Invest in Pomerania

2026

Economic and Real Estate Insight

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

Opportunities | FDI

Poland ranks 6th in Europe in terms of the number of FDI projects
(FDI Intelligence Report 2024)

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

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

4th
In number of workplaces created by FDI in Europe

6th
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.

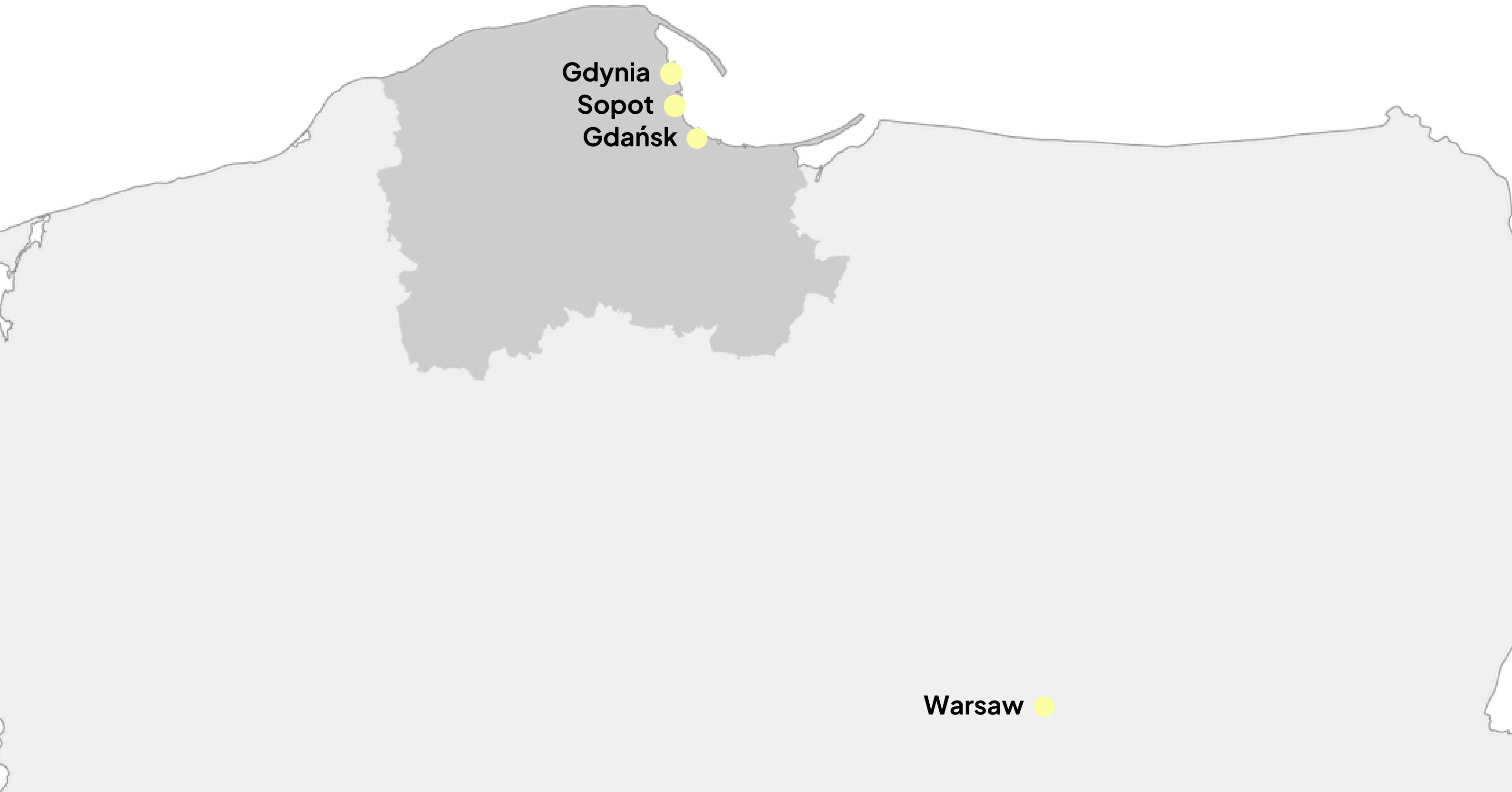
1.6 mln
Residents in Tricity Metropolitan Area

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)

3.8 %
GDP growth year to year
(2024)



Transport

Transit

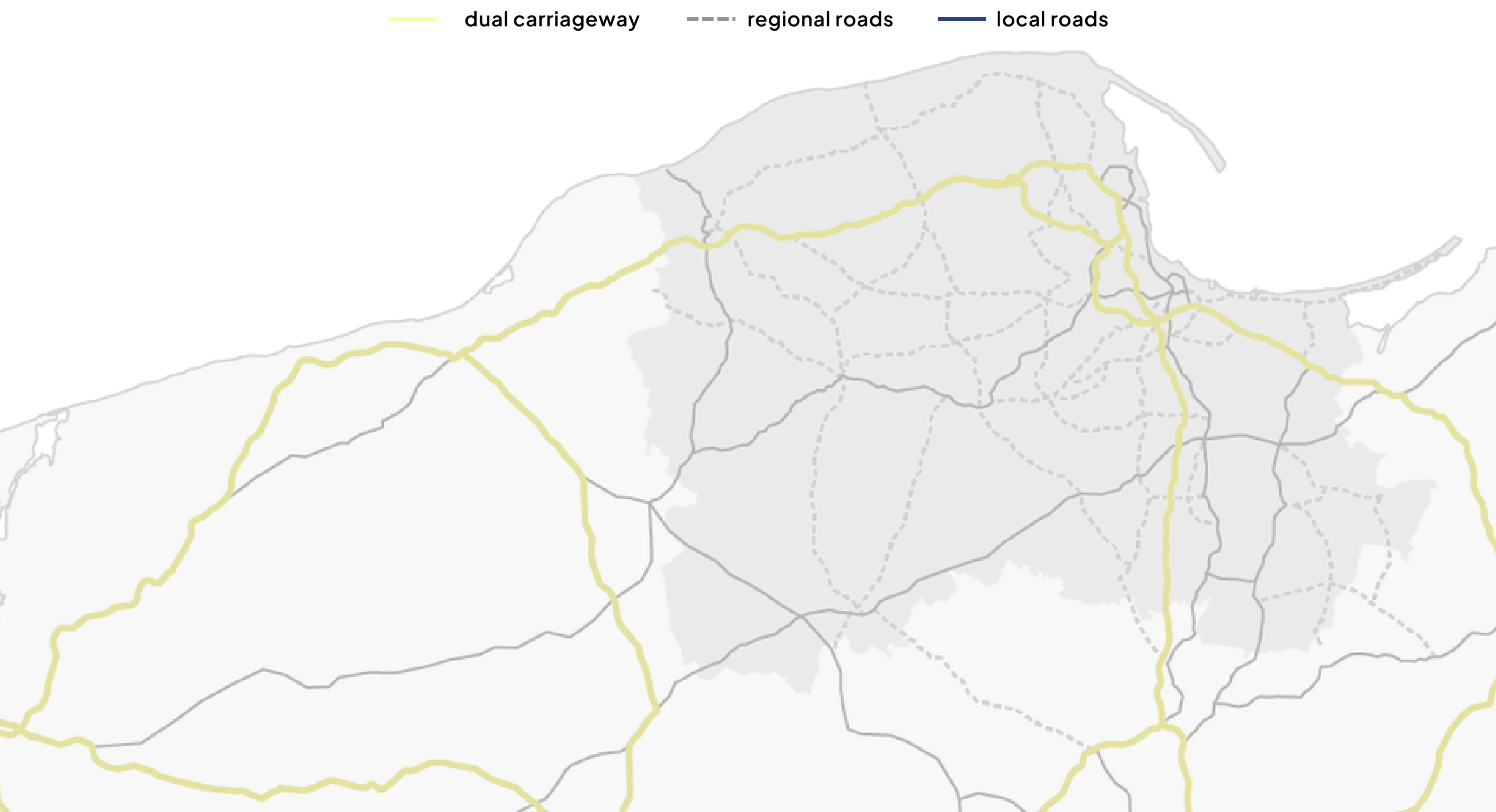
Pomerania has a unique logistic potential, resulting primarily from its excellent geographic location. The region is situated at the intersection of two pan-European Networks, connecting Western Europe with the Baltic States and Scandinavian countries with the Adriatic Sea. The growing network of express-ways 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	2.5 x	19 %
of Poland's intermodal inland terminals operate in Gdańsk and Gdynia ports	**more TEU transported by rail than in 2012**	**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

