2025 Economic and Real Estate Insight

IN POMERANIA

Foreign direct investment (FDI) in Europe is undergoing a transformation in response to evolving global dynamics. Geopolitical shifts and rapid technological advancements are reshaping the investment landscape. In this environment, regions that prioritize innovation, resilience, and sustainability are emerging as key economic players. Pomerania is one such region—a dynamic hub for international investment, business development, and long-term economic growth.

As one of Poland's most developed regions, Pomerania offers a diverse and competitive economic landscape. It is home to global leaders in technology, finance, and advanced manufacturing, benefiting from a strong talent pipeline fueled by graduates from over 25 higher education institutions.

The region's growing investments in technology and green energy align with Europe's digital and climate transition goals. As global markets shift toward sustainable development, digital transformation, and knowledge-based industries, Pomerania continues to position itself at the forefront of cutting-edge economic trends.

By embracing innovation, sustainability, and global connectivity, the region is shaping the future of the European economy. I invite all stakeholders—investors, businesses, and policymakers—to explore the opportunities that Pomerania offers as a thriving, resilient, and future-ready investment destination.

Mieczysław Struk

Mieczysław Struk, Marshal of the Pomeranian Voivodeship

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General Overview

Poland in a nutshell

Poland ranks 2nd in the world in the Lived Change Index 1990-2019
(The World Bank, conclusions made by Young China Group)

Poland ranks 5th in Europe in terms of the number of FDI projects
(FDI Intelligence Report 2024)

Poland ranks 6th in terms of FDI projects
(EY Attracivness Survey, June 2024)

Area
312,696 km

Population
37.6 mln

1st
Biggest economy in CEE region

1st
In number of workplaces created by FDI in Europe

5th
The value and number of greenfield projects
(Europe)

Pomerania in a nutshell

Pomerania is one of the most economically developed regions in Poland. Its coastal location on the Baltic Sea and excellent talent pool have won numerous FDI projects for the region in various industry sectors.

1.6 mln

Residents in Tricity Metropolitan Area

Tricity

The biggest agglomeration in the Southern Baltic Region

18.3 km

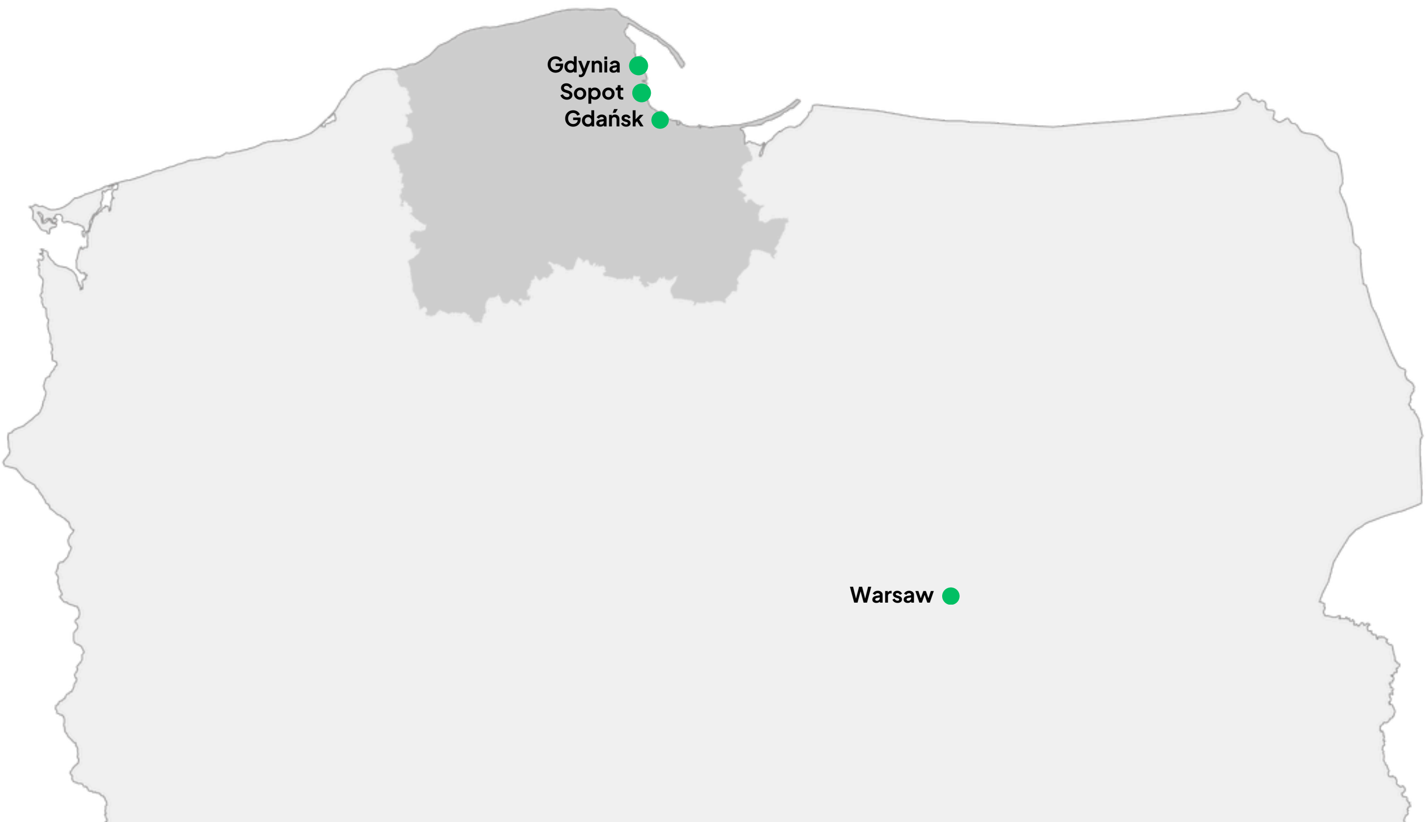
Total area

3 rd

Mid-Sized European Region of the Future 2025 - FDI Strategy
(ranking by Financial Times)

6.4%

GDP growth year to year
(2023)



Transport

Transit

Pomerania has a unique logistic potential, resulting primarily from its excellent geographic location. The region is situated at the intersection of two pan-European Networks, connecting Western Europe with the Baltic States and Scandinavian countries with the Adriatic Sea. The growing network of express-ways and motorways at the regional and national levels is of great importance to the local economy.

Railway

One of the most important TEN-T transport corridors, the Baltic-Adriatic Sea, runs through the Pomeranian Voivodeship.

1/3

of Poland's intermodal inland terminals operate in Gdańsk and Gdynia ports

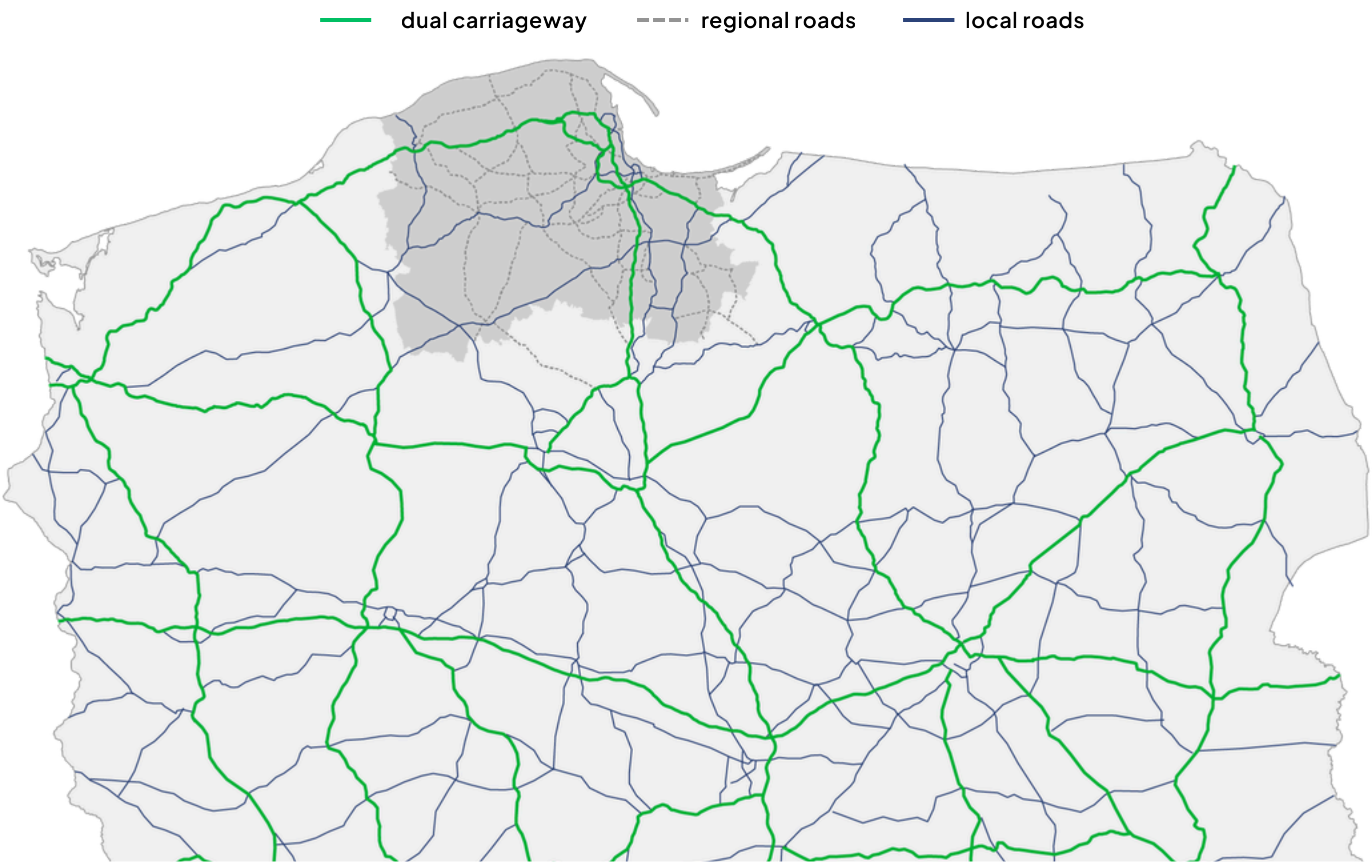
2.5x

more TEU transported by rail than in 2012

16.6%

PKP Cargo ranks 2nd in intermodal transport share
(all traffic)

Polish ports are an important point for cargo in transit for the purpose, among others, mills, factories, car manufacturers or replacement cargo for the Czechia, Slovakia, and Hungary.



