

Monthly Indicators



November 2025

U.S. sales of existing homes rose 1.2% from the previous month to a seasonally adjusted annual rate of 4.10 million, according to the National Association of REALTORS® (NAR), as buyers took advantage of lower mortgage rates this fall. Sales increased in the Midwest and South, held steady in the Northeast, and edged down in the West. Year-over-year, sales were up 1.7%, with gains in the Northeast, Midwest, and South, while the West posted a decline.

- Single Family - Existing Homes Closed Sales were down 13.1 percent to 338.
- Single Family - New Construction Closed Sales were up 8.3 percent to 130.
- Townhouse/Condo Closed Sales were up 23.8 percent to 26.

- Single Family - Existing Homes Median Sales Price increased 7.9 percent to \$270,000.
- Single Family - New Construction Median Sales Price decreased 0.4 percent to \$344,000.
- Townhouse/Condo Median Sales Price increased 40.6 percent to \$253,000.

Nationally, inventory dipped 0.7% month-over-month but rose 10.9% year-over-year, totaling 1.52 million units, according to NAR. At the current sales pace, supply stands at 4.4 months, slightly below last month's level but higher than the 4.1 months recorded a year ago. Supported by modest inventory levels, prices continue to rise, with the national median existing-home price increasing 2.1% year-over-year to \$415,200, marking 28 consecutive months of annual gains.

Quick Facts

- 6.8% **+ 8.5%** **+ 9.9%**

One-Year Change in Closed Sales All Properties	One-Year Change in Median Sales Price All Properties	One-Year Change in Homes for Sale All Properties
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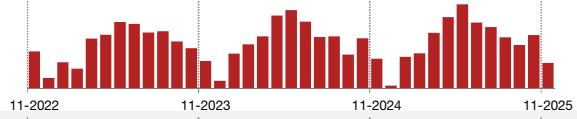
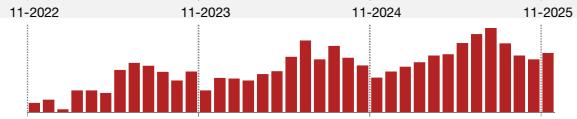
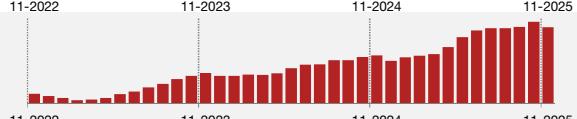
Residential real estate activity in the Longleaf Pine service area only comprised of single family properties, townhouses and condominiums combined. Percent changes are calculated using rounded figures.

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Single Family - Existing Market Overview

Key metrics for **Single Family - Existing Properties Only**, excluding Manufactured Housing, for the report month and for year-to-date (YTD) starting from the first of the year.

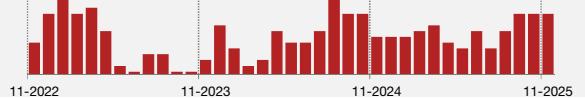
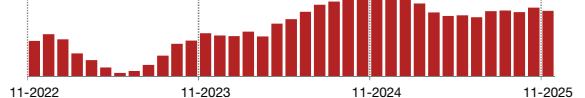
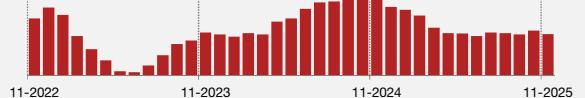


Key Metrics	Historical Sparklines	11-2024		11-2025	Percent Change	YTD 2024		YTD 2025	Percent Change
		11-2024	11-2025	11-2025		YTD 2024	YTD 2025	YTD 2025	
New Listings		534	513	- 3.9%	7,163	7,230	7,230	+ 0.9%	
Pending Sales		369	431	+ 16.8%	5,463	4,981	4,981	- 8.8%	
Closed Sales		389	338	- 13.1%	5,388	4,715	4,715	- 12.5%	
Days on Market		35	44	+ 25.7%	30	42	42	+ 40.0%	
Median Sales Price		\$250,250	\$270,000	+ 7.9%	\$260,000	\$274,900	\$274,900	+ 5.7%	
Avg. Sales Price		\$280,120	\$297,711	+ 6.3%	\$280,908	\$293,763	\$293,763	+ 4.6%	
Pct. of List Price Received		98.4%	98.1%	- 0.3%	98.6%	98.1%	98.1%	- 0.5%	
Affordability Index		143	135	- 5.6%	137	133	133	- 2.9%	
Homes for Sale		1,145	1,453	+ 26.9%	--	--	--	--	
Months Supply		2.4	3.4	+ 41.7%	--	--	--	--	

Single Family - New Construction Market Overview

Key metrics for Single Family - New Construction Properties Only for the report month and for year-to-date (YTD) starting from the first of the year.



Key Metrics	Historical Sparklines	11-2024		11-2025	Percent Change	YTD 2024		YTD 2025	Percent Change
		11-2024	11-2025	11-2025		YTD 2024	YTD 2025	YTD 2025	
New Listings		157	158	+ 0.6%	2,293	2,271	- 1.0%		
Pending Sales		125	132	+ 5.6%	1,597	1,740	+ 9.0%		
Closed Sales		120	130	+ 8.3%	1,541	1,731	+ 12.3%		
Days on Market		100	103	+ 3.0%	92	102	+ 10.9%		
Median Sales Price		\$345,550	\$344,000	- 0.4%	\$339,950	\$347,965	+ 2.4%		
Avg. Sales Price		\$360,636	\$361,152	+ 0.1%	\$360,254	\$363,346	+ 0.9%		
Pct. of List Price Received		99.9%	100.1%	+ 0.2%	99.9%	100.0%	+ 0.1%		
Affordability Index		79	83	+ 5.1%	80	82	+ 2.5%		
Homes for Sale		845	736	- 12.9%	--	--	--		
Months Supply		6.2	4.7	- 24.2%	--	--	--		

Townhouse/Condo Market Overview

Key metrics for **Townhouse/Condo Properties Only** for the report month and for year-to-date (YTD) starting from the first of the year.



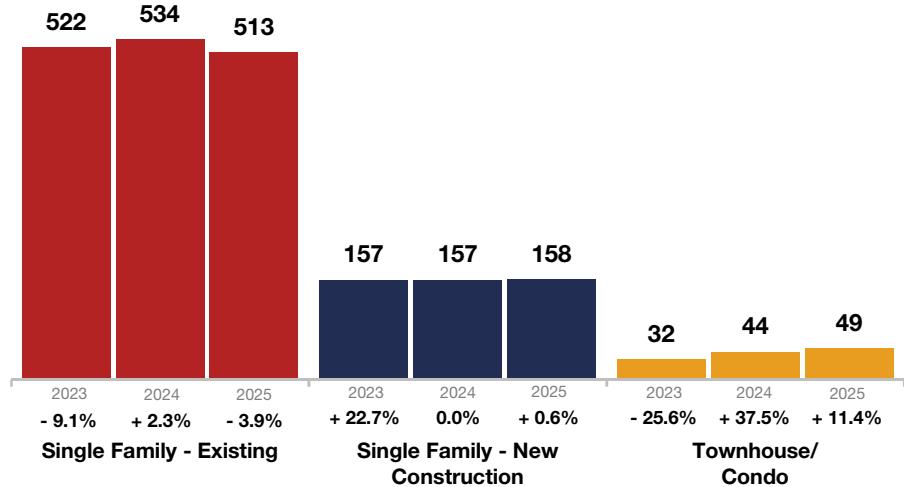
Key Metrics	Historical Sparklines	11-2024		11-2025	Percent Change	YTD 2024		YTD 2025	Percent Change
		11-2024	11-2025	11-2025		YTD 2024	YTD 2025	YTD 2025	
New Listings		44	49	+ 11.4%	537	580	+ 8.0%		
Pending Sales		25	39	+ 56.0%	338	375	+ 10.9%		
Closed Sales		21	26	+ 23.8%	339	338	- 0.3%		
Days on Market		62	46	- 25.8%	42	62	+ 47.6%		
Median Sales Price		\$180,000	\$253,000	+ 40.6%	\$176,000	\$179,000	+ 1.7%		
Avg. Sales Price		\$190,441	\$230,377	+ 21.0%	\$206,921	\$196,562	- 5.0%		
Pct. of List Price Received		97.1%	97.0%	- 0.1%	97.7%	97.2%	- 0.5%		
Affordability Index		210	157	- 25.2%	215	222	+ 3.3%		
Homes for Sale		154	167	+ 8.4%	--	--	--		
Months Supply		5.1	5.5	+ 7.8%	--	--	--		

