TRENDS

REAL ESTATE INSIGHTS ALONG FLORIDA'S EAST COAST

2025 ANNUAL MARKET REPORT

ONE | Sotheby's INTERNATIONAL REALTY

DELIVERING EARLY 2026

Limited Residences Remaining

With limited inventory remaining, The Village at Coral Gables is nearing completion. This exclusive collection of just 48 residences offers an extraordinary blend of timeless design, refined community living, and unmatched convenience – all nestled in the heart of Coral Gables.

Discover a curated collection of Townhomes, Lofts, Condominium Residences, and Villas, each thoughtfully designed to capture the elegance of classic European architecture.

Priced From $2.5M

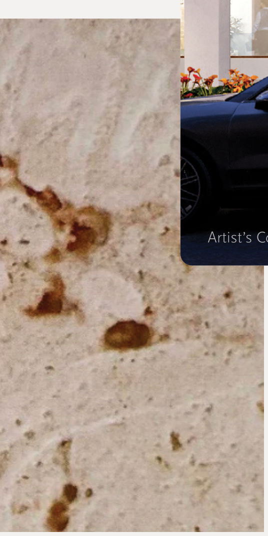
TheVillageAtCoralGables.com

@THEVILLAGEATCORALGABLES

Visit Our Sales Gallery:
2990 Ponce de León, Suite 101,
Coral Gables, FL 33134

MG DEVELOPER ONE | Sotheby's INTERNATIONAL REALTY

Artist's Conceptual Rendering




Artist's Conceptual Rendering

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Real estate trends along Florida's East Coast

While market conditions fluctuated throughout much of the past year, Florida's housing market closed 2025 on steadier footing, finishing largely in line with 2024. Despite economic headwinds such as a rising unemployment rate and slower in-migration, underlying demand remained resilient and supported a modest recovery in the second half of the year. Activity strengthened at the upper end of the market, with increased purchase volume among higher-priced properties and a notable rise in cash sales. More price-sensitive buyers remained cautious as elevated mortgage rates, insurance costs, and the broader cost of goods and services continued to challenge affordability. Even so, Florida's housing market demonstrated durability, particularly in premium segments where demand remained active and competitive.

The increase in available homes continued into the first half of 2025, as Florida's East Coast led much of the nation in the rapid surge of listings. Following a peak in April, a combination of rising purchase activity and fewer new listings coming onto the market helped bring available inventory back in line with 2024 levels. While counties including Miami-Dade and Broward in Southeast Florida and Flagler and Nassau in Northeast Florida had more homes available for sale, inventory declined across many adjacent counties.

With a greater number of homes on the market, it took longer to sell a home in every county along Florida's East Coast. The increase in time on market was smallest in counties with larger populations, while many outlying and suburban markets experienced more pronounced increases in the average time required to complete a sale.

Sales activity across Florida's East Coast was largely on par with 2024, with slightly fewer than 25,000 homes sold in each year. However, both years significantly outperformed 2023. Sales accelerated in Palm Beach County, as well as in Clay and Flagler counties, while the largest declines in closed sales occurred in Indian River and St. Johns counties. Overall, single-family home sales proved more resilient than condominiums. In 2025, aggregate condominium sales declined by 4%.

Median pricing increased in 2025, reaching $1.4 million for condominiums and $1.03 million for single-family homes. For single-family homes, median prices declined across portions of Southeast Florida, though results varied by price segment. The largest gains in median pricing occurred within higher-priced tiers, supported by an increase in sales above $5 million. At the same time, fewer homes sold below $1 million as affordability constraints continued to weigh on price-sensitive buyers. One notable exception was Flagler County, where the number of homes sold for less than $1 million increased in 2025.

Looking ahead, while market volatility may prove to be a key headwind in the year to come, underlying demand for housing across Florida's East Coast remains strong. Potential buyers will continue to be constrained by affordability, even as the potential for lower mortgage rates begins to emerge. Inventory is expected to remain elevated through at least the first half of the year, with the possibility of additional sellers entering the market should transaction activity accelerate. Pricing is expected to remain relatively stable within mid- and upper-priced segments, particularly in prime neighborhoods offering strong school districts and convenient access to major employment centers.

PONCE PARK

CORAL GABLES

The Most Exquisite Expression *of Home*

Ponce Park Coral Gables is a collection of just 58 residences, offering expansive two- to five-bedroom homes with interiors curated by award-winning design firm Meyer Davis. Every detail reflects a refined approach to elegance and exceptional craftsmanship.

Inspired by the Mediterranean spirit of Coral Gables, its timeless architecture harmonizes with the lush landscape and the neighborhood's rich heritage. With world-class dining, boutique shops, and cultural destinations just moments away, Ponce Park embodies a lifestyle of beauty, connection, and ease—at the heart of one of Miami's most sought-after neighborhoods.

Priced from $3.1M

Visit the Sales Gallery:
203 University Drive, Coral Gables, FL 33134

Future Residences Located at:
3000 Ponce de Leon Boulevard Coral Gables, FL 33134

@PonceParkCoralGables PoncePark.com

Artist's Conceptual Rendering

ALLEN MORRIS COMPANY

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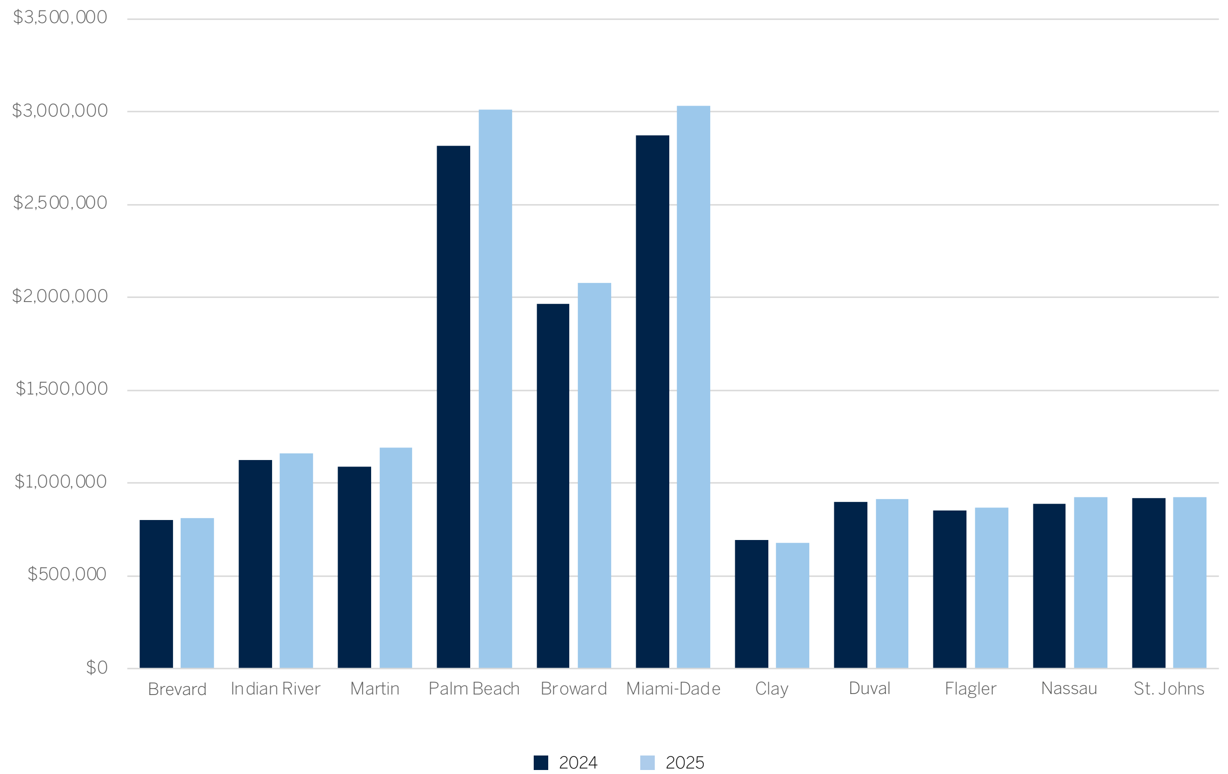
Florida's East Coast Snapshot