Airport

The Lech Wałęsa Airport is the third-biggest regional airport in Poland. Gdańsk Airport offers direct flights to the most important European economic hubs, and the network of connections is constantly growing.

Until 2019, each year, the airport in Gdańsk recorded a steady increase in the number of passengers served. Following a pandemic-induced drop, passenger numbers steadily rose, eventually surpassing pre-pandemic levels in 2023 and reaching twice the number of passengers handled in 2014 by 2024. After expanding the western pier of Gdańsk Airport T2 Terminal, Gdańsk Airport can handle 9 million passengers annually. Higher passenger traffic and increased operations stimulate the Pomeranian economic development.

Number of passengers served

5.4 mln	4.6 mln	6.7 mln
2019	2022	2024

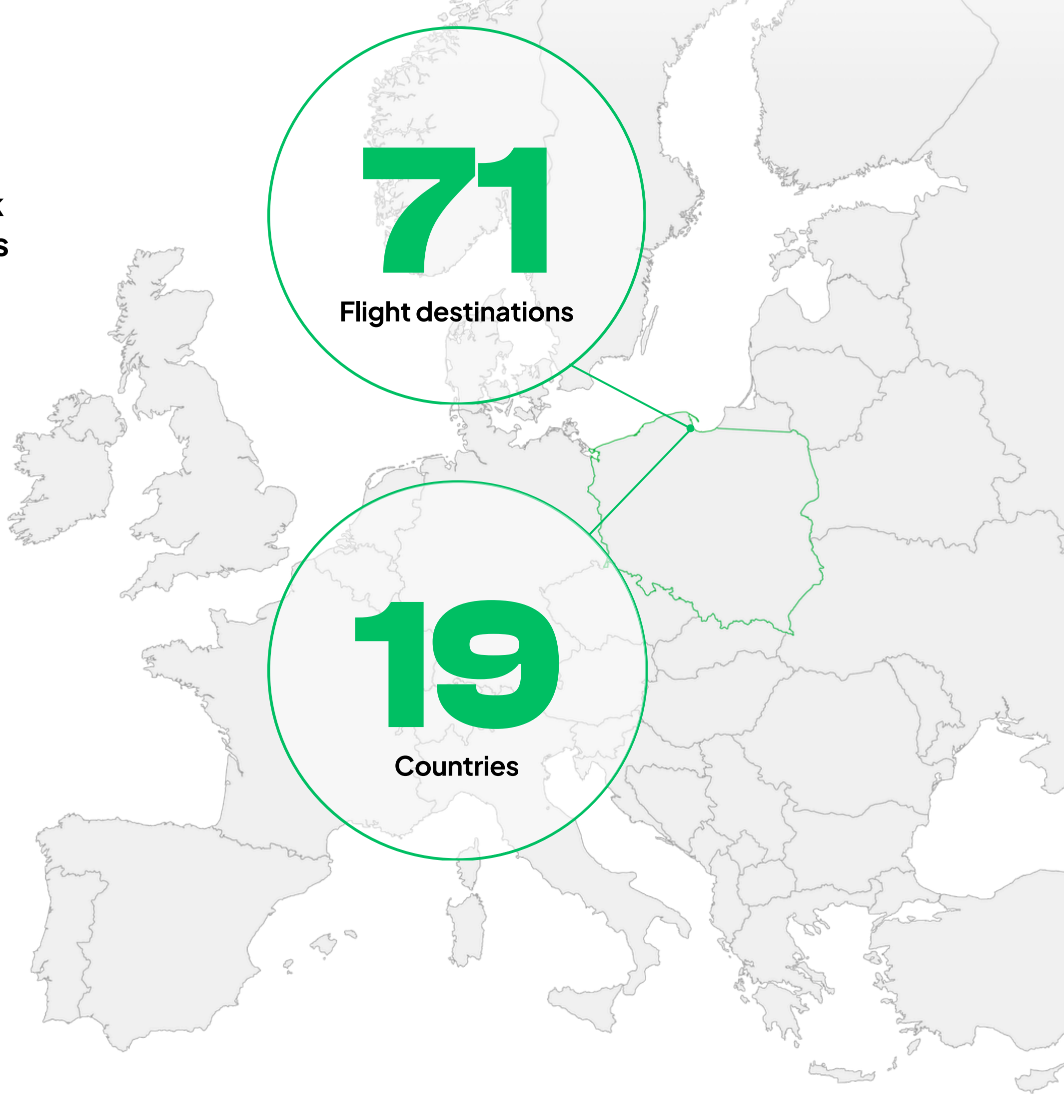
Flight times from Gdańsk to 4 major European hubs

Copenhagen
1h 00min

Munich
1h 35min

Frankfurt
1h 40min

Amsterdam
1h 50min



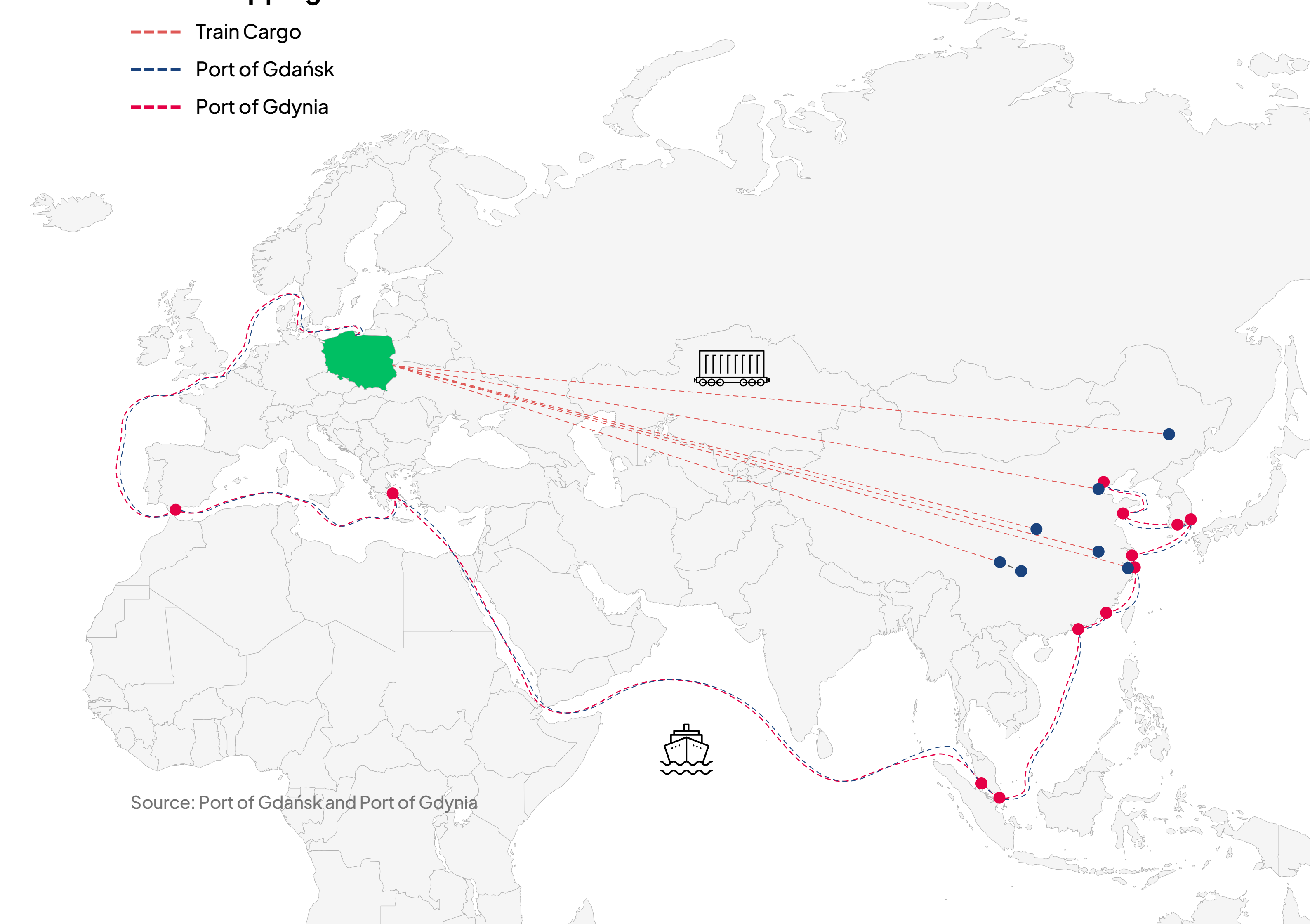
Seaports

Pomerania stands out from all the other regions in Poland due to its coastal location and presence of deep-water ports. The two Pomeranian ports (Port of Gdańsk and Port of Gdynia) handle all kinds of cargo and remain tide- and ice-free all year round. 2024 was a record year for transshipment in the Tricity ports.

