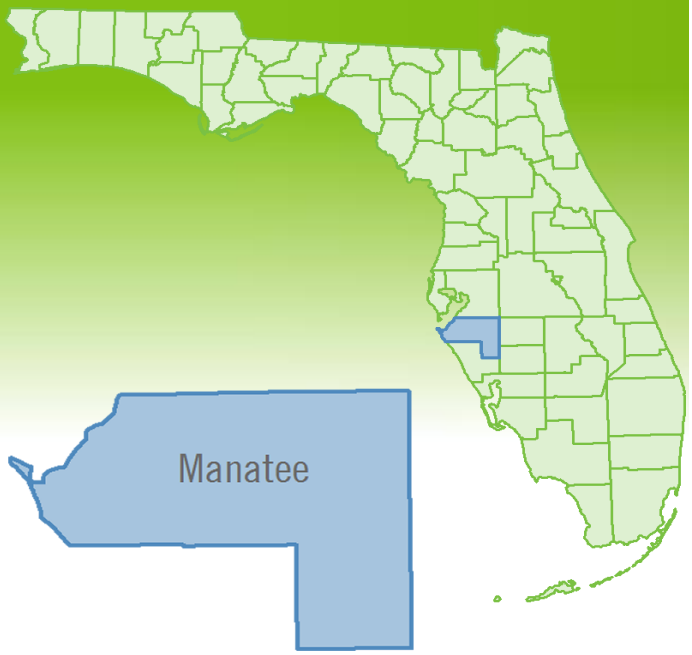
Monthly Market Detail - September 2026
Single-Family Homes
Manatee County



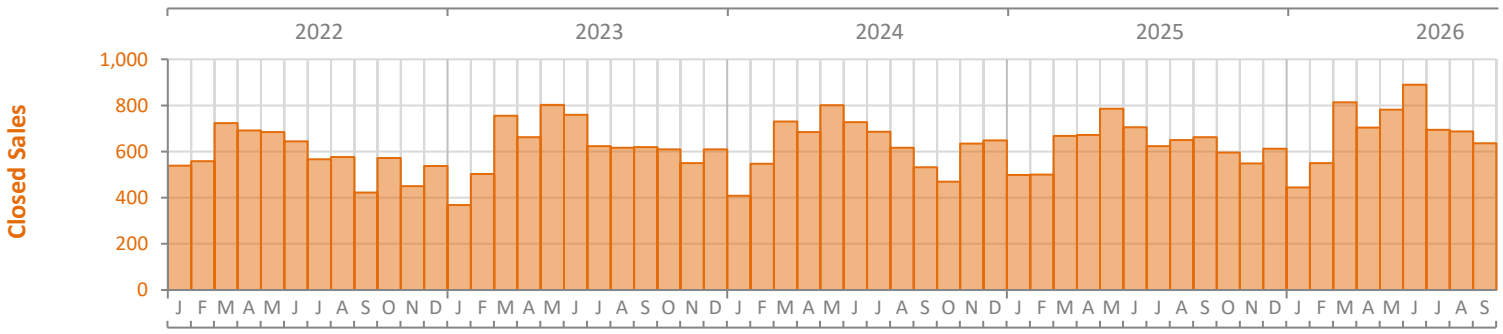
Summary Statistics	September 2026	September 2025	Percent Change Year-over-Year
Closed Sales	636	662	-3.9%
Paid in Cash	180	198	-9.1%
Median Sale Price	$485,000	$470,000	3.2%
Average Sale Price	$629,444	$593,139	6.1%
Dollar Volume	$400.3 Million	$392.7 Million	2.0%
Median Percent of Original List Price Received	95.7%	93.3%	2.6%
Median Time to Contract	53 Days	60 Days	-11.7%
Median Time to Sale	103 Days	109 Days	-5.5%
New Pending Sales	559	580	-3.6%
New Listings	741	681	8.8%
Pending Inventory	820	794	3.3%
Inventory (Active Listings)	2,610	2,656	-1.7%
Months Supply of Inventory	3.9	4.2	-7.1%

Closed Sales

The number of sales transactions which closed during the month

Economists' note : Closed Sales are one of the simplest—yet most important—indicators for the residential real estate market. When comparing Closed Sales across markets of different sizes, we recommend comparing the percent changes in sales rather than the number of sales. Closed Sales (and many other market metrics) are affected by seasonal cycles, so actual trends are more accurately represented by year-over-year changes (i.e. comparing a month's sales to the amount of sales in the same month in the previous year), rather than changes from one month to the next.

Month	Closed Sales	Percent Change Year-over-Year
Year-to-Date	6,201	7.6%
September 2026	**636**	**-3.9%**
August 2026	687	5.7%
July 2026	694	11.2%
June 2026	890	26.2%
May 2026	782	-0.5%
April 2026	704	4.8%
March 2026	814	21.9%
February 2026	550	10.0%
January 2026	444	-10.8%
December 2025	612	-5.6%
November 2025	548	-13.7%
October 2025	596	26.8%
September 2025	662	24.4%



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Monthly Market Detail - September 2026
Single-Family Homes
Manatee County

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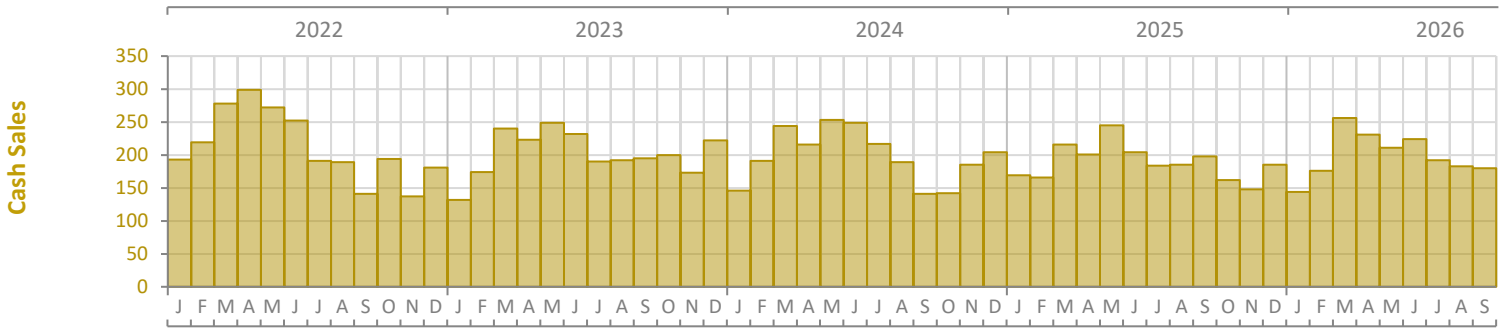
Cash Sales

The number of Closed Sales during the month in which buyers exclusively paid in cash

Economists' note : Cash Sales can be a useful indicator of the extent to which investors are participating in the market. Why? Investors are far more likely to have the funds to purchase a home available up front, whereas the typical homebuyer requires a mortgage or some other form of financing. There are, of course, many possible exceptions, so this statistic should be interpreted with care.

