Chinese ecommerce and trade in European logistics

November 2026

How Chinese demand is reshaping Europe's logistics landscape, and what it means for occupier markets.

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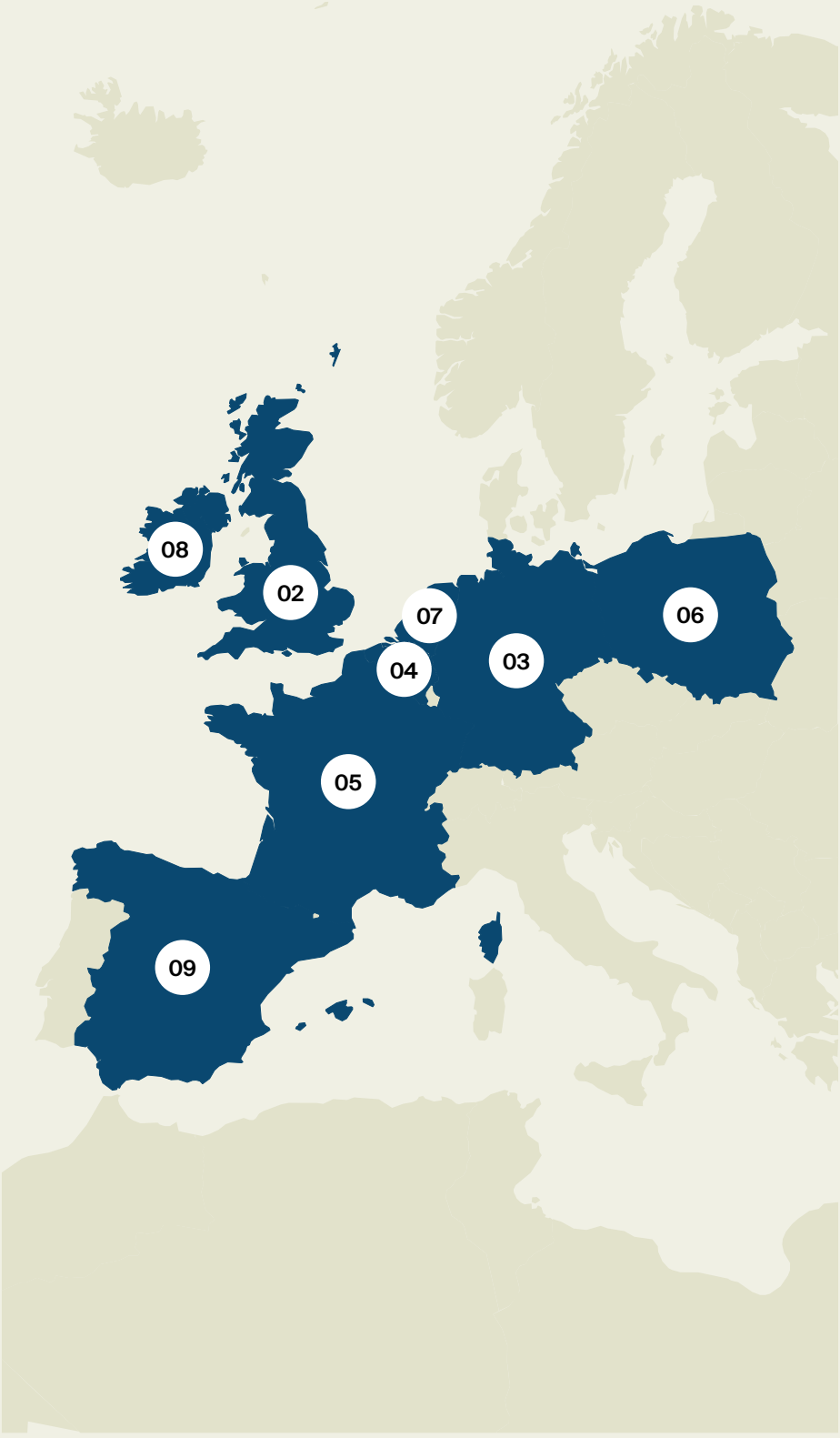
MARKETS COVERED



Chinese ecommerce and trade is putting down roots in European logistics

Chinese occupier demand is broadening across Europe, with ecommerce, inventory, fulfilment and automotive creating distinct logistics requirements.

Key takeaways

1. Chinese ecommerce operators are shifting from direct parcel shipping to local inventory, fulfilment and returns networks in Europe. Chinese car brands are opening a second route into the market.

2. Customs reform is the trigger for Chinese ecommerce. Since July 2026, there is a €3 duty on parcels valued under €150, and a €2 handling fee from November.

3. Leasing is large and moving fast: around 1m sq m in Poland in Q1–Q3 2026, 4.0m sq ft in the UK across 2025 and H1 2026, and c.100,000 sq m in the Netherlands since the start of 2025.

