

# Monthly Indicators

SOUTH PALM BEACH COUNTY



## 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 decreased 8.9 percent for Single Family homes and 10.2 percent for Townhouse/Condo homes. Pending Sales increased 16.9 percent for Single Family homes and 17.1 percent for Townhouse/Condo homes. Inventory decreased 18.1 percent for Single Family homes and 11.0 percent for Townhouse/Condo homes.

Median Sales Price increased 2.0 percent to \$637,500 for Single Family homes but decreased 8.6 percent to \$265,000 for Townhouse/Condo homes. Days on Market increased 5.7 percent for Single Family homes and 24.0 percent for Townhouse/Condo homes. Months Supply of Inventory decreased 22.0 percent for Single Family homes and 9.6 percent for Townhouse/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

**+ 16.7%**

Change in  
**Closed Sales**  
All Properties

**- 5.6%**

Change in  
**Median Sales Price**  
All Properties

**- 13.5%**

Change in  
**Homes for Sale**  
All Properties

This is a research tool provided by BeachesMLS, a subsidiary of Broward, Palm Beaches & St. Lucie Realtors®. Percent changes are calculated using rounded figures.

Single Family Market Overview	2
Townhouse/Condo Market Overview	3
Closed Sales	4
Median Sales Price	5
Average Sales Price	6
Dollar Volume of Closed Sales (in millions)	7
Percent of Original List Price Received	8
Housing Affordability Index	9
Median Time to Contract	10
Pending Sales	11
New Listings	12
Inventory of Homes for Sale	13
Months Supply of Inventory	14
Total Market Overview	15



# Single Family Market Overview

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



Key Metrics	Historical Sparkbars	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
<b>Closed Sales</b>		524	<b>583</b>	+ 11.3%	6,444	<b>6,739</b>	+ 4.6%
<b>Median Sales Price</b>		\$625,000	<b>\$637,500</b>	+ 2.0%	\$650,000	<b>\$640,000</b>	- 1.5%
<b>Average Sales Price</b>		\$985,533	<b>\$1,221,324</b>	+ 23.9%	\$1,132,839	<b>\$1,131,890</b>	- 0.1%
<b>Dollar Volume of Closed Sales (in millions)</b>		\$515	<b>\$711</b>	+ 38.1%	\$7,290	<b>\$7,622</b>	+ 4.6%
<b>Percent of Original List Price Received</b>		92.9%	<b>93.0%</b>	+ 0.1%	92.8%	<b>92.2%</b>	- 0.6%
<b>Housing Affordability Index</b>		55	<b>57</b>	+ 3.6%	53	<b>57</b>	+ 7.5%
<b>Median Time to Contract</b>		35	<b>37</b>	+ 5.7%	33	<b>37</b>	+ 12.1%
<b>Pending Sales</b>		409	<b>478</b>	+ 16.9%	6,487	<b>6,882</b>	+ 6.1%
<b>New Listings</b>		688	<b>627</b>	- 8.9%	10,406	<b>10,358</b>	- 0.5%
<b>Inventory of Homes for Sale</b>		2,700	<b>2,210</b>	- 18.1%	—	—	—
<b>Months Supply of Inventory</b>		5.0	<b>3.9</b>	- 22.0%	—	—	—

# Townhouse/Condo Market Overview

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



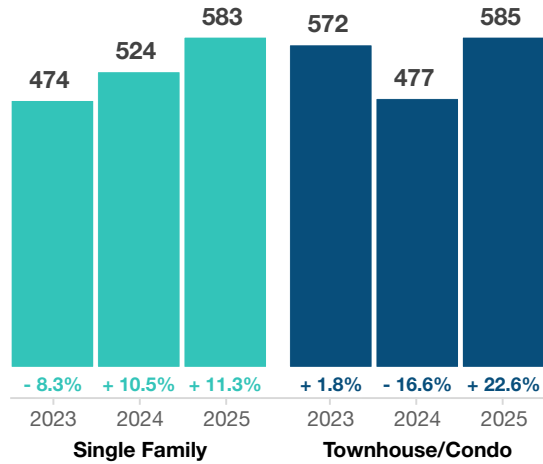
Key Metrics	Historical Sparkbars	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
<b>Closed Sales</b>		477	<b>585</b>	+ 22.6%	7,156	<b>6,975</b>	- 2.5%
<b>Median Sales Price</b>		\$289,800	<b>\$265,000</b>	- 8.6%	\$311,250	<b>\$290,000</b>	- 6.8%
<b>Average Sales Price</b>		\$421,753	<b>\$406,317</b>	- 3.7%	\$459,492	<b>\$488,654</b>	+ 6.3%
<b>Dollar Volume of Closed Sales (in millions)</b>		\$201	<b>\$236</b>	+ 17.4%	\$3,284	<b>\$3,398</b>	+ 3.5%
<b>Percent of Original List Price Received</b>		89.6%	<b>88.7%</b>	- 1.0%	90.7%	<b>88.5%</b>	- 2.4%
<b>Housing Affordability Index</b>		119	<b>137</b>	+ 15.1%	110	<b>126</b>	+ 14.5%
<b>Median Time to Contract</b>		50	<b>62</b>	+ 24.0%	43	<b>59</b>	+ 37.2%
<b>Pending Sales</b>		427	<b>500</b>	+ 17.1%	7,142	<b>6,975</b>	- 2.3%
<b>New Listings</b>		968	<b>869</b>	- 10.2%	14,642	<b>13,833</b>	- 5.5%
<b>Inventory of Homes for Sale</b>		4,920	<b>4,379</b>	- 11.0%	—	—	—
<b>Months Supply of Inventory</b>		8.3	<b>7.5</b>	- 9.6%	—	—	—

# Closed Sales

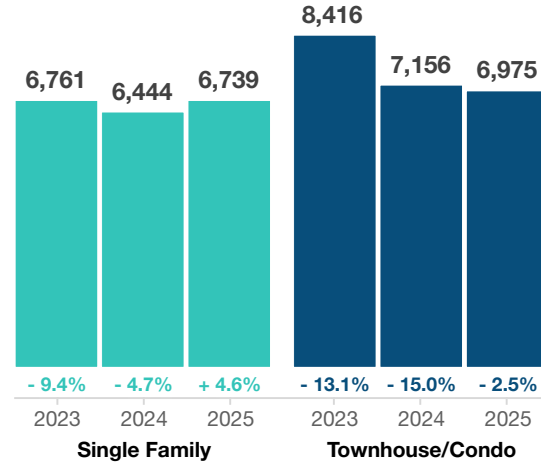
A count of the actual sales that closed in a given month.



