

Housing Supply Overview

A RESEARCH TOOL PROVIDED BY SOUTH CAROLINA REALTORS®



July 2025

U.S. new-home sales increased 0.6% month-over-month to a seasonally adjusted annual rate of 627,000 units, according to the U.S. Census Bureau. Despite the monthly gain, sales were down 6.6% from the same period last year. The median sales price for new homes fell 4.9% from the previous month to \$401,800 and was 2.9% lower than a year earlier. There were 511,000 new homes available for sale heading into July, equivalent to a 9.8-month supply at the current sales pace. For the 12-month period spanning August 2024 through July 2025, Pending Sales in the Hilton Head Association of REALTORS® region improved 1.2 percent overall. The price range with the largest pending sales gain was the \$1,000,001 and Above range, where sales improved 17.1 percent.

The overall Median Sales Price went up 2.8 percent to \$550,000. The property type with the largest gain was the Condos segment, where prices went up 4.0 percent to \$447,000. The price range that tended to sell the quickest was the \$750,001 to \$1,000,000 range at 54 days. The price range that tended to sell the slowest was the \$150,000 and Below range at 93 days.

Market-wide, inventory levels was up 27.7 percent. The property type with the largest gain was the Single-Family Homes segment, where the number of properties for sale were up 28.9 percent. That amounts to 4.4 months of inventory for Single-Family Homes and 5.7 months of inventory for Condos.

Quick Facts

+ 17.1%

Price Range with
Strongest Sales:
\$1,000,001 and Above

+ 10.0%

Bedroom Count with
Strongest Sales:
4 Bedrooms or More

+ 2.5%

Property Type With
Strongest Sales:
Single-Family Homes

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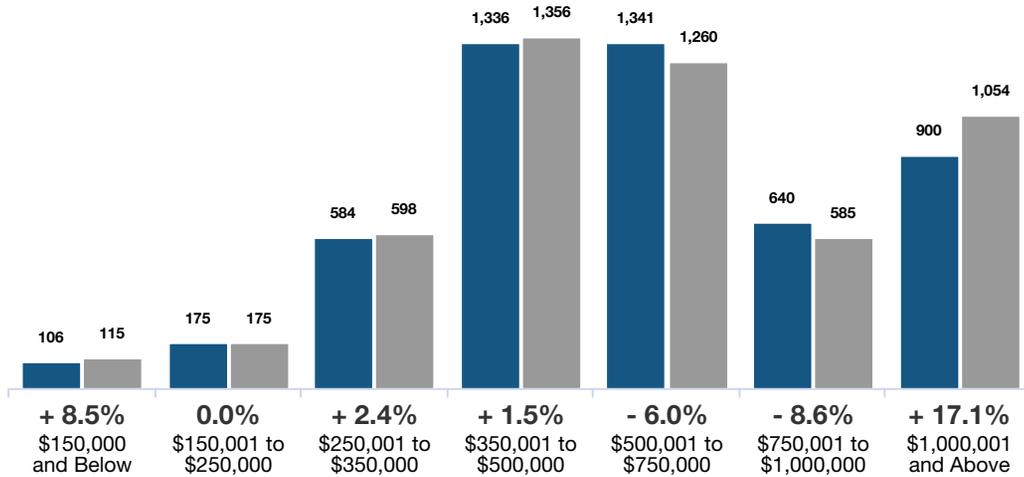
Pending Sales

A count of properties on which offers have been accepted. **Based on a rolling 12-month total.**



