

TAMPA BAY MARKET INTELLIGENCE · MONTHLY REPORT

September 2026

MIDDLETON
TAMPA BAY

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

DATA RELEASED FRIDAY, OCTOBER 16, 2026

The month *in numbers.*

3,928
SINGLE-FAMILY SALES
down 5.3% year over year

$2.50B
SINGLE-FAMILY VOLUME
up 11.4% year over year

16,334
ACTIVE SF LISTINGS
down 6.9% year over year

1,467
CONDO AND TOWNHOME SALES
up 8.0% year over year

KEY TAKEAWAYS

- Single-family closings across the five counties totaled 3,928, down 5.3 percent from a year earlier, with $2.50 billion in dollar volume.
- Pinellas posted the strongest single-family median price change at +9.4%, while Hillsborough posted the weakest at minus 1.3%.
- Single-family supply ranged from 3.7 months in Pinellas to 4.3 months in Pasco.
- Condominium and townhome closings totaled 1,467, up 8.0 percent from a year earlier, and condo supply ranged from 4.9 to 6.5 months.
- Active single-family inventory stood at 16,334 listings, down 6.9 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	3,928 −5.3%	$2.50 B +11.4%	$636,380 +17.6%	5,048 +1.9%	3,676 −7.8%	16,334 −6.9%	29%
Condo and Townhome	1,467 +8.0%	$742.3 M +60.0%	$505,999 +48.1%	2,108 +7.0%	1,332 +1.5%	9,309 −4.4%	54%

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 September *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 September, regional single-family sales were down 5.3 percent from a year earlier and the regional average price was up 17.6 percent from a year earlier. Active inventory was down 6.9 percent on the year.

WHAT STOOD OUT

Pinellas led the region in single-family price growth at +9.4% year over year. Pinellas had the tightest supply at 3.7 months. Homes moved fastest in Pinellas, at a median 36 days to contract, and slowest in Manatee, at 53 days.

Negotiating room varied as well. Sellers received a median 96.4% of original list price in Pasco and 94.3% in Sarasota.

WHAT IT MEANS

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

For buyers, condominium supply above six months in Hillsborough, 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 September 2026 value with its change from September 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	1,114 −7.4%	$419,450 −1.3%	$577,128 +10.1%	40 0.0%	96.2% +0.6%	4,708 −3.6%	4.0 0.0%	24%
Pinellas	746 −9.0%	$465,000 +9.4%	$634,138 +12.1%	36 −14.3%	94.7% +1.7%	3,129 −14.2%	3.7 −11.9%	31%
Pasco	751 −7.9%	$370,000 0.0%	$416,096 −0.1%	48 +2.1%	96.4% +0.9%	3,258 +1.1%	4.3 +13.2%	21%
Manatee	636 −3.9%	$485,000 +3.2%	$629,444 +6.1%	53 −11.7%	95.7% +2.6%	2,610 −1.7%	3.9 −7.1%	28%
Sarasota	681 +5.4%	$485,000 +7.8%	$985,116 +52.5%	51 −20.3%	94.3% +2.3%	2,629 −16.2%	3.7 −22.9%	42%
Region	3,928 −5.3%	By county	$636,380 +17.6%	By county	By county	16,334 −6.9%	By county	29%

5,048
NEW LISTINGS
up 1.9% year over year, five counties

3,676
NEW PENDING SALES
down 7.8% year over year, five counties

38,449
CLOSED SALES YEAR TO DATE
January through September, five counties

YEAR TO DATE, JANUARY THROUGH SEPTEMBER

10,939
HILLSBOROUGH
down 3.6% in closed sales

7,707
PINELLAS
down 4.5% in closed sales

7,019
PASCO
down 10.5% in closed sales

6,201
MANATEE
up 7.6% in closed sales

6,583
SARASOTA
up 5.5% 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 September 2026 value with its change from September 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	281 −12.5%	$255,650 −8.7%	$383,215 +5.9%	56 +1.8%	94.3% −0.3%	1,942 +3.5%	6.2 +10.7%	43%
Pinellas	495 +13.3%	$246,750 +3.7%	$378,394 +13.7%	61 −20.8%	92.4% +1.5%	3,596 −3.2%	6.5 −17.7%	61%
Pasco	158 +2.6%	$262,062 +1.2%	$245,540 −4.5%	64 +6.7%	93.6% +0.4%	979 +4.3%	6.2 +31.9%	41%
Manatee	224 +3.7%	$296,500 0.0%	$330,665 +7.8%	76 −17.4%	91.5% +1.9%	1,191 −13.9%	5.0 −20.6%	48%
Sarasota	309 +34.3%	$335,000 +6.3%	$1,082,129 +157.9%	77 −28.7%	93.0% +5.3%	1,601 −12.0%	4.9 −27.9%	63%
Region	1,467 +8.0%	By county	$505,999 +48.1%	By county	By county	9,309 −4.4%	By county	54%

