

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 were up 7.0 percent to 7,108. Pending Sales increased 6.5 percent to 5,571. Inventory grew 15.7 percent to 27,641 units.

Median Sales Price was up 1.7 percent to \$335,720. Days on Market increased 9.9 percent to 78 days. Months Supply of Inventory was up 12.5 percent to 3.6 months.

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

+ 9.3%	+ 1.7%	+ 12.5%
One-Year Change in Closed Sales	One-Year Change in Median Sales Price	One-Year Change in Months Supply

A research tool provided by South Carolina REALTORS®. Percent changes are calculated using rounded figures.

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Market Overview

Key market metrics for the current month and year-to-date figures.



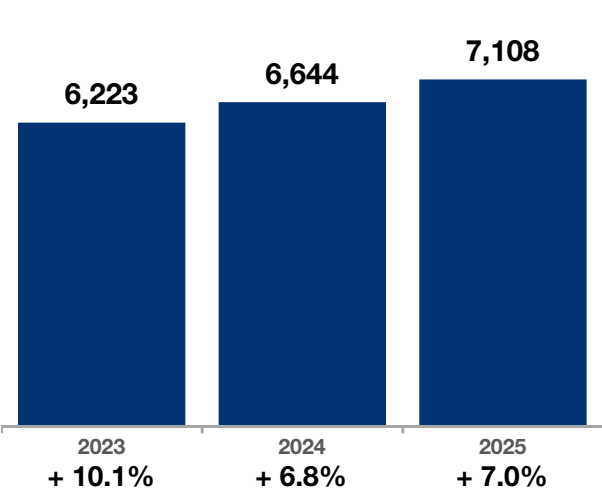
Key Metrics	Historical Sparkbars			12-2024	12-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
	12-2023	12-2024	12-2025						
New Listings				6,644	7,108	+ 7.0%	120,180	131,223	+ 9.2%
Pending Sales				5,229	5,571	+ 6.5%	88,302	91,532	+ 3.7%
Closed Sales				7,177	7,846	+ 9.3%	88,299	91,372	+ 3.5%
Days on Market				71	78	+ 9.9%	63	72	+ 14.3%
Median Sales Price				\$330,000	\$335,720	+ 1.7%	\$335,000	\$339,975	+ 1.5%
Average Sales Price				\$430,930	\$443,287	+ 2.9%	\$440,235	\$452,232	+ 2.7%
Pct. of List Price Received				97.8%	97.8%	0.0%	98.0%	97.9%	- 0.1%
Housing Affordability Index				90	94	+ 4.4%	89	93	+ 4.5%
Inventory of Homes for Sale				23,894	27,641	+ 15.7%	--	--	--
Months Supply of Inventory				3.2	3.6	+ 12.5%	--	--	--

New Listings

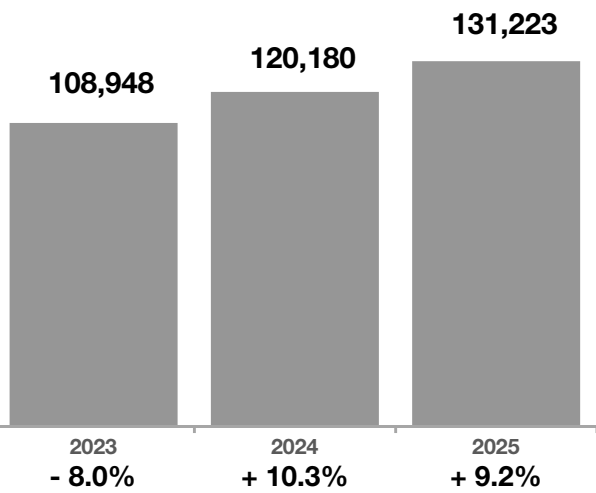
A count of the properties that have been newly listed on the market in a given month.



