

TAMPA BAY MARKET INTELLIGENCE · MONTHLY REPORT

April 2026

MIDDLETON
TAMPA BAY

Single-family and condominium market analysis for Hillsborough, Pinellas, Pasco, Manatee and Sarasota counties.

DATA RELEASED FRIDAY, MAY 15, 2026

The month *in numbers.*

4,637
SINGLE-FAMILY SALES
down 1.8% year over year

$2.95B
SINGLE-FAMILY VOLUME
up 12.2% year over year

16,868
ACTIVE SF LISTINGS
down 15.7% year over year

1,913
CONDO AND TOWNHOME SALES
up 8.3% year over year

KEY TAKEAWAYS

- Single-family closings across the five counties totaled 4,637, down 1.8 percent from a year earlier, with $2.95 billion in dollar volume.
- Manatee posted the strongest single-family median price change at +6.1%, while Pasco posted the weakest at minus 3.9%.
- Single-family supply ranged from 3.7 months in Hillsborough to 4.7 months in Sarasota.
- Condominium and townhome closings totaled 1,913, up 8.3 percent from a year earlier, and condo supply ranged from 5.6 to 7.8 months.
- Active single-family inventory stood at 16,868 listings, down 15.7 percent from a year earlier.

IN THIS REPORT

Analyst's Note	03
Single-Family Scorecard	04
Condominium Scorecard	05
Price and Supply	06
Pace of the Market	07
Thirteen-Month Price Trends	08
County Reports	09
Price Tiers	19
The Luxury Market	20
Cash, Distress and Momentum	21
Methodology and Definitions	22

THE FIVE-COUNTY REGION

SEGMENT	CLOSED SALES	DOLLAR VOLUME	AVERAGE PRICE	NEW LISTINGS	NEW PENDING	ACTIVE LISTINGS	CASH SHARE
Single-Family	4,637 −1.8%	$2.95 B +12.2%	$635,972 +14.3%	6,264 −12.7%	5,319 +6.2%	16,868 −15.7%	28%
Condo and Townhome	1,913 +8.3%	$853.0 M +19.4%	$445,896 +10.2%	2,661 −6.6%	1,929 +17.8%	10,853 −8.8%	57%

Regional totals sum the five counties. The regional average price equals total dollar volume divided by total closed sales. County medians cannot be combined into a regional median, so medians are reported county by county.



ANALYST'S NOTE

Reading April *with care.*

Monthly numbers move. A single month can be shaped by a few large closings, a holiday or a storm, so I read each report against the same month a year earlier and against the trend of the past thirteen months.

In April, regional single-family sales were down 1.8 percent from a year earlier and the regional average price was up 14.3 percent from a year earlier. Active inventory was down 15.7 percent on the year.

WHAT STOOD OUT

Manatee led the region in single-family price growth at +6.1% year over year. Hillsborough had the tightest supply at 3.7 months. Homes moved fastest in Hillsborough, at a median 34 days to contract, and slowest in Sarasota, at 46 days.

Negotiating room varied as well. Sellers received a median 96.9% of original list price in Hillsborough and 94.3% in Sarasota.

WHAT IT MEANS

For sellers, pricing to the most recent comparable sales matters more than ever. The gap between original list price and sale price tells you how much the market is willing to negotiate in your county.

For buyers, condominium supply above six months in Pinellas, Pasco, Manatee and Sarasota points to real negotiating leverage in that segment.

Data tells you where the market is. Strategy decides what you do about it.

MARK ALLEN MIDDLETON · REALTOR® · COMPASS

Single-Family Homes, *county by county.*

Each figure shows the April 2026 value with its change from April 2025 beneath it. Days to contract is the median number of days from listing to accepted contract.

COUNTY	CLOSED SALES	MEDIAN PRICE	AVERAGE PRICE	DAYS TO CONTRACT	% OF ORIGINAL LIST	ACTIVE LISTINGS	MONTHS SUPPLY	CASH SHARE
Hillsborough	1,299 −2.0%	$420,000 +0.7%	$561,951 +3.9%	34 +9.7%	96.9% −0.1%	4,433 −10.6%	3.7 −7.5%	18%
Pinellas	983 +3.9%	$469,900 +1.1%	$677,464 +13.6%	35 +25.0%	94.9% 0.0%	3,198 −22.1%	3.7 −26.0%	33%
Pasco	827 −13.8%	$365,000 −3.9%	$419,275 +1.5%	43 +10.3%	96.5% −0.4%	3,050 −6.0%	3.8 −2.6%	20%
Manatee	704 +4.8%	$492,500 +6.1%	$760,094 +22.9%	44 −12.0%	94.6% +0.6%	2,929 −9.9%	4.6 −11.5%	33%
Sarasota	824 +0.9%	$490,000 +4.3%	$814,685 +24.6%	46 +7.0%	94.3% +1.3%	3,258 −26.8%	4.7 −32.9%	44%
Region	4,637 −1.8%	By county	$635,972 +14.3%	By county	By county	16,868 −15.7%	By county	28%

6,264
NEW LISTINGS
down 12.7% year over year, five counties

5,319
NEW PENDING SALES
up 6.2% year over year, five counties

15,897
CLOSED SALES YEAR TO DATE
January through April, five counties

YEAR TO DATE, JANUARY THROUGH APRIL

4,434
HILLSBOROUGH
down 3.1% in closed sales

3,246
PINELLAS
down 6.1% in closed sales

2,843
PASCO
down 12.5% in closed sales

2,512
MANATEE
up 7.4% in closed sales

2,862
SARASOTA
up 4.3% in closed sales

Months supply divides active inventory by the twelve-month average of monthly closed sales, as published by Florida Realtors®, whose economists cite 5.5 months as the benchmark for a balanced market. We describe readings under 5 months as seller-leaning, 5 to 6 months as near balance and above 6 months as buyer-leaning.

Condominiums and Townhomes, *county by county.*

Each figure shows the April 2026 value with its change from April 2025 beneath it. Days to contract is the median number of days from listing to accepted contract.

