



Northwest	Northcentral	Northeast	Bajío	Central
Tijuana	Ciudad Juarez	Monterrey	Guanajuato	Mexico City
Mexicali	Chihuahua	Saltillo	Queretaro	Toluca
Hermosillo	Durango	Torreon	Guadalajara	Puebla
Nogales		Reynosa	San Luis Potosi	
Ensenada		Matamoros	Agascalientes	
Tecate		Nuevo Laredo	Lagos de Moreno	
Rosarito				



ENSENADA

NORTHWEST REGION

BAJA CALIFORNIA

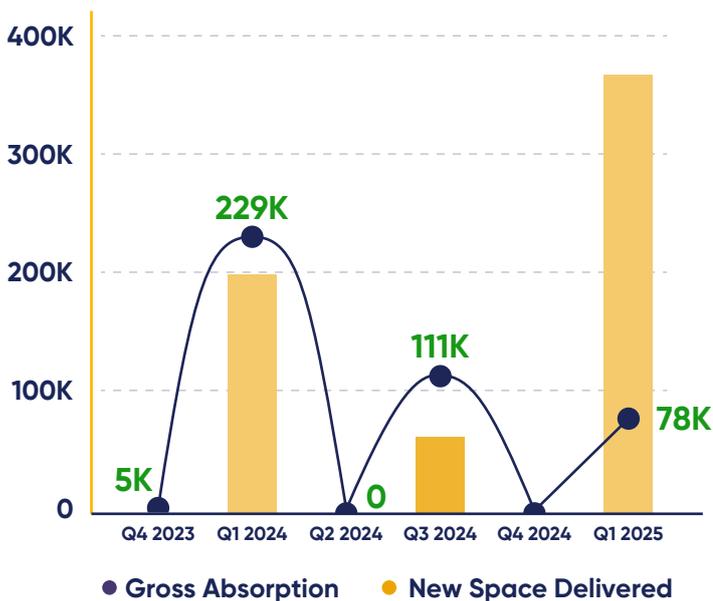
Tijuana
Mexicali
Ensenada
Tecate
Rosarito

SONORA

Hermosillo
Nogales



HISTORIC DEMAND AND NEW SPACE DELIVERED (SF)



MARKET ACTIVITY

Gross Absorption: A total of 78K SF was absorbed, consisting of:

- 67K SF of newly delivered and occupied space.
- 11K SF of existing space occupied.

Availability: Increased to 488K SF, due to:

- 300K SF of available space delivered.
- 100K SF of vacated space.

MARKET LEVERAGE



Given the moderate demand and current high availability, leverage between tenants and owners is even.

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

	MARKET SIZE	AVAILABILITY	VACANCY	GROSS ABSORPTION	NET ABSORPTION	AVG. LEASE RATE (US\$/Mo)
CURRENT QTR	9.4M	488.7K	5.20%	78.6K		
PAST QTR	9M	99.2K	1.10%	0.0		
CHANGE	▲ 367.3K	▲ 389.4K	▲ 4.10%	▲ 78.6K		

**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.

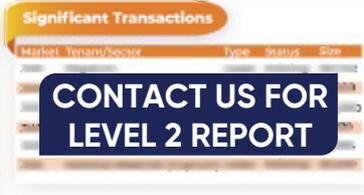
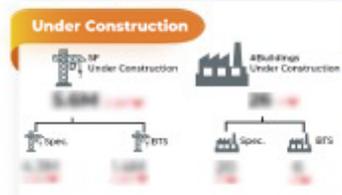
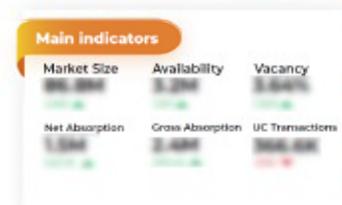
Avg. Lease Rate

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

Access Levels & Benefits



CONTACT US FOR LEVEL 2 REPORT

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 requirement 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**



Q1 BUSINESS INTELLIGENCE
2024 Industrial Market Trends

LEVEL 3 INDUSTRIAL POSITIONING MATRIX

Lease Rate

Your Property

Competitor Property

Location Demand

BUSINESS INTELLIGENCE

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

WHAT IS YOUR NEXT DECISION ABOUT?

- ▶ Acquiring Land
- ▶ Selling Land
- ▶ Developing Industrial Parks
- ▶ Promoting Industrial Space
- ▶ Raising Capital
- ▶ Analyzing Competitive Position

INTERACTIVE MARKET COMPARISON DASHBOARD

Main Indicators

Market Size SF	Availability SF	Vacancy
\$B, \$MM	3,25M	3.64%

Under Construction

UC Spec Bldgs	UC BTS Bldgs
100%	0%

Absorption

Existing SF Absorbed	Completed & Absorbed SF	Vacant SF	Completed & Available SF
1,200,000	1,100,000	200,000	100,000

Completions

Total SF Bldgs	BTS SF Bldgs	Expansions SF Bldgs
1,000,000	500,000	200,000

TENANT ORIGIN EXPECTATION

- 31% 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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All measurements are in square feet | Market Size, Vacancy and 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.