New Listings

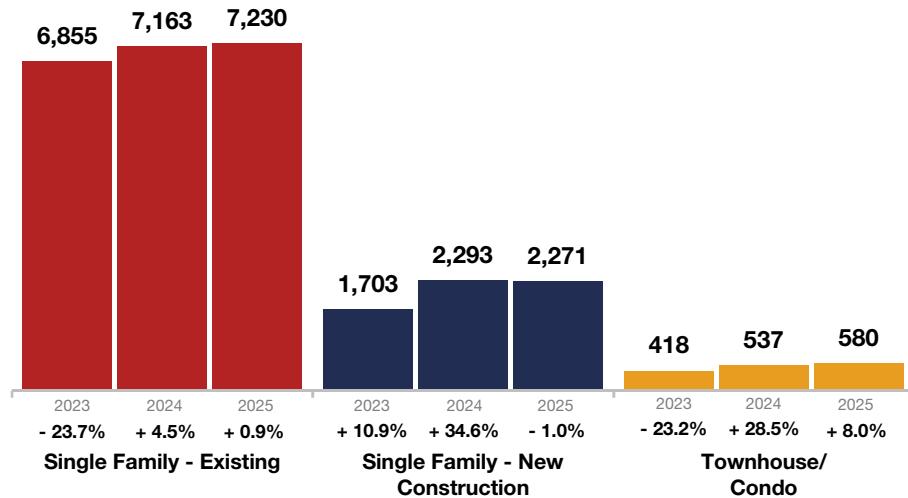
A count of the properties that have been newly listed on the market in a given month.



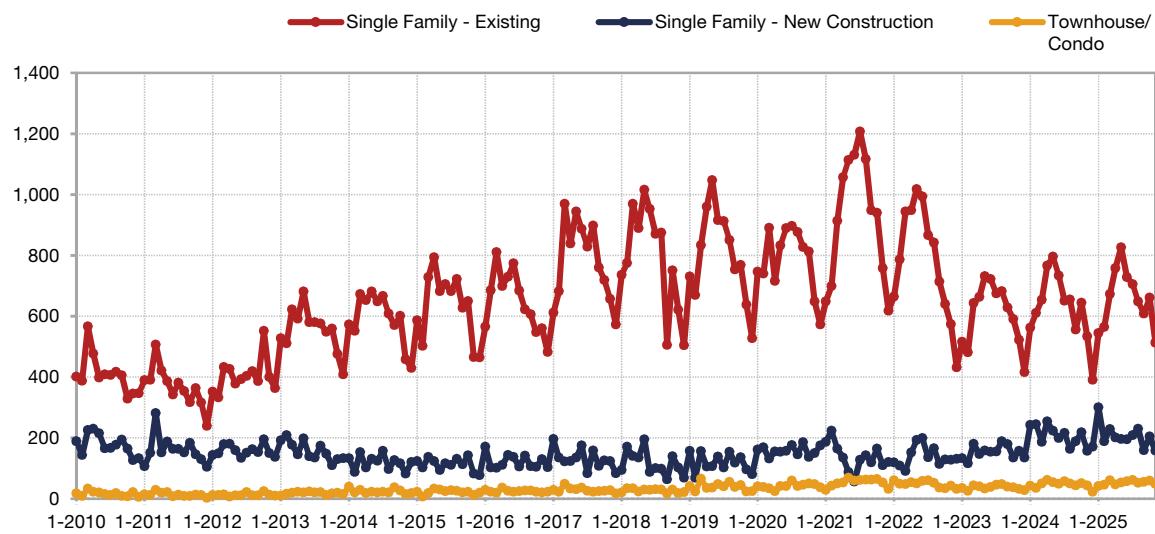
November



Year to Date



Historical New Listings by Month



Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

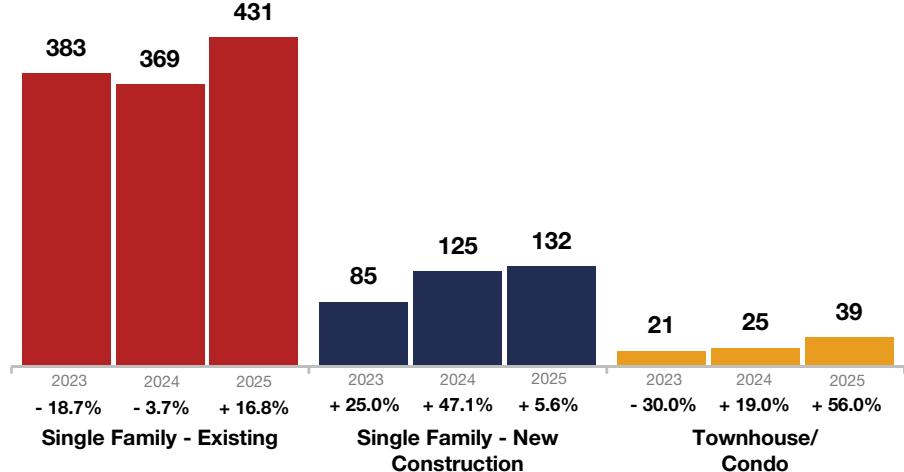
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
December 2024	391	171	23
January 2025	544	300	41
February 2025	564	189	46
March 2025	673	229	60
April 2025	758	201	47
May 2025	826	196	53
June 2025	728	195	57
July 2025	705	209	61
August 2025	649	230	52
September 2025	609	159	55
October 2025	661	205	59
November 2025	513	158	49
12-Month Avg.	635	204	50

Pending Sales

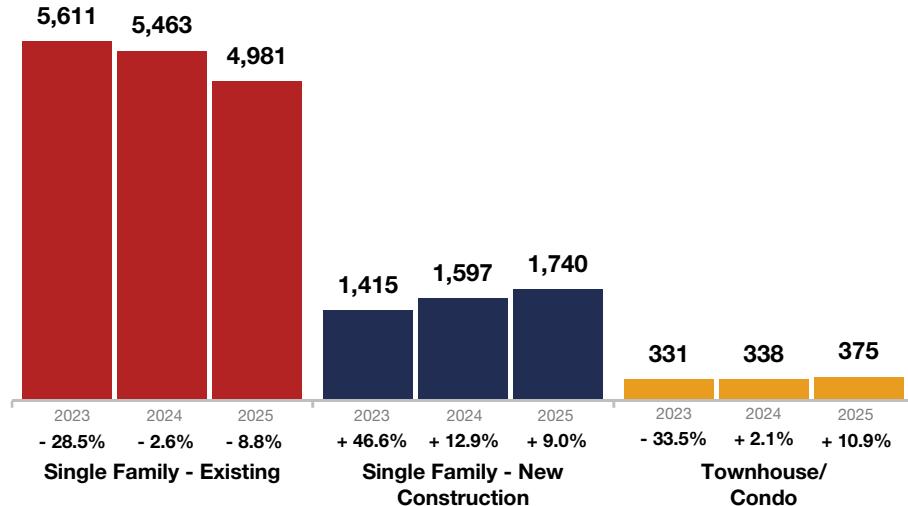
A count of the properties on which offers have been accepted in a given month.



