

TAMPA BAY MARKET INTELLIGENCE · MONTHLY REPORT

July 2026

MIDDLETON
TAMPA BAY

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

DATA RELEASED MONDAY, AUGUST 17, 2026

The month *in numbers.*

4,556
SINGLE-FAMILY SALES
up 0.7% year over year

$2.75B
SINGLE-FAMILY VOLUME
up 8.4% year over year

16,534
ACTIVE SF LISTINGS
down 13.0% year over year

1,617
CONDO AND TOWNHOME SALES
up 9.5% year over year

KEY TAKEAWAYS

- Single-family closings across the five counties totaled 4,556, up 0.7 percent from a year earlier, with $2.75 billion in dollar volume.
- Pinellas posted the strongest single-family median price change at +7.8%, while Hillsborough posted the weakest at 0.0%.
- Single-family supply ranged from 3.5 months in Pinellas to 4.3 months in Pasco.
- Condominium and townhome closings totaled 1,617, up 9.5 percent from a year earlier, and condo supply ranged from 5.4 to 6.7 months.
- Active single-family inventory stood at 16,534 listings, down 13.0 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	4,556 +0.7%	$2.75 B +8.4%	$603,907 +7.6%	5,471 −0.2%	4,304 −2.9%	16,534 −13.0%	24%
Condo and Townhome	1,617 +9.5%	$679.8 M +30.4%	$420,408 +19.1%	2,018 −0.7%	1,518 +7.3%	9,643 −7.8%	49%

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 July *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 July, regional single-family sales were up 0.7 percent from a year earlier and the regional average price was up 7.6 percent from a year earlier. Active inventory was down 13.0 percent on the year.

WHAT STOOD OUT

Pinellas led the region in single-family price growth at +7.8% year over year. Pinellas had the tightest supply at 3.5 months. Homes moved fastest in Hillsborough, at a median 34 days to contract, and slowest in Sarasota, at 52 days.

Negotiating room varied as well. Sellers received a median 96.7% of original list price in Hillsborough and 94.2% 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 and Pasco 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 July 2026 value with its change from July 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	1,358 +1.3%	$430,000 0.0%	$568,293 +4.6%	34 0.0%	96.7% +0.3%	4,710 −7.6%	3.9 −7.1%	18%
Pinellas	941 +3.7%	$469,000 +7.8%	$618,772 +7.0%	34 −19.0%	95.8% +2.7%	3,076 −23.0%	3.5 −27.1%	26%
Pasco	819 −11.7%	$390,000 +0.8%	$439,169 +2.7%	43 +10.3%	96.5% −0.1%	3,288 −2.8%	4.3 +7.5%	22%
Manatee	694 +11.2%	$495,000 +1.0%	$675,943 +7.1%	50 −13.8%	95.2% +1.6%	2,724 −7.9%	4.1 −14.6%	28%
Sarasota	744 +2.9%	$493,500 +5.0%	$764,307 +11.6%	52 −17.5%	94.2% +3.5%	2,736 −23.4%	3.9 −30.4%	34%
Region	4,556 +0.7%	By county	$603,907 +7.6%	By county	By county	16,534 −13.0%	By county	24%

5,471

NEW LISTINGS

down 0.2% year over year, five counties

4,304

NEW PENDING SALES

down 2.9% year over year, five counties

30,400

CLOSED SALES YEAR TO DATE

January through July, five counties

YEAR TO DATE, JANUARY THROUGH JULY

8,691
HILLSBOROUGH
down 1.6% in closed sales

6,107
PINELLAS
down 3.3% in closed sales

5,468
PASCO
down 12.3% in closed sales

4,878
MANATEE
up 9.5% in closed sales

5,256
SARASOTA
up 6.1% 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.

Condominiums and Townhomes, *county by county.*

Each figure shows the July 2026 value with its change from July 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	322 −16.6%	$280,000 −1.7%	$399,657 +20.6%	55 +3.8%	95.1% +0.7%	1,895 −4.1%	5.9 0.0%	36%
Pinellas	578 +28.2%	$272,000 +8.8%	$410,441 +0.1%	69 −1.4%	91.9% +1.1%	3,675 −7.3%	6.7 −21.2%	54%
Pasco	161 −19.5%	$249,900 −5.2%	$238,545 −8.9%	78 +73.3%	93.3% −2.7%	1,014 +1.6%	6.4 +36.2%	39%
Manatee	238 +18.4%	$313,950 −1.9%	$342,030 +3.7%	70 0.0%	93.2% +2.4%	1,277 −15.8%	5.4 −22.9%	49%
Sarasota	318 +33.1%	$340,000 +13.3%	$610,513 +62.7%	92 +27.8%	90.8% +2.8%	1,782 −10.9%	5.6 −25.3%	60%
Region	1,617 +9.5%	By county	$420,408 +19.1%	By county	By county	9,643 −7.8%	By county	49%

