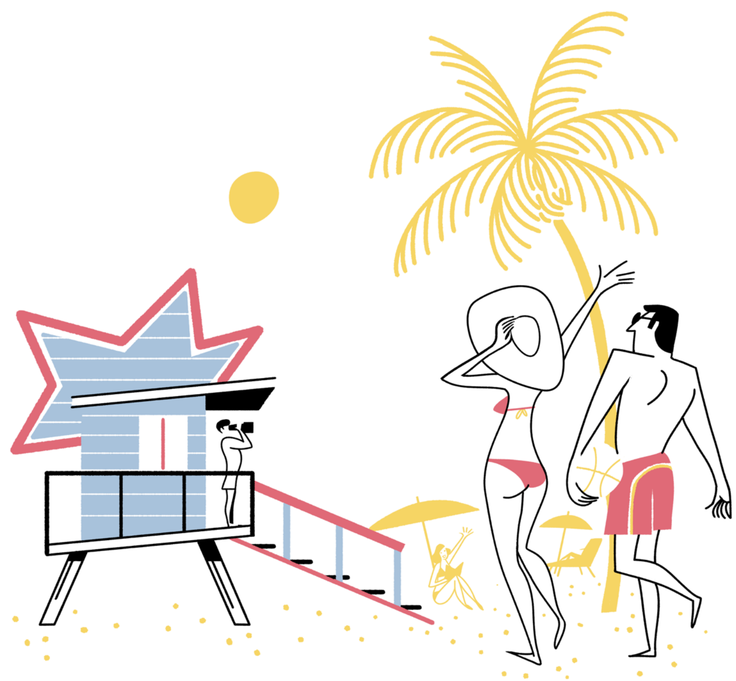
corcoran

The Corcoran Report

4Q | 2025 | COASTAL PALM BEACHES & BARRIER ISLANDS



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Neighborhoods

Jupiter Island to Singer Island

SINGLE FAMILY AVG PRICE	CONDO AVG PRICE	SALES	INVENTORY
$4.8M	$1.2M	188	592
+54%	+3%	+42%	+7%

Town of Palm Beach

SINGLE FAMILY AVG PRICE	CONDO AVG PRICE	SALES	INVENTORY
$16.3M	$1.7M	77	390
+2%	-6%	+17%	-3%

West Palm Beach to Lake Worth Beach

SINGLE FAMILY AVG PRICE	CONDO AVG PRICE	SALES	INVENTORY
$1.3M	$1.1M	267	565
+44%	+29%	+55%	-20%

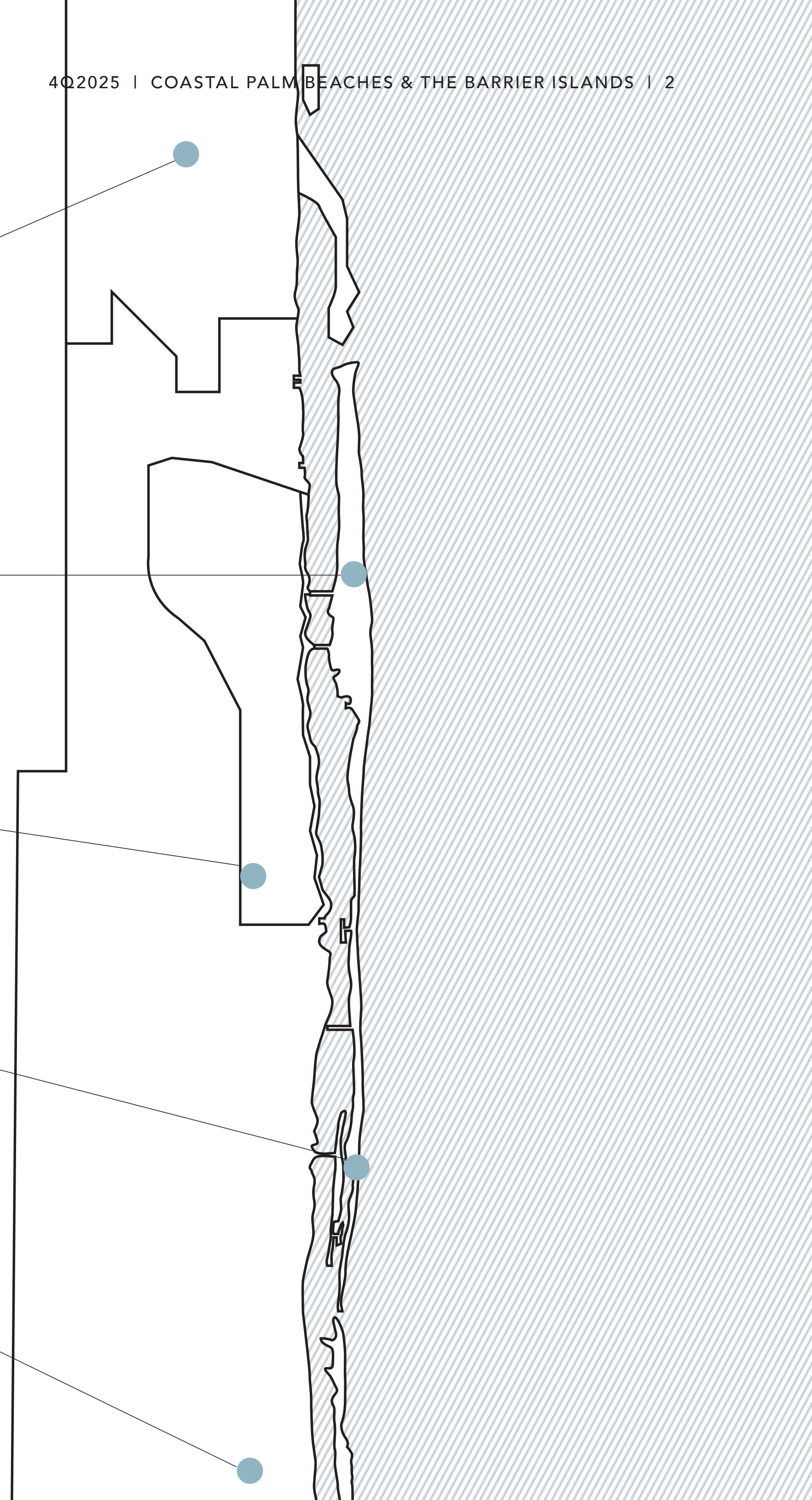
Hypoluxo Island to Highland Beach

SINGLE FAMILY AVG PRICE	CONDO AVG PRICE	SALES	INVENTORY
$9.2M	$1.2M	85	314
+30%	-1%	+16%	0%

Delray Beach

SINGLE FAMILY AVG PRICE	CONDO AVG PRICE	SALES	INVENTORY
$2.3M	$508K	83	233
+11%	+49%	+28%	+2%

% CHANGE (YEAR-OVER-YEAR)



Town of Palm Beach

• In Fourth Quarter 2025, closed sales increased annually for both property types. Condo/co-op sales increased 15% year-over-year, and single-family home sales hit a five-year Fourth Quarter high, up 21%. The annual gain in condo/co-op sales was driven by a double-digit increase in South End closings, while In Town condo/co-op sales remained level versus last year.

