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September 2025 Real Estate Market Report: Trends in Sarasota and Manatee Counties

SARASOTA, Fla. (October 23, 2025) – The REALTOR® Association of Sarasota and Manatee (RASM) has released its September 2025 real estate market report, offering a comprehensive analysis of key trends across both counties. According to data from Florida REALTORS®, the housing market across Sarasota and Manatee counties showed steady momentum in September, as closed sales rose year-over-year for both single-family homes and condos. While more buyers returned to the market compared to last fall, prices continued to moderate, and homes took longer to sell, reflecting a shift toward a more balanced environment. Inventory levels remain higher than a year ago but have eased slightly in recent months, signaling that supply is stabilizing after a year of buildup. Overall, the region's housing market is showing resilience, with increased activity and growing opportunities for buyers during more normalized conditions.

Key Trends in Sarasota/Manatee September 2025:

- **Sales Activity**: Closed sales increased year-over-year across both property types, showing renewed buyer engagement after a slower 2024. The rise in transactions may reflect improved affordability as prices moderate, lower interest rates, or pent-up demand from those who delayed purchases earlier in the year.
- **Median Sales Price:** Median prices dipped modestly year-over-year, signaling continued price normalization. Price declines were most noticeable in the condo market, particularly in higher-end segments.
- **Inventory:** Active listings increased year-over-year for both single-family and condo properties. However, inventory has trended slightly downward in recent months, suggesting some stabilization after midyear peaks.
- **Speed of Sales:** Homes and condos took longer to sell than a year ago. The slower pace suggests buyers have more time and negotiating power than in recent years.

Single-Family Homes

In September 2025, Sarasota County reported 646 single-family home sales, a 25.9 percent increase compared to last year. The median sale price fell 8.2 percent year over year to $450,000, marking the lowest median price since February 2022. Cash buyers made up 40.4 percent of all closed sales. Sellers received a median of 92.2 percent of their original list price, reflecting a continued shift toward greater buyer leverage.

Inventory levels rose 10.4 percent year-over-year to 3,137 active listings, though supply has declined month-over-month since May. The months' supply of inventory now stands at 4.8 months. Homes spent a median of 64 days to go under contract and 105 days to close, both slightly shorter than in August.

In Manatee County, there were 662 single-family home sales in September, up 24.4 percent year-over-year. The median sale price held steady at $470,000, unchanged from last year. Cash buyers represented 29.9 percent of all closed sales, while sellers received a median of 93.3 percent of their original list price, a slight decline from the previous month.

Active listings in Manatee County totaled 2,656, up 7.9 percent year-over-year, though inventory has fallen each month since March. The months supply eased to 4.2 months. The median time to contract rose to 60 days, and the median time to sale reached 109 days, both up slightly from August.

"As single-family inventory stabilizes and months supply approaches a more typical range, the market is shifting from one-sided to one where both sellers and buyers can engage productively," said Debi Reynolds, 2025 RASM President and Managing Broker at SaraBay Real Estate. "Working with a REALTOR® is critical in this environment because smart pricing and timing matter more than ever."

Townhomes and Condos

In September 2025, Sarasota County reported 230 closed sales for townhomes and condos. The median sale price declined 17.1 percent year-over-year to $315,000, with 60.0 percent of transactions paid in cash. Sellers received 88.3 percent of their original list price on average, highlighting increased flexibility in pricing.

Inventory levels grew 12.6 percent year-over-year to 1,820 active listings, though the total has trended downward since March. The months supply stood at 6.8 months. The median time to contract rose to 108 days, and the median time to sale reached 139 days, both significant increases from the previous month.

In Manatee County, 216 townhome and condo sales closed in September, a 31.7 percent increase year-over-year. The median sale price dropped 7.3 percent to $296,500, with 51.9 percent of sales paid in cash. Sellers received 89.8 percent of their original list price.

Active listings increased 5.2 percent year-over-year to 1,384, a slight uptick from August. The months supply decreased to 6.3 months, while the median time to contract rose to 92 days and the median time to sale to 130 days.

"The condo and townhome market is clearly in a correction phase," added Reynolds. "Elevated supply, longer days on market, and lower sale-to-list price ratios all point to a more buyer-friendly environment.

Summary

As Sarasota and Manatee counties move toward a more balanced housing market, buyers and sellers alike are navigating a landscape defined by opportunity and informed decision-making. With prices stabilizing and inventory adjusting to meet demand, the guidance of a trusted REALTOR® is more important than ever. REALTORS® provide expert insight into local market trends, help buyers and sellers make competitive and confident choices, and uphold the highest standards of professionalism through the REALTOR® Code of Ethics. Whether entering the market or preparing for the next move, consumers can rely on the expertise of a REALTOR® to help them reach their real estate goals with clarity and confidence.

Monthly reports are provided by Florida Realtors® with data compiled from Stellar MLS. For comprehensive statistics dating back to 2015, visit www.MyRASM.com/statistics.

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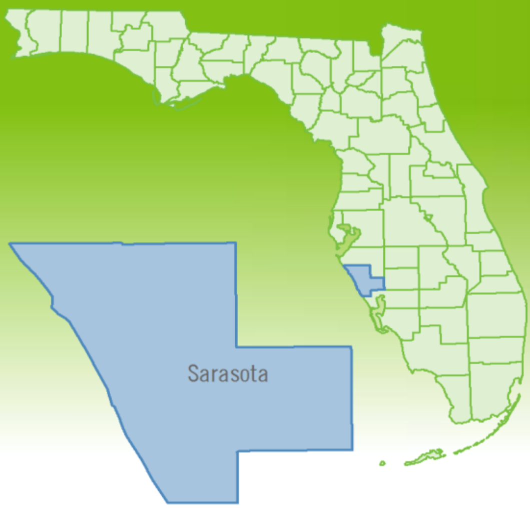
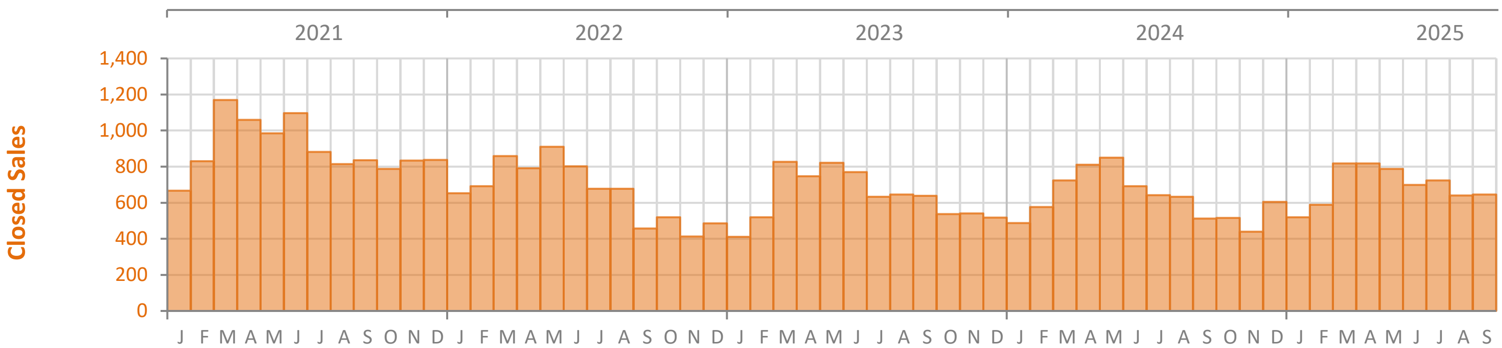
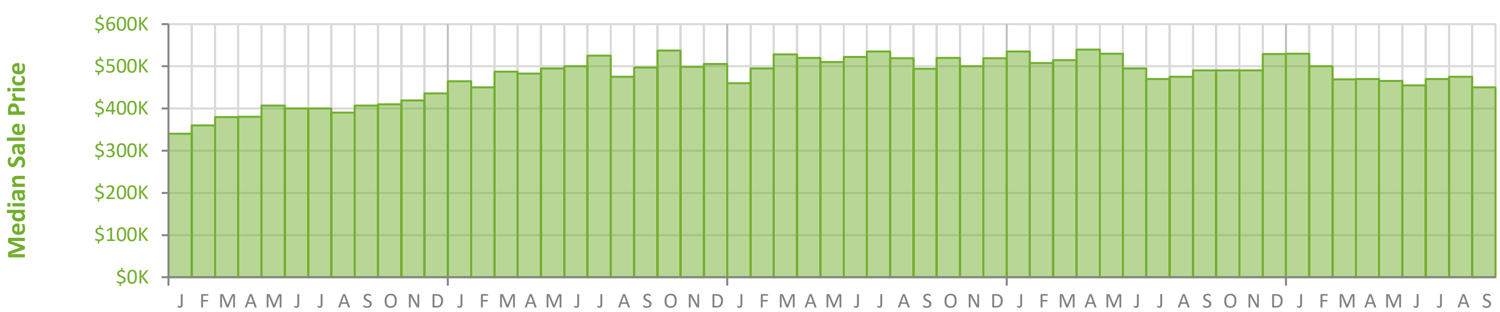
About REALTOR® Association of Sarasota and Manatee

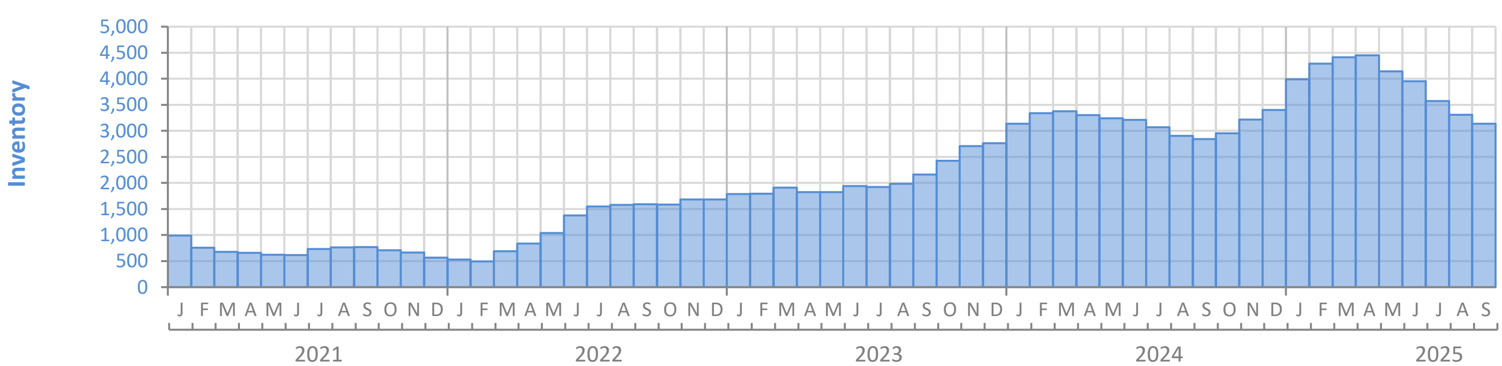
Monthly Market Summary - September 2025
Single-Family Homes
Sarasota County



