



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
- Agascalientes
- Lagos de Moreno

Central

- Mexico City
- Toluca
- Puebla



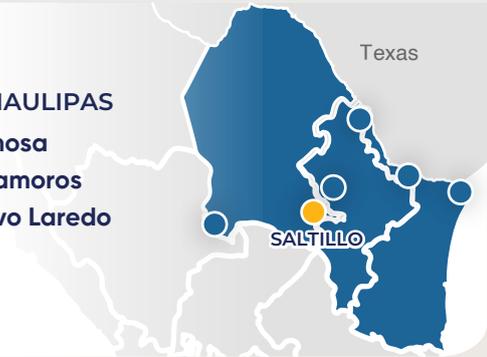
SALTILLO

NORTHEAST REGION

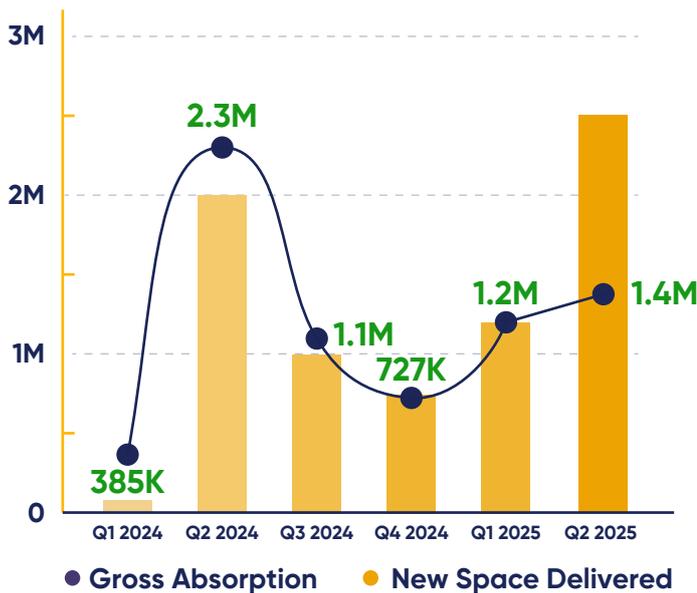
NUEVO LEON
Monterrey

COAHUILA
Saltillo
Torreón

TAMAULIPAS
Reynosa
Matamoros
Nuevo Laredo



HISTORIC DEMAND AND NEW SPACE DELIVERED (SF)



MARKET ACTIVITY

Gross Absorption: A total of 1.4M SF was absorbed, consisting of:

- 1.35M SF of newly delivered and occupied space.
- 50K SF of existing space occupied.

Availability: Increased to 2.28M SF, due to:

- 1.1M SF of available space delivered.
- 352K SF of vacated space.

MARKET LEVERAGE



As forecasted, given the delivery of speculative buildings, availability increased during the quarter. While owners still have more leverage in the market, due to high demand, this recent increase in vacancy has granted tenants some leverage, if only for a brief period.

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

	MARKET SIZE	AVAILABILITY	VACANCY	GROSS ABSORPTION	NET ABSORPTION	AVG. LEASE RATE (US\$/Mo)
CURRENT QTR	67.6M	2.3M	3.37%	1.4M		
PAST QTR	65.1M	792.6K	1.22%	1.2M		
CHANGE	▲2.5M	▲1.5M	▲2.15%	▲210.5K		

**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.

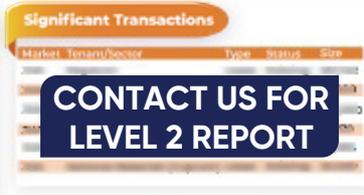
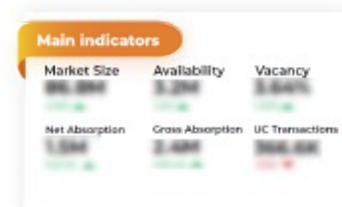
Avg. Lease Rate

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



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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**





Q2 BUSINESS INTELLIGENCE
2025 Industrial Market Trends

LEVEL 3 INDUSTRIAL POSITIONING MATRIX



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: 26,000,000 | Availability SF: 3,200,000 | Vacancy: 2.64%

Under Construction: UC Spec Bldgs, UC BTS Bldgs

Absorption

Existing SF Absorbed, Completed & Absorbed SF, Vacated SF, Completed & Available SF

Completions: Total SF, BTS SF, Expansions SF

TENANT ORIGIN EXPECTATION

- 35% 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.