The Eureka Retail Velocity Index™

Dallas-Fort Worth Market | June 2026

5.3 / 10.0

▼0.1 MoM

* Minor softening from prior month

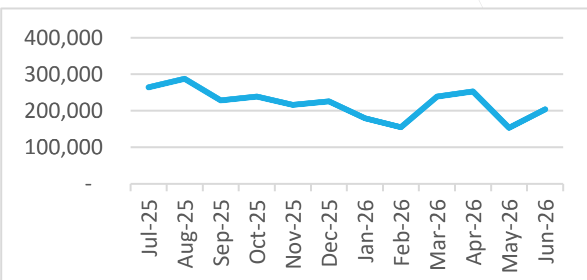
This Month: DFW retail leasing activity improved in June, with higher transaction volume, larger average deal sizes, faster lease execution, and slightly lower vacancy. However, softer rents and longer vacancy exposure kept overall momentum muted, reinforcing a selective, asset-specific market.

Total Leased SF:	204,000 SF ▲	**Lease Term Months:**	62.60 ▲	**Market Vacancy:**	5.14% ▲
Average Leased SF:	2,956 SF ▲	**Months to Lease:**	10.7 ▼	**% of leases as NNN:**	85.00% ▲
Average Rent (NNN):	$21.09 PSF ▼	**Months Vacant:**	11.4 ▲		

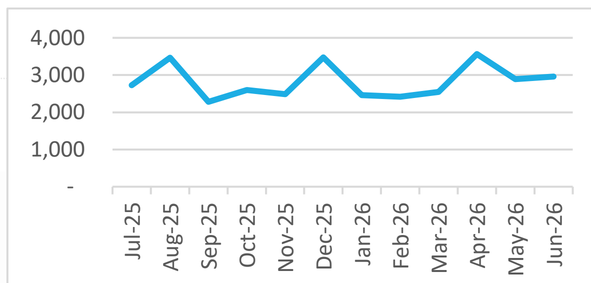
▲/▼ indicates month-over-month movement

Dallas – Fort Worth Market Trailing 12 Months:

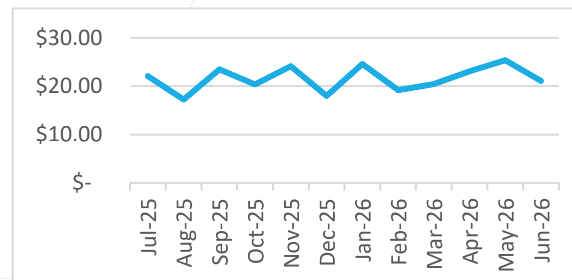
Total SF Leased T12



Average Leased SF T12



Average Rent/SF T12



Landlord Insights

- Defend rents in well-located, quality assets
- Reprice long-vacant spaces
- Trade concessions for longer terms & stronger credit

Pricing Power Indicator™

* Softer rents favor tenants, but low vacancy limits leverage.

Tenant Insights

- Quality second-gen space remains in high demand
- Use softer rents as leverage
- Use term & financial strength to improve economics

Methodology

The **Eureka Retail Velocity Index™** is a proprietary monthly market intelligence product from **Eureka Business Group** tracking retail leasing activity, pricing momentum, vacancy compression, and negotiation leverage across the Dallas-Fort Worth market. The **Eureka Retail Velocity Index™** is designed to provide actionable market intelligence for landlords, tenants, and investors operating in the middle-market retail segment. The index benchmarks current performance against trailing 12-month market averages to assess directional momentum. The Velocity Score integrates leasing activity, pricing momentum, vacancy compression, and leasing efficiency. Scores range from 1.0-10.0.

Data is collected from EBG proprietary leasing data and other sources such as CoStar® and CREXi®.

Deal Spotlight

June was anchored by Crunch Fitness's 49,835 SF, 15.5-year lease in McKinney at a reported $20.45 PSF starting rent. A 5,000 SF, 10-year lease in West Dallas at a reported $35 PSF NNN starting rent showed continued demand for quality space, while an 8,400 SF Fort Worth transaction marketed at $9 PSF NNN highlighted value-driven absorption in older inventory. Together, these deals reinforce **the market's selective, two-speed nature**.

90-Day Outlook

DFW retail leasing activity is expected to remain steady but uneven through Q3. Vacancy near 5% should continue to support well-located centers, second-generation space, and strong suburban trade areas, while larger transactions may continue to influence monthly volume. Tenant demand should remain active, but softer rents suggest pricing power will depend more on asset quality, visibility, co-tenancy, and space condition than on broad market strength.

Landlords with quality space should be able to defend terms, while older centers and long-vacant spaces may need realistic pricing, targeted concessions, or flexible deal structures to maintain momentum. Tenants should continue to find selective negotiating leverage, although faster lease execution means desirable spaces may require quicker decisions. Overall, absorption should continue, but performance will remain highly property-specific.

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