4. Markets are at different stages, and regulation could change the picture again.

CUSTOMS REFORM CHANGED THE ECONOMICS

Small parcels entering the EU from China historically paid no duty below a value threshold. The EU had originally planned to remove the exemption in 2028 but brought the change forward to 2026 as the volume of low-value ecommerce imports continued to rise. Since July 2026, parcels valued below €150 have carried a €3 customs duty, and a €2 handling fee follows from November.

Direct shipping from China is now more expensive. Platforms are responding with bulk imports and local stockholding, which needs warehouse space in Europe. SHEIN, for which Europe is its largest regional market, is the clearest example (see page 4).

WHAT THEY ARE TAKING: BIG, MODERN AND WELL CONNECTED

Occupiers are targeting large, modern units with 20,000 sq m or more in Germany, and 200,000 sq ft to 1m sq ft in the UK. These units have strong power provision, high eaves, extensive yard space and automation capability.

Location is about access. Sites combine port or airport links with motorway connectivity and reach into large consumer markets, from Greater Rotterdam, Schiphol and Liège Airport to the German border corridor, the Brussels-Antwerp axis, North Rhine-Westphalia and the UK Midlands. In Poland, Lower Silesia captured the first wave as a base for Germany and the wider CEE region.

ECOMMERCE IS NOT THE ONLY ROUTE

In Spain, Chinese car brands took around 10% of new car purchases in 2025, up from 1.2% in 2022. Spain's ports and logistics networks make it a potential gateway, with demand for port-side vehicle storage, spare parts and after-sales space still to materialise.

DIFFERENT STAGES, DIFFERENT VIEWS

There is no single picture of Chinese demand across Europe. The Netherlands and Germany already regard it as structural, and the UK is moving that way, while Poland does not yet see it as a lasting source of demand. Spain is developing differently, led by the growth of Chinese car brands, which now account for around 10% of new car purchases. Here, the logistics opportunity is more likely to come from port-side and after-sales space than ecommerce fulfilment.

FROM THE NEWS

Sources: Bloomberg News, European Central Bank

SHEIN commits €500m to its European operations

BLOOMBERG NEWS | NOVEMBER 2026

SHEIN plans to invest €500m in its logistics operation near Wrocław, increasing warehouse capacity, introducing autonomous picking robots and taking the site's workforce to around 10,000 by the end of 2026. The move comes as new EU charges on low-value imports increase the cost of direct parcel shipping and encourage the localisation of inventory and fulfilment within Europe.

€500m

Investment centred on the logistics hub near Wrocław, Poland

10,000

Site workforce targeted by the end of 2026

–53%

SHEIN's first-half operating income in 2026 is down year-on-year

Low prices keep Chinese platforms embedded in euro area shopping habits

EUROPEAN CENTRAL BANK | 13 JULY 2026

More than half of respondents to the ECB's April 2026 Consumer Expectations Survey had used Chinese ecommerce platforms. Low prices and product choice were the strongest draws, while almost two-thirds of purchases were worth no more than €25. Quality, trust and environmental concerns deterred non-users, but geopolitical tensions had only a limited influence on purchasing decisions.

4.17bn

Low-value items (€150 or under) shipped from China into the EU in 2024

70%+

Share of consumers in Greece, Portugal and Spain who say they have shopped on Chinese platforms.

Chinese ecommerce becomes a major driver of UK logistics demand

Platforms are localising inventory and building domestic fulfilment networks, and the Midlands are the main beneficiary.

AUTHOR: CLAIRE WILLIAMS, PARTNER, HEAD OF UK AND EUROPEAN INDUSTRIAL RESEARCH

4.0m sq ft
Taken in 2025 and H1 2026, units above 50,000 sq ft

7%
Share of total UK take-up in the past 18 months

9.6 years
Average lease term, against 10.9 years across the wider market

WHERE THE SPACE IS

Demand is concentrated in the Midlands, which took 74% of the total on the strength of motorway connectivity, labour availability and a supply of large, modern warehouses. London and the South East took a further 19%.

WHAT THEY WANT

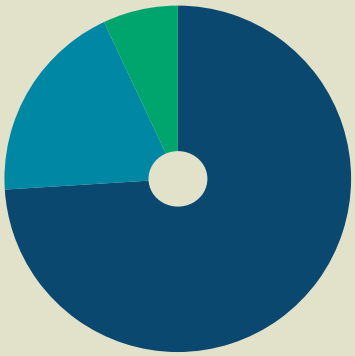
Most requirements are for Grade A buildings of 200,000 sq ft to 1m sq ft, with strong power, high eaves, extensive yards and capacity for automation. Speed matters, so occupiers often prefer buildings that are available now to build-to-suit. Leasing preferences also differ from UK norms: Chinese occupiers generally want shorter commitments, more flexibility and more landlord support with fit-out and building management.