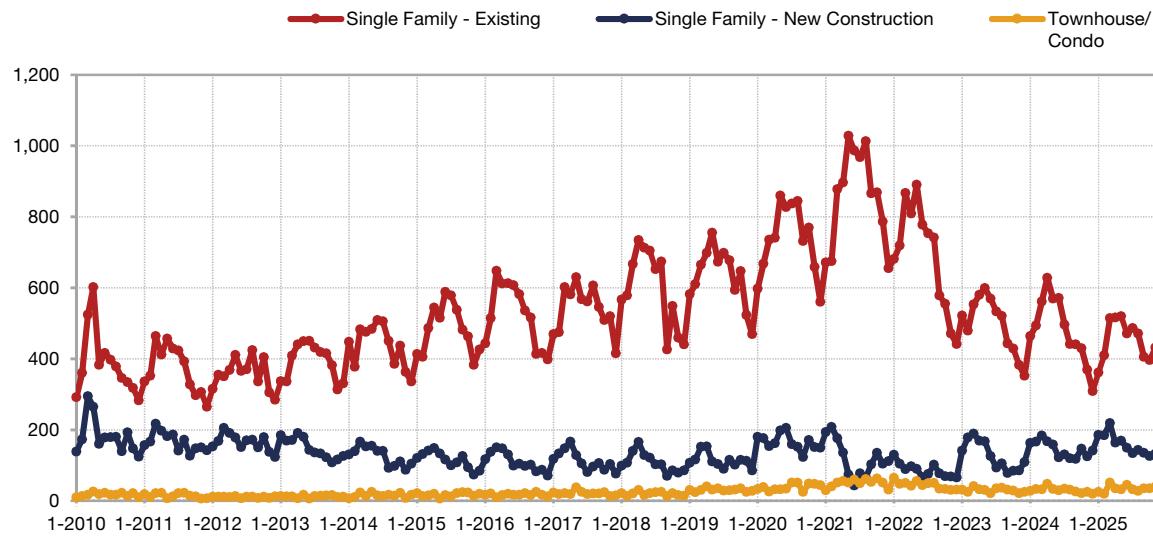
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Historical Pending Sales by Month



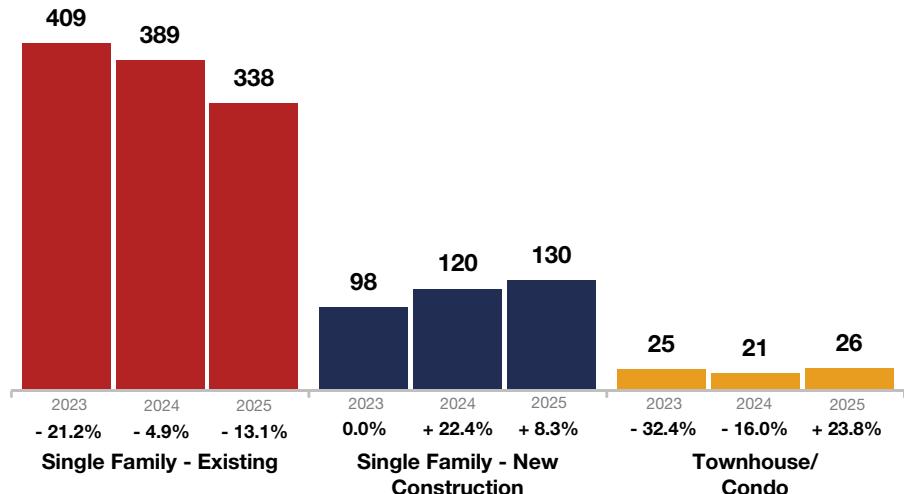
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
December 2024	309	141	19
January 2025	361	185	25
February 2025	410	184	19
March 2025	514	219	51
April 2025	516	164	35
May 2025	520	169	32
June 2025	471	149	45
July 2025	486	134	32
August 2025	471	143	27
September 2025	405	135	35
October 2025	396	126	35
November 2025	431	132	39
12-Month Avg.	441	157	33

Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

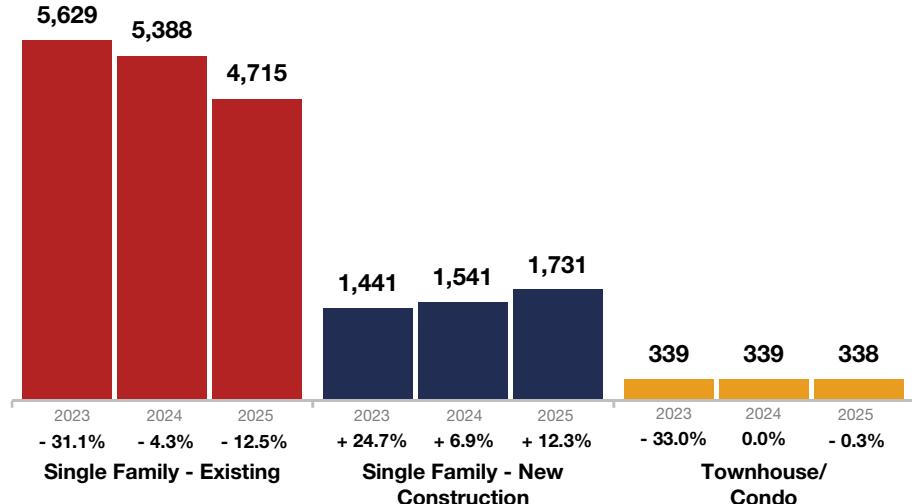
Closed Sales

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

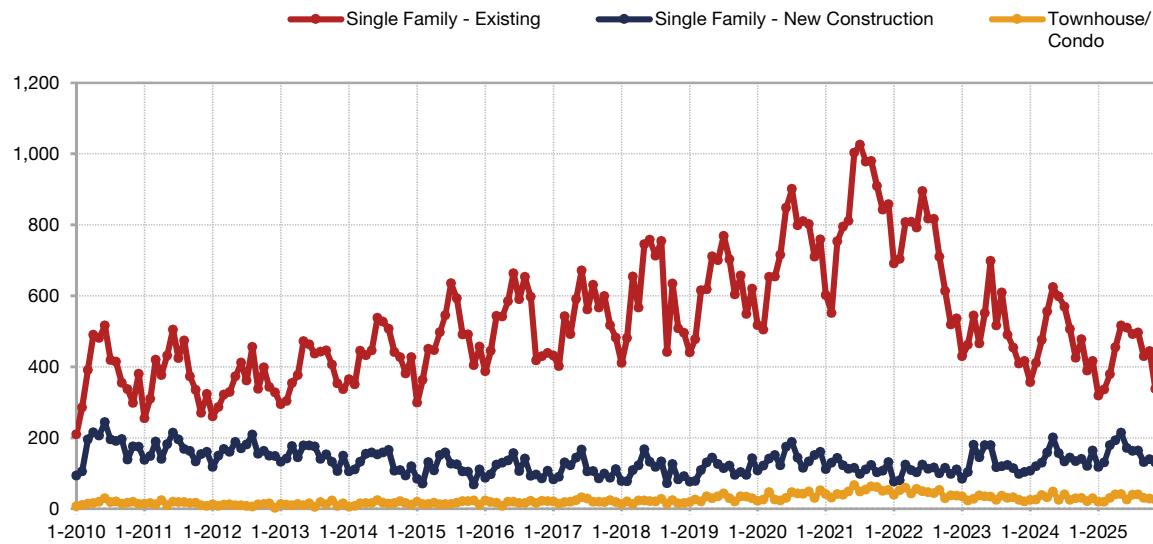
November



Year to Date



Historical Closed Sales by Month



Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

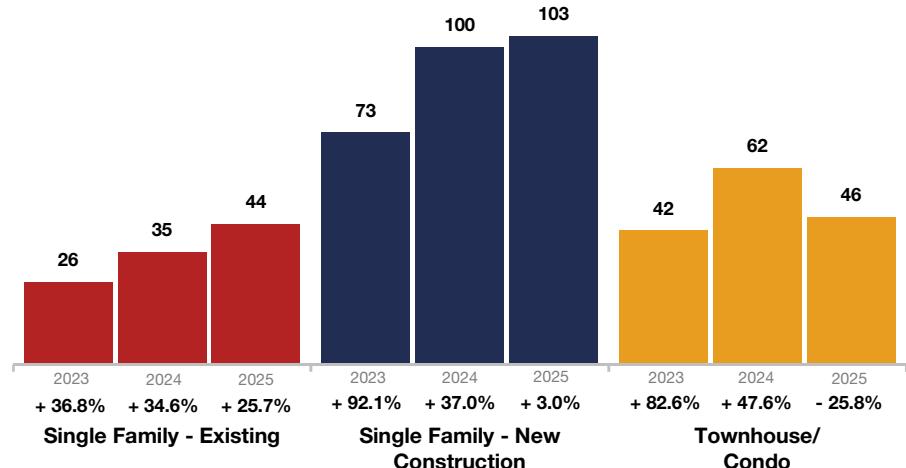
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
December 2024	416	164	29
January 2025	319	118	19
February 2025	336	130	19
March 2025	379	179	30
April 2025	455	192	40
May 2025	516	214	41
June 2025	510	171	26
July 2025	492	163	39
August 2025	496	164	40
September 2025	430	131	30
October 2025	444	139	28
November 2025	338	130	26
12-Month Avg.	428	158	31

Days on Market Until Sale

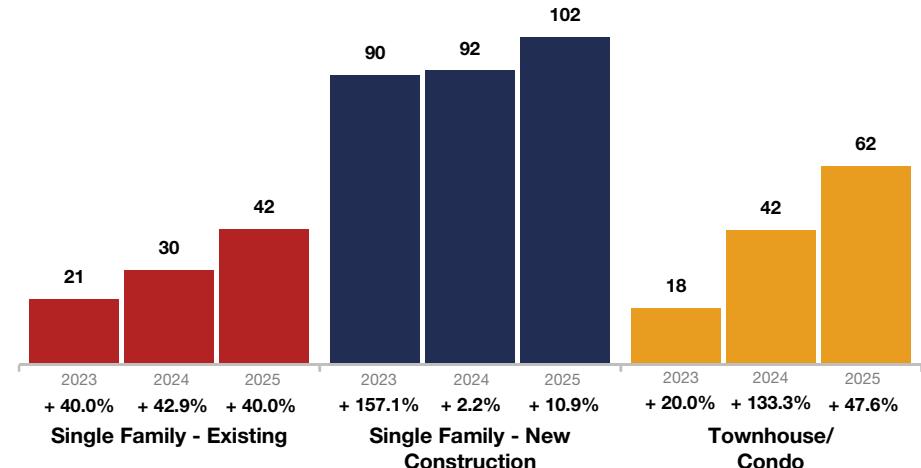
Average number of days between when a property is listed and when an offer is accepted in a given month.



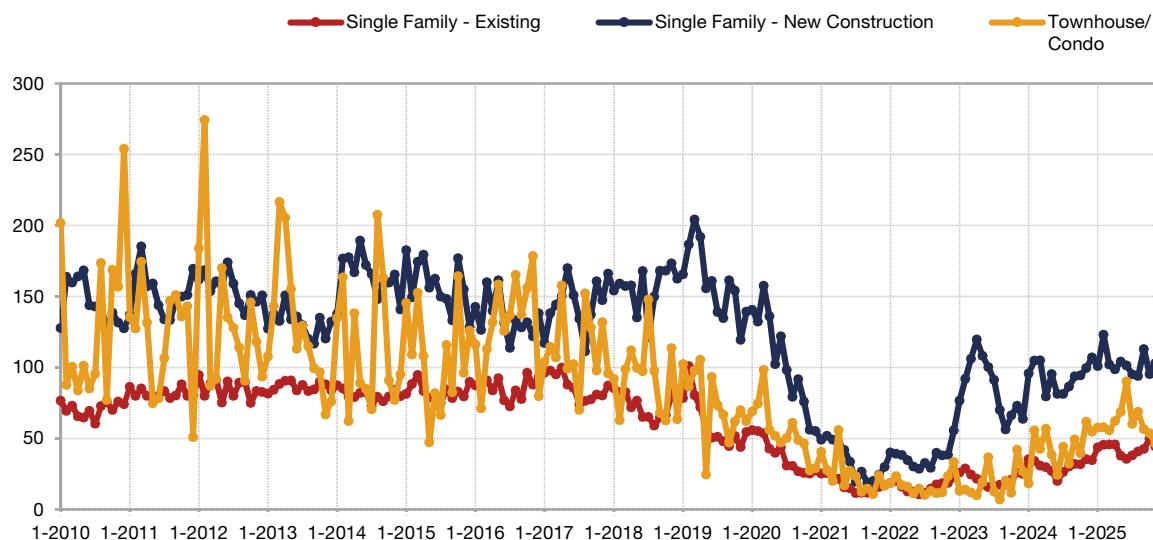
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Year to Date



Historical Days on Market Until Sale by Month



Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
December 2024	35	107	55
January 2025	44	101	58
February 2025	45	123	58
March 2025	46	102	56
April 2025	46	99	62
May 2025	38	104	69
June 2025	36	101	90
July 2025	38	95	60
August 2025	41	94	69
September 2025	43	113	57
October 2025	50	95	54
November 2025	44	103	46
12-Month Avg.*	42	103	62

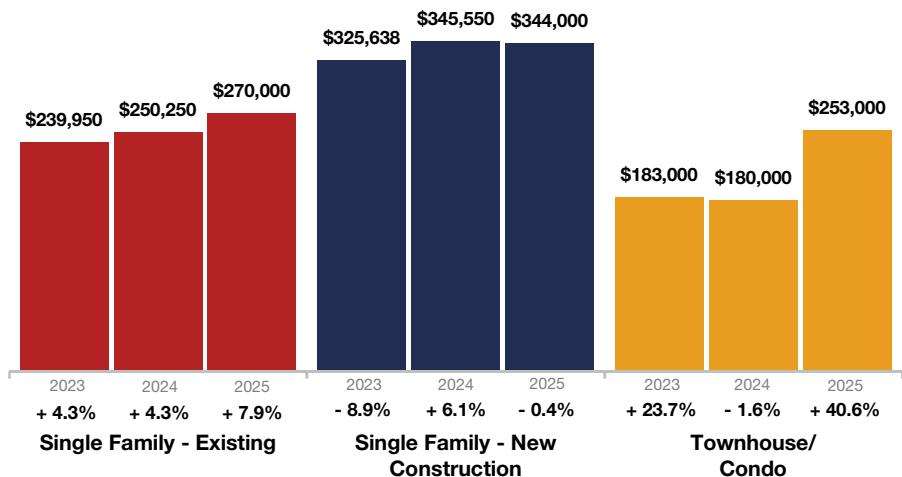
* Days on Market for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