## December

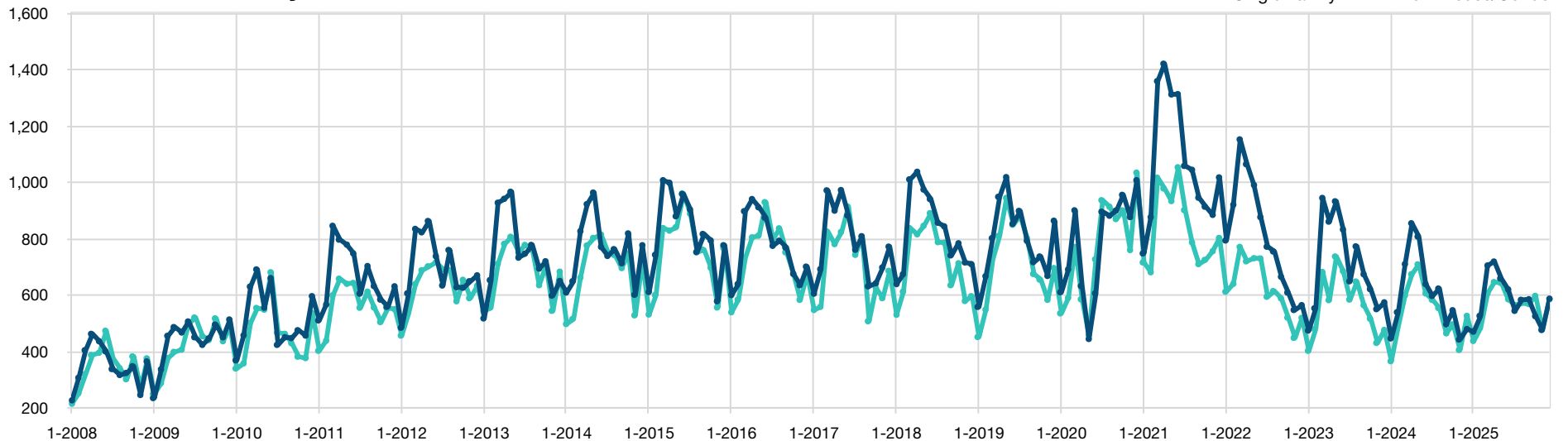


## Year to Date



Closed Sales	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	435	+ 19.8%	468	+ 5.4%
Feb-2025	481	- 0.8%	524	- 2.4%
Mar-2025	604	+ 1.2%	703	- 0.7%
Apr-2025	644	- 4.2%	717	- 15.9%
May-2025	642	- 9.2%	657	- 18.5%
Jun-2025	583	- 3.5%	618	- 3.0%
Jul-2025	562	- 3.3%	542	- 8.9%
Aug-2025	569	+ 3.1%	581	- 6.4%
Sep-2025	566	+ 22.5%	583	+ 18.0%
Oct-2025	595	+ 20.4%	523	- 3.9%
Nov-2025	475	+ 17.9%	474	+ 7.7%
<b>Dec-2025</b>	<b>583</b>	<b>+ 11.3%</b>	<b>585</b>	<b>+ 22.6%</b>
12-Month Avg	562	+ 4.7%	581	- 2.5%

## Historical Closed Sales by Month

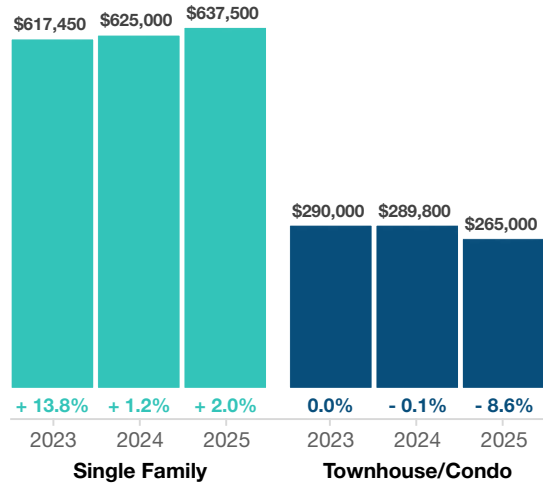


# Median Sales Price

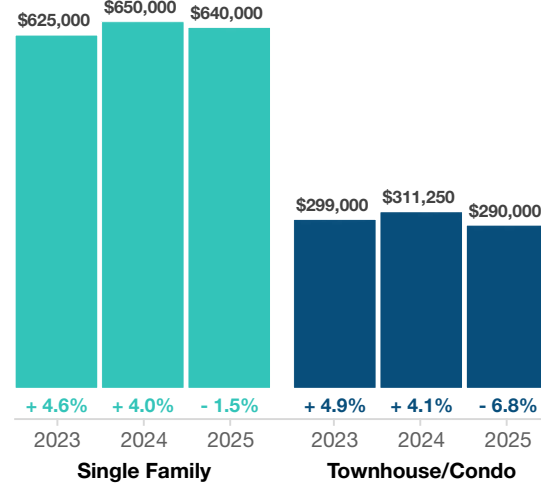
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



## December



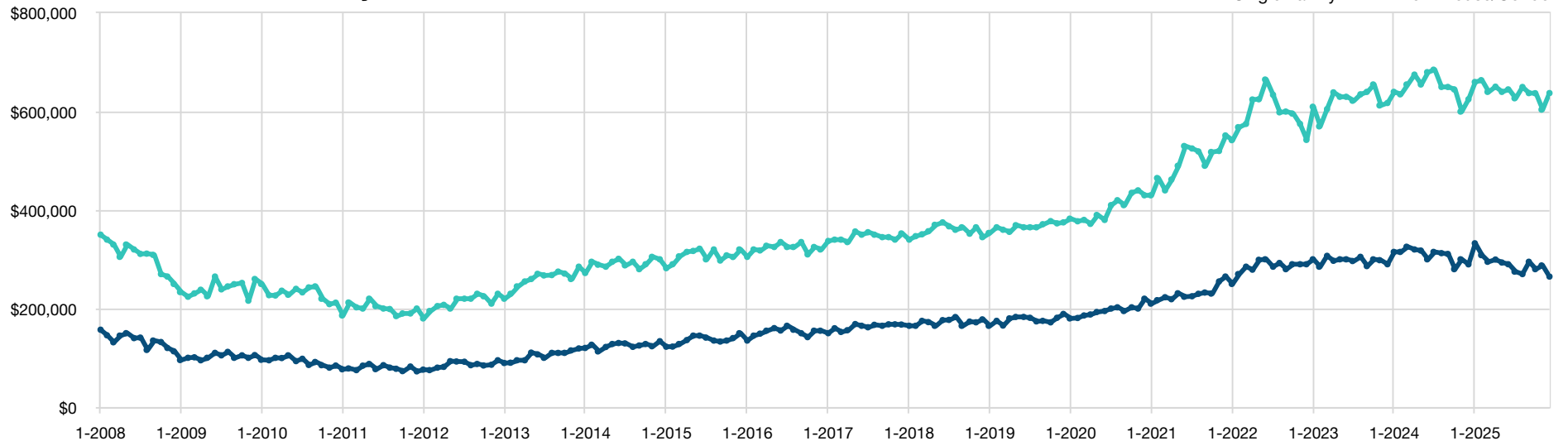
## Year to Date



Median Sales Price	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	\$660,000	+ 3.1%	\$332,500	+ 5.6%
Feb-2025	\$663,750	+ 4.5%	\$308,500	- 2.1%
Mar-2025	\$640,000	- 2.3%	\$295,000	- 9.4%
Apr-2025	\$650,500	- 3.6%	\$299,500	- 6.4%
May-2025	\$640,000	- 2.3%	\$293,500	- 7.6%
Jun-2025	\$645,000	- 5.1%	\$290,000	- 3.3%
Jul-2025	\$627,000	- 8.5%	\$275,000	- 12.7%
Aug-2025	\$649,900	- 0.0%	\$270,000	- 13.6%
Sep-2025	\$637,500	- 1.9%	\$295,000	- 5.1%
Oct-2025	\$637,250	- 1.2%	\$280,000	0.0%
Nov-2025	\$604,000	+ 0.7%	\$287,500	- 4.2%
<b>Dec-2025</b>	<b>\$637,500</b>	<b>+ 2.0%</b>	<b>\$265,000</b>	<b>- 8.6%</b>
12-Month Avg*	\$640,000	- 1.5%	\$290,000	- 6.8%