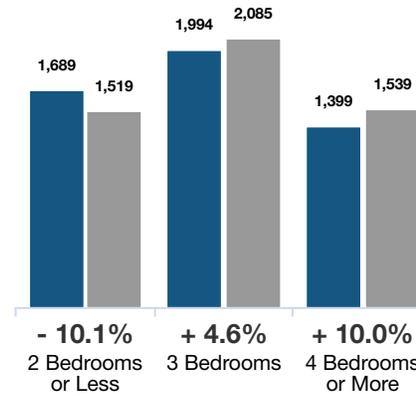
By Price Range

■ 7-2024 ■ 7-2025



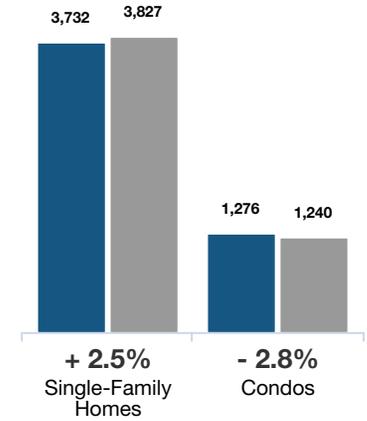
By Bedroom Count

■ 7-2024 ■ 7-2025



By Property Type

■ 7-2024 ■ 7-2025



	All Properties			Single-Family Homes			Condos		
By Price Range	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
\$150,000 and Below	106	115	+ 8.5%	32	28	- 12.5%	7	15	+ 114.3%
\$150,001 to \$250,000	175	175	0.0%	40	57	+ 42.5%	135	116	- 14.1%
\$250,001 to \$350,000	584	598	+ 2.4%	275	299	+ 8.7%	309	299	- 3.2%
\$350,001 to \$500,000	1,336	1,356	+ 1.5%	1,055	1,087	+ 3.0%	280	269	- 3.9%
\$500,001 to \$750,000	1,341	1,260	- 6.0%	1,017	945	- 7.1%	319	314	- 1.6%
\$750,001 to \$1,000,000	640	585	- 8.6%	491	459	- 6.5%	148	125	- 15.5%
\$1,000,001 and Above	900	1,054	+ 17.1%	822	952	+ 15.8%	78	102	+ 30.8%
All Price Ranges	5,082	5,143	+ 1.2%	3,732	3,827	+ 2.5%	1,276	1,240	- 2.8%
By Bedroom Count	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
2 Bedrooms or Less	1,689	1,519	- 10.1%	791	680	- 14.0%	846	788	- 6.9%
3 Bedrooms	1,994	2,085	+ 4.6%	1,606	1,692	+ 5.4%	374	370	- 1.1%
4 Bedrooms or More	1,399	1,539	+ 10.0%	1,335	1,455	+ 9.0%	56	82	+ 46.4%
All Bedroom Counts	5,082	5,143	+ 1.2%	3,732	3,827	+ 2.5%	1,276	1,240	- 2.8%

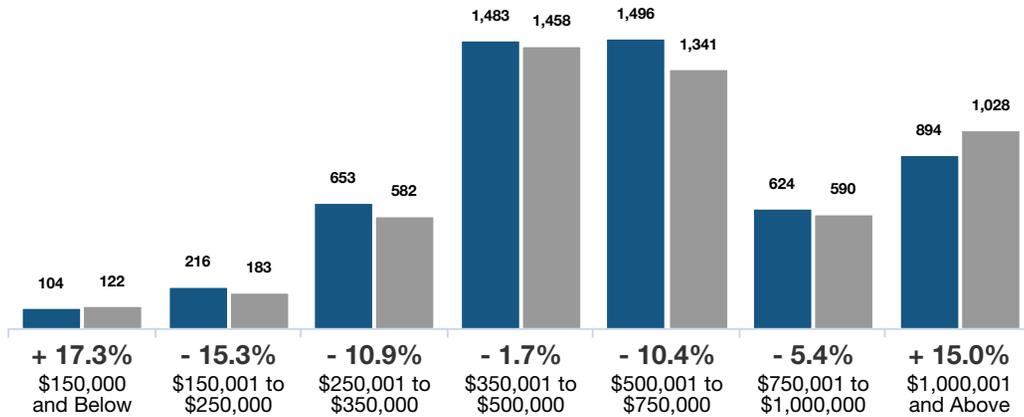
Closed Sales

A count of the actual sales that closed. **Based on a rolling 12-month total.**



By Price Range

■ 7-2024 ■ 7-2025



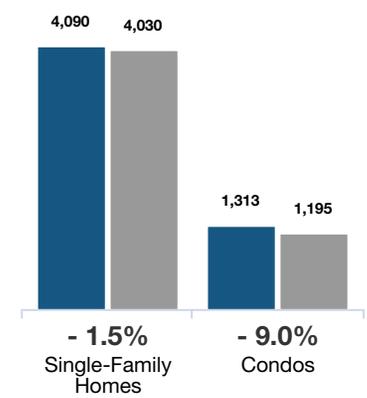
By Bedroom Count

■ 7-2024 ■ 7-2025



By Property Type

■ 7-2024 ■ 7-2025



All Properties

By Price Range	7-2024	7-2025	Change
\$150,000 and Below	104	122	+ 17.3%
\$150,001 to \$250,000	216	183	- 15.3%
\$250,001 to \$350,000	653	582	- 10.9%
\$350,001 to \$500,000	1,483	1,458	- 1.7%
\$500,001 to \$750,000	1,496	1,341	- 10.4%
\$750,001 to \$1,000,000	624	590	- 5.4%
\$1,000,001 and Above	894	1,028	+ 15.0%
All Price Ranges	5,470	5,304	- 3.0%

