
The Development of Self-Storage in Poland: A Logistics Infrastructure Management Perspective with a Focus on Business Customers

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Abstract:

Purpose: The aim of the paper is to determine the current state and future trends of the self-storage market in Poland against the backdrop of international experience, with particular emphasis on the types of facilities, their location trends, the business models of their operators, as well as the types of storage tenants, broken down into individual and business tenants, with particular attention paid to the needs of the latter in the context of these facilities' role as logistics infrastructure.

Design/Methodology/Approach: Methodologically, the paper is qualitative and exploratory-descriptive, relying on methodological triangulation. It draws on a critical review of the relevant literature, as well as an analysis of secondary data from reports by FEDESSA, CBRE and other consultancy firms and estate agents. Furthermore, an analysis was carried out of the database of self-storage operators in Poland, from which more detailed conclusions were drawn regarding the typology of operators and the locational patterns of self-storage facilities in Poland.

Findings: The self-storage market in Poland is in its early stages of development, with a total stock of over 225,000 m² and more than 200 facilities. Local operators with a single facility dominate the self-storage sector (around 110 operators); nearly 30 operators are nationwide chains. Recently, the market's development has been gaining momentum, driven by both quantitative factors and certain qualitative aspects (including the digitalisation of facilities, improvements to their technical standards and the expansion of franchise networks), which are attracting interest from business customers.

Practical Implications: The research findings provide operators, customers and investors with an insight into the current state of the self-storage market and its growth areas; furthermore, they highlight the role of self-storage facilities as part of the logistics infrastructure to decision-makers and other stakeholders.

Originality/Value: The article outlines the main trends in self-storage research and is one of the first to examine the Polish self-storage market in terms of logistics infrastructure, with particular emphasis on its potential for business customers, including those from the e-commerce sector.

Keywords: Self storage, logistics infrastructure management, commercial warehouses, self storage market, business customers, e-commerce.

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1. Introduction

Among the various types of commercial warehouses that have been built in Poland for nearly thirty years now, self-storage facilities represent a distinct novelty. Their development has recently been very dynamic, forming part of the evolution of logistics infrastructure and reflecting its adaptation to trends in logistics and changes in people's needs.

It should be noted that these facilities meet the requirements of two customer groups – individual customers and those from the business sector – which makes them unique solutions.

To get to the heart of these facilities, it is worth referring to the understanding of them as set out by CEN (European Committee for Standardisation) – the definition of self-storage states that it 'is a system of storage in which the service provider allocates, under the terms of a self-storage contract, a finite, securable unit for storage to which the customer has the right to exclusive access' (CEN as cited in FEDESSA and CBRE, 2025)

Furthermore, it is emphasised that a self-storage unit is 'an individual, self contained, securable unit of storage space which, once occupied, is static within a self storage facility' (CEN as cited in FEDESSA and CBRE, 2025).

The Polish self-storage market is still in its early stages of development, given that the total existing storage space amounts to over 225,000 m², which is very small compared to other European markets, such as the United Kingdom, with over 6,000,000 m² (FEDESSA and CBRE, 2025) or the United States, where the use of such facilities is very widespread. In Poland, this process is beginning to gain momentum, making it a valuable and interesting area of research.

Information on self-storage facilities appears in industry reports, particularly those relating to the property market. An analysis of the relevant literature, particularly within the fields of management and quality science, reveals a gap in academic publications concerning self-storage facilities, their treatment as part of the broader logistics infrastructure, and the management of their development by the self-storage operators.

Furthermore, it is also difficult to find studies on the current state, trends and

conditions governing the development of the self-storage market in Poland, particularly when viewed against the backdrop of European and global experiences and publications.

This study aims to fill this knowledge gap. The goal of the paper is to determine the current state and future trends of the self-storage market in Poland compared to international experience, with particular emphasis on the types of facilities, their location trends, the business models of their operators, as well as the types of storage tenants, broken down into individual and business tenants, with particular attention paid to the needs of the latter in the context of these facilities' role as logistics infrastructure.

The paper also sets out practical implications for, amongst others, entities operating in the TFL market, self-storage operators, other companies in the warehousing market, decision-makers and potential investors – which is particularly relevant now that this market is entering a phase of rapid growth in Poland.

Methodologically, the paper is qualitative and exploratory-descriptive, relying on methodological triangulation. It draws on a critical review of the relevant literature, as well as an analysis of secondary data from reports by FEDESSA, CBRE and other consultancy firms and estate agents.

