

Housing Supply Overview

A RESEARCH TOOL PROVIDED BY SOUTH CAROLINA REALTORS®



December 2025

U.S. pending home sales climbed to their highest level in nearly three years, rising 3.3% month-over-month, according to the National Association of REALTORS®. Economists polled by Reuters had forecast a 1.0% increase in contract signings. On a year-over-year basis, pending home sales advanced 2.6%, with both monthly and annual gains recorded across all four regions. For the 12-month period spanning January 2025 through December 2025, Pending Sales in the Hilton Head Association of REALTORS® region increased 5.0 percent overall. The price range with the largest pending sales gain was the \$250,001 to \$350,000 range, where sales were up 13.4 percent.

The overall Median Sales Price increased 0.6 percent to \$545,000. The property type with the largest gain was the Single-Family Homes segment, where prices rose 3.4 percent to \$599,000. The price range that tended to sell the quickest was the \$750,001 to \$1,000,000 range at 82 days. The price range that tended to sell the slowest was the \$150,000 and Below range at 110 days.

Market-wide, inventory levels rose 11.3 percent. The property type with the largest gain was the Condos segment, where the number of properties for sale increased 13.4 percent. That amounts to 3.6 months of inventory for Single-Family Homes and 4.9 months of inventory for Condos.

Quick Facts

+ 13.4%	+ 14.6%	+ 8.2%
Price Range with Strongest Sales: \$250,001 to \$350,000	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

