

Housing Supply Overview

A RESEARCH TOOL PROVIDED BY SOUTH CAROLINA REALTORS®



September 2025

U.S. new-home sales unexpectedly surged 20.5% month-over-month and 15.4% year-over-year to a seasonally adjusted annual rate of 800,000 units, the highest level since January 2022, according to the U.S. Census Bureau. Economists polled by Reuters had forecast new-home sales would decline to 650,000 units. There were 490,000 new homes for sale going into September, equivalent to a 7.4-month supply at the current sales pace. For the 12-month period spanning October 2024 through September 2025, Pending Sales in the Hilton Head Association of REALTORS® region went up 8.4 percent overall. The price range with the largest pending sales gain was the \$1,000,001 and Above range, where sales increased 17.2 percent.

The overall Median Sales Price increased 1.7 percent to \$550,000. The property type with the largest gain was the Single-Family Homes segment, where prices went up 4.0 percent to \$600,000. The price range that tended to sell the quickest was the \$750,001 to \$1,000,000 range at 65 days. The price range that tended to sell the slowest was the \$150,000 and Below range at 106 days.

Market-wide, inventory levels increased 19.5 percent. The property type with the largest gain was the Single-Family Homes segment, where the number of properties for sale went up 18.7 percent. That amounts to 4.1 months of inventory for Single-Family Homes and 5.5 months of inventory for Condos.

Quick Facts

+ 17.2%	+ 16.8%	+ 11.0%
Price Range with Strongest Sales: \$1,000,001 and Above	Bedroom Count with Strongest Sales: 4 Bedrooms or More	Property Type With Strongest Sales: Single-Family Homes
Pending Sales	2	
Closed Sales	3	
Days On Market Until Sale	4	
Median Sales Price	5	
Percent of List Price Received	6	
Inventory of Homes for Sale	7	
Months Supply of Inventory	8	



