



2Q'  
2020

## Industrial Market Overview

### Market Trends

Industrial

CIUDAD JUAREZ	2Q 2018	2Q 2019	2Q 2020	Annual Trend
Total Industrial Space Available (SF)	2.29 M	0.91 M	2.17 M	↑
Vacancy Rate (%)	3.82%	1.53%	3.00%	↑
Asking Lease Rates (Class A - US/SF/Month)	\$.36-\$.39	\$.38-\$.41	\$.40-\$.45	↑
Under Construction (SF)	0.52 M	1.22 M	1.42 M	↑

### Opportunities for Tenants

Changes in Leasing Conditions

CIUDAD JUAREZ	2Q 2018	2Q 2019	2Q 2020	Annual Trend
Free Rent (Months)	1 - 3	2 - 3	2 - 3	↑
Tenant Improvement Allowance	2 - 3	2 - 3	2 - 3	↔
Developer TI's Amortization	Low	Low	Low	↔
Annual Rental Escalations	USCPI	USCPI	USCPI	↔

### NAI Mexico Full Coverage



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### How Can NAI Support Your 2020 Plan?

Mexico vs. Country Comparison Analysis | Total Occupancy Cost Comparison Analysis  
 Mexico Relocation | Site Selection | Valuation | Sales Lease Back | Lease Recast  
 Lease vs. Purchase | Construction/Tenant Improvements