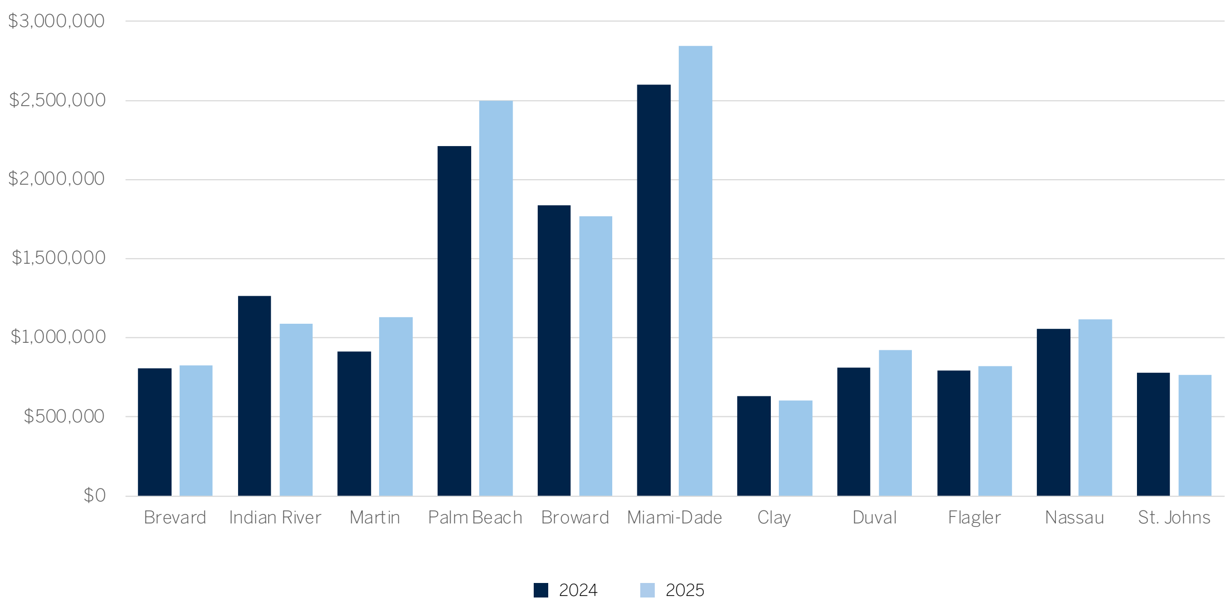
Market data represents single-family and condominium properties above $1,000,000 for Miami-Dade, Broward and Palm Beach County and above $500,000 for Martin, Indian River, Brevard, Clay, Duval, Nassau, Flagler and St. Johns County.

	FOR-SALE LISTINGS		MEDIAN SALES PRICE		AVG. SALES PRICE		AVG. PRICE PER SF		CLOSED TRANSACTIONS		HIGHEST SALE
	DEC 25	CHANGE FROM PRIOR MONTH	2025	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
MIAMI-DADE COUNTY											
SINGLE-FAMILY HOMES	2,226	-5%	$1,700,000	1%	$3,030,473	5%	$850	1%	2,560	2%	$74,250,000
CONDOMINIUMS	2,921	-1%	$1,780,000	5%	$2,843,073	9%	$1,197	7%	1,654	-2%	$38,200,000
BREVARD COUNTY											
SINGLE-FAMILY HOMES	840	-7%	$675,000	2%	$809,026	1%	$308	-1%	2,434	1%	$6,150,000
CONDOMINIUMS	245	4%	$705,000	1%	$827,506	2%	$402	-1%	281	-8%	$3,150,000
BROWARD COUNTY											
SINGLE-FAMILY HOMES	1,447	-4%	$1,450,000	0%	$2,075,774	6%	$587	2%	2,071	0%	$27,800,000
CONDOMINIUMS	795	-2%	$1,500,000	0%	$1,767,918	-4%	$757	-1%	436	0%	$8,126,000
INDIAN RIVER COUNTY											
SINGLE-FAMILY HOMES	601	-4%	$723,500	-1%	$1,156,884	3%	$402	0%	868	-3%	$12,500,000
CONDOMINIUMS	206	4%	$840,000	-5%	$1,090,592	-14%	$519	-13%	172	-8%	$3,950,000
MARTIN COUNTY											
SINGLE-FAMILY HOMES	203	-4%	$759,000	-3%	$1,191,461	10%	$400	3%	591	2%	$24,290,425
CONDOMINIUMS	46	-10%	$675,000	-5%	$1,132,515	24%	$546	14%	65	-2%	$3,900,000
PALM BEACH COUNTY											
SINGLE-FAMILY HOMES	2,128	-4%	$1,675,000	2%	$3,009,461	7%	$741	-32%	3,361	9%	$97,500,000
CONDOMINIUMS	1,002	4%	$1,789,350	8%	$2,496,756	13%	$1,020	7%	886	-1%	$16,500,000
CLAY COUNTY											
ALL RESIDENTIAL	32	-9%	$599,000	0%	$674,616	-3%	$229	-2%	459	6%	$2,225,000
DUVAL COUNTY											
ALL RESIDENTIAL	114	-34%	$689,115	1%	$915,860	3%	$229	-2%	2,436	-3%	$15,500,000
FLAGLER COUNTY											
ALL RESIDENTIAL	115	13%	$695,000	-1%	$862,567	2%	$329	-2%	1,117	5%	$3,600,000
NASSAU COUNTY											
ALL RESIDENTIAL	146	-8%	$735,000	-1%	$946,918	4%	$388	-1%	1,459	-1%	$10,500,000
ST. JOHNS COUNTY											
ALL RESIDENTIAL	248	-23%	$701,600	1%	$914,307	1%	$334	-1%	3,928	-8%	$18,750,000

Average Sales Price | Single-Family Homes



Average Sales Price | Condominiums



Market data represents single-family and condominium properties above $1,000,000 for Miami-Dade, Broward and Palm Beach County and above $500,000 for Martin, Indian River, Brevard, Clay, Duval, Nassau, Flagler and St. Johns County.

ELLA

A DISTINCTIVE COLLECTION OF ONLY 103 RESIDENCES SOUL-INSPIRED BY MIAMI BEACH'S GLAMOROUS HEYDAY

Offering fully furnished studio to two-bedroom homes by Interiors by Steven G, with short-term rentals permitted. Residents will enjoy 22,000 sq ft of curated amenities, including a rooftop wellness level with a pool, paddle court, sauna, cold plunge, and fitness center, all boasting stunning views of Biscayne Bay and Downtown Miami.

Now Under Construction

Priced From $600,000's

Future Residences Located at:
6940 Abbot Ave Miami Beach, 33141

@ellamiamibeach

ELLAMIAMIBEACH.COM

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Sales Gallery:
6897 Collins Ave, Miami Beach, FL 33141

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Miami-Dade County

HIGHEST MEDIAN PRICE IN THE REGION

Miami-Dade recorded the highest median single family price in the southeast Florida region. The median price increased by 1% and total sales increased by 2% year-over-year, consistent with continued high-end market activity.

