

Elliman Report

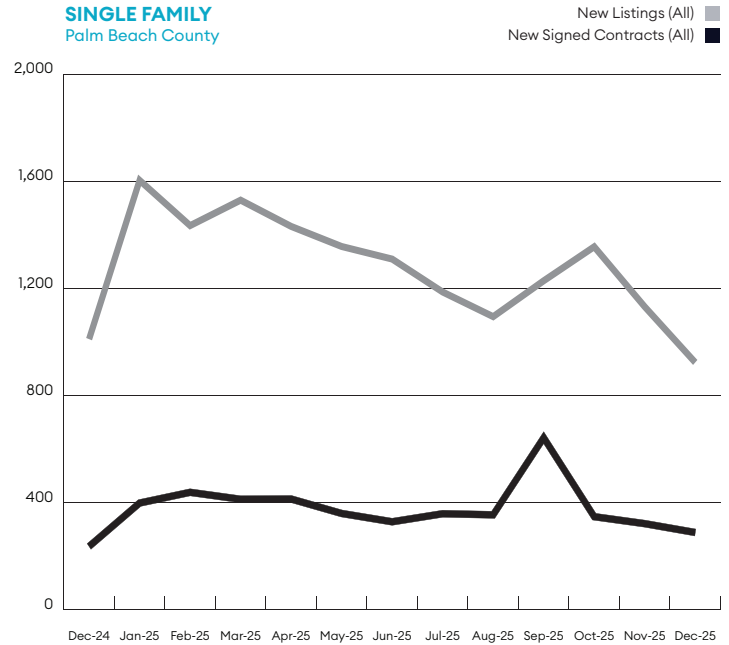
Florida

December 2025 New Signed Contracts

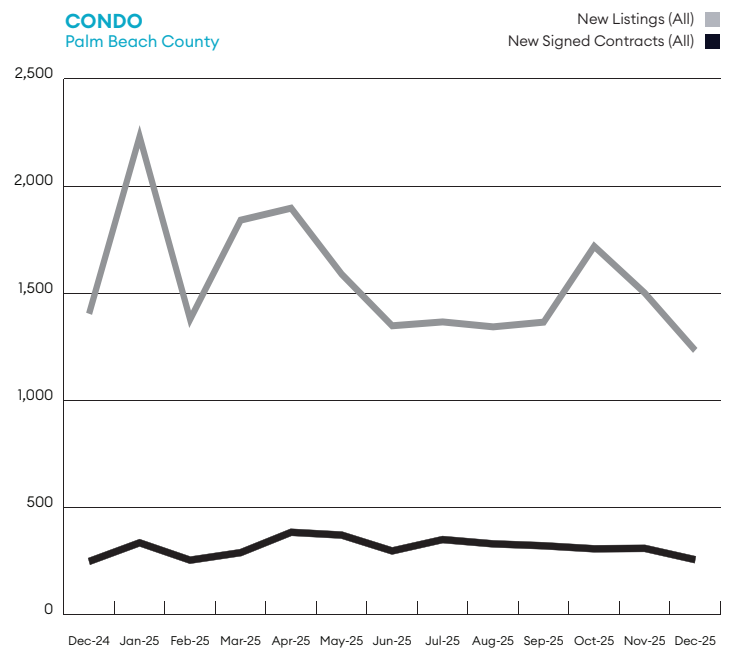
Palm Beach County

"Since last April, new signed contracts have risen annually for single families and condos. New listings across all property types combined fell annually for the second time in four months. The number of new contracts signed above the \$1 million threshold has shown significant year over year gains beginning last summer."

SINGLE FAMILY MATRIX Palm Beach County	DEC 2025	DEC 2024	%Δ (YR)
New Signed Contracts (All)	288	236	22.0%
< \$300K	9	8	12.5%
\$300K - \$399K	15	16	-6.3%
\$400K - \$499K	31	31	0.0%
\$500K - \$999K	104	99	5.1%
\$1M - \$2.99M	88	63	39.7%
\$3M - \$4.99M	15	7	114.3%
\$5M - \$9.99M	15	4	275.0%
≥ \$10M	11	8	37.5%
New Listings (All)	923	1,010	-8.6%
< \$300K	22	20	10.0%
\$300K - \$399K	51	40	27.5%
\$400K - \$499K	70	123	-43.1%
\$500K - \$999K	409	486	-15.8%
\$1M - \$2.99M	222	214	3.7%
\$3M - \$4.99M	68	44	54.5%
\$5M - \$9.99M	41	48	-14.6%
≥ \$10M	40	35	14.3%



