Monthly Indicators

September 2025

U.S. existing-home sales were virtually unchanged from the previous month, dipping just 0.2% to a seasonally adjusted annual rate of 4.0 million units, according to the National Association of REALTORS® (NAR). Most of these transactions went under contract in June and July, when mortgage rates were 40 to 50 basis points higher than current levels. Year-over-year, sales increased 1.8%, with the strongest activity occurring in the Midwest, where the typical home price is 22% below the national median.

- Single Family - Existing Homes Closed Sales were down 3.8 percent to 409.
- Single Family - New Construction Closed Sales were down 6.7 percent to 125.
- Townhouse/Condo Closed Sales were down 3.4 percent to 28.

- Single Family - Existing Homes Median Sales Price increased 0.7 percent to $268,000.
- Single Family - New Construction Median Sales Price decreased 0.9 percent to $346,473.
- Townhouse/Condo Median Sales Price increased 2.0 percent to $186,750.

Nationally, housing inventory declined for the first time this year, slipping 1.3% month-over-month to 1.53 million units, representing a 4.6-month supply at the current sales pace, according to NAR. Despite the monthly drop, total inventory remained 11.7% higher than the same time last year. Meanwhile, the median existing-home price rose 2% year-over-year to $422,600, though it was essentially flat compared to the prior month.

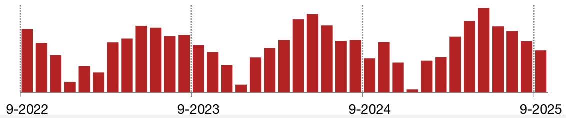
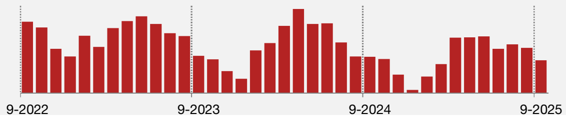
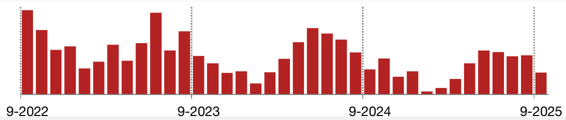
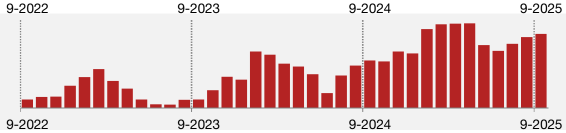
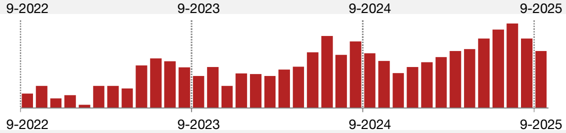
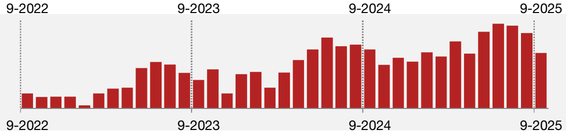
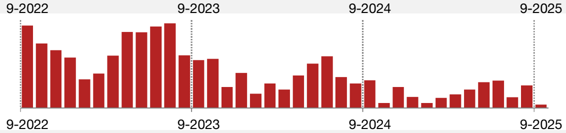
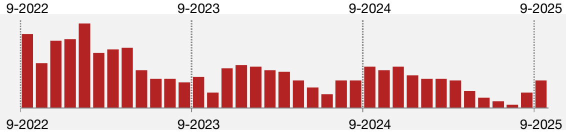
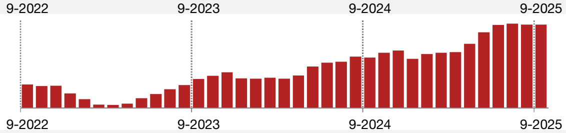
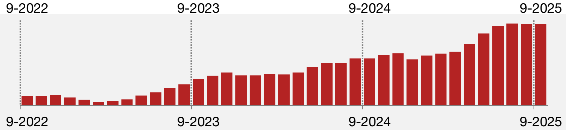
Quick Facts

- 4.4%	+ 1.8%	+ 15.7%
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.

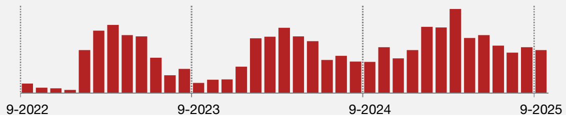
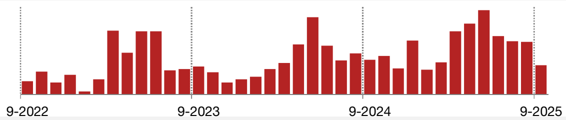
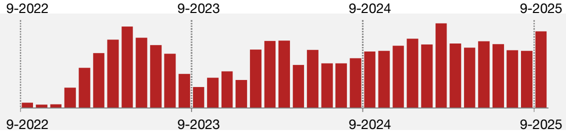
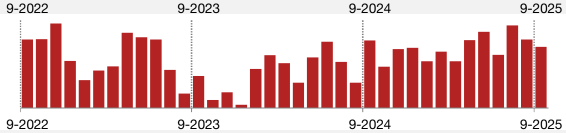
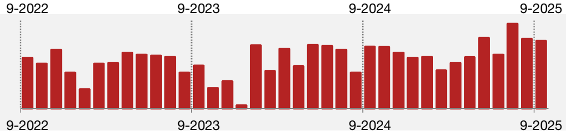
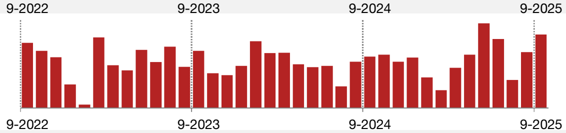
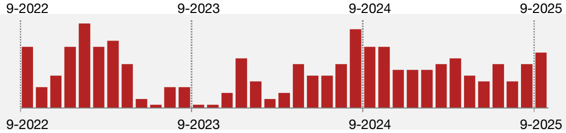
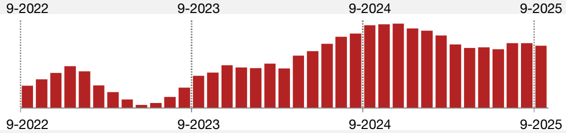
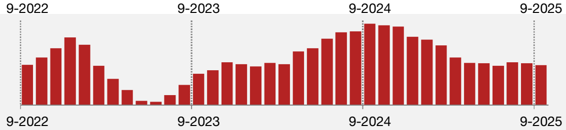
Single Family - Existing Market Overview

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	9-2024	9-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		556	**600**	+ 7.9%	5,985	**6,047**	+ 1.0%
Pending Sales		440	**426**	- 3.2%	4,664	**4,183**	- 10.3%
Closed Sales		425	**409**	- 3.8%	4,522	**3,901**	- 13.7%
Days on Market		32	**42**	+ 31.3%	29	**41**	+ 41.4%
Median Sales Price		$266,250	**$268,000**	+ 0.7%	$261,900	**$275,000**	+ 5.0%
Avg. Sales Price		$287,060	**$283,976**	- 1.1%	$281,661	**$294,919**	+ 4.7%
Pct. of List Price Received		98.6%	**97.8%**	- 0.8%	98.7%	**98.2%**	- 0.5%
Affordability Index		143	**135**	- 5.6%	145	**131**	- 9.7%
Homes for Sale		1,059	**1,452**	+ 37.1%	--	**--**	--
Months Supply		2.2	**3.4**	+ 54.5%	--	**--**	--