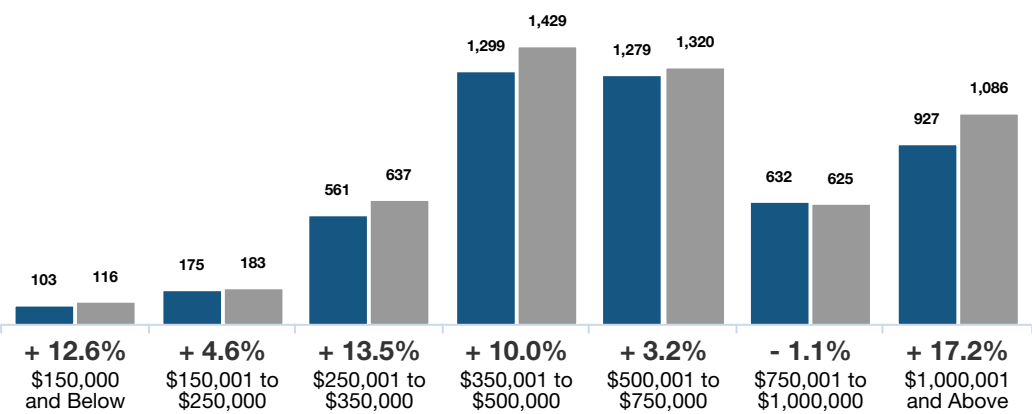
Pending Sales

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



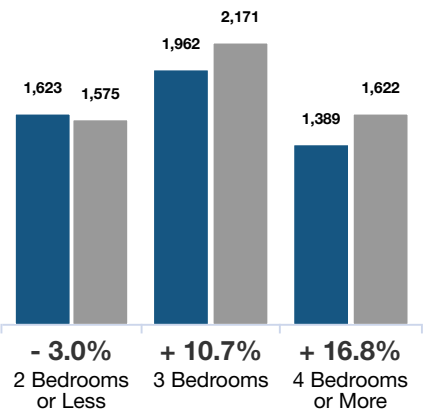
By Price Range

■ 9-2024 ■ 9-2025



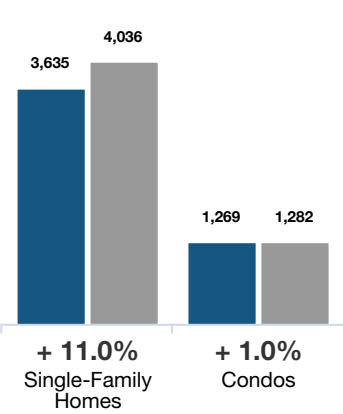
By Bedroom Count

■ 9-2024 ■ 9-2025



By Property Type

■ 9-2024 ■ 9-2025



All Properties				Single-Family Homes			Condos		
By Price Range	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
\$150,000 and Below	103	116	+ 12.6%	28	30	+ 7.1%	9	14	+ 55.6%
\$150,001 to \$250,000	175	183	+ 4.6%	45	59	+ 31.1%	130	121	- 6.9%
\$250,001 to \$350,000	561	637	+ 13.5%	254	323	+ 27.2%	307	314	+ 2.3%
\$350,001 to \$500,000	1,299	1,429	+ 10.0%	1,015	1,145	+ 12.8%	283	283	0.0%
\$500,001 to \$750,000	1,279	1,320	+ 3.2%	962	1,009	+ 4.9%	313	310	- 1.0%
\$750,001 to \$1,000,000	632	625	- 1.1%	486	493	+ 1.4%	145	131	- 9.7%
\$1,000,001 and Above	927	1,086	+ 17.2%	845	977	+ 15.6%	82	109	+ 32.9%
All Price Ranges	4,976	5,396	+ 8.4%	3,635	4,036	+ 11.0%	1,269	1,282	+ 1.0%
By Bedroom Count	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
2 Bedrooms or Less	1,623	1,575	- 3.0%	736	713	- 3.1%	837	812	- 3.0%
3 Bedrooms	1,962	2,171	+ 10.7%	1,570	1,774	+ 13.0%	377	372	- 1.3%
4 Bedrooms or More	1,389	1,622	+ 16.8%	1,329	1,539	+ 15.8%	53	81	+ 52.8%
All Bedroom Counts	4,976	5,396	+ 8.4%	3,635	4,036	+ 11.0%	1,269	1,282	+ 1.0%