Month	Cash Sales	Percent Change Year-over-Year
Year-to-Date	1,797	1.6%
September 2026	**180**	**-9.1%**
August 2026	183	-1.1%
July 2026	192	4.3%
June 2026	224	9.8%
May 2026	211	-13.9%
April 2026	231	14.9%
March 2026	256	18.5%
February 2026	176	6.0%
January 2026	144	-14.8%
December 2025	185	-9.3%
November 2025	148	-20.0%
October 2025	162	14.1%
September 2025	198	40.4%

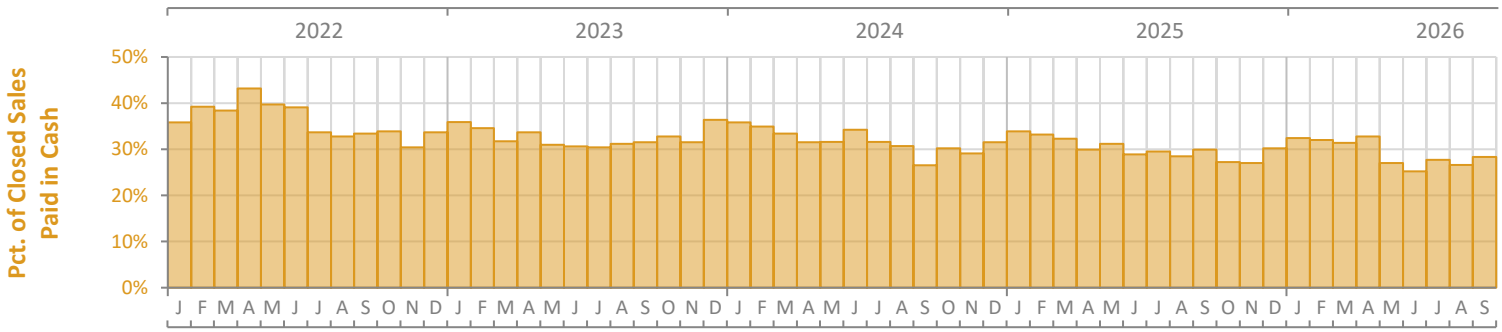


Cash Sales as a Percentage of Closed Sales

The percentage of Closed Sales during the month which were Cash Sales

Economists' note : This statistic is simply another way of viewing Cash Sales. The remaining percentages of Closed Sales (i.e. those not paid fully in cash) each month involved some sort of financing, such as mortgages, owner/seller financing, assumed loans, etc.

Month	Percent of Closed Sales Paid in Cash	Percent Change Year-over-Year
Year-to-Date	29.0%	-5.5%
September 2026	**28.3%**	**-5.4%**
August 2026	26.6%	-6.7%
July 2026	27.7%	-6.1%
June 2026	25.2%	-12.8%
May 2026	27.0%	-13.5%
April 2026	32.8%	9.7%
March 2026	31.4%	-2.8%
February 2026	32.0%	-3.6%
January 2026	32.4%	-4.4%
December 2025	30.2%	-4.1%
November 2025	27.0%	-7.2%
October 2025	27.2%	-9.9%
September 2025	29.9%	12.8%



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Monthly Market Detail - September 2026
Single-Family Homes
Manatee County

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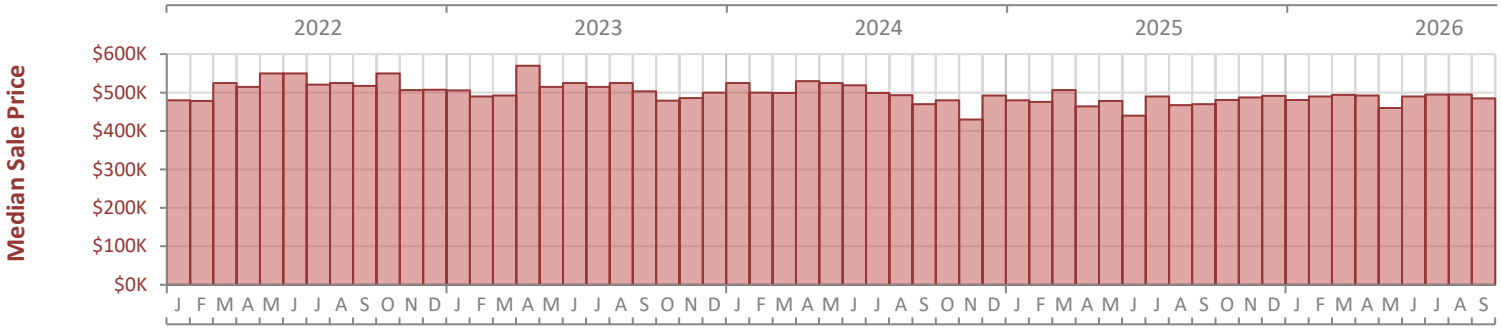
Median Sale Price

The median sale price reported for the month (i.e. 50% of sales were above and 50% of sales were below)

Economists' note : Median Sale Price is our preferred summary statistic for price activity because, unlike Average Sale Price, Median Sale Price is not sensitive to high sale prices for small numbers of homes that may not be characteristic of the market area. Keep in mind that median price trends over time are not always solely caused by changes in the general value of local real estate. Median sale price only reflects the values of the homes that *sold* each month, and the mix of the types of homes that sell can change over time.

Month	Median Sale Price	Percent Change Year-over-Year
Year-to-Date	$485,273	2.7%
September 2026	**$485,000**	**3.2%**
August 2026	$495,000	5.9%
July 2026	$495,000	1.0%
June 2026	$490,000	11.4%
May 2026	$460,000	-3.8%
April 2026	$492,500	6.1%
March 2026	$494,205	-2.4%
February 2026	$489,634	2.9%
January 2026	$480,495	0.1%
December 2025	$491,500	-0.1%
November 2025	$487,233	13.3%
October 2025	$481,000	0.2%
September 2025	$470,000	0.0%

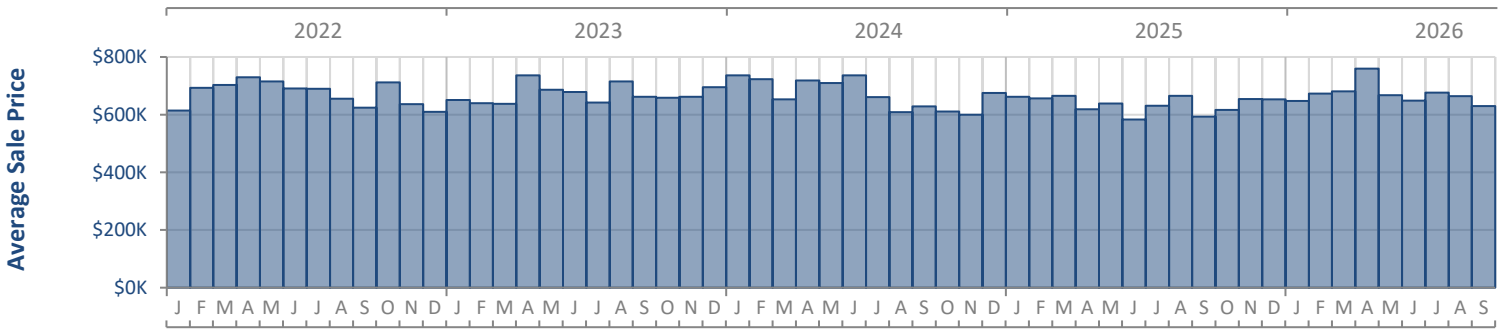


Average Sale Price

The average sale price reported for the month (i.e. total sales in dollars divided by the number of sales)

Economists' note : Usually, we prefer Median Sale Price over Average Sale Price as a summary statistic for home prices. However, Average Sale Price does have its uses—particularly when it is analyzed alongside the Median Sale Price. For one, the relative difference between the two statistics can provide some insight into the market for higher-end homes in an area.

