

# Monthly Indicators



## December 2025

U.S. existing home sales ticked up 0.5% from the previous month to a seasonally adjusted annual rate of 4.13 million, marking the third consecutive monthly increase, according to the National Association of REALTORS® (NAR). However, sales were down 1.0% from the same period last year. Regionally, sales rose month-over-month in the Northeast and South, were unchanged in the West, and declined in the Midwest. On a year-over-year basis, sales were flat in the Northeast and South and fell in both the Midwest and West.

New Listings increased 12.7 percent for Single-Family homes and 13.3 percent for Condo homes. Pending Sales increased 1.9 percent for Single-Family homes and 20.1 percent for Condo homes. Inventory decreased 0.4 percent for Single-Family homes but increased 5.5 percent for Condo homes.

Median Sales Price increased 3.4 percent to \$368,988 for Single-Family homes but decreased 4.5 percent to \$235,000 for Condo homes. Days on Market decreased 1.5 percent for Single-Family homes but increased 4.1 percent for Condo homes. Months Supply of Inventory decreased 2.6 percent for Single-Family homes but increased 7.7 percent for Condo homes.

The national median existing-home price continued to climb, rising 1.2% from a year ago to \$409,200, according to NAR. This year-over-year increase—the 29th consecutive monthly gain—reflects ongoing tightness in housing supply. At the end of November, there were 1.43 million units for sale, down 5.9% from the previous month but up 7.5% from the same time last year, representing a 4.2-month supply at the current sales pace.

## Quick Facts

<b>+ 10.3%</b>	<b>+ 12.2%</b>	<b>+ 6.5%</b>
Change in <b>Closed Sales</b> All Properties	Change in <b>Closed Sales</b> Single-Family Only	Change in <b>Closed Sales</b> Condo Only

A research tool provided by the Coastal Carolinas Association of REALTORS®. Percent changes are calculated using rounded figures.

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# Single Family Market Overview

Key market metrics for the current month and year-to-date figures. Single-family homes only.



Key Metrics	Historical Sparkbars	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		773	871	+ 12.7%	14,317	15,401	+ 7.6%
Pending Sales		639	651	+ 1.9%	10,815	11,039	+ 2.1%
Closed Sales		859	964	+ 12.2%	10,806	11,196	+ 3.6%
Days on Market Until Sale		130	128	- 1.5%	121	123	+ 1.7%
Median Sales Price		\$357,000	\$368,988	+ 3.4%	\$360,000	\$365,000	+ 1.4%
Average Sales Price		\$433,401	\$470,239	+ 8.5%	\$434,961	\$442,352	+ 1.7%
Percent of List Price Received		97.1%	97.2%	+ 0.1%	97.4%	97.3%	- 0.1%
Housing Affordability Index		75	76	+ 1.3%	74	77	+ 4.1%
Inventory of Homes for Sale		3,428	3,416	- 0.4%	—	—	—
Months Supply of Inventory		3.8	3.7	- 2.6%	—	—	—

# Condo Market Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Condo properties only.



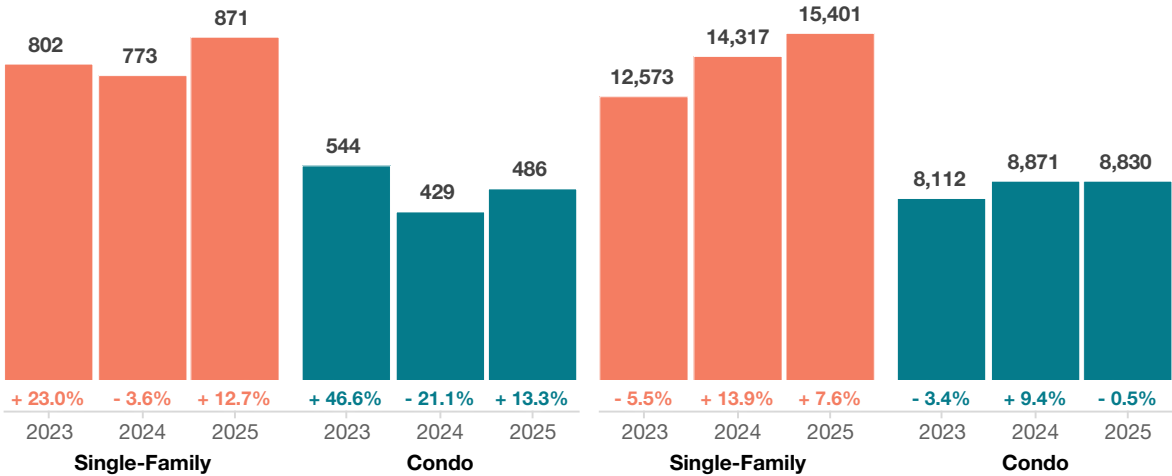
Key Metrics	Historical Sparkbars	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		429	486	+ 13.3%	8,871	8,830	- 0.5%
Pending Sales		264	317	+ 20.1%	5,078	4,962	- 2.3%
Closed Sales		383	408	+ 6.5%	5,079	4,924	- 3.1%
Days on Market Until Sale		123	128	+ 4.1%	111	132	+ 18.9%
Median Sales Price		\$245,985	\$235,000	- 4.5%	\$248,000	\$238,825	- 3.7%
Average Sales Price		\$286,484	\$260,595	- 9.0%	\$286,099	\$272,451	- 4.8%
Percent of List Price Received		96.4%	96.0%	- 0.4%	96.6%	96.1%	- 0.5%
Housing Affordability Index		108	120	+ 11.1%	107	118	+ 10.3%
Inventory of Homes for Sale		2,730	2,881	+ 5.5%	—	—	—
Months Supply of Inventory		6.5	7.0	+ 7.7%	—	—	—

# New Listings

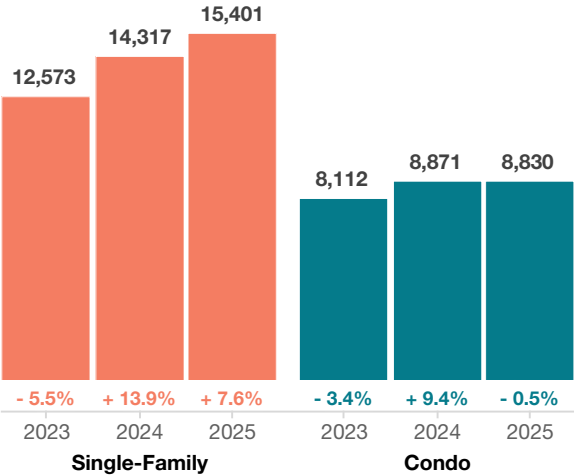
A count of the properties that have been newly listed on the market in a given month.



