

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

+ 10.3%

Change in
Closed Sales
All Properties

+ 12.2%

Change in
Closed Sales
Single-Family Only

+ 6.5%

Change in
Closed Sales
Condo Only

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

Single Family Market Overview	2
Condo Market Overview	3
New Listings	4
Pending Sales	5
Closed Sales	6
Days on Market Until Sale	7
Median Sales Price	8
Average Sales Price	9
Percent of List Price Received	10
Housing Affordability Index	11
Inventory of Homes for Sale	12
Months Supply of Inventory	13



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
	12-2023	6-2024	12-2024	6-2025	12-2025						
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.



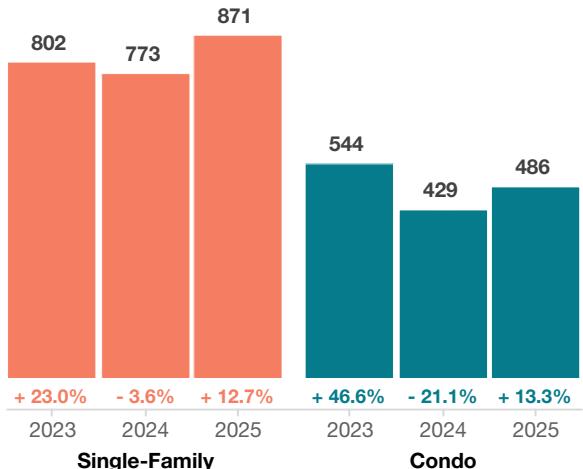
Key Metrics	Historical Sparkbars					12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
	12-2023	6-2024	12-2024	6-2025	12-2025						
New Listings						429	486	+ 13.3%	8,871	8,830	- 0.5%
Pending Sales						264	317	+ 20.1%	5,078	4,962	- 2.3%
Closed Sales						383	408	+ 6.5%	5,079	4,924	- 3.1%
Days on 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

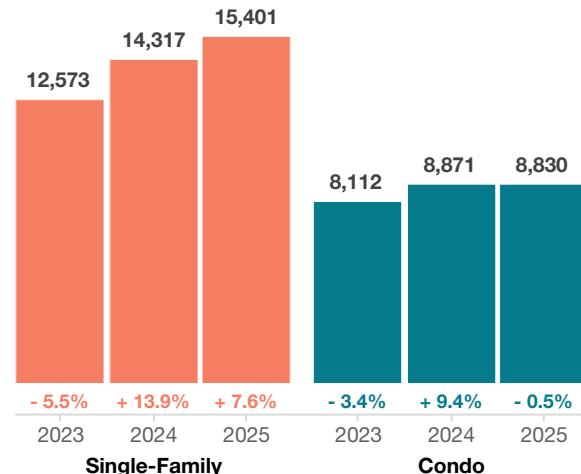
A count of the properties that have been newly listed on the market in a given month.



December

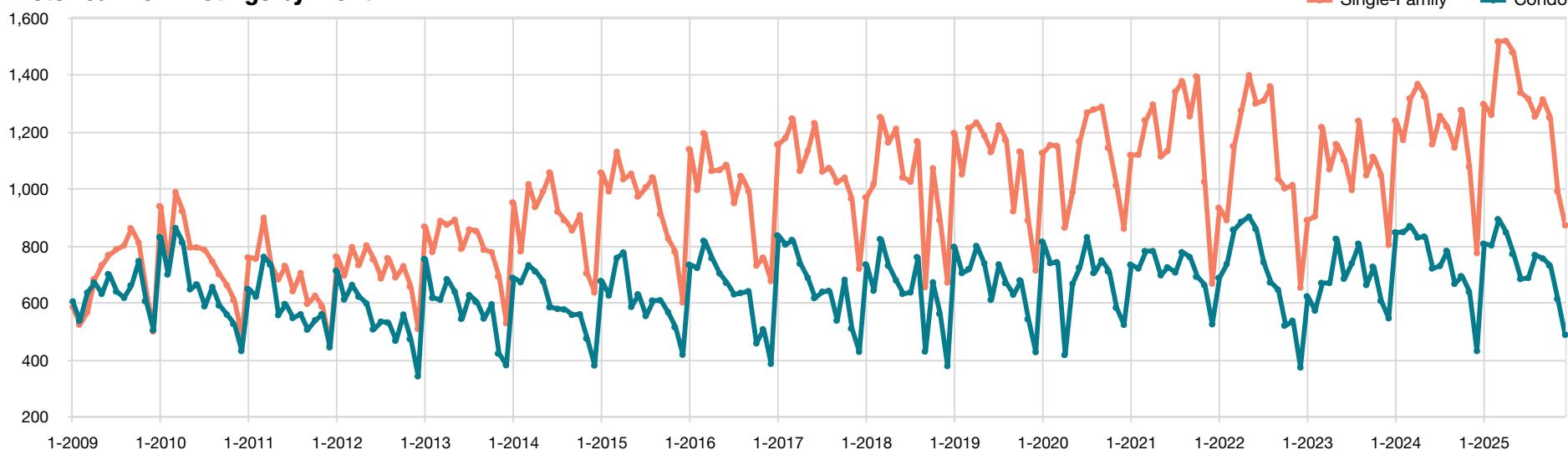


Year to Date



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%
Dec-2025	871	+ 12.7%	486	+ 13.3%
12-Month Avg	1,283	+ 7.5%	736	- 0.4%