Median Sales Price

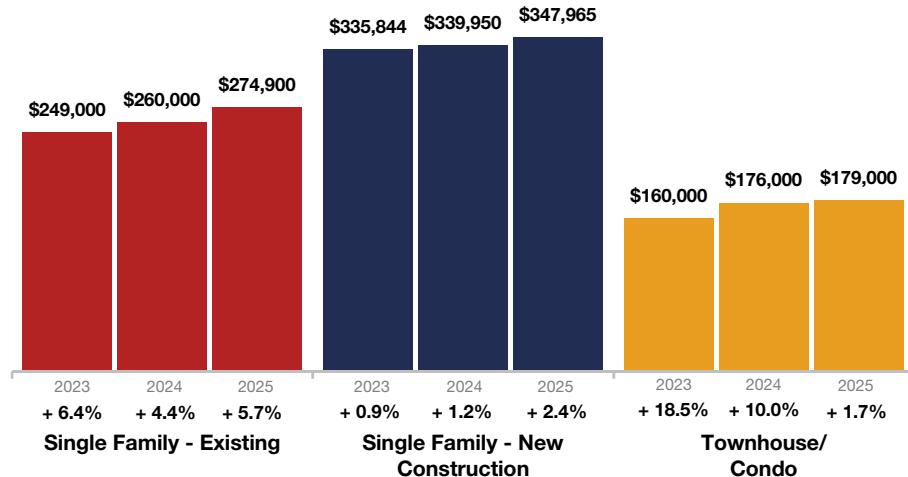
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



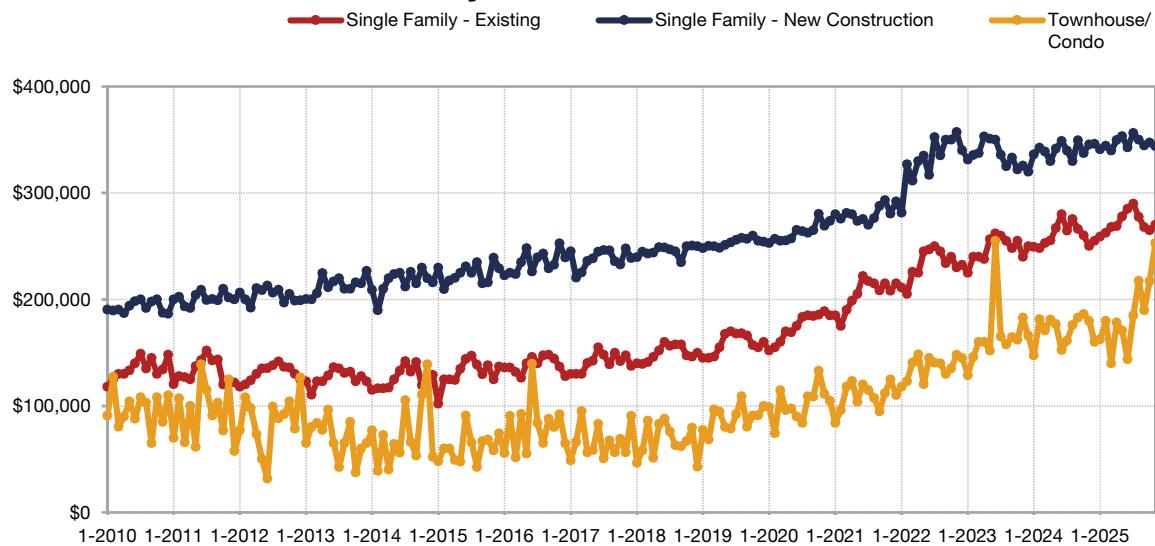
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Year to Date



Historical Median Sales Price by Month



Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
December 2024	\$255,000	\$346,025	\$160,000
January 2025	\$259,000	\$341,000	\$162,500
February 2025	\$262,500	\$344,270	\$180,000
March 2025	\$268,000	\$339,900	\$140,000
April 2025	\$268,850	\$349,748	\$178,500
May 2025	\$278,000	\$353,400	\$171,000
June 2025	\$285,000	\$342,900	\$143,750
July 2025	\$289,900	\$356,400	\$185,000
August 2025	\$277,650	\$349,950	\$217,500
September 2025	\$268,000	\$344,525	\$189,750
October 2025	\$264,900	\$347,400	\$217,000
November 2025	\$270,000	\$344,000	\$253,000
12-Month Med.*	\$271,000	\$347,900	\$177,000

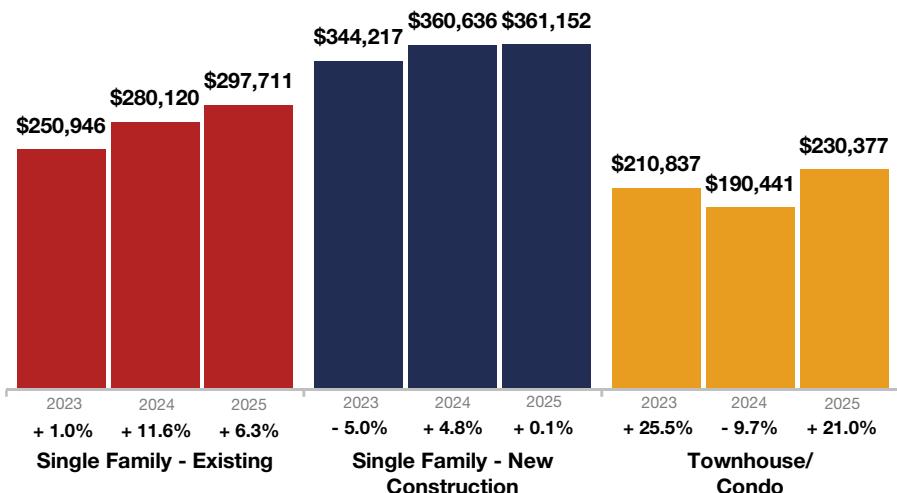
* Median Sales Price for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

Average Sales Price

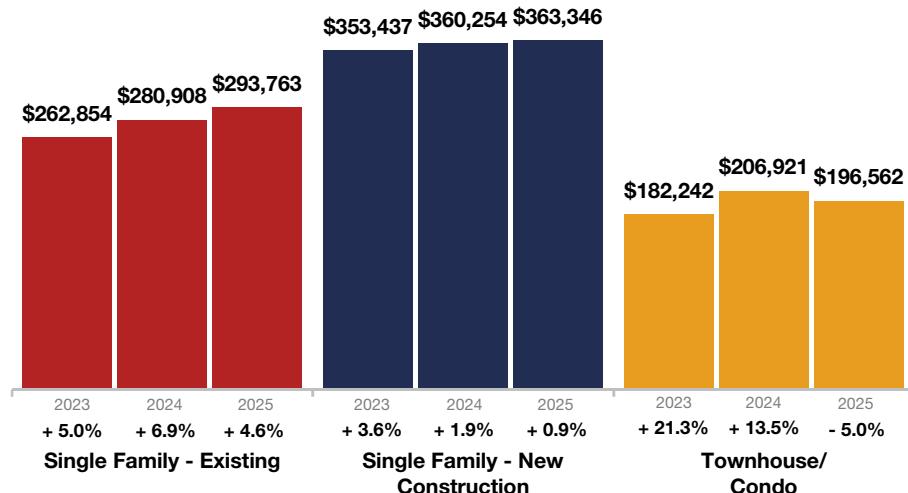
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



