

Availability ticks up following modest move-outs, fewer deliveries

▲ 4.8%

Availability Rate

▼ (196K)

SF Net Absorption (000s)

▼ 66K

SF Completed (000s)

▼ \$17.78

Avg. Asking Rent (NNN)

Note: Arrows indicate change from previous quarter.

Source: CBRE Econometric Advisors, Q3 2025.

MARKET HIGHLIGHTS

— The Fort Worth retail market closed Q3 2025 with an availability rate of 4.8%. This represented a .2% increase from Q2 2025.

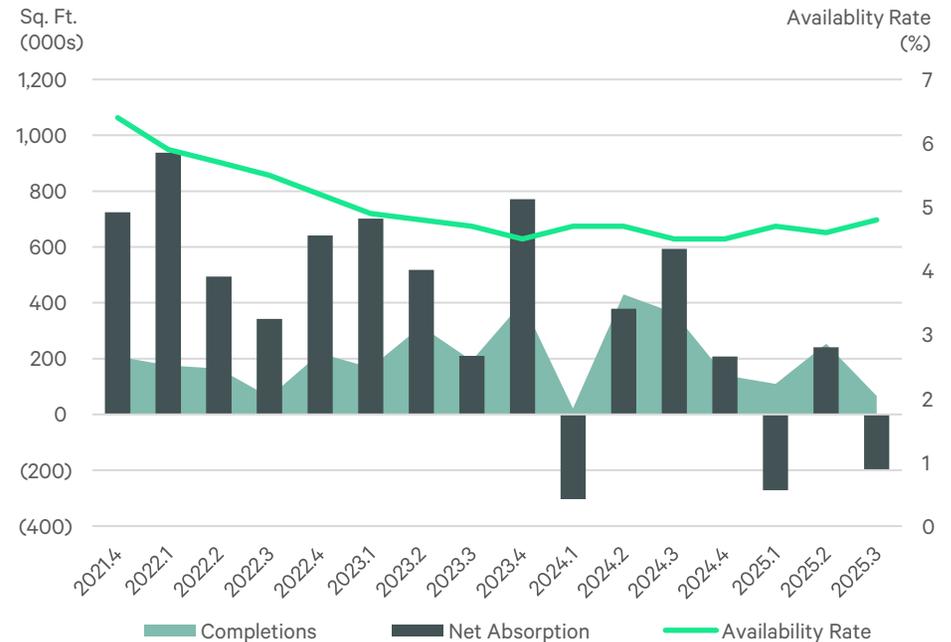
— The total retail sq. ft. absorbed in Q3 2025 was negative 196,000 sq. ft., compared to positive 241,000 sq. ft. in Q2 2025.

— There was 66,000 sq. ft. delivered in Q3 2025, compared to 253,000 sq. ft. in Q2 2025.

— The overall average net asking rent for retail in Fort Worth ended Q3 2025 at \$17.78, representing a -\$0.03 change from Q2 2025.

— The total retail investment sales in Q3 2025 amounted to \$59.6 million in total volume, compared to \$61.9 million in Q2 2025.

FIGURE 1: Completions, Net Absorption, and Availability Rate



Source: CBRE Econometric Advisors, Q3 2025.