• Condo/co-op pricing declined modestly year-over-year. Median price fell 1% to $1.2M, and average price fell 6% to $1.7M. This was the first time since Second Quarter 2024 that both pricing metrics declined annually.

• Single-family pricing metrics increased year-over-year in Fourth Quarter 2025. Median price climbed 37% to $14.3M and average price was up 2% to $16.3M. The annual gains in pricing this quarter were fueled by the top of the market. The number of closings over $15M doubled versus Fourth Quarter 2024.

• As of the end of 2025, condo/co-op listings fell slightly by 6% annually to 290 units. Single-family inventory rose 11% year-over-year to 100 available homes, the fourth consecutive quarter with an annual gain.

Single Family

Sales	Average Sales Price	Median Sales Price	Inventory
23	$16.3M	$14.3M	100
+21% YEAR OVER YEAR	+2% YEAR OVER YEAR	+37% YEAR OVER YEAR	+11% YEAR OVER YEAR

Condo/Co-op

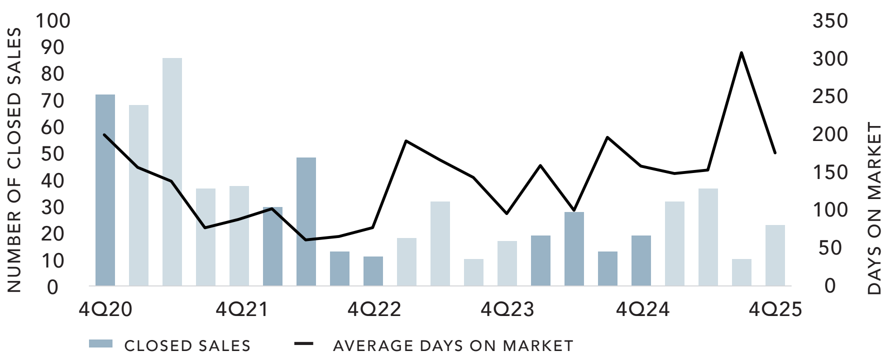
Sales	Average Sales Price	Median Sales Price	Inventory
54	$1.7M	$1.2M	290
+15% YEAR OVER YEAR	-6% YEAR OVER YEAR	-1% YEAR OVER YEAR	-6% YEAR OVER YEAR

Town of Palm Beach by Product Type

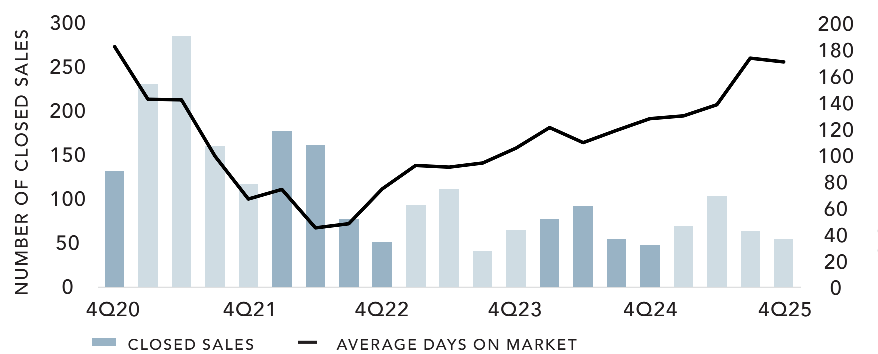
SINGLE FAMILY	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	23	10	+130%	19	+21%
SALES VOLUME	$374M	$214M	+74%	$304M	+23%
DAYS ON MARKET	177	312	-43%	160	+11%
MEDIAN PRICE	$14.3M	$10.0M	+44%	$10.5M	+37%
AVERAGE PRICE	$16.3M	$21.4M	-24%	$16.0M	+2%
INVENTORY	100	72	+39%	90	+11%

CONDO/CO-OP	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	54	63	-14%	47	+15%
SALES VOLUME	$93M	$140M	-33%	$86M	+8%
DAYS ON MARKET	154	156	-2%	115	+34%
MEDIAN PRICE	$1.2M	$1.2M	-1%	$1.2M	-1%
AVERAGE PRICE	$1.7M	$2.2M	-22%	$1.8M	-6%
INVENTORY	290	219	+32%	310	-6%

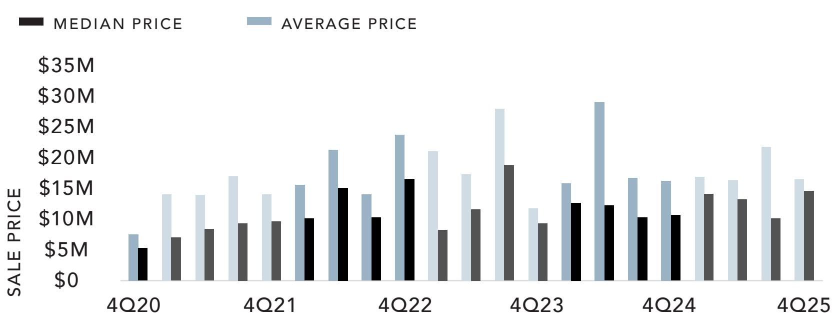
Single Family Closed Sales



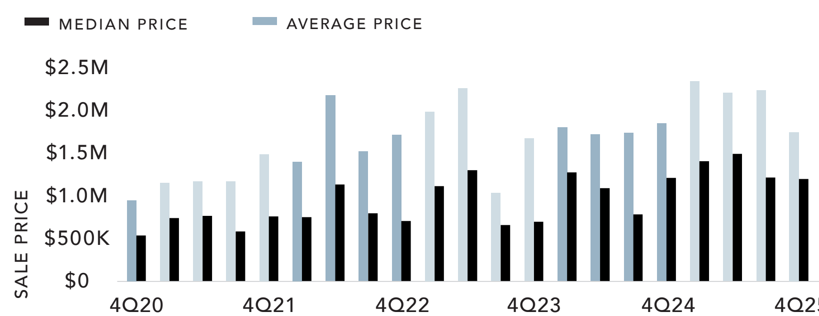
Condo/Co-Op Closed Sales



Single Family Median and Average Price



Condo/Co-Op Median and Average Price



Town of Palm Beach by Neighborhood

Single Family by Neighborhood

NORTH END	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	10	4	+150%	9	+11%
SALES VOLUME	$170M	$67M	+153%	$173M	-2%
DAYS ON MARKET	194	133	+46%	62	+215%
MEDIAN PRICE	$11.1M	$11.2M	-2%	$6.7M	+65%
AVERAGE PRICE	$17.0M	$16.7M	+1%	$19.3M	-12%
INVENTORY	49	36	+36%	44	+11%

