

Monthly Indicators



September 2026

U.S. existing-home sales fell 2.0% from the previous month and 1.2% from a year earlier to a seasonally adjusted annual rate of 3.98 million, the first reading below 4 million since June 2025, according to the National Association of REALTORS® (NAR). Sales held steady in the West and declined in the Northeast, Midwest, and South. Compared with a year earlier, sales were unchanged in the South and declined in the Northeast, Midwest, and West.

- Single Family - Existing Homes Closed Sales were down 6.6 percent to 409.
- Single Family - New Construction Closed Sales were down 12.2 percent to 115.
- Townhouse/Condo Closed Sales were down 40.6 percent to 19.
- Single Family - Existing Homes Median Sales Price increased 5.8 percent to \$280,500.
- Single Family - New Construction Median Sales Price increased 4.6 percent to \$359,896.
- Townhouse/Condo Median Sales Price decreased 14.9 percent to \$163,000.

Heading into September, there were 1.62 million homes listed for sale, up 3.2% from the previous month and 5.9% from a year earlier, the first time inventory has exceeded 1.6 million units since November 2019, NAR reported. That represents a 4.9-month supply at the current sales pace, up from 4.6 months a month earlier and the highest level in over ten years, according to NAR Chief Economist Lawrence Yun. The median existing-home sales price rose 1.6% year-over-year to \$429,100, marking 38 consecutive months of annual gains, and year-to-date sales are up 1.6%. The Federal Reserve raised its benchmark rate by a quarter point on September 16 to a range of 3.75% to 4%, its first increase since July 2023, and the 30-year fixed-rate mortgage moved above 7% in late September, up from an August average of 6.67%, according to Freddie Mac.

Quick Facts

- 9.7% **+ 3.6%** **+ 11.6%**

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
--	--	--

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.

Single Family - Existing Market Overview	2
Single Family - New Construction Market Overview	3
Townhouse/Condo Market Overview	4
New Listings	5
Pending Sales	6
Closed Sales	7
Days on Market Until Sale	8
Median Sales Price	9
Average Sales Price	10
Percent of List Price Received	11
Housing Affordability Index	12
Inventory of Homes for Sale	13
Months Supply of Inventory	14
All Residential Properties Overview	15

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	9-2025	9-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		610	589	- 3.4%	6,054	6,167	+ 1.9%
Pending Sales		402	389	- 3.2%	4,144	4,170	+ 0.6%
Closed Sales		438	409	- 6.6%	3,959	4,012	+ 1.3%
Days on Market		42	50	+ 19.0%	41	50	+ 22.0%
Median Sales Price		\$265,000	\$280,500	+ 5.8%	\$275,000	\$275,000	0.0%
Avg. Sales Price		\$282,500	\$302,520	+ 7.1%	\$294,445	\$297,977	+ 1.2%
Pct. of List Price Received		97.7%	97.6%	- 0.1%	98.2%	98.0%	- 0.2%
Affordability Index		144	131	- 9.0%	139	133	- 4.3%
Homes for Sale		1,493	1,748	+ 17.1%	--	--	--
Months Supply		3.4	4.0	+ 17.6%	--	--	--

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	9-2025	9-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		159	126	- 20.8%	1,908	1,760	- 7.8%
Pending Sales		133	127	- 4.5%	1,474	1,433	- 2.8%
Closed Sales		131	115	- 12.2%	1,465	1,385	- 5.5%
Days on Market		113	117	+ 3.5%	103	106	+ 2.9%
Median Sales Price		\$344,100	\$359,896	+ 4.6%	\$348,749	\$349,999	+ 0.4%
Avg. Sales Price		\$365,452	\$380,992	+ 4.3%	\$362,873	\$369,808	+ 1.9%
Pct. of List Price Received		100.1%	99.6%	- 0.5%	100.0%	99.9%	- 0.1%
Affordability Index		87	79	- 9.2%	86	81	- 5.8%
Homes for Sale		731	772	+ 5.6%	--	--	--
Months Supply		4.6	5.1	+ 10.9%	--	--	--

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.



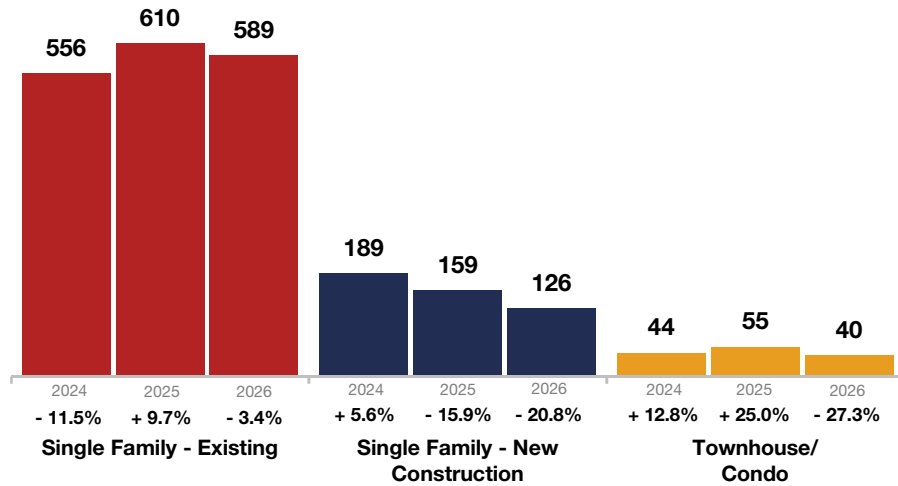
Key Metrics	Historical Sparklines	9-2025	9-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		55	40	- 27.3%	471	446	- 5.3%
Pending Sales		34	25	- 26.5%	299	256	- 14.4%
Closed Sales		32	19	- 40.6%	285	250	- 12.3%
Days on Market		56	90	+ 60.7%	65	76	+ 16.9%
Median Sales Price		\$191,500	\$163,000	- 14.9%	\$173,500	\$206,000	+ 18.7%
Avg. Sales Price		\$197,736	\$185,466	- 6.2%	\$193,026	\$206,653	+ 7.1%
Pct. of List Price Received		98.4%	96.7%	- 1.7%	97.2%	97.2%	0.0%
Affordability Index		218	165	- 24.3%	241	130	- 46.1%
Homes for Sale		179	161	- 10.1%	--	--	--
Months Supply		5.9	5.6	- 5.1%	--	--	--

New Listings

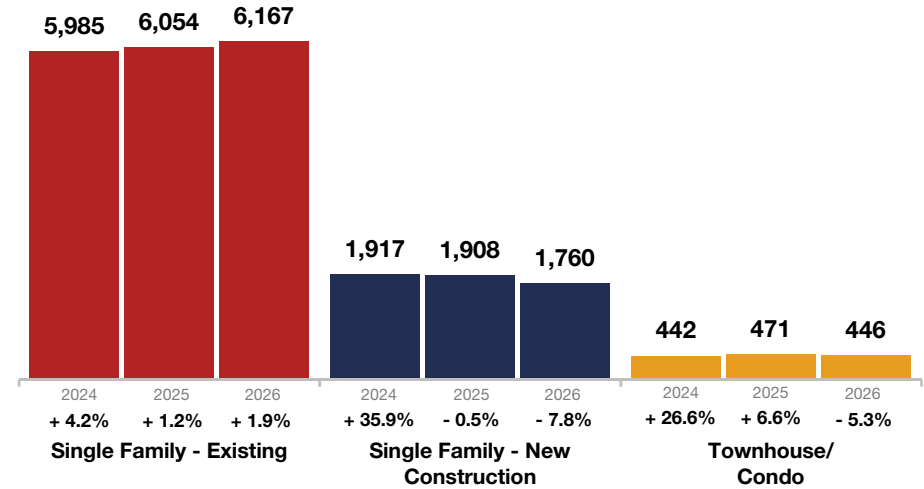
A count of the properties that have been newly listed on the market in a given month.