December

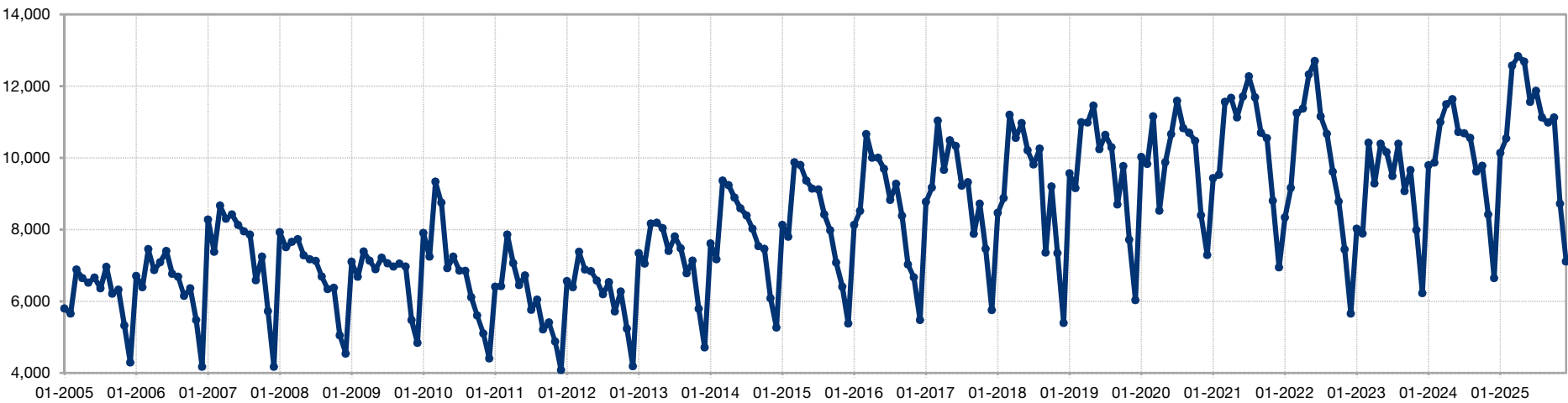


Year to Date



New Listings		Prior Year	Percent Change
January 2025	10,135	9,788	+3.5%
February 2025	10,538	9,861	+6.9%
March 2025	12,571	10,998	+14.3%
April 2025	12,829	11,489	+11.7%
May 2025	12,679	11,636	+9.0%
June 2025	11,555	10,722	+7.8%
July 2025	11,868	10,679	+11.1%
August 2025	11,125	10,556	+5.4%
September 2025	10,978	9,616	+14.2%
October 2025	11,122	9,777	+13.8%
November 2025	8,715	8,414	+3.6%
December 2025	7,108	6,644	+7.0%
12-Month Avg	10,935	10,015	+9.2%

Historical New Listings by Month

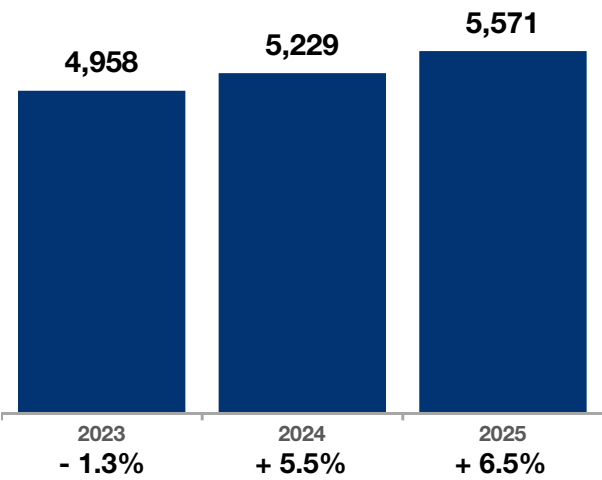


Pending Sales

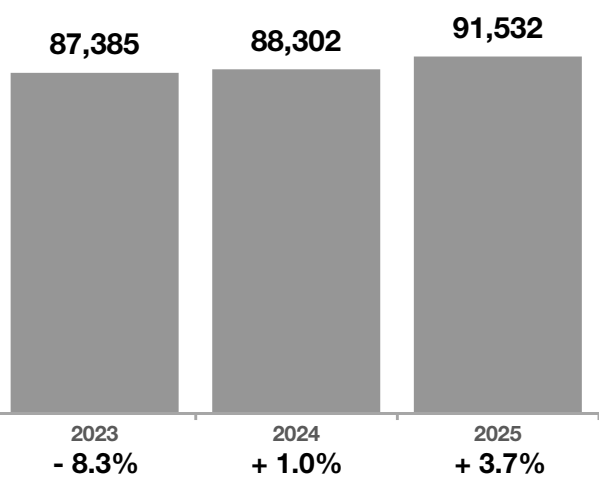
A count of the properties on which offers have been accepted in a given month.