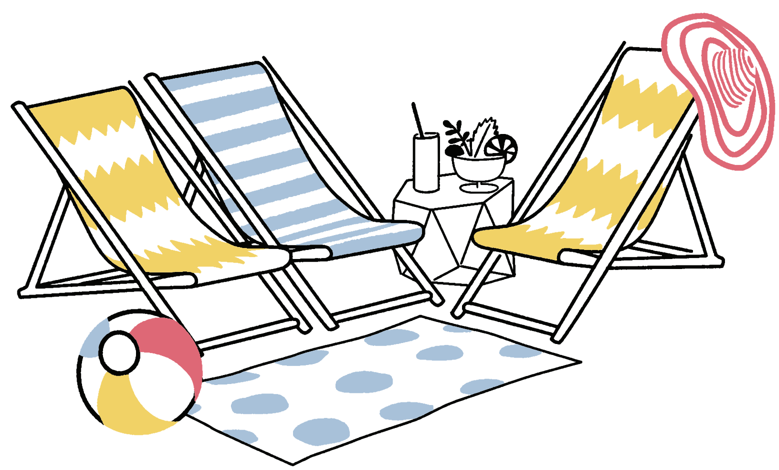
IN TOWN	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	12	5	+140%	9	+33%
SALES VOLUME	$187M	$144M	+30%	$116M	+61%
DAYS ON MARKET	167	492	-66%	135	+23%
MEDIAN PRICE	$13.5M	$10.7M	+26%	$7.9M	+72%
AVERAGE PRICE	$15.6M	$28.7M	-46%	$12.9M	+20%
INVENTORY	24	21	+14%	26	-8%

ESTATE SECTION	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	1	1	0%	1	0%
SALES VOLUME	$18M	$4M	+363%	$14M	+24%
DAYS ON MARKET	130	NA	NA	1,016	-87%
MEDIAN PRICE	$17.7M	$3.8M	+363%	$14.3M	+24%
AVERAGE PRICE	$17.7M	$3.8M	+363%	$14.3M	+24%
INVENTORY	27	15	+80%	20	+35%

Condo/Co-Op by Neighborhood

IN TOWN	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	14	17	-18%	14	0%
SALES VOLUME	$45M	$85M	-47%	$53M	-15%
DAYS ON MARKET	182	134	+35%	138	+32%
MEDIAN PRICE	$2.8M	$3.5M	-20%	$2.2M	+27%
AVERAGE PRICE	$3.2M	$5.0M	-36%	$3.8M	-15%
INVENTORY	86	49	+76%	76	+13%

SOUTH END	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	40	46	-13%	33	+21%
SALES VOLUME	$48M	$54M	-11%	$33M	+47%
DAYS ON MARKET	142	162	-12%	110	+30%
MEDIAN PRICE	$600K	$653K	-8%	$595K	+1%
AVERAGE PRICE	$1.2M	$1.2M	+2%	$995K	+21%
INVENTORY	204	170	+20%	234	-13%



1454 Point Way | $5,450,000 | Web# 100420510

Jupiter Island to Singer Island

• In the Jupiter Island to Singer Island submarket, closed sales climbed by double-digits for both property types, with condo/co-op closings up 27% and single-family home sales jumping 76%. The double-digit increase in single-family closings was driven by an influx of luxury sales, as transactions priced above $3M more than doubled year-over-year.

• Condo/co-op median price dropped 22% year-over-year to $834K, while average price rose 3% to $1.2M. The annual decline in median price was a result of a 10% gain in the market share of sales below $1M this quarter compared to the same period a year ago.

• Single-family pricing metrics posted year-over-year gains in Fourth Quarter 2025. Median price climbed 33% to $1.7M and average price ballooned to a record-high, up 54% to $4.8M. The year-over-year gains in pricing this quarter were fueled by a greater number of closings commanding over $10M. Additionally, this quarter saw North Palm Beach's highest priced sale of 2025—11465 Old Harbour Road closing for $97.5M.

• Jupiter Island to Singer Island listed inventory continued its build up as both product types saw annual increases for the ninth consecutive quarter. Condo/co-op inventory increased 9% year-over-year to 475 active listings and single-family inventory rose 2% to 117 listings as of the end of the year.

Single Family

Sales	Average Sales Price	Median Sales Price	Inventory
74	$4.8M	$1.7M	117
+76% YEAR OVER YEAR	+54% YEAR OVER YEAR	+33% YEAR OVER YEAR	+2% YEAR OVER YEAR

Condo/Co-op

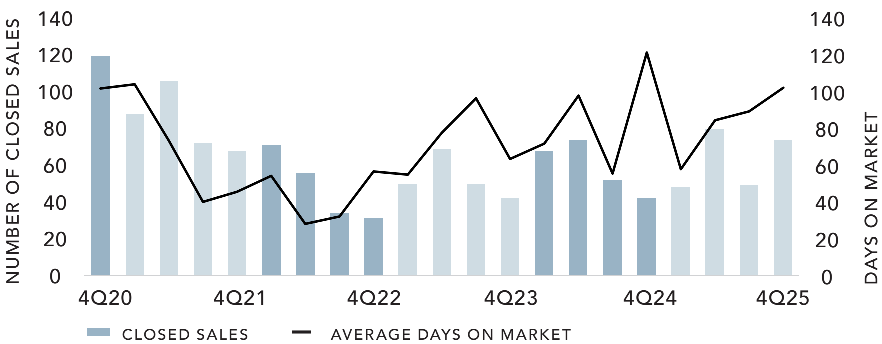
Sales	Average Sales Price	Median Sales Price	Inventory
114	$1.2M	$834K	475
+27% YEAR OVER YEAR	+3% YEAR OVER YEAR	-22% YEAR OVER YEAR	+9% YEAR OVER YEAR

Jupiter Island to Singer Island by Product Type

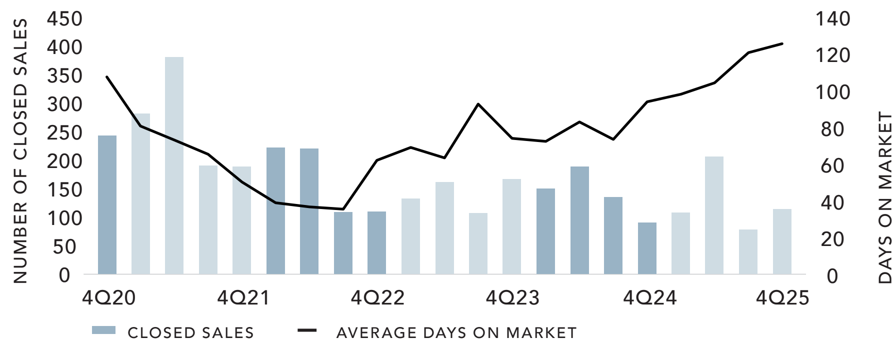
SINGLE FAMILY	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	74	49	+51%	42	+76%
SALES VOLUME	$356M	$129M	+175%	$131M	+171%
DAYS ON MARKET	103	90	+15%	122	-16%
MEDIAN PRICE	$1.7M	$1.6M	+2%	$1.3M	+33%
AVERAGE PRICE	$4.8M	$2.6M	+82%	$3.1M	+54%
INVENTORY	117	112	+4%	115	+2%

