



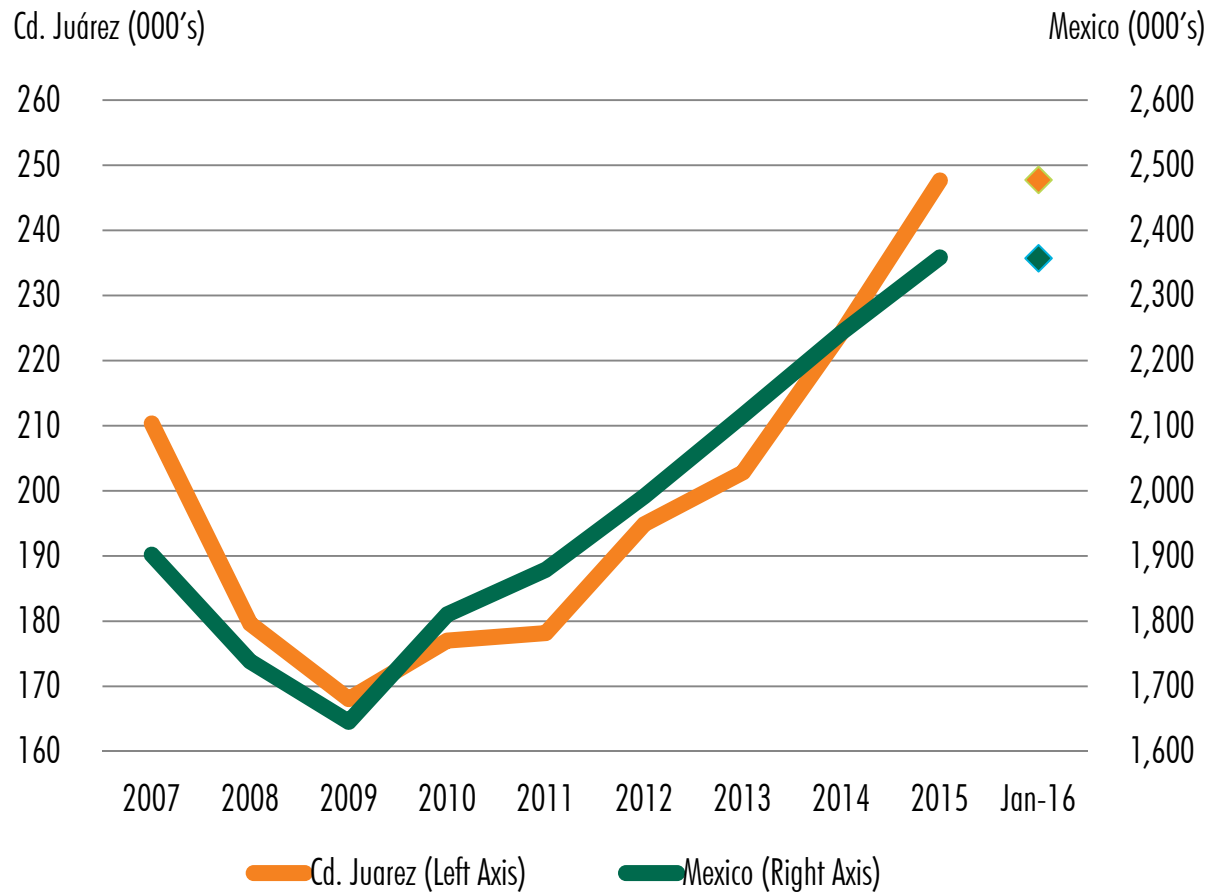
CD. JUÁREZ

INDUSTRIAL ANALYSIS

Prepared for: MVEDA Business in the Borderplex Forum
All information is confidential.

EMPLOYMENT

CD. JUAREZ MAQUILADORA EMPLOYMENT (IMMEX MFG)



Cd. Juárez IMMEX:

60% of Employment in Cd. Juárez

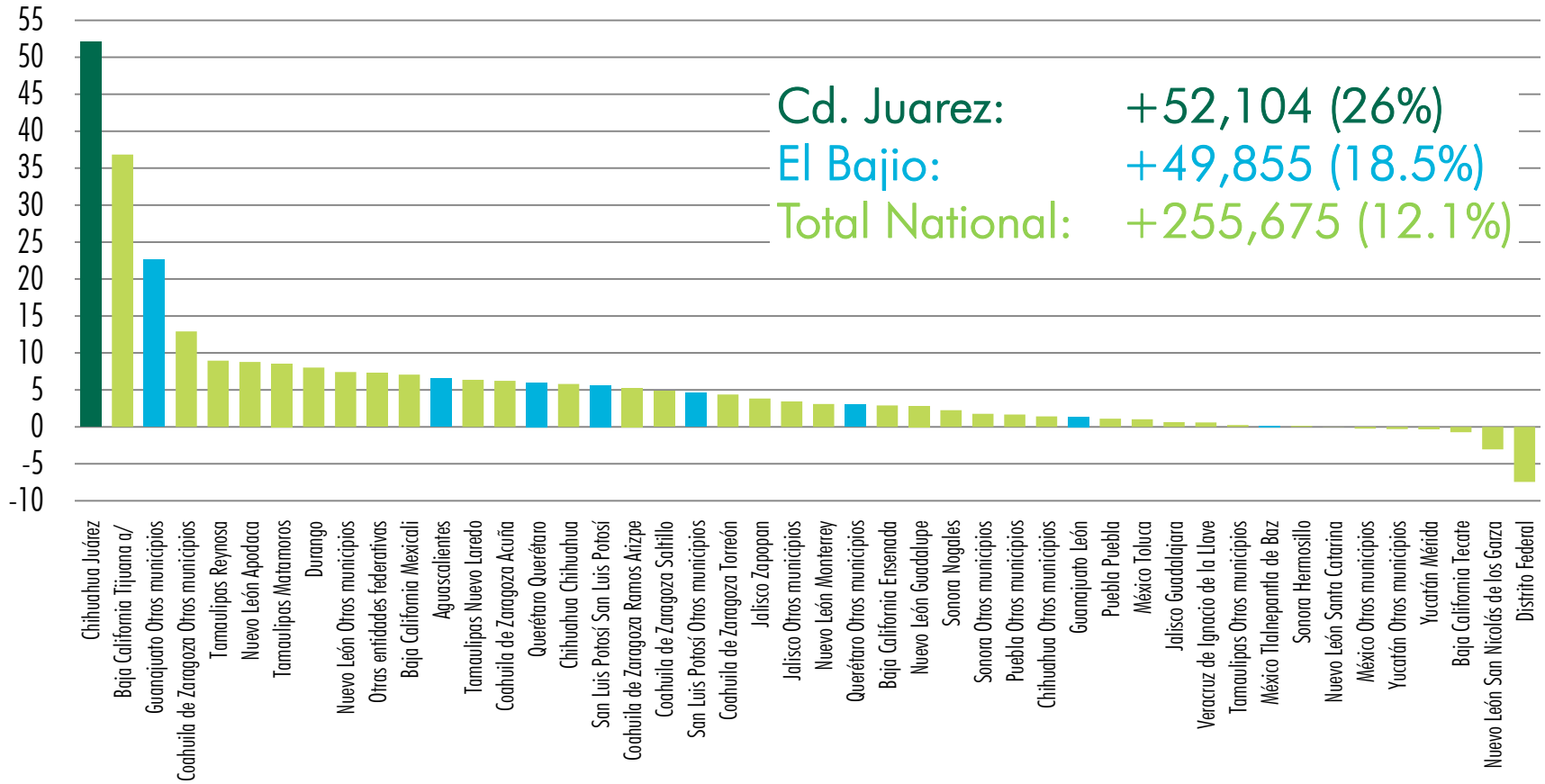
11% of All IMMEX Employment
in Mexico

Source: INEGI, March 2016.

EMPLOYMENT

IMMEX MFG JOBS ADDED - JANUARY '14 TO OCTOBER '15

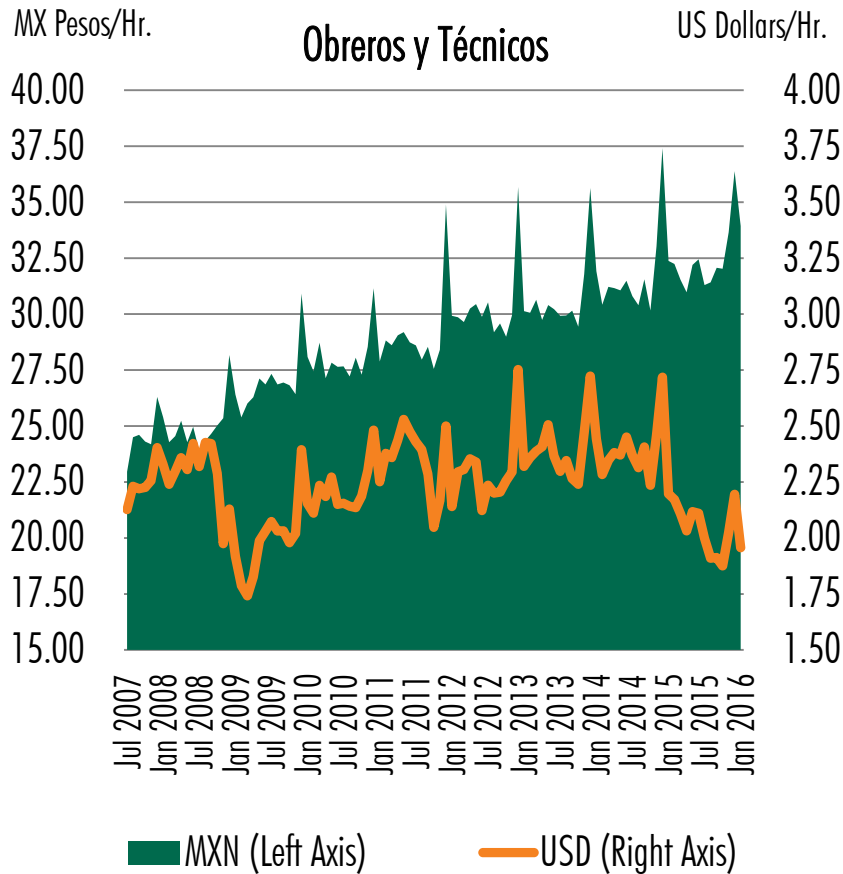
(000's of Jobs)