2,018

NEW LISTINGS

down 0.7% year over year, five counties

1,518

NEW PENDING SALES

up 7.3% year over year, five counties

11,977

CLOSED SALES YEAR TO DATE

January through July, five counties

YEAR TO DATE, JANUARY THROUGH JULY

2,298
HILLSBOROUGH
down 5.4% in closed sales

4,251
PINELLAS
up 23.4% in closed sales

1,088
PASCO
down 24.5% in closed sales

1,801
MANATEE
up 6.3% in closed sales

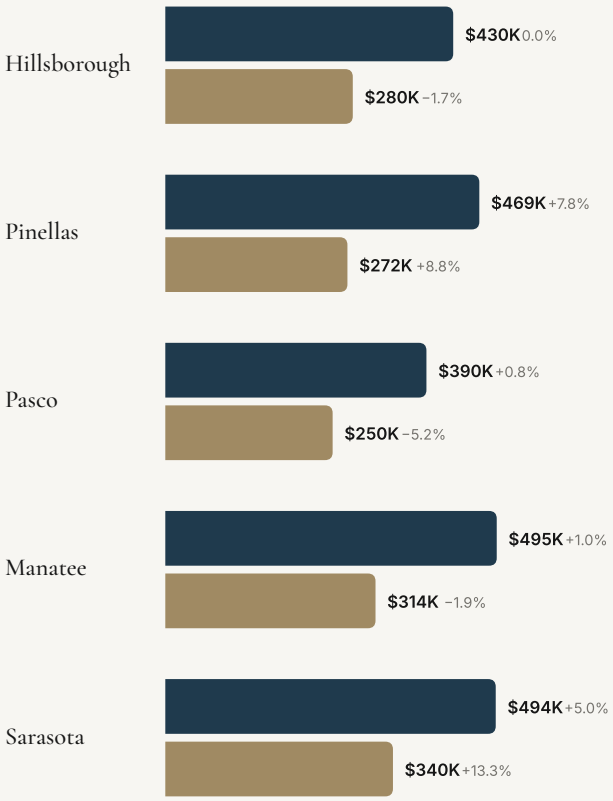
2,539
SARASOTA
up 23.9% in closed sales

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.

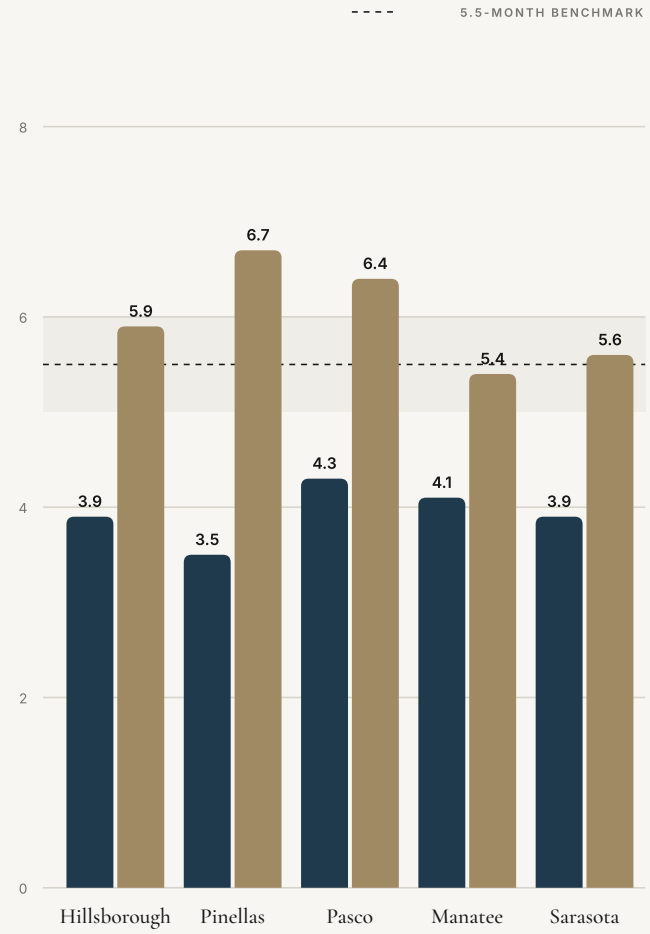
Where values sit, *and how much is for sale.*

SINGLE-FAMILY CONDO / TOWNHOME

MEDIAN SALE PRICE, JULY 2026, CHANGE YEAR OVER YEAR



MONTHS SUPPLY OF INVENTORY, JULY 2026



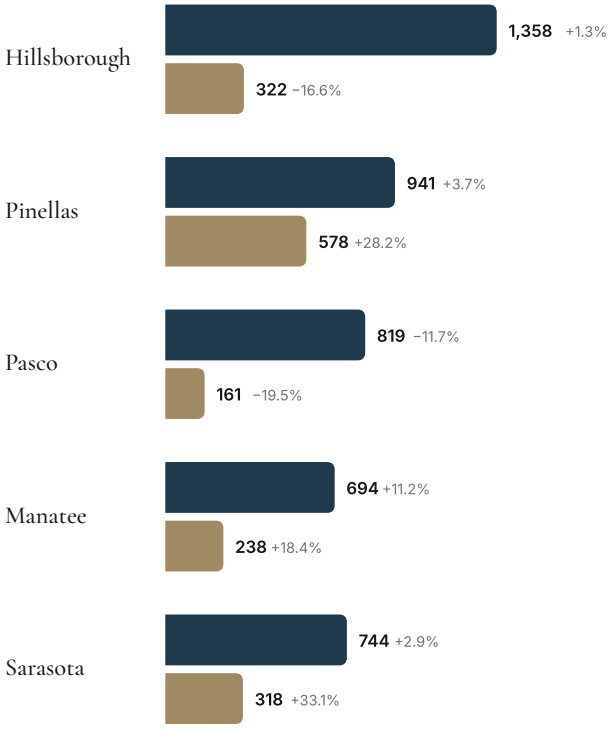
Median prices are the clearest single measure of value, but they also reflect the mix of homes that happened to sell in a given month. A month with more waterfront or new-construction closings will lift the median even if individual values are flat. That is why we pair price with supply.