$1.7M ▲1%
MEDIAN SALES PRICE

$717 ▲1%
MEDIAN PPSF

88 ▲9%
AVG. DAYS ON MARKET

2,560 ▲2%
SOLD LISTINGS

2,226 ▲7%
ACTIVE LISTINGS

MARKET DATA FOR SINGLE-FAMILY HOMES, $1,000,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
AVENTURA	$1,500,000	$1,450,000	3%	$549	-6%	13	-46%	103
BAL HARBOUR	$69,500,000	$13,470,000	416%	$7,634	195%	1	-83%	-
BAY HARBOR ISLANDS	$5,780,000	$8,175,000	-29%	$1,496	-29%	6	-25%	170
COCONUT GROVE	$2,650,000	$2,500,000	6%	$958	-3%	153	7%	75
CORAL GABLES	$2,435,000	$2,000,000	22%	$932	4%	318	1%	81
FISHER ISLAND	$7,500,000	$21,000,000	-64%	$2,277	2%	3	200%	3
GOLDEN BEACH	$6,620,000	$8,575,000	-23%	$1,367	-2%	9	-25%	180
KEY BISCAYNE	$3,838,000	$4,000,000	-4%	$1,394	8%	38	-19%	98
MIAMI	$1,420,000	$1,405,000	1%	$578	1%	823	8%	85
MIAMI BEACH	$3,650,000	$3,550,000	3%	$1,210	-4%	210	7%	117
MIAMI SHORES	$1,415,000	$1,495,000	-5%	$697	-8%	94	-2%	60
NORTH BAY VILLAGE	$1,350,000	$1,280,000	5%	$1,049	64%	9	-57%	59
PINECREST	$2,625,000	$2,800,000	-6%	$773	-2%	183	15%	104
SOUTH MIAMI	$1,912,500	$1,489,000	28%	$761	2%	56	-7%	82
SUNNY ISLES BEACH	$2,150,000	$2,750,000	-22%	$808	1%	7	-68%	167
SURFSIDE	$1,550,000	$1,477,500	5%	$919	4%	31	-23%	120

Miami-Dade County

LUXURY MARKET SUPPORTS PRICING

Despite a 2% decline in sales, the median condo price increased by 5%, the second-highest price growth among major Southeast Florida markets. Miami-Dade County also recorded the smallest year-over-year increase in average days on the market in the region.

$1.78M ▲ 5%
MEDIAN SALES PRICE

$968 ▲ 5%
MEDIAN PPSF

119 ▲ 3%
AVG. DAYS ON MARKET

1,654 ▼ -2%
SOLD LISTINGS

2,921 ▲ 2%
ACTIVE LISTINGS

MARKET DATA FOR CONDOMINIUMS, $1,000,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
AVENTURA	$1,753,600	$1,600,000	10%	$605	5%	112	-20%	133
BAL HARBOUR	$2,730,000	$3,100,000	-12%	$1,272	10%	67	3%	122
BAY HARBOR ISLANDS	$1,900,000	$1,580,000	20%	$841	1%	25	-7%	173
BRICKELL/DOWNTOWN MIAMI/EDGEWATER	$1,465,000	$1,400,000	5%	$856	-4%	237	-10%	101
COCONUT GROVE	$1,750,000	$1,850,000	-5%	$942	7%	167	1%	104
CORAL GABLES	$1,800,000	$1,527,775	18%	$679	-3%	47	31%	104
FISHER ISLAND	$5,600,000	$8,510,000	-34%	$1,988	3%	28	-20%	162
KEY BISCAYNE	$1,600,000	$1,700,000	-6%	$916	-3%	109	4%	96
MIAMI	$1,555,000	$1,350,000	15%	$934	4%	160	-14%	109
MIAMI BEACH	$2,000,000	$1,885,000	6%	$1,400	8%	386	15%	120
MIAMI SHORES	$1,430,000	N/A	N/A	$509	N/A	1	N/A	68
NORTH BAY VILLAGE	$1,400,000	$1,529,000	-8%	$620	7%	5	25%	122
PINECREST	$1,647,500	$1,246,000	32%	$560	26%	3	0%	66
SOUTH MIAMI	$1,075,000	N/A	N/A	$489	N/A	1	N/A	36
SUNNY ISLES BEACH	$2,150,000	$2,000,000	8%	$1,005	1%	255	-8%	147
SURFSIDE	$6,850,000	$2,200,000	211%	$2,699	128%	27	8%	177

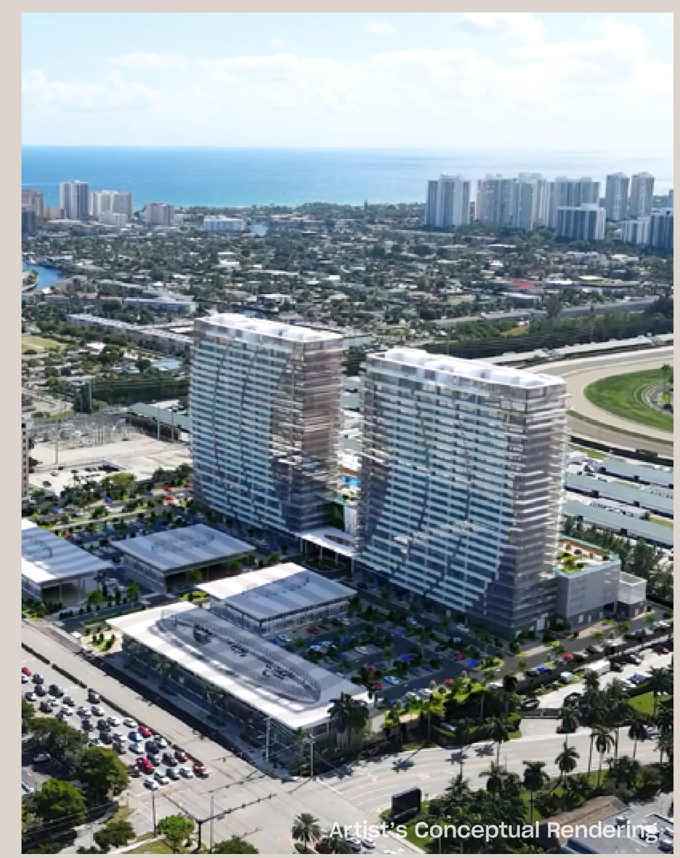
Artist's Conceptual Rendering

OASIS

EAST RESIDENCES

Oasis Hallandale is Hallandale Beach's first true mixed-use destination—where modern residences meet curated retail, dining, and creative office spaces. Conveniently located between Miami and Fort Lauderdale, its striking architecture, thoughtful design, and resort-style amenities offer a complete lifestyle experience: a place to live, work, and enjoy.

The development features a collection of one-to three-bedroom homes and 95,000 sq. ft. of commercial space, all just minutes from the beach, with the West Tower delivering this year, 2026.