COUNTY	CLOSED SALES	MEDIAN PRICE	AVERAGE PRICE	DAYS TO CONTRACT	% OF ORIGINAL LIST	ACTIVE LISTINGS	MONTHS SUPPLY	CASH SHARE
Hillsborough	325 −14.9%	$275,000 −6.1%	$364,574 +0.9%	48 +33.3%	94.7% −1.4%	1,787 −14.4%	5.6 −5.1%	40%
Pinellas	679 +27.2%	$282,500 +0.9%	$526,172 +27.6%	59 +40.5%	91.7% −1.5%	4,132 −3.5%	7.8 −9.3%	58%
Pasco	157 −22.3%	$260,900 −4.2%	$243,023 −8.7%	63 +53.7%	94.7% −2.1%	1,052 −0.8%	6.3 +37.0%	43%
Manatee	307 +12.5%	$320,000 +6.6%	$335,660 −2.3%	60 −4.8%	93.2% +0.4%	1,582 −12.9%	6.9 −15.9%	59%
Sarasota	445 +18.7%	$337,500 −0.6%	$530,268 −4.6%	67 +9.8%	91.1% +1.4%	2,300 −13.3%	7.7 −19.8%	70%
Region	1,913 +8.3%	By county	$445,896 +10.2%	By county	By county	10,853 −8.8%	By county	57%

2,661

NEW LISTINGS

down 6.6% year over year, five counties

1,929

NEW PENDING SALES

up 17.8% year over year, five counties

6,705

CLOSED SALES YEAR TO DATE

January through April, five counties

YEAR TO DATE, JANUARY THROUGH APRIL

1,173
HILLSBOROUGH
down 10.3% in closed sales

2,465
PINELLAS
up 26.4% in closed sales

565
PASCO
down 31.1% in closed sales

1,016
MANATEE
up 2.0% in closed sales

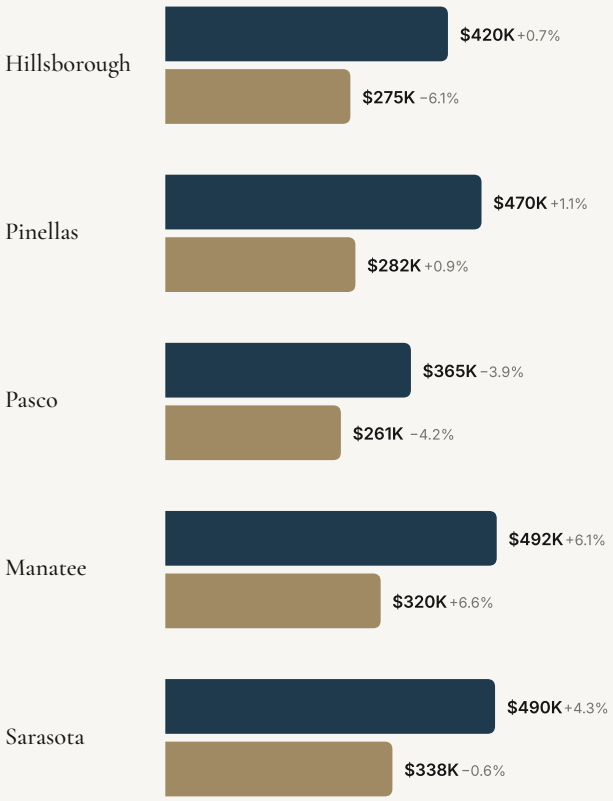
1,486
SARASOTA
up 26.1% in closed sales

Months supply divides active inventory by the twelve-month average of monthly closed sales, as published by Florida Realtors®, whose economists cite 5.5 months as the benchmark for a balanced market. We describe readings under 5 months as seller-leaning, 5 to 6 months as near balance and above 6 months as buyer-leaning.

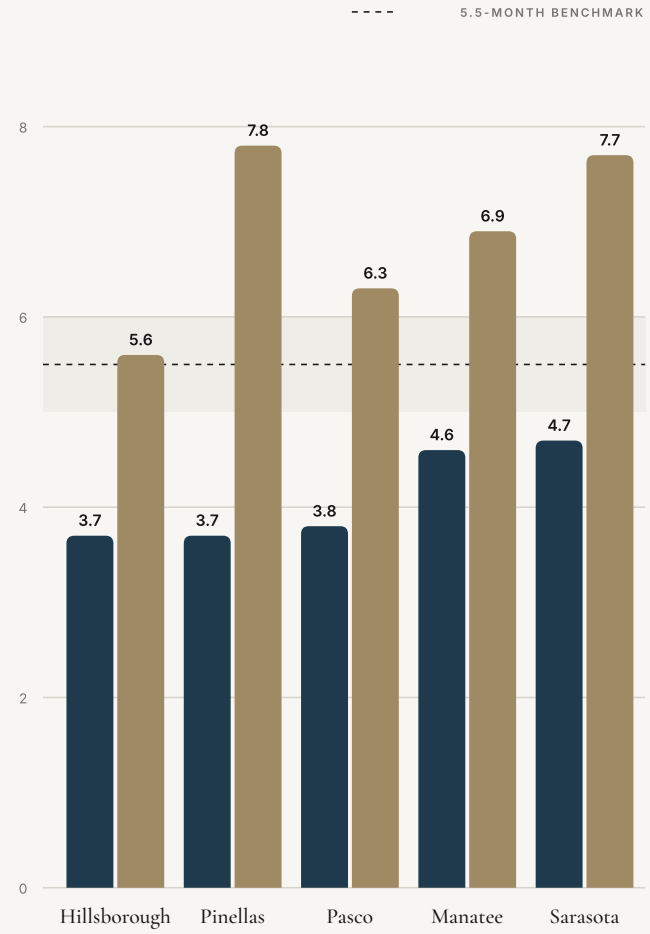
Where values sit, *and how much is for sale.*

