

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.

- Single Family - Existing Homes Closed Sales were down 8.4 percent to 381.
- Single Family - New Construction Closed Sales were up 3.7 percent to 170.
- Townhouse/Condo Closed Sales were up 17.2 percent to 34.
- Single Family - Existing Homes Median Sales Price increased 6.7 percent to \$272,000.
- Single Family - New Construction Median Sales Price increased 1.0 percent to \$349,450.
- Townhouse/Condo Median Sales Price increased 49.5 percent to \$239,250.

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

- 3.9% **+ 4.5%** **+ 9.4%**

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.


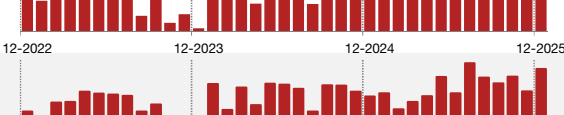



Key Metrics	Historical Sparklines	12-2024	12-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		391	397	+ 1.5%	7,554	7,631	+ 1.0%
Pending Sales		309	355	+ 14.9%	5,772	5,309	- 8.0%
Closed Sales		416	381	- 8.4%	5,805	5,116	- 11.9%
Days on Market		35	53	+ 51.4%	30	43	+ 43.3%
Median Sales Price		\$255,000	\$272,000	+ 6.7%	\$260,000	\$274,000	+ 5.4%
Avg. Sales Price		\$277,077	\$289,249	+ 4.4%	\$280,625	\$293,319	+ 4.5%
Pct. of List Price Received		98.0%	97.8%	- 0.2%	98.6%	98.1%	- 0.5%
Affordability Index		138	139	+ 0.7%	136	138	+ 1.5%
Homes for Sale		1,047	1,310	+ 25.1%	--	--	--
Months Supply		2.2	3.1	+ 40.9%	--	--	--

Single Family - New Construction Market Overview



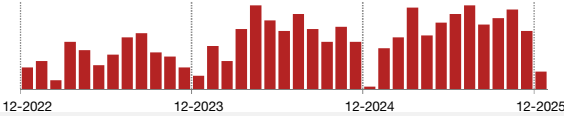



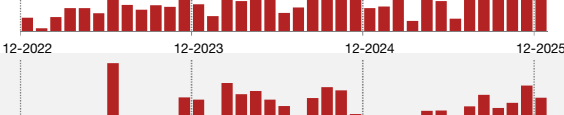

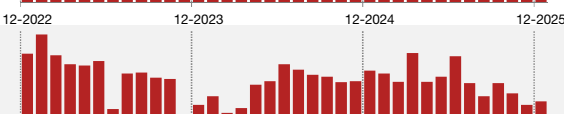



Key metrics for **Single Family - New Construction Properties Only** for the report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparklines	12-2024	12-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		171	193	+ 12.9%	2,464	2,464	0.0%
Pending Sales		141	136	- 3.5%	1,738	1,875	+ 7.9%
Closed Sales		164	170	+ 3.7%	1,705	1,904	+ 11.7%
Days on Market		107	98	- 8.4%	93	102	+ 9.7%
Median Sales Price		\$346,025	\$349,450	+ 1.0%	\$339,950	\$348,000	+ 2.4%
Avg. Sales Price		\$357,818	\$373,663	+ 4.4%	\$360,020	\$364,184	+ 1.2%
Pct. of List Price Received		99.9%	100.0%	+ 0.1%	99.9%	100.0%	+ 0.1%
Affordability Index		79	82	+ 3.8%	80	83	+ 3.8%
Homes for Sale		818	744	- 9.0%	--	--	--
Months Supply		5.8	4.7	- 19.0%	--	--	--

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.



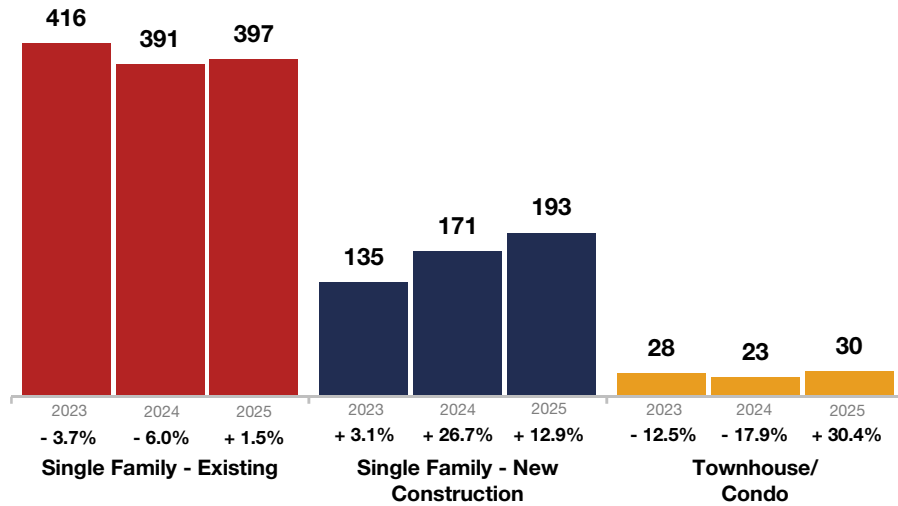
Key Metrics	Historical Sparklines	12-2024	12-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		23	30	+ 30.4%	560	610	+ 8.9%
Pending Sales		19	23	+ 21.1%	357	395	+ 10.6%
Closed Sales		29	34	+ 17.2%	368	375	+ 1.9%
Days on Market		55	60	+ 9.1%	43	62	+ 44.2%
Median Sales Price		\$160,000	\$239,250	+ 49.5%	\$174,000	\$180,000	+ 3.4%
Avg. Sales Price		\$184,138	\$210,596	+ 14.4%	\$205,125	\$197,792	- 3.6%
Pct. of List Price Received		97.5%	97.8%	+ 0.3%	97.7%	97.3%	- 0.4%
Affordability Index		233	167	- 28.3%	214	222	+ 3.7%
Homes for Sale		144	144	0.0%	--	--	--
Months Supply		4.7	4.6	- 2.1%	--	--	--

New Listings

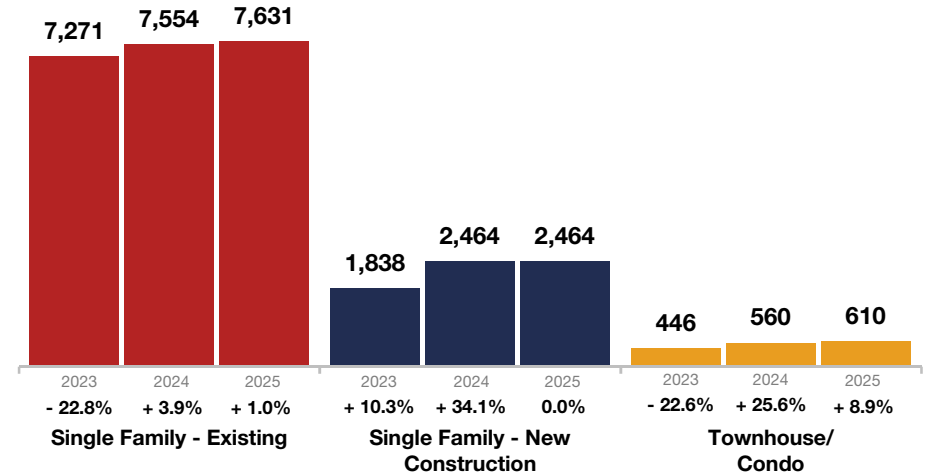
A count of the properties that have been newly listed on the market in a given month.