Artist's Conceptual Rendering

Priced from Mid $700Ks

West Tower Delivery - 2026

East Tower Delivery - 2027

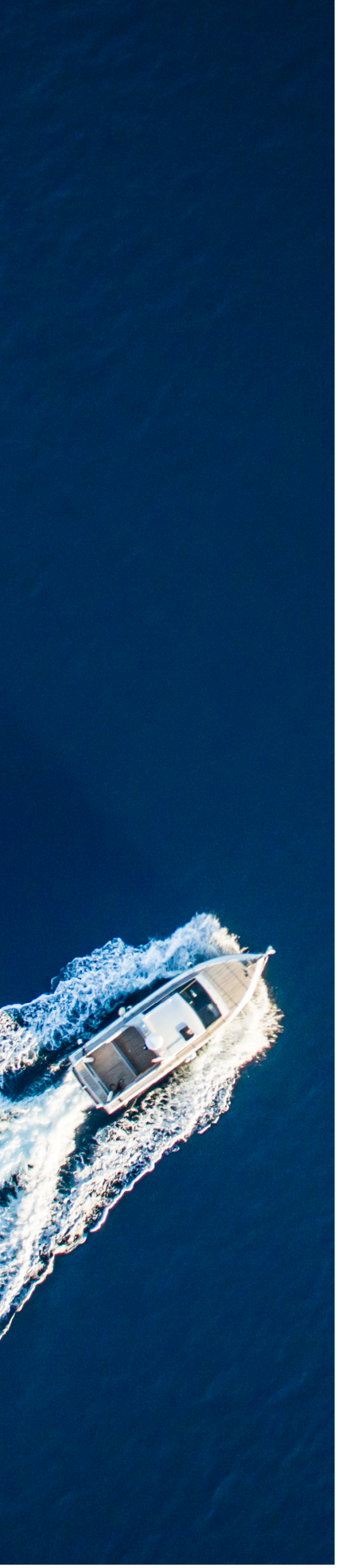
Visit Our Sales Gallery

1000 E Hallandale Beach Blvd,
Unit 1-109, Hallandale Beach,
Florida 33009

Hallandaleoasis.com

@oasishallandale

mgm CONSTRUCTION GROUP



Broward County

SALES ACTIVITY DECLINES

Single family sales and median price remained virtually unchanged in 2025. Homes took longer to sell, with time on market rising by 18%.

$1.45M 0%
MEDIAN SALES PRICE

$484 ▲ 2%
MEDIAN PPSF

83 ▲ 18%
AVG. DAYS ON MARKET

2,071 0%
SOLD LISTINGS

1,447 ▼ -4%
ACTIVE LISTINGS

MARKET DATA FOR SINGLE-FAMILY HOMES, $1,000,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
COOPER CITY	$1,300,000	$1,235,000	5%	$392	-3%	69	13%	86
CORAL SPRINGS	$1,175,000	$1,100,000	7%	$343	3%	59	5%	58
DAVIE	$1,558,000	$1,565,000	0%	$436	6%	185	8%	69
DEERFIELD BEACH	$1,262,500	$1,370,000	-8%	$613	6%	34	-3%	75
FORT LAUDERDALE	$2,000,000	$1,900,000	5%	$774	4%	483	1%	103
HALLANDALE	$2,925,000	$2,750,000	6%	$998	-2%	10	25%	182
HILLSBORO BEACH	$15,650,000	$18,400,000	-15%	$2,143	26%	5	67%	196
HOLLYWOOD	$1,320,853	$1,350,000	-2%	$516	3%	100	-3%	97
LAUDERDALE-BY-THE-SEA	$1,458,000	$1,700,000	-14%	$675	-15%	23	35%	118
LIGHTHOUSE POINT	$2,150,000	$1,725,000	25%	$766	1%	100	8%	90
MIRAMAR	$1,187,500	$1,200,000	-1%	$352	-1%	72	-22%	67
PARKLAND	$1,322,500	$1,315,000	1%	$376	-1%	288	-8%	62
PEMBROKE PINES	$1,117,500	$1,190,000	-6%	$347	2%	48	45%	63
PLANTATION	$1,400,000	$1,400,000	0%	$433	8%	108	14%	82
POMPANO BEACH	$1,410,000	$1,590,000	-11%	$690	-10%	114	12%	90
SOUTHWEST RANCHES	$1,800,000	$1,915,000	-6%	$582	-1%	64	-28%	89
WESTON	$1,275,000	$1,305,000	-2%	$415	-1%	227	-8%	67
WILTON MANORS	$1,295,000	$1,250,000	4%	$636	-4%	47	34%	88

Broward County

CONDO MARKET SLOWS

Condo sales were essentially flat in 2025, while the median price was unchanged from the prior year. Both listing volume as well as time on market increased.

$1.5M 0%
MEDIAN SALES PRICE

$697 0%
MEDIAN PPSF

104 ▲ 10%
AVG. DAYS ON MARKET

436 0%
SOLD LISTINGS

795 ▲ 18%
ACTIVE LISTINGS

MARKET DATA FOR CONDOMINIUMS, $1,000,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
DEERFIELD BEACH	$1,300,000	$1,231,000	6%	$563	-4%	9	13%	90
FORT LAUDERDALE	$1,525,000	$1,501,530	2%	$684	-1%	277	3%	109
HALLANDALE	$1,375,000	$1,335,000	3%	$777	-2%	34	0%	97
HILLSBORO BEACH	$1,550,000	$1,690,000	-8%	$643	4%	8	-11%	108
HOLLYWOOD	$1,440,000	$1,550,000	-7%	$707	-1%	37	-18%	94
LAUDERDALE-BY-THE-SEA	$1,600,000	$1,662,500	-4%	$556	-11%	25	25%	101
POMPANO BEACH	$1,750,000	$1,517,425	15%	$834	6%	45	-2%	87
WILTON MANORS	$1,025,000	$1,025,000	0%	$434	-26%	1	0%	66

Palm Beach County

NEIGHBORHOOD SNAPSHOTS

STRONGEST SALES GROWTH IN 2025

Palm Beach County recorded the largest increase in single family sales, increasing by 9% year-over-year. The median price increased by 2%, and homes spent among the fewest days on market compared to the surrounding area.

