

STATE OF THE MARKET



January 2026

	Year over Year Changes			Month to Month Changes		
	January 2026	January 2025	Percent chg	January 2026	December 2025	Percent chg
Inventory	11,741	11,697	0.4%	11,741	11,389	3.1%
New Listings	3,852	4,220	-8.7%	3,852	2,415	59.5%
New Contracts	2,064	2,125	-2.9%	2,064	1,561	32.2%
Total Pendings	3,515	3,320	5.9%	3,515	2,825	24.4%
Closed Sales	1,634	1,514	7.9%	1,634	2,182	-25.1%
Average Price	\$461,813	\$492,645	-6.3%	\$461,813	\$482,267	-4.2%
Median Price	\$370,000	\$375,000	-1.3%	\$370,000	\$380,313	-2.7%
Monthly Volume	\$754,602,625	\$745,865,179	1.2%	\$754,602,625	\$1,052,307,213	-28.3%
Avg Days on Mkt	81	74	9.5%	81	78	3.8%
Avg Days to Sale	118	111	6.3%	118	113	4.4%
Months of Supply	7.19	7.73	-7.0%	7.19	5.22	37.7%

State of the Market

- “Many buyers tend to hit ‘refresh’ in January, viewing a new year as an opportunity to make a fresh start in their home search. This seasonal shift often leads to a surge in new listings and pending sales, as we witnessed in the Orlando market,” said Chris Atwell, 2026 president of the Orlando Regional REALTOR® Association. “With homes sitting on the market for the longest time since 2016, it’s important for sellers to work closely with their Realtor to identify the ideal asking price and guide them to negotiate favorable terms. While overall sales have slowed, we are optimistic about the spring market. We’re likely to see pending sales transition into increased activity in February, setting the stage for an active spring and summer.”
- The median home price for January was recorded at \$370,000, down 2.7% from December’s median home price of \$380,313.
- Overall sales fell by 25.1% from December to January. There were 2,182 sales in December and 1,634 sales in January.
- Inventory for January was recorded at 11,741, up 3.1% from December when inventory was recorded at 11,389.
- January’s interest rate was recorded at 6.0% – holding steady from 6.0% in December.
- New listings rose 59.5% from December to January, with 3,852 new homes on the market in January, compared to 2,415 in December.
- 35 distressed homes (bank-owned properties and short sales) accounted for 2.1% of all home sales in January. This is a 52.2% increase from December, when 23 distressed homes sold.



January 2026

18 Months - At A Glance

A quick look at the Orlando market over the last 18 months

ORRA Originated Sales	Average Mtg Rate	Inventory				New Listings	New Contracts	Total Pending	Back on Market	EXP	WDN	Sales Closed	Days on Mkt
		Total	Single Family Homes	Condos	Townhomes/Villas								
Aug '24	6.09%	11,511	8,005	2,229	1,277	3,856	2,259	3,556	609	400	1,125	2,655	57
Sep '24	5.89%	11,560	8,078	2,217	1,265	3,530	2,020	3,490	536	396	980	2,249	58
Oct '24	6.40%	11,357	7,905	2,209	1,243	3,260	1,784	2,767	779	419	1,044	2,085	60
Nov '24	6.69%	11,604	8,054	2,253	1,297	3,185	1,981	3,285	537	408	1,029	1,805	67
Dec '24	6.53%	10,049	6,898	2,019	1,132	2,510	1,438	2,661	433	663	1,062	2,154	68
Jan '25	6.85%	11,697	8,014	2,348	1,335	4,220	2,125	3,320	521	406	1,265	1,514	74
Feb '25	6.69%	12,411	8,467	2,486	1,458	4,140	2,377	4,006	463	403	1,083	1,837	76
Mar '25	6.55%	0	0	0	0	4,521	2,640	0	525	451	1,155	2,408	75
Apr '25	6.64%	13,304	9,082	2,639	1,583	4,503	2,573	4,151	601	440	1,192	2,459	70
May '25	6.78%	13,957	9,662	2,600	1,695	4,208	2,560	4,238	633	449	1,170	2,551	68
Jun '25	6.68%	13,793	9,614	2,522	1,657	3,854	2,430	3,976	622	505	1,207	2,513	67
Jul '25	6.46%	13,557	9,482	2,445	1,630	3,788	2,316	3,771	575	527	1,285	2,551	69
Aug '25	6.35%	13,306	9,245	2,458	1,603	3,353	2,275	3,687	577	512	1,219	2,306	75
Sep '25	6.05%	13,007	9,029	2,397	1,581	3,371	2,343	3,798	574	578	1,151	2,245	72
Oct '25	6.02%	13,047	9,006	2,424	1,617	3,676	2,144	3,648	544	525	1,162	2,335	77
Nov '25	6.05%	12,516	8,565	2,378	1,573	2,891	1,941	3,489	465	485	1,074	1,820	76
Dec '25	6.04%	11,389	7,770	2,183	1,436	2,415	1,561	2,825	406	934	1,118	2,182	78
Jan '26	6.00%	11,741	8,031	2,215	1,495	3,852	2,064	3,515	454	472	1,224	1,634	81
ORRA Originated Sales	Average Mtg Rate	Total	Single Family Homes	Condos	Townhomes/Villas	New Listings	New Contracts	Total Pending	Back on Market	EXP	WDN	Sales Closed	Days on Mkt
		Inventory											