	September 2025	September 2024	Percent Change Year-over-Year
Closed Sales	646	513	25.9%
Paid in Cash	261	209	24.9%
Median Sale Price	$450,000	$490,000	-8.2%
Average Sale Price	$645,845	$631,569	2.3%
Dollar Volume	$417.2 Million	$324.0 Million	28.8%
Med. Pct. of Orig. List Price Received	92.2%	94.0%	-1.9%
Median Time to Contract	64 Days	48 Days	33.3%
Median Time to Sale	105 Days	92 Days	14.1%
New Pending Sales	637	518	23.0%
New Listings	754	749	0.7%
Pending Inventory	826	758	9.0%
Inventory (Active Listings)	3,137	2,841	10.4%
Months Supply of Inventory	4.8	4.5	6.7%







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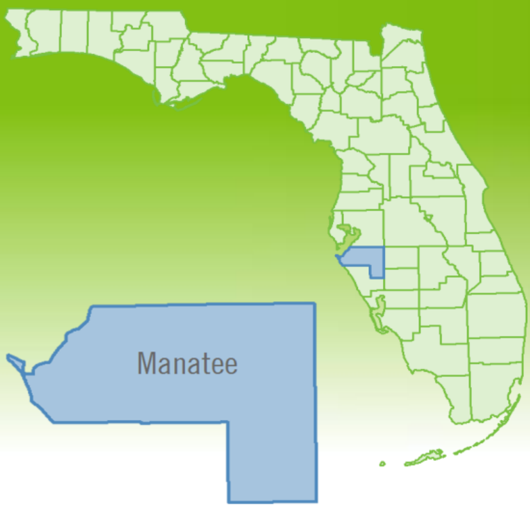
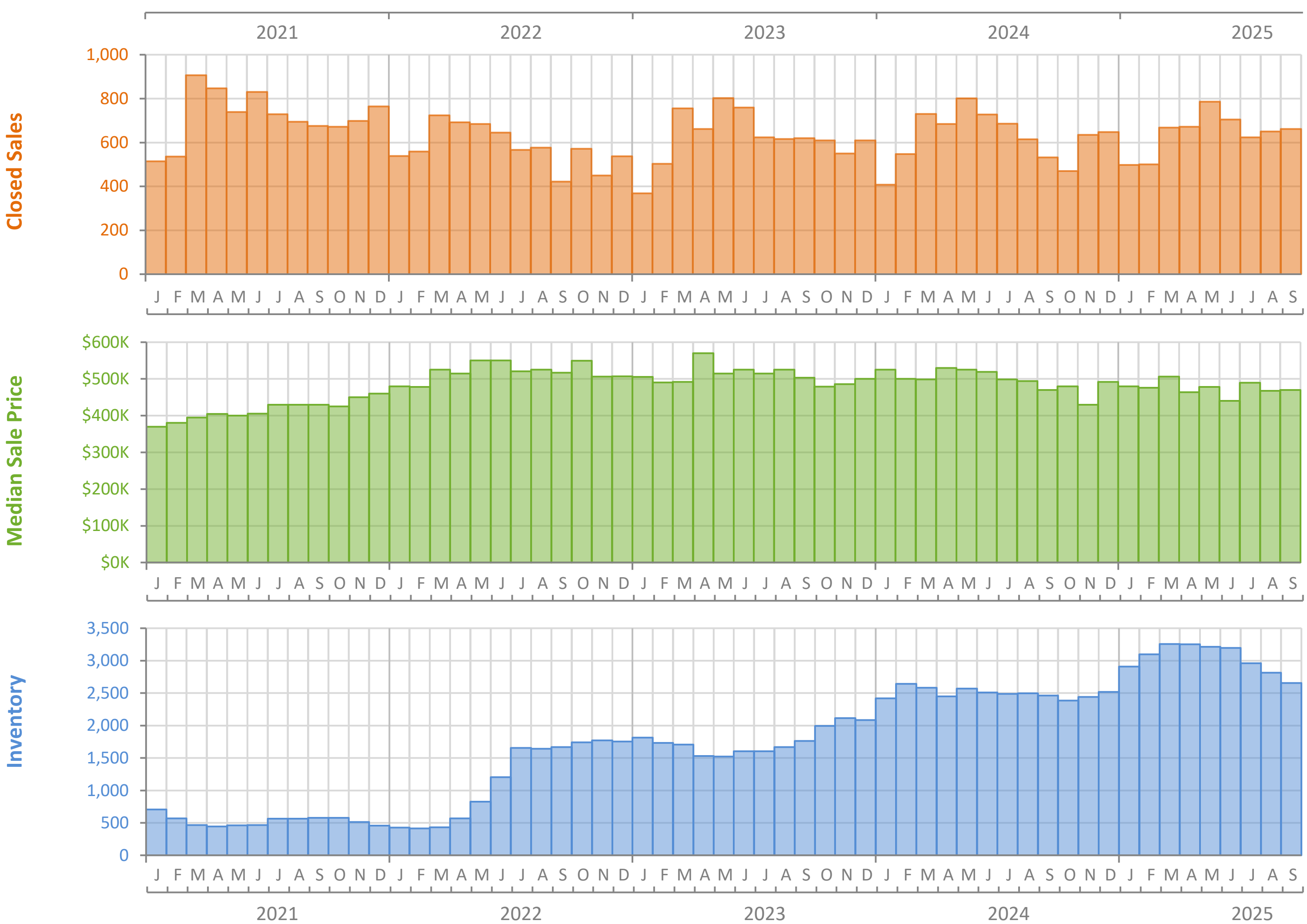
Monthly Market Summary - September 2025
Single-Family Homes
Manatee County



	September 2025	September 2024	Percent Change Year-over-Year
Closed Sales	662	532	24.4%
Paid in Cash	198	141	40.4%
Median Sale Price	$470,000	$470,000	0.0%
Average Sale Price	$593,139	$628,128	-5.6%
Dollar Volume	$392.7 Million	$334.2 Million	17.5%
Med. Pct. of Orig. List Price Received	93.3%	96.0%	-2.8%
Median Time to Contract	60 Days	47 Days	27.7%
Median Time to Sale	109 Days	99 Days	10.1%
New Pending Sales	580	529	9.6%
New Listings	681	709	-3.9%
Pending Inventory	794	810	-2.0%
Inventory (Active Listings)	2,656	2,461	7.9%
Months Supply of Inventory	4.2	3.9	7.7%



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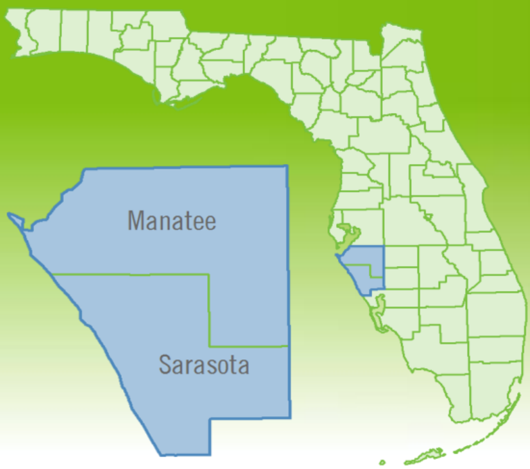
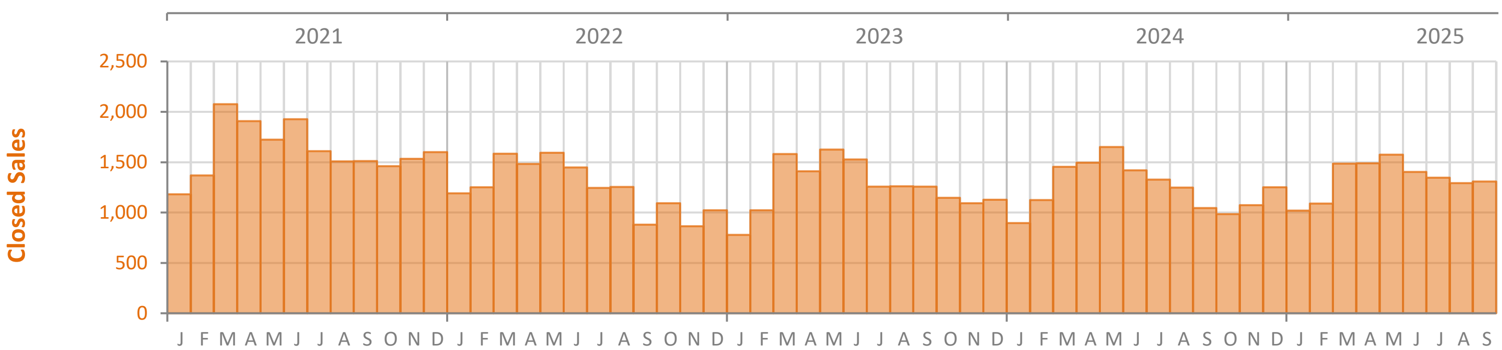
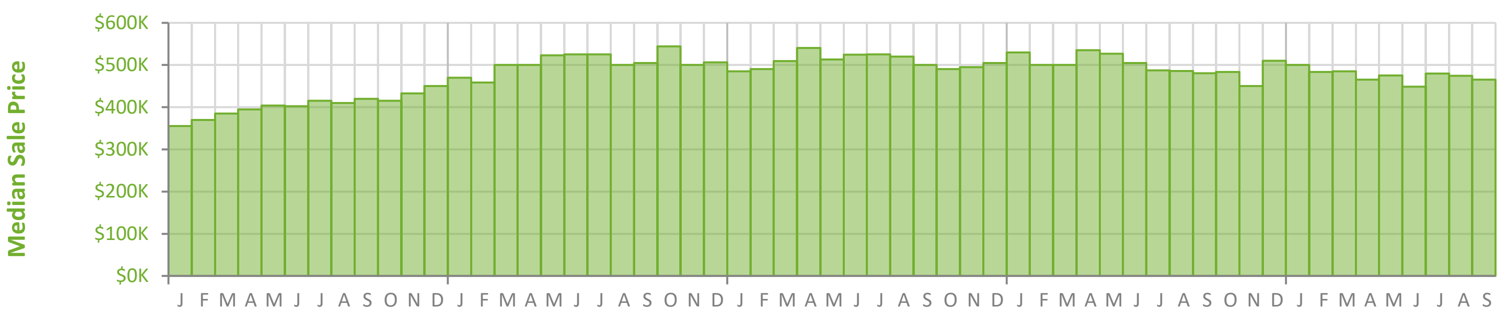
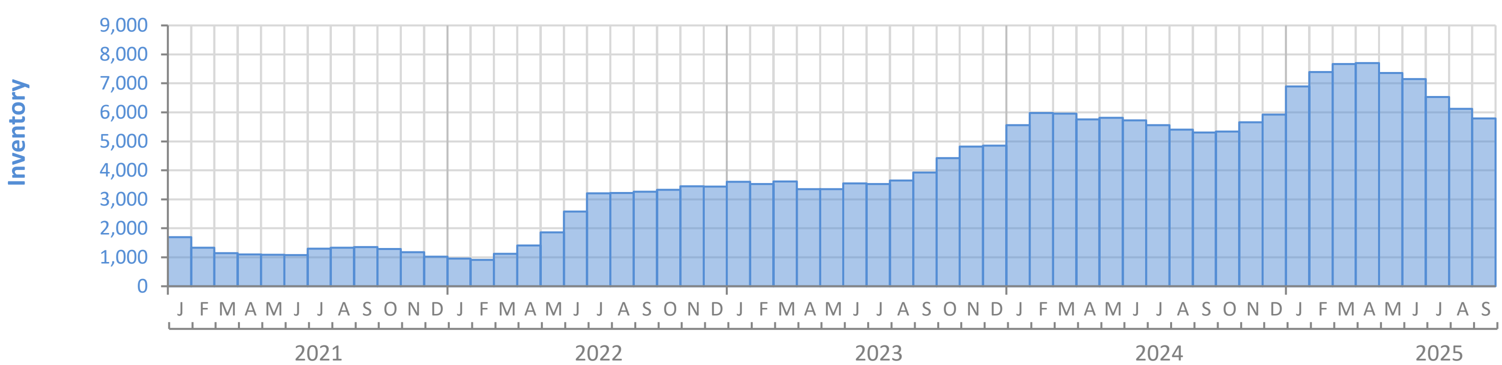
Monthly Market Summary - September 2025
Single-Family Homes
North Port-Sarasota-Bradenton MSA