SINGLE-FAMILY CONDO / TOWNHOME

MEDIAN SALE PRICE, APRIL 2026, CHANGE YEAR OVER YEAR



MONTHS SUPPLY OF INVENTORY, APRIL 2026



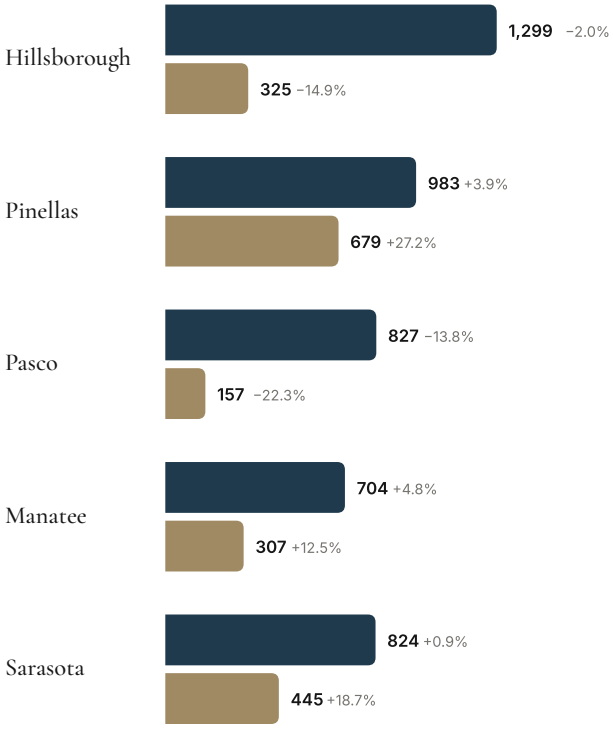
Median prices are the clearest single measure of value, but they also reflect the mix of homes that happened to sell in a given month. A month with more waterfront or new-construction closings will lift the median even if individual values are flat. That is why we pair price with supply.

Months supply measures how long current inventory would last at the average pace of sales over the past twelve months. Florida Realtors® economists treat 5.5 months as the benchmark for a balanced market. Single-family supply this month ranged from 3.7 to 4.7 months. Condominium supply ranged from 5.6 to 7.8 months.

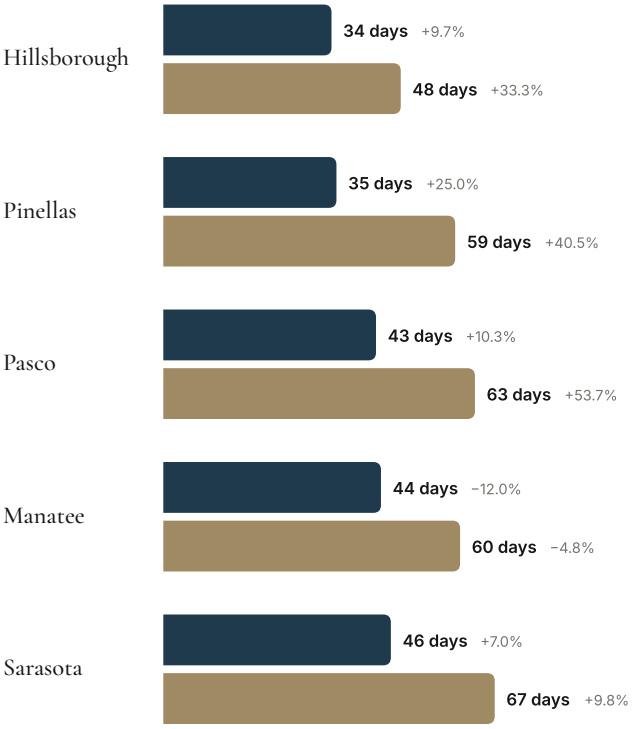
How many sold, *and how quickly.*

SINGLE-FAMILY CONDO / TOWNHOME

CLOSED SALES, APRIL 2026, CHANGE YEAR OVER YEAR



MEDIAN DAYS TO CONTRACT, CHANGE YEAR OVER YEAR



Closed sales confirm what buyers actually did. Because sales follow strong seasonal patterns in Florida, we compare each month with the same month a year earlier rather than with the prior month.

Days to contract is our preferred measure of urgency. In April, single-family homes went under contract fastest in Hillsborough at 34 days and slowest in Sarasota at 46 days. Rising days to contract typically precede softer pricing, and falling days typically precede firmer pricing.

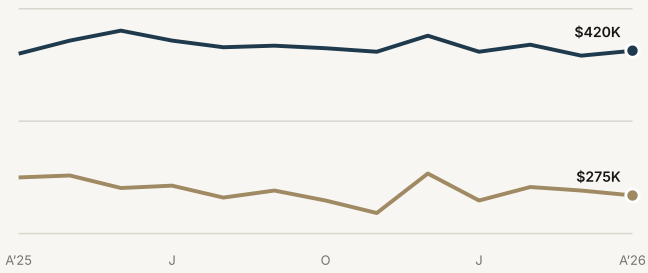
THIRTEEN-MONTH PRICE TRENDS

The line matters *more than the point.*

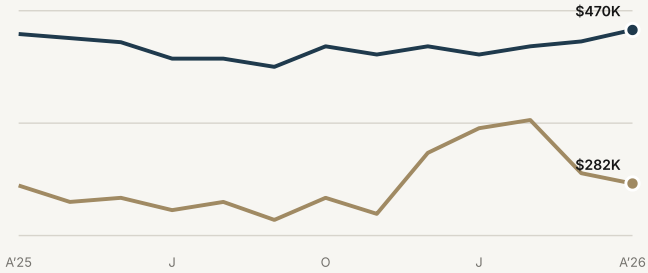
Median sale price for each county from April 2025 through April 2026. Reading a full year at once separates seasonal swings from genuine shifts in value.