CONDO/CO-OP	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	114	78	+46%	90	+27%
SALES VOLUME	$134M	$78M	+72%	$102M	+31%
DAYS ON MARKET	126	121	+4%	94	+34%
MEDIAN PRICE	$834K	$573K	+46%	$1.1M	-22%
AVERAGE PRICE	$1.2M	$995K	+18%	$1.1M	+3%
INVENTORY	475	408	+16%	436	+9%

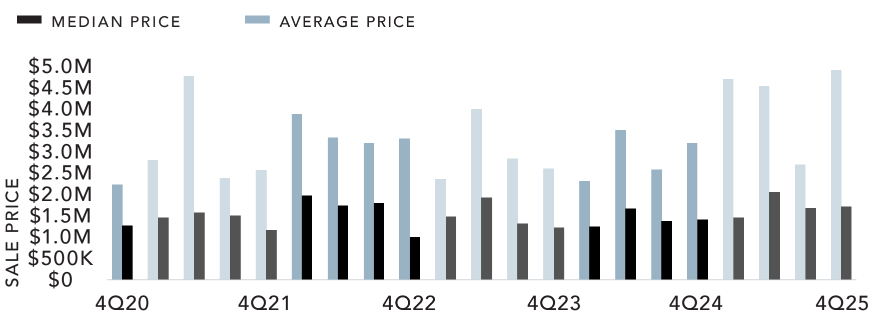
Single Family Closed Sales



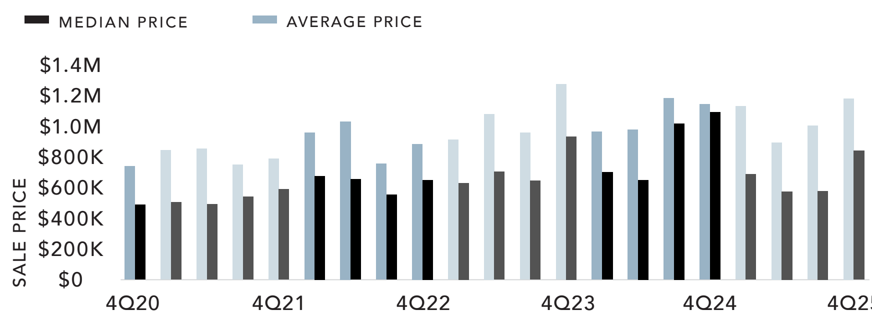
Condo/Co-Op Closed Sales

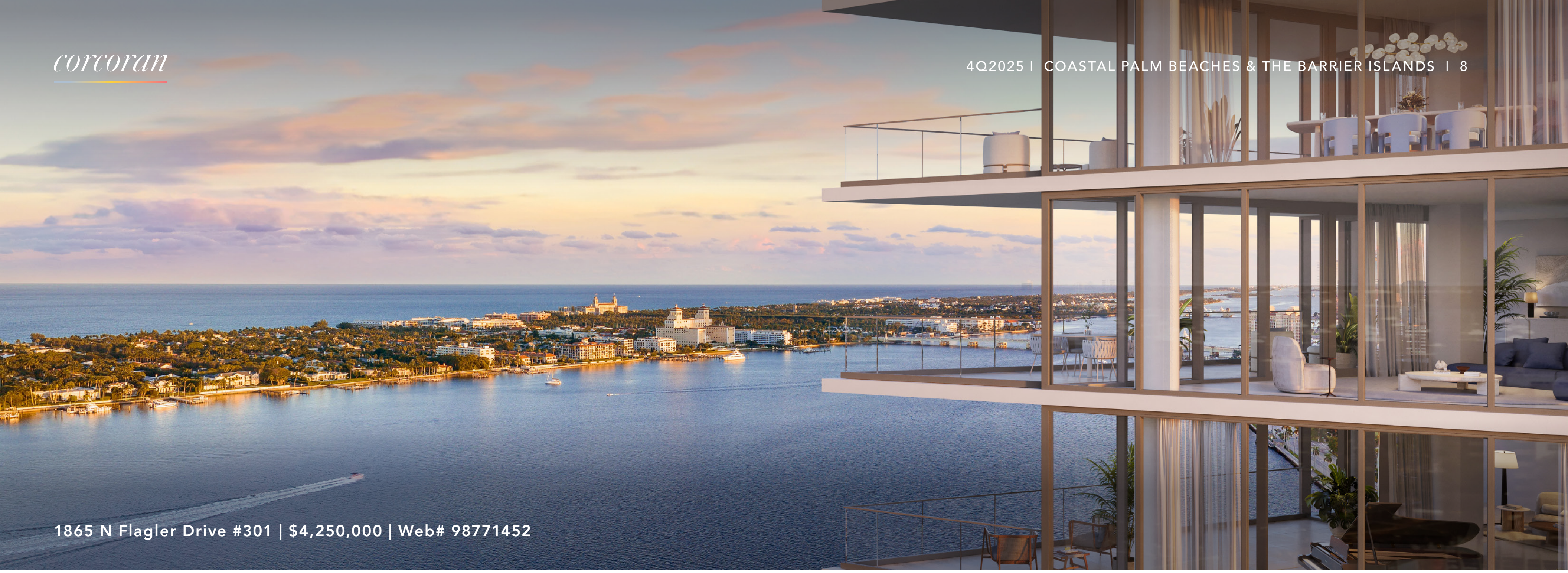


Single Family Median and Average Price



Condo/Co-Op Median and Average Price





West Palm Beach to Lake Worth Beach

• In the area from West Palm Beach to Lake Worth, both product types posted double-digit annual gains in closings for the second consecutive quarter. Single-family home sales rose 45%, and condo/co-op transactions spiked 77% year-over-year. In particular, condo/co-op closings posted their second largest annual percentage gain in five years, thanks to both new development and resale condominium closings along Flagler Drive.

• Single-family price figures increased year-over-year. Median price climbed 8% to $658K, and average price jumped 44% to $1.3M, due to a notable rise in high-priced sales. This quarter saw six times the number of closings above $3M versus a year ago.

• Condo/co-op pricing metrics varied this quarter. Median price declined 5% year-over-year to $462K. However, average price increased 29% to $1.1M, fueled by a sixfold increase in the number of sales above $5M, spurred by new development sales at Forté on Flagler. Additionally, this quarter saw two closings above $10M, compared to none above this price in Fourth Quarter 2024.

• At the end of December, single-family inventory dropped 15% year-over-year, and condo/co-op listings fell 24% annually. Despite the annual decline, single-family and condo/co-op inventory have each remained above 250 active listings for over two years.