Single Family - New Construction Market Overview

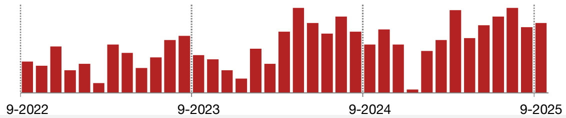
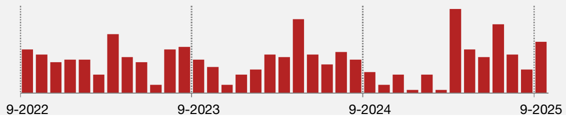
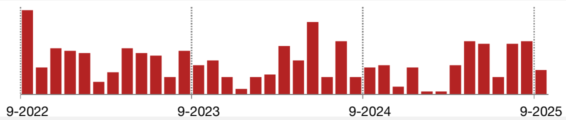
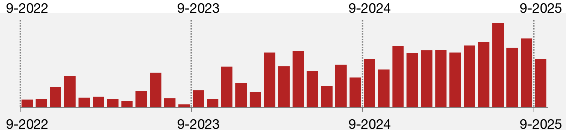
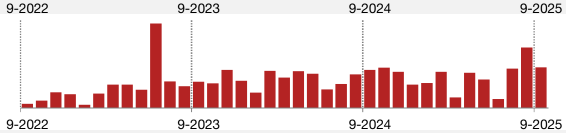
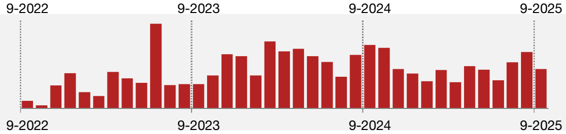
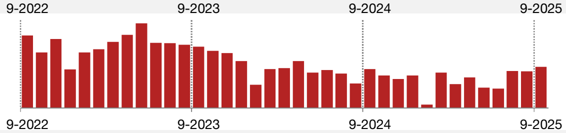
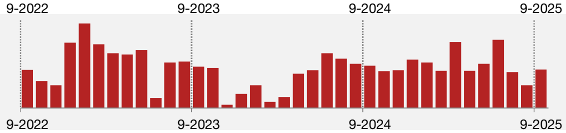
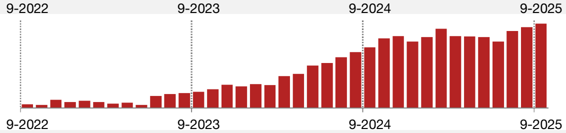
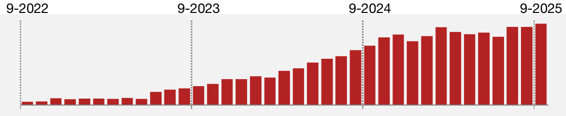
Key metrics for **Single Family - New Construction Properties Only** for the report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparklines	9-2024	9-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		189	**159**	- 15.9%	1,918	**1,908**	- 0.5%
Pending Sales		118	**141**	+ 19.5%	1,326	**1,493**	+ 12.6%
Closed Sales		134	**125**	- 6.7%	1,281	**1,451**	+ 13.3%
Days on Market		94	**115**	+ 22.3%	91	**103**	+ 13.2%
Median Sales Price		$349,475	**$346,473**	- 0.9%	$339,900	**$349,000**	+ 2.7%
Avg. Sales Price		$364,257	**$367,614**	+ 0.9%	$359,799	**$363,026**	+ 0.9%
Pct. of List Price Received		99.9%	**100.2%**	+ 0.3%	99.9%	**100.0%**	+ 0.1%
Affordability Index		83	**82**	- 1.2%	85	**82**	- 3.5%
Homes for Sale		836	**720**	- 13.9%	--	**--**	--
Months Supply		6.3	**4.6**	- 27.0%	--	**--**	--

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.

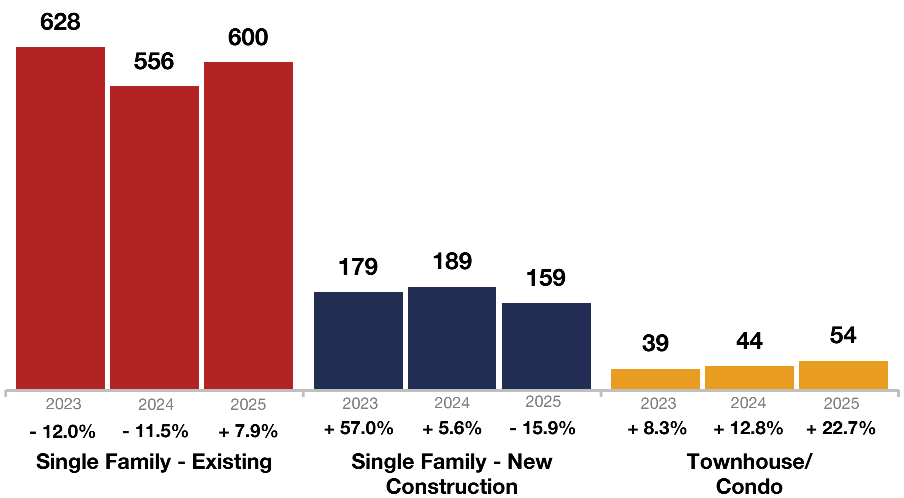
Longleaf Pine REALTORS®
Serving REALTORS in Eastern North Carolina since 1946

Key Metrics	Historical Sparklines	9-2024	9-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		44	**54**	+ 22.7%	442	**471**	+ 6.6%
Pending Sales		26	**38**	+ 46.2%	292	**305**	+ 4.5%
Closed Sales		29	**28**	- 3.4%	288	**279**	- 3.1%
Days on Market		49	**49**	0.0%	41	**62**	+ 51.2%
Median Sales Price		$183,000	**$186,750**	+ 2.0%	$170,500	**$170,000**	- 0.3%
Avg. Sales Price		$223,467	**$190,484**	- 14.8%	$206,807	**$190,980**	- 7.7%
Pct. of List Price Received		98.1%	**98.3%**	+ 0.2%	97.8%	**97.1%**	- 0.7%
Affordability Index		220	**212**	- 3.6%	236	**232**	- 1.7%
Homes for Sale		134	**176**	+ 31.3%	--	**--**	--
Months Supply		4.4	**5.9**	+ 34.1%	--	**--**	--

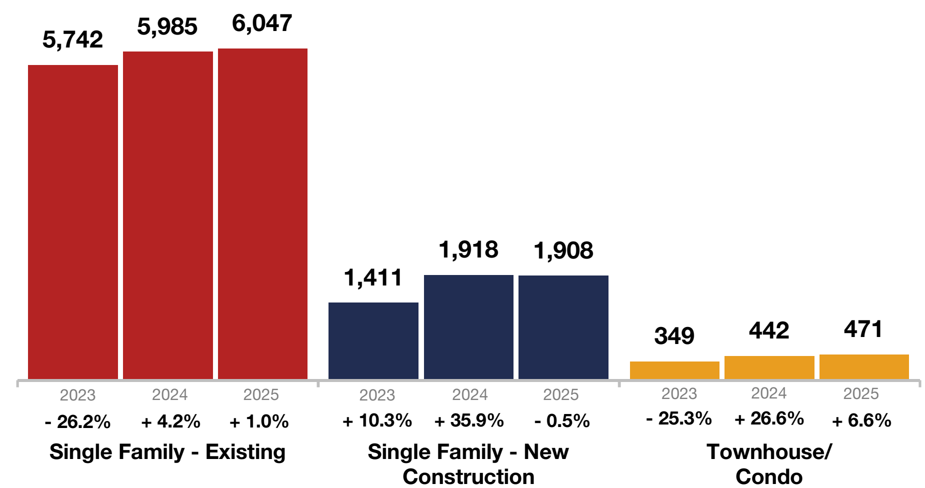
New Listings

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

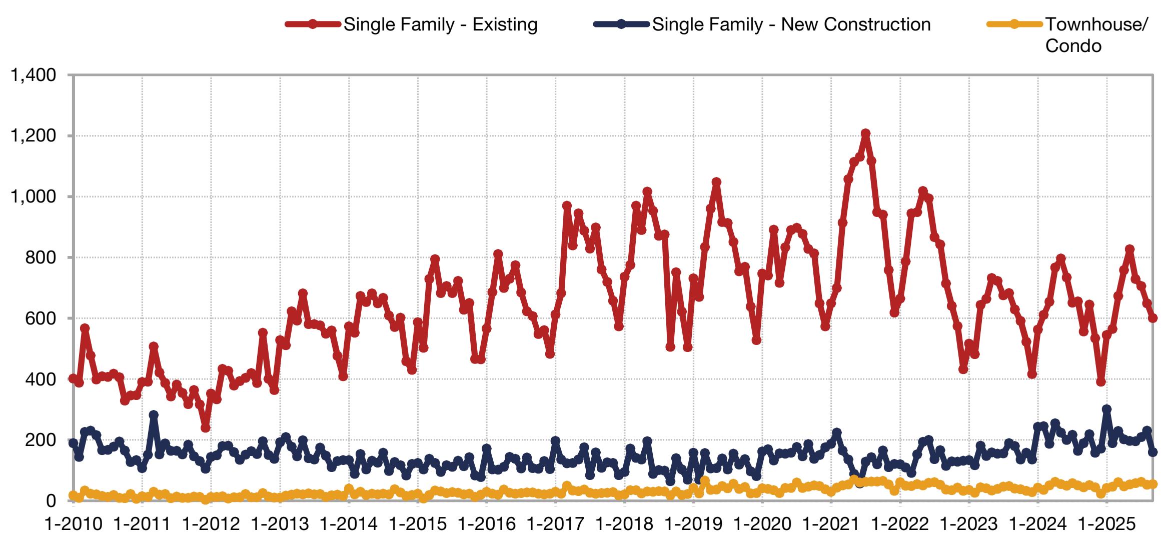
September



Year to Date



Historical New Listings by Month



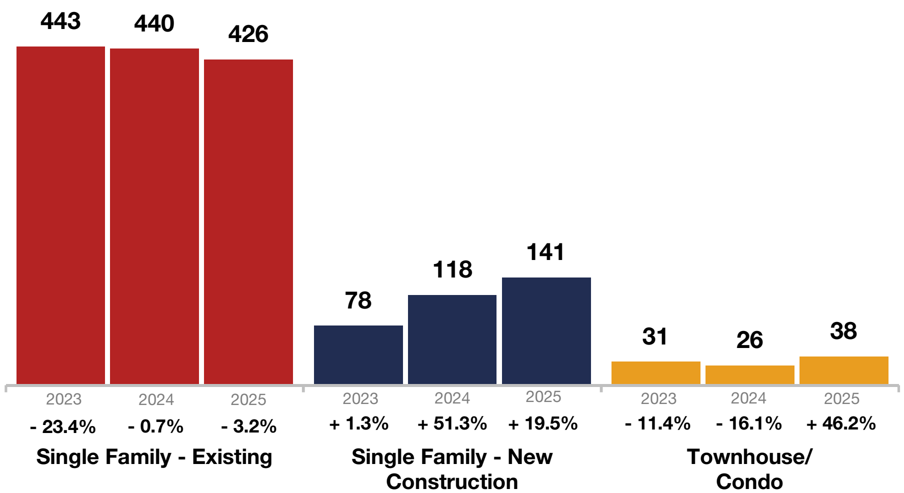
Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

