



NAI Mexico

A.M.P.I.
**realty
summit**

TIJUANA CRECIENDO

**NUEVAS INVERSIONES
NUEVOS NEGOCIOS**

**“Realidades y expectativas del
Mercado industrial de Tijuana”**

Septiembre 6 , 2022 | Tijuana, Bc
12:30 p.m.

Agenda

NAIMexico

Agenda – El Mercado Industrial en Tijuana

- 1: Factores de Decisión Industrial
- 2: Mercado Industrial En Tijuana y su Éxito
- 3: Tendencias hacia el Futuro

A low-angle, upward-looking photograph of a complex industrial structure, possibly a refinery or chemical plant, featuring a dense network of steel beams, walkways, and pipes. The entire image is overlaid with a semi-transparent red color. The text 'Factores de Decisión Industrial' is centered in a white, serif font.

Factores de Decisión Industrial

NAIMexico

Algunos Factores de Decisión

1. Contenido USMCA y FTA

2. Gastos Operacionales

3. Logística- Supply Chain

Tratados de Comercio – Free Trade Agreements



Contenido USMCA y FTAs

1. Traer proveedores a Mexico para cumplir con USMCA “rules of origen”
2. Aprovechar contenido y FTAs para exportar a LATAM (Eje. Automotriz)
3. Chips Act - Semiconductoras + Litio
4. Estímulo para atraer proveedores de Asia, EEU/CAN y Europa

Gastos Operacionales - Sueldos

Analisis Comparacion Nomina Anual				
Puesto	#Employees	MX	EEUU	Diferencia MX
Assembly Line Workers	96	\$ 649,728	\$ 3,197,376	\$ 2,547,648
Production Supervisors	3	\$ 68,904	\$ 202,017	\$ 133,113
Plant Managers	1	\$ 125,664	\$ 188,345	\$ 62,681
Grand Total	100	\$ 844,296	\$ 3,587,738	\$ 2,743,442

Contrato de arrendamiento 5 años - **Ahorro: \$13.7M USD**

Logística y Supply Chain

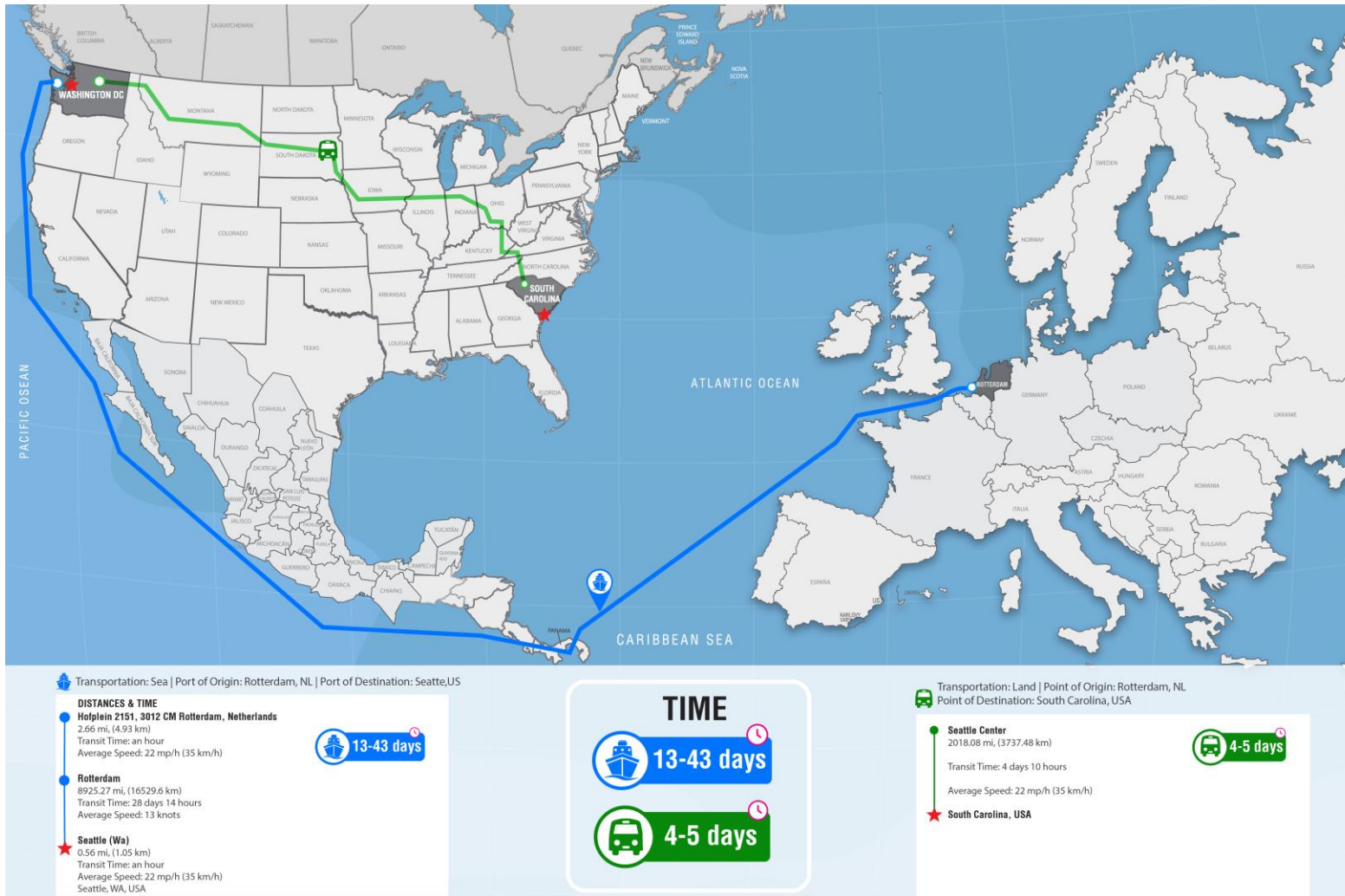
Caso Real:

1: Materia Prima de Europa a Seattle WA por medio Canal de Panamá

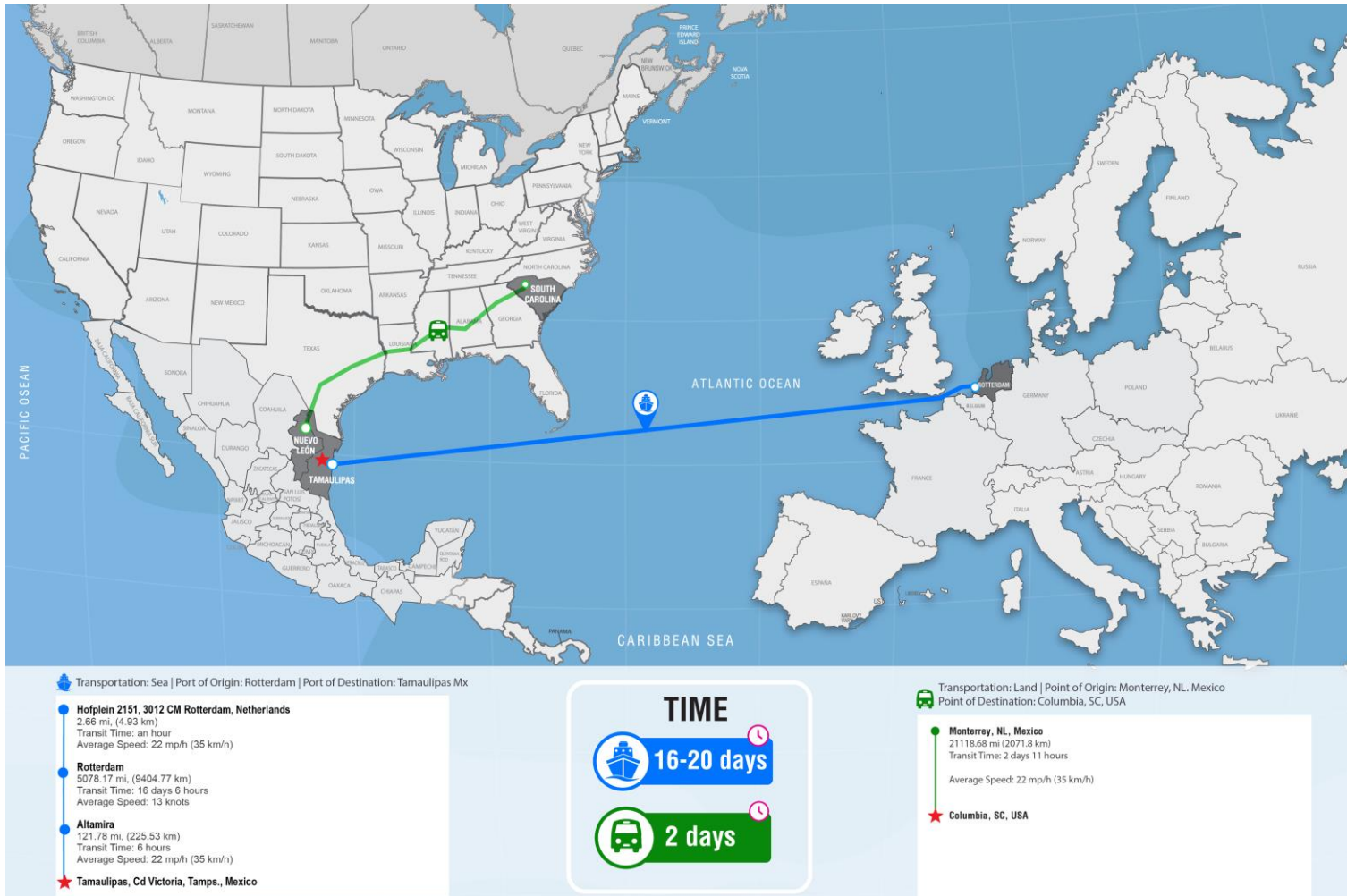
2: Producto semiterminado de Seattle a Columbus, SC