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 3.5 to 4.3 months. Condominium supply ranged from 5.4 to 6.7 months.

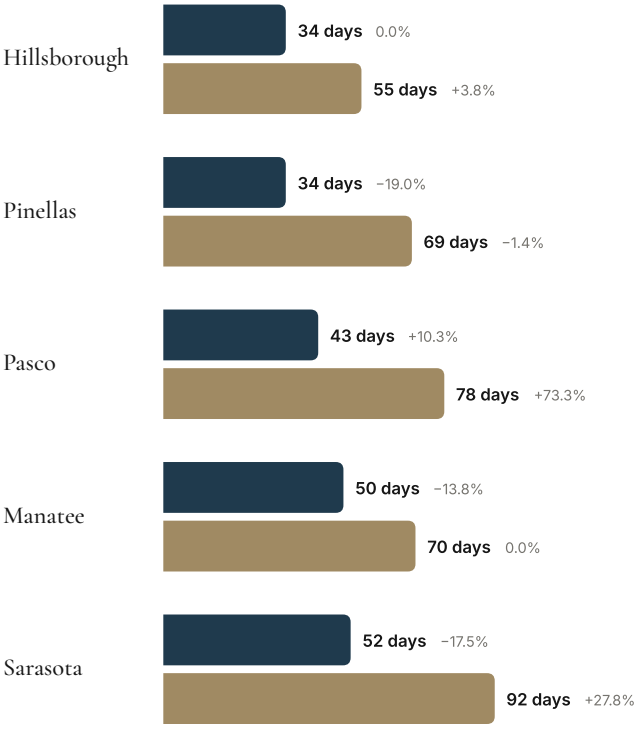
How many sold, *and how quickly.*

SINGLE-FAMILY CONDO / TOWNHOME

CLOSED SALES, JULY 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 July, single-family homes went under contract fastest in Hillsborough at 34 days and slowest in Sarasota at 52 days. Rising days to contract typically precede softer pricing, and falling days typically precede firmer pricing.

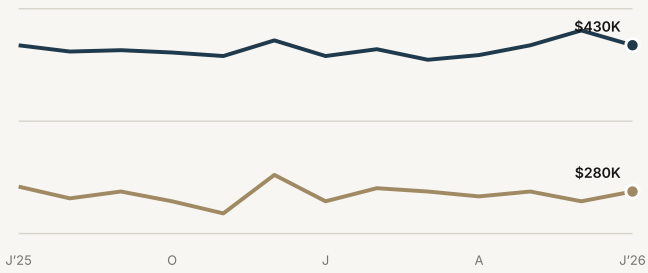
THIRTEEN-MONTH PRICE TRENDS

The line matters *more than the point.*

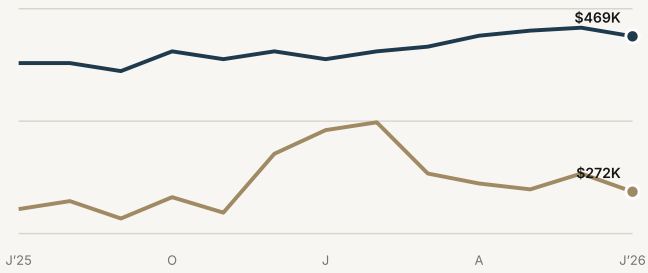
Median sale price for each county from July 2025 through July 2026. Reading a full year at once separates seasonal swings from genuine shifts in value.