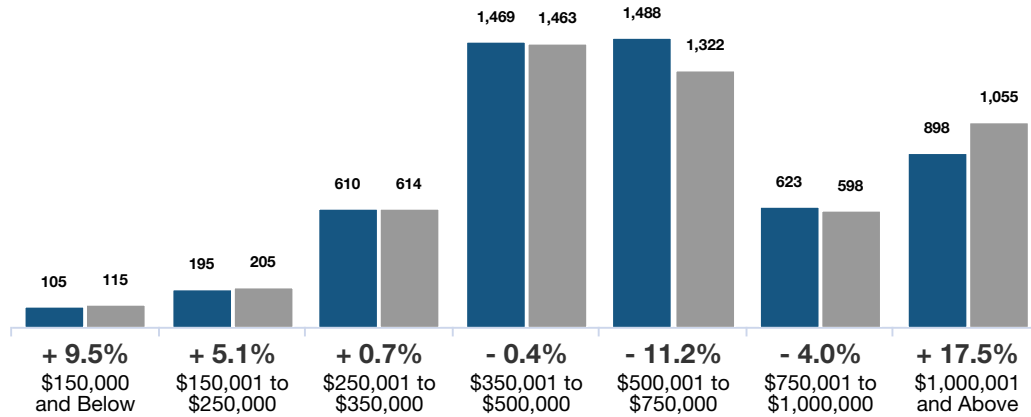
Closed Sales

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



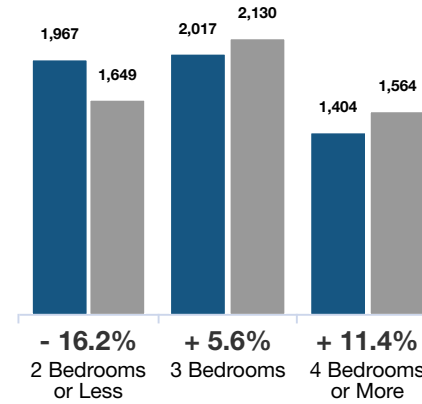
By Price Range

■ 9-2024 ■ 9-2025



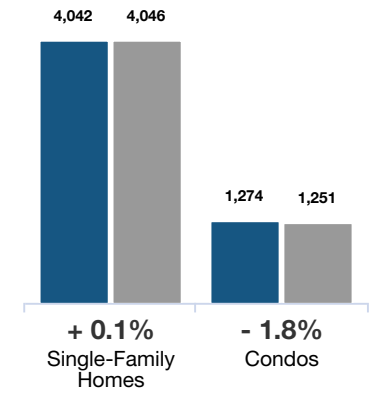
By Bedroom Count

■ 9-2024 ■ 9-2025



By Property Type

■ 9-2024 ■ 9-2025



All Properties				Single-Family Homes			Condos		
By Price Range	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
\$150,000 and Below	105	115	+ 9.5%	31	30	- 3.2%	9	15	+ 66.7%
\$150,001 to \$250,000	195	205	+ 5.1%	36	62	+ 72.2%	159	141	- 11.3%
\$250,001 to \$350,000	610	614	+ 0.7%	289	311	+ 7.6%	321	303	- 5.6%
\$350,001 to \$500,000	1,469	1,463	- 0.4%	1,203	1,196	- 0.6%	265	266	+ 0.4%
\$500,001 to \$750,000	1,488	1,322	- 11.2%	1,174	1,017	- 13.4%	309	304	- 1.6%
\$750,001 to \$1,000,000	623	598	- 4.0%	488	483	- 1.0%	134	114	- 14.9%
\$1,000,001 and Above	898	1,055	+ 17.5%	821	947	+ 15.3%	77	108	+ 40.3%
All Price Ranges	5,388	5,372	- 0.3%	4,042	4,046	+ 0.1%	1,274	1,251	- 1.8%
By Bedroom Count	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
2 Bedrooms or Less	1,967	1,649	- 16.2%	1,070	816	- 23.7%	846	786	- 7.1%
3 Bedrooms	2,017	2,130	+ 5.6%	1,625	1,745	+ 7.4%	379	360	- 5.0%
4 Bedrooms or More	1,404	1,564	+ 11.4%	1,347	1,476	+ 9.6%	49	86	+ 75.5%
All Bedroom Counts	5,388	5,372	- 0.3%	4,042	4,046	+ 0.1%	1,274	1,251	- 1.8%

Days On Market Until Sale

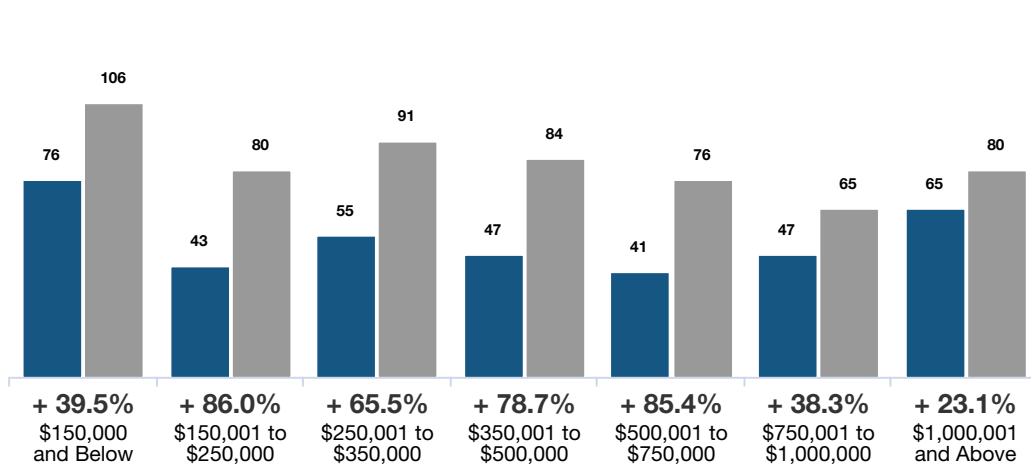
Average number of days between when a property is listed and when an offer is accepted.

Based on a rolling 12-month average.



