

Motor Condos Naples



WheelHouse Jacksonville



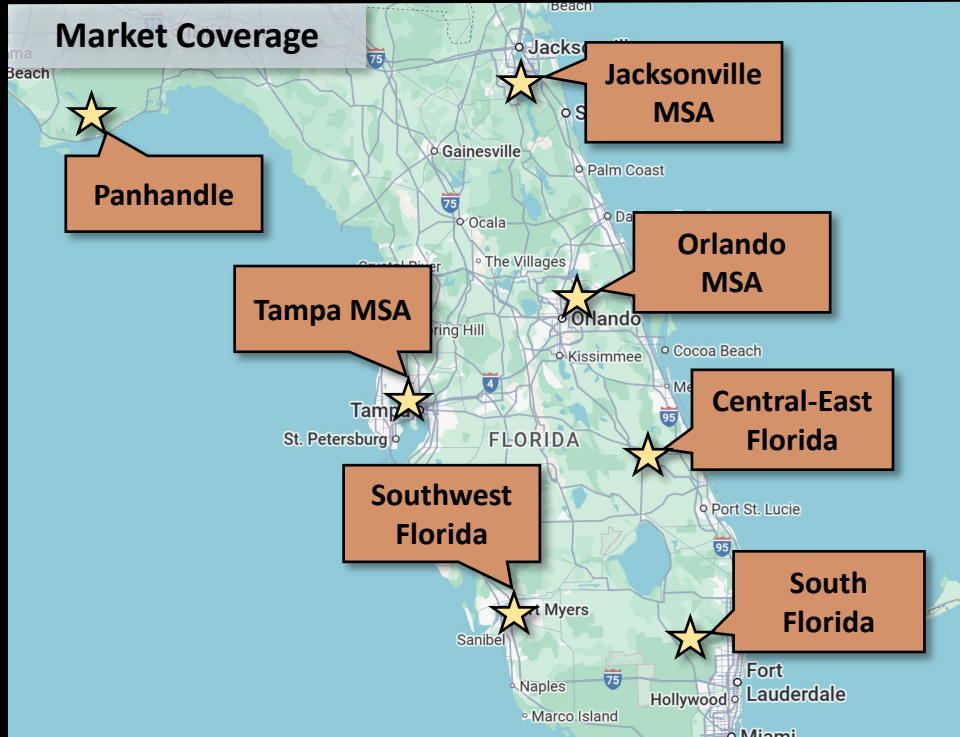
LUXE Dream Garage Sarasota



Paddock1 Tampa



Market Coverage



Storage Condo Market Research

Garage & Car Condo YTD Report – Florida - Q2 2026



**Storage
Condo King**
Market Intelligence

Regional Market Coverage:

- South Florida
- Tampa MSA
- Southwest Florida
- Central-East Florida
- Jacksonville MSA
- Orlando MSA
- Panhandle

LUXURY STORAGE CONDO MARKET

Florida Market Overview

Florida's luxury storage condo market totals 2,067 units across six key regions. Q2 2026 cleared 36 trades at \$530 / SF - up 48% year-over-year - as buyers concentrated into fewer, larger and higher-specification units.

Q2 2026 Market Insights

- **Pricing Acceleration:** Q2 printed \$530 / SF, up from \$410 in Q1 and \$357 a year ago; YTD \$479 / SF (+35%).
- **New Construction Overtakes Re-Sale:** New-build trades cleared \$531 / SF YTD versus \$421 / SF for re-sales, reversing the 2024-25 premium.
- **Track-Side Tier Emerges:** Circuit-anchored product cleared \$640 / SF over the T-12 - 24% of volume.
- **Calusa Capital Partners:** Liquidity across the capital spectrum - banks, debt funds, family offices and CPACE.



Regional Market Coverage



**Storage
Condo King**
Market Intelligence

Online marketplace platform for the luxury storage condo market:

- *Developer Sale Listings*
- *Live sale comps.*
- *Research trends.*
- *Unit market values.*
- *Broker, developer and unit-owner network directory.*
- *Unit underwriting model.*

<https://storagecondoking.com/>

Central-East Florida

Existing Inventory:	8 Projects
Under-Construction:	4 Projects
Avg. Price (T-24):	\$281 PSF

Jacksonville MSA

Existing Inventory:	6 Projects
Under-Construction:	1 Project
Avg. Price (T-24):	\$344 PSF

