

#1 of 8: Share of the Market's Post-2020 Homes in Its Top Three Cities

63.4% of New Homes in the Hill Country

Top 3 cities dominate post-2020 delivery

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THE DATA

63.4%

Share of the Market's Post-2020 Homes in Its Top Three Cities

Boerne, Kerrville, and Fredericksburg account for over six in ten new homes built since 2020 in the Texas Hill Country.

This concentration reflects a structural shift in housing supply, where development is increasingly centralized in just three cities. This imbalance may affect long-term affordability, infrastructure capacity, and community character in less-developed areas.

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 • ALEX Intelligence computation

<https://alex-companies.com/data/2026-10-31-hill-country-tx-concentration-new-homes-place>



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01

Growth is not spreading— it's stacking

The data reveals a pattern of hyper-concentration: 63.4% of new homes are clustered in three cities, while the rest of the Hill Country sees minimal new delivery. This stacking effect suggests that land availability, zoning, and infrastructure planning are becoming increasingly uneven. Areas without existing development corridors may struggle to attract new investment, even as demand grows. The risk is not just spatial inequality, but a future where housing choice is defined by proximity to these three hubs.

02

The '3-city core' is reshaping regional identity

As Boerne, Kerrville, and Fredericksburg absorb the vast majority of new housing, they are becoming de facto regional centers—not just for housing, but for services, employment, and civic life. This shift may erode the traditional decentralized identity of the Hill Country, where each town maintained relative autonomy. Over time, the region risks becoming functionally two-tiered: a dense core and a peripheral fringe with limited access to new opportunities. The question is not whether growth is happening, but whether it is inclusive.

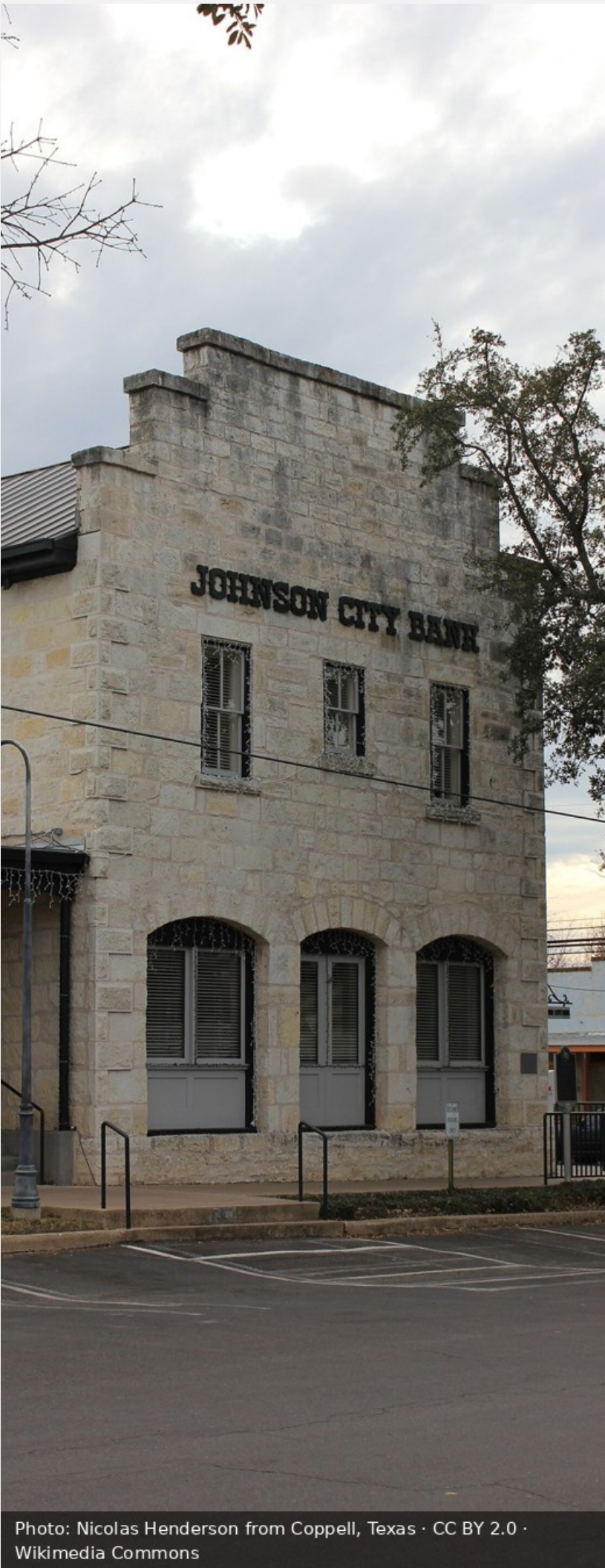


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