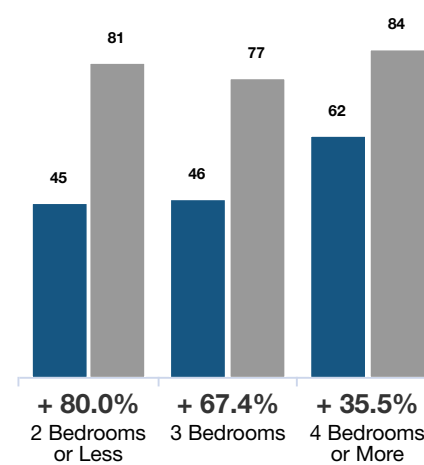
By Price Range

■ 9-2024 ■ 9-2025



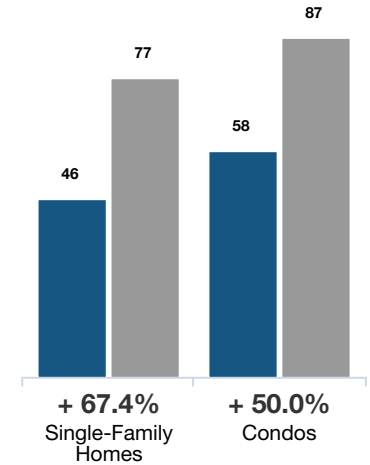
By Bedroom Count

■ 9-2024 ■ 9-2025



By Property Type

■ 9-2024 ■ 9-2025



All Properties				Single-Family Homes			Condos		
By Price Range	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
\$150,000 and Below	76	106	+ 39.5%	65	85	+ 30.8%	30	43	+ 43.3%
\$150,001 to \$250,000	43	80	+ 86.0%	34	79	+ 132.4%	45	78	+ 73.3%
\$250,001 to \$350,000	55	91	+ 65.5%	35	80	+ 128.6%	73	103	+ 41.1%
\$350,001 to \$500,000	47	84	+ 78.7%	44	82	+ 86.4%	61	95	+ 55.7%
\$500,001 to \$750,000	41	76	+ 85.4%	38	72	+ 89.5%	52	88	+ 69.2%
\$750,001 to \$1,000,000	47	65	+ 38.3%	48	65	+ 35.4%	43	65	+ 51.2%
\$1,000,001 and Above	65	80	+ 23.1%	65	81	+ 24.6%	69	65	- 5.8%
All Price Ranges	50	80	+ 60.0%	46	77	+ 67.4%	58	87	+ 50.0%
By Bedroom Count	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
2 Bedrooms or Less	45	81	+ 80.0%	32	65	+ 103.1%	58	93	+ 60.3%
3 Bedrooms	46	77	+ 67.4%	43	77	+ 79.1%	60	78	+ 30.0%
4 Bedrooms or More	62	84	+ 35.5%	62	84	+ 35.5%	51	75	+ 47.1%
All Bedroom Counts	50	80	+ 60.0%	46	77	+ 67.4%	58	87	+ 50.0%

