

Northwest

Tijuana
 Mexicali
 Hermosillo
 Nogales
 Ensenada
 Tecate
 Rosarito

Northcentral

Ciudad Juarez
 Chihuahua
 Durango

Northeast

Monterrey
 Saltillo
 Torreon
 Reynosa
 Matamoros
 Nuevo Laredo

Bajío

Guanajuato
 Queretaro
Guadalajara
 San Luis Potosi
 Aguascalientes
 Lagos de Moreno

Central

Mexico City
 Toluca
 Puebla

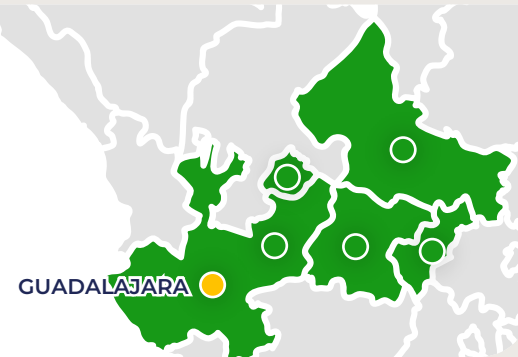


BAJIO REGION

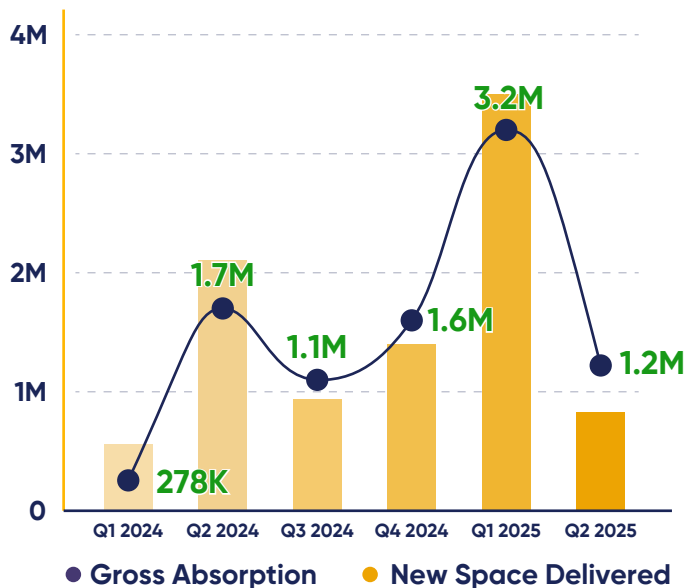
Guanajuato
Queretaro
San Luis Potosi
Aguascalientes

Guadalajara

Lagos de Moreno



HISTORIC DEMAND AND NEW SPACE DELIVERED (SF)



MARKET ACTIVITY

Gross Absorption: A total of 1.16M SF was absorbed, consisting of:

- 436K SF of newly delivered and occupied space.
- 723K SF of existing space occupied.

Availability: A total of 3.6M SF is currently available, very similar to the previous quarter.

MARKET LEVERAGE



Owners have had significant leverage in past quarters, due to high demand for space in the market. However, given the current availability, owner leverage has decreased as a result. Additionally, Q2 registered the highest construction for any quarter of the past 5 years, which will likely cause availability to increase even more.

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

	MARKET SIZE	AVAILABILITY	VACANCY	GROSS ABSORPTION	NET ABSORPTION	AVG. LEASE RATE (US\$/Mo)
CURRENT QTR	60.3M	3.6M	6.05%	1.2M		
PAST QTR	59.4M	3.7M	6.20%	3.2M		
CHANGE	▲825.4K	▼-36.7K	▼-0.15%	▼-2M		

CONTACT US FOR
LEVEL 2 REPORT

WHERE CAN WE HELP YOU NEXT?

