

Monthly Indicators



January 2026

U.S. existing-home sales climbed 5.1% month-over-month and 1.4% year-over-year to a seasonally adjusted annual rate of 4.35 million units, the strongest pace in nearly three years, according to the National Association of REALTORS® (NAR). Lower mortgage rates and slower home price growth helped spur buyer activity, and sales increased month-over-month in every region. On an annual basis, sales rose in the South, held steady in the West and Midwest, and declined in the Northeast.

New Listings increased 4.5 percent for Single-Family homes and 6.4 percent for Condo homes. Pending Sales increased 13.3 percent for Single-Family homes but remained flat for Condo homes. Inventory increased 0.3 percent for Single-Family homes and 6.6 percent for Condo homes.

Median Sales Price decreased 2.4 percent to \$357,248 for Single-Family homes and 4.5 percent to \$236,250 for Condo homes. Days on Market decreased 3.8 percent for Single-Family homes and 4.3 percent for Condo homes. Months Supply of Inventory decreased 2.5 percent for Single-Family homes but increased 8.8 percent for Condo homes.

Nationally, there were 1.18 million homes for sale heading into January, an 18.1% decline from the previous month but 3.5% higher compared to the same period last year, representing a 3.3-month supply at the current sales pace, according to NAR. Meanwhile, the median existing-home price rose 0.4% from a year ago to \$405,400, reflecting a continued moderation in national price growth.

Quick Facts

- 7.5%	- 3.5%	- 15.0%
Change in Closed Sales All Properties	Change in Closed Sales Single-Family Only	Change in Closed Sales 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	1-2025	1-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		1,297	1,356	+ 4.5%	1,297	1,356	+ 4.5%
Pending Sales		809	917	+ 13.3%	809	917	+ 13.3%
Closed Sales		653	630	- 3.5%	653	630	- 3.5%
Days on Market Until Sale		132	127	- 3.8%	132	127	- 3.8%
Median Sales Price		\$366,200	\$357,248	- 2.4%	\$366,200	\$357,248	- 2.4%
Average Sales Price		\$449,919	\$453,807	+ 0.9%	\$449,919	\$453,807	+ 0.9%
Percent of List Price Received		96.9%	97.0%	+ 0.1%	96.9%	97.0%	+ 0.1%
Housing Affordability Index		77	85	+ 10.4%	77	85	+ 10.4%
Inventory of Homes for Sale		3,576	3,586	+ 0.3%	—	—	—
Months Supply of Inventory		4.0	3.9	- 2.5%	—	—	—

Condo Market Overview

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



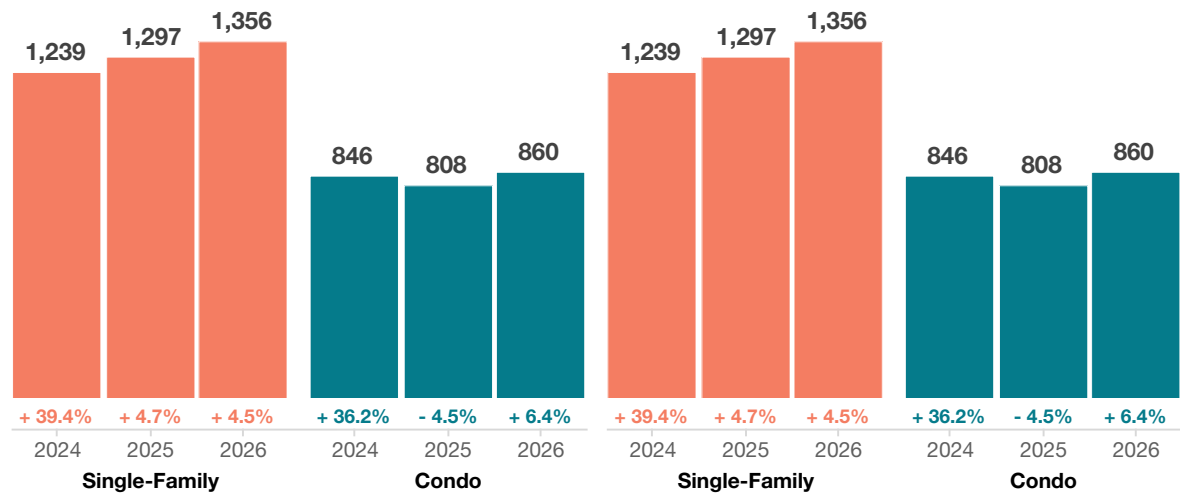
Key Metrics	Historical Sparkbars	1-2025	1-2026	% Change	YTD 2025	YTD 2026	% Change
New Listings		808	860	+ 6.4%	808	860	+ 6.4%
Pending Sales		409	409	0.0%	409	409	0.0%
Closed Sales		333	283	- 15.0%	333	283	- 15.0%
Days on Market Until Sale		139	133	- 4.3%	139	133	- 4.3%
Median Sales Price		\$247,500	\$236,250	- 4.5%	\$247,500	\$236,250	- 4.5%
Average Sales Price		\$281,284	\$269,493	- 4.2%	\$281,284	\$269,493	- 4.2%
Percent of List Price Received		96.1%	95.7%	- 0.4%	96.1%	95.7%	- 0.4%
Housing Affordability Index		115	129	+ 12.2%	115	129	+ 12.2%
Inventory of Homes for Sale		2,869	3,058	+ 6.6%	—	—	—
Months Supply of Inventory		6.8	7.4	+ 8.8%	—	—	—

