



BIRCH
PROPERTIES

2025 Year in Review

Residential Real Estate Market | The Berkshires (North, Mid and South County)

2025 rewarded preparation and precision. Inventory expanded across the Berkshires, buyer choice improved, and both total sales and dollar volume increased year over year. At the same time, sellers faced a more discerning market—pricing accuracy, presentation quality, and a clear value narrative mattered more than ever.

Our report summarizes 2025 performance by county and outlines practical strategies to apply these signals in 2026.

Summary

In **2025**, the Berkshires recorded 1,231 residential sales (+8.4% YoY) and \$614,699,710 in total sold volume (+12.3% YoY). Active inventory rose to 1,946 (+9.3% YoY), while the average sale price increased to \$499,350 (+3.7% YoY).

Percent of list price softened to 97% (down 1 point), indicating more negotiation and **reinforcing the importance of disciplined pricing—particularly at initial launch.**

Perspective 2025 was not a down market. It was a more strategic market. Buyers had more options, and sellers who priced correctly and marketed astutely continued to achieve strong results—especially during the spring and summer demand cycle.

What Changed—and Why It Matters

- **Inventory rose across all three counties**, expanding buyer selection and increasing price sensitivity in certain segments.
- **Sales and total dollar volume increased year over year**, confirming demand remained active.

- **Sale-to-list softened modestly**, reflecting more negotiation and more frequent price corrections when homes launched above market.
- **County performance diverged:**
 - **Mid County** drove overall activity and absorption
 - **North County** led price growth
 - **South County** carried the most supply and the most negotiation

2025 at a Glance

Key Residential Metrics by County (Year-over-Year Change)

Registry	Active (YoY)	New (YoY)	Sold (YoY)	Sold Volume (YoY)	Avg Sale (YoY)	% of List (chg)
North County (North Registry)	463 (+3.1%)	396 (+2.6%)	330 (+10.7%)	\$124,852,968 (+25.6%)	\$378,342 (+13.4%)	97% (-1 pt)
Mid County (Middle Registry)	1,028 (+12.7%)	917 (+13.6%)	687 (+8.2%)	\$306,107,398 (+10.6%)	\$445,571 (+2.2%)	98% (-1 pt)
South County (South Registry)	455 (+8.6%)	341 (+0.6%)	214 (+5.4%)	\$183,739,344 (+7.5%)	\$858,595 (+2.0%)	95% (-1 pt)
Berkshires Total	1,946 (+9.3%)	1,654 (+8.0%)	1,231 (+8.4%)	\$614,699,710 (+12.3%)	\$499,350 (+3.7%)	97% (-1 pt)

Note: Average sale price is influenced by mix. For neighborhood-level pricing and strategy, we can provide MLS cuts by town, price band, and/or property type.

Source: Berkshire Flex MLS.

Pricing Snapshot (Berkshires-Wide)

Berkshires-wide monthly pricing signals (Active, Pending, Sold)

Across 2025, pricing remained resilient. The clearest strength appeared in summer through early fall, supported by steady absorption. We track pending pricing closely as a forward-looking indicator; when pending values rise into late summer/early fall, it typically signals that demand continues to absorb inventory at strong levels. Seasonal cooling in late fall and winter remained consistent with historic patterns.



Source: Flexmls Market Trends (Residential; North + Middle + South Registry combined; Jan-Dec 2025).

North County

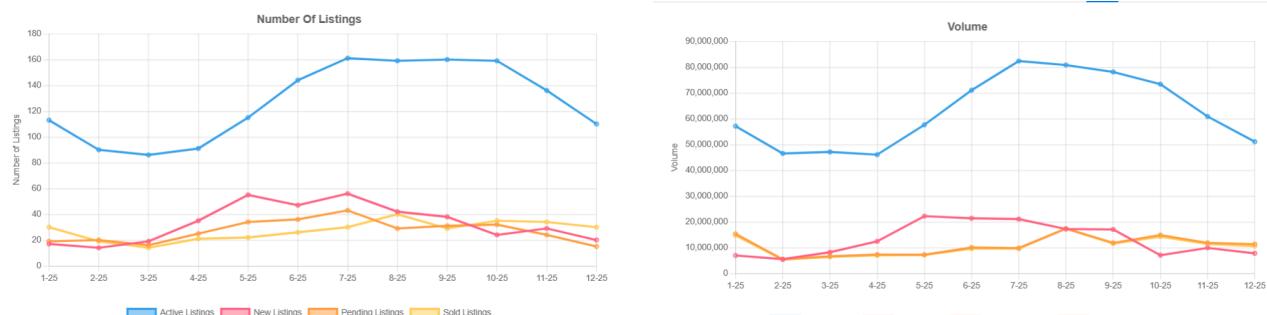
North County remained relatively tight, and 2025 delivered meaningful appreciation for sellers who launched with accurate pricing and strong presentation.