Historical New Listings by Month

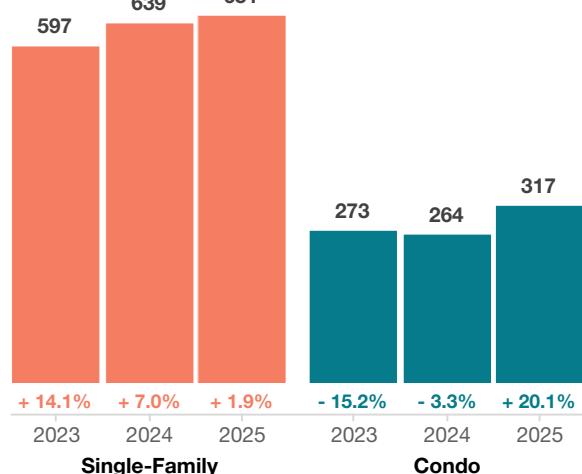


Pending Sales

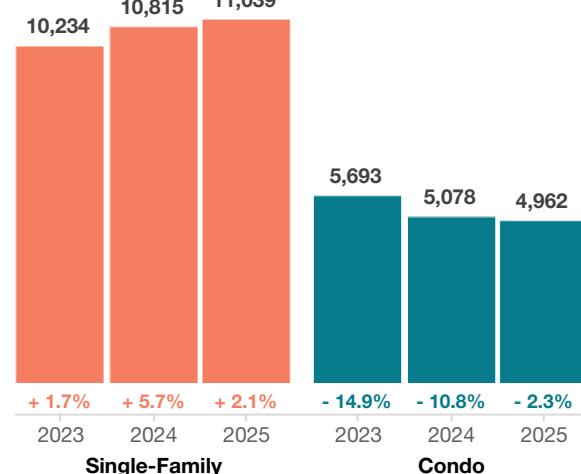
A count of the properties on which offers have been accepted in a given month.