New Listings

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



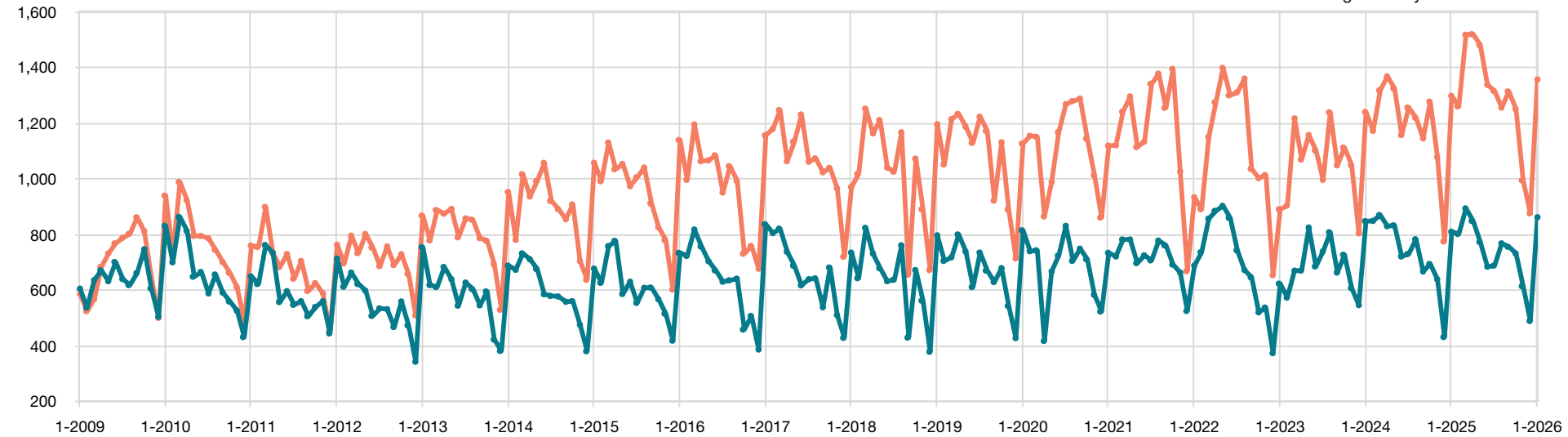
January



Year to Date

New Listings	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Feb-2025	1,259	+ 7.5%	800	- 5.5%
Mar-2025	1,517	+ 15.2%	892	+ 2.8%
Apr-2025	1,519	+ 11.1%	847	+ 2.3%
May-2025	1,480	+ 11.8%	771	- 7.2%
Jun-2025	1,337	+ 15.7%	682	- 5.1%
Jul-2025	1,315	+ 4.8%	686	- 5.8%
Aug-2025	1,255	+ 3.0%	766	- 1.9%
Sep-2025	1,313	+ 14.8%	754	+ 13.4%
Oct-2025	1,250	- 2.0%	730	+ 5.5%
Nov-2025	993	- 7.8%	612	- 3.9%
Dec-2025	874	+ 13.1%	487	+ 13.5%
Jan-2026	1,356	+ 4.5%	860	+ 6.4%
12-Month Avg	1,289	+ 7.6%	741	+ 0.7%

Historical New Listings by Month

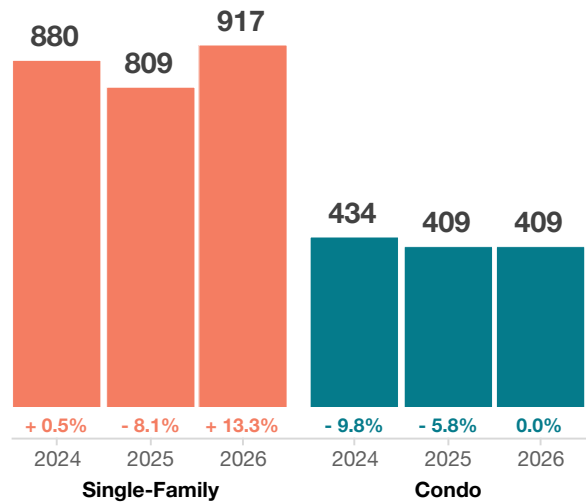


Pending Sales

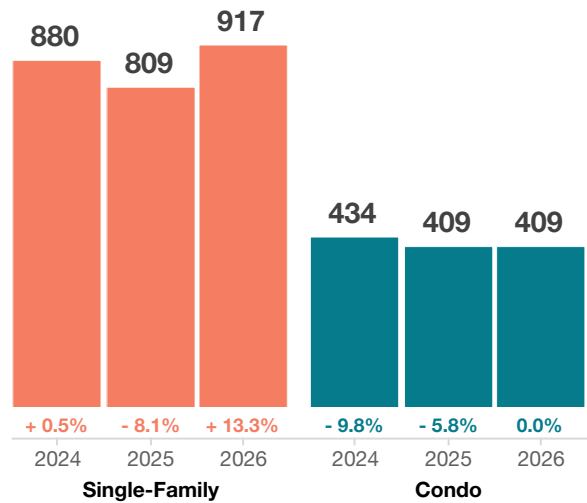
A count of the properties on which offers have been accepted in a given month.



January

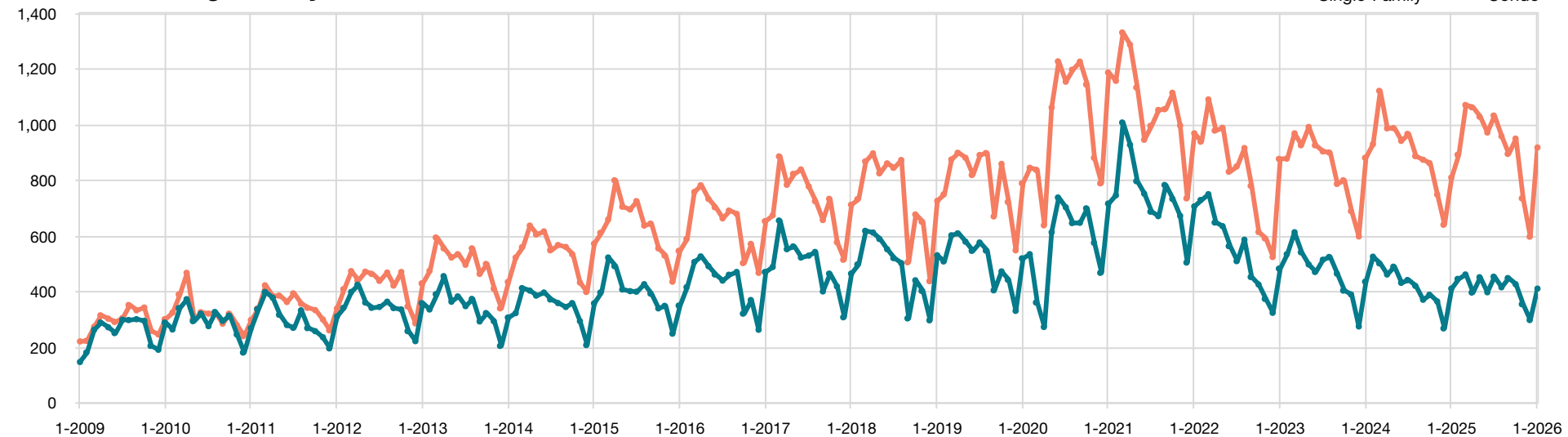


Year to Date



Pending Sales	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Feb-2025	891	- 4.1%	444	- 15.3%
Mar-2025	1,070	- 4.5%	460	- 8.0%
Apr-2025	1,062	+ 7.7%	395	- 14.1%
May-2025	1,028	+ 4.2%	450	- 7.8%
Jun-2025	971	+ 3.2%	396	- 7.9%
Jul-2025	1,032	+ 6.8%	452	+ 2.7%
Aug-2025	958	+ 8.1%	414	- 1.2%
Sep-2025	894	+ 2.4%	447	+ 21.1%
Oct-2025	949	+ 10.2%	425	+ 9.8%
Nov-2025	734	- 1.9%	353	- 2.8%
Dec-2025	596	- 6.7%	296	+ 11.3%
Jan-2026	917	+ 13.3%	409	0.0%
12-Month Avg	925	+ 3.2%	412	- 2.1%

