



REALTOR® ASSOCIATION of Sarasota and Manatee

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REALTOR® Association of Sarasota and Manatee

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Year-End 2025 Real Estate Market Report: Trends in Sarasota and Manatee Counties

SARASOTA, Fla. (January 16, 2026) – The REALTOR® Association of Sarasota and Manatee (RASM) has released its year-end 2025 real-estate market report, offering a comprehensive look at housing activity in both counties. Throughout 2025 the region experienced contrasting trends between single-family homes and condos/townhouses and between Sarasota and Manatee counties. Understanding these nuances is essential for buyers and sellers navigating today’s evolving market.

December 2025 data continued to emphasize these yearly trends. Sarasota’s single-family market closed the year with 711 sales (up 17.7 percent from December 2024) and a median sale price of \$485,000, while the condo/townhouse sector recorded 295 sales (up 15.2 percent) but saw its median price slide to \$345,000. In Manatee County, December single-family sales slipped to 612 homes (–5.6 percent) with a median price near \$491,500, whereas condo/townhouse sales climbed to 244 units (up 13 percent) as the median price dipped to about \$307,500.

“A lot of headlines consumers read are at the national or state level, and with real estate being hyper-local, those data points don’t give you much true insight into our local markets,” said David Crawford, 2026 RASM President and Broker/Owner of Catalist Realty. “Even in Sarasota and Manatee counties, as you can see from the year-end data, we truly have multiple markets, not only between single-family homes and condo or townhome properties, but also between resale inventory and new construction coming to market.”

Key Trends in Sarasota/Manatee Year-End 2025:

- **Sales Activity:** Sarasota County posted a 9.3 percent increase in single-family home sales (8,183 sales), while its townhouse/condo segment declined 4.3 percent to 3,295 units. Manatee County showed the opposite pattern, with single-family sales up just 0.5 percent (7,521 homes) and condo/townhouse sales up 4.8 percent (2,719 units).
- **Median Sales Price:** Single-family median prices eased to \$474,700 in Sarasota (–6 percent) and \$475,000 in Manatee (–5 percent). Condo prices fell more sharply, dropping 15.3 percent to \$325,000 in Sarasota and 8.6 percent to \$310,000 in Manatee.
- **Inventory:** Sarasota’s single-family inventory fell to 3,211 listings (4.7 months supply) while condo inventory expanded to 2,231 units (8.1 months). Manatee’s single-family inventory increased to 2,687 homes (4.3 months), whereas condo inventory remained stable around 1,480 units (6.5 months).

- **Speed of Sales:** Homes generally took longer to sell compared with 2024. The median time to sale was 99 days for Sarasota single-family homes and 104 days in Manatee. Condos experienced the slowest pace: 112 days to sale in Sarasota and 115 days in Manatee.

Single-Family Homes

Sarasota's single-family home market remained robust in 2025. Closed sales jumped to 8,183 transactions (up 9.3 percent), with 40.8 percent paid in cash. Despite the uptick in sales, the median price slipped 6 percent to \$474,700, and the average price declined 5 percent to \$682,999. Sellers received a median of 93 percent of their original list price. Inventory tightened to 3,211 active listings (4.7 months of supply).

Manatee County saw more modest single-family results. Sales edged up 0.5 percent to 7,521 homes. Prices eased 5 percent to a median of \$475,000 and 5.6 percent to an average of \$635,041. Cash transactions comprised roughly 30.1 percent of sales, while sellers still obtained a median of 94.6 percent of their original asking price. Inventory climbed to 2,687 homes (4.3 months supply).

Townhomes and Condos

Sarasota's condo and townhouse market cooled significantly. Closed sales fell 4.3 percent to 3,295 units. Cash purchases remained high with 64.7 percent of sales. The median price tumbled 15.3 percent to \$325,000, while the average price declined 26.7 percent to \$514,980, signaling a softening luxury condo market in 2025. Sellers accepted a median of 90.5 percent of their original list price. Active inventory expanded to 2,231 units (8.1 months supply).

In Manatee County, the condo/townhouse sector fared better. Closed sales increased 4.8 percent to 2,719 units, with 51.6 percent of sales being in cash. Even so, prices softened: the median sale price fell 8.6 percent to \$310,000 and the average price declined 12 percent to \$347,008. Sellers received a median of 92.6 percent of their original list price. Inventory stayed roughly level at 1,480 units (6.5 months supply).

Summary

The 2025 figures highlight that there is no single narrative for the Sarasota–Manatee housing market. Single-family homes remained resilient, with modest price easing and healthy sales volumes. Condos and townhomes, particularly in Sarasota, faced significant price adjustments and slower sales. These contrasting dynamics illustrate why working with a REALTOR® who understands local nuances is critical. Market conditions vary by county, property type, and even neighborhood, so buyers and sellers need individualized guidance from professionals who can interpret localized trends and help them make confident decisions.

Monthly reports are provided by Florida Realtors® with data compiled from Stellar MLS. For comprehensive statistics dating back to 2015, visit www.MyRASM.com/statistics.

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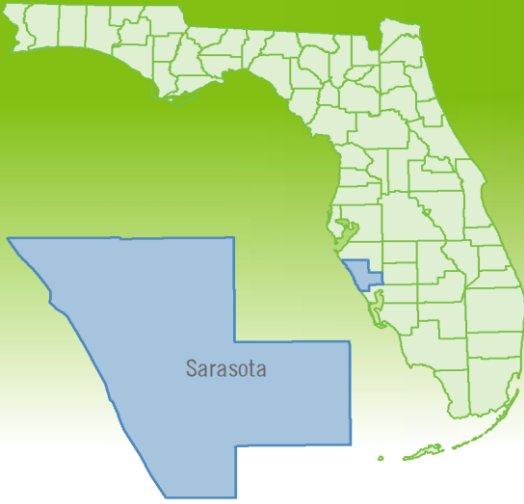
About REALTOR® Association of Sarasota and Manatee

The REALTOR® Association of Sarasota and Manatee (RASM) is the largest real estate trade association in Sarasota and Manatee counties, serving over 9,000 members. RASM provides technology, training, networking, and business support to members, and supports a healthy real estate market by upholding high professional and ethical standards through a Code of Ethics, ongoing education, and certification programs. As the advocate for the real estate brokerage industry, RASM is the Voice for Real Estate® in the Sarasota/Manatee region. For more information, call (941) 952-3400 or visit www.myrasm.com.

Yearly Market Summary - 2025

Single-Family Homes

Sarasota County



	2025	2024	Percent Change Year-over-Year
Closed Sales	8,183	7,486	9.3%
Paid in Cash	3,342	3,243	3.1%
Median Sale Price	\$474,700	\$505,000	-6.0%
Average Sale Price	\$682,999	\$719,290	-5.0%
Dollar Volume	\$5.6 Billion	\$5.4 Billion	3.8%
Med. Pct. of Orig. List Price Received	93.0%	94.4%	-1.5%
Median Time to Contract	57 Days	49 Days	16.3%
Median Time to Sale	99 Days	91 Days	8.8%
New Pending Sales	8,161	7,440	9.7%
New Listings	11,457	11,055	3.6%
Pending Inventory	640	652	-1.8%
Inventory (Active Listings)	3,211	3,404	-5.7%
Months Supply of Inventory	4.7	5.5	-14.5%

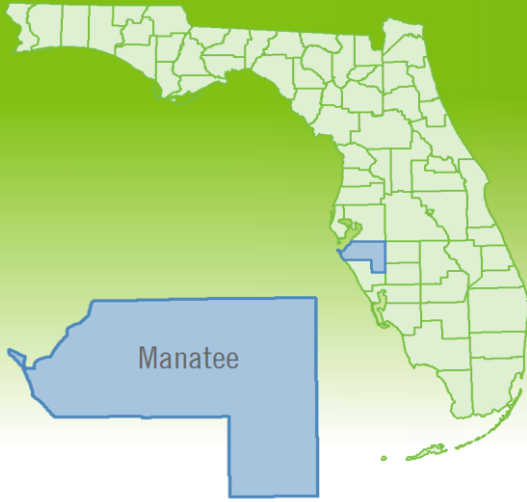


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Yearly Market Summary - 2025

Single-Family Homes

Manatee County



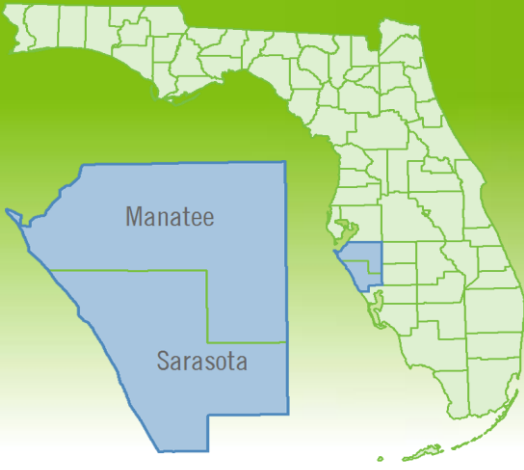
	2025	2024	Percent Change Year-over-Year
Closed Sales	7,521	7,485	0.5%
Paid in Cash	2,263	2,377	-4.8%
Median Sale Price	\$475,000	\$499,875	-5.0%
Average Sale Price	\$635,041	\$672,952	-5.6%
Dollar Volume	\$4.8 Billion	\$5.0 Billion	-5.2%
Med. Pct. of Orig. List Price Received	94.6%	95.6%	-1.0%
Median Time to Contract	58 Days	52 Days	11.5%
Median Time to Sale	104 Days	102 Days	2.0%
New Pending Sales	7,567	7,450	1.6%
New Listings	10,230	9,952	2.8%
Pending Inventory	665	645	3.1%
Inventory (Active Listings)	2,687	2,518	6.7%
Months Supply of Inventory	4.3	4.0	7.5%



Yearly Market Summary - 2025

Single-Family Homes

North Port-Sarasota-Bradenton MSA



	2025	2024	Percent Change Year-over-Year
Closed Sales	15,704	14,971	4.9%
Paid in Cash	5,605	5,620	-0.3%
Median Sale Price	\$475,000	\$500,000	-5.0%
Average Sale Price	\$660,034	\$696,107	-5.2%
Dollar Volume	\$10.4 Billion	\$10.4 Billion	-0.5%
Med. Pct. of Orig. List Price Received	93.8%	95.1%	-1.4%
Median Time to Contract	57 Days	51 Days	11.8%
Median Time to Sale	102 Days	97 Days	5.2%
New Pending Sales	15,728	14,890	5.6%
New Listings	21,687	21,007	3.2%
Pending Inventory	1,305	1,297	0.6%
Inventory (Active Listings)	5,898	5,922	-0.4%
Months Supply of Inventory	4.5	4.7	-4.3%

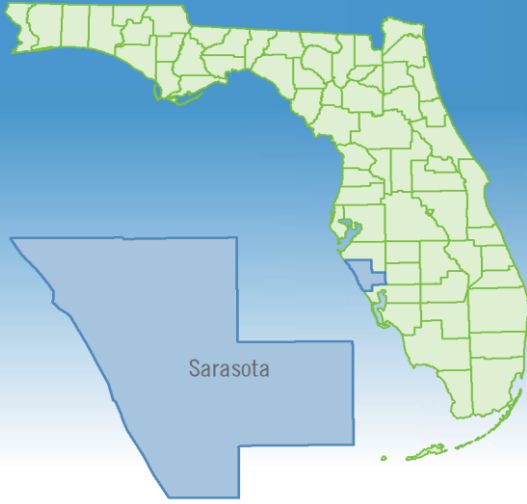


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Yearly Market Summary - 2025

Townhouses and Condos

Sarasota County



	2025	2024	Percent Change Year-over-Year
Closed Sales	3,295	3,444	-4.3%
Paid in Cash	2,133	2,279	-6.4%
Median Sale Price	\$325,000	\$383,500	-15.3%
Average Sale Price	\$514,980	\$703,003	-26.7%
Dollar Volume	\$1.7 Billion	\$2.4 Billion	-29.9%
Med. Pct. of Orig. List Price Received	90.5%	93.3%	-3.0%
Median Time to Contract	71 Days	60 Days	18.3%
Median Time to Sale	112 Days	105 Days	6.7%
New Pending Sales	3,367	3,388	-0.6%
New Listings	5,808	5,634	3.1%
Pending Inventory	461	435	6.0%
Inventory (Active Listings)	2,231	1,987	12.3%
Months Supply of Inventory	8.1	6.9	17.4%



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Yearly Market Summary - 2025

Townhouses and Condos

Manatee County



	2025	2024	Percent Change Year-over-Year
Closed Sales	2,719	2,594	4.8%
Paid in Cash	1,403	1,336	5.0%
Median Sale Price	\$310,000	\$338,990	-8.6%
Average Sale Price	\$347,008	\$394,267	-12.0%
Dollar Volume	\$943.5 Million	\$1.0 Billion	-7.7%
Med. Pct. of Orig. List Price Received	92.6%	93.5%	-1.0%
Median Time to Contract	72 Days	65 Days	10.8%
Median Time to Sale	115 Days	110 Days	4.5%
New Pending Sales	2,760	2,650	4.2%
New Listings	4,286	4,253	0.8%
Pending Inventory	235	248	-5.2%
Inventory (Active Listings)	1,480	1,483	-0.2%
Months Supply of Inventory	6.5	6.9	-5.8%