## December

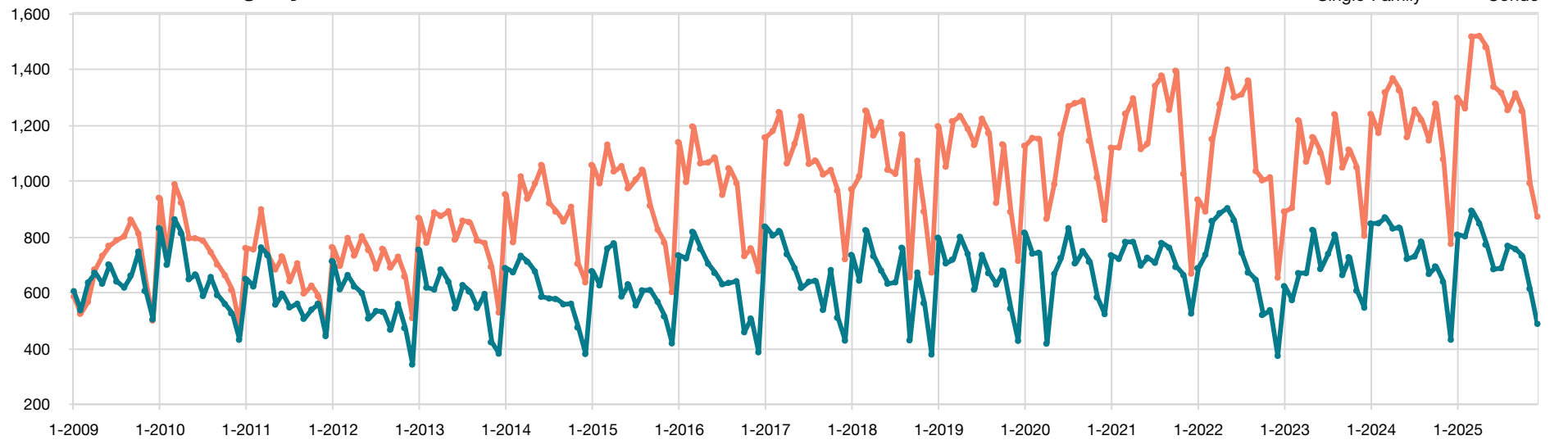


## Year to Date



New Listings	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	1,297	+ 4.7%	806	- 4.7%
Feb-2025	1,259	+ 7.5%	800	- 5.5%
Mar-2025	1,517	+ 15.2%	892	+ 2.8%
Apr-2025	1,519	+ 11.1%	846	+ 2.2%
May-2025	1,479	+ 11.7%	770	- 7.3%
Jun-2025	1,337	+ 15.7%	682	- 5.1%
Jul-2025	1,315	+ 4.8%	686	- 5.8%
Aug-2025	1,253	+ 2.9%	766	- 1.9%
Sep-2025	1,313	+ 14.8%	754	+ 13.4%
Oct-2025	1,250	- 2.0%	730	+ 5.5%
Nov-2025	991	- 8.0%	612	- 3.9%
<b>Dec-2025</b>	<b>871</b>	<b>+ 12.7%</b>	<b>486</b>	<b>+ 13.3%</b>
12-Month Avg	1,283	+ 7.5%	736	- 0.4%

## Historical New Listings by Month

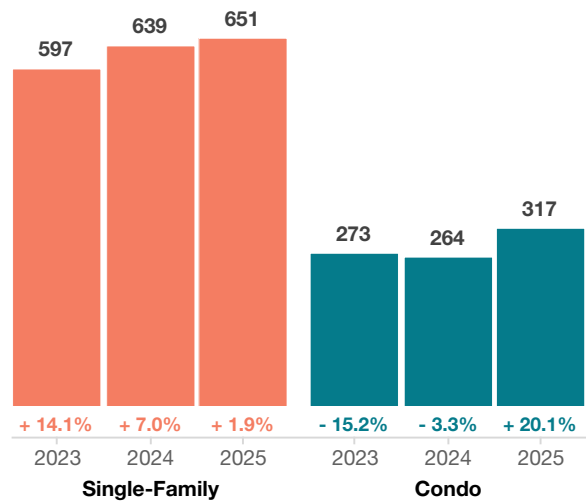


# Pending Sales

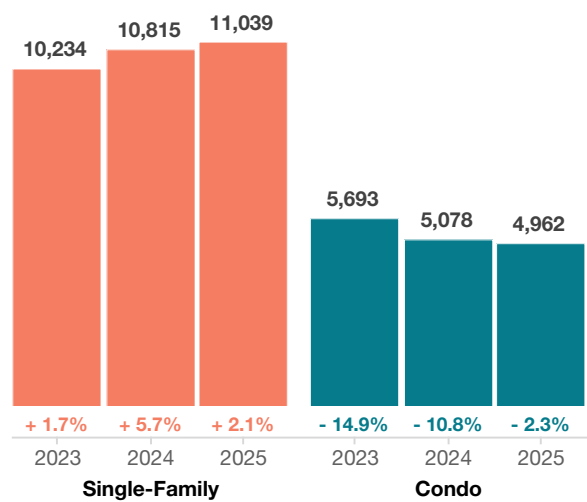
A count of the properties on which offers have been accepted in a given month.



## December

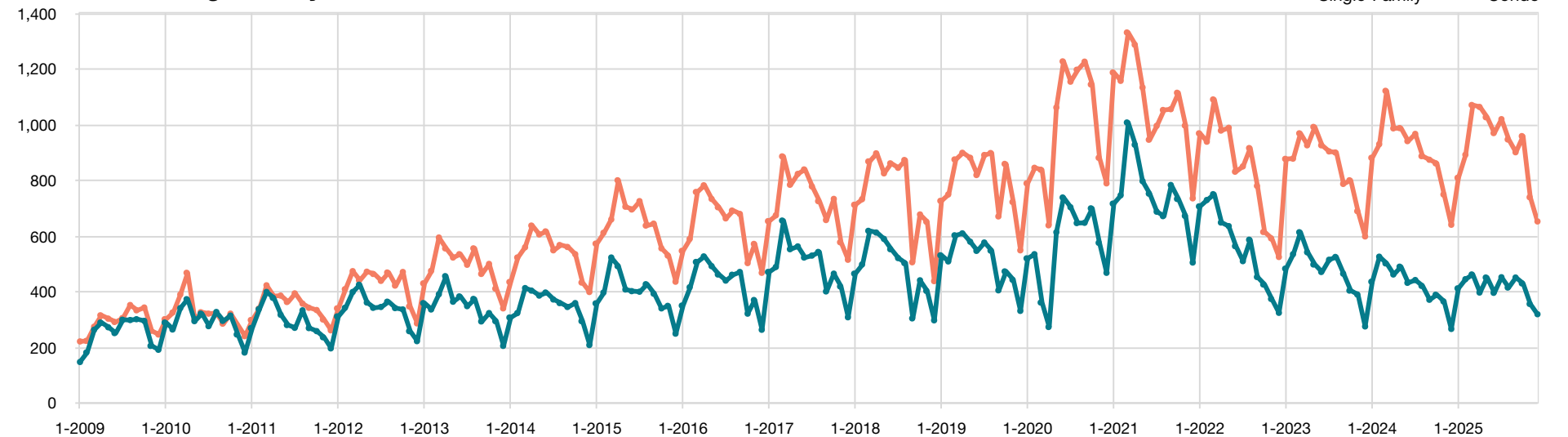


## Year to Date



Pending Sales	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	808	- 8.2%	410	- 5.5%
Feb-2025	891	- 4.1%	443	- 15.5%
Mar-2025	1,070	- 4.5%	460	- 8.0%
Apr-2025	1,063	+ 7.8%	395	- 14.1%
May-2025	1,026	+ 4.0%	449	- 8.0%
Jun-2025	969	+ 3.1%	394	- 8.4%
Jul-2025	1,019	+ 5.5%	450	+ 2.3%
Aug-2025	946	+ 6.8%	413	- 1.4%
Sep-2025	900	+ 3.1%	449	+ 21.7%
Oct-2025	958	+ 11.4%	428	+ 10.6%
Nov-2025	738	- 1.3%	354	- 2.5%
Dec-2025	651	+ 1.9%	317	+ 20.1%
12-Month Avg	920	+ 2.1%	414	- 2.1%