	Single Family - Existing	Single Family - New Construction	Townhouse/ Condo
October 2024	644	218	51
November 2024	534	157	44
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	**600**	**159**	**54**
12-Month Avg.	635	205	49

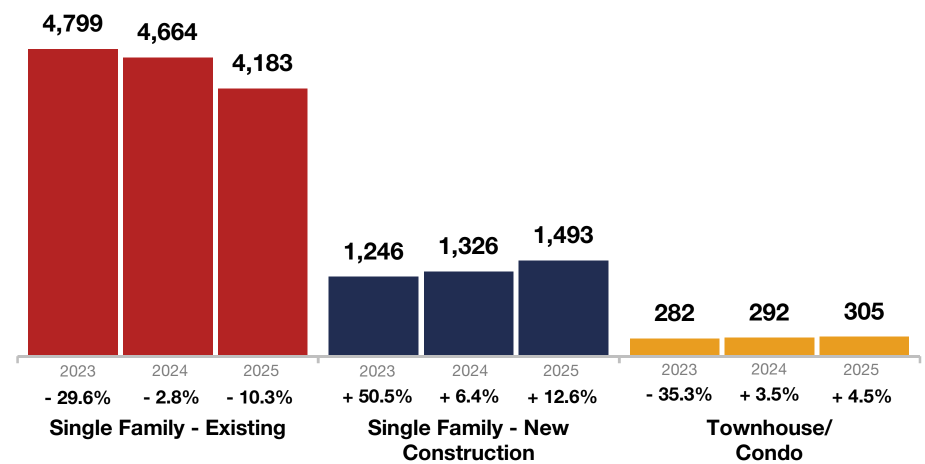
Pending Sales

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

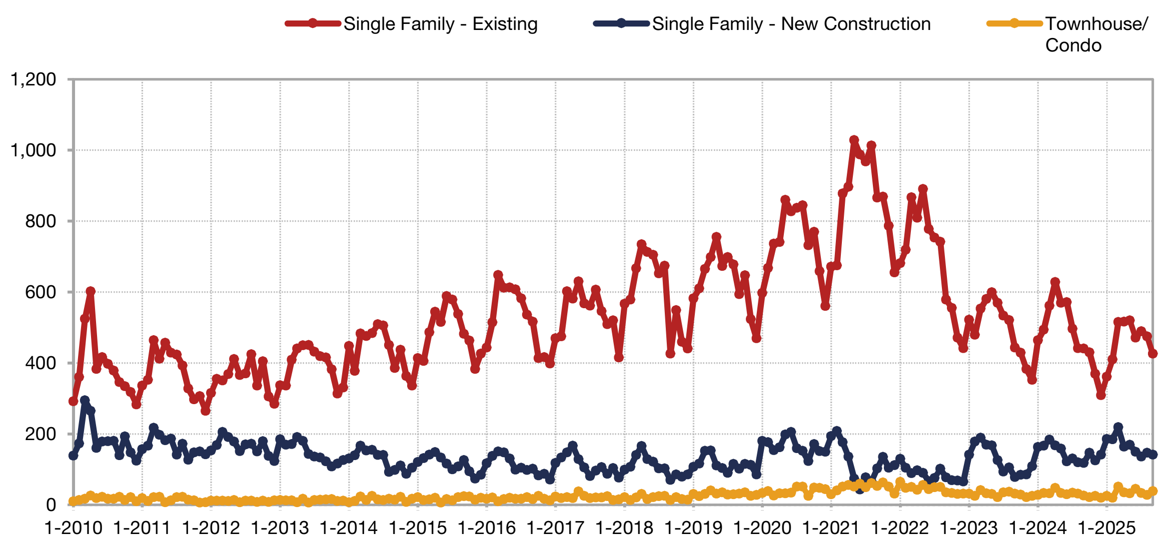
September



Year to Date



Historical Pending Sales by Month



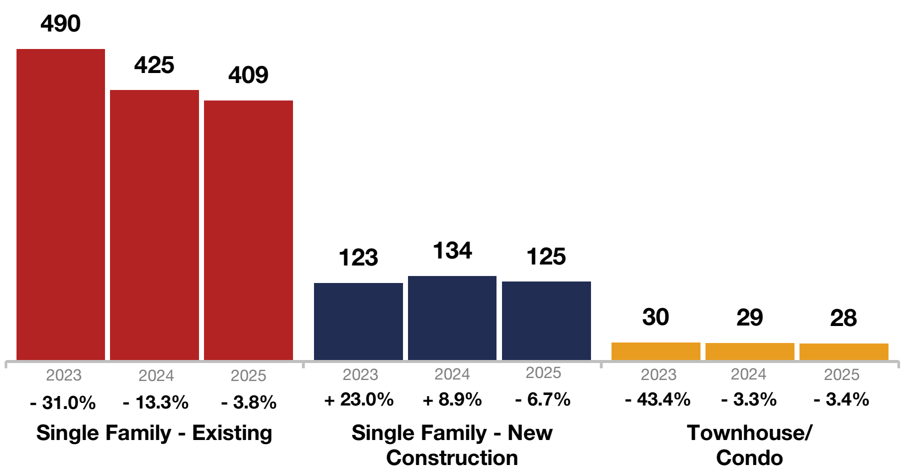
Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

	Single Family - Existing	Single Family - New Construction	Townhouse/ Condo
October 2024	430	146	21
November 2024	369	125	25
December 2024	309	141	19
January 2025	361	185	25
February 2025	410	184	19
March 2025	515	219	51
April 2025	516	164	35
May 2025	520	169	32
June 2025	471	149	45
July 2025	489	136	33
August 2025	475	146	27
September 2025	**426**	**141**	**38**
12-Month Avg.	441	159	31