SINGLE-FAMILY CONDO / TOWNHOME

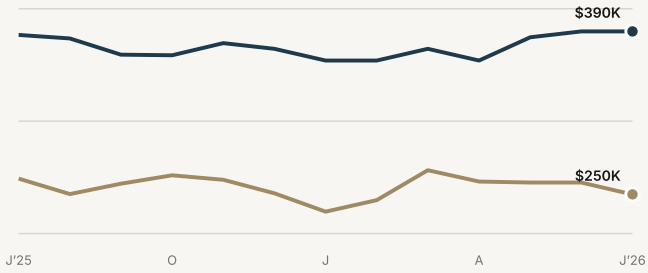
Hillsborough



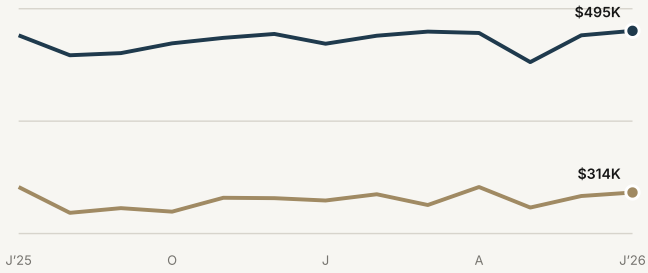
Pinellas



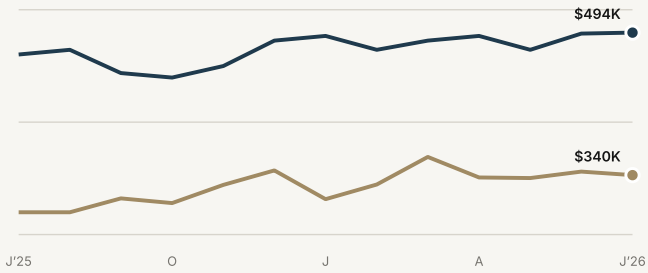
Pasco



Manatee



Sarasota



HOW TO READ THESE

Each line shows thirteen monthly medians. The labeled point is July 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 · JULY 2026

Hillsborough *County*

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

SINGLE-FAMILY HOMES

Closed sales	1,358	+1.3%
Median sale price	$430,000	0.0%
Average sale price	$568,293	+4.6%
Dollar volume	$771.7 M	+5.9%
Median days to contract	34	0.0%
Median days to sale	74	−2.6%
% of original list received	96.7%	+0.3%
New listings	1,674	−2.3%
New pending sales	1,197	−10.7%
Active listings	4,710	−7.6%
Months supply	3.9	−7.1%
Cash share of sales	18%	

CONDOS AND TOWNHOMES

Closed sales	322	−16.6%
Median sale price	$280,000	−1.7%
Average sale price	$399,657	+20.6%
Dollar volume	$128.7 M	+0.6%
Median days to contract	55	+3.8%
Median days to sale	97	+4.3%
% of original list received	95.1%	+0.7%
New listings	522	+3.6%
New pending sales	301	−13.0%
Active listings	1,895	−4.1%
Months supply	5.9	0.0%
Cash share of sales	36%	

What the numbers *are saying.*

Single-family. Single-family closings in Hillsborough County totaled 1,358 in July, up 1.3 percent from a year earlier. The median sale price settled at $430,000, unchanged from a year earlier, and sellers received a median 96.7% of original list price. Homes went under contract in a median 34 days. With 4,710 active listings, the county held 3.9 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 322 closings, down 16.6 percent from a year earlier, at a median of $280,000. Supply stood at 5.9 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

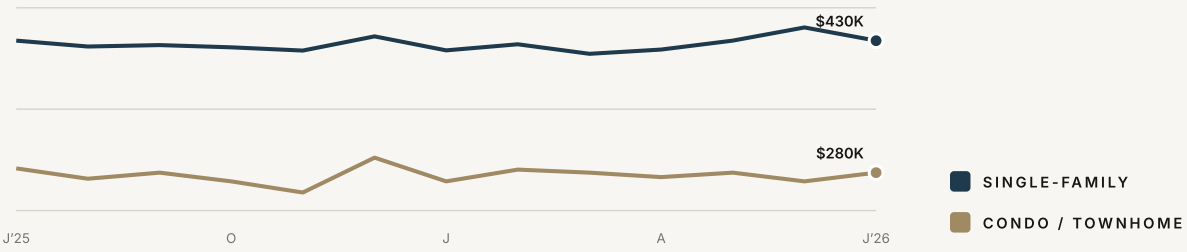
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	29	−14.7%	48	35	1.2
$200,000 to $299,999	125	−5.3%	27	362	2.9
$300,000 to $399,999	396	−2.5%	32	1,308	3.3
$400,000 to $499,999	294	−4.5%	34	1,015	3.5
$500,000 to $599,999	145	−6.5%	38	611	4.2
$600,000 to $699,999	100	+14.9%	36	317	3.2
$700,000 to $799,999	71	−5.3%	34	205	2.9
$800,000 to $899,999	43	+30.3%	48	173	4.0
$900,000 to $999,999	31	+63.2%	25	100	3.2
$1,000,000 or more	124	+34.8%	40	584	4.7

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	77	+5.5%	69	517	6.7
$200,000 to $299,999	98	−35.5%	56	574	5.9
$300,000 to $399,999	68	−21.8%	52	292	4.3
$400,000 to $499,999	26	+23.8%	31	129	5.0
$500,000 to $599,999	11	−26.7%	56	76	6.9
$600,000 to $699,999	12	+20.0%	106	68	5.7
$700,000 to $799,999	7	−36.4%	20	41	5.9
$800,000 to $899,999	1	−87.5%	227	27	27.0
$900,000 to $999,999	3	−40.0%	52	25	8.3
$1,000,000 or more	19	+375.0%	47	146	7.7

