NAI Mexico

BUSINESS INTELLIGENCE

Q1 2025 Industrial Market Trends

REYNOSA

Northwest	Northcentral	Northeast	Bajio	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	Aguascalientes	
Tecate		Nuevo Laredo	Lagos de Moreno	
Rosarito				

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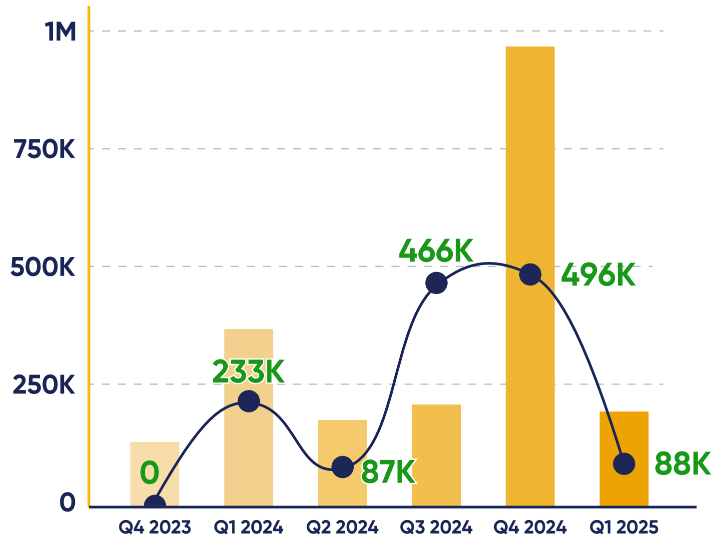
NORTHEAST REGION

NUEVO LEON	COAHUILA	TAMAULIPAS
Monterrey	Saltillo	**Reynosa**
	Torreon	Matamoros
		Nuevo Laredo

HISTORIC DEMAND AND NEW SPACE DELIVERED (SF)



MARKET ACTIVITY

Gross Absorption: A total of 88K SF was absorbed, consisting of existing space occupied.

Availability: Increased to 3.32M SF, due to:

- 192K SF of available space delivered.
- 65K SF of vacated space.

MARKET LEVERAGE

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	41.6M	3.3M	7.98%	87.8K		
PAST QTR	41.4M	3.1M	7.52%	496K		
CHANGE	▲191.8K	▲206.3K	▲0.46%	▼-408.2K		

CONTACT US FOR LEVEL 2 REPORT

WHERE CAN WE HELP YOU NEXT?

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Q1 BUSINESS INTELLIGENCE
2025 Industrial Market Trends

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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Q1 BUSINESS INTELLIGENCE 2024 Industrial Market Trends
LEVEL 3
INDUSTRIAL POSITIONING MATRIX
Lease Rate
Your Property
Competitor propert
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
% Pacific Rim
% Europe
% United States/Canada
% South America
% Mexico
TENANT SECTOR EXPECTATION
% Aerospace
% Medical Devices
% Electronics
% Automotive
% Logistic/Distribution
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.