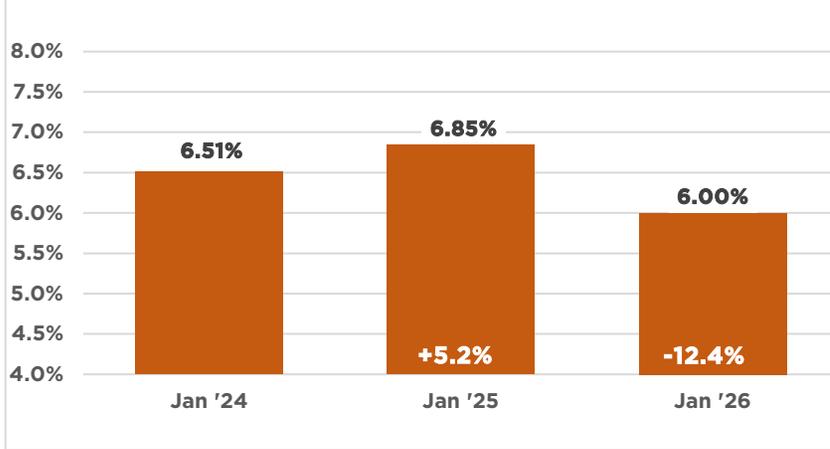
Complete stats and data may be found under Market Info at www.orlandorealtors.org. Comments or suggestions? Contact Mike Blinn, Statistician. State of the Market™ data represents all listings, taken or sold, by ORRA brokers, regardless of location, and is exclusive to residential property, which includes townhomes, duplexes, single-family homes, and condos. It does not include vacant land, or commercial transactions.