December

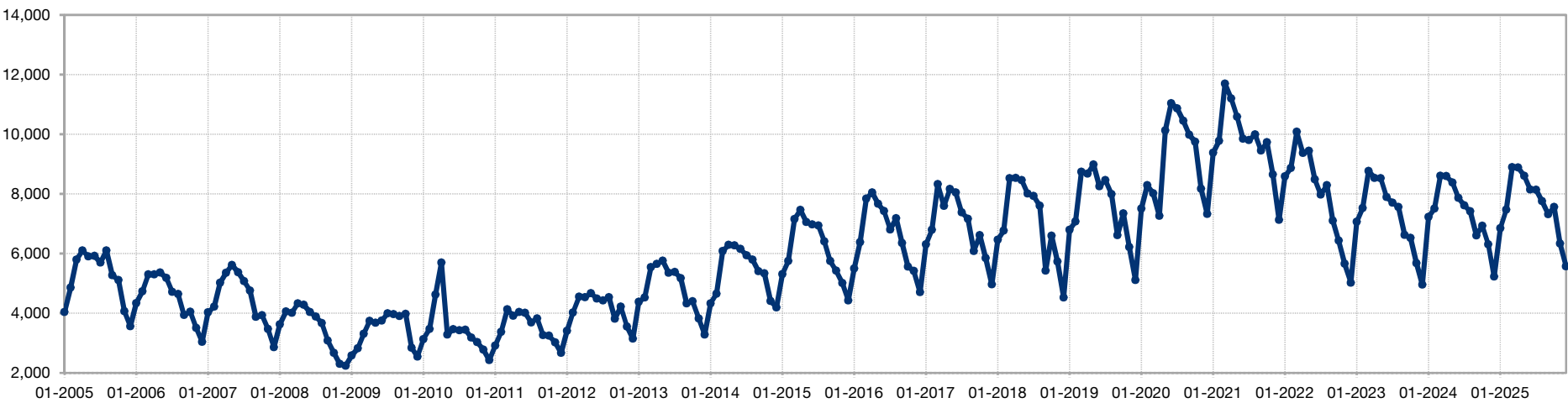


Year to Date



Pending Sales		Prior Year	Percent Change
January 2025	6,852	7,226	-5.2%
February 2025	7,469	7,509	-0.5%
March 2025	8,890	8,609	+3.3%
April 2025	8,884	8,600	+3.3%
May 2025	8,605	8,377	+2.7%
June 2025	8,148	7,869	+3.5%
July 2025	8,139	7,617	+6.9%
August 2025	7,758	7,419	+4.6%
September 2025	7,318	6,611	+10.7%
October 2025	7,563	6,928	+9.2%
November 2025	6,335	6,308	+0.4%
December 2025	5,571	5,229	+6.5%
12-Month Avg	7,628	7,359	+3.7%