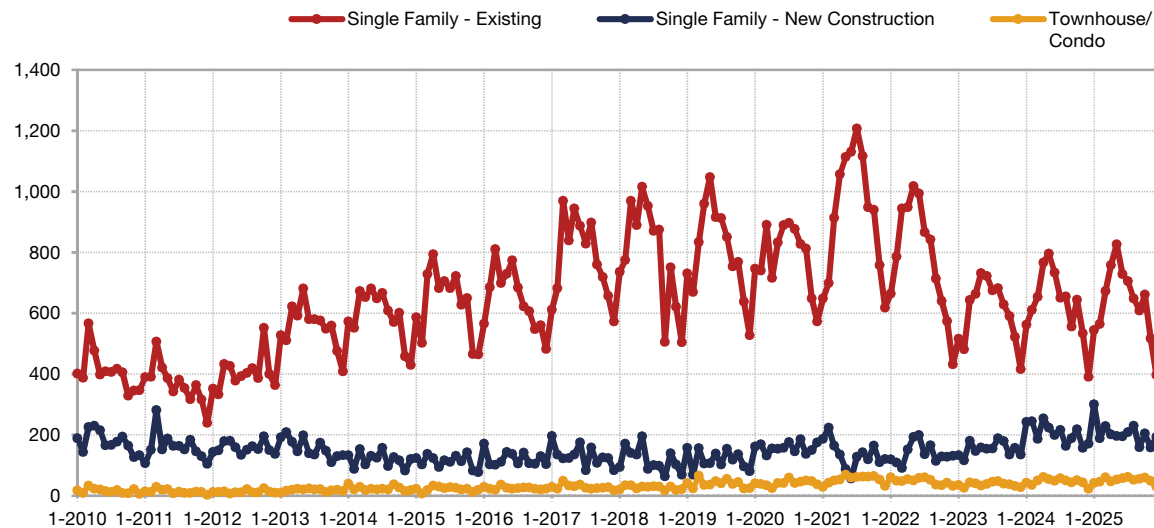
December



Year to Date



Historical New Listings by Month



	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
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	517	158	49
December 2025	397	193	30
12-Month Avg.	636	205	51

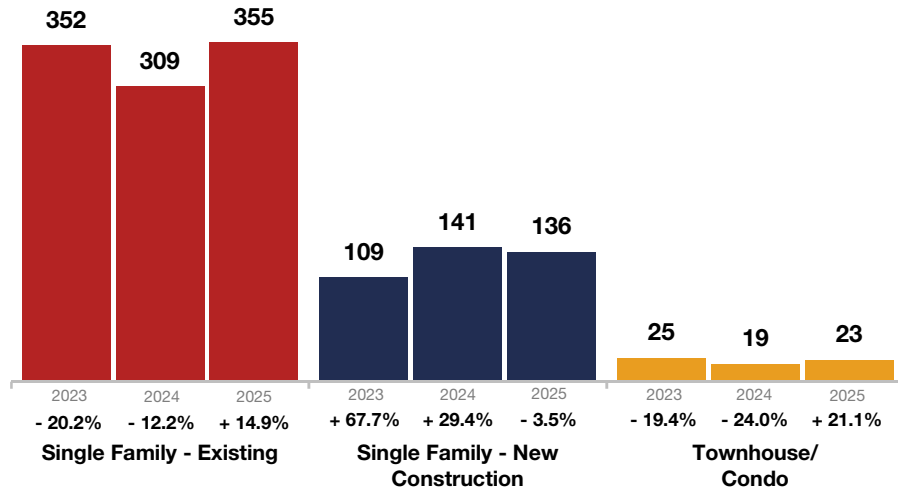
Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

Pending Sales

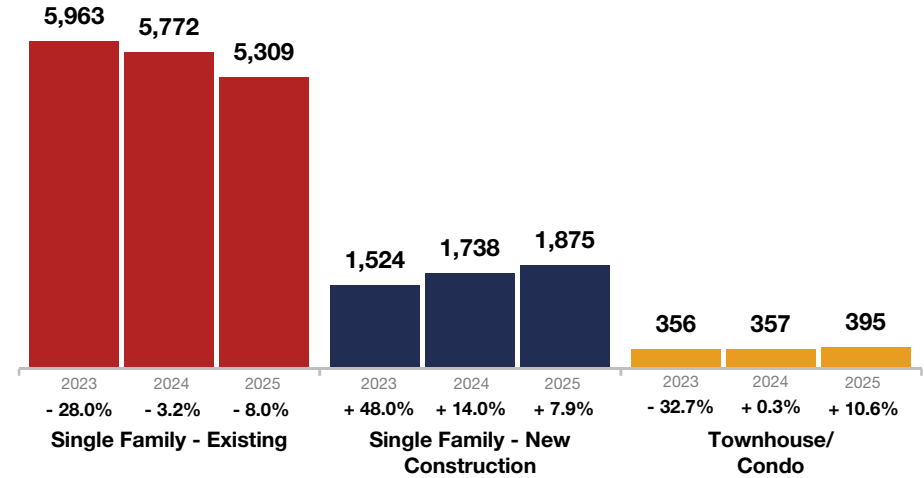
A count of the properties on which offers have been accepted in a given month.



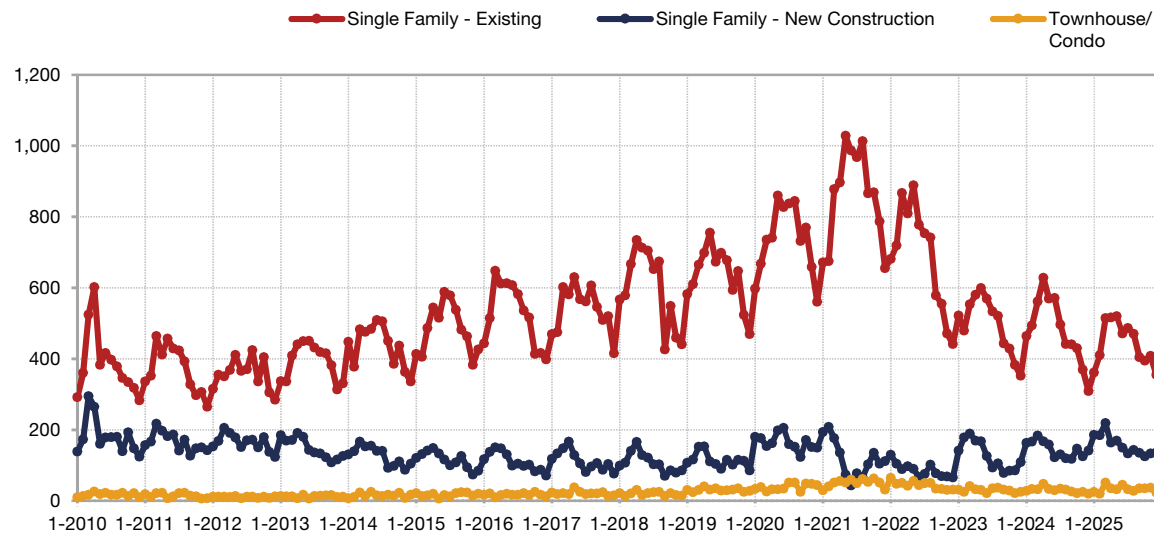
December



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.