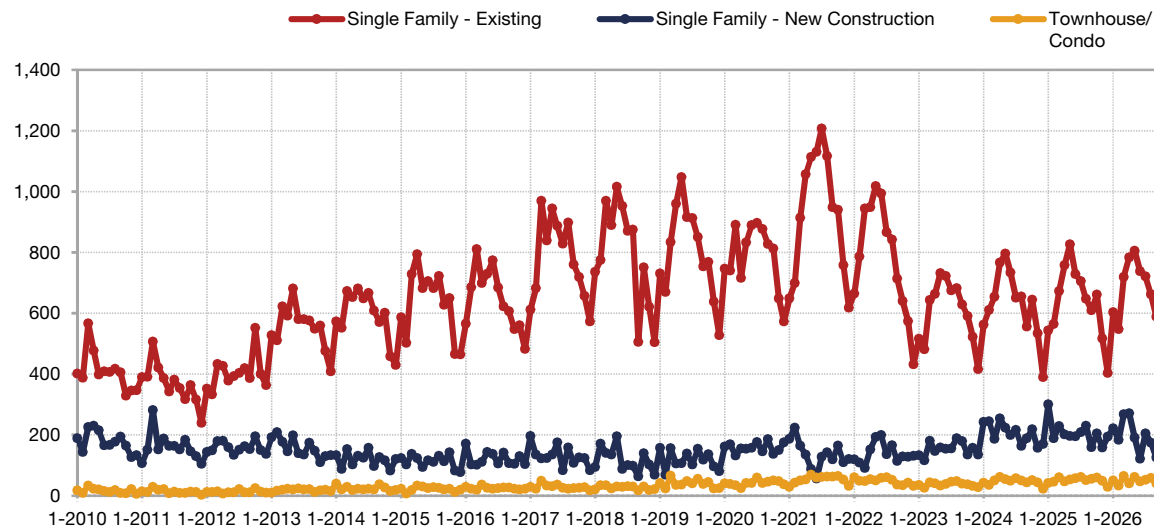
September



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.

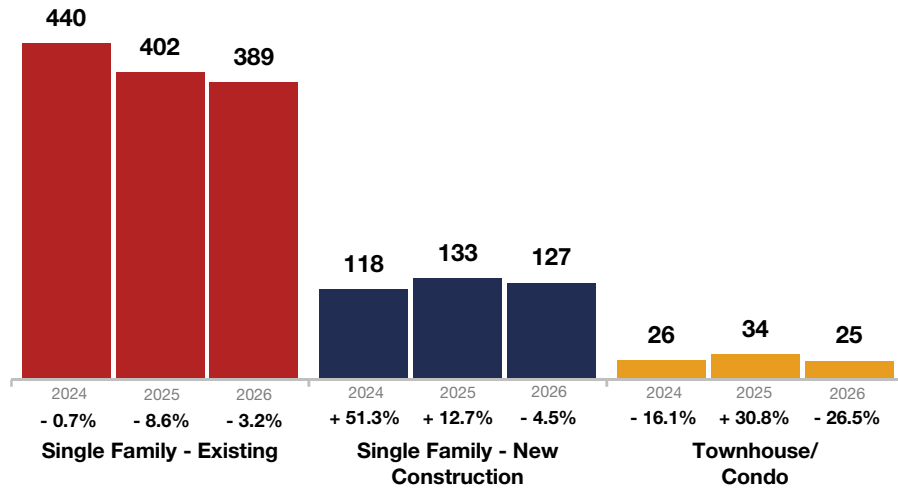
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
October 2025	661	205	59
November 2025	517	158	49
December 2025	403	194	29
January 2026	603	221	50
February 2026	547	183	33
March 2026	719	268	65
April 2026	783	271	40
May 2026	805	191	61
June 2026	738	121	47
July 2026	721	205	52
August 2026	662	174	58
September 2026	589	126	40
12-Month Avg.	646	193	49

Pending Sales

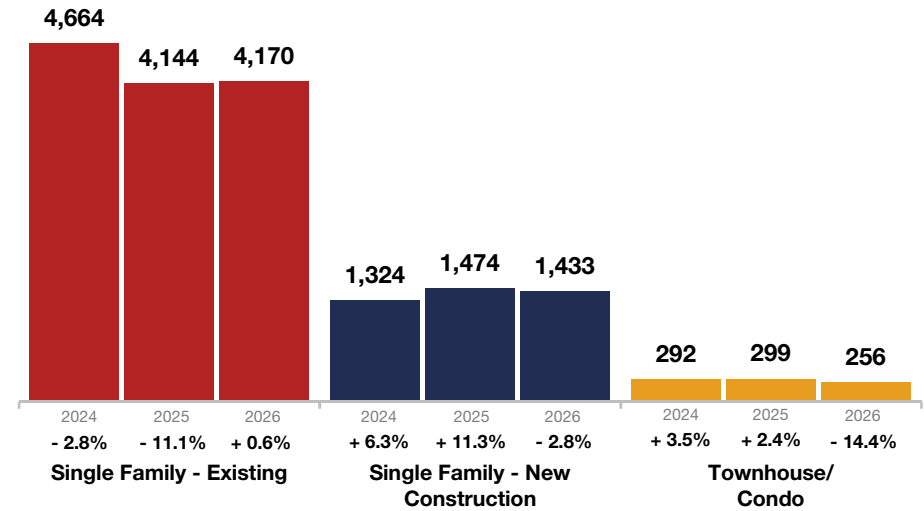
A count of the properties on which offers have been accepted in a given month.



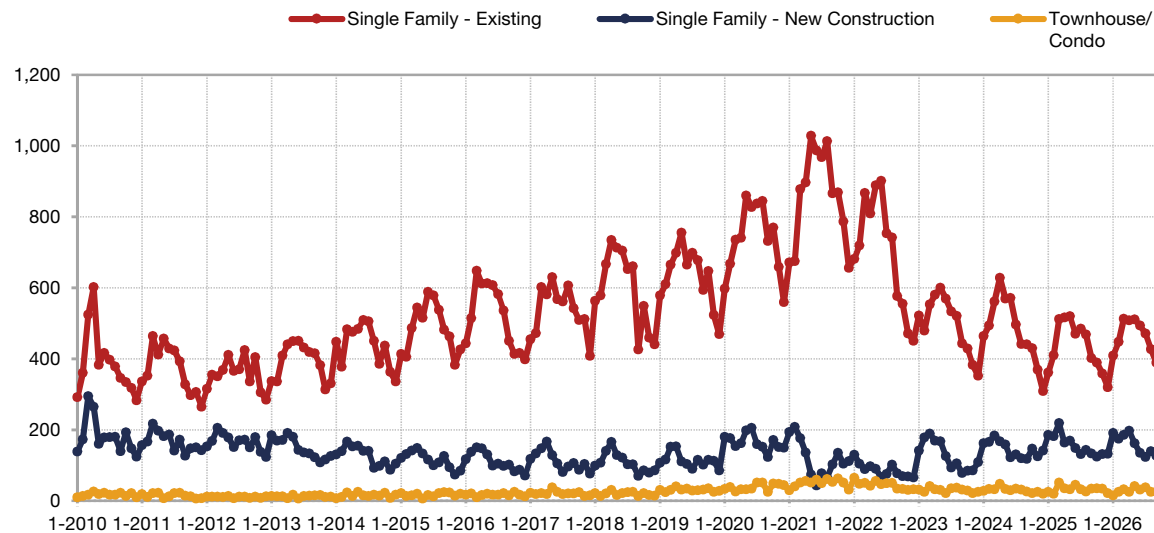
September



Year to Date



Historical Pending 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.