	September 2025	September 2024	Percent Change Year-over-Year
Closed Sales	1,308	1,045	25.2%
Paid in Cash	459	350	31.1%
Median Sale Price	$465,000	$480,460	-3.2%
Average Sale Price	$619,149	$629,818	-1.7%
Dollar Volume	$809.8 Million	$658.2 Million	23.0%
Med. Pct. of Orig. List Price Received	92.8%	95.3%	-2.6%
Median Time to Contract	62 Days	47 Days	31.9%
Median Time to Sale	107 Days	95 Days	12.6%
New Pending Sales	1,217	1,047	16.2%
New Listings	1,435	1,458	-1.6%
Pending Inventory	1,620	1,568	3.3%
Inventory (Active Listings)	5,793	5,302	9.3%
Months Supply of Inventory	4.5	4.2	7.1%







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Monthly Market Summary - September 2025
Townhouses and Condos
Sarasota County

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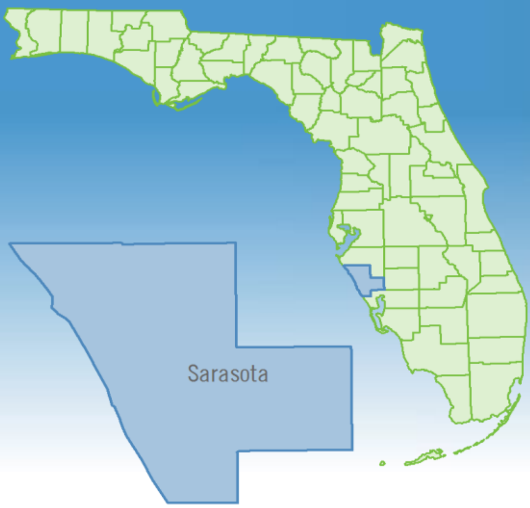
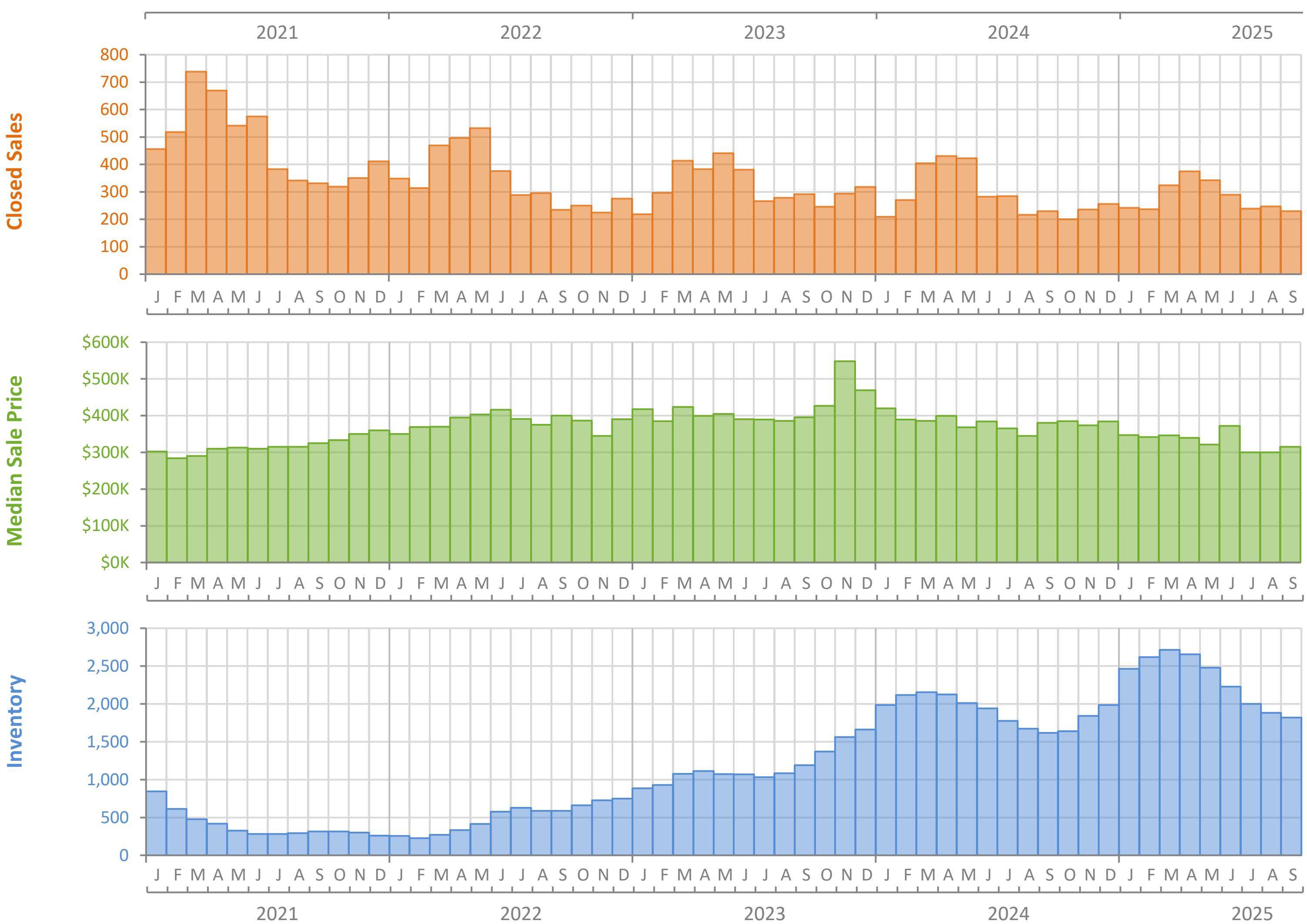


	September 2025	September 2024	Percent Change Year-over-Year
Closed Sales	230	230	0.0%
Paid in Cash	138	137	0.7%
Median Sale Price	$315,000	$380,000	-17.1%
Average Sale Price	$419,617	$1,167,673	-64.1%
Dollar Volume	$96.5 Million	$268.6 Million	-64.1%
Med. Pct. of Orig. List Price Received	88.3%	93.5%	-5.6%
Median Time to Contract	108 Days	57 Days	89.5%
Median Time to Sale	139 Days	108 Days	28.7%
New Pending Sales	244	229	6.6%
New Listings	338	366	-7.7%
Pending Inventory	476	474	0.4%
Inventory (Active Listings)	1,820	1,617	12.6%
Months Supply of Inventory	6.8	5.4	25.9%