SINGLE-FAMILY CONDO / TOWNHOME

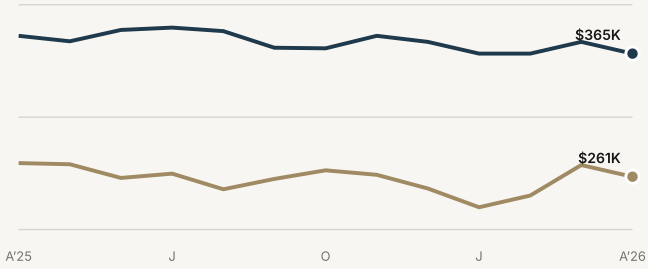
Hillsborough



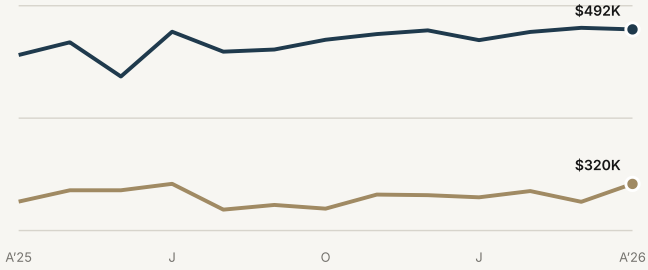
Pinellas



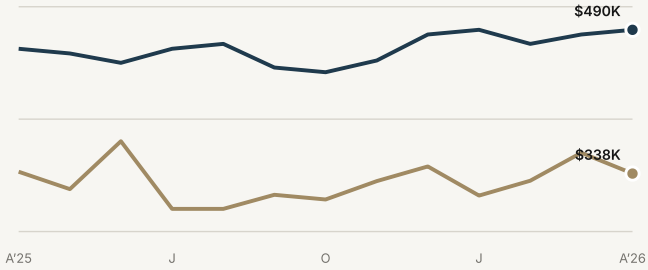
Pasco



Manatee



Sarasota



HOW TO READ THESE

Each line shows thirteen monthly medians. The labeled point is April 2026. Scales differ by county so that each county's own trend is visible. Compare shapes, not heights.



DOWNTOWN TAMPA AND THE HILLSBOROUGH RIVER

COUNTY REPORT · APRIL 2026

Hillsborough *County*

TAMPA, BRANDON, RIVERVIEW, PLANT CITY AND THE NORTHERN SUBURBS

SINGLE-FAMILY HOMES		
Closed sales	1,299	−2.0%
Median sale price	$420,000	+0.7%
Average sale price	$561,951	+3.9%
Dollar volume	$730.0 M	+1.8%
Median days to contract	34	+9.7%
Median days to sale	75	+4.2%
% of original list received	96.9%	−0.1%
New listings	1,881	−11.5%
New pending sales	1,580	+9.6%
Active listings	4,433	−10.6%
Months supply	3.7	−7.5%
Cash share of sales	18%	

CONDOS AND TOWNHOMES		
Closed sales	325	−14.9%
Median sale price	$275,000	−6.1%
Average sale price	$364,574	+0.9%
Dollar volume	$118.5 M	−14.1%
Median days to contract	48	+33.3%
Median days to sale	85	+11.8%
% of original list received	94.7%	−1.4%
New listings	551	−11.6%
New pending sales	418	+8.3%
Active listings	1,787	−14.4%
Months supply	5.6	−5.1%
Cash share of sales	40%	

What the numbers *are saying.*

Single-family. Single-family closings in Hillsborough County totaled 1,299 in April, down 2.0 percent from a year earlier. The median sale price settled at $420,000, up 0.7 percent from a year earlier, and sellers received a median 96.9% of original list price. Homes went under contract in a median 34 days. With 4,433 active listings, the county held 3.7 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 325 closings, down 14.9 percent from a year earlier, at a median of $275,000. Supply stood at 5.6 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

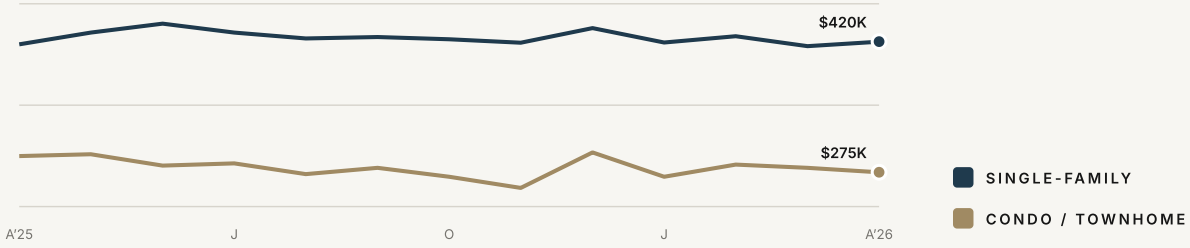
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	28	−12.5%	22	43	1.5
$200,000 to $299,999	143	+6.7%	43	270	1.9
$300,000 to $399,999	407	−6.0%	33	1,107	2.7
$400,000 to $499,999	283	+0.7%	30	1,012	3.6
$500,000 to $599,999	139	−4.8%	37	569	4.1
$600,000 to $699,999	91	−7.1%	44	318	3.5
$700,000 to $799,999	56	+40.0%	34	208	3.7
$800,000 to $899,999	29	−23.7%	50	173	6.0
$900,000 to $999,999	20	−25.9%	16	102	5.1
$1,000,000 or more	103	+6.2%	37	631	6.1

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	76	+31.0%	60	474	6.2
$200,000 to $299,999	114	−22.4%	40	544	4.8
$300,000 to $399,999	62	−28.7%	70	261	4.2
$400,000 to $499,999	24	+14.3%	58	127	5.3
$500,000 to $599,999	15	−11.8%	21	67	4.5
$600,000 to $699,999	9	−43.8%	77	61	6.8
$700,000 to $799,999	6	−50.0%	59	45	7.5
$800,000 to $899,999	6	−40.0%	40	29	4.8
$900,000 to $999,999	2	−60.0%	23	21	10.5
$1,000,000 or more	11	+22.2%	17	158	14.4

Hillsborough median sale price, thirteen months



Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.