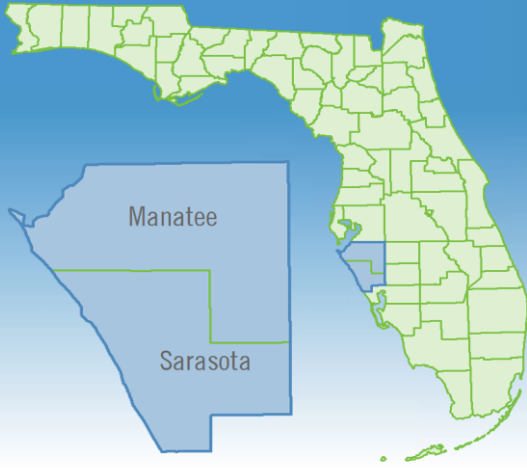


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Yearly Market Summary - 2025

Townhouses and Condos

North Port-Sarasota-Bradenton MSA



	2025	2024	Percent Change Year-over-Year
Closed Sales	6,014	6,038	-0.4%
Paid in Cash	3,536	3,615	-2.2%
Median Sale Price	\$320,000	\$360,000	-11.1%
Average Sale Price	\$438,992	\$570,366	-23.0%
Dollar Volume	\$2.6 Billion	\$3.4 Billion	-23.3%
Med. Pct. of Orig. List Price Received	91.5%	93.4%	-2.0%
Median Time to Contract	72 Days	62 Days	16.1%
Median Time to Sale	113 Days	106 Days	6.6%
New Pending Sales	6,127	6,038	1.5%
New Listings	10,094	9,887	2.1%
Pending Inventory	696	683	1.9%
Inventory (Active Listings)	3,711	3,470	6.9%
Months Supply of Inventory	7.4	6.9	7.2%



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RASM MARKET STATISTICS

EXPANDED REPORTS

Sarasota and Manatee Counties

YEAR-END 2025

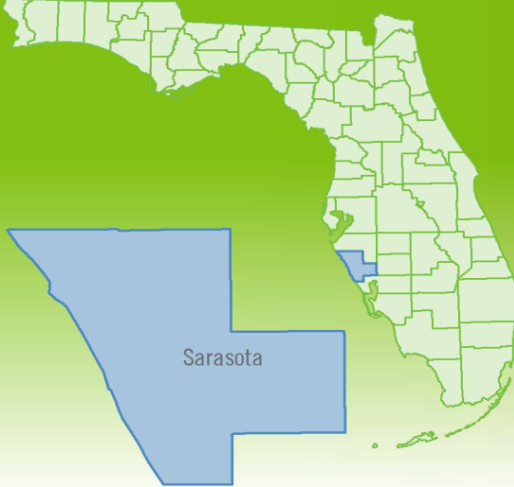
Reach Further With The Market.

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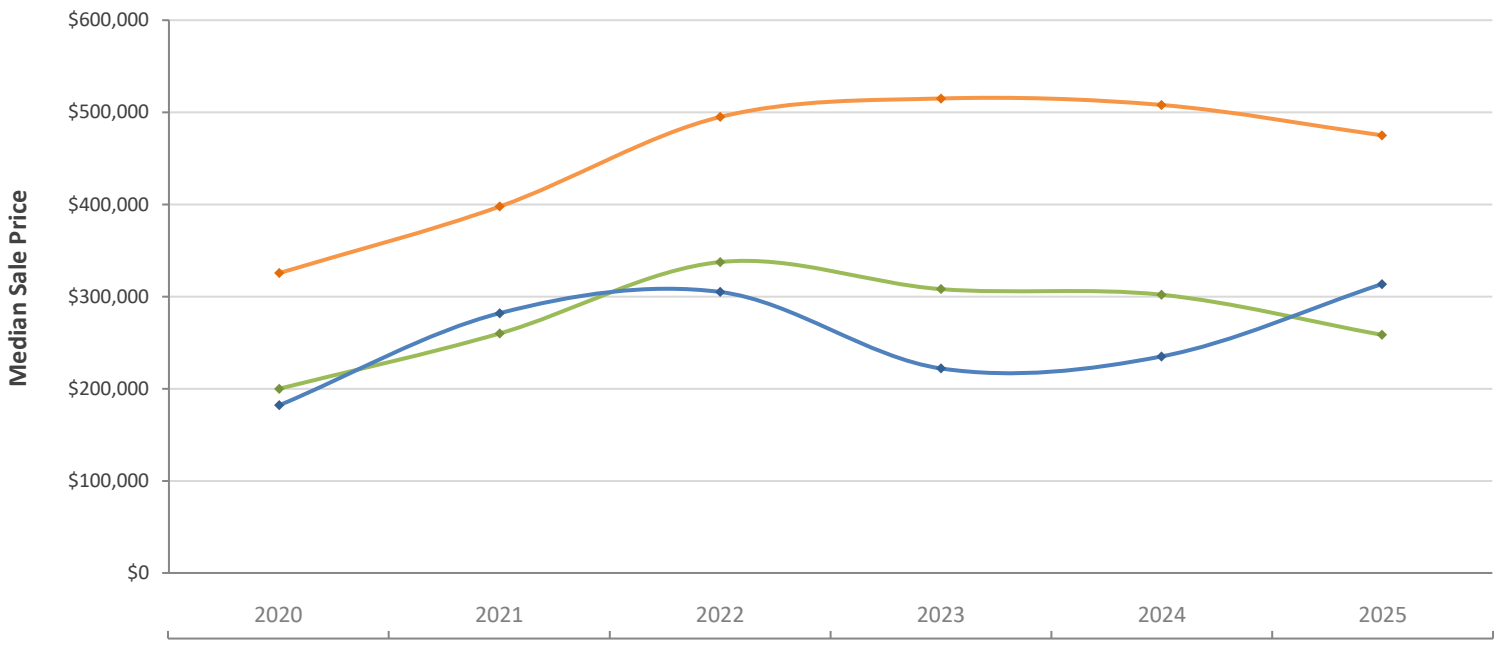
Yearly Distressed Market - 2025

Single-Family Homes

Sarasota County



		2025	2024	Percent Change Year-over-Year
Traditional	Closed Sales	8,117	7,453	8.9%
	Median Sale Price	\$475,000	\$508,000	-6.5%
Foreclosure/REO	Closed Sales	54	31	74.2%
	Median Sale Price	\$258,450	\$302,000	-14.4%
Short Sale	Closed Sales	12	2	500.0%
	Median Sale Price	\$313,600	\$235,000	33.4%

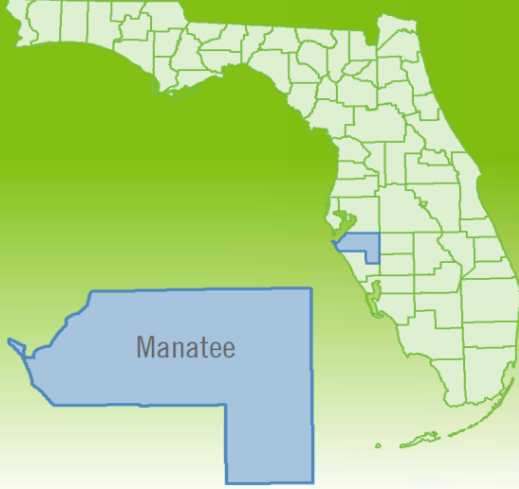


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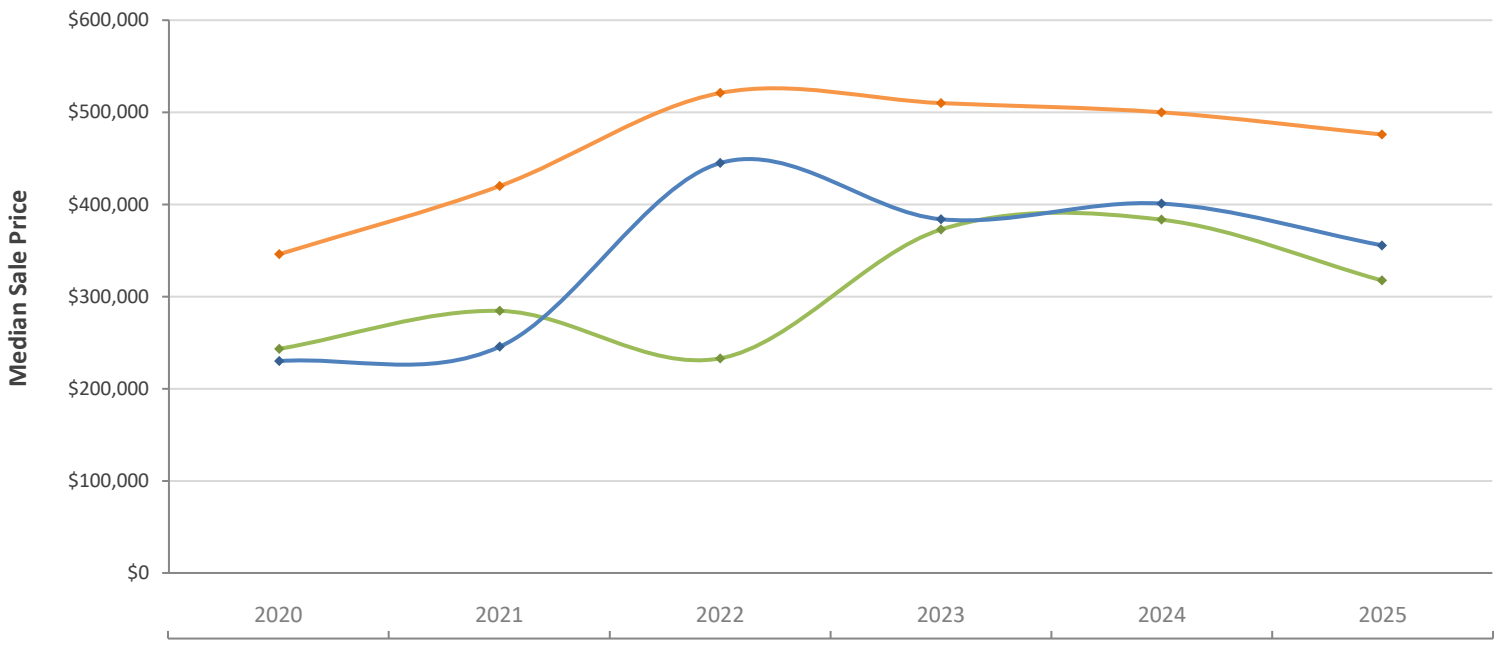
Yearly Distressed Market - 2025

Single-Family Homes

Manatee County



		2025	2024	Percent Change Year-over-Year
Traditional	Closed Sales	7,477	7,457	0.3%
	Median Sale Price	\$475,871	\$499,989	-4.8%
Foreclosure/REO	Closed Sales	32	20	60.0%
	Median Sale Price	\$317,450	\$383,450	-17.2%
Short Sale	Closed Sales	12	8	50.0%
	Median Sale Price	\$355,606	\$400,948	-11.3%