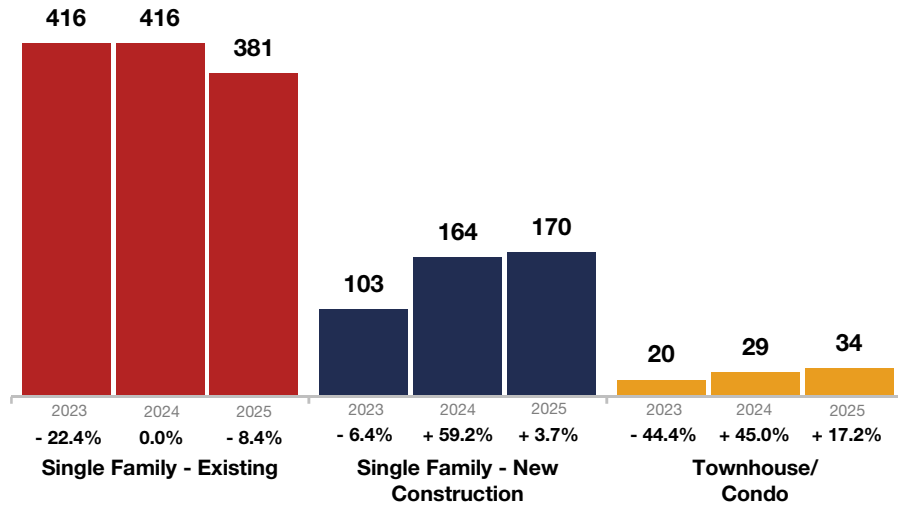
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
January 2025	361	185	25
February 2025	410	184	19
March 2025	514	219	51
April 2025	516	164	35
May 2025	520	169	32
June 2025	471	149	45
July 2025	486	133	32
August 2025	470	143	27
September 2025	404	135	35
October 2025	394	125	35
November 2025	408	133	36
December 2025	355	136	23
12-Month Avg.	442	156	33

Closed Sales

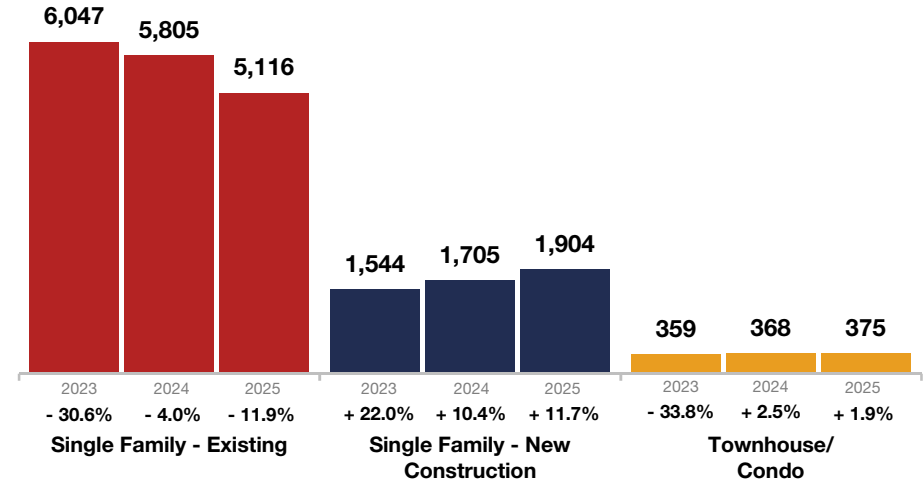
A count of the actual sales that closed in a given month.



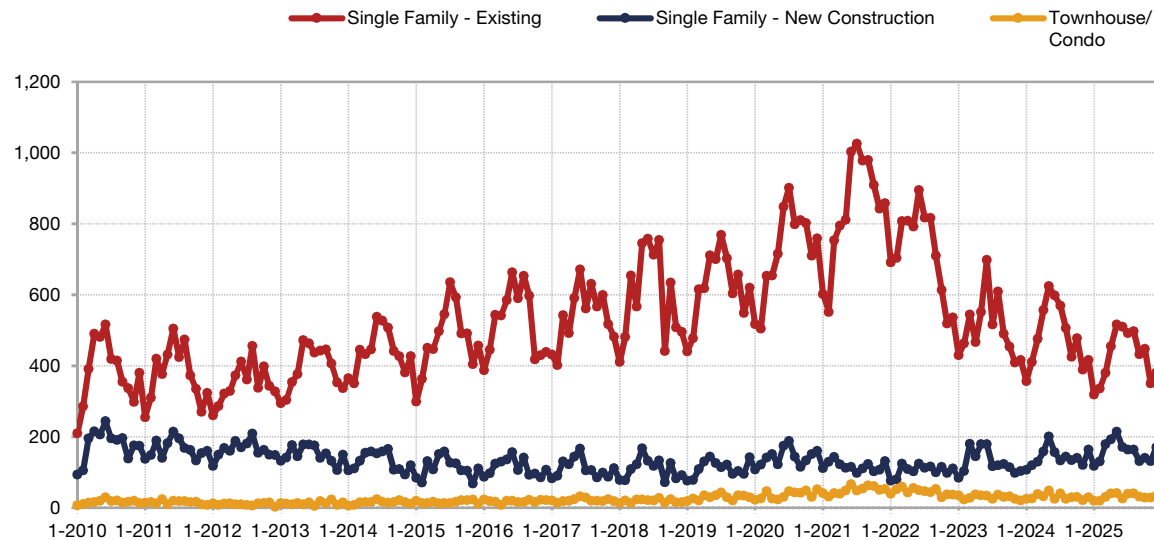
December



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.

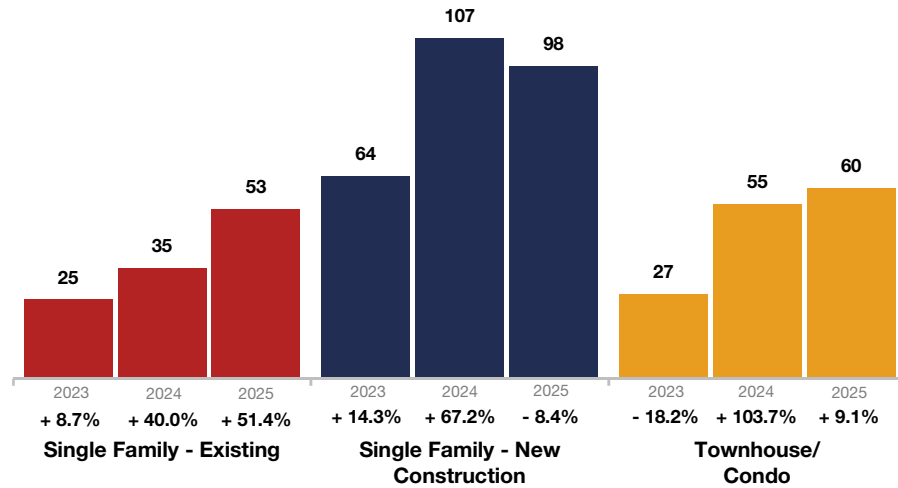
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
January 2025	319	118	19
February 2025	336	130	19
March 2025	380	179	30
April 2025	455	192	40
May 2025	516	214	41
June 2025	510	171	26
July 2025	492	164	39
August 2025	497	164	40
September 2025	432	131	31
October 2025	448	140	28
November 2025	350	131	28
December 2025	381	170	34
12-Month Avg.	426	159	31