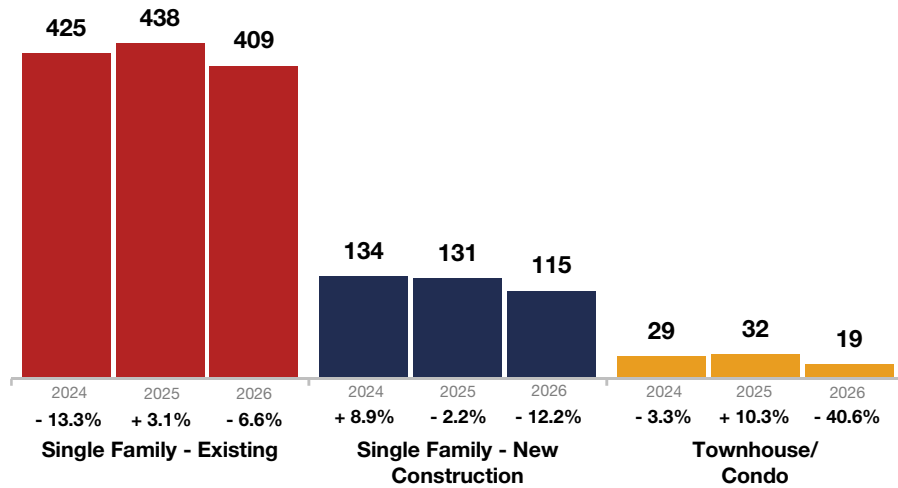
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
October 2025	389	124	35
November 2025	358	131	34
December 2025	320	132	21
January 2026	409	191	15
February 2026	448	174	25
March 2026	513	185	32
April 2026	508	197	25
May 2026	511	162	41
June 2026	494	135	31
July 2026	471	123	37
August 2026	427	139	25
September 2026	389	127	25
12-Month Avg.	436	152	29

Closed Sales

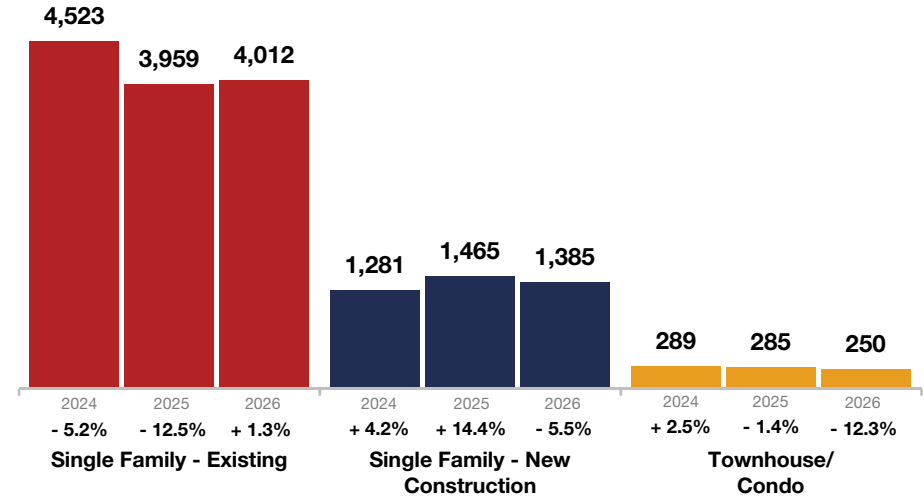
A count of the actual sales that closed in a given month.



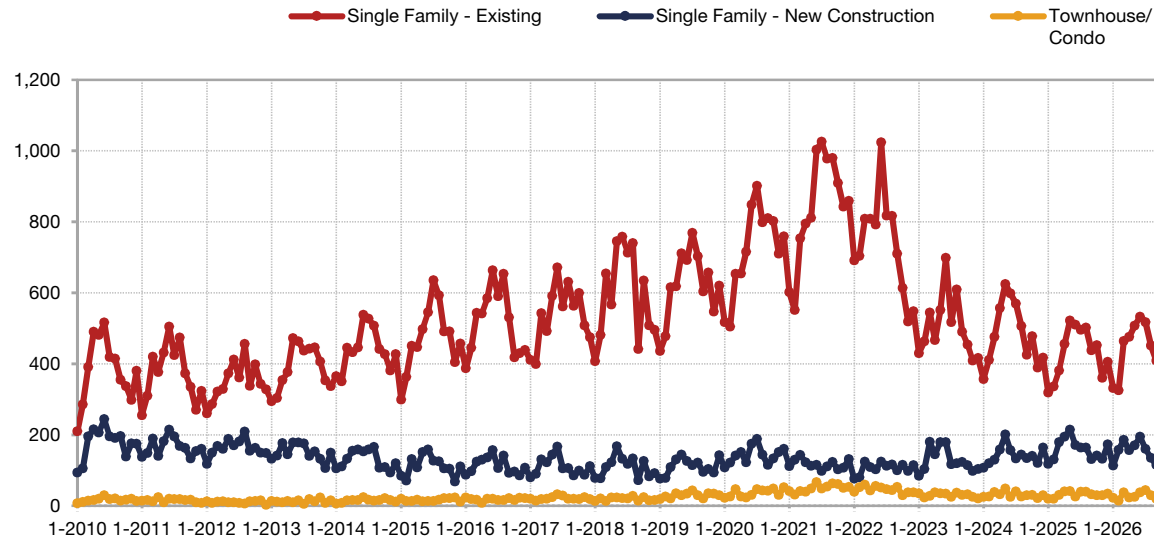
September



Year to Date



Historical Closed Sales by Month



	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
October 2025	452	141	29
November 2025	360	132	29
December 2025	405	173	34
January 2026	331	113	22
February 2026	325	157	14
March 2026	464	185	37
April 2026	476	156	23
May 2026	507	170	25
June 2026	532	194	37
July 2026	517	160	44
August 2026	451	135	29
September 2026	409	115	19
12-Month Avg.	436	153	29

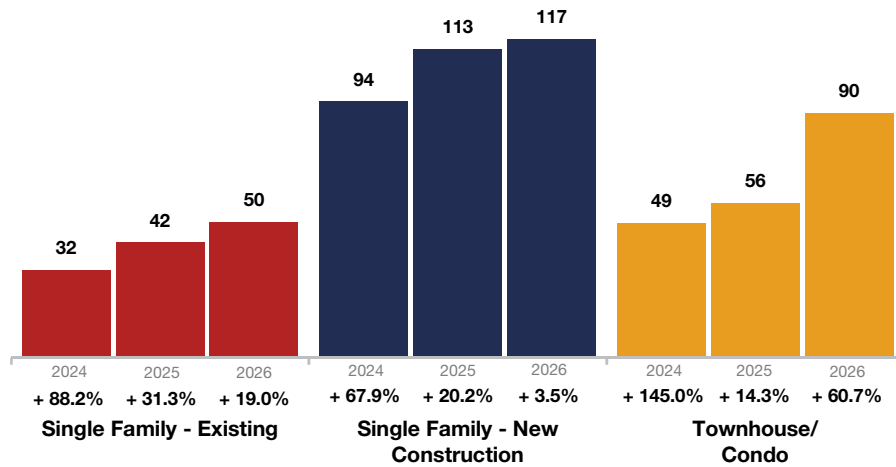
Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

