



Yardi Matrix

Single-Family Build-to-Rent National Report

June 2026



Single-Family Build-to-Rent Segment: Affordable Rentals Drive SFR Performance

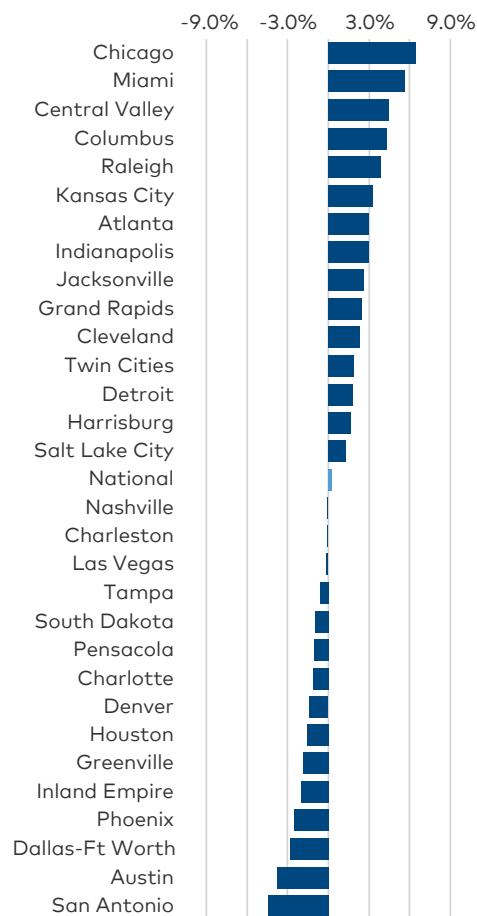
- Nationally, advertised rates for single-family build-to-rent units rose \$6 to \$2,234 in June, up 0.2% year-over-year.
- U.S. single-family rental occupancy rates were solid at 94.7% in June, but down 30 basis points year-over-year. Occupancy was 96.4% for RBN and 94.4% at Lifestyle properties.

The single-family rental sector posted a solid first half of the year, outperforming 2025 despite moderate rent growth. Rents increased 1.1% during the first half, including a 1.0% gain in the second quarter. By comparison, rents rose 0.9% during the first

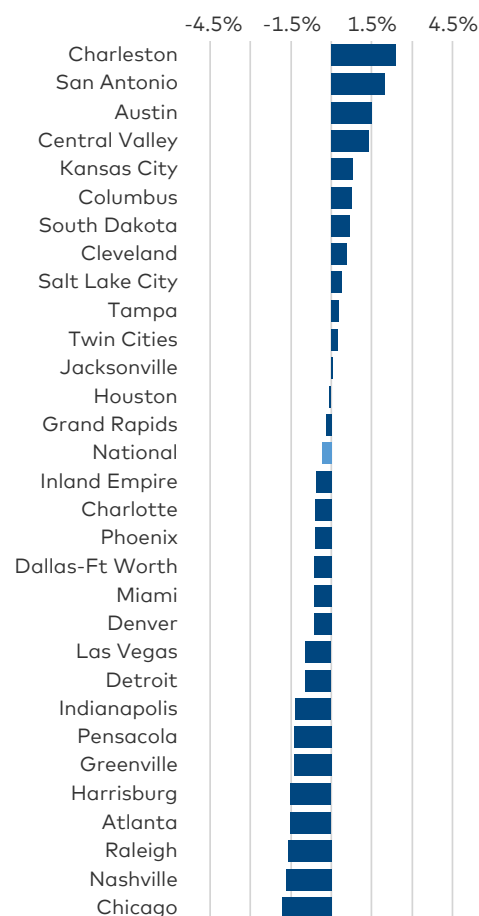
half and 0.7% in the second quarter of 2025. Rent and occupancy performance are both increasingly diverging by product segment. Lifestyle rents declined 0.2% year-over-year, while RBN rents increased 3.3%. In several markets, the spread in year-over-year rent growth exceeds 950 basis points, including Nashville (-0.5% in Lifestyle versus 11.5% in RBN), the Inland Empire (-2.2% versus 11.1%) and Central Valley, Calif. (0.5% versus 10.1%). This widening bifurcation underscores strong demand for more affordable single-family rental homes, even as demand for higher-end units remains strong.

Note: Yardi Matrix covers single-family build-to-rent communities of 50 homes and larger.

**Year-Over-Year Rent Growth—
Single-Family Rentals**



**Year-Over-Year Occupancy Change—
Single-Family Rentals**



Source: Yardi Matrix

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