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 · JULY 2026

Pinellas *County*

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

SINGLE-FAMILY HOMES		
Closed sales	941	+3.7%
Median sale price	$469,000	+7.8%
Average sale price	$618,772	+7.0%
Dollar volume	$582.3 M	+11.0%
Median days to contract	34	−19.0%
Median days to sale	72	−6.5%
% of original list received	95.8%	+2.7%
New listings	1,097	−5.2%
New pending sales	888	−0.9%
Active listings	3,076	−23.0%
Months supply	3.5	−27.1%
Cash share of sales	26%	

CONDOS AND TOWNHOMES		
Closed sales	578	+28.2%
Median sale price	$272,000	+8.8%
Average sale price	$410,441	+0.1%
Dollar volume	$237.2 M	+28.2%
Median days to contract	69	−1.4%
Median days to sale	107	+2.9%
% of original list received	91.9%	+1.1%
New listings	679	−7.5%
New pending sales	517	+5.7%
Active listings	3,675	−7.3%
Months supply	6.7	−21.2%
Cash share of sales	54%	

What the numbers *are saying*.

Single-family. Single-family closings in Pinellas County totaled 941 in July, up 3.7 percent from a year earlier. The median sale price settled at $469,000, up 7.8 percent from a year earlier, and sellers received a median 95.8% of original list price. Homes went under contract in a median 34 days. With 3,076 active listings, the county held 3.5 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 578 closings, up 28.2 percent from a year earlier, at a median of $272,000. Supply stood at 6.7 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

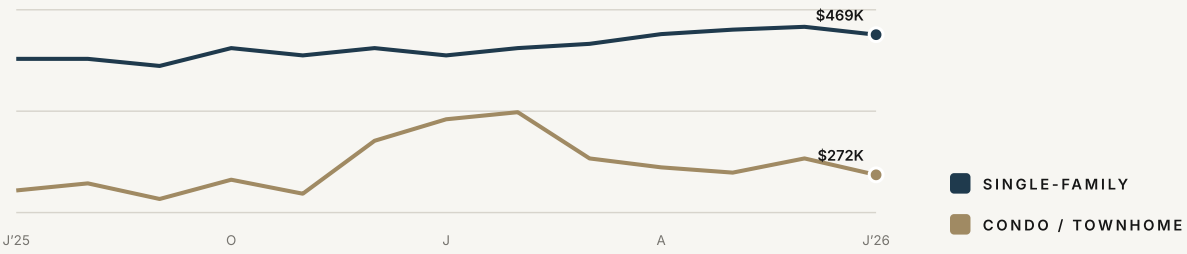
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	13	−62.9%	11	29	2.2
$200,000 to $299,999	100	+3.1%	26	189	1.9
$300,000 to $399,999	230	−6.9%	36	528	2.3
$400,000 to $499,999	171	+8.2%	26	549	3.2
$500,000 to $599,999	108	−12.9%	38	384	3.6
$600,000 to $699,999	104	+57.6%	37	264	2.5
$700,000 to $799,999	56	+47.4%	32	183	3.3
$800,000 to $899,999	37	+12.1%	41	117	3.2
$900,000 to $999,999	21	+5.0%	75	105	5.0
$1,000,000 or more	101	+13.5%	75	728	7.2

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	183	+12.3%	76	1,156	6.3
$200,000 to $299,999	133	+20.9%	53	775	5.8
$300,000 to $399,999	88	+33.3%	69	446	5.1
$400,000 to $499,999	45	+45.2%	50	289	6.4
$500,000 to $599,999	24	+60.0%	138	190	7.9
$600,000 to $699,999	26	+73.3%	156	161	6.2
$700,000 to $799,999	16	+100.0%	45	130	8.1
$800,000 to $899,999	8	0.0%	44	85	10.6
$900,000 to $999,999	11	+83.3%	120	71	6.5
$1,000,000 or more	44	+51.7%	73	372	8.5

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 · JULY 2026

Pasco *County*

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

SINGLE-FAMILY HOMES		
Closed sales	819	−11.7%
Median sale price	$390,000	+0.8%
Average sale price	$439,169	+2.7%
Dollar volume	$359.7 M	−9.3%
Median days to contract	43	+10.3%
Median days to sale	84	+5.0%
% of original list received	96.5%	−0.1%
New listings	1,090	−4.8%
New pending sales	842	−0.8%
Active listings	3,288	−2.8%
Months supply	4.3	+7.5%
Cash share of sales	22%	

CONDOS AND TOWNHOMES		
Closed sales	161	−19.5%
Median sale price	$249,900	−5.2%
Average sale price	$238,545	−8.9%
Dollar volume	$38.4 M	−26.7%
Median days to contract	78	+73.3%
Median days to sale	114	+35.7%
% of original list received	93.3%	−2.7%
New listings	239	−2.4%
New pending sales	183	+0.5%
Active listings	1,014	+1.6%
Months supply	6.4	+36.2%
Cash share of sales	39%	

What the numbers *are saying.*

Single-family. Single-family closings in Pasco County totaled 819 in July, down 11.7 percent from a year earlier. The median sale price settled at $390,000, up 0.8 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 3,288 active listings, the county held 4.3 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 161 closings, down 19.5 percent from a year earlier, at a median of $249,900. Supply stood at 6.4 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