Historical Pending Sales by Month

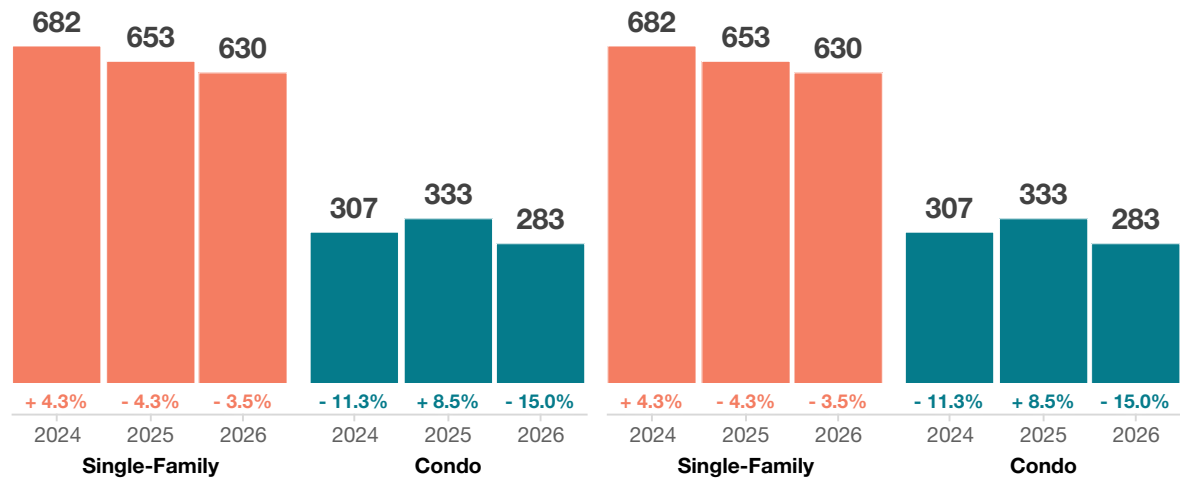


Closed Sales

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



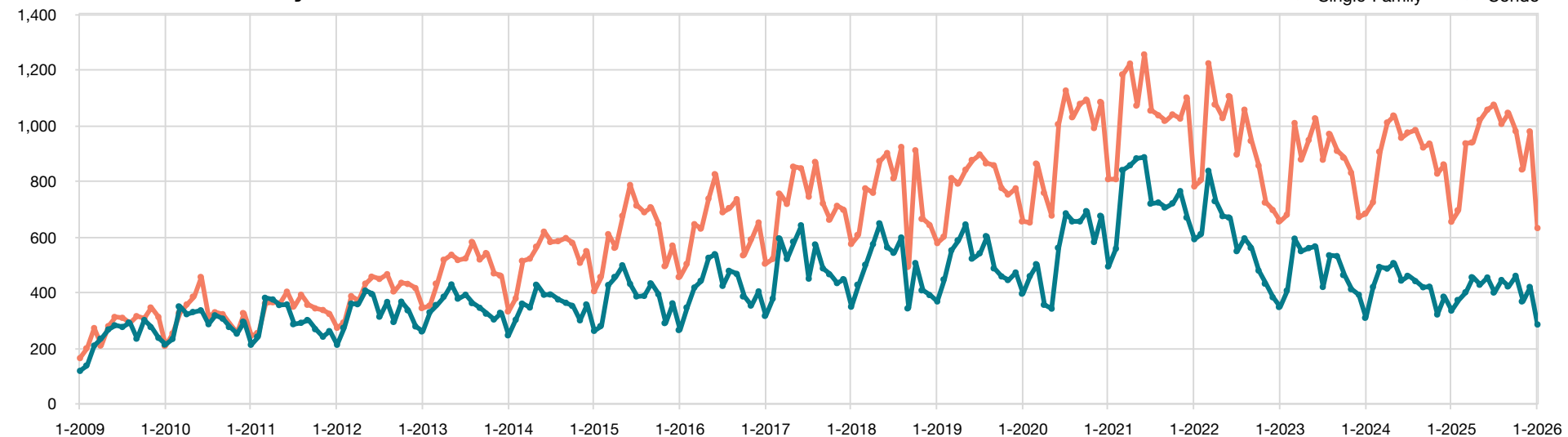
January



Year to Date

Closed Sales	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
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	1,045	+ 13.6%	420	+ 0.7%
Oct-2025	979	+ 4.8%	458	+ 9.3%
Nov-2025	841	+ 1.8%	366	+ 14.7%
Dec-2025	978	+ 13.9%	418	+ 9.1%
Jan-2026	630	- 3.5%	283	- 15.0%
12-Month Avg	933	+ 3.9%	407	- 4.2%