December

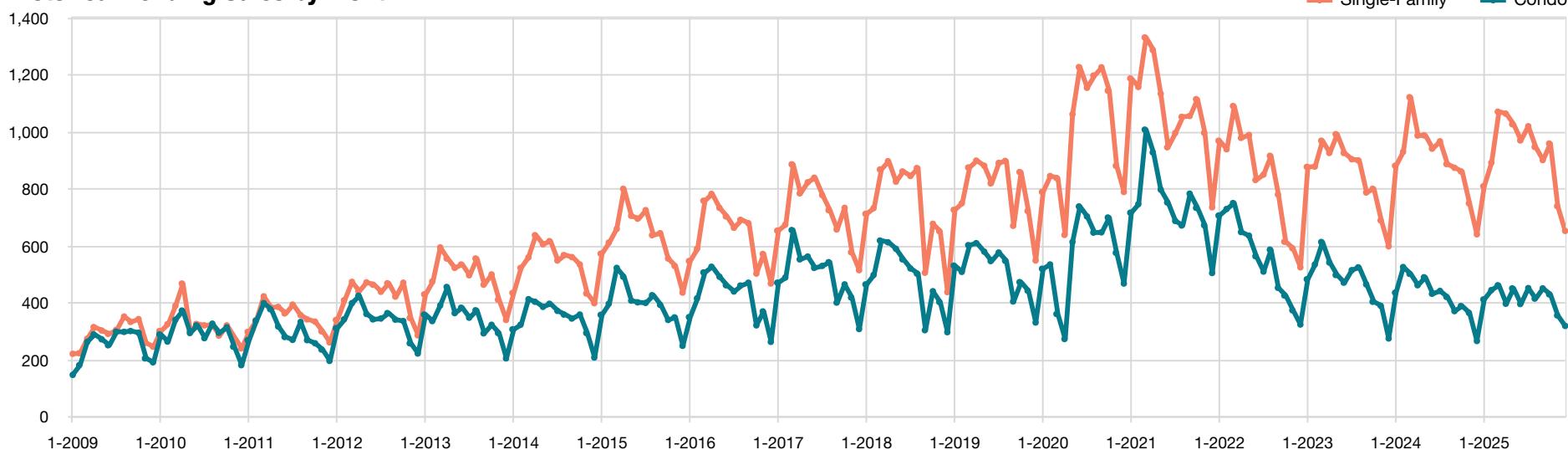


Year to Date



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

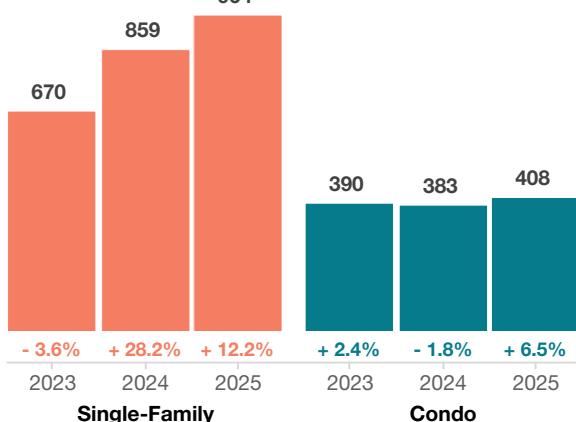


Closed Sales

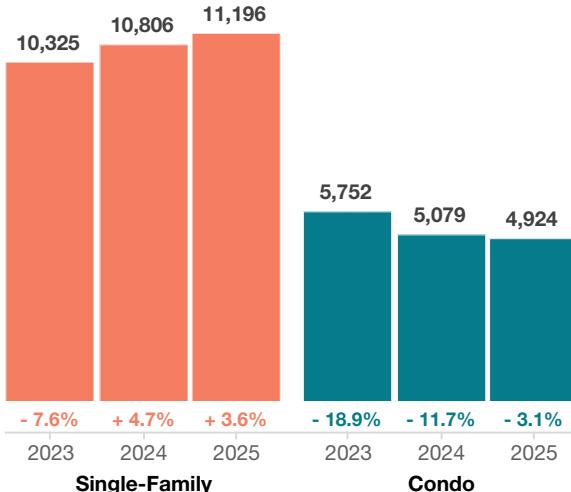
A count of the actual sales that closed in a given month.



December

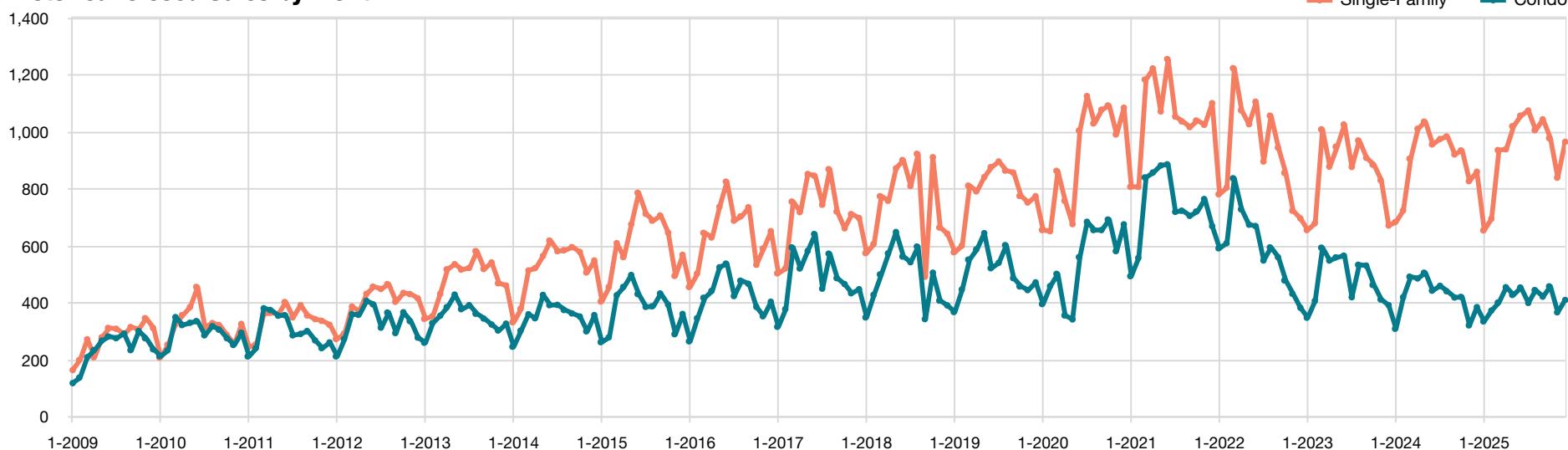


Year to Date



	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

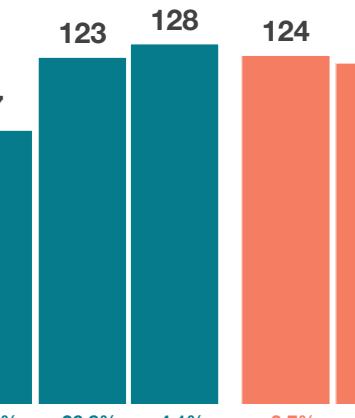


Days on Market Until Sale

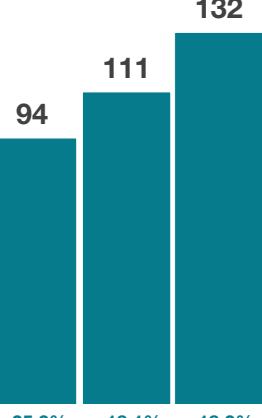
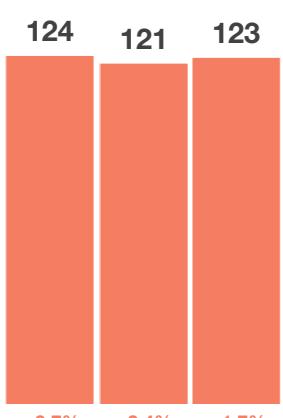
Average number of days between when a property is listed and when an offer is accepted in a given month.



