NAI Mexico

Q4 2024 BUSINESS INTELLIGENCE Industrial Market Trends
REYNOSA

Northwest
Tijuana
Mexicali
Hermosillo
Nogales
Ensenada
Tecate
Rosarito

Northcentral
Ciudad Juarez
Chihuahua
Durango

Northeast
Monterrey
Saltillo
Torreon
Reynosa
Matamoros
Nuevo Laredo

Bajio
Guanajuato
Queretaro
Guadalajara
San Luis Potosi
Aguascalientes
Lagos de Moreno

Central
Mexico City
Toluca
Puebla

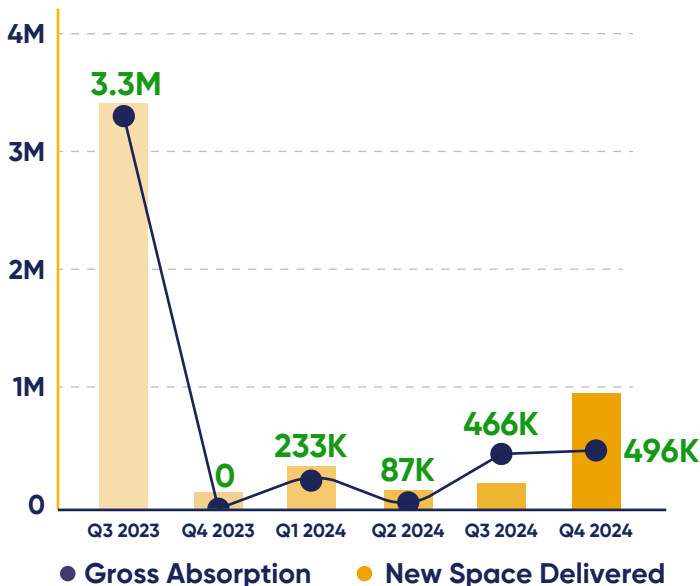BUSINESS INTELLIGENCE | LEVEL 1

NAIMEXICO.COM

NORTHEAST REGION

NUEVO LEON
Monterrey

COAHUILA
Saltillo
Torreon

TAMAULIPAS
Reynosa
Matamoros
Nuevo Laredo

REYNOSA

REYNOSA

HISTORIC DEMAND AND NEW SPACE DELIVERED (SF)

- **Gross Absorption**
- **New Space Delivered**

Q3 2023: 3.3M
Q4 2023: 0
Q1 2024: 233K
Q2 2024: 87K
Q3 2024: 466K
Q4 2024: 496K

MARKET ACTIVITY

Gross Absorption: A total of 496K SF was absorbed, consisting of:

- 250K SF of newly delivered and occupied space.
- 246K SF of existing space occupied.

Availability: Increased to 3.1M SF, due to:

- 699K SF of available space delivered.
- 313K SF of vacated space.

MARKET LEVERAGE

TENANT   OWNER

Given the increase in availability and the relatively low demand for space in recent quarters, tenants have more leverage.

MAIN INDICATORS LEVEL 1 (SF) ▲▼ Previous Quarter Difference

	MARKET SIZE	AVAILABILITY	VACANCY	GROSS ABSORPTION	NET ABSORPTION	AVG. LEASE RATE (US$/Mo)
CURRENT QTR	41.4M	3.1M	7.52%	496K		
PAST QTR	40.4M	2.3M	5.80%	466.7K		
CHANGE	▲949.4K	▲766.1K	▲1.72%	▲29.3K		

CONTACT US FOR LEVEL 2 REPORT

WHERE CAN WE HELP YOU NEXT?

Gary Swedback - CEO NAI Mexico
gswedback@naimexico.com | +1 (619) 665 5391

LEVEL 1 GLOSSARY

Market Size
The combined size, stated in square feet, of all the industrial buildings, distribution centers and warehouses that physically exist in the market for this quarter.

Gross Absorption
All physically existing space that was newly occupied by a tenant or buyer during the quarter; the sum of existing space leased (or acquired) and buildings that finished construction and are newly occupied by a tenant upon delivery (BTS and pre-leased Spec.).

