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

16.7% of new Nashville homes in 3 ZIPs

Source: ALEX Intelligence · Published November 15, 2026

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THE DATA

16.7%

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

The clustering of new construction in ZIP 37203, 37128, and 37013 reflects a strategic consolidation of land, infrastructure, and developer capital. These areas are not accidental — they are where zoning, utility access, and transportation networks align to support rapid, high-density development. This concentration signals a shift from broad-based growth to targeted urban expansion, where capital and policy are converging on a narrow geographic footprint.

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates, 2024 · ALEX Intelligence computation
https://alex-companies.com/data/2026-11-15-nashville-concentration-new-homes-zcta

01

Growth is not spreading — it's stacking

The fact that nearly one in six new homes in Nashville since 2020 are located in just three ZIP codes reveals a deepening spatial inequality in development. While some neighborhoods experience explosive construction, others remain stagnant or decline. This creates a dual economy: high-density, high-amenity zones with rising property values, and underinvested areas with stagnant equity. The result is not just a physical divide, but a future where access to new housing, jobs, and services becomes increasingly tied to zip code — not just income or race.

02

The market is building its future in one place

This hyper-concentration suggests that developers and investors are betting on a single, highly optimized node rather than spreading risk across multiple corridors. The top three ZIPs — all within Davidson, Cheatham, and Sumner counties — benefit from proximity to major employment centers, highway access, and existing infrastructure. But this also means the market's resilience is vulnerable: if one of these areas faces a downturn, regulatory pushback, or infrastructure failure, the entire growth engine could stall. The city's future is no longer diversified — it's centralized.

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