BEYOND THE BIG SHEDS

Expansion is moving beyond national distribution centres. JD.com has built a same-day delivery network serving more than 17m consumers across six cities, and its logistics arm has established facilities in Leeds and Manchester. Investment is following with Shanghai-based Mit-Log acquiring a 540,000 sq ft development at Dove Valley Park in Foston and plans to deliver more than 3m sq ft of UK warehouse space over three years.

Three-quarters of Chinese ecommerce take-up is in the Midlands

Share of take-up by Chinese ecommerce operators by region, 2025 and H1 2026, %



East and West Midlands	74%
London and South East	19%
North West	7%

Source: Knight Frank Insight

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Chinese ecommerce becomes a major driver of UK logistics demand

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Germany’s logistics market is seeing a new wave of Asian demand

Asian, and especially Chinese, ecommerce and fulfilment operators are moving from a niche source of demand to a material occupier group.

AUTHOR: SANDRA BAUMGARTEN, SENIOR RESEARCH CONSULTANT, GERMANY

A MARKET BACK IN GROWTH

Germany’s logistics market has recovered from the weaker conditions of 2023/24. Take-up rose from around 5.3m sq m in 2024 to 6.1m sq m in 2025, and 5.5m sq m was recorded in Q1–Q3 2026, against 4.3m sq m a year earlier. Logistics providers are a key source of demand, while modern large-scale space remains constrained in several established hubs.

ASIAN OCCUPIERS STEP UP

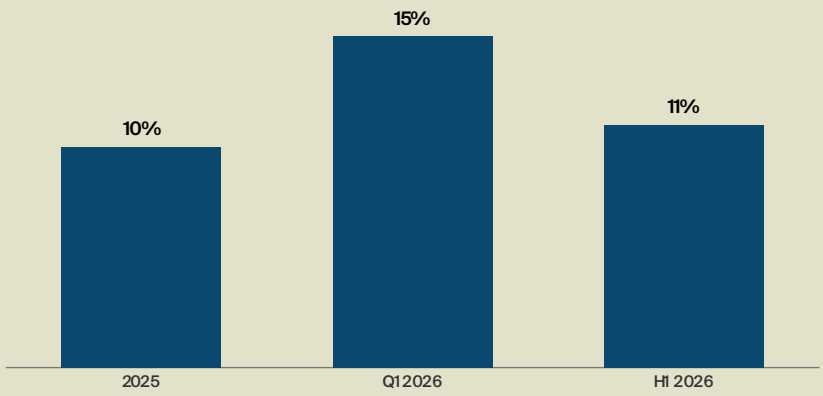
Asian occupiers accounted for around 10% of take-up in 2025, and the share peaked at 15% in Q1 2026 before settling at approximately 11% in H1 2026. GoodCang/CIRRO, JD Logistics, Winit and Sinotrans are expanding their German footprints, often targeting modern units of 20,000 sq m or more. Their growth is supporting the absorption of large logistics facilities and adds a new structural component to demand.

WHERE DEMAND IS LANDING

North Rhine-Westphalia is emerging as the main cluster, supported by its large consumer base, dense transport infrastructure and proximity to the ports of Rotterdam, Antwerp and Duisburg. Berlin-Brandenburg, Hamburg and the Rhine-Main region provide additional strategic distribution locations.

Asian occupiers are becoming a material demand driver

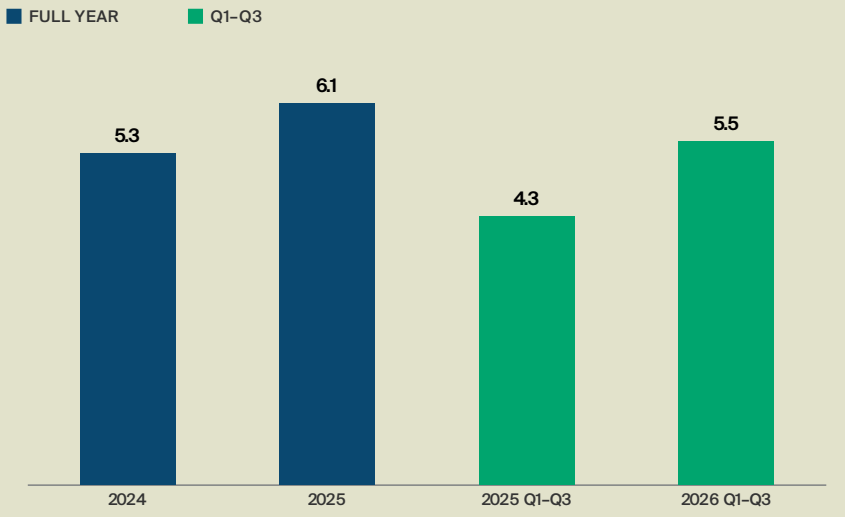
Share of total take-up by Asian occupiers, %



Source: Knight Frank Germany Research

German logistics take-up is back in growth

Total take-up, m sq m



Source: Knight Frank Germany Research

Chinese ecommerce is strengthening Belgium's role as a European logistics gateway

Chinese companies have been expanding in Belgium since the mid-2010s. The pace has picked up sharply, but the next phase is uncertain.