Single-Family Homes

By Bedroom Count	7-2024	7-2025	Change
2 Bedrooms or Less	1,954	1,702	- 12.9%
3 Bedrooms	2,100	2,068	- 1.5%
4 Bedrooms or More	1,416	1,534	+ 8.3%
All Bedroom Counts	5,470	5,304	- 3.0%

Condos

By Price Range	7-2024	7-2025	Change
\$150,000 and Below	35	32	- 8.6%
\$150,001 to \$250,000	42	50	+ 19.0%
\$250,001 to \$350,000	334	298	- 10.8%
\$350,001 to \$500,000	1,209	1,200	- 0.7%
\$500,001 to \$750,000	1,170	1,052	- 10.1%
\$750,001 to \$1,000,000	487	473	- 2.9%
\$1,000,001 and Above	813	925	+ 13.8%
All Price Ranges	4,090	4,030	- 1.5%

By Price Range	7-2024	7-2025	Change
\$150,000 and Below	9	14	+ 55.6%
\$150,001 to \$250,000	174	132	- 24.1%
\$250,001 to \$350,000	319	284	- 11.0%
\$350,001 to \$500,000	273	258	- 5.5%
\$500,001 to \$750,000	321	288	- 10.3%
\$750,001 to \$1,000,000	136	116	- 14.7%
\$1,000,001 and Above	81	103	+ 27.2%
All Price Ranges	1,313	1,195	- 9.0%

By Bedroom Count	7-2024	7-2025	Change
2 Bedrooms or Less	1,030	908	- 11.8%
3 Bedrooms	1,702	1,675	- 1.6%
4 Bedrooms or More	1,358	1,447	+ 6.6%
All Bedroom Counts	4,090	4,030	- 1.5%

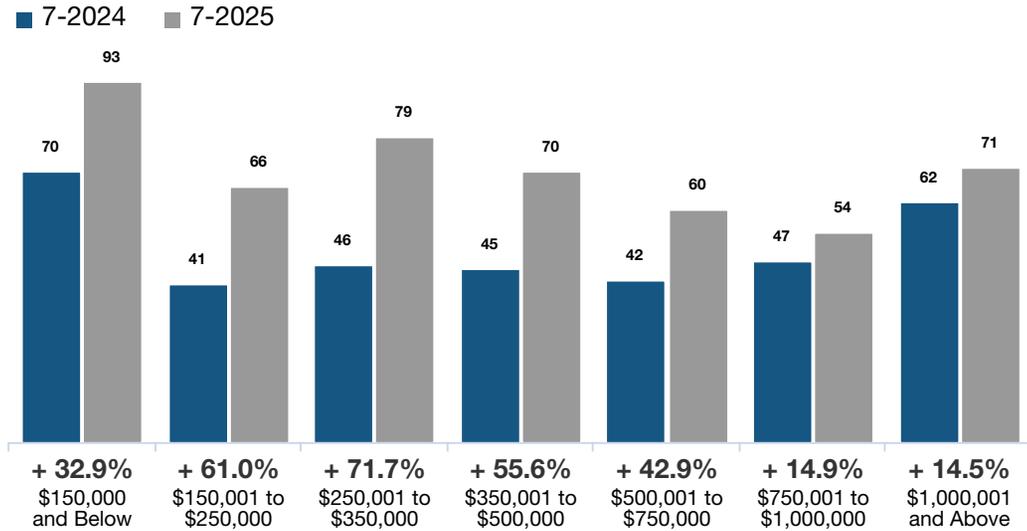
Days On Market Until Sale

Average number of days between when a property is listed and when an offer is accepted.