$1.68M ▲ 2%
MEDIAN SALES PRICE

$561 ▲ 4%
MEDIAN PPSF

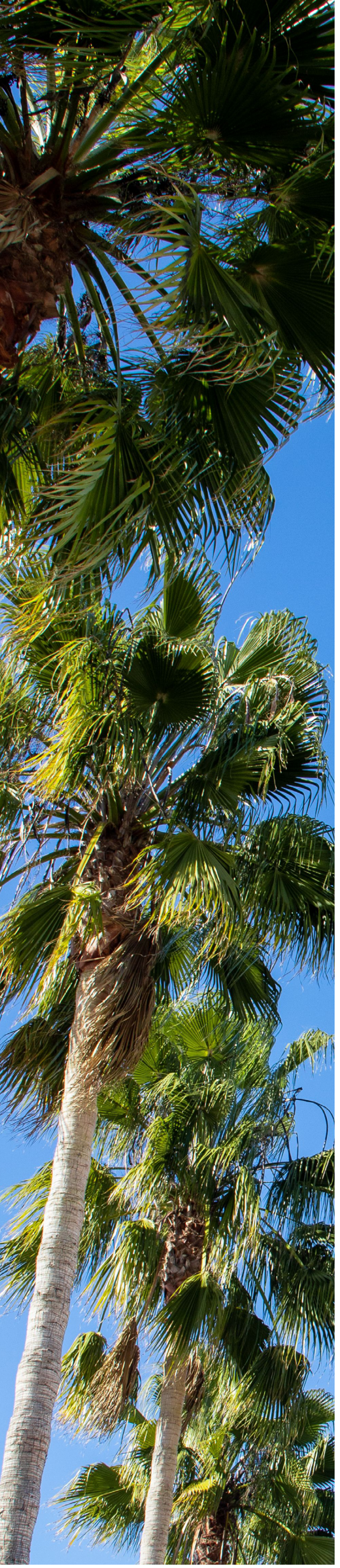
80 ▼ -3%
AVG. DAYS ON MARKET

3,361 ▲ 9%
SOLD LISTINGS

2,128 ▲ 3%
ACTIVE LISTINGS

MARKET DATA FOR SINGLE-FAMILY HOMES, $1,000,000+

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
BOCA RATON	$1,800,000	$1,850,000	-3%	$540	1%	908	4%	69
BOYNTON BEACH	$1,250,000	$1,285,000	-3%	$434	-1%	184	9%	62
DELRAY BEACH	$1,650,000	$1,676,250	-2%	$560	4%	464	18%	64
HIGHLAND BEACH	$12,000,000	$4,300,000	179%	$1,568	30%	7	-22%	235
JUNO BEACH	$1,950,000	$2,262,500	-14%	$812	-12%	9	-50%	51
JUPITER	$1,650,000	$1,575,000	5%	$557	-1%	388	6%	69
JUPITER INLET COLONY	$4,500,000	$4,937,500	-9%	$1,443	-19%	9	50%	166
LAKE WORTH	$1,212,500	$1,250,000	-3%	$380	-6%	48	30%	65
LANTANA	$3,100,000	$1,900,000	63%	$942	10%	15	36%	102
NORTH PALM BEACH	$3,003,000	$2,725,000	10%	$888	-7%	77	20%	88
MANALAPAN	$8,750,000	$14,294,843	-39%	$1,529	-12%	10	-29%	206
PALM BEACH	$13,750,000	$10,800,000	27%	$2,996	9%	73	33%	165
PALM BEACH GARDENS	$1,575,000	$1,586,001	-1%	$520	6%	503	7%	84
SINGER ISLAND	$2,125,000	$2,162,500	-2%	$808	-3%	38	73%	62
TEQUESTA	$1,275,000	$1,350,000	-6%	$620	5%	30	-19%	84
WELLINGTON	$1,660,000	$1,400,000	19%	$449	3%	155	-14%	99
WEST PALM BEACH	$1,642,500	$1,650,000	0%	$759	15%	304	25%	101



Palm Beach County

PRICES INCREASE AS ACTIVITY SOFTENS

Condo sales declined slightly by 1%, while the median price increased by 8%, the strongest price gain in the condo market in the region. Although days on the market remained the lowest among regional condo markets, it increased by 31% year-over-year.

$1.79M ▲ 8%
MEDIAN SALES PRICE

$867 ▲ 4%
MEDIAN PPSF

101 ▲ 31%
AVG. DAYS ON MARKET

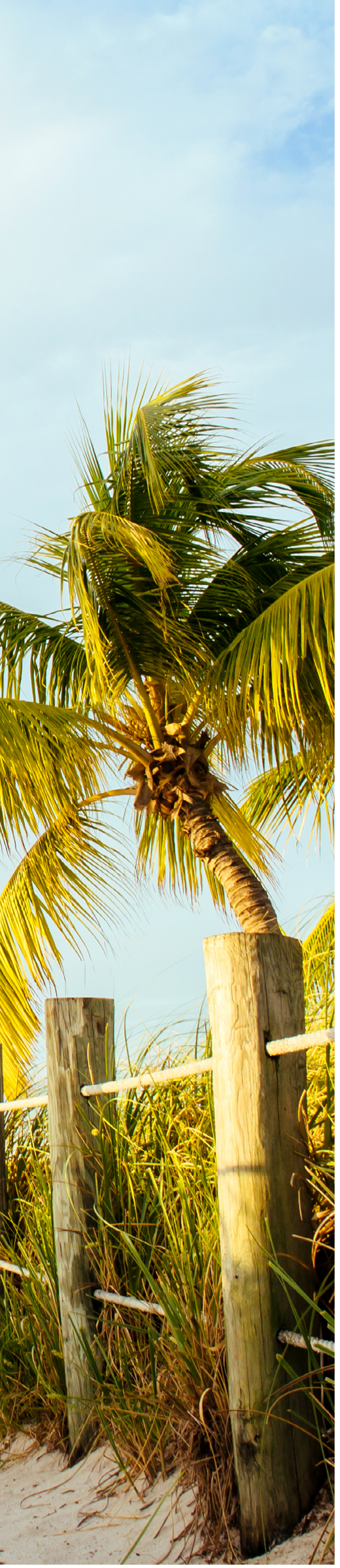
886 ▼ -1%
SOLD LISTINGS

1,002 ▼ -1%
ACTIVE LISTINGS

MARKET DATA FOR CONDOMINIUMS, $1,000,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
BOCA RATON	$1,793,000	$1,650,000	9%	$912	9%	240	7%	76
BOYNTON BEACH	$1,398,750	$1,195,971	17%	$668	29%	4	0%	78
DELRAY BEACH	$1,532,500	$1,540,000	0%	$796	-1%	95	-9%	93
HIGHLAND BEACH	$1,425,000	$1,675,000	-15%	$714	-12%	66	8%	129
JUNO BEACH	$1,616,500	$1,737,500	-7%	$761	1%	20	-17%	65
JUPITER	$1,857,500	$1,725,000	8%	$799	-2%	68	13%	70
NORTH PALM BEACH	$2,200,000	$1,900,000	16%	$907	16%	28	-18%	163
MANALAPAN	$1,485,000	$1,530,000	-3%	$906	-11%	2	-33%	213
PALM BEACH	$2,300,000	$2,325,000	-1%	$1,338	8%	145	42%	134
PALM BEACH GARDENS	$1,337,000	$1,537,500	-13%	$751	22%	36	64%	74
SINGER ISLAND	$1,767,500	$1,500,000	18%	$864	0%	68	-47%	112
TEQUESTA	$1,592,500	$1,375,000	16%	$888	17%	10	0%	238
WELLINGTON	$1,387,500	$1,175,000	18%	$694	28%	12	33%	85
WEST PALM BEACH	$1,760,000	$1,602,500	10%	$976	9%	69	-18%	118



Martin County

SALES IMPROVE, PRICES EASE

Total sales increased modestly by 2% in 2025, while the median price declined by 3%. Homes took longer to sell, with time on market increasing by 27%.

$759K ▼ -3%
MEDIAN SALES PRICE

$329 ▼ -1%
MEDIAN PPSF

81 ▲ 27%
AVG. DAYS ON MARKET

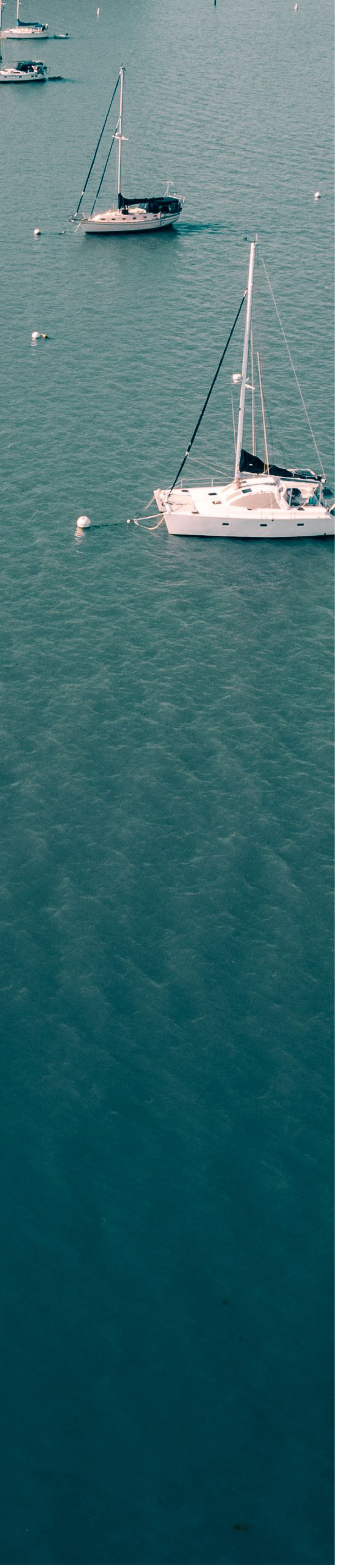
591 ▲ 2%
SOLD LISTINGS

203 ▼ -10%
ACTIVE LISTINGS

MARKET DATA FOR SINGLE-FAMILY HOMES, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
HOBE SOUND	$675,000	$677,500	0%	$324	3%	49	-2%	79
HUTCHINSON ISLAND	$1,850,888	$2,590,000	-29%	$540	-11%	25	14%	92
JENSEN BEACH	$650,000	$655,000	-1%	$315	-1%	74	32%	69
JUPITER ISLAND	$17,750,000	$8,562,500	107%	$2,401	23%	17	70%	111
PALM CITY	$779,125	$820,000	-5%	$312	-1%	376	-5%	84
SEWALL'S POINT	$1,512,500	$1,312,500	15%	$511	14%	46	5%	74
STUART	$815,000	$800,000	2%	$350	-1%	221	-1%	79