## Historical Pending Sales by Month

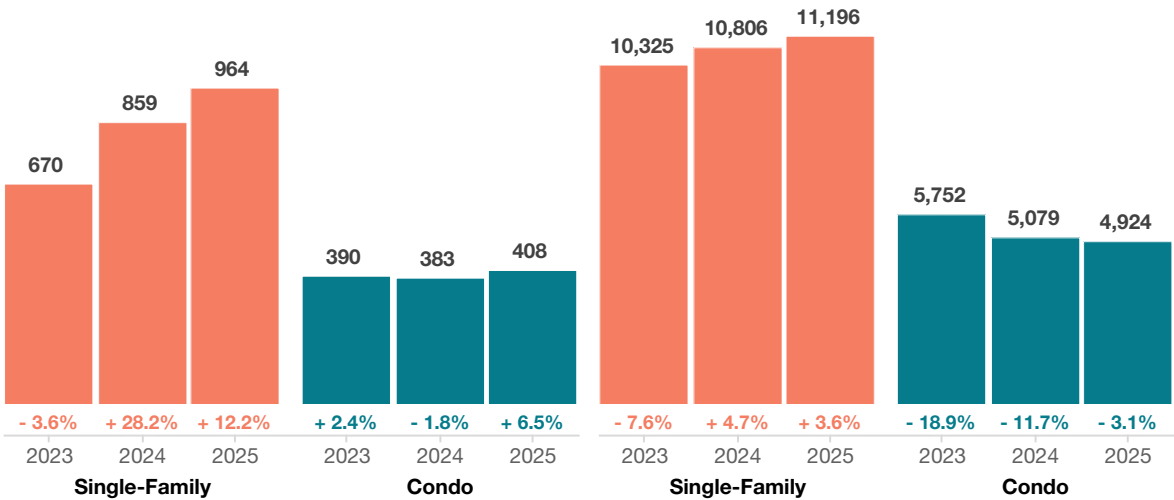


# Closed Sales

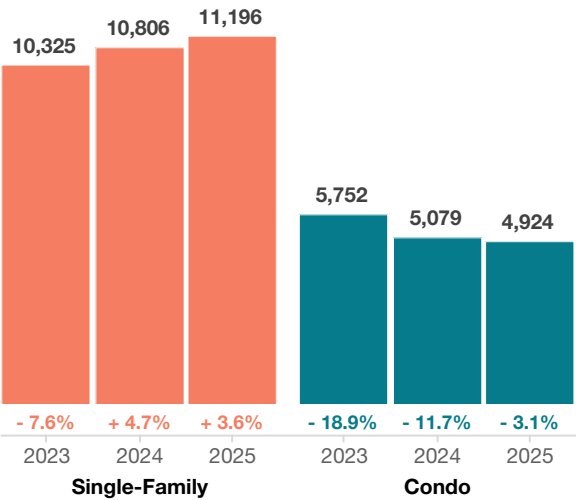
A count of the actual sales that closed in a given month.