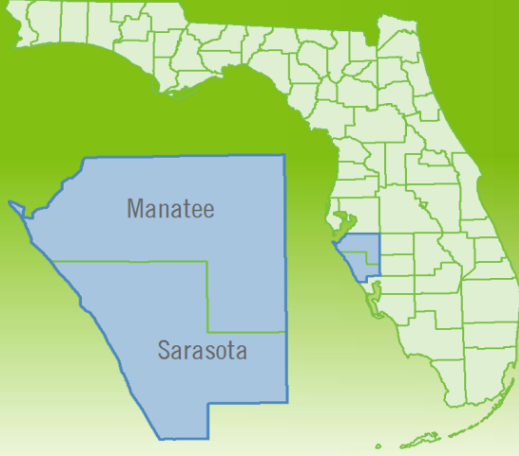


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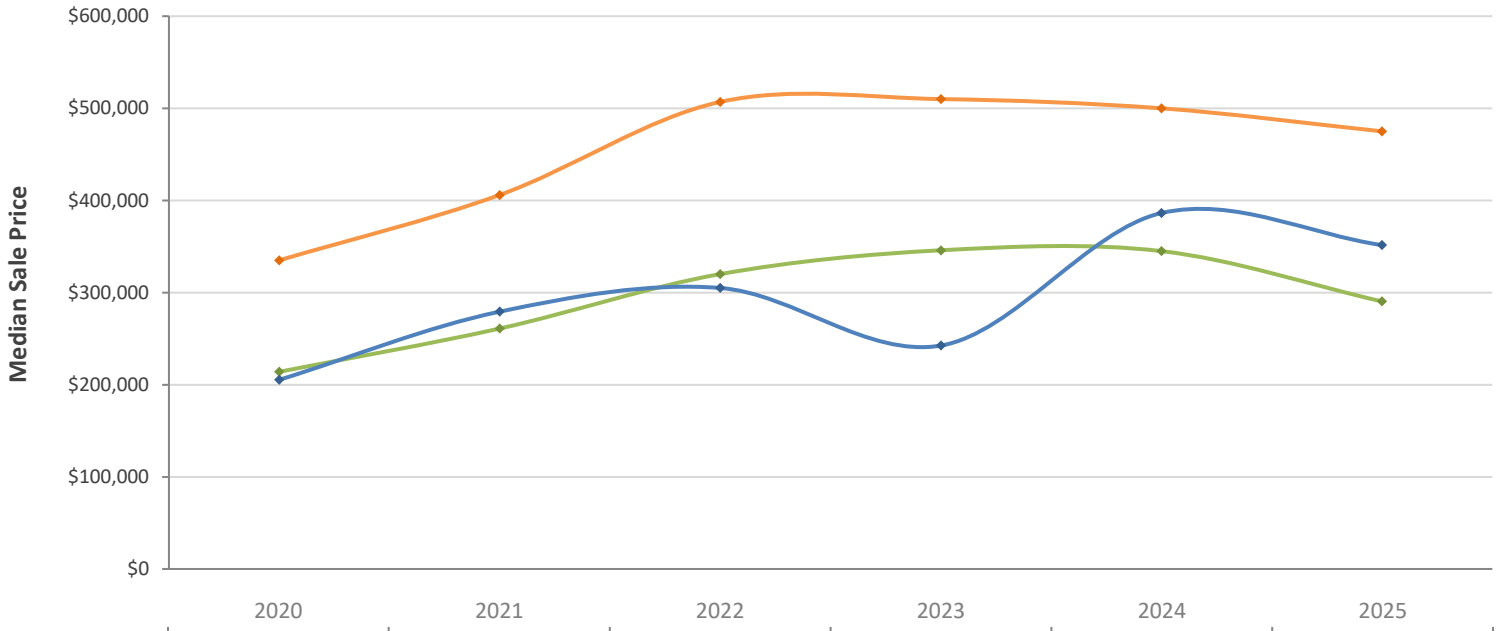
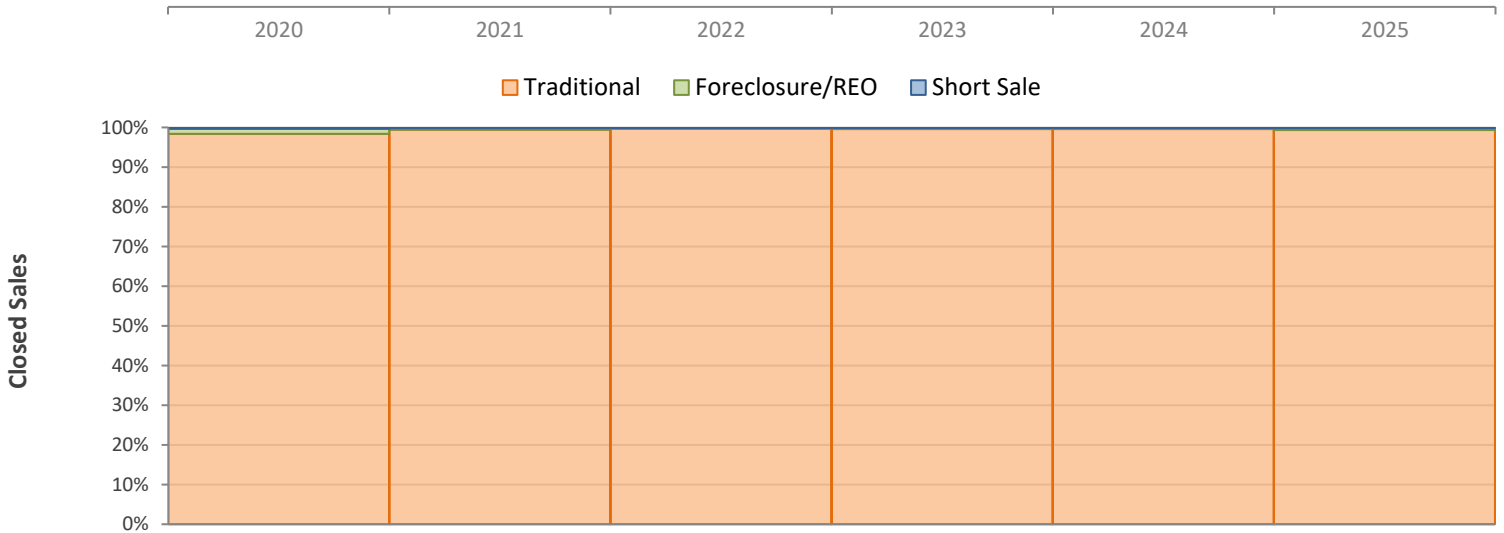
Yearly Distressed Market - 2025

Single-Family Homes

North Port-Sarasota-Bradenton MSA



		2025	2024	Percent Change Year-over-Year
Traditional	Closed Sales	15,594	14,910	4.6%
	Median Sale Price	\$475,000	\$500,000	-5.0%
Foreclosure/REO	Closed Sales	86	51	68.6%
	Median Sale Price	\$290,375	\$345,000	-15.8%
Short Sale	Closed Sales	24	10	140.0%
	Median Sale Price	\$351,500	\$386,343	-9.0%

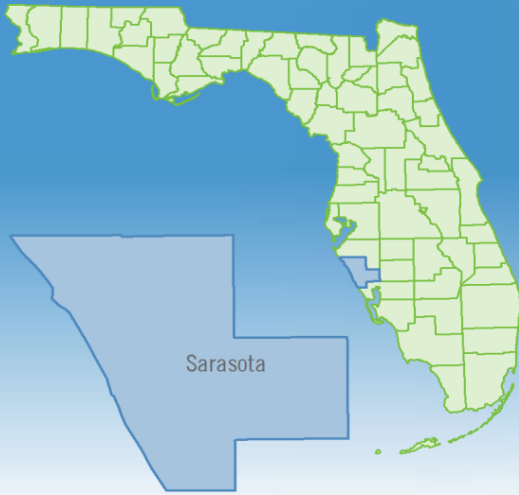


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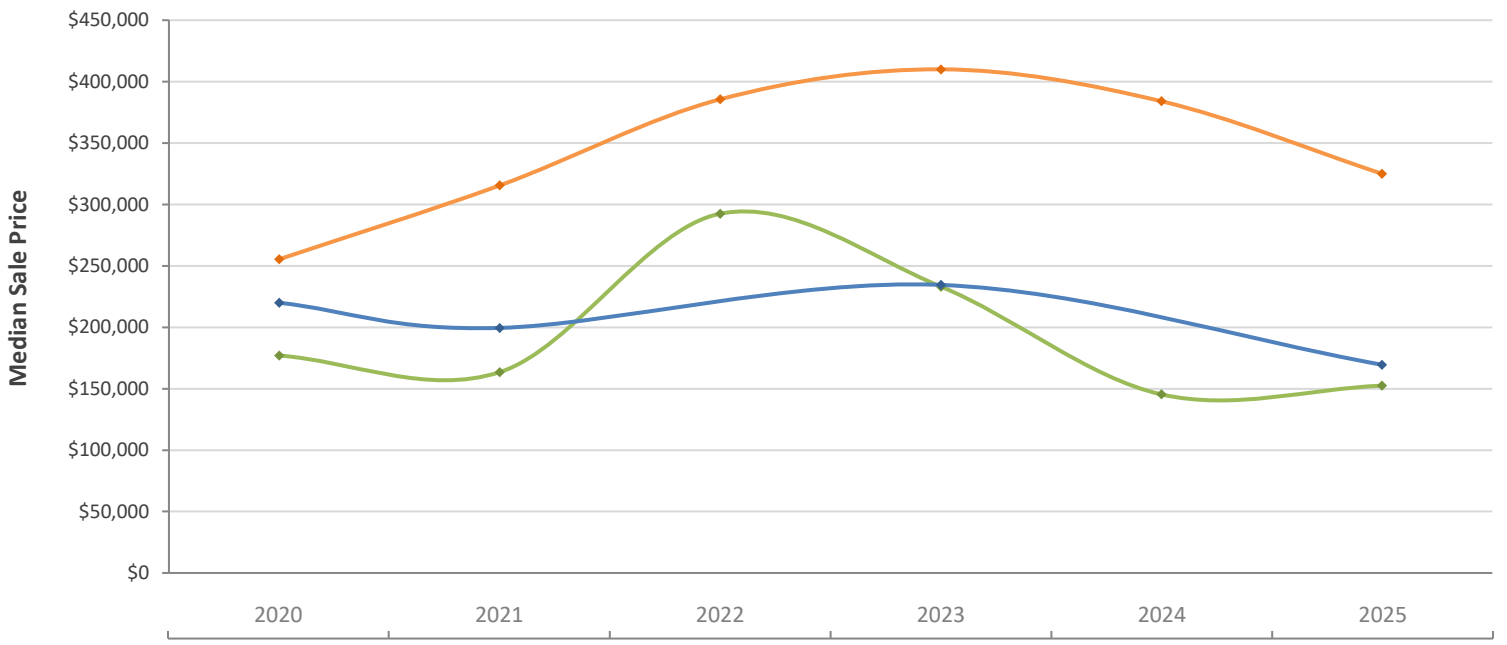
Yearly Distressed Market - 2025

Townhouses and Condos

Sarasota County



		2025	2024	Percent Change Year-over-Year
Traditional	Closed Sales	3,282	3,440	-4.6%
	Median Sale Price	\$325,000	\$383,999	-15.4%
Foreclosure/REO	Closed Sales	9	4	125.0%
	Median Sale Price	\$152,500	\$145,350	4.9%
Short Sale	Closed Sales	4	0	N/A
	Median Sale Price	\$169,500	(No Sales)	N/A



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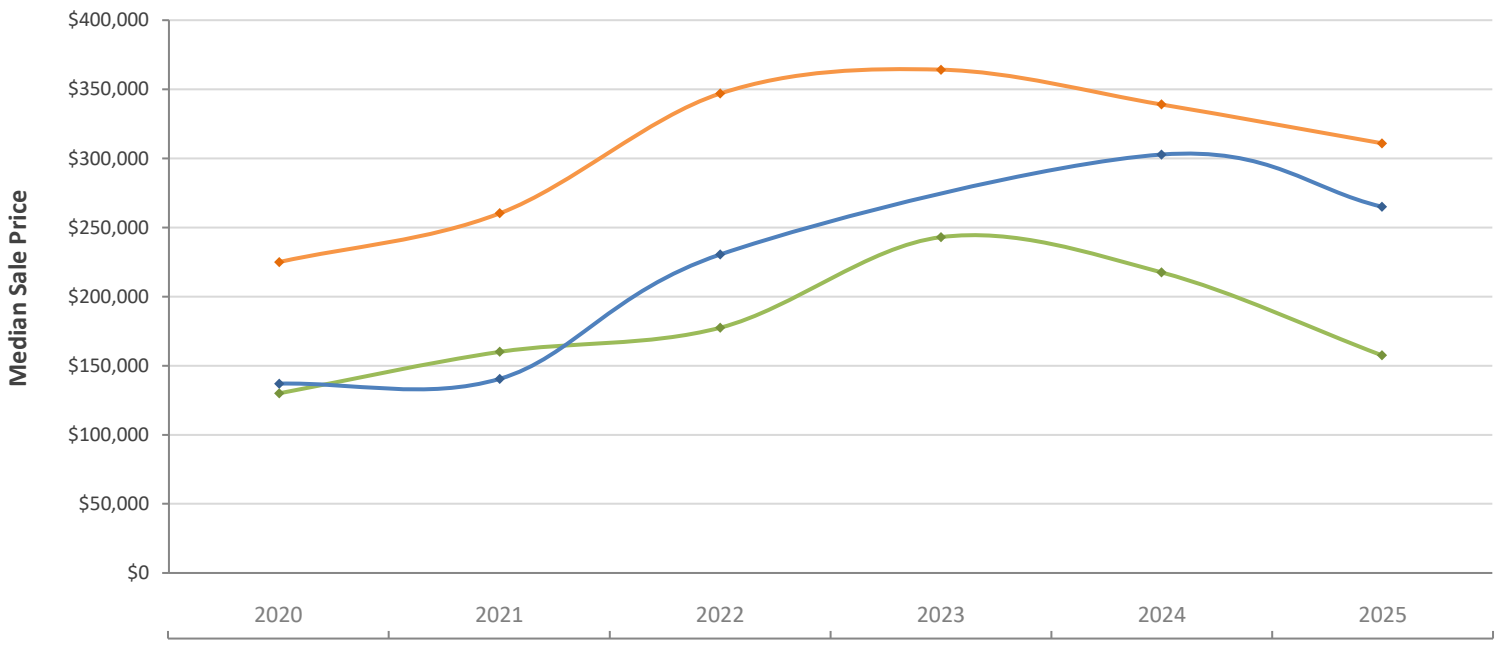
Yearly Distressed Market - 2025

Townhouses and Condos

Manatee County



		2025	2024	Percent Change Year-over-Year
Traditional	Closed Sales	2,709	2,588	4.7%
	Median Sale Price	\$310,911	\$338,990	-8.3%
Foreclosure/REO	Closed Sales	8	4	100.0%
	Median Sale Price	\$157,450	\$217,500	-27.6%
Short Sale	Closed Sales	2	2	0.0%
	Median Sale Price	\$265,000	\$302,776	-12.5%