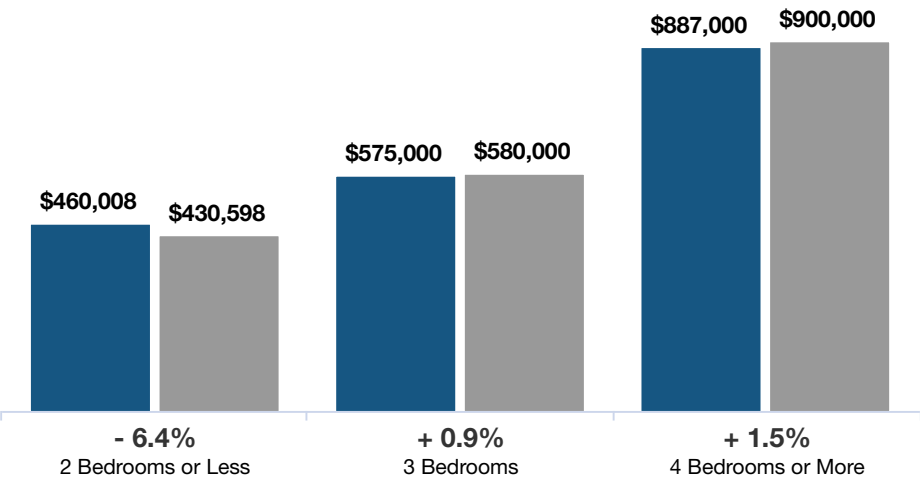
Median Sales Price

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



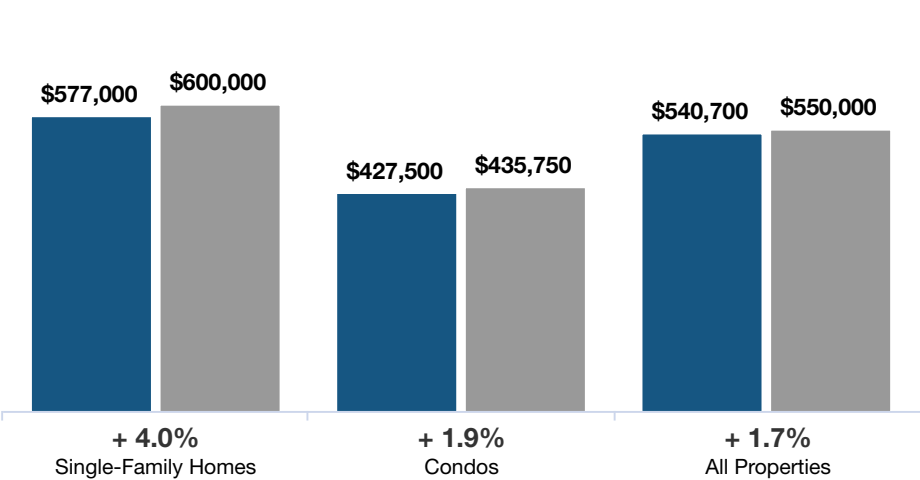
By Bedroom Count

■ 9-2024 ■ 9-2025



By Property Type

■ 9-2024 ■ 9-2025



All Properties

By Bedroom Count	9-2024	9-2025	Change
2 Bedrooms or Less	\$460,008	\$430,598	- 6.4%
3 Bedrooms	\$575,000	\$580,000	+ 0.9%
4 Bedrooms or More	\$887,000	\$900,000	+ 1.5%
All Bedroom Counts	\$540,700	\$550,000	+ 1.7%

Single-Family Homes

9-2024	9-2025	Change
\$489,260	\$467,040	- 4.5%
\$589,950	\$595,000	+ 0.9%
\$899,000	\$930,000	+ 3.4%
\$577,000	\$600,000	+ 4.0%

Condos

9-2024	9-2025	Change
\$375,000	\$377,500	+ 0.7%
\$518,110	\$525,000	+ 1.3%
\$705,000	\$731,144	+ 3.7%
\$427,500	\$435,750	+ 1.9%