Days on Market Until Sale

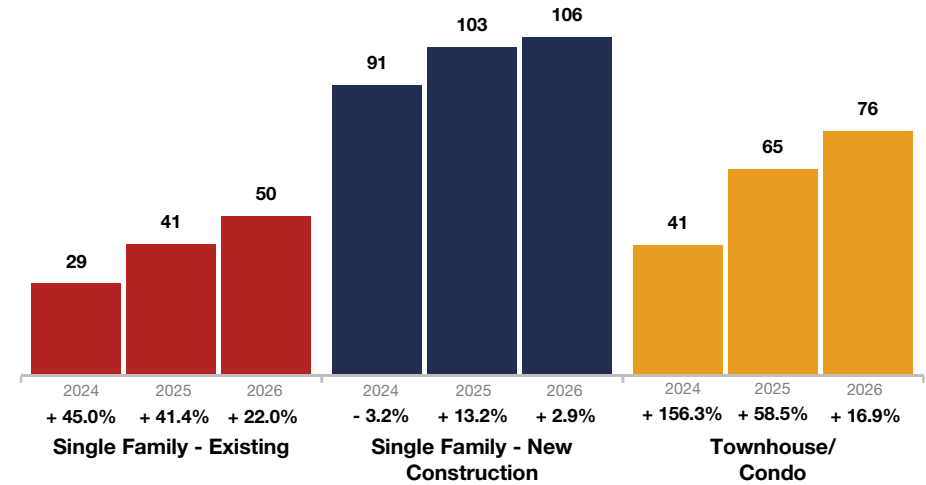
Average number of days between when a property is listed and when an offer is accepted in a given month.



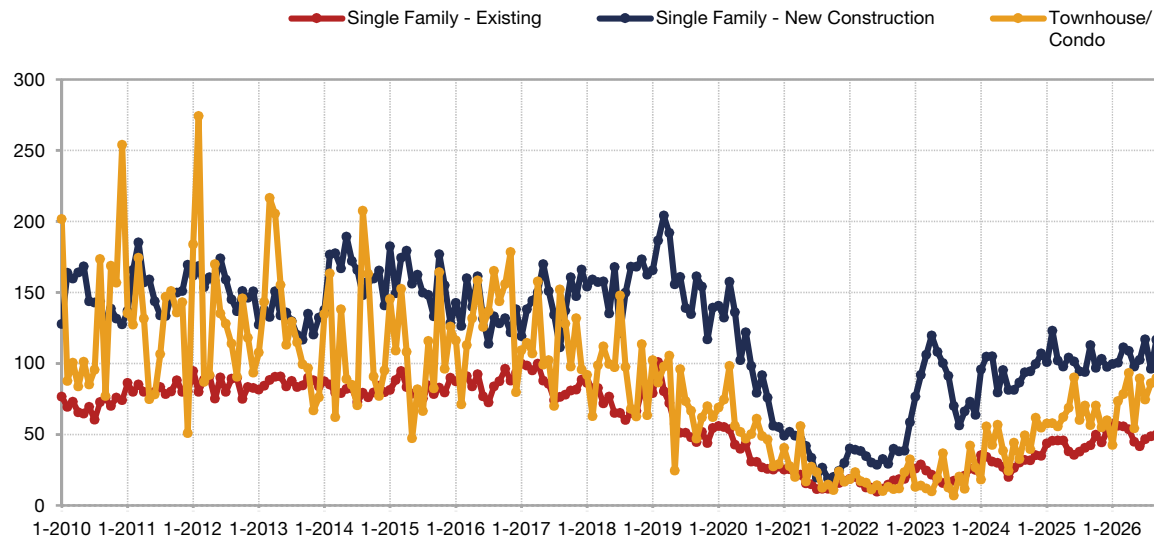
September



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
October 2025	50	97	70
November 2025	44	103	55
December 2025	52	98	60
January 2026	57	100	42
February 2026	56	100	73
March 2026	55	111	78
April 2026	54	109	93
May 2026	45	98	54
June 2026	42	103	89
July 2026	47	117	74
August 2026	49	96	86
September 2026	50	117	90
12-Month Avg.*	50	104	72

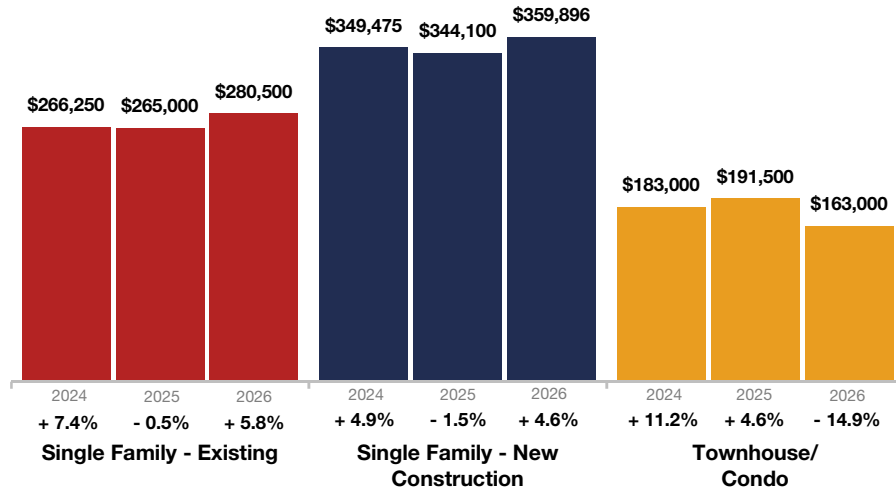
* Days on Market for all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Median Sales Price

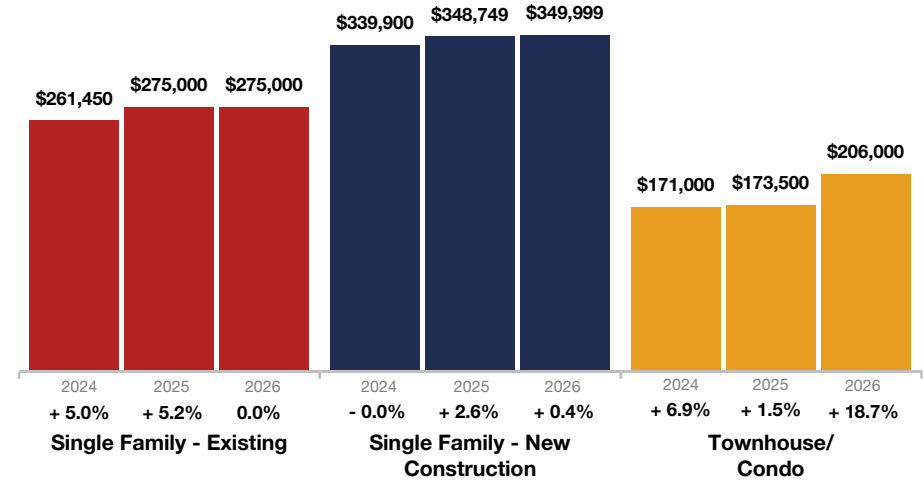
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