Historical Closed Sales by Month



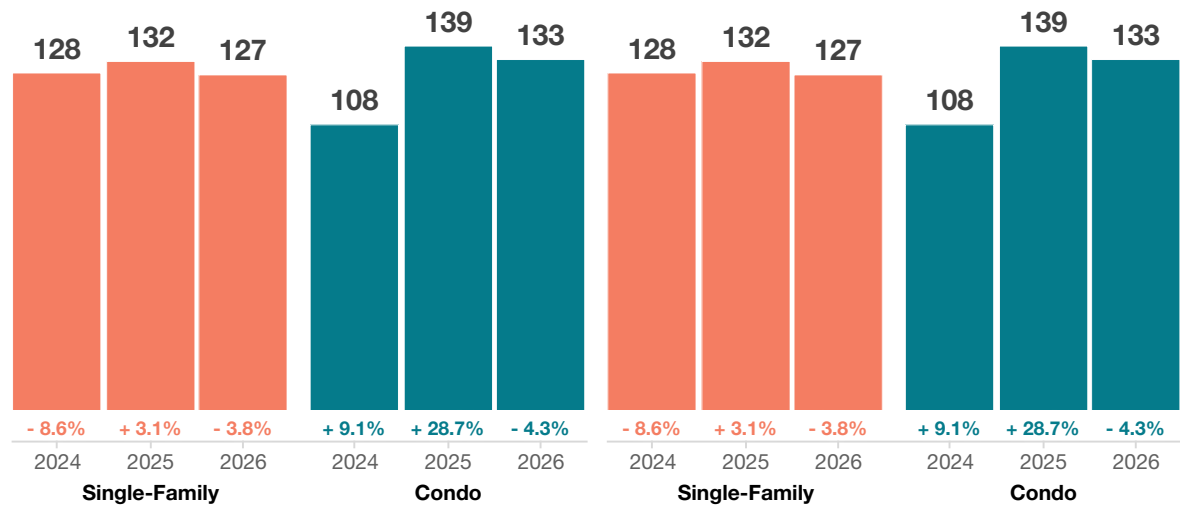
Days on Market Until Sale

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



January

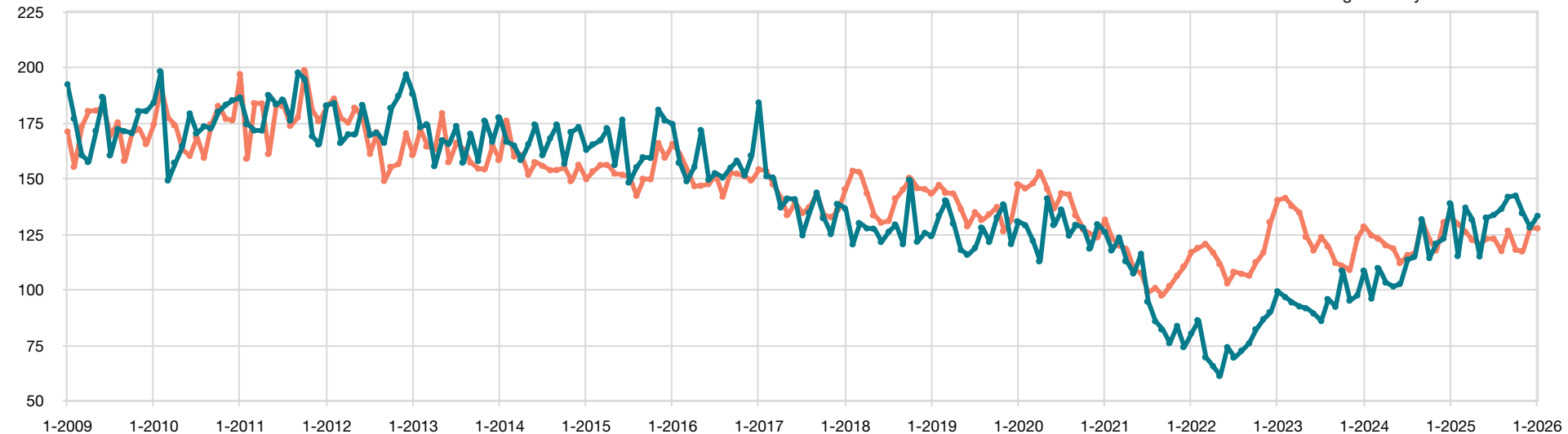
Year to Date



Days on Market	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
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%	134	+ 10.7%
Dec-2025	128	- 1.5%	128	+ 4.1%
Jan-2026	127	- 3.8%	133	- 4.3%
12-Month Avg*	123	+ 1.2%	132	+ 16.7%

* Days on Market for all properties from February 2025 through January 2026. This is not the average of the individual figures above.

Historical Days on Market Until Sale by Month

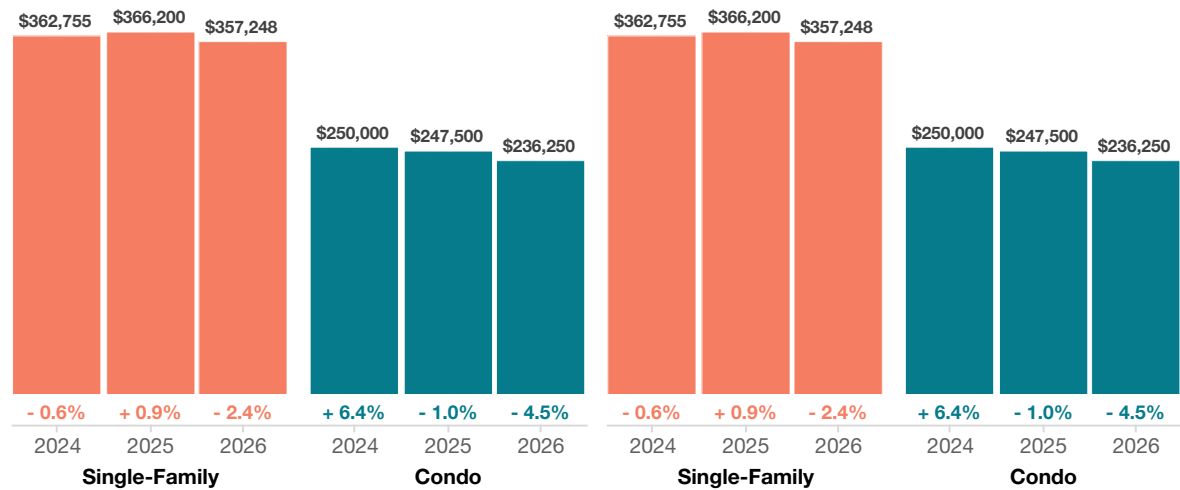


Median Sales Price

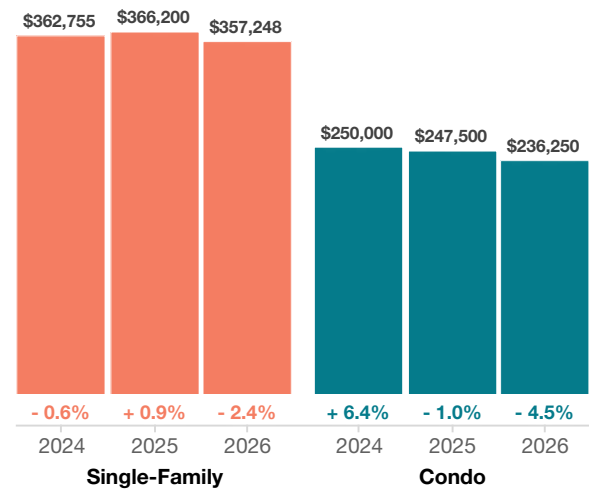
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