2025 Performance

- **Sales:** 330 (**+10.7% YoY**)
- **Active inventory:** 463 (**+3.1% YoY**)
- **Sold volume:** \$124,852,968 (**+25.6% YoY**)
- **Average sale price:** \$378,342 (**+13.4% YoY**)
- Inventory built through summer/fall and tightened into winter—seasonal, but with healthier selection than recent years.

2026 Implications

- **Sellers:** Peak outcomes clustered in **late spring through summer**. Launch timing and a complete marketing package mattered.
- **Buyers:** Negotiating leverage tended to increase in **late fall/winter** as urgency cooled.
- **Pricing insight:** Watch the spread between **Sale-to-List** and **Sale-to-Original-List**—a widening gap often indicates reductions are doing the work.

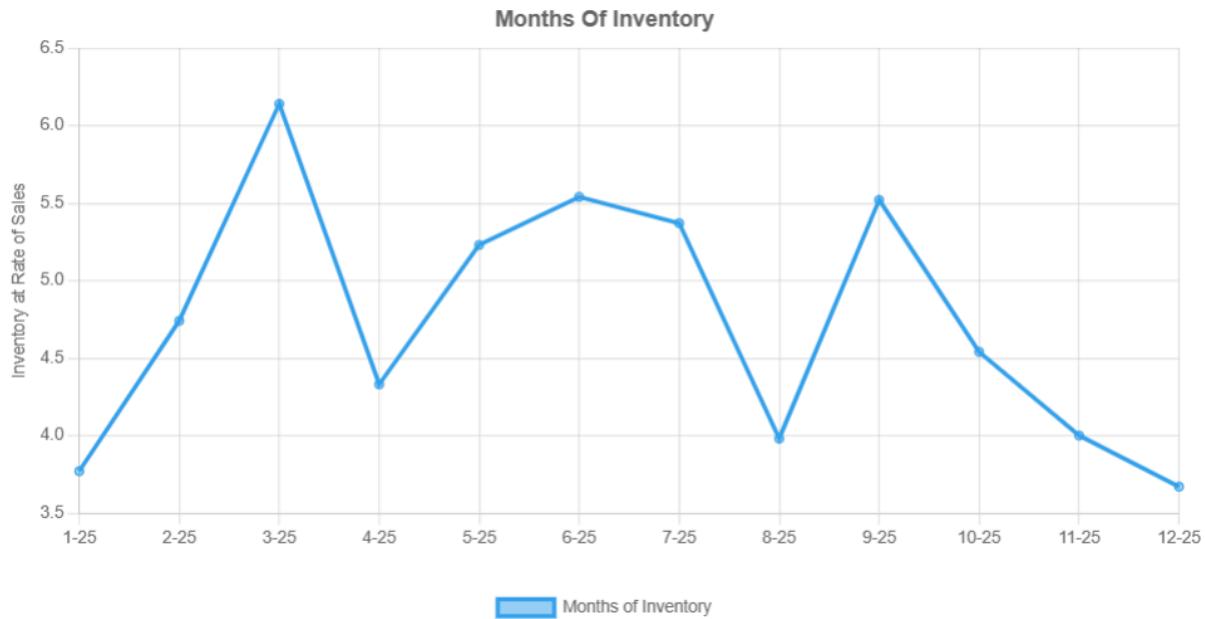


Market activity and inventory (monthly).

Source: Berkshire Flex MLS.

North County - Market Mechanics

Competition, timing, and supply pressure



North County: sale ratios stay strong most of the year; DOM improves into early summer; months of inventory remains tight-to-balanced.

Source: Berkshire Flex MLS.