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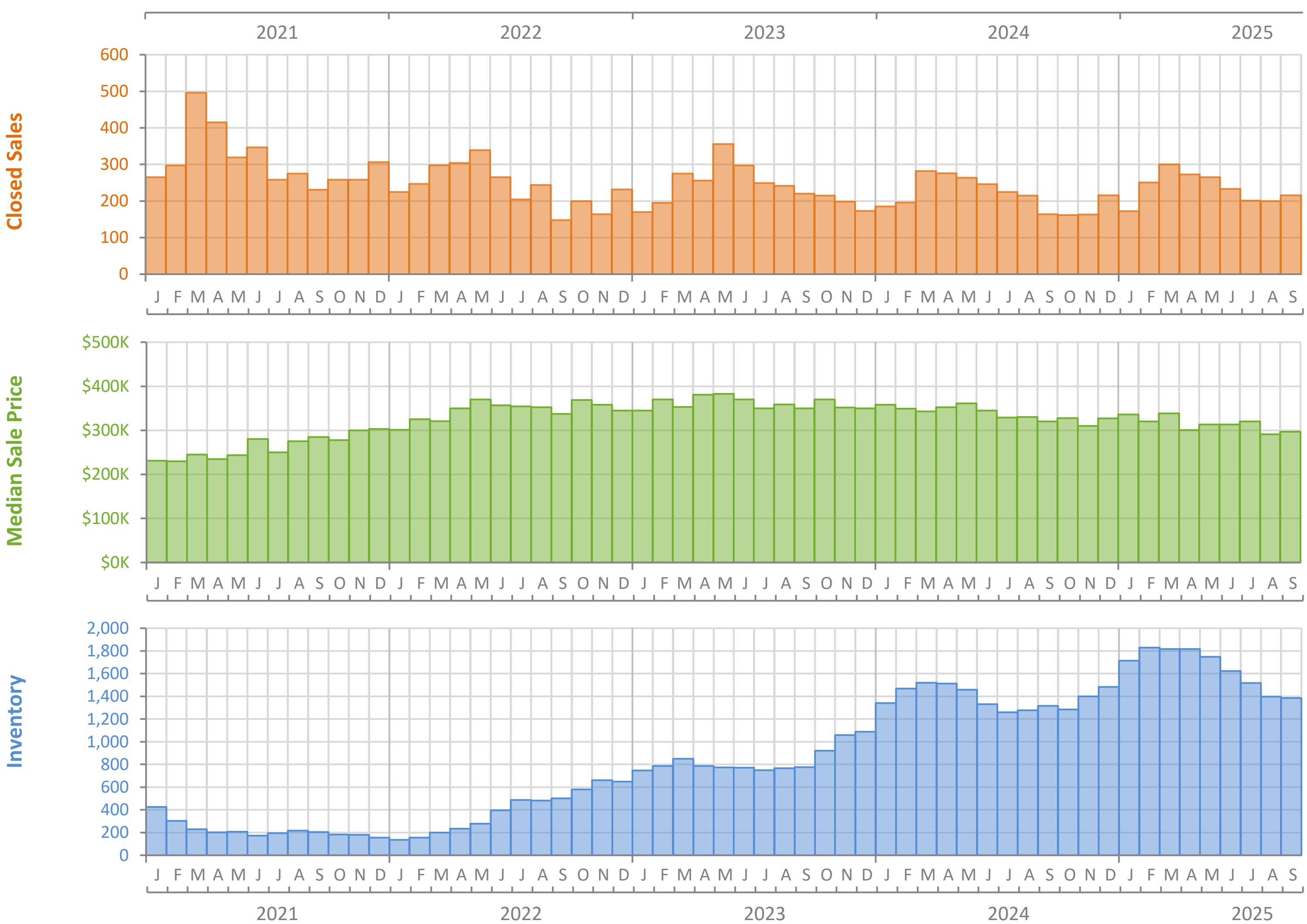
Monthly Market Summary - September 2025
Townhouses and Condos
Manatee County

	September 2025	September 2024	Percent Change Year-over-Year
Closed Sales	216	164	31.7%
Paid in Cash	112	72	55.6%
Median Sale Price	$296,500	$319,990	-7.3%
Average Sale Price	$306,864	$351,505	-12.7%
Dollar Volume	$66.3 Million	$57.6 Million	15.0%
Med. Pct. of Orig. List Price Received	89.8%	93.6%	-4.1%
Median Time to Contract	92 Days	73 Days	26.0%
Median Time to Sale	130 Days	125 Days	4.0%
New Pending Sales	167	161	3.7%
New Listings	264	323	-18.3%
Pending Inventory	210	259	-18.9%
Inventory (Active Listings)	1,384	1,316	5.2%
Months Supply of Inventory	6.3	6.0	5.0%



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Monthly Market Summary - September 2025
Townhouses and Condos
North Port-Sarasota-Bradenton MSA

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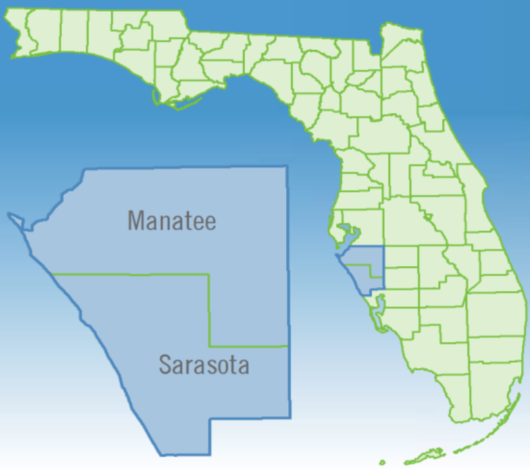
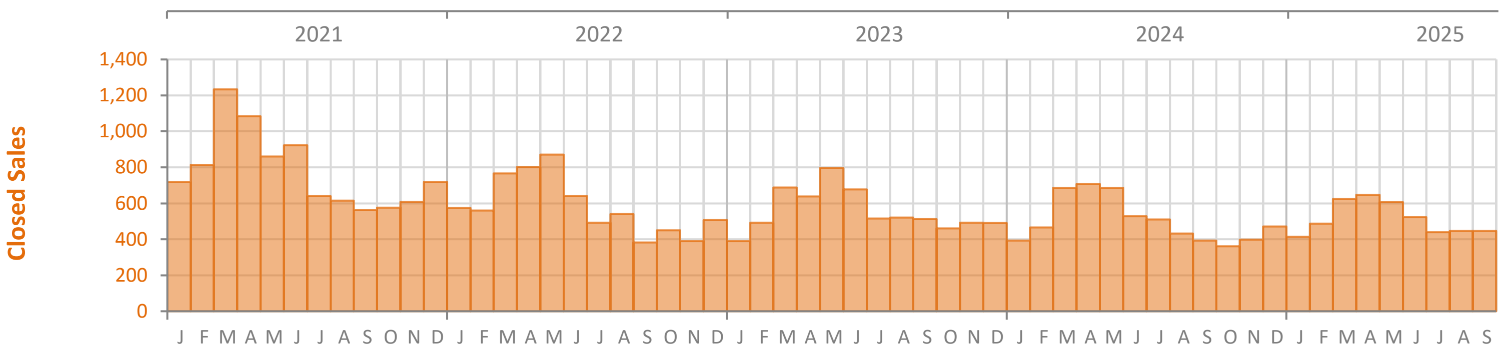
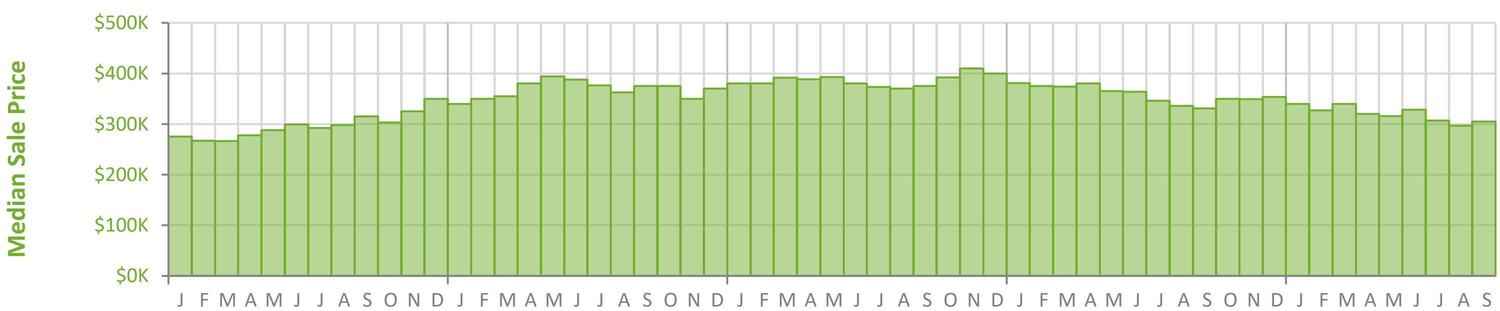
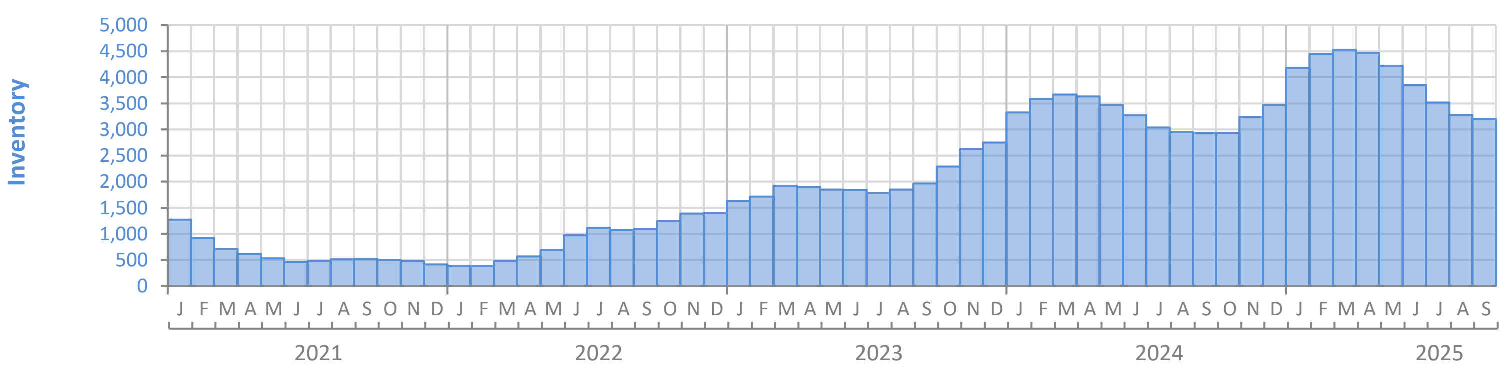


	September 2025	September 2024	Percent Change Year-over-Year
Closed Sales	446	394	13.2%
Paid in Cash	250	209	19.6%
Median Sale Price	$305,000	$331,000	-7.9%
Average Sale Price	$364,887	$827,948	-55.9%
Dollar Volume	$162.7 Million	$326.2 Million	-50.1%
Med. Pct. of Orig. List Price Received	88.6%	93.6%	-5.3%
Median Time to Contract	97 Days	65 Days	49.2%
Median Time to Sale	132 Days	116 Days	13.8%
New Pending Sales	411	390	5.4%
New Listings	602	689	-12.6%
Pending Inventory	686	733	-6.4%
Inventory (Active Listings)	3,204	2,933	9.2%
Months Supply of Inventory	6.5	5.6	16.1%