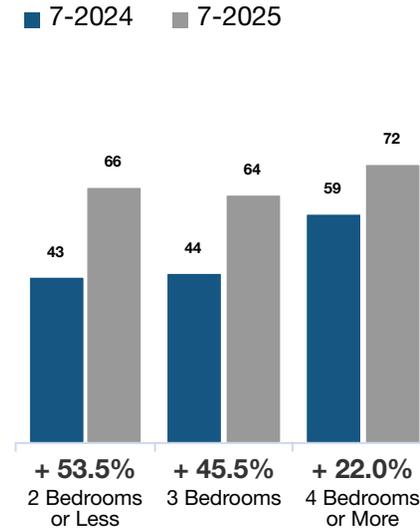
Based on a rolling 12-month average.



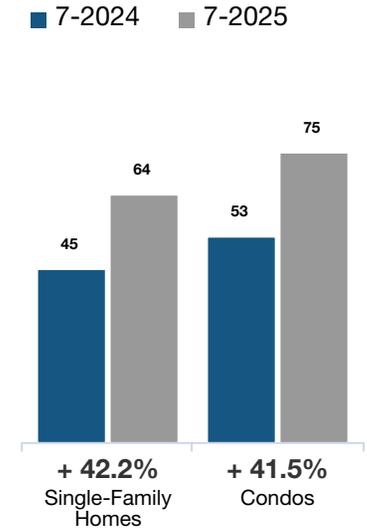
By Price Range



By Bedroom Count



By Property Type



	All Properties			Single-Family Homes			Condos		
By Price Range	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
\$150,000 and Below	70	93	+ 32.9%	56	79	+ 41.1%	31	39	+ 25.8%
\$150,001 to \$250,000	41	66	+ 61.0%	44	70	+ 59.1%	40	61	+ 52.5%
\$250,001 to \$350,000	46	79	+ 71.7%	27	67	+ 148.1%	65	91	+ 40.0%
\$350,001 to \$500,000	45	70	+ 55.6%	42	69	+ 64.3%	56	78	+ 39.3%
\$500,001 to \$750,000	42	60	+ 42.9%	40	54	+ 35.0%	46	80	+ 73.9%
\$750,001 to \$1,000,000	47	54	+ 14.9%	47	54	+ 14.9%	44	54	+ 22.7%
\$1,000,001 and Above	62	71	+ 14.5%	61	72	+ 18.0%	68	60	- 11.8%
All Price Ranges	47	67	+ 42.6%	45	64	+ 42.2%	53	75	+ 41.5%
By Bedroom Count	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
2 Bedrooms or Less	43	66	+ 53.5%	32	50	+ 56.2%	52	82	+ 57.7%
3 Bedrooms	44	64	+ 45.5%	41	64	+ 56.1%	55	65	+ 18.2%
4 Bedrooms or More	59	72	+ 22.0%	59	72	+ 22.0%	49	67	+ 36.7%
All Bedroom Counts	47	67	+ 42.6%	45	64	+ 42.2%	53	75	+ 41.5%

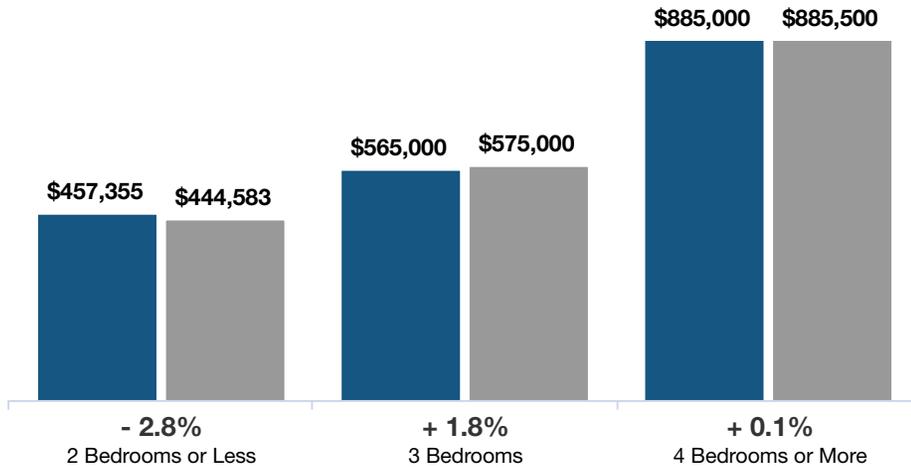
Median Sales Price

Median price point for all closed sales, not accounting for seller concessions. **Based on a rolling 12-month median.**