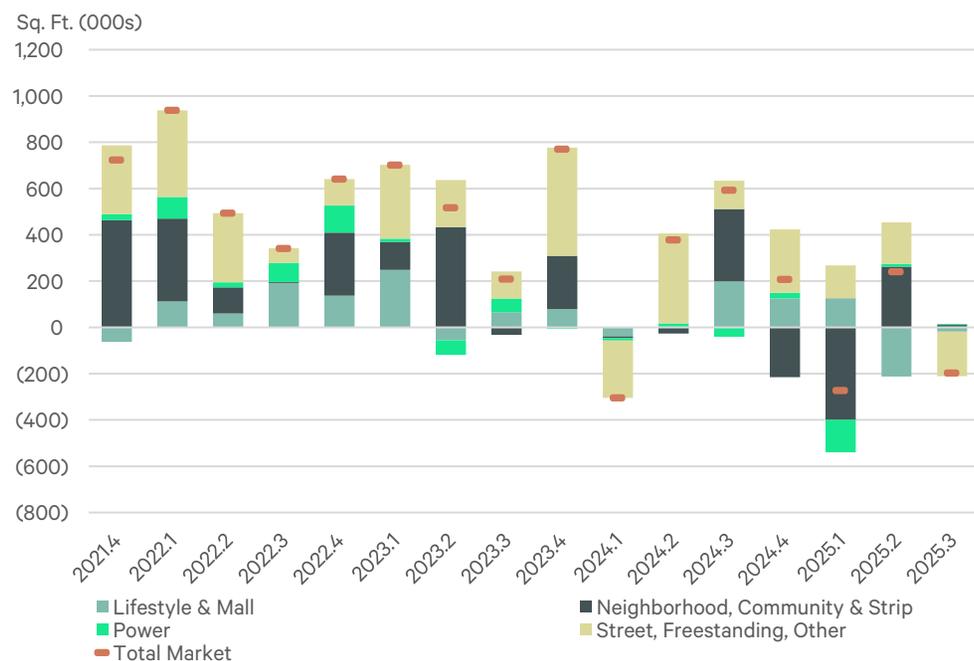
Market Overview

FIGURE 2: Market Statistics by Product Type

Market	Inventory (SF, 000s)	Availability Rate (%)	Net Absorption (SF 000s)	Completions (SF 000s)	Net Rent
Lifestyle & Mall	15,191	4.8	(18)	-	\$22.14
Neighborhood, Community & Strip	56,174	8.0	11	50	\$16.56
Power	14,175	4.0	4	-	\$33.64
Street, Freestanding, Other	82,476	2.8	(193)	16	-
Total Market	168,016	4.8	(196)	66	\$17.78

Source: CBRE Econometric Advisors, Q3 2025.

FIGURE 3: Net Absorption by Center Type



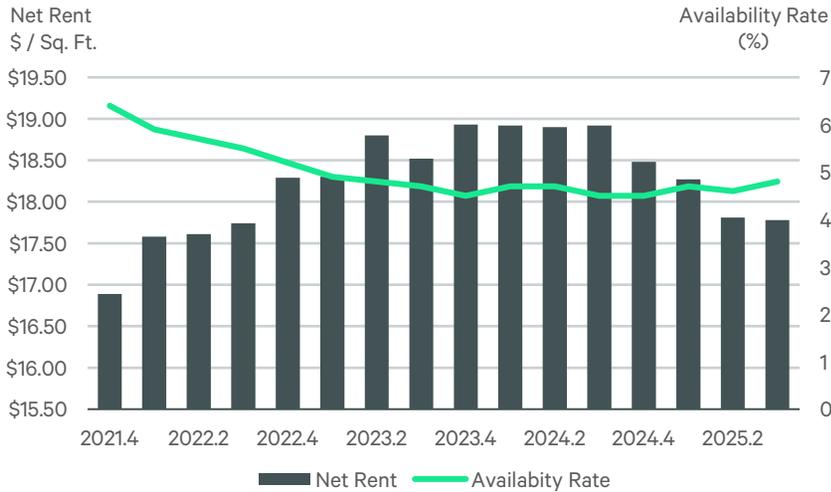
Source: CBRE Econometric Advisors, Q3 2025.