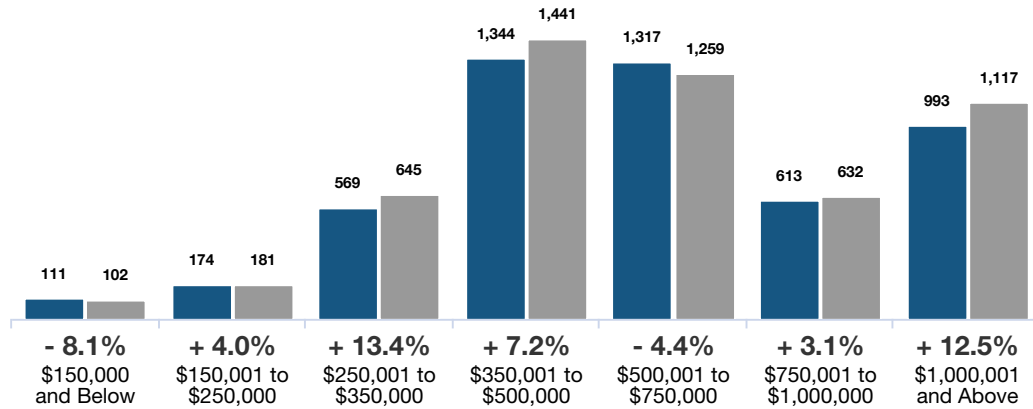
Pending Sales

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



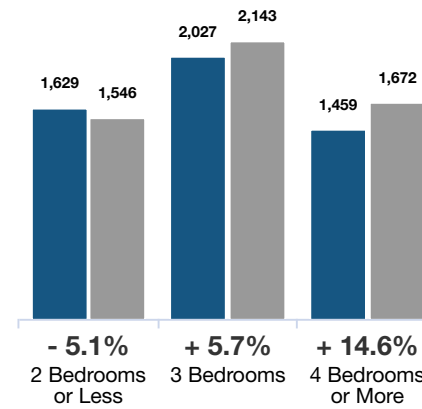
By Price Range

■ 12-2024 ■ 12-2025



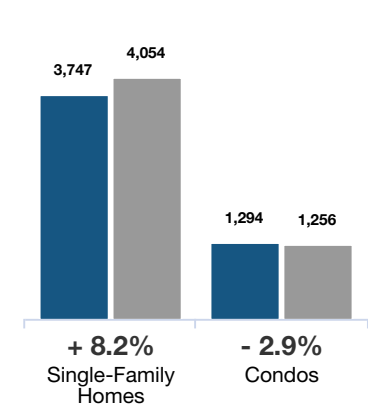
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties				Single-Family Homes				Condos			
By Price Range	12-2024	12-2025	Change	12-2024	12-2025	Change		12-2024	12-2025	Change	
\$150,000 and Below	111	102	- 8.1%	27	27	0.0%		8	15	+ 87.5%	
\$150,001 to \$250,000	174	181	+ 4.0%	49	52	+ 6.1%		124	126	+ 1.6%	
\$250,001 to \$350,000	569	645	+ 13.4%	265	338	+ 27.5%		304	307	+ 1.0%	
\$350,001 to \$500,000	1,344	1,441	+ 7.2%	1,054	1,151	+ 9.2%		289	290	+ 0.3%	
\$500,001 to \$750,000	1,317	1,259	- 4.4%	985	975	- 1.0%		330	282	- 14.5%	
\$750,001 to \$1,000,000	613	632	+ 3.1%	470	504	+ 7.2%		143	126	- 11.9%	
\$1,000,001 and Above	993	1,117	+ 12.5%	897	1,007	+ 12.3%		96	110	+ 14.6%	
All Price Ranges	5,121	5,377	+ 5.0%	3,747	4,054	+ 8.2%		1,294	1,256	- 2.9%	
By Bedroom Count	12-2024	12-2025	Change	12-2024	12-2025	Change		12-2024	12-2025	Change	
2 Bedrooms or Less	1,629	1,546	- 5.1%	735	681	- 7.3%		838	823	- 1.8%	
3 Bedrooms	2,027	2,143	+ 5.7%	1,626	1,761	+ 8.3%		381	361	- 5.2%	
4 Bedrooms or More	1,459	1,672	+ 14.6%	1,385	1,603	+ 15.7%		71	65	- 8.5%	
All Bedroom Counts	5,121	5,377	+ 5.0%	3,747	4,054	+ 8.2%		1,294	1,256	- 2.9%	