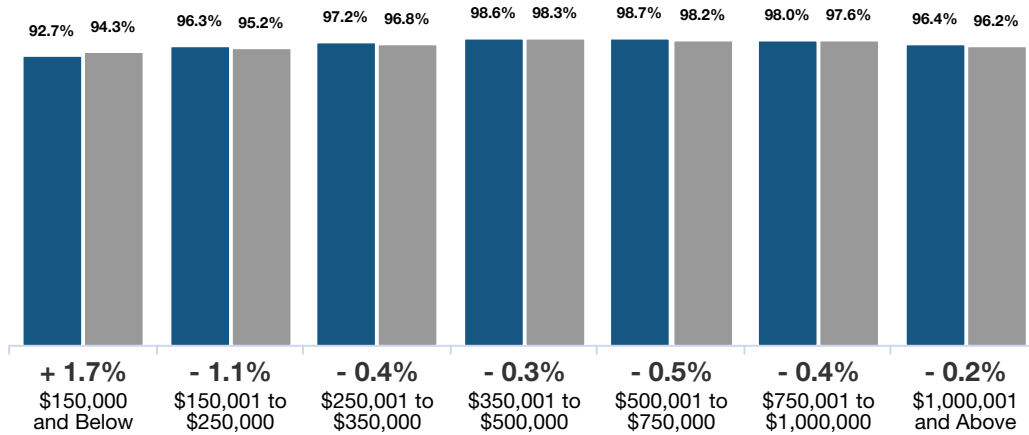
Percent of List Price Received



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.**

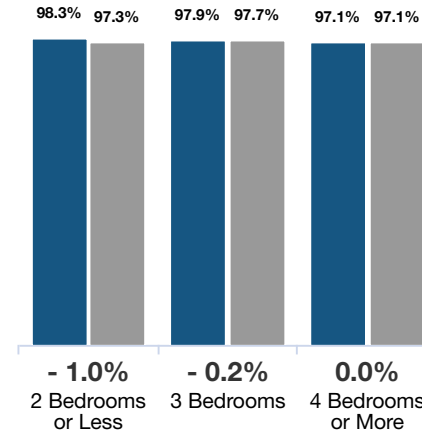
By Price Range

■ 9-2024 ■ 9-2025



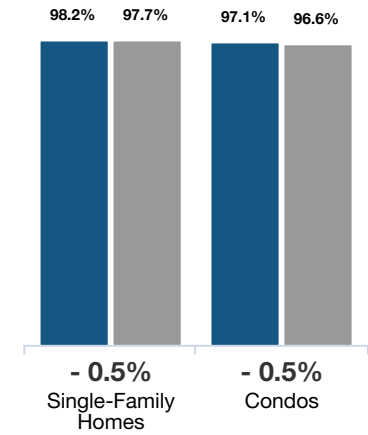
By Bedroom Count

■ 9-2024 ■ 9-2025



By Property Type

■ 9-2024 ■ 9-2025



All Properties				Single-Family Homes			Condos		
By Price Range	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
\$150,000 and Below	92.7%	94.3%	+ 1.7%	93.2%	101.9%	+ 9.3%	95.9%	88.5%	- 7.7%
\$150,001 to \$250,000	96.3%	95.2%	- 1.1%	95.6%	95.3%	- 0.3%	96.4%	95.1%	- 1.3%
\$250,001 to \$350,000	97.2%	96.8%	- 0.4%	97.5%	97.4%	- 0.1%	96.9%	96.2%	- 0.7%
\$350,001 to \$500,000	98.6%	98.3%	- 0.3%	99.0%	98.5%	- 0.5%	96.8%	97.2%	+ 0.4%
\$500,001 to \$750,000	98.7%	98.2%	- 0.5%	99.0%	98.5%	- 0.5%	97.4%	97.0%	- 0.4%
\$750,001 to \$1,000,000	98.0%	97.6%	- 0.4%	98.1%	97.5%	- 0.6%	97.8%	97.7%	- 0.1%
\$1,000,001 and Above	96.4%	96.2%	- 0.2%	96.3%	96.1%	- 0.2%	97.6%	97.0%	- 0.6%
All Price Ranges	97.8%	97.4%	- 0.4%	98.2%	97.7%	- 0.5%	97.1%	96.6%	- 0.5%
By Bedroom Count	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
2 Bedrooms or Less	98.3%	97.3%	- 1.0%	99.7%	98.9%	- 0.8%	96.9%	96.1%	- 0.8%
3 Bedrooms	97.9%	97.7%	- 0.2%	98.0%	97.7%	- 0.3%	97.4%	97.4%	0.0%
4 Bedrooms or More	97.1%	97.1%	0.0%	97.1%	97.1%	0.0%	96.8%	97.7%	+ 0.9%
All Bedroom Counts	97.8%	97.4%	- 0.4%	98.2%	97.7%	- 0.5%	97.1%	96.6%	- 0.5%