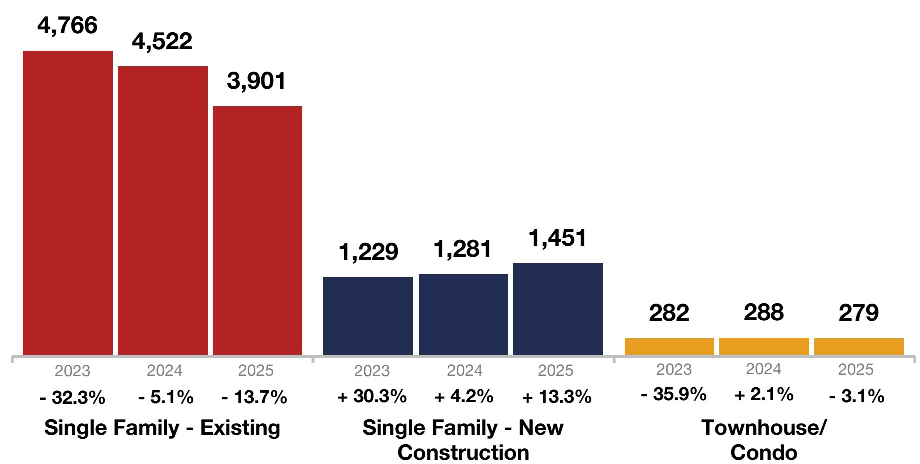
Closed Sales

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

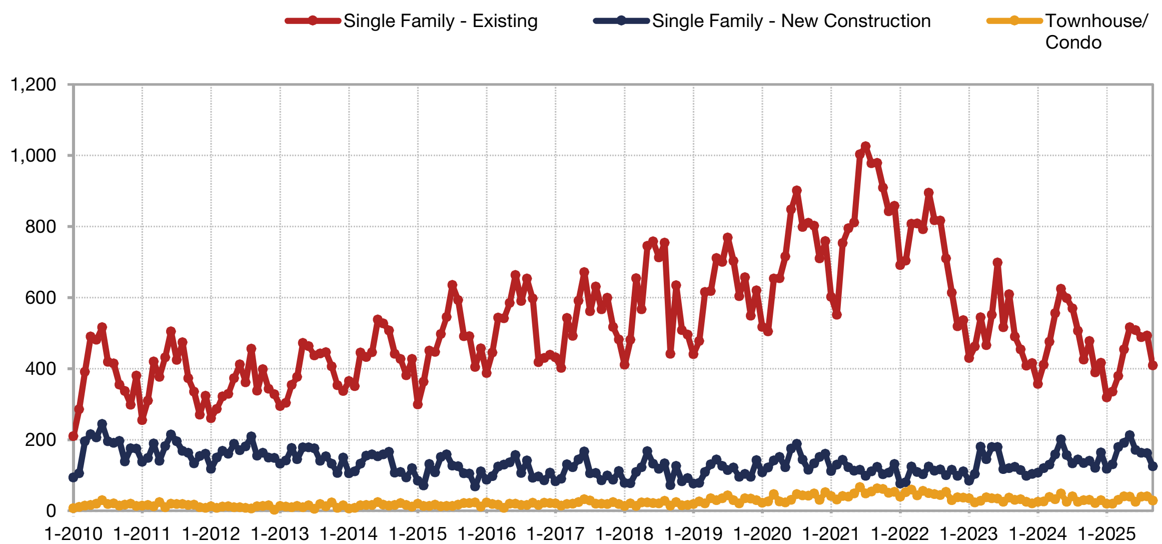
September



Year to Date



Historical Closed Sales by Month



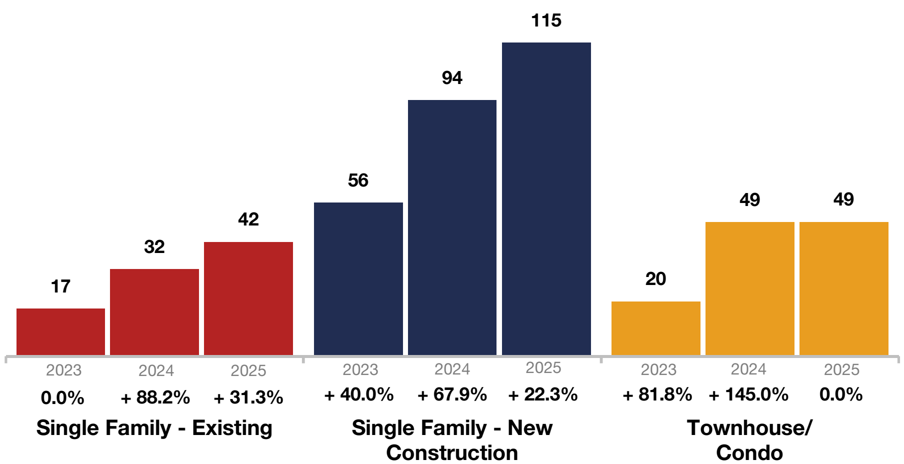
Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

	Single Family - Existing	Single Family - New Construction	Townhouse/ Condo
October 2024	477	140	30
November 2024	389	120	21
December 2024	416	164	29
January 2025	319	118	19
February 2025	335	130	19
March 2025	379	179	30
April 2025	454	191	40
May 2025	516	212	39
June 2025	508	171	25
July 2025	488	163	39
August 2025	493	162	40
September 2025	**409**	**125**	**28**
12-Month Avg.	432	156	30

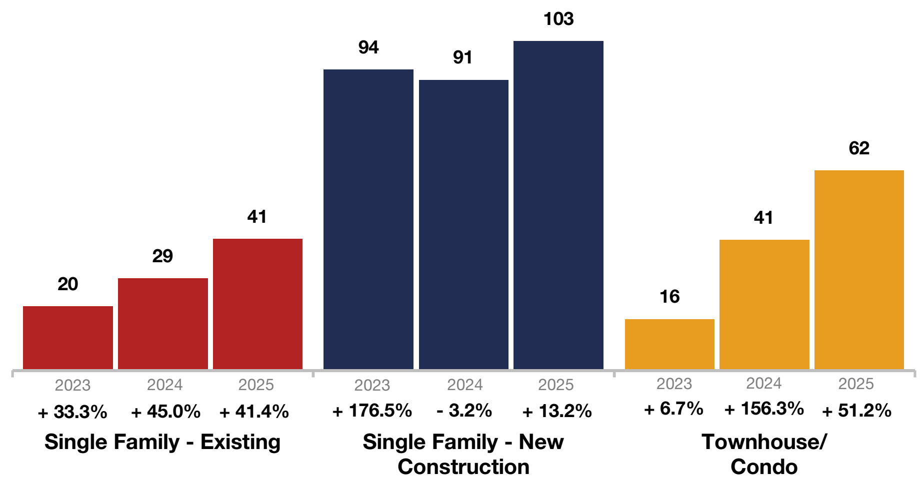
Days on Market Until Sale

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

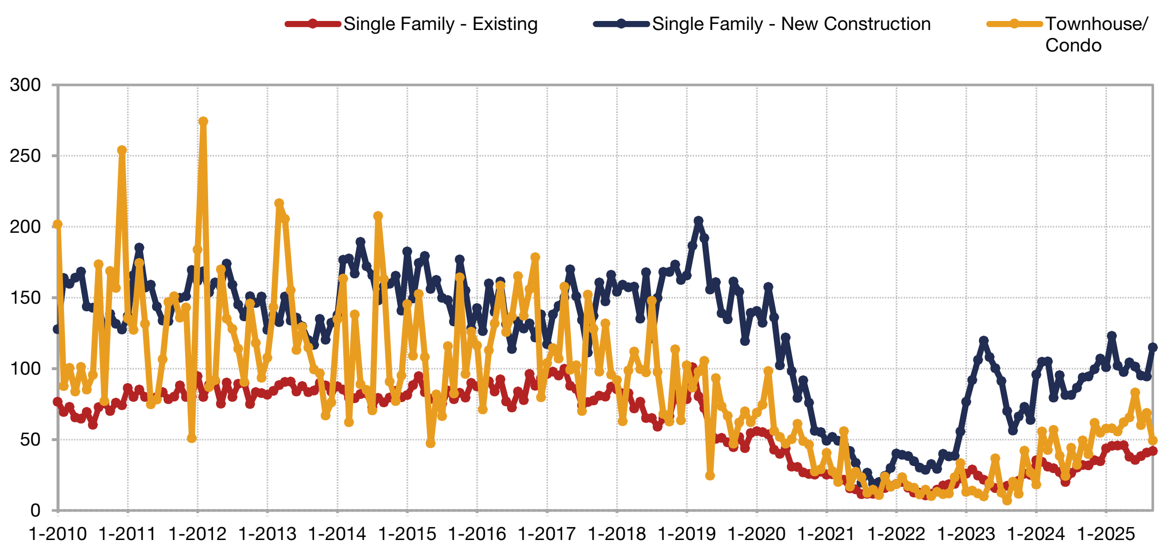
September



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.

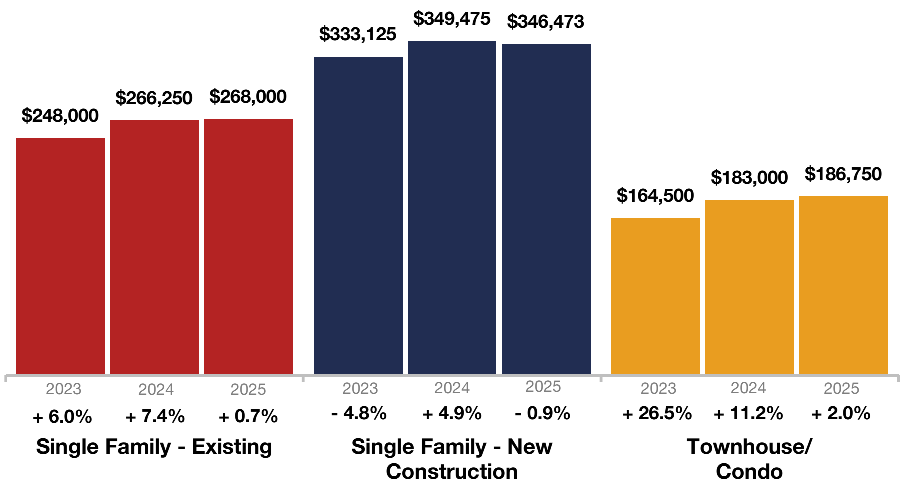
	Single Family - Existing	Single Family - New Construction	Townhouse/ Condo
October 2024	32	94	40
November 2024	35	100	62
December 2024	35	107	55
January 2025	44	101	58
February 2025	45	123	58
March 2025	46	102	56
April 2025	46	97	62
May 2025	38	104	65
June 2025	36	101	83
July 2025	38	95	60
August 2025	41	94	69
September 2025	**42**	**115**	**49**
12-Month Avg.*	39	102	60