Source: INEGI, January 2016.

RELEVANT INDICATORS

CD. JUAREZ MFG WAGES, NOMINAL, N.S.A.



	Current (Jan 2016)	Y-o-Y Change (%)
Juarez Wage, MXN	33.94	4.8
Juarez Wage, USD	1.96	(10.9)
Mexico Wage, USD	2.10	(16.0)
Exchange Rate (MXN/USD)	17.3	17.7 (15.0)
Production Wage El Paso, USD	13.54	

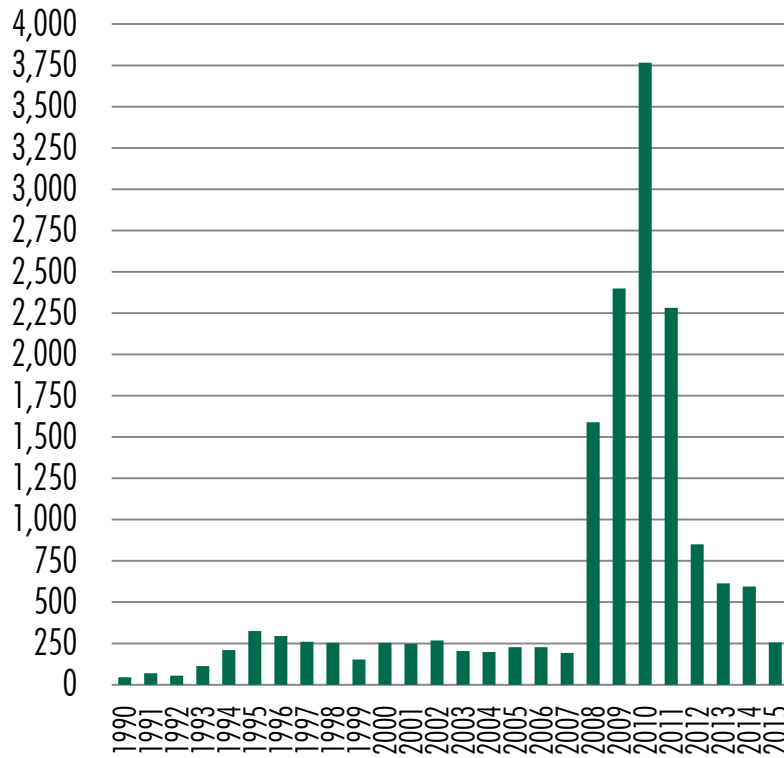
	Cd. Juarez	Demographics
Population	1.462 MM	
Median Age	25 yrs.	
Age 15 and Above	677 K	47%
Of that Employed	403 K	60%

Source: INEGI, Banco de Mexico, CBRE Research, May 2016. Wages include vacations, bonuses and incentives. Wages exclude transportation and meals. BLS May 2015.

SECURITY

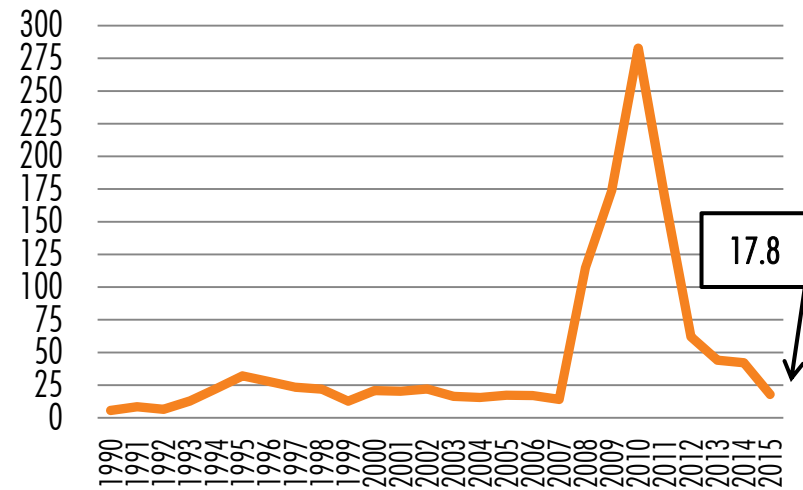
CD. JUAREZ HOMICIDE FIGURES

Deaths by Homicide



Deaths by homicide fell to 2007 levels in 2015, in line with the historical average.