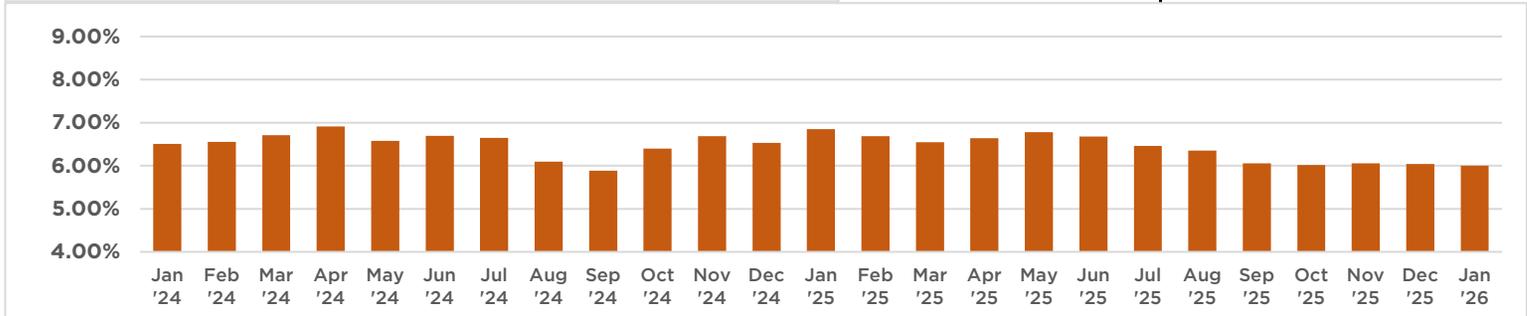
January 2026

Mortgage Rates

Avg mortgage paid by buyers in Central Florida

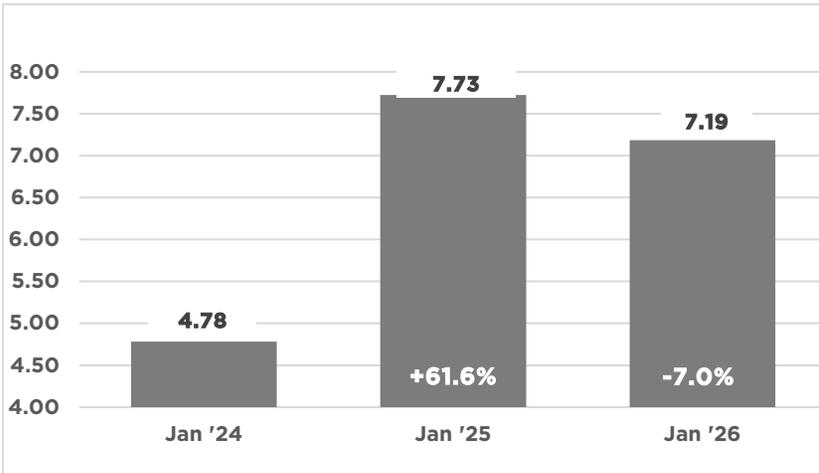


Mortgage Rates		Prior yr	Change
Jan '25	6.85%	6.51%	5.2%
Feb '25	6.69%	6.55%	2.0%
Mar '25	6.55%	6.71%	-2.4%
Apr '25	6.64%	6.91%	-3.9%
May '25	6.78%	6.58%	3.1%
Jun '25	6.68%	6.69%	-0.2%
Jul '25	6.46%	6.65%	-2.8%
Aug '25	6.35%	6.09%	4.3%
Sep '25	6.05%	5.89%	2.8%
Oct '25	6.02%	6.40%	-6.0%
Nov '25	6.05%	6.69%	-9.4%
Dec '25	6.04%	6.53%	-7.5%
Jan '26	6.00%	6.85%	-12.4%

