

# Monthly Indicators



## December 2025

U.S. existing home sales ticked up 0.5% from the previous month to a seasonally adjusted annual rate of 4.13 million, marking the third consecutive monthly increase, according to the National Association of REALTORS® (NAR). However, sales were down 1.0% from the same period last year. Regionally, sales rose month-over-month in the Northeast and South, were unchanged in the West, and declined in the Midwest. On a year-over-year basis, sales were flat in the Northeast and South and fell in both the Midwest and West.

Closed Sales increased 3.7 percent for Existing Homes homes but decreased 1.7 percent for New Construction homes. Pending Sales decreased 6.1 percent for Existing Homes homes but increased 14.7 percent for New Construction homes. Inventory increased 3.2 percent for Existing Homes homes and 1.5 percent for New Construction homes.

Median Sales Price increased 3.1 percent to \$299,000 for Existing Homes homes and 4.0 percent to \$519,804 for New Construction homes. Days on Market increased 10.3 percent for Existing Homes homes and 0.9 percent for New Construction homes. Months Supply of Inventory remained flat for Existing Homes homes but decreased 1.9 percent for New Construction properties.

The national median existing-home price continued to climb, rising 1.2% from a year ago to \$409,200, according to NAR. This year-over-year increase—the 29th consecutive monthly gain—reflects ongoing tightness in housing supply. At the end of November, there were 1.43 million units for sale, down 5.9% from the previous month but up 7.5% from the same time last year, representing a 4.2-month supply at the current sales pace.

## Quick Facts

<b>+ 3.2%</b>	<b>+ 2.2%</b>	<b>0.0%</b>
Change in <b>Closed Sales</b> Combined	Change in <b>Avg. Sales Price</b> Combined	Change in <b>Supply</b> Combined

Residential real estate activity in the Kansas counties of Atchison, Douglas, Franklin, Jefferson, Johnson, Leavenworth, Linn, Miami and Wyandotte and the Missouri counties of Bates, Buchanan, Cass, Clay, Clinton, Jackson, Johnson, Lafayette, Platte and Ray. Percent changes are calculated using rounded figures.

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# Existing Homes Market Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Existing Homes properties only.



Key Metrics	Historical Sparkbars					12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
	12-2023	6-2024	12-2024	6-2025	12-2025						
<b>Closed Sales</b>						2,605	<b>2,702</b>	+ 3.7%	33,245	<b>34,174</b>	+ 2.8%
<b>Average Sales Price</b>						\$341,362	<b>\$346,095</b>	+ 1.4%	\$335,502	<b>\$361,613</b>	+ 7.8%
<b>Median Sales Price</b>						\$290,000	<b>\$299,000</b>	+ 3.1%	\$289,900	<b>\$305,000</b>	+ 5.2%
<b>Days on Market Until Sale</b>						39	<b>43</b>	+ 10.3%	31	<b>35</b>	+ 12.9%
<b>Pct. of Orig. Price Received</b>						95.7%	<b>95.2%</b>	- 0.5%	97.6%	<b>97.1%</b>	- 0.5%
<b>Pending Sales</b>						1,809	<b>1,699</b>	- 6.1%	33,258	<b>34,242</b>	+ 3.0%
<b>Inventory</b>						5,294	<b>5,463</b>	+ 3.2%	—	—	—
<b>Supply</b>						1.9	<b>1.9</b>	0.0%	—	—	—

# New Homes Market Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. New Construction properties only.



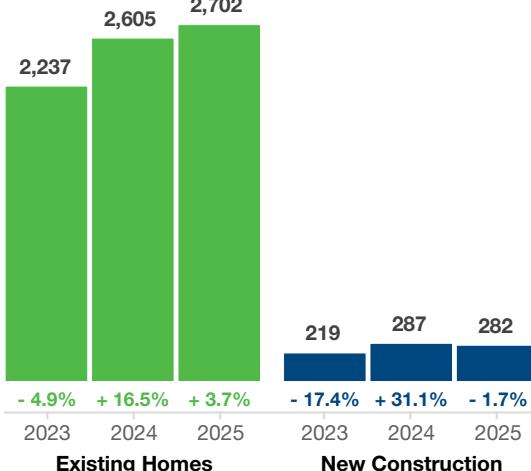
Key Metrics	Historical Sparkbars					12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
	12-2023	6-2024	12-2024	6-2025	12-2025						
<b>Closed Sales</b>						287	282	- 1.7%	3,206	3,331	+ 3.9%
<b>Average Sales Price</b>						\$559,678	\$609,710	+ 8.9%	\$588,377	\$591,032	+ 0.5%
<b>Median Sales Price</b>						\$500,000	\$519,804	+ 4.0%	\$529,000	\$510,000	- 3.6%
<b>Days on Market Until Sale</b>						108	109	+ 0.9%	137	114	- 16.8%
<b>Pct. of Orig. Price Received</b>						100.0%	100.4%	+ 0.4%	100.4%	100.4%	0.0%
<b>Pending Sales</b>						197	226	+ 14.7%	3,462	3,235	- 6.6%
<b>Inventory</b>						1,449	1,471	+ 1.5%	—	—	—
<b>Supply</b>						5.4	5.3	- 1.9%	—	—	—

# Closed Sales

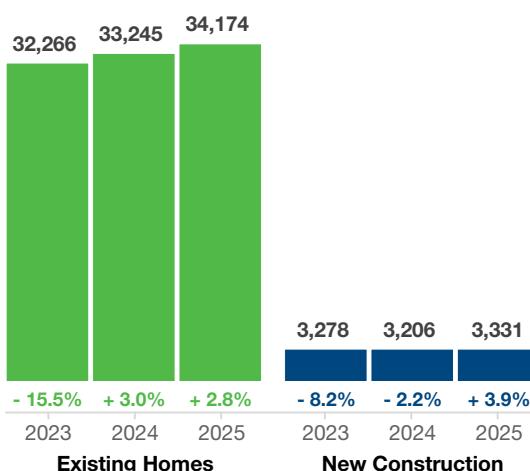
A count of the actual sales that closed in a given month.



