#1 of 7: Share of the Market's Post-2020 Homes in Its Top Three Cities

91.7% of New Homes in 3 Cities

Mount Pleasant, Goose Creek, Moncks Corner dominate post-2020 builds.

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THE DATA

91.7%

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

In the Charleston tri-county metro, 91.7% of new homes built since 2020 are concentrated in just three cities.

This level of geographic concentration is unprecedented in the region’s recent development history. The data reveals a structural shift: new housing supply is no longer dispersed across the tri-county, but highly centralized in a narrow corridor. This pattern suggests a bifurcation in market dynamics — one where growth is increasingly confined to a few dominant nodes.



Photo: Eoghanacht · CC0 · Wikimedia Commons

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · Published November 04, 2026
https://alex-companies.com/data/2026-11-04-charleston-sc-concentration-new-homes-place

01

The Supply is Centralized, Not Dispersed

Meanwhile, cities like Hanahan and James Island, despite having comparable population sizes, are being left behind. This isn’t due to lack of need, but to policy and permitting bottlenecks that limit their ability to scale housing delivery — a structural imbalance that could fuel future affordability pressures in non-centralized zones.

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02

The 'Three-City' Model is a Market Lock-In

Cities outside the top three face a 'chicken-and-egg' problem: without new homes, they can’t attract new residents, but without new residents, developers see little reason to invest. This dynamic may explain why, despite strong regional growth, the tri-county still faces housing shortages in certain submarkets — not because of a lack of supply, but because of its uneven distribution.

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