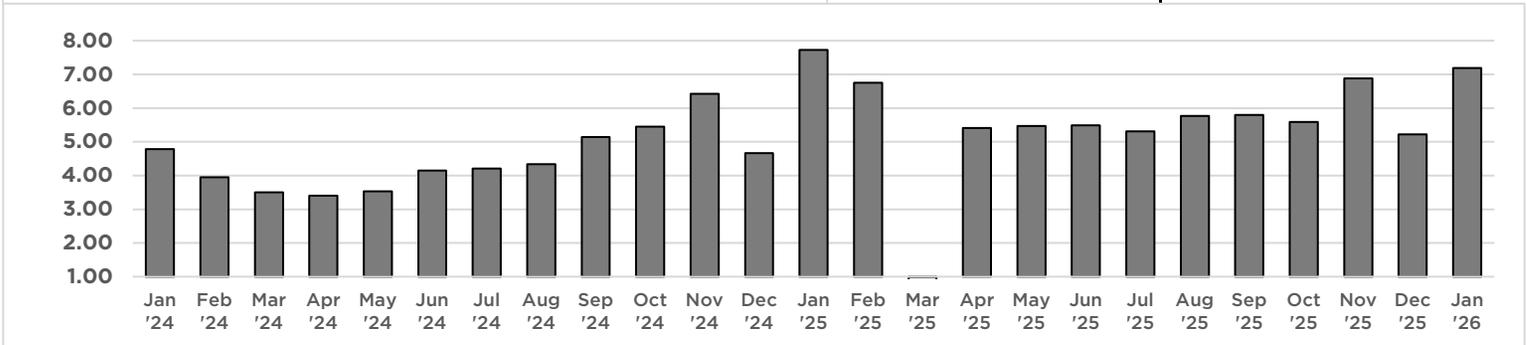


Months of Supply

Approximate number of months to deplete inventory, based on current sales



Months of Supply		Prior yr	Change
Jan '25	7.73	4.78	61.6%
Feb '25	6.76	3.95	71.0%
Mar '25	0.00	3.51	-100.0%
Apr '25	5.41	3.40	59.2%
May '25	5.47	3.53	54.8%
Jun '25	5.49	4.15	32.2%
Jul '25	5.31	4.21	26.3%
Aug '25	5.77	4.34	33.1%
Sep '25	5.79	5.14	12.7%
Oct '25	5.59	5.45	2.6%
Nov '25	6.88	6.43	7.0%
Dec '25	5.22	4.67	11.9%
Jan '26	7.19	7.73	-7.0%