Gary Swedback - CEO NAI Mexico
gswedback@naimexico.com | +1 (619) 665 5391

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



Main indicators

Market Size	Availability	Vacancy
85,000	3,200	3.6%
Net Absorption	Gross Absorption	UC Transactions
1,500	2,400	800,000



Building Indicators

#Buildings	Industrial Buildings	#Buildings Occupied
1,200	1,200	1,200
Delivered BTS	Under 100K	Existing & Occupied
1,200	1,200	1,200
Delivered Spec.	Over 100K	Delivered & Occupied
1,200	1,200	1,200

Avg. Asking Lease Rates (US\$/SF/Month)



Under Construction

#Buildings Under Construction	#Buildings Under Construction
1,200	1,200
Delivered Spec.	Delivered & Occupied
1,200	1,200

Significant Transactions

Market	Tenant/Owner	Type	Status	Size
1,200	1,200	1,200	1,200	1,200

CONTACT US FOR
LEVEL 2 REPORT

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	✓	✓	✓

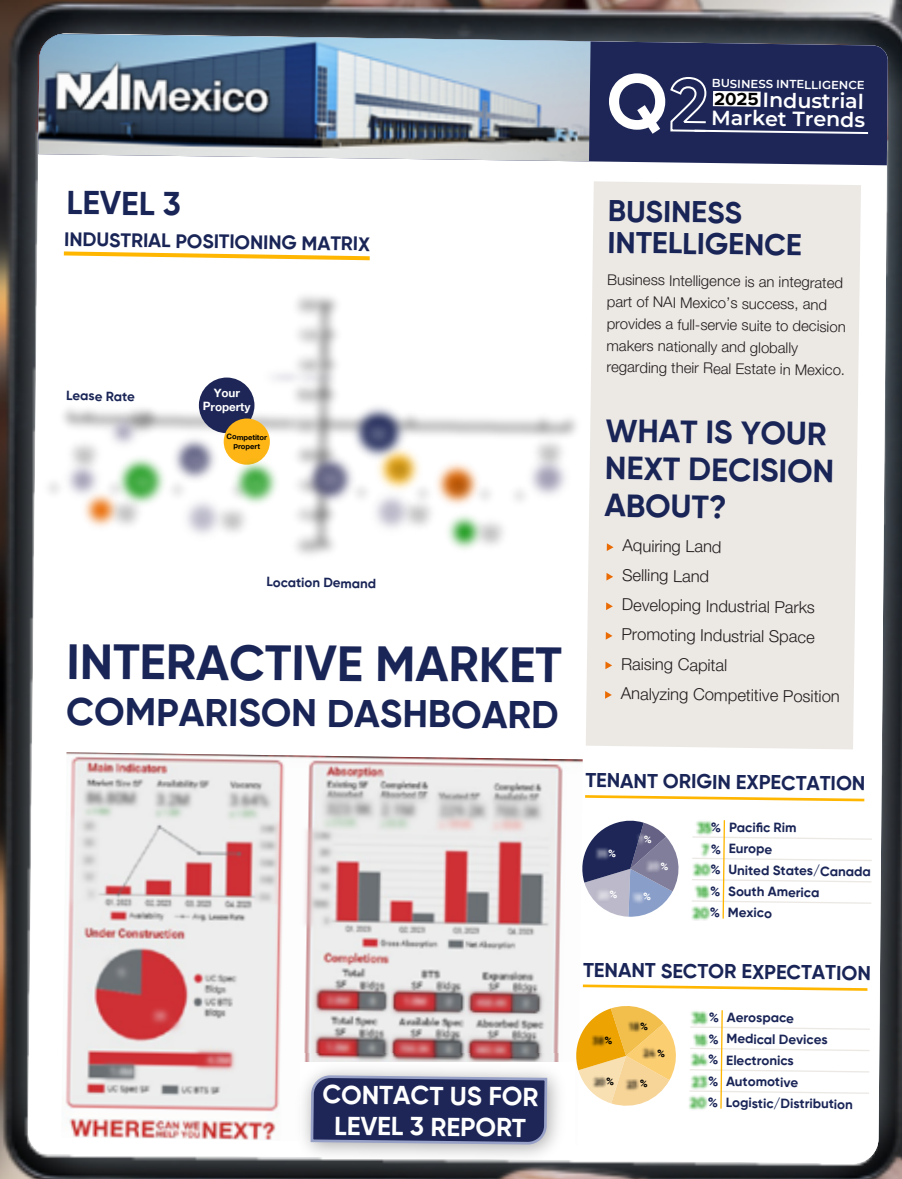
WHERE CAN WE HELP YOU NEXT?

Gary Swedback - CEO NAI Mexico
gswedback@naimexico.com | +1 (619) 665 5391

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.

NEED ACCESS TO MORE INDUSTRIAL ANALYTICS

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



WHERE CAN WE HELP YOU NEXT?

Gary Swedback - CEO NAI Mexico
gswedback@naimexico.com | +1 (619) 665 5391