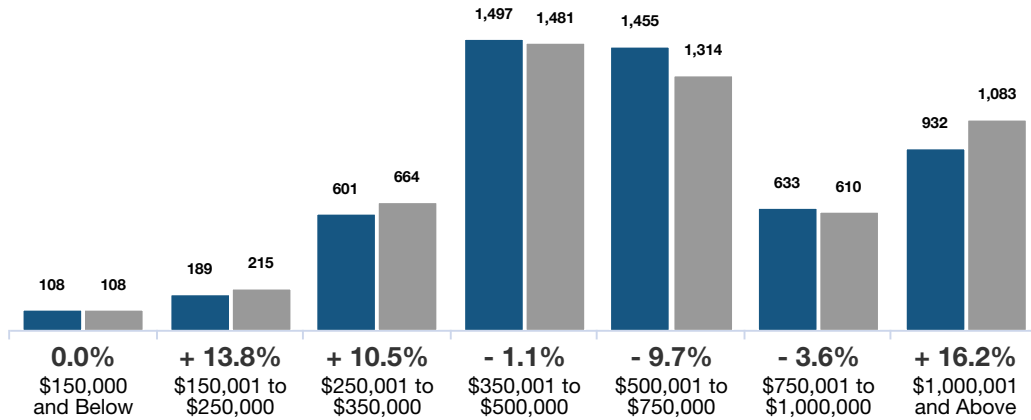
Closed Sales

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



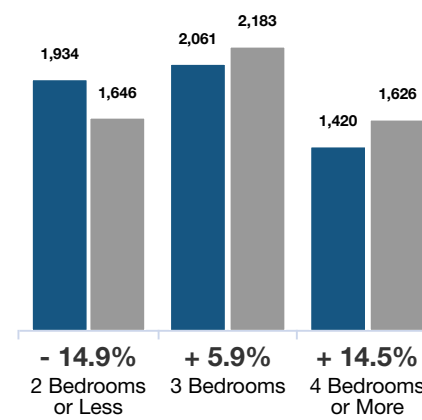
By Price Range

■ 12-2024 ■ 12-2025



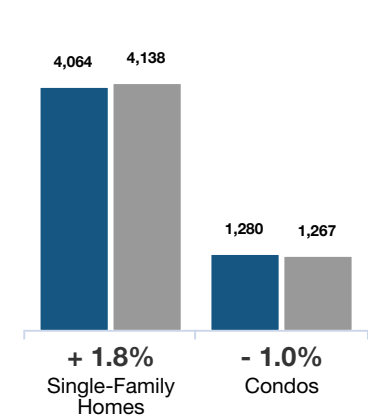
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties				Single-Family Homes			Condos		
By Price Range	12-2024	12-2025	Change	12-2024	12-2025	Change	12-2024	12-2025	Change
\$150,000 and Below	108	108	0.0%	30	29	- 3.3%	9	16	+ 77.8%
\$150,001 to \$250,000	189	215	+ 13.8%	45	56	+ 24.4%	144	157	+ 9.0%
\$250,001 to \$350,000	601	664	+ 10.5%	287	352	+ 22.6%	314	312	- 0.6%
\$350,001 to \$500,000	1,497	1,481	- 1.1%	1,222	1,210	- 1.0%	275	270	- 1.8%
\$500,001 to \$750,000	1,455	1,314	- 9.7%	1,149	1,021	- 11.1%	304	291	- 4.3%
\$750,001 to \$1,000,000	633	610	- 3.6%	490	496	+ 1.2%	143	112	- 21.7%
\$1,000,001 and Above	932	1,083	+ 16.2%	841	974	+ 15.8%	91	109	+ 19.8%
All Price Ranges	5,415	5,475	+ 1.1%	4,064	4,138	+ 1.8%	1,280	1,267	- 1.0%
By Bedroom Count	12-2024	12-2025	Change	12-2024	12-2025	Change	12-2024	12-2025	Change
2 Bedrooms or Less	1,934	1,646	- 14.9%	1,046	781	- 25.3%	835	825	- 1.2%
3 Bedrooms	2,061	2,183	+ 5.9%	1,659	1,800	+ 8.5%	387	358	- 7.5%
4 Bedrooms or More	1,420	1,626	+ 14.5%	1,359	1,549	+ 14.0%	58	73	+ 25.9%
All Bedroom Counts	5,415	5,475	+ 1.1%	4,064	4,138	+ 1.8%	1,280	1,267	- 1.0%

Days On Market Until Sale

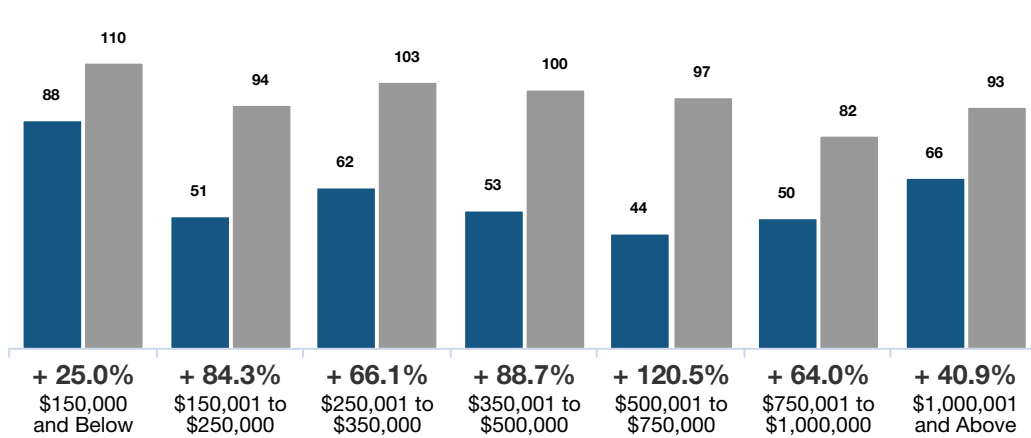
Average number of days between when a property is listed and when an offer is accepted.

Based on a rolling 12-month average.



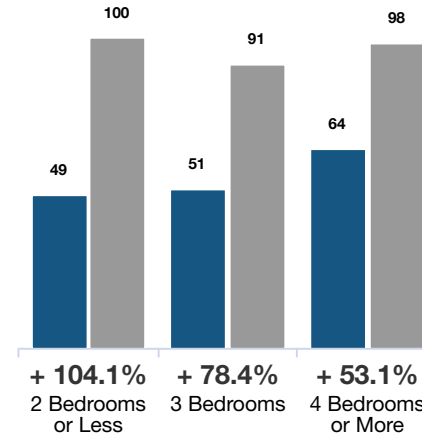
By Price Range

■ 12-2024 ■ 12-2025



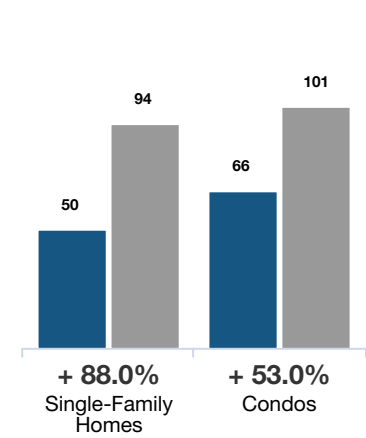
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