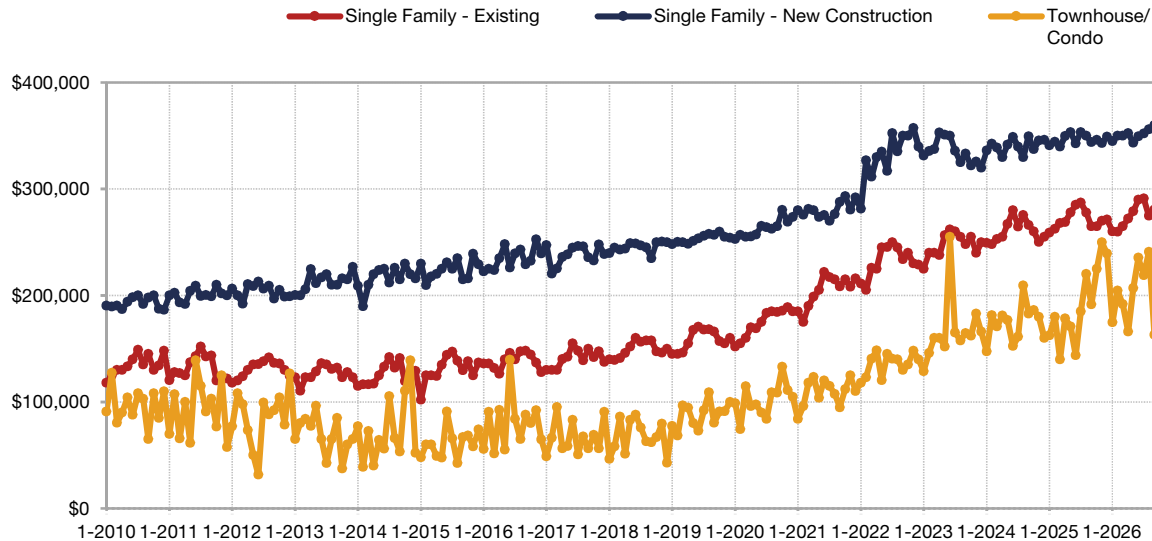
September



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
October 2025	\$264,900	\$346,100	\$225,000
November 2025	\$269,900	\$343,208	\$250,000
December 2025	\$271,250	\$349,100	\$239,250
January 2026	\$260,000	\$344,900	\$174,750
February 2026	\$259,900	\$349,900	\$204,500
March 2026	\$265,000	\$349,999	\$192,000
April 2026	\$272,000	\$352,430	\$165,900
May 2026	\$279,000	\$343,440	\$207,000
June 2026	\$290,000	\$349,348	\$235,500
July 2026	\$291,000	\$352,144	\$219,000
August 2026	\$275,000	\$355,896	\$241,000
September 2026	\$280,500	\$359,896	\$163,000
12-Month Med.*	\$273,204	\$349,697	\$209,742

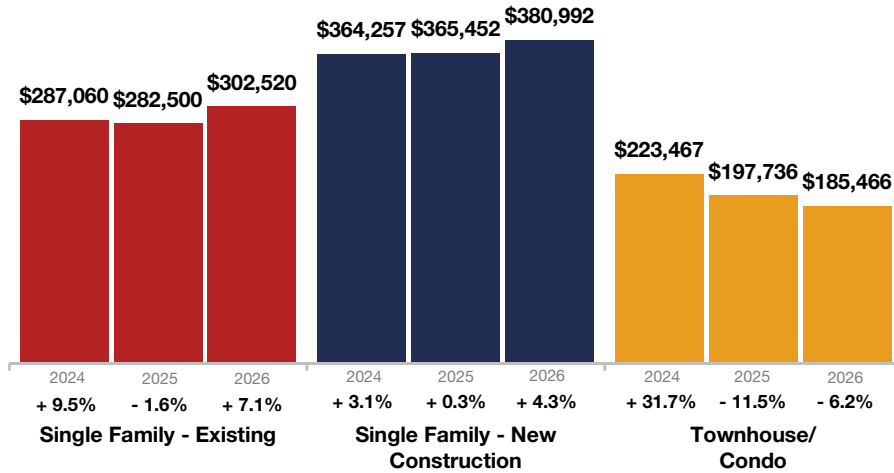
* Median Sales Price for all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Average Sales Price

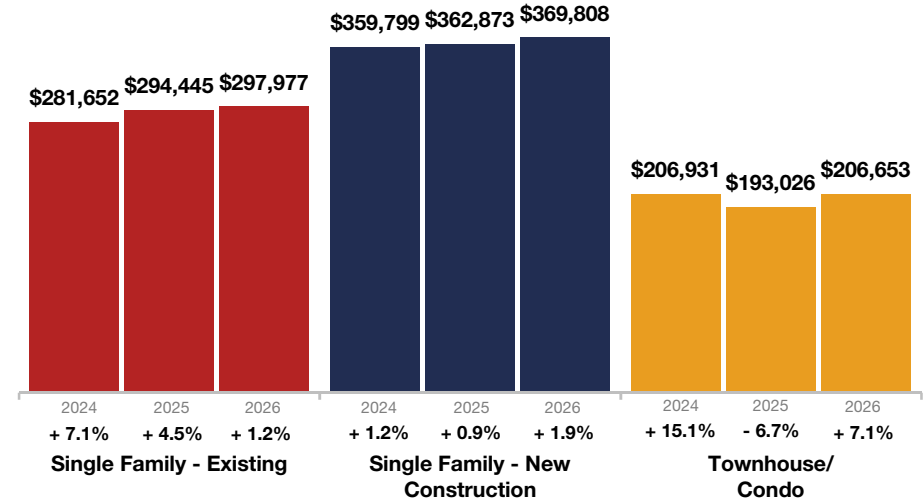
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



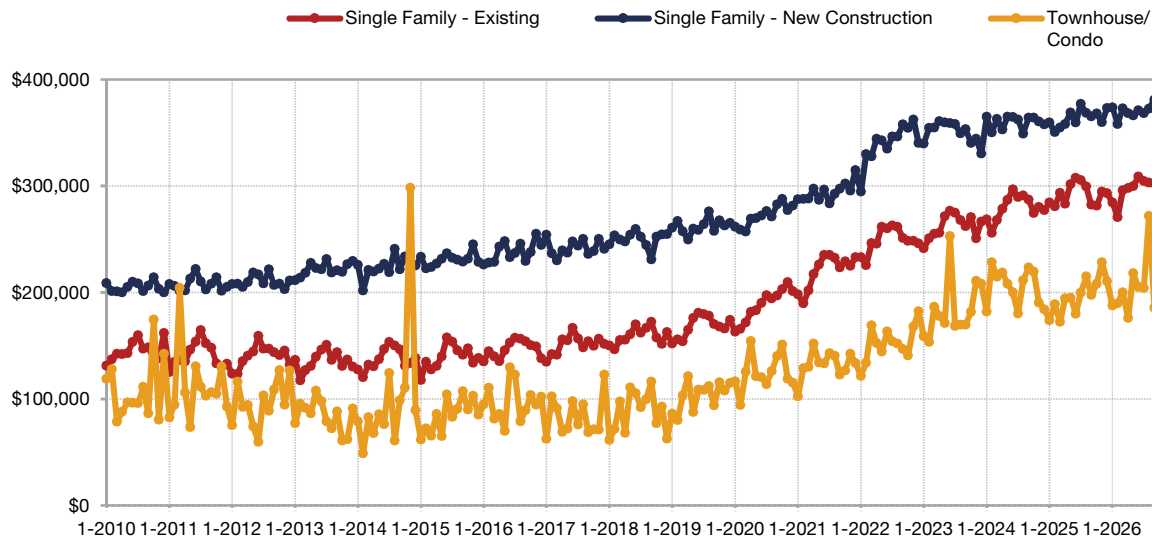
September



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
October 2025	\$281,522	\$368,148	\$208,169
November 2025	\$294,677	\$359,883	\$228,390
December 2025	\$293,260	\$373,001	\$210,596
January 2026	\$284,446	\$373,816	\$187,814
February 2026	\$270,720	\$357,995	\$189,871
March 2026	\$295,913	\$372,746	\$200,099
April 2026	\$297,914	\$368,192	\$175,852
May 2026	\$299,712	\$366,302	\$217,950
June 2026	\$308,846	\$371,168	\$204,993
July 2026	\$304,663	\$368,430	\$204,248
August 2026	\$303,118	\$372,570	\$271,744
September 2026	\$302,520	\$380,992	\$185,466
12-Month Avg.*	\$294,776	\$369,437	\$207,099

