

TAMPA BAY MARKET INTELLIGENCE · MONTHLY REPORT

January 2026

MIDDLETON
TAMPA BAY

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

DATA RELEASED TUESDAY, FEBRUARY 17, 2026

The month *in numbers.*

2,865
SINGLE-FAMILY SALES
down 10.7% year over year

$1.70B
SINGLE-FAMILY VOLUME
down 7.2% year over year

16,993
ACTIVE SF LISTINGS
down 2.9% year over year

1,214
CONDO AND TOWNHOME SALES
down 1.7% year over year

KEY TAKEAWAYS

- Single-family closings across the five counties totaled 2,865, down 10.7 percent from a year earlier, with $1.70 billion in dollar volume.
- Pinellas posted the strongest single-family median price change at +1.1%, while Sarasota posted the weakest at minus 7.5%.
- Single-family supply ranged from 3.6 months in Hillsborough to 5.0 months in Sarasota.
- Condominium and townhome closings totaled 1,214, down 1.7 percent from a year earlier, and condo supply ranged from 5.2 to 8.9 months.
- Active single-family inventory stood at 16,993 listings, down 2.9 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	2,865 −10.7%	$1.70 B −7.2%	$594,520 +3.9%	6,322 −9.9%	4,510 +3.7%	16,993 −2.9%	32%
Condo and Townhome	1,214 −1.7%	$625.9 M +14.8%	$515,568 +16.8%	3,372 −4.7%	1,820 +12.3%	10,872 +2.7%	56%

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 January *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 January, regional single-family sales were down 10.7 percent from a year earlier and the regional average price was up 3.9 percent from a year earlier. Active inventory was down 2.9 percent on the year.

WHAT STOOD OUT

Pinellas led the region in single-family price growth at +1.1% year over year. Hillsborough had the tightest supply at 3.6 months. Homes moved fastest in Sarasota, at a median 48 days to contract, and slowest in Manatee, at 58 days.

Negotiating room varied as well. Sellers received a median 95.5% of original list price in Hillsborough and 92.9% in Pinellas.

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, 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 January 2026 value with its change from January 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	791 −4.1%	$419,000 +1.0%	$557,389 +6.8%	50 +31.6%	95.5% −0.7%	4,370 +1.3%	3.6 +5.9%	20%
Pinellas	590 −16.5%	$440,000 +1.1%	$639,779 +9.3%	49 +28.9%	92.9% −1.0%	3,260 −1.8%	3.7 −7.5%	39%
Pasco	517 −21.5%	$365,000 −3.2%	$422,957 +3.6%	49 +14.0%	95.2% −0.1%	3,076 +3.4%	3.7 +5.7%	26%
Manatee	444 −10.8%	$480,495 +0.1%	$647,324 −2.3%	58 +18.4%	94.2% −0.5%	2,843 −2.2%	4.6 0.0%	32%
Sarasota	523 +0.6%	$490,000 −7.5%	$724,234 −4.0%	48 +6.7%	93.7% −0.4%	3,444 −13.7%	5.0 −21.9%	46%
Region	2,865 −10.7%	By county	$594,520 +3.9%	By county	By county	16,993 −2.9%	By county	32%

6,322
NEW LISTINGS
down 9.9% year over year, five counties

4,510
NEW PENDING SALES
up 3.7% year over year, five counties

2,865
CLOSED SALES YEAR TO DATE
January through January, five counties

YEAR TO DATE, JANUARY THROUGH JANUARY

791
HILLSBOROUGH
down 4.1% in closed sales

590
PINELLAS
down 16.5% in closed sales

517
PASCO
down 21.5% in closed sales

444
MANATEE
down 10.8% in closed sales

523
SARASOTA
up 0.6% 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 January 2026 value with its change from January 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	210 −17.6%	$270,000 −5.6%	$458,467 +24.9%	74 +45.1%	93.2% −2.5%	1,759 −2.7%	5.4 +10.2%	45%
Pinellas	476 +26.9%	$350,000 +32.6%	$661,936 +64.7%	38 −29.6%	95.4% +1.9%	4,096 +12.7%	8.3 +16.9%	53%
Pasco	95 −50.3%	$235,000 −17.5%	$226,427 −18.7%	79 +71.7%	92.0% −3.8%	937 −2.9%	5.2 +33.3%	51%
Manatee	169 −1.7%	$305,000 −9.2%	$366,887 −10.1%	65 +8.3%	91.2% −2.0%	1,631 −4.8%	7.2 −10.0%	62%
Sarasota	264 +9.1%	$314,175 −9.5%	$496,265 −32.2%	66 +24.5%	92.2% −0.3%	2,449 −0.6%	8.9 +4.7%	69%
Region	1,214 −1.7%	By county	$515,568 +16.8%	By county	By county	10,872 +2.7%	By county	56%

