



Dallas/Fort Worth Metro Multifamily Market Update: Q4 2025 QTD

The bitter irony in oversupply struggles is that it is the best markets that attract the most investment and thereby suffer the worst consequences of overbuilding—*temporarily*. The Dallas/Fort Worth market posted negative absorption in 2023. 24,000 units entered the market, and rents fell for five straight quarters.

That DFW is gone.

We've put together a summary of key metrics for the DFW multifamily market from Q1 2023 through QTD 4 2025. And it illuminates a compelling turnaround. Vacancy has compressed 290 basis points from its peak. Rents have grown for five consecutive quarters, albeit moderately. Effective rents are now 3.1% above their pre-correction levels. New supply has dropped 82%, while absorption has turned decisively positive.

This isn't a dead cat bounce. This has legs. The data tell the story, each quarter from Q1 2023 through today.

What you'll find in this summary:

- Visual of the supply-demand rebalancing (with charts that tell the story at a glance)
 - The quarter when fundamentals shifted
- How 2025's supply pipeline collapse creates a multi-year tailwind.
- What the recent pattern in rent growth predicts going forward.

There's a lot of "noise" in our business. Whether you're evaluating potential acquisitions, refinancing existing assets, in lease-up, or analyzing your geographic exposure, this synopsis gives you basic market intelligence on where we've been and where we're going in a 3-minute read.

The multifamily landscape is shifting. Each market area will follow a unique path, but there are common themes. Like Atlanta, DFW reminds us how quickly the negative effects of oversupply can dry up when new construction slows. It is important to remind ourselves that the positive factors that *attracted the outsized investment remain in place*. When the new supply dries up, there is a rebound effect.

An argument can be made that a good time to buy may be the period after recovery is clear but before it fully manifests.

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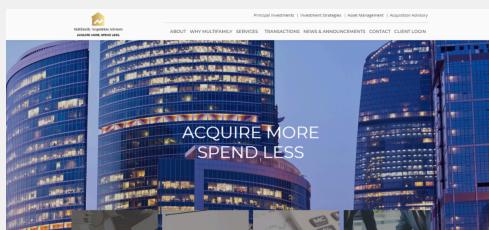
I'll be sending these market dives twice weekly for the top ten metros. If there's a specific market you'd like me to include, just hit "reply" and let me know.

Yours in Success,,

Chris

This analysis reflects conditions as of QTD 4, 2025. Source: CoStar Analytics.

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