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

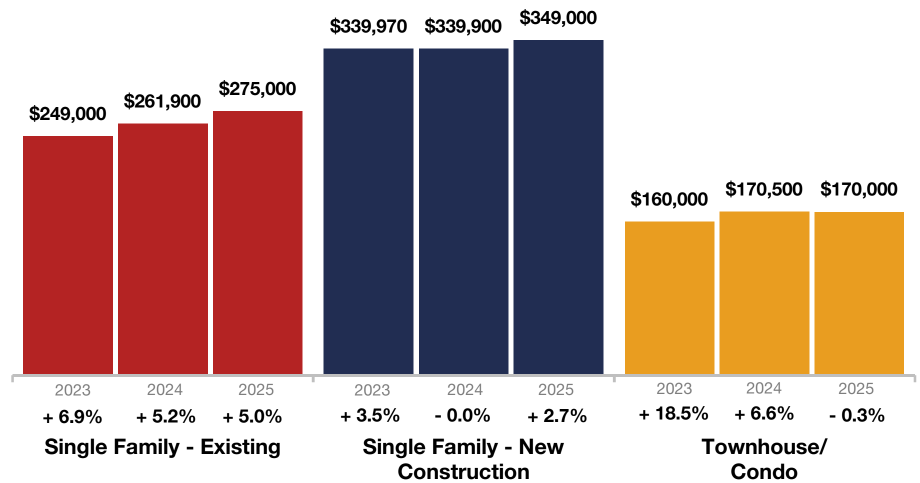
Median Sales Price

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

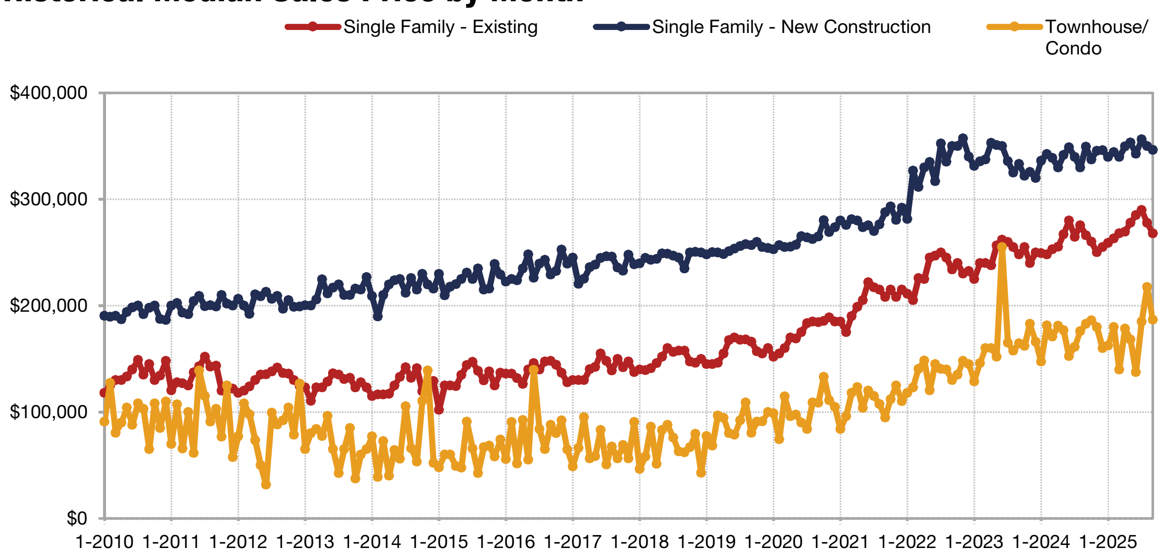
September



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.

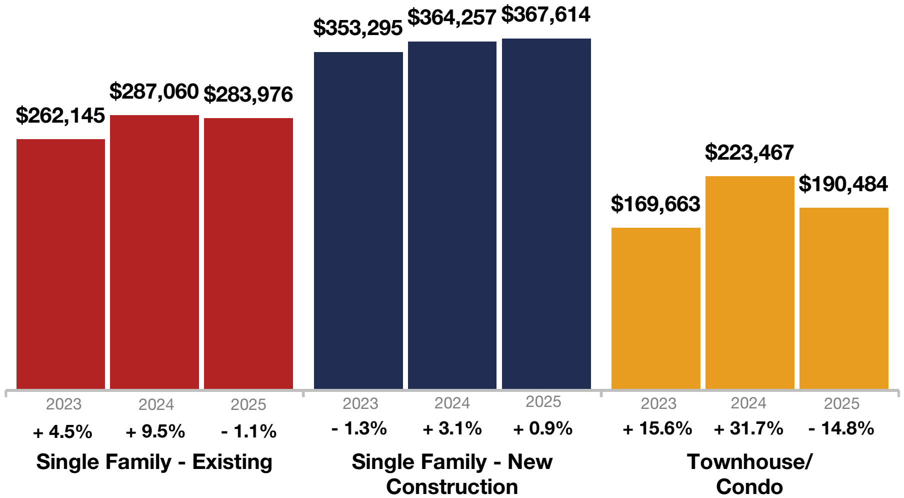
	Single Family - Existing	Single Family - New Construction	Townhouse/ Condo
October 2024	$260,000	$337,414	$186,250
November 2024	$250,250	$345,550	$180,000
December 2024	$255,000	$346,025	$160,000
January 2025	$259,000	$339,900	$162,500
February 2025	$263,000	$344,270	$180,000
March 2025	$268,000	$339,900	$140,000
April 2025	$269,500	$349,595	$178,500
May 2025	$278,000	$353,400	$168,000
June 2025	$285,000	$342,900	$137,500
July 2025	$289,900	$356,400	$185,000
August 2025	$278,000	$349,950	$217,500
September 2025	**$268,000**	**$346,473**	**$186,750**
12-Month Med.*	$270,000	$347,900	$173,000

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

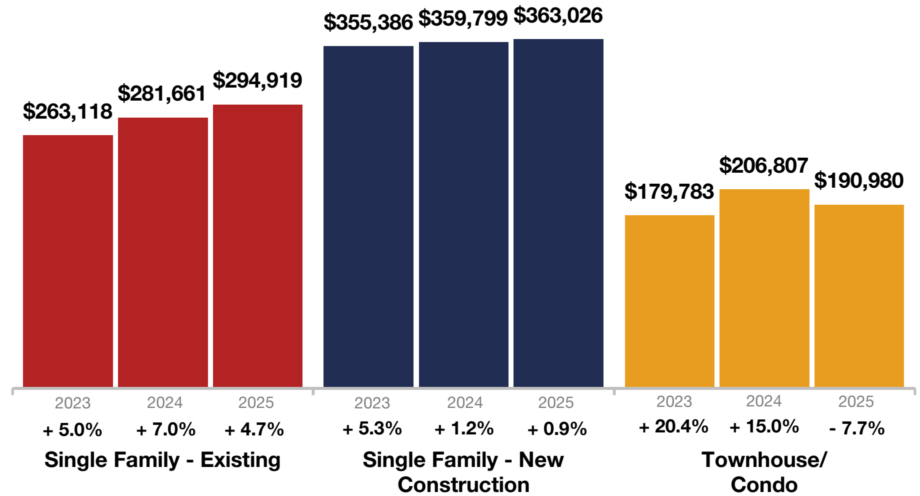
Average Sales Price

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

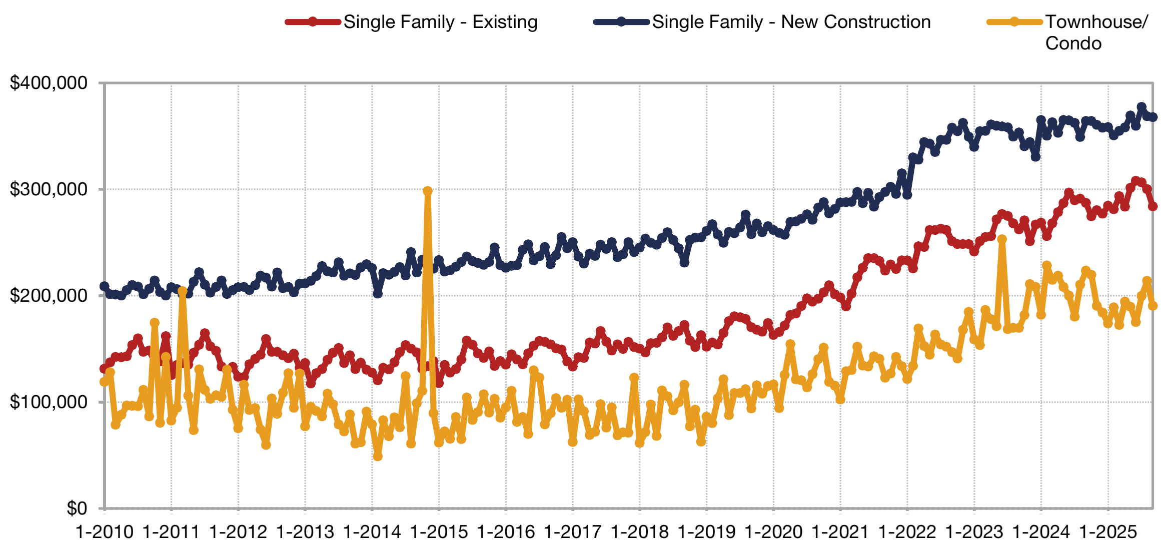
September



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.