2019	2022	2025
5.4 mln	4.6 mln	7.4 mln

Flight times from Gdańsk to 5 major European hubs

Copenhagen
1h 00min

Munich
1h 35min

Frankfurt
1h 40min

Amsterdam
1h 50min

Istanbul
2h 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. 2025 was a record year for transshipment in the Tricity ports.

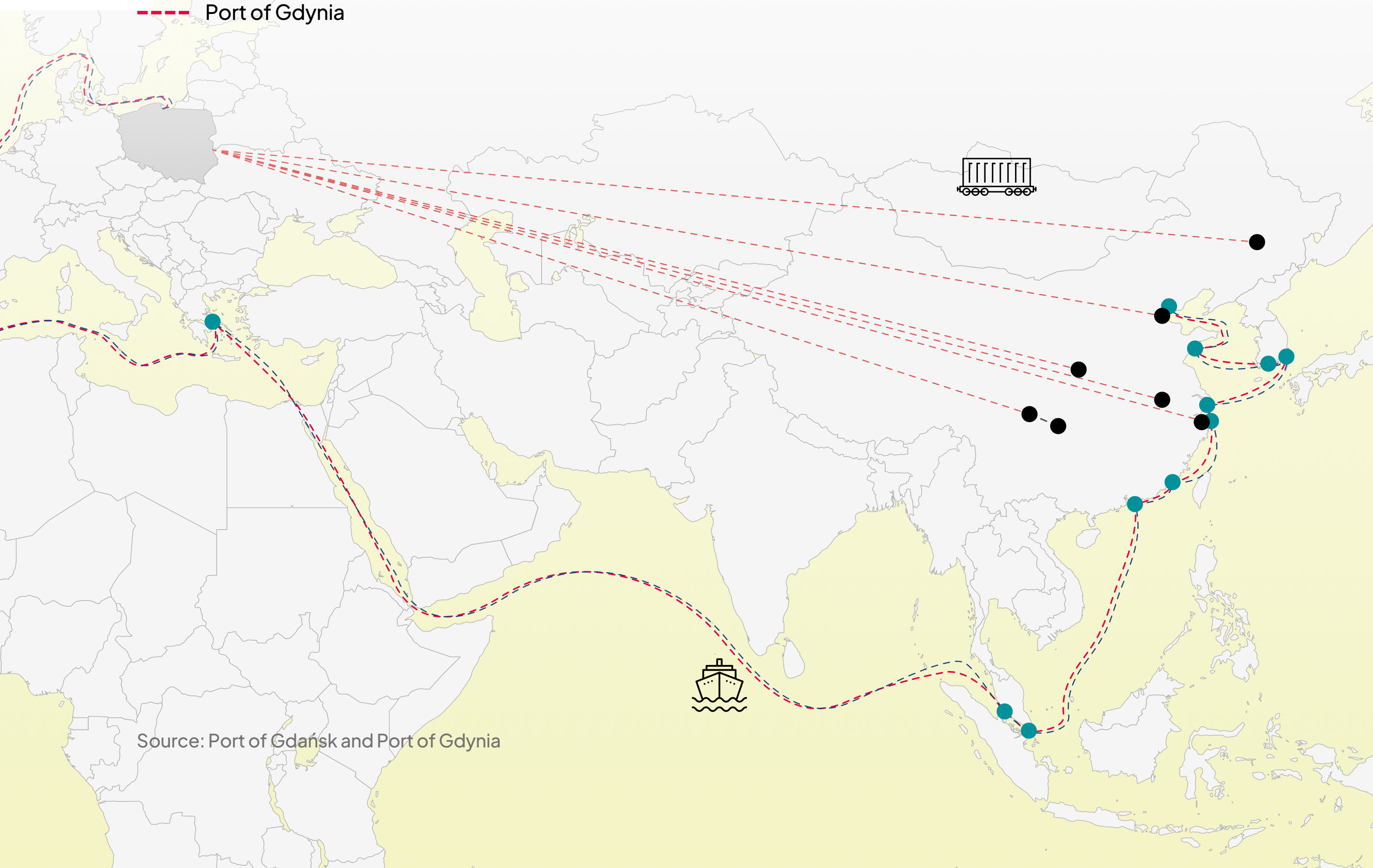
In first half of 2025, these ports achieved record results. The Port of Gdańsk recorded a 40% increase in profits compared to the first half of 2024. In 2025, the Port of Gdynia exceeded the barrier of 1 million TEU transshipped for the first time.

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.

[redacted] Sea

World shipping connections

- - - - Train Cargo
- - - - Port of Gdańsk
- - - - Port of Gdynia



Source: Port of Gdańsk and Port of Gdynia

2.8 mln TEU

Transshipped via Baltic Hub in 2025

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.

At the beginning of October 2025, the last four of the 20 aRMG automatic cranes were put into operation. Earlier in September 2025, the terminal obtained a permit for the final section of the yard. **This officially closed the project**, which began in September 2022. The investment 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 increases 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 is **one of the largest container terminal complexes in Europe.**