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Sarasota and Manatee Counties

September 2025

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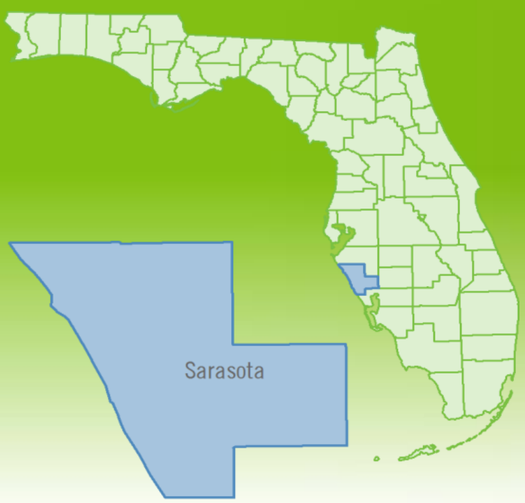
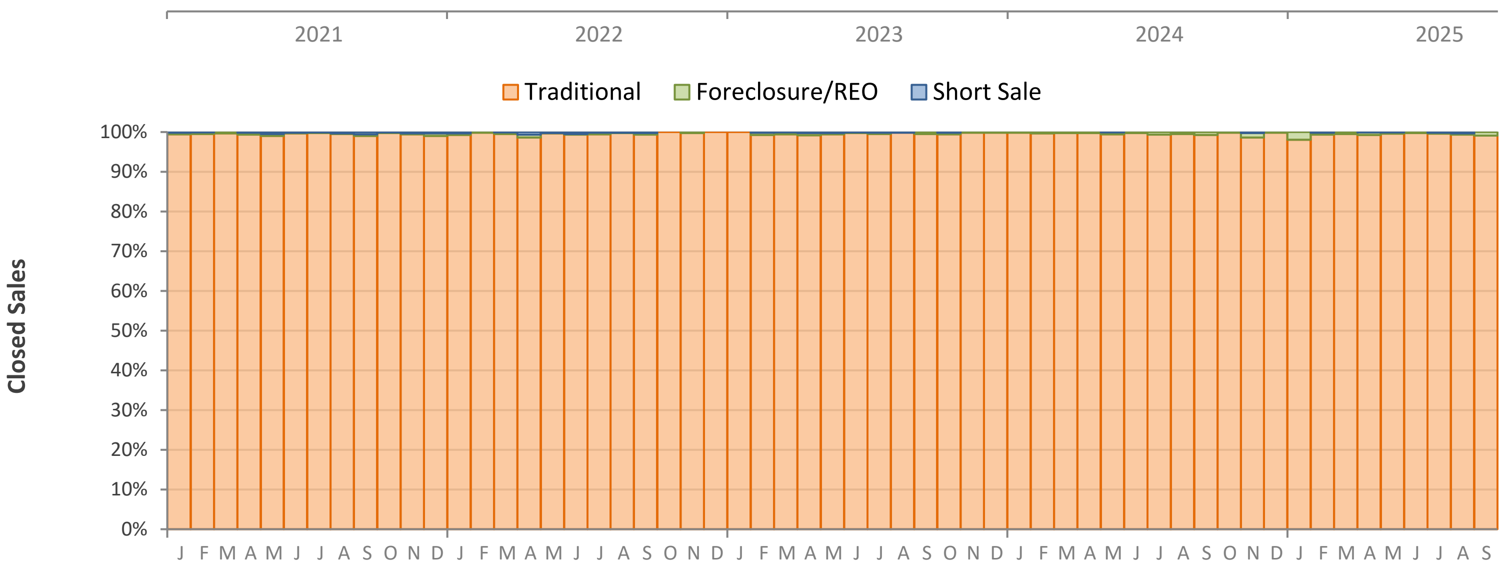
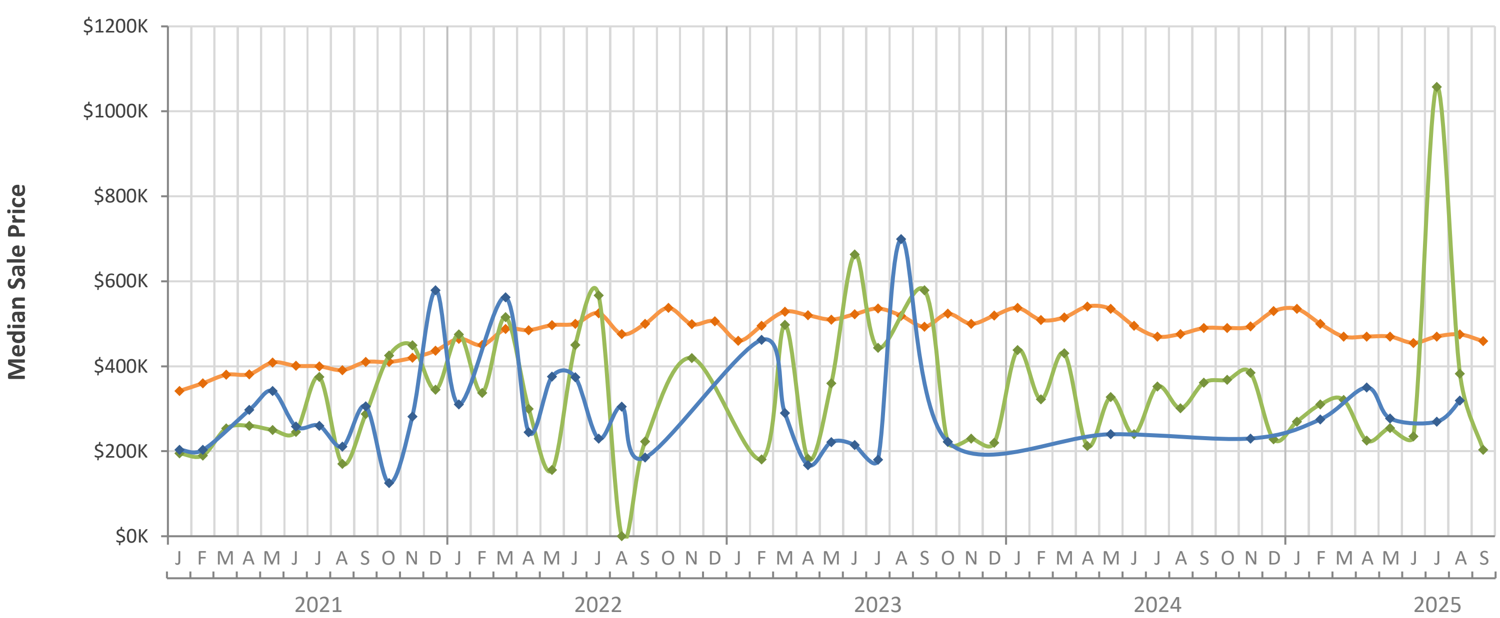
Monthly Distressed Market - September 2025
Single-Family Homes
Sarasota County



		September 2025	September 2024	Percent Change Year-over-Year
Traditional	Closed Sales	640	509	25.7%
	Median Sale Price	$459,000	$490,000	-6.3%
Foreclosure/REO	Closed Sales	6	4	50.0%
	Median Sale Price	$203,175	$361,450	-43.8%
Short Sale	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A





