

# Elliman Report

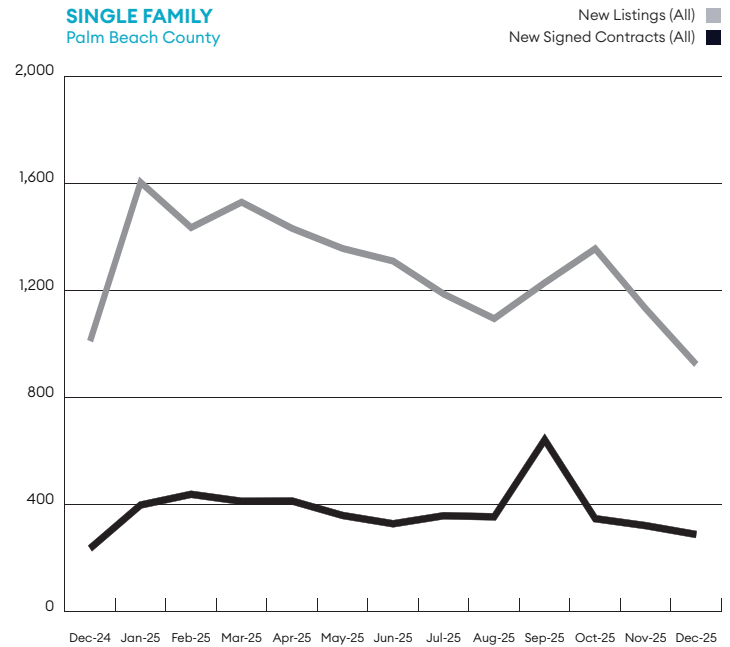
Florida

December 2025 New Signed Contracts

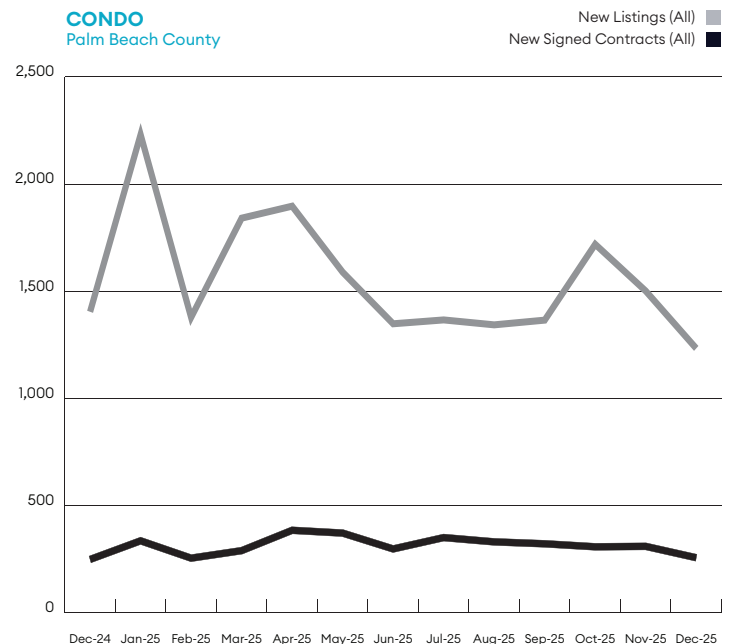
## Palm Beach County

"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<br>Palm Beach County | DEC<br>2025 | DEC<br>2024  | %Δ (YR)      |
|---|-------------|--------------|--------------|
| <b>New Signed Contracts (All)</b>         | <b>288</b>  | <b>236</b>   | <b>22.0%</b> |
| < \$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%        |
| <b>New Listings (All)</b>                 | <b>923</b>  | <b>1,010</b> | <b>-8.6%</b> |
| < \$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<br>Palm Beach County | DEC<br>2025  | DEC<br>2024  | %Δ (YR)       |
|-----------------------------------|--------------|--------------|---------------|
| <b>New Signed Contracts (All)</b> | <b>256</b>   | <b>248</b>   | <b>3.2%</b>   |
| < \$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%         |
| <b>New Listings (All)</b>         | <b>1,233</b> | <b>1,404</b> | <b>-12.2%</b> |
| < \$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%         |