2,108

NEW LISTINGS

up 7.0% year over year, five counties

1,332

NEW PENDING SALES

up 1.5% year over year, five counties

14,907

CLOSED SALES YEAR TO DATE

January through September, five counties

YEAR TO DATE, JANUARY THROUGH SEPTEMBER

2,880
HILLSBOROUGH
down 6.6% in closed sales

5,209
PINELLAS
up 19.0% in closed sales

1,423
PASCO
down 20.2% in closed sales

2,266
MANATEE
up 7.3% in closed sales

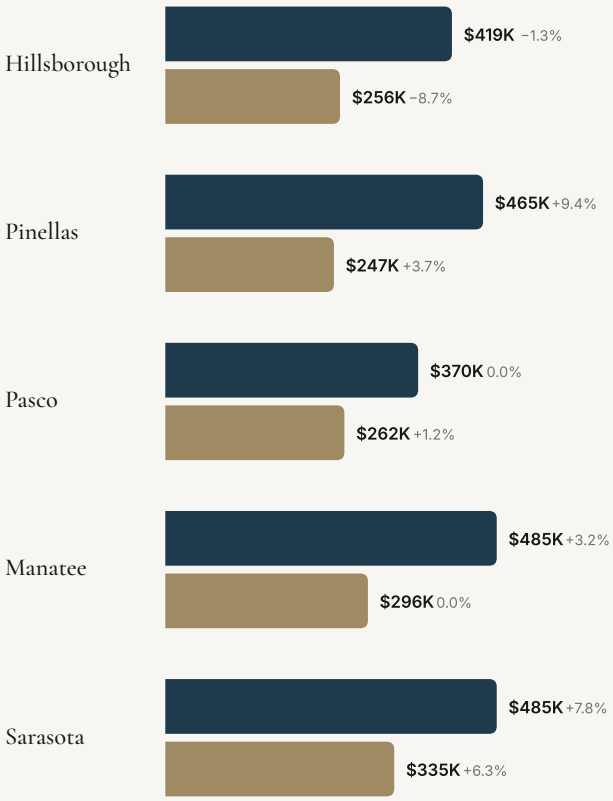
3,129
SARASOTA
up 23.9% in closed sales

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.

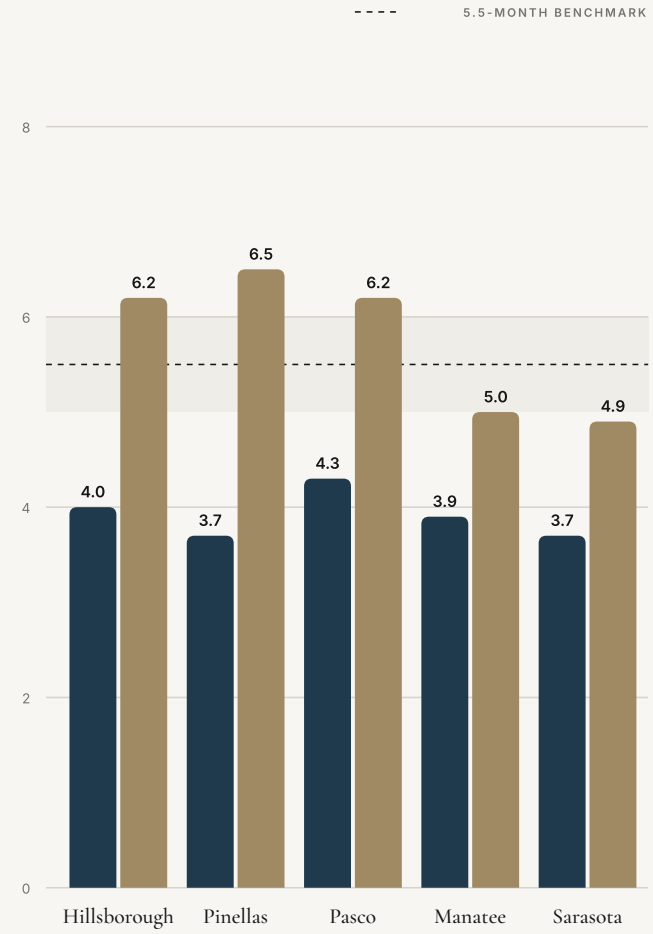
Where values sit, *and how much is for sale.*

SINGLE-FAMILY CONDO / TOWNHOME

MEDIAN SALE PRICE, SEPTEMBER 2026, CHANGE YEAR OVER YEAR



MONTHS SUPPLY OF INVENTORY, SEPTEMBER 2026



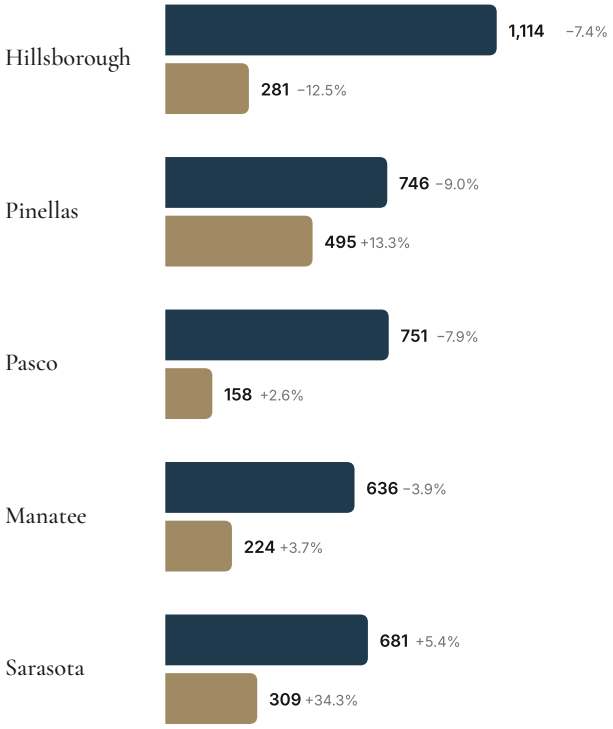
Median prices are the clearest single measure of value, but they also reflect the mix of homes that happened to sell in a given month. A month with more waterfront or new-construction closings will lift the median even if individual values are flat. That is why we pair price with supply.

