

MARKET TRENDS

DALLAS/ FORT WORTH *INDUSTRIAL*



SIGNIFICANT LEASE TRANSACTIONS 2Q 2026

Property	Submarket	SF	Transaction Type	Tenant
Passport Park West 6	DFW Airport	1,075,544	New Lease	Amazon
114 Logistics Park	North Ft Worth	1,004,400	New Lease	Novolex
Forney Logistics Crossing	East Dallas	904,495	New Lease	RJW Logistics Group
2101 FM 1173	Northwest Dallas	702,766	New Lease	Western Partitions
Alto Pinto 45	South Dallas	586,889	New Lease	DHL

SIGNIFICANT DEVELOPMENT PROJECTS

Property	Submarket	SF	Status	Delivery Date
12100 S Freeway Service Rd	South Ft Worth	1,051,346	Warehouse/Distribution	May 2026
Intermodal Logistics Center	North Ft Worth	703,085	Warehouse/Distribution	May 2026
West Worth Commerce Center	South Ft Worth	387,400	Warehouse/Distribution	June 2026
Saginaw Distribution Center	North Ft Worth	321,193	Warehouse/Distribution	April 2026
Constellation Rock Island Logistics Center	Great SW/Arlington	286,700	Warehouse/Distribution	May 2026

MARKET BREAKDOWN

	2Q26	1Q26	2Q25	YOY Change
Total Vacancy Rate	8.8%	8.9%	9.5%	-70 bps
Availability Rate	11.6%	11.4%	11.5%	10 bps
Direct NNN Asking Rents/SF/Yr	\$9.34	\$9.20	\$9.11	2.6%
Under Construction (SF)	35,850,181	33,293,175	29,147,430	23.0%
	2Q26	2026 YTD	2025 YTD	YOY Change
Leased SF	24,073,546	46,480,412	34,965,260	32.9%
Total Net Absorption (SF)	5,660,631	16,206,584	13,936,985	16.3%
Construction Deliveries (SF)	4,902,852	11,117,949	9,171,358	21.2%
Sold SF	18,530,099	30,554,598	30,870,681	-1.0%

SUBMARKET STATISTICS

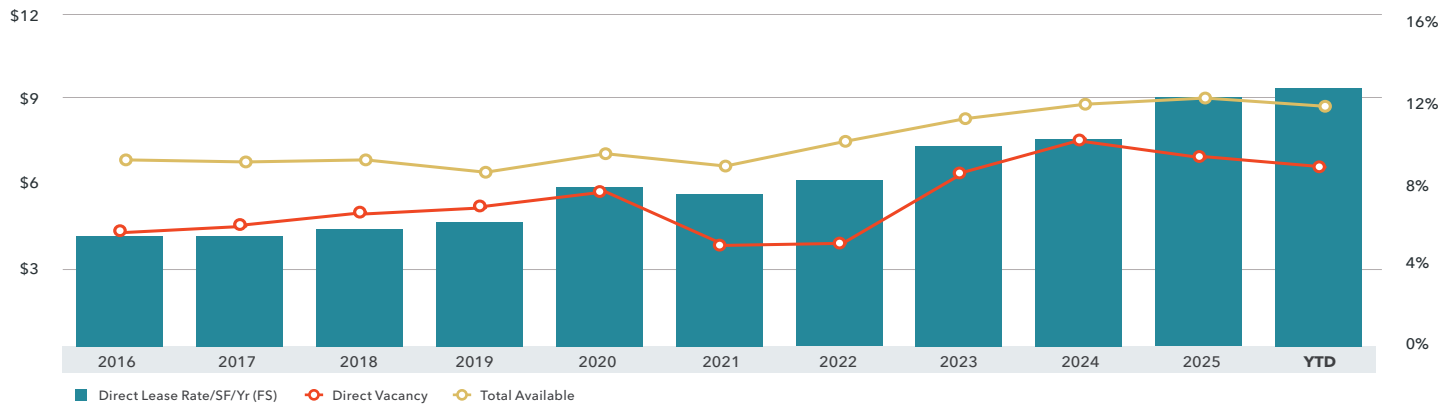
Submarket	Total Inventory	2Q26 Deliveries	Under Construction	Total Vacancy Rate	Total Availability Rate	2Q26 Total Net Absorption	YTD Total Net Absorption	2Q26 Leasing Activity	YTD Leasing Activity	Direct NNN Asking Rents
DFW Airport	99,663,073	0	2,592,338	9.5%	10.3%	1,596,330	2,167,884	2,587,551	5,563,795	\$11.66
East Dallas	71,383,027	375,833	1,909,916	10.9%	11.1%	36,620	3,379,904	2,045,508	5,625,227	\$10.25
Great SW/Arlington	128,665,408	782,574	2,188,956	7.8%	11.3%	1,331,242	1,102,945	2,660,550	4,437,729	\$8.47
North Ft Worth	149,194,484	1,044,278	10,589,424	7.9%	14.8%	826,937	4,233,713	4,320,060	7,629,889	\$8.50
Northeast Dallas	122,657,816	359,918	4,821,300	7.2%	11.0%	1,252,480	1,711,187	2,417,063	4,905,235	\$11.53
Northwest Dallas	134,770,964	463,085	3,242,311	11.3%	13.5%	598,776	1,158,162	2,309,682	4,760,264	\$11.37
South Dallas	159,529,299	93,034	3,846,777	7.0%	8.3%	572,490	3,939,350	4,250,421	7,197,197	\$5.84
South Ft Worth	113,347,713	1,784,130	6,191,914	10.1%	13.2%	-721,689	-812,113	2,143,830	2,857,389	\$8.33
South Stemmons	116,524,982	0	467,245	8.9%	10.6%	167,445	-674,448	1,338,881	3,503,687	\$9.96
Dallas Forth/Worth Totals	1,095,736,766	4,902,852	35,850,181	8.8%	11.6%	5,660,631	16,206,584	24,073,546	46,480,412	\$9.34
Warehouse/Distribution	859,109,632	4,746,594	29,755,427	9.6%	12.8%	4,878,402	15,759,679	21,557,729	42,096,353	\$9.25
Manufacturing	110,237,471	0	259,000	3.1%	3.5%	928,184	842,569	699,511	1,281,170	\$7.07
R&D/Flex	91,525,229	69,338	1,111,406	6.8%	7.9%	-381,974	-621,834	927,805	1,833,282	\$12.83
Other Industrial	34,864,434	86,920	4,724,348	10.2%	17.9%	236,019	226,170	888,501	1,269,607	\$12.97
Under 50,000 SF	198,046,141	482,015	1,430,782	7.3%	8.2%	121,278	-796,676	2,343,532	4,827,208	\$12.34
50,000 SF - 100,000 SF	133,045,703	670,212	3,176,824	8.9%	12.3%	123,676	-144,296	1,908,016	3,258,849	\$10.67
100,000 SF - 250,000 SF	246,118,140	1,105,744	11,887,393	11.3%	15.9%	2,545,818	3,353,579	4,372,350	9,472,893	\$8.88
250,000 - 500,000 SF	216,137,239	890,450	5,803,802	10.0%	13.4%	2,178,634	5,717,258	7,094,349	14,360,004	\$6.72
500,000 + SF	302,389,543	1,754,431	13,551,380	6.7%	8.7%	691,225	8,076,719	8,355,299	14,561,458	\$5.97