## December

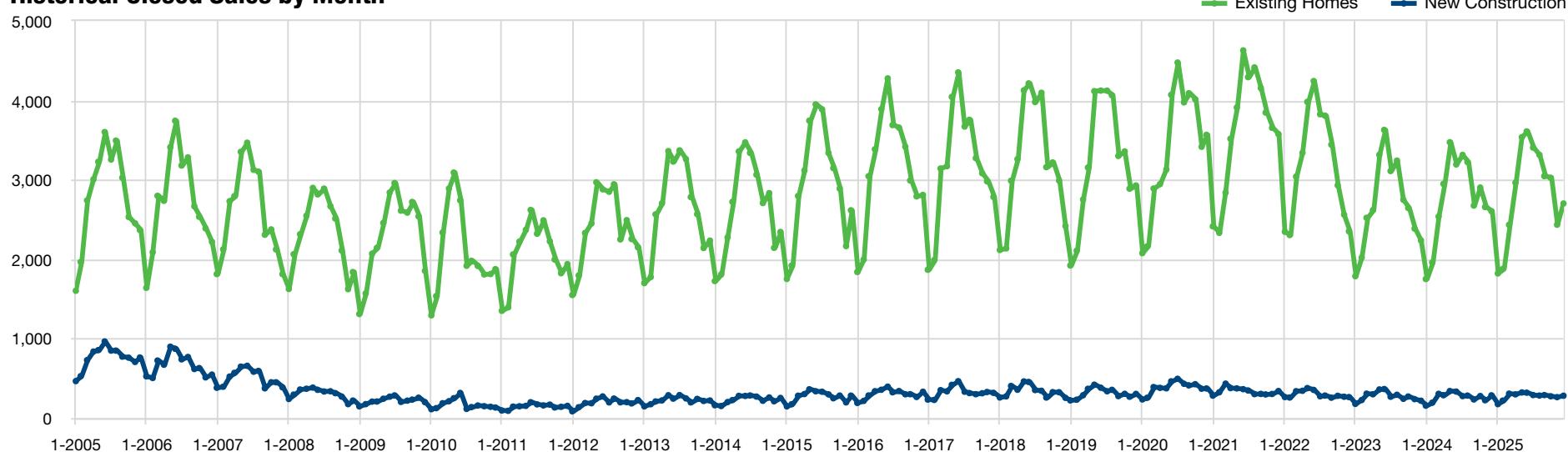


## Year to Date



Closed Sales	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	1,822	+ 4.1%	176	+ 12.1%
Feb-2025	1,877	- 4.2%	220	+ 13.4%
Mar-2025	2,434	- 4.1%	308	+ 0.7%
Apr-2025	2,964	+ 0.5%	299	+ 3.8%
May-2025	3,537	+ 1.8%	323	- 5.3%
Jun-2025	3,610	+ 13.0%	320	- 4.2%
Jul-2025	3,406	+ 2.8%	290	+ 4.7%
Aug-2025	3,314	+ 2.8%	284	0.0%
Sep-2025	3,047	+ 13.9%	290	+ 23.4%
Oct-2025	3,026	+ 4.2%	275	- 1.1%
Nov-2025	2,435	- 8.4%	264	+ 17.3%
<b>Dec-2025</b>	<b>2,702</b>	<b>+ 3.7%</b>	<b>282</b>	<b>- 1.7%</b>
12-Month Avg	2,848	+ 2.8%	278	+ 4.1%

## Historical Closed Sales by Month

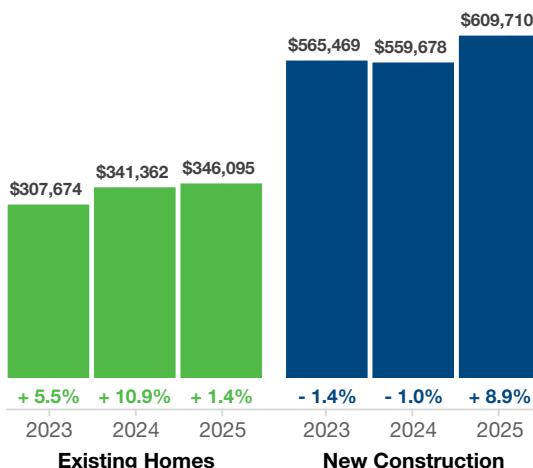


# Average Sales Price

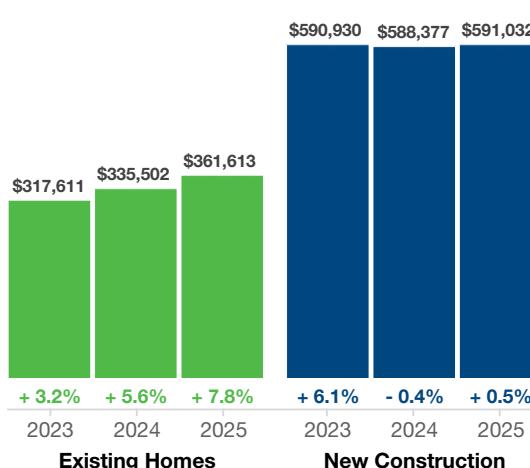
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