Objetivo

Ser más competitivo en costo/precio y tiempos



Logística y Supply Chain



Caso Real - Análisis Mexico

1. Materia prima a Houston o Tam.
2. Producción en MTY
3. Bodega en TX
4. MTY/TX a SC

Ahorro de aprox.:

15 días barco

2 días en camion

A low-angle photograph of a complex industrial facility, likely a refinery or chemical plant, with numerous tall distillation columns, pipes, and scaffolding. The image is overlaid with a semi-transparent red filter. The text is centered over the image.

Mercado Industrial en Tijuana y su Éxito

NAIM Mexico

RED NACIONAL Y COBERTURA

Business Intelligence monitorea en Mexico:

- 24 principales mercados industriales.
- 100 Millones de metros cuadrados de espacio industrial.
- +10,000 propiedades industriales.

30 años de liderazgo de mercado en México proporciona la experiencia para manejar diversos tipos de Proyectos Industriales en todos los sectores principales.

Proporcionar información fiable para apoyar el proceso de toma de decisiones a través de nuestros conocimientos locales y nacionales.

Servicios complementarios de valor añadido como:

- Multi-Market Analyses.
- Total Cost of Operations.
- Business Intelligence.
- La red de socios de NAI México permite el acceso a servicios de apoyo para proyectos industriales.



COBERTURA NAI MEXICO

NAI Interactive Industrial Dashboard

NAIMexico

Q1 BUSINESS INTELLIGENCE 2023 Industrial Market Trends

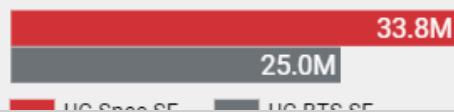
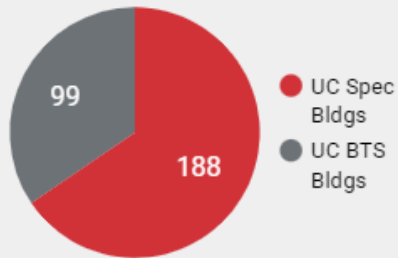
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Main Indicators

Market Size SF: 1.22B ↑ 10.4M
 Availability SF: 19.8M ↓ -2.1M
 Vacancy: 1.62% ↓ -0.18%

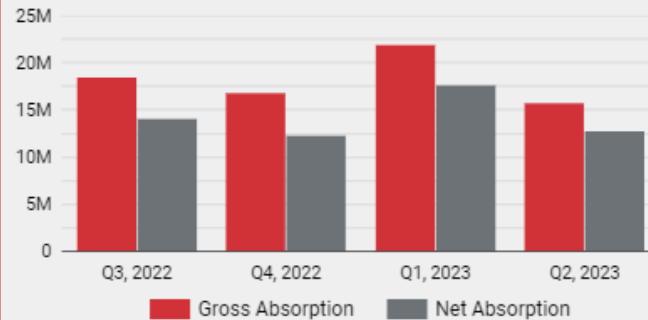


Under Construction



Absorption

Existing SF Absorbed: 6.9M ↓ -1.0M
 Completed & Absorbed SF: 8.8M ↓ -5.1M
 Vacated SF: 1.4M ↓ -1.3M
 Completed & Available SF: 1.4M ↓ -177.8K



Completions

Total		BTS		Expansions	
SF	Bldgs	SF	Bldgs	SF	Bldgs
10.4M	57	4.2M	20	1.3M	5
Total Spec		Available Spec		Absorbed Spec	
SF	Bldgs	SF	Bldgs	SF	Bldgs
4.9M	37	1.4M	14	3.5M	27

