Built To Rent Residential Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Residential Real Estate & Housing (Real Estate & Construction)
> **Source:** https://www.mordorintelligence.com/industry-reports/built-to-rent-residential-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 26.58 billion
Projected Forecast (2031)	USD 26.58 billion
Growth Rate (CAGR)	7.82 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Built To Rent Residential industry](images/chart_2.png)

![Built To Rent Residential Market Size](images/chart_3.png)

![Built To Rent Residential Market Share by Type, 2025](images/chart_4.png)

![Built To Rent Residential Market Share by Price Segment, 2025](images/chart_5.png)

![Built To Rent Residential Market Growth Rate by Region](images/chart_6.png)

![Built To Rent Residential Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Market Size (2026) | USD 26.58 Billion |
Market Size (2031) | USD 38.73 Billion |
Growth Rate (2026 - 2031) | 7.82 % |
Fastest Growing Market | Middle East and Africa |
Largest Market | North America |
Market Concentration | Low |

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Built To Rent Residential Market Analysis by Mordor IntelligenceThe Built To Rent Residential Market size is expected to grow from USD 24.65 billion in 2025 to USD 26.58 billion in 2026 and is forecast to reach USD 38.73 billion by 2031 at 7.82% CAGR over 2026-2031.

The built-to-rent residential market is supported by a persistent gap between housing costs and household incomes in major cities. In England, the median home cost 7.6 times median annual full-time earnings in 2025, while private renters spent 34% of household income on rent in 2025[1]Office for National Statistics, “Housing Affordability in England and Wales: 2025,” Office for National Statistics, ons.gov.uk. The built-to-rent residential market benefits when professionally managed rental homes offer longer-term tenure, predictable service, and more space than many conventional apartments. Financing costs and construction expenses remain material constraints, especially for smaller developers that cannot access institutional capital on favorable terms. The built-to-rent residential market also faces uneven local conditions, because supply additions in Phoenix, Dallas, and London can affect occupancy and rent growth even while the broader demand case remains intact.

Key Report Takeaways

* By type, multifamily built-to-rent held a 41.8% share in 2025, while single-family built-to-rent and BTR Communities are forecast to grow at a 9.5% CAGR through 2031.
* By management model, third-party operator arrangements accounted for 61.5% of the built-to-rent market size in 2025, while hybrid management is projected to expand at a 9.1% CAGR through 2031.
* By price segment, mid-market rental held a 48.7% of the built-to-rent market share in 2025, while affordable and workforce housing is expected to record a 9.8% CAGR through 2031.
* By geography, North America commanded a 45.2% of the built-to-rent market size in 2025, while the Middle East and Africa is forecast to grow at a 14.3% CAGR through 2031.

Key Market Trends

Global Built To Rent Residential Market Trends and InsightsDrivers Impact Analysis*

Drivers	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Housing Affordability Challenges Extend Rental Demand	+2.1%	Global, most acute in North America, Western Europe, and APAC urban centers	Long term (≥ 4 years)
Institutional Capital Expands Purpose-Built Rental Supply	+1.7%	North America, United Kingdom, Australia, and Germany	Medium term (2-4 years)
Preference for Spacious and Amenity-Rich Rentals Boosts Demand	+1%	North America, Western Europe, and APAC	Long term (≥ 4 years)
Professional Property Management Enhances Resident Retention	+0.7%	Global, strongest in North America and the United Kingdom	Medium term (2-4 years)
Affordable Housing Partnerships Increase Build-to-Rent Development	+0.6%	North America, Western Europe, and the Middle East and Africa	Short term (≤ 2 years)
Townhouse and Attached Build-to-Rent Formats Improve Project Viability	+0.5%		

North America, the United Kingdom, and Australia | Medium term (2-4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The built-to-rent residential market is led by a limited group of scaled platforms, while much of the sector remains fragmented by geography and asset type. Greystar has development activity in the United States, Europe, and Australia. AMH has continued to use an in-house development approach, with 92% of new home acquisitions in Q3 2025 coming from its own development program. Invitation Homes expanded its development capacity by acquiring ResiBuilt for USD 89 million in January 2026, with up to USD 7.5 million in performance-based earn-outs[2]Invitation Homes Inc., “Invitation Homes Acquires ResiBuilt to Enhance Development Capabilities and Deliver More Housing Solutions for American Families,” Business Wire, businesswire.com. The transaction added an in-house development and general contracting platform for growth in high-demand Southeastern U.S. markets. This move reflects the value that large operators place on control of development pipelines. It may also raise the barrier to entry for smaller companies without comparable construction capabilities. Control of the development process can improve the alignment between home design, construction timing, and long-term operating needs. It can also reduce dependence on an external pipeline when demand strengthens. However, in-house capability requires capital, experienced staff, and sustained development volume. Operators without those resources may continue to rely on third-party managers and development partners. The difference between these approaches adds to the diversity of competitive strategies.