DOWNTOWN ST. PETERSBURG AND THE ST. PETE PIER

COUNTY REPORT · APRIL 2026

Pinellas *County*

ST. PETERSBURG, CLEARWATER, DUNEDIN, LARGO AND THE GULF BEACHES

SINGLE-FAMILY HOMES

Closed sales	983	+3.9%
Median sale price	$469,900	+1.1%
Average sale price	$677,464	+13.6%
Dollar volume	$665.9 M	+18.1%
Median days to contract	35	+25.0%
Median days to sale	75	+19.0%
% of original list received	94.9%	0.0%
New listings	1,233	−20.1%
New pending sales	1,085	+9.2%
Active listings	3,198	−22.1%
Months supply	3.7	−26.0%
Cash share of sales	33%	

CONDOS AND TOWNHOMES

Closed sales	679	+27.2%
Median sale price	$282,500	+0.9%
Average sale price	$526,172	+27.6%
Dollar volume	$357.3 M	+62.2%
Median days to contract	59	+40.5%
Median days to sale	90	+16.9%
% of original list received	91.7%	−1.5%
New listings	941	−6.3%
New pending sales	655	+26.4%
Active listings	4,132	−3.5%
Months supply	7.8	−9.3%
Cash share of sales	58%	

What the numbers *are saying.*

Single-family. Single-family closings in Pinellas County totaled 983 in April, up 3.9 percent from a year earlier. The median sale price settled at $469,900, up 1.1 percent from a year earlier, and sellers received a median 94.9% of original list price. Homes went under contract in a median 35 days. With 3,198 active listings, the county held 3.7 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 679 closings, up 27.2 percent from a year earlier, at a median of $282,500. Supply stood at 7.8 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

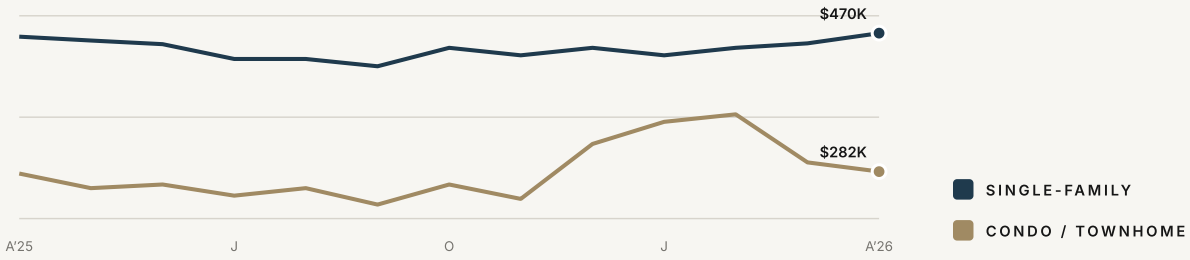
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	20	−39.4%	9	23	1.1
$200,000 to $299,999	103	−7.2%	36	217	2.1
$300,000 to $399,999	231	+9.0%	34	544	2.4
$400,000 to $499,999	182	+3.4%	33	527	2.9
$500,000 to $599,999	133	+15.7%	25	393	3.0
$600,000 to $699,999	63	−21.3%	32	274	4.3
$700,000 to $799,999	48	−9.4%	30	207	4.3
$800,000 to $899,999	36	−12.2%	26	140	3.9
$900,000 to $999,999	18	−28.0%	71	109	6.1
$1,000,000 or more	149	+49.0%	58	764	5.1

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	223	+41.1%	66	1,172	5.3
$200,000 to $299,999	136	+8.8%	58	838	6.2
$300,000 to $399,999	85	+11.8%	67	528	6.2
$400,000 to $499,999	47	0.0%	83	348	7.4
$500,000 to $599,999	35	+29.6%	58	239	6.8
$600,000 to $699,999	36	+33.3%	80	205	5.7
$700,000 to $799,999	21	+31.3%	54	139	6.6
$800,000 to $899,999	11	−35.3%	46	116	10.5
$900,000 to $999,999	6	−40.0%	68	91	15.2
$1,000,000 or more	79	+154.8%	6	456	5.8

Pinellas median sale price, thirteen months



Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.



GULF HARBORS, NEW PORT RICHEY

COUNTY REPORT · APRIL 2026

Pasco *County*

NEW PORT RICHEY, WESLEY CHAPEL, LAND O' LAKES AND ZEPHYRHILLS

SINGLE-FAMILY HOMES

Closed sales	827	−13.8%
Median sale price	$365,000	−3.9%
Average sale price	$419,275	+1.5%
Dollar volume	$346.7 M	−12.5%
Median days to contract	43	+10.3%
Median days to sale	82	+3.8%
% of original list received	96.5%	−0.4%
New listings	1,204	−14.1%
New pending sales	959	−8.0%
Active listings	3,050	−6.0%
Months supply	3.8	−2.6%
Cash share of sales	20%	

CONDOS AND TOWNHOMES

Closed sales	157	−22.3%
Median sale price	$260,900	−4.2%
Average sale price	$243,023	−8.7%
Dollar volume	$38.2 M	−29.1%
Median days to contract	63	+53.7%
Median days to sale	104	+23.8%
% of original list received	94.7%	−2.1%
New listings	295	−8.7%
New pending sales	181	−9.0%
Active listings	1,052	−0.8%
Months supply	6.3	+37.0%
Cash share of sales	43%	

What the numbers *are saying.*

Single-family. Single-family closings in Pasco County totaled 827 in April, down 13.8 percent from a year earlier. The median sale price settled at $365,000, down 3.9 percent from a year earlier, and sellers received a median 96.5% of original list price. Homes went under contract in a median 43 days. With 3,050 active listings, the county held 3.8 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 157 closings, down 22.3 percent from a year earlier, at a median of $260,900. Supply stood at 6.3 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

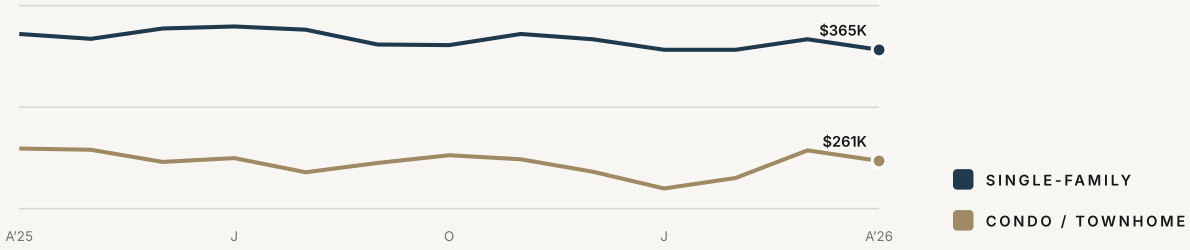
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	58	−21.6%	43	73	1.3
$200,000 to $299,999	191	−7.3%	42	599	3.1
$300,000 to $399,999	239	−9.5%	40	793	3.3
$400,000 to $499,999	136	−29.5%	47	570	4.2
$500,000 to $599,999	84	−11.6%	55	385	4.6
$600,000 to $699,999	36	−28.0%	82	209	5.8
$700,000 to $799,999	27	+28.6%	18	133	4.9
$800,000 to $899,999	24	0.0%	39	93	3.9
$900,000 to $999,999	12	+33.3%	25	52	4.3
$1,000,000 or more	20	−13.0%	66	143	7.2