AUTHOR: SHANE O'NEILL, HEAD OF RESEARCH, BELGIUM

Belgium's open economy and established logistics infrastructure have helped it attract international investment. Trade outreach included the 2019 Belgian economic mission to China. The most notable early result was Cainiao, Alibaba's in-house 3PL operator, choosing Liège Airport, one of Belgium's premier cargo gateways, for its European hub. Expansion plans in the area have since been suspended.

LETTINGS ARE ACCELERATING

JD Logistics, the logistics arm of JD.com, let over 47,000 sq m of Grade A space in Willebroek on the Brussels–Antwerp axis, one of Belgium's most sought-after logistics locations. Cargo Secure let 16,000 sq m, also in Willebroek, one of the largest logistics deals recorded in 2026. Hippocampus Logistics let approximately 6,000 sq m last December in Meer, on the northern border with the Netherlands.

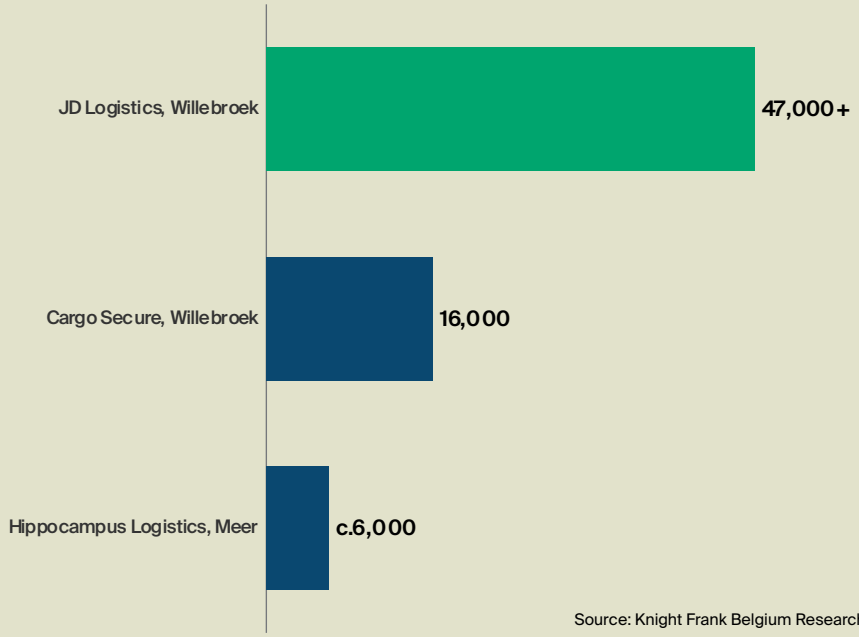
The common thread is location: Liège Airport, the Dutch border and the Brussels–Antwerp axis all offer high connectivity and market access. More lettings involving Chinese occupiers are expected in the coming months in other Belgian locations.

WHAT COULD SLOW IT

The EU-wide levy on small parcels, in place since July, will hamper demand from Chinese ecommerce platforms and their logistics partners. Early signs point to a severe contraction in turnover at SHEIN, Temu and AliExpress in the first six months of the year, with prices raised ahead of the levy.

JD Logistics' Willebroek letting is the largest of three recent deals

Selected lettings involving Chinese-linked logistics occupiers, sq m



Source: Knight Frank Belgium Research

c.70,000 sq m

Let to logistics occupiers with ties to China in the past 12 months

30,000 sq m

Cainiao's warehouse at Liège Airport, inaugurated in 2021

The rapid rise of Chinese goods and logistics

Chinese operators are set for a record year of warehouse leasing in France, spreading out from Île-de-France along the *grande dorsale*.

AUTHOR: MAGALI MARTON, HEAD OF RESEARCH, FRANCE

Imports of goods from China rose sharply in recent years, by 56% between 2017 and 2022, peaking at €79bn in 2022. After stabilising, and even edging down between 2022 and 2025, they are now heading for a new historical record: €80.4bn on a rolling 12-month basis to September 2026.

FROM FASHION TO LAPTOPS

Clothing features prominently among these imports. China is France's leading supplier, accounting for almost one in four imported garments by value (€5.75bn in the 12 months to September 2026). This growing presence now extends beyond online sales, with Paris chosen for SHEIN's first physical store. Beyond clothing, China is also France's leading supplier of furniture, from chairs and armchairs to bookcases and shelving.

However, high-value technology goods account for China's largest exports to France. By value, laptops are the single largest import from China (€4.4bn), followed closely by smartphones and mobile phones (€4.2bn). More recently, battery electric vehicles have gained significant ground (€1.9bn).