UC Transactions

10M

Select your Market

Region State Market

Building Indicators

Total Buildings: 10,603 ↑ 57
 Total Available Buildings: 312 ↓ -8
 Buildings Occupied in Q: 143 ↓ -40

Available <100K SF	247
Available >100K SF	65

Leased & Occupied	97
Delivered & Occupied	46

Registered Transactions

MKT	Tenant/Sector	Type	Status	Size
MTY	Developer	Sale	Land	759,932
MXL	Oh Sung	Sale	Land	645,835
GTO	Suminoe	Lease	BTS UC	538,196
CDMX	Logistics	Lease	Spec UC	509,595

Tijuana Market Trends

Main indicators

Market Size
86.7M
1.1M ▲

Availability
514K
64.6K ▲

Vacancy
0.59%
0.07% ▲

Net Absorption
1.1M
511.3K ▲

Gross Absorption
1.2M
568K ▲

UC Transactions
704.5K
-21.6K ▼

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



Availability — Avg. Lease Rate

Building Indicators

Number of Buildings
1,039
5 ▲

#Available Buildings
9
2 ▲

#Buildings Occupied in Q
8
1 ▲

Delivered BTS
0
0

Under 100K
8
2 ▲

Leased & Occupied
3
3 ▲

Delivered Spec
5
-2 ▼

Over 100K
1
0

Delivered & Occupied
5
-2 ▼

Under Construction

SF Under Construction
2.8M
-119.6K ▼

Spec **1.3M** -717.9K ▼
BTS **1.4M** 598.3K ▲

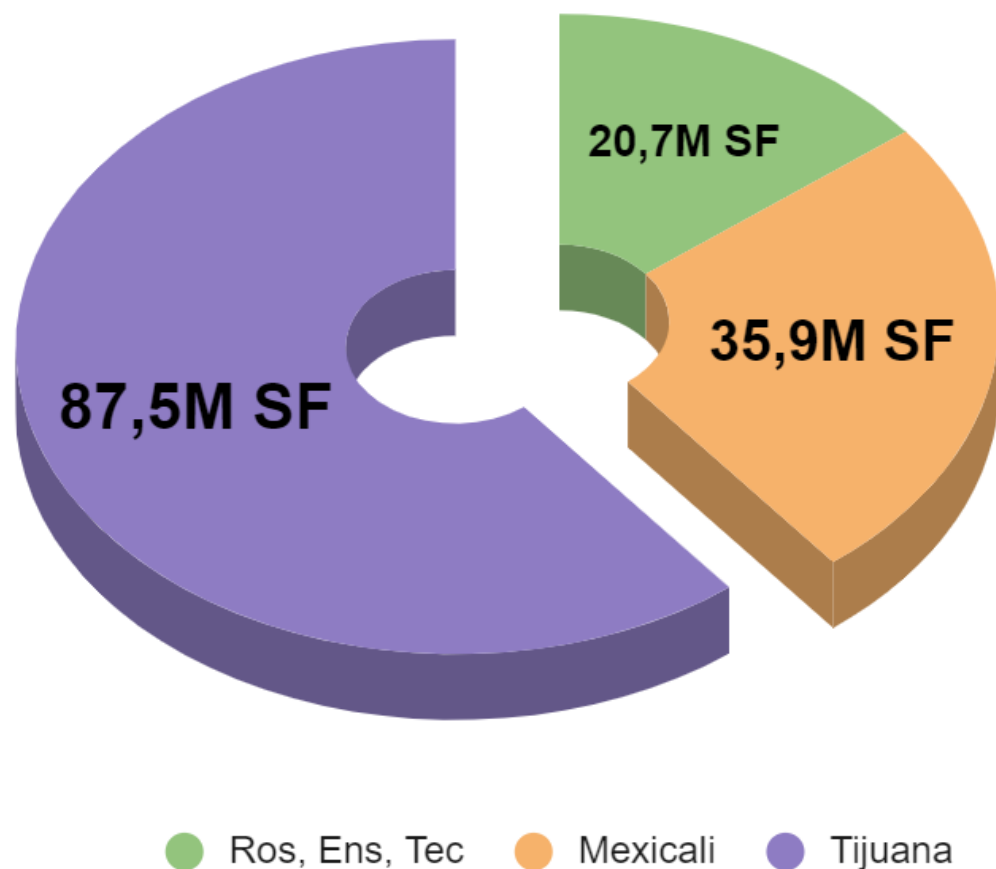
#Bldgs Under Construction
22
2 ▲

Spec **15** -1 ▼
BTS **7** 3 ▲

- Tijuana's vacancy at the end of Q1 2023 was 0.59%, representing only 514K SF of industrial space (9 buildings).
- Gross absorption was 1.18M SF, consisting of:
 - 1.06M SF (5 facilities) of delivered and occupied Spec.
 - 85K SF (1 facility) previously in LOI was leased.
 - 37K SF (2 facilities) was vacated and leased.
- There is 2.76M SF of space currently under construction, of which 939K SF started during the quarter.
- To attend the high demand, 4.7M SF of industrial space is being planned for the next quarters.
- Industrial growth is taking place mainly in the east towards Tecate and in the southwest towards Rosarito, given the availability of land in those parts of the city.

