

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



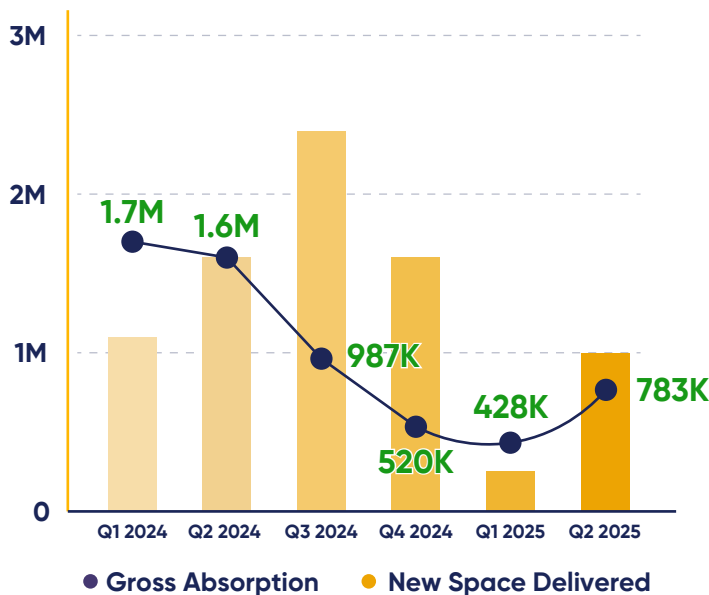
METRO AREA OVERVIEW

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 783K SF was absorbed, consisting of:

- 286K SF of newly delivered and occupied space.
- 497K of existing space occupied.

Availability: Increased to 9.1M SF, due to:

- 760K SF of available space delivered.
- 411K SF of vacated space.

MARKET LEVERAGE



The continuous increase in availability that the market has been experiencing for over a year has continued to shift leverage in favor of tenants. Even though owners have not been willing to lower their lease rates, they have been offering additional benefits to attract clients, such as free months rent. However, a probable uptick in demand coupled with the current decrease in construction could lower availability in upcoming months.

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

	MARKET SIZE	AVAILABILITY	VACANCY	GROSS ABSORPTION	NET ABSORPTION	AVG. LEASE RATE (US\$/Mo)
CURRENT QTR	94.8M	9.1M	9.62%	783.3K		
PAST QTR	93.8M	8.5M	9.01%	418.4K		
CHANGE	▲1M	▲674.6K	▲0.61%	▲354.9K		

**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 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.

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 requirement analysis	✓	✓	✓
Strategic Planning Report	✓	✓	✓
NAI Mexico support services			
Local broker project Support	✓	✓	✓
Management consulting	✓	✓	✓

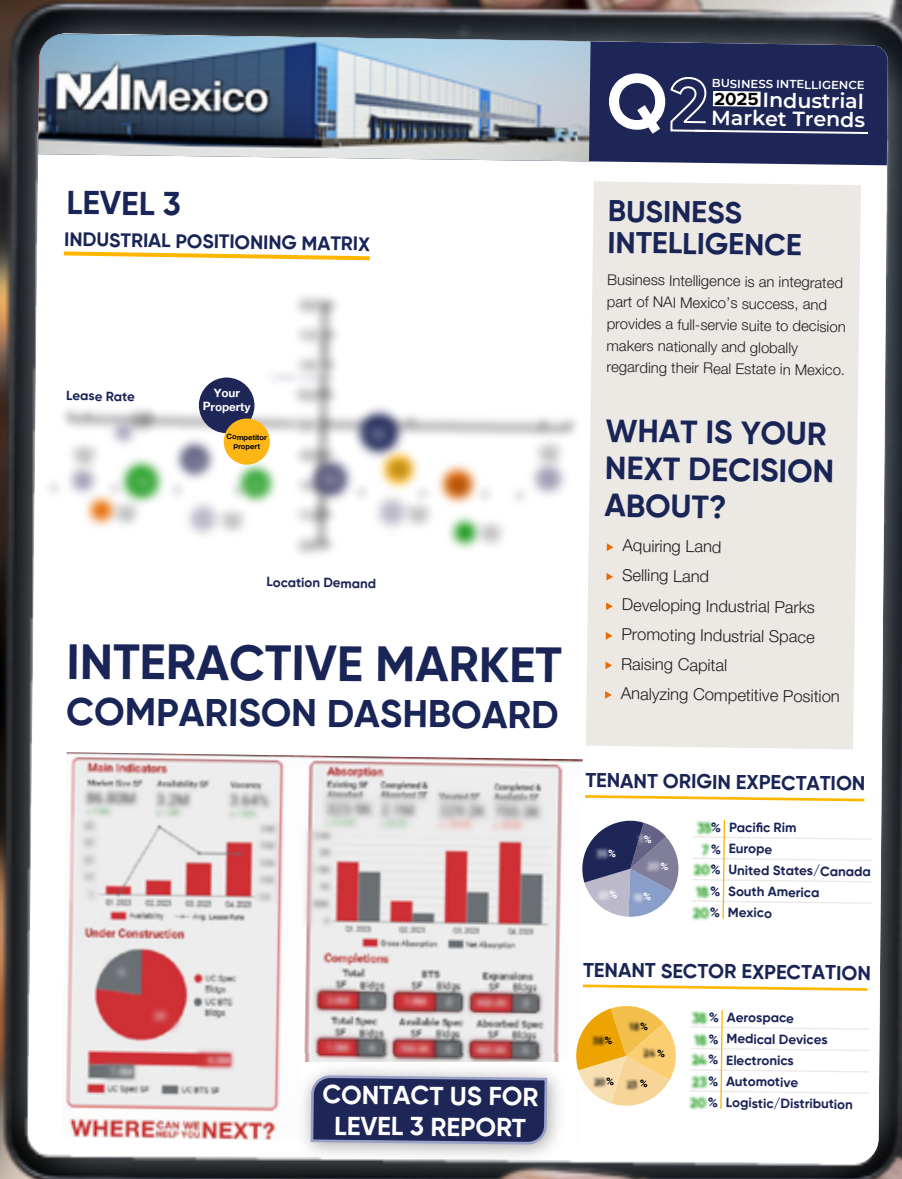
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NEED ACCESS TO MORE INDUSTRIAL ANALYTICS

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



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