

MARKET REPORT · OFFICES

GDAŃSK OFFICE MARKET

Rents, vacancy, supply and subleases in Gdańsk's modern office stock from **the tenant's perspective.**

AS OF 01.10.2026

831k

M² OF STOCK

8.17%

VACANCY

€15.63

AVG. RENT / M² / MONTH

9.15k

M² UNDER CONSTRUCTION

01 · EXECUTIVE SUMMARY

RENTS UP 11% YEAR ON YEAR, VACANCY AT 8.17%

Over the past year the Gdańsk office leasing market has tightened markedly. The vacancy rate fell from 9.87% to **8.17%**, space available immediately shrank by **22%** (-19,000 m²) and the average asking rent rose by 11.2% to **€15.63/m²**.

MODERN STOCK 831,194 m² 96 buildings · 52 class A / 44 class B	VACANCY RATE 8.17% 67,869 m² available	AVERAGE ASKING RENT €15.63/m² for available space
UNDER CONSTRUCTION 9,150 m² 2 schemes	SUBLEASES 7,519 m² hidden supply · mainly Oliwa and Przymorze	SERVICE CHARGE PLN 25.50/m² median of quoted advances

1. VACANCY: -1.70 PP YEAR ON YEAR

The vacancy rate fell from 9.87% in Q3 2025 to 8.17%. After a sharp drop in Q2 2026 (to 7.86%), it has settled at just over 8%.

2. RENTS: €15.63/M², +11% YEAR ON YEAR

The average asking rate rose year on year from €14.06 to €15.63/m² and is 18% higher than at the start of 2023 (€13.23/m²). Top asking rents are €17.00-17.25/m².

3. A TWO-SPEED MARKET

Śródmieście (4.42%) and Osowa (1.68%) are now clearly a landlord's market. In Oliwa (10.10%) and Przymorze (11.55%), together half of the city's stock, availability remains in double digits, with rents 7-9% lower than in Wrzeszcz.

4. SUPPLY: 1.1% OF STOCK UNDER CONSTRUCTION

Two schemes totalling 9,150 m² are under construction. The larger of them, Garnizon.biz - Nano in Wrzeszcz (8,500 m²), is due for completion in Q1 2028.

WHAT DOES IT MEAN FOR TENANTS?

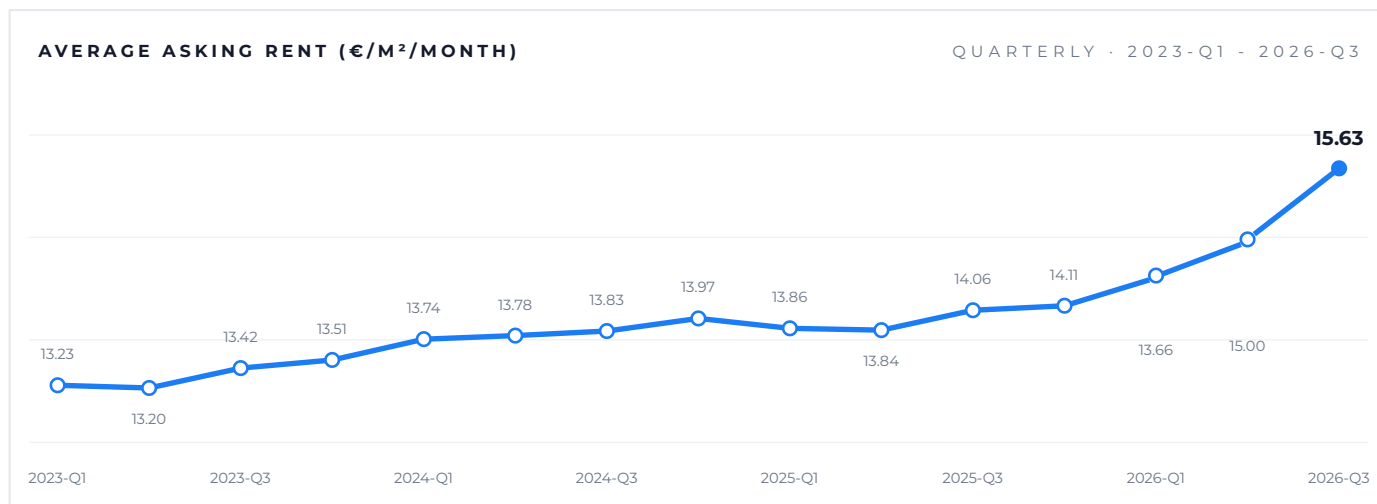
With asking rents **11.2%** higher than a year ago and a shrinking supply, the room to negotiate is narrowing markedly. Leases expiring in **2027-2028** are worth opening 18 to 24 months ahead. The widest room for negotiation today is in buildings with higher vacancy, above all in Oliwa.



02 · RENTS

€15.63 - €2.40 MORE THAN AT THE START OF 2023

The average asking rent for available space rose by €1.57/m² (+11.2%) over the year to €15.63/m² and is €2.40/m² higher than at the start of 2023. Rising rents go hand in hand with shrinking supply: available space is 22% lower than a year ago.