## December



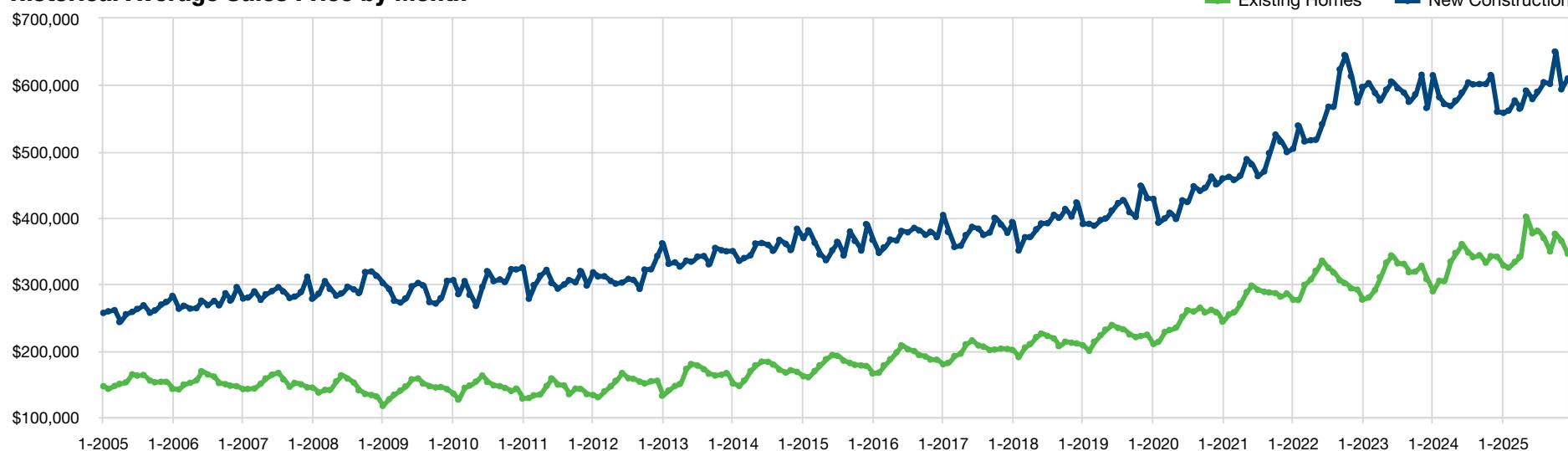
## Year to Date



	Avg. Sales Price	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	\$328,286		+ 13.5%	\$558,005	- 9.2%
Feb-2025	\$325,122		+ 6.6%	\$561,297	- 3.5%
Mar-2025	\$333,461		+ 9.5%	\$576,639	+ 0.9%
Apr-2025	\$341,165		+ 2.1%	\$564,324	- 0.7%
May-2025	\$401,586		+ 15.7%	\$591,538	+ 2.6%
Jun-2025	\$376,747		+ 4.5%	\$578,769	- 1.7%
Jul-2025	\$380,611		+ 9.4%	\$589,746	- 2.3%
Aug-2025	\$369,368		+ 8.4%	\$604,153	+ 0.5%
Sep-2025	\$349,349		+ 1.6%	\$601,573	+ 0.0%
Oct-2025	\$375,736		+ 13.1%	\$650,341	+ 8.1%
Nov-2025	\$365,172		+ 6.7%	\$593,501	- 3.5%
<b>Dec-2025</b>	<b>\$346,095</b>		<b>+ 1.4%</b>	<b>\$609,710</b>	<b>+ 8.9%</b>
12-Month Avg*	\$361,613		+ 7.8%	\$591,032	+ 0.5%

\* Avg. Sales Price for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

## Historical Average Sales Price by Month

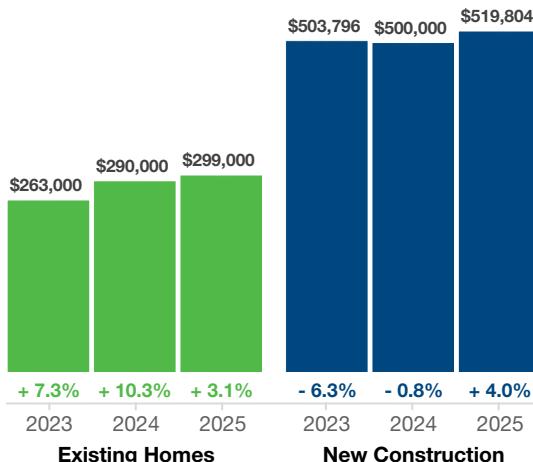


# Median Sales Price

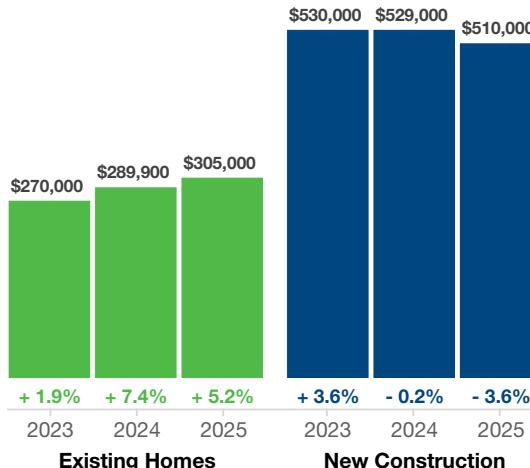
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