FIGURE 4: Market Statistics by Submarket

Market	Inventory (SF 000s)	Availability Rate (%)	Net Absorption (SF 000s)	Completions (SF 000s)	Net Rent
Total Market	168,016	4.8	(196)	66	\$17.78
CBD/Ft Worth SW/SE	7,314	4.6	14	-	\$16.57
Coppell/Las Colinas	6,680	5.0	(76)	-	\$29.08
DFW Airport/Irving	10,381	4.5	(65)	-	\$18.64
East Ft Worth	3,767	2.2	9	-	\$13.71
Grapevine/Colleyville	7,981	5.1	6	-	\$18.15
Hurst/Euless/Bedford/RH	14,770	6.5	(26)	-	\$16.75
N Ft Worth/Haltom City	7,827	5.6	(63)	10	\$19.25
N Grand Prairie	7,241	4.0	(10)	-	\$13.17
North Arlington	4,796	5.1	12	-	\$16.82
Outlying Fort Worth	9,981	3.2	17	30	\$23.08
Outlying Ft Worth	17,788	3.4	(31)	26	\$18.34
SE Tarrant/S Arlington/S Gd Pr	26,639	3.5	8	-	\$19.07
Trophy/Roanoke/W Lake/Soutl	5,219	4.0	(29)	-	\$19.64
Watauga/Keller/NRH	8,806	5.7	(2)	-	\$16.78
West Ft Worth	14,170	8.4	63	-	\$17.44
Wht Settle/SW Ft Worth	14,656	4.8	(23)	-	\$16.89

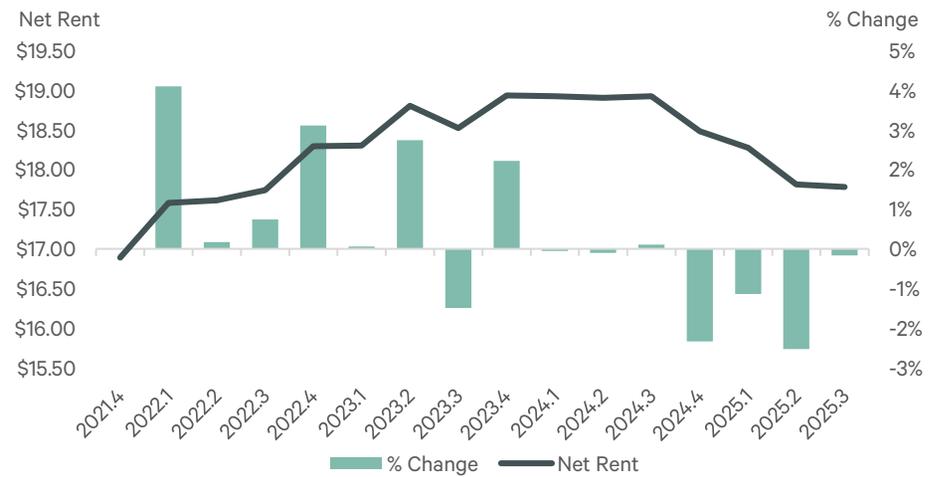
Asking Rents & Availability

FIGURE 5: Net Asking Rent and Availability Rate



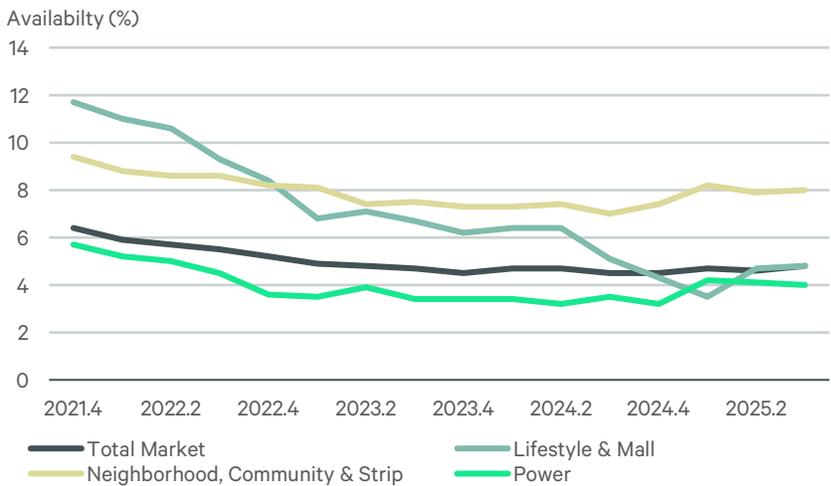
Source: CBRE Econometric Advisors, Q3 2025.

