

TAMPA BAY MARKET INTELLIGENCE · MONTHLY REPORT

June 2026

MIDDLETON
TAMPA BAY

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

DATA RELEASED FRIDAY, JULY 17, 2026

The month *in numbers.*

5,031
SINGLE-FAMILY SALES
up 4.2% year over year

$3.09B
SINGLE-FAMILY VOLUME
up 13.1% year over year

16,142
ACTIVE SF LISTINGS
down 18.2% year over year

1,825
CONDO AND TOWNHOME SALES
up 15.3% year over year

KEY TAKEAWAYS

- Single-family closings across the five counties totaled 5,031, up 4.2 percent from a year earlier, with $3.09 billion in dollar volume.
- Manatee posted the strongest single-family median price change at +11.4%, while Hillsborough posted the weakest at +1.2%.
- Single-family supply ranged from 3.5 months in Pinellas to 4.1 months in Sarasota.
- Condominium and townhome closings totaled 1,825, up 15.3 percent from a year earlier, and condo supply ranged from 5.5 to 7.0 months.
- Active single-family inventory stood at 16,142 listings, down 18.2 percent from a year earlier.

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THE FIVE-COUNTY REGION

SEGMENT	CLOSED SALES	DOLLAR VOLUME	AVERAGE PRICE	NEW LISTINGS	NEW PENDING	ACTIVE LISTINGS	CASH SHARE
Single-Family	5,031 +4.2%	$3.09 B +13.1%	$613,973 +8.5%	5,545 −1.6%	4,460 +0.9%	16,142 −18.2%	25%
Condo and Townhome	1,825 +15.3%	$782.3 M +28.9%	$428,658 +11.8%	2,215 +9.1%	1,650 +12.1%	9,888 −10.4%	52%

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 June *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 June, regional single-family sales were up 4.2 percent from a year earlier and the regional average price was up 8.5 percent from a year earlier. Active inventory was down 18.2 percent on the year.

WHAT STOOD OUT

Manatee led the region in single-family price growth at +11.4% year over year. Pinellas had the tightest supply at 3.5 months. Homes moved fastest in Pinellas, at a median 29 days to contract, and slowest in Sarasota, at 47 days.

Negotiating room varied as well. Sellers received a median 97.2% of original list price in Hillsborough and 94.4% 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 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 June 2026 value with its change from June 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	1,457 −1.0%	$445,155 +1.2%	$610,895 +6.6%	31 +10.7%	97.2% 0.0%	4,418 −14.9%	3.7 −11.9%	18%
Pinellas	975 +3.9%	$480,000 +5.5%	$653,234 +9.3%	29 −19.4%	96.1% +2.0%	2,987 −26.6%	3.5 −28.6%	29%
Pasco	904 −10.7%	$390,000 +1.3%	$436,895 +2.5%	40 +2.6%	96.4% +0.3%	3,161 −4.9%	4.1 +2.5%	21%
Manatee	890 +26.2%	$490,000 +11.4%	$648,560 +11.2%	45 −19.6%	95.8% +1.6%	2,706 −15.3%	4.1 −21.2%	25%
Sarasota	805 +15.2%	$492,450 +8.2%	$732,527 +5.7%	47 −21.7%	94.4% +2.4%	2,870 −27.4%	4.1 −34.9%	39%
Region	5,031 +4.2%	By county	$613,973 +8.5%	By county	By county	16,142 −18.2%	By county	25%

5,545
NEW LISTINGS
down 1.6% year over year, five counties

4,460
NEW PENDING SALES
up 0.9% year over year, five counties

25,844
CLOSED SALES YEAR TO DATE
January through June, five counties

YEAR TO DATE, JANUARY THROUGH JUNE

7,333
HILLSBOROUGH
down 2.1% in closed sales

5,166
PINELLAS
down 4.5% in closed sales

4,649
PASCO
down 12.4% in closed sales

4,184
MANATEE
up 9.3% in closed sales

4,512
SARASOTA
up 6.7% 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 June 2026 value with its change from June 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	415 +16.6%	$270,000 −4.4%	$457,577 +33.2%	41 −4.7%	95.5% +0.5%	1,783 −11.2%	5.5 −8.3%	42%
Pinellas	596 +16.6%	$295,000 +11.3%	$414,527 +11.9%	71 +9.2%	91.9% +0.3%	3,806 −8.2%	7.0 −18.6%	59%
Pasco	191 −1.0%	$260,000 0.0%	$243,530 −6.1%	52 +8.3%	94.4% −0.7%	1,013 −1.3%	6.3 +31.3%	39%
Manatee	259 +11.2%	$310,000 −0.9%	$349,674 +4.7%	84 +23.5%	92.1% +0.1%	1,327 −18.2%	5.7 −23.0%	50%
Sarasota	364 +25.5%	$343,750 −7.5%	$571,877 −1.0%	71 −1.4%	92.0% +2.6%	1,959 −12.1%	6.3 −24.1%	59%
Region	1,825 +15.3%	By county	$428,658 +11.8%	By county	By county	9,888 −10.4%	By county	52%