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	52	+33.3%	62	374	7.2
$200,000 to $299,999	58	−32.6%	64	360	6.2
$300,000 to $399,999	40	−42.0%	57	250	6.2
$400,000 to $499,999	5	−37.5%	54	45	9.0
$500,000 to $599,999	1	N/A	144	8	8.0
$600,000 to $699,999	1	N/A	12	8	8.0
$700,000 to $799,999	0	N/A	·	5	·
$800,000 to $899,999	0	N/A	·	0	·
$900,000 to $999,999	0	N/A	·	0	·
$1,000,000 or more	0	N/A	·	2	·

Pasco median sale price, thirteen months



Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.

COUNTY REPORT

Manatee

BRADENTON, LAKEWOOD RANCH, PALMETTO AND ANNA MARIA ISLAND

COUNTY REPORT · APRIL 2026

Manatee *County*

BRADENTON, LAKEWOOD RANCH, PALMETTO AND ANNA MARIA ISLAND

SINGLE-FAMILY HOMES

Closed sales	704	+4.8%
Median sale price	$492,500	+6.1%
Average sale price	$760,094	+22.9%
Dollar volume	$535.1 M	+28.8%
Median days to contract	44	−12.0%
Median days to sale	88	−4.3%
% of original list received	94.6%	+0.6%
New listings	957	−2.2%
New pending sales	821	+4.6%
Active listings	2,929	−9.9%
Months supply	4.6	−11.5%
Cash share of sales	33%	

CONDOS AND TOWNHOMES

Closed sales	307	+12.5%
Median sale price	$320,000	+6.6%
Average sale price	$335,660	−2.3%
Dollar volume	$103.0 M	+9.9%
Median days to contract	60	−4.8%
Median days to sale	103	+5.1%
% of original list received	93.2%	+0.4%
New listings	374	−6.5%
New pending sales	267	+14.6%
Active listings	1,582	−12.9%
Months supply	6.9	−15.9%
Cash share of sales	59%	

What the numbers *are saying.*

Single-family. Single-family closings in Manatee County totaled 704 in April, up 4.8 percent from a year earlier. The median sale price settled at $492,500, up 6.1 percent from a year earlier, and sellers received a median 94.6% of original list price. Homes went under contract in a median 44 days. With 2,929 active listings, the county held 4.6 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 307 closings, up 12.5 percent from a year earlier, at a median of $320,000. Supply stood at 6.9 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

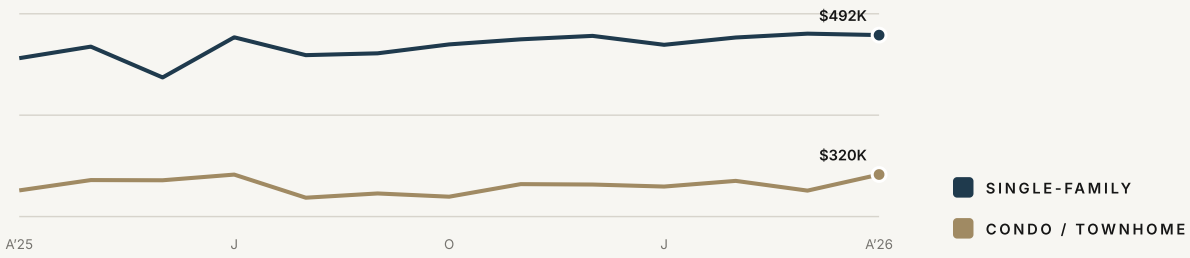
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	4	−60.0%	10	15	3.8
$200,000 to $299,999	32	−28.9%	49	77	2.4
$300,000 to $399,999	166	−4.0%	59	529	3.2
$400,000 to $499,999	153	+3.4%	44	605	4.0
$500,000 to $599,999	78	−6.0%	31	394	5.1
$600,000 to $699,999	60	−6.3%	36	276	4.6
$700,000 to $799,999	49	+25.6%	22	177	3.6
$800,000 to $899,999	31	+55.0%	30	137	4.4
$900,000 to $999,999	23	+4.5%	68	107	4.7
$1,000,000 or more	108	+58.8%	47	612	5.7

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	54	+14.9%	90	365	6.8
$200,000 to $299,999	82	−5.7%	67	377	4.6
$300,000 to $399,999	99	+16.5%	47	367	3.7
$400,000 to $499,999	34	+36.0%	38	150	4.4
$500,000 to $599,999	16	+100.0%	66	92	5.8
$600,000 to $699,999	11	+266.7%	72	63	5.7
$700,000 to $799,999	3	−50.0%	37	63	21.0
$800,000 to $899,999	3	0.0%	362	26	8.7
$900,000 to $999,999	2	+100.0%	157	22	11.0
$1,000,000 or more	3	−62.5%	34	57	19.0

Manatee median sale price, thirteen months



Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.