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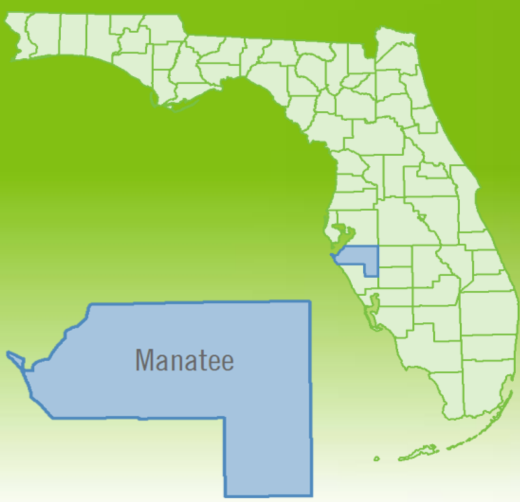
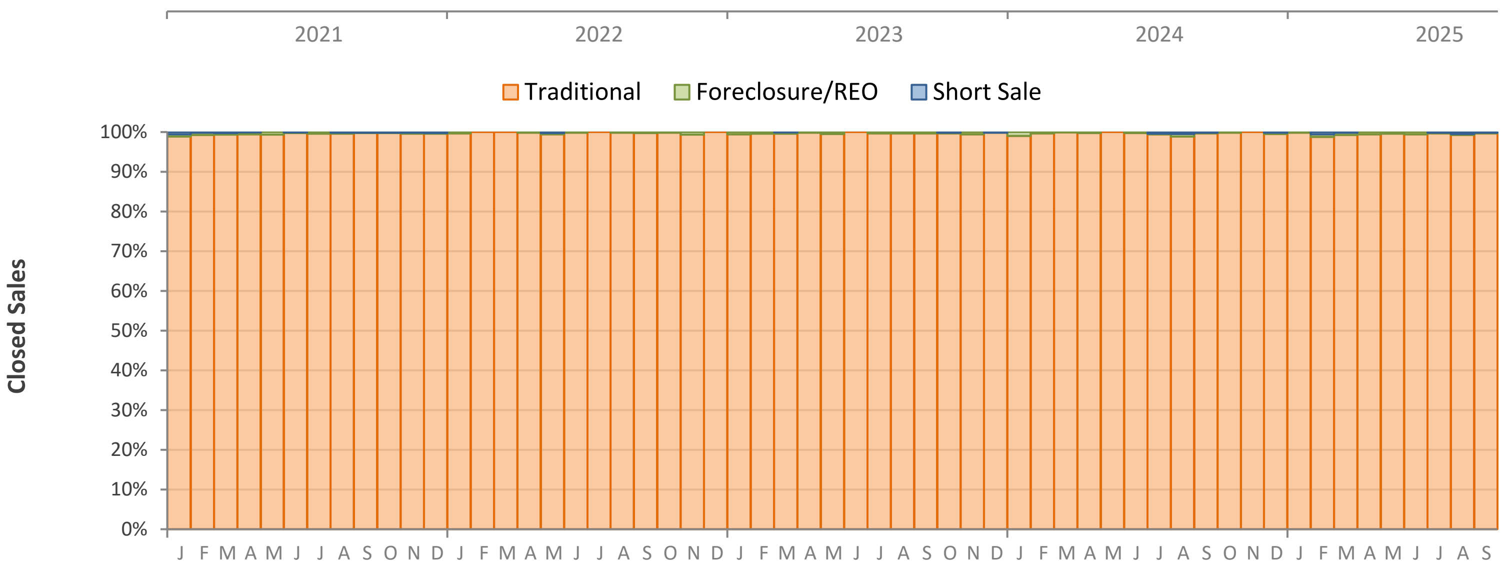
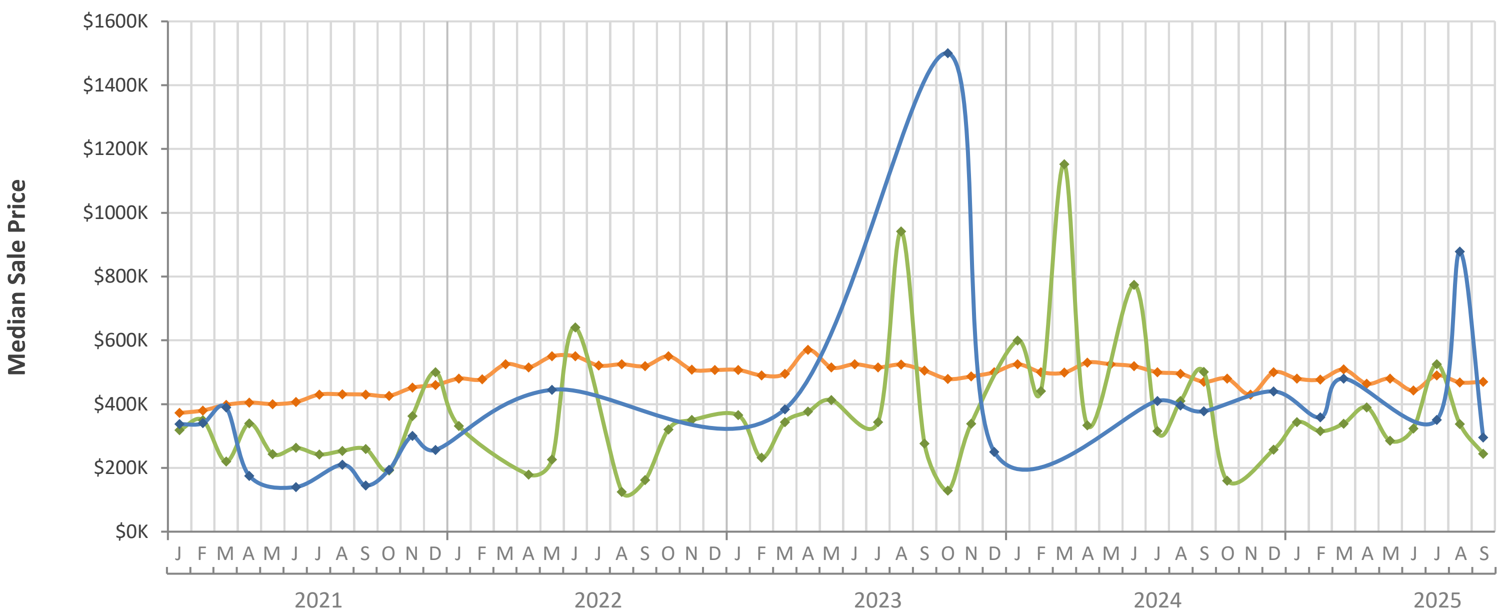
Monthly Distressed Market - September 2025
Single-Family Homes
Manatee County



		September 2025	September 2024	Percent Change Year-over-Year
Traditional	Closed Sales	660	530	24.5%
	Median Sale Price	$470,000	$470,000	0.0%
Foreclosure/REO	Closed Sales	1	1	0.0%
	Median Sale Price	$244,176	$500,850	-51.2%
Short Sale	Closed Sales	1	1	0.0%
	Median Sale Price	$295,000	$377,500	-21.9%





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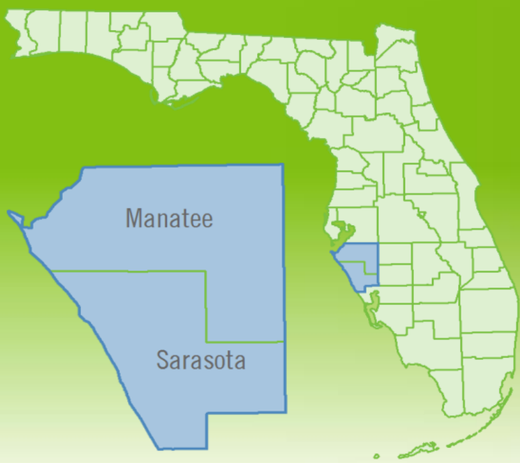
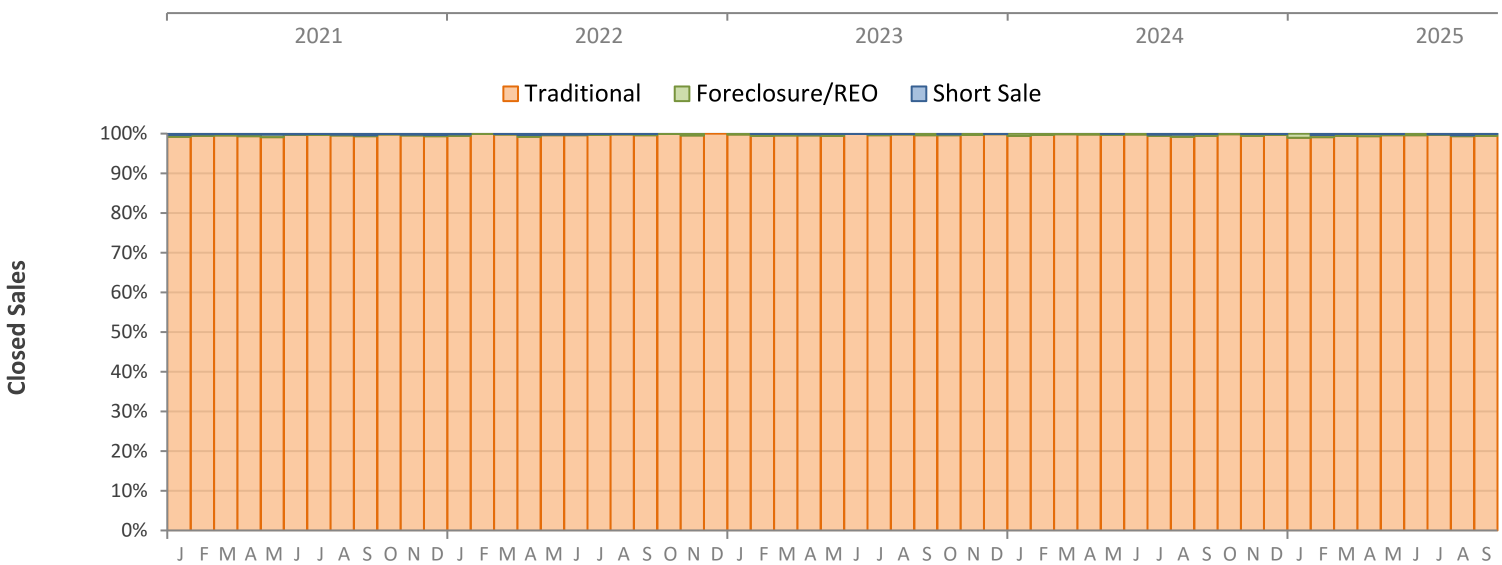
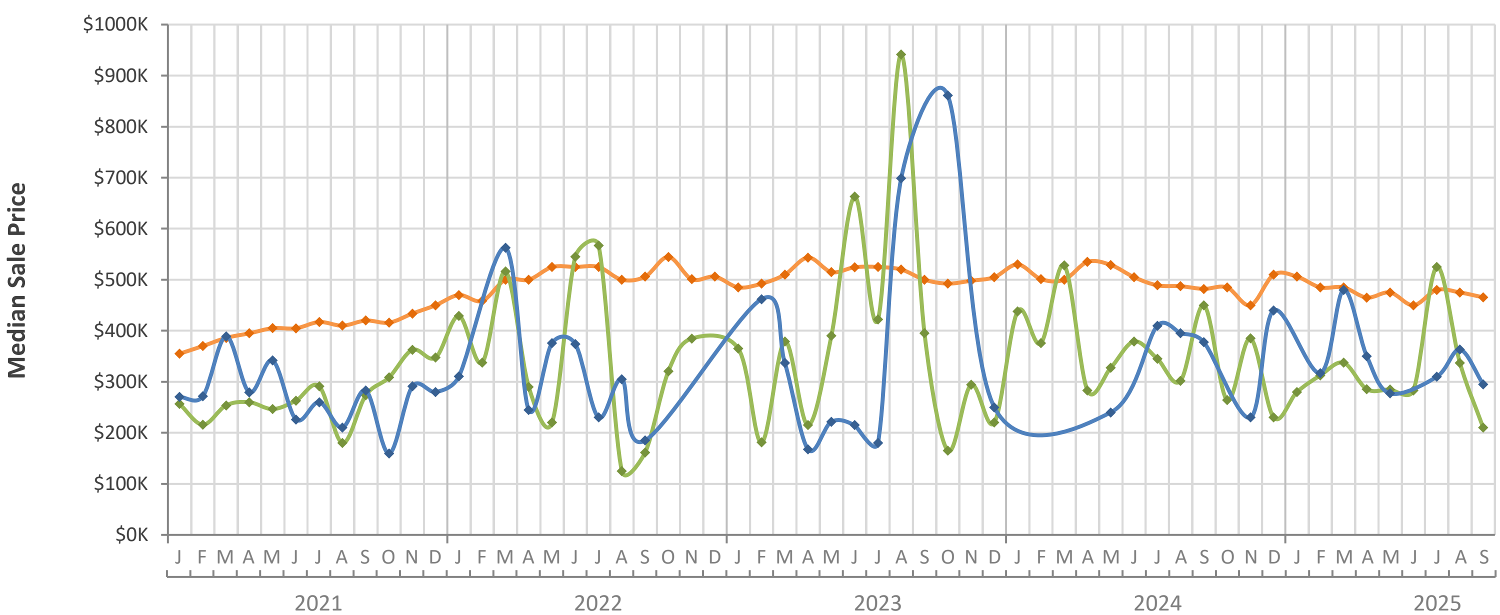
Monthly Distressed Market - September 2025
Single-Family Homes
North Port-Sarasota-Bradenton MSA