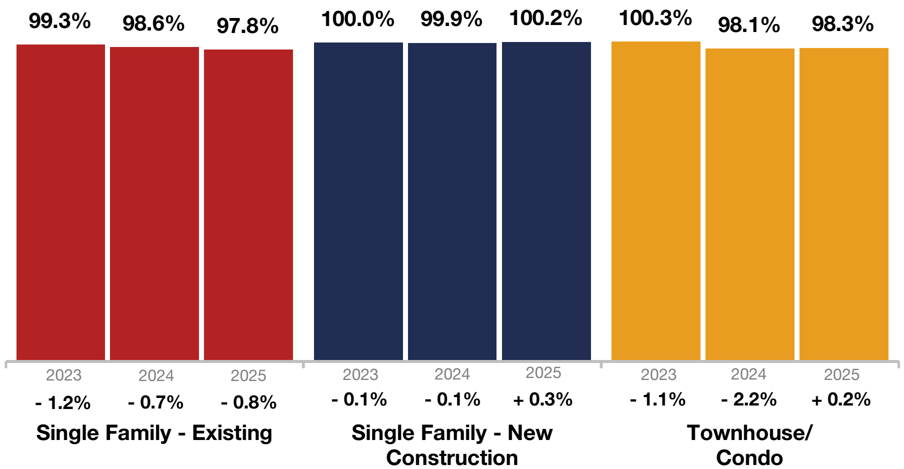
	Single Family - Existing	Single Family - New Construction	Townhouse/ Condo
October 2024	$274,441	$364,089	$219,547
November 2024	$280,120	$360,636	$190,441
December 2024	$277,077	$357,818	$184,138
January 2025	$284,590	$358,265	$173,797
February 2025	$281,140	$350,626	$189,011
March 2025	$293,408	$354,834	$172,477
April 2025	$283,598	$358,193	$194,340
May 2025	$301,416	$369,300	$189,474
June 2025	$307,886	$359,654	$175,132
July 2025	$306,377	$377,307	$199,708
August 2025	$300,214	$368,664	$213,805
September 2025	**$283,976**	**$367,614**	**$190,484**
12-Month Avg.*	$290,489	$362,496	$192,783

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

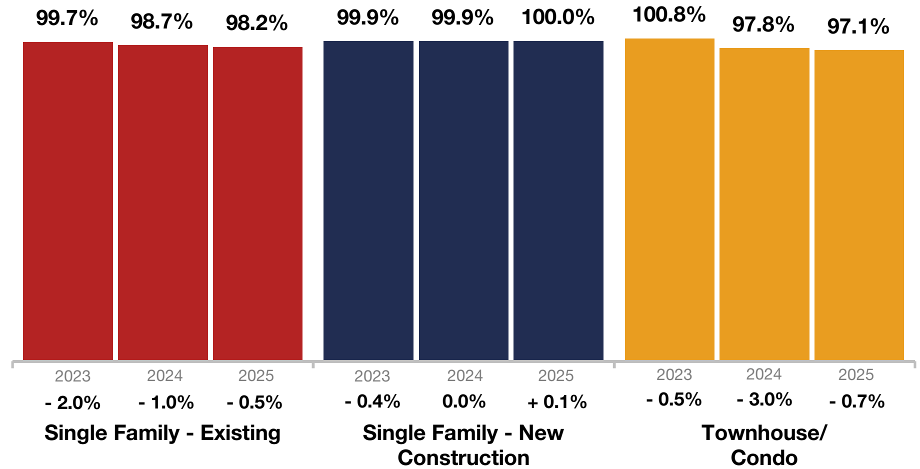
Percent of List Price Received

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.

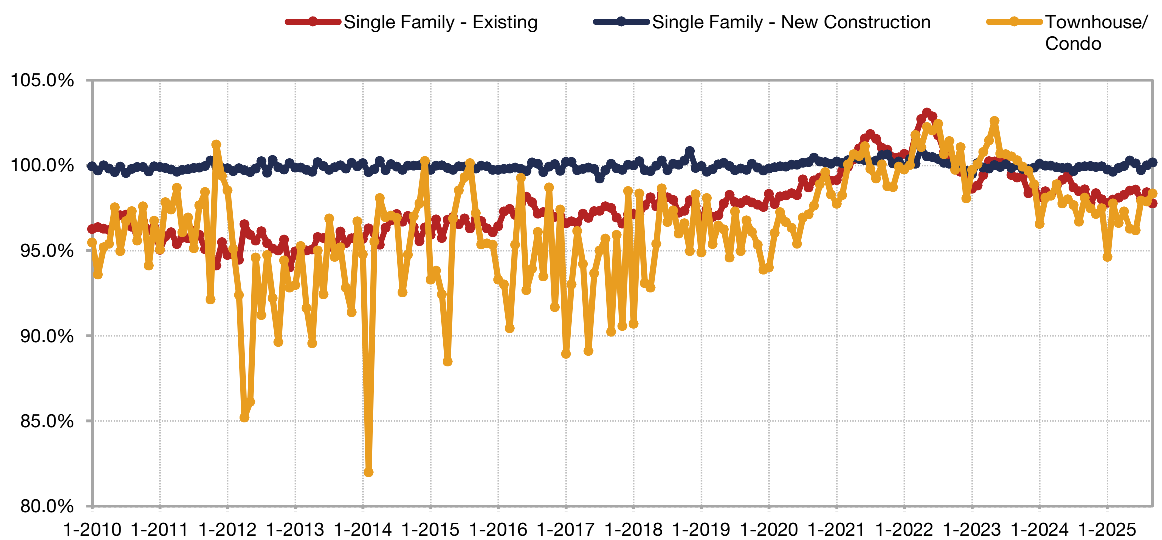
September



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.

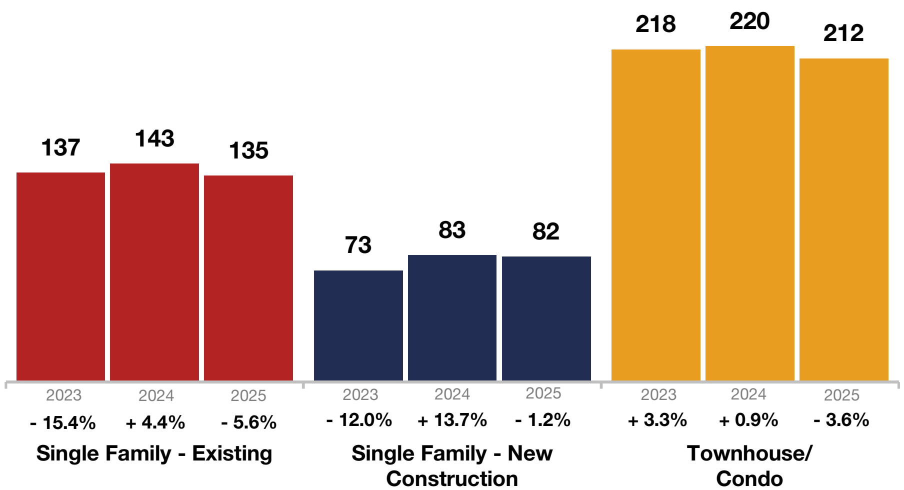
	Single Family - Existing	Single Family - New Construction	Townhouse/ Condo
October 2024	97.8%	100.0%	97.5%
November 2024	98.4%	99.9%	97.1%
December 2024	98.0%	99.9%	97.5%
January 2025	97.8%	99.7%	94.6%
February 2025	98.0%	99.6%	97.8%
March 2025	98.1%	99.8%	96.6%
April 2025	98.3%	100.0%	97.3%
May 2025	98.5%	100.3%	96.3%
June 2025	98.6%	100.1%	96.2%
July 2025	98.0%	99.7%	97.9%
August 2025	98.4%	100.0%	97.9%
September 2025	**97.8%**	**100.2%**	**98.3%**
12-Month Avg.*	98.2%	100.0%	97.2%