\* 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

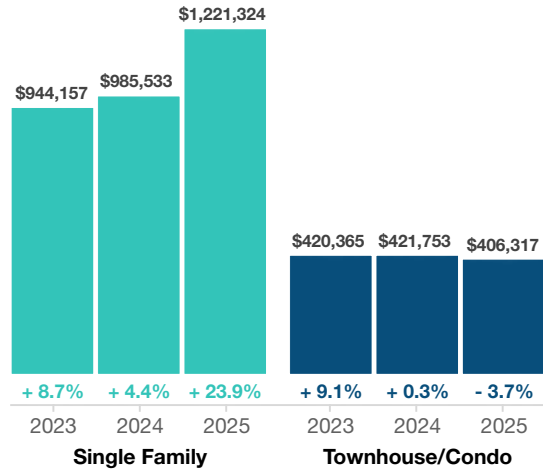


# Average Sales Price

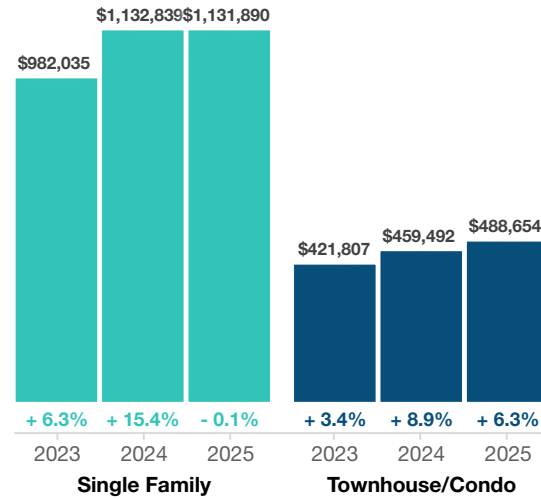
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



## December



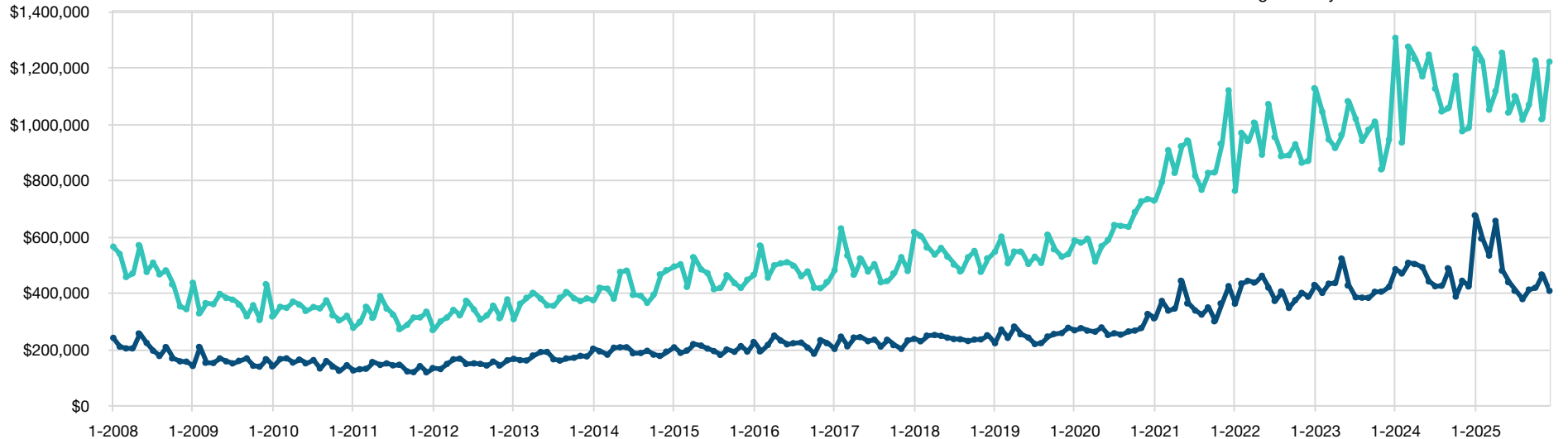
## Year to Date



Avg. Sales Price	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	\$1,266,615	- 3.0%	\$674,574	+ 39.7%
Feb-2025	\$1,225,107	+ 31.2%	\$592,015	+ 26.5%
Mar-2025	\$1,050,443	- 17.6%	\$531,594	+ 5.1%
Apr-2025	\$1,116,521	- 9.3%	\$654,950	+ 30.6%
May-2025	\$1,253,022	+ 7.2%	\$478,237	- 2.4%
Jun-2025	\$1,040,376	- 16.5%	\$437,050	- 0.6%
Jul-2025	\$1,098,625	- 2.4%	\$406,443	- 3.8%
Aug-2025	\$1,014,944	- 2.8%	\$376,683	- 11.2%
Sep-2025	\$1,068,034	+ 1.2%	\$410,699	- 15.6%
Oct-2025	\$1,225,478	+ 4.6%	\$417,250	+ 8.2%
Nov-2025	\$1,016,452	+ 4.4%	\$464,438	+ 5.1%
<b>Dec-2025</b>	<b>\$1,221,324</b>	<b>+ 23.9%</b>	<b>\$406,317</b>	<b>- 3.7%</b>
12-Month Avg*	\$1,131,890	- 0.1%	\$488,654	+ 6.3%

\* 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

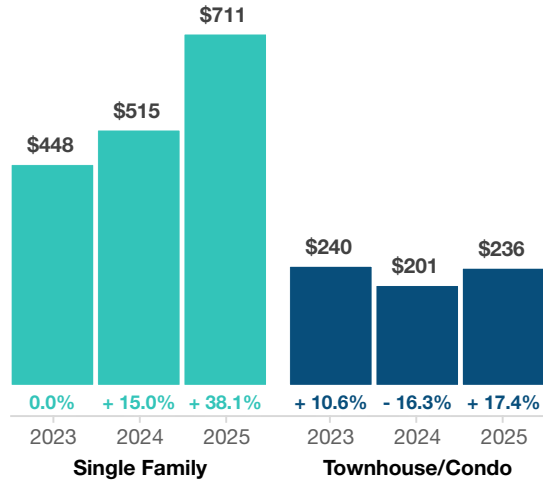


# Dollar Volume of Closed Sales (in millions)

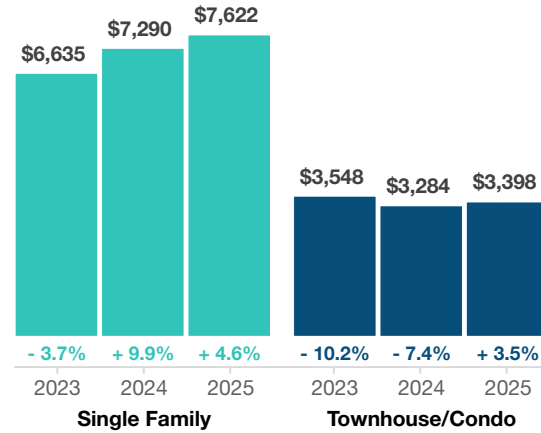
The total dollar volume for all closed sales in a given month (in millions). Does not account for seller concessions.