January



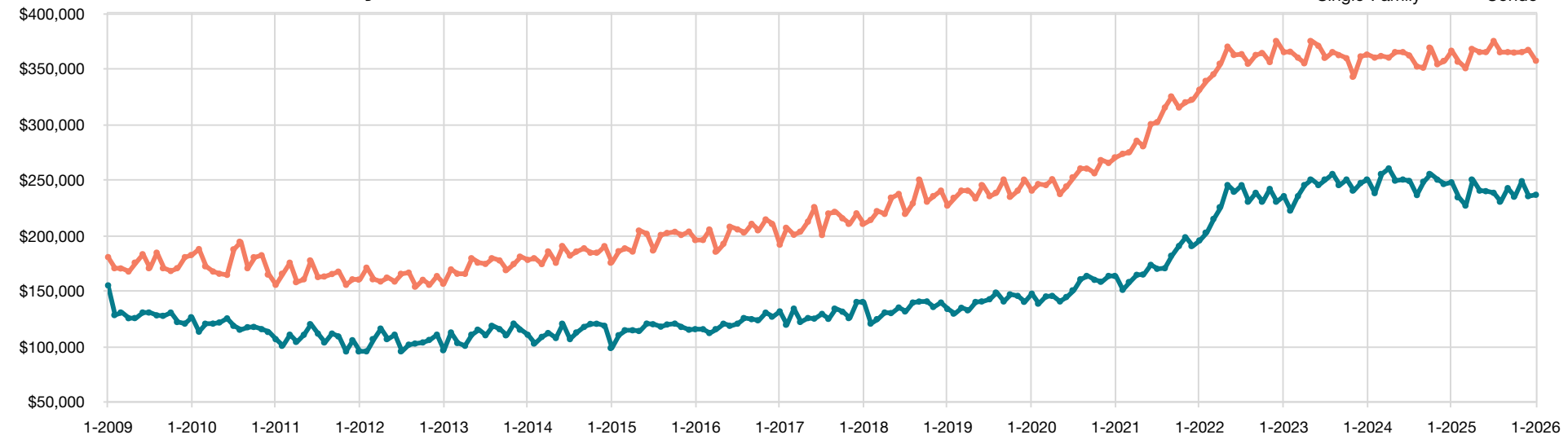
Year to Date



Median Sales Price	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
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	\$364,565	- 1.2%	\$234,500	- 8.0%
Nov-2025	\$365,000	+ 3.1%	\$248,500	- 0.6%
Dec-2025	\$366,950	+ 2.8%	\$235,000	- 4.5%
Jan-2026	\$357,248	- 2.4%	\$236,250	- 4.5%
12-Month Avg*	\$365,000	+ 1.4%	\$238,000	- 3.8%

* Median Sales Price for all properties from February 2025 through January 2026. This is not the average of the individual figures above.