CONDO MATRIX Palm Beach County	DEC 2025	DEC 2024	%Δ (YR)
New Signed Contracts (All)	256	248	3.2%
< \$200K	66	53	24.5%
\$200K - \$299K	45	62	-27.4%
\$300K - \$399K	46	39	17.9%
\$400K - \$599K	33	33	0.0%
\$600K - \$999K	18	26	-30.8%
\$1M - \$2.99M	33	23	43.5%
\$3M - \$4.99M	8	8	0.0%
≥ \$5M	7	4	75.0%
New Listings (All)	1,233	1,404	-12.2%
< \$200K	333	339	-1.8%
\$200K - \$299K	256	288	-11.1%
\$300K - \$399K	210	242	-13.2%
\$400K - \$599K	177	217	-18.4%
\$600K - \$999K	98	150	-34.7%
\$1M - \$2.99M	115	122	-5.7%
\$3M - \$4.99M	26	27	-3.7%
≥ \$5M	18	19	-5.3%

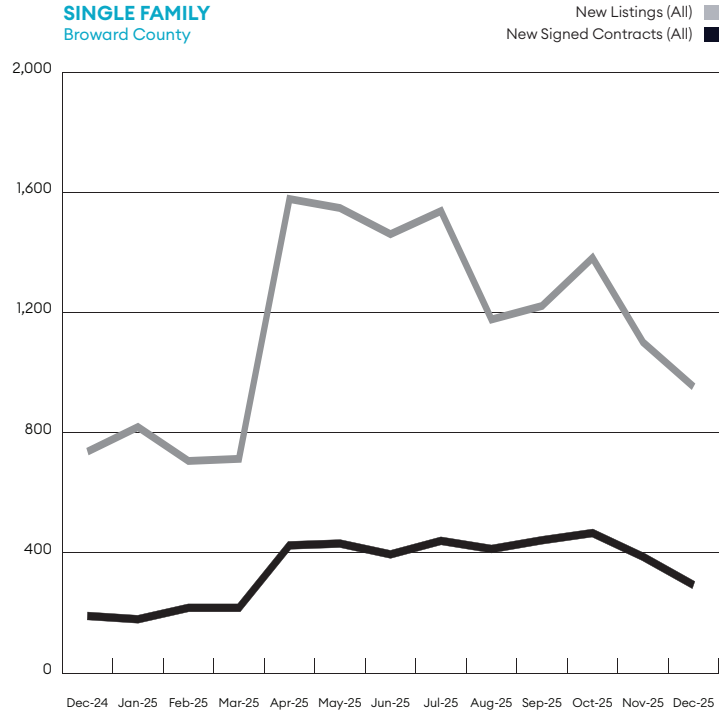


Source: BeachesMLS

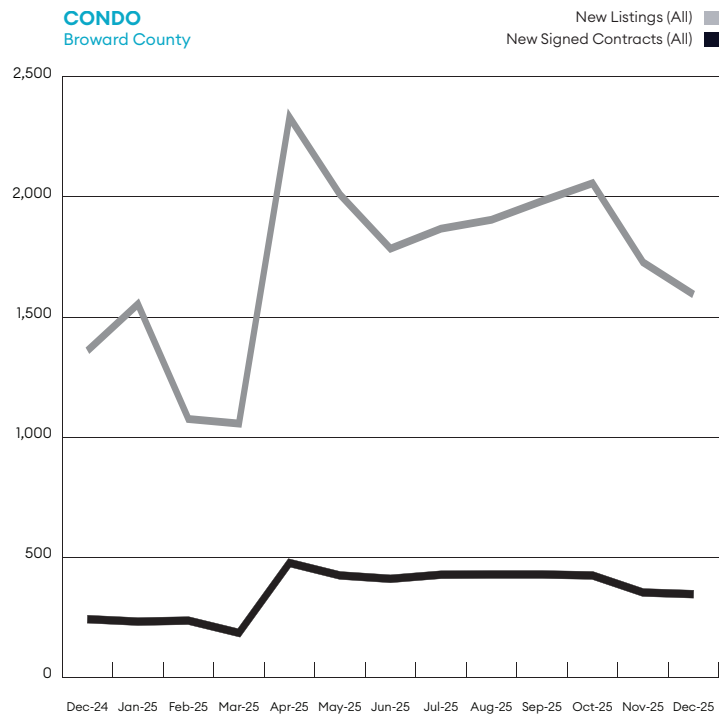
Broward County

"New signed contracts surged annually over the past four months, finally outpacing the growth observed in Palm Beach County to the north. New listings have grown more slowly than new signed contracts since the early fall. The rise in new contracts signed above the \$1 million threshold continued to outpace the overall market."

SINGLE FAMILY MATRIX Broward County	DEC 2025	DEC 2024	%Δ (YR)