December



Year to Date

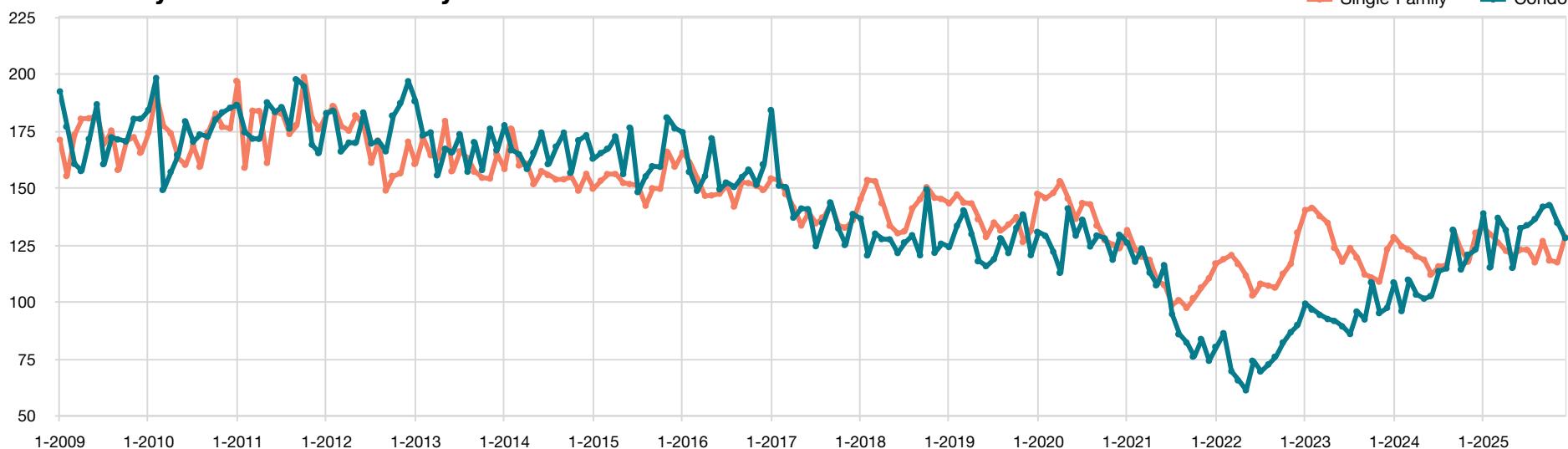


Days on Market	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	132	+ 3.1%	139	+ 28.7%
Feb-2025	129	+ 4.0%	115	+ 19.8%
Mar-2025	126	+ 2.4%	137	+ 24.5%
Apr-2025	122	+ 1.7%	131	+ 27.2%
May-2025	120	+ 1.7%	115	+ 13.9%
Jun-2025	123	+ 9.8%	132	+ 29.4%
Jul-2025	123	+ 7.0%	133	+ 17.7%
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%
Dec-2025	128	- 1.5%	128	+ 4.1%
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.

Single-Family Condo

Historical Days on Market Until Sale by Month

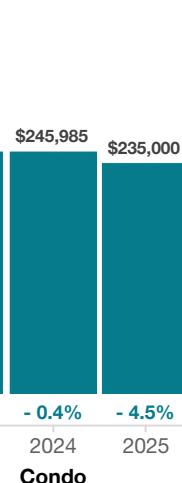
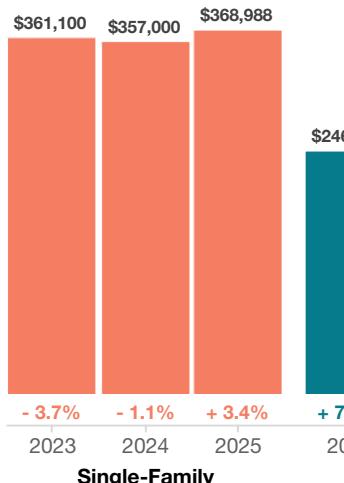


Median Sales Price

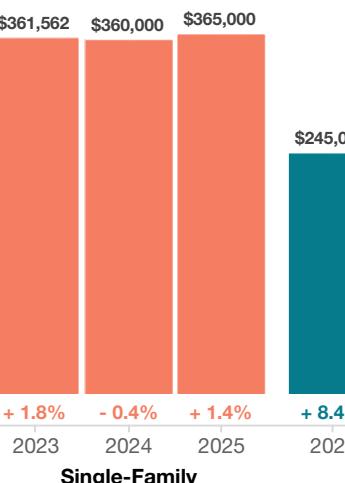
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