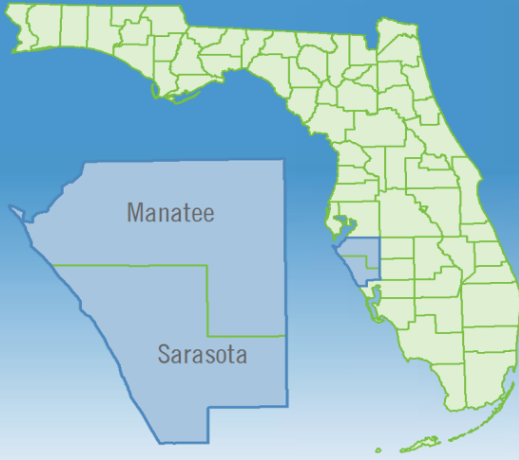


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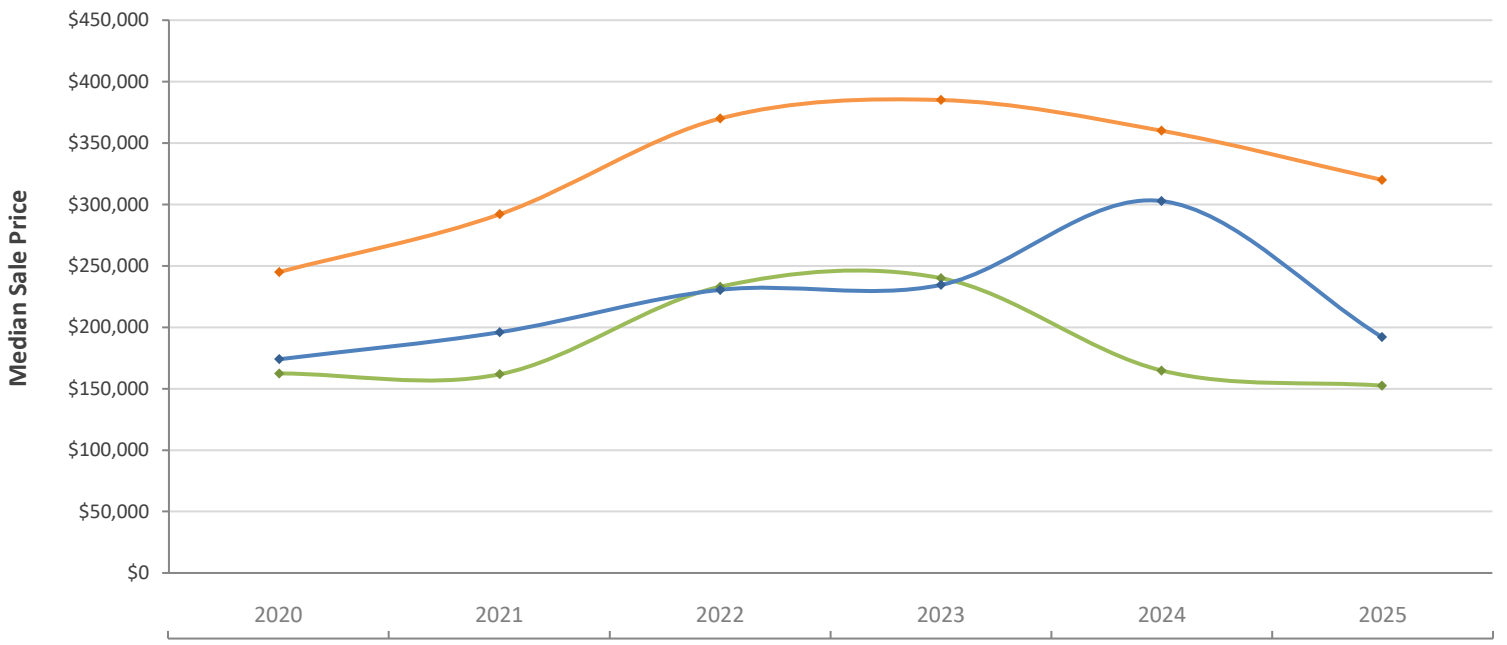
Yearly Distressed Market - 2025

Townhouses and Condos

North Port-Sarasota-Bradenton MSA



		2025	2024	Percent Change Year-over-Year
Traditional	Closed Sales	5,991	6,028	-0.6%
	Median Sale Price	\$320,000	\$360,000	-11.1%
Foreclosure/REO	Closed Sales	17	8	112.5%
	Median Sale Price	\$152,500	\$164,850	-7.5%
Short Sale	Closed Sales	6	2	200.0%
	Median Sale Price	\$192,000	\$302,776	-36.6%

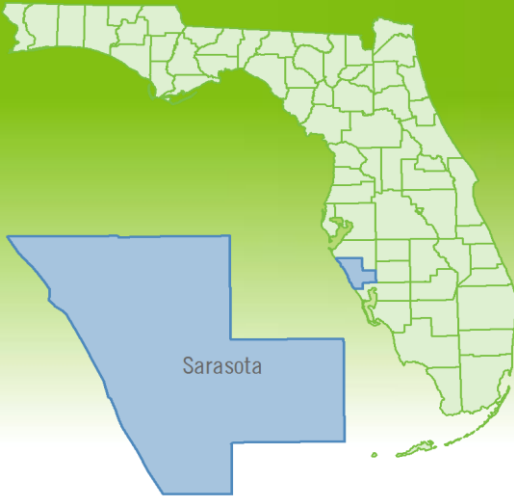


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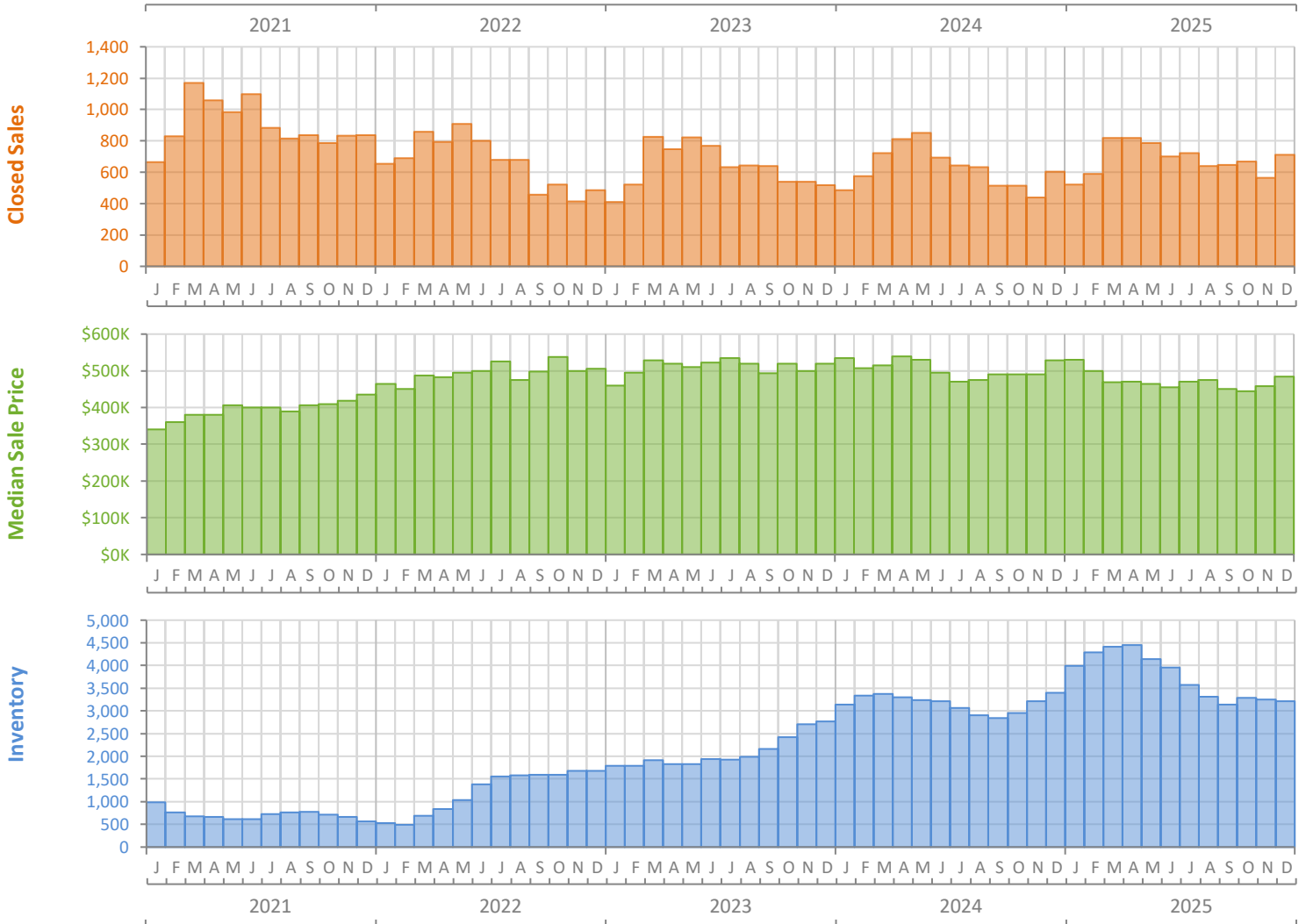
Monthly Market Summary - December 2025

Single-Family Homes

Sarasota County



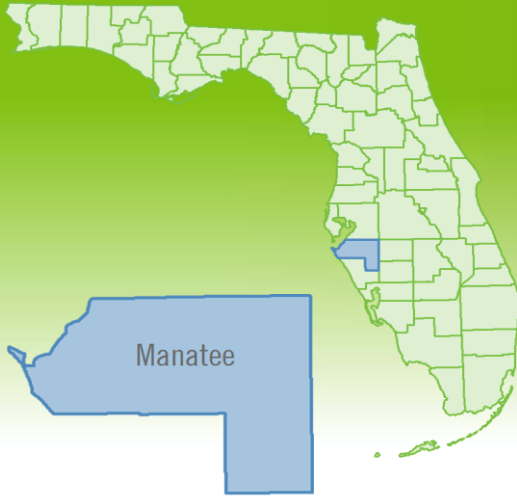
	December 2025	December 2024	Percent Change Year-over-Year
Closed Sales	711	604	17.7%
Paid in Cash	275	266	3.4%
Median Sale Price	\$485,000	\$528,700	-8.3%
Average Sale Price	\$697,579	\$736,508	-5.3%
Dollar Volume	\$496.0 Million	\$444.9 Million	11.5%
Med. Pct. of Orig. List Price Received	93.5%	94.8%	-1.4%
Median Time to Contract	51 Days	43 Days	18.6%
Median Time to Sale	89 Days	82 Days	8.5%
New Pending Sales	524	516	1.6%
New Listings	748	920	-18.7%
Pending Inventory	640	652	-1.8%
Inventory (Active Listings)	3,211	3,404	-5.7%
Months Supply of Inventory	4.7	5.5	-14.5%