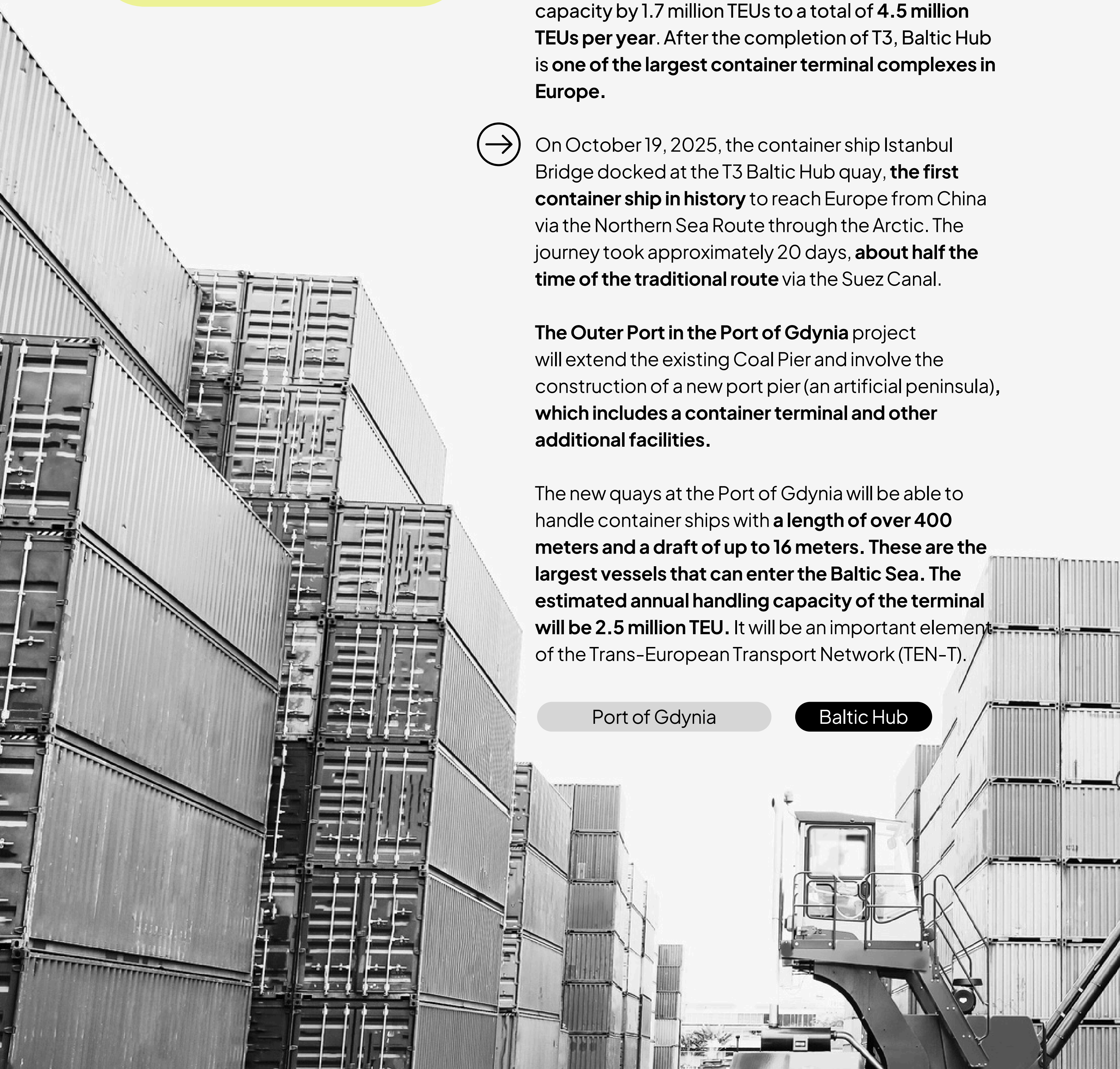
On October 19, 2025, the container ship Istanbul Bridge docked at the T3 Baltic Hub quay, **the first container ship in history** to reach Europe from China via the Northern Sea Route through the Arctic. The journey took approximately 20 days, **about half the time of the traditional route** via the Suez Canal.

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).

Port of Gdynia

Baltic Hub



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).

90 K+
Number of active students during 2024/25 academic year

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

28
Number of Universities in Pomerania

Top 3

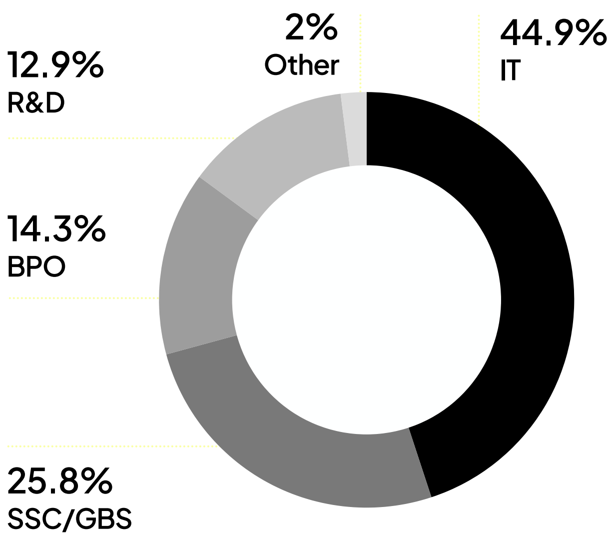
Gdańsk University of Technology rank among technical universities in Poland

Source: Statistics Poland

Business Services Sector

The Business Services Sector

The Business Services Sector is currently the biggest commercial employer in Poland, with Pomerania having 40,900 people in over 219 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).



40,900

Employment in the sector (2025)

219

Number of centres in BSS sector

Source: ABSL Business Services Sector in Poland 2025

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 ~2,200

Nordea >1,700

Sii ~1,300

epam ~1,700

Lufthansa Systems >1,200

IT talent pool in Pomorskie voivodeship

Developers	40,000*
IT Students	11,500
Graduates	2,500/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 (2025)

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. By the end of 2025, offshore wind development on the Polish Baltic coast entered a phase of tangible implementation, with Pomerania emerging as a key operational base for projects in the Baltic Sea. Pomeranian companies are now active across most critical segments of the offshore wind supply chain – from steel structures and tower fabrication to shipyard, logistics and O&M services – and their share is steadily increasing as the first Polish projects move into the construction phase. This growth is driven both by the build-up of new competences among local suppliers and by continued inflow of foreign direct investment locating specialised manufacturing plants and operational facilities in Gdańsk, Gdynia, Łeba and Ustka. In 2025, the Baltic Towers–GRI Renewable Industries tower factory in Gdańsk reached a key stage of implementation, while the installation terminal in the Port of Gdańsk and new O&M bases on the Pomeranian coast are being prepared to serve the first wave of Polish offshore wind farms.

Current wind offshore projects on the Polish coasts by 2040

18 GW

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 up to 12 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.

TOP 10

Global export of yachts
(2025)

1st in Europe's **2nd** in global

construction of motor yachts (up to 12m long)

5th

Export of yachts
(Europe)

25,000

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.

The Pomeranian Region has for many years been an important location for the development of Scania's operations. In Gdańsk, Scania Industrial Batteries manufactures battery packs for electrifying heavy-duty equipment, including mining, construction, agriculture, and logistics machinery. The company also supplies batteries for mobile energy storage systems, supporting the broader transition toward sustainable energy solutions. In addition, Scania is developing a new European knowledge center in Gdańsk, consisting of a broad team of HR professionals across core functions. Gdańsk was selected for its excellent access to highly qualified professionals, strong experience in shared service operations, and a stable economic environment. In Słupsk, Scania has operated a factory for more than 30 years, specializing in bus chassis production, further strengthening the region's industrial base. Together, these investments confirm the strategic importance of the Pomeranian Region in advancing electromobility and sustainable industrial development in Poland and across Europe.

Anna Sobolewska, Marketing & Communications Director

Scania Industrial Batteries

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

APTIV · aq · BIBUS MENOS · CIMC · EATON · enelion · EQUAY · intel · Gardner Aerospace · greenway · Lacroix Electronics · LYTEN · NIPPON SEIKI · SCANIA · TENNECO · ZOELLER TECH

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

ziaja	Biggest Polish cosmetics producer, offering products for face, body and hair care.
polpharma	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.
OCEANIC	Polish company, offering antiallergic cosmetics, products for sensitive skin, dermocosmetics, as well as drugs and medical products.