FIGURE 6: Net Rent and % Change



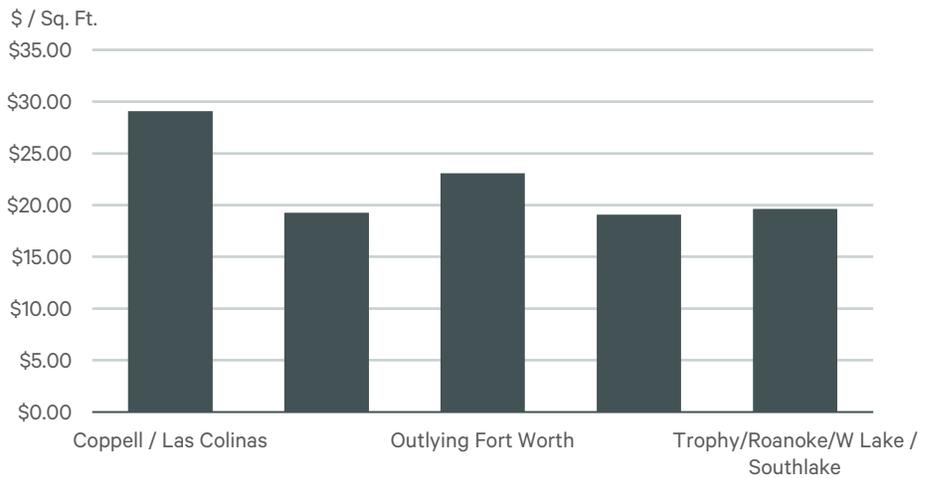
Source: CBRE Econometric Advisors, Q3 2025.

FIGURE 7: Availability by Center Type



Source: CBRE Econometric Advisors, Q3 2025.

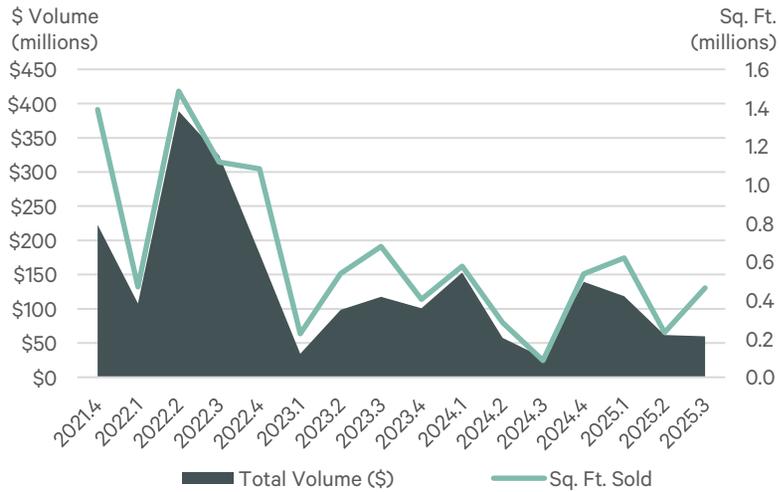
FIGURE 8: Top 5 Submarket by Net Rent



Source: CBRE Econometric Advisors, Q3 2025.

Investment Sales

FIGURE 9: Retail Investment Sale Volume



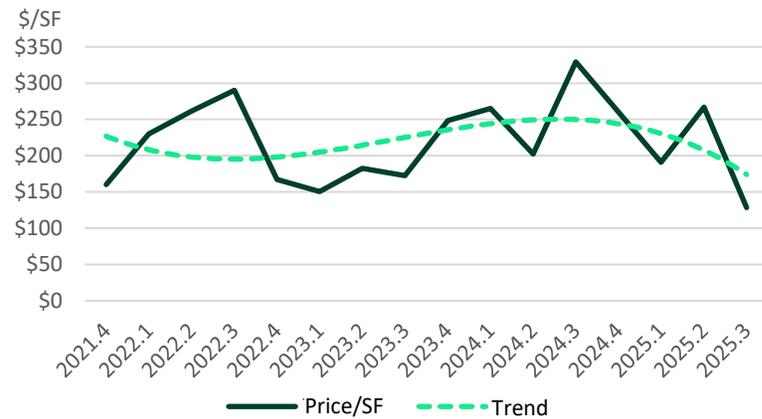
Source: MSCI Real Capital Analytics, Q3 2025.

