

# Miami-Dade County Industrial Market Report

Q4 2025 Update with Submarket Data & Forecasting

## Executive Summary

Miami-Dade County's industrial real estate market in Q4 2025 was shaped by its position within the South Florida region, the functionality of available warehouse and flex inventory, and access to I-75, Florida Turnpike, SR-826, PortMiami/MIA. By year-end 2025, the market was transitioning from rapid post-pandemic rent growth toward more balanced negotiations, with performance varying materially by submarket and building quality. Industrial demand is shaped by port and airport logistics, population-serving distribution, trade, food/cold-chain users and a constrained infill land base. Availability and pricing vary sharply by submarket and building functionality. County-level rent, vacancy, absorption and construction statistics are shown only when public market coverage reports them separately.

## Key Market Fundamentals

| Metric                     | Q4 2025 Performance                   |
|----------------------------|---------------------------------------|
| Total Industrial Inventory | Not publicly reported at county level |
| Quarterly Leasing Activity | 3.9M SF                               |
| Overall Vacancy Rate       | 6.8%                                  |
| Average Asking Rent        | \$16.74/SF NNN                        |
| New Deliveries             | 402,683 SF                            |

## Submarket Breakdown & Analysis

- **Airport West:** The county's principal concentration of warehouse, flex, service-industrial or manufacturing activity.
- **Medley:** A secondary industrial node serving local distribution, contractors and population-driven users.
- **Hialeah/Hialeah Gardens:** A specialized or emerging operating area where utilities, zoning and access should be confirmed.
- **South Dade:** A location-dependent node whose performance is influenced by available sites and freight connectivity.
- **Freight and access framework:** I-75, Florida Turnpike, SR-826, PortMiami/MIA.

## Notable Industrial Transactions & Development

- No Q4 2025 county-specific industrial sale, lease or development transaction with complete, independently verifiable public terms was selected for this report. This does not mean no transaction occurred; confidential leases, private sales and off-market activity may not appear in public reporting.

## Market Forecast & Outlook (Q4 2025)

**1. Leasing and rents:** Over the following 12 months, asking-rent performance should remain most defensible for functional infill warehouse, flex and service-industrial space. Older product may require concessions or capital improvements when loading, clear height or truck access is deficient.

**2. Supply and vacancy:** New construction should be evaluated at the applicable metro or corridor level. For Miami-Dade County, a small number of deliveries or move-outs can materially affect availability, particularly where the industrial inventory is limited.

**3. Investment and off-market activity:** Buyer demand should continue to favor durable occupancy, replacement-cost advantages and properties with yard, power or location characteristics that are difficult to reproduce. Confidential and off-market transactions may not appear in public statistics.

## Industrial Property Focus

For Miami-Dade County acquisitions and leasing requirements, evaluate warehouse and flex functionality, loading, clear height, power, truck circulation, flood exposure, zoning, outside-storage permissions, yard security, utilities and proximity to I-75, Florida Turnpike, SR-826, PortMiami/MIA. HDK Capital also canvasses owners for off-market industrial, IOS, fenced-yard and sale-leaseback opportunities.

**DISCLOSURE:** County totals are shown only when a public source reports that county separately. Regional, metro and multi-county totals are never presented as county totals. Public information is believed reliable but has not been independently audited and may be incomplete, delayed or revised. "Not publicly reported" does not imply zero activity. This is not an appraisal, valuation, legal, tax or investment opinion. Verify all facts, availability and transaction terms independently.