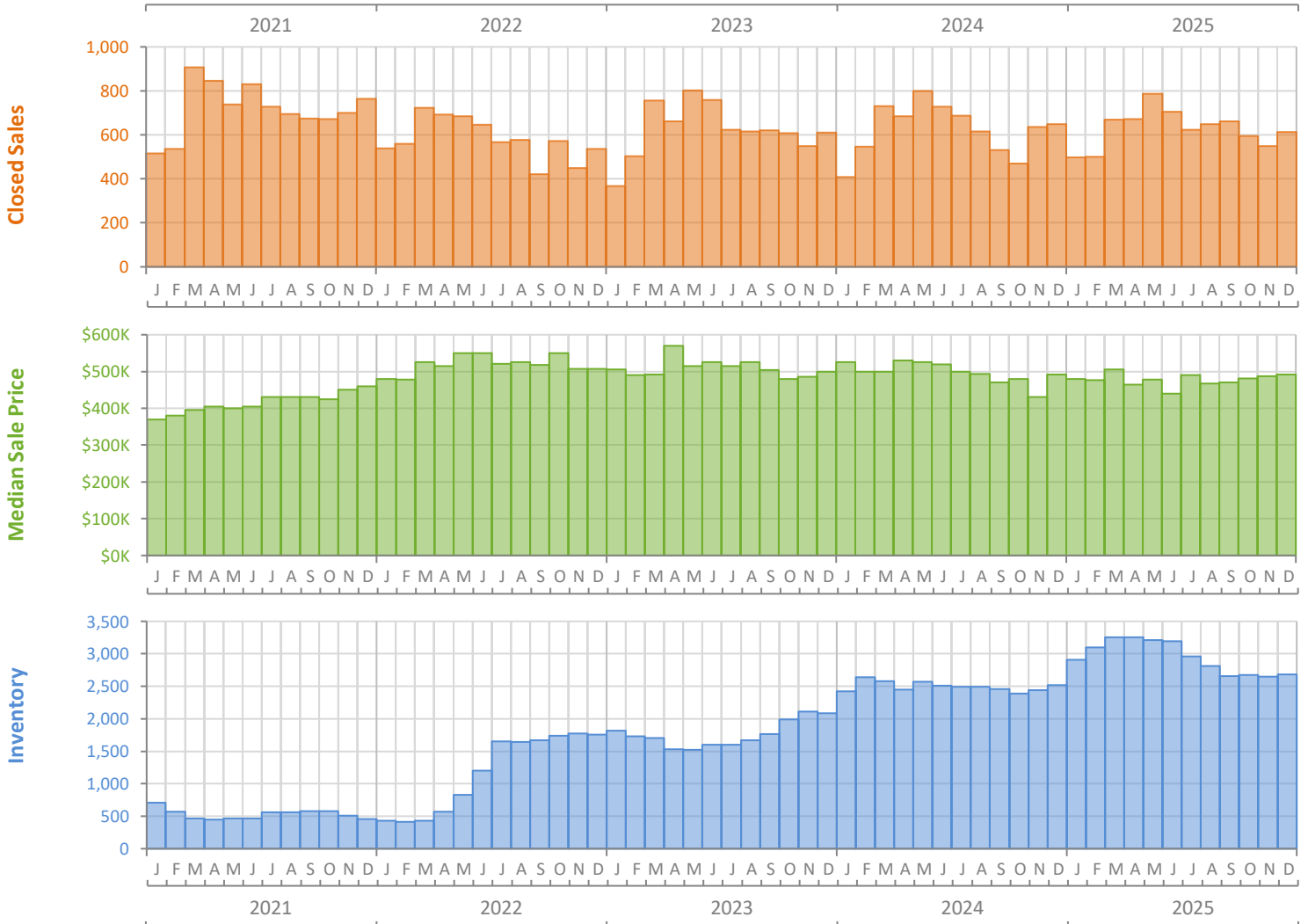
Monthly Market Summary - December 2025

Single-Family Homes

Manatee County



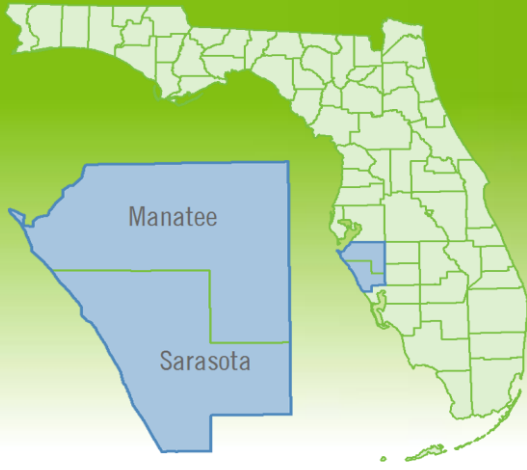
	December 2025	December 2024	Percent Change Year-over-Year
Closed Sales	612	648	-5.6%
Paid in Cash	185	204	-9.3%
Median Sale Price	\$491,500	\$492,045	-0.1%
Average Sale Price	\$653,048	\$675,263	-3.3%
Dollar Volume	\$399.7 Million	\$437.6 Million	-8.7%
Med. Pct. of Orig. List Price Received	94.6%	94.6%	0.0%
Median Time to Contract	55 Days	56 Days	-1.8%
Median Time to Sale	102 Days	101 Days	1.0%
New Pending Sales	493	501	-1.6%
New Listings	724	735	-1.5%
Pending Inventory	665	645	3.1%
Inventory (Active Listings)	2,687	2,518	6.7%
Months Supply of Inventory	4.3	4.0	7.5%



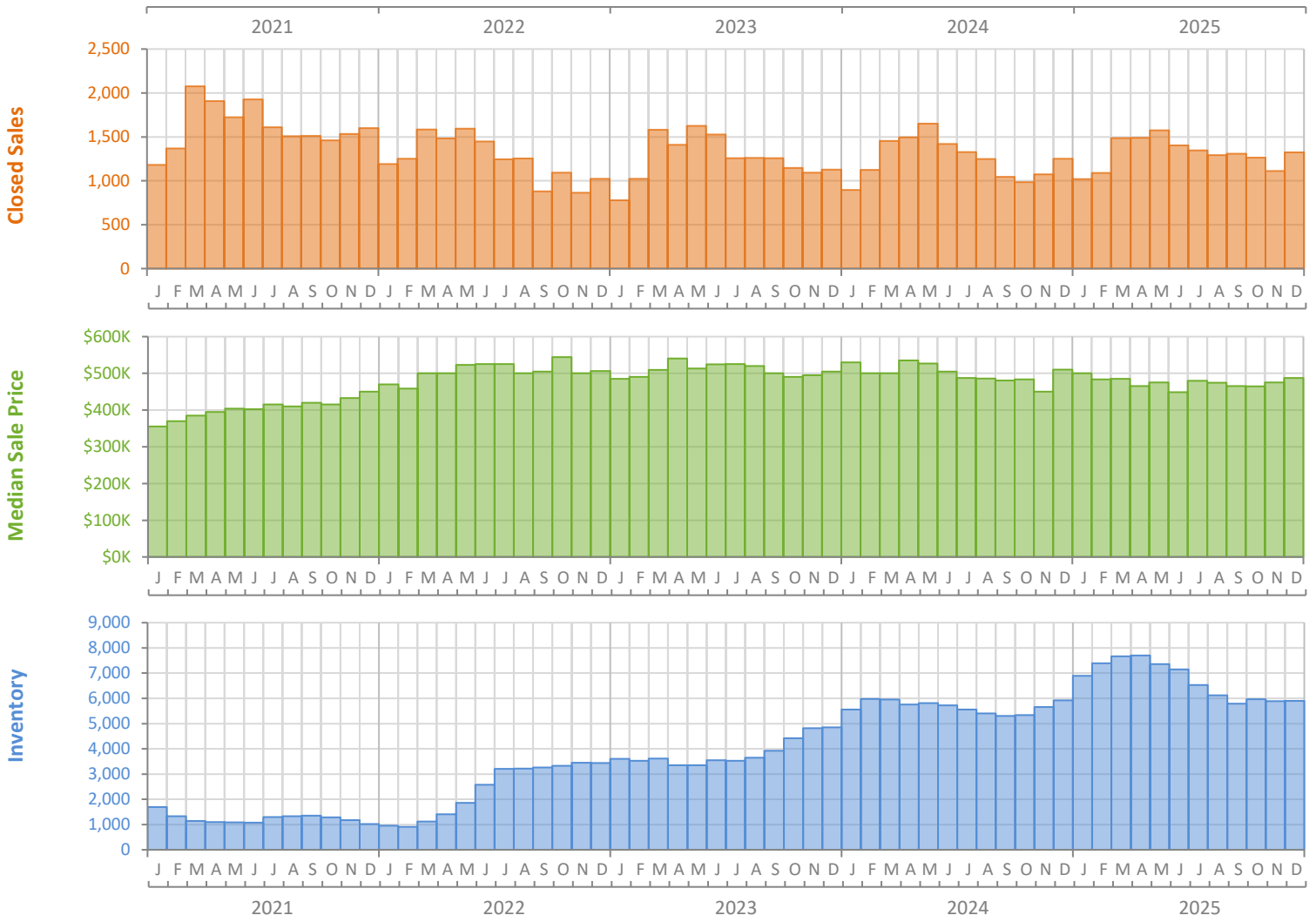
Monthly Market Summary - December 2025

Single-Family Homes

North Port-Sarasota-Bradenton MSA



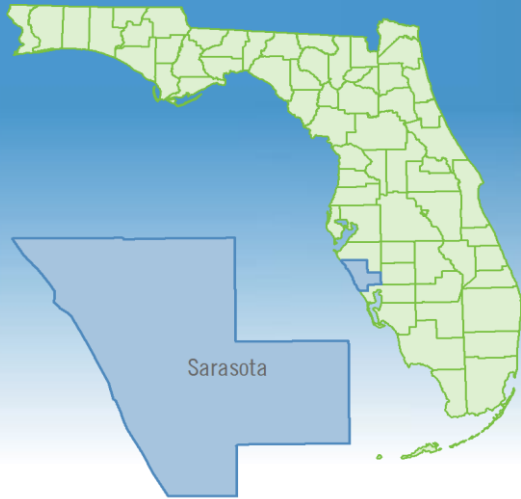
	December 2025	December 2024	Percent Change Year-over-Year
Closed Sales	1,323	1,252	5.7%
Paid in Cash	460	470	-2.1%
Median Sale Price	\$487,250	\$510,000	-4.5%
Average Sale Price	\$676,964	\$704,759	-3.9%
Dollar Volume	\$895.6 Million	\$882.4 Million	1.5%
Med. Pct. of Orig. List Price Received	94.1%	94.7%	-0.6%
Median Time to Contract	52 Days	49 Days	6.1%
Median Time to Sale	96 Days	89 Days	7.9%
New Pending Sales	1,017	1,017	0.0%
New Listings	1,472	1,655	-11.1%
Pending Inventory	1,305	1,297	0.6%
Inventory (Active Listings)	5,898	5,922	-0.4%
Months Supply of Inventory	4.5	4.7	-4.3%



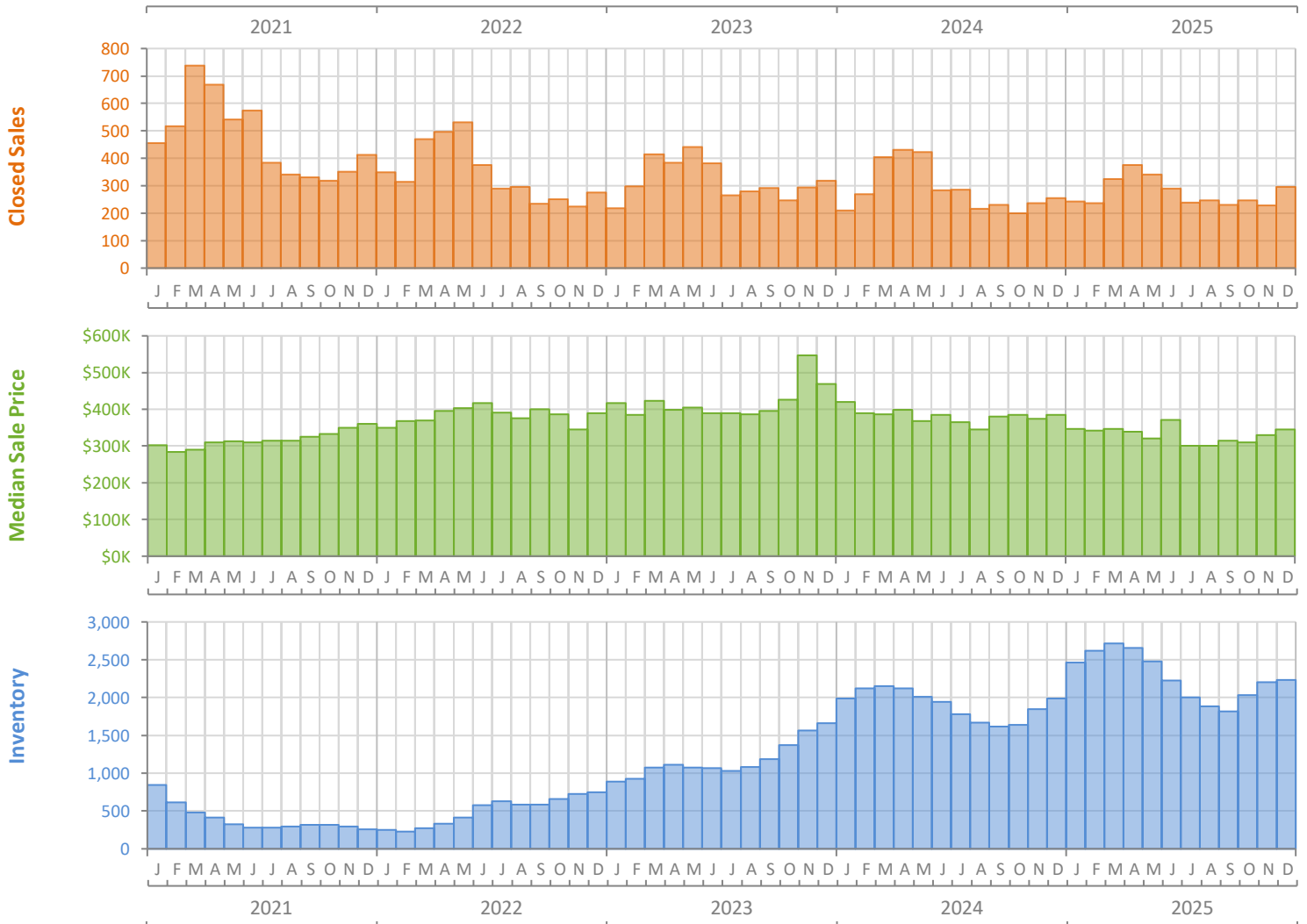
Monthly Market Summary - December 2025

Townhouses and Condos

Sarasota County



	December 2025	December 2024	Percent Change Year-over-Year
Closed Sales	295	256	15.2%
Paid in Cash	190	173	9.8%
Median Sale Price	\$345,000	\$384,250	-10.2%
Average Sale Price	\$570,164	\$843,042	-32.4%
Dollar Volume	\$168.2 Million	\$215.8 Million	-22.1%
Med. Pct. of Orig. List Price Received	92.2%	93.7%	-1.6%
Median Time to Contract	59 Days	67 Days	-11.9%
Median Time to Sale	99 Days	109 Days	-9.2%
New Pending Sales	247	206	19.9%
New Listings	383	503	-23.9%
Pending Inventory	461	435	6.0%
Inventory (Active Listings)	2,231	1,987	12.3%
Months Supply of Inventory	8.1	6.9	17.4%



