NAIMexico

BUSINESS INTELLIGENCE

Q1 2025 Industrial Market Trends

SALTILLO

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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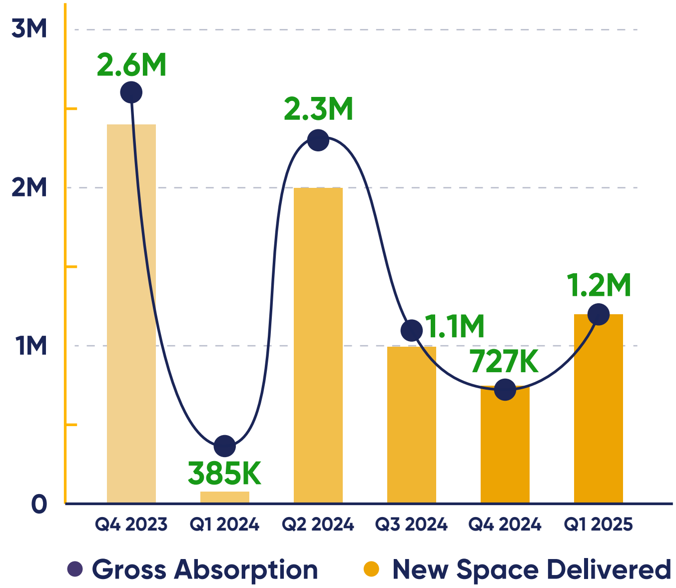
NORTHEAST REGION

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 1.2M SF was absorbed, consisting of:

- 1.1M SF of newly delivered and occupied space.
- 97K SF of existing space occupied.

Availability: Increased to 792K SF, due to:

- 126K SF of available space delivered.
- 110K SF of vacated space.

MARKET LEVERAGE

Given the low availability, owners have more leverage in the market. However, the majority of speculative buildings under construction haven't been pre-leased, which could increase availability once they're delivered.

MAIN INDICATORS LEVEL 1 (SF)

Previous Quarter Difference

	MARKET SIZE	AVAILABILITY	VACANCY	GROSS ABSORPTION	NET ABSORPTION	AVG. LEASE RATE (US$/Mo)
CURRENT QTR	65.1M	792.6K	1.22%	1.2M	[illegible]	[illegible]
PAST QTR	63.9M	653.2K	1.02%	727.2K	[illegible]	[illegible]
CHANGE	▲1.2M	▲139.4K	▲0.19%	▲462.1K	[illegible]	[illegible]

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

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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NAI Mexico

NEED ACCESS TO MORE INDUSTRIAL ANALYTICS

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

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