## December

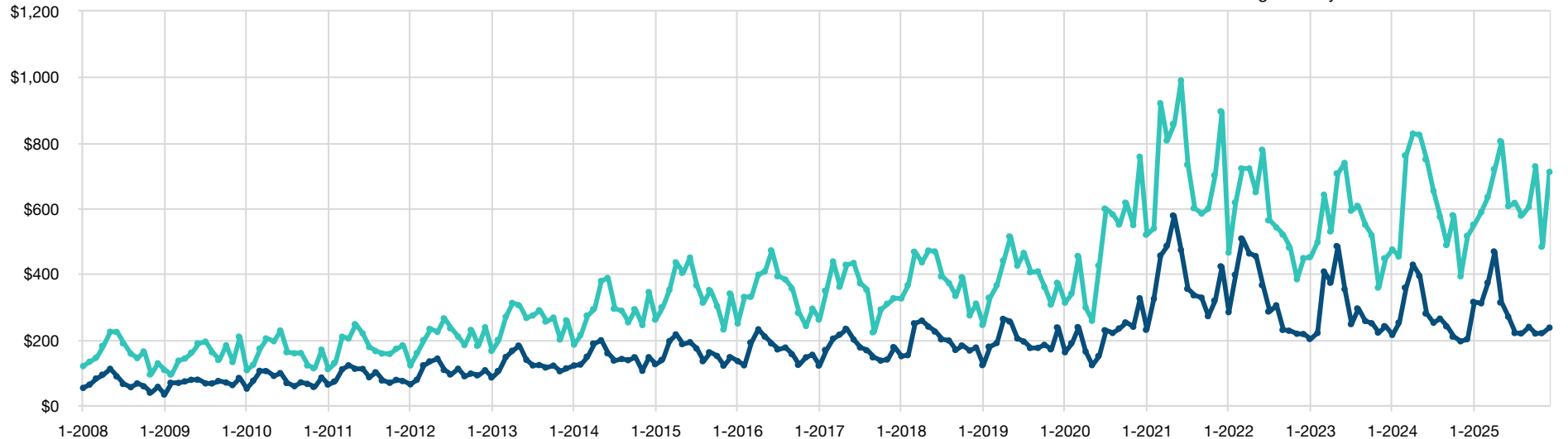


## Year to Date



\$ Volume of Closed Sales (in millions)	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	\$550	+ 16.0%	\$314	+ 46.7%
Feb-2025	\$588	+ 29.8%	\$310	+ 23.5%
Mar-2025	\$634	- 16.7%	\$373	+ 4.2%
Apr-2025	\$719	- 13.1%	\$468	+ 9.3%
May-2025	\$804	- 2.4%	\$313	- 20.6%
Jun-2025	\$607	- 19.0%	\$269	- 3.6%
Jul-2025	\$616	- 5.7%	\$220	- 12.4%
Aug-2025	\$578	+ 0.7%	\$218	- 17.4%
Sep-2025	\$605	+ 24.0%	\$238	- 0.8%
Oct-2025	\$728	+ 25.7%	\$218	+ 4.3%
Nov-2025	\$483	+ 22.9%	\$219	+ 12.3%
<b>Dec-2025</b>	<b>\$711</b>	<b>+ 38.1%</b>	<b>\$236</b>	<b>+ 17.4%</b>
12-Month Avg	\$635	+ 4.6%	\$283	+ 3.3%

## Historical Dollar Volume of Closed Sales (in millions) by Month

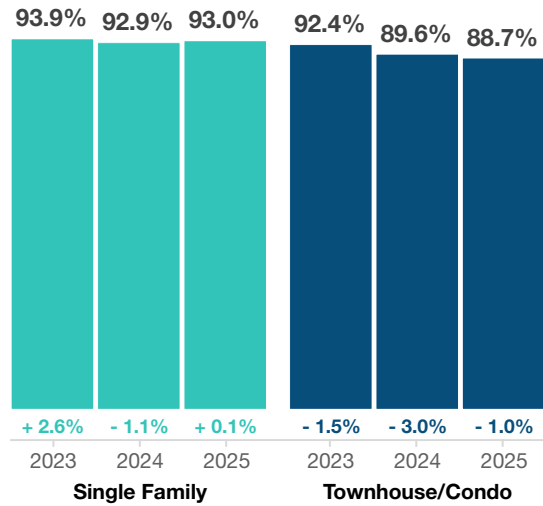


# Percent of Original List Price Received

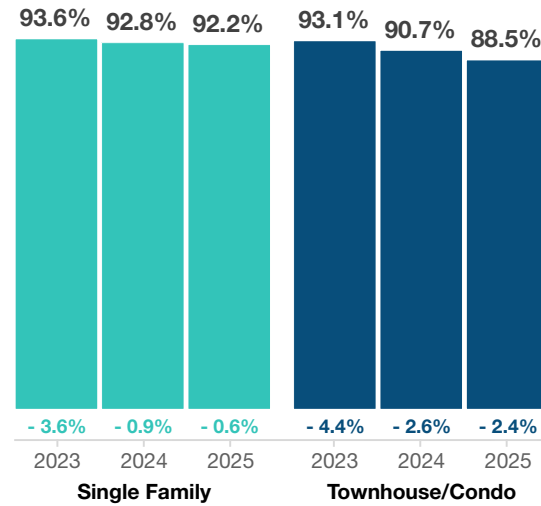
Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



## December



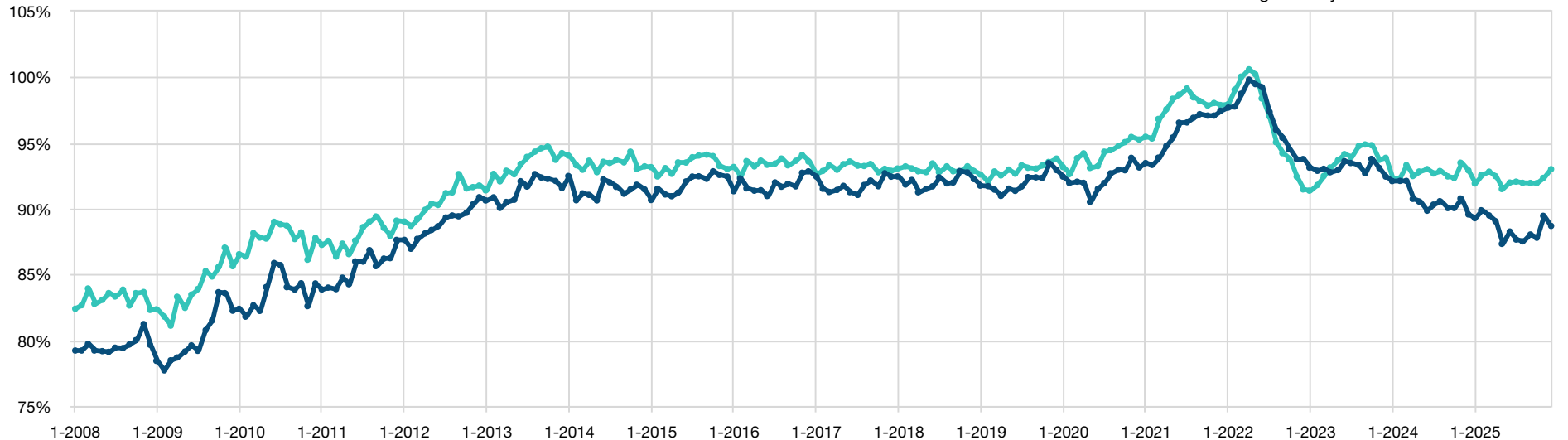
## Year to Date



Pct. of Orig. Price Received	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	91.9%	- 0.3%	89.3%	- 3.0%
Feb-2025	92.6%	+ 0.3%	89.9%	- 2.4%
Mar-2025	92.8%	- 0.5%	89.5%	- 2.8%
Apr-2025	92.5%	0.0%	89.0%	- 1.9%
May-2025	91.5%	- 1.4%	87.3%	- 3.5%
Jun-2025	92.0%	- 1.1%	88.3%	- 1.7%
Jul-2025	92.1%	- 0.6%	87.7%	- 2.9%
Aug-2025	92.0%	- 1.0%	87.5%	- 3.4%
Sep-2025	92.0%	- 0.5%	88.0%	- 2.3%
Oct-2025	91.9%	- 0.4%	87.8%	- 2.6%
Nov-2025	92.3%	- 1.3%	89.5%	- 1.4%
<b>Dec-2025</b>	<b>93.0%</b>	<b>+ 0.1%</b>	<b>88.7%</b>	<b>- 1.0%</b>
12-Month Avg*	92.2%	- 0.6%	88.5%	- 2.4%