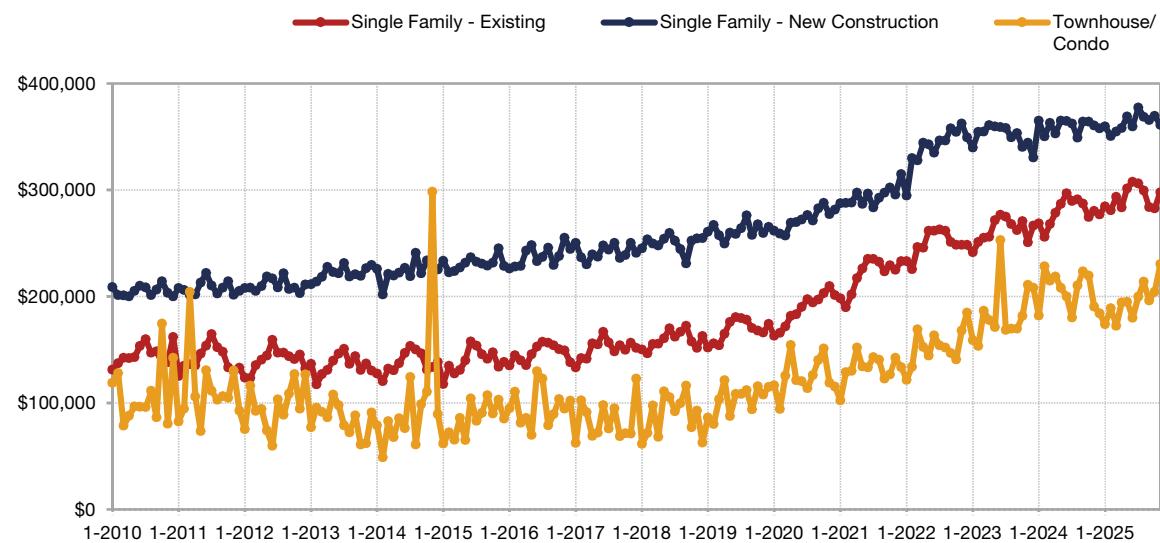
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Year to Date



Historical Average Sales Price by Month



Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
December 2024	\$277,077	\$357,818	\$184,138
January 2025	\$284,590	\$359,678	\$173,797
February 2025	\$280,973	\$350,626	\$189,011
March 2025	\$293,408	\$354,834	\$172,477
April 2025	\$283,546	\$358,171	\$194,340
May 2025	\$301,416	\$369,055	\$194,866
June 2025	\$307,635	\$359,713	\$179,935
July 2025	\$306,190	\$377,307	\$199,708
August 2025	\$299,443	\$368,625	\$213,805
September 2025	\$283,826	\$365,664	\$196,052
October 2025	\$282,552	\$369,490	\$204,175
November 2025	\$297,711	\$361,152	\$230,377
12-Month Avg.*	\$292,407	\$362,866	\$195,581

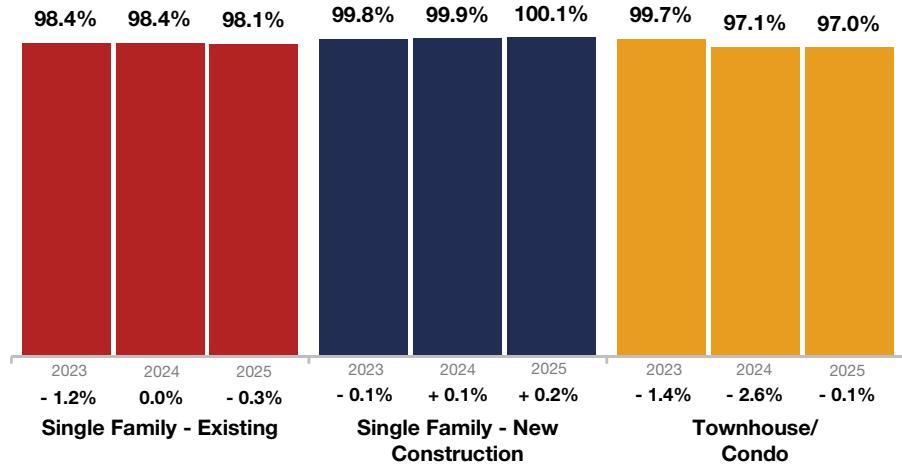
* Avg. Sales Price for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

Percent of List Price Received

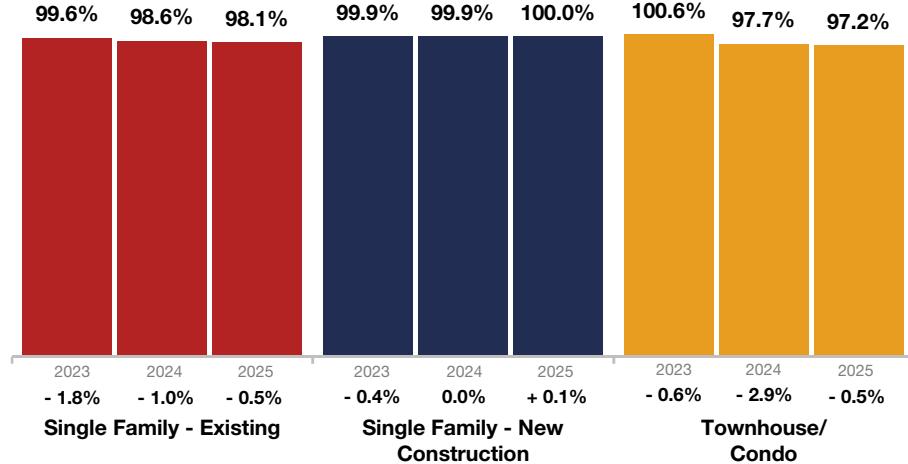
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



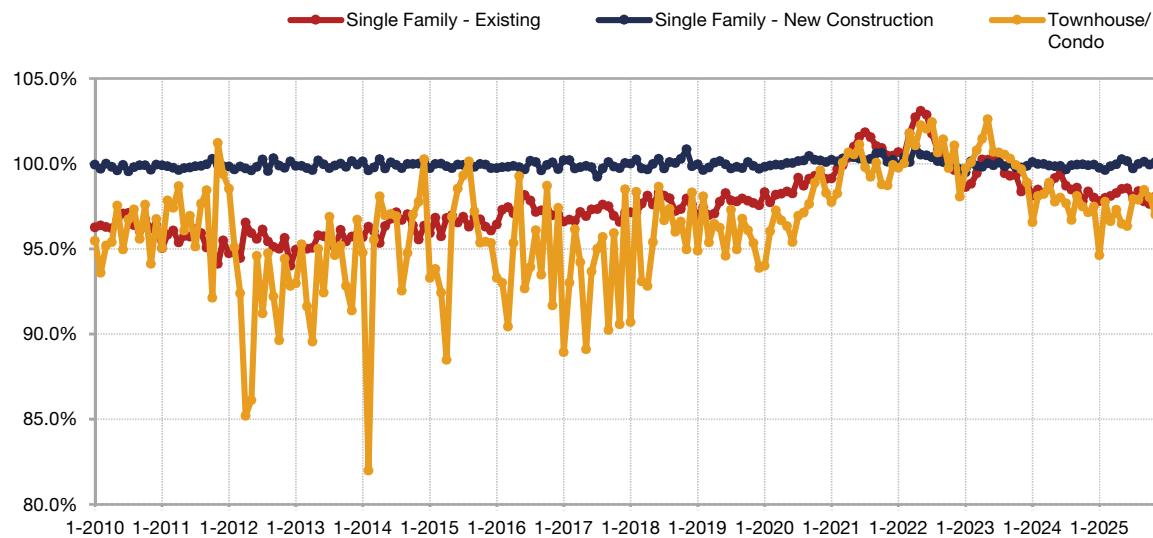
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Year to Date