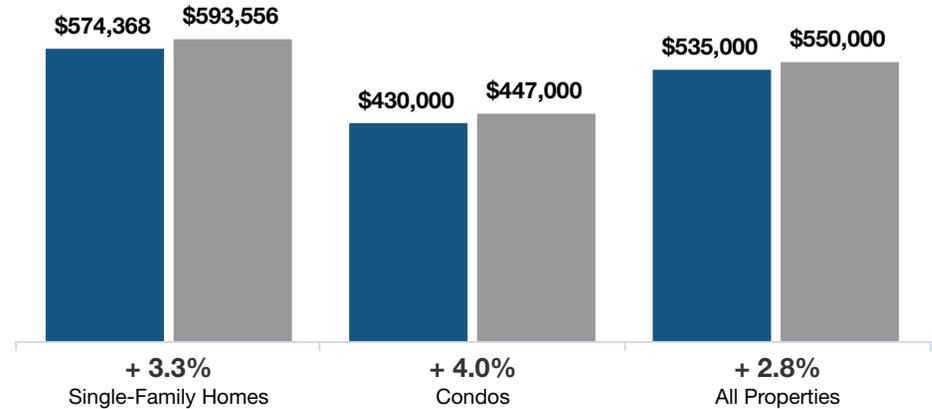
By Bedroom Count

■ 7-2024 ■ 7-2025



By Property Type

■ 7-2024 ■ 7-2025



All Properties

By Bedroom Count

	7-2024	7-2025	Change
2 Bedrooms or Less	\$457,355	\$444,583	- 2.8%
3 Bedrooms	\$565,000	\$575,000	+ 1.8%
4 Bedrooms or More	\$885,000	\$885,500	+ 0.1%
All Bedroom Counts	\$535,000	\$550,000	+ 2.8%

Single-Family Homes

	7-2024	7-2025	Change
Single-Family Homes	\$485,000	\$475,000	- 2.1%
Single-Family Homes	\$580,000	\$594,950	+ 2.6%
Single-Family Homes	\$899,000	\$925,000	+ 2.9%
All Single-Family Homes	\$574,368	\$593,556	+ 3.3%

Condos

	7-2024	7-2025	Change
Condos	\$375,750	\$388,000	+ 3.3%
Condos	\$508,000	\$499,900	- 1.6%
Condos	\$672,120	\$715,000	+ 6.4%
All Condos	\$430,000	\$447,000	+ 4.0%

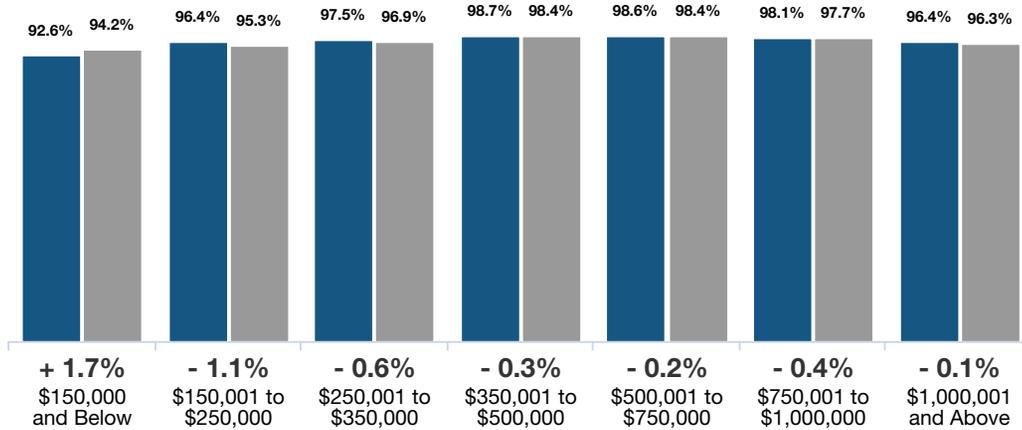
Percent of List Price Received



Percentage found when dividing a property's sales price by its last list price, then taking the average for all properties sold, not accounting for seller concessions. **Based on a rolling 12-month average.**