FIGURE 11: Q3 2025 Sale Transactions

Buyer	Property Name	City	Building SF
Onyx Partners Ltd	JCPenney	Arlington	149,094
Onyx Partners Ltd		Fort Worth	103,709
Stars Of Sublett Corners Invs	Sublett Corners Shopping Ce	Arlington	81,900
Criterion Trail Lake Plaza LL	Trail Lake Plaza	Fort Worth	33,120
Bridgeway Properties LLC	Haltom City Center	Haltom City	24,000
SITE Centers Corp	Village at the Ballpark	Arlington	23,414
Mohinder S Mashiana	Liq O Rama	Saginaw	16,815
Aurora Venues LLC	121 Elm Street	Keller	11,618
Safa & Sons LLC	Champions Center	Fort Worth	10,720
Timothy T Ouellette	Bear Creek Plaza	Eules	9,685

Source: MSCI Real Capital Analytics, Q3 2025.

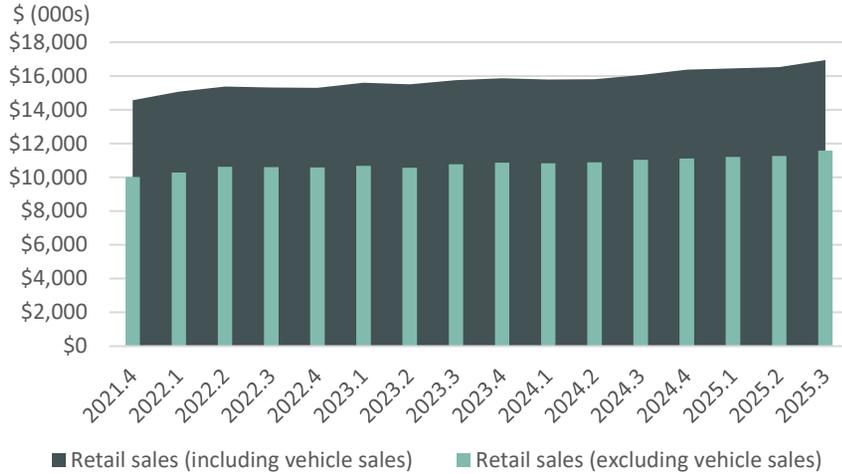
FIGURE 10: Retail Investment Sale Price Per Sq. Ft.



Source: MSCI Real Capital Analytics, Q3 2025.