Historical Pending Sales by Month

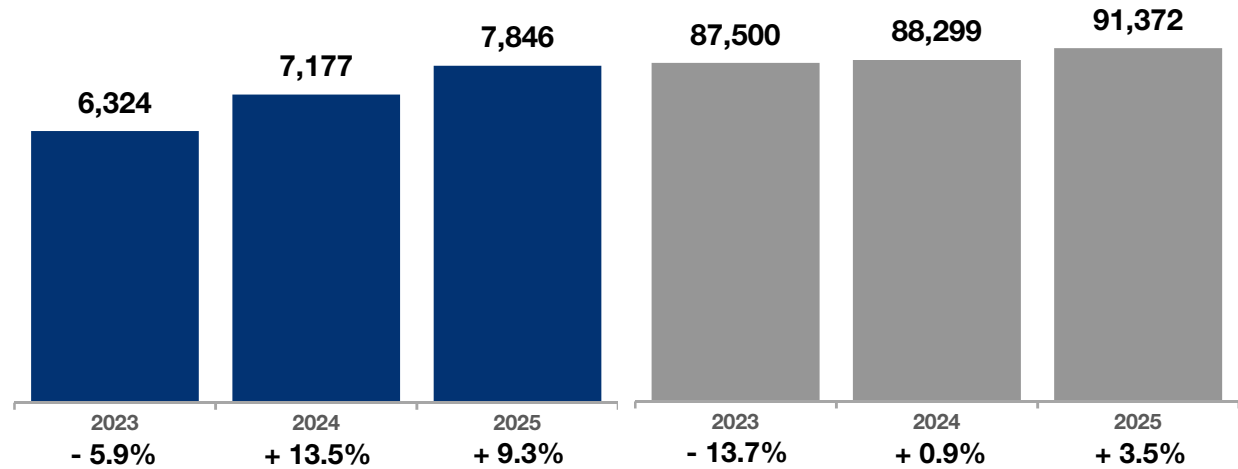


Closed Sales

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

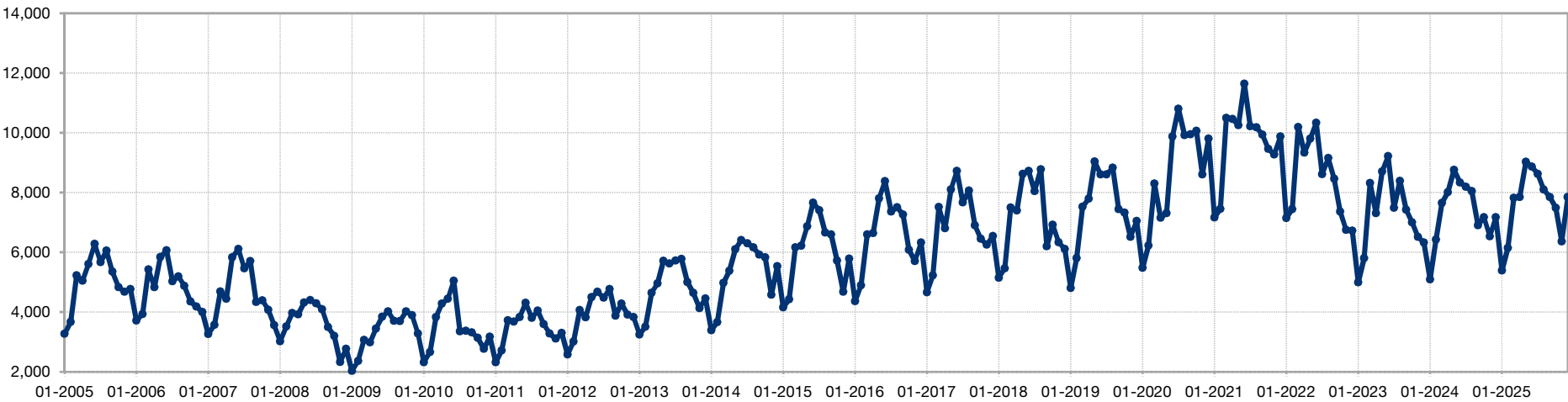


December



Closed Sales		Prior Year	Percent Change
January 2025	5,387	5,089	+5.9%
February 2025	6,148	6,423	-4.3%
March 2025	7,820	7,652	+2.2%
April 2025	7,849	8,014	-2.1%
May 2025	9,026	8,757	+3.1%
June 2025	8,869	8,332	+6.4%
July 2025	8,627	8,191	+5.3%
August 2025	8,103	8,049	+0.7%
September 2025	7,847	6,900	+13.7%
October 2025	7,489	7,178	+4.3%
November 2025	6,361	6,537	-2.7%
December 2025	7,846	7,177	+9.3%
12-Month Avg	7,614	7,358	+3.5%

Historical Closed Sales by Month

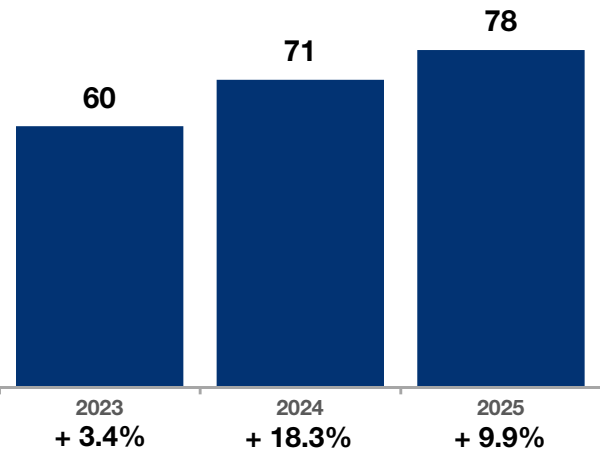


Days on Market Until Sale

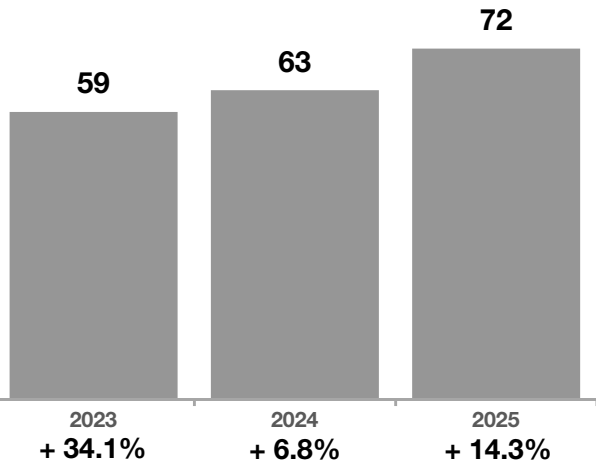
Average number of days between when a property is listed and when an offer is accepted in a given month.



December



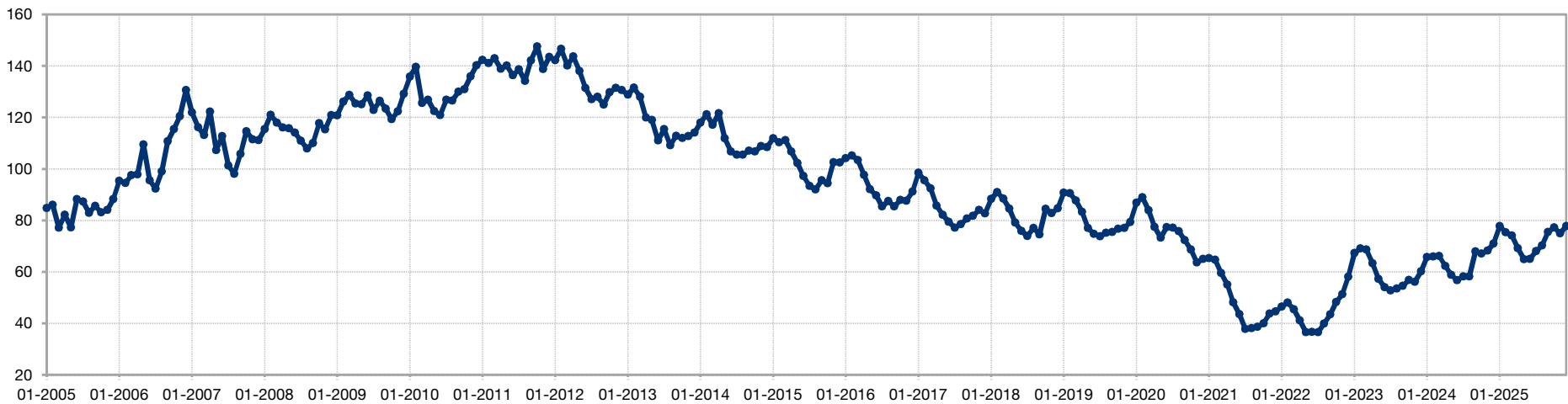
Year to Date



Days on Market		Prior Year	Percent Change
January 2025	78	66	+18.2%
February 2025	75	66	+13.6%
March 2025	74	66	+12.1%
April 2025	69	62	+11.3%
May 2025	65	59	+10.2%
June 2025	65	57	+14.0%
July 2025	68	58	+17.2%
August 2025	70	58	+20.7%
September 2025	75	68	+10.3%
October 2025	77	67	+14.9%
November 2025	75	68	+10.3%
December 2025	78	71	+9.9%
12-Month Avg*	72	63	+14.3%