Homicide Rate (per 100,000)



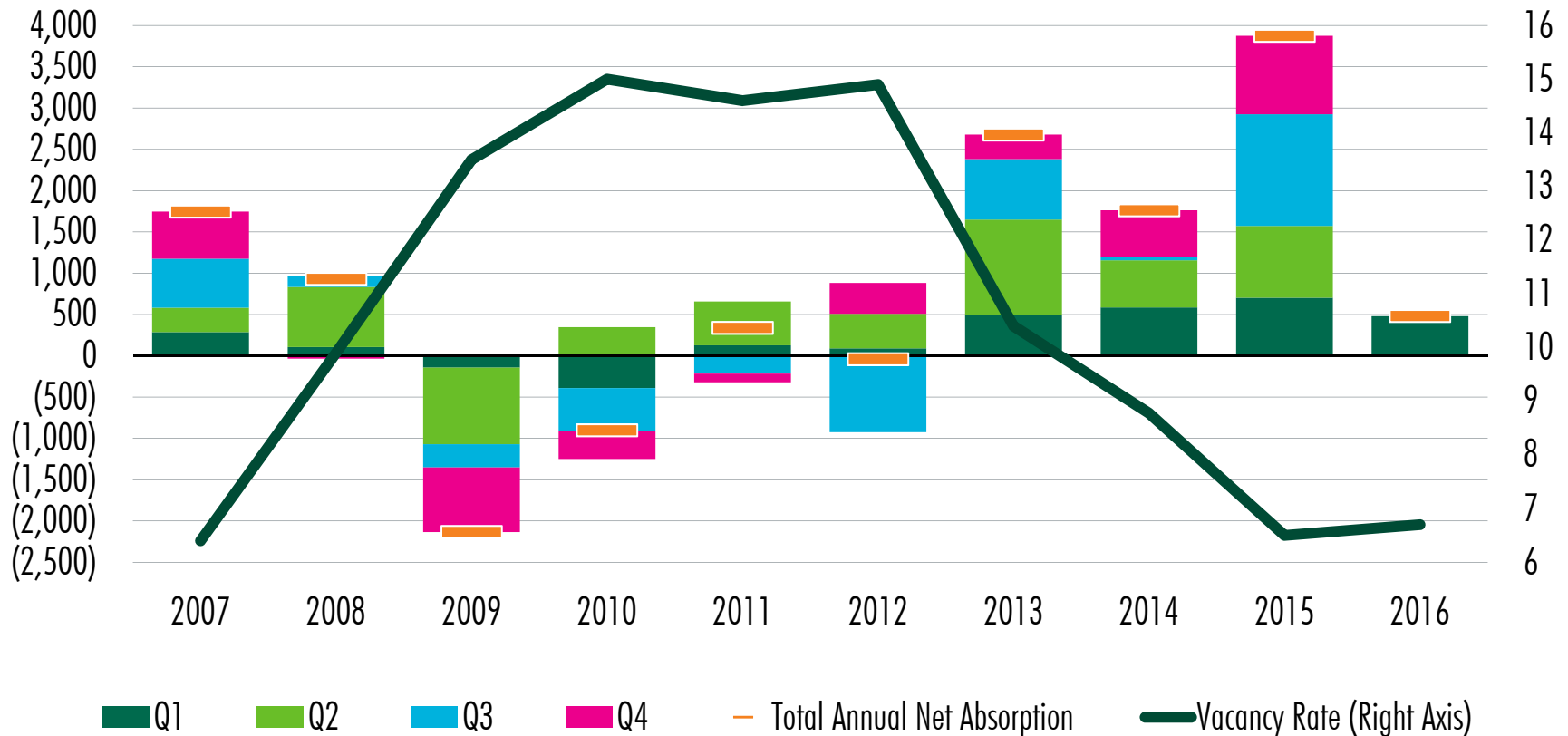
Source: INEGI, UTEP Border Region Modeling Project, CBRE Research, May 2016.