2,215
NEW LISTINGS
up 9.1% year over year, five counties

1,650
NEW PENDING SALES
up 12.1% year over year, five counties

10,360
CLOSED SALES YEAR TO DATE
January through June, five counties

YEAR TO DATE, JANUARY THROUGH JUNE

1,976
HILLSBOROUGH
down 3.3% in closed sales

3,673
PINELLAS
up 22.7% in closed sales

927
PASCO
down 25.4% in closed sales

1,563
MANATEE
up 4.6% in closed sales

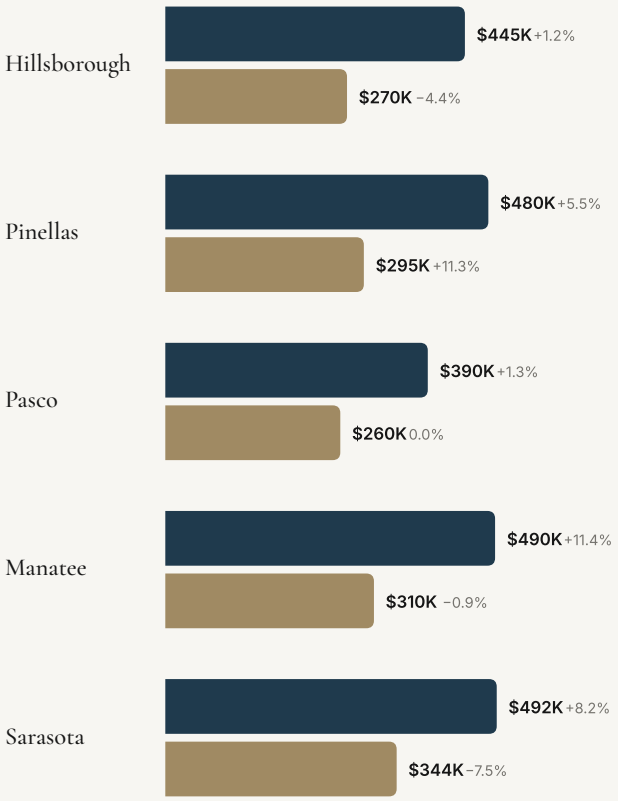
2,221
SARASOTA
up 22.7% in closed sales

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.

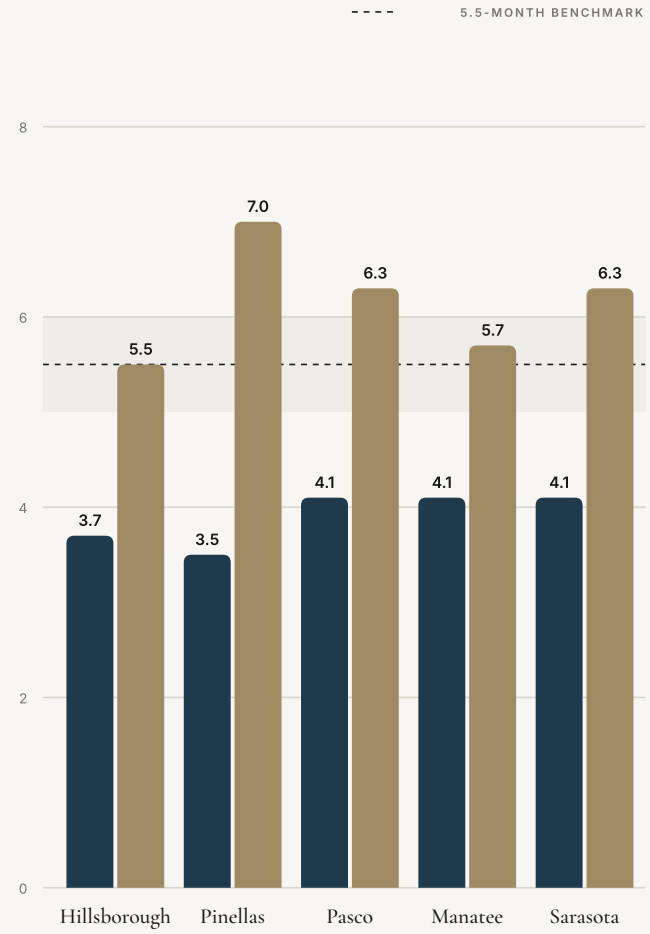
Where values sit, *and how much is for sale.*