3,372
NEW LISTINGS
down 4.7% year over year, five counties

1,820
NEW PENDING SALES
up 12.3% year over year, five counties

1,214
CLOSED SALES YEAR TO DATE
January through January, five counties

YEAR TO DATE, JANUARY THROUGH JANUARY

210
HILLSBOROUGH
down 17.6% in closed sales

476
PINELLAS
up 26.9% in closed sales

95
PASCO
down 50.3% in closed sales

169
MANATEE
down 1.7% in closed sales

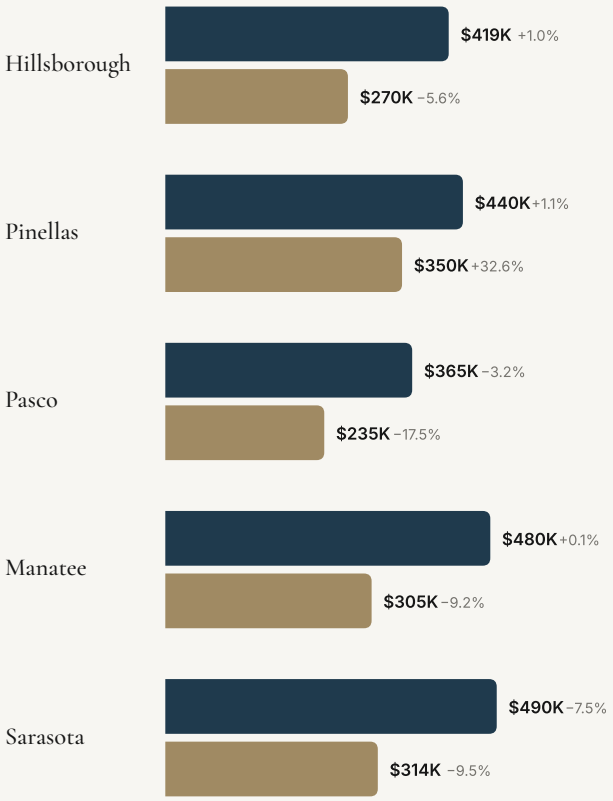
264
SARASOTA
up 9.1% in closed sales

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.

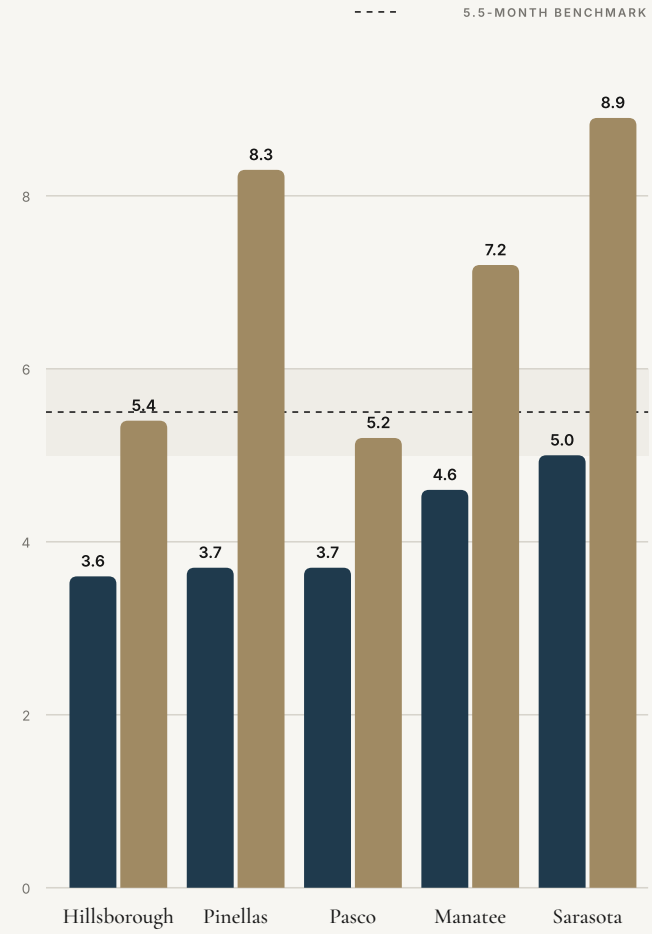
Where values sit, *and how much is for sale.*

SINGLE-FAMILY CONDO / TOWNHOME

MEDIAN SALE PRICE, JANUARY 2026, CHANGE YEAR OVER YEAR



MONTHS SUPPLY OF INVENTORY, JANUARY 2026



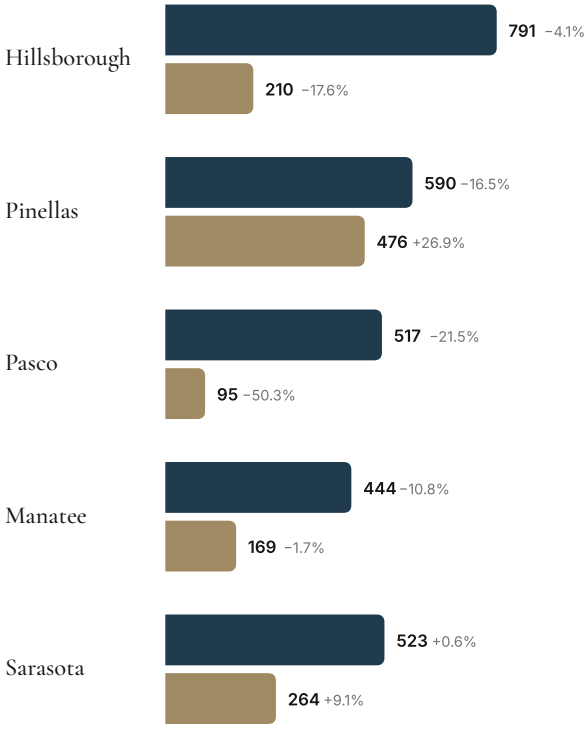
Median prices are the clearest single measure of value, but they also reflect the mix of homes that happened to sell in a given month. A month with more waterfront or new-construction closings will lift the median even if individual values are flat. That is why we pair price with supply.