Orlando MSA

Existing Inventory:	2 Projects
Under-Construction:	1 Project
Avg. Price (T-24):	\$674 PSF

Southwest Florida

Existing Inventory:	19 Projects
Under-Construction:	2 Projects
Avg. Price (T-24):	\$361 PSF

South Florida

Existing Inventory:	6 Projects
Under-Construction:	1 Project
Avg. Price (T-24):	\$480 PSF

Tampa MSA

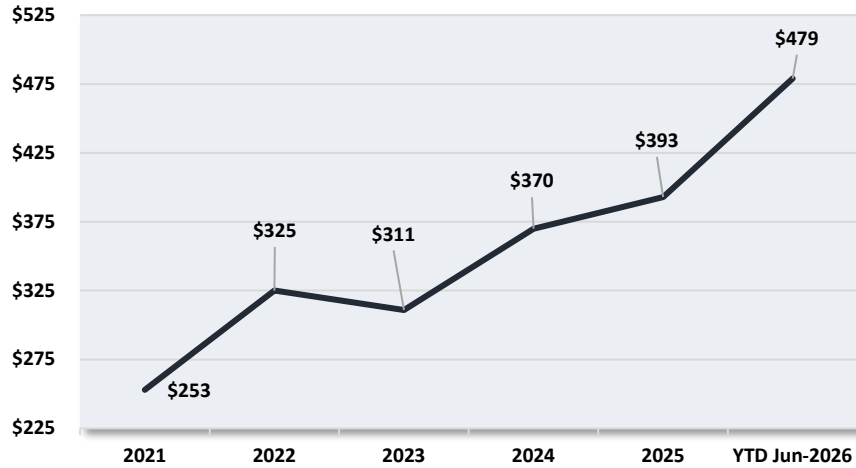
Existing Inventory:	3 Projects
Under-Construction:	0 Projects
Avg. Price (T-24):	\$420 PSF

Panhandle

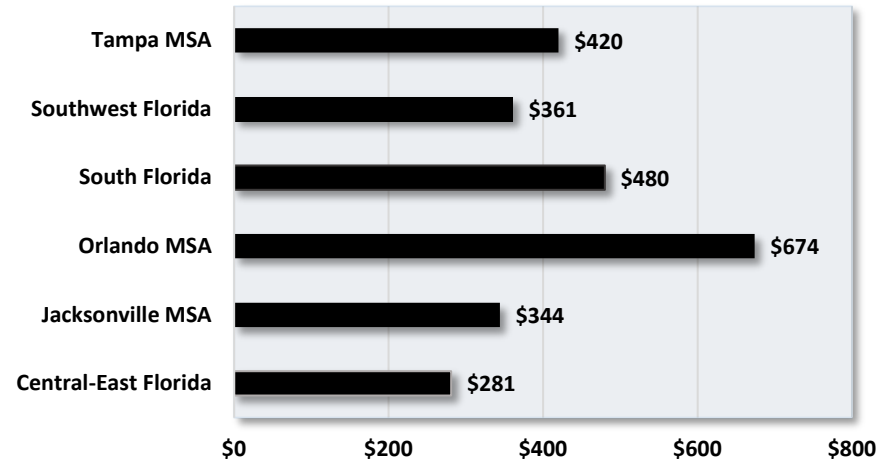
Existing Inventory:	0 Projects
Under-Construction:	0 Projects
Avg. Price (T-24):	N/A



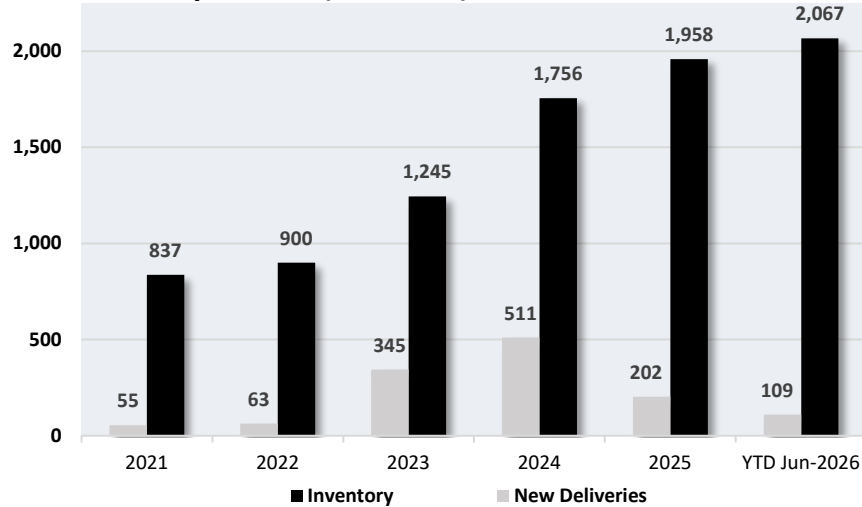
Unit Pricing (Avg. \$ / SF)