SINGLE-FAMILY CONDO / TOWNHOME

MEDIAN SALE PRICE, JUNE 2026, CHANGE YEAR OVER YEAR



MONTHS SUPPLY OF INVENTORY, JUNE 2026



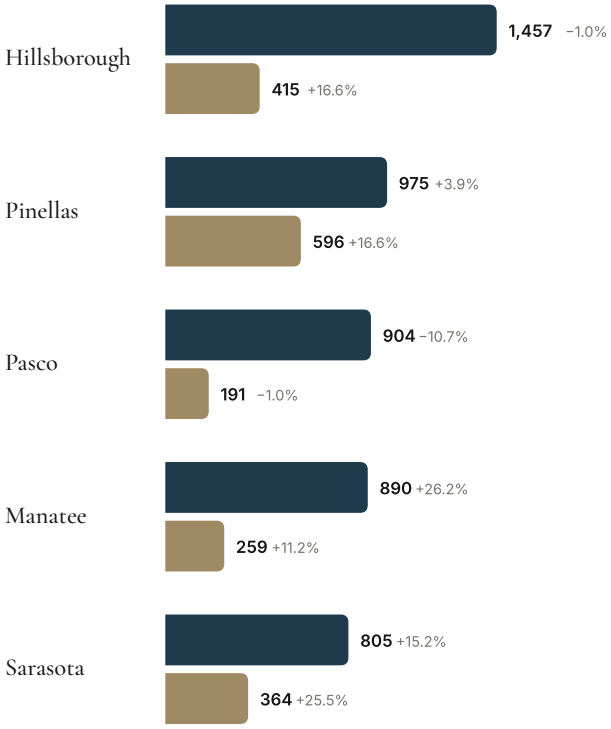
Median prices are the clearest single measure of value, but they also reflect the mix of homes that happened to sell in a given month. A month with more waterfront or new-construction closings will lift the median even if individual values are flat. That is why we pair price with supply.

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 4.1 months. Condominium supply ranged from 5.5 to 7.0 months.

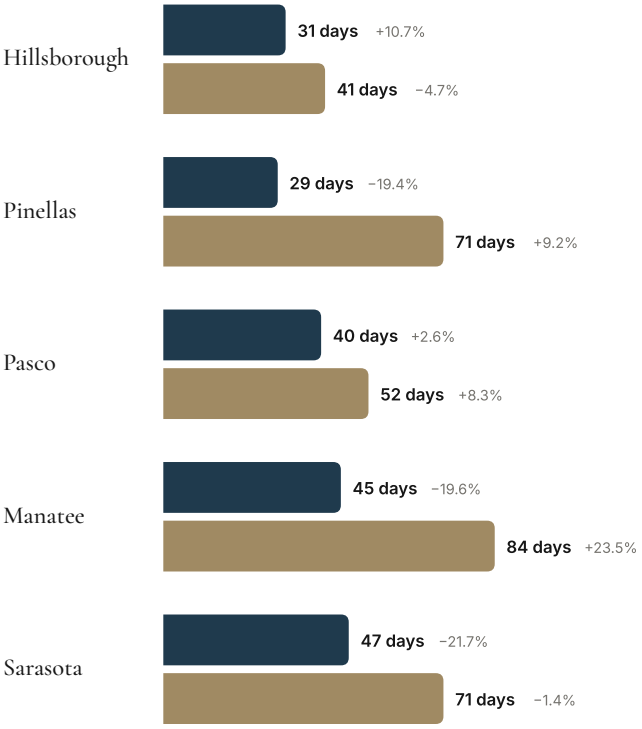
How many sold, *and how quickly.*

SINGLE-FAMILY CONDO / TOWNHOME

CLOSED SALES, JUNE 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 June, single-family homes went under contract fastest in Pinellas at 29 days and slowest in Sarasota at 47 days. Rising days to contract typically precede softer pricing, and falling days typically precede firmer pricing.

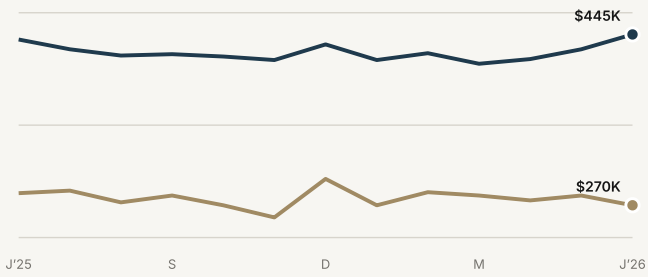
THIRTEEN-MONTH PRICE TRENDS

The line matters *more than the point.*

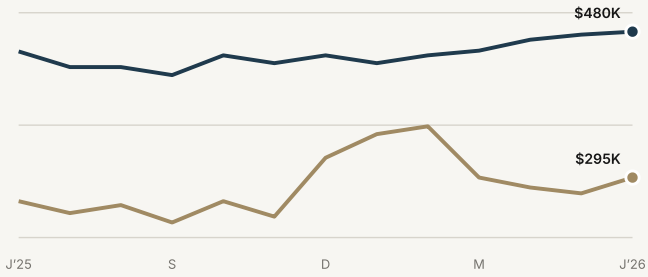
Median sale price for each county from June 2025 through June 2026. Reading a full year at once separates seasonal swings from genuine shifts in value.