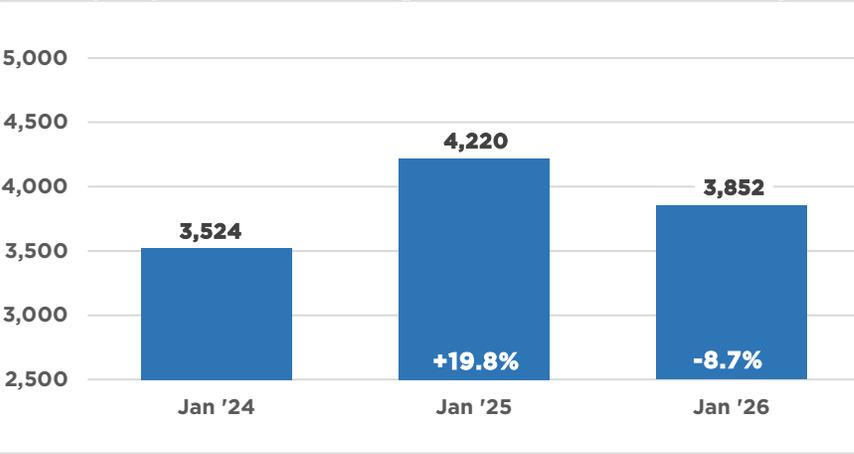




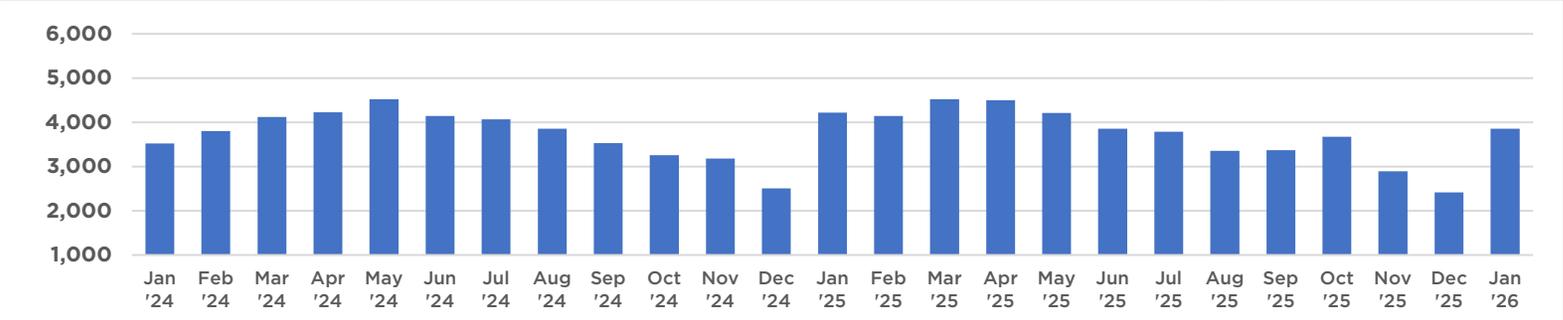
January 2026

New Listings

New properties entering the market in January

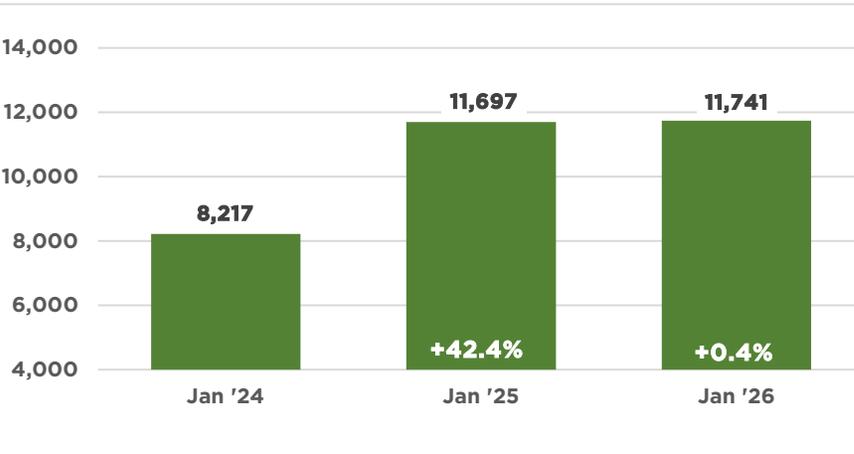


	New Listings	Prior year	Change
Jan '25	4,220	3,524	19.8%
Feb '25	4,140	3,799	9.0%
Mar '25	4,521	4,124	9.6%
Apr '25	4,503	4,230	6.5%
May '25	4,208	4,521	-6.9%
Jun '25	3,854	4,143	-7.0%
Jul '25	3,788	4,067	-6.9%
Aug '25	3,353	3,856	-13.0%
Sep '25	3,371	3,530	-4.5%
Oct '25	3,676	3,260	12.8%
Nov '25	2,891	3,185	-9.2%
Dec '25	2,415	2,510	-3.8%
Jan '26	3,852	4,220	-8.7%