LEASING FOLLOWS THE TRADE

Warehouse leasing by Chinese companies is increasing alongside the growth in trade. 2026 is set to be a record year for leasing activity, driven notably by Zongteng and JD.com (Jingdong), which have expanded their footprint through lease renewals and new sites. These operators initially focused on Île-de-France, the largest consumer market in Europe, before expanding into other locations. Since 2025, new set-ups have spread along France's main logistics corridor, the *grande dorsale*. This strategic north–south axis gives access to almost the entire French consumer base.

Chinese operators' main logistic transactions in France
2017–2026, sq m

TENANT	YEAR	CITY & REGION	SPACE (SQ M)
ZONGTENG (JS)	2026	Evry (GPR)	37,000
ZONGTENG (JS)	2026	Gonesse (GPR)	18,000
JIUFANG	2026	Gargenville (GPR)	8,500
JINGDONG (JD)	2026	Saint-Quentin-Fallavier (38)	25,000
ALIBABA	2026	Moussy-le-Neuf (GPR)	16,600
ZONGTENG (JS)	2026	Le Coudray-Montceaux (GPR)	32,000
MINTH ELECTRICITY TECHNOLOGY (MET)	2026	Lillers (62)	22,800
JINGDONG (JD)	2025	Tournan-en-Brie (GPR)	62,800
JINGDONG (JD)	2025	Ablaincourt (80)	13,000
JINGDONG (JD)	2025	Ablaincourt (80)	12,000
ZONGTENG (JS)	2025	Saint-Mard (GPR)	12,000
JINGDONG (JD)	2021	Dugny (GPR)	14,500
AOSOM	2020	Droue-sur-Drouette (28)	12,000
ZONGTENG (JS)	2018	Gonese (GPR)	10,800
VIPSHOP.COM	2017	Compans (GPR)	5,600

Source: Knight Frank France Research

Chinese ecommerce reshapes Poland's warehouse market

How new EU customs policies are driving the expansion of Chinese ecommerce platforms and transforming Poland's logistics landscape in 2026

AUTHOR: DOROTA LACHOWSKA, HEAD OF RESEARCH, POLAND

A RAPID ACCELERATION IN DEMAND

Poland has emerged as a major destination for Chinese ecommerce operators following changes to EU customs regulations, which have triggered a surge in warehouse demand. Its proximity to Germany and the wider CEE region, established warehouse infrastructure, and competitive occupancy and labour costs make Poland a well-positioned distribution base for these markets, with additional demand supported by its sizeable domestic consumer base.

In the first three quarters of 2026, Chinese occupiers leased approximately 1m sq m of warehouse space in Poland. This exceeded the combined volume recorded over the entire previous period of their presence in the country and represented around 18% of total gross take-up.

LOWER SILESIA LEADS THE EXPANSION

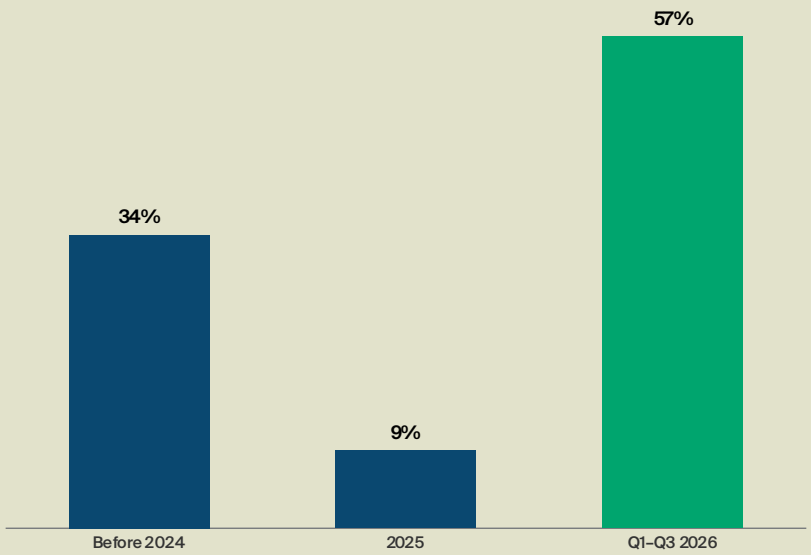
Lower Silesia, in south-western Poland, captured the initial wave of demand, providing Chinese operators with an efficient base from which to serve Germany and the wider CEE region. In Q1–Q3 2026, Chinese occupiers leased approximately 400,000 sq m in Lower Silesia, bringing their total footprint in the region to around 1m sq m. This represents 59% of all warehouse space occupied by Chinese companies across Poland.

As availability in Lower Silesia tightened, demand began to spread to other logistics locations, initially across western Poland and subsequently towards the centre of the country.

Outside Lower Silesia, Chinese operators now occupy more than 232,000 sq m in Central Poland, followed by 121,000 sq m in Upper Silesia, 116,000 sq m in the Warsaw region, 112,000 sq m in Western Poland and 90,000 sq m in Poznań region.