## December



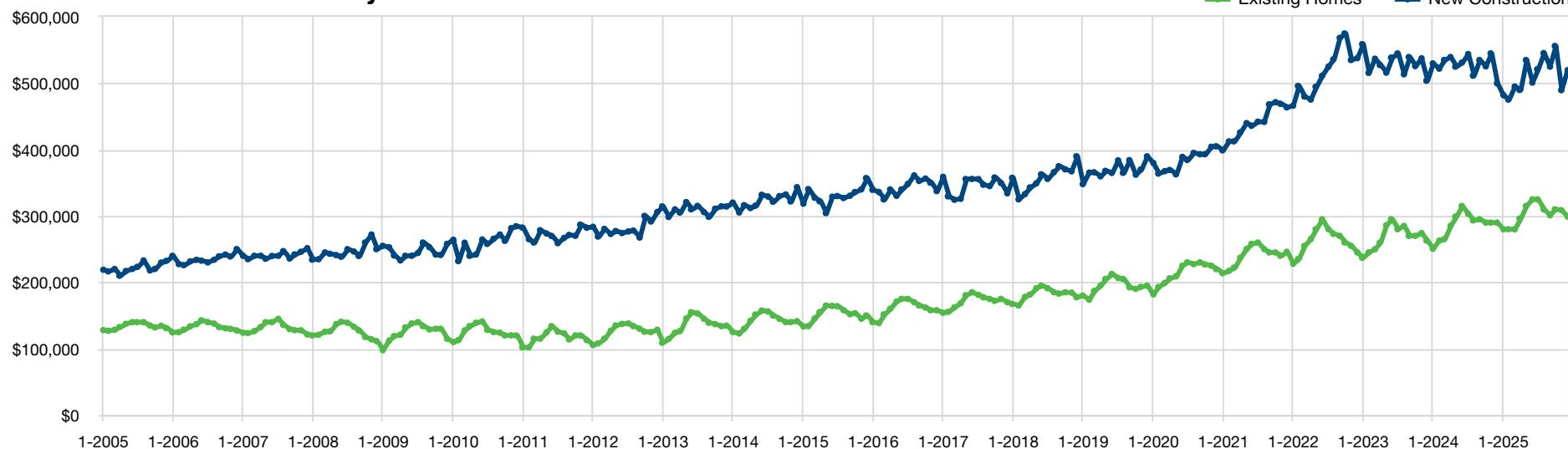
## Year to Date



Median Sales Price	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	\$279,900	+ 11.7%	\$482,068	- 9.0%
Feb-2025	\$280,000	+ 6.6%	\$475,343	- 8.9%
Mar-2025	\$279,950	+ 5.6%	\$495,000	- 7.5%
Apr-2025	\$296,000	+ 3.9%	\$489,900	- 9.2%
May-2025	\$315,000	+ 5.4%	\$535,000	+ 1.9%
Jun-2025	\$325,000	+ 3.2%	\$500,995	- 5.7%
Jul-2025	\$325,000	+ 7.2%	\$521,194	- 4.2%
Aug-2025	\$310,000	+ 5.7%	\$545,444	+ 6.7%
Sep-2025	\$301,000	+ 2.0%	\$525,000	- 1.9%
Oct-2025	\$310,000	+ 6.9%	\$556,150	+ 5.8%
Nov-2025	\$308,750	+ 6.5%	\$489,583	- 10.2%
<b>Dec-2025</b>	<b>\$299,000</b>	<b>+ 3.1%</b>	<b>\$519,804</b>	<b>+ 4.0%</b>
12-Month Avg*	\$305,000	+ 5.2%	\$510,000	- 3.6%

\* Median Sales Price for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

## Historical Median Sales Price by Month

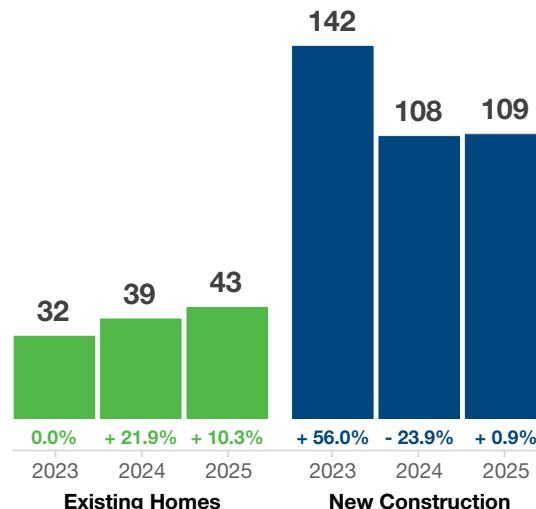


# Days on Market Until Sale

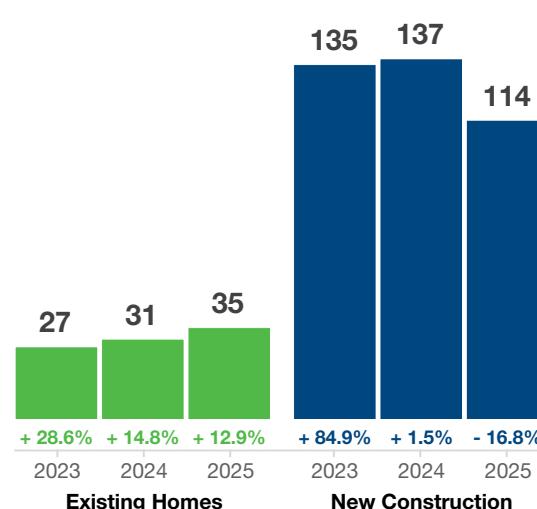
Average number of days between when a property is listed and when an offer is accepted in a given month.