Martin County

CONDO SECTOR WEAKENS

Condo sales declined by 2% and the median price declined by 5%. Not only was the average time on market the highest in the region but roughly doubled from 2024.

$675K ▼ -5%
MEDIAN SALES PRICE

$483 ▲ 10%
MEDIAN PPSF

160 ▲ 97%
AVG. DAYS ON MARKET

65 ▼ -2%
SOLD LISTINGS

46 ▼ -45%
ACTIVE LISTINGS

MARKET DATA FOR CONDOMINIUMS, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
HOBE SOUND	$1,015,000	$518,000	96%	$426	59%	2	100%	4
HUTCHINSON ISLAND	$693,500	$680,000	2%	$536	19%	44	7%	191
JENSEN BEACH	$1,875,000	$1,250,000	50%	$466	25%	1	0%	272
PALM CITY	$1,077,500	$1,015,000	6%	$427	22%	2	-75%	114
STUART	$675,000	$762,450	-11%	$430	1%	13	-7%	104

ARTIST'S CONCEPTIAL RENDERING

Indian River County

MARKET COOLS

Single family sales declined by 3% in 2025, the largest decline in the region. At the same time, the median price edged lower by 1%.

$724K ▼ -1%
MEDIAN SALES PRICE

$313 ▲ 1%
MEDIAN PPSF

107 ▲ 11%
AVG. DAYS ON MARKET

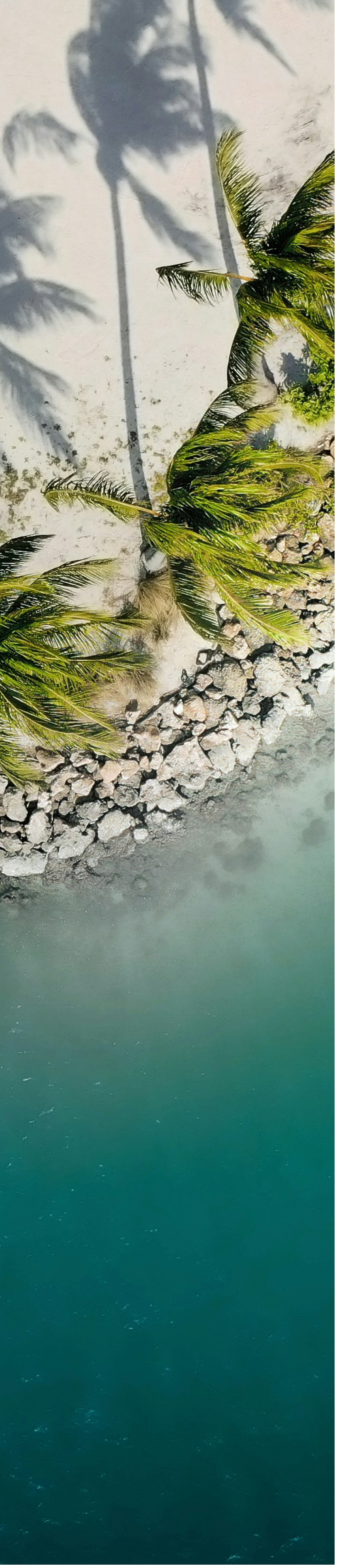
868 ▼ -3%
SOLD LISTINGS

601 ▼ -12%
ACTIVE LISTINGS

MARKET DATA FOR SINGLE-FAMILY HOMES, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
BARRIER ISLAND	$1,397,500	$1,292,500	8%	$512	0%	234	4%	124
MAINLAND VERO BEACH	$635,000	$640,000	-1%	$273	0%	385	-4%	112
SEBASTIAN/ FELLSMERE	$620,500	$620,000	0%	$302	9%	32	-24%	78



Indian River County

FEWER SALES, LOWER PRICES

Condo sales declined by 8% year-over-year in 2025, while the median price declined by 5%.

$840K ▼ -5%
MEDIAN SALES PRICE

$425 ▼ -10%
MEDIAN PPSF

131 ▲ 13%
AVG. DAYS ON MARKET

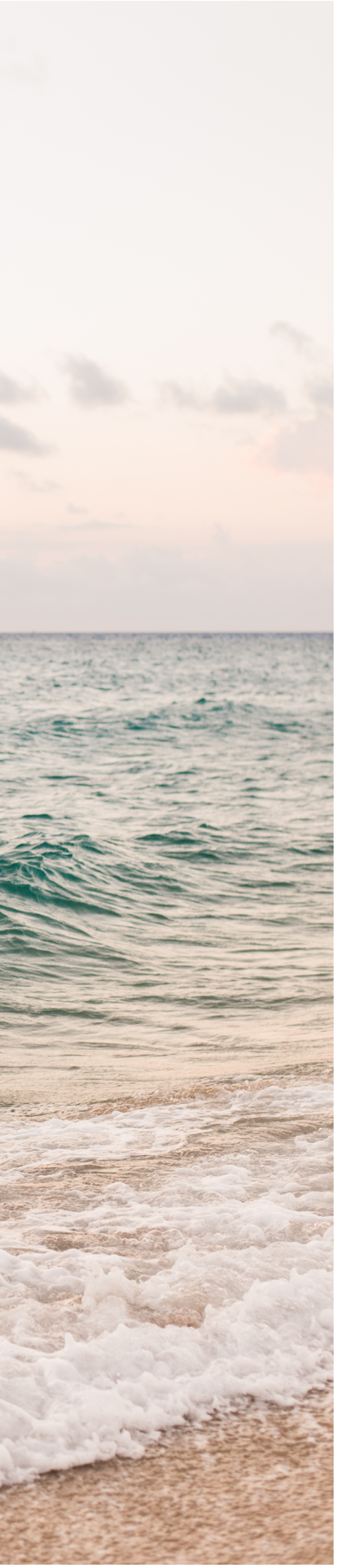
172 ▼ -8%
SOLD LISTINGS

206 ▼ -2%
ACTIVE LISTINGS

MARKET DATA FOR CONDOMINIUMS, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
BARRIER ISLAND	$870,000	$970,000	-10%	$469	-15%	113	-11%	135
MAINLAND VERO BEACH	$714,861	$677,000	6%	$333	2%	38	-5%	110
SEBASTIAN/FELLS-MERE	$589,900	$525,000	12%	$295	-25%	1	0%	222



Brevard County

SALES ACTIVITY STRENGTHENS

Total sales increased by 1% year-over-year in Brevard County, though it took longer on average to sell a home in 2025 than in 2024. The median price increased by 2%, one of the largest increases in the region.