Regional Pricing Tiers (\$ / SF)

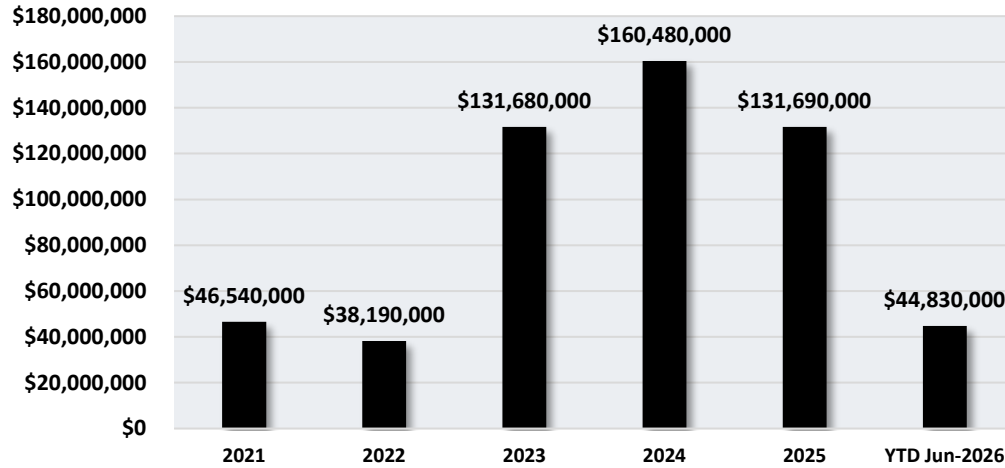


Inventory Growth (# of Units)



LUXURY STORAGE CONDO MARKET

Transaction Velocity (Annual Sales \$)



Year-To-Date Sale Comps

Index	Project Name	Unit	Sale Date	Sale Type	Amenity Tier	Sq. Ft.	\$ / SF	Sale Price	Region	Submarket
1	The Motor Enclave	303	May-26	Re-Sale	Track-Side	1,260	\$794	\$1,000,000	Tampa MSA	Tampa; Brandon
2	Naples Motor Condos - Livingston	506	Mar-26	Re-Sale	Premium-Tier	1,202	\$611	\$735,000	Southwest Florida	Naples; Bonita Springs
3	Naples Motor Condos - Race Track Rd.	205	Apr-26	New Construction	Premium-Tier	1,700	\$566	\$963,000	Southwest Florida	Naples; Bonita Springs
4	Hideout Storage Park (Phase I)	1	Jan-26	Re-Sale	Standard-Tier	1,292	\$503	\$650,000	Southwest Florida	Naples; Bonita Springs
5	Luxe Dream Garage Sarasota	58	Apr-26	Re-Sale	Premium-Tier	1,056	\$483	\$510,000	Southwest Florida	Sarasota; Bradenton
6	Paddock1 Premium Garage Condos	309	Mar-26	Re-Sale	Premium-Tier	1,440	\$417	\$600,000	Tampa MSA	Tampa; Brandon
7	Wheel Base	4	Jan-26	Re-Sale	Premium-Tier	672	\$417	\$280,500	Southwest Florida	Sarasota; Bradenton
8	Motocave Tampa Bay	401	May-26	New Construction	Standard-Tier	960	\$401	\$385,000	Tampa MSA	St. Petersburg; Clearwater
9	Auto Art Gallery	1A	Mar-26	Re-Sale	Standard-Tier	1,704	\$381	\$649,048	Central-East Florida	Stuart; Hobe Sound
10	Eustis Commerce Park	302	Mar-26	Re-Sale	Flex-Tier	1,500	\$233	\$350,000	Orlando MSA	The Villages; Lady Lake

Core Segmentations

Amenity Tier	# Unit Sales	Avg. \$ / Unit	Avg. \$ / SF
Track-Side:	51	\$810,269	\$663
Premium-Tier:	184	\$544,613	\$398
Standard-Tier:	307	\$385,347	\$346
Flex-Tier:	27	\$341,636	\$226
Total / Average:	569	\$472,862	\$386