Single Family

Sales	Average Sales Price	Median Sales Price	Inventory
168	$1.3M	$658K	293
+45% YEAR OVER YEAR	+44% YEAR OVER YEAR	+8% YEAR OVER YEAR	-15% YEAR OVER YEAR

Condo/Co-op

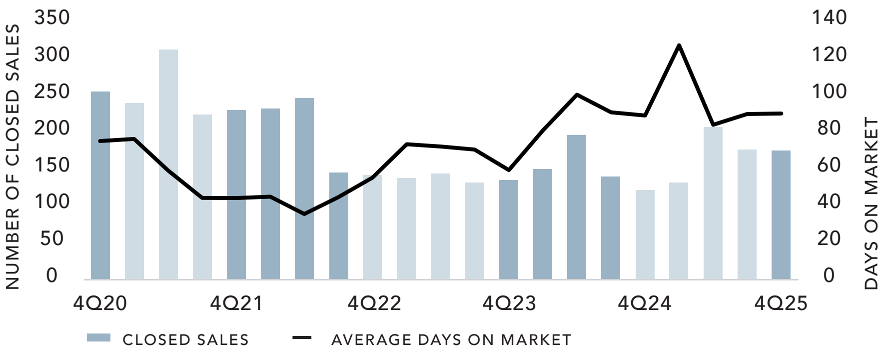
Sales	Average Sales Price	Median Sales Price	Inventory
99	$1.1M	$462K	272
+77% YEAR OVER YEAR	+29% YEAR OVER YEAR	-5% YEAR OVER YEAR	-24% YEAR OVER YEAR

West Palm Beach to Lake Worth Beach by Product Type

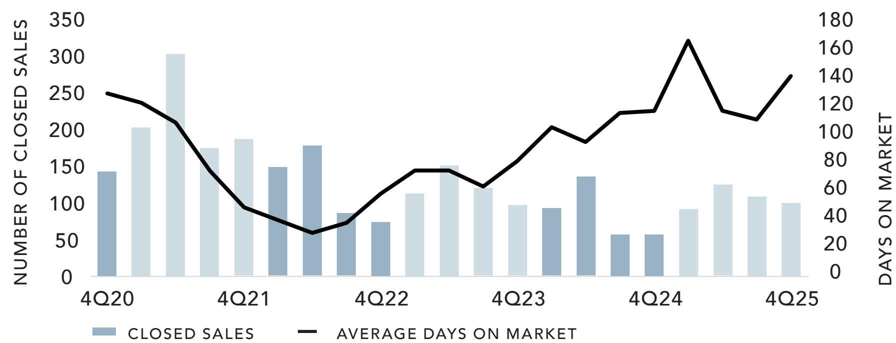
SINGLE FAMILY	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	168	169	-1%	116	+45%
SALES VOLUME	$222M	$187M	+18%	$106M	+109%
DAYS ON MARKET	87	86	0%	86	+1%
MEDIAN PRICE	$658K	$550K	+20%	$610K	+8%
AVERAGE PRICE	$1.3M	$1.1M	+19%	$915K	+44%
INVENTORY	293	287	+2%	346	-15%

CONDO/CO-OP	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	99	108	-8%	56	+77%
SALES VOLUME	$113M	$339M	-67%	$49M	+129%
DAYS ON MARKET	141	110	+28%	116	+21%
MEDIAN PRICE	$462K	$872K	-47%	$487K	-5%
AVERAGE PRICE	$1.1M	$3.1M	-64%	$881K	+29%
INVENTORY	272	274	-1%	356	-24%

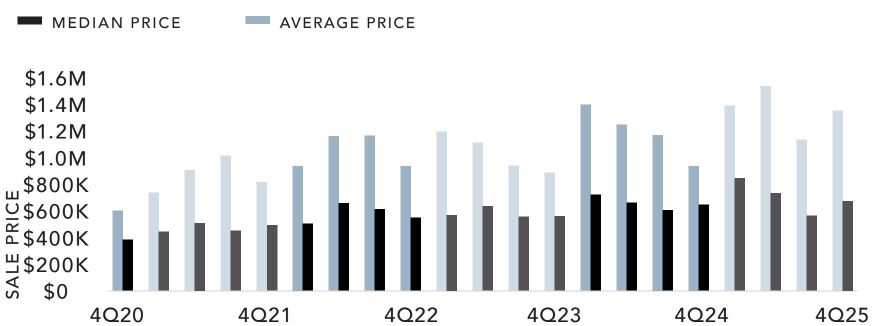
Single Family Closed Sales



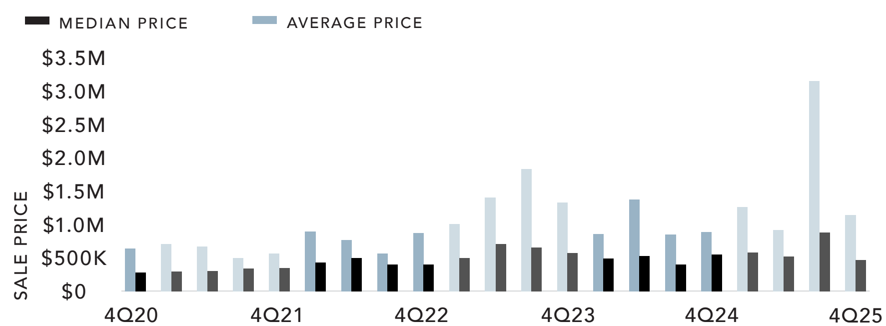
Condo/Co-Op Closed Sales



Single Family Median and Average Price



Condo/Co-Op Median and Average Price



530 Old School Road | $13,995,000 | Web# 101036988

Hypoluxo Island to Highland Beach

• In the region spanning from Hypoluxo Island to Highland Beach, both product types displayed annual increases in closings. Single-family home sales spiked 61%, and condo/co-op sales rose 2% versus Fourth Quarter 2024. The surge in single-family closings was driven by double the number of closings above $3M compared to last year.

• In Fourth Quarter 2025, single-family prices rose sharply year-over-year. Median price jumped 58% to $3.3M, and average price was up 30% to $9.2M, fueled by more than double the number of closings above $5M in addition to triple the number of closings over $30M versus the same period a year ago.

• Condo/co-op pricing metrics varied this quarter. Median price climbed 25% year-over-year to $1.0M, while average price declined 1% to $1.2M. Median price rose annually due to a combination of a 5% uptick in the market share of closings over $1M and a near 10% drop in the share of sales under $1M.

• As of the end of the year, condo/co-op listed inventory increased slightly by 1% year-over-year to 235 units and remained above 200 active listings for the fifth consecutive quarter. Single-family inventory fell 4% annually to 79 available homes.

