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

TORREON

NORTHEAST REGION

NUEVO LEON	COAHUILA	TAMAULIPAS
Monterrey	Saltillo	Reynosa
	Torreon	Matamoros
		Nuevo Laredo

TORREON

HISTORIC DEMAND AND NEW SPACE DELIVERED (SF)

Chart values — Gross Absorption: Q3 2023: 24K; Q4 2023: 177K; Q1 2024: 575K; Q2 2024: 531K; Q3 2024: 124K; Q4 2024: 548K

- Gross Absorption
- New Space Delivered
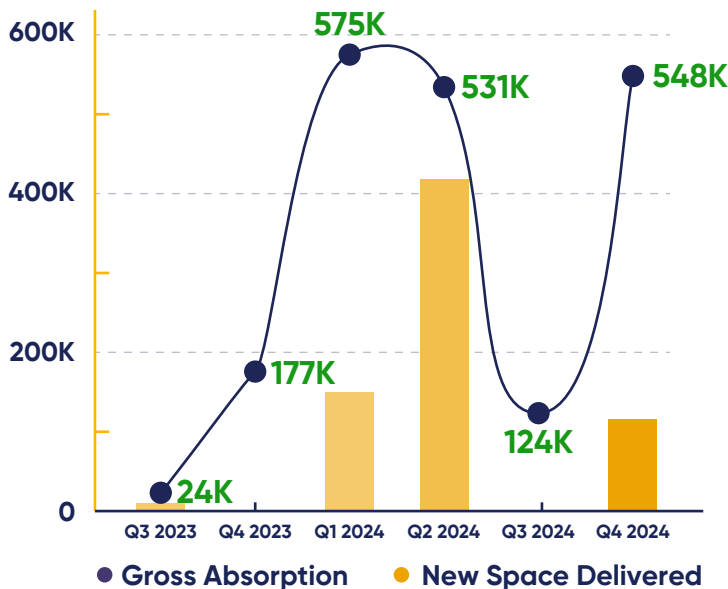
MARKET ACTIVITY

Gross Absorption: A total of 548K SF was absorbed, consisting of existing space occupied.

Availability: Decreased to 1.66M SF, given the positive absorption.

MARKET LEVERAGE

TENANT   OWNER

With high availability, tenants currently have more leverage. However, demand in the market has been increasing, which could grant owners some leverage in the future.

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

	MARKET SIZE	AVAILABILITY	VACANCY	GROSS ABSORPTION	NET ABSORPTION	AVG. LEASE RATE (US$/Mo)
CURRENT QTR	54.4M	1.7M	3.05%	548.3K		
PAST QTR	54.3M	2.1M	3.85%	124.4K		
CHANGE	▲115.4K	▼-431K	▼-0.80%	▲423.9K		

CONTACT US FOR LEVEL 2 REPORT

WHERE CAN WE HELP YOU NEXT?

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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.

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.

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

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.).
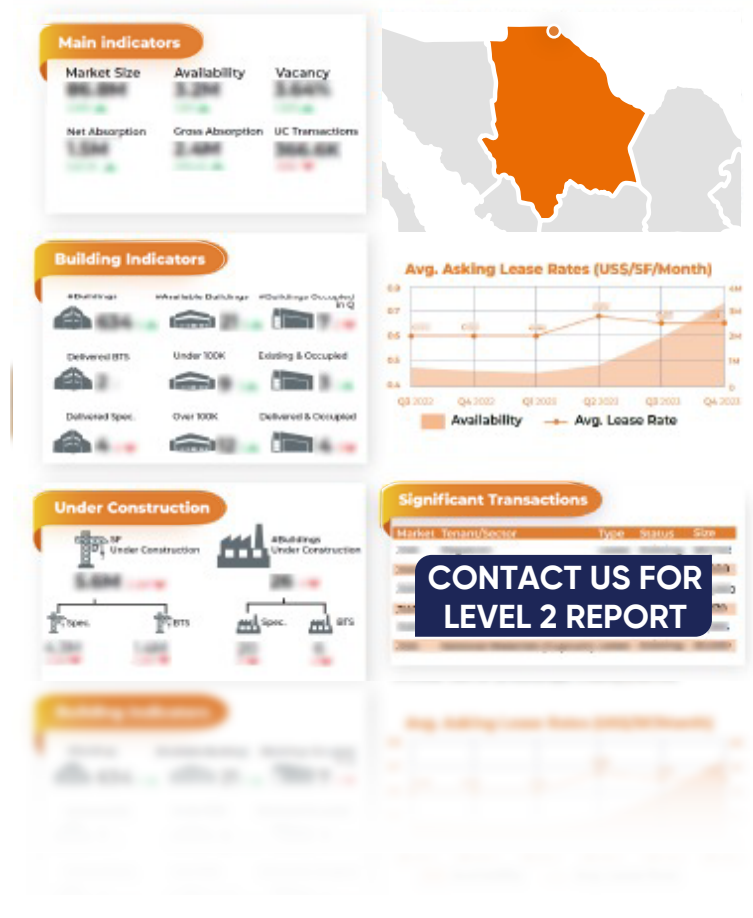
Net Absorption
The resulting subtraction of all physically existing space newly occupied during the quarter minus the space that has become available during the period; Gross Absorption minus Vacated space and Delivered & Available Spec.

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	◌	◌	✅

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NEED ACCESS TO MORE INDUSTRIAL ANALYTICS

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

NAIMexico

Tablet Report

NAIMexico

Q1 2024 BUSINESS INTELLIGENCE Industrial Market Trends

LEVEL 3
INDUSTRIAL POSITIONING MATRIX

Lease Rate

Your Property

Competitor Property

Location Demand

INTERACTIVE MARKET
COMPARISON DASHBOARD

Main Indicators

Absorption

Under Construction

Completions

CONTACT US FOR LEVEL 3 REPORT

WHERE CAN WE HELP YOU NEXT?

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

- 35% Pacific Rim
- 7% Europe
- 20% United States/Canada
- 18% South America
- 20% Mexico

TENANT SECTOR EXPECTATION

- 38% Aerospace
- 18% Medical Devices
- 24% Electronics
- 23% Automotive
- 20% Logistic/Distribution

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