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 3.6 to 5.0 months. Condominium supply ranged from 5.2 to 8.9 months.

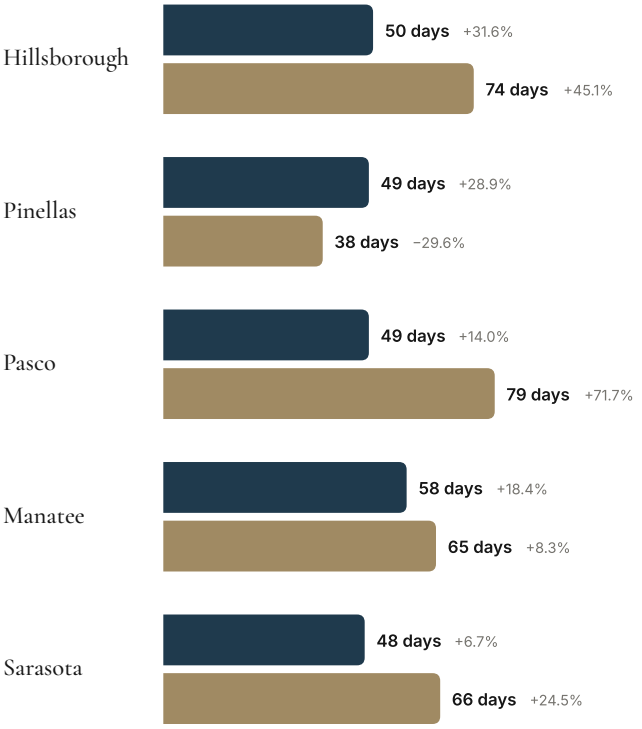
How many sold, *and how quickly.*

SINGLE-FAMILY CONDO / TOWNHOME

CLOSED SALES, JANUARY 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 January, single-family homes went under contract fastest in Sarasota at 48 days and slowest in Manatee at 58 days. Rising days to contract typically precede softer pricing, and falling days typically precede firmer pricing.

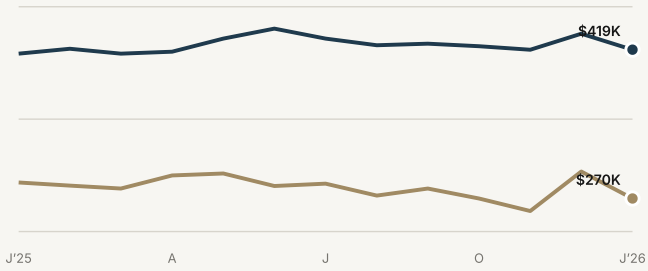
THIRTEEN-MONTH PRICE TRENDS

The line matters *more than the point.*

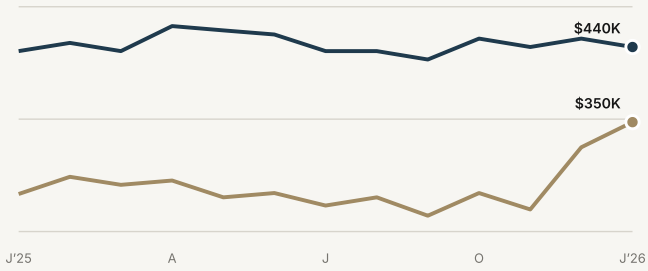
Median sale price for each county from January 2025 through January 2026. Reading a full year at once separates seasonal swings from genuine shifts in value.