Months supply measures how long current inventory would last at the average pace of sales over the past twelve months. Florida Realtors® economists treat 5.5 months as the benchmark for a balanced market. Single-family supply this month ranged from 3.7 to 4.3 months. Condominium supply ranged from 4.9 to 6.5 months.

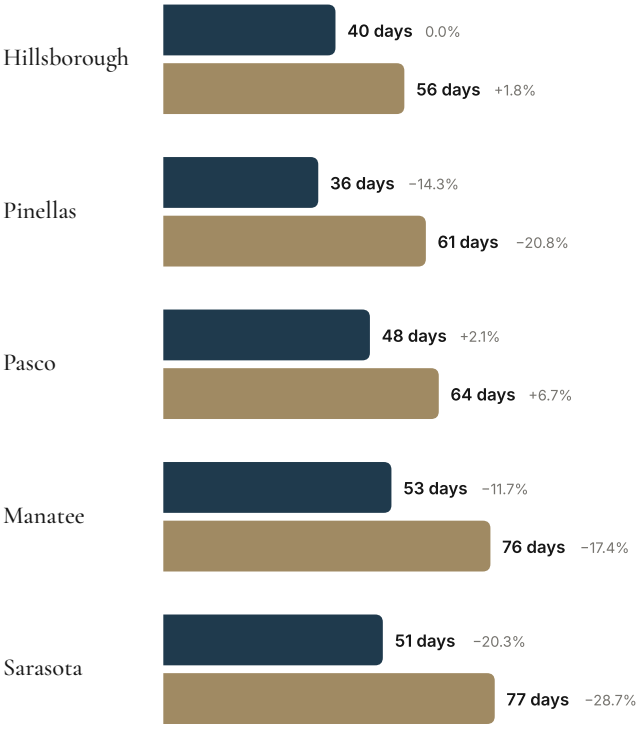
How many sold, *and how quickly.*

SINGLE-FAMILY CONDO / TOWNHOME

CLOSED SALES, SEPTEMBER 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 September, single-family homes went under contract fastest in Pinellas at 36 days and slowest in Manatee at 53 days. Rising days to contract typically precede softer pricing, and falling days typically precede firmer pricing.

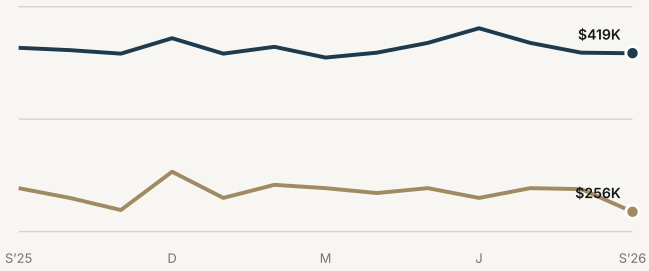
THIRTEEN-MONTH PRICE TRENDS

The line matters *more than the point.*

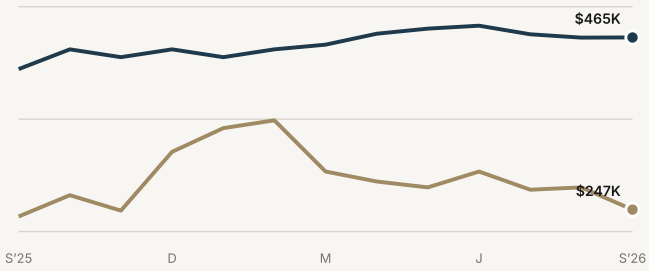
Median sale price for each county from September 2025 through September 2026. Reading a full year at once separates seasonal swings from genuine shifts in value.