Innovative medtech

blirt / QIAGEN	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.
etac	Producer of assistive devices and patient-handling equipment. The company has been operating in Pomerania since 2020, with target employment of 250 people.
POLTREG	The company works on innovative diabetes treatment and was created by scientists from the Medical University of Gdańsk.
INVICTA	The clinic carries out research and development projects, being a precursor of new solutions in the field of infertility treatment and diagnostics.

Heavy chemistry

ORLEN	Orlen 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

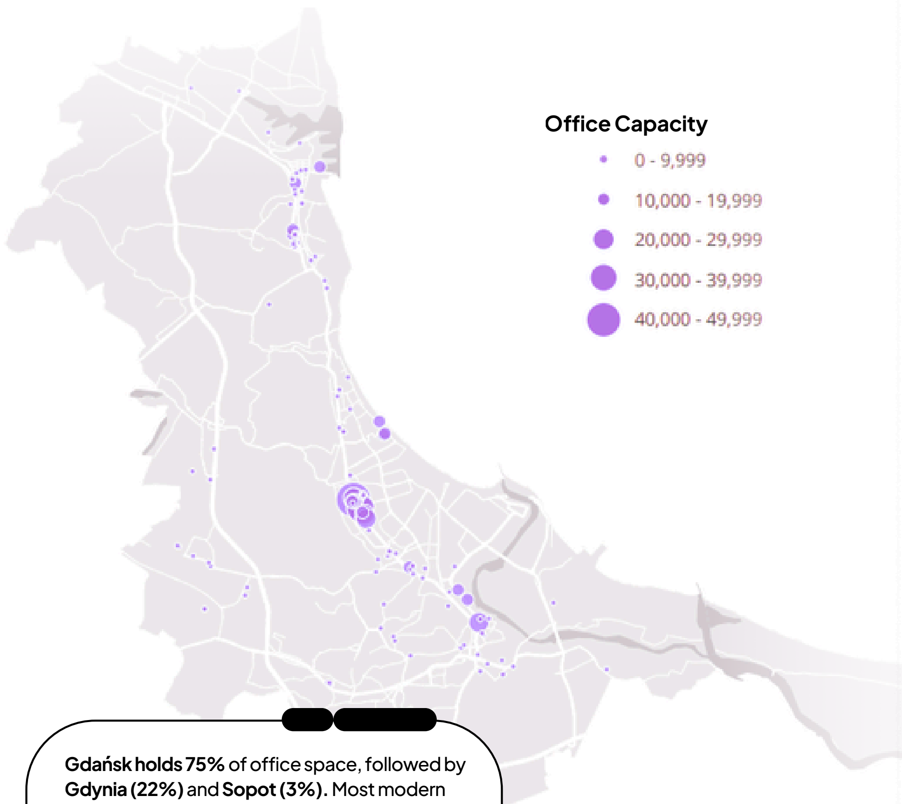
With over 1 million sqm of office space, Tricity ranks as Poland's third-largest regional office market.

The Tricity office market is entering a distinct turning point. After a decade of rapid expansion and substantial growth in modern office stock, the market is now defined by limited developer activity. With only a few projects currently underway, the availability of new office space is steadily diminishing. At the same time, tenant demand remains stable, driven both by new entrants to the market and the continued expansion of companies already operating in the region. This sustained momentum reinforces the Tricity's position as one of Poland's most attractive business locations. We anticipate that in the coming quarters the combination of constrained new supply and stable demand will result in a further decline in the vacancy rate and exert upward pressure on rental levels, particularly in the best-located and modern buildings in Gdańsk. In this environment, for companies aiming to secure space in the most desirable locations, a strategic approach to future office needs and early decision-making will be more important than ever .

Agnieszka Grzywaczewska, Associate Director

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 and Grunwaldzka ave. (Wrzeszcz, Oliwa), with additional projects near Gdańsk airport and the city center.

Selected occupiers

Tenant	Building
Amazon	Olivia Centre: Prime, Point, Tower
Arla Foods	Punkt
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

Since 2022, the market has recorded a gradual decline in new supply, reflecting lower developer activity and a more cautious investment approach. As of December 2025, around 21,700 sqm of office space was under construction in two projects scheduled for completion in 2026–2027: Punkt (12,700 sqm) and Garnizon Nano (9,000 sqm). The limited pipeline indicates moderate supply pressure in the near term. The combination of constrained new supply and sustained demand further tightened the market. The vacancy rate fell to 11.9% at the end of 2025 (down 0.6 p.p. y/y), representing approximately 126,800 sqm of available space. Vacancy levels varied significantly by submarket: Gdynia recorded 23.7%, while Gdańsk stood at 8.6%. The average lease transaction in 2025 reached 1,355 sqm, up 27% compared to 2024, partly driven by several large corporate deals.

1 mln
Total stock in Tricity in 2025 (sqm)

27%
Increase in average lease transaction y/y

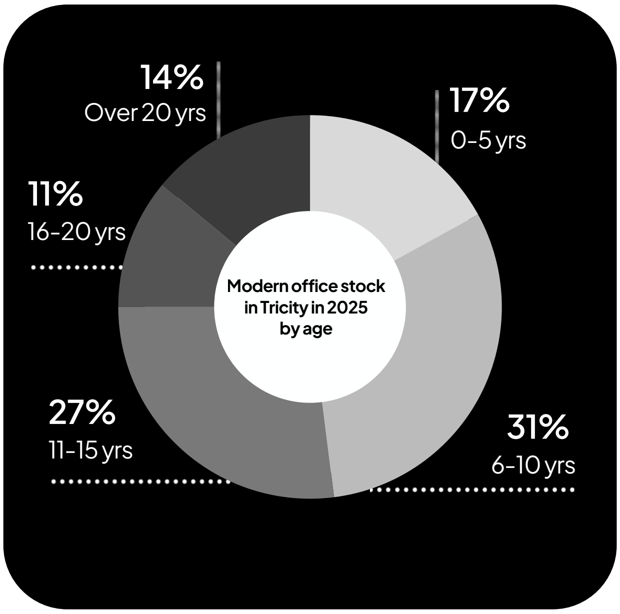
8.6%
Vacancy rate in Gdańsk

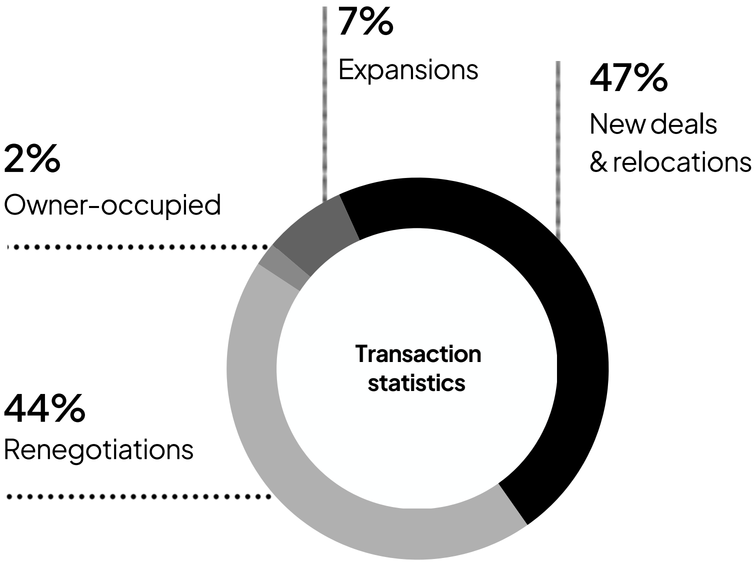
3 rd
The largest regional market for modern office projects