Historical Median Sales Price by Month

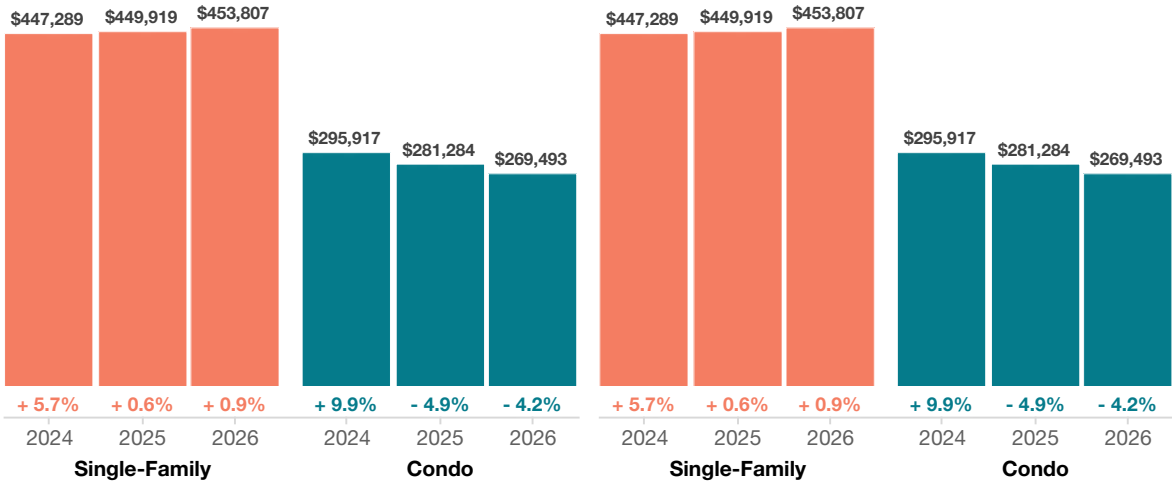


Average Sales Price

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



January

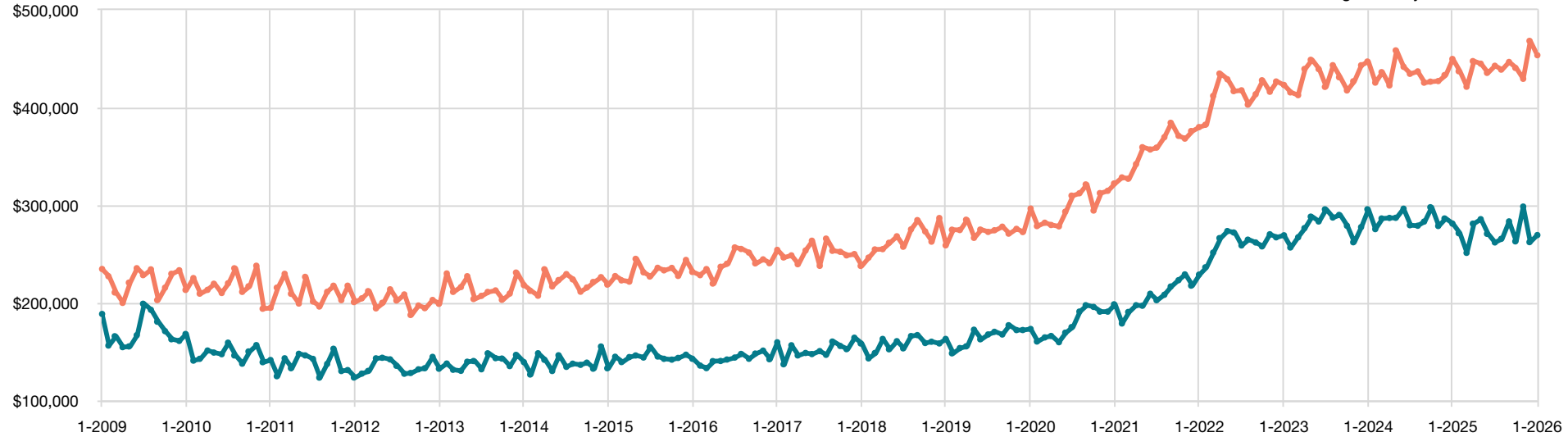


Year to Date

Avg. Sales Price	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
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	\$439,006	+ 0.4%	\$265,618	- 4.8%
Sep-2025	\$446,833	+ 5.0%	\$283,504	+ 0.1%
Oct-2025	\$440,778	+ 3.3%	\$263,062	- 11.7%
Nov-2025	\$429,618	+ 0.5%	\$298,677	+ 7.1%
Dec-2025	\$468,462	+ 8.1%	\$262,277	- 8.4%
Jan-2026	\$453,807	+ 0.9%	\$269,493	- 4.2%
12-Month Avg*	\$442,382	+ 1.7%	\$271,982	- 4.6%

* Avg. Sales Price for all properties from February 2025 through January 2026. This is not the average of the individual figures above.

Historical Average Sales Price by Month



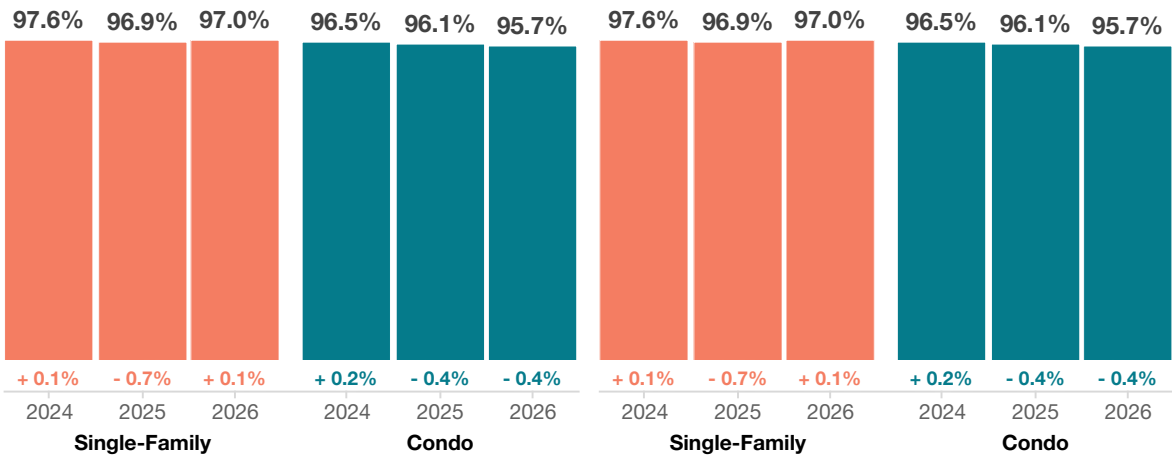
Percent of List Price Received

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.



January

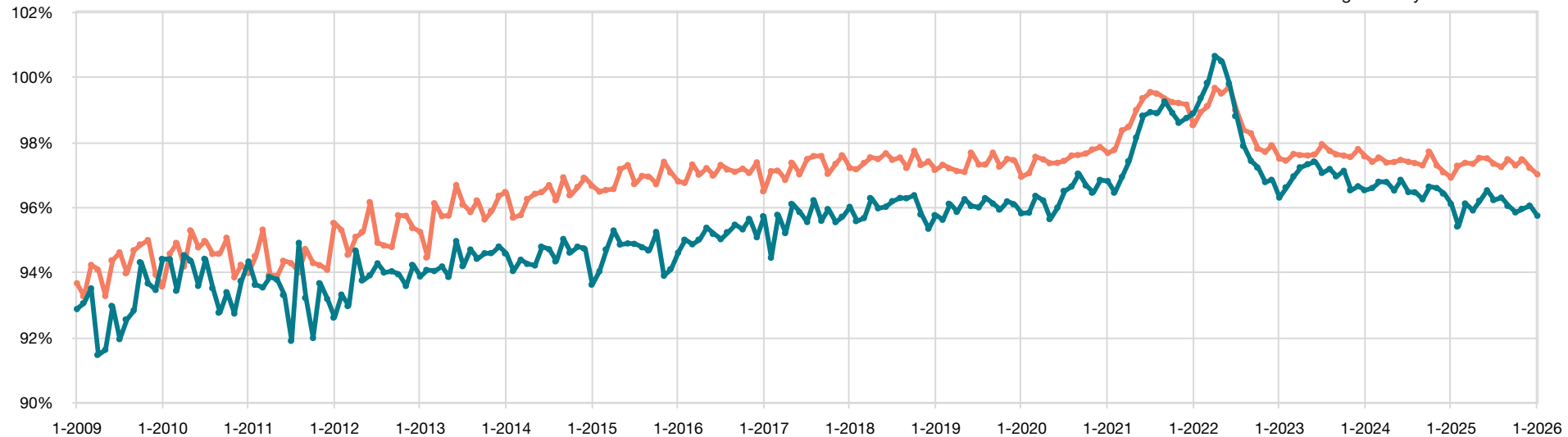
Year to Date



Pct. of List Price Received	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
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%
Jan-2026	97.0%	+ 0.1%	95.7%	- 0.4%
12-Month Avg*	97.3%	- 0.0%	96.0%	- 0.5%

* Pct. of List Price Received for all properties from February 2025 through January 2026. This is not the average of the individual figures above.