ABSORPTION AND VACANCY

CD. JUAREZ INDUSTRIAL

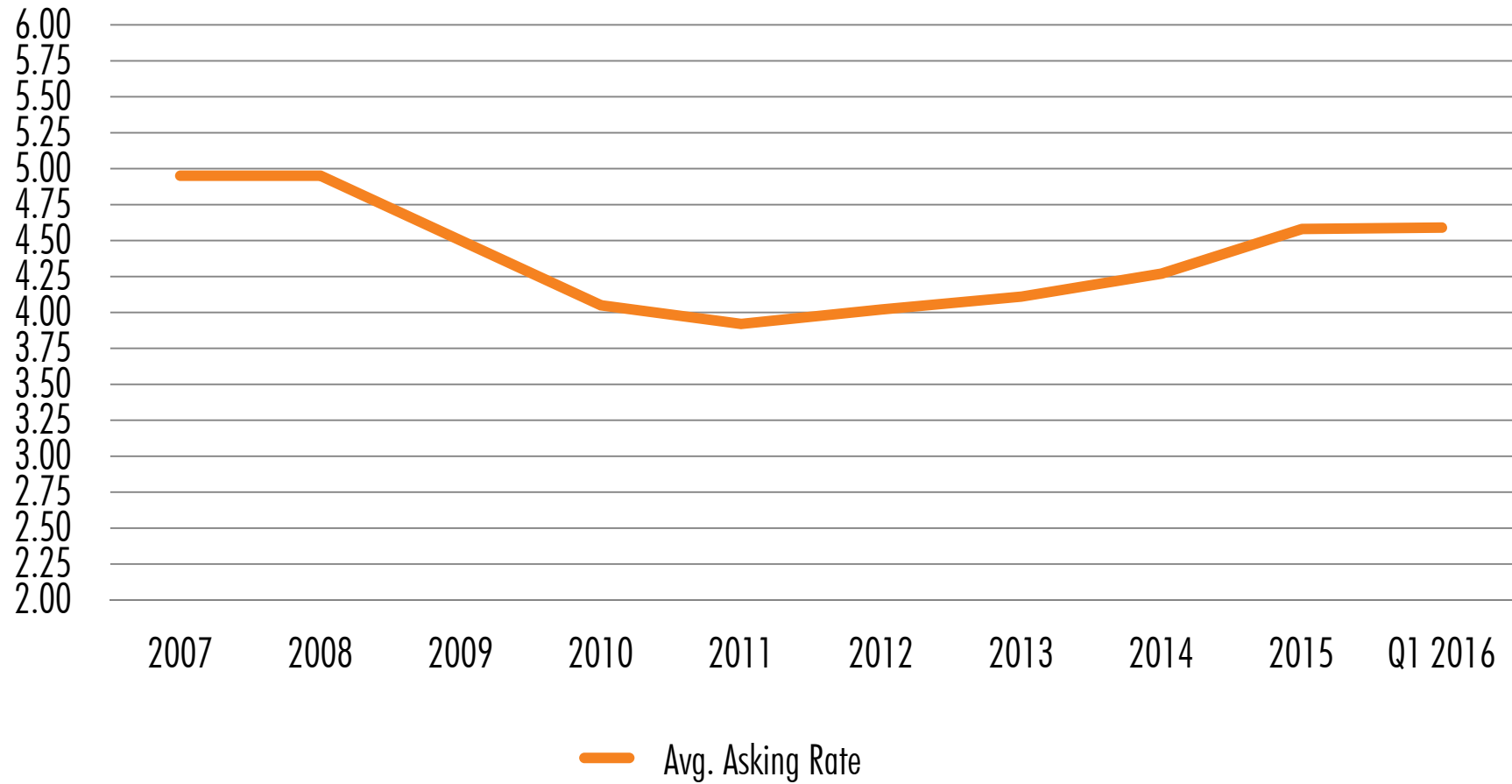
Net Absorption (000's SF)

Vacancy Rate (%)