Mid County

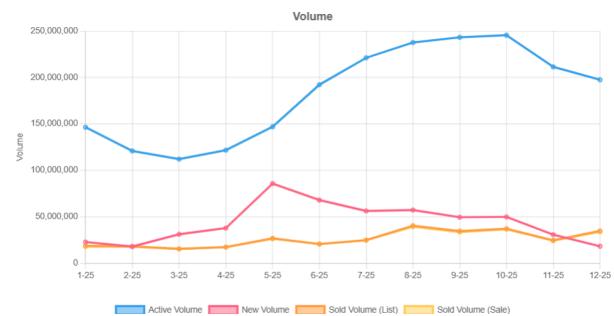
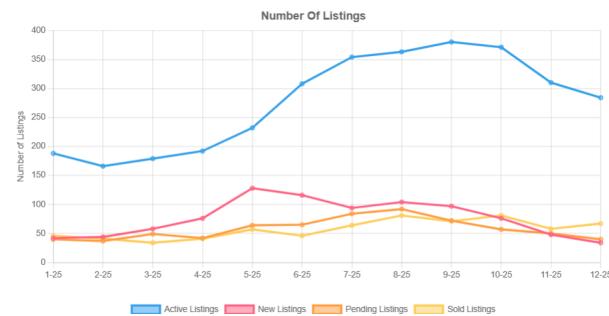
Mid County continued to serve as the Berkshires' volume engine. In 2025, it combined rising inventory with strong absorption, and it showed the most competitive early-summer window.

What happened in 2025

- **Active inventory:** 1,028 (**+12.7% YoY**)
- **New listings:** 917 (**+13.6% YoY**)
- **Sales:** 687 (**+8.2% YoY**)
- **Sold volume:** \$306,107,398 (**+10.6% YoY**)
- New listings peaked in late spring; closings concentrated in late summer/early fall.

2026 Implications

- **Sellers:** The **early-summer window** showed the strongest competition —well-positioned homes traded aggressively.
- **Buyers:** Selection improved, but quality homes still moved quickly. Advantage often came from **terms and certainty**, not just price.
- **Timing insight:** When sale-to-list pushes above 100% seasonally, listing **ahead of the wave (late spring)** can capture peak buyer intensity.



Market activity and inventory (monthly).

Source: Berkshire Flex MLS.

Mid County - Market Mechanics

Competition, timing, and supply pressure



Mid County: early-summer sale-to-list peaks; DOM compresses in late spring; MOI remains in low-to-mid single digits with a mid-year bump.

Source: Berkshire Flex MLS.

South County (South Registry)

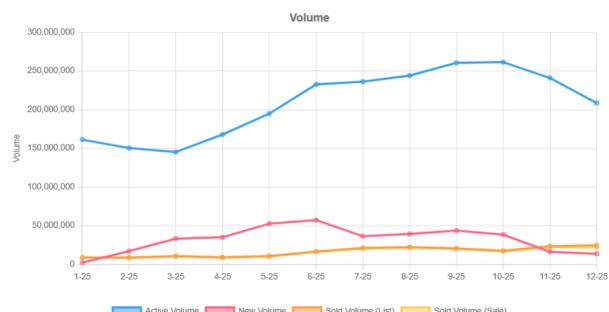
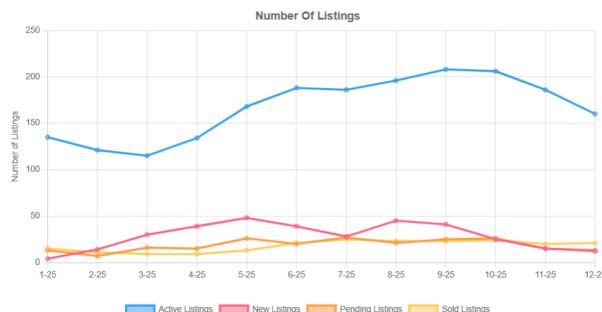
South County operated as a distinct market in 2025: higher price points, higher supply, longer marketing timelines, and wider negotiation ranges.

2025 Performance

- **Active inventory:** 455 (**+8.6% YoY**)
- **Sales:** 214 (**+5.4% YoY**)
- **Sold volume:** \$183,739,344 (**+7.5% YoY**)
- **Average sale price:** \$858,595 (**+2.0% YoY**)
- Monthly results fluctuate more due to smaller market size and higher price bands.

2026 Implications

- **Sellers:** Strategy matters most here—pricing accuracy, preparation, staging, and premium media reduce time on market and protect value.
- **Buyers:** This county offered the most leverage, with higher months of inventory supporting negotiation on **price, repairs, and timing**.
- **Pricing insight:** Monitor **Sale-to-Original-List**—when it declines, it often signals the initial positioning missed the market and required a reset.

