



## Market Trends

### Industrial

MONTERREY	2Q 2018	2Q 2019	2Q 2020	Annual Trend
Total Industrial Space Available (SF)	1.30 M	5.30 M	8.12 M	↑
Vacancy Rate (%)	3.45%	4.62%	6.06%	↑
Asking Lease Rates (Class A - US/SF/Month)	\$ .39-\$ .44	\$ .40-\$ .43	\$ .38-\$ .42	↓
Under Construction (SF)	0.39 M	1.94 M	2.37 M	↑

## Opportunities for Tenants

### Changes in Leasing Conditions

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

## NAI Mexico Full Coverage



## Major Industrial Transactions

COMPANY NAME	Type	Size
Ancor	Lease	75,627 SF
Hill Country	Lease	45,854 SF
Laboratorios Pisa	Lease	39,317 SF
Confidential	Lease	30,280 SF
Perfect Balance	Lease	26,193 SF

## 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

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