Historical Percent of List Price Received by Month



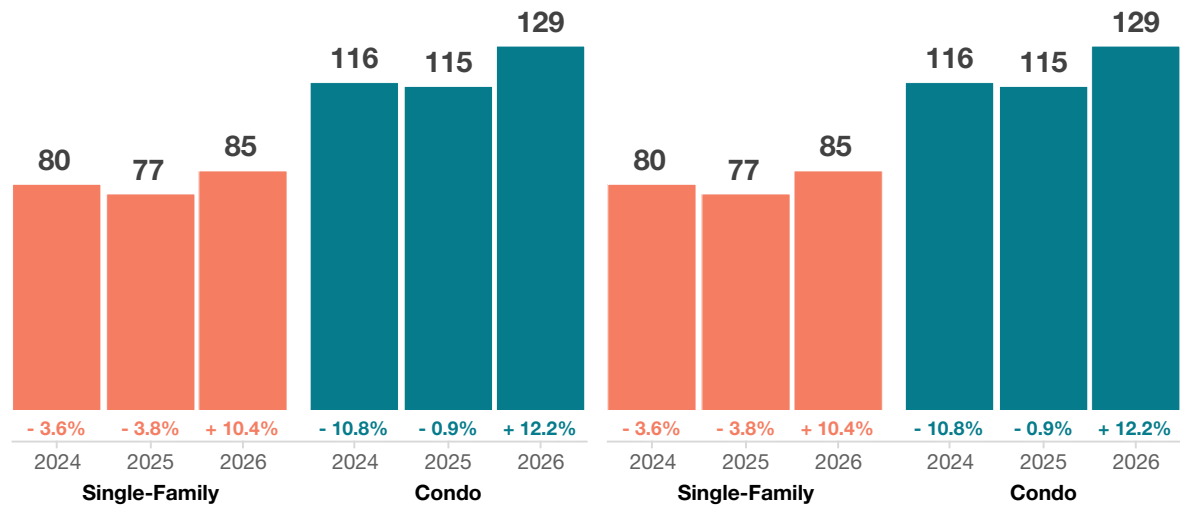
Housing Affordability Index

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.



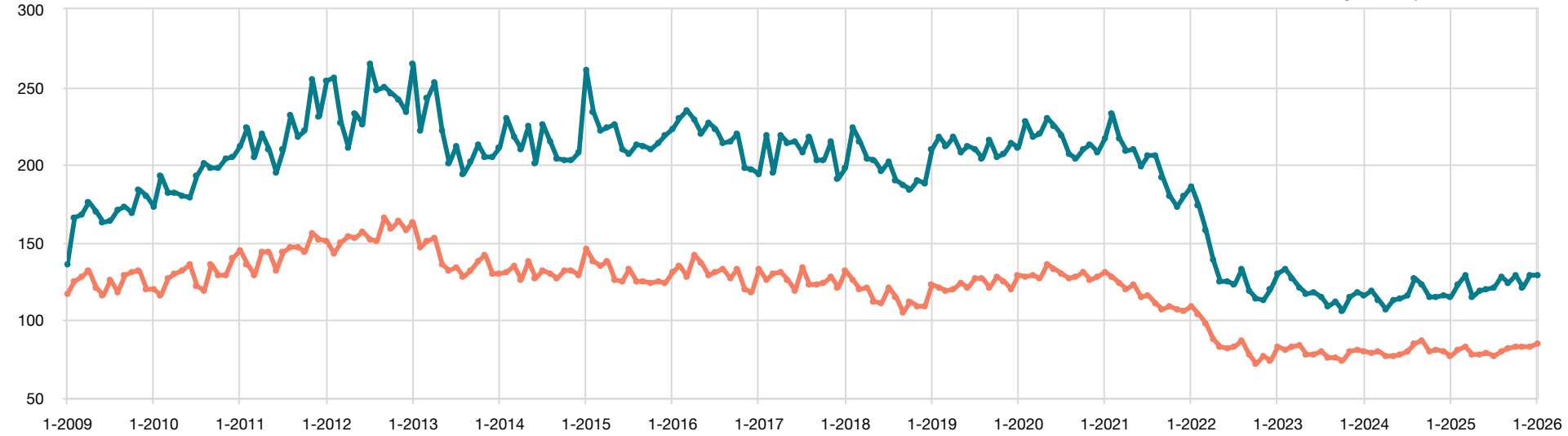
January

Year to Date



Affordability Index	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Feb-2025	81	+ 2.5%	123	+ 3.4%
Mar-2025	83	+ 3.8%	129	+ 14.2%
Apr-2025	78	+ 1.3%	115	+ 7.5%
May-2025	78	+ 1.3%	119	+ 5.3%
Jun-2025	79	+ 1.3%	120	+ 5.3%
Jul-2025	77	- 3.8%	121	+ 4.3%
Aug-2025	80	- 5.9%	128	+ 0.8%
Sep-2025	82	- 5.7%	124	+ 0.8%
Oct-2025	83	+ 3.8%	129	+ 12.2%
Nov-2025	83	+ 2.5%	121	+ 5.2%
Dec-2025	83	+ 3.8%	129	+ 11.2%
Jan-2026	85	+ 10.4%	129	+ 12.2%
12-Month Avg	81	+ 1.3%	124	+ 6.9%