Mercado Industrial Baja California

- Baja California: 144.2M SF

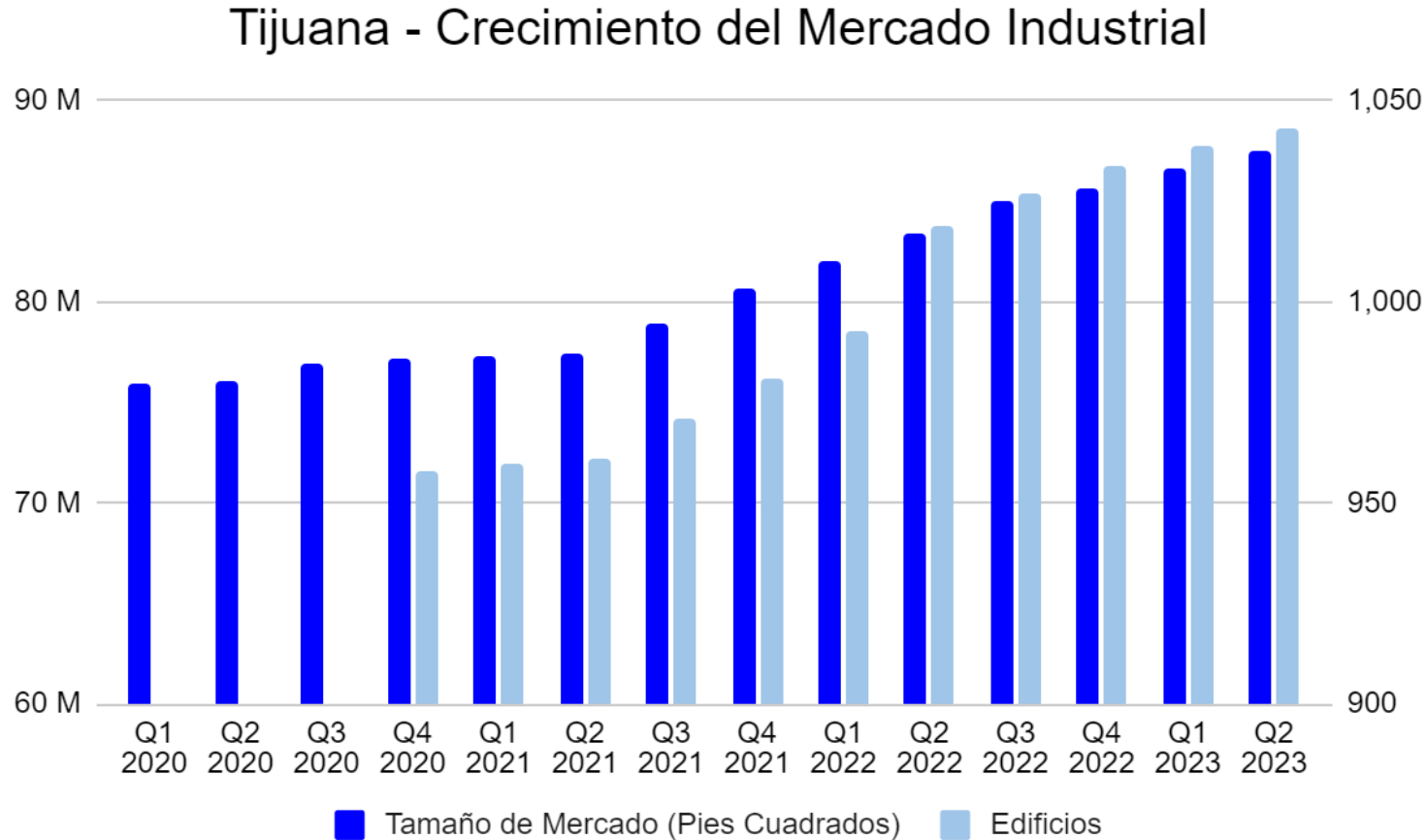


Mercados Industriales Principales

Monterrey	154.5M SF
Mexico City*	144.3M SF
Tijuana	87.5M SF
Guanajuato	82.2M SF
Ciudad Juarez	81.3M SF
Toluca	73.0M SF
Queretaro	67.9M SF
Aguascalientes	60.4M SF
Puebla	58.4M SF
Saltillo	56.8M SF