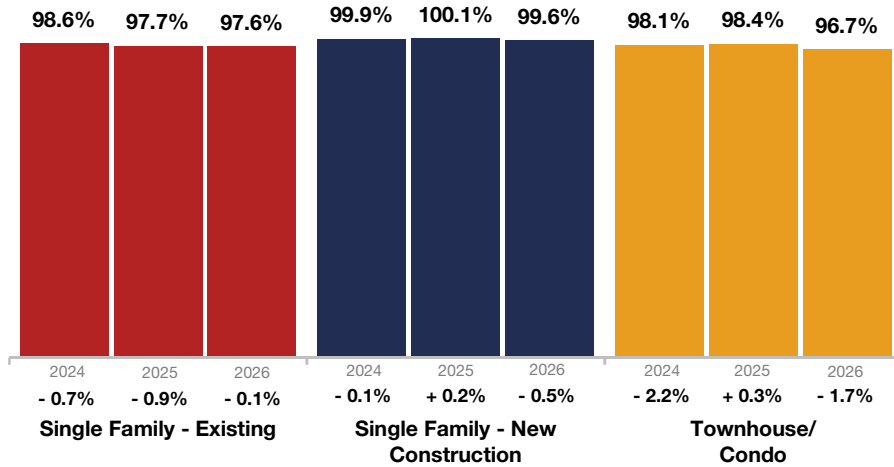
* Avg. Sales Price for all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Percent of List Price Received

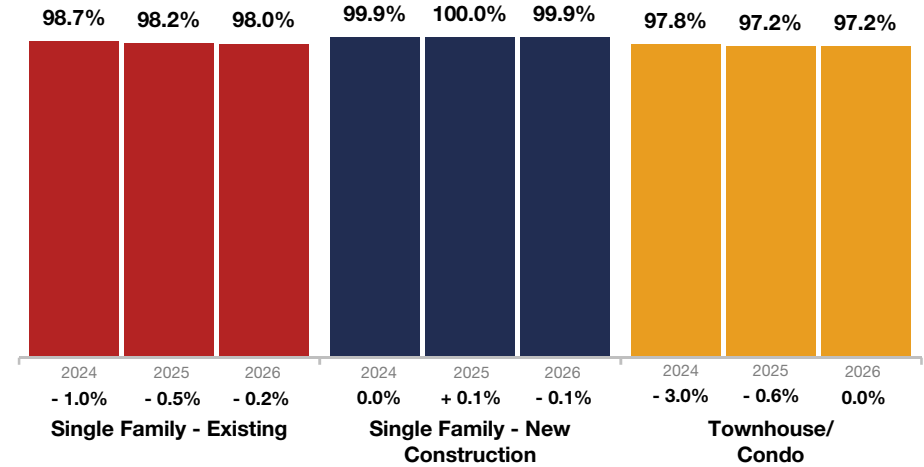
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



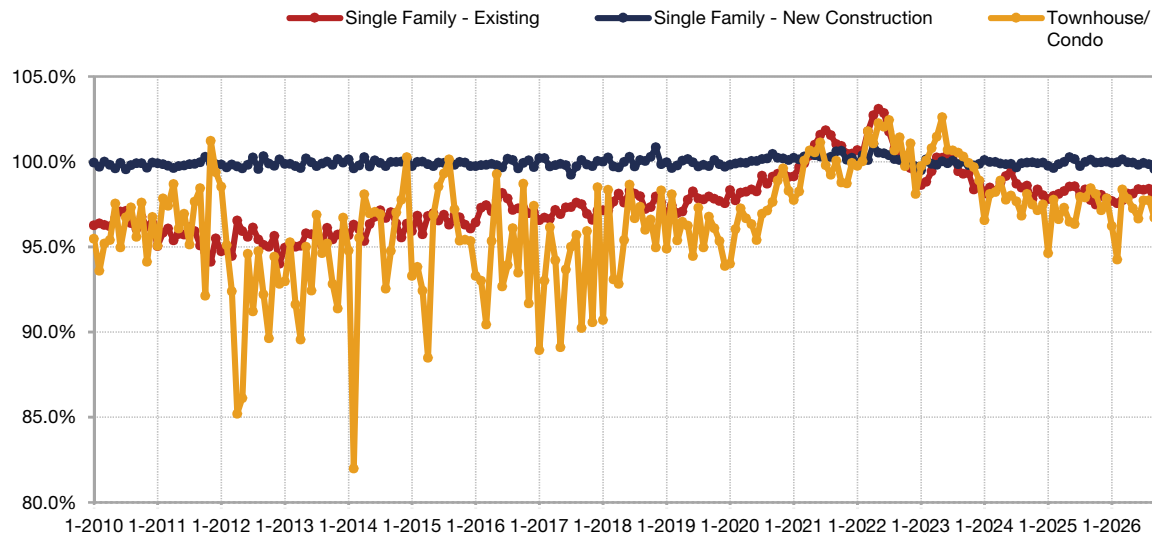
September



Year to Date



Historical Percent of List Price Received by Month



	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
October 2025	97.5%	99.9%	98.1%
November 2025	98.0%	100.0%	97.1%
December 2025	97.8%	100.0%	97.8%
January 2026	97.7%	99.9%	96.2%
February 2026	97.6%	100.0%	94.3%
March 2026	97.7%	100.1%	98.4%
April 2026	98.1%	100.0%	97.8%
May 2026	98.1%	99.9%	97.3%
June 2026	98.4%	99.8%	96.7%
July 2026	98.4%	99.9%	97.7%
August 2026	98.4%	99.9%	97.7%
September 2026	97.6%	99.6%	96.7%
12-Month Avg.*	97.9%	99.9%	97.1%

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

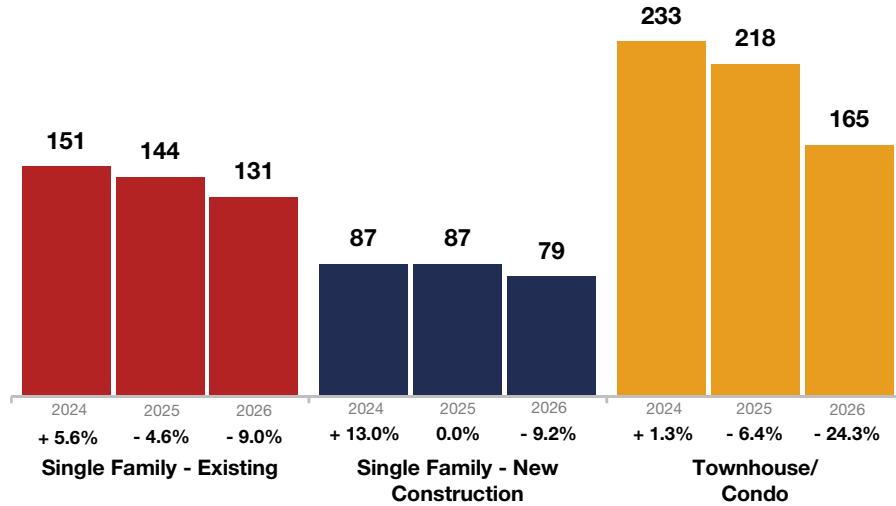
Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