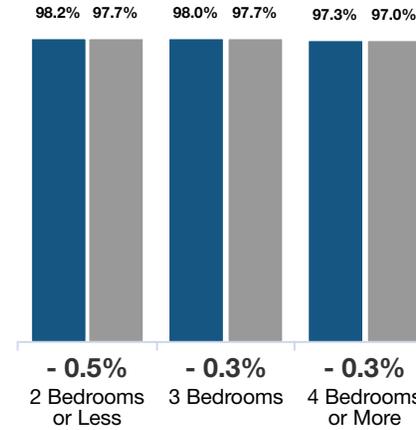
By Price Range

■ 7-2024 ■ 7-2025



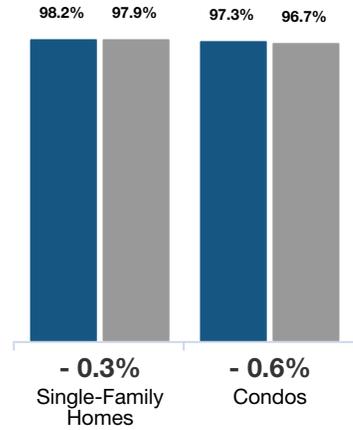
By Bedroom Count

■ 7-2024 ■ 7-2025



By Property Type

■ 7-2024 ■ 7-2025



	All Properties			Single-Family Homes			Condos		
By Price Range	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
\$150,000 and Below	92.6%	94.2%	+ 1.7%	94.8%	100.4%	+ 5.9%	95.2%	90.3%	- 5.1%
\$150,001 to \$250,000	96.4%	95.3%	- 1.1%	94.2%	95.7%	+ 1.6%	96.9%	95.2%	- 1.8%
\$250,001 to \$350,000	97.5%	96.9%	- 0.6%	98.0%	97.4%	- 0.6%	97.1%	96.4%	- 0.7%
\$350,001 to \$500,000	98.7%	98.4%	- 0.3%	99.0%	98.6%	- 0.4%	97.0%	97.2%	+ 0.2%
\$500,001 to \$750,000	98.6%	98.4%	- 0.2%	98.9%	98.7%	- 0.2%	97.7%	96.9%	- 0.8%
\$750,001 to \$1,000,000	98.1%	97.7%	- 0.4%	98.2%	97.6%	- 0.6%	97.8%	97.8%	0.0%
\$1,000,001 and Above	96.4%	96.3%	- 0.1%	96.3%	96.1%	- 0.2%	97.3%	97.3%	0.0%
All Price Ranges	97.9%	97.5%	- 0.4%	98.2%	97.9%	- 0.3%	97.3%	96.7%	- 0.6%
By Bedroom Count	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
2 Bedrooms or Less	98.2%	97.7%	- 0.5%	99.5%	99.2%	- 0.3%	97.1%	96.3%	- 0.8%
3 Bedrooms	98.0%	97.7%	- 0.3%	98.1%	97.8%	- 0.3%	97.7%	97.4%	- 0.3%
4 Bedrooms or More	97.3%	97.0%	- 0.3%	97.3%	97.0%	- 0.3%	96.8%	97.8%	+ 1.0%
All Bedroom Counts	97.9%	97.5%	- 0.4%	98.2%	97.9%	- 0.3%	97.3%	96.7%	- 0.6%

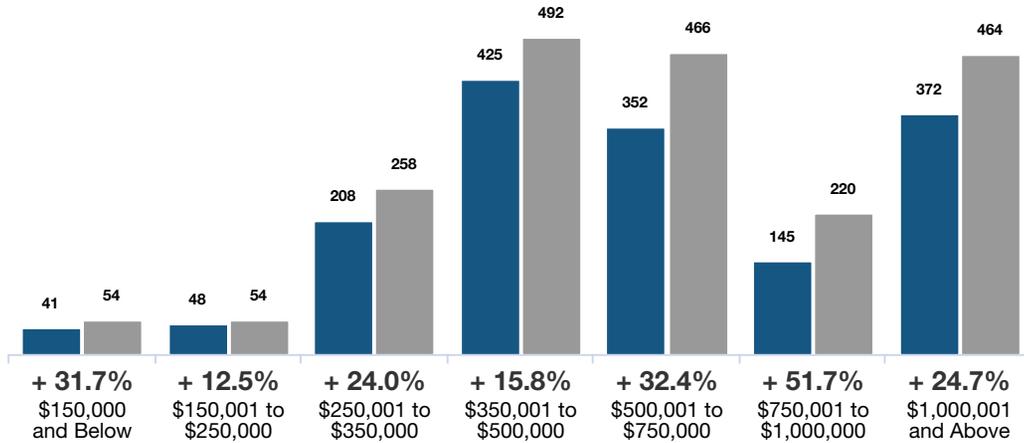
Inventory of Homes for Sale



The number of properties available for sale in active status at the end of the most recent month. **Based on one month of activity.**