Days on Market Until Sale

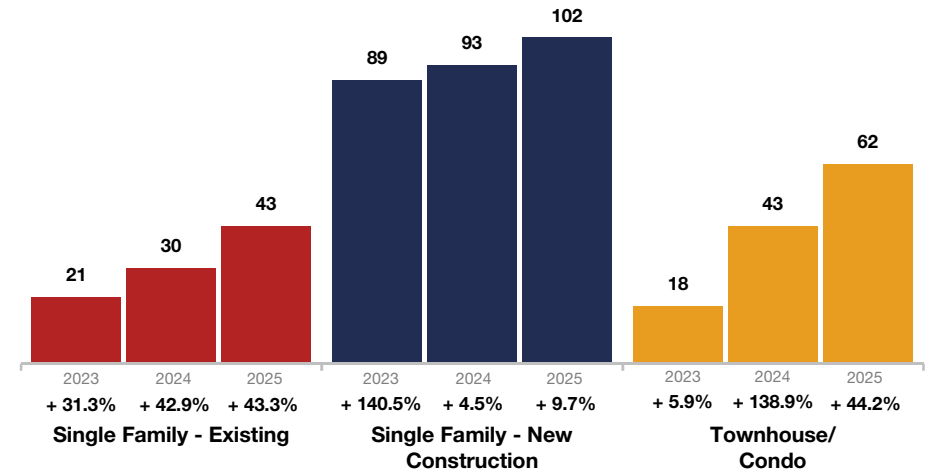
Average number of days between when a property is listed and when an offer is accepted in a given month.



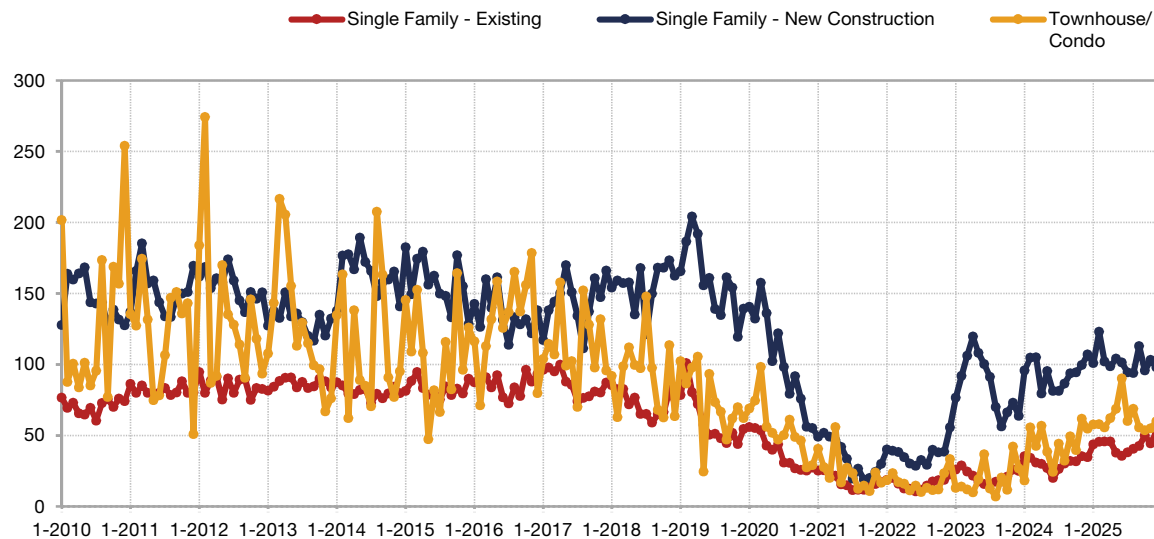
December



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
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	94	60
August 2025	41	94	69
September 2025	43	113	55
October 2025	50	96	54
November 2025	44	103	55
December 2025	53	98	60
12-Month Avg.*	43	102	62

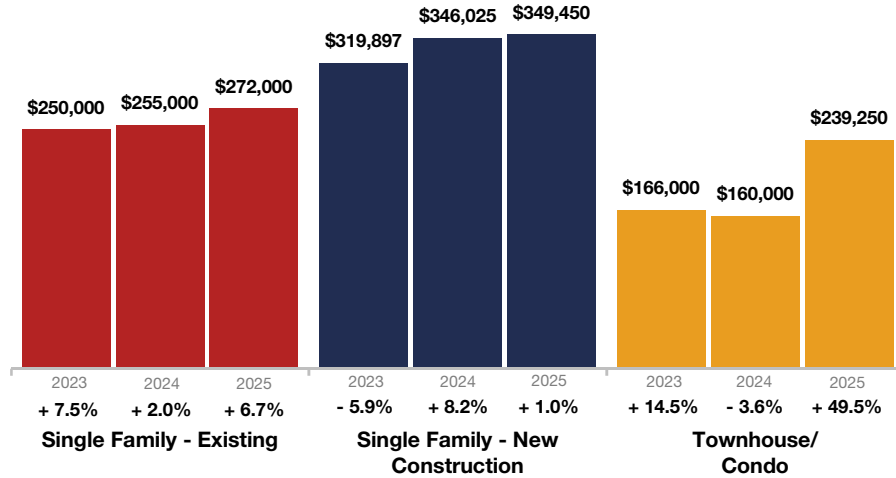
* Days on Market for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Median Sales Price

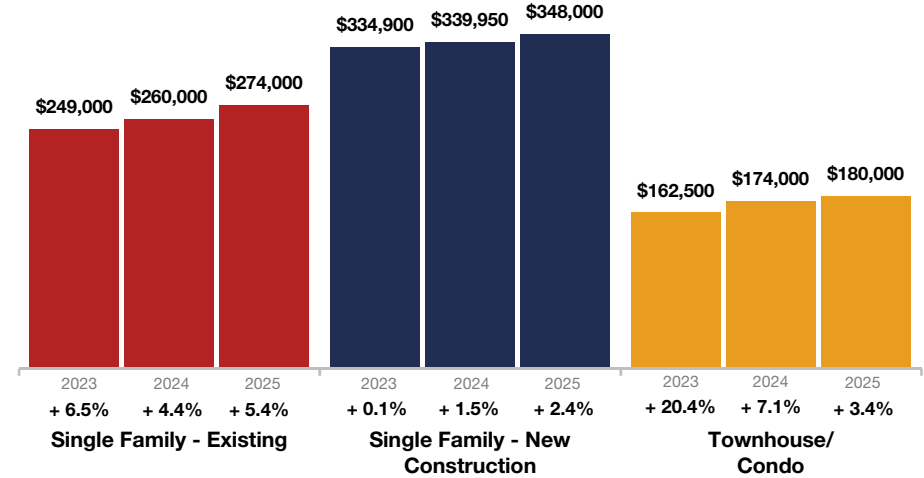
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