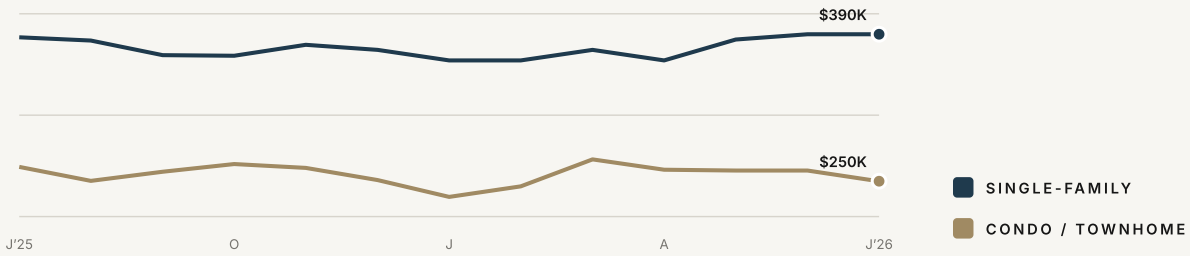
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	57	0.0%	24	93	1.6
$200,000 to $299,999	158	−8.7%	43	689	4.4
$300,000 to $399,999	209	−24.0%	41	933	4.5
$400,000 to $499,999	157	−14.7%	43	591	3.8
$500,000 to $599,999	109	+2.8%	66	375	3.4
$600,000 to $699,999	46	−8.0%	41	189	4.1
$700,000 to $799,999	24	−17.2%	50	148	6.2
$800,000 to $899,999	23	−8.0%	26	87	3.8
$900,000 to $999,999	14	+27.3%	61	45	3.2
$1,000,000 or more	22	+22.2%	32	138	6.3

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	50	+42.9%	82	371	7.4
$200,000 to $299,999	72	−25.0%	69	351	4.9
$300,000 to $399,999	37	−43.1%	68	233	6.3
$400,000 to $499,999	1	−66.7%	124	40	40.0
$500,000 to $599,999	1	0.0%	90	5	5.0
$600,000 to $699,999	0	N/A	·	6	·
$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	·	3	·

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 · JULY 2026

Manatee *County*

BRADENTON, LAKEWOOD RANCH, PALMETTO AND ANNA MARIA ISLAND

SINGLE-FAMILY HOMES

Closed sales	694 +11.2%
Median sale price	$495,000 +1.0%
Average sale price	$675,943 +7.1%
Dollar volume	$469.1 M +19.1%
Median days to contract	50 −13.8%
Median days to sale	100 −2.0%
% of original list received	95.2% +1.6%
New listings	821 +9.6%
New pending sales	653 −2.0%
Active listings	2,724 −7.9%
Months supply	4.1 −14.6%
Cash share of sales	28%

CONDOS AND TOWNHOMES

Closed sales	238 +18.4%
Median sale price	$313,950 −1.9%
Average sale price	$342,030 +3.7%
Dollar volume	$81.4 M +22.7%
Median days to contract	70 0.0%
Median days to sale	109 −1.8%
% of original list received	93.2% +2.4%
New listings	294 +17.6%
New pending sales	236 +32.6%
Active listings	1,277 −15.8%
Months supply	5.4 −22.9%
Cash share of sales	49%

What the numbers *are saying.*

Single-family. Single-family closings in Manatee County totaled 694 in July, up 11.2 percent from a year earlier. The median sale price settled at $495,000, up 1.0 percent from a year earlier, and sellers received a median 95.2% of original list price. Homes went under contract in a median 50 days. With 2,724 active listings, the county held 4.1 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 238 closings, up 18.4 percent from a year earlier, at a median of $313,950. Supply stood at 5.4 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

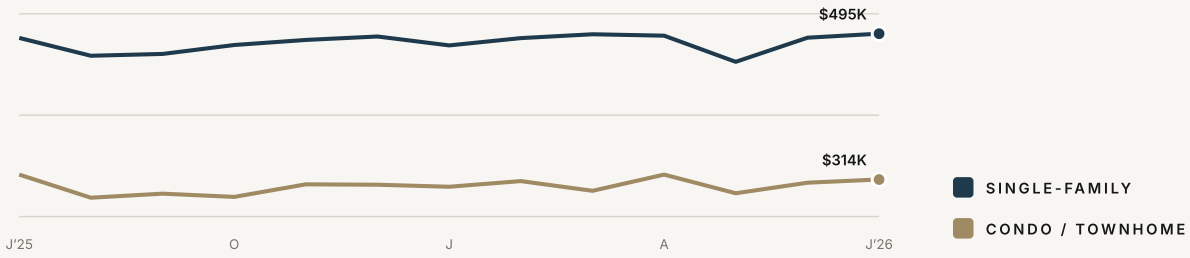
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	6	+100.0%	16	12	2.0
$200,000 to $299,999	36	+24.1%	67	74	2.1
$300,000 to $399,999	163	+2.5%	59	582	3.6
$400,000 to $499,999	150	+10.3%	44	548	3.7
$500,000 to $599,999	82	−8.9%	44	353	4.3
$600,000 to $699,999	81	+68.8%	53	223	2.8
$700,000 to $799,999	36	−2.7%	32	173	4.8
$800,000 to $899,999	38	+22.6%	60	138	3.6
$900,000 to $999,999	25	+4.2%	40	78	3.1
$1,000,000 or more	77	+14.9%	46	543	7.1