SINGLE-FAMILY CONDO / TOWNHOME

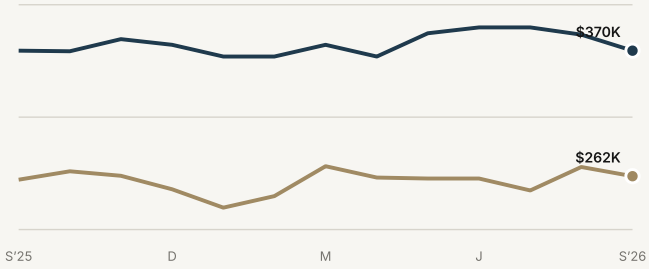
Hillsborough



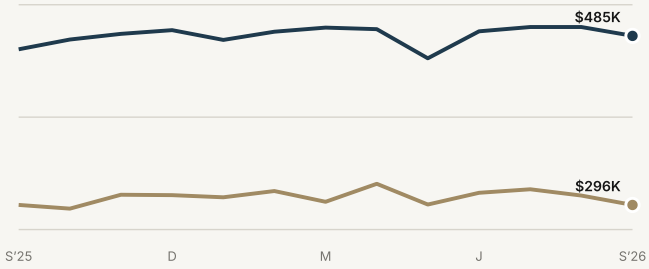
Pinellas



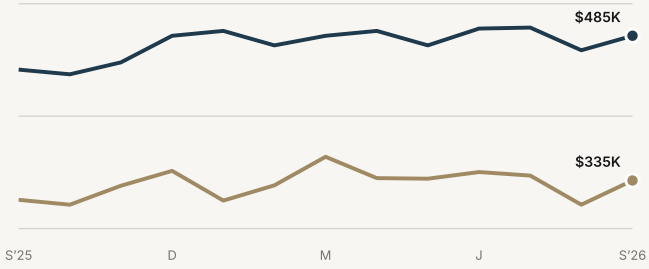
Pasco



Manatee



Sarasota



HOW TO READ THESE

Each line shows thirteen monthly medians. The labeled point is September 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 · SEPTEMBER 2026

Hillsborough *County*

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

SINGLE-FAMILY HOMES

Closed sales	1,114	−7.4%
Median sale price	$419,450	−1.3%
Average sale price	$577,128	+10.1%
Dollar volume	$642.9 M	+1.9%
Median days to contract	40	0.0%
Median days to sale	77	−6.1%
% of original list received	96.2%	+0.6%
New listings	1,490	−4.3%
New pending sales	1,027	−15.8%
Active listings	4,708	−3.6%
Months supply	4.0	0.0%
Cash share of sales	24%	

CONDOS AND TOWNHOMES

Closed sales	281	−12.5%
Median sale price	$255,650	−8.7%
Average sale price	$383,215	+5.9%
Dollar volume	$107.7 M	−7.3%
Median days to contract	56	+1.8%
Median days to sale	92	−2.1%
% of original list received	94.3%	−0.3%
New listings	484	+6.4%
New pending sales	276	−5.5%
Active listings	1,942	+3.5%
Months supply	6.2	+10.7%
Cash share of sales	43%	

What the numbers *are saying.*

Single-family. Single-family closings in Hillsborough County totaled 1,114 in September, down 7.4 percent from a year earlier. The median sale price settled at $419,450, down 1.3 percent from a year earlier, and sellers received a median 96.2% of original list price. Homes went under contract in a median 40 days. With 4,708 active listings, the county held 4.0 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 281 closings, down 12.5 percent from a year earlier, at a median of $255,650. Supply stood at 6.2 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

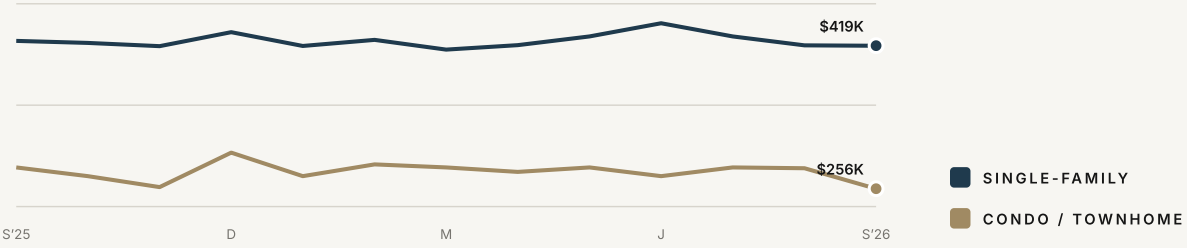
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	27	+8.0%	17	45	1.7
$200,000 to $299,999	135	+6.3%	29	469	3.5
$300,000 to $399,999	334	−6.4%	40	1,347	4.0
$400,000 to $499,999	233	−14.0%	45	969	4.2
$500,000 to $599,999	119	−20.7%	45	582	4.9
$600,000 to $699,999	72	+1.4%	33	280	3.9
$700,000 to $799,999	43	−23.2%	38	195	4.5
$800,000 to $899,999	36	−21.7%	44	146	4.1
$900,000 to $999,999	15	−37.5%	47	83	5.5
$1,000,000 or more	100	+31.6%	60	592	5.9

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	79	+29.5%	61	521	6.6
$200,000 to $299,999	93	−18.4%	47	594	6.4
$300,000 to $399,999	37	−53.2%	63	310	8.4
$400,000 to $499,999	17	−37.0%	38	137	8.1
$500,000 to $599,999	10	−23.1%	34	72	7.2
$600,000 to $699,999	22	+450.0%	16	52	2.4
$700,000 to $799,999	7	+75.0%	96	46	6.6
$800,000 to $899,999	0	−100.0%	·	26	·
$900,000 to $999,999	1	−80.0%	67	19	19.0
$1,000,000 or more	15	+36.4%	74	165	11.0