In 2024, these ports achieved record results. The Port of Gdańsk recorded a 24% increase in profits compared to 2023, while the Port of Gdynia saw its profits rise by 32%. Container transhipment grew by over 9% compared to the previous year, contributing to the highest operational results in history.

Container handling is undoubtedly the key driver of growth. The main contributor to this result was the Baltic Hub. With direct calls from Asia, the terminal has become a port hub for the CEE region, inhabited by nearly 100 million citizens. Growing global trade, the progressive process of containerization, and expected economic growth in CEE (the fastest-growing region in Europe) will enhance the container business in the next decade.

World shipping connections



Source: Port of Gdańsk and Port of Gdynia

2.2 mln TEU

Transshipped via Baltic Hub in 2023

4.5 mln TEU

Operational capacity (TEU) by 2025

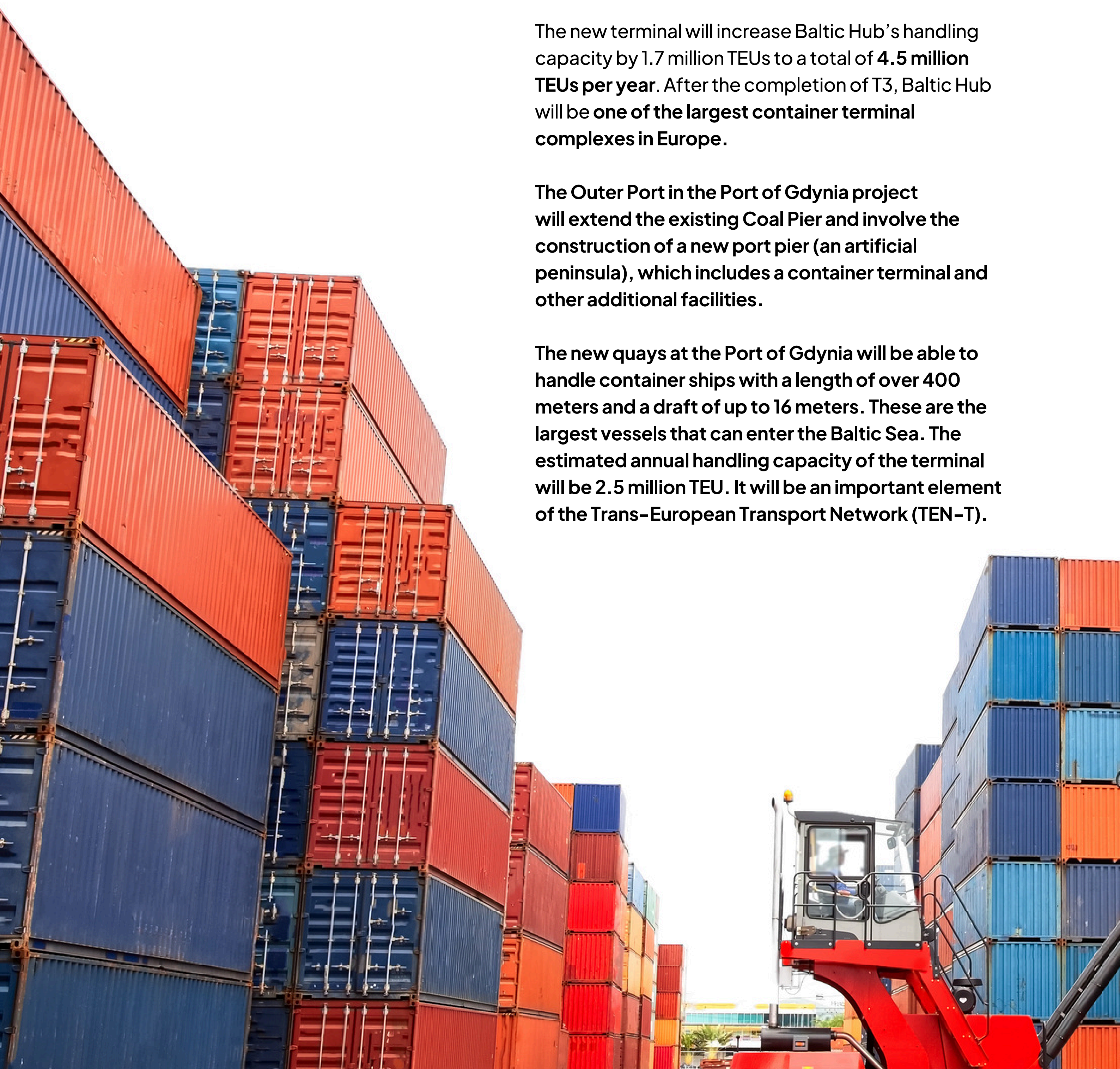
The Pomeranian ports also hold a leading position in the Baltic Sea region in terms of container handling measured in TEUs. This is thanks to the Baltic Hub, Poland's largest container terminal, which has been in operation since 2007. Baltic Hub has signed a contract for the construction of the third deep-water terminal known as T3.

The construction began in October 2022, with full completion of the project planned for the second quarter of 2025. The investment will include a deep-water quay of 717 m long and 17.5 m deep and a yard area of 36.5 ha.

The new terminal will increase Baltic Hub's handling capacity by 1.7 million TEUs to a total of **4.5 million TEUs per year**. After the completion of T3, Baltic Hub will be **one of the largest container terminal complexes in Europe.**

The Outer Port in the Port of Gdynia project will extend the existing Coal Pier and involve the construction of a new port pier (an artificial peninsula), which includes a container terminal and other additional facilities.

The new quays at the Port of Gdynia will be able to handle container ships with a length of over 400 meters and a draft of up to 16 meters. These are the largest vessels that can enter the Baltic Sea. The estimated annual handling capacity of the terminal will be 2.5 million TEU. It will be an important element of the Trans-European Transport Network (TEN-T).



Education

Tricity is the biggest academic hub in northern Poland. There are more than 88 thousand students at Pomeranian universities. The institutions are finely adjusted to the labour market and allow for development and professional careers in Pomeranian Voivodeship. Pomeranian universities are attractive places for international students.

Over the last seven years, the level of internationalization of Pomeranian universities has increased more than twice. Currently, over 5,500 foreigners study in Pomerania (data for the year 2023/2024).

88 K +
Number of active students during 2023/24 academic year

20 K +
Number of graduates during 2023/24 academic year

28
Number of Universities in Pomerania

Top 3

Gdańsk University of Technology rank among technical universities in Poland

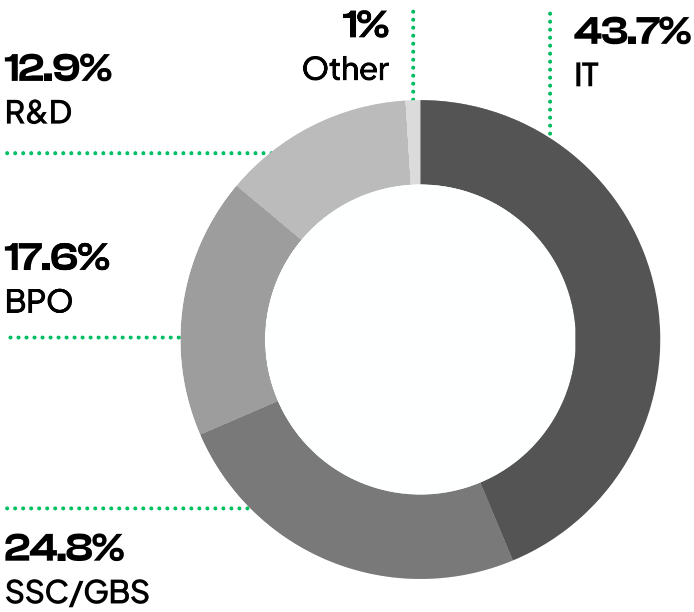
Source: Statistics Poland

Business Services Sector

40,500

Employment in the sector (2024)

The Business Services Sector is currently the biggest commercial employer in Poland, with Pomerania having 40,500 people in over 200 centres. The high number of IT and R&D centres with technologically advanced processes, both among product and service companies, is the dominant characteristic of the Tricity market. The remaining centres operate mainly finance, accounting, and HR processes with an important footprint of financial security processes (AML, KYC- over 2,500 professionals in Tricity).



209

Number of centres in BSS sector

Source: ABSL Business Services Sector in Poland 2024

Types of centres

Most investments come from the US, the Nordics, Germany, and UK/Ireland, but a growing number of projects represent Ukraine, Japan, and India. The modern business services sector, which primarily needs IT specialists is constantly expanding in the region. It is not a coincidence that Tricity was chosen by global giants as one of their preferred locations.