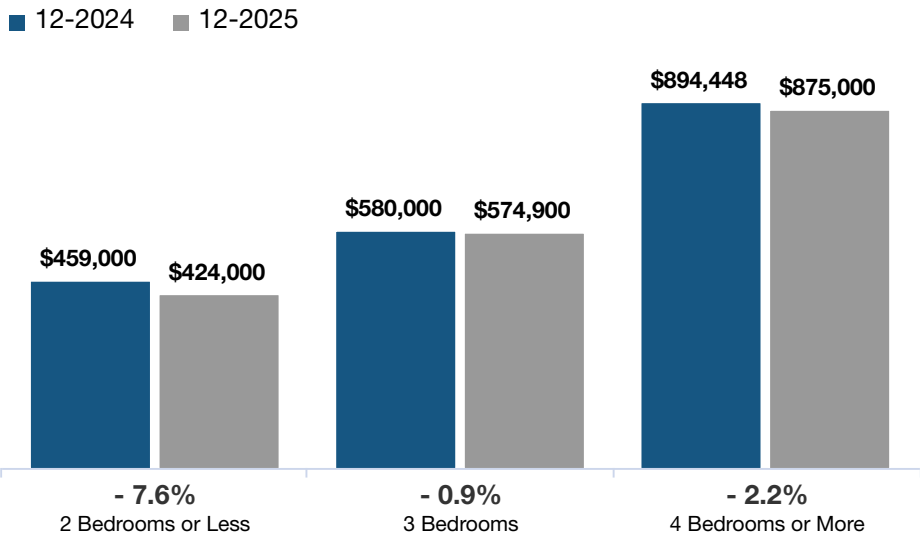
All Properties				Single-Family Homes			Condos		
By Price Range	12-2024	12-2025	Change	12-2024	12-2025	Change	12-2024	12-2025	Change
\$150,000 and Below	88	110	+ 25.0%	73	82	+ 12.3%	35	62	+ 77.1%
\$150,001 to \$250,000	51	94	+ 84.3%	48	89	+ 85.4%	52	93	+ 78.8%
\$250,001 to \$350,000	62	103	+ 66.1%	42	93	+ 121.4%	80	114	+ 42.5%
\$350,001 to \$500,000	53	100	+ 88.7%	49	97	+ 98.0%	68	113	+ 66.2%
\$500,001 to \$750,000	44	97	+ 120.5%	39	95	+ 143.6%	63	102	+ 61.9%
\$750,001 to \$1,000,000	50	82	+ 64.0%	51	82	+ 60.8%	45	80	+ 77.8%
\$1,000,001 and Above	66	93	+ 40.9%	65	95	+ 46.2%	73	79	+ 8.2%
All Price Ranges	54	96	+ 77.8%	50	94	+ 88.0%	66	101	+ 53.0%
By Bedroom Count	12-2024	12-2025	Change	12-2024	12-2025	Change	12-2024	12-2025	Change
2 Bedrooms or Less	49	100	+ 104.1%	33	89	+ 169.7%	66	107	+ 62.1%
3 Bedrooms	51	91	+ 78.4%	47	92	+ 95.7%	67	89	+ 32.8%
4 Bedrooms or More	64	98	+ 53.1%	65	98	+ 50.8%	56	94	+ 67.9%
All Bedroom Counts	54	96	+ 77.8%	50	94	+ 88.0%	66	101	+ 53.0%