Availability
The combined size, stated in square feet, of all the industrial buildings, distribution centers and warehouses that physically exist and are currently available in the market for this quarter.
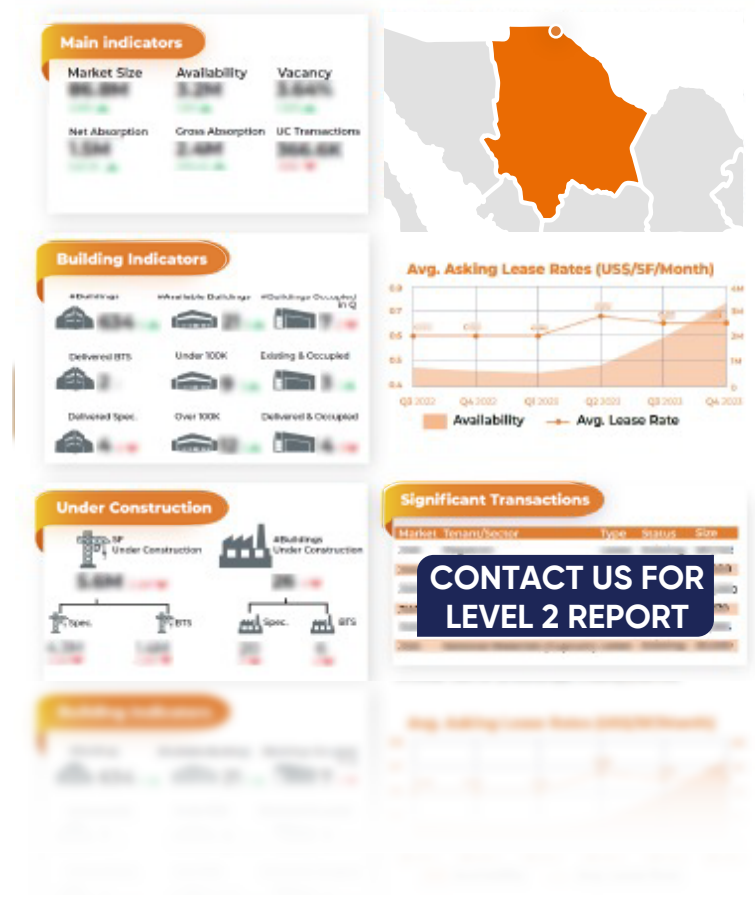
Net Absorption
The resulting subtraction of all physically existing space newly occupied during the quarter minus the space that has become available during the period; Gross Absorption minus Vacated space and Delivered & Available Spec.

Vacancy
The percentage of all existing space currently available in relation to the total size of the market.

Avg. Lease Rate
The monthly lease rate per square foot that, on average, the owners of all available buildings are requesting.

Need access to more industrial analytics?
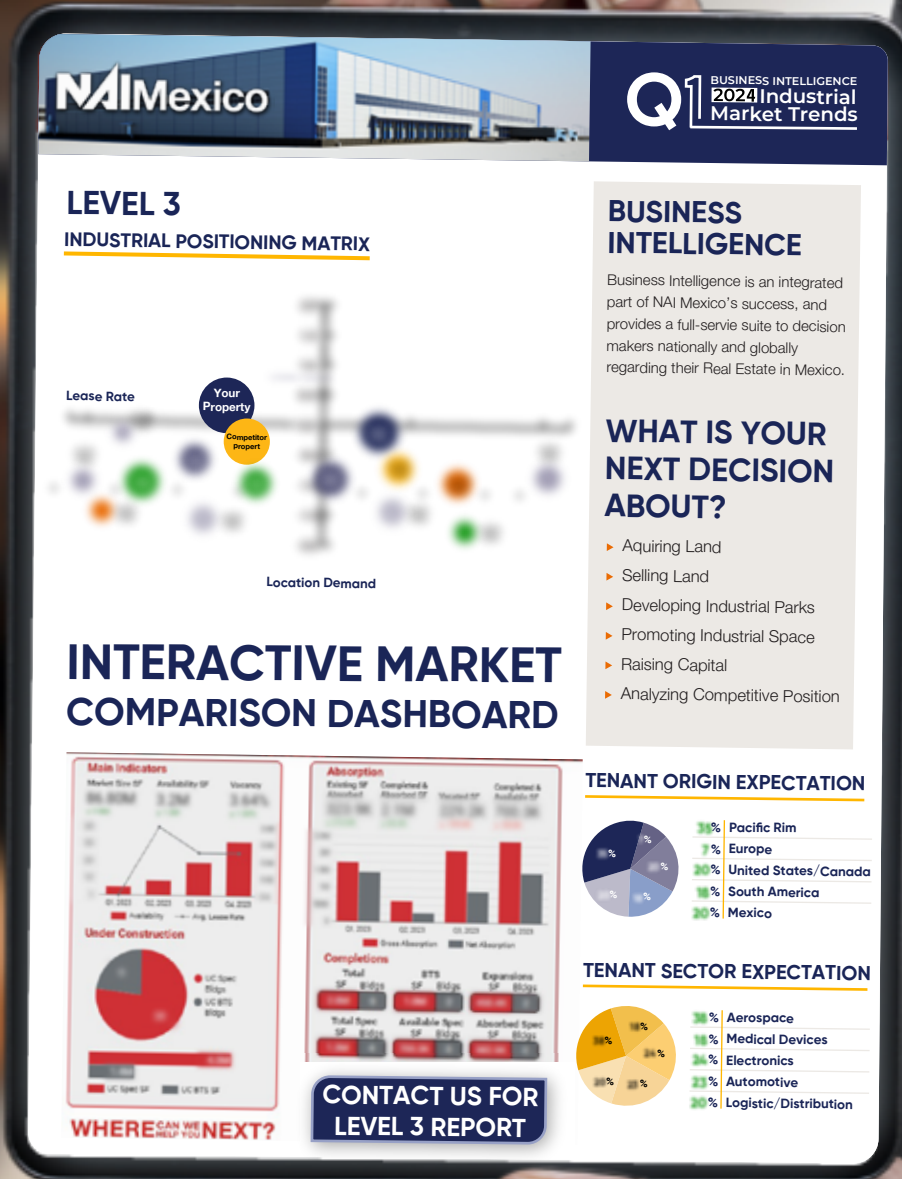
• Access to Level 2 "decision-making" KPI'S