Polish educational system has a rich scientific heritage, especially in mathematics, physics, chemistry, and information technology. On top of strong theoretical background, graduates of Polish technical universities are also very curious - they ask questions of "why", and "how" and look for answers to these questions. It transforms into a true passion. An additional advantage of the Pomerania region is its diversity and tolerance, which roots back to the history of the multicultural free city of Gdańsk. It is a very attractive place to live for many talented engineers, not only from Poland.

Bartosz Ciepluch, Vice President,
Datacenter, AI and Networking Poland General Manager
Intel

IT sector

IT is one of the most dynamically developing industries in Pomerania. As a result, the percentage share of the industry in direct foreign investments is growing every year.

Size of IT centers – FTEs

amazon
~1,500

intel
~3,500

Nordea
>1,700

sii
~1,300

<epam>

~1,700

Lufthansa Systems
> 1,200

IT talent pool in Pomorskie voivodeship

Developers	40,000*
IT Students	6,600
Graduates	1,400/year
Code Academies	1,000+/year

Top programming languages

Java SQL Python Javascript C# C++ .Net

Examples of IT operations in Tricity

ITO

Product Development

Part of SSC

* Own estimates based on EUROSTAT and national statistics (2023)

Maritime and Offshore

Tricity has a thriving port and shipbuilding industry that stands out from the rest of Poland. The Tricity shipyard's product portfolio includes highly specialized vessels, such as cable layers, heavy-lift jack-up, LNG-powered vessels, wind towers, arctic container ships and exclusive yachts.

Among the completed projects, the heavy-lift jack-up Innovation vessel (built by the Crist shipyard) should be mentioned. Cable layer Siem Aimery (built by the Remontowa Shipyard) is another example of advanced projects delivered in recent years. Siem Aimery alone is one of the most expensive and technologically advanced projects ever undertaken by the Polish shipbuilding industry.

Being at Pomerania, generates for us plentiful of potentials as a shipyard to construct, erect and deliver modern ships. CRIST S.A. is famous for building ships using innovate methods, especially taking care of the environment. So we endeavour to implement innovative technologies and advanced applications in shipbuilding with focus on the environment protection by promoting electric or hybrid vessels designed with zero emission at harbour and reduced emission while steaming. To succeed with the market demand, CRIST S.A. is already geared up and ready for the challenges expecting us in key offshore wind farm development trends. Thus our creativity, know-how and the foremost our experience allows us also to stay in competition on global market for EPC construction of modern heavy lift jack-up vessels designated to install wind farms with most demanding windmills of the sizes yet to come.

Daniel Okruciński, Deputy Commercial Director
Crist S. A.

Companies in Pomerania

REMONTOWA HOLDING	Ship repairs and construction of specialized vessels (arctic cont. ships, heavy-lift jack-up, or LNG-powered vessels, hybrid-powered ferries)	CRIST	Construction of heavy-lift jack-up units
EPG	Steel structures for the offshore sector and other energy related industry	Gdańsk Shipyard Group	Construction of wind towers
MOSTOSTAL POMORZE	Construction of steel structures for the maritime industry	KONGSBERG	Deck winches and engine service
NAUTA	Ship repairs		

Current Offshore projects

There are fifteen wind offshore projects under development on the Polish coast. It should be noted that Pomeranian companies are already active within the offshore wind supply chain, providing various types of products and services. This share will steadily increase due to the acquisition of new competences by local suppliers, but also due to the direct foreign investment already taking place in the region. In 2021, Semco ETP Renewables opened a design centre in Gdynia at the Baltic New Technology Port. At the end of 2022, the opening of a competence centre in Gdańsk was announced by Siemens Gamesa. At the beginning of 2023, the Industrial Development Agency, Baltic Towers and the Spanish company GRI Renewable Industries, S.L. signed an agreement to establish a wind tower factory for offshore wind energy in Gdańsk.

11 GW

Current wind offshore projects on the Polish coasts by 2040

33 GW

The potential for the whole Polish coast by 2040
(PSEW.PL)

Yacht manufacturing

Sunreef Yachts LUXURY CATAMARAN MANUFACTURER · CONRAD SHIPYARD · GALEON

The Polish yacht industry is the world leader in the most popular segment for 6-9 m long motor boats (Poland is second, after the USA, in the category). Pomerania region has become one of the EU's top yacht suppliers.

9th

Global export of yachts
(2022)

5th

Export of yachts
(Europe)

2nd

Global construction of motor yachts
(up to 9 m long)

22,000

Annual production of motor and sailing yachts in Poland

Automotive

Poland has long been a leading European automotive manufacturer, while Pomerania's coastal location and growing port infrastructure offer significant growth potential for the sector.

We have chosen Gdańsk city, located in Pomeranian Voivodeship, for operation of Northvolt's production plant in Poland. Many analyses highlighted the advantages of this location, including logistics aspects and access to qualified workforce. Support for the investment process provided by the local authorities and organisations like Invest in Pomerania was crucial. We appreciated also access to renewable energy (more than 50% of energy production in Pomeranian region comes from renewable sources) and introduction of pro ecological solutions, like electric public transport.

Anna Sobolewska, Communications and Public Affairs Director
Northvolt Systems Poland Sp. z o.o.

Production in the sector

- Advanced technology for autonomous driving
- Lithium batteries for e-cars
- Semi-trailers
- Trucks and buses
- Garbage trucks
- Chargers for e-cars

Electronics

The electronics sector is a key driver of Pomerania's economy, attracting international companies. They manufacture cameras, lighting systems, control panels, telecom devices, circuit boards, data centres infrastructure, as well as develop firmware.

Flextronics International Poland Sp. z o.o. is a world-class manufacturing partner in the electronic industry which executes orders for the top companies from the telecommunication, consumer and industrial electronics sector, as well as other related industries. With excellent transportation location possibilities by air, land and sea we become an attractive area for international investments. Close cooperation with the research centres and local universities, like the Gdańsk University of Technology and the University of Gdańsk, allows us to hire educated workers with good qualifications in terms of technical abilities and knowledge. Our industrial park has currently 4 buildings with a total area of 80,000 sqm with employment rate exceeding 4,000 workers. Support for entrepreneurs creates Pomerania Voivodeship a place with a variety of diverse economies, which is the foundation of new and advanced technology. All of the above makes it a perfect place for investments and development.

Stanisław Motylski, General Manager
Flex Poland

Key sectors

- Telecom
- Automotive
- Defence
- Security
- Smart Home
- Industry 4.0

Chemistry and Biotechnology

Pomerania's strong chemistry and biotechnology sector is driven by three factors: a strategic location with developed transport infrastructure, access to specialized talent, and robust R&D facilities.

Key companies

Biggest Polish cosmetics producer, offering products for face, body and hair care.

Biggest Polish pharmaceutical manufacturer, with around 2,200 employees in Pomerania. It produces drugs used in cardiology, gastroenterology and neurology, as well as over-the-counter drugs.

Polish company, offering antiallergic cosmetics, products for sensitive skin, dermocosmetics, as well as drugs and medical products.

Innovative medtech

Enzyme producer, with laboratories in Gdynia and Gdańsk. From 2021 the company set up a 5-year long investment for 10 mln PLN in order to develop their laboratories.

Producer of assistive devices and patient-handling equipment. The company has been operating in Pomerania since 2020, with target employment of 250 people.

The company works on innovative diabetes treatment and was created by scientists from the Medical University of Gdańsk.

The clinic carries out research and development projects, being a precursor of new solutions in the field of infertility treatment and diagnostics.

Heavy chemistry

(The ORLEN Group)

Lotos Lab provides services in the field of sampling and laboratory testing of petroleum products, water and sewage. It conducts research and development activities in the area of processing and use of petroleum products.

In cooperation with:

Colliers

JLL

VISIT GDANSK | Gdansk Convention Bureau

Real Estate Market

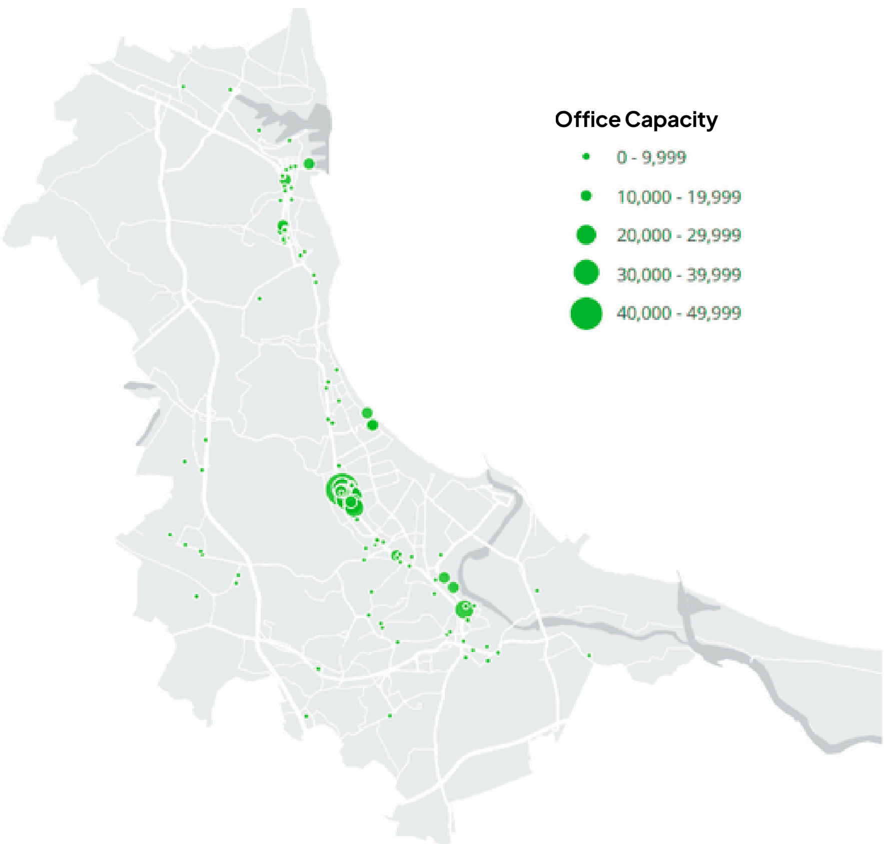
Office market

With over 1 million sqm of office space, Tricity ranks as Poland's third-largest regional office market. In 2024, three buildings—Waterfront II (1 & 2) and Silk (LPP Fashion Lab II)—added 19,500 sqm, while 56,100 sqm remained under construction for future completion.