Monthly Market Summary - December 2025

Townhouses and Condos

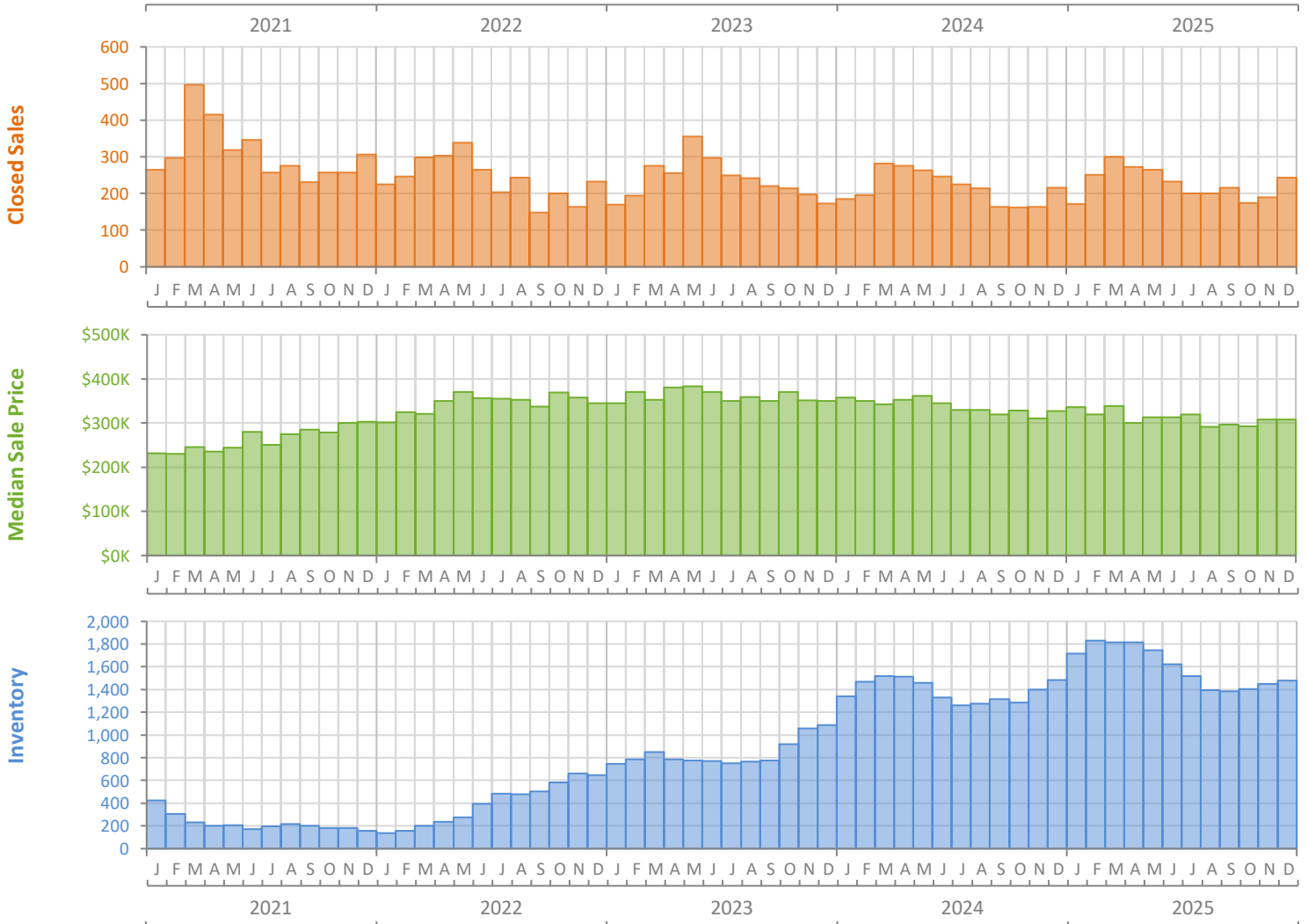
Manatee County



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	December 2025	December 2024	Percent Change Year-over-Year
Closed Sales	244	216	13.0%
Paid in Cash	142	108	31.5%
Median Sale Price	\$307,500	\$327,000	-6.0%
Average Sale Price	\$352,068	\$361,827	-2.7%
Dollar Volume	\$85.9 Million	\$78.2 Million	9.9%
Med. Pct. of Orig. List Price Received	92.3%	94.8%	-2.6%
Median Time to Contract	63 Days	56 Days	12.5%
Median Time to Sale	100 Days	110 Days	-9.1%
New Pending Sales	196	193	1.6%
New Listings	339	353	-4.0%
Pending Inventory	235	248	-5.2%
Inventory (Active Listings)	1,480	1,483	-0.2%
Months Supply of Inventory	6.5	6.9	-5.8%



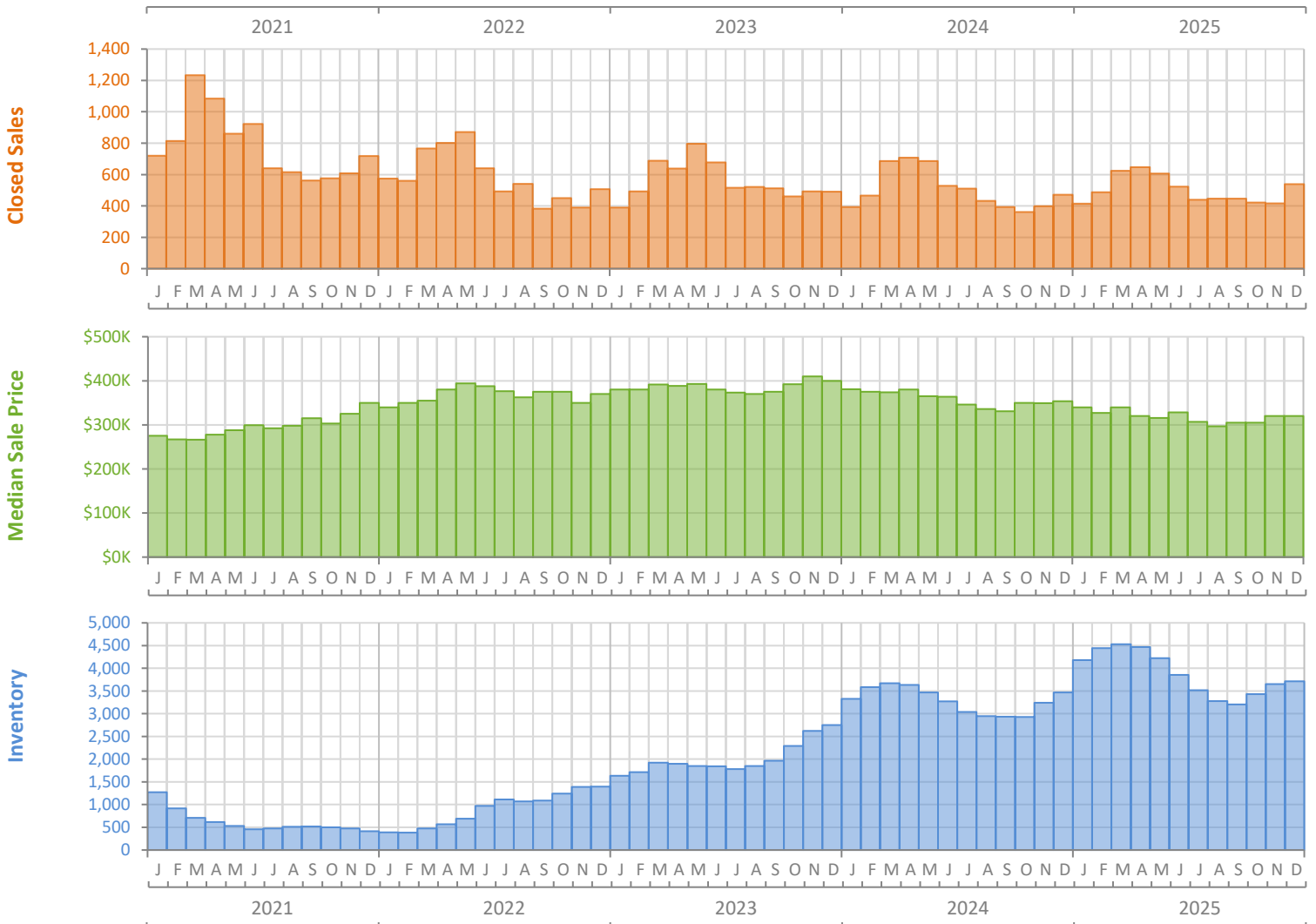
Monthly Market Summary - December 2025

Townhouses and Condos

North Port-Sarasota-Bradenton MSA



	December 2025	December 2024	Percent Change Year-over-Year
Closed Sales	539	472	14.2%
Paid in Cash	332	281	18.1%
Median Sale Price	\$320,000	\$353,500	-9.5%
Average Sale Price	\$471,434	\$622,825	-24.3%
Dollar Volume	\$254.1 Million	\$294.0 Million	-13.6%
Med. Pct. of Orig. List Price Received	92.2%	94.1%	-2.0%
Median Time to Contract	62 Days	59 Days	5.1%
Median Time to Sale	100 Days	109 Days	-8.3%
New Pending Sales	443	399	11.0%
New Listings	722	856	-15.7%
Pending Inventory	696	683	1.9%
Inventory (Active Listings)	3,711	3,470	6.9%
Months Supply of Inventory	7.4	6.9	7.2%





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RASM MARKET STATISTICS

EXPANDED REPORTS

Sarasota and Manatee Counties

DECEMBER 2025

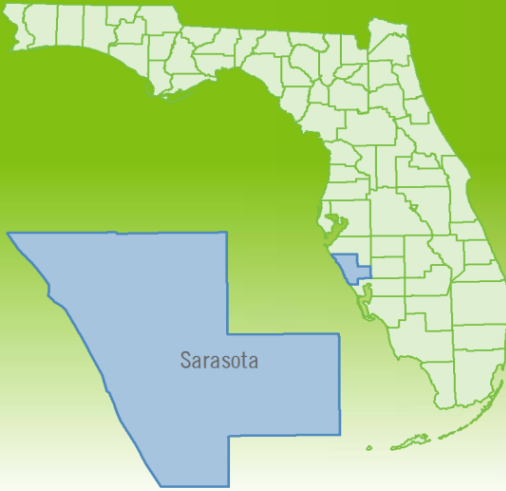
Reach Further With The Market.

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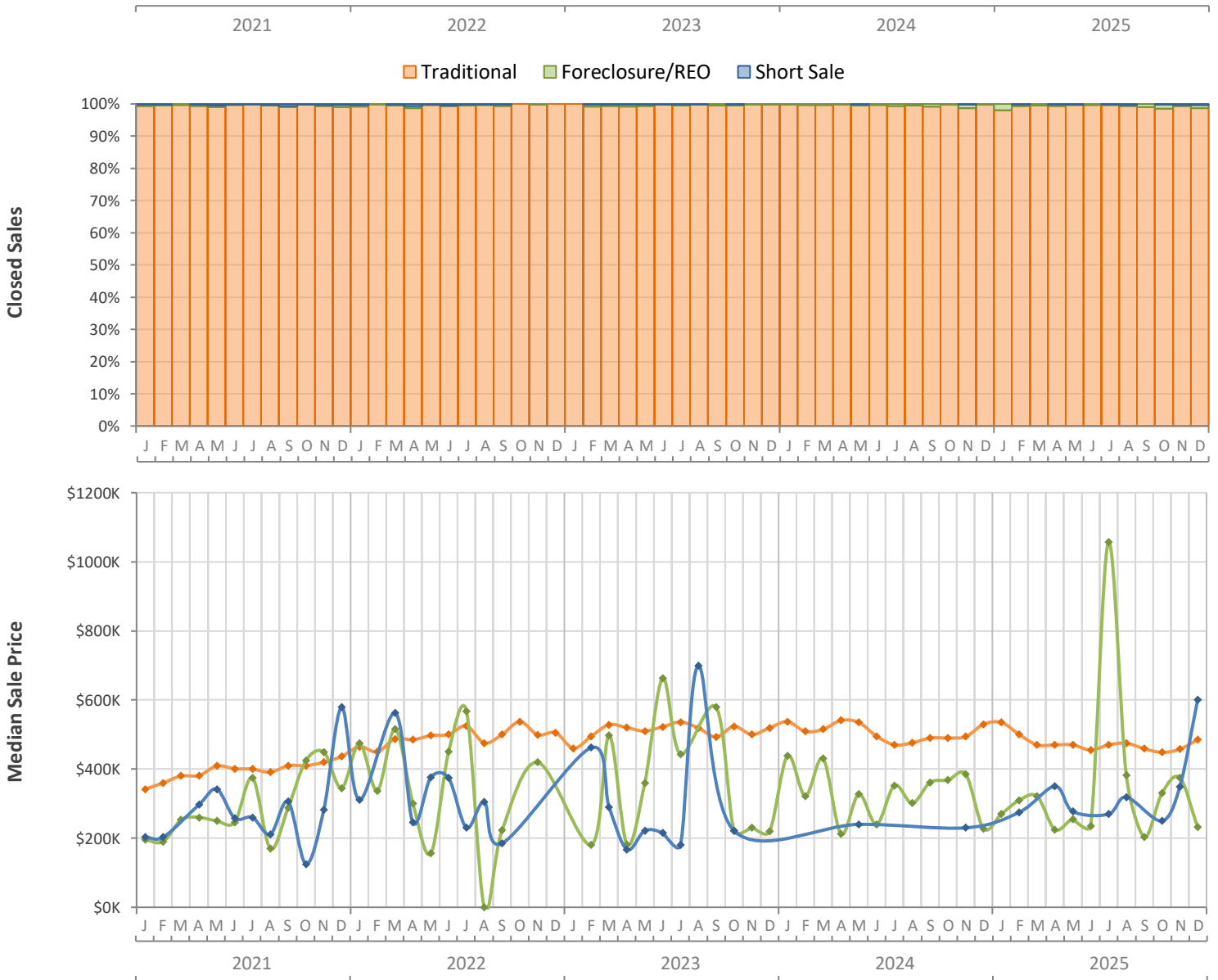
Monthly Distressed Market - December 2025