Month	Average Sale Price	Percent Change Year-over-Year
Year-to-Date	$672,705	6.2%
September 2026	**$629,444**	**6.1%**
August 2026	$663,878	-0.3%
July 2026	$675,943	7.1%
June 2026	$648,560	11.2%
May 2026	$667,503	4.5%
April 2026	$760,094	22.9%
March 2026	$680,646	2.4%
February 2026	$673,021	2.5%
January 2026	$647,324	-2.3%
December 2025	$653,048	-3.3%
November 2025	$653,655	9.0%
October 2025	$616,842	1.0%
September 2025	$593,139	-5.6%



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Single-Family Homes
Manatee County

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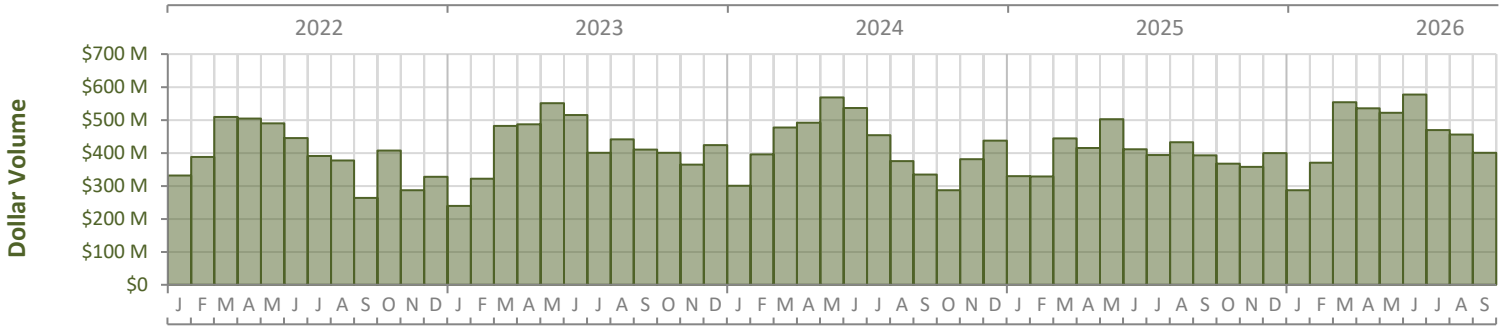
Dollar Volume

The sum of the sale prices for all sales which closed during the month

Economists' note : Dollar Volume is simply the sum of all sale prices in a given time period, and can quickly be calculated by multiplying Closed Sales by Average Sale Price. It is a strong indicator of the health of the real estate industry in a market, and is of particular interest to real estate professionals, investors, analysts, and government agencies. Potential home sellers and home buyers, on the other hand, will likely be better served by paying attention to trends in the two components of Dollar Volume (i.e. sales and prices) individually.

Month	Dollar Volume	Percent Change Year-over-Year
Year-to-Date	$4.2 Billion	14.3%
September 2026	**$400.3 Million**	**2.0%**
August 2026	$456.1 Million	5.4%
July 2026	$469.1 Million	19.1%
June 2026	$577.2 Million	40.3%
May 2026	$522.0 Million	4.0%
April 2026	$535.1 Million	28.8%
March 2026	$554.0 Million	24.7%
February 2026	$370.2 Million	12.7%
January 2026	$287.4 Million	-12.9%
December 2025	$399.7 Million	-8.7%
November 2025	$358.2 Million	-5.9%
October 2025	$367.6 Million	28.1%
September 2025	$392.7 Million	17.5%

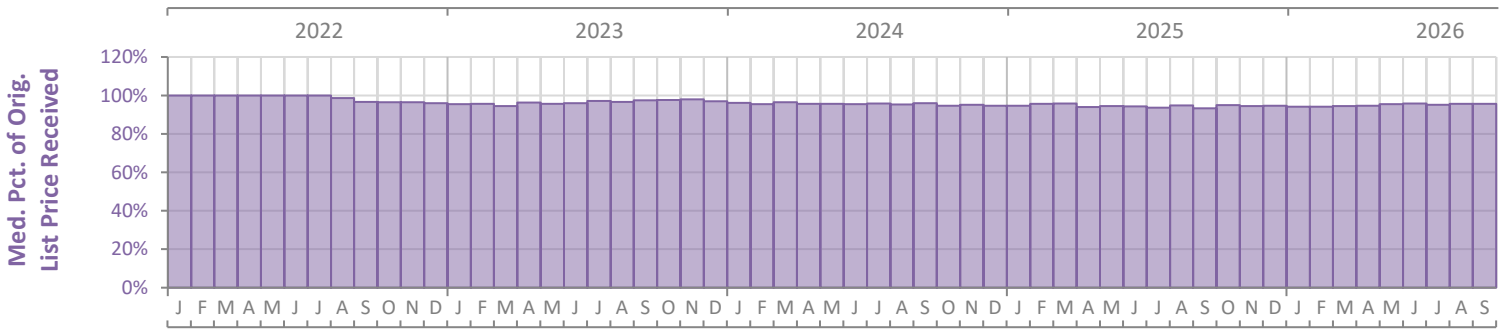


Median Percent of Original List Price Received

The median of the sale price (as a percentage of the original list price) across all properties selling during the month

Economists' note : The Median Percent of Original List Price Received is useful as an indicator of market recovery, since it typically rises as buyers realize that the market may be moving away from them and they need to match the selling price (or better it) in order to get a contract on the house. This is usually the last measure to indicate a market has shifted from down to up, so it is what we would call a *lagging* indicator.

Month	Med. Pct. of Orig. List Price Received	Percent Change Year-over-Year
Year-to-Date	95.1%	0.6%
September 2026	**95.7%**	**2.6%**
August 2026	95.6%	0.8%
July 2026	95.2%	1.6%
June 2026	95.8%	1.6%
May 2026	95.4%	1.1%
April 2026	94.6%	0.6%
March 2026	94.4%	-1.5%
February 2026	94.2%	-1.5%
January 2026	94.2%	-0.5%
December 2025	94.6%	0.0%
November 2025	94.5%	-0.6%
October 2025	94.9%	0.2%
September 2025	93.3%	-2.8%



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Single-Family Homes
Manatee County

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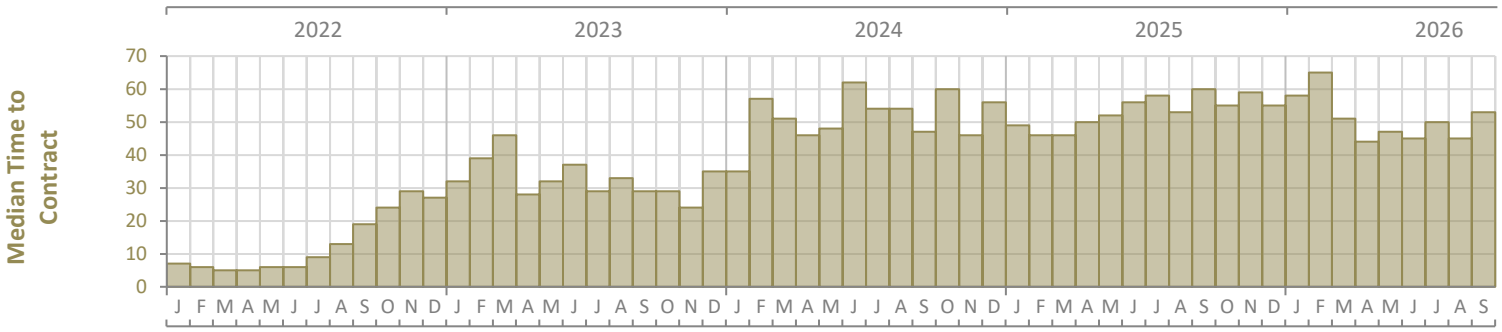
Median Time to Contract

The median number of days between the listing date and contract date for all Closed Sales during the month

Economists' note : Like Time to Sale, Time to Contract is a measure of the length of the home selling process calculated for sales which closed during the month. The difference is that Time to Contract measures the number of days between the initial listing of a property and the signing of the contract which eventually led to the closing of the sale. When the gap between Median Time to Contract and Median Time to Sale grows, it is usually a sign of longer closing times and/or declining numbers of cash sales.