## December

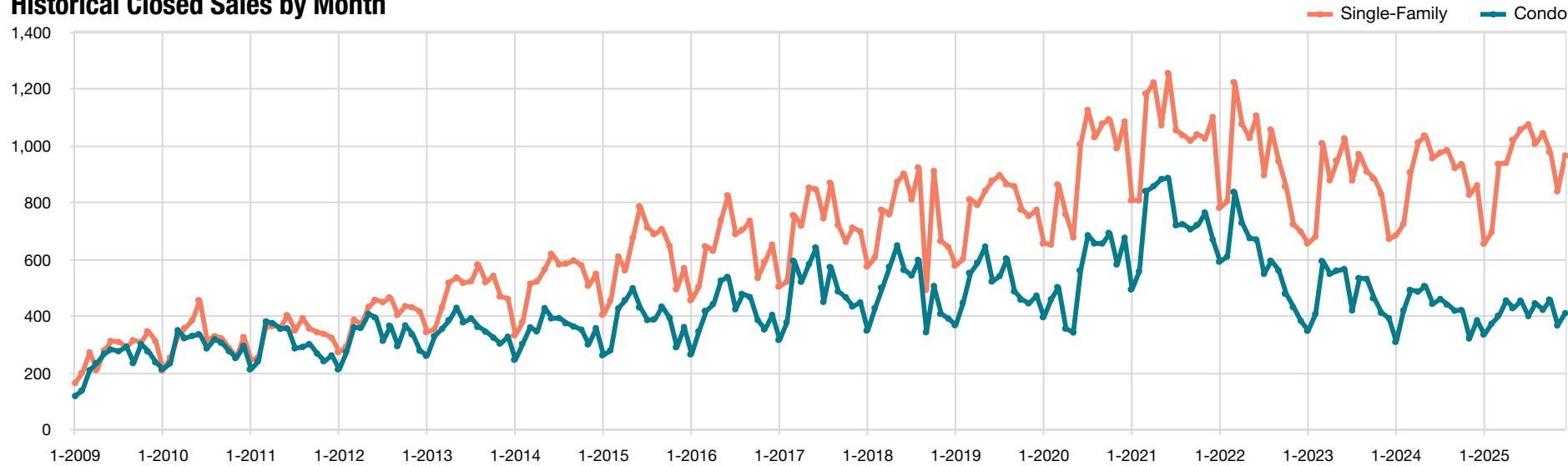


## Year to Date



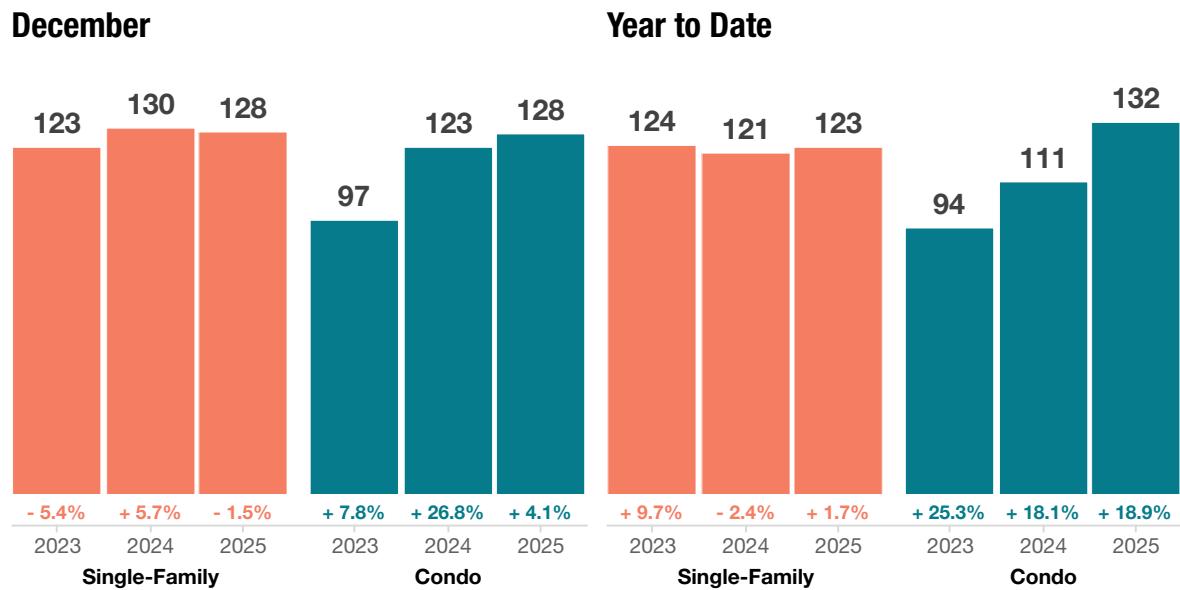
Closed Sales	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	653	- 4.3%	333	+ 8.5%
Feb-2025	694	- 4.0%	371	- 11.2%
Mar-2025	935	+ 3.3%	399	- 18.6%
Apr-2025	938	- 7.1%	453	- 6.4%
May-2025	1,019	- 1.5%	426	- 15.5%
Jun-2025	1,056	+ 10.6%	452	+ 2.5%
Jul-2025	1,074	+ 10.3%	398	- 13.1%
Aug-2025	1,005	+ 2.2%	443	+ 0.9%
Sep-2025	1,043	+ 13.4%	420	+ 0.7%
Oct-2025	977	+ 4.6%	456	+ 8.8%
Nov-2025	838	+ 1.5%	365	+ 14.4%
Dec-2025	964	+ 12.2%	408	+ 6.5%
12-Month Avg	933	+ 3.6%	410	- 3.1%

## Historical Closed Sales by Month



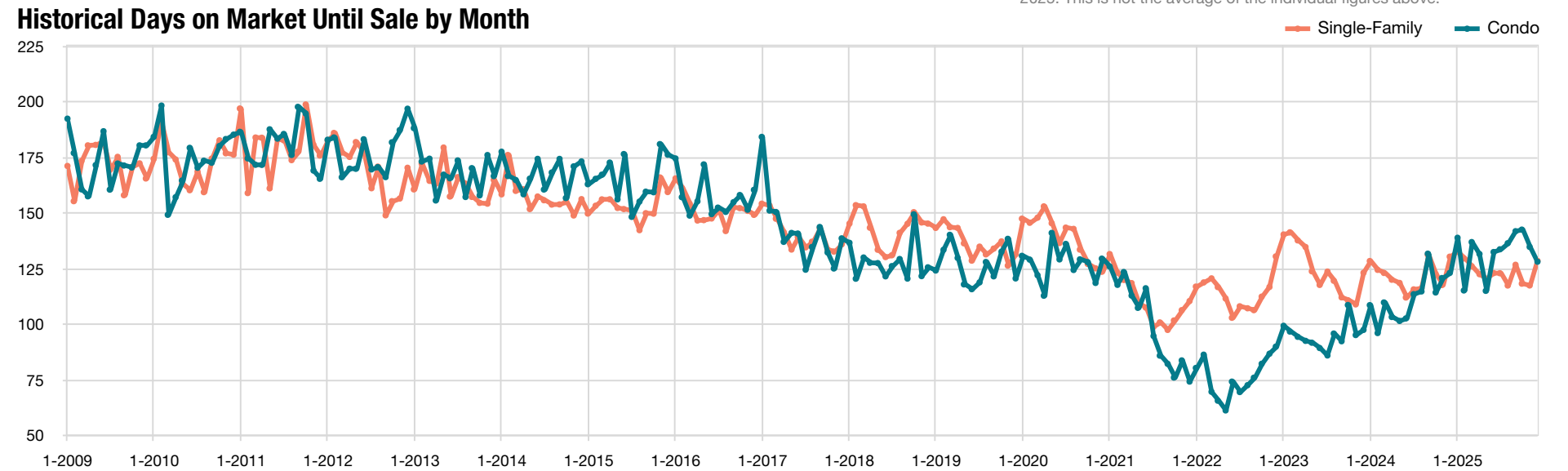
# Days on Market Until Sale

Average number of days between when a property is listed and when an offer is accepted in a given month.



Days on Market	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	132	+ 3.1%	139	+ 28.7%
Feb-2025	129	+ 4.0%	115	+ 19.8%
Mar-2025	126	+ 2.4%	137	+ 24.5%
Apr-2025	122	+ 1.7%	131	+ 27.2%
May-2025	120	+ 1.7%	115	+ 13.9%
Jun-2025	123	+ 9.8%	132	+ 29.4%
Jul-2025	123	+ 7.0%	133	+ 17.7%
Aug-2025	117	+ 0.9%	136	+ 19.3%
Sep-2025	126	- 3.8%	142	+ 8.4%
Oct-2025	118	- 3.3%	142	+ 24.6%
Nov-2025	117	0.0%	135	+ 11.6%
<b>Dec-2025</b>	<b>128</b>	<b>- 1.5%</b>	<b>128</b>	<b>+ 4.1%</b>
12-Month Avg*	123	+ 1.7%	132	+ 19.2%

\* Days on Market for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

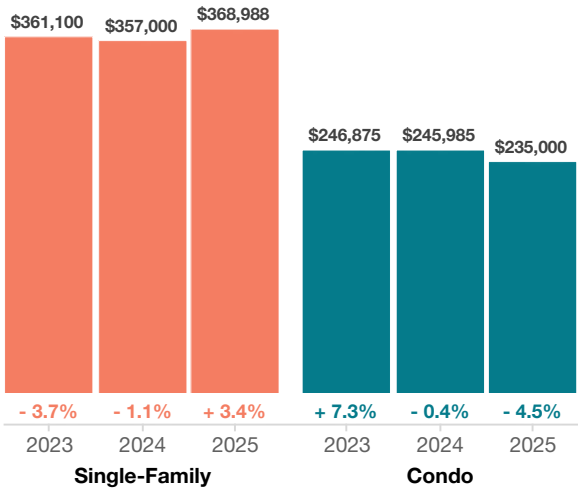


# Median Sales Price

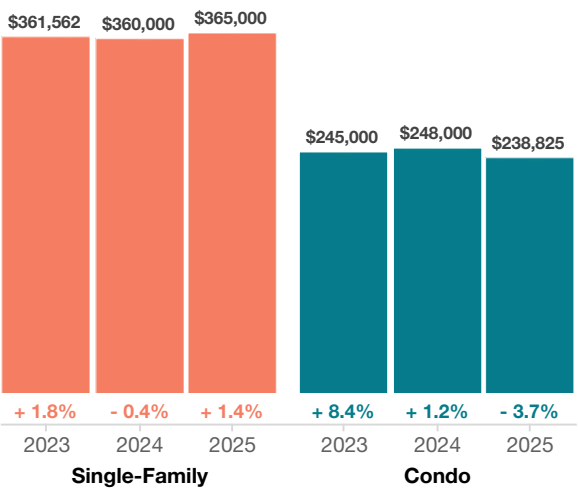
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