Single Family

Sales	Average Sales Price	Median Sales Price	Inventory
29	$9.2M	$3.3M	79
+61% YEAR OVER YEAR	+30% YEAR OVER YEAR	+58% YEAR OVER YEAR	-4% YEAR OVER YEAR

Condo/Co-op

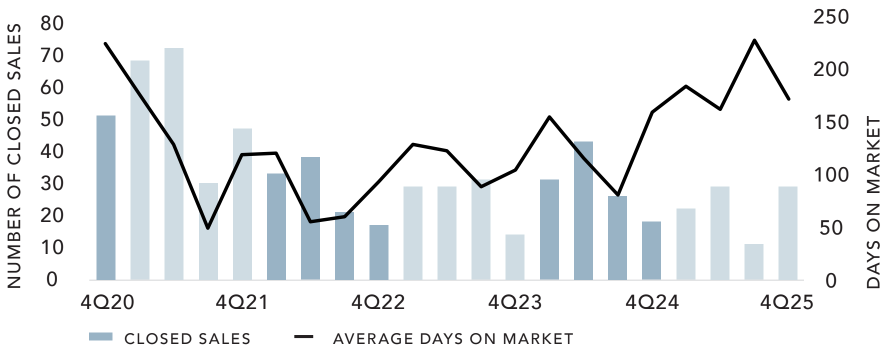
Sales	Average Sales Price	Median Sales Price	Inventory
56	$1.2M	$1.0M	235
+2% YEAR OVER YEAR	-1% YEAR OVER YEAR	+25% YEAR OVER YEAR	+1% YEAR OVER YEAR

Hypoluxo Island to Highland Beach by Product Type

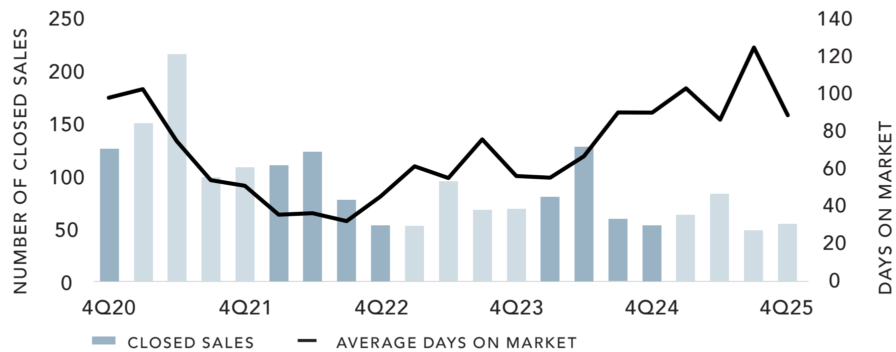
SINGLE FAMILY	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	29	11	+164%	18	+61%
SALES VOLUME	$267M	$114M	+134%	$128M	+109%
DAYS ON MARKET	140	186	-25%	130	+8%
MEDIAN PRICE	$3.3M	$7.2M	-55%	$2.1M	+58%
AVERAGE PRICE	$9.2M	$10.4M	-11%	$7.1M	+30%
INVENTORY	79	45	+76%	82	-4%

CONDO/CO-OP	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	56	50	+12%	55	+2%
SALES VOLUME	$67M	$57M	+17%	$67M	+1%
DAYS ON MARKET	104	147	-29%	106	-2%
MEDIAN PRICE	$1.0M	$980K	+5%	$820K	+25%
AVERAGE PRICE	$1.2M	$1.1M	+5%	$1.2M	-1%
INVENTORY	235	203	+16%	232	+1%

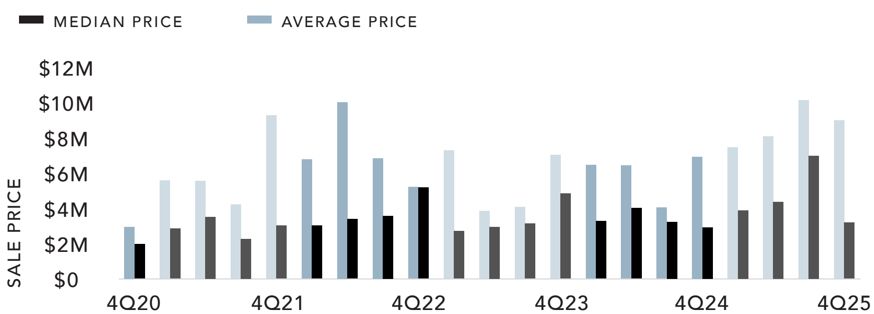
Single Family Closed Sales



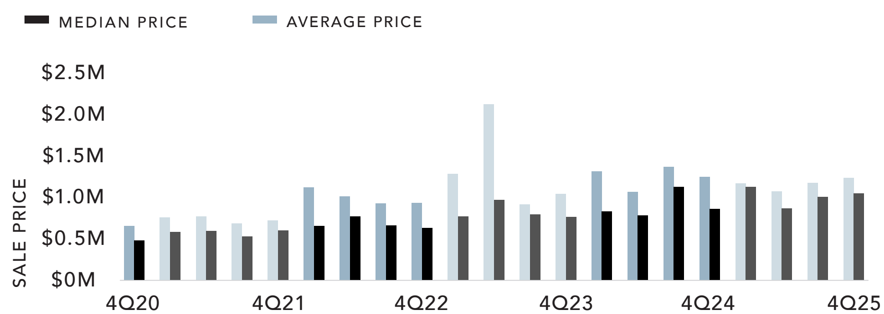
Condo/Co-Op Closed Sales



Single Family Median and Average Price



Condo/Co-Op Median and Average Price



Delray Beach

• Delray Beach closed sales increased by double-digits across both product types. Single-family home sales climbed 30% annually and condo/co-op sales rose 22% year-over-year.

• Single-family pricing metrics rose year-over-year this quarter, with average price up 11% and median increasing 76%. Closings over $1M rose nearly 60% year-over-year, driving the annual gain.

• Condo/co-op pricing metrics increased year-over-year in Fourth Quarter 2025. Median price rose 33% year-over-year to $426K and average price increased 49% to $508K. Pricing metrics rose this quarter due to a 14% rise in the share of closings above $1M coupled with a 10% decline in the share of sales below $1M.

• At the end of December, condo/co-op listings climbed 17% annually. Single-family inventory dropped 4% year-over-year, marking the first decline after three consecutive quarters of double-digit annual gains.