Month	Median Time to Contract	Percent Change Year-over-Year
Year-to-Date	49 Days	-12.5%
September 2026	**53 Days**	**-11.7%**
August 2026	45 Days	-15.1%
July 2026	50 Days	-13.8%
June 2026	45 Days	-19.6%
May 2026	47 Days	-9.6%
April 2026	44 Days	-12.0%
March 2026	51 Days	10.9%
February 2026	65 Days	41.3%
January 2026	58 Days	18.4%
December 2025	55 Days	-1.8%
November 2025	59 Days	28.3%
October 2025	55 Days	-8.3%
September 2025	60 Days	27.7%

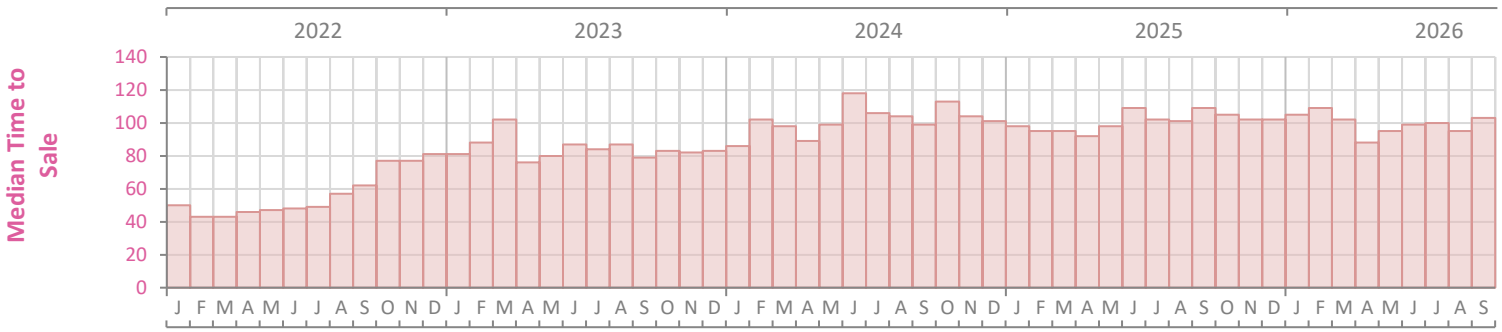


Median Time to Sale

The median number of days between the listing date and closing date for all Closed Sales during the month

Economists' note : Time to Sale is a measure of the length of the home selling process, calculated as the number of days between the initial listing of a property and the closing of the sale. *Median* Time to Sale is the amount of time the "middle" property selling this month was on the market. That is, 50% of homes selling this month took *less* time to sell, and 50% of homes took *more* time to sell. Median Time to Sale gives a more accurate picture than Average Time to Sale, which can be skewed upward by small numbers of properties taking an abnormally long time to sell.

Month	Median Time to Sale	Percent Change Year-over-Year
Year-to-Date	99 Days	-2.9%
September 2026	**103 Days**	**-5.5%**
August 2026	95 Days	-5.9%
July 2026	100 Days	-2.0%
June 2026	99 Days	-9.2%
May 2026	95 Days	-3.1%
April 2026	88 Days	-4.3%
March 2026	102 Days	7.4%
February 2026	109 Days	14.7%
January 2026	105 Days	7.1%
December 2025	102 Days	1.0%
November 2025	102 Days	-1.9%
October 2025	105 Days	-7.1%
September 2025	109 Days	10.1%



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Single-Family Homes
Manatee County

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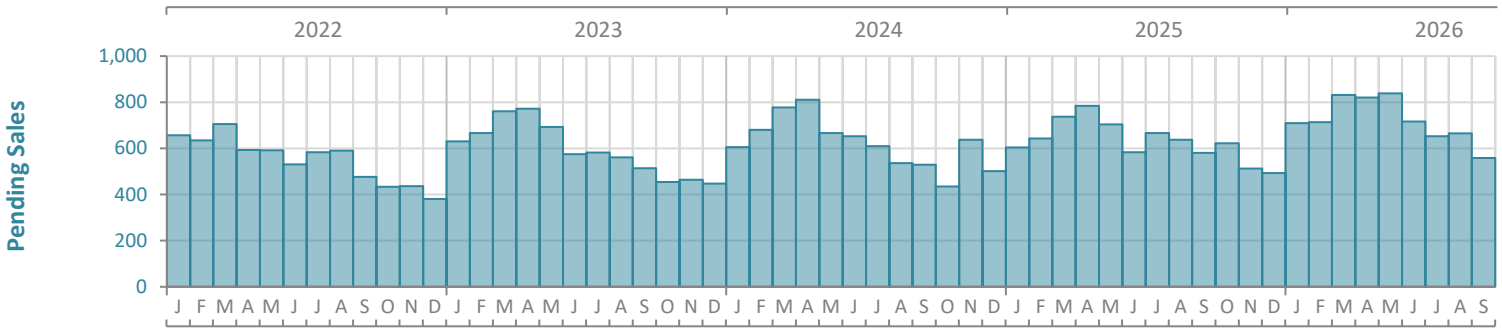
New Pending Sales

The number of listed properties that went under contract during the month

Economists' note : Because of the typical length of time it takes for a sale to close, economists consider Pending Sales to be a decent indicator of potential future Closed Sales. It is important to bear in mind, however, that not all Pending Sales will be closed successfully. So, the effectiveness of Pending Sales as a future indicator of Closed Sales is susceptible to changes in market conditions such as the availability of financing for homebuyers and the inventory of distressed properties for sale.

Month	New Pending Sales	Percent Change Year-over-Year
Year-to-Date	6,507	9.6%
September 2026	**559**	**-3.6%**
August 2026	665	4.4%
July 2026	653	-2.0%
June 2026	716	22.8%
May 2026	839	19.2%
April 2026	821	4.6%
March 2026	831	12.8%
February 2026	714	11.0%
January 2026	709	17.4%
December 2025	493	-1.6%
November 2025	513	-19.5%
October 2025	622	43.0%
September 2025	580	9.6%

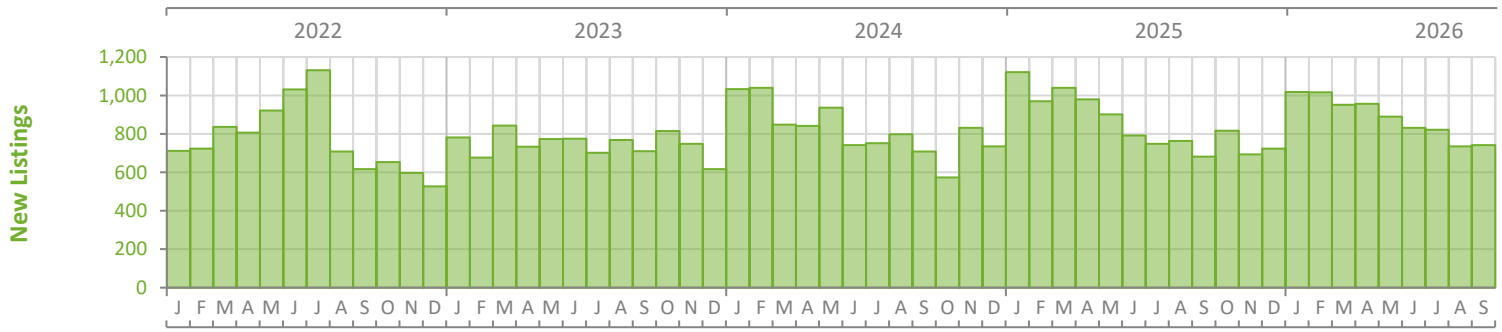


New Listings

The number of properties put onto the market during the month

Economists' note : New Listings tend to rise in delayed response to increasing prices, so they are often seen as a lagging indicator of market health. As prices rise, potential sellers raise their estimations of value—and in the most recent cycle, rising prices have freed up many potential sellers who were previously underwater on their mortgages. Note that in our calculations, we take care to not include properties that were recently taken off the market and quickly relisted, since these are not really *new* listings.