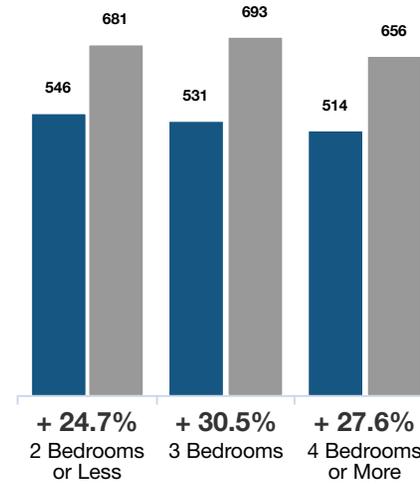
By Price Range

■ 7-2024 ■ 7-2025



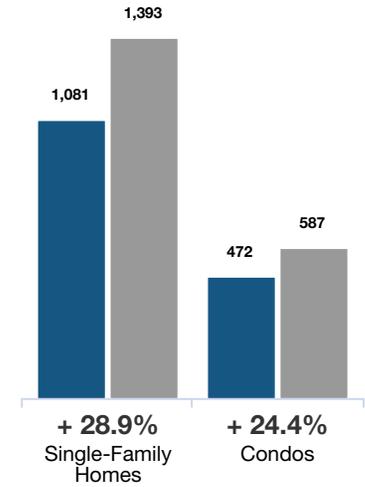
By Bedroom Count

■ 7-2024 ■ 7-2025



By Property Type

■ 7-2024 ■ 7-2025



	All Properties			Single-Family Homes			Condos		
By Price Range	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
\$150,000 and Below	41	54	+ 31.7%	7	6	- 14.3%	1	2	+ 100.0%
\$150,001 to \$250,000	48	54	+ 12.5%	21	14	- 33.3%	25	39	+ 56.0%
\$250,001 to \$350,000	208	258	+ 24.0%	58	75	+ 29.3%	150	182	+ 21.3%
\$350,001 to \$500,000	425	492	+ 15.8%	308	358	+ 16.2%	117	134	+ 14.5%
\$500,001 to \$750,000	352	466	+ 32.4%	246	328	+ 33.3%	105	137	+ 30.5%
\$750,001 to \$1,000,000	145	220	+ 51.7%	111	178	+ 60.4%	32	40	+ 25.0%
\$1,000,001 and Above	372	464	+ 24.7%	330	414	+ 25.5%	42	50	+ 19.0%
All Price Ranges	1,591	2,031	+ 27.7%	1,081	1,393	+ 28.9%	472	587	+ 24.4%
By Bedroom Count	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
2 Bedrooms or Less	546	681	+ 24.7%	178	224	+ 25.8%	340	413	+ 21.5%
3 Bedrooms	531	693	+ 30.5%	414	557	+ 34.5%	111	132	+ 18.9%
4 Bedrooms or More	514	656	+ 27.6%	489	611	+ 24.9%	21	42	+ 100.0%
All Bedroom Counts	1,591	2,031	+ 27.7%	1,081	1,393	+ 28.9%	472	587	+ 24.4%