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

## Historical Percent of Original List Price Received by Month

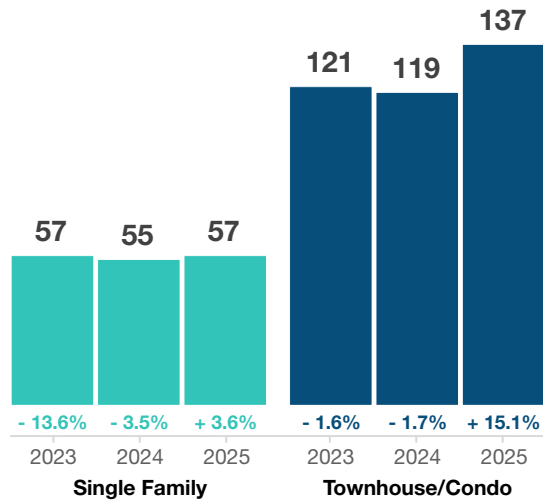


# Housing Affordability Index

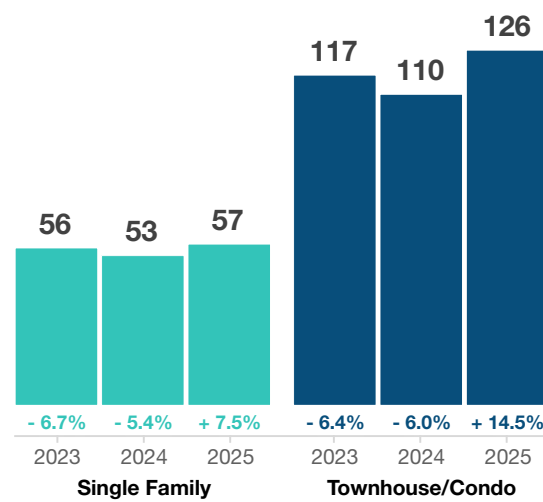
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



## December

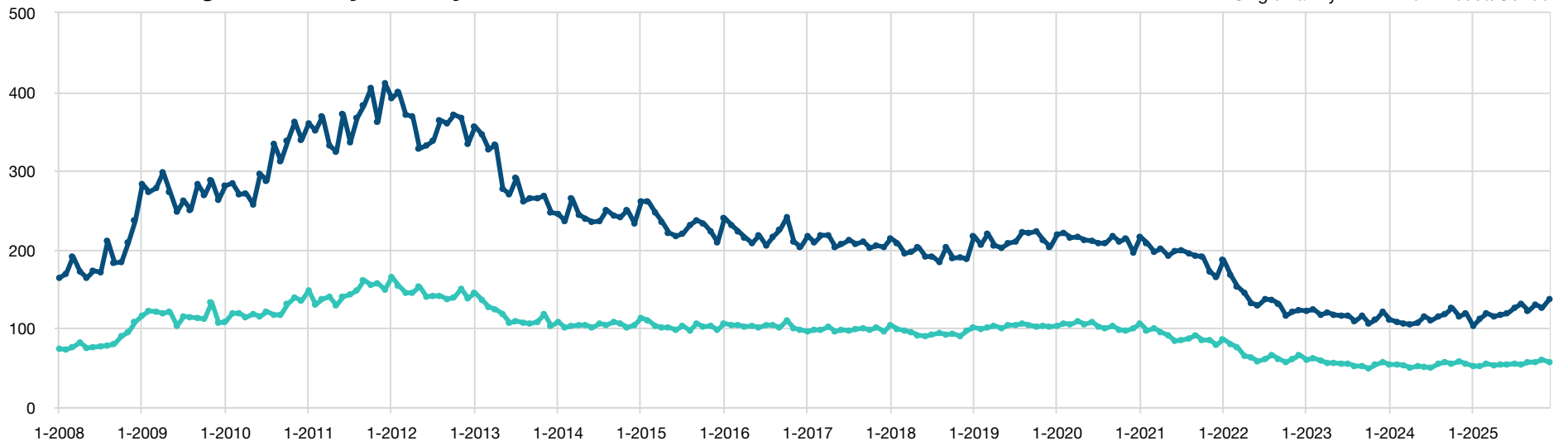


## Year to Date



Affordability Index	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	52	- 3.7%	103	- 7.2%
Feb-2025	52	- 3.7%	112	+ 3.7%
Mar-2025	55	+ 3.8%	119	+ 12.3%
Apr-2025	53	+ 6.0%	115	+ 9.5%
May-2025	54	+ 3.8%	117	+ 9.3%
Jun-2025	54	+ 5.9%	119	+ 3.5%
Jul-2025	55	+ 10.0%	126	+ 14.5%
Aug-2025	54	- 1.8%	131	+ 13.9%
Sep-2025	57	0.0%	122	+ 3.4%
Oct-2025	57	+ 3.6%	130	+ 3.2%
Nov-2025	60	+ 3.4%	126	+ 9.6%
<b>Dec-2025</b>	<b>57</b>	<b>+ 3.6%</b>	<b>137</b>	<b>+ 15.1%</b>
12-Month Avg	55	+ 1.9%	121	+ 7.1%

## Historical Housing Affordability Index by Month

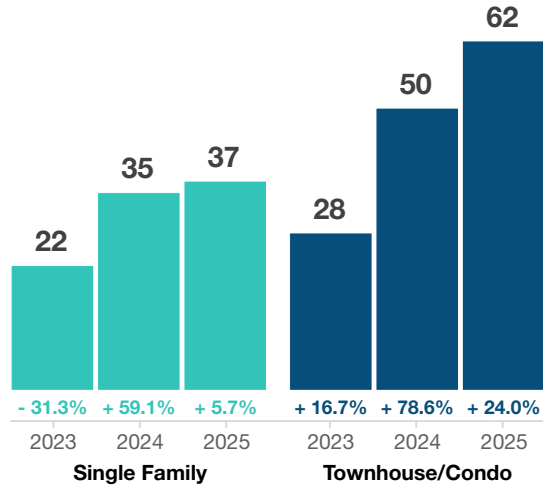


# Median Time to Contract

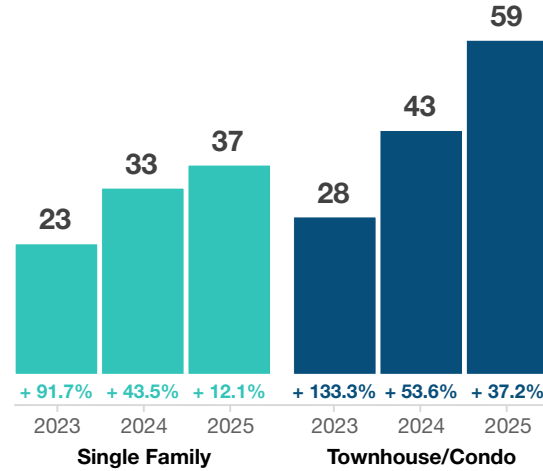
Median number of days between when a property is listed and when an offer is accepted in a given month.