Month	New Listings	Percent Change Year-over-Year
Year-to-Date	7,959	-0.5%
September 2026	**741**	**8.8%**
August 2026	735	-3.7%
July 2026	821	9.6%
June 2026	831	4.9%
May 2026	889	-1.4%
April 2026	957	-2.2%
March 2026	951	-8.6%
February 2026	1,016	4.7%
January 2026	1,018	-9.2%
December 2025	724	-1.5%
November 2025	693	-16.7%
October 2025	816	42.4%
September 2025	681	-3.9%



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Monthly Market Detail - September 2026
Single-Family Homes
Manatee County

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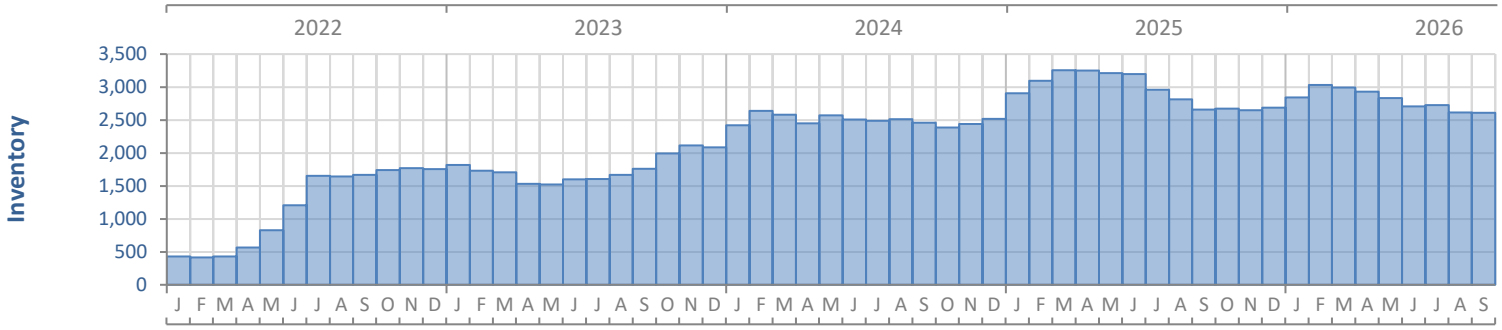
Inventory (Active Listings)

The number of property listings active at the end of the month

Economists' note : There are a number of ways to define and calculate Inventory. Our method is to simply count the number of active listings on the last day of the month, and hold this number to compare with the same month the following year. Inventory rises when New Listings are outpacing the number of listings that go off-market (regardless of whether they actually sell). Likewise, it falls when New Listings aren't keeping up with the rate at which homes are going off-market.

Month	Inventory	Percent Change Year-over-Year
YTD (Monthly Avg)	2,809	-7.6%
September 2026	**2,610**	**-1.7%**
August 2026	2,616	-7.0%
July 2026	2,724	-7.9%
June 2026	2,706	-15.3%
May 2026	2,832	-11.8%
April 2026	2,929	-9.9%
March 2026	2,991	-8.1%
February 2026	3,031	-2.1%
January 2026	2,843	-2.2%
December 2025	2,687	6.7%
November 2025	2,647	8.4%
October 2025	2,671	12.0%
September 2025	2,656	7.9%

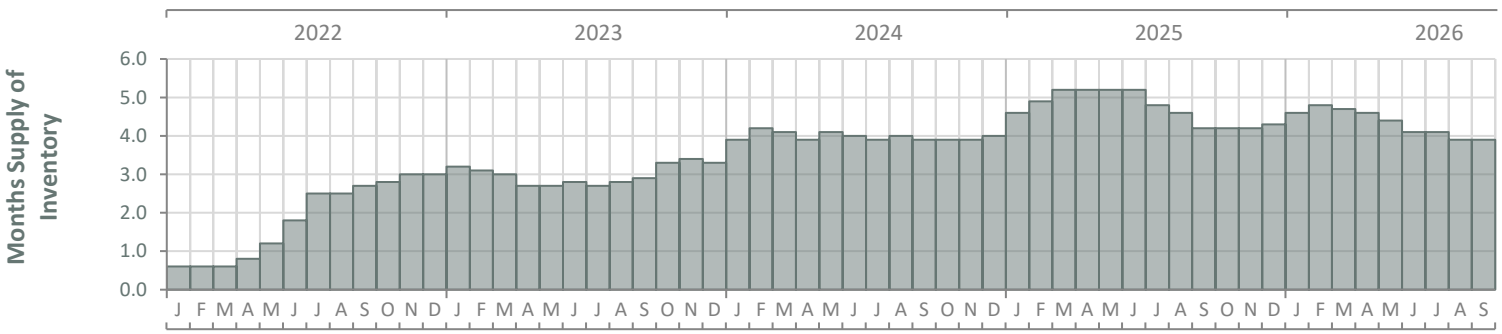


Months Supply of Inventory

An estimate of the number of months it will take to deplete the current Inventory given recent sales rates

Economists' note : MSI is a useful indicator of market conditions. The benchmark for a balanced market (favoring neither buyer nor seller) is 5.5 months of inventory. Anything higher is traditionally a buyers' market, and anything lower is a sellers' market. There is no single accepted way of calculating MSI. A common method is to divide current Inventory by the most recent month's Closed Sales count, but this count is a usually poor predictor of future Closed Sales due to seasonal cycles. To eliminate seasonal effects, we use the 12-month average of monthly Closed Sales instead.

Month	Months Supply	Percent Change Year-over-Year
YTD (Monthly Avg)	4.3	-12.2%
September 2026	**3.9**	**-7.1%**
August 2026	3.9	-15.2%
July 2026	4.1	-14.6%
June 2026	4.1	-21.2%
May 2026	4.4	-15.4%
April 2026	4.6	-11.5%
March 2026	4.7	-9.6%
February 2026	4.8	-2.0%
January 2026	4.6	0.0%
December 2025	4.3	7.5%
November 2025	4.2	7.7%
October 2025	4.2	7.7%
September 2025	4.2	7.7%



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Single-Family Homes
Manatee County

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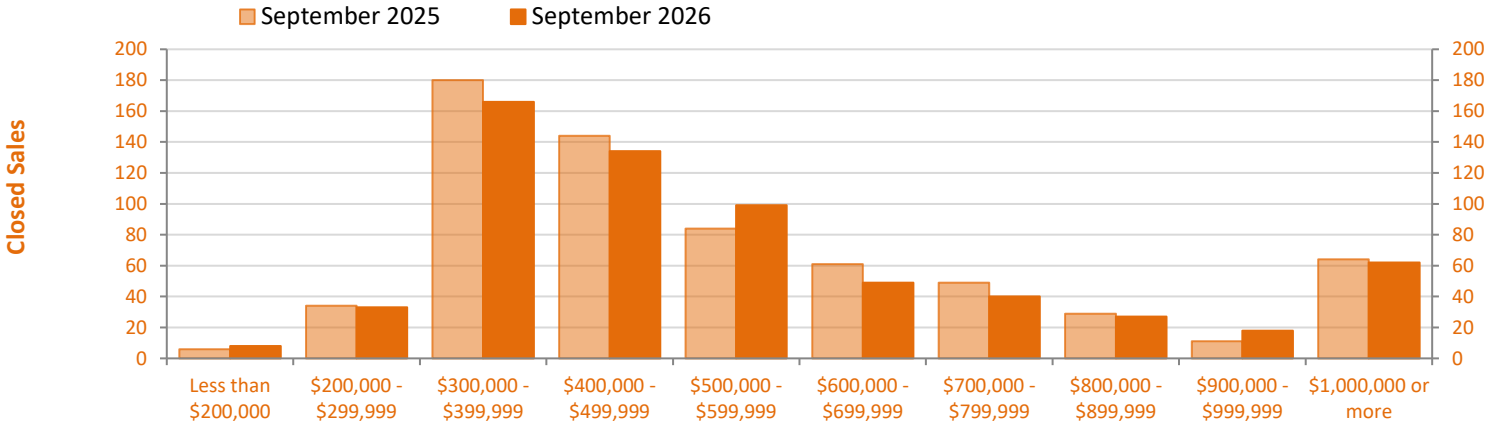
Closed Sales by Sale Price

The number of sales transactions which closed during the month

Economists' note: Closed Sales are one of the simplest—yet most important—indicators for the residential real estate market. When comparing Closed Sales across markets of different sizes, we recommend comparing the percent changes in sales rather than the number of sales. Closed Sales (and many other market metrics) are affected by seasonal cycles, so actual trends are more accurately represented by year-over-year changes (i.e. comparing a month's sales to the amount of sales in the same month in the previous year), rather than changes from one month to the next.