Chinese leasing in Q1–Q3 2026 exceeded all earlier periods combined

% of space leased by Chinese occupiers by time period



Source: Knight Frank Poland Research

59%

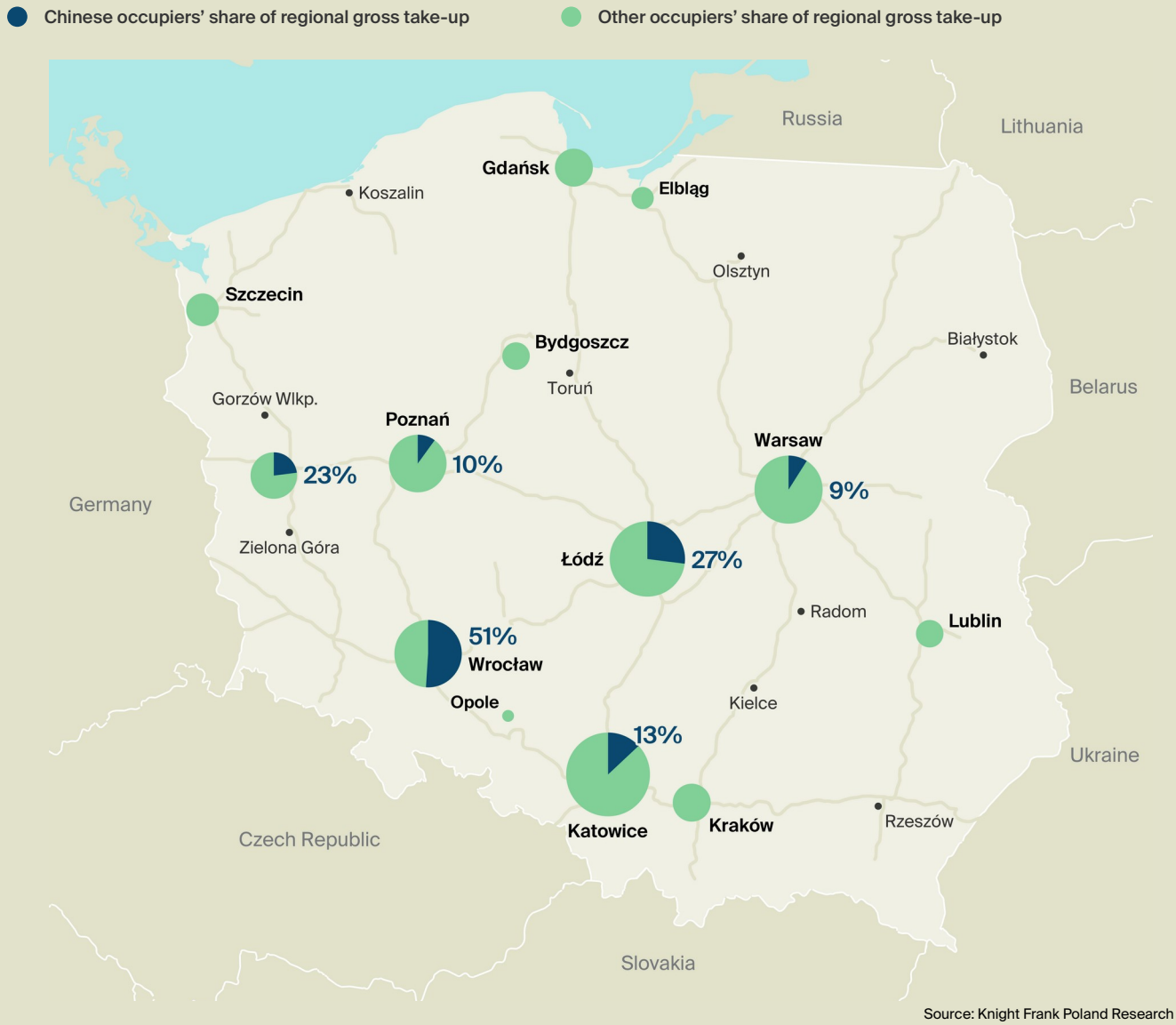
Share of Chinese-occupied space that is in Lower Silesia

5.7%

National vacancy in Q3 2026, down from 7.4% at the end of 2025

Chinese occupiers' share of regional gross take-up

Bubble size represents total gross take-up by region, Q1–Q3 2026



Source: Knight Frank Poland Research

NEW DEMAND IS TIGHTENING THE MARKET

The impact is increasingly visible in Poland's market fundamentals. Strong occupier activity helped push the national vacancy rate down from 7.4% at the end of 2025 to approximately 5.7% in Q3 2026.

Tighter availability is strengthening landlords' negotiating positions, supporting effective rental growth and reducing the scope for tenant incentives. Chinese ecommerce demand is therefore having an impact beyond headline take-up, contributing to changing conditions across parts of the logistics market.