Housing Affordability Index

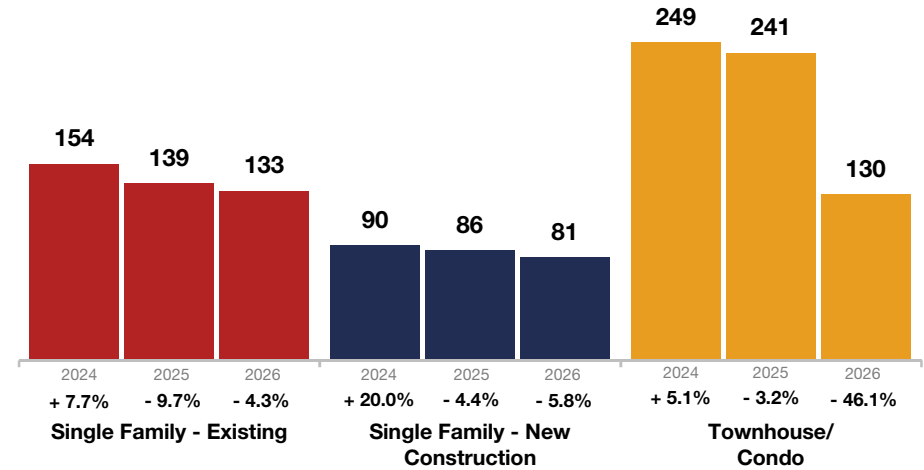
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



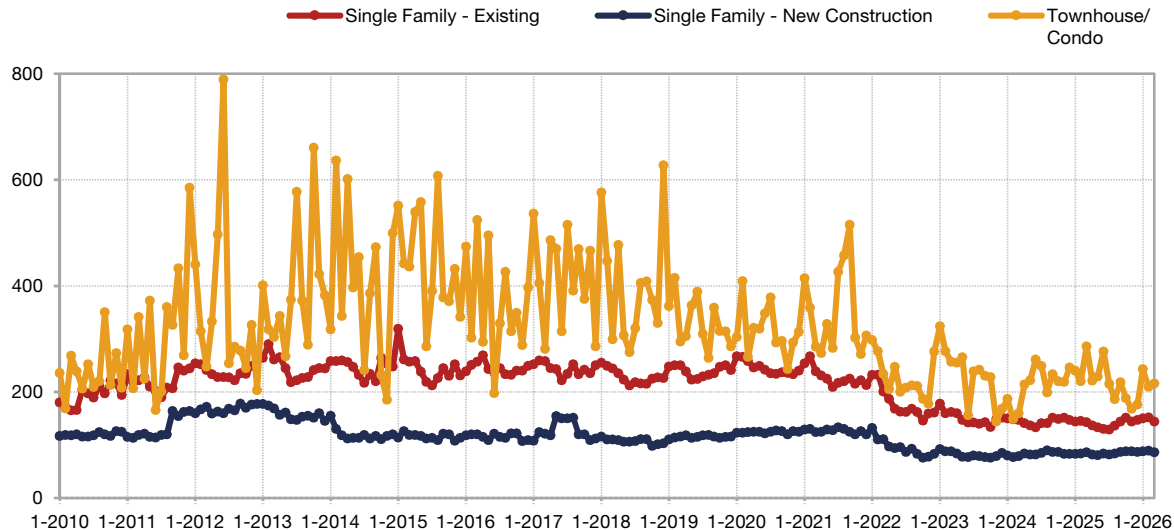
September



Year to Date



Historical Housing Affordability Index 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
October 2025	151	88	188
November 2025	144	88	168
December 2025	147	87	176
January 2026	150	88	243
February 2026	152	89	210
March 2026	144	86	216
April 2026	146	87	253
May 2026	139	87	198
June 2026	134	85	174
July 2026	132	83	126
August 2026	137	82	168
September 2026	131	79	165
12-Month Avg.*	142	86	190

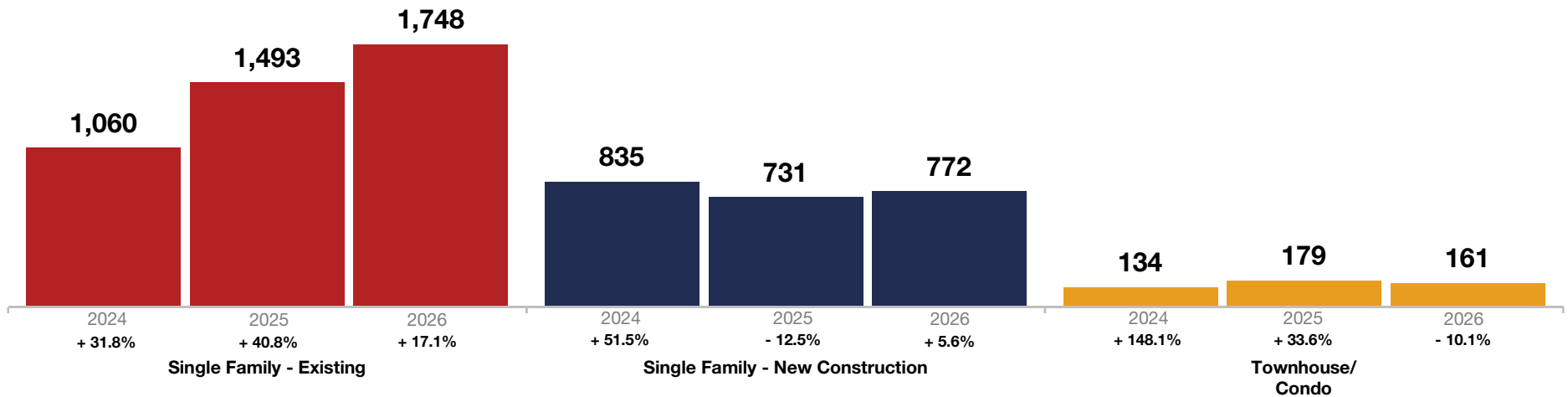
* Affordability Index for all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Inventory of Homes for Sale