December



Year to Date

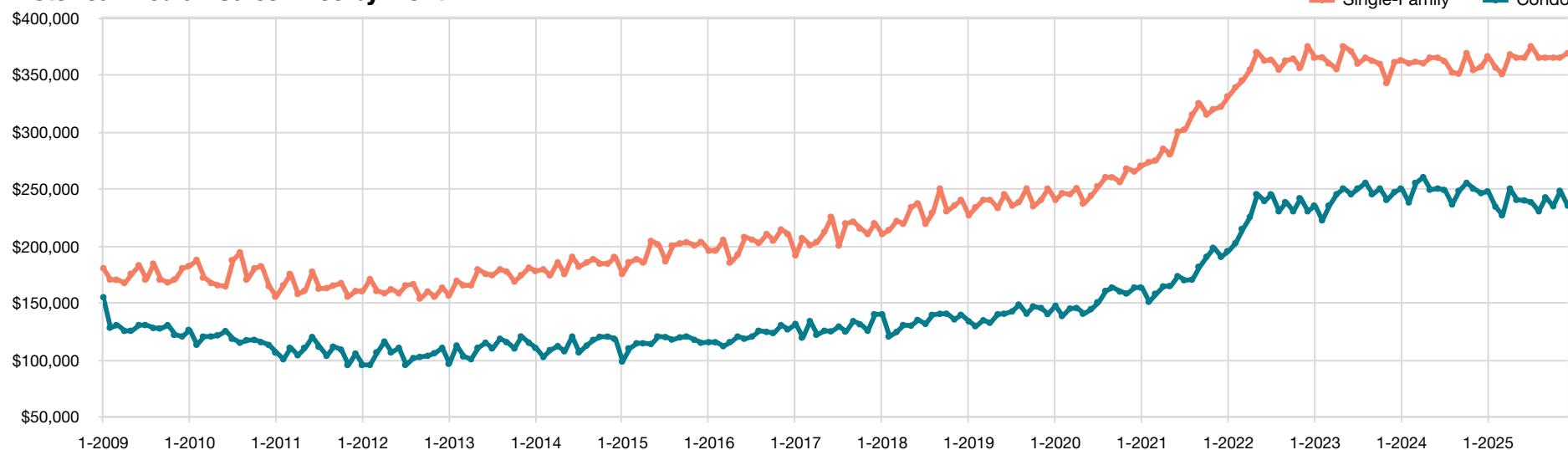


Median Sales Price	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	\$366,200	+ 0.9%	\$247,500	- 1.0%
Feb-2025	\$356,350	- 1.0%	\$234,000	- 1.6%
Mar-2025	\$350,490	- 3.0%	\$226,500	- 11.2%
Apr-2025	\$367,850	+ 2.2%	\$249,999	- 3.8%
May-2025	\$365,000	0.0%	\$240,000	- 3.6%
Jun-2025	\$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.

— Single-Family — Condo

Historical Median Sales Price by Month

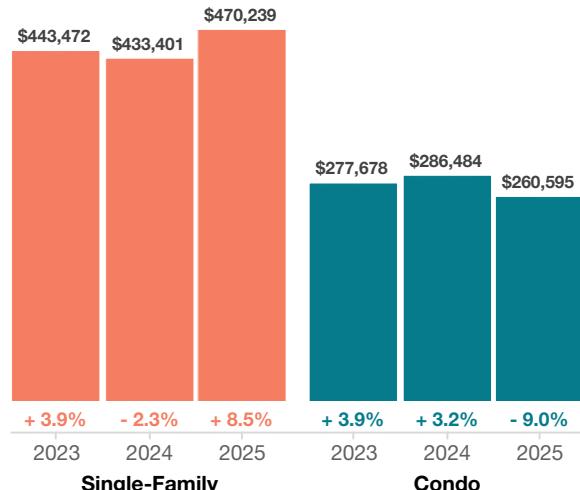


Average Sales Price

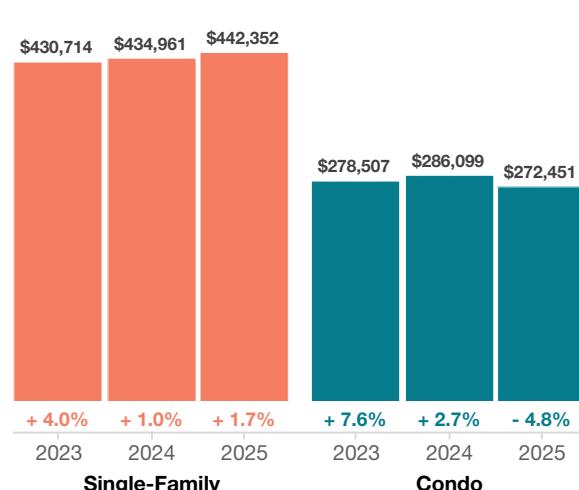
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