## December



## Year to Date

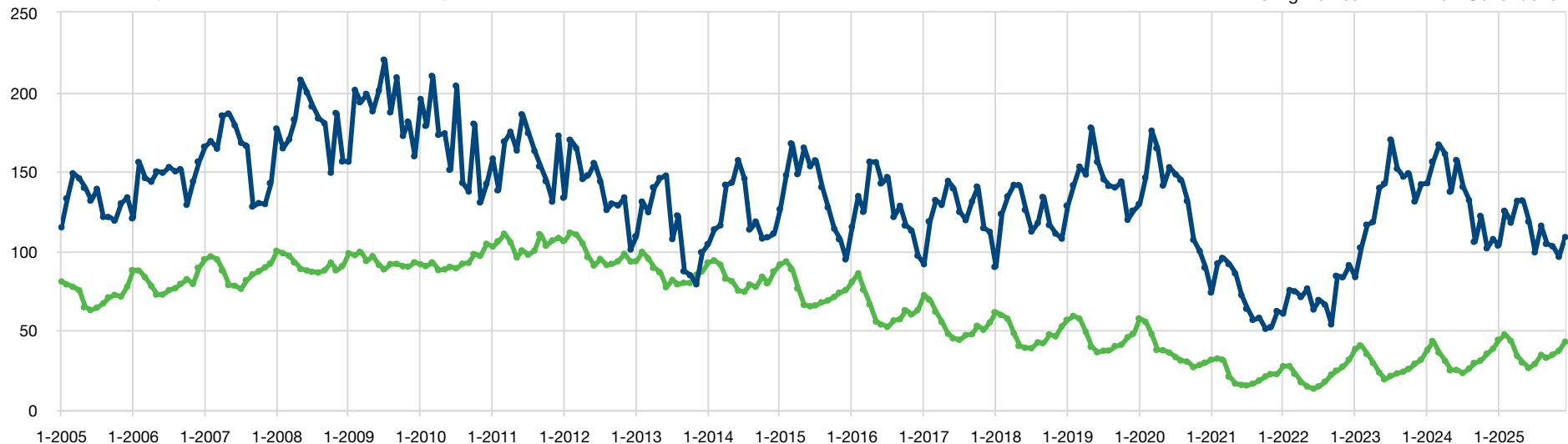


Days on Market	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	44	+ 15.8%	104	- 27.3%
Feb-2025	48	+ 11.6%	125	- 19.9%
Mar-2025	44	+ 22.2%	118	- 29.3%
Apr-2025	34	+ 9.7%	132	- 18.0%
May-2025	30	+ 20.0%	132	- 3.6%
Jun-2025	26	+ 4.0%	119	- 24.2%
Jul-2025	29	+ 26.1%	99	- 29.8%
Aug-2025	35	+ 34.6%	116	- 12.1%
Sep-2025	33	+ 10.0%	105	- 0.9%
Oct-2025	35	+ 12.9%	103	- 15.6%
Nov-2025	37	+ 5.7%	96	- 5.9%
Dec-2025	43	+ 10.3%	109	+ 0.9%
12-Month Avg*	35	+ 14.0%	114	- 16.9%

\* Days on Market for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

— Existing Homes — New Construction

## Historical Days on Market Until Sale by Month

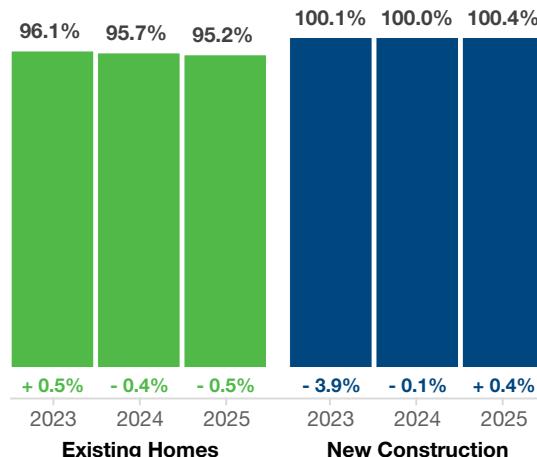


# Percentage of Original List Price Received

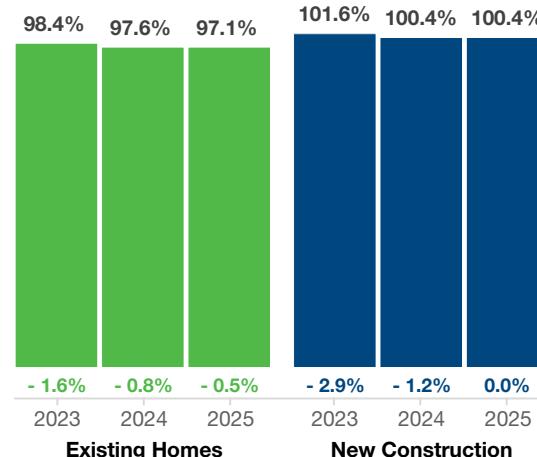
Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



## December



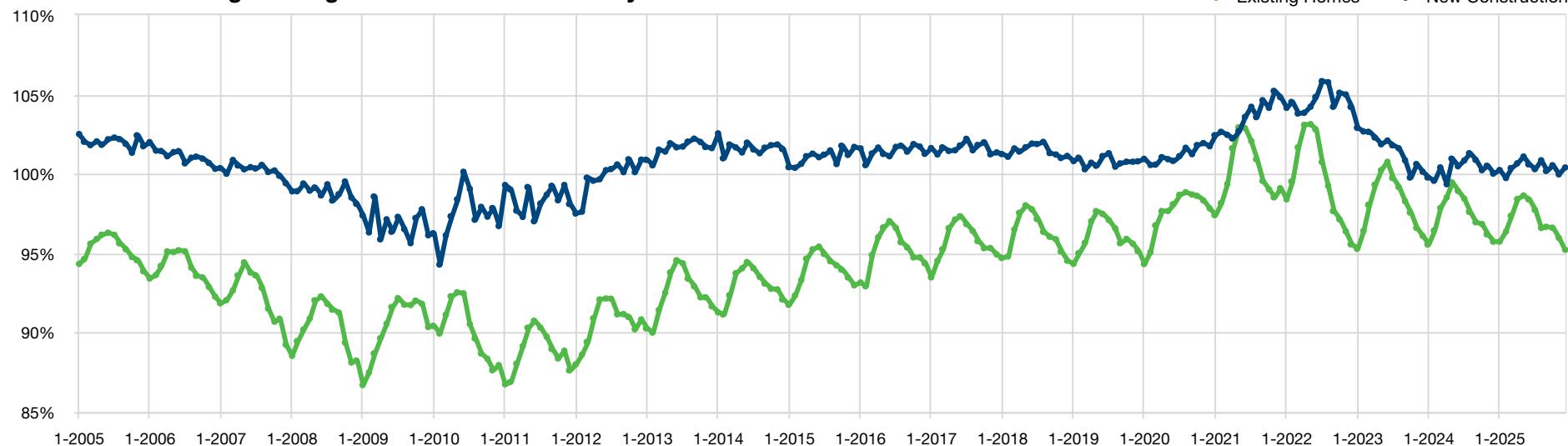
## Year to Date



Pct. of Orig. Price Received	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	95.7%	+ 0.1%	100.2%	+ 0.4%
Feb-2025	96.4%	0.0%	99.7%	+ 0.1%
Mar-2025	97.4%	- 0.5%	100.4%	0.0%
Apr-2025	98.4%	- 0.1%	100.7%	+ 1.3%
May-2025	98.6%	- 0.9%	101.1%	+ 0.1%
Jun-2025	98.4%	- 0.5%	100.6%	+ 0.1%
Jul-2025	97.7%	- 0.7%	100.3%	- 0.6%
Aug-2025	96.6%	- 1.0%	100.9%	- 0.4%
Sep-2025	96.7%	- 0.3%	100.2%	- 0.7%
Oct-2025	96.6%	- 0.2%	100.5%	+ 0.3%
Nov-2025	96.0%	- 0.2%	100.0%	- 0.5%
<b>Dec-2025</b>	<b>95.2%</b>	<b>- 0.5%</b>	<b>100.4%</b>	<b>+ 0.4%</b>
12-Month Avg*	97.1%	- 0.4%	100.4%	+ 0.0%