Unit Size	# Unit Sales	Avg. \$ / Unit	Avg. \$ / SF
0 - 900 SF:	83	\$336,598	\$477
901 - 1,400 SF:	353	\$407,771	\$356
1,400+ SF:	133	\$730,658	\$408
Total / Average:	569	\$472,862	\$386

Sale Type	# Unit Sales	Avg. \$ / Unit	Avg. \$ / SF
New Construction:	301	\$444,416	\$347
Re-Sale:	268	\$504,810	\$429
Total / Average:	569	\$472,862	\$386

Region	# Unit Sales	Avg. \$ / Unit	Avg. \$ / SF
Tampa MSA	124	\$525,151	\$420
Southwest Florida	237	\$458,141	\$361
South Florida	83	\$519,160	\$480
Orlando MSA	12	\$636,208	\$674
Jacksonville MSA	34	\$409,735	\$344
Central-East Florida	79	\$388,664	\$281
Total / Average:	569	\$472,862	\$386

Data Source: Storage Condo King (T-24 Sale Comp Data)

Key Segmentation Insights

- **Amenity Spread:** Track-Side cleared \$640 / SF over the T-12 - 24% of volume on 36 trades - against \$435 Premium and \$242 Flex.
- **Large Units Take Over:** 1,400+ SF now prices at \$486 / SF YTD, above the 0 - 900 SF bucket (\$441), reversing the small-unit premium.
- **New Construction Overtakes Re-Sale:** New-build cleared \$531 / SF YTD versus \$421 for re-sales.
- **Top of Market:** Orlando (\$753) and South Florida (\$592) led the T-12, but on just 7 and 21 trades.
- **Volume Core:** Tampa (\$456) and Southwest Florida (\$428) drove 147 of 220 T-12 trades; Jacksonville (\$321) and Central-East (\$301) anchor the floor.



LUXURY STORAGE CONDO MARKET

Florida Project Pipeline

Only 109 units delivered in H1 2026—half of 2025's full-year pace—but 236 units under construction are due to complete by year-end, concentrating supply into H2.

Pipeline Detail

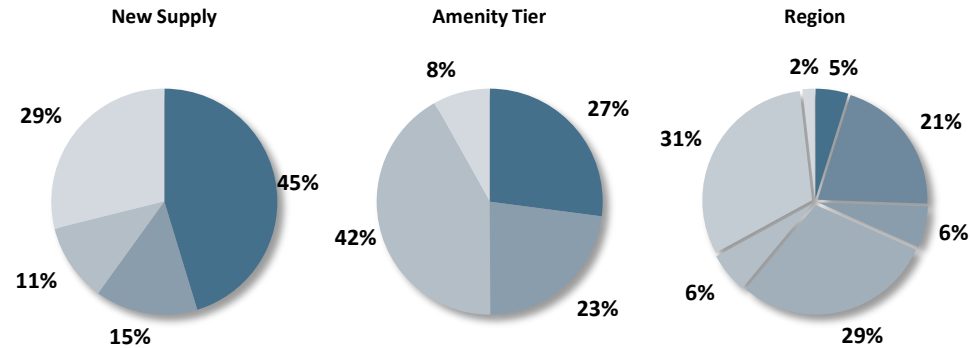
Project Status	# Projects	# Units	% Total
Completed:	44	2067	45%
Under-Construction:	9	669	15%
Developer Sale:	10	510	11%
Pre-Development:	37	1318	29%
Total / Average:	100	4564	100%