December



Year to Date

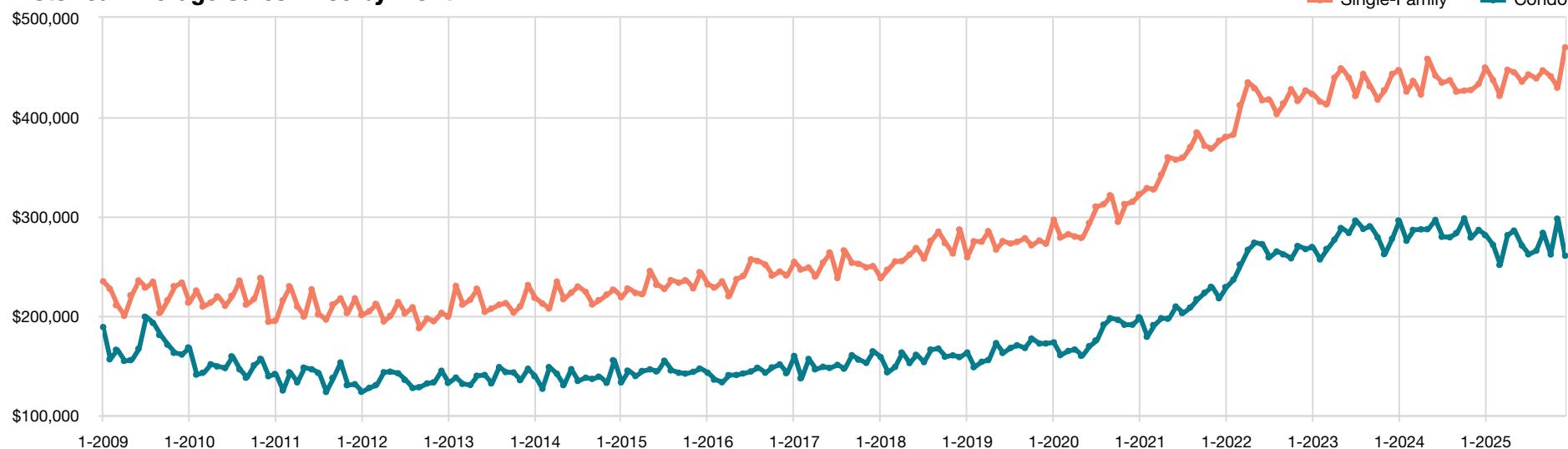


Avg. Sales Price	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
			Condo	Year-Over-Year Change
Jan-2025	\$449,919	+ 0.6%	\$281,284	- 4.9%
Feb-2025	\$437,373	+ 2.7%	\$271,421	- 1.5%
Mar-2025	\$421,484	- 3.4%	\$251,284	- 12.3%
Apr-2025	\$447,711	+ 5.9%	\$281,183	- 2.0%
May-2025	\$445,112	- 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%
Dec-2025	\$470,239	+ 8.5%	\$260,595	- 9.0%
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.

— Single-Family — Condo

Historical Average Sales Price by Month

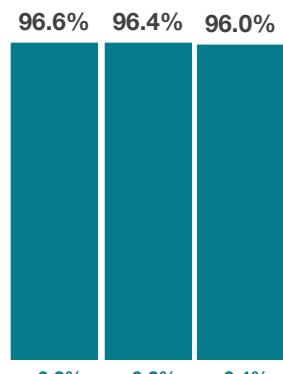
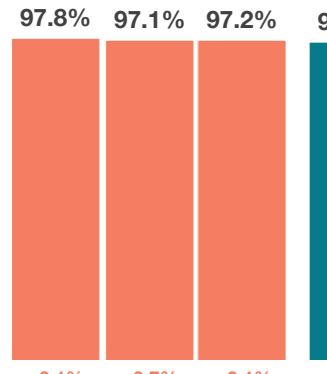


Percent of List Price Received

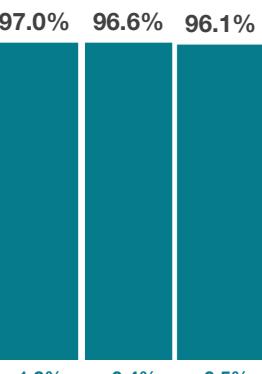
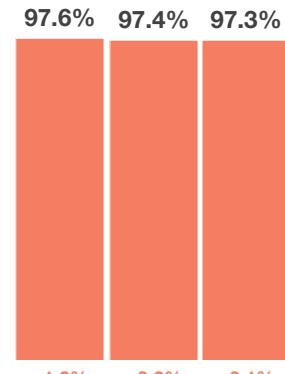
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



December



Year to Date

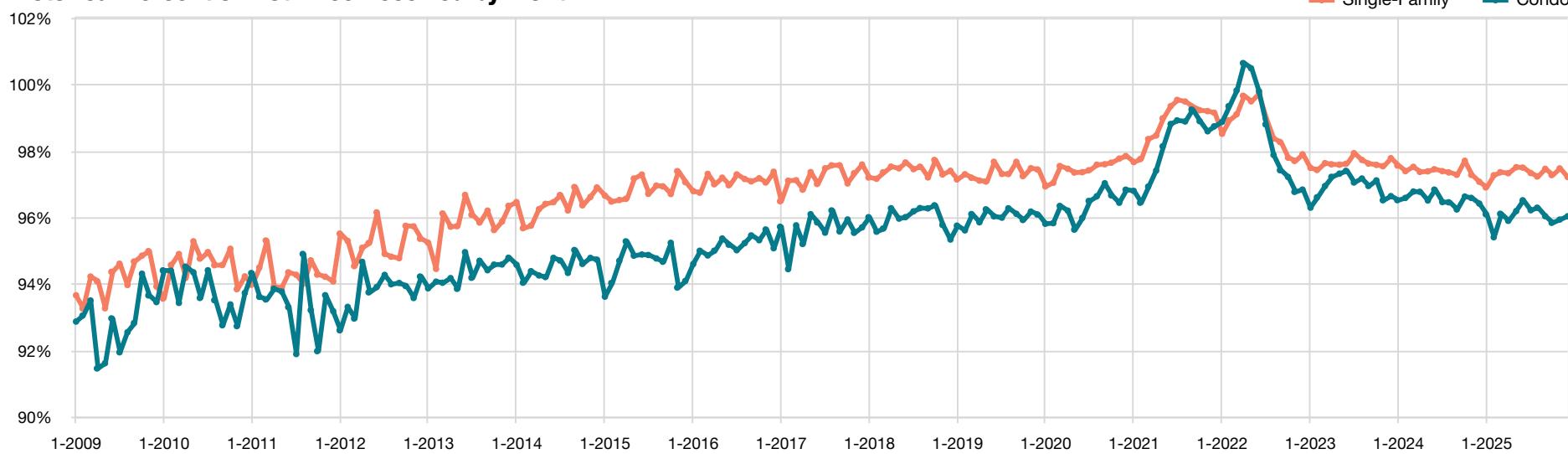


Pct. of List Price Received	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Jan-2025	96.9%	-0.7%	96.1%	-0.4%
Feb-2025	97.3%	-0.1%	95.4%	-1.2%
Mar-2025	97.4%	-0.1%	96.1%	-0.7%
Apr-2025	97.3%	-0.1%	95.9%	-0.9%
May-2025	97.5%	+0.1%	96.2%	-0.3%
Jun-2025	97.5%	+0.1%	96.5%	-0.3%
Jul-2025	97.3%	-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%
Dec-2025	97.2%	+0.1%	96.0%	-0.4%
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.