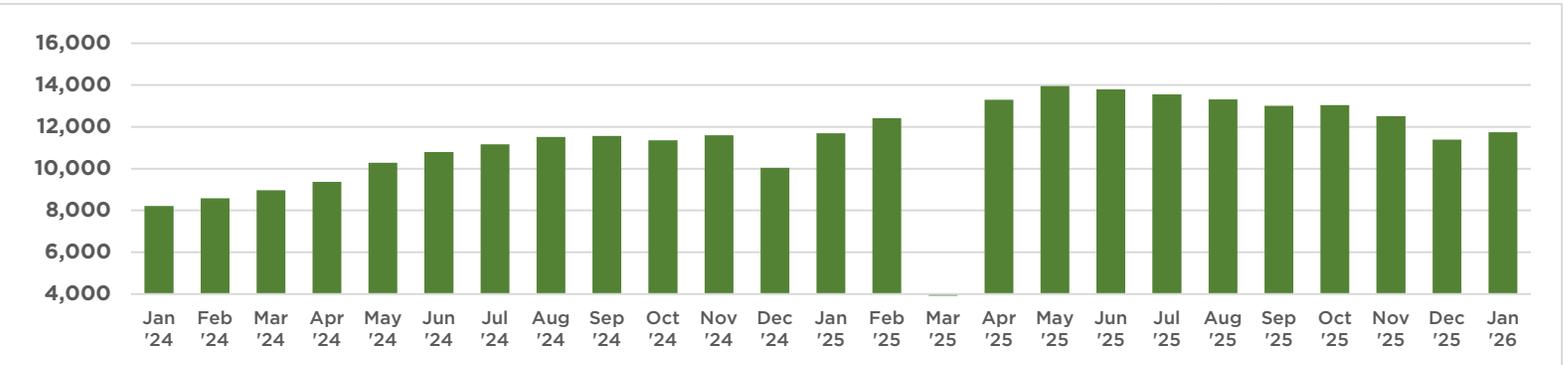


Inventory

Number of properties currently available on the market



	Inventory	Prior year	Change
Jan '25	11,697	8,217	42.4%
Feb '25	12,411	8,589	44.5%
Mar '25	0	8,971	-100.0%
Apr '25	13,304	9,376	41.9%
May '25	13,957	10,282	35.7%
Jun '25	13,793	10,796	27.8%
Jul '25	13,557	11,158	21.5%
Aug '25	13,306	11,511	15.6%
Sep '25	13,007	11,560	12.5%
Oct '25	13,047	11,357	14.9%
Nov '25	12,516	11,604	7.9%
Dec '25	11,389	10,049	13.3%
Jan '26	11,741	11,697	0.4%