SINGLE-FAMILY CONDO / TOWNHOME

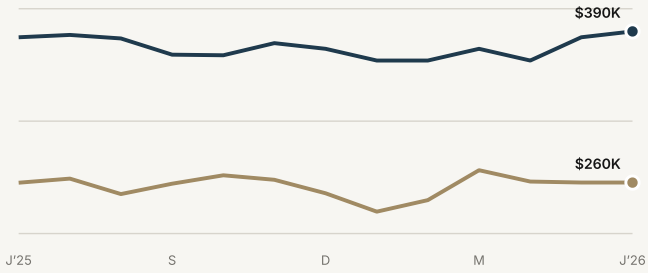
Hillsborough



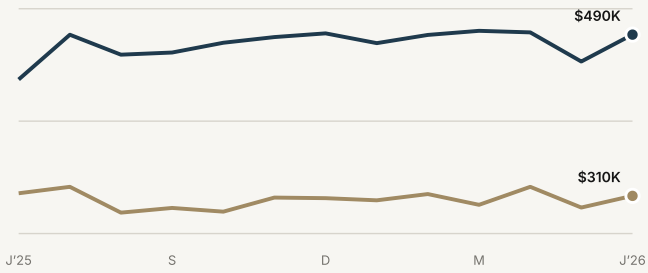
Pinellas



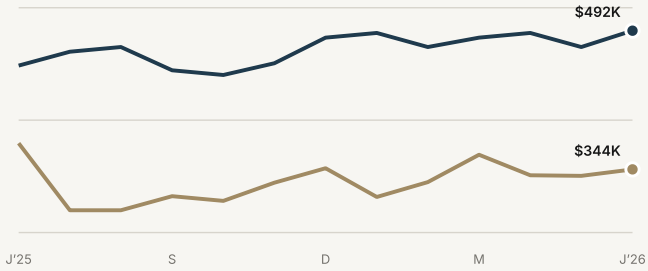
Pasco



Manatee



Sarasota



HOW TO READ THESE

Each line shows thirteen monthly medians. The labeled point is June 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 · JUNE 2026

Hillsborough *County*

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

SINGLE-FAMILY HOMES

Closed sales	1,457	−1.0%
Median sale price	$445,155	+1.2%
Average sale price	$610,895	+6.6%
Dollar volume	$890.1 M	+5.5%
Median days to contract	31	+10.7%
Median days to sale	70	0.0%
% of original list received	97.2%	0.0%
New listings	1,730	+2.6%
New pending sales	1,294	−2.0%
Active listings	4,418	−14.9%
Months supply	3.7	−11.9%
Cash share of sales	18%	

CONDOS AND TOWNHOMES

Closed sales	415	+16.6%
Median sale price	$270,000	−4.4%
Average sale price	$457,577	+33.2%
Dollar volume	$189.9 M	+55.2%
Median days to contract	41	−4.7%
Median days to sale	78	−7.1%
% of original list received	95.5%	+0.5%
New listings	573	+18.1%
New pending sales	375	+1.1%
Active listings	1,783	−11.2%
Months supply	5.5	−8.3%
Cash share of sales	42%	

What the numbers *are saying.*

Single-family. Single-family closings in Hillsborough County totaled 1,457 in June, down 1.0 percent from a year earlier. The median sale price settled at $445,155, up 1.2 percent from a year earlier, and sellers received a median 97.2% of original list price. Homes went under contract in a median 31 days. With 4,418 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 415 closings, up 16.6 percent from a year earlier, at a median of $270,000. Supply stood at 5.5 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

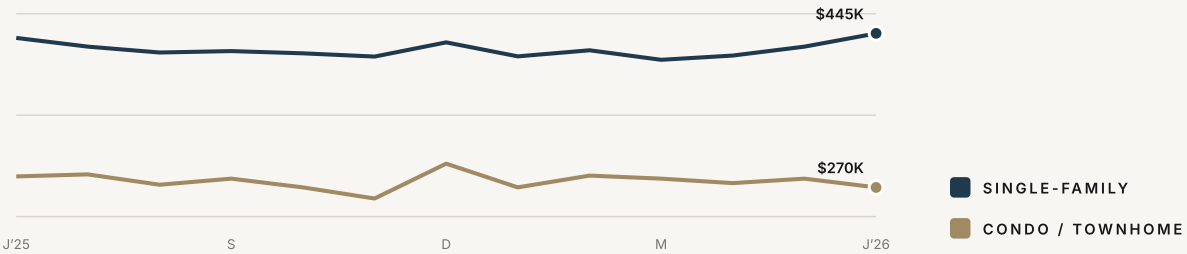
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	20	−33.3%	19	36	1.8
$200,000 to $299,999	128	−13.5%	30	296	2.3
$300,000 to $399,999	402	−4.5%	36	1,184	2.9
$400,000 to $499,999	315	+7.5%	36	966	3.1
$500,000 to $599,999	180	−6.7%	20	571	3.2
$600,000 to $699,999	88	−21.4%	44	306	3.5
$700,000 to $799,999	78	+13.0%	26	212	2.7
$800,000 to $899,999	59	+20.4%	19	158	2.7
$900,000 to $999,999	31	0.0%	23	91	2.9
$1,000,000 or more	156	+23.8%	26	598	3.8

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	103	+47.1%	58	459	4.5
$200,000 to $299,999	127	−11.8%	48	542	4.3
$300,000 to $399,999	67	+3.1%	50	282	4.2
$400,000 to $499,999	27	+28.6%	34	122	4.5
$500,000 to $599,999	23	0.0%	34	71	3.1
$600,000 to $699,999	12	+20.0%	35	65	5.4
$700,000 to $799,999	10	+25.0%	58	41	4.1
$800,000 to $899,999	7	+16.7%	60	29	4.1
$900,000 to $999,999	2	+100.0%	182	22	11.0
$1,000,000 or more	37	+362.5%	0	150	4.1