Median Sales Price

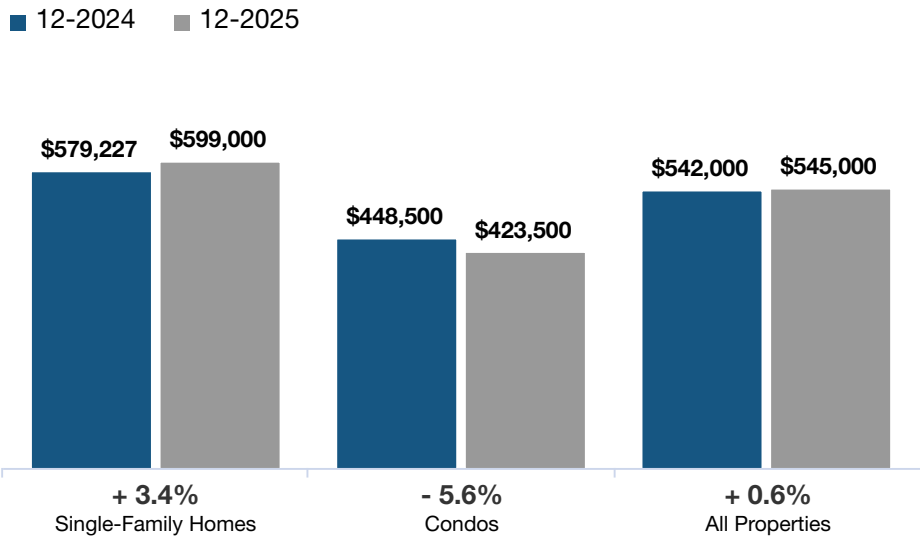
Median price point for all closed sales, not accounting for seller concessions. Based on a rolling 12-month median.



By Bedroom Count



By Property Type



All Properties			
By Bedroom Count	12-2024	12-2025	Change
2 Bedrooms or Less	\$459,000	\$424,000	- 7.6%
3 Bedrooms	\$580,000	\$574,900	- 0.9%
4 Bedrooms or More	\$894,448	\$875,000	- 2.2%
All Bedroom Counts	\$542,000	\$545,000	+ 0.6%

Single-Family Homes			Condos		
12-2024	12-2025	Change	12-2024	12-2025	Change
\$483,660	\$470,000	- 2.8%	\$385,000	\$360,000	- 6.5%
\$595,000	\$580,000	- 2.5%	\$519,000	\$552,600	+ 6.5%
\$900,000	\$893,000	- 0.8%	\$700,000	\$749,000	+ 7.0%
\$579,227	\$599,000	+ 3.4%	\$448,500	\$423,500	- 5.6%