HIGHEST ASKING RENTS

BUILDING	€/M ²	VACANCY	AVAILABLE M ²
PUNKT	17.25	12.2%	1,550
Heweliusza 18	17.00	1.7%	170
ETERNUM	17.00	22.6%	1,028

ANALYST COMMENTARY

District averages range from €11.42/m² (Stogi) to €16.64/m² (Wrzeszcz). The gap between Wrzeszcz and Oliwa, the city's largest office area, is only €1.49/m². The median service charge is PLN 25.50/m² and is highest in Wrzeszcz (PLN 28.23/m²); it has to be added to the headline rent in the lease budget.

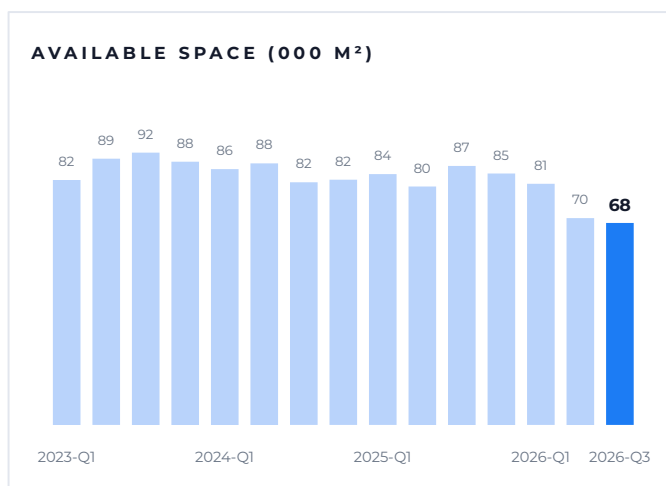
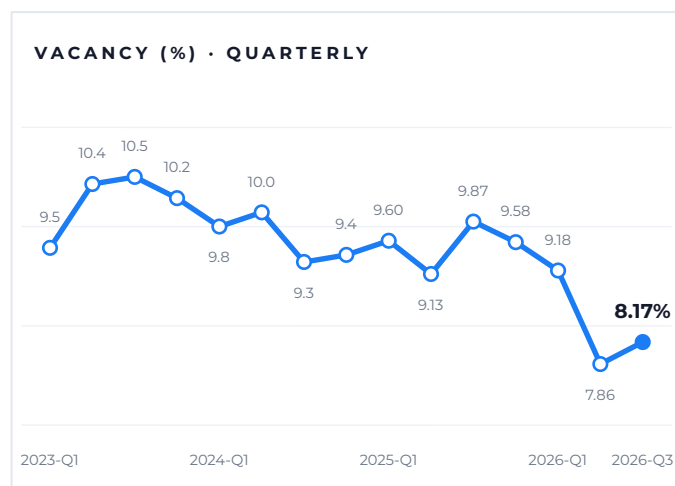
BROOKFIELD PARTNERS PERSPECTIVE

The asking rent is only a starting point. The real effective cost (NER), after rent-free periods, fit-out contributions and other incentives, is lower than the headline figures. The higher a building's vacancy, the more room there is to negotiate. In Gdańsk this applies above all to Oliwa and Przymorze, where vacancy exceeds 10%.

03 · VACANCY AND AVAILABILITY

VACANCY AT 8.17%, DOWN 1.7 PP OVER THE YEAR

Space available immediately stands at 67,900 m², 19,200 m² less than a year ago. Since the peak in Q3 2023 (10.5%) the vacancy rate has fallen by more than 2 pp; the lowest values are in Osowa (1.68%) and Śródmieście (4.42%).



LARGEST CONCENTRATIONS OF VACANT SPACE

01	Alchemia 2 Etap / Ferrum i Titanium Oliwa · class A · €14.65/m ²	7,661 m ²
02	Cube Office Park B Kokoszki · class A · €13.00/m ²	4,199 m ²
03	Alchemia 3 Etap / Argon Oliwa · class A · €14.50/m ²	3,040 m ²
04	Alchemia I - Aurum i Platinum Oliwa · class A · €14.60/m ²	2,610 m ²

SUBLEASES - HIDDEN SUPPLY (M²)



7,500 m² of sublease space is concentrated almost entirely in Oliwa and Przymorze (97% of the volume), a signal of where tenants are cutting the space they occupy.

