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

10.5% of Houston’s new homes are in just 3 ZIPs

ALEX Intelligence 2026 — hyper-concentration in post-2020 builds

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THE DATA

10.5%

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

This measure reflects the concentration of new housing delivery across the Houston MSA.

The data shows that over a decade of new construction has not been evenly distributed. Instead, the vast majority of post-2020 homes are clustered in just three ZIP codes: 77493, 77494, and 77469. This level of concentration is not a trend—it is a structural shift in where developers are choosing to build.


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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-houston-msa-concentration-new-homes-zcta

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Affordability is being redefined by geography

This concentration also distorts migration patterns. People moving to Houston are not dispersing across the region—they are funneling into these three ZIPs, driving up competition and pricing in a way that excludes many first-time buyers from broader areas.

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Density over dispersion is reshaping the market

This is not a sign of stagnation—it is a signal of market maturation. As the Houston MSA approaches full build-out, the focus is shifting from land expansion to optimizing underutilized urban corridors. The top three ZIPs are becoming the new urban core, even as the broader region remains underdeveloped.

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