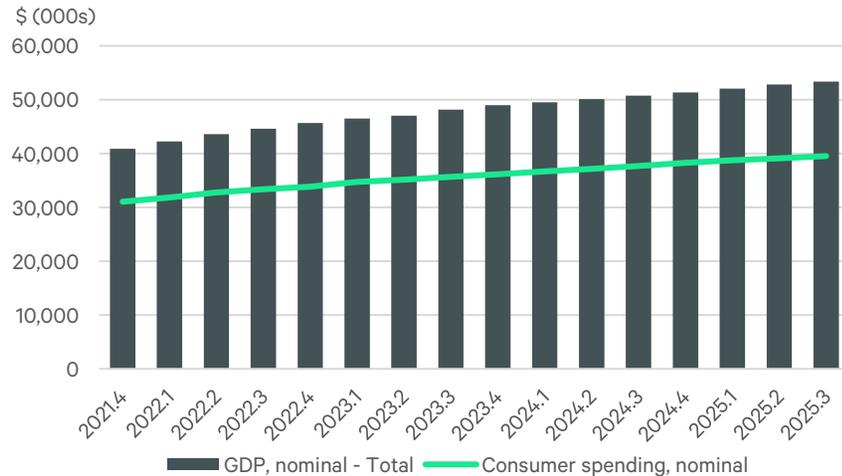
Economic Overview

FIGURE 12: Total Retail Sales



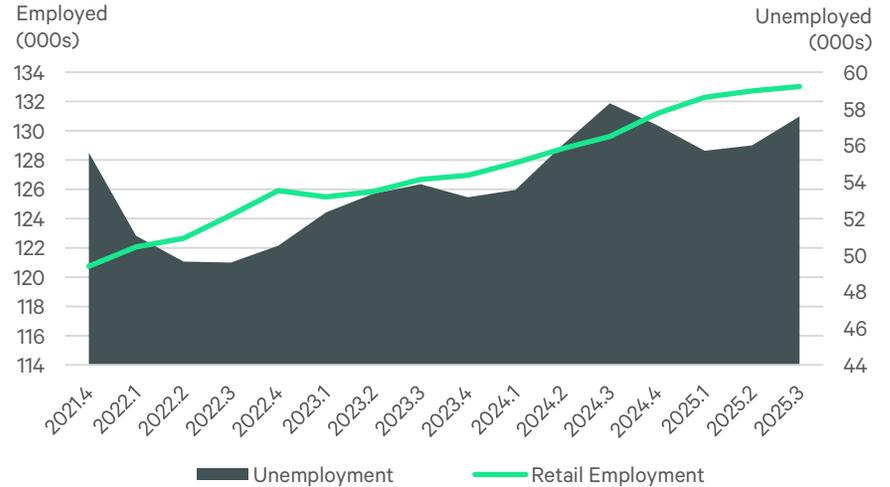
Source: Oxford Economics, Q3 2025.

FIGURE 14: GDP & Consumer Spending



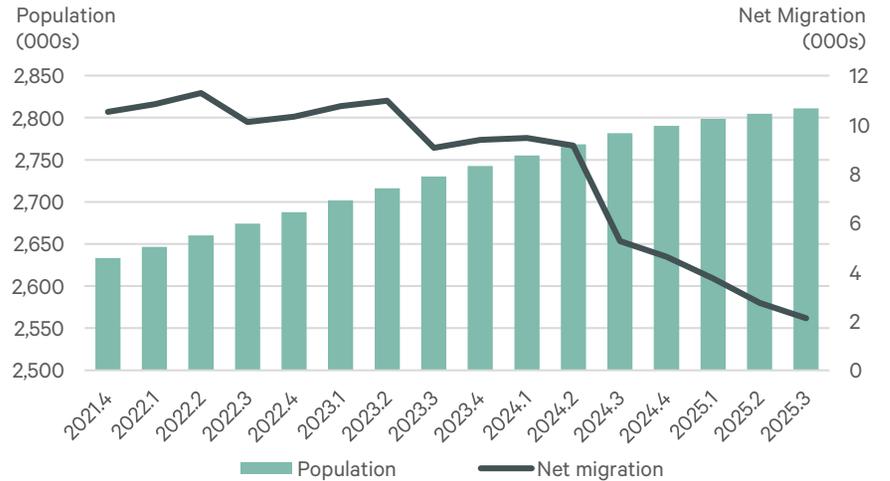
Source: Oxford Economics, Q3 2025.

FIGURE 13: Retail Employment vs. Unemployment



Source: Oxford Economics, Q3 2025.

FIGURE 15: Total Population & Net Migration



Source: Oxford Economics, Q3 2025.

Contacts

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Retail Definitions

Neighborhood, community and strip centers are groupings of buildings where there is most often an anchor property (except strip). Neighborhood properties are the largest ranging from 125,000 to 400,000 sq. ft., followed by community at 30,000 to 125,000 sq. ft., and strip with 30,000 or less sq. ft.

Lifestyle are upscale national-chain specialty stores with dining and entertainment in an outdoor setting. Lifestyle centers range from 150,000 to 500,000 sq. ft. Malls, including both regional and super regional malls, can provide a wide range of goods and services. Regional malls are built around full-line department stores and usually range over 300,000 sq. ft. Super regional malls are usually over 750,000 sq. ft. with more department stores.

Power Centers are category-dominant anchors, including discount department stores, off-price stores, and wholesale clubs, with only a few small tenants. They range from 250,000 to 600,000 sq. ft. and have multiple anchors.

Freestanding Retail are single-tenant occupied retail buildings. All other variables may vary.

Market Definition

The Fort Worth market consists of Hood County, Johnson County, Parker County, Somervell County, Tarrant County, Wise County.

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