The hybrid work model continues to shape tenant requirements in significant ways, with organizations strategically optimizing office spaces to enhance efficiency, attract talent, and promote employee well-being. Tenants activity in Tricity remains stable, though we observe an increasing proportion of lease renegotiations rather than new agreements. This trend partially explains the constrained construction activity across the office sector. The Tricity market experienced historically low supply in 2024, with merely 21,100 sqm of new office space delivered - the lowest figure on record. This slowdown in development has contributed to the stabilization of vacancy rates, which had been steadily increasing over previous quarters. Despite market adjustments, demand remains robust for high-quality office products. High-standard buildings located in prime central locations continue to generate substantial tenant interest and are projected to maintain this advantage moving forward.

Agnieszka Grzywaczewska, senior associate,
Colliers

Distribution of Modern Office Space in Tricity



Gdańsk holds 75% of office space, followed by Gdynia (22%) and Sopot (3%). Most modern offices are along the Szybka Kolej Miejska (Fast Urban Railway) route, Droga Gdyńska, and al. Grunwaldzka (Wrzeszcz, Oliwa), with additional projects near Gdańsk airport and the city center.

Selected occupiers

Tenant	Building
Amazon	Olivia Centre: Prime, Point, Tower
Arla Foods	Centrum Biurowe Neptun
Boeing Poland	Arkońska Business Park
Carrier Polska	Heweliusza 18
IHS Global	C200
Nordea	Olivia Star, Tensor, Łużycka Office Park
PwC	Olivia Star
Sii	Olivia Prime
State Street	Alchemia II Ferrum i Titanium
Wipro IT Services Poland	Wave A

In 2024, gross take-up in the Tricity office market reached 116,300 sqm, with renegotiations dominating at 50%—a 4 p.p. increase from 2023 and the highest in recent years. New leases accounted for 41%, while owner-occupied deals and expansions made up 6% and 3%, respectively. The average lease size dropped by 26% YoY to over 980 sqm. Major transactions included State Street Bank's 10,500 sqm renegotiation (Alchemia II), Arla Foods' 8,900 sqm relocation (PUNKT), and a 7,900 sqm renegotiation by a confidential tenant (Olivia Prime). The vacancy rate stood at 12.5% at year-end, down 0.8 p.p. from Q4 2023, with 133,500 sqm of available office space. Gdynia's vacancy rate (21.8%) remains significantly higher than Gdańsk's (9.5%).

1 mln	27 k	12.5%	3 rd
Total stock in Tricity in 2024	Flexible office space stock	Vacancy rate in Gdańsk	The largest regional market for modern office projects

Total gross take-up (sqm)

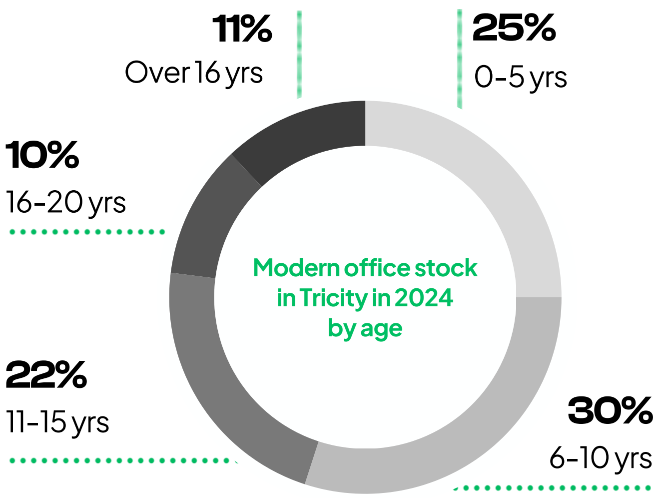
116k+

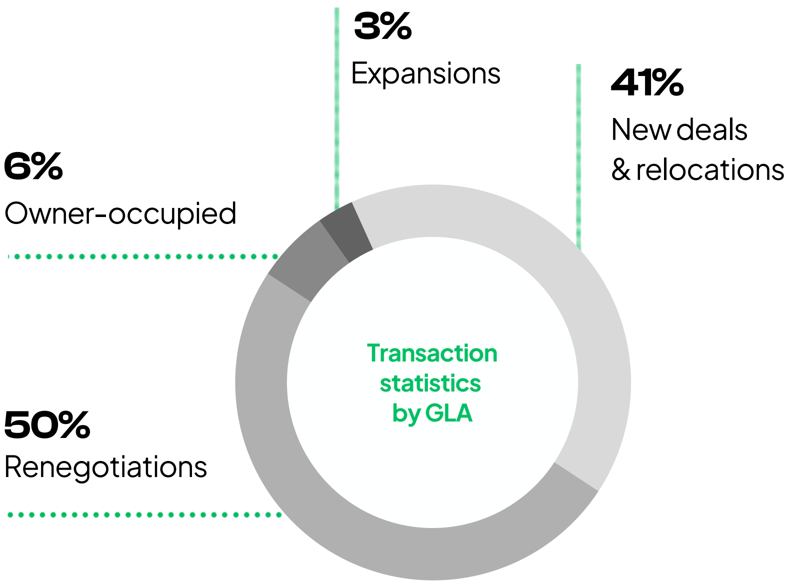
Rental rates in class A buildings (sqm/mth)

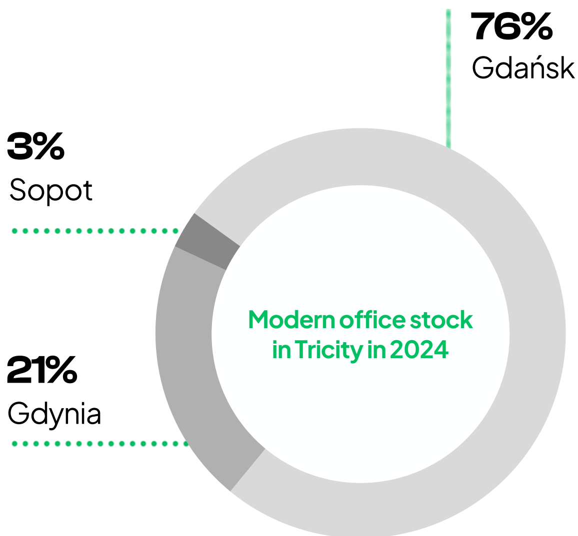
€14-16

Rental rates in class B/B+ buildings (sqm/mth)

€11.5-13







Warehousing market

JLL

The industrial and logistics stock in the Tricity area is spread across 36 parks, collectively exceeding 1.6 million sqm placing it among the most significant regional markets in Poland. Tricity is one of the most dynamically growing markets in the country, having almost doubled in size over the past three years. The majority of the logistics stock offered in the region is concentrated in Gdańsk-Kowale, Gdańsk Airport, Refinery, and Port, which together account for approximately 75% of the existing space.

After several quarters of highly dynamic expansion, a nationwide slowdown was observed, and Tricity noted a reduction in constructed space as well. Nevertheless, as of Q3 2024, developers were actively working on 126,000 sqm of warehousing space. Most of this space will bolster the aforementioned, most significant subzones. Additionally, the extension of the S7 expressway, serving as a new ring road for Gdańsk, will undoubtedly trigger new developments in the western part of the agglomeration. This has already been demonstrated by the commencement of construction on a new BTS (Built To Suit) facility in Tuchom. Meanwhile, areas outside the agglomeration have also gained significance, with Tczew being the leading example.