STRUCTURAL SHIFT OR TEMPORARY SURGE?

The scale and speed of expansion mark a potentially important shift for Poland's industrial and logistics sector. Its geographic position, infrastructure and cost profile leave it well placed to remain a key distribution base for Chinese operators serving European consumers. However, the outlook remains closely linked to regulation.

Further changes to EU customs and trade rules could influence operating models and future warehouse requirements. For now, Chinese ecommerce represents a significant new source of demand, but it is too early to regard it as a structural component of the Polish logistics market.

READ THE FULL REPORT*
SCAN THE QR CODE BELOW OR
FIND IT HERE

Chinese ecommerce reshapes Poland's warehouse market

knightframe.com.pl

*available 23rd November 2026

Chinese occupiers have become a structural source of logistics demand in the Netherlands

Early activity was linked to solar, EV and machinery supply chains. Since 2025, ecommerce platforms and their logistics partners have taken over as the main driver.

AUTHOR: NL REAL ESTATE | KNIGHT FRANK

The Netherlands' combination of major ports, established logistics infrastructure and proximity to Germany has made it a natural entry point for Chinese businesses into Europe. While earlier demand was driven by sectors including solar, electric vehicles and machinery, ecommerce platforms and their logistics partners are now becoming a more important part of the market.

JD Logistics, Cainiao and CIRRO/GOFO alone have leased approximately 100,000 sq m across six transactions since the start of 2025. This concentration of activity suggests Chinese ecommerce is moving beyond opportunistic requirements and towards a more established component of logistics demand.

THREE DEMAND CORRIDORS

The locations being targeted underline the importance of connectivity. Greater Rotterdam provides access to one of Europe's principal maritime gateways, making it well suited to bulk imports and onward European distribution. Locations close to the German border provide access to Europe's largest consumer market, while Amsterdam and Schiphol support air freight and last-mile distribution.

A WIDER SUPPORTING ECOSYSTEM

Chinese freight forwarders, including CTS International, are also expanding alongside the major ecommerce and fulfilment platforms.

This matters because the shift towards European stockholding changes the logistics requirement. Rather than relying predominantly on individual parcels shipped directly from China, operators holding inventory locally require warehouse capacity that can support fulfilment, returns and onward distribution across multiple markets.

Chinese operators' main logistic transactions in Netherlands
2025-2026, sq m

TENANT	DATE	LOCATION	SPACE (SQ M)
Cainiao Group	Q4 2026	Hellevoetsluis	25,800
JD Logistics	Q4 2026	Venray	24,400
CTS International	Q1 2026	Tilburg	16,805
SolaX Power	Q4 2025	Moerdijk	15,600
CIRRO/GOFO	Q3 2025	Puttershoek	5,000
JD Logistics	Q2 2025	Widdenxveen	16,821
JD Logistics	Q1 2025	's-Heerenberg	16,866
CIRRO/GOFO	Q1 2025	Amsterdam	10,600

Source: NL Real Estate | Knight Frank

An emerging source of Irish logistics demand in a fast-evolving market

SHEIN has made the first move in Dublin, and EU customs reforms are expected to bring more Chinese demand for Irish logistics space.

AUTHOR: JOAN HENRY, CHIEF ECONOMIST & DIRECTOR, RESEARCH, IRELAND

CHINESE PLATFORMS ARE RESHAPING IRISH PARCELS

The penetration of European consumer markets by Chinese ecommerce companies, in particular SHEIN, Temu and AliExpress, is being reflected in the Irish market, with the ecommerce ecosystem beginning to evolve in response.

In terms of consumer demand, An Post* delivered 73m parcels and contract packets in 2025, compared with 54m in 2024. While Chinese platforms represent only part of this activity, they are particularly prominent at the lower parcel value end of the market. Approximately 70% of Ireland's parcel market is made up of parcels worth less than €150 each.

SHEIN MOVES FIRST, AND OTHERS COULD FOLLOW

SHEIN has become the first major Chinese ecommerce platform to establish a directly managed logistics operation in Dublin, taking direct control of a 16,000 sq ft facility at Greenogue Business Park in Rathcoole in June 2026. Temu, ByteDance and JD have taken office space and while they have considerable logistics space across mainland Europe, they have not yet entered the Irish logistics market. But there are wider trends to watch that could see that change.

EU customs reforms and the shift towards local fulfilment spaces, rather than direct shipping from China, are expected to make Chinese operators a growing source of demand for Irish logistics space in the coming years.

A TIGHT DUBLIN MARKET WITH INVESTOR APPEAL

Amazon is Ireland's largest ecommerce logistics occupier, operating a network of large-scale fulfilment and last mile delivery facilities. It offers a useful case study: Amazon occupies approximately 1m sq ft of logistics space, mostly in the Dublin market.