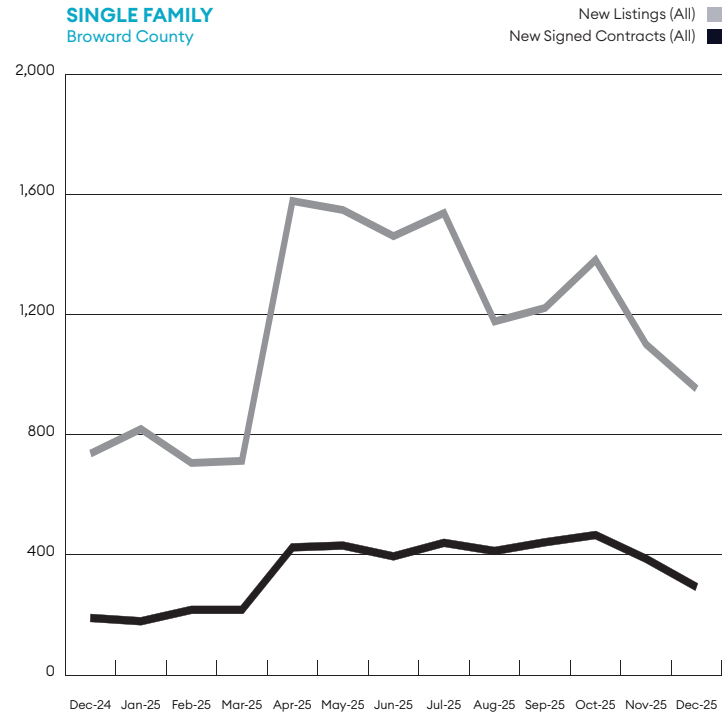


Source: BeachesMLS

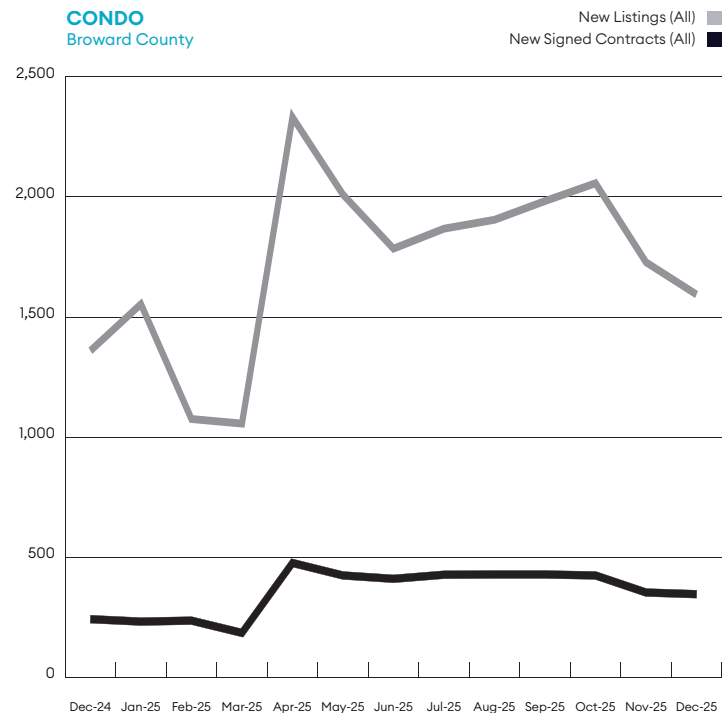
## Broward County

"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<br>Broward County | DEC<br>2025 | DEC<br>2024 | %Δ (YR)      |
|--|-------------|-------------|--------------|
| <b>New Signed Contracts (All)</b>      | <b>293</b>  | <b>190</b>  | <b>54.2%</b> |
| < \$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%      |
| <b>New Listings (All)</b>              | <b>953</b>  | <b>737</b>  | <b>29.3%</b> |
| < \$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<br>Broward County    | DEC<br>2025  | DEC<br>2024  | %Δ (YR)      |
|-----------------------------------|--------------|--------------|--------------|
| <b>New Signed Contracts (All)</b> | <b>347</b>   | <b>243</b>   | <b>42.8%</b> |
| < \$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            |              |
| <b>New Listings (All)</b>         | <b>1,594</b> | <b>1,360</b> | <b>17.2%</b> |
| < \$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%       |