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 · JUNE 2026

Pinellas *County*

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

SINGLE-FAMILY HOMES

Closed sales	975	+3.9%
Median sale price	$480,000	+5.5%
Average sale price	$653,234	+9.3%
Dollar volume	$636.9 M	+13.6%
Median days to contract	29	−19.4%
Median days to sale	69	−2.8%
% of original list received	96.1%	+2.0%
New listings	1,090	−6.8%
New pending sales	944	−0.3%
Active listings	2,987	−26.6%
Months supply	3.5	−28.6%
Cash share of sales	29%	

CONDOS AND TOWNHOMES

Closed sales	596	+16.6%
Median sale price	$295,000	+11.3%
Average sale price	$414,527	+11.9%
Dollar volume	$247.1 M	+30.5%
Median days to contract	71	+9.2%
Median days to sale	105	+1.0%
% of original list received	91.9%	+0.3%
New listings	748	+3.3%
New pending sales	567	+21.2%
Active listings	3,806	−8.2%
Months supply	7.0	−18.6%
Cash share of sales	59%	

What the numbers *are saying.*

Single-family. Single-family closings in Pinellas County totaled 975 in June, up 3.9 percent from a year earlier. The median sale price settled at $480,000, up 5.5 percent from a year earlier, and sellers received a median 96.1% of original list price. Homes went under contract in a median 29 days. With 2,987 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 596 closings, up 16.6 percent from a year earlier, at a median of $295,000. Supply stood at 7.0 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

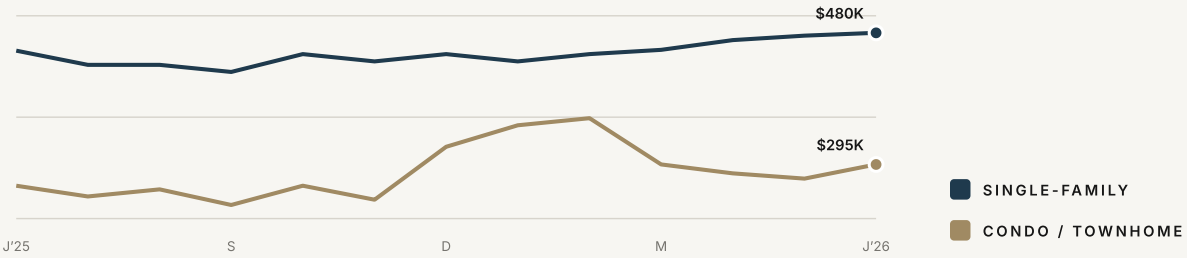
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	12	−70.0%	19	28	2.3
$200,000 to $299,999	100	−2.9%	28	201	2.0
$300,000 to $399,999	228	+12.3%	29	500	2.2
$400,000 to $499,999	179	−10.9%	26	512	2.9
$500,000 to $599,999	127	+13.4%	24	349	2.7
$600,000 to $699,999	83	+36.1%	22	256	3.1
$700,000 to $799,999	57	+5.6%	32	180	3.2
$800,000 to $899,999	38	+22.6%	29	132	3.5
$900,000 to $999,999	32	+28.0%	24	103	3.2
$1,000,000 or more	119	+10.2%	60	726	6.1

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	190	+10.5%	77	1,132	6.0
$200,000 to $299,999	112	−2.6%	48	818	7.3
$300,000 to $399,999	99	+35.6%	71	486	4.9
$400,000 to $499,999	54	0.0%	83	324	6.0
$500,000 to $599,999	37	+42.3%	63	192	5.2
$600,000 to $699,999	24	+60.0%	117	162	6.8
$700,000 to $799,999	18	+28.6%	125	135	7.5
$800,000 to $899,999	14	0.0%	39	87	6.2
$900,000 to $999,999	11	+175.0%	87	88	8.0
$1,000,000 or more	37	+54.2%	71	382	10.3

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 · JUNE 2026

Pasco *County*

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

SINGLE-FAMILY HOMES

Closed sales	904	−10.7%
Median sale price	$390,000	+1.3%
Average sale price	$436,895	+2.5%
Dollar volume	$395.0 M	−8.4%
Median days to contract	40	+2.6%
Median days to sale	81	0.0%
% of original list received	96.4%	+0.3%
New listings	1,141	−3.8%
New pending sales	820	−10.0%
Active listings	3,161	−4.9%
Months supply	4.1	+2.5%
Cash share of sales	21%	

CONDOS AND TOWNHOMES

Closed sales	191	−1.0%
Median sale price	$260,000	0.0%
Average sale price	$243,530	−6.1%
Dollar volume	$46.5 M	−7.0%
Median days to contract	52	+8.3%
Median days to sale	100	+14.9%
% of original list received	94.4%	−0.7%
New listings	264	+6.5%
New pending sales	159	−13.1%
Active listings	1,013	−1.3%
Months supply	6.3	+31.3%
Cash share of sales	39%	

What the numbers *are saying.*

Single-family. Single-family closings in Pasco County totaled 904 in June, down 10.7 percent from a year earlier. The median sale price settled at $390,000, up 1.3 percent from a year earlier, and sellers received a median 96.4% of original list price. Homes went under contract in a median 40 days. With 3,161 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 191 closings, down 1.0 percent from a year earlier, at a median of $260,000. Supply stood at 6.3 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