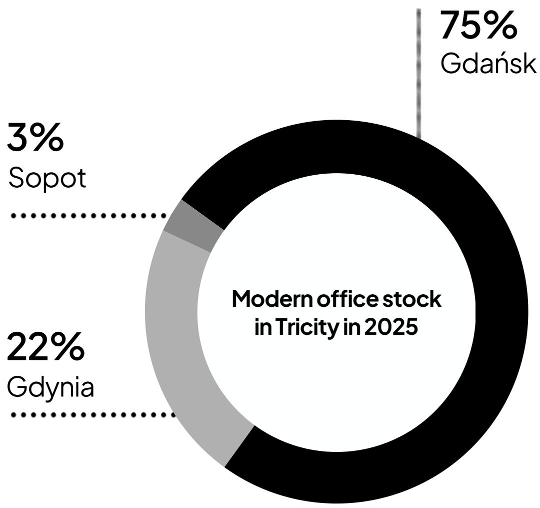
113k+
Total gross take-up (sqm)

€14–16
Rental rates in class A buildings (sqm/mth)

€11.5–13
Rental rates in class B/B+ buildings (sqm/mth)







Warehousing market

The industrial and logistics stock in the Tricity area is distributed across 42 parks, collectively exceeding 1.79 million sqm, ranking it among the most significant regional markets in Poland.
The market continues to strengthen its position on Poland's logistics map, consistently attracting new players. This was evidenced by over 270,000 sqm of new demand realized in Tricity in 2025, the fifth-best result among Polish markets. Combined with approximately 80,000 sqm of lease renewals, this underscores both the scale and sustained attractiveness of the region.

Supported by solid economic fundamentals and expanding road infrastructure, the Tricity market offers strong growth potential, reflected in more than 220,000 sqm currently under construction.
The primary logistics hotspots include Gdańsk-Kowale, Gdańsk Airport, Refinery, and Port, which together account for nearly 74% of existing warehousing space. At the same time, new development locations are emerging, particularly along the new western ring road (S7 expressway). Areas outside the main agglomeration are also gaining traction, with Tczew standing out as a leading example.

Key figures for Tricity

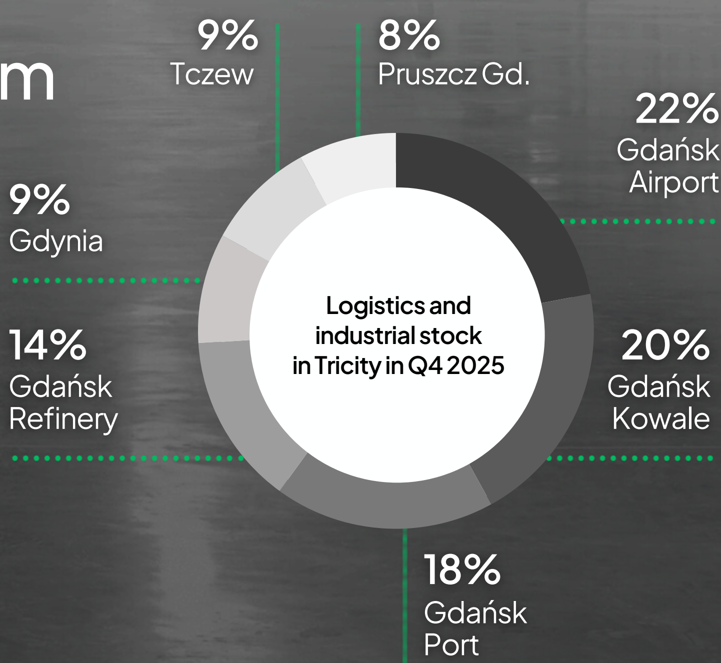
352,700 sqm
Gross demand (Q1-Q4 2025)

1,790,600 sqm
Total stock (Q4 2025)

220,900 sqm
Under construction (Q4 2025)

6.5%
Vacancy rate (Q4 2025)

€4.5 – 5.8
Headline rent (sqm/ mth)

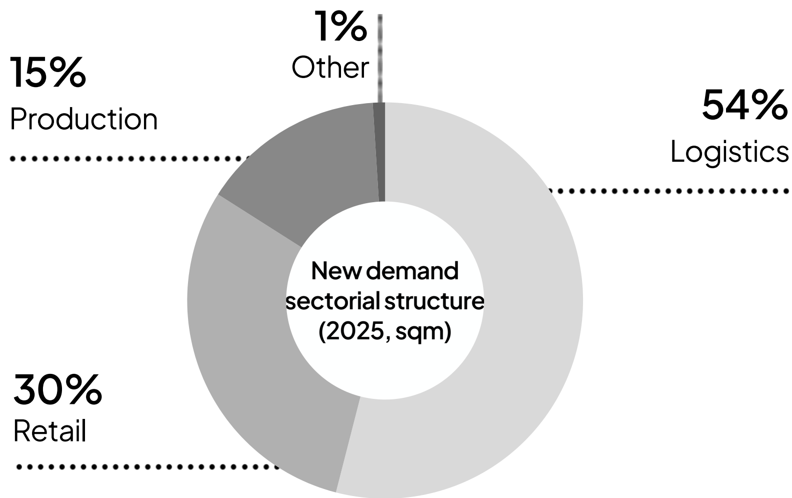


Benefiting from access to the country's most prominent maritime port, Tricity's 2025 demand was dominated by logistics operators and retail chains, together accounting for 84% of total new leasing activity, consistent with long-term trends. The ongoing expansion of Gdańsk's DCT Terminal, coupled with increasing cargo volumes, is strengthening the Tricity region's role as a key logistics hub. This development is expected to fuel the growth of existing operators while attracting new logistics, retail, and manufacturing companies leveraging the port's strategic position.
Following a short-term uptick in the vacancy rate during mid-2025, strong leasing activity in the second half of the year helped stabilize the index at a healthy 6.5%. Notably, most of the current construction pipeline is already pre-leased, which should further support lower vacancy levels going forward.Limited space availability is expected to sustain rental values, with some upward pressure anticipated, particularly for headline rents on prime, modern assets. In Q4 2025, rental rates for suburban logistics parks in the Tricity area ranged from €4.5 to €5.8 per sqm per month.