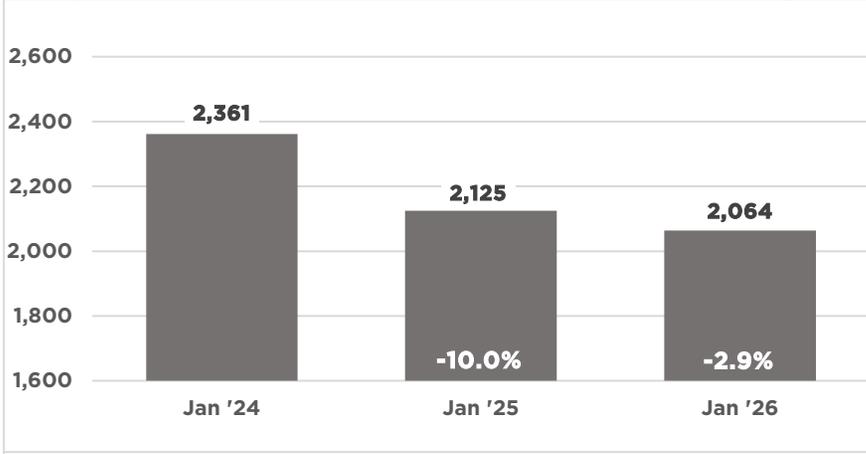




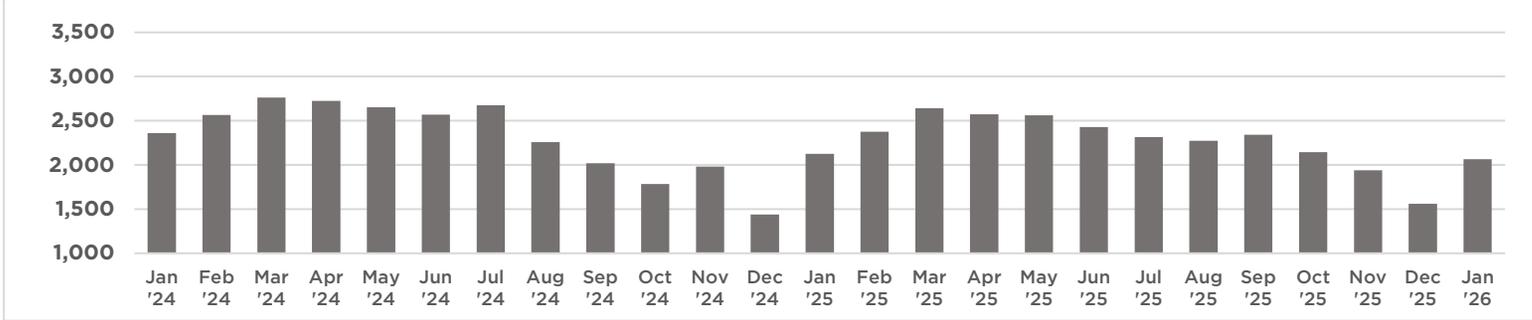
January 2026

New Contracts

Properties that went under contract in January

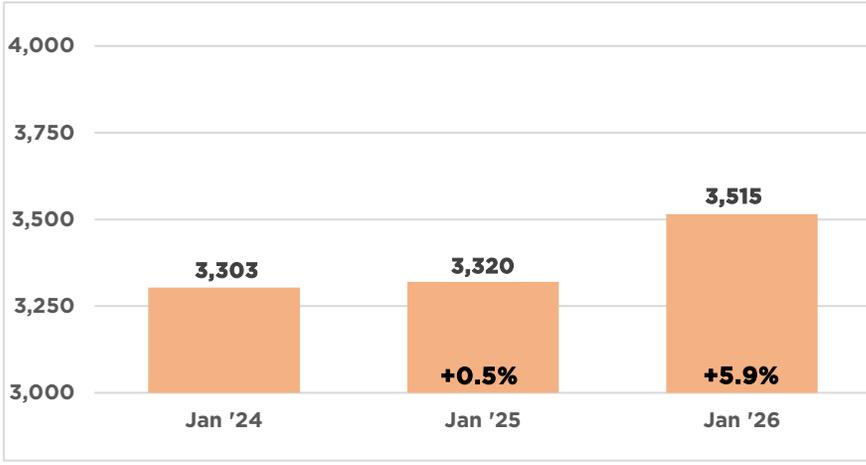


	New Contracts	Prior year	Change
Jan '25	2,125	2,361	-10.0%
Feb '25	2,377	2,564	-7.3%
Mar '25	2,640	2,764	-4.5%
Apr '25	2,573	2,725	-5.6%
May '25	2,560	2,653	-3.5%
Jun '25	2,430	2,570	-5.4%
Jul '25	2,316	2,676	-13.5%
Aug '25	2,275	2,259	0.7%
Sep '25	2,343	2,020	16.0%
Oct '25	2,144	1,784	20.2%
Nov '25	1,941	1,981	-2.0%
Dec '25	1,561	1,438	8.6%
Jan '26	2,064	2,125	-2.9%