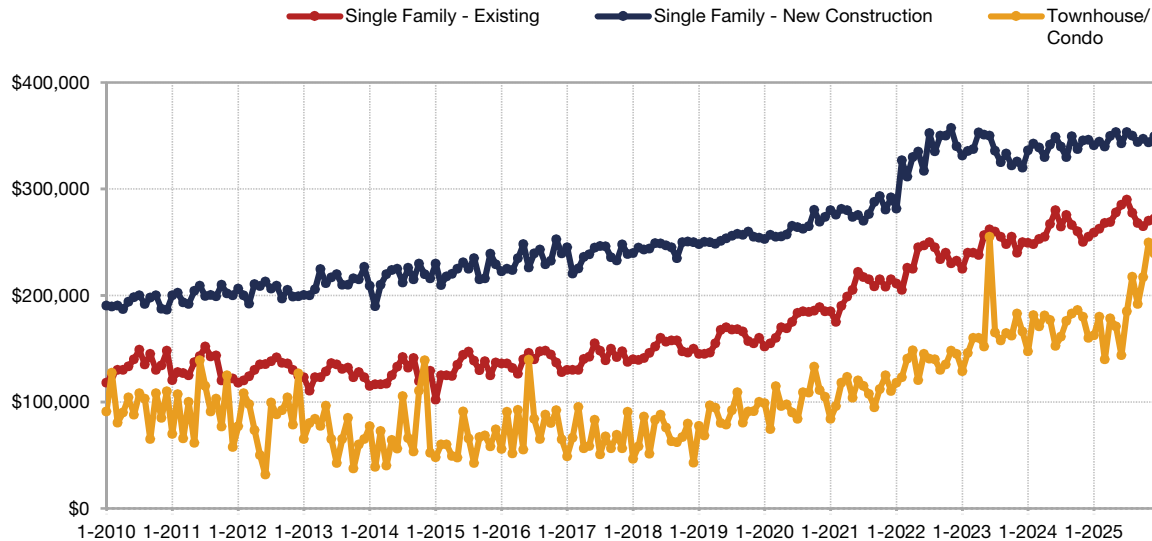
December



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
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	\$353,377	\$185,000
August 2025	\$277,500	\$349,950	\$217,500
September 2025	\$268,000	\$344,100	\$192,000
October 2025	\$264,950	\$346,900	\$217,000
November 2025	\$270,000	\$343,758	\$249,500
December 2025	\$272,000	\$349,450	\$239,250
12-Month Med.*	\$274,000	\$348,000	\$180,000

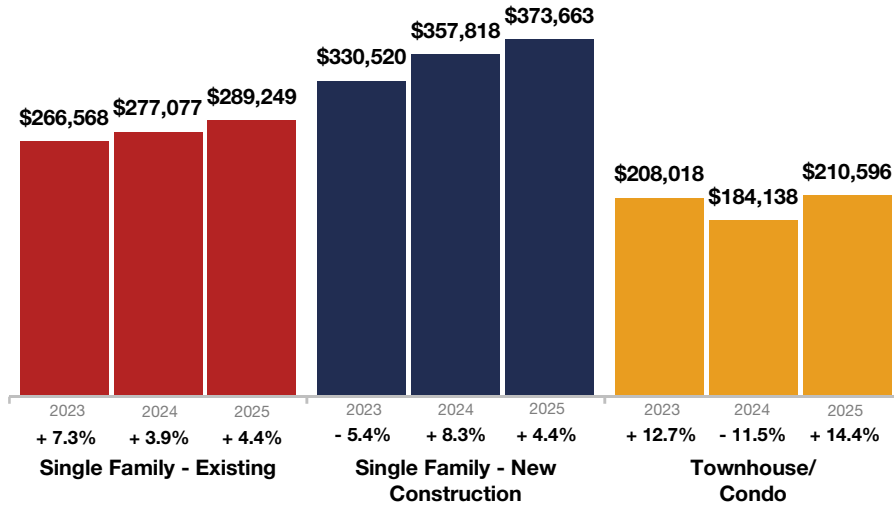
* Median Sales Price for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Average Sales Price

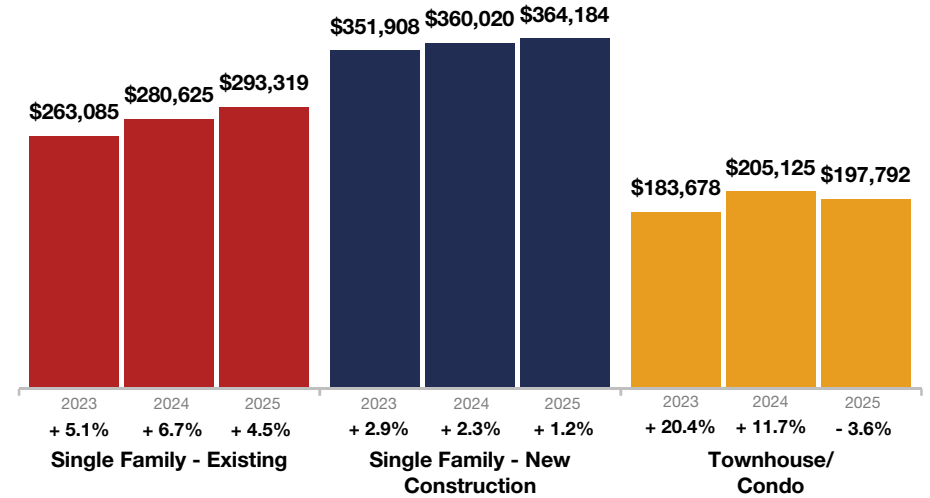
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



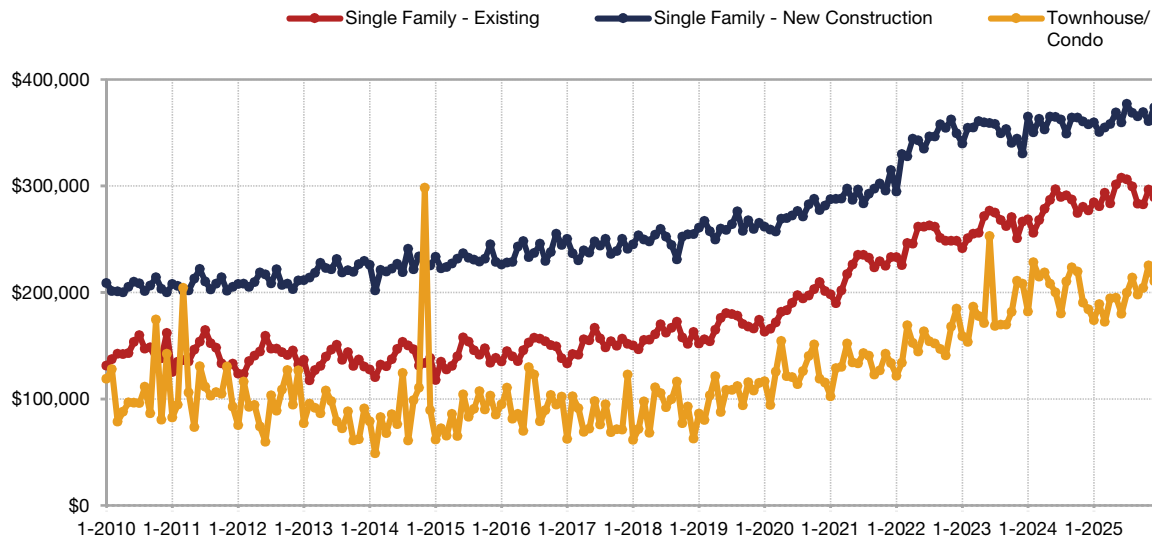
December



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
January 2025	\$284,590	\$359,678	\$173,797
February 2025	\$280,973	\$350,626	\$189,011
March 2025	\$293,603	\$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	\$306,179	\$376,909	\$199,708
August 2025	\$299,384	\$368,625	\$213,805
September 2025	\$283,388	\$365,452	\$197,953
October 2025	\$282,576	\$369,313	\$204,175
November 2025	\$296,560	\$360,812	\$225,296
December 2025	\$289,249	\$373,663	\$210,596
12-Month Avg.*	\$293,319	\$364,184	\$197,792

