of space under construction, it is expected that the vacancy rate will begin declining in the long term.

RENTS

At the end of Q4 2024, asking rents in Katowice remained stable, typically ranging from EUR 9,00 to 14,50/sq m/month. Operating costs also held steady compared to the previous quarter, ranging from PLN 14.00 to 26.00/sq m/month.

Office market in Poland

Q4 2024



SZCZECIN

187,000 sq m
 7.7%
 EUR 10-14.5

POZNAŃ

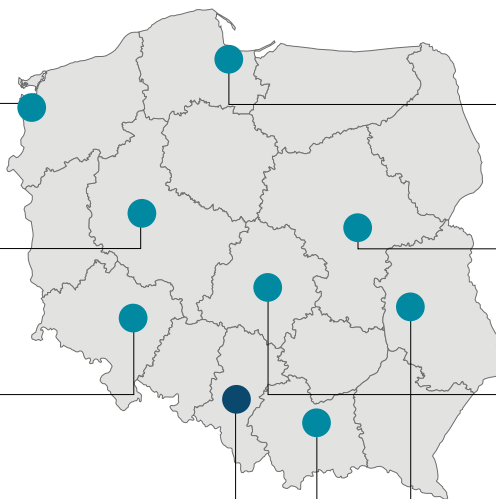
674,000 sq m
 13.4%
 EUR 11-16

WROCŁAW

1.38m sq m
 19.3%
 EUR 10-16

KATOWICE

778,000 sq m
 20.2%
 EUR 9-14.5



TRICITY

1.07m sq m
 12.5%
 EUR 11-16

WARSAW

6.29m sq m
 10.6%
 EUR 10-28

ŁÓDŹ

648,000 sq m
 22.7%
 EUR 9-15

LUBLIN

221,000 sq m
 11.6%
 EUR 9-13

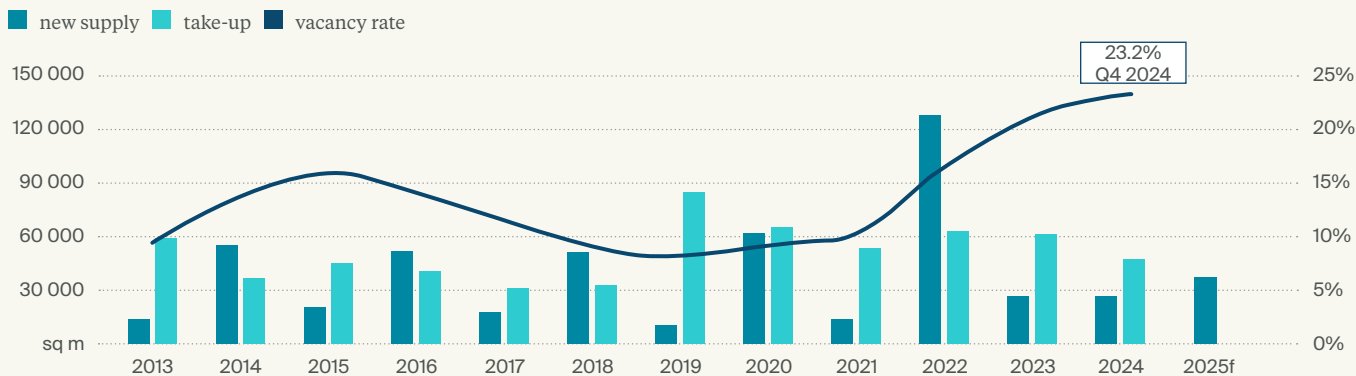
KRAKOW

1.83m sq m
 19.0%
 EUR 10-18

🏢 - office stock
 📊 - vacancy rate
 🏗️ - asking rents (per sq m per month)