Blackstone’s Tricon Residential opened Tricon Viridian, a 46-home BTR community in Arlington, Texas, in July 2025 through a USD 15 million investment with HHS Residential and Johnson Development[3]Tricon Residential, “Tricon Residential Opens New Community in Arlington, Texas,” Tricon Residential, triconhomes.com. The company’s activity illustrates continued concentration on Texas and other Sun Belt locations. In the United Kingdom, Legal & General, Grainger plc, and Watkin Jones have distinct positions in institutional development, portfolio management, and forward-funded delivery. Mirvac and Lendlease operate scaled BTR platforms in Melbourne and Sydney. These companies compete through funding access, development knowledge, operating capabilities, and local relationships. Operators also seek to distinguish their communities through maintenance responsiveness, amenity offerings, and digital resident services. The built to rent residential market is therefore shaped by both capital scale and the ability to provide reliable day-to-day operations. The company also demonstrates how a partnership can combine capital, local development experience, and resident operations. Such arrangements can be useful where a national owner needs local market knowledge. They can reduce the execution risk that comes from entering a new metropolitan area. The approach still depends on disciplined construction and leasing performance. A strong local project does not remove wider financing constraints.

Technology is becoming more important to competitive positioning in the built to rent residential market. Integrated systems can help operators manage leasing, maintenance, accounting, and resident communication across large portfolios. These tools may help operators standardize service across different communities. They may also make advanced operating capabilities more accessible to smaller managers. Secondary cities with diversified employment and lower institutional penetration remain relevant for new projects. Affordable and workforce housing also remains a strategic area where public concessions can improve development viability. Portfolio scale can lower the unit cost of technology, procurement, and resident support. It can also spread specialist skills across a larger number of homes. Smaller companies can respond through local service knowledge and focused operating models. Investors will compare operating performance as closely as location and rental growth. This makes dependable execution central to platform value.

Built To Rent Residential Industry Leaders* Greystar Real Estate Partners, LLC

* Blackstone Inc.

* Invitation Homes Inc.

* AMH (formerly American Homes 4 Rent)

* Tricon Residential Inc.

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Built To Rent Residential Market Report ScopeBy TypeMultifamily Built to Rent |
Single-Family Built to Rent / Built to Rent Communities |
Purpose-Built Rental Apartments |
Purpose-Built Rental Houses / Townhomes |

Segmentation Accordion Item

By GeographyNorth America | United States |
 | Canada |
 | Mexico |
Europe | United Kingdom |
 | Germany |
 | France |
 | Italy |
 | Spain |
 | Russia |
 | Rest of Europe |
Asia-Pacific | China |
 | India |
 | Japan |
 | Australia |
 | South Korea |
 | SouthEast Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines) |
 | Rest of Asia-Pacific |
South America | Brazil |
 | Argentina |
 | Rest of South America |
Middle East and Africa | Saudi Arabia |
 | United Arab Emirates |
 | Turkey |
 | South Africa |
 | Nigeria |
 | Rest of Middle East and Africa |

Frequently Asked Questions

What is the projected value of the built to rent residential market by 2031?

The built to rent residential market is forecast to reach USD 38.7 billion by 2031, rising from USD 26.6 billion in 2026 at a 7.8% CAGR.

Which property type is growing fastest in build-to-rent housing?

Single-Family Built to Rent and BTR Communities are forecast to grow at a 9.5% CAGR through 2031.

Which management model has the largest share?

Third-party Operator arrangements held 61.5% of the sector in 2025, while Hybrid Management is forecast to grow at a 9.1% CAGR.

Why is affordable and workforce rental housing expanding?

Affordable and Workforce Housing is expected to grow at a 9.8% CAGR, supported by public partnerships, affordability requirements, and housing demand.