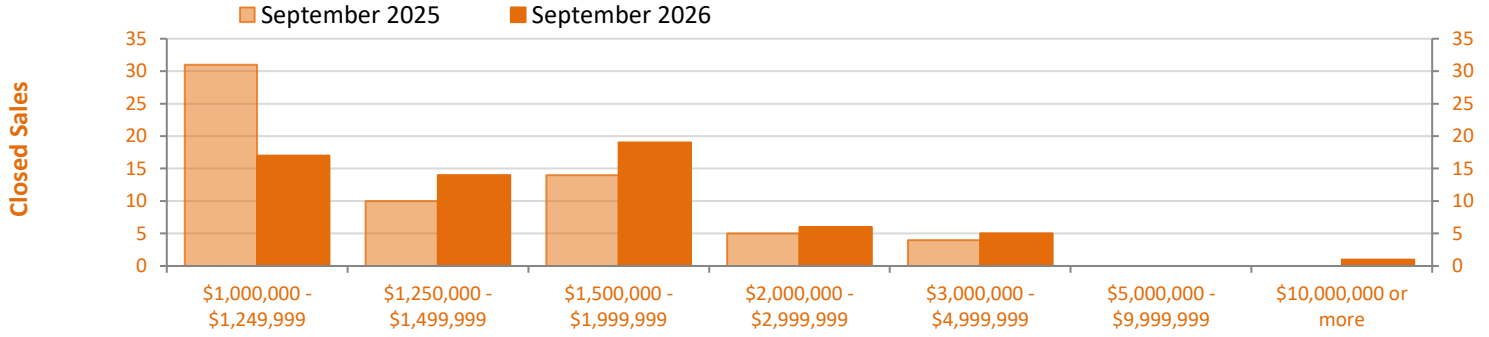
Sale Price	Closed Sales	Percent Change Year-over-Year
Less than $200,000	8	33.3%
$200,000 - $299,999	33	-2.9%
$300,000 - $399,999	166	-7.8%
$400,000 - $499,999	134	-6.9%
$500,000 - $599,999	99	17.9%
$600,000 - $699,999	49	-19.7%
$700,000 - $799,999	40	-18.4%
$800,000 - $899,999	27	-6.9%
$900,000 - $999,999	18	63.6%
$1,000,000 or more	62	-3.1%



Million Dollar Spotlight

Closed Sales by Sale Price for properties selling for $1,000,000 or more

Sale Price	Closed Sales	Percent Change Year-over-Year
$1,000,000 - $1,249,999	17	-45.2%
$1,250,000 - $1,499,999	14	40.0%
$1,500,000 - $1,999,999	19	35.7%
$2,000,000 - $2,999,999	6	20.0%
$3,000,000 - $4,999,999	5	25.0%
$5,000,000 - $9,999,999	0	N/A
$10,000,000 or more	1	N/A



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Monthly Market Detail - September 2026
Single-Family Homes
Manatee County

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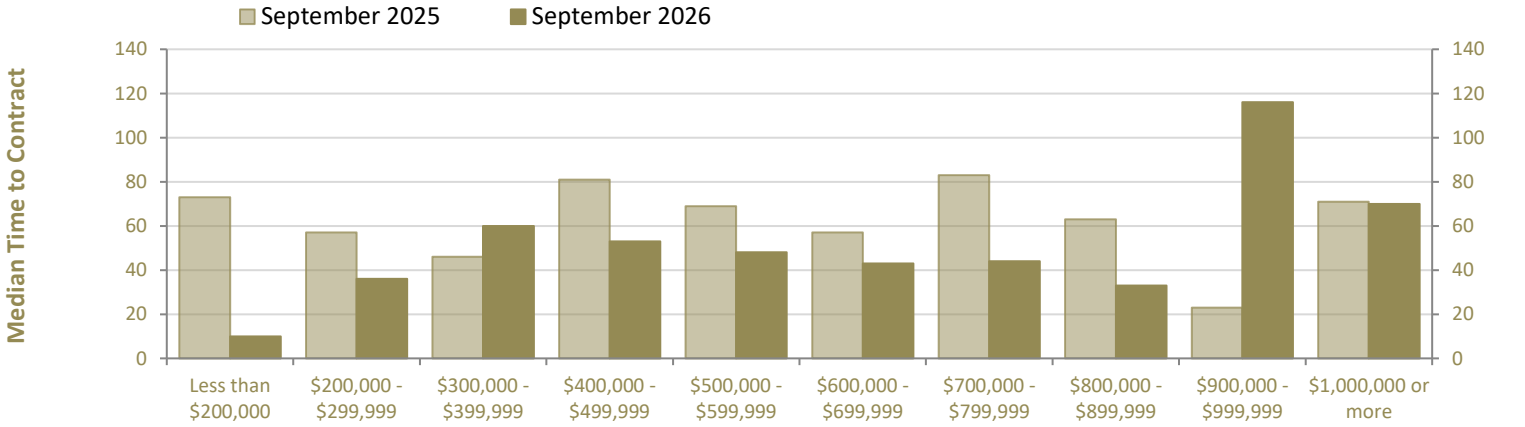
Median Time to Contract by Sale Price

The median number of days between the listing date and contract date for all Closed Sales during the month

Economists' note : Like Time to Sale, Time to Contract is a measure of the length of the home selling process calculated for sales which closed during the month. The difference is that Time to Contract measures the number of days between the initial listing of a property and the signing of the contract which eventually led to the closing of the sale. When the gap between Median Time to Contract and Median Time to Sale grows, it is usually a sign of longer closing times and/or declining numbers of cash sales.

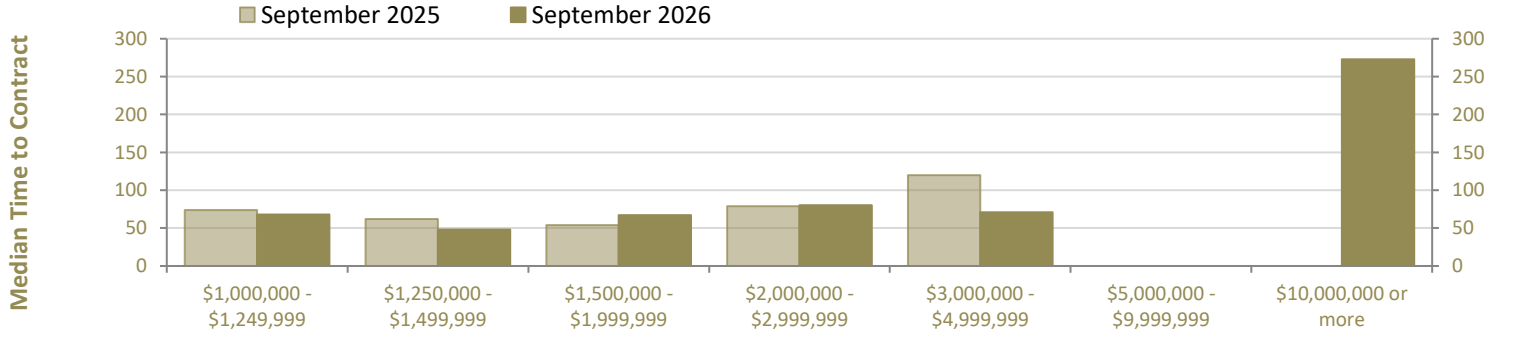
Sale Price	Median Time to Contract	Percent Change Year-over-Year
Less than $200,000	10 Days	-86.3%
$200,000 - $299,999	36 Days	-36.8%
$300,000 - $399,999	60 Days	30.4%
$400,000 - $499,999	53 Days	-34.6%
$500,000 - $599,999	48 Days	-30.4%
$600,000 - $699,999	43 Days	-24.6%
$700,000 - $799,999	44 Days	-47.0%
$800,000 - $899,999	33 Days	-47.6%
$900,000 - $999,999	116 Days	404.3%
$1,000,000 or more	70 Days	-1.4%



Million Dollar Spotlight

Median Time to Contract by Sale Price for properties selling for $1,000,000 or more

Sale Price	Median Time to Contract	Percent Change Year-over-Year
$1,000,000 - $1,249,999	68 Days	-8.1%
$1,250,000 - $1,499,999	48 Days	-22.6%
$1,500,000 - $1,999,999	67 Days	24.1%
$2,000,000 - $2,999,999	80 Days	1.3%
$3,000,000 - $4,999,999	71 Days	-40.8%
$5,000,000 - $9,999,999	(No Sales)	N/A
$10,000,000 or more	273 Days	N/A