A RESIDENCE IN SARASOTA

COUNTY REPORT · APRIL 2026

Sarasota *County*

SARASOTA, VENICE, NORTH PORT AND LONGBOAT KEY

SINGLE-FAMILY HOMES		
Closed sales	824	+0.9%
Median sale price	$490,000	+4.3%
Average sale price	$814,685	+24.6%
Dollar volume	$671.3 M	+25.7%
Median days to contract	46	+7.0%
Median days to sale	86	+4.9%
% of original list received	94.3%	+1.3%
New listings	989	−12.0%
New pending sales	874	+17.0%
Active listings	3,258	−26.8%
Months supply	4.7	−32.9%
Cash share of sales	44%	

CONDOS AND TOWNHOMES		
Closed sales	445	+18.7%
Median sale price	$337,500	−0.6%
Average sale price	$530,268	−4.6%
Dollar volume	$236.0 M	+13.2%
Median days to contract	67	+9.8%
Median days to sale	103	−1.0%
% of original list received	91.1%	+1.4%
New listings	500	+0.2%
New pending sales	408	+35.1%
Active listings	2,300	−13.3%
Months supply	7.7	−19.8%
Cash share of sales	70%	

What the numbers *are saying.*

Single-family. Single-family closings in Sarasota County totaled 824 in April, up 0.9 percent from a year earlier. The median sale price settled at $490,000, up 4.3 percent from a year earlier, and sellers received a median 94.3% of original list price. Homes went under contract in a median 46 days. With 3,258 active listings, the county held 4.7 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 445 closings, up 18.7 percent from a year earlier, at a median of $337,500. Supply stood at 7.7 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

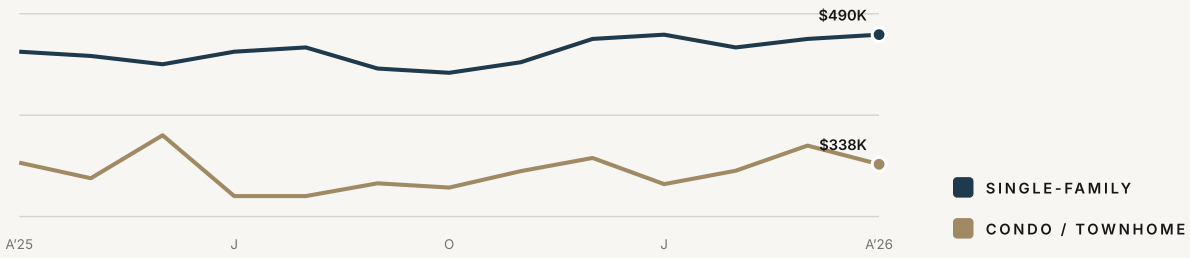
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	21	+75.0%	13	36	1.7
$200,000 to $299,999	82	−17.2%	33	249	3.0
$300,000 to $399,999	187	−7.0%	44	629	3.4
$400,000 to $499,999	131	+6.5%	61	452	3.5
$500,000 to $599,999	100	+11.1%	49	357	3.6
$600,000 to $699,999	78	+4.0%	45	270	3.5
$700,000 to $799,999	48	−15.8%	33	184	3.8
$800,000 to $899,999	26	−23.5%	38	126	4.8
$900,000 to $999,999	17	−45.2%	17	96	5.6
$1,000,000 or more	134	+41.1%	54	859	6.4

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	68	+88.9%	81	271	4.0
$200,000 to $299,999	118	+24.2%	83	542	4.6
$300,000 to $399,999	98	−3.0%	45	413	4.2
$400,000 to $499,999	54	+38.5%	50	222	4.1
$500,000 to $599,999	25	+31.6%	109	140	5.6
$600,000 to $699,999	10	0.0%	53	127	12.7
$700,000 to $799,999	10	+42.9%	70	68	6.8
$800,000 to $899,999	10	−28.6%	12	59	5.9
$900,000 to $999,999	6	−25.0%	117	67	11.2
$1,000,000 or more	46	0.0%	92	391	8.5

Sarasota median sale price, thirteen months

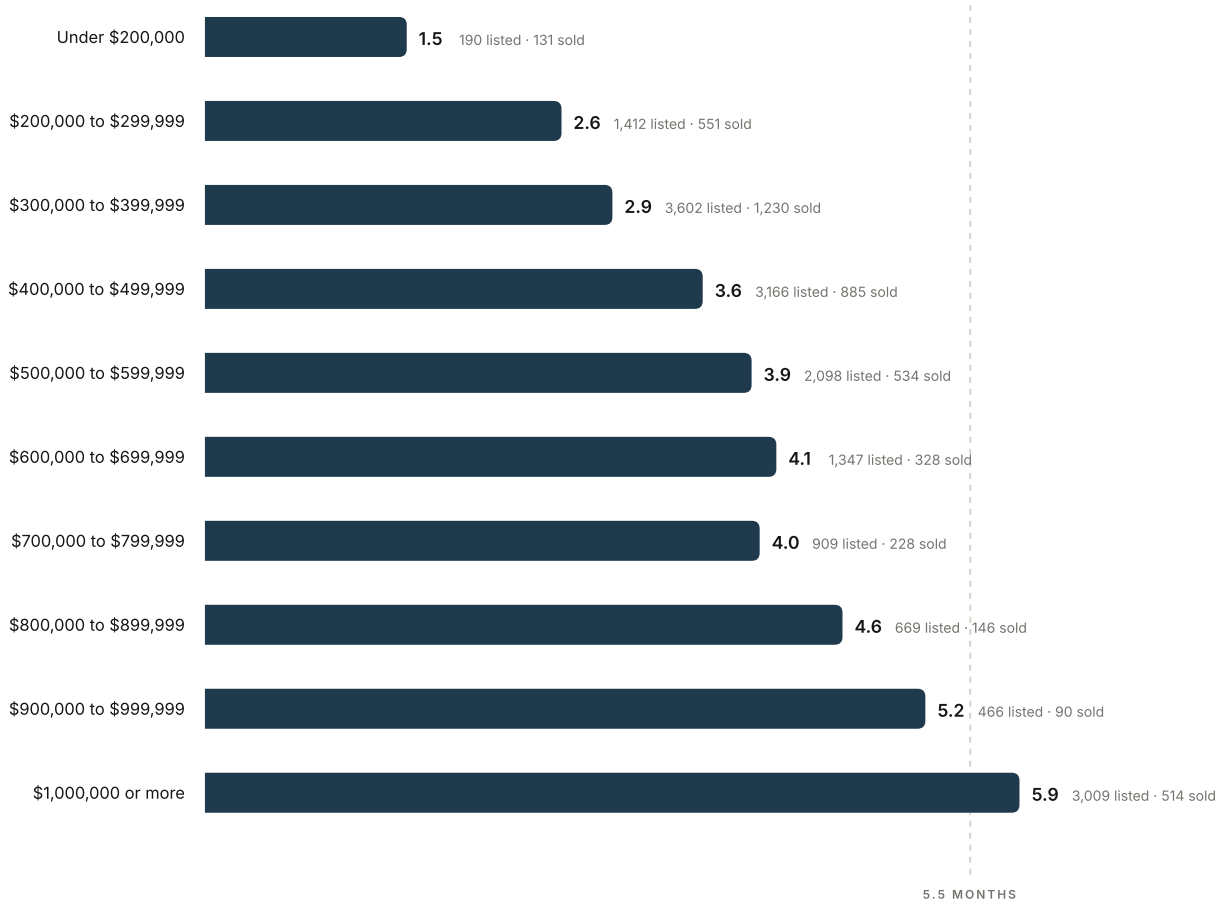


Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.