BIGGEST LEASE OF THE QUARTER

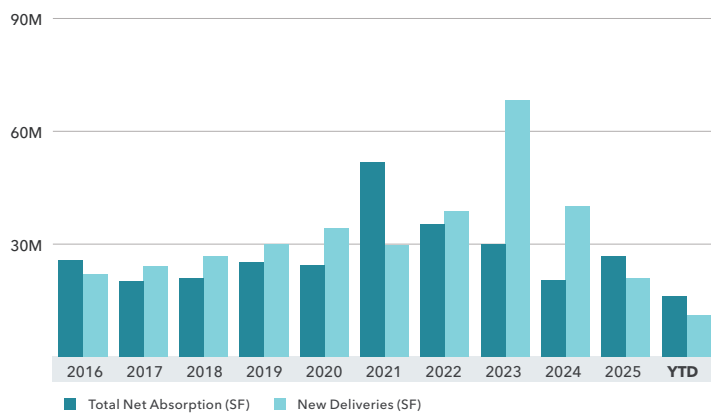
Passport Park West 6, Dallas



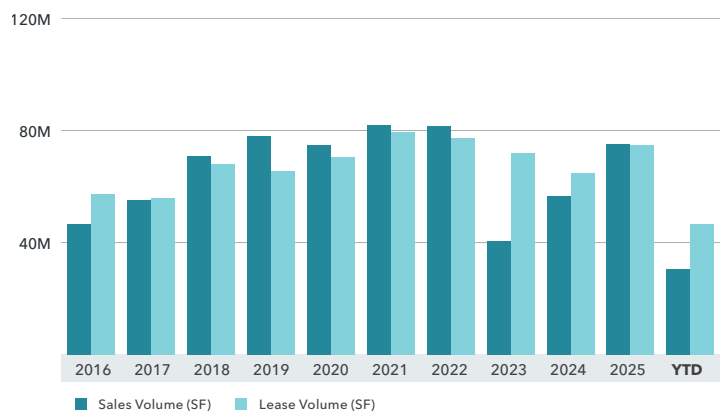
LEASE RATE, VACANCY & AVAILABILITY



NET ABSORPTION & NEW DELIVERIES



SALE VOLUME & LEASE VOLUME



Data Source: CoStar



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COMMERCIAL BROKERAGE

\$9B

AVERAGE ANNUAL TRANSACTION VOLUME

32.4M

ANNUAL SALES SF

32.5M

ANNUAL LEASING SF

ASSET SERVICES

55M+ SF

MANAGEMENT PORTFOLIO SIZE

800+

ASSETS UNDER MANAGEMENT

250+

CLIENTS SERVED

VALUATION ADVISORY

2,700+

AVERAGE ASSIGNMENTS

42

TOTAL APPRAISERS

23

WITH MAI DESIGNATIONS