*No contando Toluca

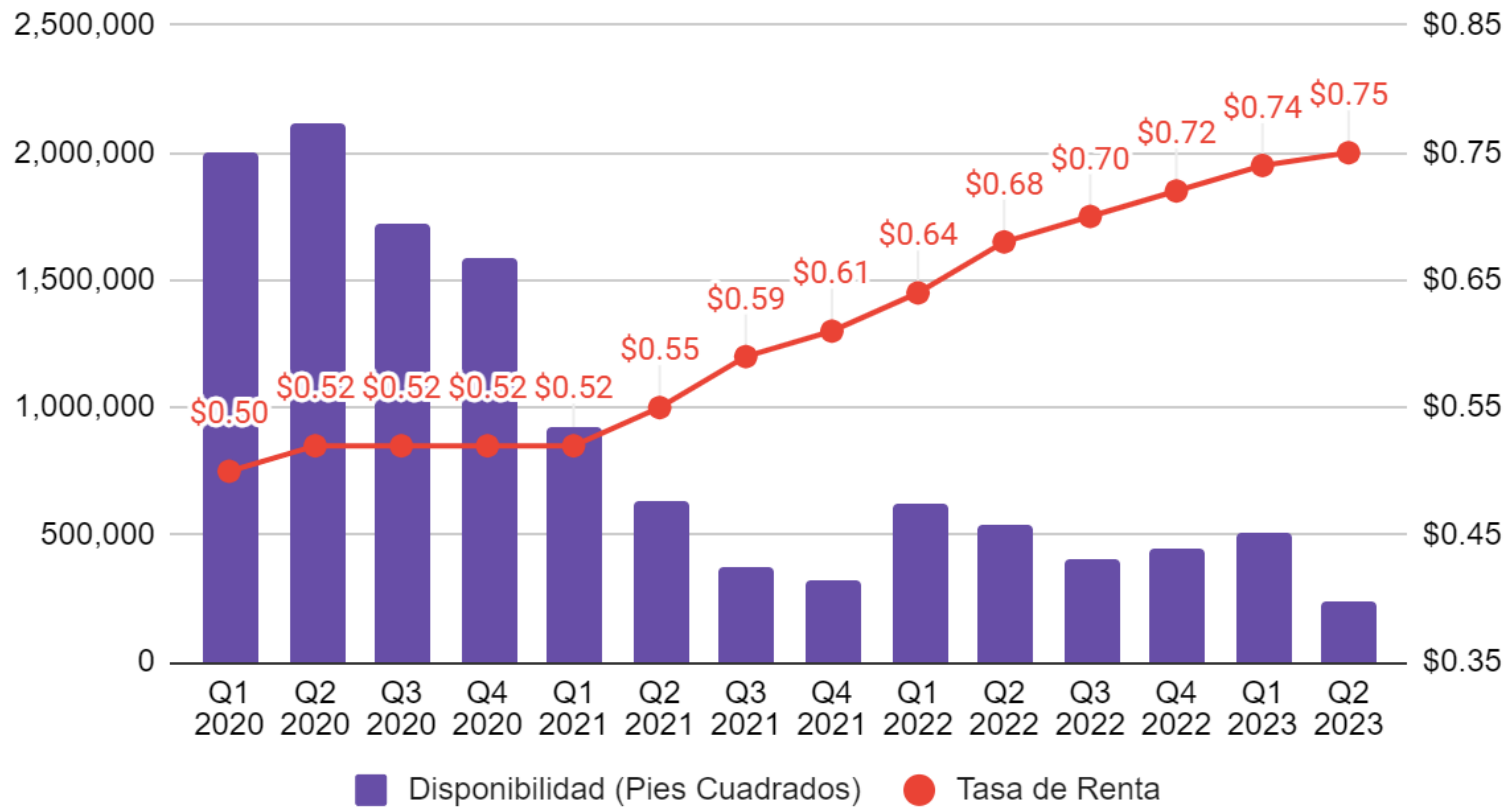
Mercado Industrial Tijuana



- SF 85,5M2
 - Crecimiento de 11.5M SF desde Ene. 2020
- 1,043 Edificios
 - Crecimiento de 85 Edificios
- Promedio de nave: 84,000 SF
- Sectores principales
 - Aeroespacial
 - Automotriz
 - Electrónica
 - Dispositivos Médicos

