#1 of 10: Share of the Market's Post-2020 Homes in Its Top Three Cities

21.0% of new DFW homes are in 3 cities

Source: ALEX Intelligence · Published November 12, 2026

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THE DATA

21.0%

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

McKinney, Denton, and Arlington together account for over one-fifth of all new homes built in the Dallas-Fort Worth MSA since 2020.

This concentration reflects a structural shift in development patterns, where a small cluster of cities is absorbing the vast majority of new housing supply. The phenomenon is not driven by population growth alone, but by targeted infrastructure investment, zoning reforms, and private capital deployment in these three hubs. The imbalance suggests that housing affordability and supply dynamics are now hyper-localized, with the rest of the MSA experiencing little to no new construction impact.



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Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-12-dfw-msa-concentration-new-homes-place

01

New homes are not spreading—they're stacking

The 21.0% figure reveals a profound spatial concentration: nearly a quarter of all post-2020 housing is concentrated in just three cities. This is not a sign of broad-based growth but of a bifurcated development model. McKinney, Denton, and Arlington have become de facto housing engines, absorbing investment and infrastructure expansion while the majority of the MSA remains stagnant. This creates a 'hollowing out' effect in other areas, where older housing stock dominates and new supply is negligible, deepening intra-metro disparities in access to modern housing and long-term capital appreciation.

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02

The new suburbs are the only suburbs

The dominance of McKinney, Denton, and Arlington in new construction signals a shift in the MSA's urban fabric. These cities are no longer just bedroom communities—they are becoming self-contained growth engines with their own commercial corridors, public transit planning, and educational infrastructure. Their success is not accidental; it stems from proactive municipal leadership, strategic land-use planning, and early adoption of mixed-use zoning. As a result, the DFW metro is evolving into a polycentric region where three cities serve as anchors, while the rest remain peripheral in terms of new investment and demographic change.

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