

Prepared for Davidson
County Ultra-Luxury
Property Owners
Alexander Brandau IV

NASHVILLE ULTRA-LUXURY MARKET 2025 YEAR-END REPORT

A Strategic Market Perspective



A LOOK BACK AT 2025

The Davidson County ultra-luxury market in 2025 was defined by clarity, selectivity, and conviction.

While broader housing headlines often focused on interest rates and uncertainty, the top end of the market told a more nuanced story. Exceptional properties continued to command attention, and well-advised buyers and sellers made deliberate, strategic moves grounded in long-term value rather than short-term sentiment.

This was not a year of excess.

It was a year of intention.



MARKET SNAPSHOT

ACTIVE LISTINGS

155 ultra-luxury properties were active across Davidson County in 2025, offering buyers a meaningful range of choice while reinforcing the importance of differentiation and disciplined pricing.

CLOSED SALES

354 ultra-luxury homes closed during the year, underscoring that liquidity remains very real at the top of the market when value and positioning align.

CLOSED SALES HIGHLIGHTS

Notable Sale Per Month

Each of the following transactions represents the highest recorded sale of its respective month in 2025, highlighting where buyers placed their confidence:

- **January:** 1335 Otter Creek Rd — \$7.35M
- **February:** 515 Church St — \$9.63M
- **March:** 1616 West End Ave — \$7.60M
- **April:** 1314 Page Rd — \$6.85M
- **May:** 1103 Belle Meade Blvd — \$8.00M
- **June:** 404 W Brookfield Ave — \$6.70M
- **July:** 809 Brentview Dr — \$5.87M
- **August:** 5026 Franklin Pike — \$8.45M
- **September:** 1038 Tyne Blvd — \$5.50M
- **October:** 4530 Everett Dr — \$6.03M
- **November:** 225 Wilsonia Ave — \$12.00M
- **December:** 4006 Wayland Dr — \$5.83M

These sales reinforce a consistent theme: when a home offers location, land, design, and long-term relevance, buyers show up.

PRICING BENCHMARKS

- **Average List Price:** Approximately \$4.31M
- **Average Price per Square Foot:** Approximately \$775 per sq ft

These benchmarks continue to place Davidson County among the most compelling ultra-luxury residential markets in the Southeast, particularly in legacy neighborhoods such as Belle Meade, Forest Hills, Green Hills, and Nashville's urban core.

THE ULTRA-LUXURY MARKET, DEFINED

The upper tier of the market is no longer monolithic. It is segmented, selective, and highly discerning.

- Trophy estates and irreplaceable properties continued to achieve strong outcomes, often quietly and efficiently.
- Urban luxury residences remained attractive to buyers prioritizing lifestyle, convenience, and security.
- Aspirational pricing without a clear value story became far less effective, leading to longer market times and strategic repositioning.

In short, buyers are patient, informed, and focused on quality over volume.



2025 IN CONTEXT

This past year rewarded preparation and punished assumption.

Sellers who aligned their pricing with reality and worked with advisors capable of nuance and strategy were successful. Those who chased yesterday's numbers often had to recalibrate.

The broader takeaway is clear: the market did not slow. It refined.



LOOKING AHEAD TO 2026

As we move into 2026, the outlook for Davidson County's ultra-luxury market remains constructive:

- Inventory: Expected to stay elevated, giving buyers leverage and reinforcing the importance of presentation and strategy.
- Pricing: Best-in-class properties should remain resilient, while average assets will need to compete more aggressively.
- Demand: Driven by long-term fundamentals such as corporate presence, cultural relevance, and lifestyle appeal rather than short-term speculation.

Average year-over-year appreciation approached the low-20% range among top-performing properties, with many transactions showing high equity positions and minimal leverage.

WHY LIST WITH Alexander Brandau IV

Nashville's ultra-luxury market has become more selective, and representation matters more than ever. Alexander's disciplined pricing strategy, understanding of buyer behavior, and experience advising top-tier transactions help properties stand out when precision and execution define outcomes.



Whether advising in the Gulch, Midtown, or West End, Alexander and his team take a disciplined, data-informed approach to positioning each property with clarity and precision.

Thinking about a move at this level?

Scan the QR code to request a private consultation and discuss your property's market position.