Disponibilidad v Lease Rate

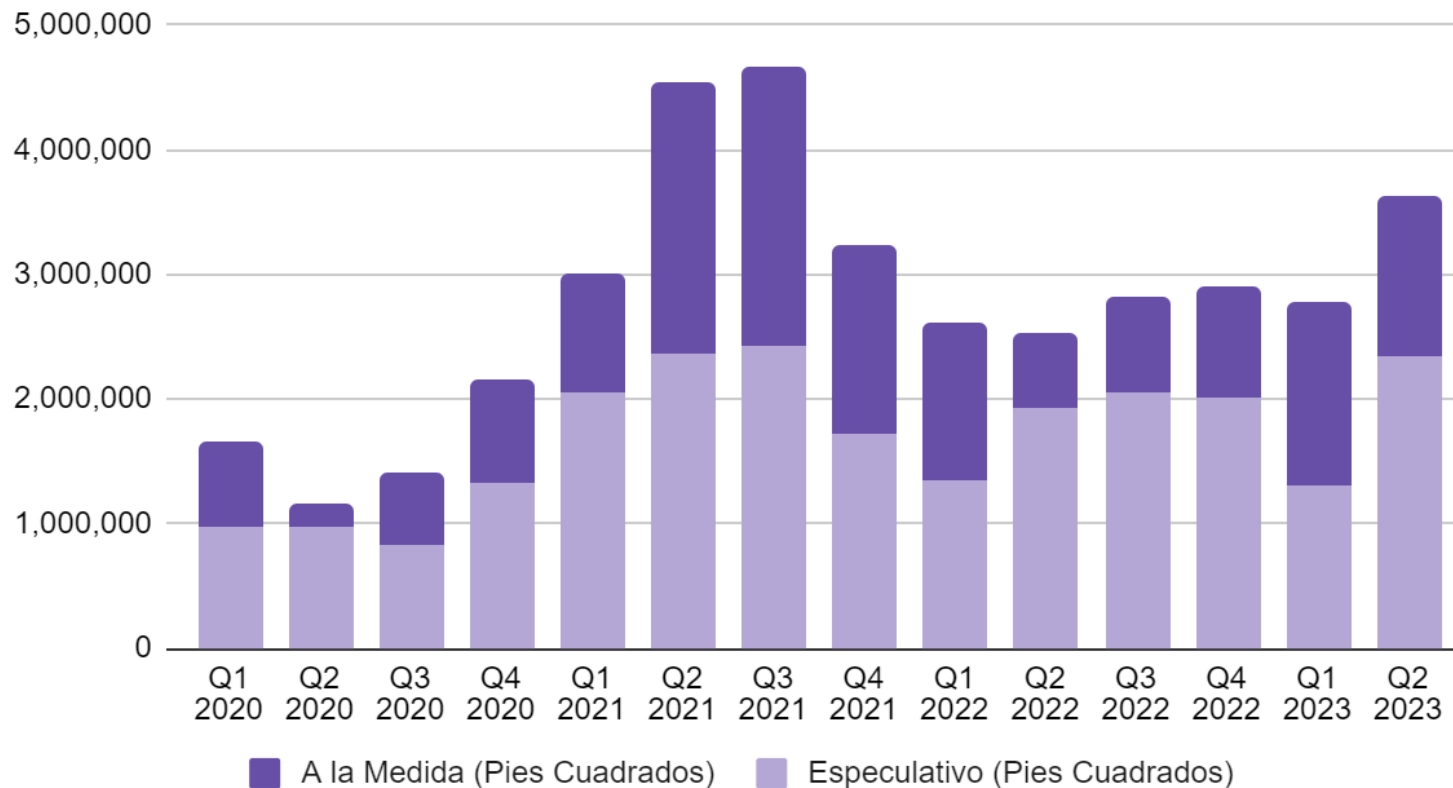
Tijuana - Disponibilidad y Renta



- 0.28% Disponible
 - 240K SF de Espacio
- Poder hacia Propietarios / Desarrolladores desde Q2 2021 (saliendo Covid)
- Lease Rate (asking) \$0.75 por SF/Mes.
- Hay lease Rates arriba de \$1