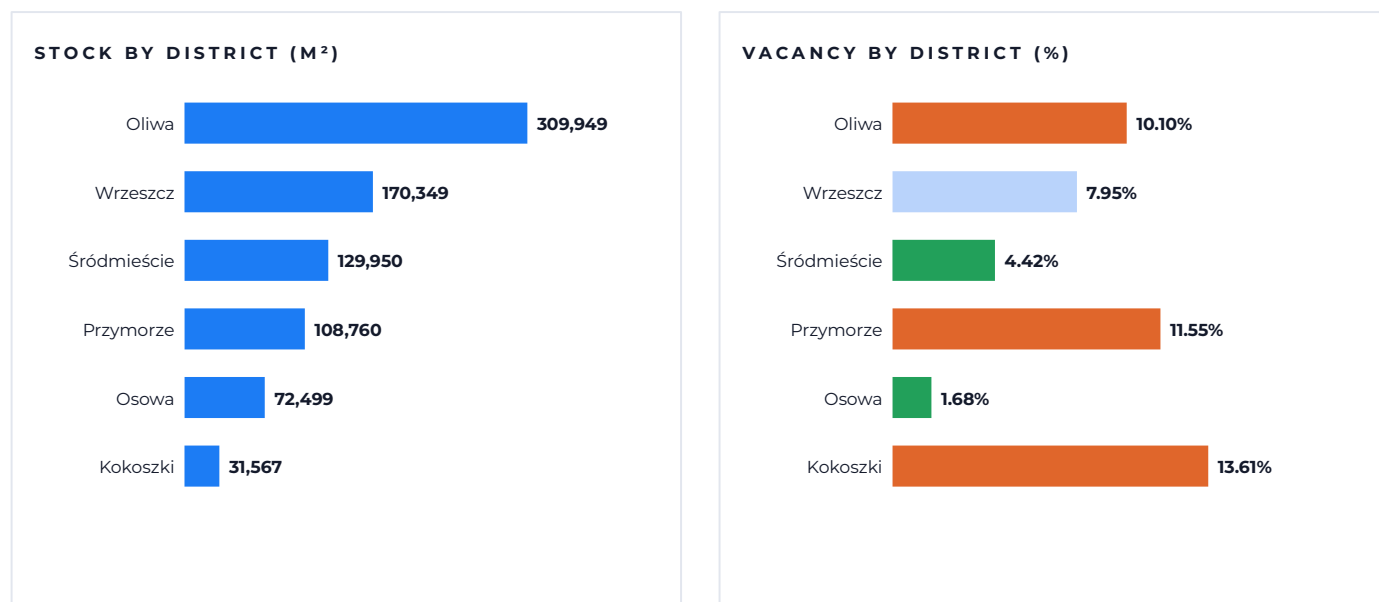
BROOKFIELD PARTNERS PERSPECTIVE

Real supply for a tenant = vacancy + subleases + space released within 12 months. Vacancy and subleases alone total around 75,000 m², 11.1% more than official availability.

04 · DISTRICTS

CENTRE AT 4.42%, OLIWA AND PRZYMORZE OVER 10%

Oliwa, Wrzeszcz and Śródmieście hold 73% of the city's stock. The least vacant space is in Osowa (1.68%) and Śródmieście (4.42%); in Oliwa, Gdańsk's largest office area (310,000 m²), and in Przymorze vacancy exceeds 10%.



DISTRICT	BUILDINGS	STOCK (M²)	VACANCY	VACANT (M²)	SUBLEASE (M²)	RENT (€/M²)	SERV. CHARGE (PLN)
Oliwa	18	309,949	10.10%	31,297	4,014	15.15	24.70
Wrzeszcz	25	170,349	7.95%	13,551	218	16.64	28.23
Śródmieście	14	129,950	4.42%	5,740	-	15.95	21.27
Przymorze	17	108,760	11.55%	12,557	3,287	15.42	25.00
Osowa	14	72,499	1.68%	1,216	-	14.36	26.06
Kokoszkki	7	31,567	13.61%	4,295	-	13.00	26.70

05 · SUPPLY AND OUTLOOK

9,150 M² UNDER CONSTRUCTION

Two schemes totalling 9,150 m² are under construction, against 831,000 m² of stock. Garnizon.biz - Nano in Wrzeszcz (8,500 m²) is due for completion in Q1 2028.

UNDER CONSTRUCTION

BUILDING	LOCATION	M ²
Garnizon.biz - Nano	Wrzeszcz · A	8,500
Słowackiego	Wrzeszcz · A	655

RECENTLY DELIVERED

BUILDING	LOCATION	M ²	YEAR
PUNKT	Wrzeszcz · A	12,714	2025

The most recent completion is the PUNKT office building in Wrzeszcz, about 13,000 m² of new space in 2025.

BROOKFIELD PARTNERS OUTLOOK · Q4 2026

Over the year vacancy fell by 1.70 pp and rents rose by 11.2%, with limited new supply. We expect continued pressure on rents in Śródmieście and Wrzeszcz; in Oliwa and Przymorze, where availability exceeds 10%, the incentive package will remain the main currency of negotiation. For tenants with leases expiring by 2028 we recommend running **a renegotiation and a relocation scenario** in parallel. As an adviser acting exclusively for tenants we do not represent landlords, so our recommendations are free of any conflict of interest.



METHODOLOGY AND DISCLAIMER

Based on OfficeList Pulse data, Brookfield Partners' proprietary analytics platform monitoring 96 modern office buildings (class A and B) in Gdańsk; as of 01.10.2026. Rents: average asking rates for available space; service charges: median of quoted advances. Q3 2026 data reflect an update of the building database. This material is for information only and does not constitute an offer within the meaning of the law.

LET'S TALK ABOUT YOUR LEASE

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