The Eureka Retail Velocity Index™

Dallas-Fort Worth Market | July 2026

4.5 / 10.0

▼0.8 MoM

* Notable softening from prior month

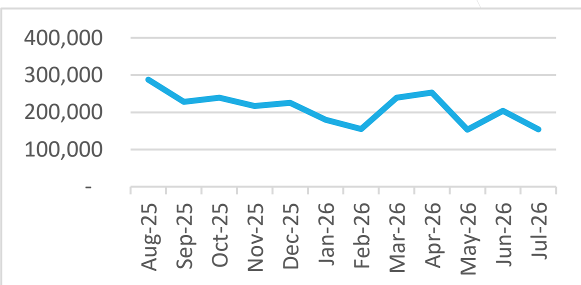
This Month: DFW retail leasing posted its lowest Velocity Score of 2026, with volume and deal size declining for the third consecutive month. Rising vacancy and shrinking deal sizes signal a widening gap between newer product and aging inventory, though faster lease execution and modest rent gains suggest demand remains active yet increasingly selective.

Total Leased SF:	154,000 SF ▼	**Lease Term Months:**	56.40 ▼	**Market Vacancy:**	5.15% ▲
Average Leased SF:	2,293 SF ▼	**Months to Lease:**	10.00 ▼	**% of leases as NNN:**	91.53% ▲
Average Rent (NNN):	$21.35 PSF ▲	**Months Vacant:**	9.80 ▼		

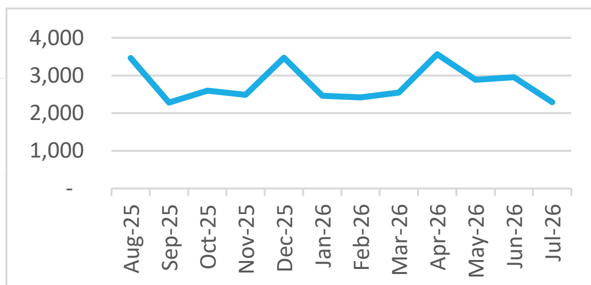
▲/▼ indicates month-over-month movement

Dallas – Fort Worth Market Trailing 12 Months:

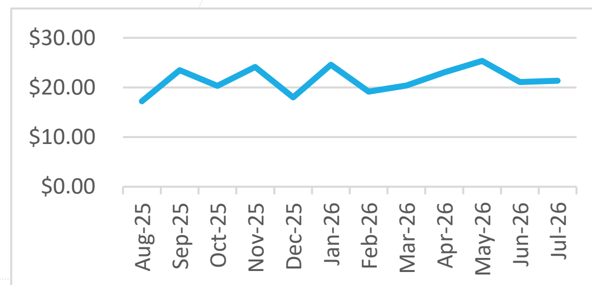
Total SF Leased T12



Average Leased SF T12



Average Rent/SF T12



Landlord Insights

- New product is pulling tenants from older assets
- Reposition or reprice older inventory
- Compete on condition & co-tenancy, not just location

Pricing Power Indicator™

Landlord ▼ Tenant

* Softer leasing favors tenants, but low vacancy still limits leverage.

Tenant Insights

- More inventory creates greater site choice
- Use slower leasing volume to negotiate economics
- Faster execution = shorter negotiation windows

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

July's transactions reinforced the widening gap between newer, well-positioned product and older inventory. In McKinney, a **2,463 SF lease at 5121 S Custer Rd** was marketed at **$35.00 PSF** in a **2025-built Class A property**, while a **6,750 SF lease at 760 N Highway 67 in Midlothian** was marketed at **$32.00 PSF** in a **2024-built property**.

By contrast, **Parkwood Village in Hurst leased 2,415 SF marketed at $9.00 PSF** after more than three years of vacancy, illustrating how older inventory may require aggressive pricing to secure occupancy. Together, these transactions show how **asset quality and realistic pricing are producing increasingly different leasing outcomes across DFW**.

90-Day Outlook

DFW retail leasing is expected to remain active but **increasingly selective** through the next 90 days. Expanding inventory should give tenants more options and modestly increase negotiating leverage, particularly in older or less differentiated centers, while well-located newer product should **continue to attract strong demand** and support premium rents.

Leasing volume may remain uneven as tenants take a more deliberate approach to site selection, but faster execution and continued demand for quality second-generation space should support ongoing absorption. **If volume remains below 175KSF for a third consecutive month, we expect landlord concessions to broaden beyond secondary assets into B+ locations**.

Contact Information

Joseph Gozlan, Managing Principal
Eureka Business Group | DFW Retail & Net Lease Investment Advisory | The Retail Navigator®
M: (903) 600-0616
E: Joseph@EBGTexas.com
W: www.EBGTX.com
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