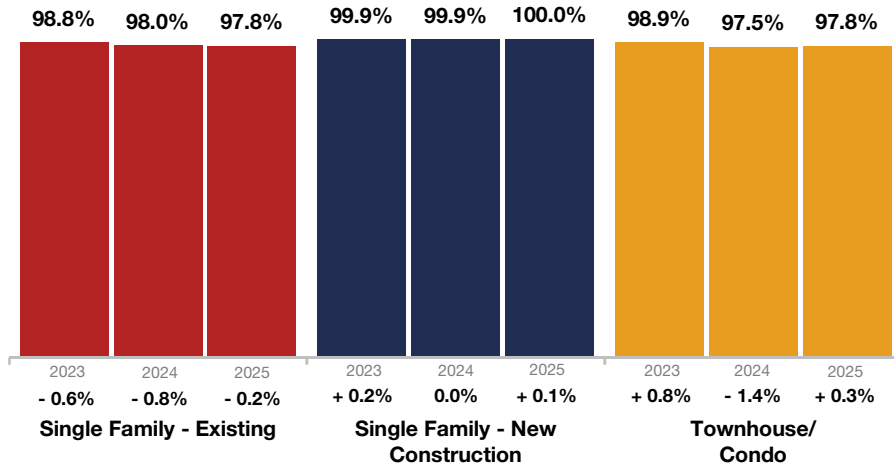
* Avg. Sales Price for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Percent of List Price Received

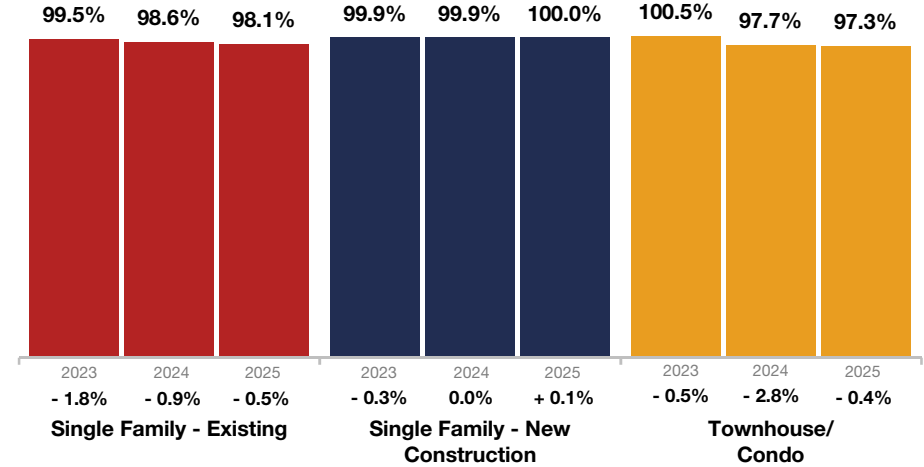
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



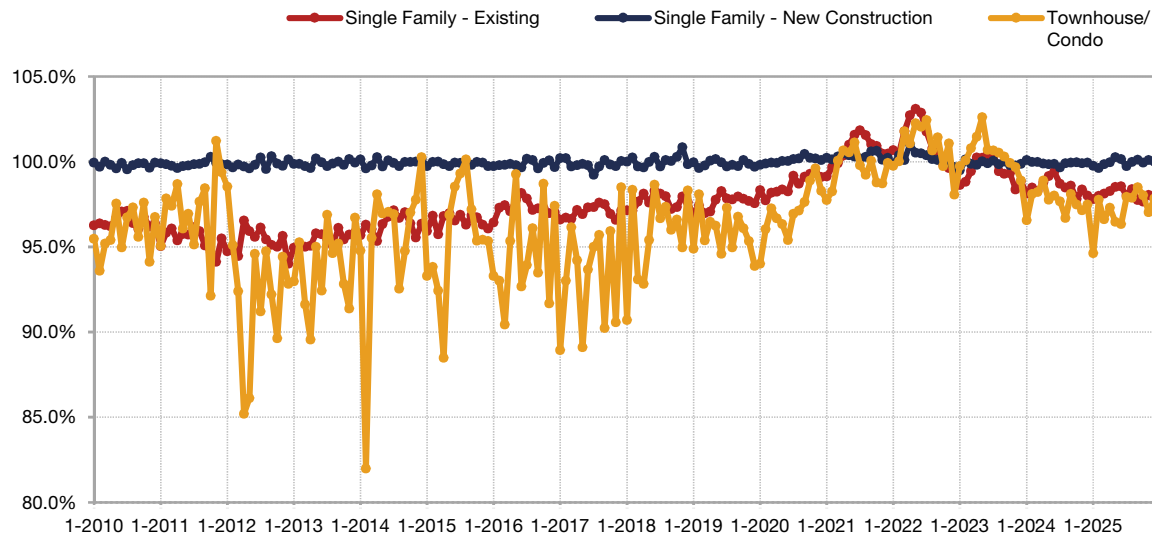
December



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.

	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
January 2025	97.8%	99.7%	94.6%
February 2025	98.0%	99.6%	97.8%
March 2025	98.1%	99.8%	96.6%
April 2025	98.3%	100.0%	97.3%
May 2025	98.5%	100.3%	96.5%
June 2025	98.6%	100.1%	96.3%
July 2025	98.0%	99.7%	97.9%
August 2025	98.4%	100.0%	97.9%
September 2025	97.8%	100.1%	98.5%
October 2025	97.6%	99.9%	98.0%
November 2025	98.0%	100.1%	97.0%
December 2025	97.8%	100.0%	97.8%
12-Month Avg.*	98.1%	100.0%	97.3%

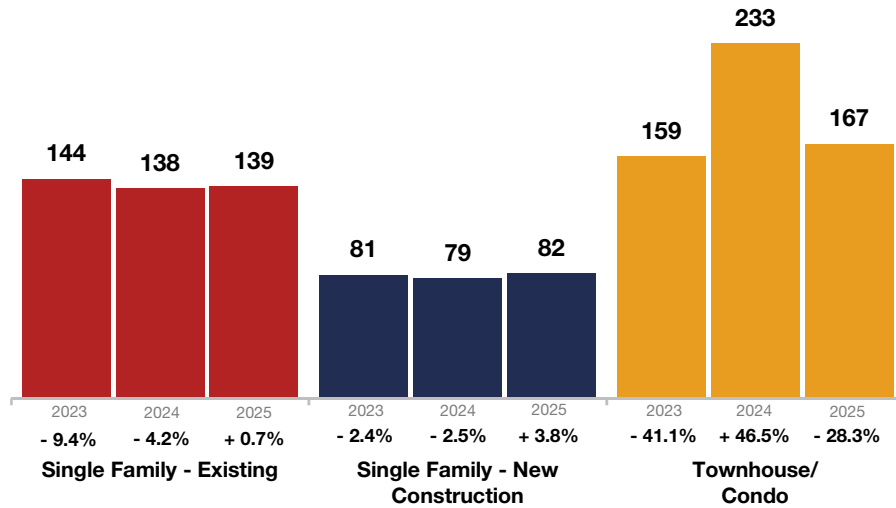
* Pct. of List Price Received for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Housing Affordability Index