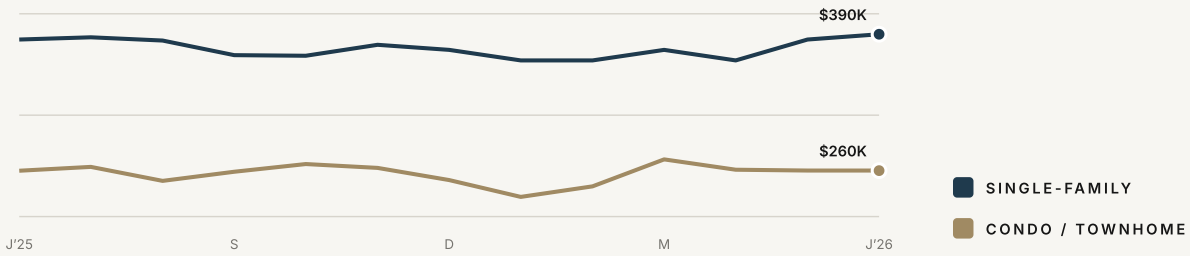
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	55	−29.5%	27	81	1.5
$200,000 to $299,999	190	−6.9%	42	633	3.3
$300,000 to $399,999	227	−15.6%	34	860	3.8
$400,000 to $499,999	178	−3.3%	42	584	3.3
$500,000 to $599,999	115	−6.5%	45	400	3.5
$600,000 to $699,999	49	−26.9%	44	177	3.6
$700,000 to $799,999	27	−25.0%	52	143	5.3
$800,000 to $899,999	23	+43.8%	24	88	3.8
$900,000 to $999,999	13	+8.3%	53	54	4.2
$1,000,000 or more	27	+17.4%	11	141	5.2

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	66	+50.0%	62	344	5.2
$200,000 to $299,999	60	−26.8%	52	372	6.2
$300,000 to $399,999	57	−5.0%	34	239	4.2
$400,000 to $499,999	7	0.0%	122	37	5.3
$500,000 to $599,999	0	N/A	·	5	·
$600,000 to $699,999	0	N/A	·	8	·
$700,000 to $799,999	0	N/A	·	5	·
$800,000 to $899,999	0	N/A	·	0	·
$900,000 to $999,999	1	N/A	0	0	0.0
$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 · JUNE 2026

Manatee *County*

BRADENTON, LAKEWOOD RANCH, PALMETTO AND ANNA MARIA ISLAND

SINGLE-FAMILY HOMES		
Closed sales	890	+26.2%
Median sale price	$490,000	+11.4%
Average sale price	$648,560	+11.2%
Dollar volume	$577.2 M	+40.3%
Median days to contract	45	−19.6%
Median days to sale	99	−9.2%
% of original list received	95.8%	+1.6%
New listings	831	+4.9%
New pending sales	716	+22.8%
Active listings	2,706	−15.3%
Months supply	4.1	−21.2%
Cash share of sales	25%	

CONDOS AND TOWNHOMES		
Closed sales	259	+11.2%
Median sale price	$310,000	−0.9%
Average sale price	$349,674	+4.7%
Dollar volume	$90.6 M	+16.4%
Median days to contract	84	+23.5%
Median days to sale	123	+10.8%
% of original list received	92.1%	+0.1%
New listings	271	+4.6%
New pending sales	242	+15.8%
Active listings	1,327	−18.2%
Months supply	5.7	−23.0%
Cash share of sales	50%	

What the numbers *are saying.*

Single-family. Single-family closings in Manatee County totaled 890 in June, up 26.2 percent from a year earlier. The median sale price settled at $490,000, up 11.4 percent from a year earlier, and sellers received a median 95.8% of original list price. Homes went under contract in a median 45 days. With 2,706 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 259 closings, up 11.2 percent from a year earlier, at a median of $310,000. Supply stood at 5.7 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

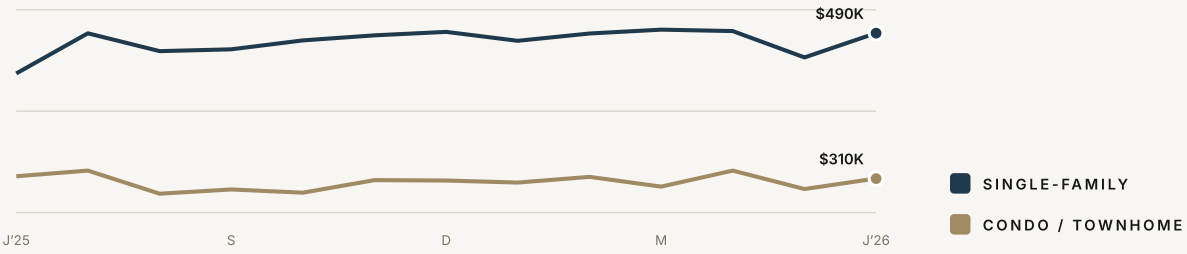
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	3	−84.2%	10	11	3.7
$200,000 to $299,999	48	+20.0%	30	68	1.4
$300,000 to $399,999	193	−4.9%	52	532	2.8
$400,000 to $499,999	215	+34.4%	45	546	2.5
$500,000 to $599,999	113	+50.7%	48	349	3.1
$600,000 to $699,999	83	+27.7%	34	234	2.8
$700,000 to $799,999	61	+60.5%	35	166	2.7
$800,000 to $899,999	54	+116.0%	55	132	2.4
$900,000 to $999,999	26	+44.4%	37	85	3.3
$1,000,000 or more	94	+51.6%	61	583	6.2