\* Pct. of Orig. Price Received for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

## Historical Percentage of Original List Price Received by Month

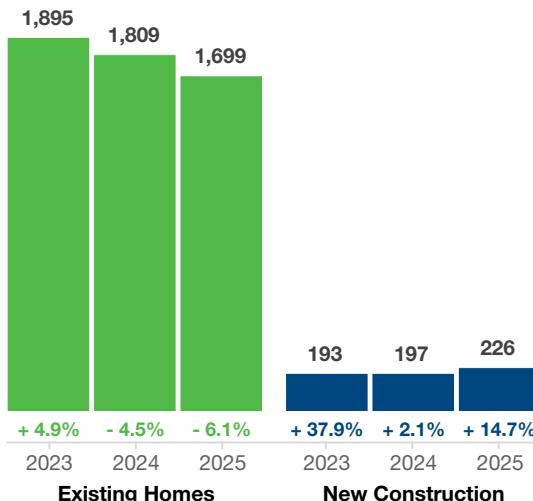


# Pending Sales

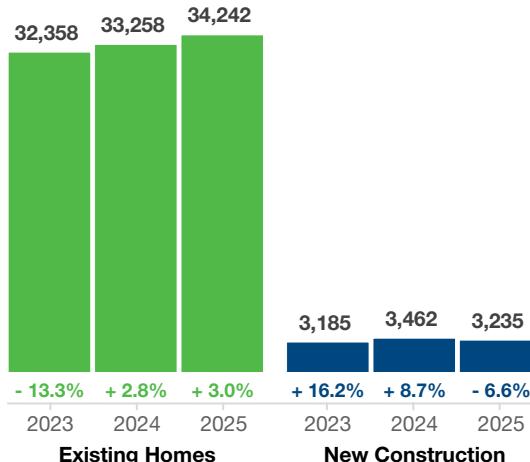
A count of the properties on which offers have been accepted in a given month.



## December

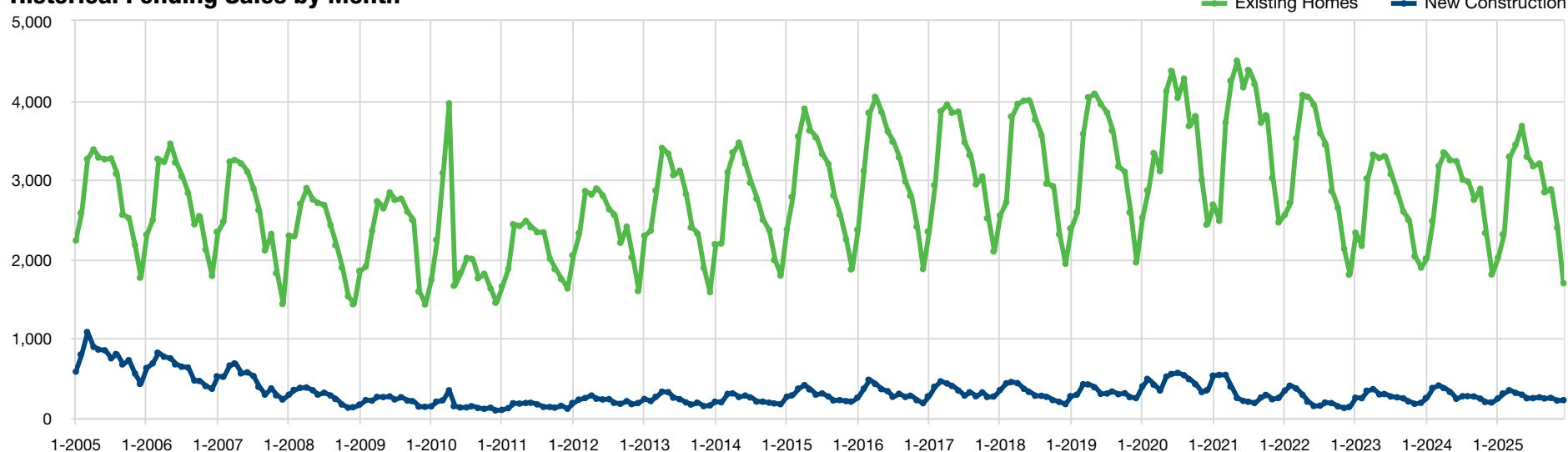


## Year to Date



Pending Sales	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	2,020	+ 0.5%	248	- 2.0%
Feb-2025	2,314	- 6.8%	310	- 18.2%
Mar-2025	3,291	+ 3.7%	351	- 14.6%
Apr-2025	3,445	+ 3.0%	318	- 15.9%
May-2025	3,678	+ 13.2%	295	- 10.3%
Jun-2025	3,292	+ 1.8%	250	+ 2.9%
Jul-2025	3,172	+ 5.6%	252	- 8.7%
Aug-2025	3,206	+ 7.6%	262	- 5.1%
Sep-2025	2,844	+ 3.5%	247	- 9.2%
Oct-2025	2,882	- 0.2%	255	+ 4.1%
Nov-2025	2,399	+ 2.9%	221	+ 8.9%
<b>Dec-2025</b>	<b>1,699</b>	<b>- 6.1%</b>	<b>226</b>	<b>+ 14.7%</b>
12-Month Avg	2,854	+ 3.0%	270	- 6.6%