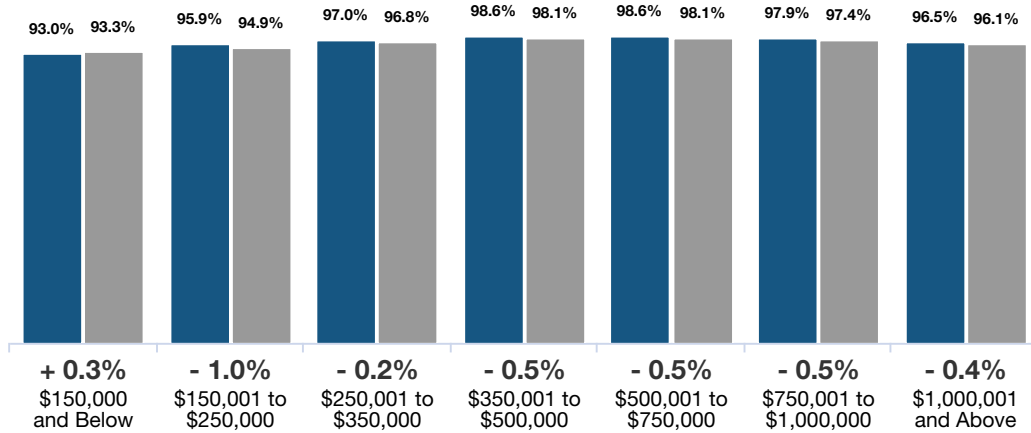
Percent of List Price Received



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.**

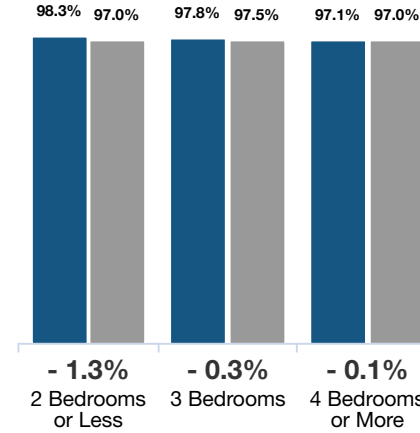
By Price Range

■ 12-2024 ■ 12-2025



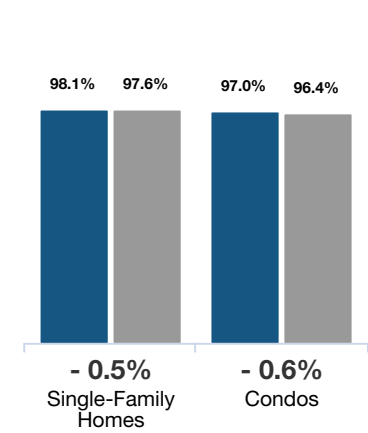
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties				Single-Family Homes			Condos		
By Price Range	12-2024	12-2025	Change	12-2024	12-2025	Change	12-2024	12-2025	Change
\$150,000 and Below	93.0%	93.3%	+ 0.3%	93.3%	100.4%	+ 7.6%	95.6%	88.1%	- 7.8%
\$150,001 to \$250,000	95.9%	94.9%	- 1.0%	96.1%	94.8%	- 1.4%	95.8%	95.0%	- 0.8%
\$250,001 to \$350,000	97.0%	96.8%	- 0.2%	97.5%	97.1%	- 0.4%	96.6%	96.4%	- 0.2%
\$350,001 to \$500,000	98.6%	98.1%	- 0.5%	99.0%	98.4%	- 0.6%	97.1%	96.7%	- 0.4%
\$500,001 to \$750,000	98.6%	98.1%	- 0.5%	99.0%	98.4%	- 0.6%	97.3%	97.0%	- 0.3%
\$750,001 to \$1,000,000	97.9%	97.4%	- 0.5%	97.9%	97.4%	- 0.5%	97.8%	97.4%	- 0.4%
\$1,000,001 and Above	96.5%	96.1%	- 0.4%	96.4%	96.0%	- 0.4%	97.8%	96.4%	- 1.4%
All Price Ranges	97.8%	97.2%	- 0.6%	98.1%	97.6%	- 0.5%	97.0%	96.4%	- 0.6%
By Bedroom Count	12-2024	12-2025	Change	12-2024	12-2025	Change	12-2024	12-2025	Change
2 Bedrooms or Less	98.3%	97.0%	- 1.3%	99.8%	98.6%	- 1.2%	96.8%	96.0%	- 0.8%
3 Bedrooms	97.8%	97.5%	- 0.3%	97.9%	97.6%	- 0.3%	97.3%	97.2%	- 0.1%
4 Bedrooms or More	97.1%	97.0%	- 0.1%	97.1%	97.0%	- 0.1%	97.3%	97.4%	+ 0.1%
All Bedroom Counts	97.8%	97.2%	- 0.6%	98.1%	97.6%	- 0.5%	97.0%	96.4%	- 0.6%