LEASE RATES

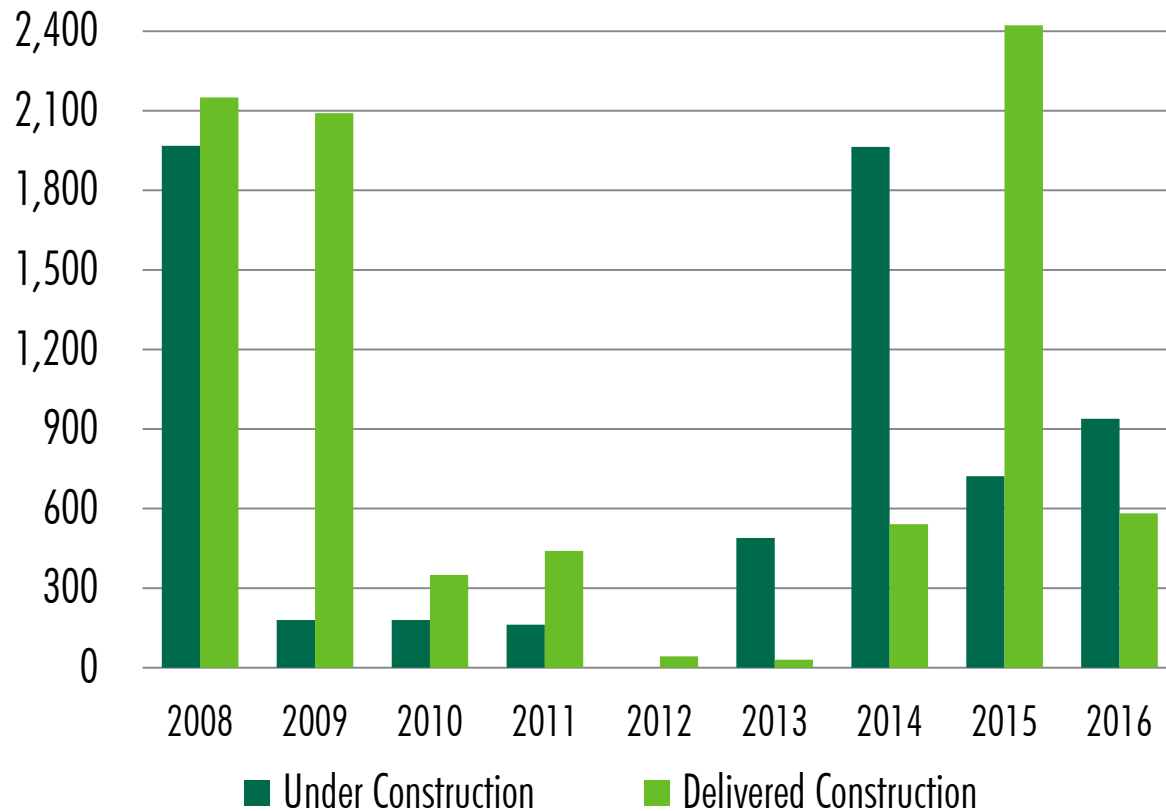
ASKING RATES VS. Y 1 AVG. – Class A & B



CONSTRUCTION

UNDER CONSTRUCTION AND DELIVERED

(000's SF)



Current Construction

Expected Occupancy: 64%

Vacant Delivery Impact :

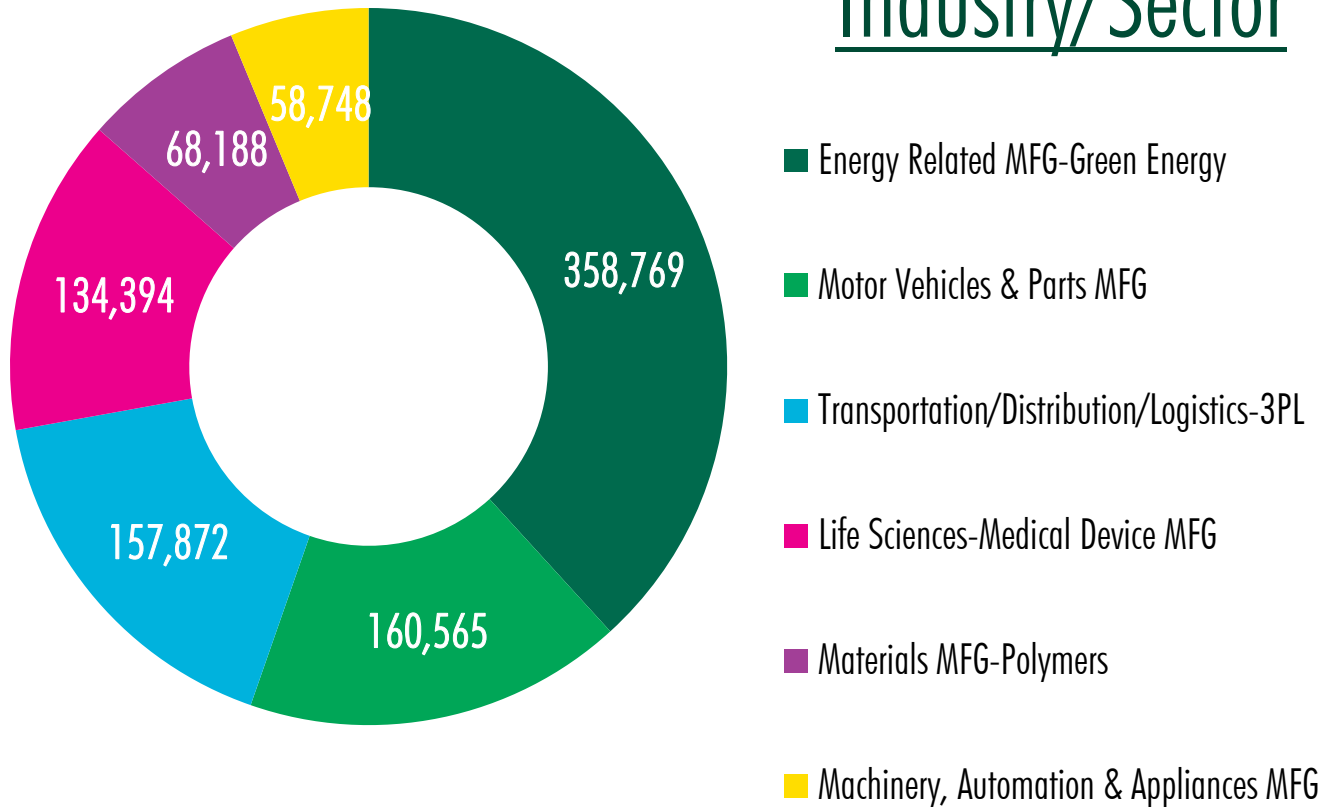
7.2% (+50bps)