## December



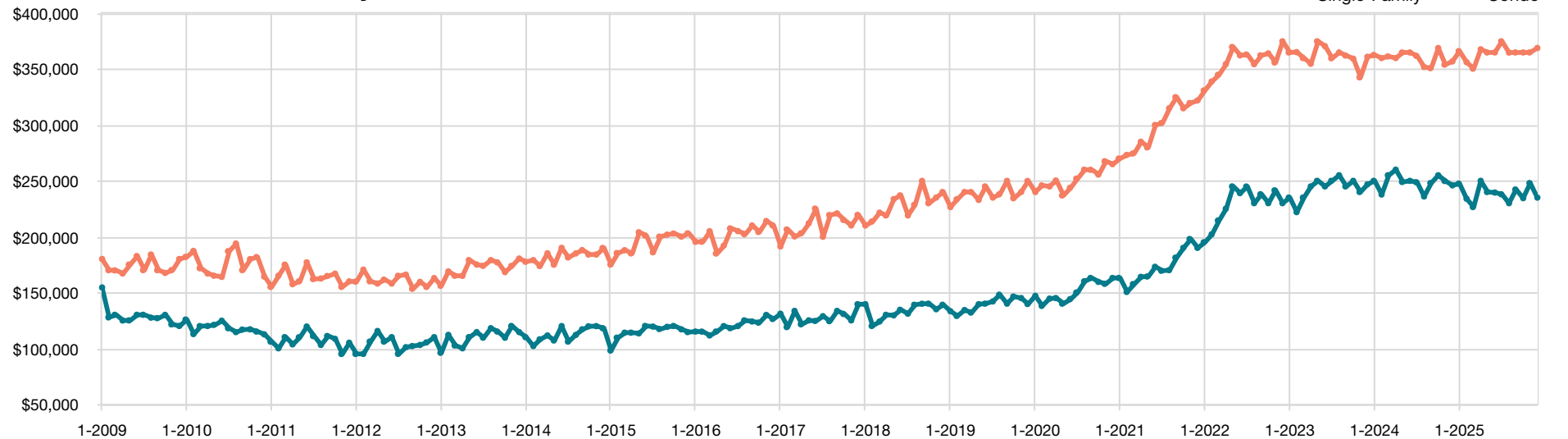
## Year to Date



Median Sales Price	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	\$366,200	+ 0.9%	\$247,500	- 1.0%
Feb-2025	\$356,350	- 1.0%	\$234,000	- 1.6%
Mar-2025	\$350,490	- 3.0%	\$226,500	- 11.2%
Apr-2025	\$367,850	+ 2.2%	\$249,999	- 3.8%
May-2025	\$365,000	0.0%	\$240,000	- 3.6%
Jun-2025	\$365,000	0.0%	\$239,500	- 4.2%
Jul-2025	\$374,995	+ 3.6%	\$238,000	- 4.3%
Aug-2025	\$364,900	+ 3.7%	\$230,000	- 2.5%
Sep-2025	\$365,000	+ 4.0%	\$242,250	- 2.3%
Oct-2025	\$365,000	- 1.1%	\$234,500	- 8.0%
Nov-2025	\$365,000	+ 3.1%	\$248,000	- 0.8%
Dec-2025	\$368,988	+ 3.4%	\$235,000	- 4.5%
12-Month Avg*	\$365,000	+ 1.4%	\$238,825	- 3.7%

\* Median Sales Price for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

## Historical Median Sales Price by Month



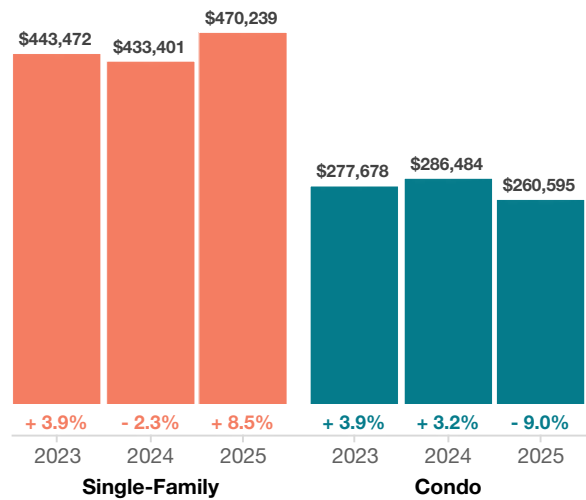


# Average Sales Price

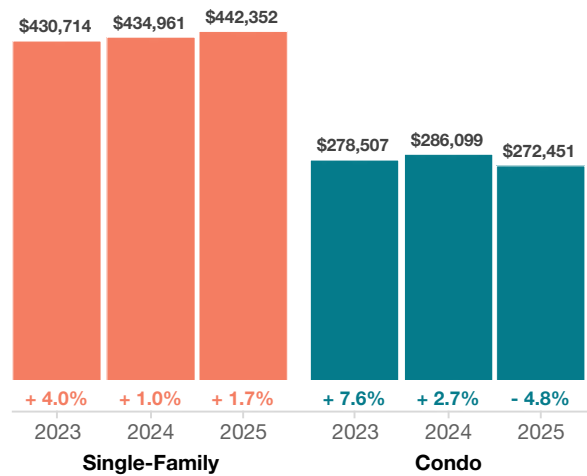
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