Historical Percent of List Price Received by Month



Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

Data as of December 10, 2025. All data from Longleaf Pine REALTORS® | Report © 2025 ShowingTime Plus, LLC. | 11

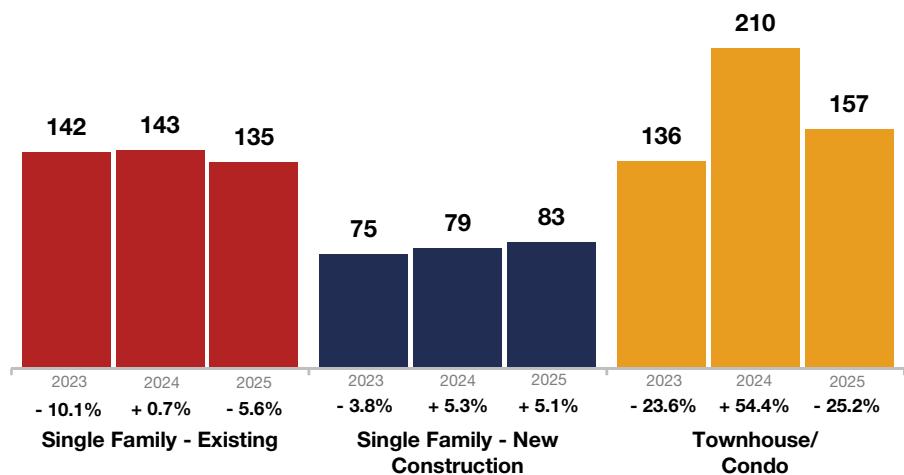
* Pct. of List Price Received for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

Housing Affordability Index

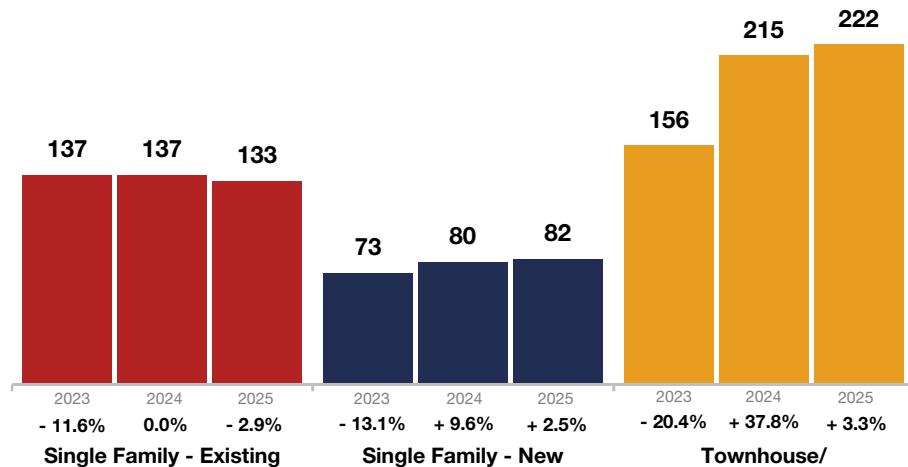
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



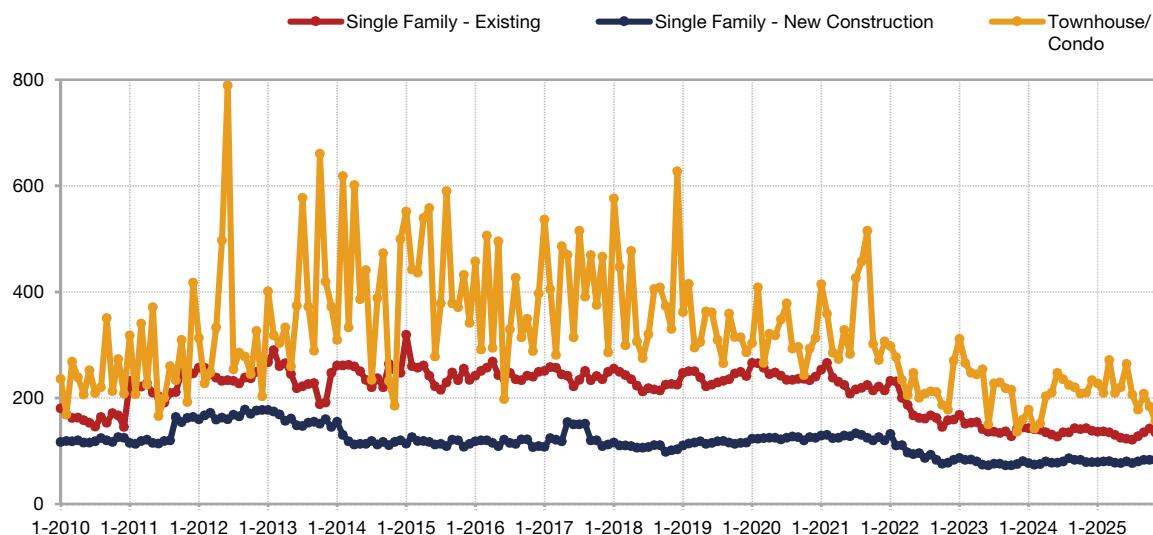
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Year to Date



Historical Housing Affordability Index by Month



	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
December 2024	138	79	233
January 2025	136	79	227
February 2025	137	80	209
March 2025	135	81	271
April 2025	130	78	209
May 2025	125	77	220
June 2025	123	80	264
July 2025	121	77	206
August 2025	128	80	178
September 2025	135	83	208
October 2025	142	83	184
November 2025	135	83	157
12-Month Avg.*	132	80	214

* Affordability Index for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

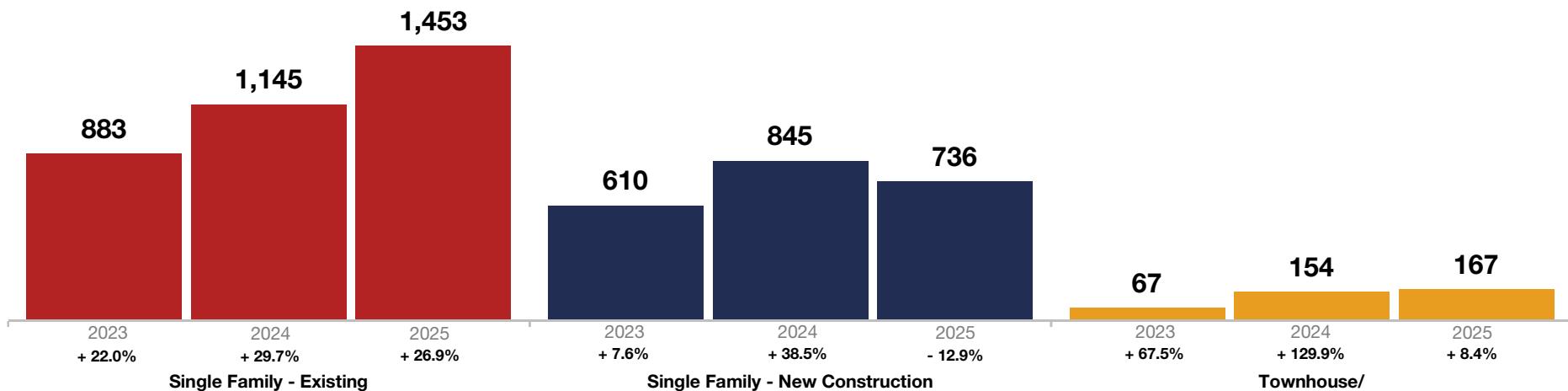
Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