Furthermore, an analysis was carried out of the database of self-storage operators in Poland, from which more detailed conclusions were drawn regarding the typology of operators and the locational patterns of self-storage facilities in Poland.

2. Literature Review

A review of academic publications relating to the topic of self-storage reveals several main strands of research. One significant strand concerns the issue of 'designing self-storage' and, it is important to note, does not address strictly technical matters but is linked to economic considerations.

Gong *et al.* highlight that, when designing self-service warehouses, the challenge lies in adapting them to the needs of different customer groups, and they emphasise the importance of maximising revenue. Consequently, they devote considerable attention to the issue of redesigning existing warehouses as these facilities are used over time (Gong *et al.*, 2013). It is therefore an important issue in the long-term management of such facilities

In this regard, Zhou, Gong and de Koster, whilst also taking into account the specificity of this type of warehouse (the fact that they are flexible in terms of layout and the ability to change it) and their diverse customer base, consider how to design facilities to maximise revenue within a limited time horizon. They utilise a customer choice model (Zhou, Gong, and de Koster, 2016).

Furthermore, Zhang *et al.* also with a view to maximising revenue, model warehouse operations and propose an approach aimed at finding the optimal schedule (Zhang *et al.*, 2016).

These issues are linked to the topic discussed by Chen, Li, and Wang (2019) concerning dynamic pricing in self-storage facilities. The authors refer to the method of a ‘price controller’ – adopted from control theory – and attribute effectiveness and simplicity to this approach.

The topic of pricing in the self-storage sector is also regularly addressed in annual reports on this market, not only in terms of price levels, but more recently also, for example, in relation to the use of AI for pricing models (FEDESSA and CBRE, 2025).

Individual customers are encouraged to use self-storage facilities, on the one hand, by the situation in the real estate market and high property prices, and on the other, by changes in lifestyle – such as professional mobility or the desire to pursue sporting passions and store equipment for various activities (Self Storage Polska, 2025).

This perspective also touches on an important social dimension, namely when such warehouses are used, for example, during house moves, and these facilities become a home for belongings whilst a new home has not yet been established (Owen, 2022).

Blosnich *et al.* note that as many as one in four users (among American adults) use self-storage to store their belongings due to difficult life situations and disruptions (e.g. divorce, financial problems, eviction) that give rise to emotional problems and extreme stress (Blosnich *et al.*, 2026).

In this regard, the authors point out that these are places where public health initiatives can be carried out, potentially reaching these individuals with offers of support or health promotion activities (Blosnich *et al.*, 2026). This is an important, often overlooked factor in the demand for self-storage facilities from individual customers, which may also be worth observing in other countries.

Self-storage facilities form part of the wider logistics infrastructure which, given the trend towards locating them on the outskirts or even within city limits, also falls within the scope of spatial planning and urban and architectural issues.

Aiello notes that they constitute an architectural category worthy of study, as they influence cities – particularly the sprawl of the suburbs and the creation of urban/suburban enclaves – whilst, from an economic perspective, they are a by-product of consumerism and the culture of accumulation (Aiello, 2016).

The distinctive nature of self-storage facilities is evident in the fact that they attract not only private customers but also those from the business sector. The issue of the share of both groups of customers in the space offered by these facilities is also discussed in numerous publications. Regularly updated data is published in reports (including CBRE and FEDESSA, 2024), which show that this share varies considerably across individual local markets (Table 1). This is discussed in more detail in section 3.

The publications emphasise the interest in self-storage facilities shown by businesses from various sectors, who use them to archive documents and promotional materials, whilst smaller construction firms use them to store tools (Self Storage Polska, 2025), and finally representatives of the e-commerce sector – smaller online retailers (Gryko as cited in: Czy self ..., 2025).

In this context, it is also worth referring to the research by Daniel and Ellis-Chadwick, which, within the framework of the liminal approach, highlights the experiences of entrepreneurs who view the period during which they operate using self-storage warehouses as a kind of transitional phase (Daniel and Ellis-Chadwick, 2016).

The authors also draw attention to the benefits arising from additional services provided by self-storage operators, which may increase their occupancy rates (Daniel and Ellis-Chadwick, 2016). This is important to note when considering the role of self-storage operators in managing the development of logistics infrastructure.

As elements of logistics infrastructure, self-storage facilities are characterised by a variety of designs and additional features relating to their fittings and location. In countries with a longer history of their development, studies identify three generations of these facilities.

The first (1965–1988), comprising simple metal buildings, usually without air conditioning or security systems, with rows of storage units resembling garages, most often located in industrial estates; the second (1989–1993) comprising similar structures but with temperature control, better security measures and situated near urban areas (Janover, 2022).