Not one market, *but many price points.*

Combining all five counties, we compared active single-family listings in each price range with the number of homes that sold in that range during April. The result shows where inventory is scarce and where buyers have more choice.

LISTINGS-TO-SALES RATIO BY PRICE RANGE, APRIL 2026



UNDER $500,000

Listings in these ranges equaled 3.0 months of April's sales. Entry and mid-priced homes continue to carry the most transactions in the region.

$700,000 AND ABOVE

Listings equaled 5.2 months of April's sales. Higher price points typically carry deeper inventory, which places more weight on presentation and pricing precision.

Sales are grouped by sale price and listings by current list price, so the ratio is an approximation. Single-month ratios can swing with seasonal sales volume.



THE LUXURY MARKET · $1,000,000 AND ABOVE

The million-dollar *spotlight.*

Across the five counties, 514 single-family homes sold for $1 million or more in April, against 3,009 active listings at that level at month end.

BY PRICE RANGE, FIVE COUNTIES

RANGE	SOLD	NEW LISTINGS	ACTIVE
$1M to $1.25M	155	198	584
$1.25M to $1.5M	97	136	531
$1.5M to $2M	99	142	637
$2M to $3M	84	93	527
$3M to $5M	55	65	429
$5M to $10M	19	25	227
$10M and above	5	13	74

$1M AND ABOVE, BY COUNTY

COUNTY	SOLD	YOY	ACTIVE	YOY
Hillsborough	103	+6.2%	631	−8.6%
Pinellas	149	+49.0%	764	−4.3%
Pasco	20	−13.0%	143	+20.2%
Manatee	108	+58.8%	612	−10.3%
Sarasota	134	+41.1%	859	−6.0%

Beneath the headline *numbers.*

	SINGLE-FAMILY			CONDOS AND TOWNHOMES		
COUNTY	CASH SHARE	DISTRESSED SALES	PENDING TO NEW	CASH SHARE	DISTRESSED SALES	PENDING TO NEW
Hillsborough	18%	20	0.84	40%	0	0.76
Pinellas	33%	9	0.88	58%	5	0.70
Pasco	20%	10	0.80	43%	1	0.61
Manatee	33%	5	0.86	59%	1	0.71
Sarasota	44%	10	0.88	70%	1	0.82

CASH SHARE
The share of closings paid entirely in cash. Higher readings often point to investors, second-home buyers and downsizers with equity. Regionally, 28 percent of single-family and 57 percent of condominium sales closed in cash.

DISTRESSED SALES
Foreclosure, bank-owned and short sales combined. Counts that remain small relative to total sales indicate a market driven by traditional sellers rather than forced sales.

PENDING TO NEW
New pending sales divided by new listings. Above 1.0, buyers are absorbing listings faster than they arrive. Below 1.0, inventory is building. It is one of the earliest signals of a turn in either direction.

METHODOLOGY AND DEFINITIONS

How this report *is built.*

All figures come from the Florida Realtors® Monthly Market Detail reports for Hillsborough, Pinellas, Pasco, Manatee and Sarasota counties, produced with data provided by Florida's multiple listing services. Statistics for each month are compiled from MLS feeds on the tenth day of the following month. The April 2026 data was released on Friday, May 15, 2026.

Regional totals are sums of county figures. Regional average prices are total dollar volume divided by total closed sales. Ratios such as cash share, listings to sales and pending to new are calculated by Middleton Tampa Bay from the published figures.

Historical figures can be revised by Florida Realtors® as MLS data is updated. Every figure in this report reflects the data as published for April 2026.

Closed sales. Transactions that closed during the month.

Median sale price. The midpoint price of all closed sales. Half sold for more and half for less.

Average sale price. Dollar volume divided by closed sales. Sensitive to high-priced sales.

Median days to contract. Days from listing to accepted contract for homes that closed.

Percent of original list price. Sale price as a share of the original list price, at the median.

New pending sales. Listings that went under contract during the month.

Active listings. Listings active on the last day of the month.

Months supply. Active inventory divided by the twelve-month average of monthly closed sales. Florida Realtors® economists treat 5.5 months as balanced.

Cash sales. Closings paid entirely in cash.

This report is provided for informational purposes and is not an appraisal, financial or investment advice. Market conditions vary by neighborhood and property. For a pricing opinion on a specific home, contact Middleton Tampa Bay.



MARKET INTELLIGENCE, APPLIED

What does April mean *for your home?*

County numbers set the stage. Your street, your property and your timing decide the outcome. I will prepare a private valuation and strategy built on the latest sales in your neighborhood, at no cost and with no obligation.

MARK ALLEN MIDDLETON

REALTOR® · BROKER ASSOCIATE

727-871-7653

MARK@MIDDLETONTAMPABAY.COM

MIDDLETONTAMPABAY.COM

TAMPA BAY MARKET INTELLIGENCE

April 2026

MIDDLETON
TAMPA BAY

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727-871-7653 · MARK@MIDDLETONTAMPABAY.COM · MIDDLETONTAMPABAY.COM

COMPASS

Source: Florida Realtors® Monthly Market Detail, April 2026, with data provided by Florida's multiple listing services. Analysis and commentary by Middleton Tampa Bay. Compass is a licensed real estate broker and abides by Equal Housing Opportunity laws. All material is intended for informational purposes only and is compiled from sources deemed reliable but is subject to errors, omissions and changes without notice. 3615 Bromley Grand Avenue, Suite 230, Tampa, Florida 33607.