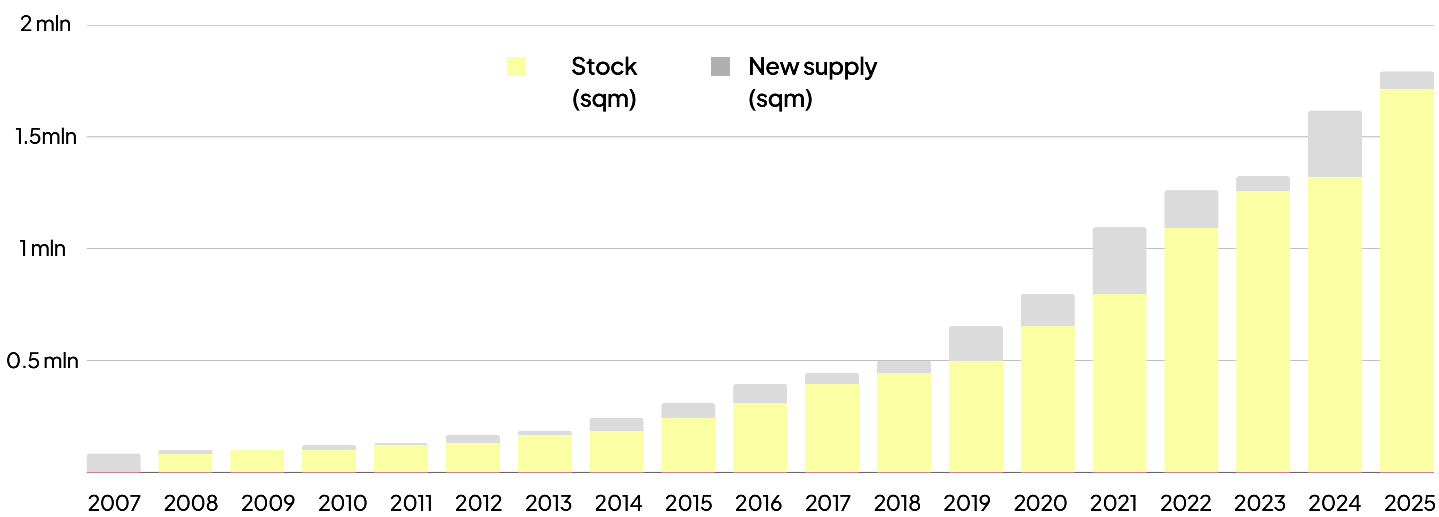
Today, Tricity stands among Poland's best-performing regional industrial hubs. Alongside Szczecin and Kraków, it forms a strong second tier of destinations for logistics and production. The region benefits from an affluent local consumer base, extensive and improving road connectivity, especially in the western part of the agglomeration, and strategic access to the Deepwater Container Terminal (DCT), all of which underpin its ongoing industrial and logistics growth.

Maciej Kotowski, Director,

Research and Consultancy JLL



Stock evolution in Tricity (mln)



Source: JLL

Residential market

The Tricity has become one of Poland's most dynamic residential markets, showing steady growth and resilience over the past 20 years. Completions rose from approx. 4,100 units in 2005 to a peak of over 9,600 in 2021, reflecting the region's sustained economic growth and attractiveness. In 2025, deliveries temporarily declined to 6,600 units due to fewer project starts in 2023. Developers account for 85–95% of annual completions, ensuring high market flexibility and effective supply management. The market is already rebounding, with JLL data and developer announcements indicating around 7,000 units to be completed in 2026, confirming renewed confidence in the region's growth.

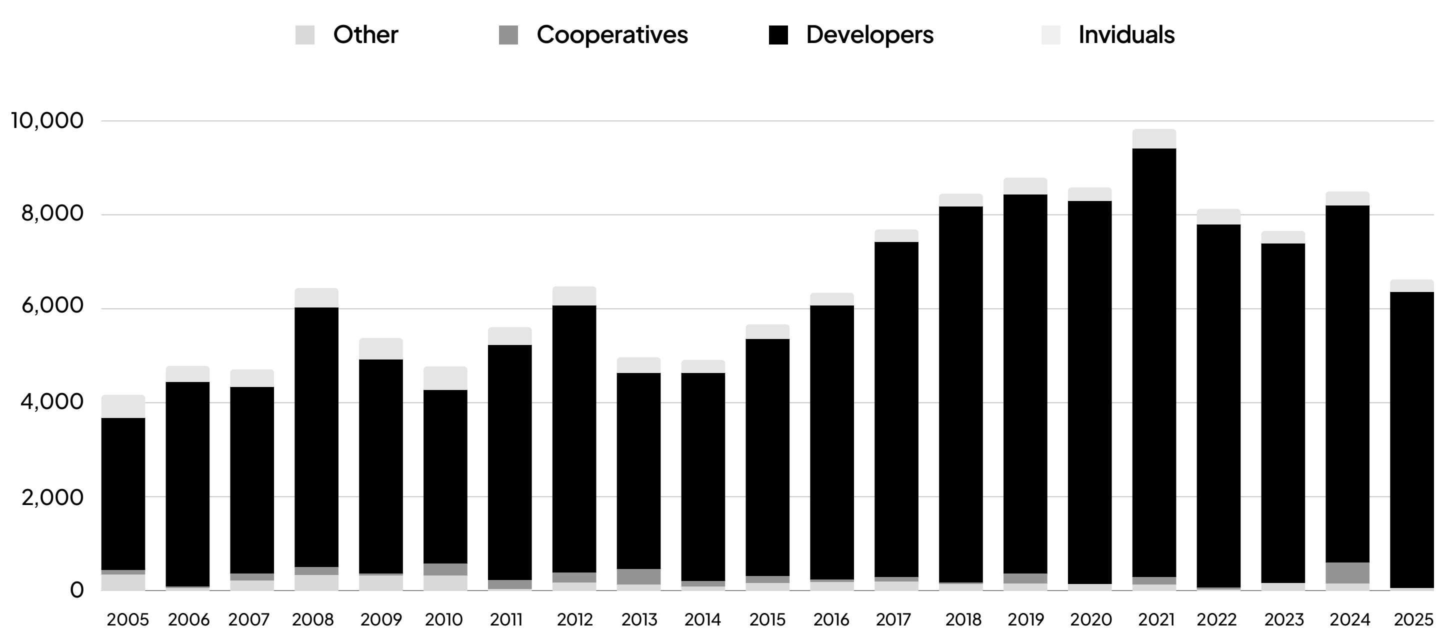
Developers in Poland focus on building flats for sale, but in recent years, the activity in the institutional private rental sector (PRS) has also been growing quite dynamically. Currently, in Tricity, there are approximately 1,800 operating PRS units, nearly 3,100 in 8 projects under construction, and another 500 units in the planning stages.

Number of completed dwellings

4,000
2005

6,600
2025

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 these is Gdansk, where 81% of all new apartments in the metropolitan area were completed over the last 10 years. During the boom, developers delivered approximately 6,000-7,000 apartments annually in Gdansk. By 2025, although this number had fallen to 5,500 units, however, it was still a high level for this housing market.