The third generation (1993 to the present) comprises properties with more advanced technical features, including temperature and humidity control, similar to office buildings with better accessibility and which also offer aforementioned business services (Janover, 2022)

In the light of improvements to storage conditions in various types of warehouses and the evolution of such facilities, attention should be drawn to another line of research evident in the literature on the subject, namely that concerning their

digitisation, automation and the concepts of ‘smart’ (Tiwari, 2023) and ‘intelligent’ warehouses (Tubis and Rohman, 2023).

Studies on various types of warehouses highlight the impact of e-commerce and omni-channel retailing on the evolution of these facilities into strategically important logistics centres equipped with the latest technologies (Boysen and de Koster, 2025; Boysen, de Koster, and Weidinger, 2019).

It should be noted that the practical measures taken by operators in the self-storage sector are leading to the digitalisation of facilities. Self-storage is currently moving towards fully digital storage units, which are fitted with electronic locks, have dedicated apps and, in many cases, allow the rental process to be completed entirely online. These digital solutions apply to both newly built facilities and those undergoing modernisation (Poskrobko, 2025).

3. Research Results

3.1 Self-Storage Facilities and their Growth in Europe

The European self-storage market is estimated to comprise 10,571 facilities with a total of 17.7 million m² of storage space. The market remains highly concentrated: the four leading countries — the United Kingdom, France, Spain and Germany — account for 68% of facilities and 75% of total space. (FEDESSA and CBRE, 2025) Table 1 illustrates the situation regarding self-storage facilities in Europe.

Table 1. Basic information on self-storage facilities in selected European countries (in 2025)

Country	Sq m total floor space	The existence of a national self-storage association	% Average store occupancy	Average annual net rental rates € per sq m	Commercial vs. Residential split(% sq m occupied)*
Austria	346,000	x	73,7	326	25%/75%
Belgium	260,000	x	88,4	235	38%/62%
Denmark	340,000	x	89,3	316	26%/74%
Finland	220,000	x	74,9	286	20%/80%
France	2,690,000	x	80,2	294	31%/69%
Germany	2,394,734	x	75,0	292	31%/69%
Ireland	210,000	x	80,5	321	44%/56%
Italy	190,000	x	81,4	265	48%/52%
Netherlands	1,240,000	x	85,3	243	43%/57%
Norway	365,000	x	73,3	269	20%/80%
Poland	225,000	-	78,1	182	48%/52%
Portugal	140,000	x	72,7	207	32%/68%
Romania	60,000	-	78,3	136	50%/50%
Spain	2,000,000	x	77,3	304	33%/67%

Sweden	530,000	x	87,4	217	33%/67%
Switzerland	200,000	x	75,6	510	27%/73%
UK	6,093,139	x	75,1	375	34%/66%

Note: * The figures in this column of the table are for 2024

Source: Elaborated based on (FEDESSA and CBRE 2025; CBRE and FEDESSA 2024)

Individual European self-storage markets (Table 1) differ not only in terms of the size of their stock, but also, for example, in the occupancy rate of existing space. Across different countries, this ranges from a low of around 73%, as in Portugal or Norway, to nearly 90% in Denmark or Belgium.

Differences in this regard stem from a number of factors, such as the level of rental rates in individual markets, or the proportion of business and private tenants within the tenant mix. In some countries, this breakdown is fairly balanced – for example, in Romania and Poland; there are also countries with varying proportions, such as 20 per cent to 80 per cent, as seen in Norway or Finland (FEDESSA and CBRE, 2025; CBRE and FEDESSA, 2024).

Interest in self-storage facilities amongst business customers (small and medium-sized enterprises) increased during the pandemic, partly due to the boom in the e-commerce sector, and remained steady for several years thereafter (CBRE and FEDESSA, 2024). However, 2025 saw a reversal of this trend, with commercial use of self-storage facilities in Europe falling by around 4% (FEDESSA and CBRE, 2025).

When examining the similarities and differences across individual countries, it is worth noting that in those with the most mature self-storage markets, there are organisations that bring together self-storage operators and are also members of the Federation of European Self Storage Associations (FEDESSA) (Table 1). Through its network, this organisation represents nearly 4,000 self-storage facilities, including the market's leading operators (FEDESSA, 2026).

Operators affiliated with FEDESSA adhere to the European Self-Storage Standard, which sets out requirements regarding security, access control, the technical quality of facilities and regulatory compliance, as well as operational practices — tenant identity verification, CCTV and alarm systems, and insurance — which protect both the operator and the customer (FEDESSA, 2026).