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

Historical Days on Market Until Sale by Month

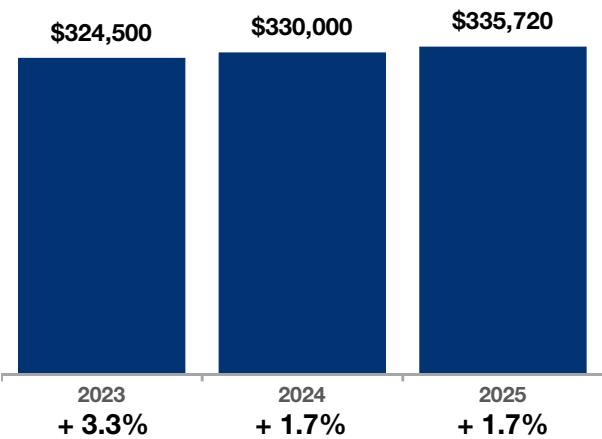


Median Sales Price

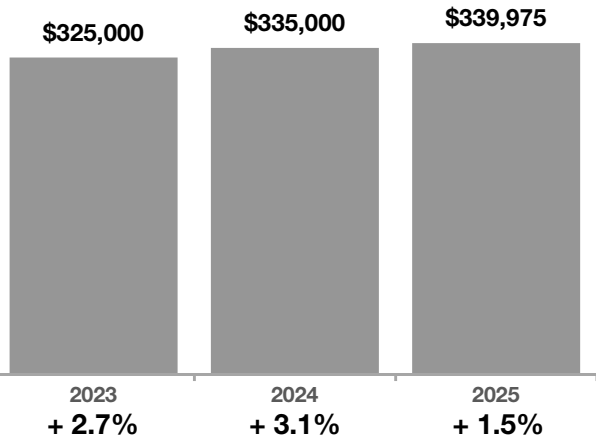
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



December



Year to Date



	Median Sales Price	Prior Year	Percent Change
January 2025	\$335,000	\$325,000	+3.1%
February 2025	\$329,995	\$327,600	+0.7%
March 2025	\$333,990	\$335,000	-0.3%
April 2025	\$340,000	\$340,000	0.0%
May 2025	\$342,442	\$340,000	+0.7%
June 2025	\$345,000	\$342,000	+0.9%
July 2025	\$349,900	\$340,000	+2.9%
August 2025	\$341,000	\$336,750	+1.3%
September 2025	\$339,000	\$330,870	+2.5%
October 2025	\$339,644	\$339,803	-0.0%
November 2025	\$337,250	\$337,808	-0.2%
December 2025	\$335,720	\$330,000	+1.7%
12-Month Med*	\$339,975	\$335,000	+1.5%

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

Historical Median Sales Price by Month

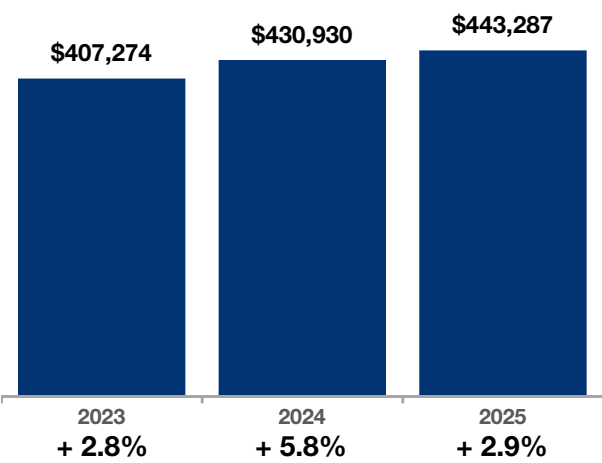


Average Sales Price

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



December



Year to Date



	Avg. Sales Price	Prior Year	Percent Change
January 2025	\$449,174	\$430,437	+4.4%
February 2025	\$447,458	\$412,628	+8.4%
March 2025	\$450,920	\$425,907	+5.9%
April 2025	\$459,286	\$449,861	+2.1%
May 2025	\$457,083	\$455,108	+0.4%
June 2025	\$447,624	\$453,766	-1.4%
July 2025	\$453,080	\$446,323	+1.5%
August 2025	\$457,370	\$436,706	+4.7%
September 2025	\$454,865	\$438,181	+3.8%
October 2025	\$451,026	\$452,584	-0.3%
November 2025	\$453,386	\$438,305	+3.4%
December 2025	\$443,287	\$430,930	+2.9%
12-Month Avg*	\$452,046	\$439,228	+2.9%