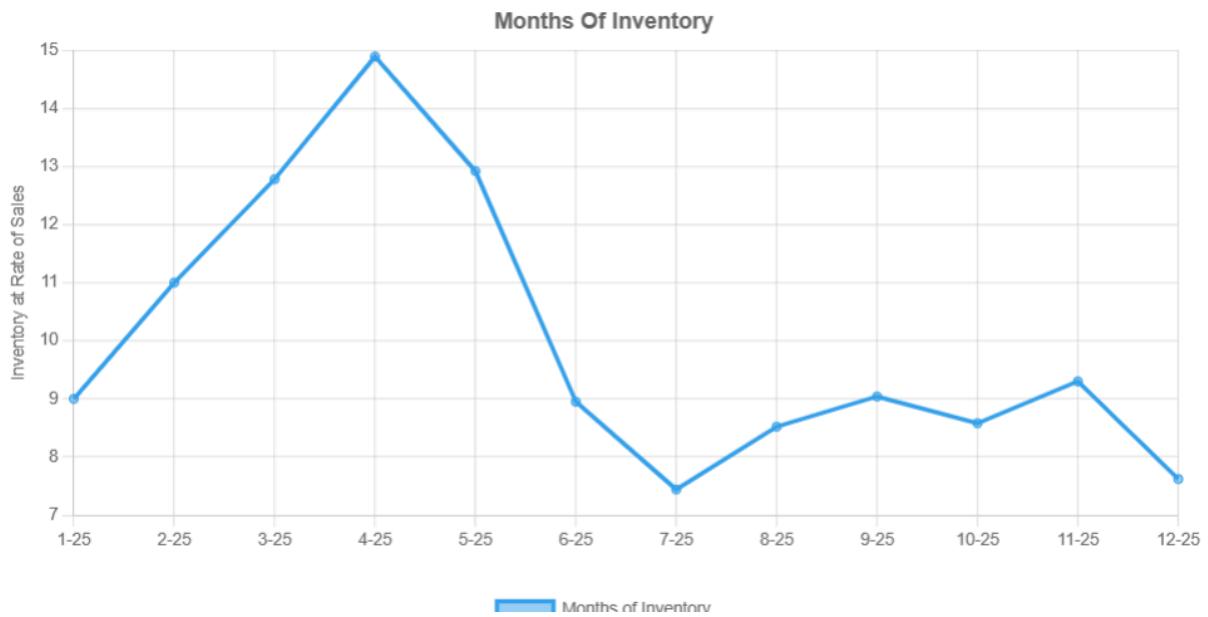
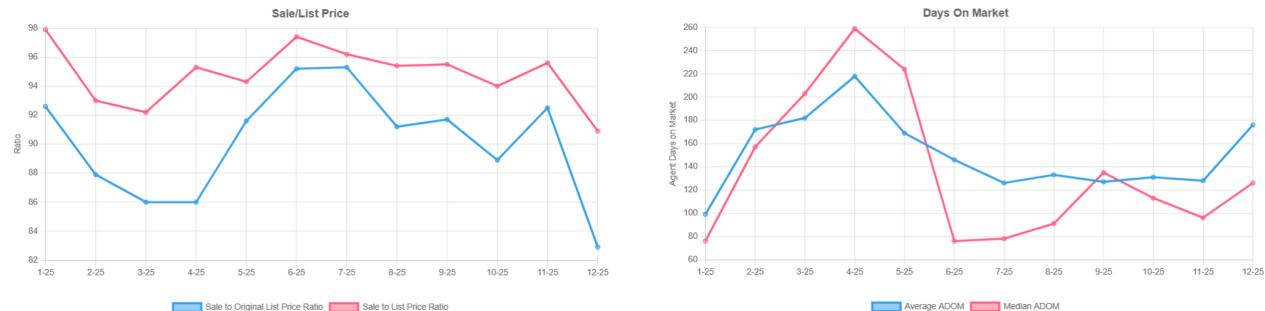


Market activity and inventory (monthly).

Source: Berkshire Flex MLS.

South County - Market Mechanics

Competition, timing, and supply pressure



South County: MOI is materially higher and DOM is more volatile, reflecting greater supply and a more negotiated market.

Source: Berkshire Flex MLS.

2026 BIRCH Properties Playbook

How to Apply 2025 Signals

- **Timing:** The Berkshires remains a spring/summer market. List **ahead of peak demand (late spring)** to align with the strongest sale-to-list behavior.
- **Pricing:** Buyers are less forgiving. The **first pricing decision** remains the most important—especially in higher-inventory segments.
- **Presentation:** Condition and clarity drive offers. Inspection-prep, staging, and professional media reduce days on market and defend price.
- **Negotiation:** In 2026, negotiate strategically. Price is one lever; terms, contingencies, and timing can create value without overpaying.
- **County lens:**
 - **North:** tighter, more seller-leaning
 - **Mid:** bellwether for absorption and pace
 - **South:** choice-driven, more buyer leverage

The Bottom Line In 2026, homes that win will be the homes that are positioned correctly from day one. The market is not rewarding “testing the market”—it is rewarding precision.