## December



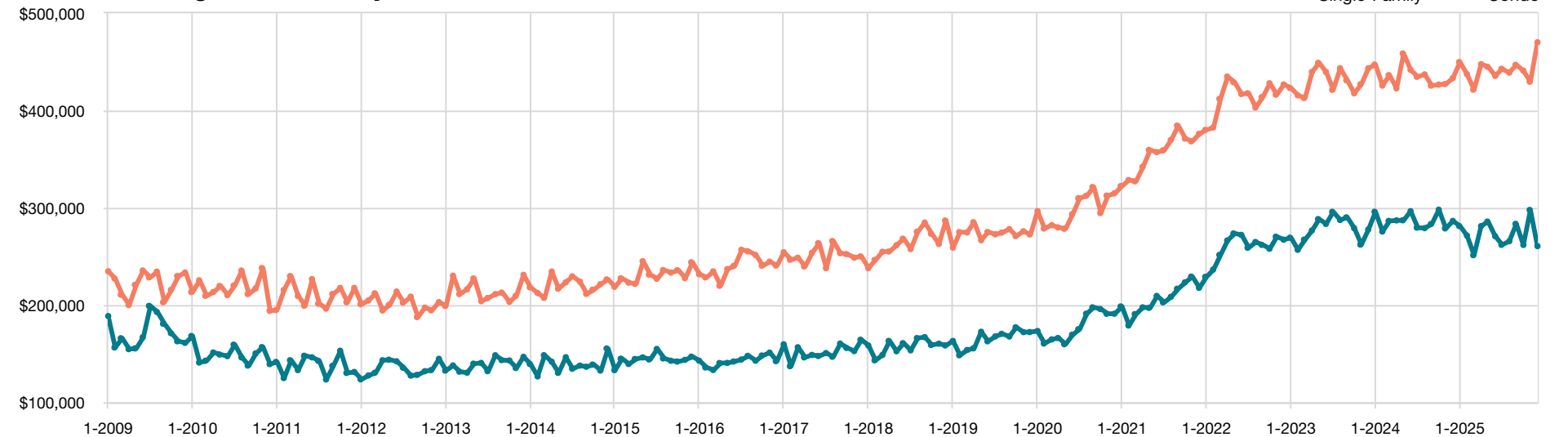
## Year to Date



Avg. Sales Price	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	\$449,919	+ 0.6%	\$281,284	- 4.9%
Feb-2025	\$437,373	+ 2.7%	\$271,421	- 1.5%
Mar-2025	\$421,484	- 3.4%	\$251,284	- 12.3%
Apr-2025	\$447,711	+ 5.9%	\$281,183	- 2.0%
May-2025	\$445,112	- 3.0%	\$285,778	- 0.5%
Jun-2025	\$435,702	- 1.4%	\$270,796	- 8.7%
Jul-2025	\$442,950	+ 1.9%	\$261,960	- 6.3%
Aug-2025	\$439,007	+ 0.4%	\$265,618	- 4.8%
Sep-2025	\$447,042	+ 5.0%	\$283,504	+ 0.1%
Oct-2025	\$441,072	+ 3.4%	\$261,819	- 12.1%
Nov-2025	\$429,688	+ 0.6%	\$297,792	+ 6.8%
<b>Dec-2025</b>	<b>\$470,239</b>	<b>+ 8.5%</b>	<b>\$260,595</b>	<b>- 9.0%</b>
12-Month Avg*	\$442,352	+ 1.7%	\$272,451	- 4.8%

\* Avg. Sales Price for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

## Historical Average Sales Price by Month



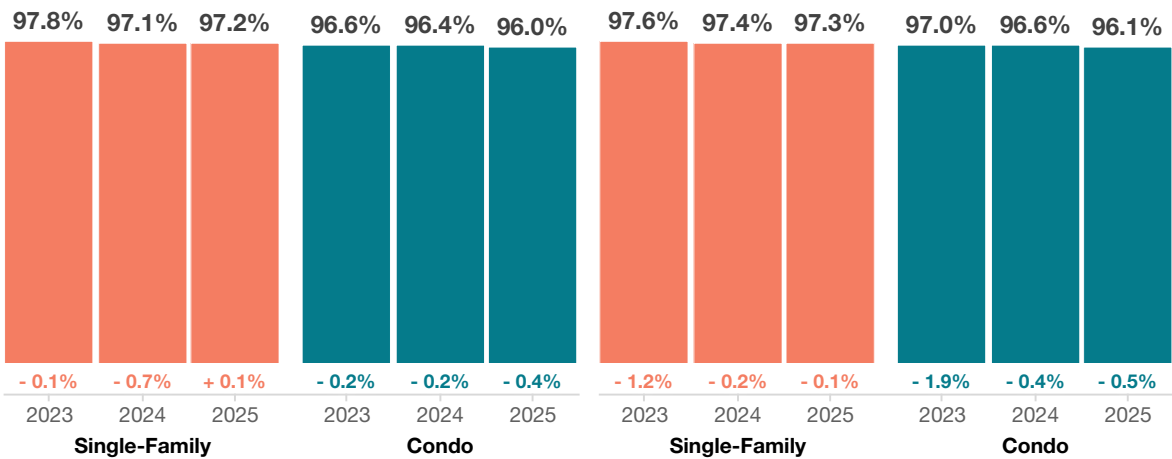
# Percent of List Price Received

Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



## December

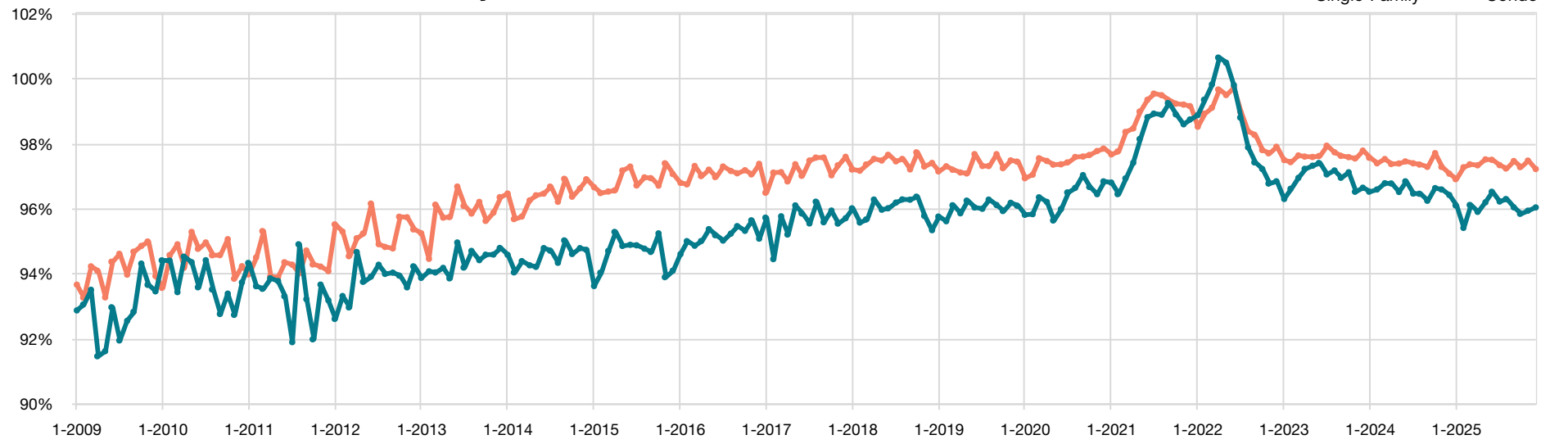
## Year to Date



Pct. of List Price Received	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	96.9%	- 0.7%	96.1%	- 0.4%
Feb-2025	97.3%	- 0.1%	95.4%	- 1.2%
Mar-2025	97.4%	- 0.1%	96.1%	- 0.7%
Apr-2025	97.3%	- 0.1%	95.9%	- 0.9%
May-2025	97.5%	+ 0.1%	96.2%	- 0.3%
Jun-2025	97.5%	+ 0.1%	96.5%	- 0.3%
Jul-2025	97.3%	- 0.1%	96.2%	- 0.3%
Aug-2025	97.2%	- 0.1%	96.3%	- 0.1%
Sep-2025	97.5%	+ 0.2%	96.0%	- 0.2%
Oct-2025	97.3%	- 0.4%	95.8%	- 0.8%
Nov-2025	97.5%	+ 0.2%	95.9%	- 0.7%
<b>Dec-2025</b>	<b>97.2%</b>	<b>+ 0.1%</b>	<b>96.0%</b>	<b>- 0.4%</b>
12-Month Avg*	97.3%	- 0.1%	96.1%	- 0.5%