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	48	+33.3%	68	329	6.9
$200,000 to $299,999	58	+20.8%	78	304	5.2
$300,000 to $399,999	74	−1.3%	63	303	4.1
$400,000 to $499,999	30	+36.4%	54	128	4.3
$500,000 to $599,999	8	−11.1%	147	69	8.6
$600,000 to $699,999	5	+66.7%	130	45	9.0
$700,000 to $799,999	5	0.0%	205	27	5.4
$800,000 to $899,999	2	+100.0%	154	18	9.0
$900,000 to $999,999	3	+200.0%	6	16	5.3
$1,000,000 or more	5	+400.0%	103	38	7.6

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 · JULY 2026

Sarasota *County*

SARASOTA, VENICE, NORTH PORT AND LONGBOAT KEY

SINGLE-FAMILY HOMES		
Closed sales	744	+2.9%
Median sale price	$493,500	+5.0%
Average sale price	$764,307	+11.6%
Dollar volume	$568.6 M	+14.8%
Median days to contract	52	−17.5%
Median days to sale	93	−11.4%
% of original list received	94.2%	+3.5%
New listings	789	+9.6%
New pending sales	724	+6.6%
Active listings	2,736	−23.4%
Months supply	3.9	−30.4%
Cash share of sales	34%	

CONDOS AND TOWNHOMES		
Closed sales	318	+33.1%
Median sale price	$340,000	+13.3%
Average sale price	$610,513	+62.7%
Dollar volume	$194.1 M	+116.5%
Median days to contract	92	+27.8%
Median days to sale	138	+22.1%
% of original list received	90.8%	+2.8%
New listings	284	−5.3%
New pending sales	281	+27.7%
Active listings	1,782	−10.9%
Months supply	5.6	−25.3%
Cash share of sales	60%	

What the numbers *are saying.*

Single-family. Single-family closings in Sarasota County totaled 744 in July, up 2.9 percent from a year earlier. The median sale price settled at $493,500, up 5.0 percent from a year earlier, and sellers received a median 94.2% of original list price. Homes went under contract in a median 52 days. With 2,736 active listings, the county held 3.9 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 318 closings, up 33.1 percent from a year earlier, at a median of $340,000. Supply stood at 5.6 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

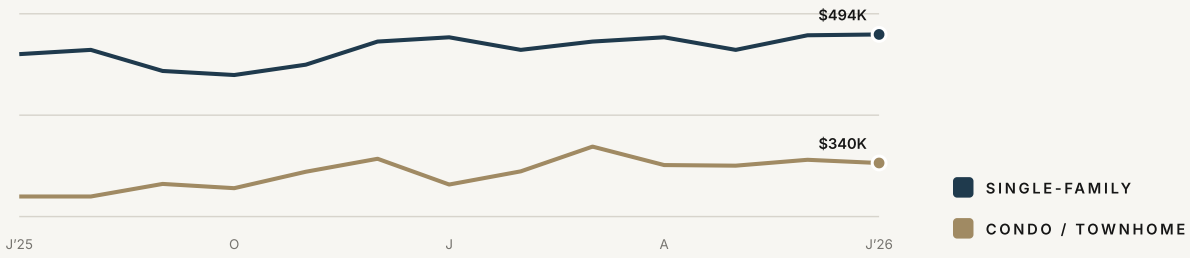
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	7	−58.8%	35	31	4.4
$200,000 to $299,999	79	+17.9%	53	222	2.8
$300,000 to $399,999	172	−6.0%	53	587	3.4
$400,000 to $499,999	123	−1.6%	43	435	3.5
$500,000 to $599,999	83	+9.2%	55	286	3.4
$600,000 to $699,999	59	−11.9%	55	206	3.5
$700,000 to $799,999	43	−15.7%	36	145	3.4
$800,000 to $899,999	31	+6.9%	53	102	3.3
$900,000 to $999,999	26	+23.8%	32	96	3.7
$1,000,000 or more	121	+39.1%	62	626	5.2

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	63	+6.8%	92	240	3.8
$200,000 to $299,999	74	+27.6%	74	417	5.6
$300,000 to $399,999	70	+1.4%	74	341	4.9
$400,000 to $499,999	33	+43.5%	87	166	5.0
$500,000 to $599,999	16	+220.0%	108	110	6.9
$600,000 to $699,999	4	0.0%	136	90	22.5
$700,000 to $799,999	12	+300.0%	129	43	3.6
$800,000 to $899,999	1	−50.0%	368	43	43.0
$900,000 to $999,999	4	0.0%	187	41	10.2
$1,000,000 or more	41	+241.7%	123	291	7.1