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 · SEPTEMBER 2026

Pinellas *County*

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

SINGLE-FAMILY HOMES

Closed sales	746	−9.0%
Median sale price	$465,000	+9.4%
Average sale price	$634,138	+12.1%
Dollar volume	$473.1 M	+2.0%
Median days to contract	36	−14.3%
Median days to sale	76	−1.3%
% of original list received	94.7%	+1.7%
New listings	1,079	+5.9%
New pending sales	759	−9.2%
Active listings	3,129	−14.2%
Months supply	3.7	−11.9%
Cash share of sales	31%	

CONDOS AND TOWNHOMES

Closed sales	495	+13.3%
Median sale price	$246,750	+3.7%
Average sale price	$378,394	+13.7%
Dollar volume	$187.3 M	+28.8%
Median days to contract	61	−20.8%
Median days to sale	98	−16.2%
% of original list received	92.4%	+1.5%
New listings	783	+8.1%
New pending sales	442	−3.9%
Active listings	3,596	−3.2%
Months supply	6.5	−17.7%
Cash share of sales	61%	

What the numbers *are saying.*

Single-family. Single-family closings in Pinellas County totaled 746 in September, down 9.0 percent from a year earlier. The median sale price settled at $465,000, up 9.4 percent from a year earlier, and sellers received a median 94.7% of original list price. Homes went under contract in a median 36 days. With 3,129 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 495 closings, up 13.3 percent from a year earlier, at a median of $246,750. Supply stood at 6.5 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

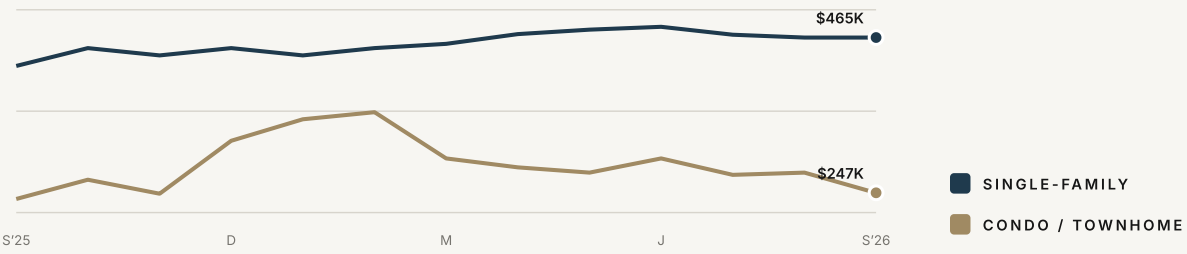
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	14	−50.0%	15	30	2.1
$200,000 to $299,999	78	−38.6%	32	250	3.2
$300,000 to $399,999	178	−11.4%	31	590	3.3
$400,000 to $499,999	146	−1.4%	30	571	3.9
$500,000 to $599,999	90	−8.2%	29	383	4.3
$600,000 to $699,999	65	+25.0%	49	228	3.5
$700,000 to $799,999	35	−31.4%	61	168	4.8
$800,000 to $899,999	24	−17.2%	27	117	4.9
$900,000 to $999,999	14	+16.7%	60	100	7.1
$1,000,000 or more	102	+37.8%	70	692	6.8

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	187	+8.7%	64	1,182	6.3
$200,000 to $299,999	100	+3.1%	59	761	7.6
$300,000 to $399,999	82	+34.4%	63	408	5.0
$400,000 to $499,999	29	−12.1%	53	280	9.7
$500,000 to $599,999	24	−4.0%	38	181	7.5
$600,000 to $699,999	13	−18.8%	76	148	11.4
$700,000 to $799,999	13	+8.3%	74	129	9.9
$800,000 to $899,999	7	+40.0%	9	82	11.7
$900,000 to $999,999	5	0.0%	140	70	14.0
$1,000,000 or more	35	+218.2%	67	355	10.1

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 · SEPTEMBER 2026

Pasco *County*

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

SINGLE-FAMILY HOMES

Closed sales	751	−7.9%
Median sale price	$370,000	0.0%
Average sale price	$416,096	−0.1%
Dollar volume	$312.5 M	−7.9%
Median days to contract	48	+2.1%
Median days to sale	87	−5.4%
% of original list received	96.4%	+0.9%
New listings	935	−1.0%
New pending sales	712	−0.7%
Active listings	3,258	+1.1%
Months supply	4.3	+13.2%
Cash share of sales	21%	

CONDOS AND TOWNHOMES

Closed sales	158	+2.6%
Median sale price	$262,062	+1.2%
Average sale price	$245,540	−4.5%
Dollar volume	$38.8 M	−2.0%
Median days to contract	64	+6.7%
Median days to sale	100	−5.7%
% of original list received	93.6%	+0.4%
New listings	193	+2.1%
New pending sales	150	+0.7%
Active listings	979	+4.3%
Months supply	6.2	+31.9%
Cash share of sales	41%	

What the numbers *are saying.*

Single-family. Single-family closings in Pasco County totaled 751 in September, down 7.9 percent from a year earlier. The median sale price settled at $370,000, unchanged from a year earlier, and sellers received a median 96.4% of original list price. Homes went under contract in a median 48 days. With 3,258 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 158 closings, up 2.6 percent from a year earlier, at a median of $262,062. Supply stood at 6.2 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