Single-Family Homes

Sarasota County



		December 2025	December 2024	Percent Change Year-over-Year
Traditional	Closed Sales	701	603	16.3%
	Median Sale Price	\$485,000	\$529,900	-8.5%
Foreclosure/REO	Closed Sales	7	1	600.0%
	Median Sale Price	\$232,000	\$228,000	1.8%
Short Sale	Closed Sales	3	0	N/A
	Median Sale Price	\$600,000	(No Sales)	N/A

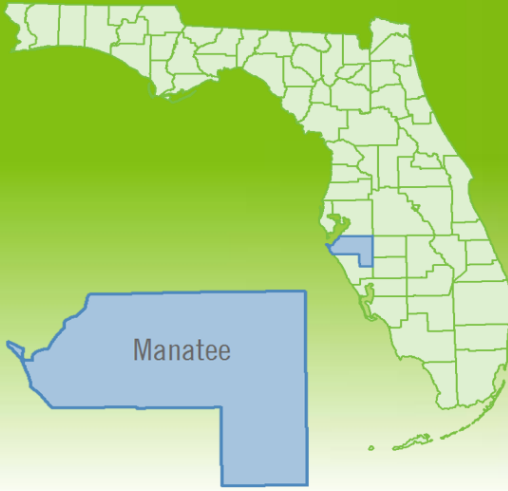


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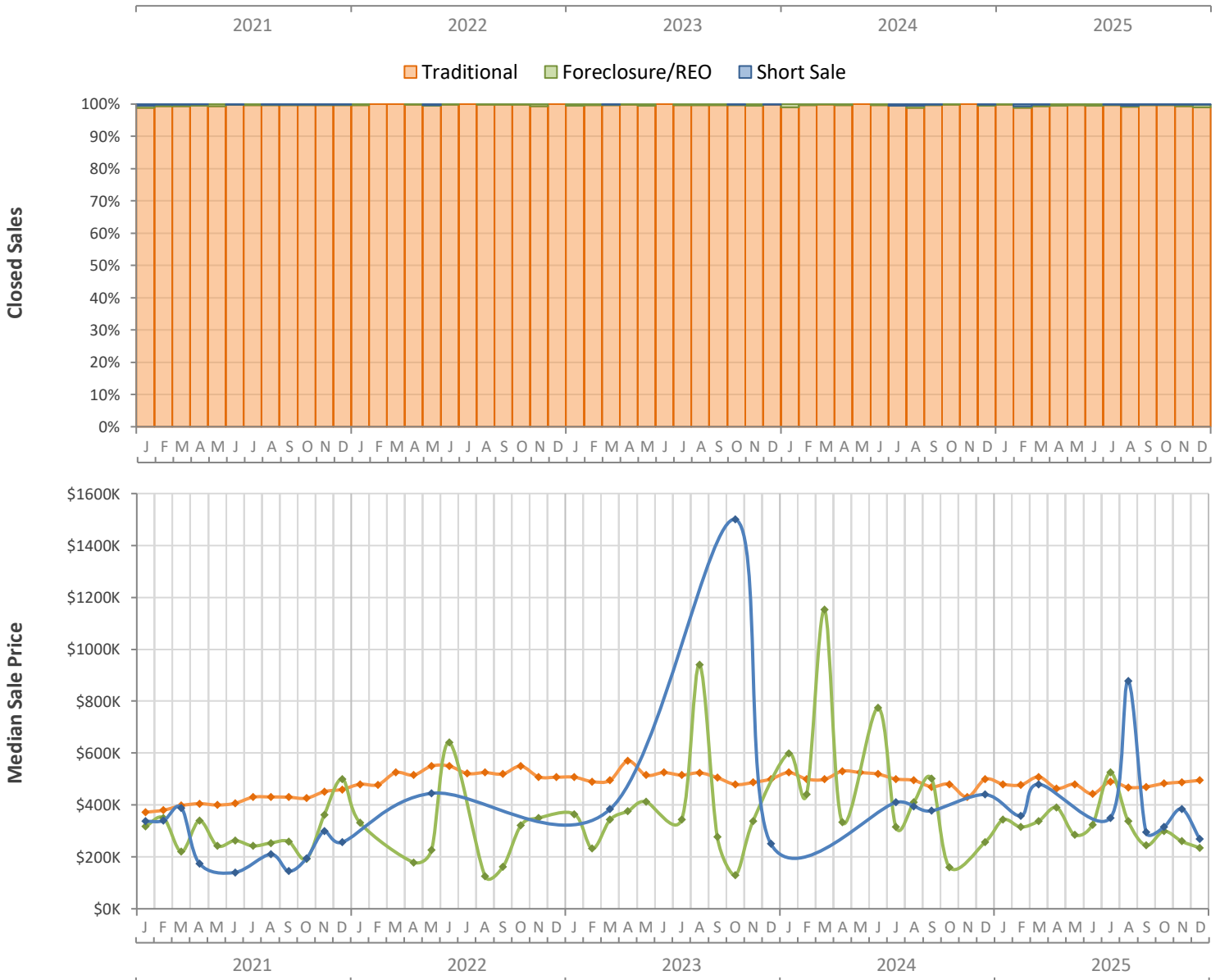
Monthly Distressed Market - December 2025

Single-Family Homes

Manatee County



		December 2025	December 2024	Percent Change Year-over-Year
Traditional	Closed Sales	606	645	-6.0%
	Median Sale Price	\$495,000	\$499,509	-0.9%
Foreclosure/REO	Closed Sales	5	2	150.0%
	Median Sale Price	\$235,000	\$257,500	-8.7%
Short Sale	Closed Sales	1	1	0.0%
	Median Sale Price	\$270,000	\$440,000	-38.6%

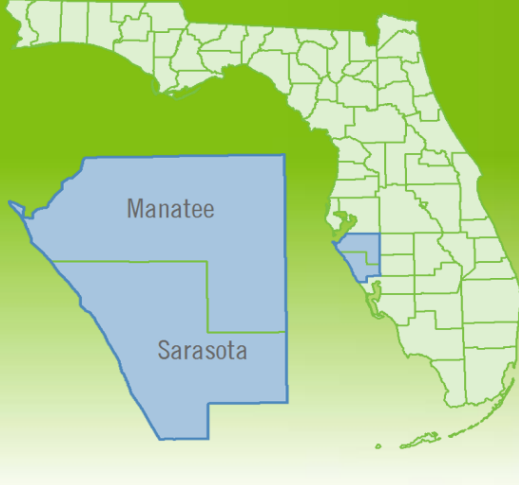


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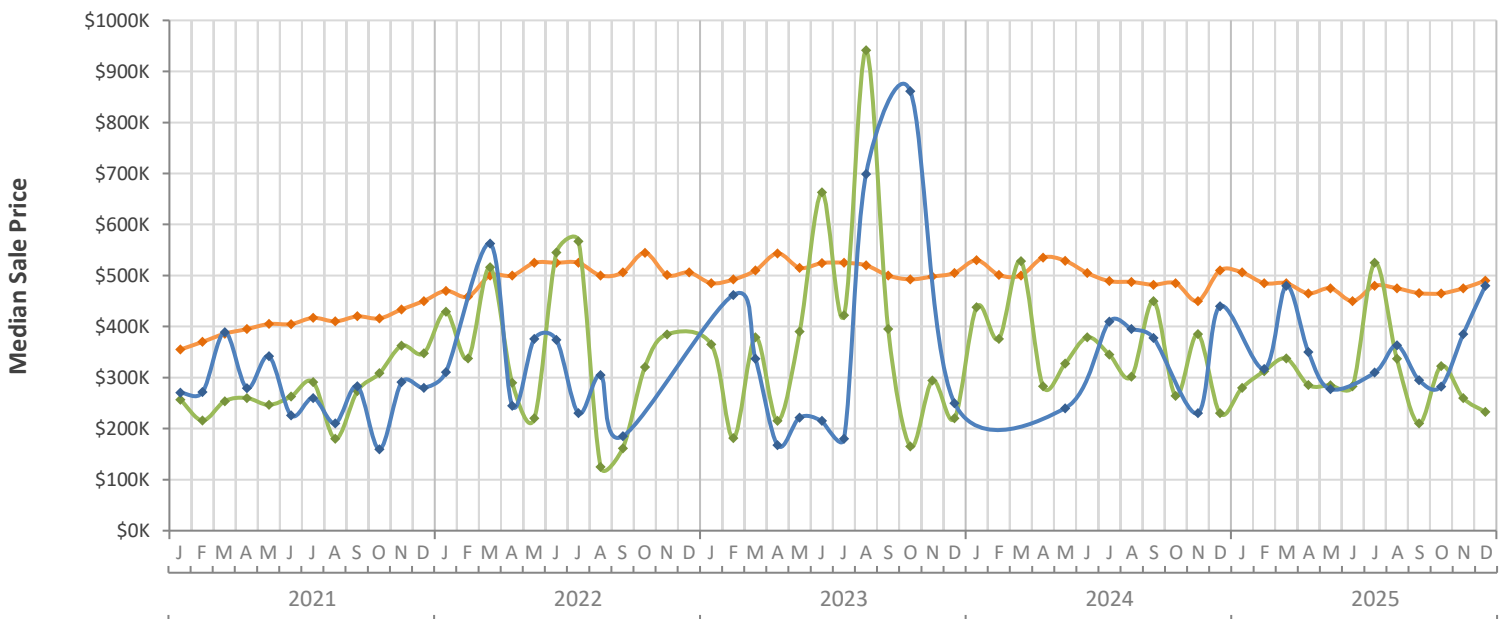
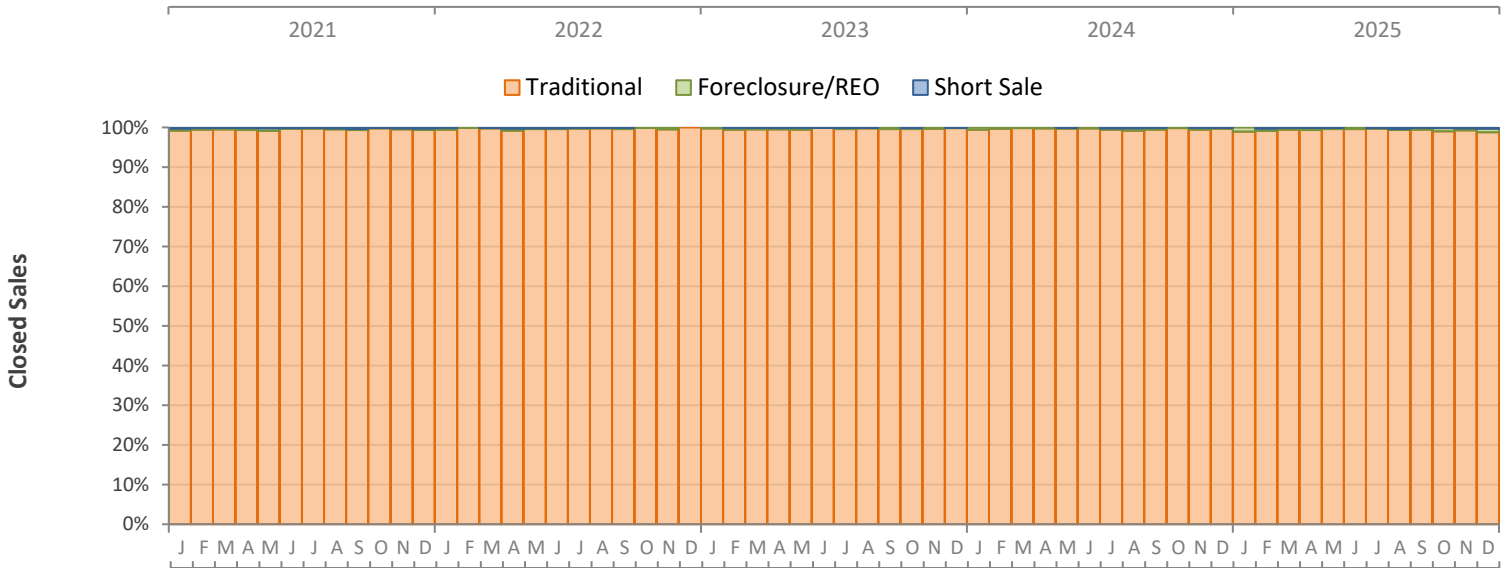
Monthly Distressed Market - December 2025