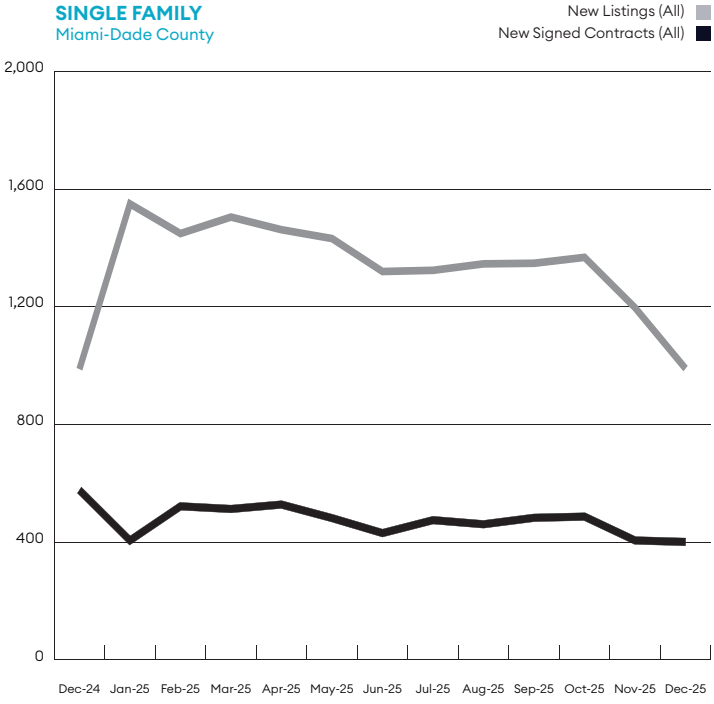


Source: BeachesMLS

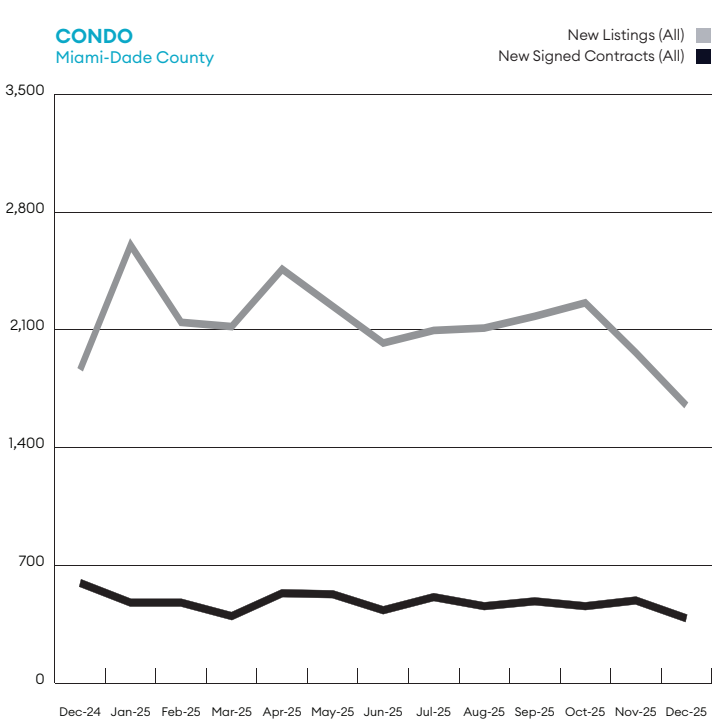
# Miami-Dade County

"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<br>Miami-Dade County | DEC<br>2025 | DEC<br>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<br>Miami-Dade County | DEC<br>2025 | DEC<br>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  
Jonathan Miller at [jmiller@millersamuel.com](mailto:jmiller@millersamuel.com)  
Methodology: [millersamuel.com/research-reports/methodology](https://millersamuel.com/research-reports/methodology)

**Douglas Elliman Real Estate**  
575 Madison Avenue, New York, NY 10022  
212.891.7000 • [elliman.com](https://elliman.com)

**Miller Samuel Real Estate Appraisers & Consultants**  
21 West 38<sup>th</sup> Street, New York, NY 10018  
212.768.8100 • [millersamuel.com](https://millersamuel.com)