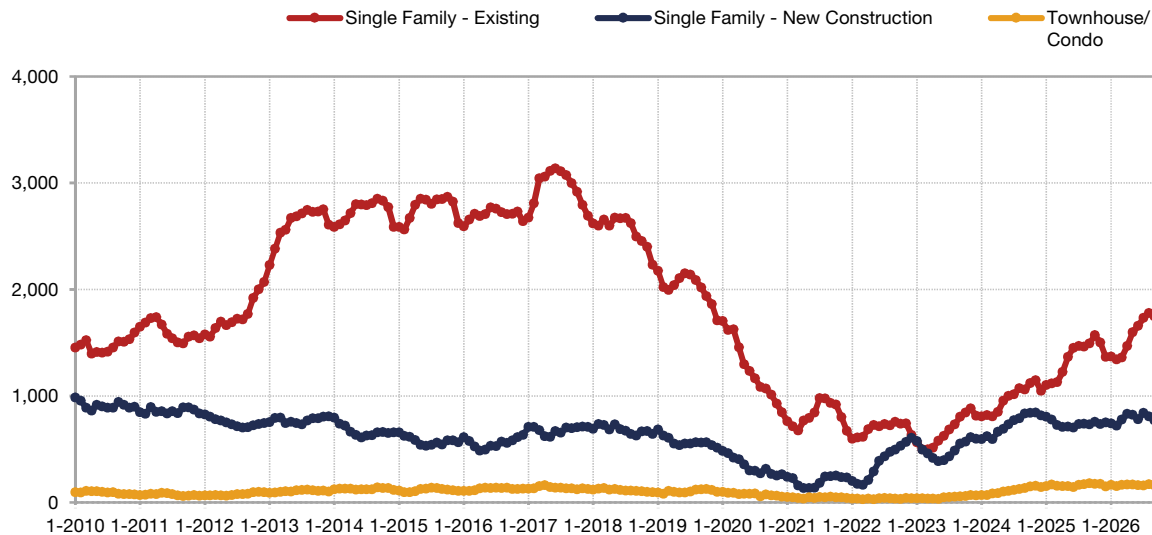
The number of properties available for sale in active status at the end of a given month.



September



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.

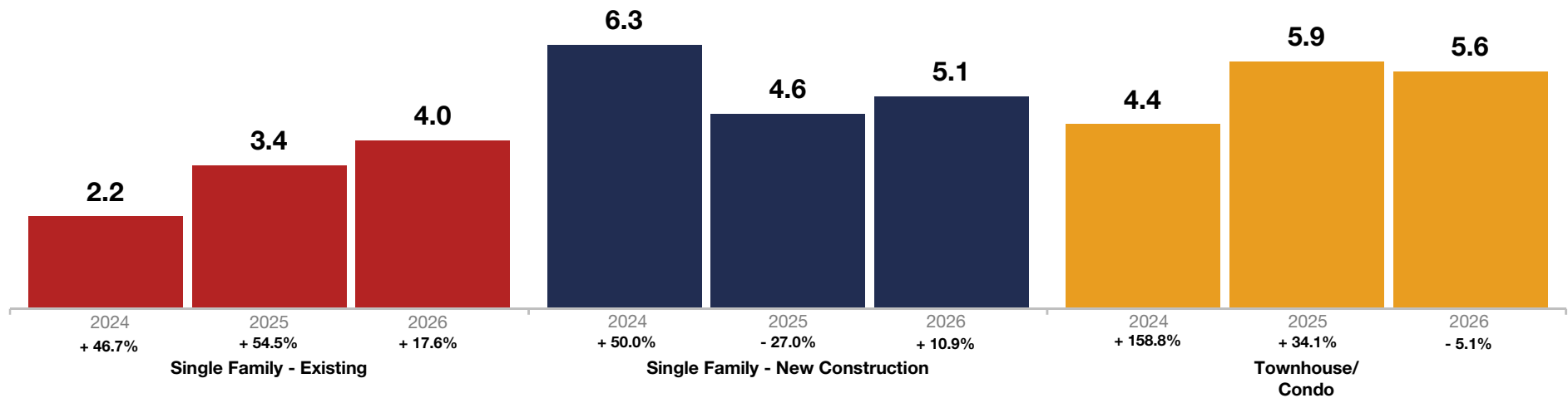
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
October 2025	1,571	756	172
November 2025	1,502	736	174
December 2025	1,366	749	150
January 2026	1,370	742	164
February 2026	1,342	721	151
March 2026	1,361	777	165
April 2026	1,468	832	166
May 2026	1,598	821	167
June 2026	1,656	780	162
July 2026	1,734	839	159
August 2026	1,777	808	169
September 2026	1,748	772	161
12-Month Avg.	1,541	778	163

Months Supply of Inventory

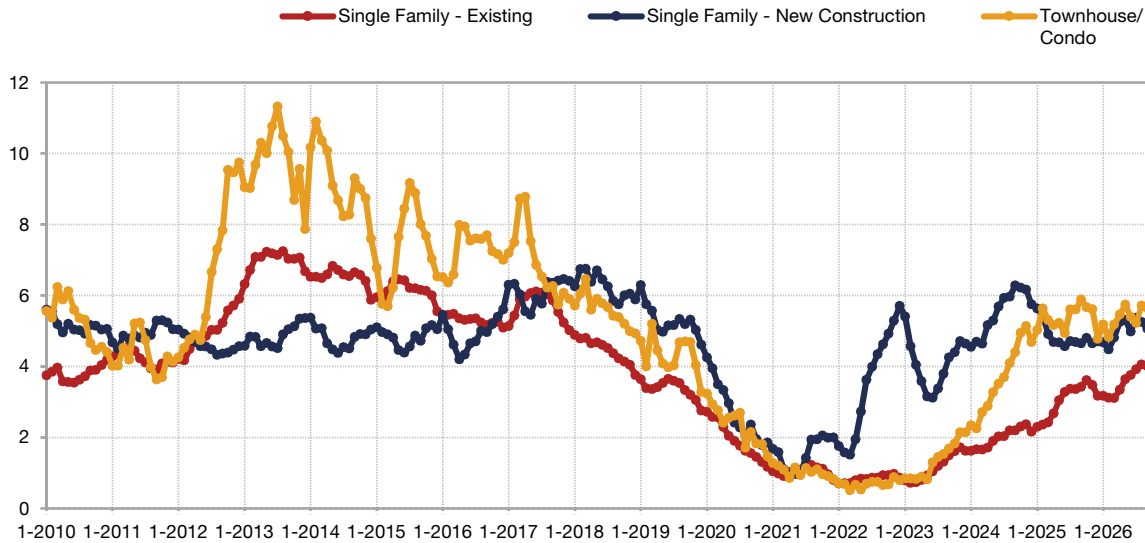
The inventory of homes for sale at the end of a given month, divided by the average monthly closed sales from the last 12 months.



September



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
October 2025	3.6	4.8	5.7
November 2025	3.5	4.6	5.6
December 2025	3.2	4.7	4.8
January 2026	3.2	4.7	5.2
February 2026	3.1	4.5	4.8
March 2026	3.1	4.8	5.2
April 2026	3.3	5.3	5.5
May 2026	3.6	5.3	5.7
June 2026	3.8	5.0	5.4
July 2026	3.9	5.4	5.2
August 2026	4.1	5.2	5.7
September 2026	4.0	5.1	5.6
12-Month Avg.*	3.5	4.9	5.4

* Months Supply for all properties from October 2025 through September 2026. 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	9-2025	9-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		824	755	- 8.4%	8,433	8,373	- 0.7%
Pending Sales		569	541	- 4.9%	5,917	5,859	- 1.0%
Closed Sales		601	543	- 9.7%	5,709	5,647	- 1.1%
Days on Market		58	65	+ 12.1%	58	65	+ 12.1%
Median Sales Price		\$289,450	\$299,995	+ 3.6%	\$298,000	\$299,900	+ 0.6%
Avg. Sales Price		\$296,091	\$315,043	+ 6.4%	\$306,949	\$311,560	+ 1.5%
Pct. of List Price Received		98.3%	98.0%	- 0.3%	98.6%	98.5%	- 0.1%
Affordability Index		131	121	- 7.6%	128	121	- 5.5%
Homes for Sale		2,403	2,681	+ 11.6%	--	--	--
Months Supply		3.8	4.3	+ 13.2%	--	--	--