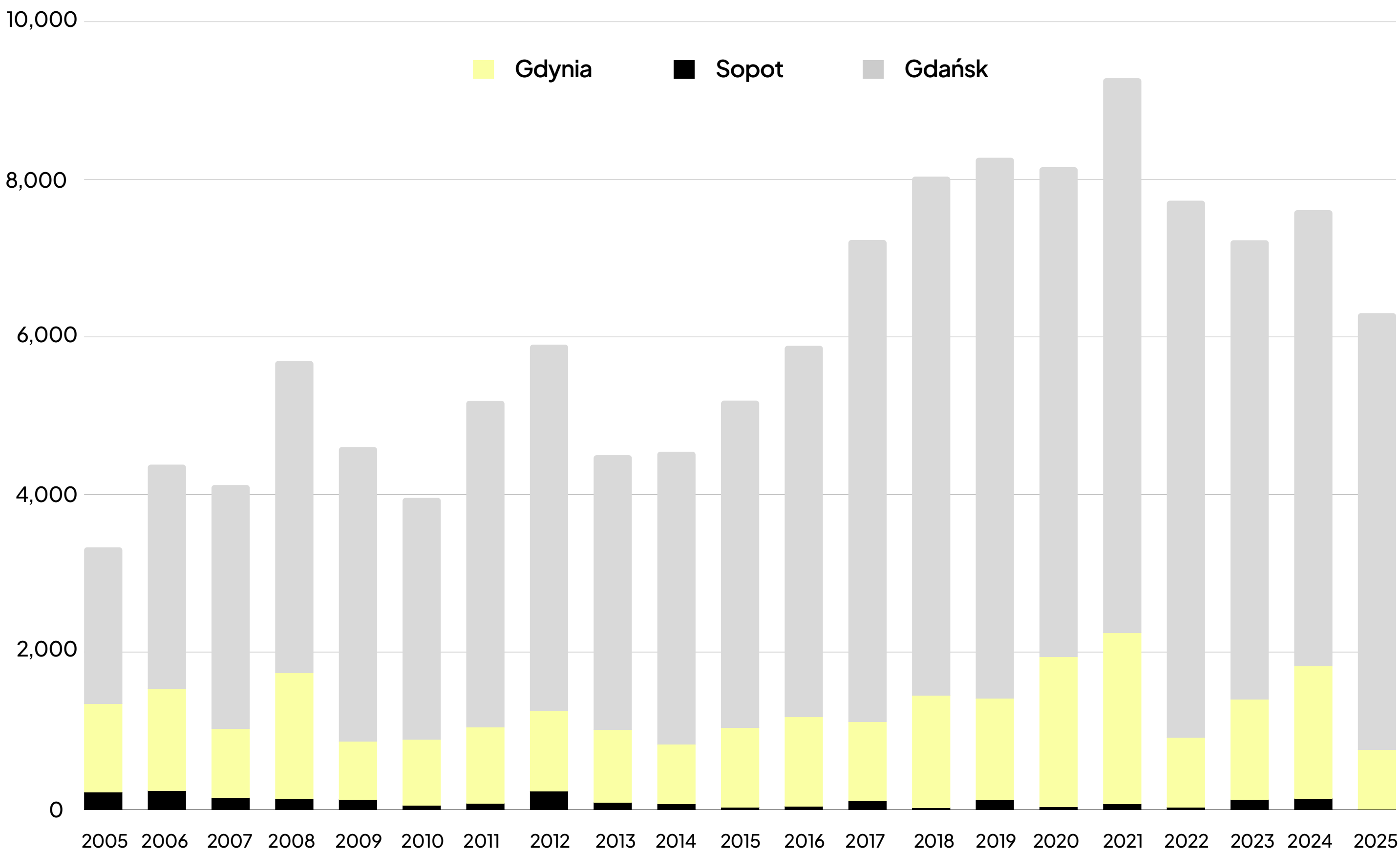
Sopot

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

Gdynia

The annual number of apartments delivered in Gdynia over the last decade has ranged from 750 to over 2,200, typically encompassing all market segments: from popular affordable apartments, through centrally located infill developments, to luxury marina-style residences. In 2025, as in the entire Tricity area, Gdynia recorded a decline in completed apartments, but in 2026 we expect a significant increase to as much as 1,600 units.

Residential Completions by Developers in Gdańsk, Gdynia and Sopot

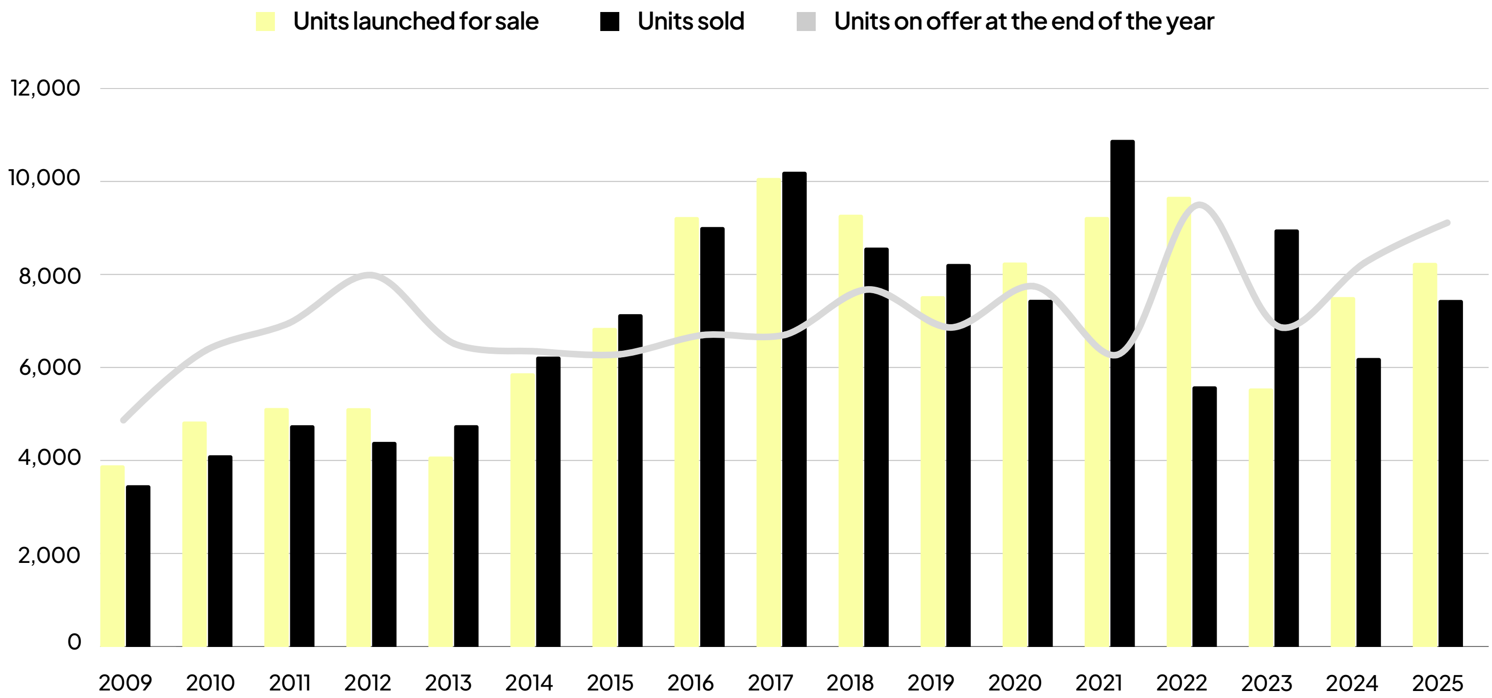


Source: Statistics Poland

The current state of the new residential market

The Tricity market usually competes with Krakow and Wroclaw for second place in the country in terms of the number of units sold annually on the primary market. In the whole of 2025, the sales in Tricity were significantly higher than in Krakow and Wrocław, with the Tricity taking second place (after Warsaw).

In the Tricity, strong tourism makes short-term rentals an important segment. Favorable tourism trends and demand from households upgrading their living standards drove record sales in 2016–2021, peaking at nearly 11,000 units in 2021. After temporary declines in 2022 and 2024 due to the war in Ukraine, interest rate hikes, and weaker purchasing power, the market rebounded in 2025. Alongside Warsaw, the Tricity was the only city to record y/y sales growth, confirming its strong resilience, solid economic fundamentals, population growth, and diversified demand from residents and investors.