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	39	+2.6%	80	333	8.5
$200,000 to $299,999	87	+26.1%	88	329	3.8
$300,000 to $399,999	65	−21.7%	83	301	4.6
$400,000 to $499,999	35	+52.2%	59	127	3.6
$500,000 to $599,999	3	−66.7%	64	74	24.7
$600,000 to $699,999	14	+600.0%	52	51	3.6
$700,000 to $799,999	7	+250.0%	176	33	4.7
$800,000 to $899,999	4	+300.0%	263	18	4.5
$900,000 to $999,999	2	+100.0%	166	19	9.5
$1,000,000 or more	3	−40.0%	97	42	14.0

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 · JUNE 2026

Sarasota *County*

SARASOTA, VENICE, NORTH PORT AND LONGBOAT KEY

SINGLE-FAMILY HOMES		
Closed sales	805	+15.2%
Median sale price	$492,450	+8.2%
Average sale price	$732,527	+5.7%
Dollar volume	$589.7 M	+21.8%
Median days to contract	47	−21.7%
Median days to sale	89	−10.1%
% of original list received	94.4%	+2.4%
New listings	753	−6.5%
New pending sales	686	+4.1%
Active listings	2,870	−27.4%
Months supply	4.1	−34.9%
Cash share of sales	39%	

CONDOS AND TOWNHOMES		
Closed sales	364	+25.5%
Median sale price	$343,750	−7.5%
Average sale price	$571,877	−1.0%
Dollar volume	$208.2 M	+24.3%
Median days to contract	71	−1.4%
Median days to sale	109	−4.4%
% of original list received	92.0%	+2.6%
New listings	359	+14.0%
New pending sales	307	+27.4%
Active listings	1,959	−12.1%
Months supply	6.3	−24.1%
Cash share of sales	59%	

What the numbers *are saying*.

Single-family. Single-family closings in Sarasota County totaled 805 in June, up 15.2 percent from a year earlier. The median sale price settled at $492,450, up 8.2 percent from a year earlier, and sellers received a median 94.4% of original list price. Homes went under contract in a median 47 days. With 2,870 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 364 closings, up 25.5 percent from a year earlier, at a median of $343,750. Supply stood at 6.3 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

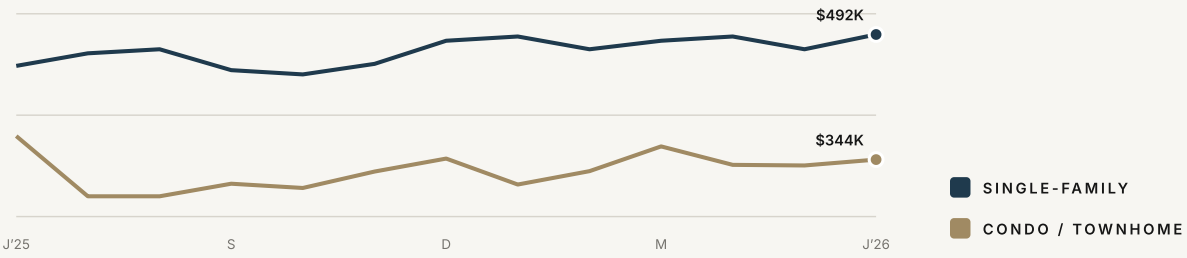
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	16	+60.0%	33	34	2.1
$200,000 to $299,999	99	+19.3%	39	229	2.3
$300,000 to $399,999	170	−4.0%	42	574	3.4
$400,000 to $499,999	124	+4.2%	39	438	3.5
$500,000 to $599,999	117	+91.8%	60	294	2.5
$600,000 to $699,999	77	+16.7%	62	220	2.9
$700,000 to $799,999	32	−23.8%	65	165	5.2
$800,000 to $899,999	30	+7.1%	28	127	4.2
$900,000 to $999,999	14	−12.5%	20	94	6.7
$1,000,000 or more	126	+29.9%	55	695	5.5

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	42	+20.0%	60	233	5.5
$200,000 to $299,999	83	+27.7%	66	471	5.7
$300,000 to $399,999	94	+42.4%	72	374	4.0
$400,000 to $499,999	44	−12.0%	94	197	4.5
$500,000 to $599,999	21	+40.0%	32	112	5.3
$600,000 to $699,999	12	−7.7%	80	101	8.4
$700,000 to $799,999	11	+57.1%	71	54	4.9
$800,000 to $899,999	3	−40.0%	69	46	15.3
$900,000 to $999,999	9	+125.0%	88	55	6.1
$1,000,000 or more	45	+50.0%	76	316	7.0