## Historical Pending Sales by Month

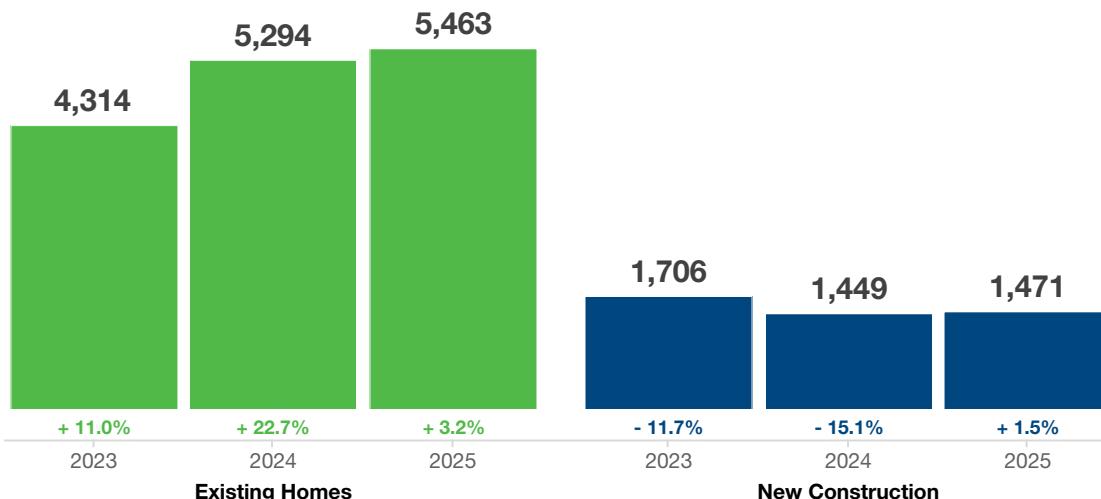


# Inventory

The number of properties available for sale in active status at the end of a given month.

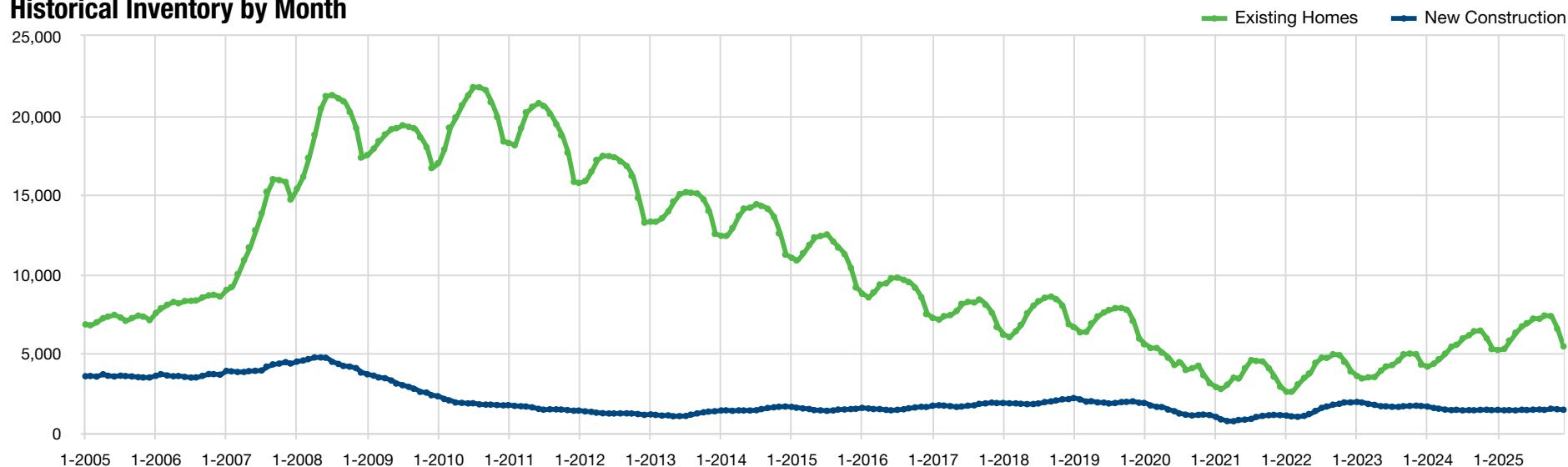


## December



Inventory	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	5,233	+ 25.0%	1,463	- 12.6%
Feb-2025	5,304	+ 21.3%	1,440	- 9.0%
Mar-2025	5,821	+ 25.2%	1,448	- 5.9%
Apr-2025	6,323	+ 26.5%	1,433	- 3.2%
May-2025	6,721	+ 23.5%	1,472	+ 1.7%
Jun-2025	6,922	+ 24.5%	1,455	- 0.9%
Jul-2025	7,210	+ 20.9%	1,477	+ 3.1%
Aug-2025	7,199	+ 16.8%	1,487	+ 2.8%
Sep-2025	7,404	+ 15.4%	1,466	+ 1.7%
Oct-2025	7,368	+ 14.2%	1,535	+ 4.9%
Nov-2025	6,579	+ 10.2%	1,503	+ 2.2%
<b>Dec-2025</b>	<b>5,463</b>	<b>+ 3.2%</b>	<b>1,471</b>	<b>+ 1.5%</b>
12-Month Avg	6,462	+ 18.4%	1,471	- 1.3%