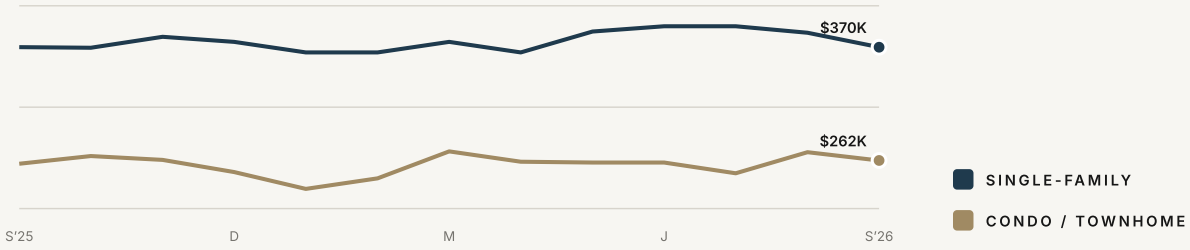
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	50	−2.0%	36	121	2.4
$200,000 to $299,999	164	−16.3%	37	732	4.5
$300,000 to $399,999	223	−7.9%	53	896	4.0
$400,000 to $499,999	130	+4.8%	41	594	4.6
$500,000 to $599,999	83	+20.3%	59	331	4.0
$600,000 to $699,999	32	−45.8%	68	188	5.9
$700,000 to $799,999	39	+21.9%	54	118	3.0
$800,000 to $899,999	9	−50.0%	57	78	8.7
$900,000 to $999,999	10	0.0%	8	58	5.8
$1,000,000 or more	11	−21.4%	73	142	12.9

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	44	+15.8%	59	372	8.5
$200,000 to $299,999	70	+12.9%	65	354	5.1
$300,000 to $399,999	40	−13.0%	61	195	4.9
$400,000 to $499,999	2	−75.0%	86	37	18.5
$500,000 to $599,999	1	N/A	104	6	6.0
$600,000 to $699,999	1	N/A	11	7	7.0
$700,000 to $799,999	0	N/A	·	5	·
$800,000 to $899,999	0	N/A	·	0	·
$900,000 to $999,999	0	N/A	·	0	·
$1,000,000 or more	0	N/A	·	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 · SEPTEMBER 2026

Manatee *County*

BRADENTON, LAKEWOOD RANCH, PALMETTO AND ANNA MARIA ISLAND

SINGLE-FAMILY HOMES

Closed sales	636	−3.9%
Median sale price	$485,000	+3.2%
Average sale price	$629,444	+6.1%
Dollar volume	$400.3 M	+2.0%
Median days to contract	53	−11.7%
Median days to sale	103	−5.5%
% of original list received	95.7%	+2.6%
New listings	741	+8.8%
New pending sales	559	−3.6%
Active listings	2,610	−1.7%
Months supply	3.9	−7.1%
Cash share of sales	28%	

CONDOS AND TOWNHOMES

Closed sales	224	+3.7%
Median sale price	$296,500	0.0%
Average sale price	$330,665	+7.8%
Dollar volume	$74.1 M	+11.7%
Median days to contract	76	−17.4%
Median days to sale	125	−3.8%
% of original list received	91.5%	+1.9%
New listings	285	+8.0%
New pending sales	173	+3.6%
Active listings	1,191	−13.9%
Months supply	5.0	−20.6%
Cash share of sales	48%	

What the numbers *are saying.*

Single-family. Single-family closings in Manatee County totaled 636 in September, down 3.9 percent from a year earlier. The median sale price settled at $485,000, up 3.2 percent from a year earlier, and sellers received a median 95.7% of original list price. Homes went under contract in a median 53 days. With 2,610 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 224 closings, up 3.7 percent from a year earlier, at a median of $296,500. Supply stood at 5.0 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

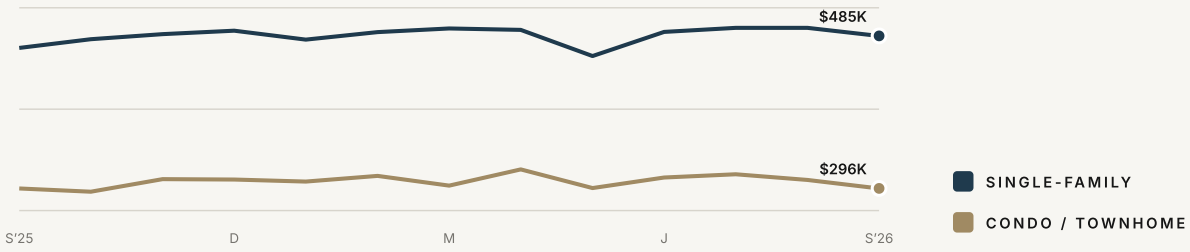
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	8	+33.3%	10	11	1.4
$200,000 to $299,999	33	−2.9%	36	77	2.3
$300,000 to $399,999	166	−7.8%	60	564	3.4
$400,000 to $499,999	134	−6.9%	53	551	4.1
$500,000 to $599,999	99	+17.9%	48	317	3.2
$600,000 to $699,999	49	−19.7%	43	222	4.5
$700,000 to $799,999	40	−18.4%	44	178	4.5
$800,000 to $899,999	27	−6.9%	33	125	4.6
$900,000 to $999,999	18	+63.6%	116	89	4.9
$1,000,000 or more	62	−3.1%	70	476	7.7