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Monthly Market Detail - September 2026
Single-Family Homes
Manatee County

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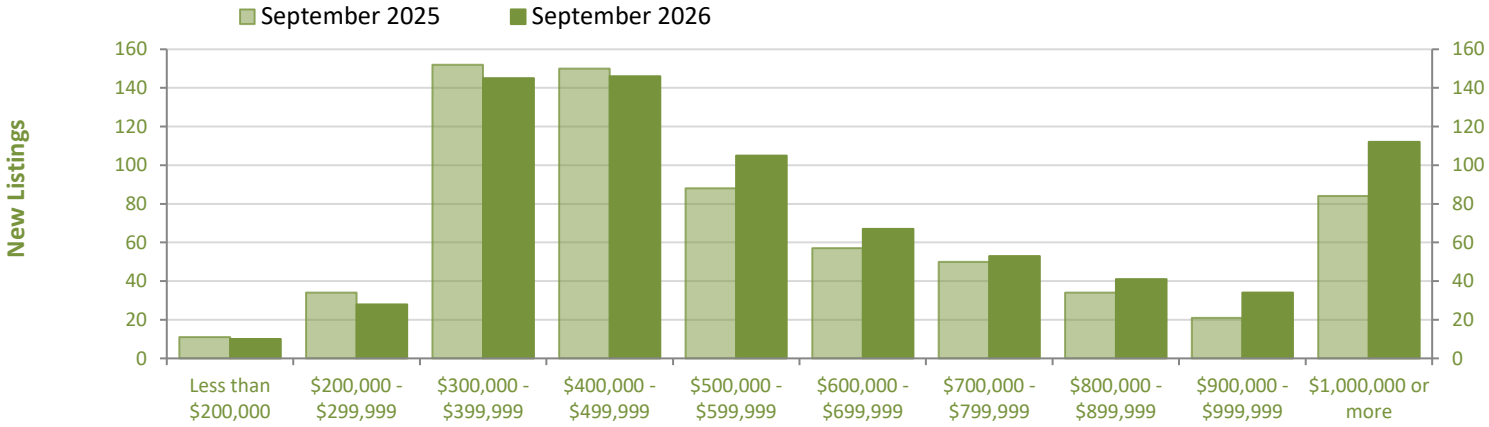
New Listings by Initial Listing Price

The number of properties put onto the market during the month

Economists' note: New Listings tend to rise in delayed response to increasing prices, so they are often seen as a lagging indicator of market health. As prices rise, potential sellers raise their estimations of value—and in the most recent cycle, rising prices have freed up many potential sellers who were previously underwater on their mortgages. Note that in our calculations, we take care to not include properties that were recently taken off the market and quickly relisted, since these are not really *new* listings.

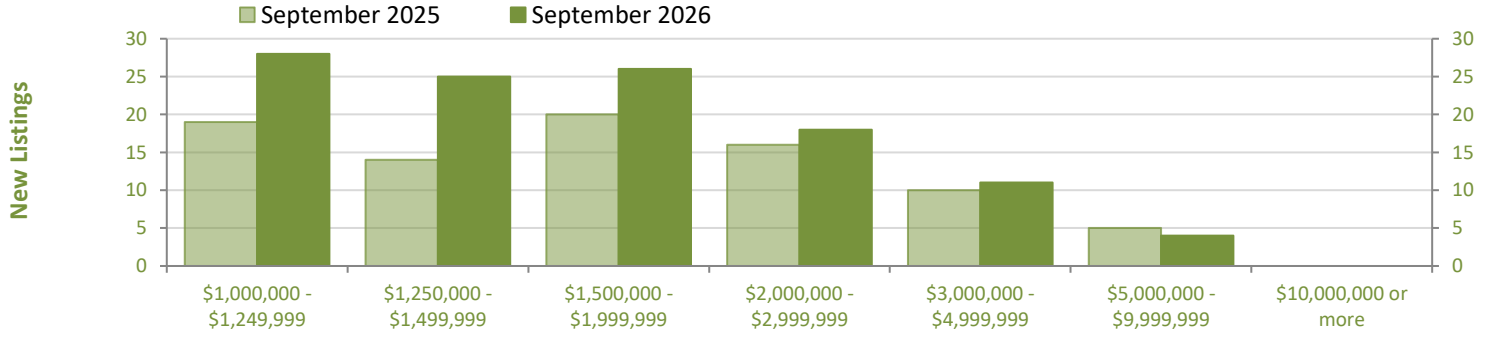
Initial Listing Price	New Listings	Percent Change Year-over-Year
Less than $200,000	10	-9.1%
$200,000 - $299,999	28	-17.6%
$300,000 - $399,999	145	-4.6%
$400,000 - $499,999	146	-2.7%
$500,000 - $599,999	105	19.3%
$600,000 - $699,999	67	17.5%
$700,000 - $799,999	53	6.0%
$800,000 - $899,999	41	20.6%
$900,000 - $999,999	34	61.9%
$1,000,000 or more	112	33.3%



Million Dollar Spotlight

New Listings by Initial Listing Price for properties listed for $1,000,000 or more

Initial Listing Price	New Listings	Percent Change Year-over-Year
$1,000,000 - $1,249,999	28	47.4%
$1,250,000 - $1,499,999	25	78.6%
$1,500,000 - $1,999,999	26	30.0%
$2,000,000 - $2,999,999	18	12.5%
$3,000,000 - $4,999,999	11	10.0%
$5,000,000 - $9,999,999	4	-20.0%
$10,000,000 or more	0	N/A



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Monthly Market Detail - September 2026
Single-Family Homes
Manatee County

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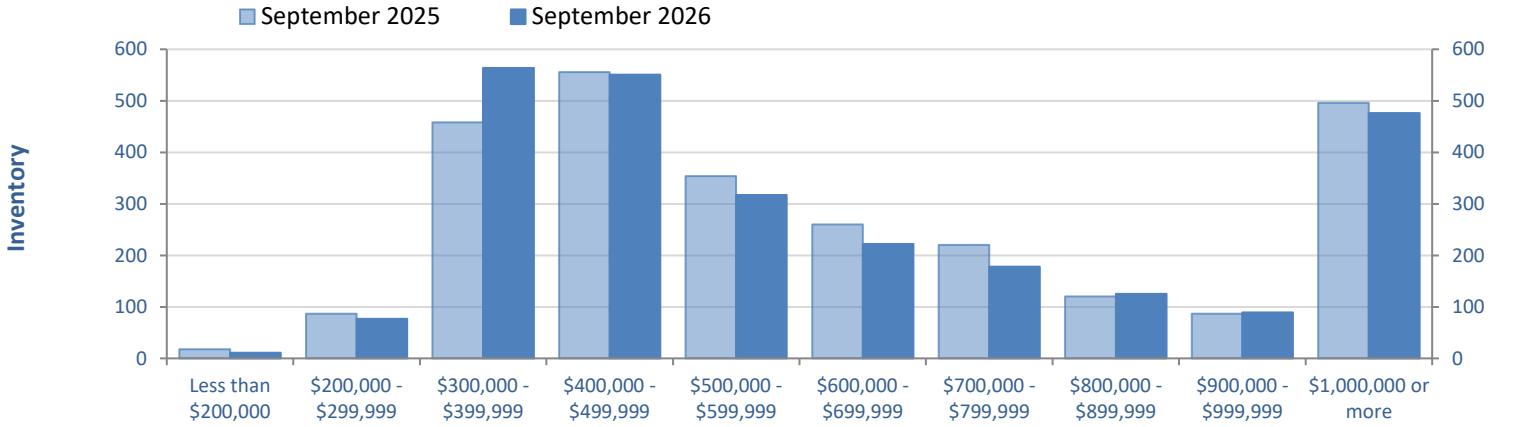
Inventory by Current Listing Price

The number of property listings active at the end of the month

Economists' note : There are a number of ways to define and calculate Inventory. Our method is to simply count the number of active listings on the last day of the month, and hold this number to compare with the same month the following year. Inventory rises when New Listings are outpacing the number of listings that go off-market (regardless of whether they actually sell). Likewise, it falls when New Listings aren't keeping up with the rate at which homes are going off-market.