RECENT TRENDS

ACTIVITY BY INDUSTRY – SF 2016 YTD (940 KSF)

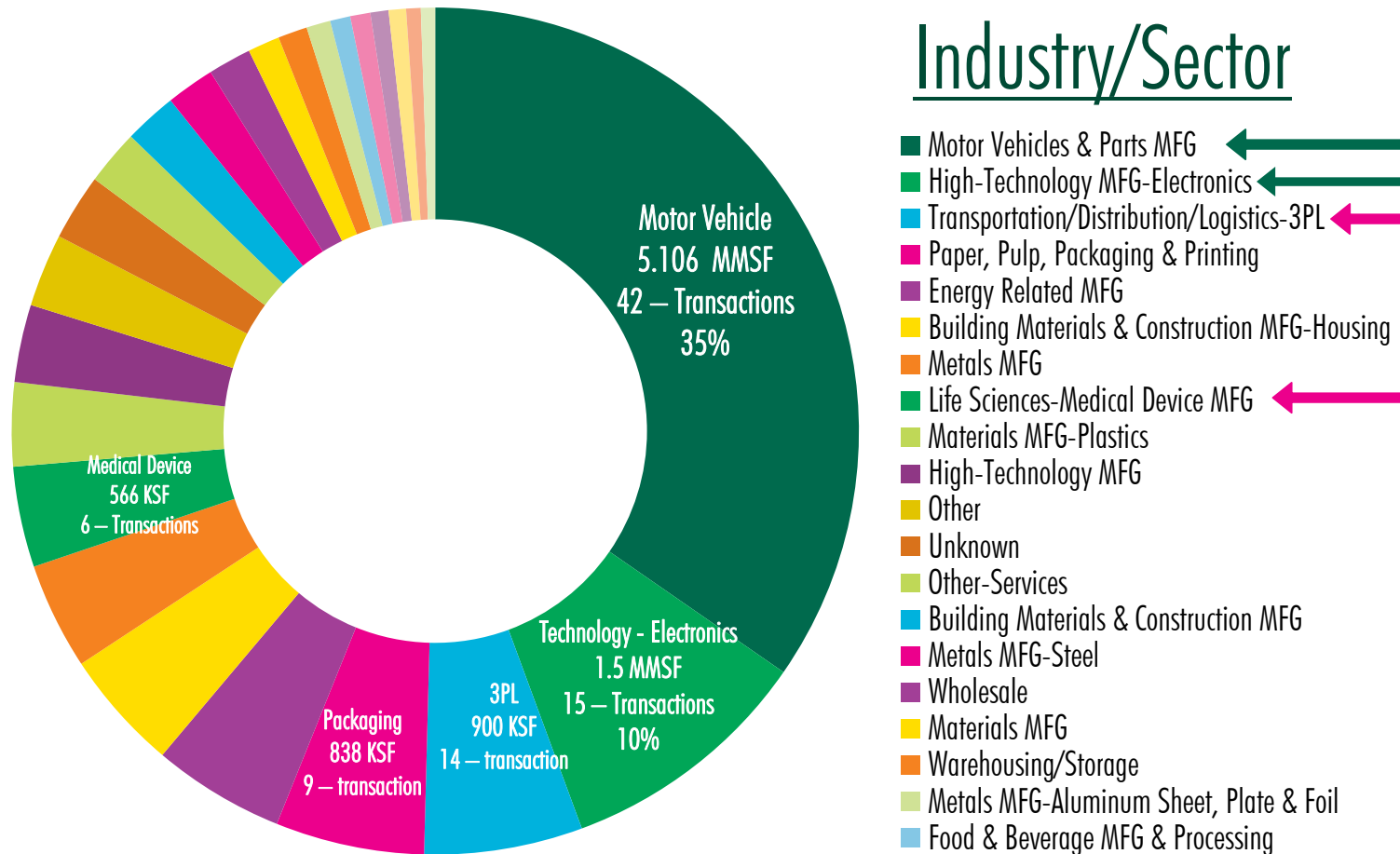
SF

Industry/Sector



RECENT TRENDS – 3 YEARS OF ACTIVITY

ACTIVITY BY INDUSTRY – 2012 – 2014 (14.9 MMSF)





REGIONAL OPPORTUNITIES

REGIONAL OPPORTUNITIES

AEROSPACE HUB



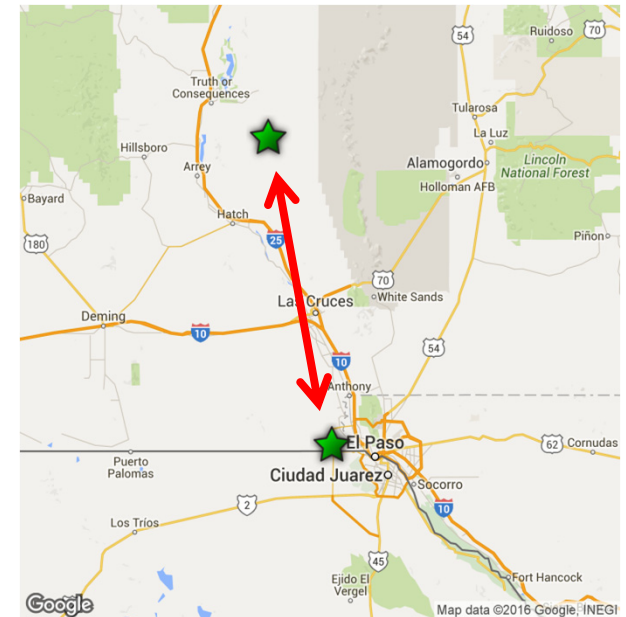
Source: Geo-Mexico.com

REGIONAL OPPORTUNITIES

SPACEPORT AMERICA



80 Miles from
Jeronimo/Santa Teresa

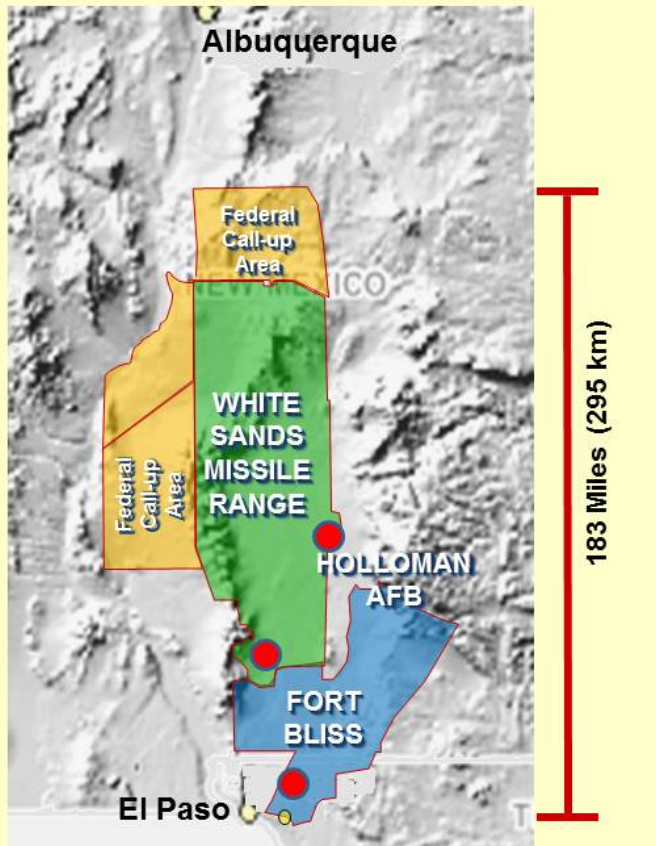


Source: Spaceport America Conceptual Images URS/Foster + Partners

REGIONAL OPPORTUNITIES

DEFENSE INDUSTRY

Regional Military Complex



Source: Borderplex Alliance, Target Industries

- Largest DoD-Controlled air & ground space in the U.S.
- Slightly smaller than Connecticut – 7,105 sq. ft.
- USAF air traffic control from “mud to space”
- Joint, interagency, & multinational test and maneuver environment



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