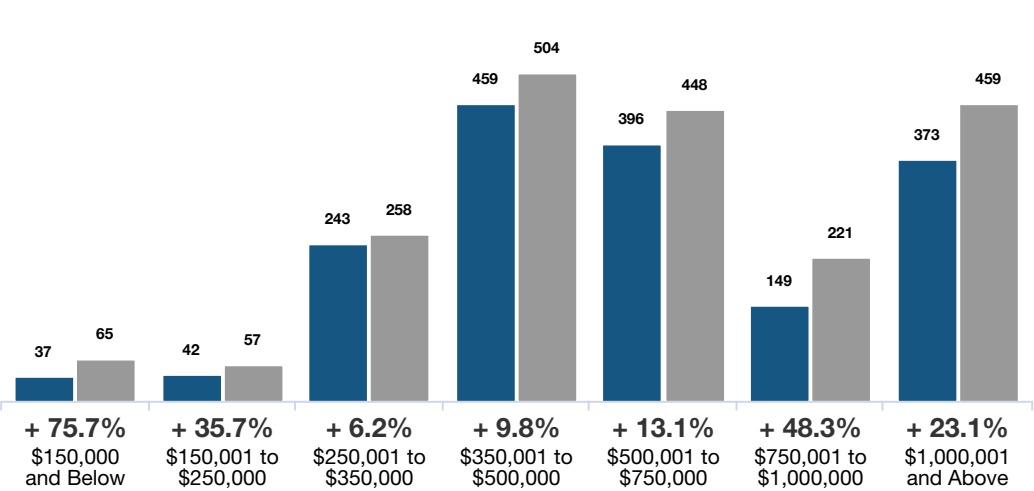
Inventory of Homes for Sale

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



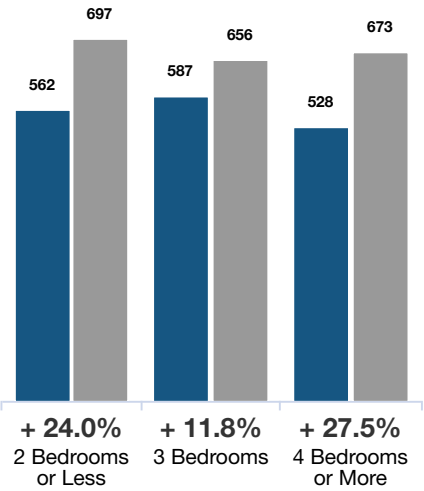
By Price Range

■ 9-2024 ■ 9-2025



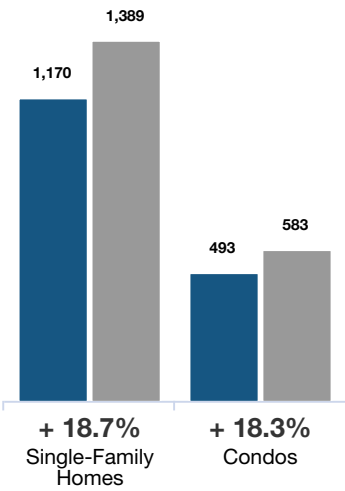
By Bedroom Count

■ 9-2024 ■ 9-2025



By Property Type

■ 9-2024 ■ 9-2025



All Properties				Single-Family Homes			Condos		
By Price Range	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
\$150,000 and Below	37	65	+ 75.7%	6	7	+ 16.7%	2	4	+ 100.0%
\$150,001 to \$250,000	42	57	+ 35.7%	21	10	- 52.4%	19	47	+ 147.4%
\$250,001 to \$350,000	243	258	+ 6.2%	79	86	+ 8.9%	164	171	+ 4.3%
\$350,001 to \$500,000	459	504	+ 9.8%	334	359	+ 7.5%	124	145	+ 16.9%
\$500,001 to \$750,000	396	448	+ 13.1%	288	314	+ 9.0%	106	133	+ 25.5%
\$750,001 to \$1,000,000	149	221	+ 48.3%	110	182	+ 65.5%	37	37	0.0%
\$1,000,001 and Above	373	459	+ 23.1%	332	416	+ 25.3%	41	43	+ 4.9%
All Price Ranges	1,699	2,031	+ 19.5%	1,170	1,389	+ 18.7%	493	583	+ 18.3%
By Bedroom Count	9-2024	9-2025	Change	9-2024	9-2025	Change	9-2024	9-2025	Change
2 Bedrooms or Less	562	697	+ 24.0%	198	229	+ 15.7%	337	417	+ 23.7%
3 Bedrooms	587	656	+ 11.8%	474	522	+ 10.1%	110	129	+ 17.3%
4 Bedrooms or More	528	673	+ 27.5%	491	633	+ 28.9%	32	37	+ 15.6%
All Bedroom Counts	1,699	2,031	+ 19.5%	1,170	1,389	+ 18.7%	493	583	+ 18.3%

Months Supply of Inventory

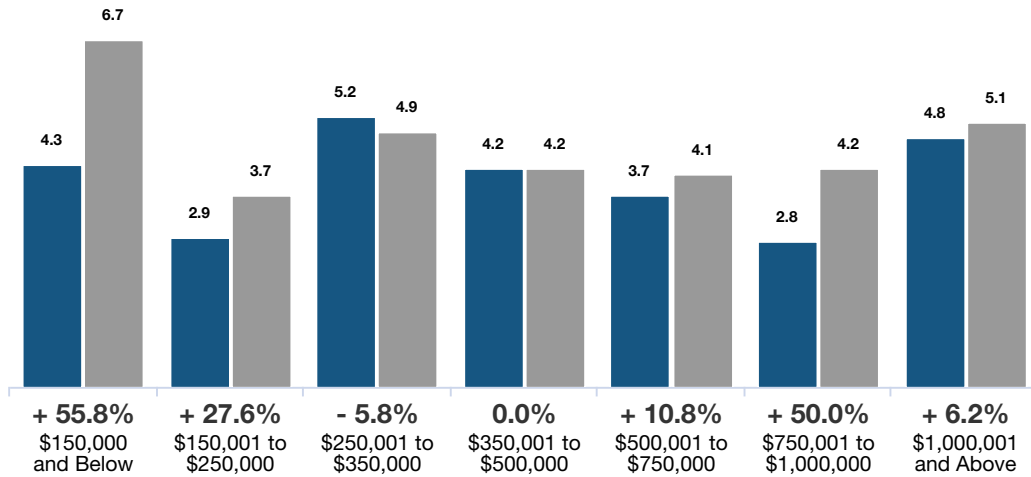
The inventory of homes for sale at the end of the most recent month, divided by the average monthly pending sales from the last 12 months.