\* Pct. of List Price Received for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

## Historical Percent of List Price Received by Month



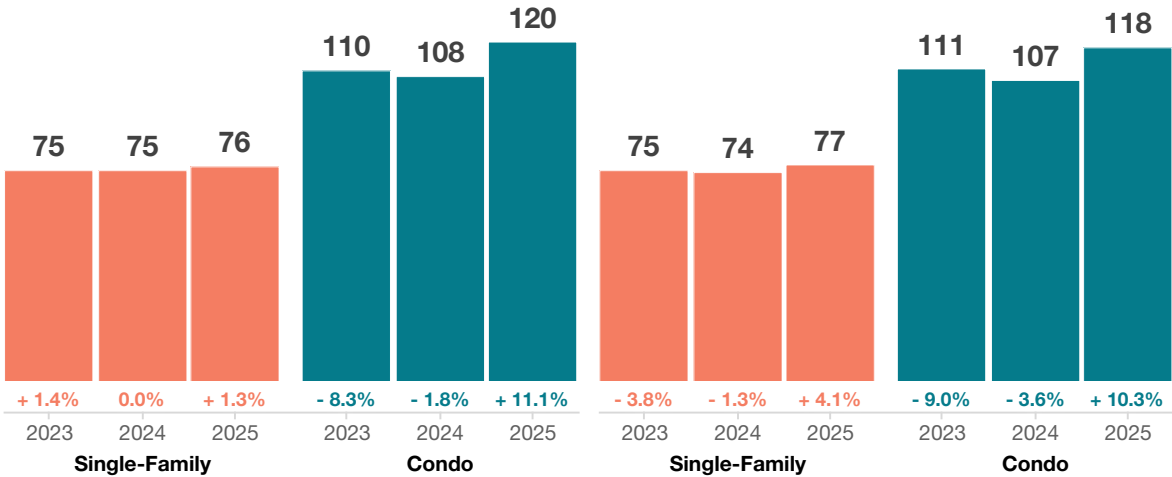
# Housing Affordability Index

This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



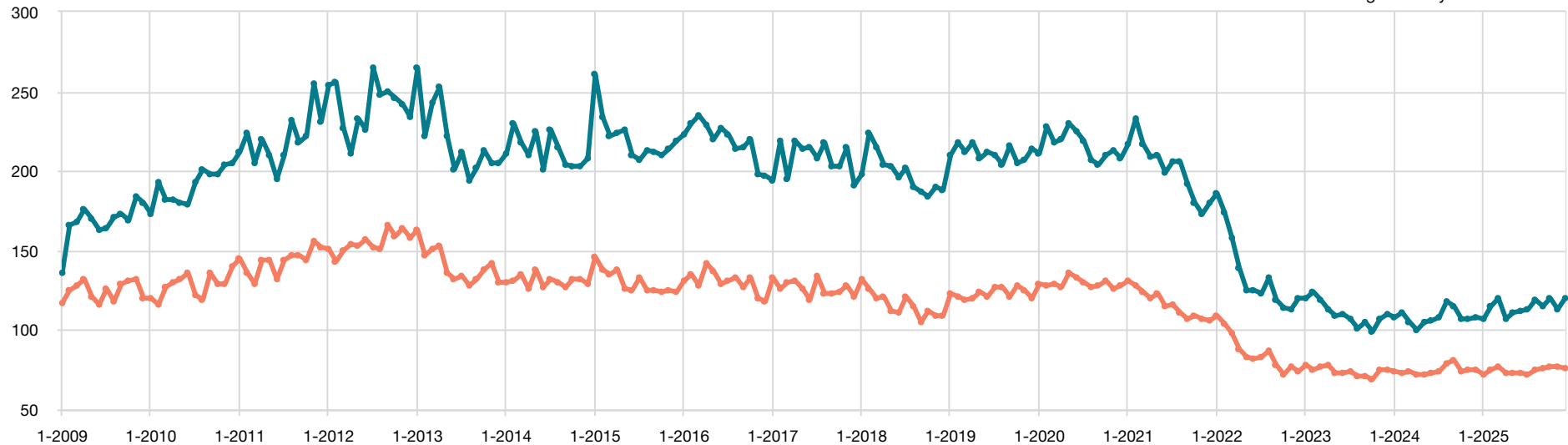
## December

## Year to Date



Affordability Index	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	72	- 2.7%	107	- 0.9%
Feb-2025	75	+ 2.7%	115	+ 3.6%
Mar-2025	77	+ 4.1%	120	+ 14.3%
Apr-2025	73	+ 1.4%	107	+ 7.0%
May-2025	73	+ 1.4%	111	+ 5.7%
Jun-2025	73	0.0%	112	+ 5.7%
Jul-2025	72	- 2.7%	113	+ 4.6%
Aug-2025	75	- 5.1%	119	+ 0.8%
Sep-2025	76	- 6.2%	115	0.0%
Oct-2025	77	+ 4.1%	120	+ 12.1%
Nov-2025	77	+ 2.7%	113	+ 5.6%
Dec-2025	76	+ 1.3%	120	+ 11.1%
12-Month Avg	75	0.0%	114	+ 5.6%

## Historical Housing Affordability Index by Month

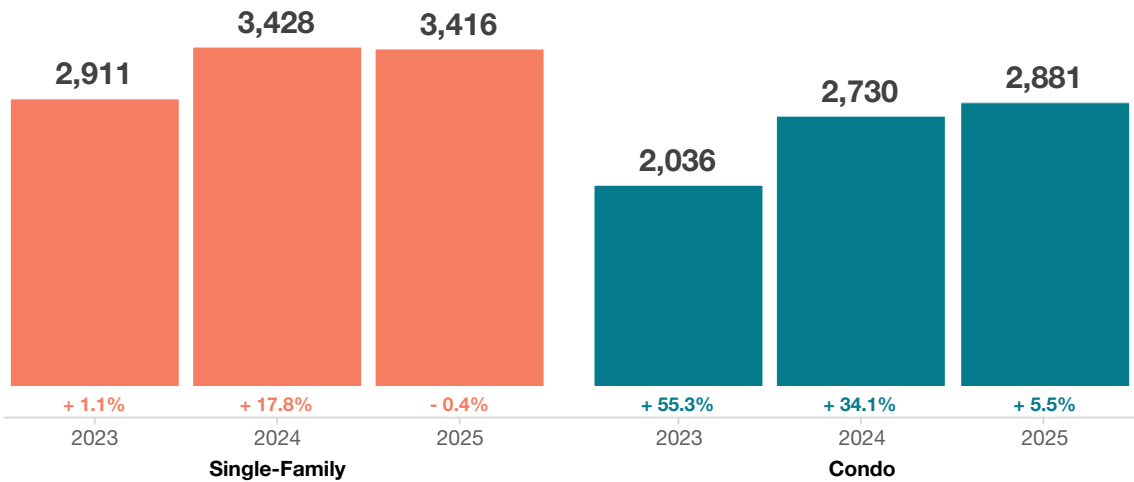


# Inventory of Homes for Sale

The number of properties available for sale in active status at the end of a given month.