Source: Knight Frank

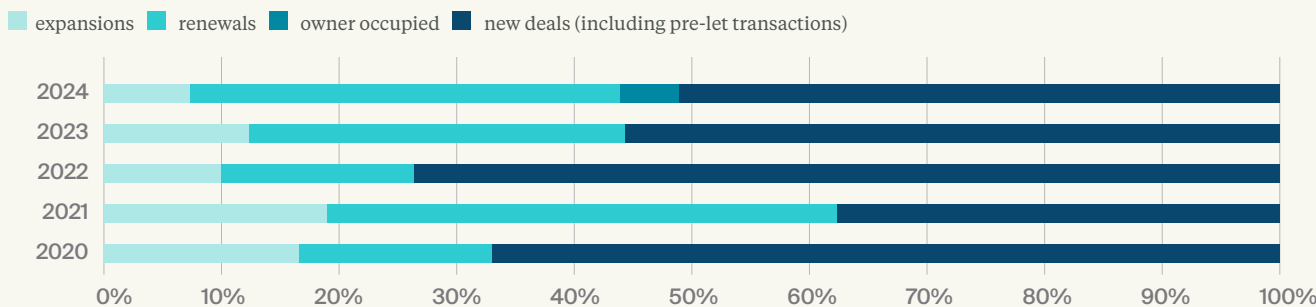
Annual new supply, take-up and vacancy rate in Katowice



f-forecast based on schemes under construction

Source: Knight Frank

Take-up structure in Katowice



Source: Knight Frank

Salary and Trend Overview in Production, Warehouse Logistics, and Manufacturing in Poland

The year 2025, as a continuation of 2024, brings numerous challenges for the sector of production logistics, warehouse logistics, and manufacturing in Poland. Naturally, the context of these challenges is broader and involves changes across Europe and globally. The market is facing several significant difficulties related to growing challenges in operational efficiency, the need to attract qualified employees, and changing salary expectations, which are evident throughout Europe, with this increase being particularly noticeable in Poland.

Although the production and logistics industry plays a key role in the economy, its dynamics are constantly evolving, requiring companies to demonstrate flexibility and adapt to new economic realities and labor market challenges.

Salaries in Logistics and Manufacturing

According to industry reports, including one published by Michael Page, average salaries in production and logistics are expected to continue growing in 2025, although at a slower pace than the previous year. The level of remuneration largely depends on the specific position, location, and company size, but a general trend of rising salary expectations is observed across the market. In addition to macroeconomic factors and inflation, the increase in the minimum wage also plays a role, impacting not only the salaries of production workers and warehouse staff but also those in specialized, expert, and managerial roles.

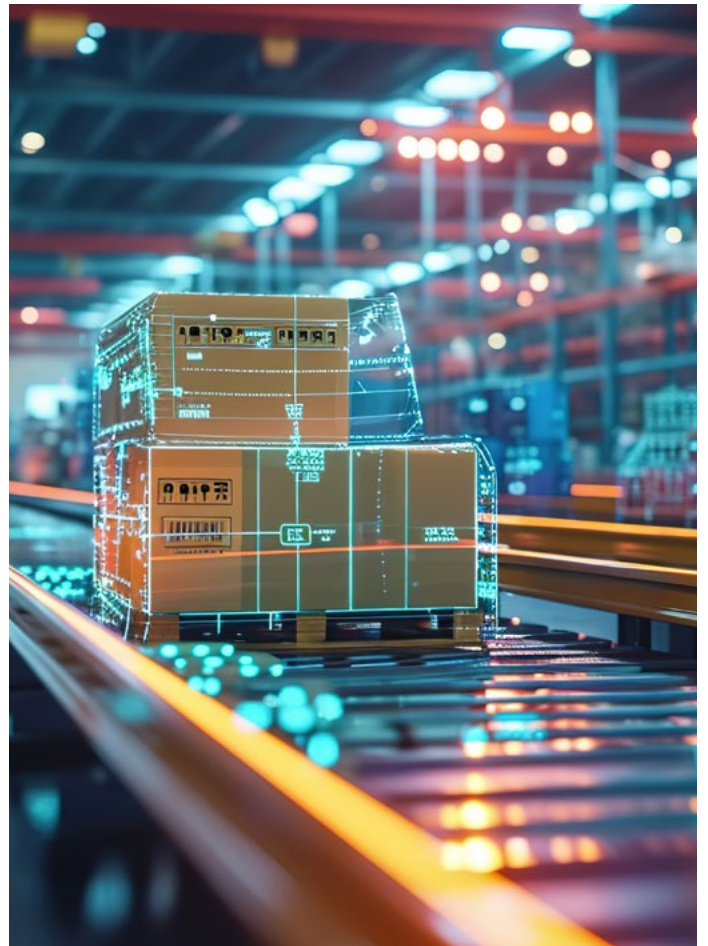
For another consecutive year, the gap in salaries between qualified experts and managers is expected to diminish, with the wage distance between these two groups narrowing.