## Historical Inventory by Month

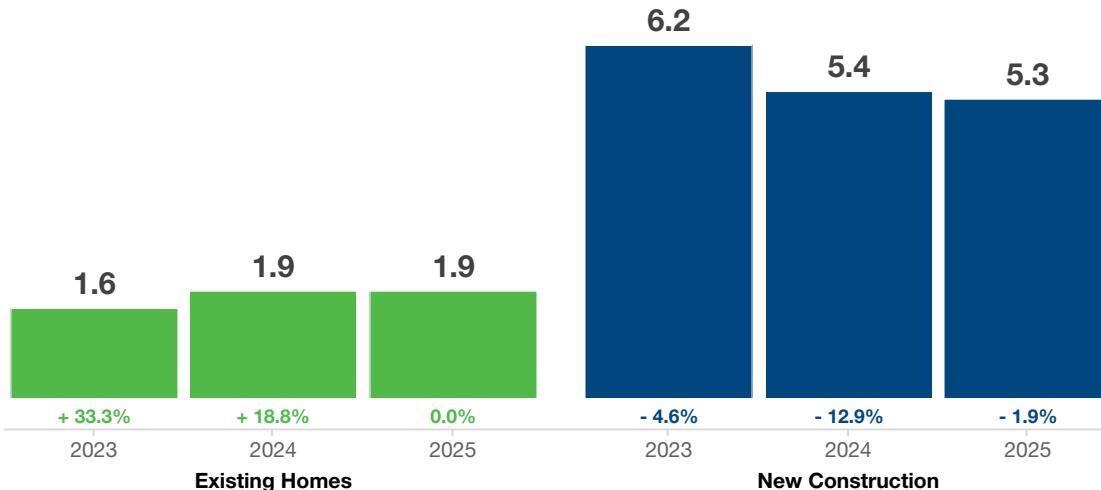


# Supply

The inventory of homes for sale at the end of a given month, divided by the average monthly closed sales from the last 12 months.



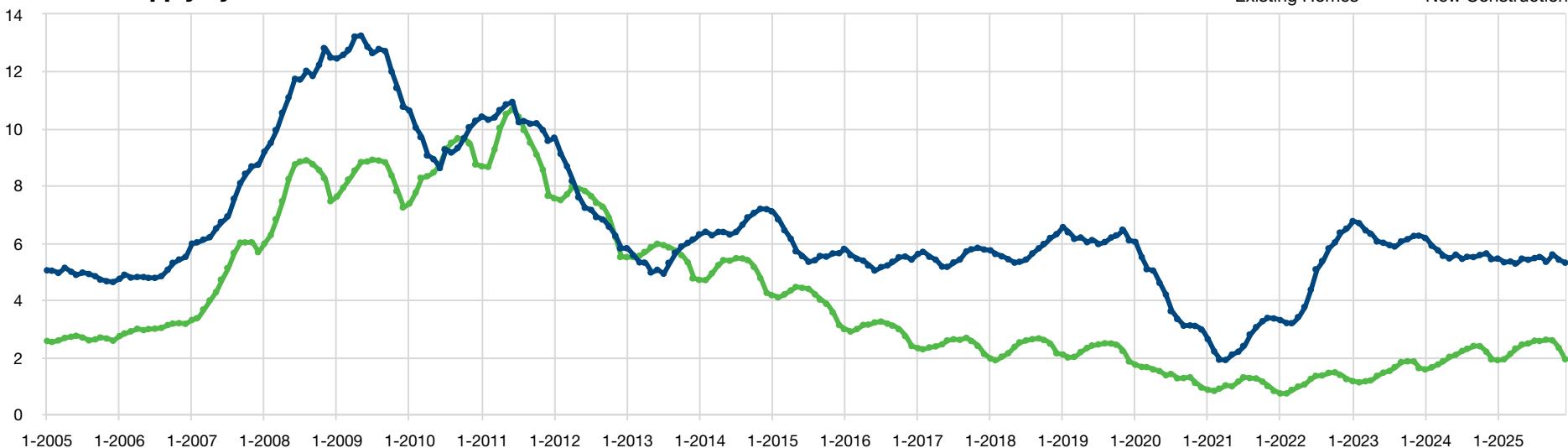
## December



Supply	Existing Homes	Year-Over-Year Change	New Construction	Year-Over-Year Change
Jan-2025	1.9	+ 18.8%	5.4	- 12.9%
Feb-2025	1.9	+ 18.8%	5.3	- 10.2%
Mar-2025	2.1	+ 23.5%	5.3	- 7.0%
Apr-2025	2.3	+ 27.8%	5.3	- 3.6%
May-2025	2.4	+ 20.0%	5.4	- 1.8%
Jun-2025	2.5	+ 19.0%	5.4	- 3.6%
Jul-2025	2.6	+ 18.2%	5.5	+ 1.9%
Aug-2025	2.6	+ 13.0%	5.5	0.0%
Sep-2025	2.6	+ 8.3%	5.3	- 3.6%
Oct-2025	2.6	+ 8.3%	5.6	0.0%
Nov-2025	2.3	+ 4.5%	5.4	- 3.6%
<b>Dec-2025</b>	<b>1.9</b>	<b>0.0%</b>	<b>5.3</b>	<b>- 1.9%</b>
12-Month Avg*	2.3	+ 14.3%	5.4	- 3.9%

\* Supply for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

## Historical Supply by Month



# New and Existing Homes Combined Activity Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year.



Key Metrics	Historical Sparkbars	12-2024		12-2025		% Change	YTD 2024	YTD 2025	% Change
		12-2023	6-2024	12-2024	6-2025				
<b>Closed Sales</b>		2,892		2,984		+ 3.2%	36,451	37,505	+ 2.9%
<b>Average Sales Price</b>		\$363,072		\$370,961		+ 2.2%	\$357,773	\$381,970	+ 6.8%
<b>Median Sales Price</b>		\$310,000		\$315,000		+ 1.6%	\$305,000	\$320,711	+ 5.2%
<b>Days on Market Until Sale</b>		46		49		+ 6.5%	40	42	+ 5.0%
<b>Pct. of Orig. Price Received</b>		96.2%		95.7%		- 0.5%	97.8%	97.4%	- 0.4%
<b>Pending Sales</b>		2,006		1,925		- 4.0%	36,720	37,477	+ 2.1%
<b>Inventory</b>		6,743		6,934		+ 2.8%	—	—	—
<b>Supply</b>		2.2		2.2		0.0%	—	—	—