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	49	−2.0%	85	317	6.5
$200,000 to $299,999	66	+4.8%	88	300	4.5
$300,000 to $399,999	60	−3.2%	70	268	4.5
$400,000 to $499,999	26	−10.3%	76	134	5.2
$500,000 to $599,999	7	+40.0%	39	58	8.3
$600,000 to $699,999	3	+200.0%	122	40	13.3
$700,000 to $799,999	3	N/A	211	24	8.0
$800,000 to $899,999	4	+100.0%	58	9	2.2
$900,000 to $999,999	1	−50.0%	119	12	12.0
$1,000,000 or more	5	+150.0%	60	29	5.8

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 · SEPTEMBER 2026

Sarasota *County*

SARASOTA, VENICE, NORTH PORT AND LONGBOAT KEY

SINGLE-FAMILY HOMES		
Closed sales	681	+5.4%
Median sale price	$485,000	+7.8%
Average sale price	$985,116	+52.5%
Dollar volume	$670.9 M	+60.8%
Median days to contract	51	−20.3%
Median days to sale	91	−13.3%
% of original list received	94.3%	+2.3%
New listings	803	+6.5%
New pending sales	619	−2.8%
Active listings	2,629	−16.2%
Months supply	3.7	−22.9%
Cash share of sales	42%	

CONDOS AND TOWNHOMES		
Closed sales	309	+34.3%
Median sale price	$335,000	+6.3%
Average sale price	$1,082,129	+157.9%
Dollar volume	$334.4 M	+246.5%
Median days to contract	77	−28.7%
Median days to sale	131	−5.8%
% of original list received	93.0%	+5.3%
New listings	363	+7.4%
New pending sales	291	+19.3%
Active listings	1,601	−12.0%
Months supply	4.9	−27.9%
Cash share of sales	63%	

What the numbers *are saying.*

Single-family. Single-family closings in Sarasota County totaled 681 in September, up 5.4 percent from a year earlier. The median sale price settled at $485,000, up 7.8 percent from a year earlier, and sellers received a median 94.3% of original list price. Homes went under contract in a median 51 days. With 2,629 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 309 closings, up 34.3 percent from a year earlier, at a median of $335,000. Supply stood at 4.9 months, seller-leaning by the same measure.

ACTIVITY BY PRICE RANGE

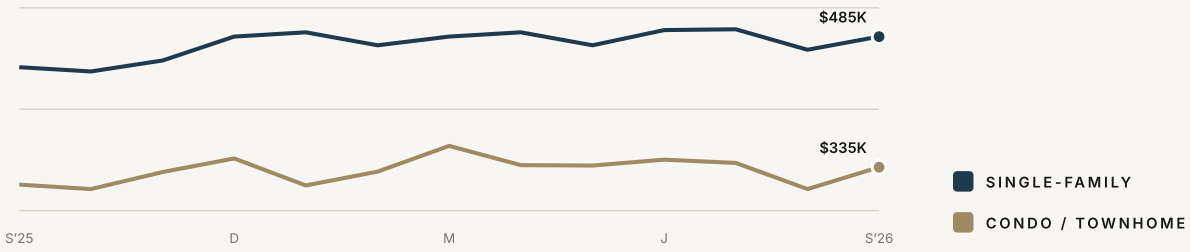
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	16	−15.8%	8	34	2.1
$200,000 to $299,999	68	−15.0%	59	232	3.4
$300,000 to $399,999	159	−0.6%	43	569	3.6
$400,000 to $499,999	109	+2.8%	52	429	3.9
$500,000 to $599,999	75	+4.2%	40	271	3.6
$600,000 to $699,999	67	+26.4%	61	189	2.8
$700,000 to $799,999	40	+37.9%	87	151	3.8
$800,000 to $899,999	22	−24.1%	45	91	4.1
$900,000 to $999,999	22	+100.0%	63	80	3.6
$1,000,000 or more	103	+18.4%	65	583	5.7

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	42	−6.7%	94	218	5.2
$200,000 to $299,999	72	+24.1%	76	418	5.8
$300,000 to $399,999	72	+22.0%	76	273	3.8
$400,000 to $499,999	35	+20.7%	86	150	4.3
$500,000 to $599,999	17	+88.9%	61	93	5.5
$600,000 to $699,999	11	+22.2%	84	75	6.8
$700,000 to $799,999	7	+600.0%	74	49	7.0
$800,000 to $899,999	8	+100.0%	68	27	3.4
$900,000 to $999,999	3	0.0%	123	32	10.7
$1,000,000 or more	42	+223.1%	66	266	6.3