Overall, occupier demand for logistics space remains strong. Total take-up of logistics and industrial space reached just under 2m sq ft in the Dublin market between Q1–Q3 2026. Demand for larger, newer units is driving activity.

On the supply side, the Dublin market is very tight, with the vacancy rate close to 3%. Prime rents remained stable at €14.50 psf at the end of Q3, but are 5% higher year on year, with further upward pressure is expected for new Grade A space.

Strong occupier market conditions has increased investor interest in logistics assets in Ireland. €606m worth of industrial and logistics assets transacted during Q1–Q3 2026, (making up 34% of total investor spend), which is up from €116m in 2025. The vast majority of this increase was the acquisition of the Horizon Logistics Park in Dublin for close to €500m**, by Singapore sovereign wealth fund GIC in partnership with European logistics investment manager Valor Real Estate Partners.

Looking ahead, evolving ecommerce and supply chain models are likely to create new sources of demand for Ireland's logistics market.

SHEIN's Dublin base sits west of the M50

Location of Greenogue Business Park, Rathcoole, Co. Dublin, where SHEIN has taken a directly managed logistics facility



Note: EU Council data shows that there has been a 26% in parcels worth less than €150 entering the EU in 2025, compared to 2024. *Irish Postal Service. ** Knight Frank acted on the acquisition side

Spain could become Europe's gateway for Chinese car brands

Chinese brands took around 10% of new car purchases in 2025, up from 1.2% in 2022, creating potential demand for port-side, spare parts and after-sales logistics.

AUTHOR: DANIEL CAPRARIN, HEAD OF MARKET INTELLIGENCE & RESEARCH, SPAIN

A CAR INDUSTRY IN TRANSITION

Europe's automotive industry is undergoing a structural transformation, driven by the expansion of Chinese vehicle manufacturers and the transition towards electric mobility. Spain is exposed to this change because it is Europe's second-largest vehicle producer, behind Germany, and exports approximately 86% of its output.

Nevertheless, Spanish vehicle production remains below pre-pandemic levels. In 2025, output was approximately 548,000 units lower than in 2019, representing a decline of almost 20%. This contraction reflects factors including stronger competition from Chinese manufacturers, weak European demand partly linked to high vehicle prices, and the adaptation of Spanish factories to new technologies, platforms and production models. The decline should therefore be understood as both a cyclical slowdown and a structural reconfiguration of the industry.

WELL-PLACED TO BE A GATEWAY

At the same time, Spain is well positioned to become a major European gateway for Chinese automotive brands. Its advantages include its geographical location, port infrastructure, established automotive expertise, limited consumer attachment to domestic brands and strong road, rail and logistics networks. Chinese brands represented approximately 10% of new car purchases in Spain in 2025, compared with 1.2% in 2022 and almost zero in 2021.

This expansion is creating opportunities throughout the Spanish logistics market. Potential areas of demand include vehicle storage compounds near ports, spare-parts distribution centres, customs and inspection facilities, pre-delivery preparation services, after-sales infrastructure and battery logistics. Existing industrial sites may also attract manufacturing partnerships or conversion projects.

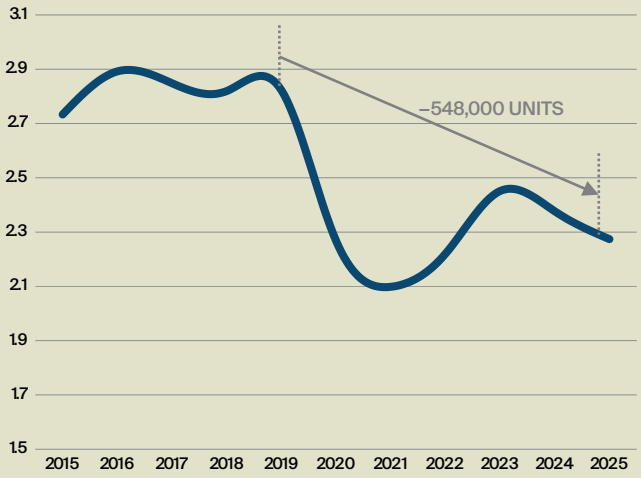
OPPORTUNITY IN BARCELONA

The former Nissan plant in Barcelona illustrates this opportunity. After closing at the end of 2021, the facility resumed production in November 2024 under the Ebro brand, with an ownership structure of approximately 60% Spanish and 40% Chinese.

The project demonstrates how Spain can reuse factories, skilled labour and supplier networks to capture new automotive investment. Spain could therefore evolve from a traditional export-oriented manufacturing base into a strategic platform for the import, distribution and production of new automotive brands across Europe.

Vehicles produced in Spain

Number of vehicles, 2015–2025, millions



Source: Knight Frank Spain Research

Suez or the Cape: two sea routes to Spain

Shipping routes via the Suez Canal and the Cape of Good Hope



We like questions. If you've got one about our research, or would like some property advice, we would love to hear from you.

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