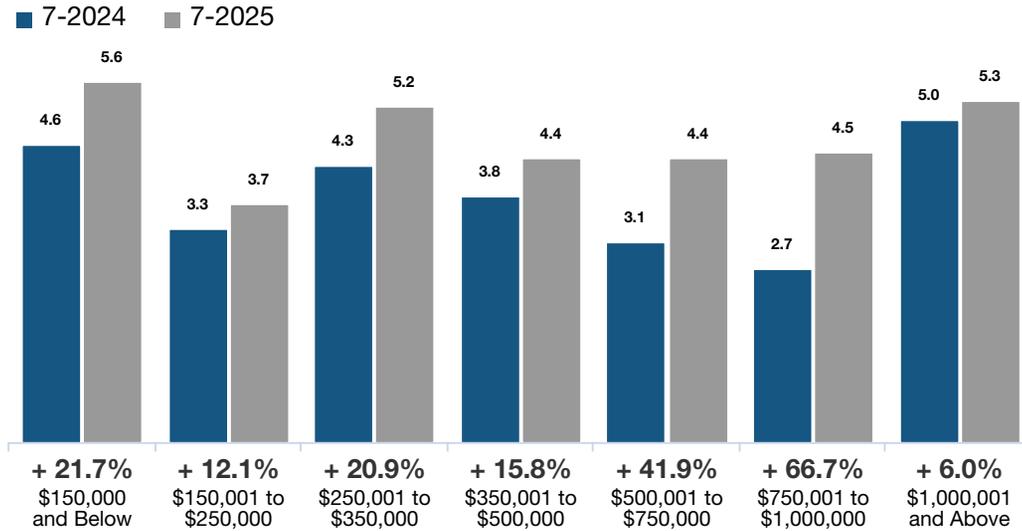
Months Supply of Inventory



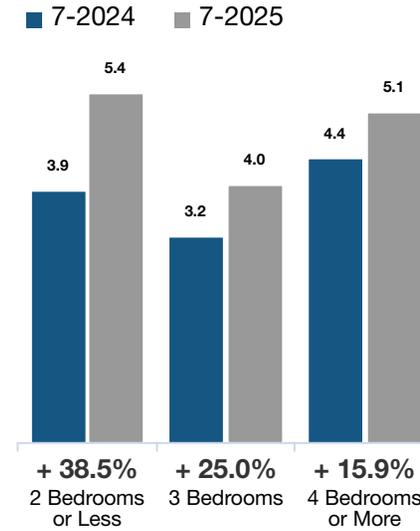
The inventory of homes for sale at the end of the most recent month, divided by the average monthly pending sales from the last 12 months.

Based on one month of activity.

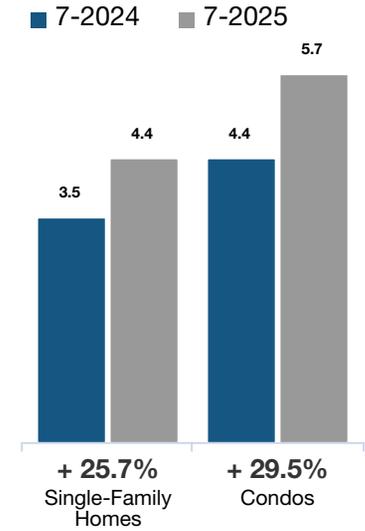
By Price Range



By Bedroom Count



By Property Type



	All Properties			Single-Family Homes			Condos		
By Price Range	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
\$150,000 and Below	4.6	5.6	+ 21.7%	2.6	2.6	0.0%	0.9	0.9	0.0%
\$150,001 to \$250,000	3.3	3.7	+ 12.1%	5.8	2.9	- 50.0%	2.2	4.0	+ 81.8%
\$250,001 to \$350,000	4.3	5.2	+ 20.9%	2.5	3.0	+ 20.0%	5.8	7.3	+ 25.9%
\$350,001 to \$500,000	3.8	4.4	+ 15.8%	3.5	4.0	+ 14.3%	5.0	6.0	+ 20.0%
\$500,001 to \$750,000	3.1	4.4	+ 41.9%	2.9	4.2	+ 44.8%	3.9	5.2	+ 33.3%
\$750,001 to \$1,000,000	2.7	4.5	+ 66.7%	2.7	4.7	+ 74.1%	2.6	3.8	+ 46.2%
\$1,000,001 and Above	5.0	5.3	+ 6.0%	4.8	5.2	+ 8.3%	6.5	5.9	- 9.2%
All Price Ranges	3.8	4.7	+ 23.7%	3.5	4.4	+ 25.7%	4.4	5.7	+ 29.5%
By Bedroom Count	7-2024	7-2025	Change	7-2024	7-2025	Change	7-2024	7-2025	Change
2 Bedrooms or Less	3.9	5.4	+ 38.5%	2.7	4.0	+ 48.1%	4.8	6.3	+ 31.2%
3 Bedrooms	3.2	4.0	+ 25.0%	3.1	4.0	+ 29.0%	3.6	4.3	+ 19.4%
4 Bedrooms or More	4.4	5.1	+ 15.9%	4.4	5.0	+ 13.6%	4.1	6.1	+ 48.8%
All Bedroom Counts	3.8	4.7	+ 23.7%	3.5	4.4	+ 25.7%	4.4	5.7	+ 29.5%