Inventory of Homes for Sale

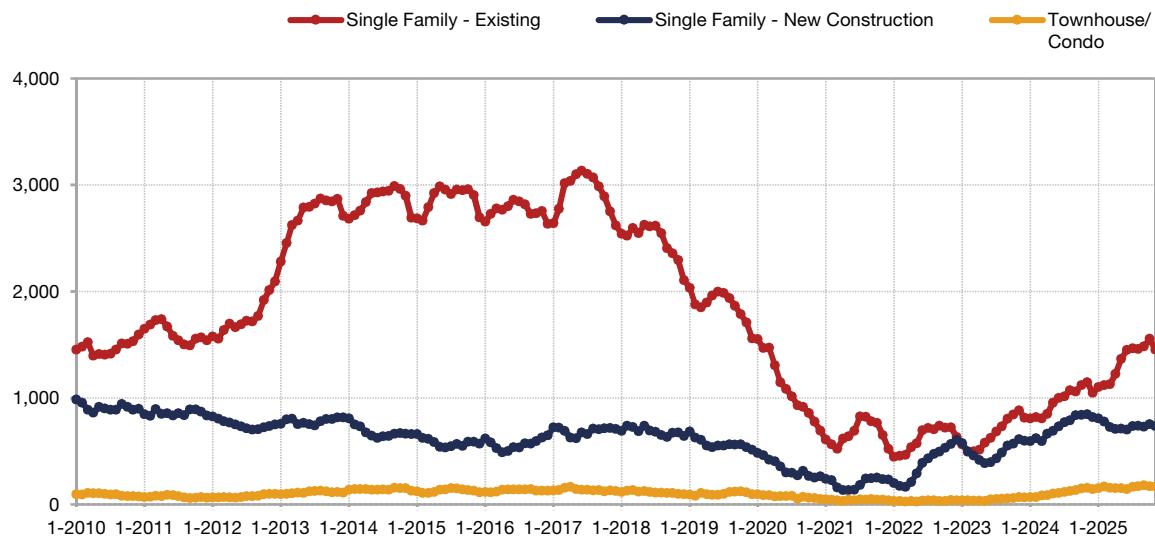
The number of properties available for sale in active status at the end of a given month.



November



Historical Inventory of Homes for Sale by Month



Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

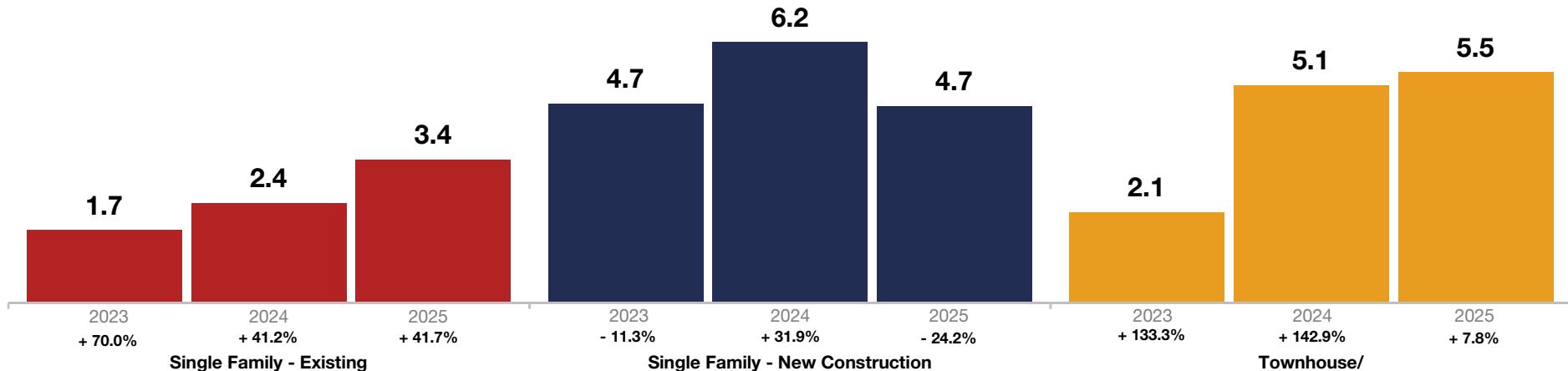
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
December 2024	1,047	818	144
January 2025	1,102	806	152
February 2025	1,118	778	167
March 2025	1,127	727	154
April 2025	1,225	708	153
May 2025	1,365	711	152
June 2025	1,449	701	144
July 2025	1,465	735	163
August 2025	1,460	738	170
September 2025	1,483	730	178
October 2025	1,556	754	170
November 2025	1,453	736	167
12-Month Avg.	1,321	745	160

Months Supply of Inventory

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



November



Historical Months Supply of Inventory by Month



Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
December 2024	2.2	5.8	4.7
January 2025	2.3	5.6	5.0
February 2025	2.4	5.4	5.6
March 2025	2.4	4.9	5.3
April 2025	2.7	4.7	5.2
May 2025	3.0	4.7	5.2
June 2025	3.3	4.6	5.0
July 2025	3.4	4.7	5.6
August 2025	3.4	4.7	5.6
September 2025	3.4	4.6	5.9
October 2025	3.6	4.8	5.6
November 2025	3.4	4.7	5.5
12-Month Avg.*	2.9	4.9	5.4

* Months Supply for all properties from December 2024 through November 2025. This is not the average of the individual figures above.

All Residential Properties Overview

Key metrics for single-family properties, townhouses, and condominiums combined, for all construction statuses, for the report month and for year-to-date (YTD) starting from the first of the year.



Key Metrics	Historical Sparklines	11-2024		11-2025	Percent Change	YTD 2024		YTD 2025	Percent Change
		11-2024	11-2025	11-2025		YTD 2024	YTD 2025	YTD 2025	
New Listings		735	720	- 2.0%	9,993	10,081	10,081	+ 0.9%	
Pending Sales		519	602	+ 16.0%	7,398	7,096	7,096	- 4.1%	
Closed Sales		530	494	- 6.8%	7,268	6,784	6,784	- 6.7%	
Days on Market		51	60	+ 17.6%	43	59	59	+ 37.2%	
Median Sales Price		\$276,100	\$299,706	+ 8.5%	\$282,900	\$297,950	297,950	+ 5.3%	
Avg. Sales Price		\$294,824	\$310,786	+ 5.4%	\$294,338	\$306,664	306,664	+ 4.2%	
Pct. of List Price Received		98.7%	98.5%	- 0.2%	98.8%	98.6%	98.6%	- 0.2%	
Affordability Index		129	122	- 5.4%	126	122	122	- 3.2%	
Homes for Sale		2,144	2,356	+ 9.9%	--	--	--	--	
Months Supply		3.3	3.8	+ 15.2%	--	--	--	--	