The increase in wages in recent years, despite intense competition in the labor market, is a result of the growing automation and digitalization of production and logistics processes. Operational efficiency is becoming increasingly important, and achieving this without appropriate human and technological resources is difficult.

Recruitment in Logistics and Manufacturing: Challenges and Needs

With each passing year, as automation of processes advances, the demand for workers in logistics and manufacturing also increases, particularly in warehouse management, transport, and maintenance areas. It is estimated that, in 2025, the number of job vacancies in this sector in Poland could exceed 100,000. The logistics sector, especially with the intensive growth of e-commerce, requires adequately skilled employees who can meet the growing demands related to the speed and precision of deliveries.

According to a 2024 report from the Polish Institute of Logistics and Warehousing (PILM), 60% of companies in the warehouse and logistics industry report difficulties in recruitment, especially for manual laborers and middle management positions. Employers must rely on innovative methods of talent acquisition, such as collaborating with technical universities, organizing internships,





and creating career development programs. Companies often also turn to specialized headhunting firms to acquire the best talent, as they face challenges reaching them independently.

Automation and the Future of Employment

Trends indicate continued development in the automation of logistics, warehouse, and production processes, which may reduce the demand for manual labor in the short term. On the other hand, there is an increasing demand for specialists in the operation of advanced technologies such as robotics, automation, artificial intelligence, and the Internet of Things (IoT). These changes prompt companies to invest in the development of their employees' skills, offering courses and training related to modern warehouse systems or advanced production lines, and encouraging the search for new talent to strengthen existing teams.

Experts predict that in the coming years, the most sought-after specialists will include supply chain managers, logistics data analysts, and automation engineers. In the production sector, increasing importance will be placed on individuals involved in designing and implementing new technological solutions that enable more efficient process management. The manufacturing sector will also face the impact of artificial intelligence development and advancing automation, aiming to meet numerous standards, stabilize product prices, and improve cost efficiency.

Best Practices in Personnel Management in Logistics and Manufacturing

Companies in the logistics and manufacturing sectors that successfully attract and retain employees implement a range of best practices. Transparency in the recruitment process, aligning job offers with the actual needs of employees, and creating opportunities for career development are crucial factors before entering into collaboration with a potential candidate. Employers are increasingly adopting work flexibility, using hybrid work models for positions where this is technologically or process-wise feasible. Moreover, companies are investing in motivational and loyalty programs that support long-term retention of talent. These include, among other things, bonus programs and the development of career paths.

The logistics and manufacturing industries in Poland face many challenges, but their growth is essential to maintaining the competitiveness of the economy. Rising salaries, changing employee expectations, and the increasing role of technology are key elements shaping the future of the sector. Companies that successfully adapt to these changes will gain a competitive advantage in the market and can expect continued growth and enhanced operational efficiency.

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INVESTORS ASSISTANCE DEPARTMENT

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Investors Assistance Department is a dedicated unit of the Katowice City Hall, which provides comprehensive services: from supporting business services investors, residential and commercial developers, to creating a friendly environment for start-up and the SMEs sector. Investors Assistance Department focuses on providing solutions customized to the needs of investment projects. Thanks to a wide range of innovative products an experienced team of experts supports investors in achieving their business goals in Katowice and in gaining and maintaining a competitive advantage.

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