SINGLE-FAMILY CONDO / TOWNHOME

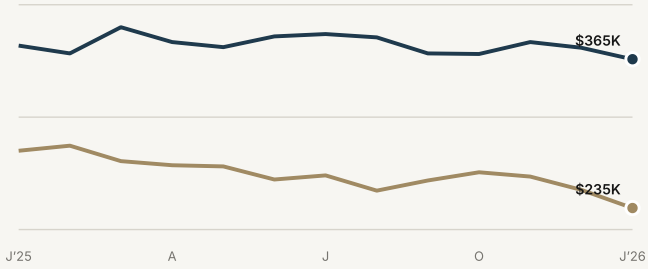
Hillsborough



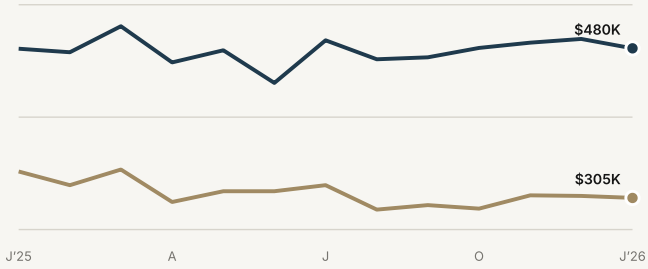
Pinellas



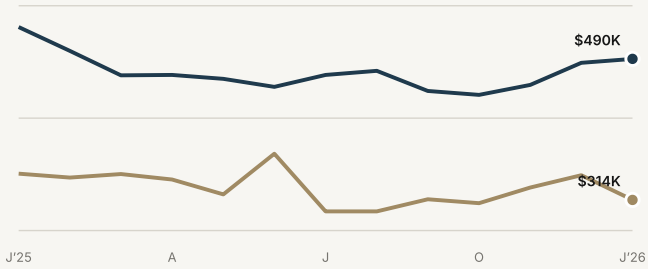
Pasco



Manatee



Sarasota



HOW TO READ THESE

Each line shows thirteen monthly medians. The labeled point is January 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 · JANUARY 2026

Hillsborough *County*

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

SINGLE-FAMILY HOMES

Closed sales	791	−4.1%
Median sale price	$419,000	+1.0%
Average sale price	$557,389	+6.8%
Dollar volume	$440.9 M	+2.4%
Median days to contract	50	+31.6%
Median days to sale	92	+21.1%
% of original list received	95.5%	−0.7%
New listings	1,699	−6.2%
New pending sales	1,283	+4.2%
Active listings	4,370	+1.3%
Months supply	3.6	+5.9%
Cash share of sales	20%	

CONDOS AND TOWNHOMES

Closed sales	210	−17.6%
Median sale price	$270,000	−5.6%
Average sale price	$458,467	+24.9%
Dollar volume	$96.3 M	+2.9%
Median days to contract	74	+45.1%
Median days to sale	110	+23.6%
% of original list received	93.2%	−2.5%
New listings	580	−7.8%
New pending sales	305	−9.8%
Active listings	1,759	−2.7%
Months supply	5.4	+10.2%
Cash share of sales	45%	

What the numbers *are saying.*

Single-family. Single-family closings in Hillsborough County totaled 791 in January, down 4.1 percent from a year earlier. The median sale price settled at $419,000, up 1.0 percent from a year earlier, and sellers received a median 95.5% of original list price. Homes went under contract in a median 50 days. With 4,370 active listings, the county held 3.6 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 210 closings, down 17.6 percent from a year earlier, at a median of $270,000. Supply stood at 5.4 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

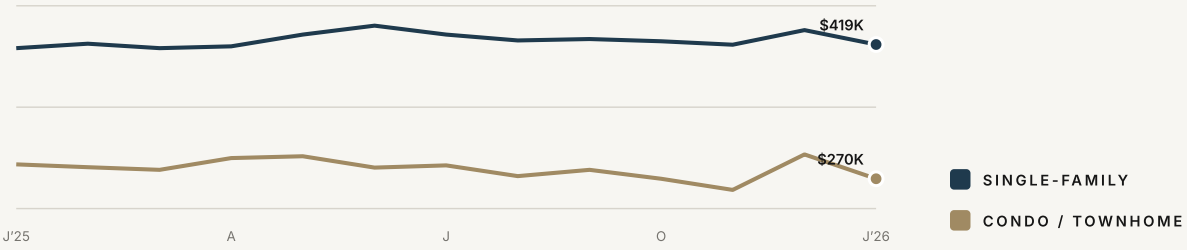
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	28	+7.7%	56	62	2.2
$200,000 to $299,999	100	−12.3%	46	334	3.3
$300,000 to $399,999	231	−3.8%	48	1,146	5.0
$400,000 to $499,999	168	−1.8%	47	948	5.6
$500,000 to $599,999	82	−4.7%	73	542	6.6
$600,000 to $699,999	57	+9.6%	52	337	5.9
$700,000 to $799,999	34	−8.1%	43	216	6.4
$800,000 to $899,999	12	−57.1%	9	138	11.5
$900,000 to $999,999	11	−38.9%	43	98	8.9
$1,000,000 or more	68	+28.3%	42	549	8.1

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	55	+37.5%	82	443	8.1
$200,000 to $299,999	73	−29.1%	75	567	7.8
$300,000 to $399,999	29	−55.4%	61	278	9.6
$400,000 to $499,999	15	+66.7%	49	108	7.2
$500,000 to $599,999	3	−57.1%	5	77	25.7
$600,000 to $699,999	4	−55.6%	21	63	15.8
$700,000 to $799,999	4	+100.0%	·	44	11.0
$800,000 to $899,999	6	+20.0%	186	35	5.8
$900,000 to $999,999	3	−40.0%	61	18	6.0
$1,000,000 or more	18	+80.0%	108	126	7.0