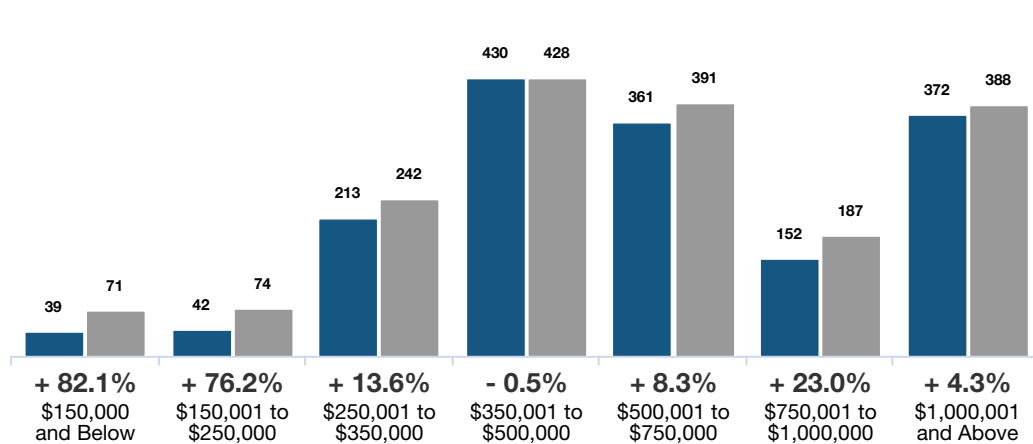
Inventory of Homes for Sale

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



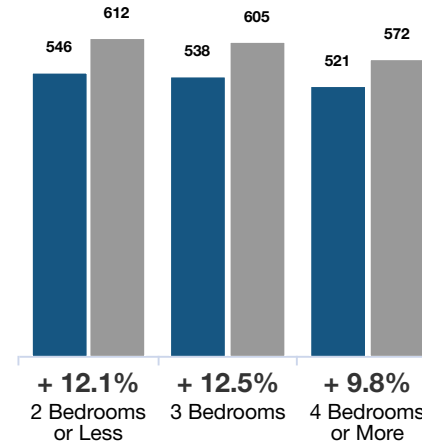
By Price Range

■ 12-2024 ■ 12-2025



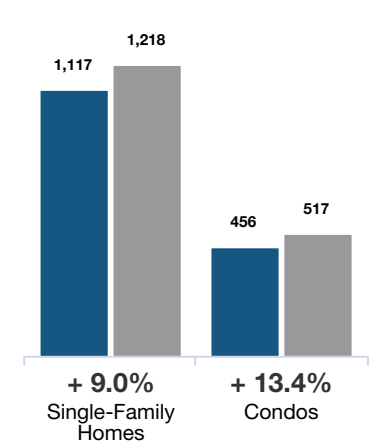
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties				Single-Family Homes			Condos		
By Price Range	12-2024	12-2025	Change	12-2024	12-2025	Change	12-2024	12-2025	Change
\$150,000 and Below	39	71	+ 82.1%	5	9	+ 80.0%	0	6	—
\$150,001 to \$250,000	42	74	+ 76.2%	17	12	- 29.4%	24	62	+ 158.3%
\$250,001 to \$350,000	213	242	+ 13.6%	76	84	+ 10.5%	137	157	+ 14.6%
\$350,001 to \$500,000	430	428	- 0.5%	295	318	+ 7.8%	135	110	- 18.5%
\$500,001 to \$750,000	361	391	+ 8.3%	257	278	+ 8.2%	102	113	+ 10.8%
\$750,001 to \$1,000,000	152	187	+ 23.0%	121	156	+ 28.9%	30	30	0.0%
\$1,000,001 and Above	372	388	+ 4.3%	344	353	+ 2.6%	28	35	+ 25.0%
All Price Ranges	1,611	1,793	+ 11.3%	1,117	1,218	+ 9.0%	456	517	+ 13.4%
By Bedroom Count	12-2024	12-2025	Change	12-2024	12-2025	Change	12-2024	12-2025	Change
2 Bedrooms or Less	546	612	+ 12.1%	190	194	+ 2.1%	324	367	+ 13.3%
3 Bedrooms	538	605	+ 12.5%	431	480	+ 11.4%	105	119	+ 13.3%
4 Bedrooms or More	521	572	+ 9.8%	495	540	+ 9.1%	22	31	+ 40.9%
All Bedroom Counts	1,611	1,793	+ 11.3%	1,117	1,218	+ 9.0%	456	517	+ 13.4%

Months Supply of Inventory

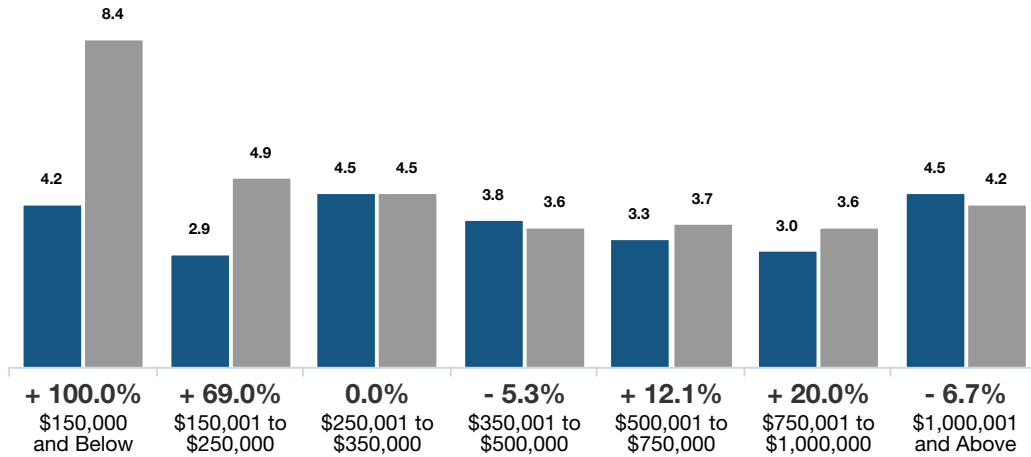
The inventory of homes for sale at the end of the most recent month, divided by the average monthly pending sales from the last 12 months.