Sarasota median sale price, thirteen months

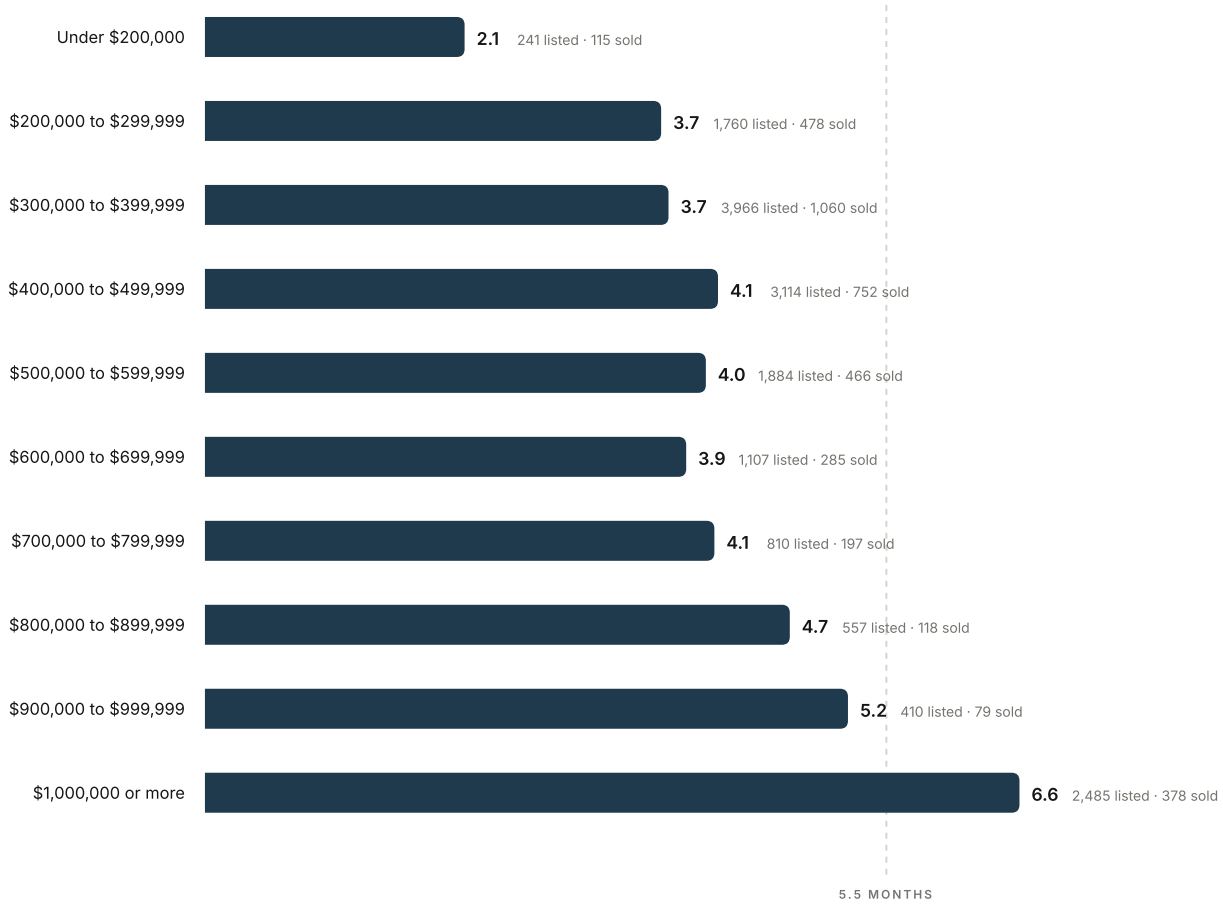


Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot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

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



UNDER $500,000

Listings in these ranges equaled 3.8 months of September's sales. Entry and mid-priced homes continue to carry the most transactions in the region.

$700,000 AND ABOVE

Listings equaled 5.5 months of September'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, 378 single-family homes sold for $1 million or more in September, against 2,485 active listings at that level at month end.

BY PRICE RANGE, FIVE COUNTIES

RANGE	SOLD	NEW LISTINGS	ACTIVE
$1M to $1.25M	90	156	549
$1.25M to $1.5M	99	137	496
$1.5M to $2M	79	121	461
$2M to $3M	60	103	429
$3M to $5M	36	56	343
$5M to $10M	8	28	161
$10M and above	6	3	46

$1M AND ABOVE, BY COUNTY

COUNTY	SOLD	YOY	ACTIVE	YOY
Hillsborough	100	+31.6%	592	−4.2%
Pinellas	102	+37.8%	692	−7.1%
Pasco	11	−21.4%	142	0.0%
Manatee	62	−3.1%	476	−4.0%
Sarasota	103	+18.4%	583	−9.0%

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	24%	23	0.69	43%	3	0.57
Pinellas	31%	11	0.70	61%	6	0.56
Pasco	21%	10	0.76	41%	2	0.78
Manatee	28%	11	0.75	48%	0	0.61
Sarasota	42%	13	0.77	63%	0	0.80

CASH SHARE
The share of closings paid entirely in cash. Higher readings often point to investors, second-home buyers and downsizers with equity. Regionally, 29 percent of single-family and 54 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 September 2026 data was released on Friday, October 16, 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 September 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 September 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

September 2026

MIDDLETON
TAMPA BAY

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COMPASS

Source: Florida Realtors® Monthly Market Detail, September 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.