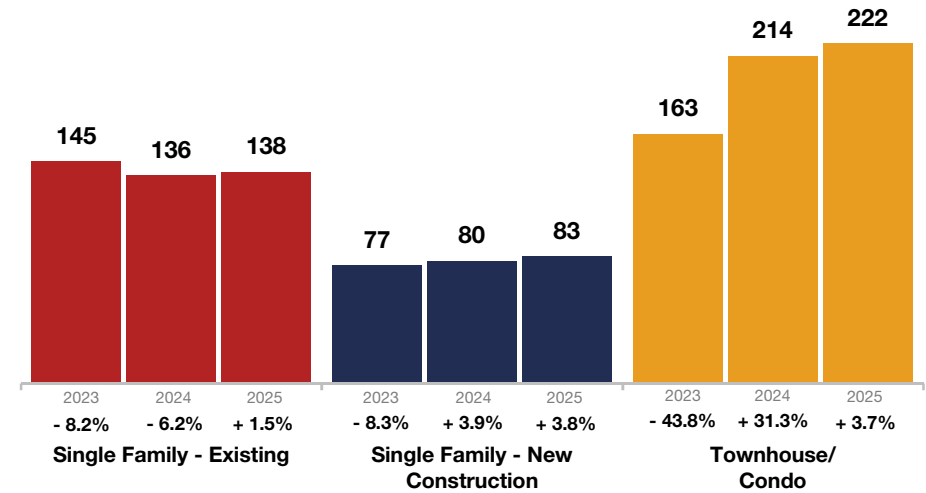
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



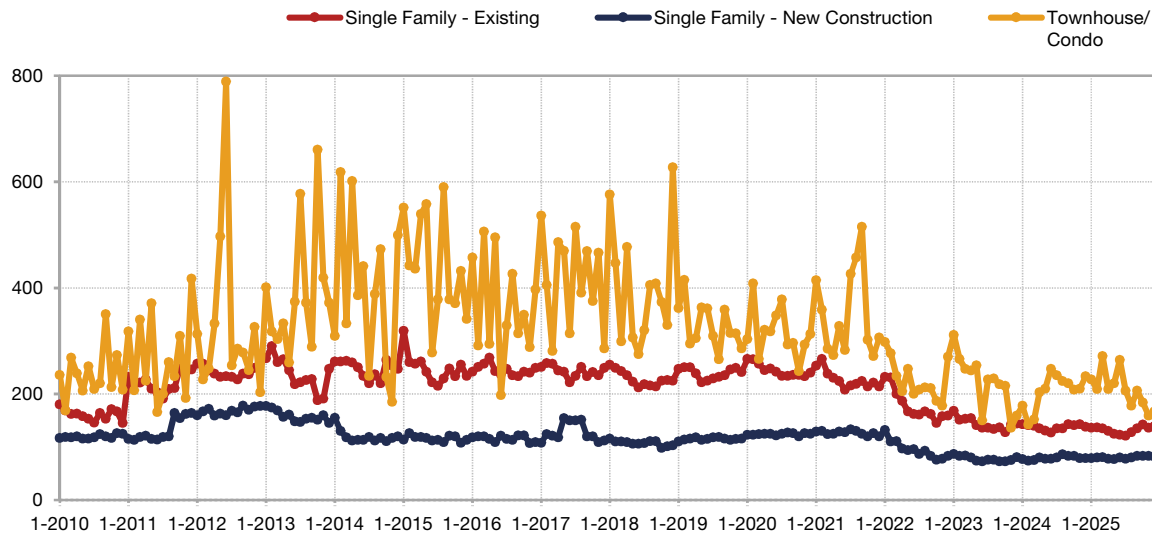
December



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
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	78	206
August 2025	128	80	178
September 2025	135	83	206
October 2025	142	83	184
November 2025	136	83	159
December 2025	139	82	167
12-Month Avg.*	132	80	208

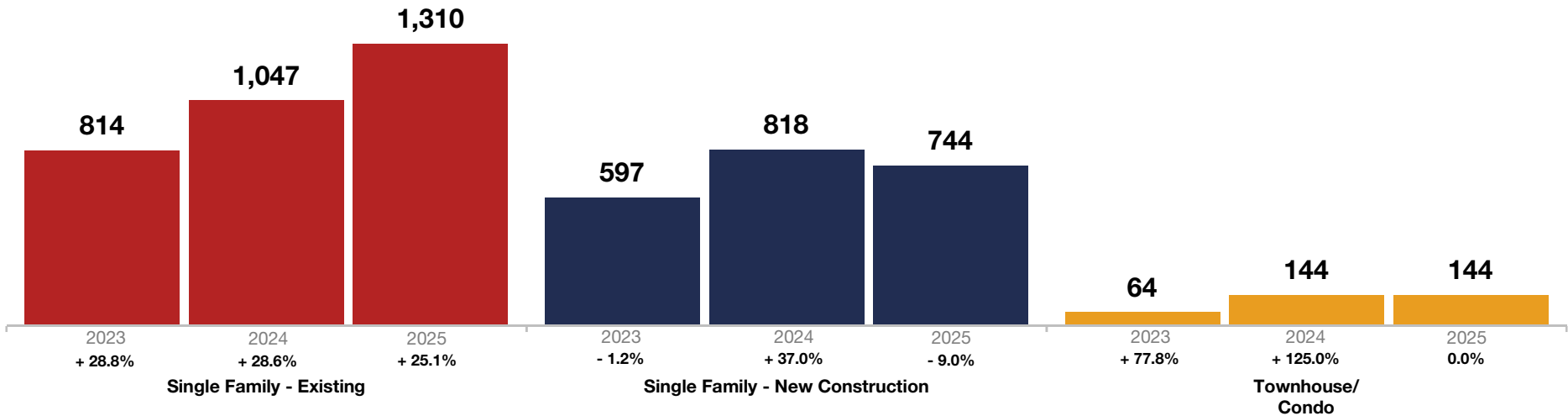
* Affordability Index for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Inventory of Homes for Sale