$675K ▲ 2%
MEDIAN SALES PRICE

$283 0%
MEDIAN PPSF

64 ▲ 24%
AVG. DAYS ON MARKET

2,434 ▲ 1%
SOLD LISTINGS

840 ▼ -7%
ACTIVE LISTINGS

MARKET DATA FOR SINGLE-FAMILY HOMES, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
COCOA	$612,500	$599,450	2%	$271	8%	84	24%	65
COCOA BEACH	$855,000	$817,000	5%	$423	-10%	85	2%	78
GRANT	$596,923	$650,000	-8%	$274	9%	32	-40%	84
INDIALANTIC	$750,000	$782,500	-4%	$329	-4%	139	42%	77
MALABAR	$675,000	$675,000	0%	$265	-5%	41	-5%	96
MELBOURNE	$690,000	$663,650	4%	$275	0%	948	-6%	54
MELBOURNE BEACH	$812,500	$870,000	-7%	$376	-7%	135	-11%	93
MERRITT ISLAND	$672,500	$660,000	2%	$276	-3%	303	1%	69
MIMS	$640,000	$600,000	7%	$269	4%	34	26%	75
PALM BAY	$560,000	$574,000	-2%	$223	-4%	98	4%	61
ROCKLEDGE	$658,750	$635,000	4%	$265	-2%	166	2%	62
SATELLITE BEACH & INDIAN HARBOUR BEACH	$682,500	$672,500	1%	$337	0%	222	18%	58
TITUSVILLE	$584,900	$565,450	3%	$226	-1%	75	25%	79
WEST MELBOURNE	$570,000	$563,750	1%	$223	-1%	23	-39%	65

Brevard County

SALES DECLINE

Condo sales declined by 8% in 2025, but the median price increased by a modest 1%. The increase in the average days on market was among the highest of the surrounding counties.

$705K ▲ 1%
MEDIAN SALES PRICE

$397 ▼ -1%
MEDIAN PPSF

113 ▲ 26%
AVG. DAYS ON MARKET

281 ▼ -8%
SOLD LISTINGS

245 ▼ -9%
ACTIVE LISTINGS

MARKET DATA FOR CONDOMINIUMS, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
COCOA	$670,000	$687,500	-3%	$314	-3%	15	7%	107
COCOA BEACH	$685,000	$650,000	5%	$409	4%	91	21%	120
INDIALANTIC	$725,000	$843,750	-14%	$404	-6%	39	-39%	90
MELBOURNE	$732,500	$662,000	11%	$318	8%	6	-50%	119
MELBOURNE BEACH	$789,500	$911,250	-13%	$440	-3%	28	-22%	125
MERRITT ISLAND	$575,000	$567,625	1%	$253	-19%	4	-20%	152
PALM BAY	$535,000	$875,000	-39%	$230	-8%	5	400%	239
ROCKLEDGE	$640,000	$708,000	-10%	$309	8%	1	-67%	119
SATELLITE BEACH & INDIAN HARBOUR BEACH	$725,000	$765,000	-5%	$388	-8%	70	49%	104
TITUSVILLE	$525,000	$555,000	-5%	$249	-8%	5	-50%	169

RESIDENCES TAILORED TO YOU

For the first time, the Dolce&Gabbana legacy of craftsmanship and expression come to life in the residences and hotel at 888 Brickell. This is where the creative, the curious, the makers, and the thinkers come to revel in the designers' dream.

Featuring 259 meticulously curated one- to four-bedroom residences, 888 Brickell embodies the brand's signature artistry, complemented by five-star amenities.

Phase 1 demolition is now complete, paving the way for Miami's next architectural icon.

Schedule a Private Tour Today by Appointment Only

Pricing Upon Request

888.dolcegabbana.com

Future Residences Located at
888 Brickell Avenue Miami FL, 33131

888brickellave

Flagler County

SALES IMPROVE, SLOWER MARKET

Sales increased despite modest price declines. The softer demand translated to homes remaining on the market for longer than the surrounding region.

$695K ▼ -1%
MEDIAN SALES PRICE

$310 ▲ 1%
MEDIAN PPSF

101 ▲ 31%
AVG. DAYS ON MARKET

1,117 ▲ 5%
SOLD LISTINGS

115 ▲ 11%
ACTIVE LISTINGS

MARKET DATA FOR ALL RESIDENTIAL PROPERTIES, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
BUNNELL	$868,000	$647,500	34%	$258	-17%	5	-38%	106
FLAGLER BEACH	$715,000	$718,000	0%	$349	1%	107	27%	108
PALM COAST	$710,000	$710,000	0%	$316	3%	451	1%	104

St. Johns County

NEIGHBORHOOD SNAPSHOTS

STEEPEST DROP IN SALES

Sales declined by 8% year-over-year while prices increased modestly. Days on market were elevated, consistent with a slower pace of transactions.

$702K ▲ 1%
MEDIAN SALES PRICE

$287 ▲ 1%
MEDIAN PPSF

87 ▲ 16%
AVG. DAYS ON MARKET

3,928 ▼ -8%
SOLD LISTINGS

248 ▼ -4%
ACTIVE LISTINGS

MARKET DATA FOR ALL RESIDENTIAL PROPERTIES, $500,000+

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
JULINGTON CREEK AREA	$676,500	$659,066	3%	$242	-1%	446	-13%	77
NOCATEE	$755,000	$815,000	-7%	$305	-3%	618	-7%	87
PONTE VEDRA BEACH	$1,186,850	$1,250,000	-5%	$423	-4%	466	2%	62
SOUTHEAST ST JOHNS COUNTY	$690,500	$700,000	-1%	$381	-3%	308	-5%	106
ST AUGUSTINE BEACHES/ANASTASIA ISLAND	$656,000	$650,000	1%	$323	0%	86	-18%	76
ST JOHNS	$654,216	$650,990	0%	$246	0%	702	-8%	89
SOUTHWEST ST JOHNS COUNTY	$585,000	$580,000	1%	$249	3%	43	-22%	86
ST AUGUSTINE/VILANO BEACH	$797,000	$747,500	7%	$346	5%	141	-20%	96
WORLD GOLF VILLAGE AREA/PALENCIA	$614,020	$616,901	0%	$225	-2%	470	-8%	81

ZIGGURAT

Ziggurat is a sculptural tribute to Coconut Grove—a place where visionary architecture and natural beauty exist in quiet harmony. Conceived by Oppenheim Architecture, with interiors by Collarte Interiors, the design embraces organic textures, warm hues, and richly layered materials to create a grounded sense of refined tranquility.

Home to just 18 boutique residences ranging from two to five bedrooms, each home is thoughtfully wrapped in lush greenery, echoing the Grove's iconic canopy and signature indoor-outdoor lifestyle.

Located just moments from charming cafés, verdant parks, and the bayfront, Ziggurat captures the authentic spirit of the neighborhood it was designed to celebrate.