Sarasota median sale price, thirteen months

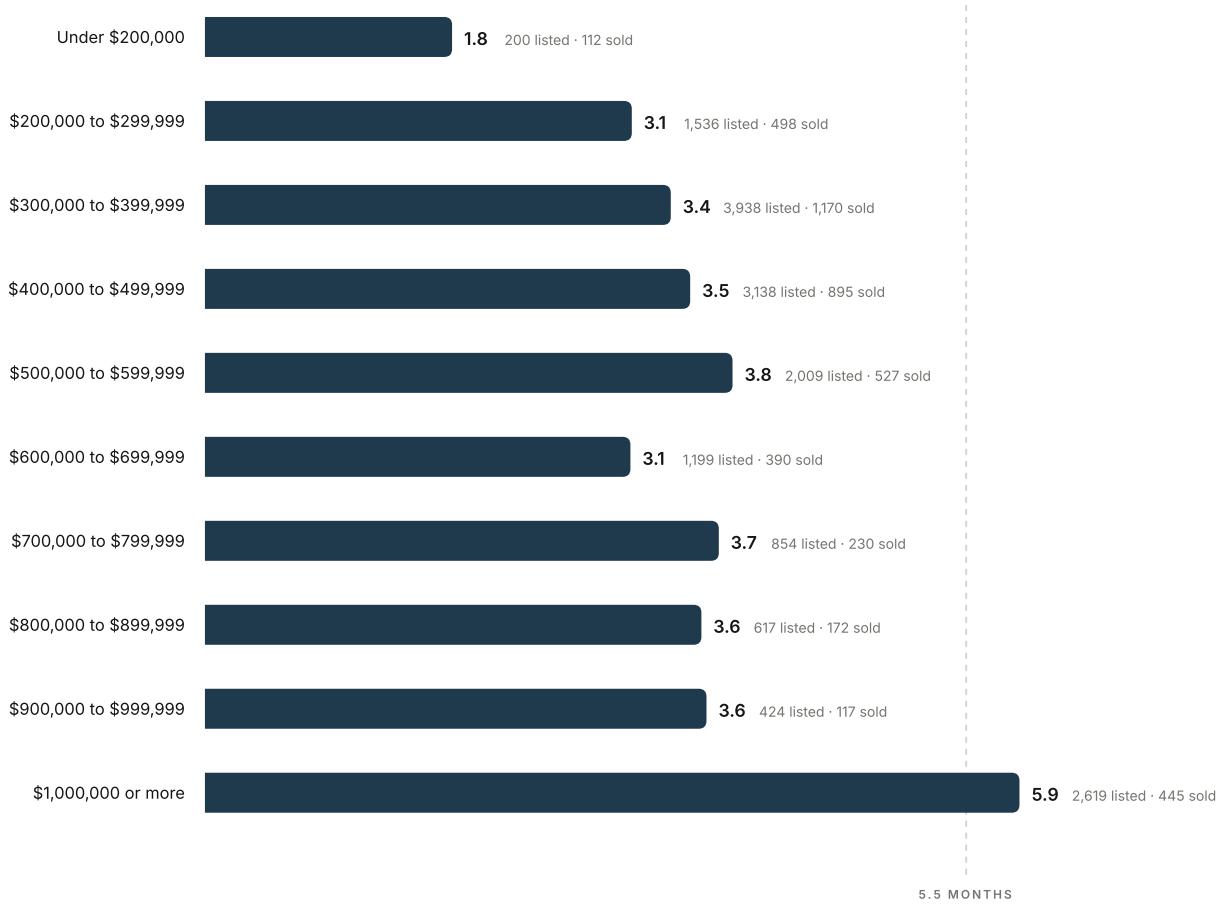


Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot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

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



UNDER $500,000

Listings in these ranges equaled 3.3 months of July's sales. Entry and mid-priced homes continue to carry the most transactions in the region.

$700,000 AND ABOVE

Listings equaled 4.7 months of July'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, 445 single-family homes sold for $1 million or more in July, against 2,619 active listings at that level at month end.

BY PRICE RANGE, FIVE COUNTIES

RANGE	SOLD	NEW LISTINGS	ACTIVE
$1M to $1.25M	148	158	553
$1.25M to $1.5M	105	130	495
$1.5M to $2M	93	111	508
$2M to $3M	50	81	448
$3M to $5M	37	41	373
$5M to $10M	8	13	181
$10M and above	4	8	61

$1M AND ABOVE, BY COUNTY

COUNTY	SOLD	YOY	ACTIVE	YOY
Hillsborough	124	+34.8%	584	−14.1%
Pinellas	101	+13.5%	728	−10.9%
Pasco	22	+22.2%	138	−4.2%
Manatee	77	+14.9%	543	−9.8%
Sarasota	121	+39.1%	626	−15.2%

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%	22	0.72	36%	2	0.58
Pinellas	26%	14	0.81	54%	7	0.76
Pasco	22%	11	0.77	39%	3	0.77
Manatee	28%	8	0.80	49%	0	0.80
Sarasota	34%	11	0.92	60%	5	0.99

CASH SHARE
The share of closings paid entirely in cash. Higher readings often point to investors, second-home buyers and downsizers with equity. Regionally, 24 percent of single-family and 49 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 July 2026 data was released on Monday, August 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 July 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 July 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

July 2026

MIDDLETON
TAMPA BAY

PEOPLE · PLANET · PURPOSE

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

COMPASS

Source: Florida Realtors® Monthly Market Detail, July 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.