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 · JANUARY 2026

Pinellas *County*

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

SINGLE-FAMILY HOMES

Closed sales	590	−16.5%
Median sale price	$440,000	+1.1%
Average sale price	$639,779	+9.3%
Dollar volume	$377.5 M	−8.8%
Median days to contract	49	+28.9%
Median days to sale	84	+15.1%
% of original list received	92.9%	−1.0%
New listings	1,269	−11.9%
New pending sales	904	−5.8%
Active listings	3,260	−1.8%
Months supply	3.7	−7.5%
Cash share of sales	39%	

CONDOS AND TOWNHOMES

Closed sales	476	+26.9%
Median sale price	$350,000	+32.6%
Average sale price	$661,936	+64.7%
Dollar volume	$315.1 M	+109.1%
Median days to contract	38	−29.6%
Median days to sale	76	−10.6%
% of original list received	95.4%	+1.9%
New listings	1,254	+7.8%
New pending sales	689	+31.5%
Active listings	4,096	+12.7%
Months supply	8.3	+16.9%
Cash share of sales	53%	

What the numbers *are saying.*

Single-family. Single-family closings in Pinellas County totaled 590 in January, down 16.5 percent from a year earlier. The median sale price settled at $440,000, up 1.1 percent from a year earlier, and sellers received a median 92.9% of original list price. Homes went under contract in a median 49 days. With 3,260 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 476 closings, up 26.9 percent from a year earlier, at a median of $350,000. Supply stood at 8.3 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

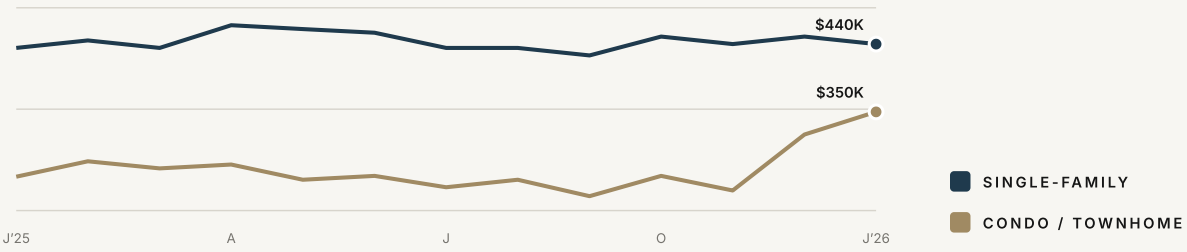
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	20	−20.0%	36	27	1.4
$200,000 to $299,999	72	−18.2%	51	257	3.6
$300,000 to $399,999	158	−7.6%	38	583	3.7
$400,000 to $499,999	98	−24.0%	49	556	5.7
$500,000 to $599,999	50	−41.9%	42	363	7.3
$600,000 to $699,999	46	−8.0%	57	244	5.3
$700,000 to $799,999	31	+29.2%	41	205	6.6
$800,000 to $899,999	24	−31.4%	95	143	6.0
$900,000 to $999,999	21	−22.2%	126	110	5.2
$1,000,000 or more	70	−2.8%	71	772	11.0

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	131	+6.5%	69	1,135	8.7
$200,000 to $299,999	73	−21.5%	64	851	11.7
$300,000 to $399,999	52	+18.2%	60	561	10.8
$400,000 to $499,999	30	+7.1%	60	328	10.9
$500,000 to $599,999	18	+50.0%	48	264	14.7
$600,000 to $699,999	17	+6.3%	104	186	10.9
$700,000 to $799,999	13	−35.0%	22	145	11.2
$800,000 to $899,999	9	−25.0%	0	112	12.4
$900,000 to $999,999	9	+50.0%	0	92	10.2
$1,000,000 or more	124	+490.5%	0	422	3.4

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 · JANUARY 2026

Pasco *County*

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

SINGLE-FAMILY HOMES		
Closed sales	517	−21.5%
Median sale price	$365,000	−3.2%
Average sale price	$422,957	+3.6%
Dollar volume	$218.7 M	−18.8%
Median days to contract	49	+14.0%
Median days to sale	87	+3.6%
% of original list received	95.2%	−0.1%
New listings	1,170	−1.9%
New pending sales	811	−6.4%
Active listings	3,076	+3.4%
Months supply	3.7	+5.7%
Cash share of sales	26%	

CONDOS AND TOWNHOMES		
Closed sales	95	−50.3%
Median sale price	$235,000	−17.5%
Average sale price	$226,427	−18.7%
Dollar volume	$21.5 M	−59.6%
Median days to contract	79	+71.7%
Median days to sale	116	+26.1%
% of original list received	92.0%	−3.8%
New listings	297	−14.2%
New pending sales	174	−24.0%
Active listings	937	−2.9%
Months supply	5.2	+33.3%
Cash share of sales	51%	

What the numbers *are saying.*

Single-family. Single-family closings in Pasco County totaled 517 in January, down 21.5 percent from a year earlier. The median sale price settled at $365,000, down 3.2 percent from a year earlier, and sellers received a median 95.2% of original list price. Homes went under contract in a median 49 days. With 3,076 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 95 closings, down 50.3 percent from a year earlier, at a median of $235,000. Supply stood at 5.2 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