## December



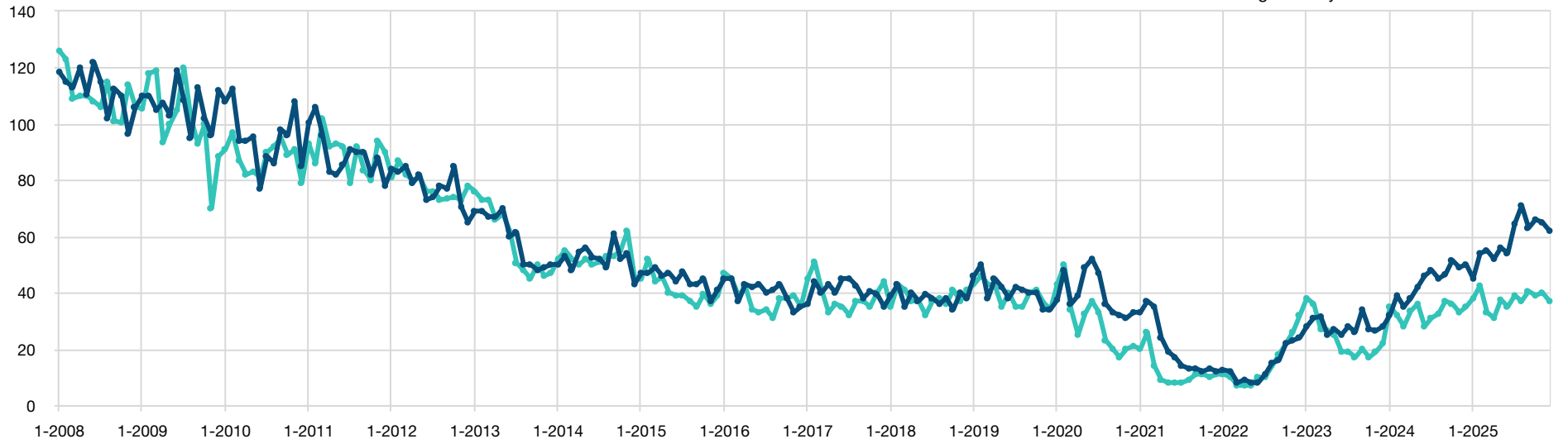
## Year to Date



Median Time to Contract	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	38	+ 8.6%	45	+ 40.6%
Feb-2025	43	+ 34.4%	54	+ 38.5%
Mar-2025	33	+ 17.9%	55	+ 57.1%
Apr-2025	31	- 8.8%	52	+ 36.8%
May-2025	38	+ 5.6%	56	+ 33.3%
Jun-2025	35	+ 25.0%	54	+ 17.4%
Jul-2025	39	+ 25.8%	65	+ 35.4%
Aug-2025	37	+ 12.1%	71	+ 57.8%
Sep-2025	41	+ 10.8%	63	+ 34.0%
Oct-2025	39	+ 8.3%	66	+ 26.9%
Nov-2025	40	+ 21.2%	65	+ 32.7%
<b>Dec-2025</b>	<b>37</b>	<b>+ 5.7%</b>	<b>62</b>	<b>+ 24.0%</b>
12-Month Avg*	37	+ 12.1%	59	+ 37.2%

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

## Historical Median Time to Contract by Month

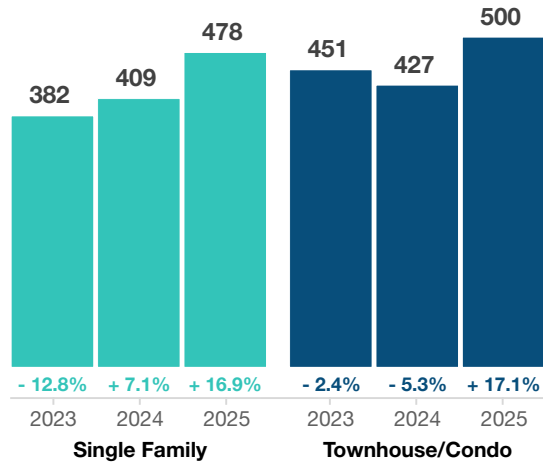


# Pending Sales

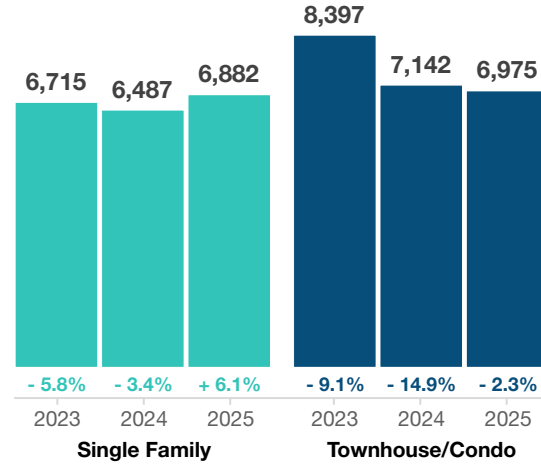
A count of the properties on which offers have been accepted in a given month.



## December

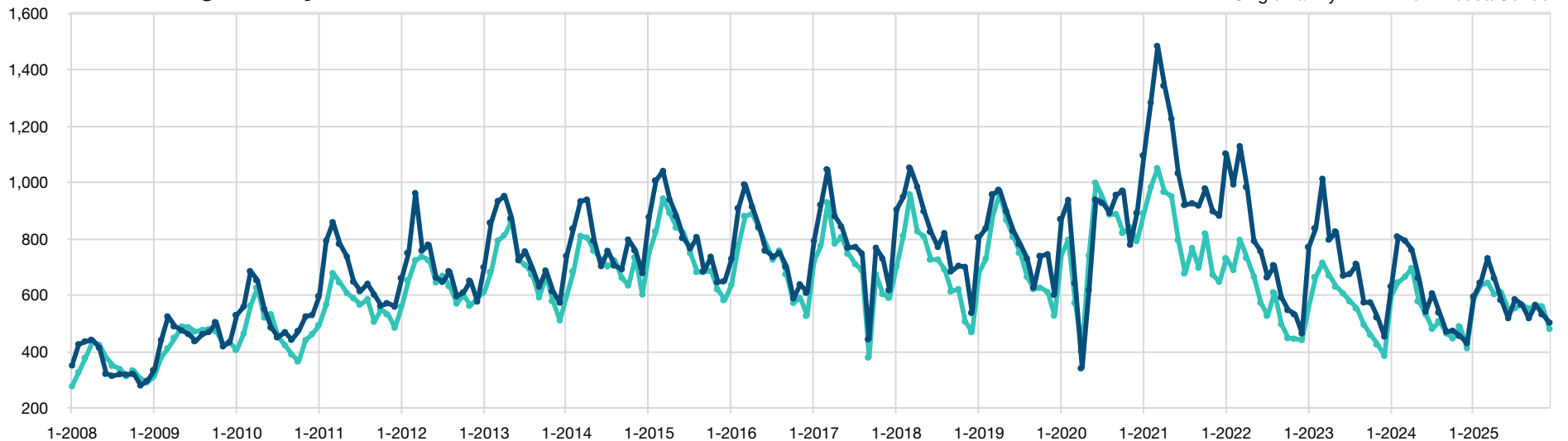


## Year to Date



Pending Sales	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	585	- 1.8%	593	- 5.7%
Feb-2025	632	- 1.7%	642	- 20.3%
Mar-2025	642	- 3.2%	729	- 7.8%
Apr-2025	601	- 13.4%	658	- 13.3%
May-2025	609	+ 5.7%	581	- 11.8%
Jun-2025	549	+ 3.6%	516	- 4.3%
Jul-2025	551	+ 15.3%	583	- 3.5%
Aug-2025	566	+ 12.1%	564	+ 5.2%
Sep-2025	549	+ 18.8%	516	+ 10.3%
Oct-2025	562	+ 26.6%	563	+ 19.5%
Nov-2025	558	+ 14.6%	530	+ 17.0%
<b>Dec-2025</b>	<b>478</b>	<b>+ 16.9%</b>	<b>500</b>	<b>+ 17.1%</b>
12-Month Avg	574	+ 6.1%	581	- 2.4%

## Historical Pending Sales by Month

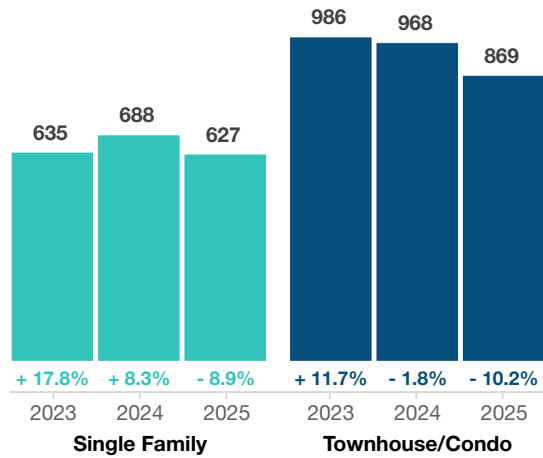


# New Listings

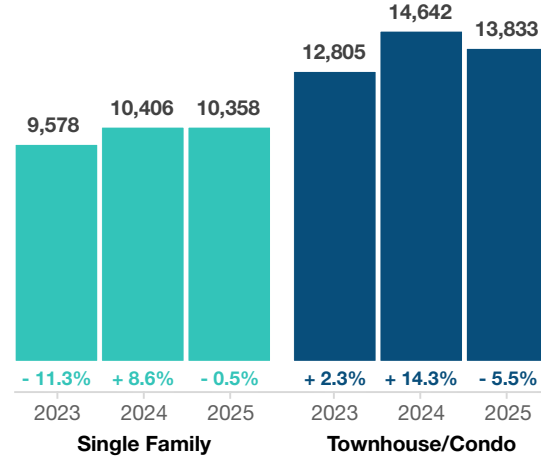
A count of the properties that have been newly listed on the market in a given month.