3.2 Self-Storage Facilities in Poland – Current Situation

The total floor area of self-storage facilities in Poland at the end of 2025 is approximately 225,000 square metres (FEDESSA and CBRE, 2025). Currently, the number of facilities has already exceeded 200, although as recently as 2020 it stood at around 90 (Self Storage Polska, 2025; Okoń, 2025). As a result of developments over recent years, the number of facilities has increased, and qualitative changes are

also being observed in the market.

In order to provide a more detailed profile of the self-storage market in Poland and its operators, an analysis was carried out of the database of facilities available on the industry portal Self Storage Polska, which has been in operation since 2025. It currently comprises 223 entries. To supplement the methodological assumptions, it should be emphasised that this catalogue is largely based on submissions from operators and is compiled by market practitioners and content marketing specialists (Self Storage Polska, 2026).

This database covers a large number of self-storage facilities and, given the lack of official, publicly available statistics on this subject, it is a valuable source for identifying certain patterns and drawing conclusions that clarify and complement the information on the Polish market provided in the annual reports by FEDESSA and CBRE.

It should be added that the database entries also include entities supplying various types of technology and equipment for self-storage. This fact is taken into account in the subsequent analysis; the figures quoted are approximate, and the focus is on self-storage operators and their facilities.

An analysis of the data (Self Storage Polska, 2026) identified nearly 130 entities (including several technology providers), the majority of which are self-storage operators with a combined total of over 200 self-storage facilities (locations). Among them, those with a single facility in one location are by far the most numerous – around 110 operators – and can therefore be described as ‘local, single-facility operators’.

Nearly 30 operators currently have facilities in two or more locations; some of them even have facilities in ten or more locations, so they can be described as ‘multi-facility’ or ‘network operators with a national reach’ (given that their warehouses are located exclusively within Poland). Only a few operators operate on the international market or have links to it (mainly through capital ties).

It can be argued that this market structure is fairly typical of the early stages of its development. In the future, integration processes and interest in the Polish market from larger foreign operators are to be expected.

Reports on the warehouse market in Poland are already mentioning the first investment transactions involving self-storage facilities. In 2023, one such facility in Warsaw was acquired for approximately 11 million euros (Colliers, 2024).

An analysis of the database of facilities (Self Storage Polska, 2026) also enables the identification of certain patterns regarding the location and specific geographical distribution of self-storage facilities in Poland. The highest concentration of facilities

can be found in the country's major urban areas, such as Poznań, Łódź, Szczecin, the Tri-City, the Silesian conurbation (Katowice, Bytom, etc.), Wrocław, Warsaw and Kraków. Within these largest centres, either in the boundaries of a single city (or in its immediate vicinity), there are facilities operated by several operators, or these chain operators have several locations each.

Self-storage facilities are also being built in smaller towns (satellite towns) near such large cities (e.g. Pruszcz Gdański near the Tri-City) and, finally, in medium-sized Polish cities such as Częstochowa and Toruń, as well as in small towns (Stargard) (Self Storage Polska, 2026).

This spatial development of the market can be regarded as similar to that seen in the case of other types of commercial warehouse facilities. In their case, the siting of facilities was initially concentrated in major urban centres (located closer to the centre of the country) and then 'spread' towards other (including those on the periphery) smaller urban centres (partly due to e-commerce warehouses requiring proximity to end customers).

4. Discussion and Conclusion

The analysis of the current state and future trends of the self-storage market in Poland presented in this paper suggests that this market is in its early stages of development, with a total capacity of over 225,000 m² and more than 200 facilities (FEDESSA and CBRE, 2025; Okoń, 2025). Recently, however, this process has been gaining momentum, taking into account both quantitative aspects and certain qualitative issues – such as the introduction of standards and market solutions.

With regard to the types of self-storage facilities in Poland, it should be noted that there are two main types of units: outdoor units – i.e. those operating as free-standing storage units, intended for the storage of items with limited sensitivity to moisture – and indoor units, usually located in an enclosed, heated and monitored building, which are more suitable for storing items sensitive to temperature and moisture (e.g. documents, electronics or clothing) (Self Storage Polska, 2025).

In terms of organisational structure and business models, there are nearly 130 operators, of which around 110 are entities with a single facility in one location (they can therefore be described as local single-facility operators), whilst nearly 30 have such warehouses in between two and a dozen or so locations (these can be termed nationwide network operators). Their facilities are located both in the country's major urban centres, their satellite towns, and in smaller, more remote locations (Self Storage Polska, 2026).