Single-Family Homes

North Port-Sarasota-Bradenton MSA



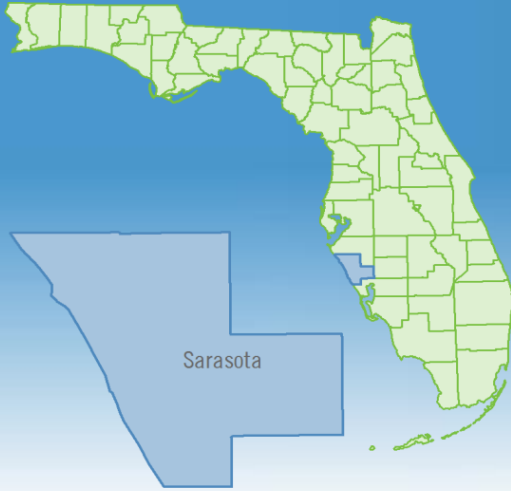
		December 2025	December 2024	Percent Change Year-over-Year
Traditional	Closed Sales	1,307	1,248	4.7%
	Median Sale Price	\$490,000	\$510,000	-3.9%
Foreclosure/REO	Closed Sales	12	3	300.0%
	Median Sale Price	\$232,500	\$230,000	1.1%
Short Sale	Closed Sales	4	1	300.0%
	Median Sale Price	\$480,000	\$440,000	9.1%



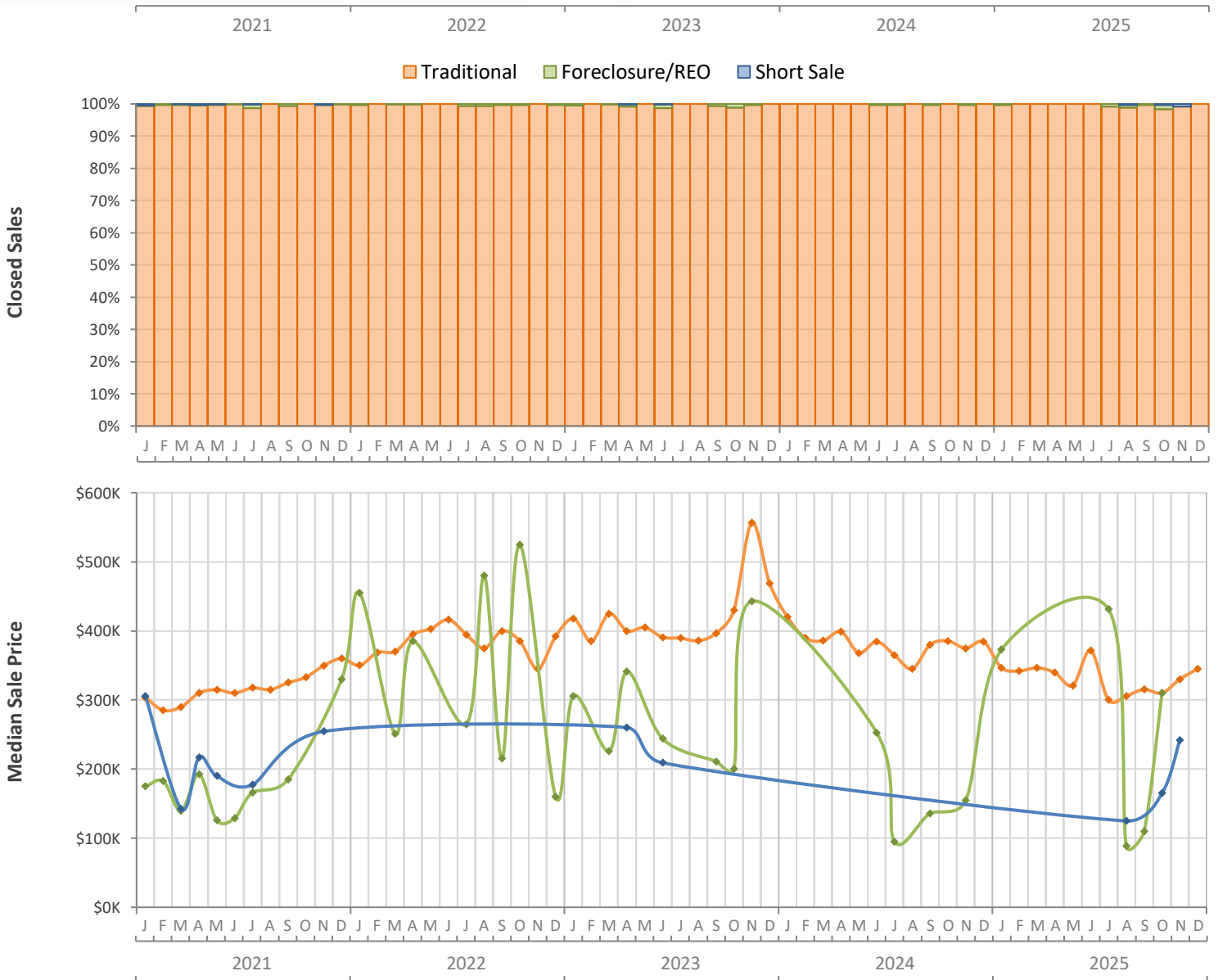
Monthly Distressed Market - December 2025

Townhouses and Condos

Sarasota County



		December 2025	December 2024	Percent Change Year-over-Year
Traditional	Closed Sales	295	256	15.2%
	Median Sale Price	\$345,000	\$384,250	-10.2%
Foreclosure/REO	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A
Short Sale	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A



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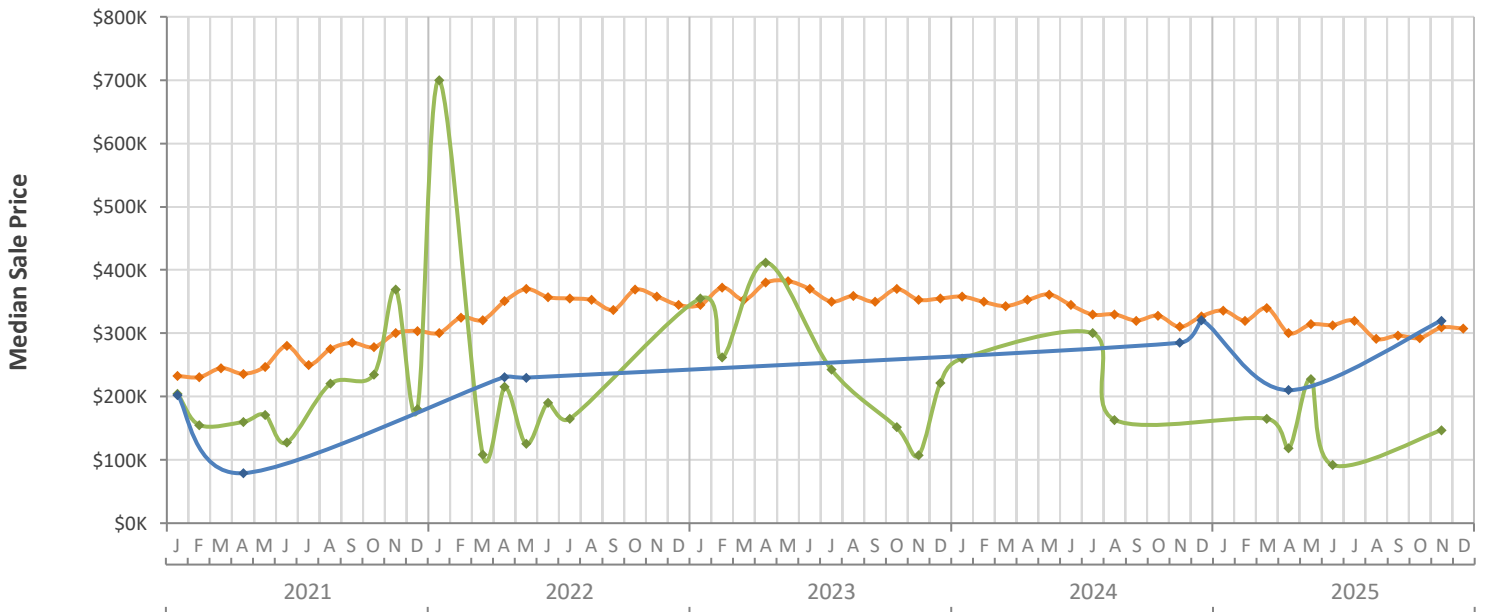
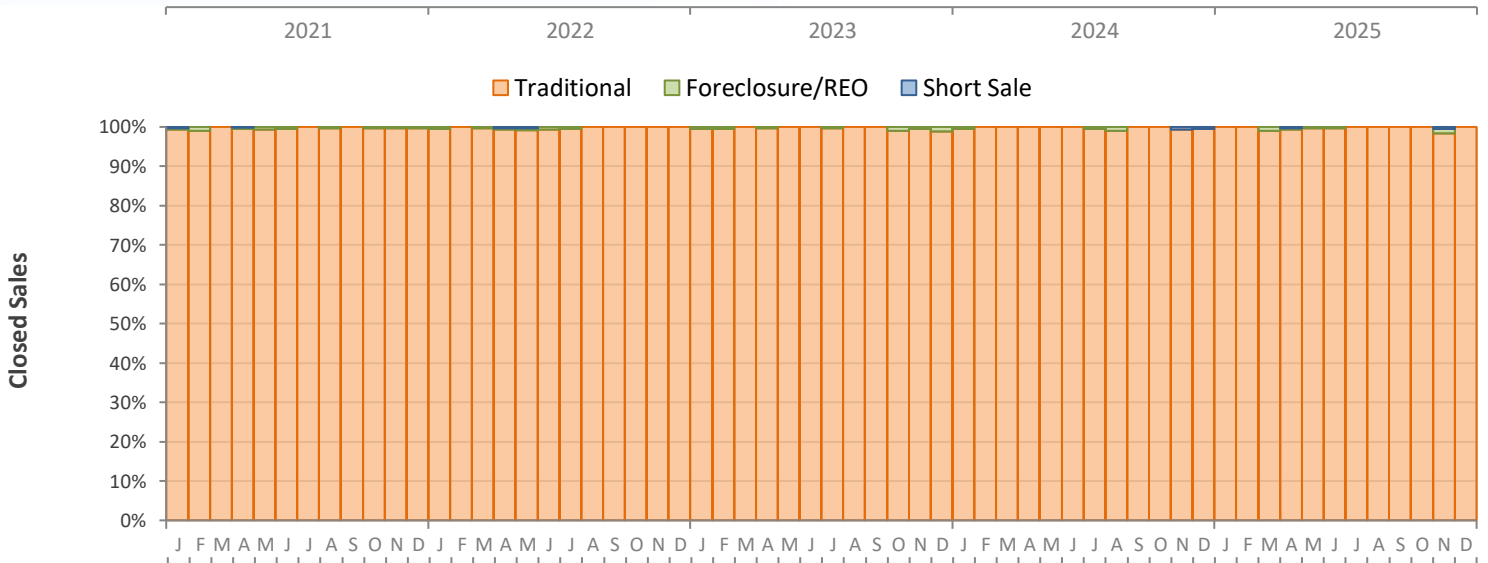
Monthly Distressed Market - December 2025

Townhouses and Condos

Manatee County



		December 2025	December 2024	Percent Change Year-over-Year
Traditional	Closed Sales	244	215	13.5%
	Median Sale Price	\$307,500	\$327,000	-6.0%
Foreclosure/REO	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A
Short Sale	Closed Sales	0	1	-100.0%
	Median Sale Price	(No Sales)	\$320,552	N/A

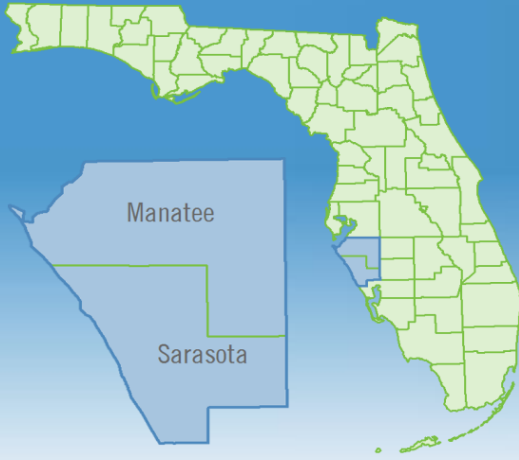


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Monthly Distressed Market - December 2025

Townhouses and Condos

North Port-Sarasota-Bradenton MSA



		December 2025	December 2024	Percent Change Year-over-Year
Traditional	Closed Sales	539	471	14.4%
	Median Sale Price	\$320,000	\$354,000	-9.6%
Foreclosure/REO	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A
Short Sale	Closed Sales	0	1	-100.0%
	Median Sale Price	(No Sales)	\$320,552	N/A