Key figures for Tricity

156,500 sqm

Gross demand (Q3 2024)

1,618,200 sqm

Total stock (Q3 2024)

126,400 sqm

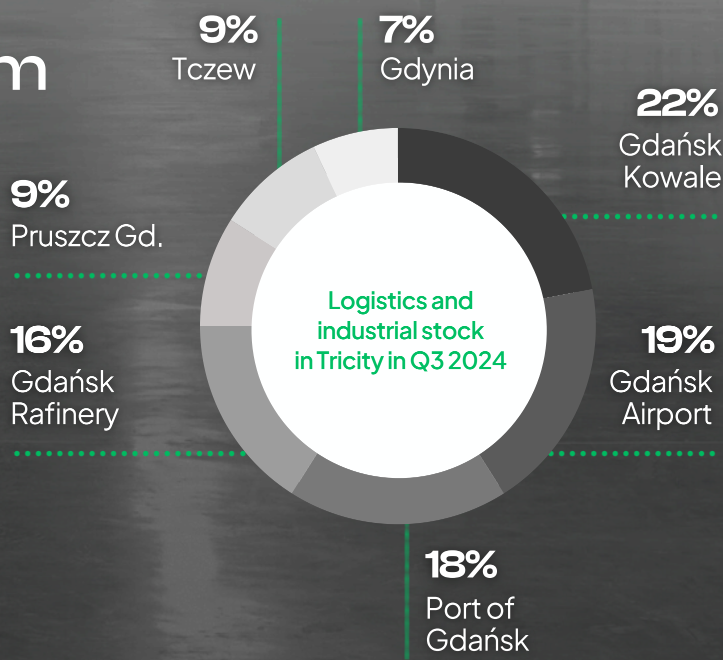
Under construction (Q3 2024)

6.5%

Vacancy rate (Q3 2024)

€4.5 - 5.5

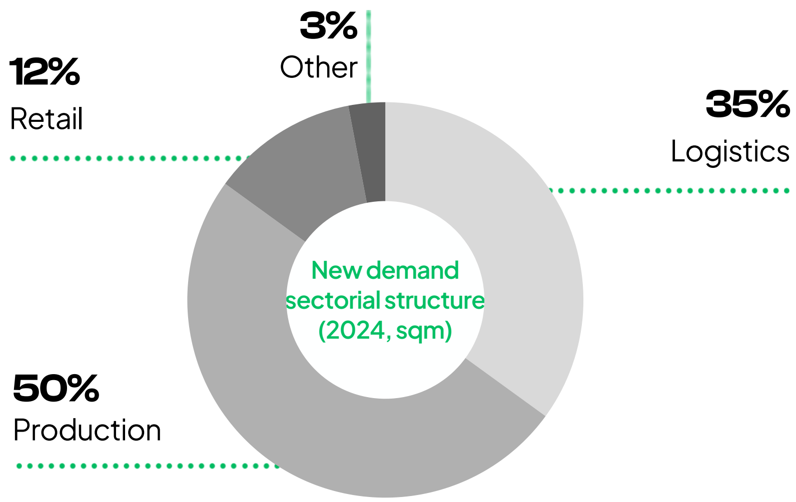
Headline rent (sqm/ mth)



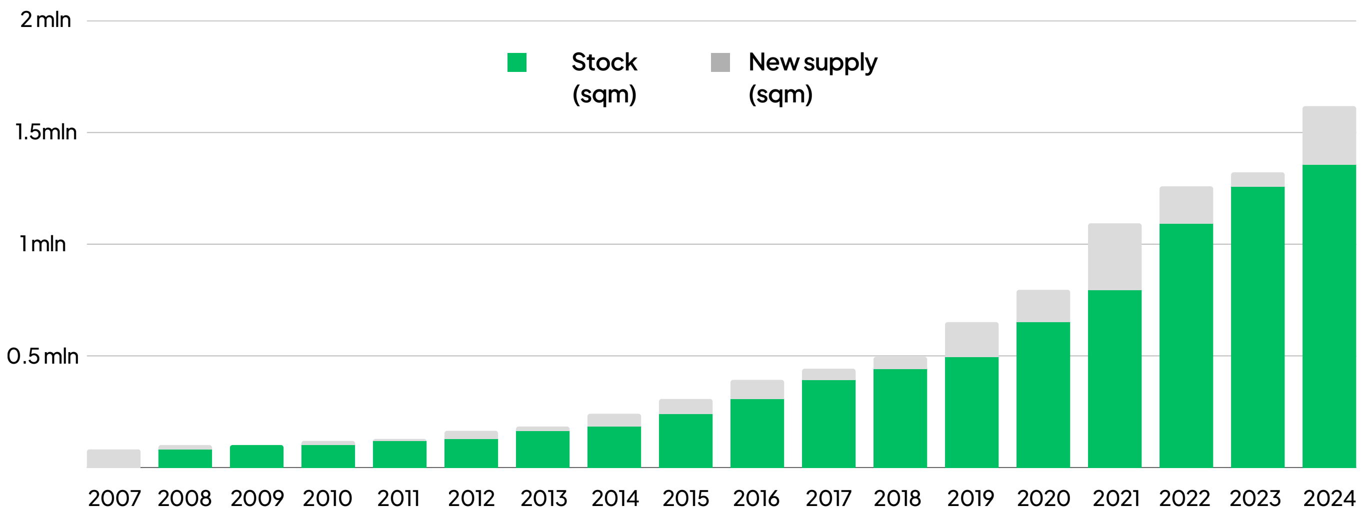
Demand in the Tricity market has generally been driven by logistics operators and retail chains, which accounted for over 70% of total take-up between 2020 and 2023. However, due to factors such as nearshoring and reshoring movements, 2024 has seen increased activity from production companies, which were responsible for approximately 50% of the total new demand noted in Q1-Q3.
Due to the previously elevated development activity combined with subdued demand, affected by challenging economic conditions, the vacancy rate in the Tricity area increased, reaching 6.5% at the end of Q3 2024. Nonetheless, it is still at relatively healthy level, especially considering the currently reduced area of constructed space.
A limited construction pipeline has solidified the rental values, which remained untouched in Q3 2024. A slowdown in development is also anticipated to temporarily ease the pressure on older assets, where some marginal downward corrections were observed. In Q3 2024, rental rates for suburban logistics parks within the Tricity ranged from 4.5 to 5.5 euros/sqm/month.

Tricity is one of the most meaningful regional logistics markets of Poland. Affluent local consumer market, expanding road network and its' distinctive features such as access to the prosperous Baltic Hub, the Gdańsk Deepwater Container Terminal (DCT), are among the strongest drivers boosting logistics and industrial activity in the region.

Maciej Kotowski, Director,
Research and Consultancy JLL



Stock evolution in Tricity (mln)



Source: JLL

Residential market

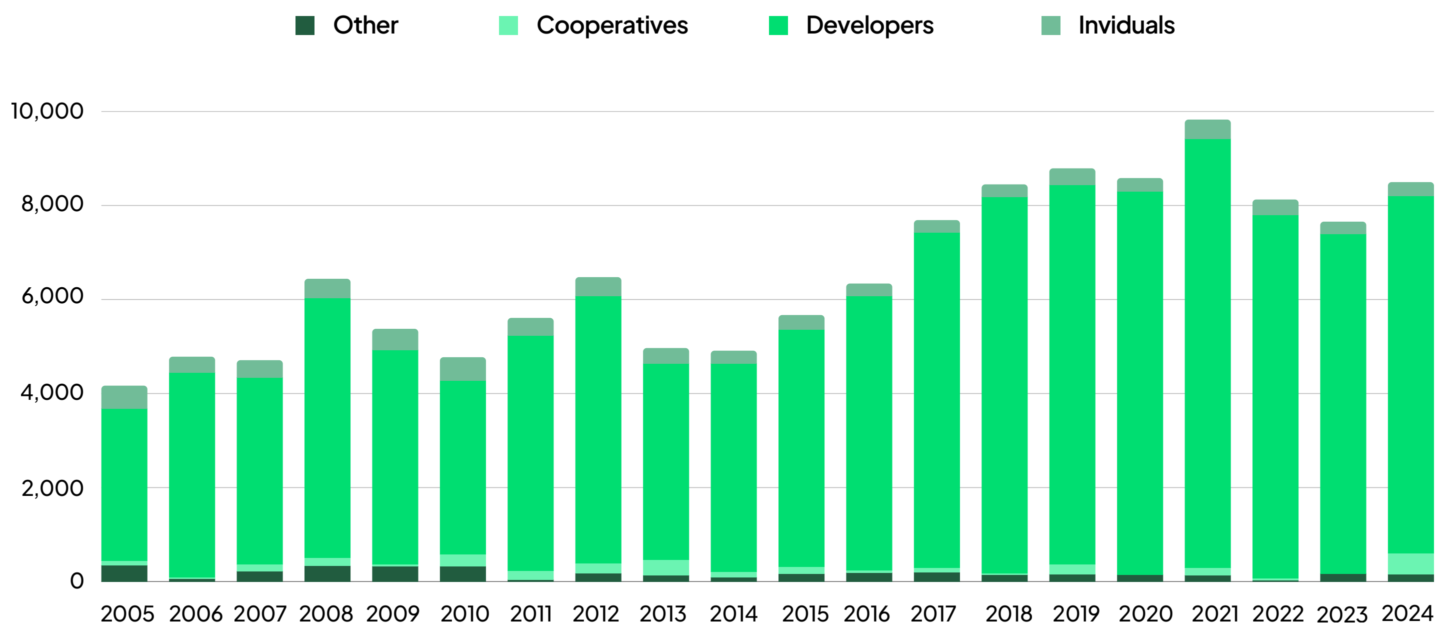
Similar to other main residential markets in Poland, the supply of new housing in Tricity has seen a remarkable growth trend over the years. The number of dwelling completions rose from around 4,000 in 2005 to almost 10,000 in 2021. In 2022 and 2023, the number of flats completed decreased, however, it was still at a very high level. In 2024, the number of apartments delivered returned to the upward trend, with almost 8,500 completed apartments. In the case of multi-family construction, private developers had the lion's share of the annual production - between 85 and 95%.

