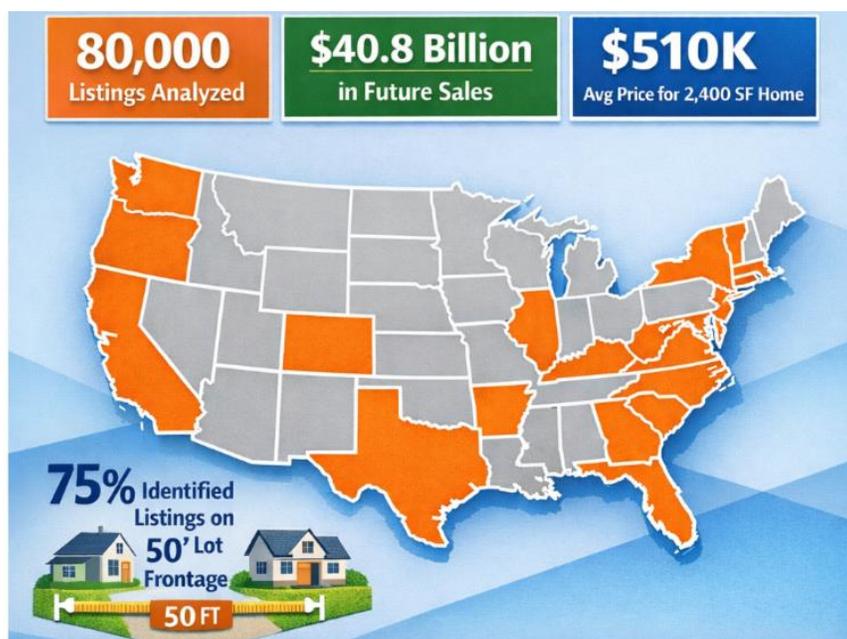


## State-Level Q1 2026 New Home (QMI) Market Analysis

LandfinderAI analyzed 80,000± Quick Move-In (QMI) new home listings across 16 states in Q1 2026, representing a significant pipeline of near-term residential supply and future development activity. The data reveals strong geographic concentration, consistent lot sizing trends, and meaningful pricing variation tied to market maturity and development intensity. Our focus is on the southeast, but we also analyzed Nevada and Arizona given their status as a destination for buyers.



### Market Concentration

New home inventory is heavily concentrated in a few high-growth states:

- **Texas** accounts for **43,960 listings (55.8% of total supply)**, confirming its position as the dominant production market driven by large-scale master-planned development and lower cost structures.
- **Florida** follows with **15,139 listings (19.2%)**, reflecting continued population-driven housing demand and constrained land supply.
- **Arizona** ranks third with nearly 8% of listings, while Southeastern growth markets including **Georgia, North Carolina, and Tennessee** collectively represent a meaningful secondary tier of development activity.

This distribution indicates that Sunbelt migration trends and pro-growth regulatory environments continue to drive the majority of new home production.

Q1 2026 QMI (Quick Move In) Analysis								
State	Public Data					Lot Allocation Analysis		
	# of QMI	Avg Asking Price	Avg QMI BSF	Avg \$/BSF	Avg QMI FF	Rural Lot	Transitioning Lot	Infill Lot
Texas	43,960	\$505,166	2,535	\$199.28	52.2	\$85,878	\$111,136	\$136,395
Florida	15,139	\$531,867	2,279	\$233.39	48.8	\$90,417	\$117,011	\$143,604
Arizona	6,266	\$558,890	2,250	\$248.37	51.7	\$95,011	\$122,956	\$150,900
Georgia	4,289	\$462,971	2,369	\$195.46	46.3	\$78,705	\$101,854	\$125,002
North Carolina	3,382	\$459,654	2,306	\$199.36	45.8	\$78,141	\$101,124	\$124,107
Tennessee	2,200	\$517,610	2,303	\$224.75	45.3	\$87,994	\$113,874	\$139,755
Nevada	1,937	\$724,388	2,412	\$300.36	46.4	\$123,146	\$159,365	\$195,585
Alabama	1,668	\$312,377	1,881	\$166.09	50.0	\$53,104	\$68,723	\$84,342

## Home Pricing and Size Trends

Across the analyzed states, pricing and home size reflect differences in land costs, density, and market maturity:

- **Highest pricing: Nevada** leads with an average asking price of approximately **\$724K** and the highest cost per square foot (~\$300/SF), suggesting constrained supply and higher land costs.
- **Mid-tier pricing:** Arizona (~\$559K) and Florida (~\$532K) show strong pricing tied to migration-driven demand.
- **Lower-cost markets: Alabama** averages ~\$312K, reflecting lower development and land costs.

Average home sizes range from roughly **1,880 SF to 2,535 SF**, with larger homes generally observed in lower-cost, land-abundant markets like Texas.

## Price Efficiency (\$/SF)

Cost per square foot shows a clear relationship to urbanization and land constraints:

- Highest: Nevada (~\$300/SF)
- Moderate: Arizona (~\$248/SF), Florida (~\$233/SF), Tennessee (~\$225/SF)
- Lower-cost production markets: Texas, Georgia, and North Carolina (~\$195–\$199/SF)

This spread highlights how regulatory constraints, land scarcity, and density drive pricing efficiency across markets.

## Lot Size Standardization

One of the strongest findings is the consistency in developed lot frontage:

- Average frontage across states ranges from **~45 to 52 feet**
- This supports your broader finding that **~50-foot frontage lots represent the most common production standard**
- Southeastern markets trend slightly smaller (mid-40 ft range), suggesting higher density development patterns.

## Developed Lot Value Gradient by Development Intensity

Estimated lot allocations show predictable value escalation:

- **Rural lots:** ~\$53K – \$123K
- **Transitioning lots:** ~\$69K – \$159K
- **Infill lots:** ~\$84K – \$196K

Higher-density and urban infill markets (particularly Nevada, Arizona, and Florida) command substantial premiums, illustrating the increasing importance of land positioning in overall home pricing.

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## Key State-Level Takeaways

- New home production is highly concentrated, with Texas and Florida representing roughly **75% of total QMI supply**.
- Sunbelt markets dominate both inventory and pricing growth.
- 50-foot frontage remains the national production standard for new home development.
- Price variation is driven primarily by land constraints and urban development intensity rather than home size.
- Infill and transitioning land positions significantly increase total home value.