Based on one month of activity.



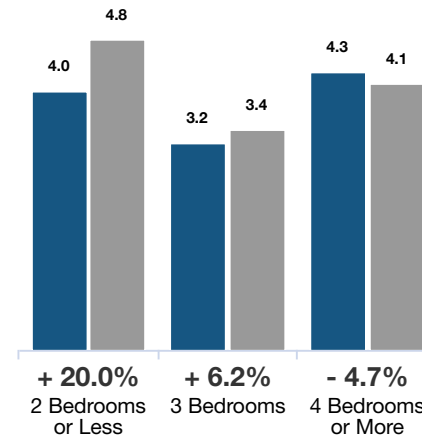
By Price Range

■ 12-2024 ■ 12-2025



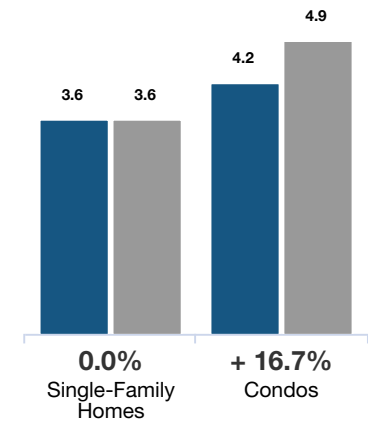
By Bedroom Count

■ 12-2024 ■ 12-2025



By Property Type

■ 12-2024 ■ 12-2025



All Properties

By Price Range	12-2024	12-2025	Change
\$150,000 and Below	4.2	8.4	+ 100.0%
\$150,001 to \$250,000	2.9	4.9	+ 69.0%
\$250,001 to \$350,000	4.5	4.5	0.0%
\$350,001 to \$500,000	3.8	3.6	- 5.3%
\$500,001 to \$750,000	3.3	3.7	+ 12.1%
\$750,001 to \$1,000,000	3.0	3.6	+ 20.0%
\$1,000,001 and Above	4.5	4.2	- 6.7%
All Price Ranges	3.8	4.0	+ 5.3%

Single-Family Homes

	12-2024	12-2025	Change
	2.2	3.7	+ 68.2%
	4.2	2.5	- 40.5%
	3.4	3.0	- 11.8%
	3.4	3.3	- 2.9%
	3.1	3.4	+ 9.7%
	3.1	3.7	+ 19.4%
	4.6	4.2	- 8.7%
All Single-Family Homes	3.6	3.6	0.0%

Condos

	12-2024	12-2025	Change
	—	2.4	—
	2.3	5.9	+ 156.5%
	5.4	6.1	+ 13.0%
	5.6	4.6	- 17.9%
	3.7	4.8	+ 29.7%
	2.5	2.9	+ 16.0%
	3.5	3.8	+ 8.6%
All Condos	4.2	4.9	+ 16.7%

By Bedroom Count	12-2024	12-2025	Change
2 Bedrooms or Less	4.0	4.8	+ 20.0%
3 Bedrooms	3.2	3.4	+ 6.2%
4 Bedrooms or More	4.3	4.1	- 4.7%
All Bedroom Counts	3.8	4.0	+ 5.3%

	12-2024	12-2025	Change
	3.1	3.4	+ 9.7%
	3.2	3.3	+ 3.1%
	4.3	4.0	- 7.0%
All Single-Family Homes	3.6	3.6	0.0%

	12-2024	12-2025	Change
	4.6	5.4	+ 17.4%
	3.3	4.0	+ 21.2%
	3.7	5.7	+ 54.1%
All Condos	4.2	4.9	+ 16.7%