## December

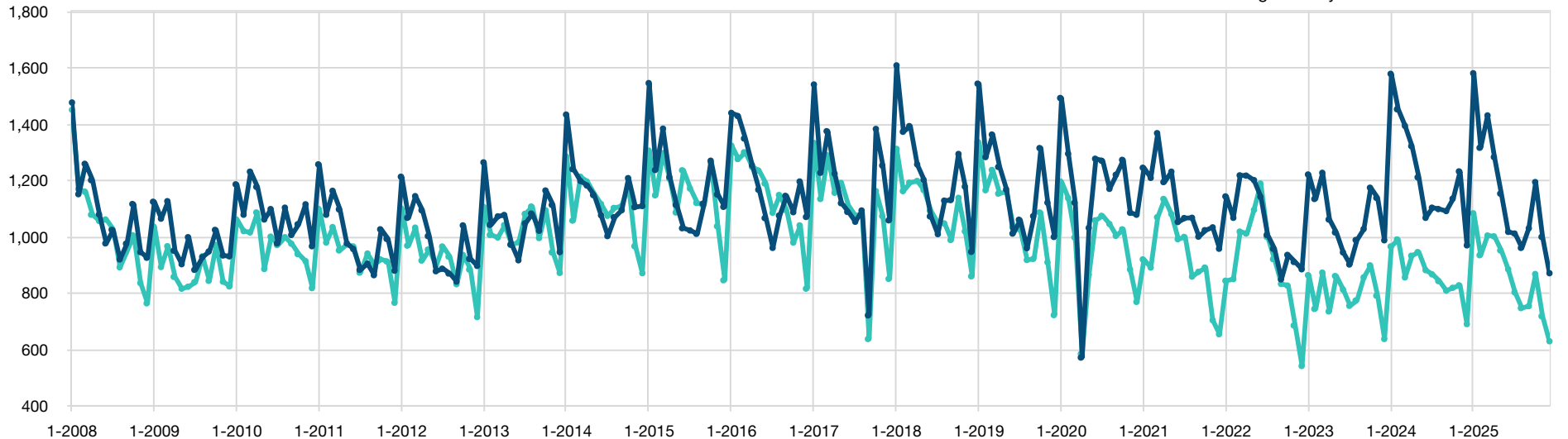


## Year to Date



New Listings	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	1,082	+ 12.2%	1,580	+ 0.1%
Feb-2025	933	- 5.7%	1,315	- 9.4%
Mar-2025	1,003	+ 17.4%	1,430	+ 2.7%
Apr-2025	1,000	+ 7.4%	1,282	- 3.0%
May-2025	950	+ 0.6%	1,152	- 4.8%
Jun-2025	883	+ 0.3%	1,016	- 4.7%
Jul-2025	801	- 7.4%	1,010	- 8.3%
Aug-2025	745	- 11.4%	959	- 12.6%
Sep-2025	752	- 6.8%	1,029	- 5.6%
Oct-2025	866	+ 6.0%	1,193	+ 5.2%
Nov-2025	716	- 13.3%	998	- 18.9%
<b>Dec-2025</b>	<b>627</b>	<b>- 8.9%</b>	<b>869</b>	<b>- 10.2%</b>
12-Month Avg	863	- 0.5%	1,153	- 5.5%

## Historical New Listings by Month

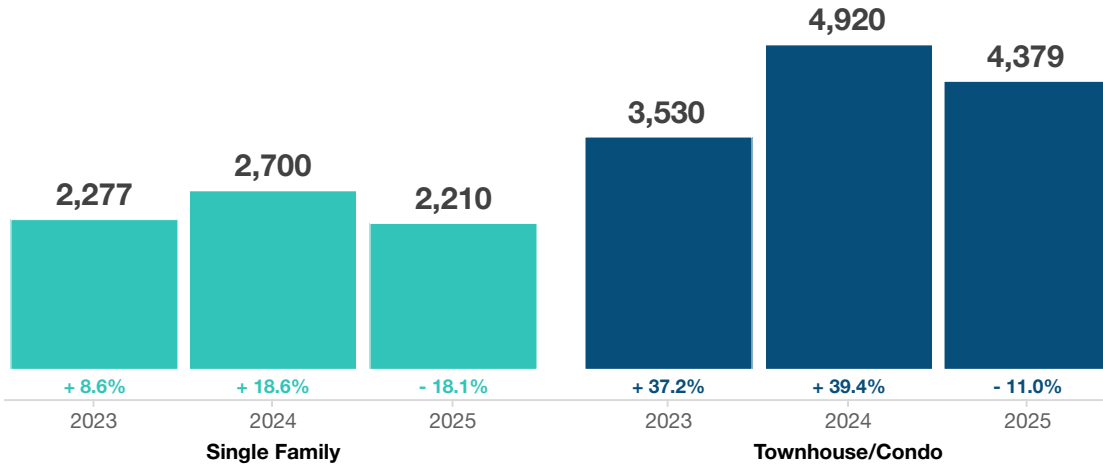


# Inventory of Homes for Sale

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

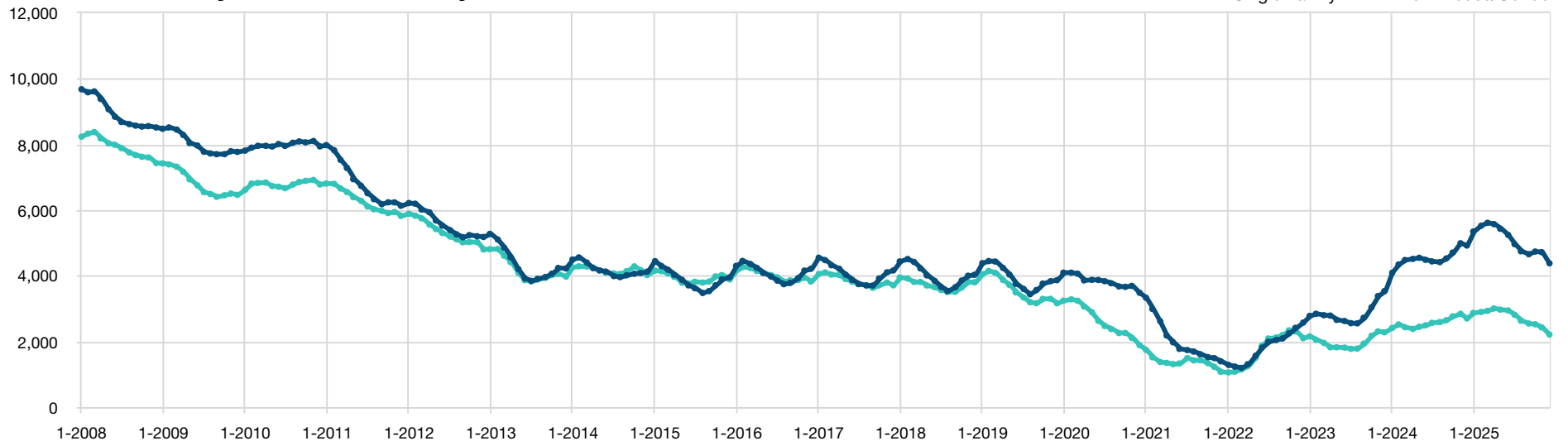


## December



Homes for Sale	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	2,867	+ 19.0%	5,346	+ 30.7%
Feb-2025	2,896	+ 15.1%	5,523	+ 27.2%
Mar-2025	2,930	+ 20.6%	5,612	+ 25.3%
Apr-2025	3,003	+ 26.1%	5,572	+ 23.5%
May-2025	2,967	+ 21.3%	5,430	+ 19.4%
Jun-2025	2,941	+ 18.1%	5,243	+ 16.9%
Jul-2025	2,810	+ 9.5%	4,962	+ 11.9%
Aug-2025	2,629	+ 1.6%	4,745	+ 7.5%
Sep-2025	2,545	- 3.7%	4,655	+ 2.9%
Oct-2025	2,521	- 8.7%	4,736	+ 0.7%
Nov-2025	2,429	- 14.5%	4,718	- 5.4%
<b>Dec-2025</b>	<b>2,210</b>	<b>- 18.1%</b>	<b>4,379</b>	<b>- 11.0%</b>
12-Month Avg	2,729	+ 6.4%	5,077	+ 11.9%