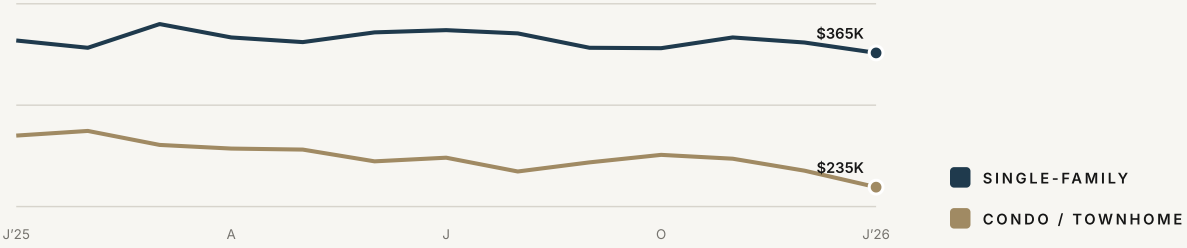
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	37	−41.3%	30	109	2.9
$200,000 to $299,999	116	−12.8%	42	643	5.5
$300,000 to $399,999	151	−19.7%	53	829	5.5
$400,000 to $499,999	85	−36.1%	54	573	6.7
$500,000 to $599,999	49	−19.7%	74	339	6.9
$600,000 to $699,999	27	−12.9%	47	197	7.3
$700,000 to $799,999	12	−29.4%	12	99	8.2
$800,000 to $899,999	16	+77.8%	47	98	6.1
$900,000 to $999,999	10	+42.9%	·	57	5.7
$1,000,000 or more	14	−17.6%	100	132	9.4

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	39	+62.5%	105	340	8.7
$200,000 to $299,999	32	−64.4%	91	330	10.3
$300,000 to $399,999	19	−71.6%	39	196	10.3
$400,000 to $499,999	5	−50.0%	45	43	8.6
$500,000 to $599,999	0	N/A	·	14	·
$600,000 to $699,999	0	N/A	·	9	·
$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	·	0	·

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 · JANUARY 2026

Manatee *County*

BRADENTON, LAKEWOOD RANCH, PALMETTO AND ANNA MARIA ISLAND

SINGLE-FAMILY HOMES

Closed sales	444	−10.8%
Median sale price	$480,495	+0.1%
Average sale price	$647,324	−2.3%
Dollar volume	$287.4 M	−12.9%
Median days to contract	58	+18.4%
Median days to sale	105	+7.1%
% of original list received	94.2%	−0.5%
New listings	1,018	−9.2%
New pending sales	709	+17.4%
Active listings	2,843	−2.2%
Months supply	4.6	0.0%
Cash share of sales	32%	

CONDOS AND TOWNHOMES

Closed sales	169	−1.7%
Median sale price	$305,000	−9.2%
Average sale price	$366,887	−10.1%
Dollar volume	$62.0 M	−11.7%
Median days to contract	65	+8.3%
Median days to sale	110	+4.8%
% of original list received	91.2%	−2.0%
New listings	488	−11.3%
New pending sales	261	+3.2%
Active listings	1,631	−4.8%
Months supply	7.2	−10.0%
Cash share of sales	62%	

What the numbers *are saying.*

Single-family. Single-family closings in Manatee County totaled 444 in January, down 10.8 percent from a year earlier. The median sale price settled at $480,495, up 0.1 percent from a year earlier, and sellers received a median 94.2% of original list price. Homes went under contract in a median 58 days. With 2,843 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 169 closings, down 1.7 percent from a year earlier, at a median of $305,000. Supply stood at 7.2 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

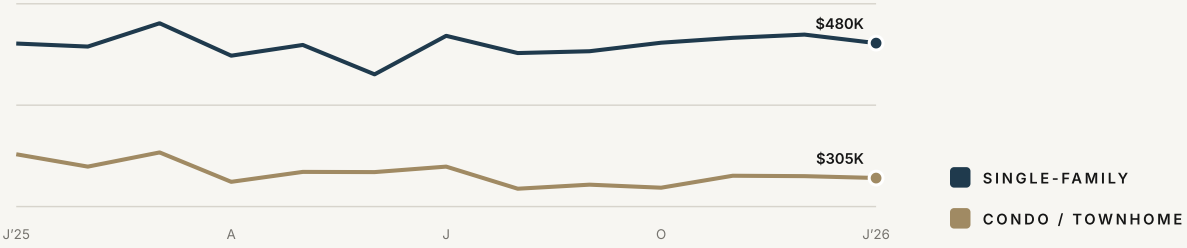
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	6	−40.0%	36	12	2.0
$200,000 to $299,999	22	+10.0%	44	85	3.9
$300,000 to $399,999	116	−19.4%	53	508	4.4
$400,000 to $499,999	97	+11.5%	66	578	6.0
$500,000 to $599,999	45	−32.8%	53	361	8.0
$600,000 to $699,999	35	−25.5%	77	245	7.0
$700,000 to $799,999	34	+9.7%	65	209	6.1
$800,000 to $899,999	21	+40.0%	59	127	6.0
$900,000 to $999,999	14	+7.7%	64	92	6.6
$1,000,000 or more	54	−15.6%	53	626	11.6