Priced From $3.5M

Sales Gallery Now Open
3065 Fuller Street, Coconut Grove, FL, 33133

Future Residences Located at:
3101 Grand Avenue, Coconut Grove, FL 33133

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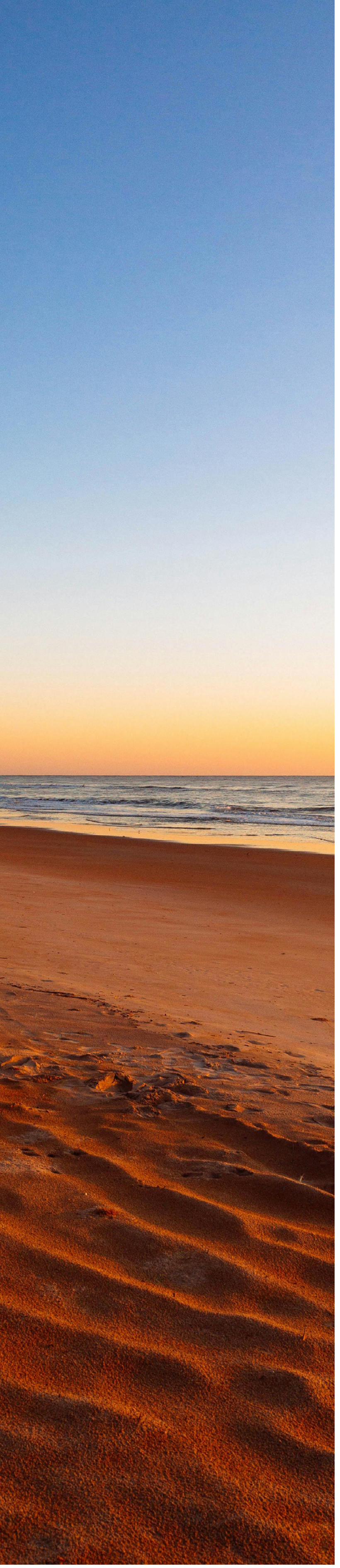
ARTIST'S CONCEPTUAL RENDERING



Clay County

SALES INCREASE, PRICING FLAT

Total sales increased by 6% in 2025 while the median price was essentially unchanged. With little available inventory, sales activity may remain low.

$599K 0%
MEDIAN SALES PRICE

$213 -1%
MEDIAN PPSF

70 9%
AVG. DAYS ON MARKET

459 6%
SOLD LISTINGS

32 -20%
ACTIVE LISTINGS

MARKET DATA FOR ALL RESIDENTIAL PROPERTIES, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
FLEMING ISLAND	$640,000	$635,000	1%	$227	-1%	147	-8%	56
GREEN COVE SPRINGS	$567,500	$599,450	-5%	$220	-2%	41	-2%	66
MIDDLEBURG/ KEYSTONE	$577,495	$575,000	0%	$210	2%	120	21%	85
ORANGE PARK	$635,000	$590,250	8%	$212	10%	28	-13%	80
OAKLEAF PLANTATION	$600,000	$590,500	2%	$187	0%	56	6%	54

Duval County

SALES DECLINE, MARKET SLOWS

Total sales declined by 3% from a year prior, while the median price increased by 1%. The average time on market was the lowest in northeast Florida.

$689K ▲ 1%
MEDIAN SALES PRICE

$298 ▲ 1%
MEDIAN PPSF

67 ▲ 19%
AVG. DAYS ON MARKET

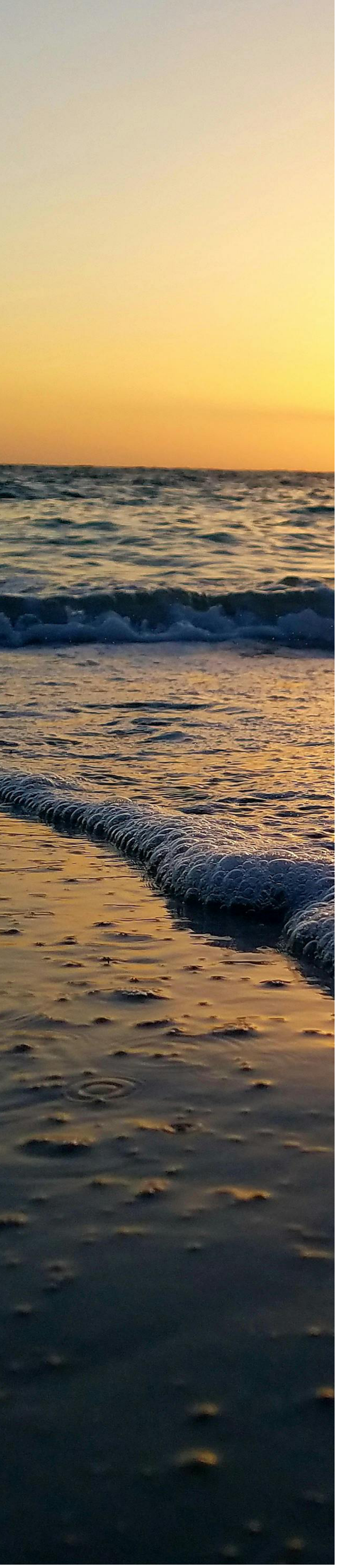
2,436 ▼ -3%
SOLD LISTINGS

114 ▼ -26%
ACTIVE LISTINGS

MARKET DATA FOR ALL RESIDENTIAL PROPERTIES, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
ARLINGTON/ FORT CAROLINE	$610,000	$610,000	0%	$235	3%	81	-15%	64
AVONDALE/RIVERSIDE/ ORTEGA	$665,000	$690,900	-4%	$315	1%	180	13%	62
BARTRAM	$540,000	$548,500	-2%	$195	-1%	32	-11%	43
BEACHES	$850,000	$763,750	11%	$447	0%	626	10%	70
BEAUCLERC/ MANDARIN	$610,000	$613,750	-1%	$226	0%	240	-12%	71
DOWNTOWN JACKSONVILLE	$592,031	$552,714	7%	$227	-8%	18	-14%	46
INTRACOASTAL	$713,323	$758,900	-6%	$289	-1%	724	-7%	69
NOCATEE (DUVAL)	$560,000	$525,280	7%	$215	-3%	5	-81%	31
NORTH JACKSONVILLE	$644,300	$649,950	-1%	$237	4%	85	-6%	86
SAN MARCO/SAN JOSE	$709,250	$745,000	-5%	$306	-8%	124	-11%	63
SOUTHSIDE	$665,000	$625,000	6%	$232	-3%	145	-6%	48
WEST JACKSONVILLE	$599,000	$579,950	3%	$229	12%	51	16%	85



Nassau County

MARKET COOLS

Sales and median prices each declined by 1% in 2025. Homes spent more time on the market in 2025.

$735K ▼ -1%
MEDIAN SALES PRICE

$336 ▼ -4%
MEDIAN PPSF

77 ▲ 24%
AVG. DAYS ON MARKET

1,459 ▼ -1%
SOLD LISTINGS

146 ▲ 8%
ACTIVE LISTINGS

MARKET DATA FOR ALL RESIDENTIAL PROPERTIES, $500,000+

NEIGHBORHOOD SNAPSHOTS

	MEDIAN SALES PRICE			MEDIAN PRICE PER SF		CLOSED TRANSACTIONS		DAYS ON MARKET
	2025	2024	YOY% CHANGE	2025	YOY% CHANGE	2025	YOY% CHANGE	2025
AMELIA ISLAND/ FERNANDINA BEACH	$810,000	$810,000	0%	$379	-4%	714	-2%	71
YULEE/WILDLIGHT	$610,000	$574,755	6%	$222	-7%	91	57%	99


Artist's Conceptual Rendering

9900 WEST

BAY HARBOR ISLANDS

Your Bay Harbor Islands Waterfront Retreat Awaits

Nestled along the tranquil waterfront of Bay Harbor Islands, **9900 West** is a boutique residential offering designed for elevated island living, just minutes from Bal Harbour Shops, world-class dining, and Miami's most pristine beaches.

A curated collection of 2 to 4-bedroom residences designed for indoor-outdoor living, featuring expansive terraces, a rooftop pool deck, fitness center, and private marina with boat slips available.

— Move-in Summer 2026 —

Priced from $1.39M

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