Historical Housing Affordability Index by Month

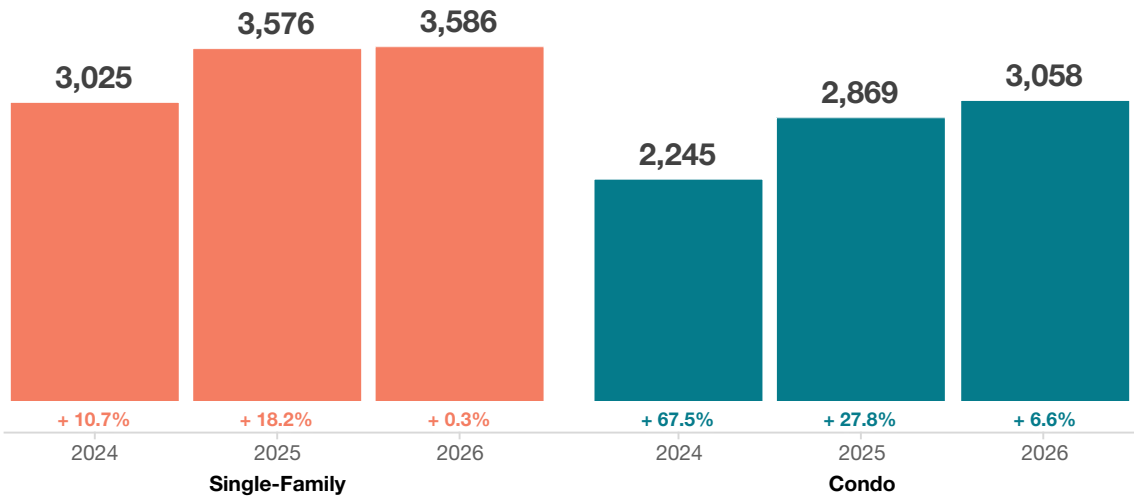


Inventory of Homes for Sale

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

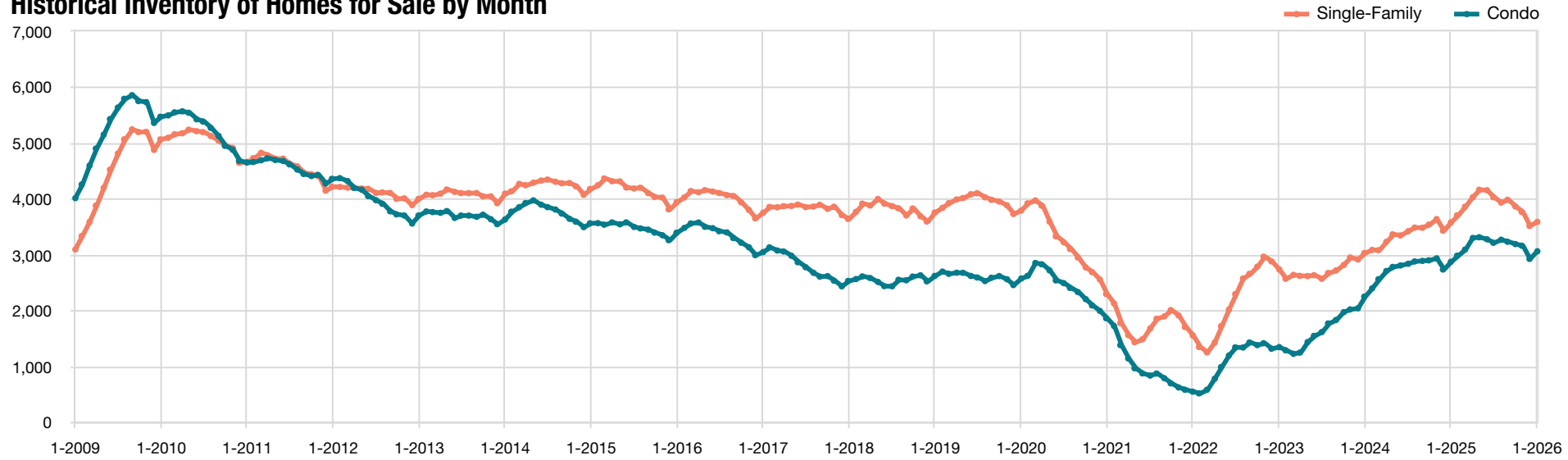


January



Homes for Sale	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
Feb-2025	3,704	+ 20.1%	2,979	+ 24.4%
Mar-2025	3,857	+ 25.3%	3,088	+ 20.8%
Apr-2025	4,027	+ 24.8%	3,297	+ 21.9%
May-2025	4,161	+ 23.8%	3,310	+ 19.2%
Jun-2025	4,153	+ 24.3%	3,273	+ 16.7%
Jul-2025	4,027	+ 17.8%	3,210	+ 13.2%
Aug-2025	3,931	+ 12.9%	3,265	+ 13.5%
Sep-2025	3,981	+ 14.4%	3,229	+ 11.9%
Oct-2025	3,862	+ 9.2%	3,188	+ 10.1%
Nov-2025	3,764	+ 3.5%	3,159	+ 7.7%
Dec-2025	3,513	+ 2.5%	2,921	+ 7.0%
Jan-2026	3,586	+ 0.3%	3,058	+ 6.6%
12-Month Avg	3,881	+ 14.6%	3,165	+ 14.2%

Historical Inventory of Homes for Sale by Month

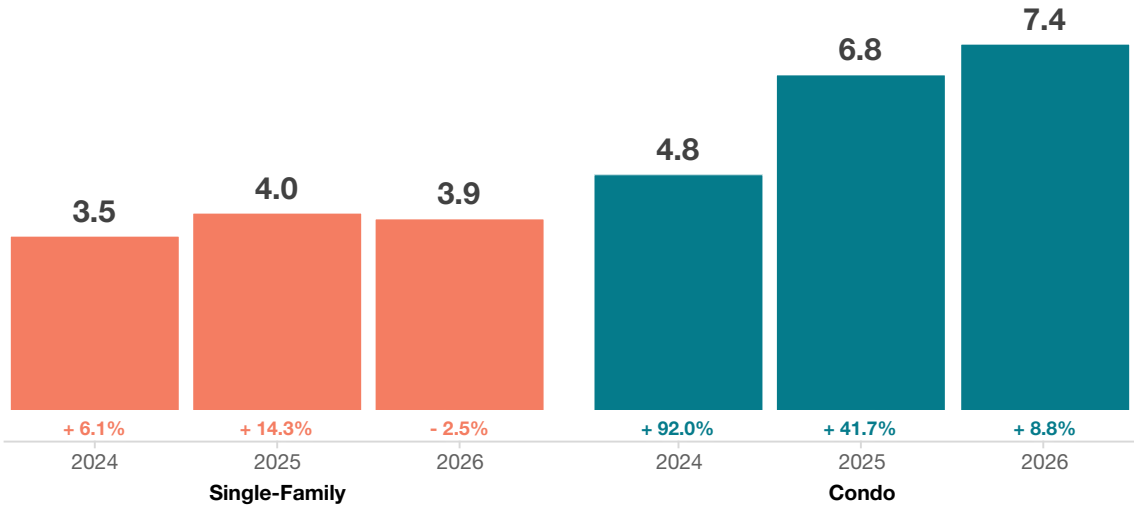


Months Supply of Inventory

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.



January



Months Supply	Single-Family	Year-Over-Year Change	Condo	Year-Over-Year Change
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%	7.8	+ 14.7%
Nov-2025	4.1	+ 2.5%	7.7	+ 11.6%
Dec-2025	3.8	0.0%	7.1	+ 9.2%
Jan-2026	3.9	- 2.5%	7.4	+ 8.8%
12-Month Avg*	4.3	+ 11.6%	7.8	+ 23.3%

* Months Supply for all properties from February 2025 through January 2026. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month