Developers in Poland focus on building flats for sale, but in recent years, the activity in the institutional private rental sector (PRS) has also been growing quite dynamically. Currently, in PRS, there are approx.1,000 operating units, nearly 2,000 in 7 projects under construction, and another 2,500 units in the planning stages.

Number of completed dwellings

4,000	8,500
2005	2024

Residential Completions in Tricity by Investor Type (2005-2024)



Source: Statistics Poland

The Tricity consists of three residential markets of a slightly different nature.

Gdańsk

The largest of them is Gdańsk, where around 75-80% of all new flats in agglomeration has been completed. In 2024 it was 76%. During the boom period, developers have been completing annually in Gdańsk about 6,000 - 7,000 residential units. In 2024 it was slightly less, nearly 5,800 units.

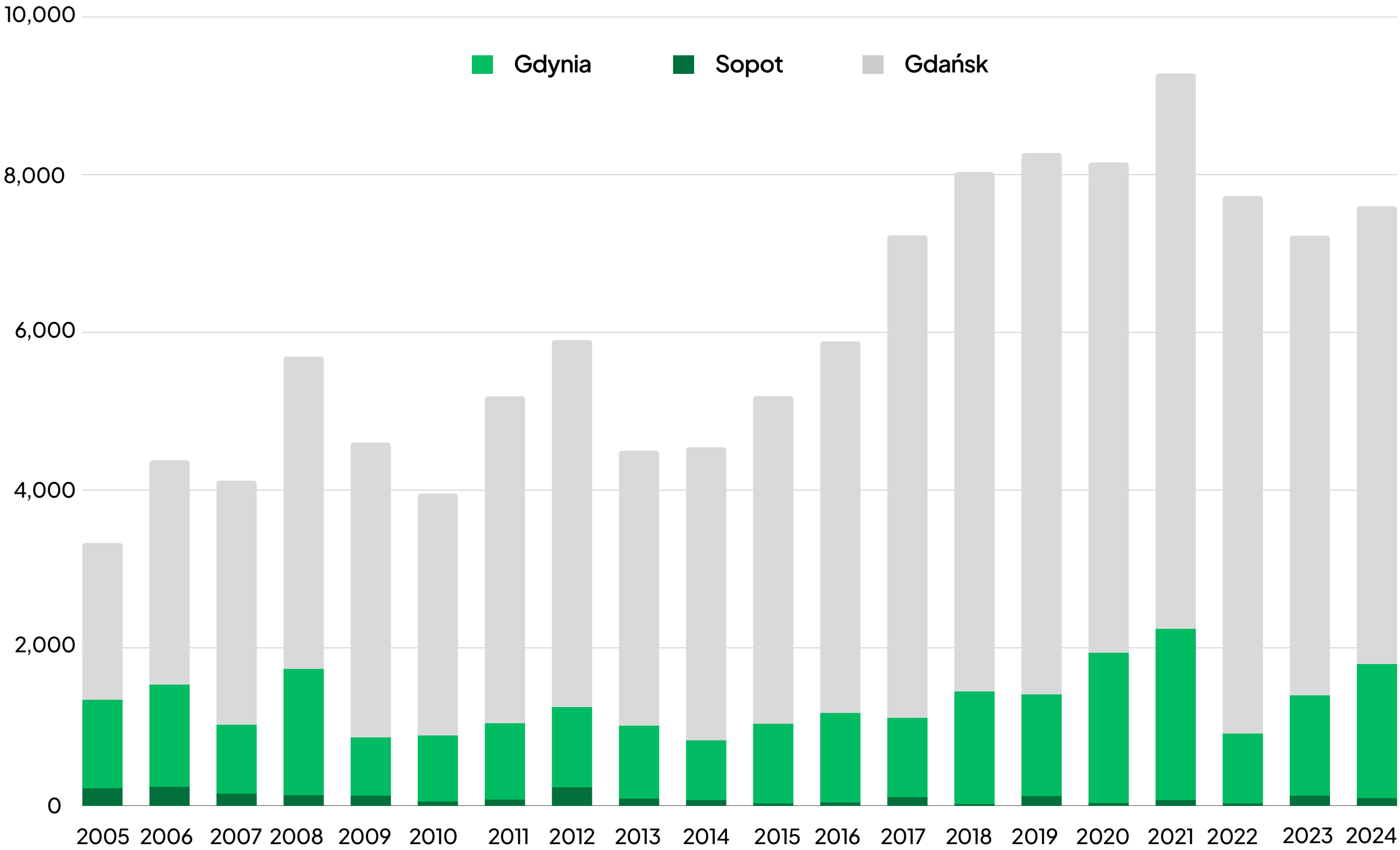
Sopot

In terms of developer activity, Sopot is the smallest market, where only several dozen apartments are delivered every year. This is mainly due to the small size of the city and unique character of it (as a tourist and health resort) as well as the limited possibility of building larger multi-family projects.

Gdynia

Annual completions in Gdynia varied from 700 to over 2,000 units and usually included units belonging to all market segments: from popular affordable apartments through centrally located infill buildings to luxury marina type apartments. The results of 2024 were quite good: almost 1,700 delivered units.

Residential Completions by Developers in Gdańsk, Gdynia and Sopot

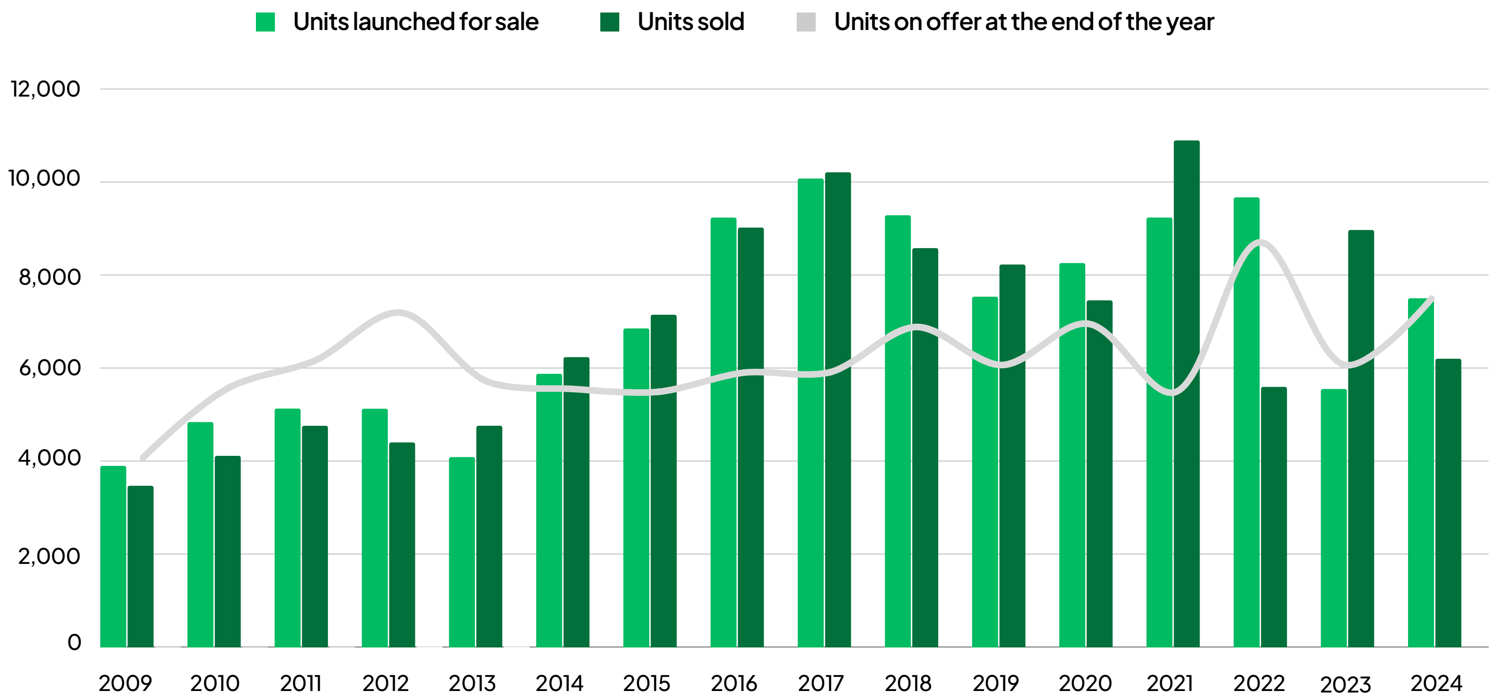


Source: Statistics Poland

The current state of the new residential market

The Tricity market competes with Kraków and Wrocław for second place in the country in terms of the number of units sold annually on the primary market. In the whole of 2024, the sales in Tricity were slightly higher than in Kraków and Wrocław and Tricity ranked second.

In the case of the Tricity, the high popularity of short-term rental had a great importance due to the tourist nature of the region. The cumulation of positive factors in 2016-2021 resulted in the best sales numbers in the Tricity in that period. A record result was noted in the 2021 year - almost 11,000 units sold. After a sharp decline in 2022 and a rise in 2023, sales in 2024 fell to 6,200 units. This was due to the expiration of the buyer support program, a significant drop in buy-to-let demand, and still high mortgage interest rates.