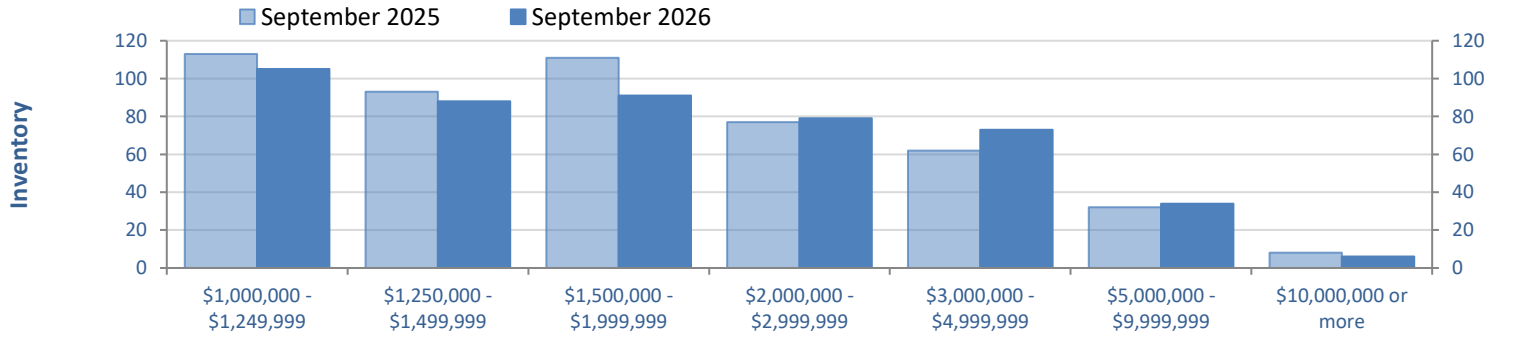
Current Listing Price	Inventory	Percent Change Year-over-Year
Less than $200,000	11	-38.9%
$200,000 - $299,999	77	-11.5%
$300,000 - $399,999	564	23.1%
$400,000 - $499,999	551	-0.9%
$500,000 - $599,999	317	-10.5%
$600,000 - $699,999	222	-14.6%
$700,000 - $799,999	178	-19.1%
$800,000 - $899,999	125	4.2%
$900,000 - $999,999	89	2.3%
$1,000,000 or more	476	-4.0%



Million Dollar Spotlight

Inventory by Current Listing Price for properties listed for $1,000,000 or more

Current Listing Price	Inventory	Percent Change Year-over-Year
$1,000,000 - $1,249,999	105	-7.1%
$1,250,000 - $1,499,999	88	-5.4%
$1,500,000 - $1,999,999	91	-18.0%
$2,000,000 - $2,999,999	79	2.6%
$3,000,000 - $4,999,999	73	17.7%
$5,000,000 - $9,999,999	34	6.3%
$10,000,000 or more	6	-25.0%



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Monthly Distressed Market - September 2026
Single-Family Homes
Manatee County

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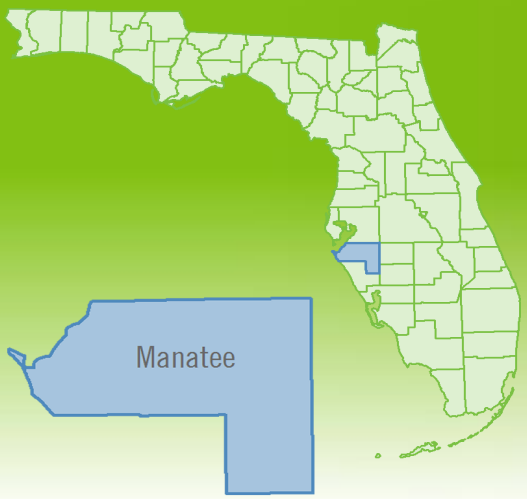
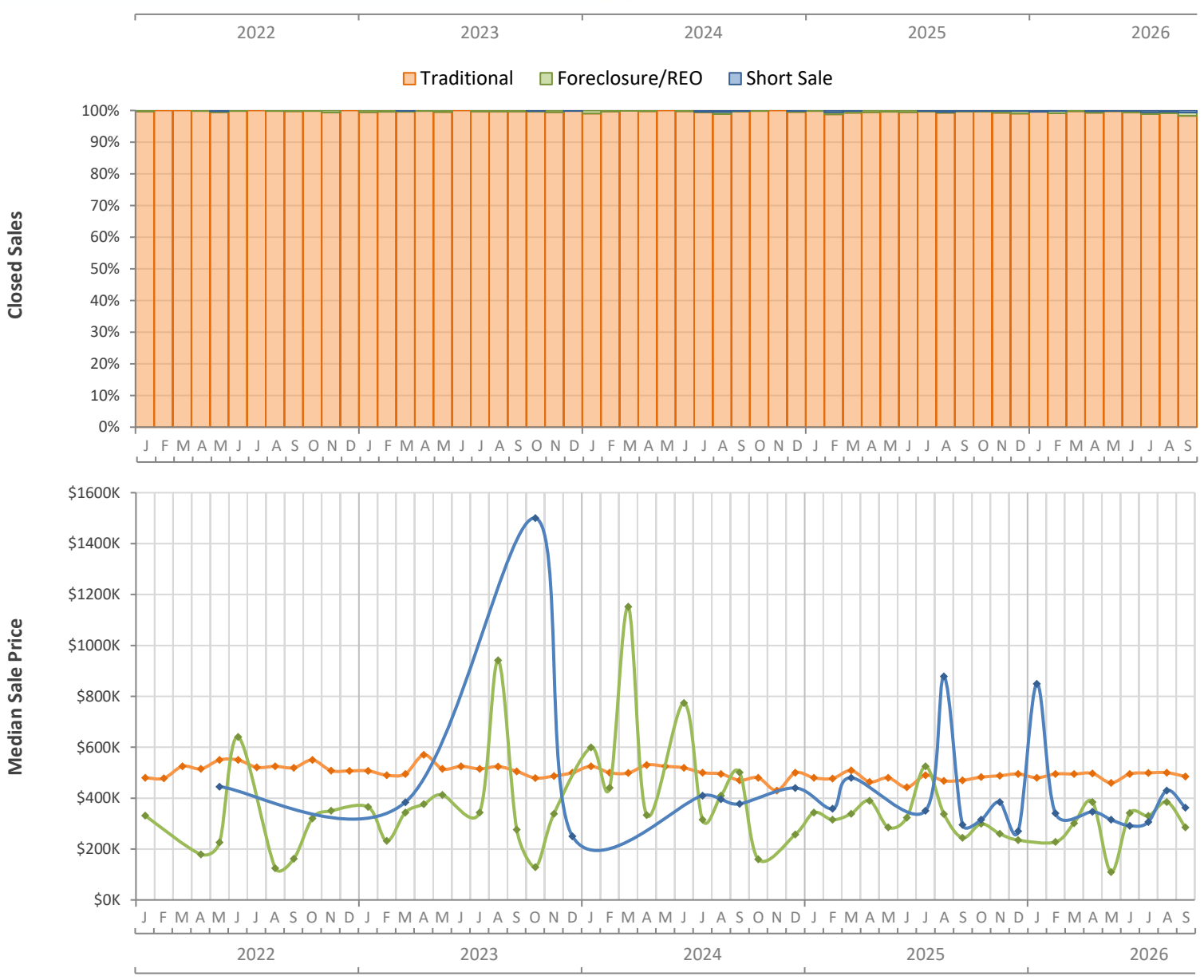


		September 2026	September 2025	Percent Change Year-over-Year
Traditional	Closed Sales	625	660	-5.3%
	Median Sale Price	$485,000	$470,000	3.2%
Foreclosure/REO	Closed Sales	7	1	600.0%
	Median Sale Price	$285,000	$244,176	16.7%
Short Sale	Closed Sales	4	1	300.0%
	Median Sale Price	$362,500	$295,000	22.9%



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