Although self-storage facilities are already being established in towns and cities of various sizes across Poland, it is still difficult to speak of clusters of such facilities in

individual urban areas, as is the case, for example, in the US market or in some European markets.

However, the nuisances and negative externalities associated with their operation are already being felt locally, such as vehicle traffic (24 hours a day) and the associated noise, light pollution, etc.

In Poland, there are already examples of environmentally friendly solutions being introduced by self-storage operators, which are in line with the philosophy of so-called 'green buildings' and aim to reduce such nuisances, as well as the first initiatives relating to multi-criteria certification. For example, one of the facilities built in Kraków has been awarded BREEAM certification covering the design and construction phases (Heller, Czech, and Kuczera, 2026).

It is reasonable to assume that, following the example of other segments of the warehouse market in Poland – where certification has become the norm, including for these types of facilities – this process will gather pace.

Management of the development of self-storage warehouses, which represents a new class of facility on the Polish logistics infrastructure market, is a significant challenge and must take into account a range of factors and the coincidence of social processes, as well as those resulting from changes in spatial planning and modern logistics.

This phenomenon stems from a change in the lifestyle of many people (Makowska, 2025) who are keen to take up sporting activities and various hobbies; whilst developers are simultaneously reducing the availability of cellars in new buildings, these individuals are seeking places to store various items of equipment, and in this respect, self-storage facilities are gaining in importance.

At the same time, the current growth of e-commerce and the emphasis on flexibility and rapid product availability for end customers are forcing retailers to locate their new warehouses closer to consumers. This, in turn, is creating demand for small warehouse spaces (for rent) in convenient locations with good access, such as those provided by self-storage facilities (Okoń, 2025).

Bearing in mind the two main customer groups mentioned above, it should be noted that a distinguishing factor in the development of self-storage facilities in Poland is the high, compared to other European countries (Table 1), the ratio of space utilised by commercial tenants to that by individual tenants, which in 2024 stood at 48% to 52% respectively (CBRE and FEDESSA 2024). Furthermore, in 2025, the occupancy rate of warehouses by business customers increased further – to over fifty per cent (FEDESSA and CBRE, 2025).

Self-storage customers from the business sector are also showing an interest in additional office space (e.g. on mezzanine floors) in facilities with good access and a drive-up to the storage unit that allows for the loading and unloading of small consignments or equipment, as well as additional services (e.g., insurance) and a flexible contract that takes into account seasonal fluctuations in sales (Self Storage Polska, 2025).

Over time, new suppliers of cutting-edge technologies – covering both hardware and IT solutions for the self-storage sector – are emerging on the Polish market (Self Storage Polska, 2026).

The rapid growth of the Polish self-storage market is taking place at a time when there is a strong focus on digital solutions, and a whole ecosystem of digital services and tools for the sector is being developed. Digital platforms are emerging for searching for storage units, making bookings, and paying for storage or insurance services online (InStorage Group, 2025). Thanks to these solutions, facilities are becoming attractive to both individual and business customers.

The development of franchise networks of self-storage operators in Poland, which offer comprehensive business models (InStorage Group, 2025), is also currently contributing to the dissemination of the latest technologies and market standards, thereby promoting the standardisation of solutions.

These create a unique networking effect, meaning, for example, that business tenants can rent space of the same standard in various locations across the country – which is particularly important for smaller e-commerce retailers. The spread of franchise models could contribute to a shift in the prevailing business models of self-storage operators and in the market's structural composition.

When considering solutions that contribute to promoting the development of self-storage facilities, high service standards amongst their operators, and the trust of both individual and business customers, it should be noted that Poland does not yet have an institutionalised association of the sector, modelled on those already existing in over a dozen European countries that are members of FEDESSA (FEDESSA 2026). This can be regarded as a further indication that the Polish market is still in its early stages of development.

As mentioned, among the business clients of self-storage facilities in Poland are organisations seeking space for archived documents, smaller renovation and construction firms storing their equipment there, and e-commerce businesses. However, a review of the literature revealed, amongst other things, that these facilities are often treated as temporary storage locations.

It should therefore be noted that, in this context, self-storage facilities tend to play a complementary role to other types of commercial warehousing (which currently

total over 37 million m² of warehouse space in Poland) and form a supplementary element of urban and non-urban logistics infrastructure (including the ‘last mile’) for e-commerce.

A number of factors will determine the future direction and extent of their use. This issue undoubtedly requires in-depth research, particularly primary research, and going beyond an analysis based on secondary data.

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