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

Historical Average Sales Price by Month

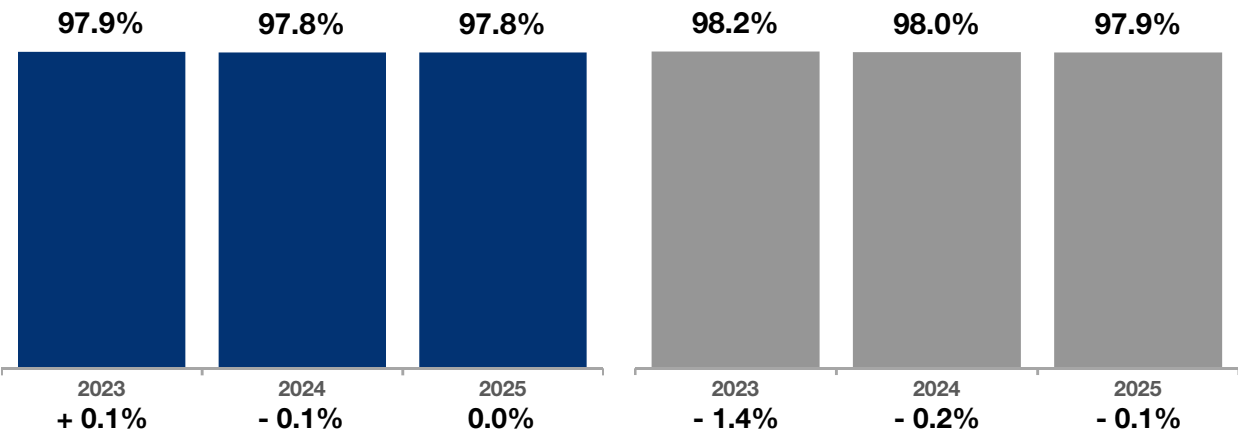


Percent of List Price Received

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.



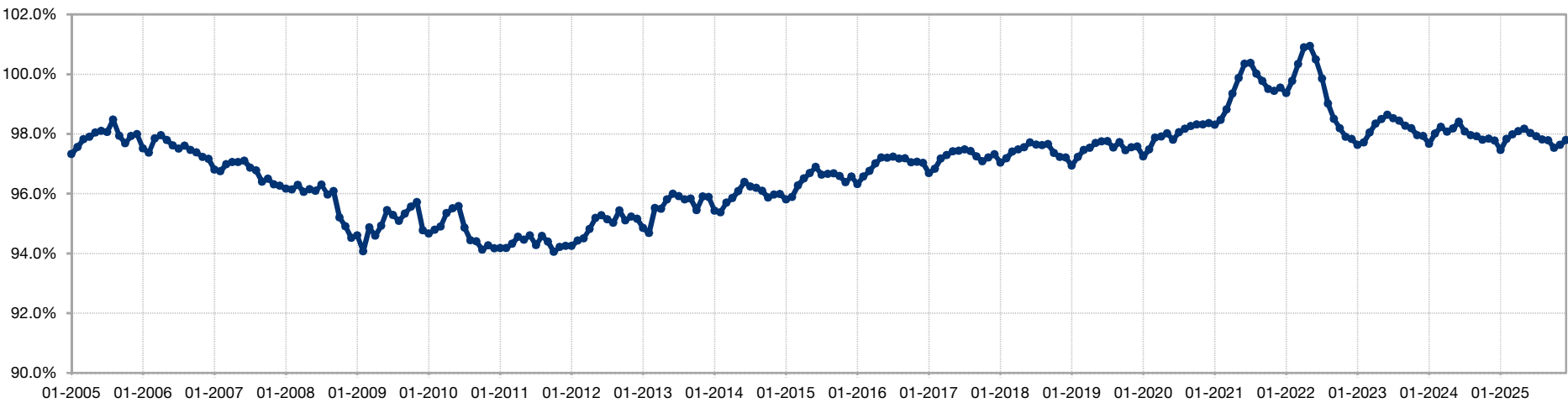
December



Pct. of List Price Received		Prior Year	Percent Change
January 2025	97.5%	97.7%	-0.2%
February 2025	97.8%	98.0%	-0.2%
March 2025	98.0%	98.2%	-0.2%
April 2025	98.1%	98.1%	0.0%
May 2025	98.2%	98.2%	0.0%
June 2025	98.0%	98.4%	-0.4%
July 2025	97.9%	98.1%	-0.2%
August 2025	97.8%	98.0%	-0.2%
September 2025	97.8%	97.9%	-0.1%
October 2025	97.5%	97.8%	-0.3%
November 2025	97.6%	97.8%	-0.2%
December 2025	97.8%	97.8%	0.0%
12-Month Avg*	97.9%	98.0%	-0.1%