Single Family

Sales	Average Sales Price	Median Sales Price	Inventory
61	$2.3M	$1.9M	152
+30% YEAR OVER YEAR	+11% YEAR OVER YEAR	+76% YEAR OVER YEAR	-4% YEAR OVER YEAR

Condo/Co-op

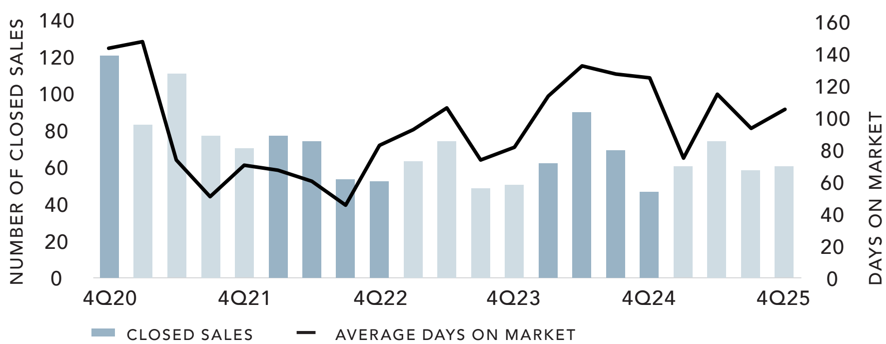
Sales	Average Sales Price	Median Sales Price	Inventory
22	$508K	$426K	81
+22% YEAR OVER YEAR	+49% YEAR OVER YEAR	+33% YEAR OVER YEAR	+17% YEAR OVER YEAR

Delray Beach by Product Type

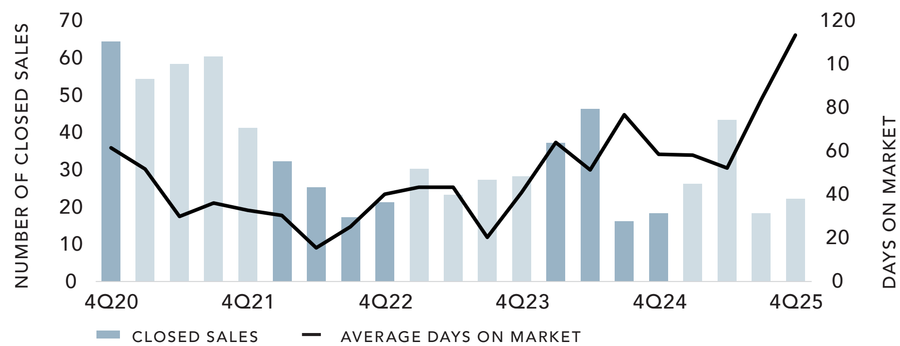
SINGLE FAMILY	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	61	59	+3%	47	+30%
SALES VOLUME	$143M	$141M	+2%	$100M	+44%
DAYS ON MARKET	93	82	+13%	110	-16%
MEDIAN PRICE	$1.9M	$1.8M	+6%	$1.1M	+76%
AVERAGE PRICE	$2.3M	$2.4M	-1%	$2.1M	+11%
INVENTORY	152	156	-3%	159	-4%

CONDO/CO-OP	4Q25	3Q25	%CHG(QTR)	4Q24	%CHG(YR)
CLOSED SALES	22	18	+22%	18	+22%
SALES VOLUME	$11M	$9M	+31%	$6M	+82%
DAYS ON MARKET	151	111	+36%	77	+95%
MEDIAN PRICE	$426K	$465K	-8%	$320K	+33%
AVERAGE PRICE	$508K	$474K	+7%	$341K	+49%
INVENTORY	81	78	+4%	69	+17%

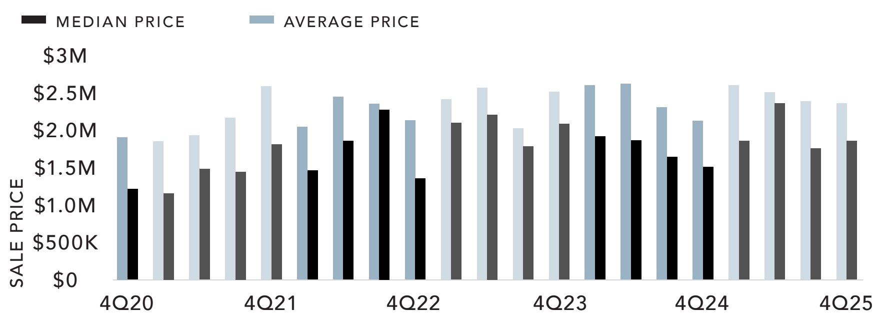
Single Family Closed Sales



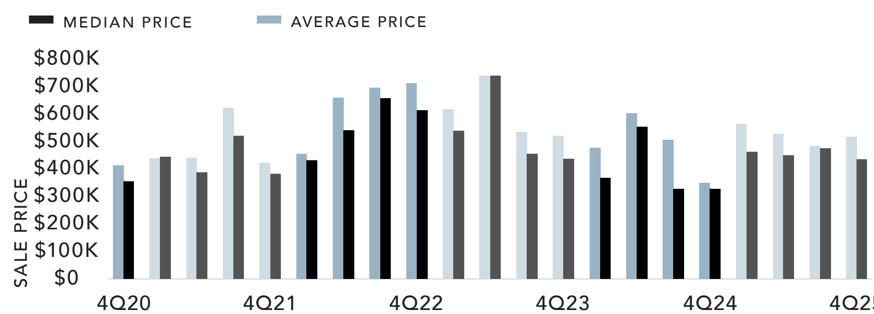
Condo/Co-Op Closed Sales



Single Family Median and Average Price



Condo/Co-Op Median and Average Price



1208 Lake Avenue | $1,290,000 | Web# 101565960

Townhouse

- Townhouse sales across all Coastal Palm Beaches and Barrier Island submarkets jumped by 56% year-over-year.

- Along with the double-digit gain in sales, closed sales volume surged 84% annually, driven by a fivefold increase in luxury sales priced over $5M.

- Median sale price fell 1% year-over-year, and average price rose 18% versus Fourth Quarter 2024. The annual gain in average price this quarter was fueled by a transaction for $12M on Palm Beach Island. By comparison, there were no townhouse sales over $10M during Fourth Quarter 2024.

- At the end of the quarter, prospective townhouse buyers had a selection of 145 homes available, down 22% from a year ago. This quarter saw the largest annual percentage decline in townhouse listings since 2023.

% CHANGE (QUARTER) % CHANGE (YEAR-OVER-YEAR)

TOWNHOUSE ALL AREAS

	4Q25	Change (Quarter)	3Q25	Change (Year-over-Year)	4Q24
CLOSED SALES	61	+17%	52	+56%	39
CLOSED SALES VOLUME	$99M	+28%	$77M	+84%	$53M
AVERAGE DAYS ON MARKET	117	+5%	110	+28%	91
MEDIAN PRICE	$770K	+7%	$720K	-1%	$780K
AVERAGE PRICE	$1.6M	+9%	$1.5M	+18%	$1.4M
INVENTORY	145	+7%	136	-22%	186

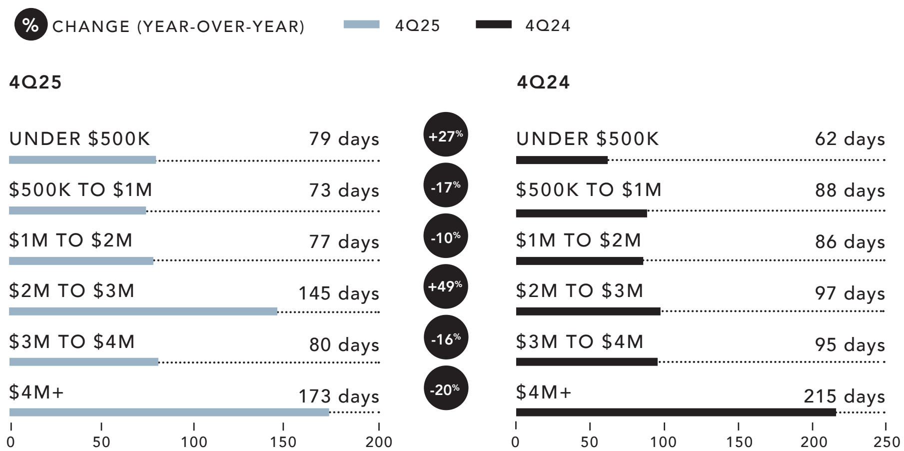
Coastal Palm Beaches & Barrier Islands All Areas