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	39	+105.3%	57	344	8.8
$200,000 to $299,999	42	−8.7%	114	403	9.6
$300,000 to $399,999	48	−21.3%	78	371	7.7
$400,000 to $499,999	15	−34.8%	41	187	12.5
$500,000 to $599,999	4	−33.3%	70	83	20.8
$600,000 to $699,999	6	+200.0%	41	68	11.3
$700,000 to $799,999	2	+100.0%	74	54	27.0
$800,000 to $899,999	3	+50.0%	60	30	10.0
$900,000 to $999,999	5	+150.0%	42	22	4.4
$1,000,000 or more	5	−50.0%	14	69	13.8

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 · JANUARY 2026

Sarasota *County*

SARASOTA, VENICE, NORTH PORT AND LONGBOAT KEY

SINGLE-FAMILY HOMES		
Closed sales	523	+0.6%
Median sale price	$490,000	−7.5%
Average sale price	$724,234	−4.0%
Dollar volume	$378.8 M	−3.5%
Median days to contract	48	+6.7%
Median days to sale	96	+12.9%
% of original list received	93.7%	−0.4%
New listings	1,166	−19.7%
New pending sales	803	+16.4%
Active listings	3,444	−13.7%
Months supply	5.0	−21.9%
Cash share of sales	46%	

CONDOS AND TOWNHOMES		
Closed sales	264	+9.1%
Median sale price	$314,175	−9.5%
Average sale price	$496,265	−32.2%
Dollar volume	$131.0 M	−26.1%
Median days to contract	66	+24.5%
Median days to sale	110	+27.9%
% of original list received	92.2%	−0.3%
New listings	753	−11.3%
New pending sales	391	+41.2%
Active listings	2,449	−0.6%
Months supply	8.9	+4.7%
Cash share of sales	69%	

What the numbers *are saying.*

Single-family. Single-family closings in Sarasota County totaled 523 in January, up 0.6 percent from a year earlier. The median sale price settled at $490,000, down 7.5 percent from a year earlier, and sellers received a median 93.7% of original list price. Homes went under contract in a median 48 days. With 3,444 active listings, the county held 5.0 months of supply, a reading we describe as near balance against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 264 closings, up 9.1 percent from a year earlier, at a median of $314,175. Supply stood at 8.9 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

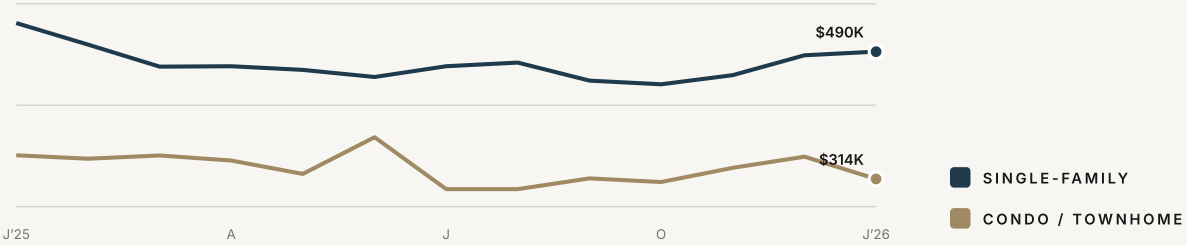
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	18	+63.6%	28	34	1.9
$200,000 to $299,999	57	+46.2%	40	279	4.9
$300,000 to $399,999	123	+11.8%	56	711	5.8
$400,000 to $499,999	66	−15.4%	41	477	7.2
$500,000 to $599,999	81	+24.6%	62	408	5.0
$600,000 to $699,999	41	−29.3%	66	295	7.2
$700,000 to $799,999	31	−3.1%	42	185	6.0
$800,000 to $899,999	18	−18.2%	33	132	7.3
$900,000 to $999,999	10	−56.5%	58	99	9.9
$1,000,000 or more	78	−4.9%	44	824	10.6

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	53	+152.4%	87	270	5.1
$200,000 to $299,999	65	+3.2%	83	555	8.5
$300,000 to $399,999	58	−10.8%	60	441	7.6
$400,000 to $499,999	20	−45.9%	46	249	12.4
$500,000 to $599,999	11	+37.5%	87	172	15.6
$600,000 to $699,999	14	+133.3%	107	117	8.4
$700,000 to $799,999	9	+350.0%	81	75	8.3
$800,000 to $899,999	6	+200.0%	31	68	11.3
$900,000 to $999,999	2	−50.0%	156	50	25.0
$1,000,000 or more	26	−23.5%	56	452	17.4