Sarasota median sale price, thirteen months



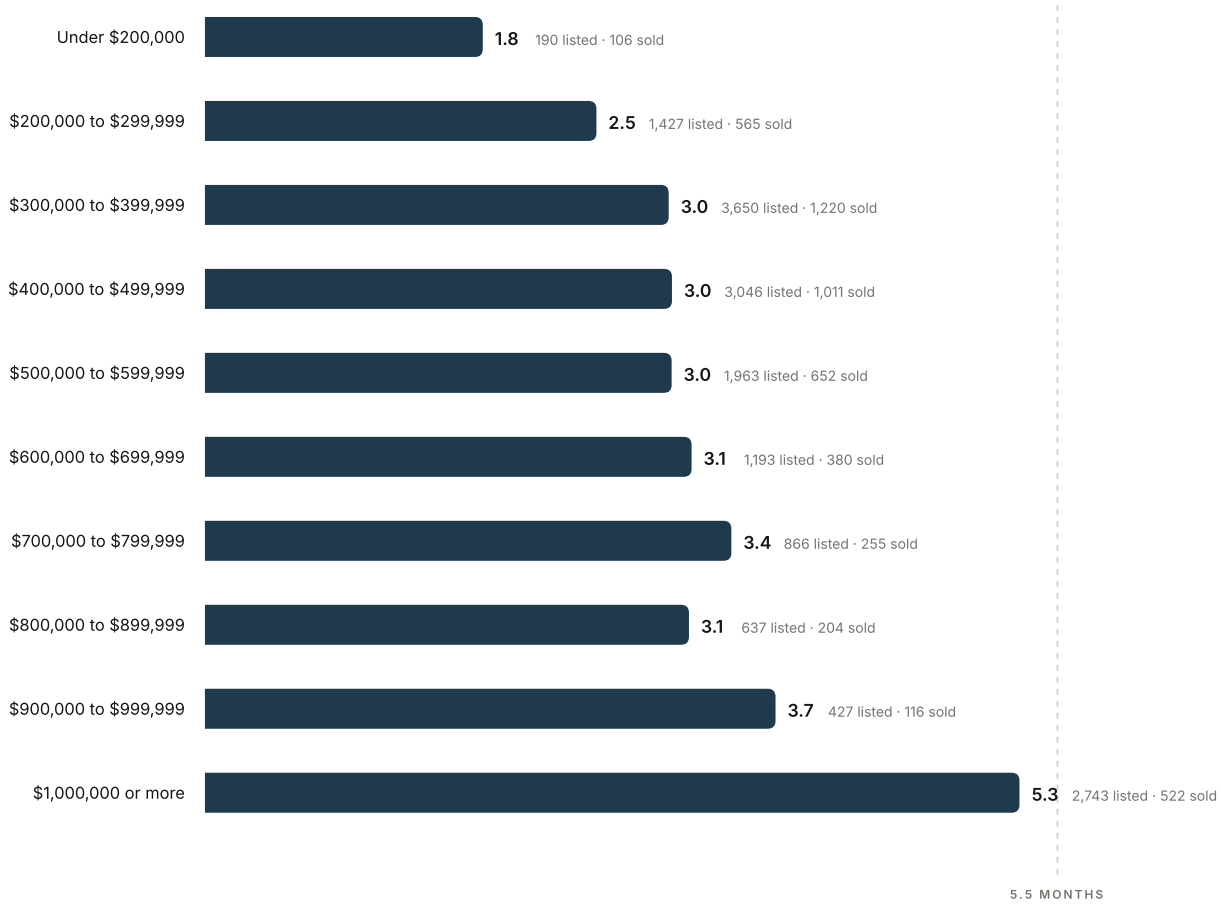
Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot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

PRICE TIERS · FIVE-COUNTY SINGLE-FAMILY

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 June. The result shows where inventory is scarce and where buyers have more choice.

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



UNDER $500,000

Listings in these ranges equaled 2.9 months of June's sales. Entry and mid-priced homes continue to carry the most transactions in the region.

$700,000 AND ABOVE

Listings equaled 4.3 months of June'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, 522 single-family homes sold for $1 million or more in June, against 2,743 active listings at that level at month end.

BY PRICE RANGE, FIVE COUNTIES

RANGE	SOLD	NEW LISTINGS	ACTIVE
$1M to $1.25M	165	165	544
$1.25M to $1.5M	93	127	508
$1.5M to $2M	111	116	536
$2M to $3M	103	96	467
$3M to $5M	40	50	409
$5M to $10M	8	19	207
$10M and above	2	6	72

$1M AND ABOVE, BY COUNTY

COUNTY	SOLD	YOY	ACTIVE	YOY
Hillsborough	156	+23.8%	598	−18.2%
Pinellas	119	+10.2%	726	−10.8%
Pasco	27	+17.4%	141	−4.1%
Manatee	94	+51.6%	583	−8.9%
Sarasota	126	+29.9%	695	−18.0%

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%	23	0.75	42%	2	0.65
Pinellas	29%	13	0.87	59%	5	0.76
Pasco	21%	7	0.72	39%	0	0.60
Manatee	25%	6	0.86	50%	4	0.89
Sarasota	39%	3	0.91	59%	2	0.86

CASH SHARE
The share of closings paid entirely in cash. Higher readings often point to investors, second-home buyers and downsizers with equity. Regionally, 25 percent of single-family and 52 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 June 2026 data was released on Friday, July 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 June 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 June 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

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TAMPA BAY MARKET INTELLIGENCE

June 2026

MIDDLETON
TAMPA BAY

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COMPASS

Source: Florida Realtors® Monthly Market Detail, June 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.