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

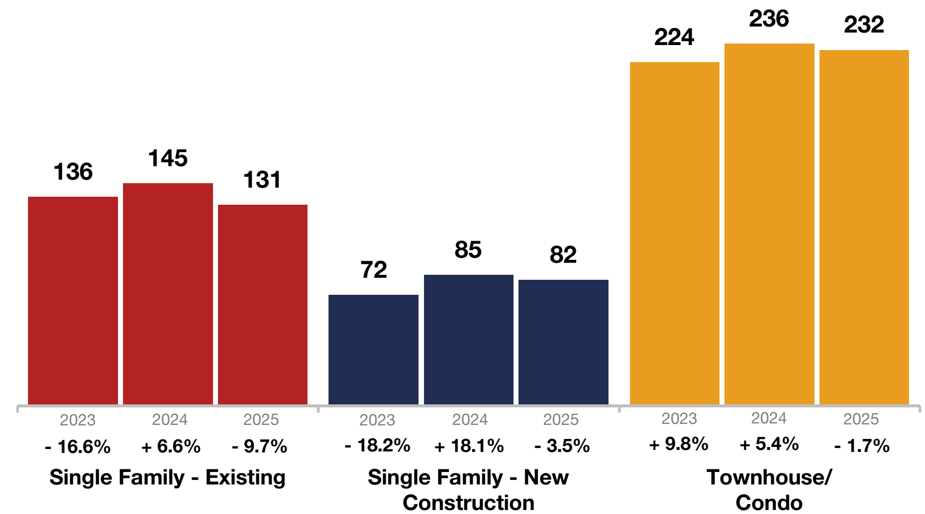
Housing Affordability Index

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.

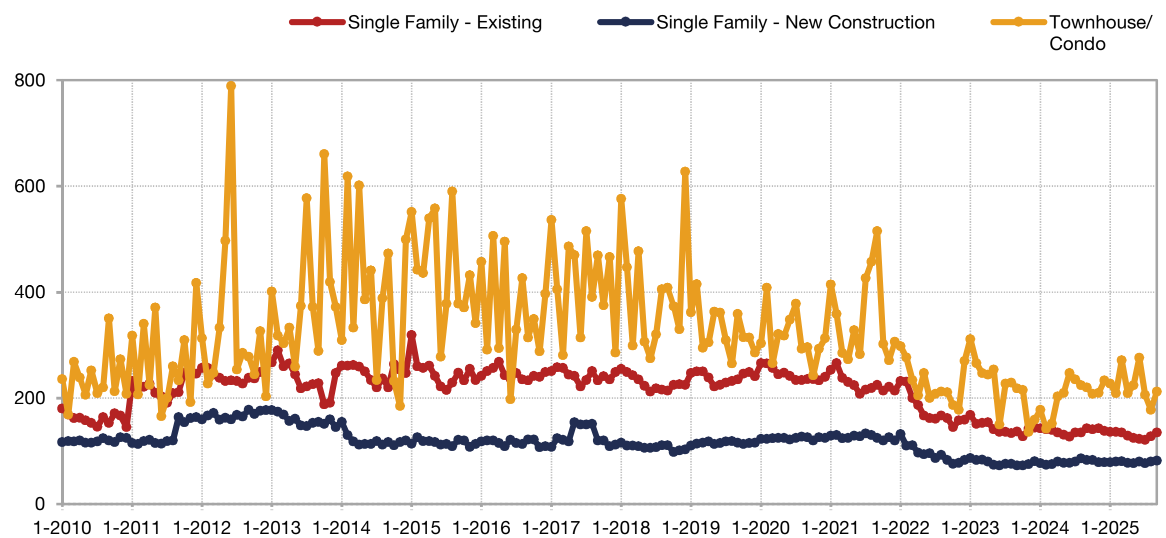
September



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.

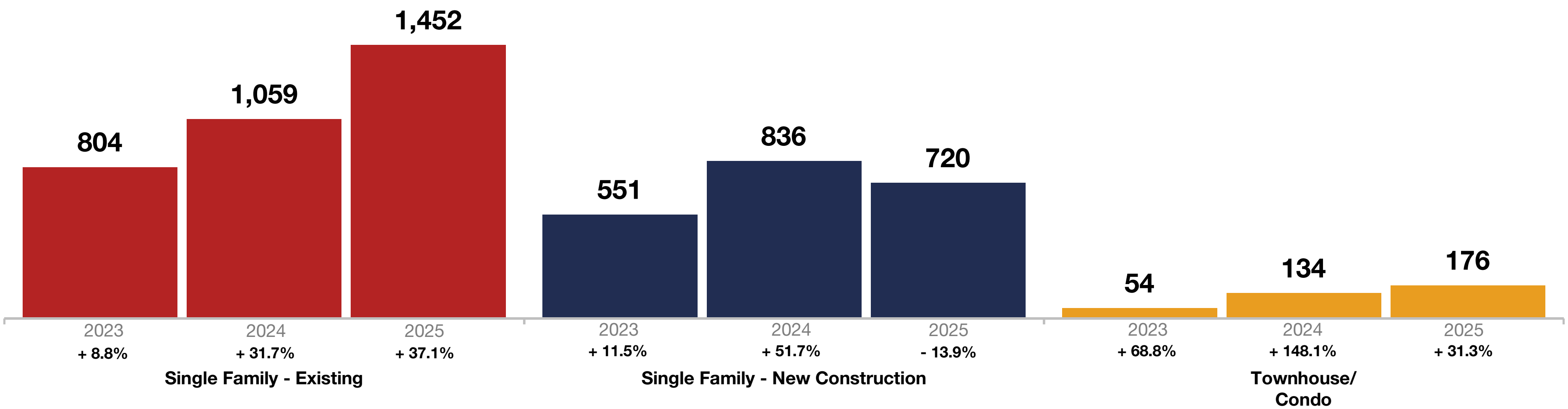
	Single Family - Existing	Single Family - New Construction	Townhouse/ Condo
October 2024	141	83	208
November 2024	143	79	210
December 2024	138	79	233
January 2025	136	79	227
February 2025	136	80	209
March 2025	135	81	271
April 2025	129	78	209
May 2025	125	77	224
June 2025	123	80	276
July 2025	121	77	206
August 2025	128	80	178
September 2025	**135**	**82**	**212**
12-Month Avg.*	133	80	222

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

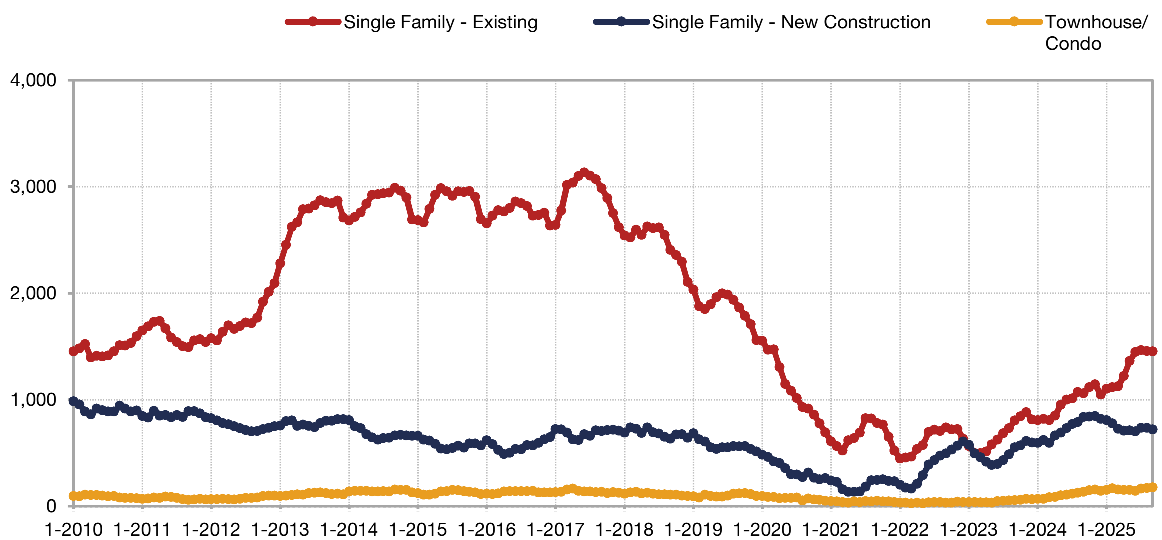
Inventory of Homes for Sale

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

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 2024	1,117	841	150
November 2024	1,144	845	154
December 2024	1,046	818	144
January 2025	1,101	806	152
February 2025	1,117	778	167
March 2025	1,125	727	154
April 2025	1,223	708	153
May 2025	1,363	711	152
June 2025	1,448	701	144
July 2025	1,464	734	163
August 2025	1,455	734	170
September 2025	**1,452**	**720**	**176**
12-Month Avg.	1,255	760	157

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.