## Historical Inventory of Homes for Sale by Month

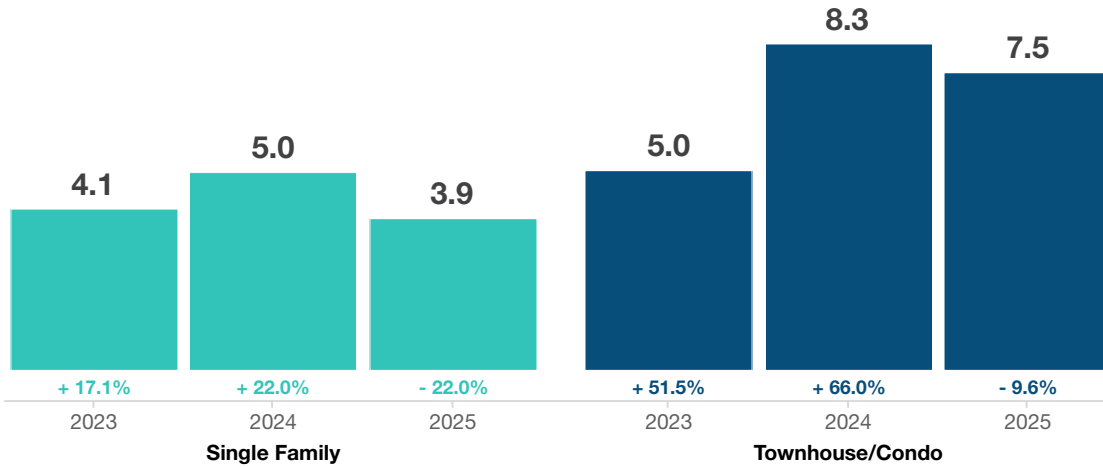


# Months Supply of Inventory

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.



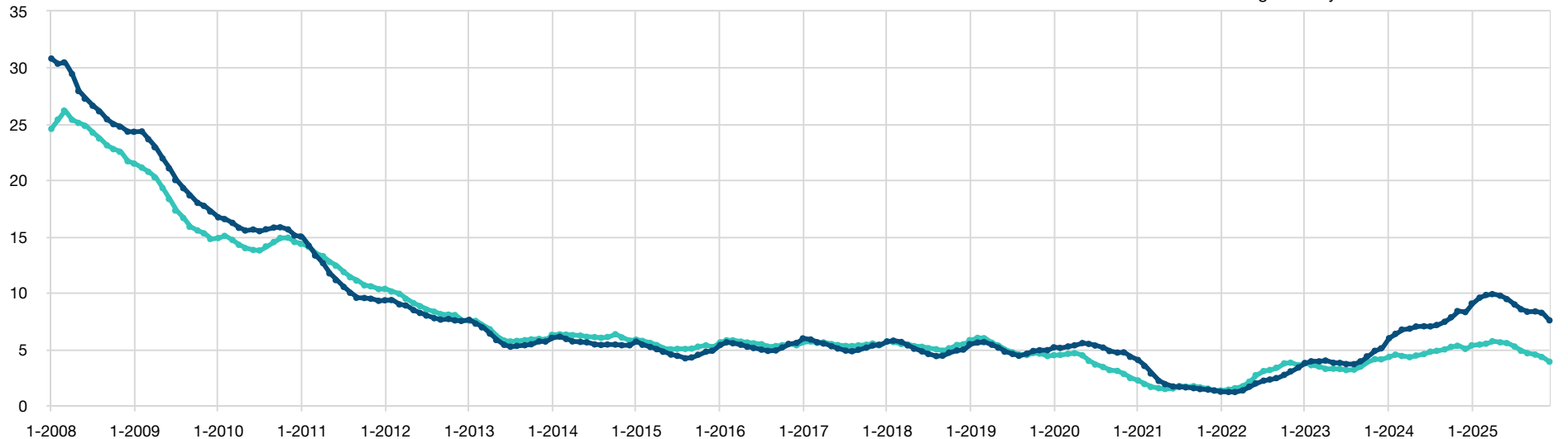
## December



Months Supply	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	5.3	+ 23.3%	9.0	+ 52.5%
Feb-2025	5.4	+ 20.0%	9.5	+ 50.8%
Mar-2025	5.5	+ 25.0%	9.8	+ 46.3%
Apr-2025	5.7	+ 32.6%	9.9	+ 45.6%
May-2025	5.6	+ 27.3%	9.7	+ 38.6%
Jun-2025	5.5	+ 22.2%	9.4	+ 34.3%
Jul-2025	5.2	+ 10.6%	8.9	+ 27.1%
Aug-2025	4.8	0.0%	8.5	+ 19.7%
Sep-2025	4.6	- 8.0%	8.3	+ 12.2%
Oct-2025	4.5	- 13.5%	8.3	+ 6.4%
Nov-2025	4.3	- 18.9%	8.2	- 2.4%
<b>Dec-2025</b>	<b>3.9</b>	<b>- 22.0%</b>	<b>7.5</b>	<b>- 9.6%</b>
12-Month Avg*	5.0	+ 6.9%	8.9	+ 25.1%

\* 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



# Total Market Overview

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



Key Metrics	Historical Sparkbars	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
<b>Closed Sales</b>		1,001	<b>1,168</b>	+ 16.7%	13,600	<b>13,714</b>	+ 0.8%
<b>Median Sales Price</b>		\$480,000	<b>\$453,000</b>	- 5.6%	\$460,000	<b>\$460,000</b>	0.0%
<b>Average Sales Price</b>		\$716,905	<b>\$814,171</b>	+ 13.6%	\$778,540	<b>\$805,103</b>	+ 3.4%
<b>Dollar Volume of Closed Sales (in millions)</b>		\$716	<b>\$947</b>	+ 32.3%	\$10,573	<b>\$11,020</b>	+ 4.2%
<b>Percent of Original List Price Received</b>		91.3%	<b>90.9%</b>	- 0.4%	91.7%	<b>90.3%</b>	- 1.5%
<b>Housing Affordability Index</b>		72	<b>80</b>	+ 11.1%	75	<b>79</b>	+ 5.3%
<b>Median Time to Contract</b>		42	<b>49</b>	+ 16.7%	38	<b>47</b>	+ 23.7%
<b>Pending Sales</b>		836	<b>978</b>	+ 17.0%	13,629	<b>13,857</b>	+ 1.7%
<b>New Listings</b>		1,656	<b>1,496</b>	- 9.7%	25,048	<b>24,191</b>	- 3.4%
<b>Inventory of Homes for Sale</b>		7,620	<b>6,589</b>	- 13.5%	—	—	—
<b>Months Supply of Inventory</b>		6.7	<b>5.7</b>	- 14.9%	—	—	—

Single Family and Townhouse/Condo Properties