* Average 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

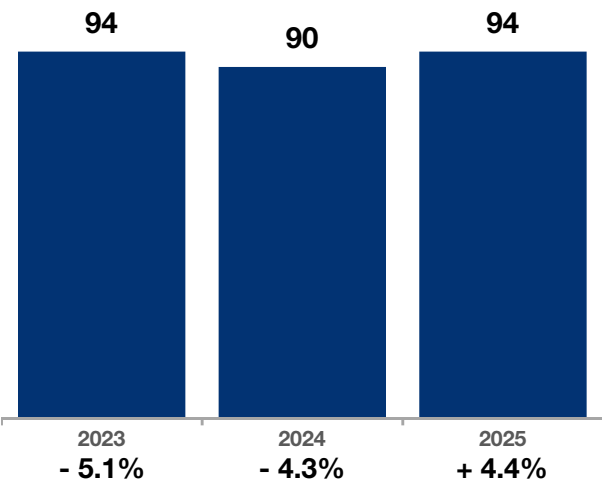


Housing Affordability Index

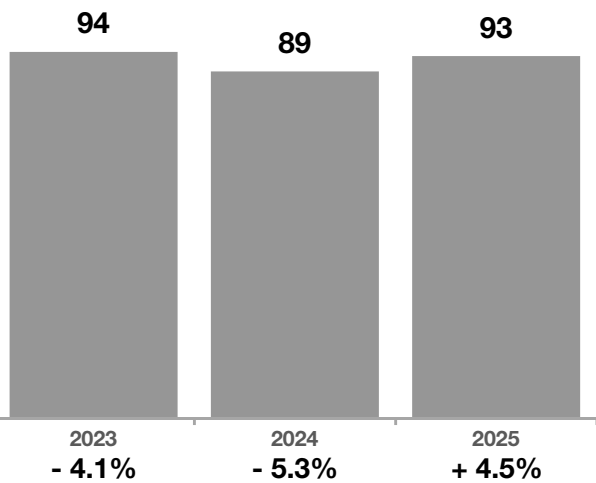
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



December



Year to Date



	Affordability Index	Prior Year	Percent Change
January 2025	88	93	-5.4%
February 2025	91	90	+1.1%
March 2025	91	90	+1.1%
April 2025	88	85	+3.5%
May 2025	87	86	+1.2%
June 2025	87	87	0.0%
July 2025	86	88	-2.3%
August 2025	90	92	-2.2%
September 2025	92	96	-4.2%
October 2025	93	90	+3.3%
November 2025	93	89	+4.5%
December 2025	94	90	+4.4%
12-Month Avg	90	90	+0.4%