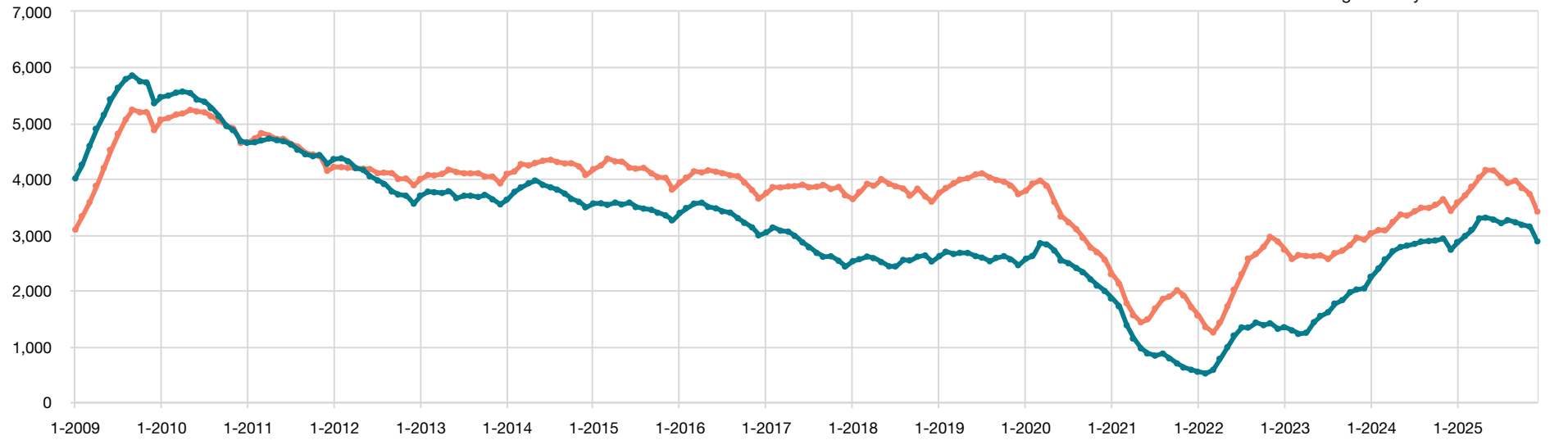


## December



Homes for Sale	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	3,578	+ 18.3%	2,866	+ 27.7%
Feb-2025	3,705	+ 20.2%	2,976	+ 24.3%
Mar-2025	3,858	+ 25.3%	3,085	+ 20.6%
Apr-2025	4,027	+ 24.8%	3,293	+ 21.8%
May-2025	4,161	+ 23.8%	3,305	+ 19.0%
Jun-2025	4,152	+ 24.2%	3,270	+ 16.6%
Jul-2025	4,024	+ 17.7%	3,207	+ 13.1%
Aug-2025	3,927	+ 12.7%	3,260	+ 13.4%
Sep-2025	3,969	+ 14.1%	3,222	+ 11.6%
Oct-2025	3,838	+ 8.5%	3,176	+ 9.7%
Nov-2025	3,729	+ 2.5%	3,146	+ 7.3%
Dec-2025	3,416	- 0.4%	2,881	+ 5.5%
12-Month Avg	3,865	+ 15.6%	3,141	+ 15.5%

## Historical Inventory of Homes for Sale by Month

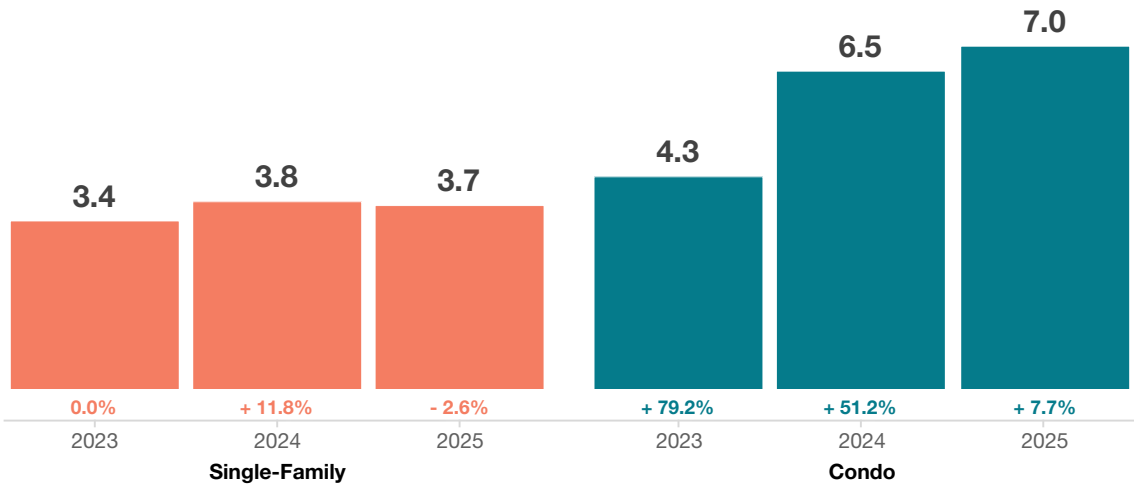


# Months Supply of Inventory

The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.



## December



Months Supply	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	4.0	+ 14.3%	6.8	+ 41.7%
Feb-2025	4.2	+ 16.7%	7.2	+ 41.2%
Mar-2025	4.3	+ 22.9%	7.5	+ 33.9%
Apr-2025	4.5	+ 21.6%	8.1	+ 35.0%
May-2025	4.6	+ 21.1%	8.2	+ 34.4%
Jun-2025	4.6	+ 21.1%	8.2	+ 32.3%
Jul-2025	4.4	+ 12.8%	8.0	+ 25.0%
Aug-2025	4.3	+ 7.5%	8.2	+ 24.2%
Sep-2025	4.4	+ 12.8%	7.9	+ 16.2%
Oct-2025	4.2	+ 5.0%	7.7	+ 13.2%
Nov-2025	4.1	0.0%	7.7	+ 11.6%
Dec-2025	3.7	- 2.6%	7.0	+ 7.7%
12-Month Avg*	4.3	+ 12.5%	7.7	+ 25.6%

\* Months Supply for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

## Historical Months Supply of Inventory by Month