Source: Research and Consultancy JLL

Geography of the offer

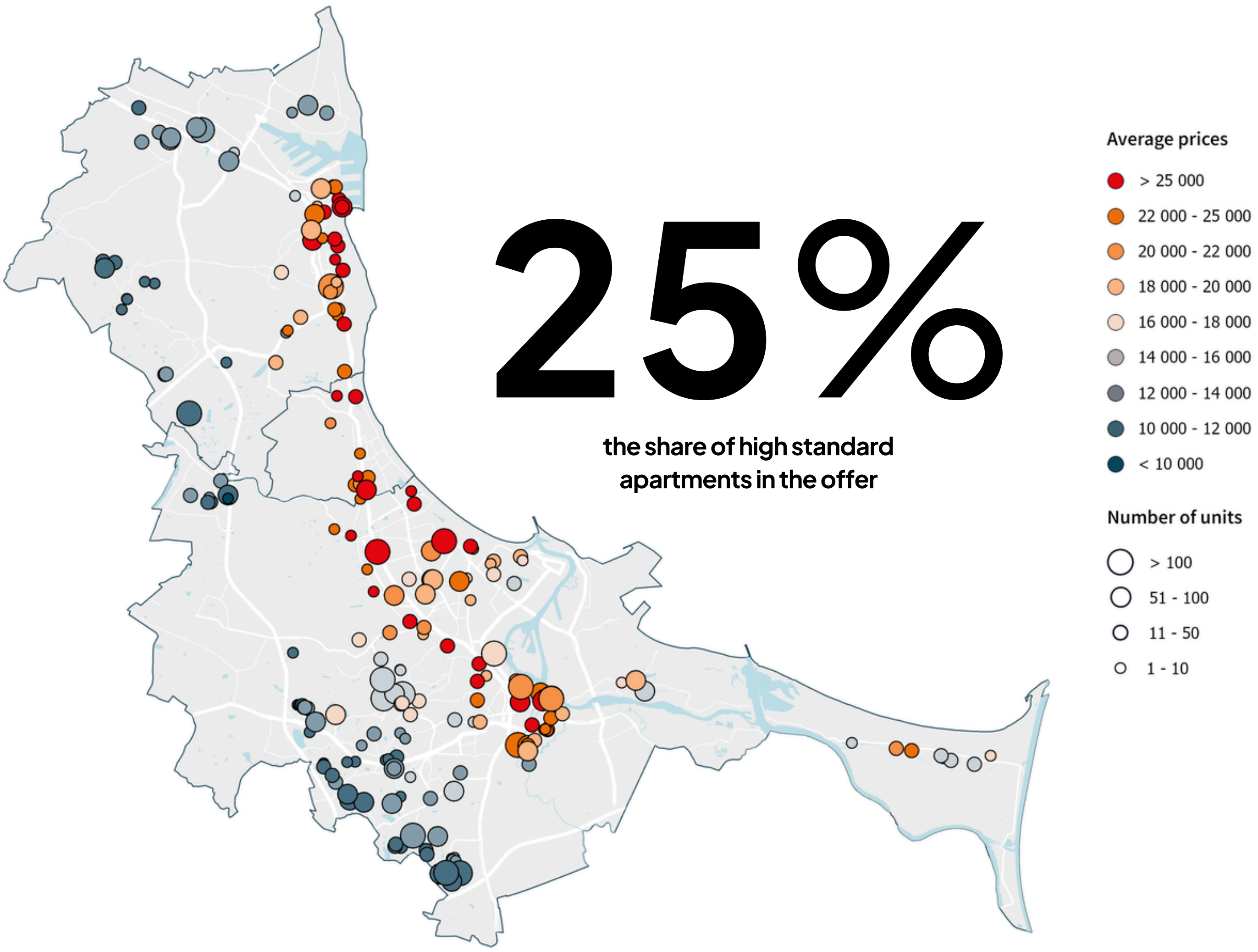
Due to Tricity's tourist attractiveness (combined access to cultural events, monuments, beaches, and business), several areas can be distinguished in the region, mainly the seaside area, city centre projects and projects located in the south of Gdańsk. 25% of the offer are high-standard apartments, located 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 2025, units at low-end standard accounted for 45% of the offer and their average price was up to **12,600 PLN/sqm**.

Residential units

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 2025 it accounted for 25,0% of the offer, i.e. 2,100 best-quality residential units. At the end of 2025, Tricity had the largest number of high-standard apartments in Poland, even ahead of the capital in this respect.

Between 2012 and 2016, the prices of residential units in Poland were quite stable. In the 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 2025, the average gross asking price of a residential unit in the Tricity was 17,800 PLN/sqm (5.8% growth y/y). The Tricity, just behind Warsaw, ranked second in terms of the average price per square meter among the six biggest markets in Poland.



25%

the share of high standard apartments in the offer

Tourism and hotel market

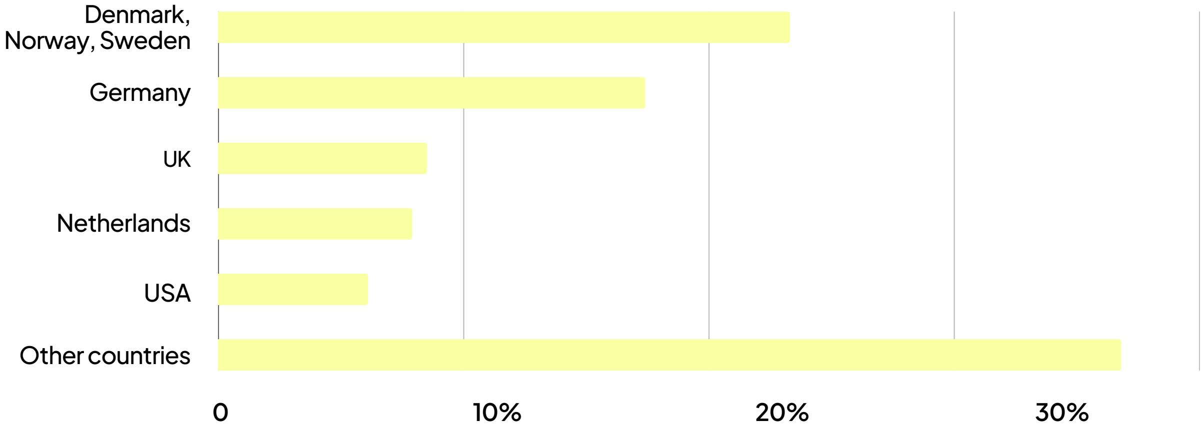
The Pomeranian Voivodeship has long been one of the most popular tourist destinations in Poland. In 2024, 5.9 million tourists used accommodation facilities (according to the Central Statistical Office). Preliminary estimates suggest 6.6 million in 2025, a 13% increase. This figure excludes those staying overnight with family or friends, as well as same-day visitors. Therefore, the actual volume of tourist traffic is even higher.

Among tourists using the accommodation facilities in 2024, residents of Scandinavian countries: Norway, Sweden and Denmark, as well as Germany and Great Britain, dominated – together these groups accounted for half of the entire traffic. Over the last five years, there has been a particularly large increase in the number of tourists arriving from: Belgium (in 2024 there were 4.2 times more of them than in 2019), Netherlands (3.6 times more), Czechia (2.3 times more), Denmark (1.9 times more) and USA (1.9 times more).

This dynamic growth in tourism is linked to the dynamic growth of the accommodation market, including hotels. Currently, the region offers 223 hotels offering 28,700 beds, including 11,900 in 4-star and 5-star hotels. Over the past 10 years, the number of hotel beds has increased by half, and the number of 4-star and 5-star hotels has increased 2.5 times.

4.6 mln	5.1 mln	5.9 mln	6.6 mln
2022	2023	2024	2025

Foreign tourists by country in 2024



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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