Single Family Days on Market and Market Share

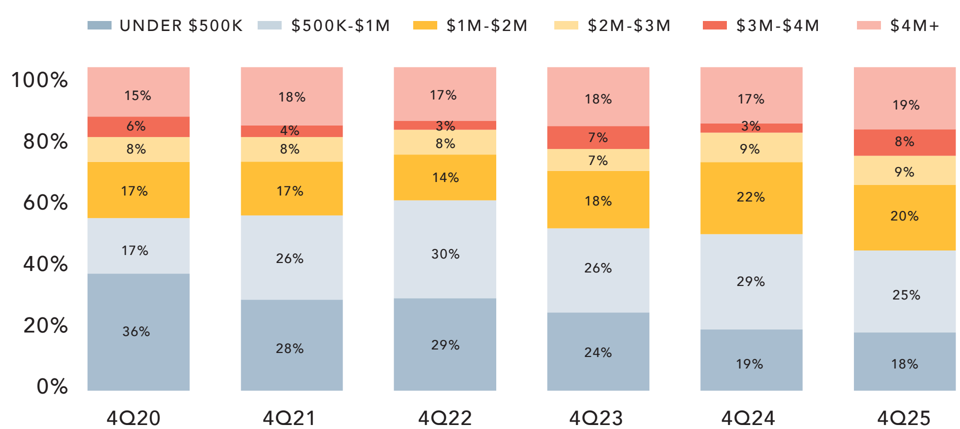
• Single-family average days on market fell annually for all price ranges except for the $2M to $3M segment, which rose 49% to 145 days on average, and the under $500K segment, which increased 27% to 79 days on average.

• The market share of single-family sales above $4M rose 2% year-over-year and the market between $3M and $4M increased 5% annually.

Days on Market by Price Range



Market Share by Price Range

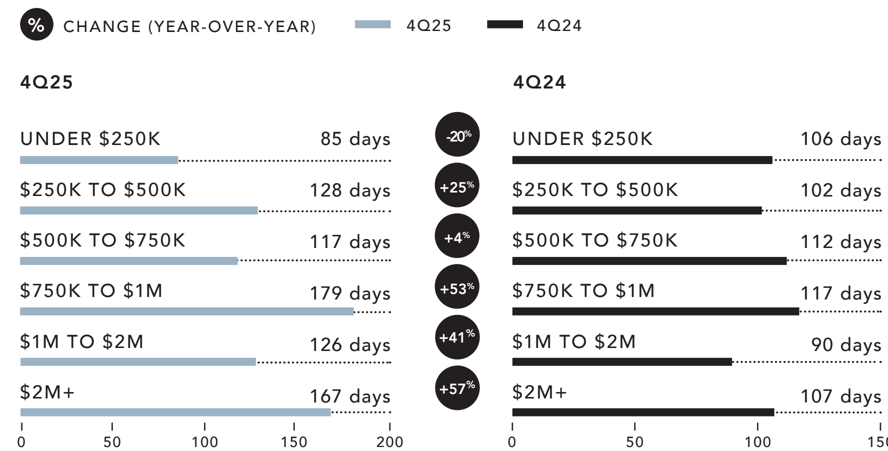


Condo/Co-op Days on Market and Market Share

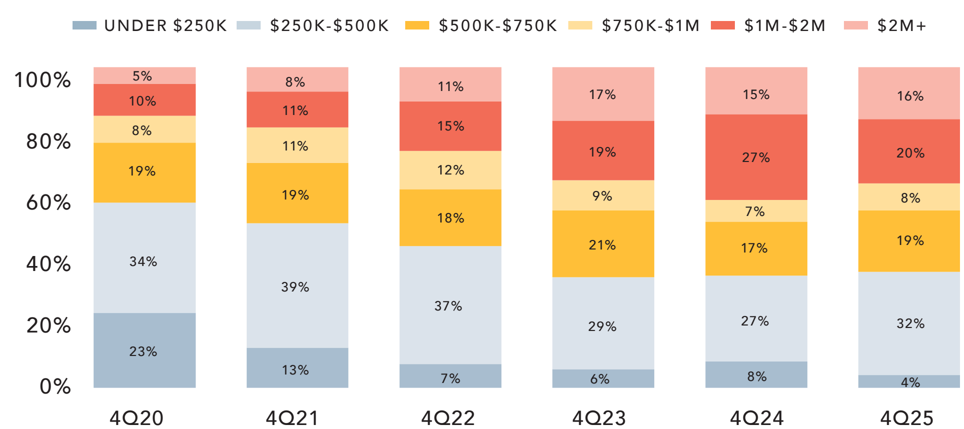
• Condo/co-op days on market experienced annual increases for all price ranges except for the under $250K segment, which fell by 20% to 85 days on average. Days on market over $2M experienced the largest annual increase, up over 50% year-over-year.

• The market share of condo/co-op sales from $1M to $2M fell 7% year-over-year but the share of closings between $250K and $500K rose 5% annually.

Days on Market by Price Range



Market Share by Price Range



Methodology

Figures are based on closings reported in the Palm Beach PBB and Beaches Multiple Listing Services, in addition to sales recorded by the Palm Beach County Property Appraiser's office within the Town of Palm Beach at the time the report is prepared.

Median Price is the middle or midpoint price where half of sales fall below and half fall above this number.

Days on Market averages how long a unit takes to sell and is calculated by subtracting contract date from list date. Units on the market longer than three years and shorter than one day are considered outliers and removed from the data to prevent significant skewing.

Inventory is a count of all currently listed units in each neighborhood and is measured at the end of each quarter.

West Palm Beach to Lake Worth section includes areas spanning from the Intracoastal Waterway to Interstate 95.

Delray Beach section includes areas spanning from the Intracoastal Waterway to Interstate 95.

MLS Area Codes used in the report:

Palm Beach - 5001, 5002, 5003, 5004

Jupiter to Singer Island - 5030, 5080, 5220, 5240, 5250

Hypoluxo Island to Highland - 4110, 4120, 4130, 4140, 4150, 4200

West Palm Beach to Lake Worth Beach - 5420, 5440, 5600, 5430, 5610

Delray Beach - 4360, 4220, 4460, 4230, 4180

Townhouse – All Areas listed above

DISCLAIMER

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