		September 2025	September 2024	Percent Change Year-over-Year
Traditional	Closed Sales	1,300	1,039	25.1%
	Median Sale Price	$465,500	$482,000	-3.4%
Foreclosure/REO	Closed Sales	7	5	40.0%
	Median Sale Price	$210,000	$449,900	-53.3%
Short Sale	Closed Sales	1	1	0.0%
	Median Sale Price	$295,000	$377,500	-21.9%





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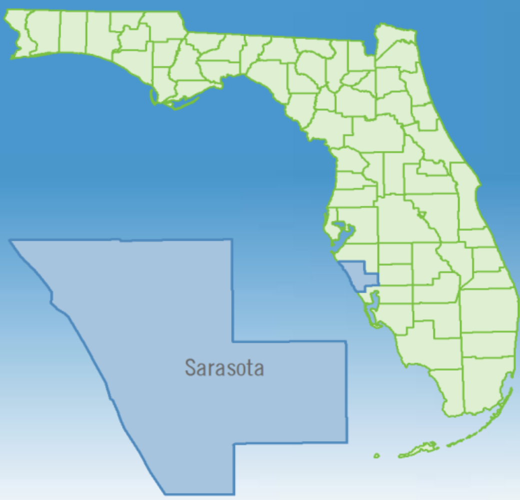
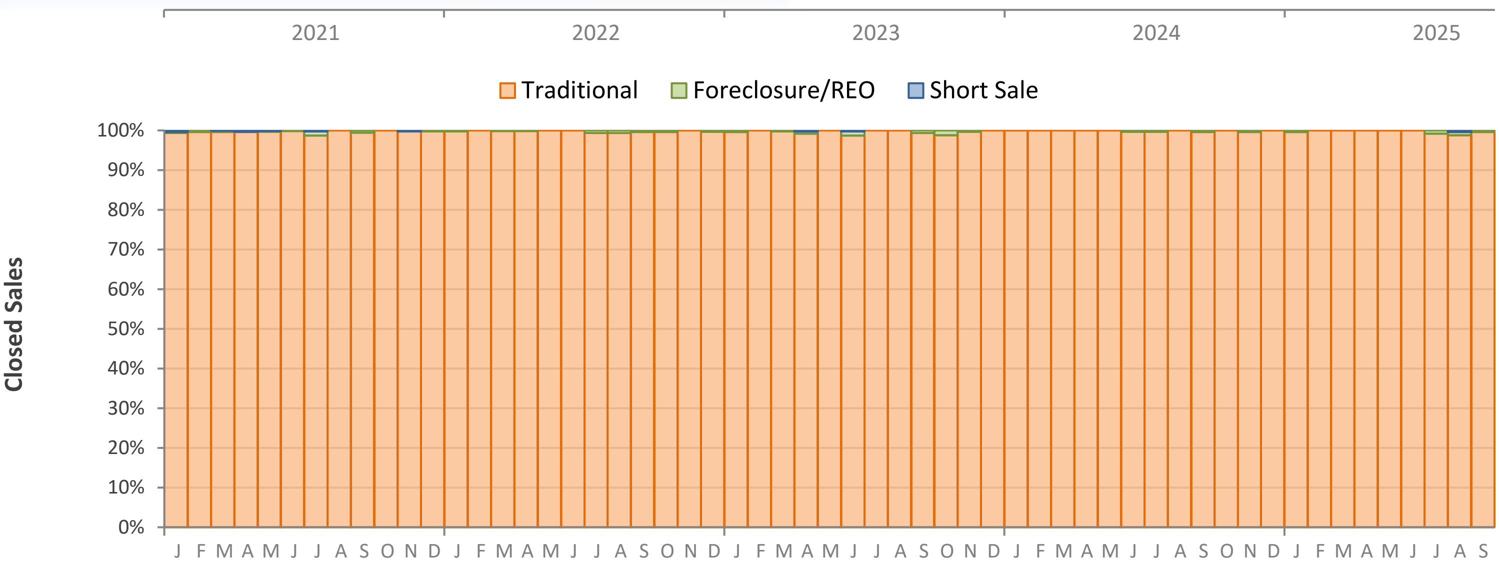
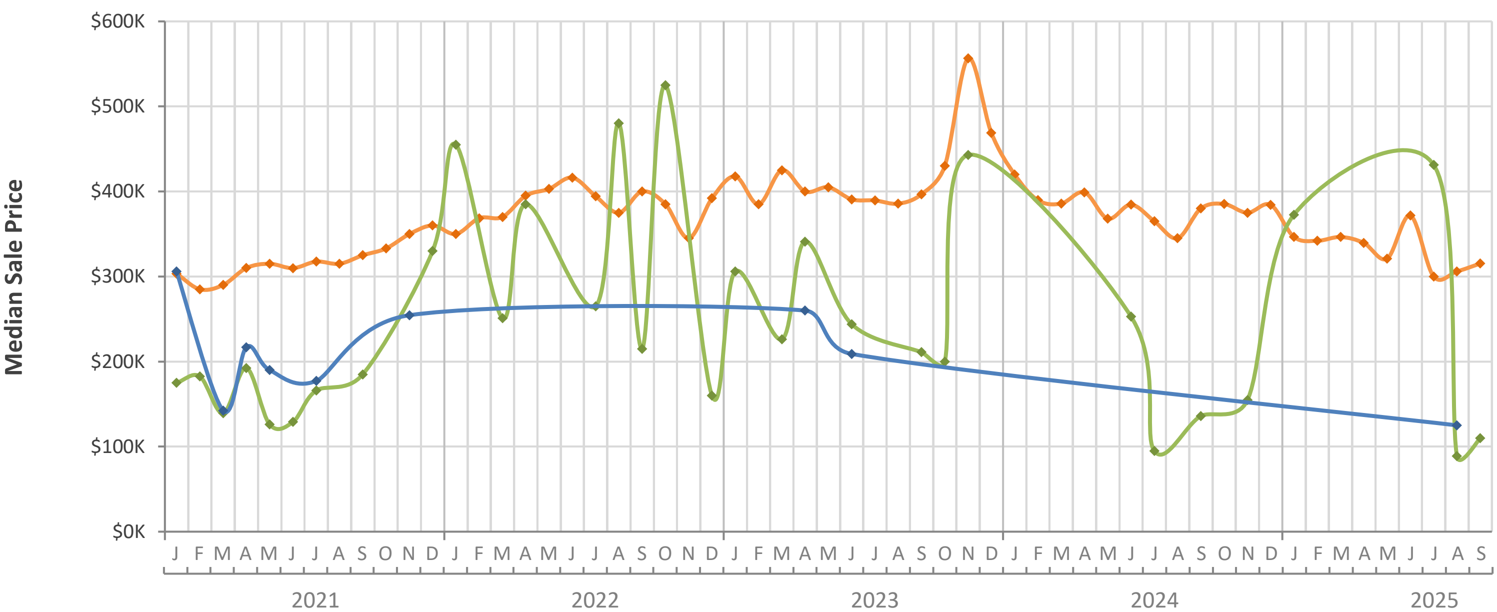
Townhouses and Condos
Sarasota County



		September 2025	September 2024	Percent Change Year-over-Year
Traditional	Closed Sales	229	229	0.0%
	Median Sale Price	$315,250	$380,000	-17.0%
Foreclosure/REO	Closed Sales	1	1	0.0%
	Median Sale Price	$110,000	$136,000	-19.1%
Short Sale	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A