Source: Research and Consultancy JLL

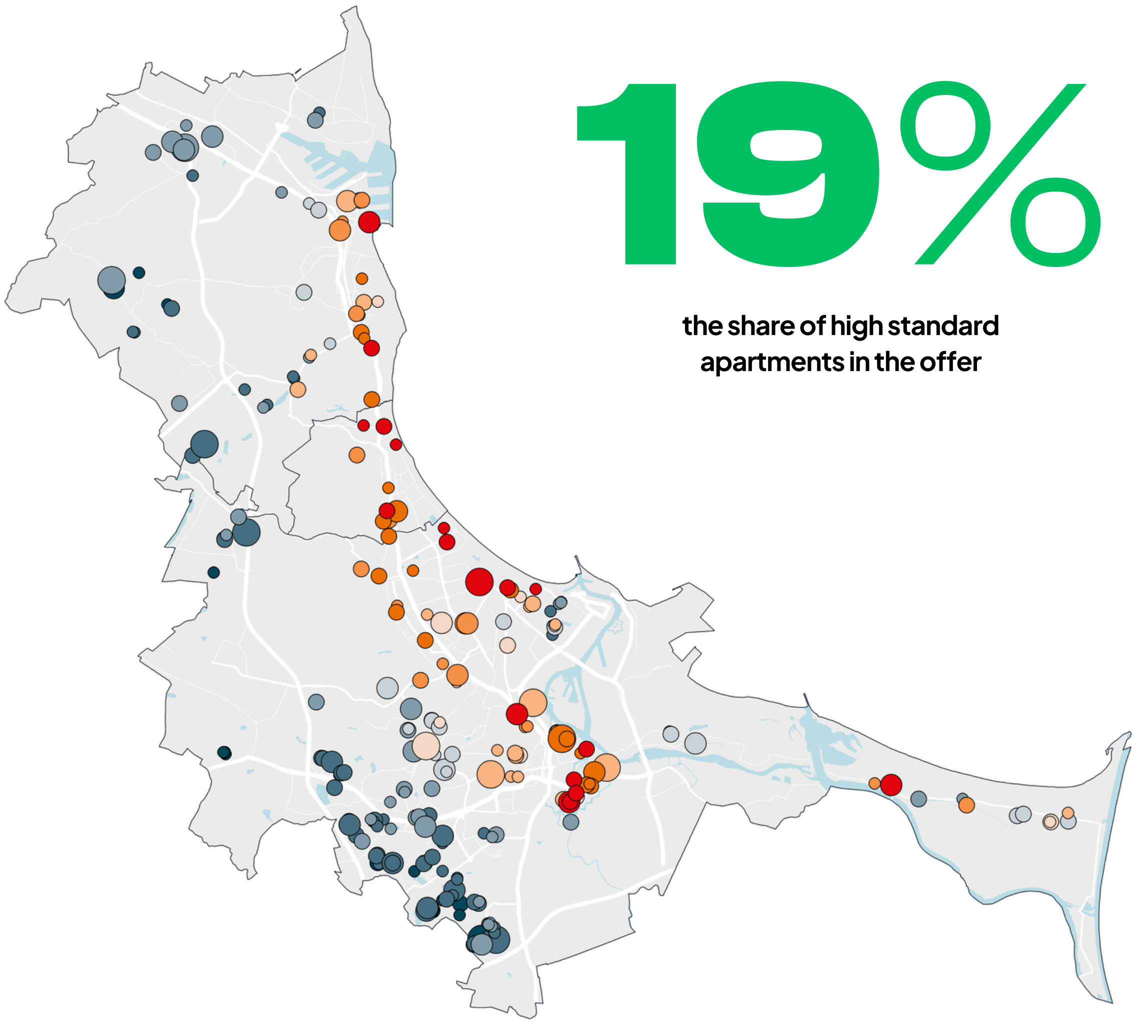
Geography of the offer

Combined access to cultural events, monuments, beaches, and business, several areas can be distinguished in the region, mainly the seaside area, city centre projects and projects located in the south of Gdańsk. 17% of the offer are high-standard apartments, located in the most attractive areas of the Tricity, in the coastal strip. Developments in the vicinity of the historic Old Town in Gdańsk, Sopot, as well as on the SKM railway axis, which provides excellent transport connections throughout the Tricity and with nearby towns, are also highly valued.

Looking at the geographical distribution of the offer, two price belts can be noticed - more expensive projects located along the coast and apartments of a lower standard in the western part, close to the administrative border, along the Tricity beltway. At the end of Q4 2024, units at low-end standard accounted for 51% of the offer and their average price was up to 12,700 PLN/sqm.

19%

the share of high standard apartments in the offer



It is worth emphasizing that compared to other major metropolitan areas, in Tricity the number of offered apartments in the high standard to the total offer is one of the largest. In Q4 2024 it accounted for 19,0% of the offer, i.e. 1,400 best-quality residential units. Tricity is the second biggest high-standard residential market in Poland, just behind Warsaw.

Between 2012 and 2016, the prices of residential units in Poland were quite stable. In Tricity, prices entered the path of intensive growth in mid-2017. It was the second market, after Warsaw, in which in mid-2020 the threshold of 10,000 PLN/sqm was exceeded. At the end of Q4 2024, the average gross asking price of a residential unit in the Tricity was 16,800 PLN/sqm. The Tricity, just behind Kraków, ranked third in terms of the average price per square meter among the six biggest markets in Poland.

Tourism and hotel market

The Pomeranian Voivodeship has been one of the most frequently visited regions in Poland for many years. Before the outbreak of the pandemic, over 3 million people annually used accommodation facilities, including 0.5 million foreign tourists. These data come from the Central Statistical Office and do not include short-term rental facilities, so the actual number of guests is several times higher.

Travel restrictions related to the COVID-19 epidemic had a significant impact on tourism. In 2020, the number of visitors dropped by 40% to 2 million. However, in 2021, the number of overnight guests in accommodation facilities increased to 2.4 million. By 2022, this number returned to its pre-pandemic level of 3.3 million. In recent years, the number has continued to grow, peaking at 3.7 million tourists in 2024.

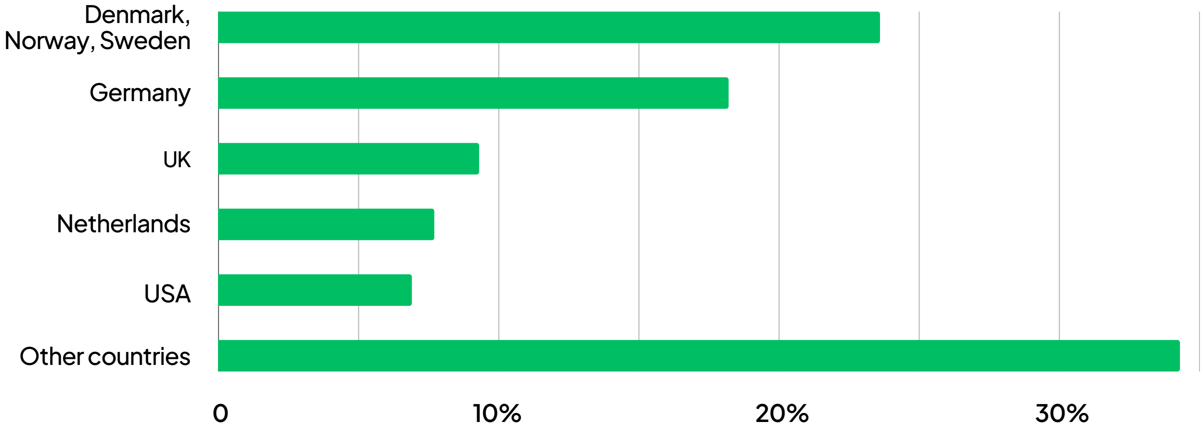
For many years, the largest group of foreign visitors came from Germany. However, in 2022 Scandinavian countries took their place as the largest group of tourists. The next positions were taken by the United Kingdom, the Netherlands and the United States of America. The importance of tourism for the development and condition of the region is evidenced by the expansion of the accommodation base. Over the last 10 years, the number of hotels has increased by 26%, while the number of 5* and 4* facilities has more than doubled - from 22 to 56.

Tourist situation before and after the Pandemic

1.9 mln	3.3 mln	1.9 mln	2.4 mln	3.3 mln
2012	2019	2020	2021	2022

Today, guests visiting Pomerania have at their disposal over 27,000 bed places in hotels, including over 11 thousand in 5* and 4* hotels.

Foreign tourists by country in 2023



Our Support

Data analysis

Comprehensive information on the region's economy, key industries, real estate, HR and legal regulations

Investment offers

Information on currently available investment plots and warehouses

Incentives

Comprehensive information on the currently available financial and operational incentive

On-location visits

Organized and planned location visits, including reference visits with strategic HR and RE agencies and visits to the actual investment locations

PR & Marketing

Media announcement of the new investment via a press release or a media event

Investment support

Support in all matters related to setup and construction

Employer branding

Creating bespoke campaigns to brand the company as an attractive employer via our Live more. Pomerania initiative

Talent attraction

Access to Poland’s first-ever market-driven, profile-led recruitment platform, for free

Business development

Introduction to local business community, matchmaking and joint marketing efforts at conferences

Investor Spokeperson

Comprehensive support in all things administrative, e.g residence and work permits

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