Total Supply Detail

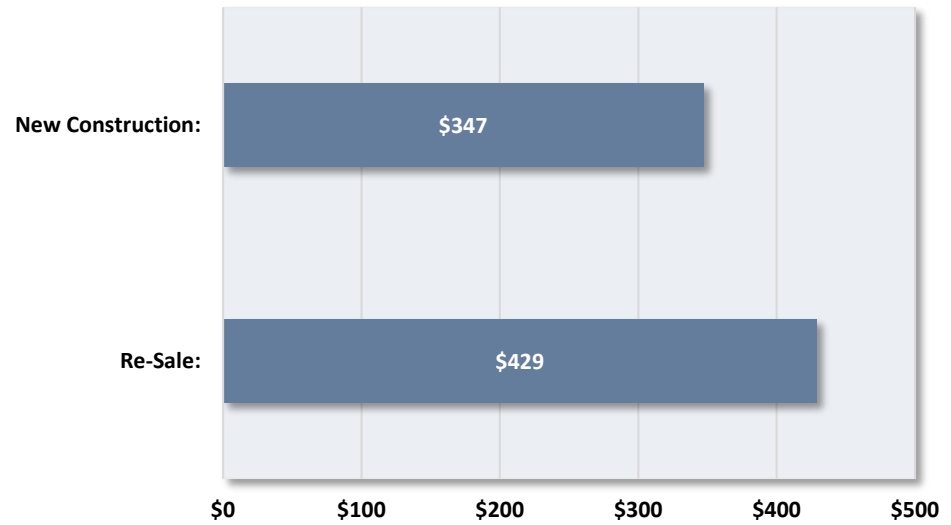
Amenity Tier	# Projects	# Units	% Total
Track-Side:	5	676	27%
Premium-Tier:	18	570	23%
Standard-Tier:	26	1048	42%
Flex-Tier:	7	203	8%
Total / Average:	56	2497	100%

Region	# Projects	# Units	% Total
Jacksonville MSA:	5	121	5%
Orlando MSA:	7	517	21%
Tampa MSA:	4	153	6%
Southwest Florida:	20	733	29%
South Florida:	8	150	6%
Central-East Florida:	10	778	31%
Panhandle:	2	45	2%
Total / Average:	56	2497	100%

Supply Composition (% of Pipeline)



Transaction Pricing Tiers (\$ / SF)

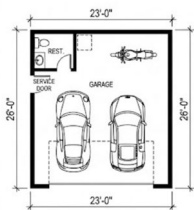


Amenity-Tier Segmentation

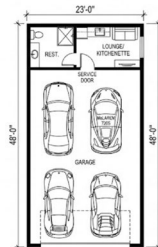
- **Track-Side:** Circuit-anchored product with garage suites fronting a private track with paddock access, track-day programming and hospitality lounges.
- **Premium-Tier:** Lifestyle-oriented product featuring luxury finishes, tilt-wall construction and full amenity packages — owners' clubhouses, social programming, and concierge services.
- **Standard-Tier:** "Country Club Lite" experience balancing functional luxury with mezzanine capabilities, private bathrooms, and wash bays—targeting buyers seeking upgraded finishes without full hospitality programming.
- **Flex-Tier:** Value-oriented product for functional users prioritizing storage capacity over lifestyle amenities, featuring metal/block construction and essential features.

Unit-Mix Segmentation

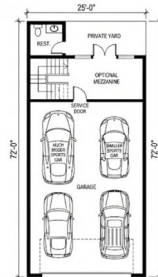
Unit Type	Small Units	Medium Units	Large Units
Size Range:	0 – 900 SF	901 – 1,400 SF	1,400+ SF
% Total:	23%	52%	25%



Small
Unit Size: 600 SF

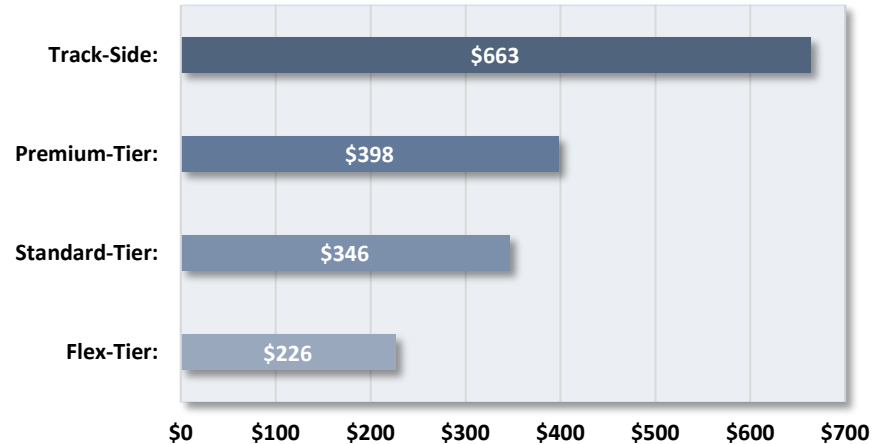


Medium
Unit Size: 1,100 SF



Large
Unit Size: 1,800 SF

Amenity Pricing Tiers (\$ / SF)



Unit-Mix Pricing Tiers (\$ / SF)