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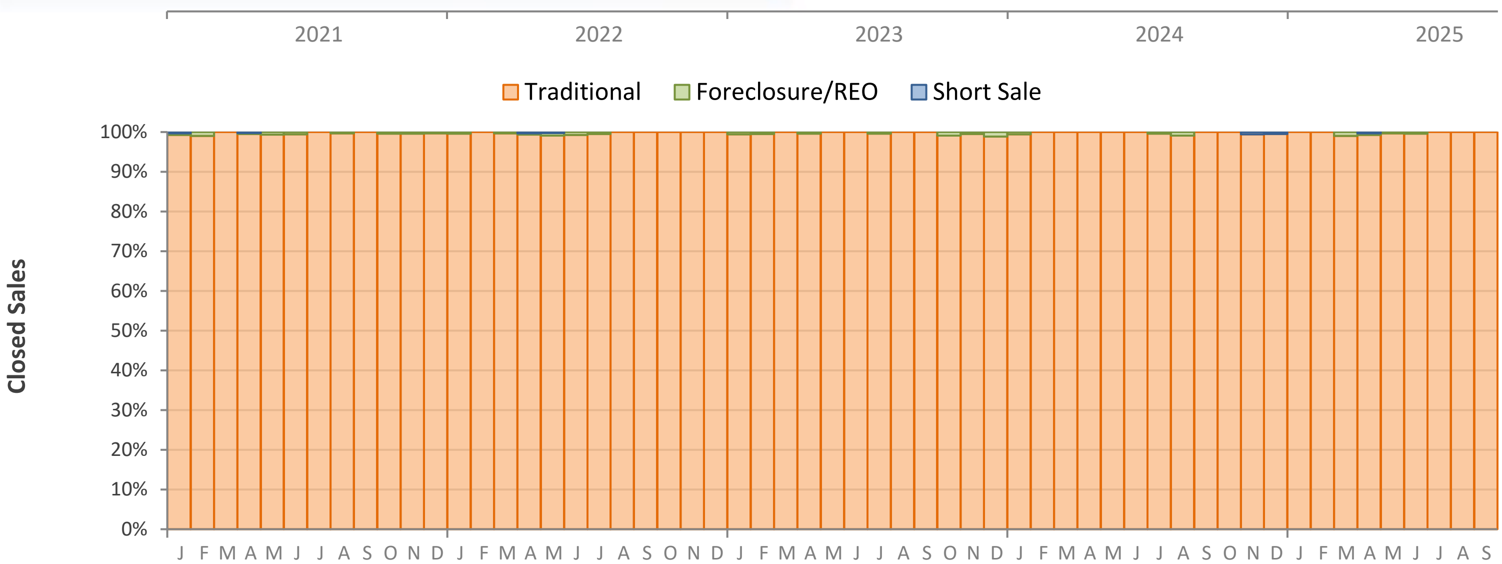
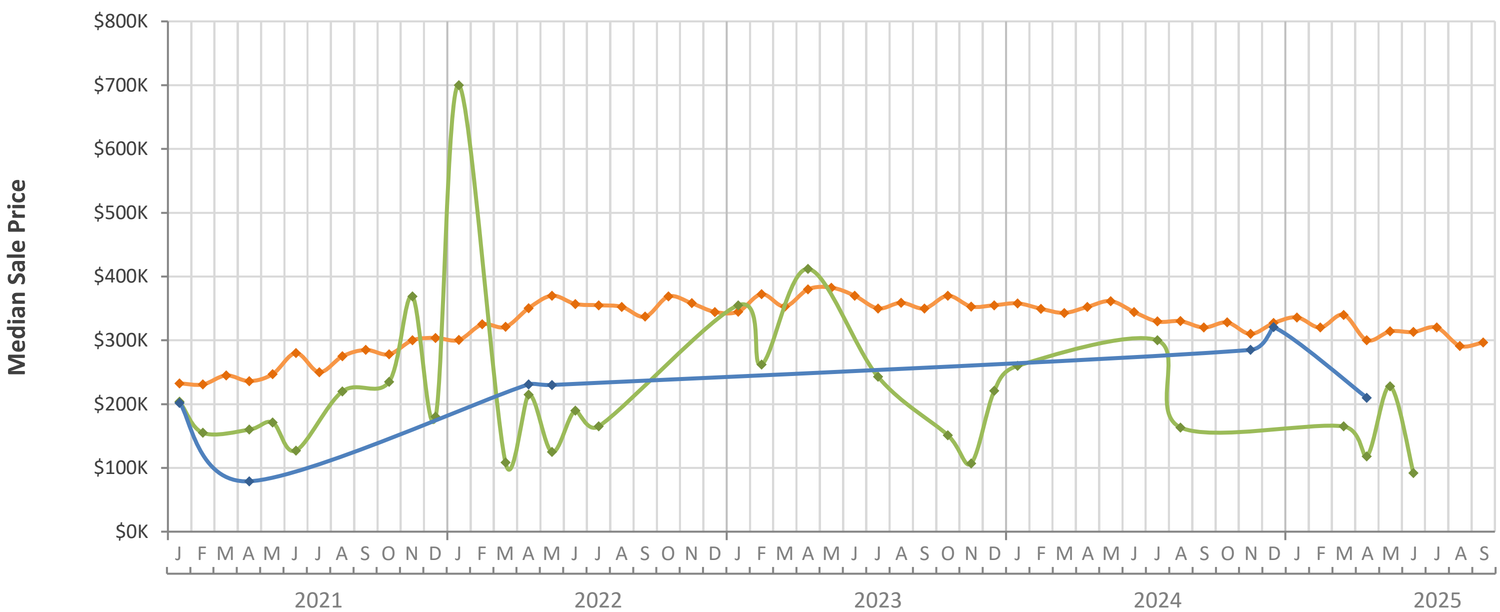
Foreclosure/REO	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A
Short Sale	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A





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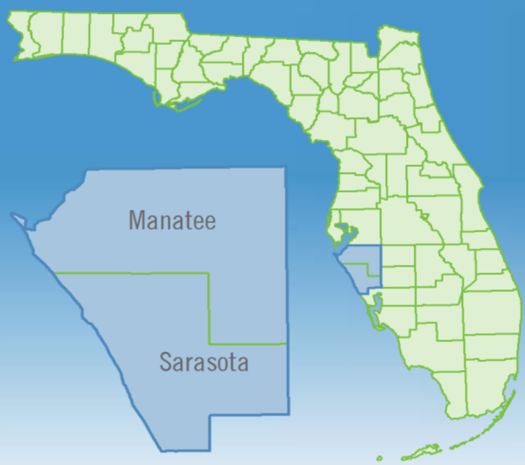
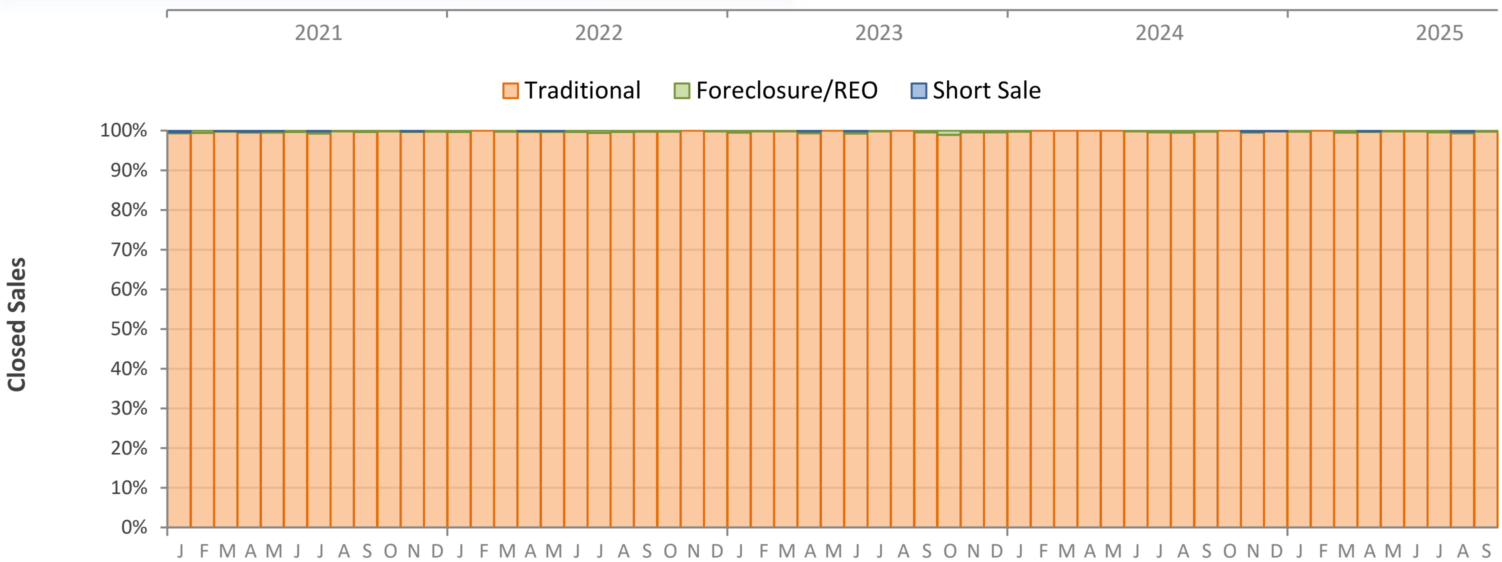
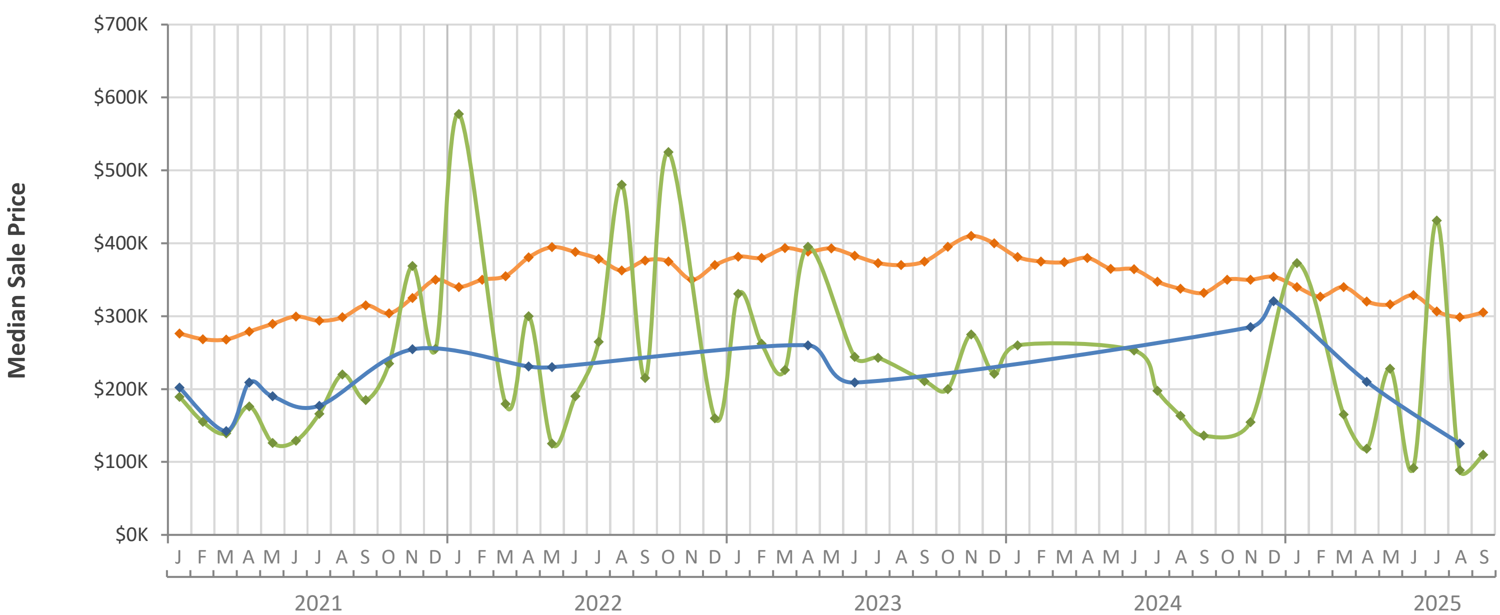
Townhouses and Condos
North Port-Sarasota-Bradenton MSA



		September 2025	September 2024	Percent Change Year-over-Year
Traditional	Closed Sales	445	393	13.2%
	Median Sale Price	$305,000	$332,000	-8.1%
Foreclosure/REO	Closed Sales	1	1	0.0%
	Median Sale Price	$110,000	$136,000	-19.1%
Short Sale	Closed Sales	0	0	N/A
	Median Sale Price	(No Sales)	(No Sales)	N/A





Produced by Florida REALTORS® with data provided by Florida's multiple listing services. Statistics for each month compiled from MLS feeds on the 15th day of the following month.
Data released on Thursday, October 23, 2025. Next data release is Thursday, November 20, 2025.