En Construcción

Tijuana - Construcción de Espacios Industriales

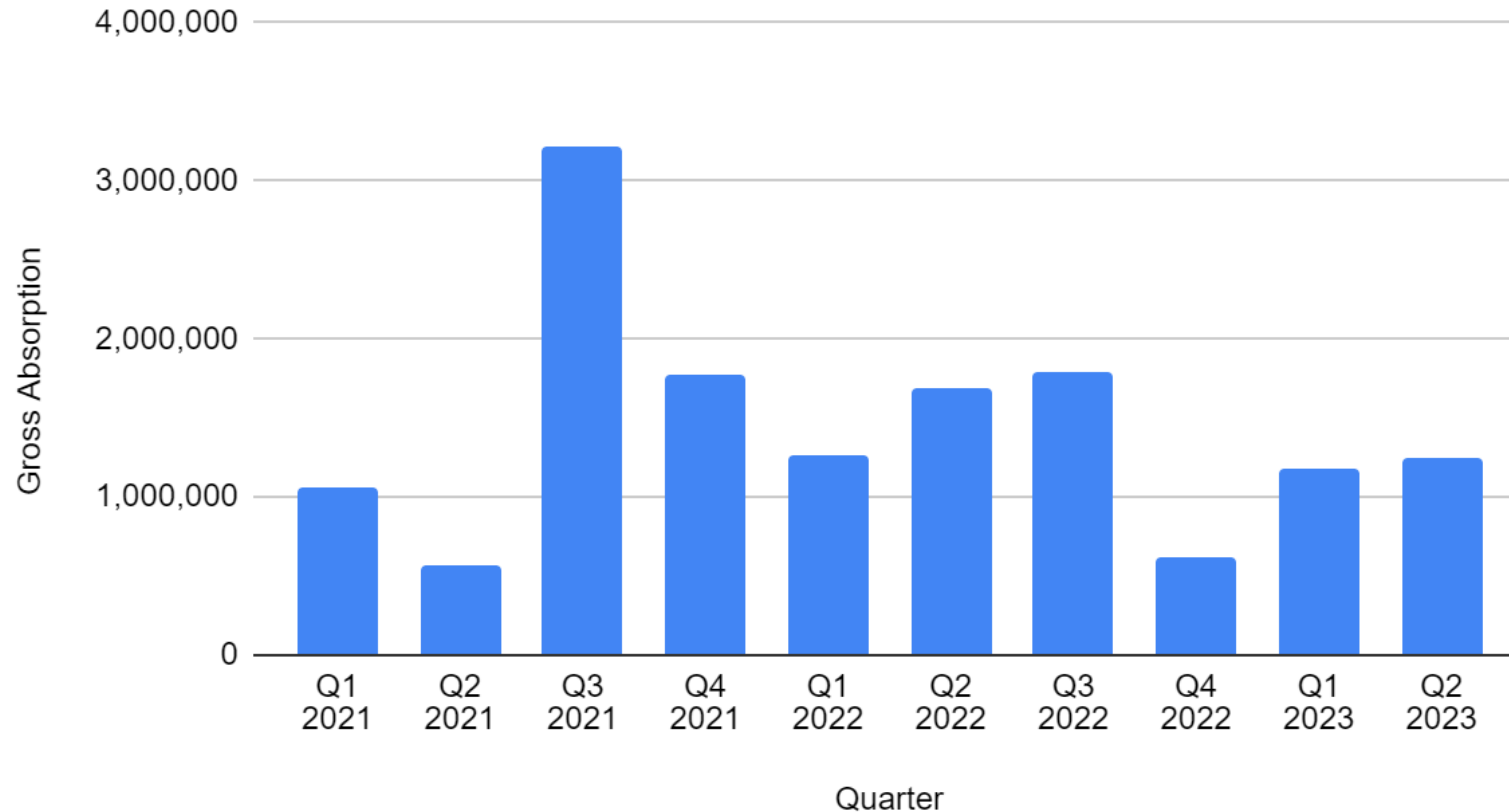


Construcción:

- Continua Desarrollo de naves industriales
- Muchas naves especulativas están pre rentadas durante Construcción

Absorción

Absorción Tijuana



Absorción

- Ocupación de naves existentes
- Total de 14.4M SF ocupada desde Ene. 2020
- Promedio de 1.4M SF por trimestre

Consecuencias del Éxito

1. Falta de terrenos en zonas industriales
2. Precio de tierra y renta subiendo
3. Demanda de KVAs supera la oferta
4. Competencia por la fuerza laboral
5. Mercado alternas se ponen atractivos

A photograph of three business professionals in a meeting, overlaid with a semi-transparent red filter. They are gathered around a table, looking at documents and a tablet. One document features a bar chart and a line graph. The overall scene conveys a professional and collaborative atmosphere.

Tendencias del Mercado Industrial

NAIMMexico



¡Gracias!

Harold Hoekstra COO, NAI Mexico

(664) 971 03 33

(664) 204 66 26

hhoekstra@naimexico.com

NAI Mexico