New Signed Contracts (All)	293	190	54.2%
< \$300K	10	7	42.9%
\$300K - \$399K	35	18	94.4%
\$400K - \$499K	56	36	55.6%
\$500K - \$999K	132	88	50.0%
\$1M - \$2.99M	46	32	43.8%
\$3M - \$4.99M	11	5	120.0%
\$5M - \$9.99M	3	3	0.0%
≥ \$10M	0	1	-100.0%
New Listings (All)	953	737	29.3%
< \$300K	13	9	44.4%
\$300K - \$399K	83	51	62.7%
\$400K - \$499K	150	95	57.9%
\$500K - \$999K	479	364	31.6%
\$1M - \$2.99M	170	172	-1.2%
\$3M - \$4.99M	33	18	83.3%
\$5M - \$9.99M	19	19	0.0%
≥ \$10M	6	9	-33.3%



CONDO MATRIX Broward County	DEC 2025	DEC 2024	%Δ (YR)
New Signed Contracts (All)	347	243	42.8%
< \$200K	132	91	45.1%
\$200K - \$299K	75	51	47.1%
\$300K - \$399K	46	34	35.3%
\$400K - \$599K	48	36	33.3%
\$600K - \$999K	22	17	29.4%
\$1M - \$2.99M	19	11	72.7%
\$3M - \$4.99M	4	3	33.3%
≥ \$5M	1	0	
New Listings (All)	1,594	1,360	17.2%
< \$200K	532	396	34.3%
\$200K - \$299K	380	326	16.6%
\$300K - \$399K	236	204	15.7%
\$400K - \$599K	229	225	1.8%
\$600K - \$999K	112	120	-6.7%
\$1M - \$2.99M	78	77	1.3%
\$3M - \$4.99M	23	11	109.1%
≥ \$5M	4	1	300.0%