Single-Family Condo

Historical Percent of List Price Received by Month

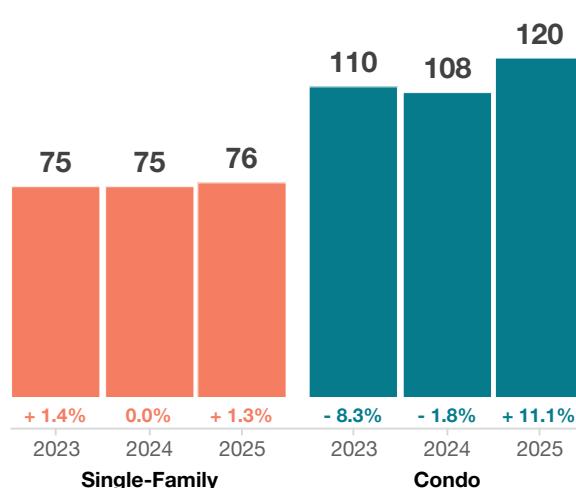


Housing Affordability Index

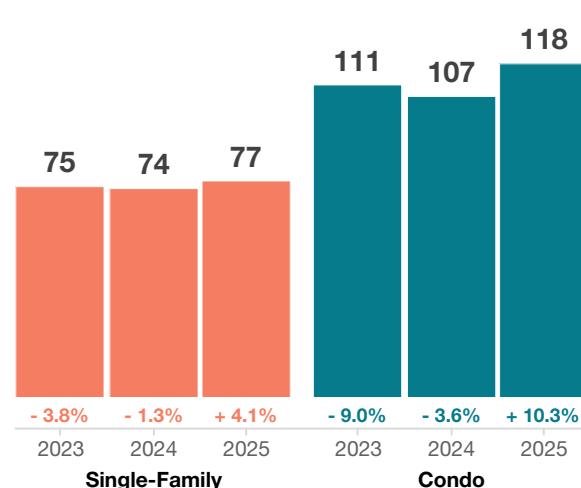
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