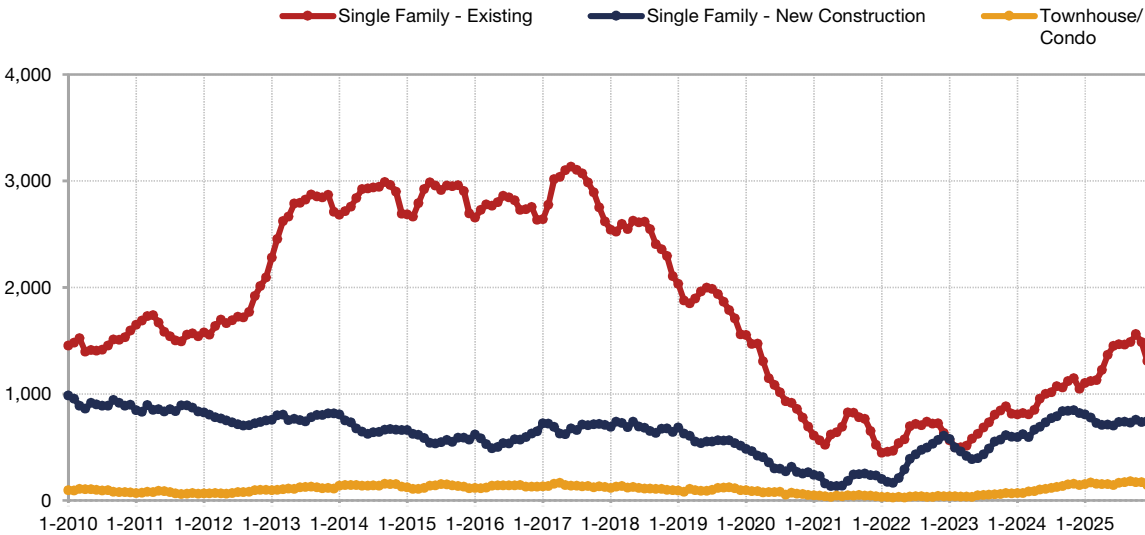
The number of properties available for sale in active status at the end of a given month.



December



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.

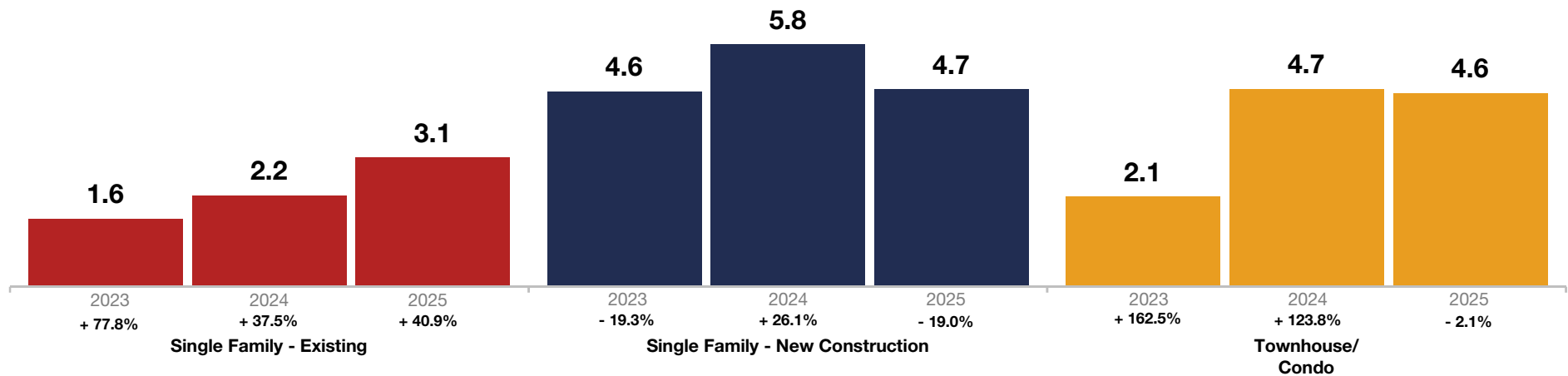
	Single Family - Existing	Single Family - New Construction	Townhouse/Condo
January 2025	1,102	806	152
February 2025	1,118	778	167
March 2025	1,127	727	154
April 2025	1,225	708	153
May 2025	1,365	711	152
June 2025	1,449	701	144
July 2025	1,466	735	163
August 2025	1,461	738	170
September 2025	1,485	730	178
October 2025	1,561	755	170
November 2025	1,486	735	171
December 2025	1,310	744	144
12-Month Avg.	1,346	739	160

Months Supply of Inventory

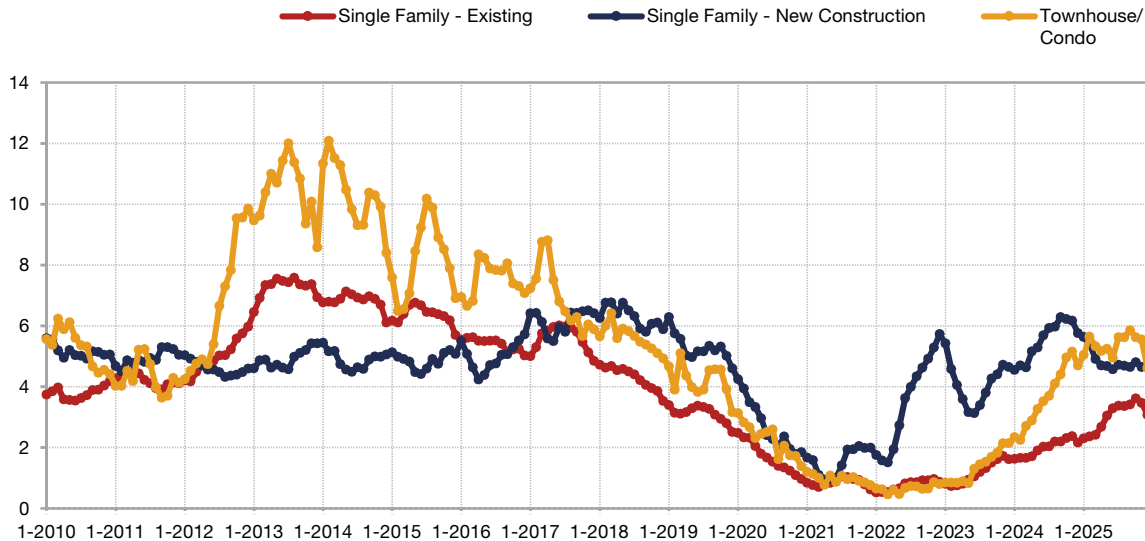
The inventory of homes for sale at the end of a given month, divided by the average monthly closed sales from the last 12 months.



December



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
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	3.5	4.6	5.5
December 2025	3.1	4.7	4.6
12-Month Avg.*	3.0	4.8	5.4

* Months Supply for all properties from January 2025 through December 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	12-2024	12-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		585	620	+ 6.0%	10,578	10,705	+ 1.2%
Pending Sales		469	514	+ 9.6%	7,867	7,579	- 3.7%
Closed Sales		609	585	- 3.9%	7,878	7,395	- 6.1%
Days on Market		55	67	+ 21.8%	44	59	+ 34.1%
Median Sales Price		\$286,900	\$299,900	+ 4.5%	\$283,000	\$298,000	+ 5.3%
Avg. Sales Price		\$294,394	\$309,021	+ 5.0%	\$294,335	\$306,705	+ 4.2%
Pct. of List Price Received		98.5%	98.4%	- 0.1%	98.8%	98.5%	- 0.3%
Affordability Index		123	126	+ 2.4%	125	126	+ 0.8%
Homes for Sale		2,009	2,198	+ 9.4%	--	--	--
Months Supply		3.1	3.6	+ 16.1%	--	--	--