NAIMexico

Q1 BUSINESS INTELLIGENCE 2025 Industrial Market Trends

CIUDAD JUAREZ

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

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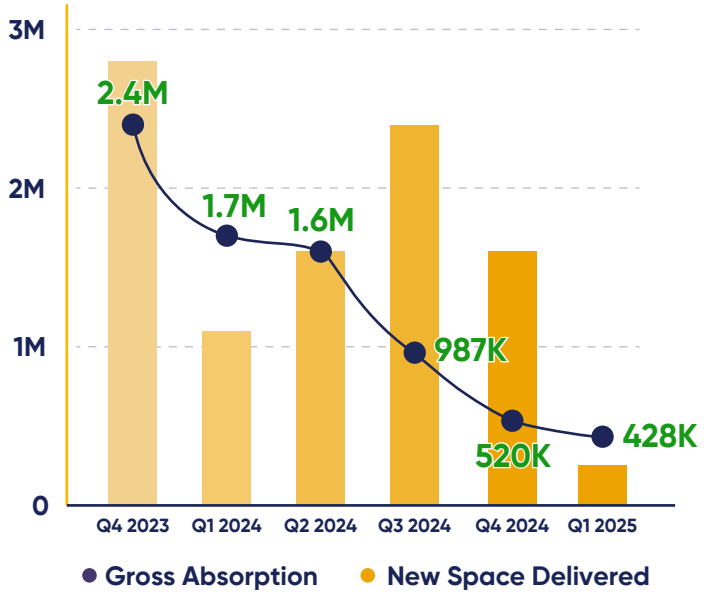
METRO AREA OVERVIEW

With 1.5 Million people, Juarez is the largest city in Chihuahua, and the second largest on the US-Mexico border. Together with El Paso in Texas and Las Cruces in New Mexico, the city forms part of a binational region known as the Borderplex. Since the 1980's, Juarez's skilled workforce and logistics advantages for both rail and highway modalities have attracted a wide range of global manufacturers, assemblers and logistics companies. Juarez has more than 20 universities that offer undergraduate and advanced degrees.

INDUSTRIAL MARKET OVERVIEW

Foreign manufacturing and logistics operations represent the largest economic sector in Juarez, employing more than 300,000 workers. Currently the city hosts more than 600 industrial buildings situated in about 60 industrial parks and zones. In the past 24 months, 16 developers began construction in Juarez, rapidly increasing the industrial market size. Automotive, electronics and textiles are the top 3 largest sectors in the city. Currently, the biggest foreign employers in the city are Lear, Delphi, and Johnson and Johnson. Other large companies include Foxconn, Jabil Circuit, and Flextronics.

HISTORIC DEMAND AND NEW SPACE DELIVERED (SF)



MARKET ACTIVITY

Gross Absorption: A total of 428K SF was absorbed, consisting of existing space occupied.

Availability: Slightly increased to 8.45M SF, due to:

- 251K SF of available space delivered.
- 142K SF of vacated space.
- 330K SF of additional space available by sublease.

MARKET LEVERAGE

Tenant leverage has increased as a result of declining absorption and increasing availability in the market. However, an uptick in demand can be expected over the course of the year, which will decrease tenant leverage.

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

	MARKET SIZE	AVAILABILITY	VACANCY	GROSS ABSORPTION	NET ABSORPTION	AVG. LEASE RATE (US$/Mo)
CURRENT QTR	93.8M	8.5M	9.01%	428.4K		
PAST QTR	93.5M	8.3M	8.82%	520.5K		
CHANGE	▲ 251.1K	▲ 197.1K	▲ 0.19%	▼ -92.1K		

CONTACT US FOR LEVEL 2 REPORT

WHERE CAN WE HELP YOU NEXT?

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All measurements are in square feet | Market Size, Vacancy an Availability are based on existing buildings, excluding under construction | No warranty or representation, express or implied, is made as to the accuracy of the information.

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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**

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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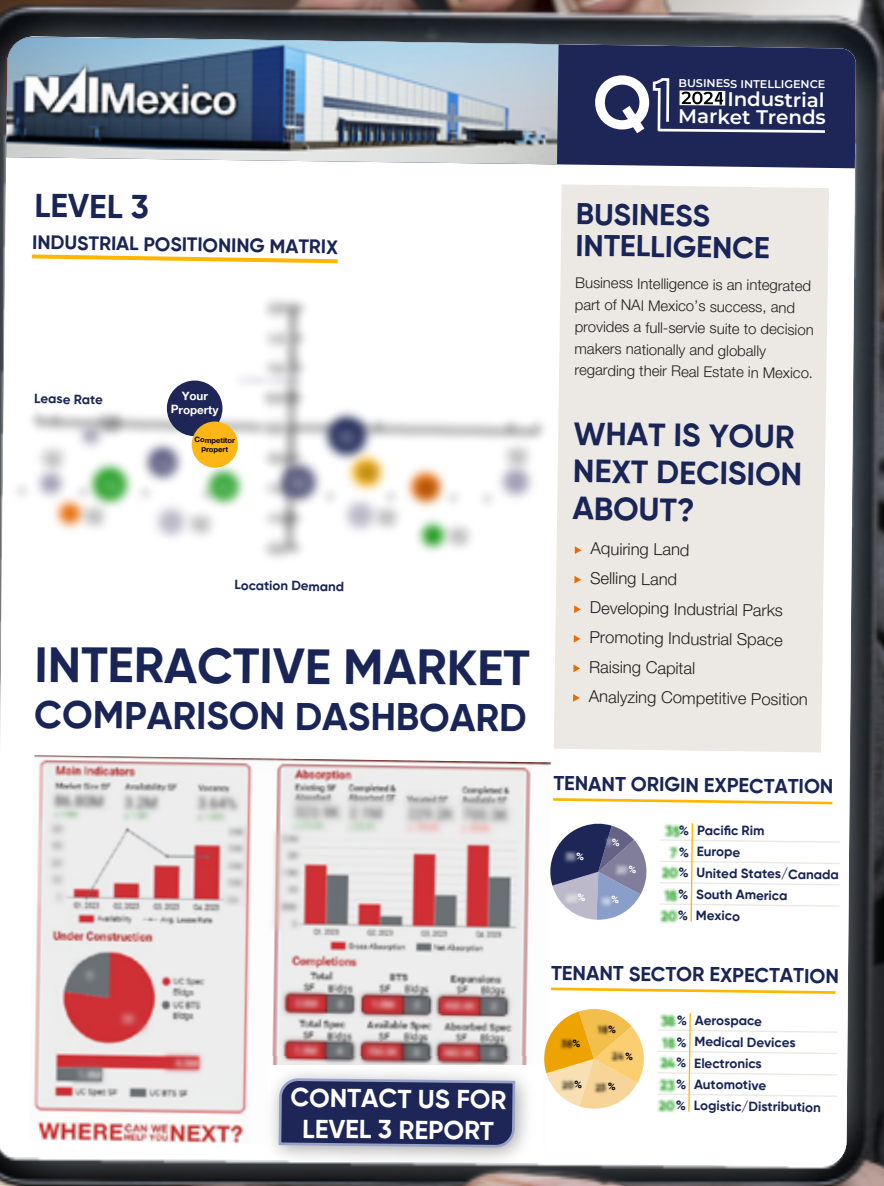
NEED ACCESS TO MORE INDUSTRIAL ANALYTICS

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



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