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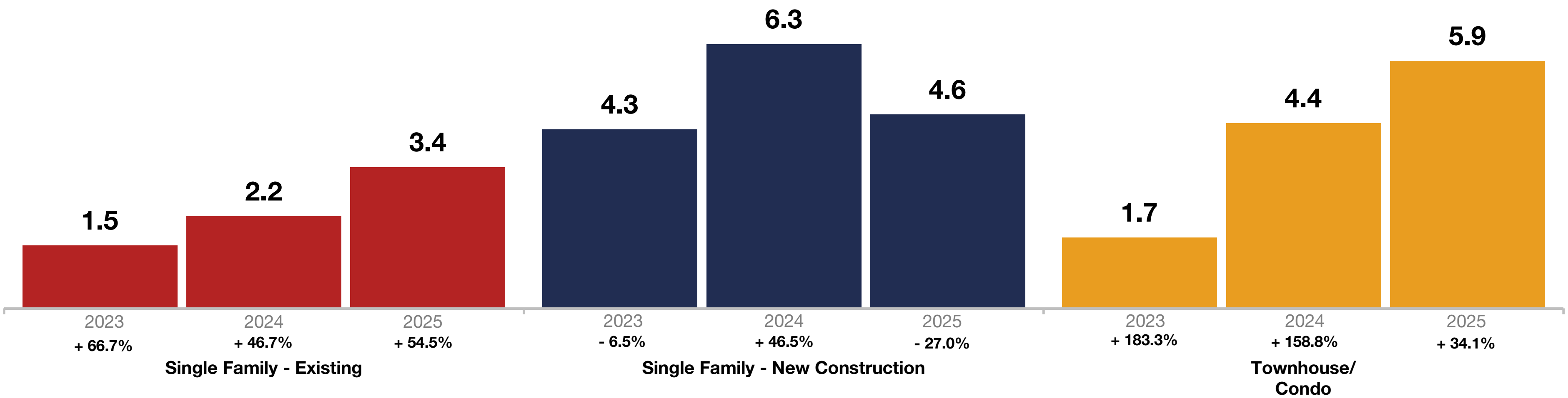
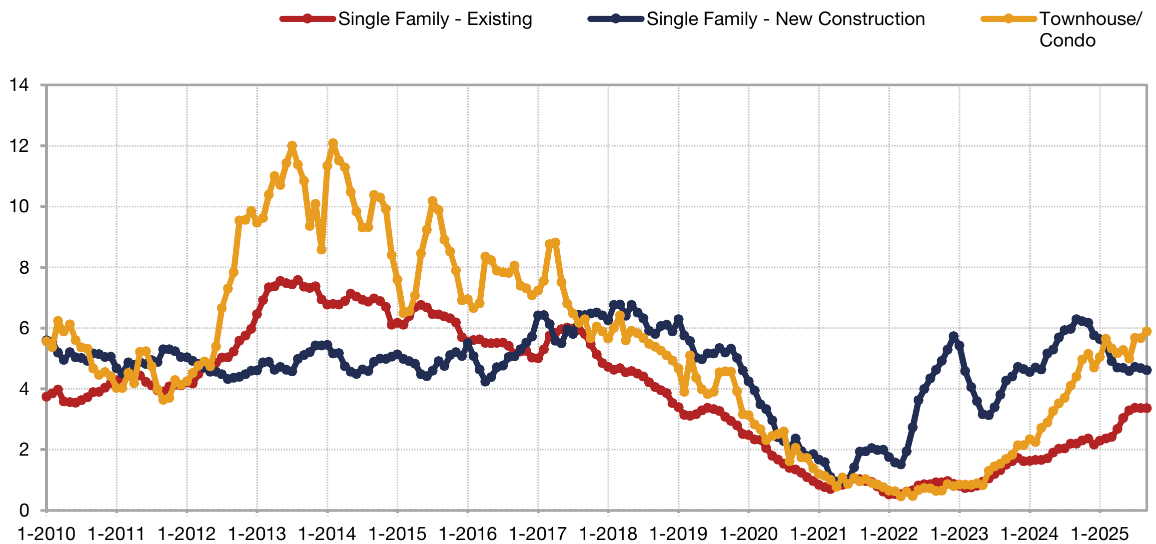
September



Historical Months Supply of Inventory by Month



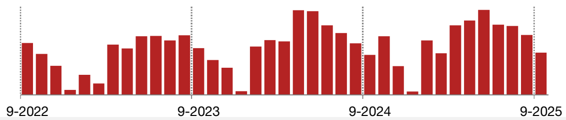
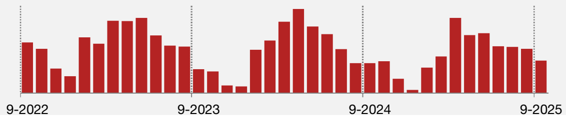
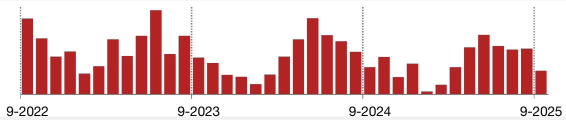
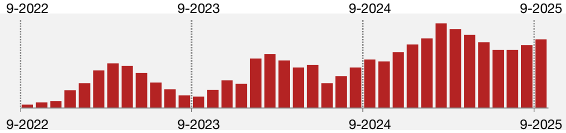
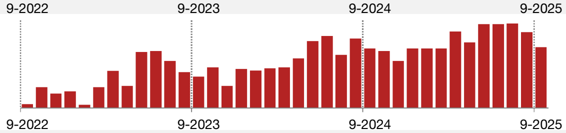
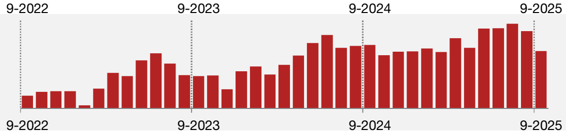
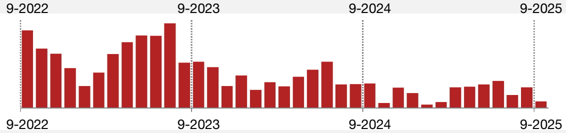
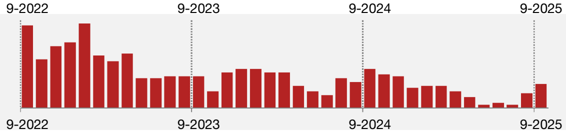
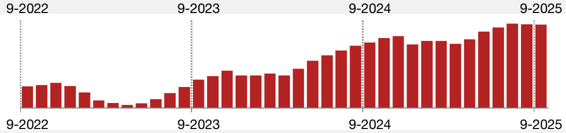
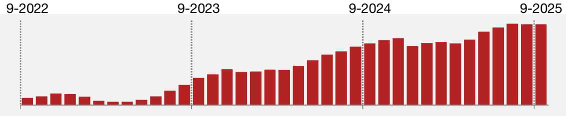
Note: If no activity occurred during a month, no data point is shown and the line extends to the next available data point.

	Single Family - Existing	Single Family - New Construction	Townhouse/ Condo
October 2024	2.3	6.2	5.0
November 2024	2.4	6.2	5.1
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	5.3
June 2025	3.3	4.6	5.0
July 2025	3.4	4.7	5.7
August 2025	3.4	4.7	5.7
September 2025	**3.4**	**4.6**	**5.9**
12-Month Avg.*	2.7	5.2	5.3

* Months Supply for all properties from October 2024 through September 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	9-2024	9-2025	Percent Change	YTD 2024	YTD 2025	Percent Change
New Listings		789	**813**	+ 3.0%	8,345	**8,426**	+ 1.0%
Pending Sales		584	**605**	+ 3.6%	6,282	**5,981**	- 4.8%
Closed Sales		588	**562**	- 4.4%	6,091	**5,631**	- 7.6%
Days on Market		47	**58**	+ 23.4%	42	**58**	+ 38.1%
Median Sales Price		$285,000	**$290,000**	+ 1.8%	$283,250	**$298,000**	+ 5.2%
Avg. Sales Price		$301,541	**$297,821**	- 1.2%	$294,617	**$307,309**	+ 4.3%
Pct. of List Price Received		98.9%	**98.3%**	- 0.6%	98.9%	**98.6%**	- 0.3%
Affordability Index		133	**125**	- 6.0%	134	**122**	- 9.0%
Homes for Sale		2,029	**2,348**	+ 15.7%	--	**--**	--
Months Supply		3.1	**3.8**	+ 22.6%	--	**--**	--