Sarasota median sale price, thirteen months

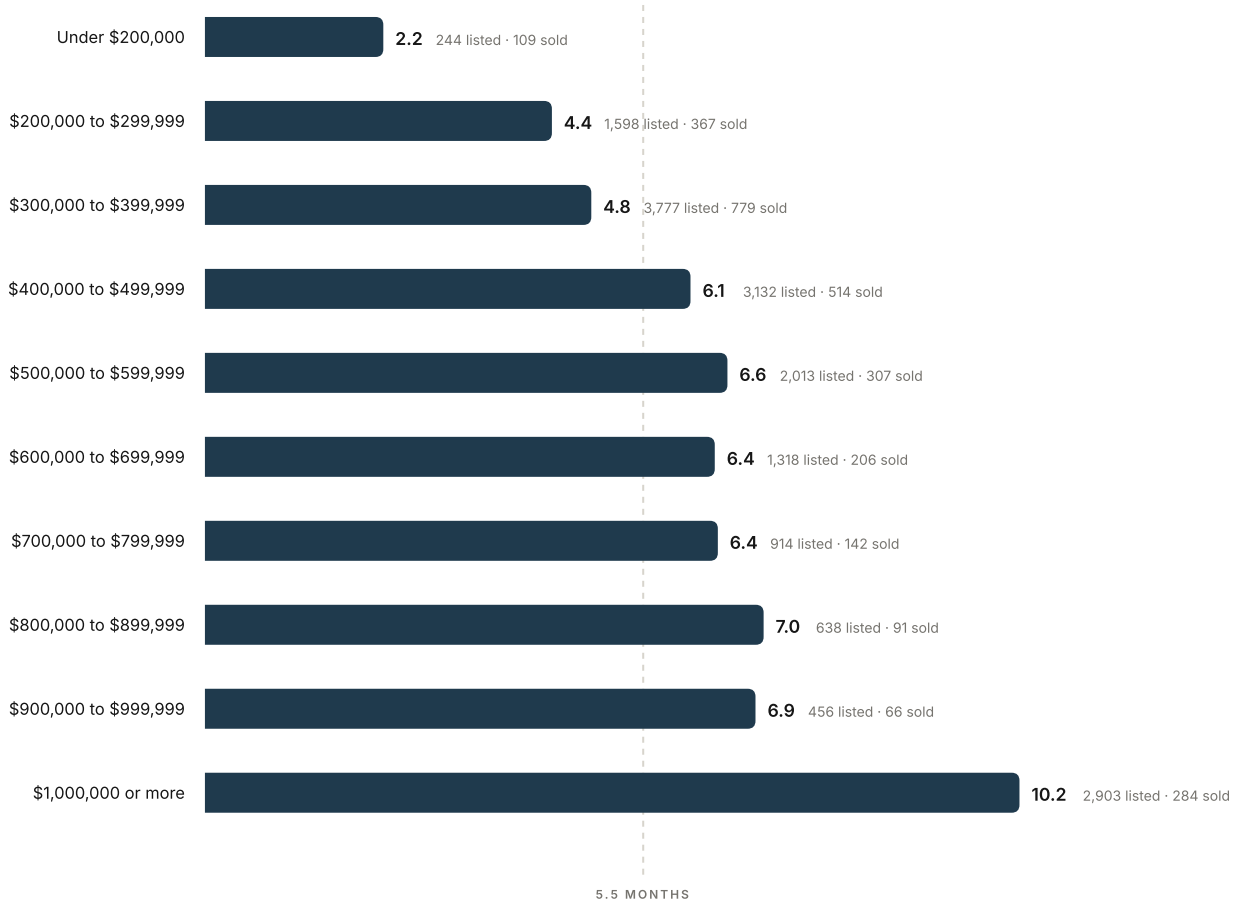


Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot 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 January. The result shows where inventory is scarce and where buyers have more choice.

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



UNDER $500,000

Listings in these ranges equaled 4.9 months of January's sales. Entry and mid-priced homes continue to carry the most transactions in the region.

$700,000 AND ABOVE

Listings equaled 8.4 months of January'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, 284 single-family homes sold for $1 million or more in January, against 2,903 active listings at that level at month end.

BY PRICE RANGE, FIVE COUNTIES

RANGE	SOLD	NEW LISTINGS	ACTIVE
$1M to $1.25M	83	189	559
$1.25M to $1.5M	59	166	513
$1.5M to $2M	59	175	571
$2M to $3M	49	157	547
$3M to $5M	22	112	424
$5M to $10M	11	43	220
$10M and above	1	16	69

$1M AND ABOVE, BY COUNTY

COUNTY	SOLD	YOY	ACTIVE	YOY
Hillsborough	68	+28.3%	549	+9.8%
Pinellas	70	−2.8%	772	+26.4%
Pasco	14	−17.6%	132	+38.9%
Manatee	54	−15.6%	626	+21.3%
Sarasota	78	−4.9%	824	+9.1%

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	20%	4	0.76	45%	1	0.53
Pinellas	39%	6	0.71	53%	0	0.55
Pasco	26%	9	0.69	51%	0	0.59
Manatee	32%	2	0.70	62%	1	0.53
Sarasota	46%	3	0.69	69%	3	0.52

CASH SHARE
The share of closings paid entirely in cash. Higher readings often point to investors, second-home buyers and downsizers with equity. Regionally, 32 percent of single-family and 56 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 January 2026 data was released on Tuesday, February 17, 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 January 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 January 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

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TAMPA BAY MARKET INTELLIGENCE

January 2026

MIDDLETON
TAMPA BAY

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COMPASS

Source: Florida Realtors® Monthly Market Detail, January 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.