CONTACT US FOR LEVEL 2 REPORT

Access Levels & Benefits

KPIs	LEVEL 1 MEXICO REAL ESTATE ANALYTICS	LEVEL 2 ADVANCED MEXICO BUSINESS INTELLIGENCE	LEVEL 3 STRATEGIC PLANNING SUITE
Number of KPIs available	**6**	**25**	**52+**
Gross Absorption	✓	✓	✓
Vacancy	✓	✓	✓
Market Size	✓	✓	✓
Available SF	○	✓	✓
Available Buildings per size	○	○	✓
*Upon request			
Markets summaries			
Basic market description	✓	✓	✓
In-depth analysis	○	○	✓
Interactive dashboard			
Basic	○	✓	✓
All markets	○	✓	✓
Regional and national	○	○	✓
Multi-market comparison	○	○	✓
Market analysis			
Single market	○	✓	✓
Multi-market analysis	○	○	✓
Developer/Owner tools			
Building competitive position	○	○	✓
Future tenant/origin expectation	○	○	✓
Location analysis	○	○	✓
Building requeriment analysis	○	○	✓
Strategic Planning Report	○	○	✓
NAI Mexico support services			
Local broker project Support	○	✓	✓
Management consulting	○	○	✓

WHERE CAN WE HELP YOU NEXT?

Gary Swedback - CEO NAI Mexico
gswedback@naimexico.com | +1 (619) 665 5391

NEED ACCESS TO MORE INDUSTRIAL ANALYTICS

- **NEED TAILOR MADE ANALYTICS FOR YOUR PROJECT?** REQUEST LEVEL 3 ACCESS

NAIMexico

Q1 2024 Industrial Market Trends
BUSINESS INTELLIGENCE

LEVEL 3
INDUSTRIAL POSITIONING MATRIX

Lease Rate

Your Property

Competitor Property

Location Demand

INTERACTIVE MARKET COMPARISON DASHBOARD

Main Indicators

Absorption

Under Construction

Completions

WHERE CAN WE HELP YOU NEXT?

CONTACT US FOR LEVEL 3 REPORT

BUSINESS INTELLIGENCE

Business Intelligence is an integrated part of NAI Mexico's success, and provides a full-servie suite to decision makers nationally and globally regarding their Real Estate in Mexico.

WHAT IS YOUR NEXT DECISION ABOUT?

- ▸ Aquiring Land
- ▸ Selling Land
- ▸ Developing Industrial Parks
- ▸ Promoting Industrial Space
- ▸ Raising Capital
- ▸ Analyzing Competitive Position

TENANT ORIGIN EXPECTATION

- 38% Pacific Rim
- 7% Europe
- 20% United States/Canada
- 16% South America
- 20% Mexico

TENANT SECTOR EXPECTATION

- 38% Aerospace
- 18% Medical Devices
- 34% Electronics
- 23% Automotive
- 20% Logistic/Distribution

WHERE CAN WE HELP YOU NEXT?

Gary Swedback - CEO NAI Mexico
gswedback@naimexico.com | +1 (619) 665 5391