Historical Housing Affordability Index by Month

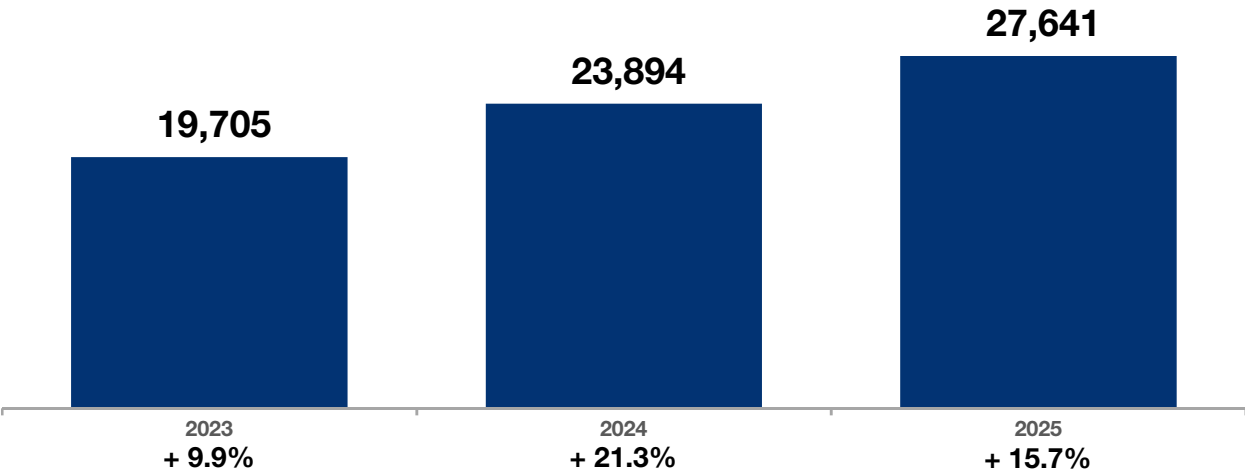


Inventory of Homes for Sale

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



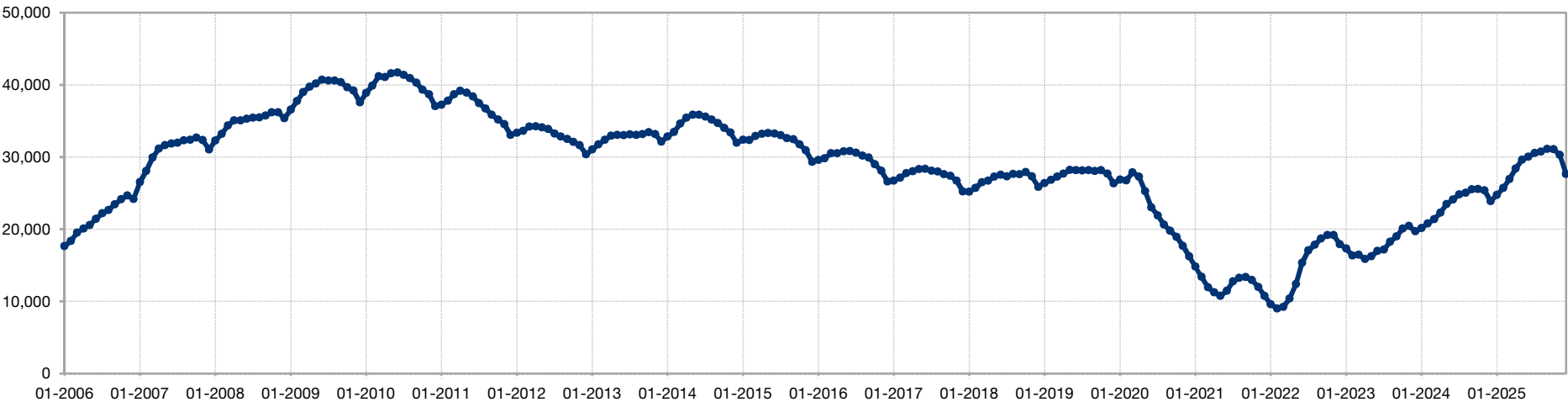
December



Homes for Sale		Prior Year	Percent Change
January 2025	24,741	20,165	+22.7%
February 2025	25,702	20,774	+23.7%
March 2025	26,948	21,394	+26.0%
April 2025	28,382	22,286	+27.4%
May 2025	29,606	23,469	+26.1%
June 2025	30,013	24,093	+24.6%
July 2025	30,548	24,809	+23.1%
August 2025	30,739	25,031	+22.8%
September 2025	31,127	25,527	+21.9%
October 2025	31,081	25,544	+21.7%
November 2025	30,279	25,380	+19.3%
December 2025	27,641	23,894	+15.7%
12-Month Avg*	28,901	23,531	+22.8%

* Homes for Sale for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Historical Inventory of Homes for Sale by Month

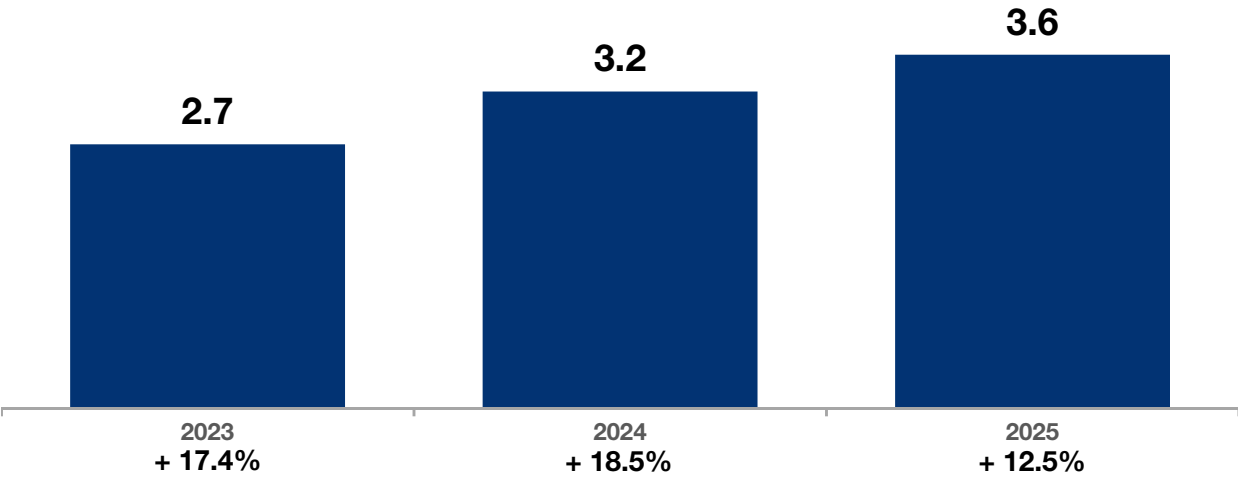


Months Supply of Inventory

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		Prior Year	Percent Change
January 2025	3.4	2.8	+21.4%
February 2025	3.5	2.8	+25.0%
March 2025	3.7	2.9	+27.6%
April 2025	3.9	3.1	+25.8%
May 2025	4.0	3.2	+25.0%
June 2025	4.0	3.3	+21.2%
July 2025	4.1	3.4	+20.6%
August 2025	4.1	3.5	+17.1%
September 2025	4.1	3.5	+17.1%
October 2025	4.1	3.5	+17.1%
November 2025	4.0	3.5	+14.3%
December 2025	3.6	3.2	+12.5%
12-Month Avg*	3.9	3.2	+21.9%

* 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