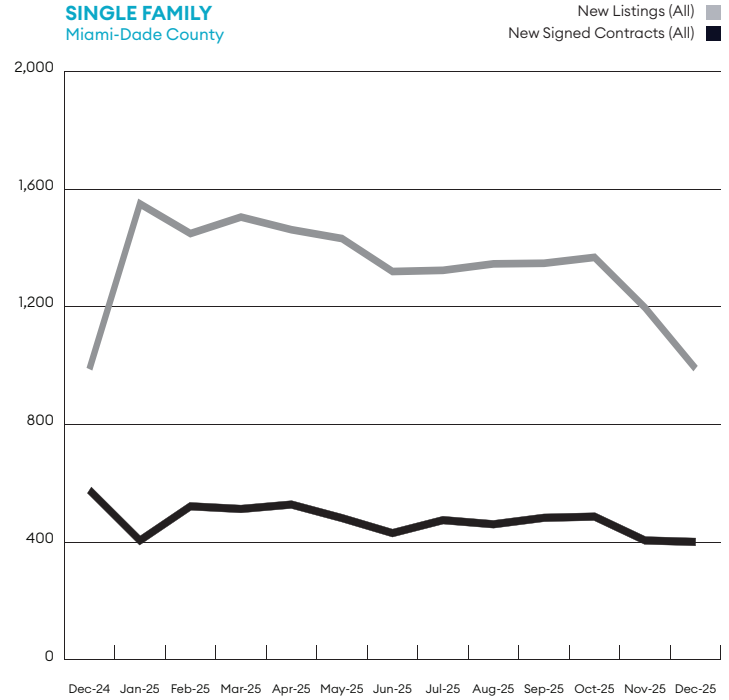


Source: BeachesMLS

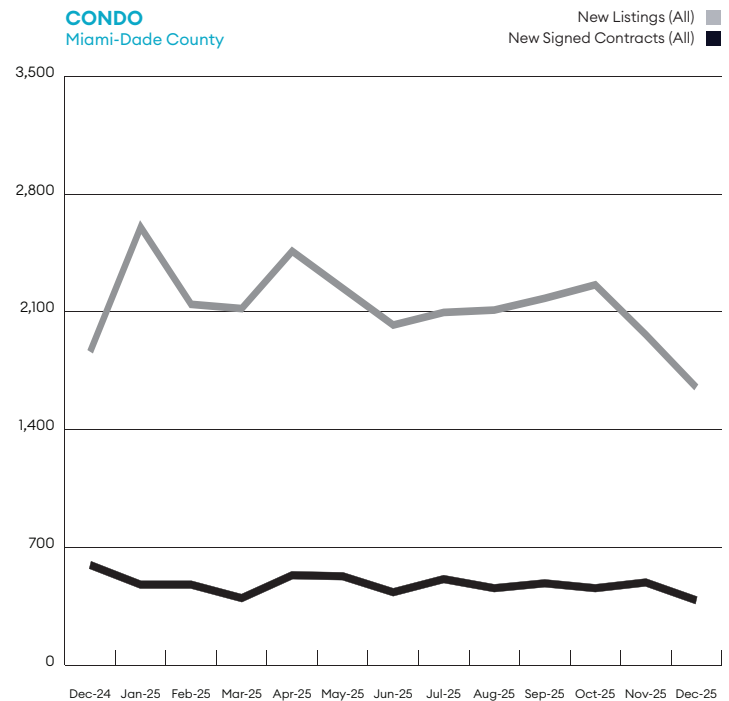
Miami-Dade County

"Over the past 12 months, new signed contracts across both property types have declined, with significantly more weakness at the sub-\$1 million price threshold. The submarket for condos above the \$1 million threshold saw only a modest annual decline in contract signings. New listings for single families showed stability, while new listings for condos declined for the first time since August."

SINGLE FAMILY MATRIX Miami-Dade County	DEC 2025	DEC 2024	%Δ (YR)
New Signed Contracts (All)	401	577	-30.5%
< \$300K	16	9	77.8%
\$300K - \$399K	20	48	-58.3%
\$400K - \$499K	55	72	-23.6%
\$500K - \$999K	192	304	-36.8%
\$1M - \$2.99M	78	99	-21.2%
\$3M - \$4.99M	15	15	0.0%
\$5M - \$9.99M	13	15	-13.3%
≥ \$10M	12	15	-20.0%
New Listings (All)	990	988	0.2%
< \$300K	2	10	-80.0%
\$300K - \$399K	27	29	-6.9%
\$400K - \$499K	87	84	3.6%
\$500K - \$999K	567	535	6.0%
\$1M - \$2.99M	190	214	-11.2%
\$3M - \$4.99M	44	52	-15.4%
\$5M - \$9.99M	43	34	26.5%
≥ \$10M	30	30	0.0%



CONDO MATRIX Miami-Dade County	DEC 2025	DEC 2024	%Δ (YR)
New Signed Contracts (All)	385	595	-35.3%
< \$200K	35	61	-42.6%
\$200K - \$299K	82	128	-35.9%
\$300K - \$399K	69	113	-38.9%
\$400K - \$599K	78	103	-24.3%
\$600K - \$999K	38	101	-62.4%
\$1M - \$2.99M	64	61	4.9%
\$3M - \$4.99M	11	21	-47.6%
≥ \$5M	8	7	14.3%
New Listings (All)	1,651	1,863	-11.4%
< \$200K	113	80	41.3%
\$200K - \$299K	240	284	-15.5%
\$300K - \$399K	259	335	-22.7%
\$400K - \$599K	422	478	-11.7%
\$600K - \$999K	295	301	-2.0%
\$1M - \$2.99M	218	265	-17.7%
\$3M - \$4.99M	47	66	-28.8%
≥ \$5M	57	54	5.6%



Source: Miami Association of REALTORS, INC. MLS

Questions or comments? Email report author
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Methodology: millersamuel.com/research-reports/methodology

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