Based on one month of activity.



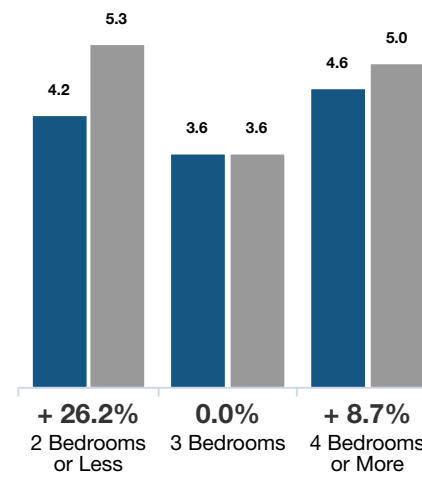
By Price Range

■ 9-2024 ■ 9-2025



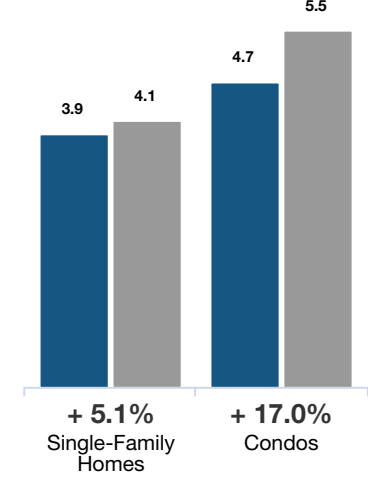
By Bedroom Count

■ 9-2024 ■ 9-2025



By Property Type

■ 9-2024 ■ 9-2025



All Properties

By Price Range	9-2024	9-2025	Change
\$150,000 and Below	4.3	6.7	+ 55.8%
\$150,001 to \$250,000	2.9	3.7	+ 27.6%
\$250,001 to \$350,000	5.2	4.9	- 5.8%
\$350,001 to \$500,000	4.2	4.2	0.0%
\$500,001 to \$750,000	3.7	4.1	+ 10.8%
\$750,001 to \$1,000,000	2.8	4.2	+ 50.0%
\$1,000,001 and Above	4.8	5.1	+ 6.2%
All Price Ranges	4.1	4.5	+ 9.8%

Single-Family Homes

	9-2024	9-2025	Change
2 Bedrooms or Less	2.6	2.8	+ 7.7%
3 Bedrooms	5.6	2.0	- 64.3%
4 Bedrooms or More	3.7	3.2	- 13.5%
	3.9	3.8	- 2.6%
	3.6	3.7	+ 2.8%
	2.7	4.4	+ 63.0%
	4.7	5.1	+ 8.5%
All Single-Family Homes	3.9	4.1	+ 5.1%

Condos

	9-2024	9-2025	Change
1 Bedroom	1.6	2.0	+ 25.0%
2 Bedrooms	1.8	4.7	+ 161.1%
3 Bedrooms	6.4	6.5	+ 1.6%
4 Bedrooms or More	5.3	6.1	+ 15.1%
	4.1	5.1	+ 24.4%
	3.1	3.4	+ 9.7%
	6.0	4.7	- 21.7%
All Condos	4.7	5.5	+ 17.0%

By Bedroom Count

	9-2024	9-2025	Change
2 Bedrooms or Less	4.2	5.3	+ 26.2%
3 Bedrooms	3.6	3.6	0.0%
4 Bedrooms or More	4.6	5.0	+ 8.7%
All Bedroom Counts	4.1	4.5	+ 9.8%

Single-Family Homes

	9-2024	9-2025	Change
2 Bedrooms or Less	3.2	3.9	+ 21.9%
3 Bedrooms	3.6	3.5	- 2.8%
4 Bedrooms or More	4.4	4.9	+ 11.4%
All Single-Family Homes	3.9	4.1	+ 5.1%

Condos

	9-2024	9-2025	Change
1 Bedroom	4.8	6.2	+ 29.2%
2 Bedrooms	3.5	4.2	+ 20.0%
3 Bedrooms	6.6	5.5	- 16.7%
All Condos	4.7	5.5	+ 17.0%