December

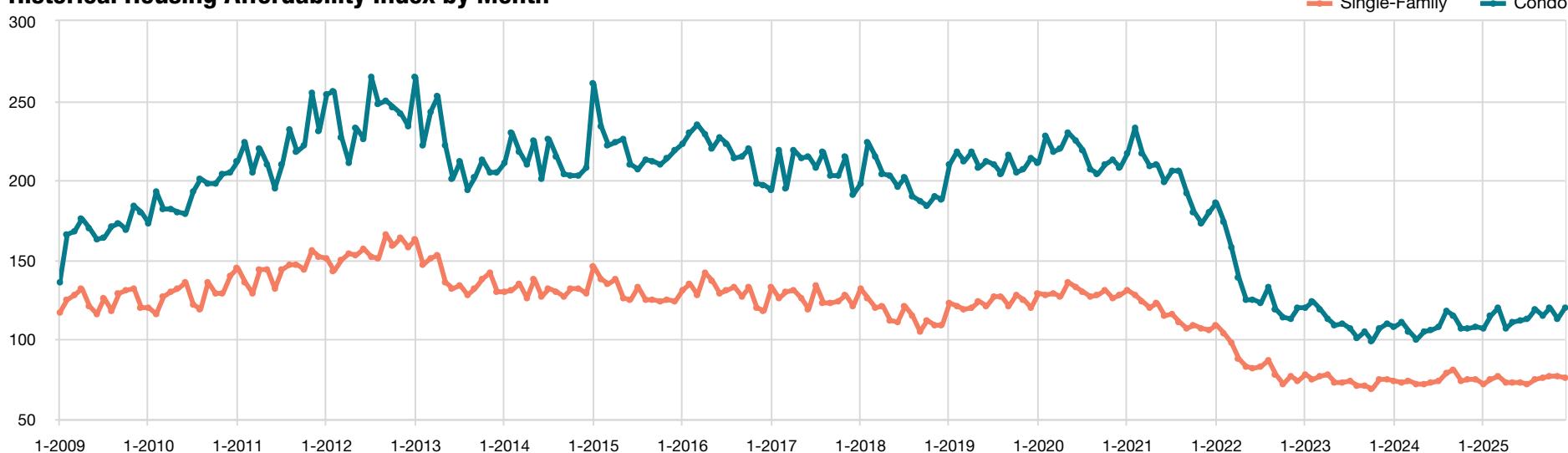


Year to Date



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

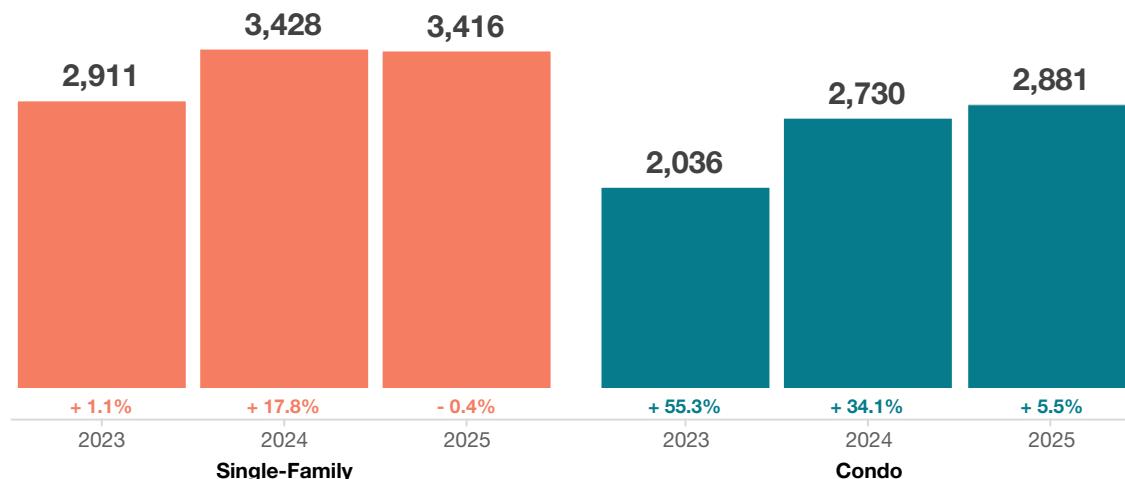


Inventory of Homes for Sale

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

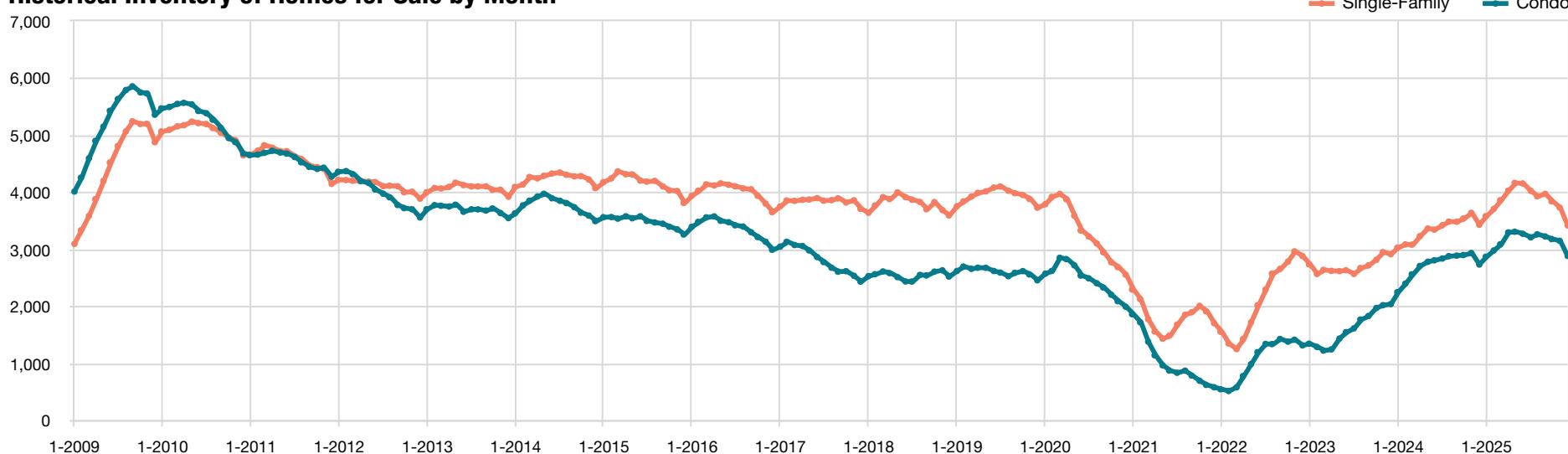


December



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

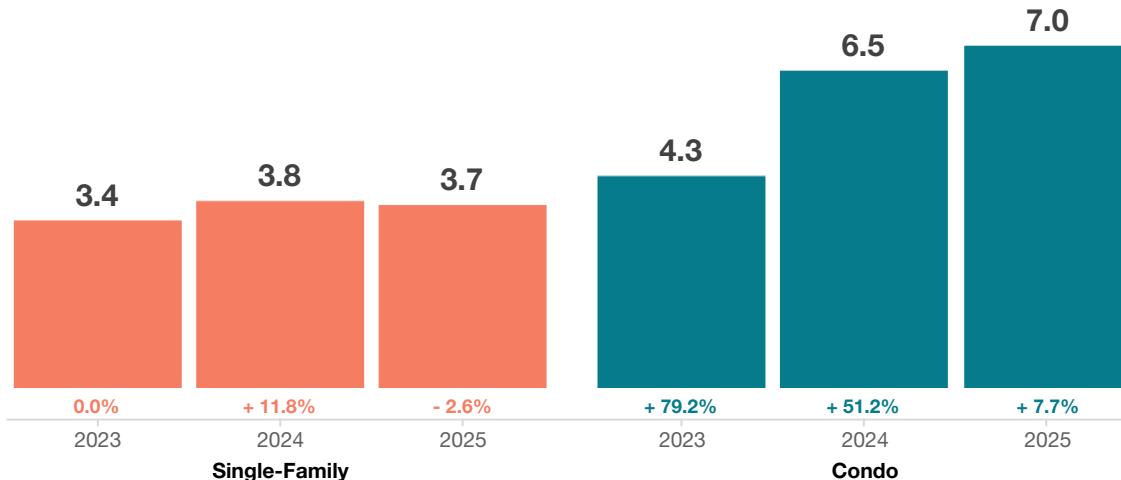


Months Supply of Inventory

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