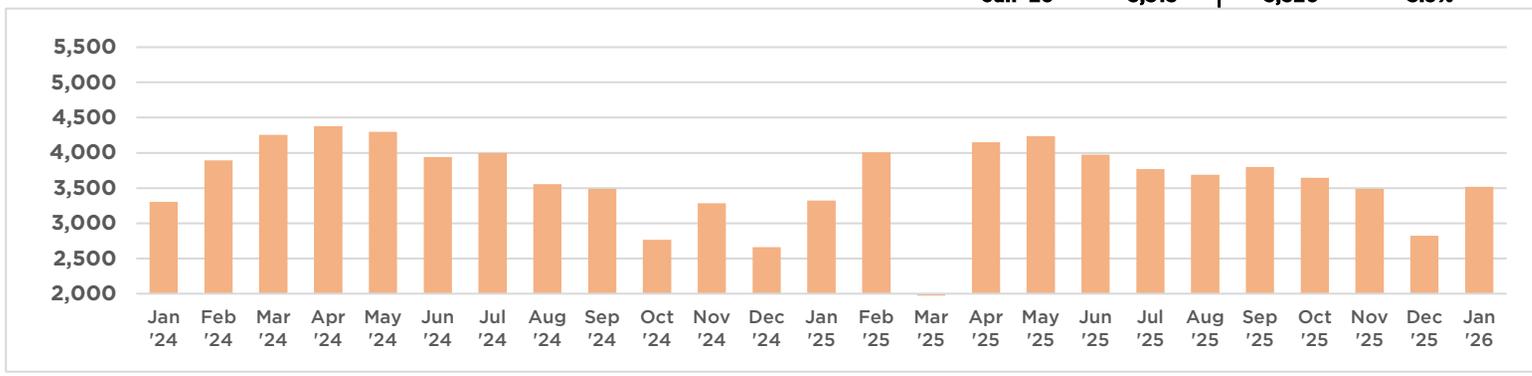


Pending Properties

Total number of properties under contract



	Pending Properties	Prior year	Change
Jan '25	3,320	3,303	0.5%
Feb '25	4,006	3,891	3.0%
Mar '25	0	4,257	-100.0%
Apr '25	4,151	4,379	-5.2%
May '25	4,238	4,298	-1.4%
Jun '25	3,976	3,940	0.9%
Jul '25	3,771	3,999	-5.7%
Aug '25	3,687	3,556	3.7%
Sep '25	3,798	3,490	8.8%
Oct '25	3,648	2,767	31.8%
Nov '25	3,489	3,285	6.2%
Dec '25	2,825	2,661	6.2%
Jan '26	3,515	3,320	5.9%

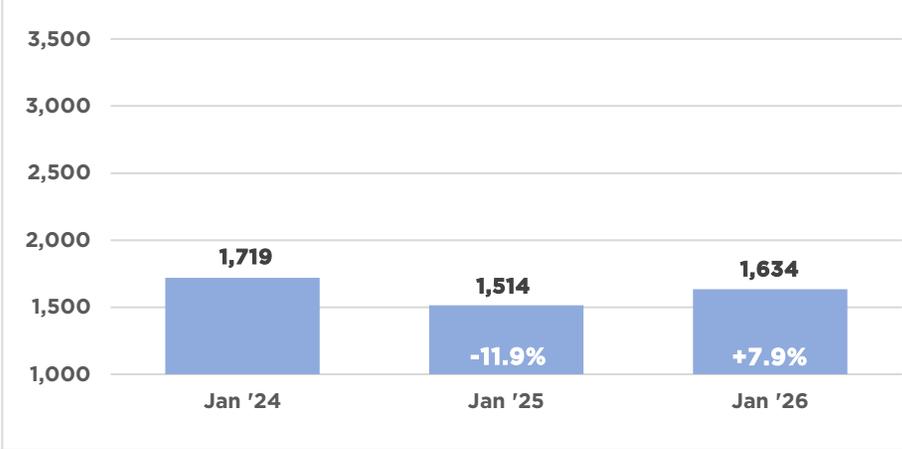




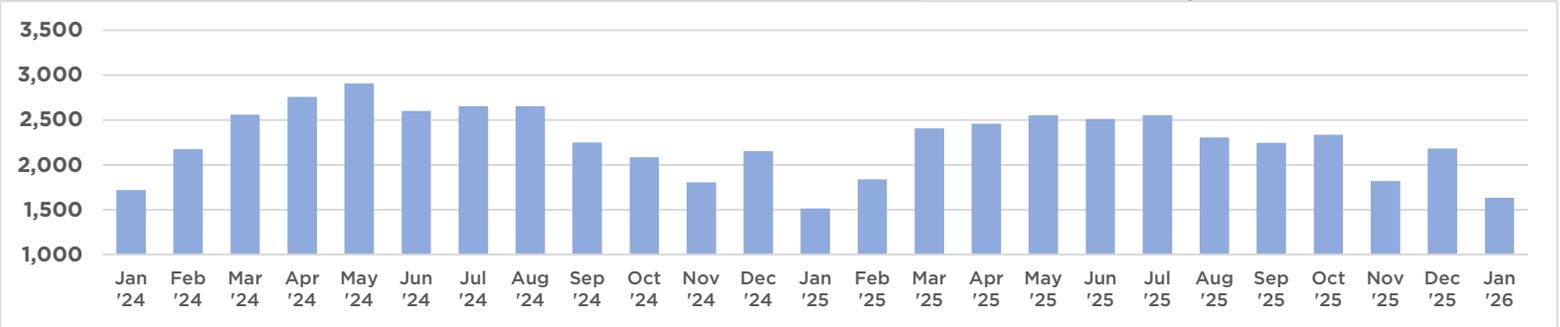
January 2026

Closed Sales

Properties that closed in January

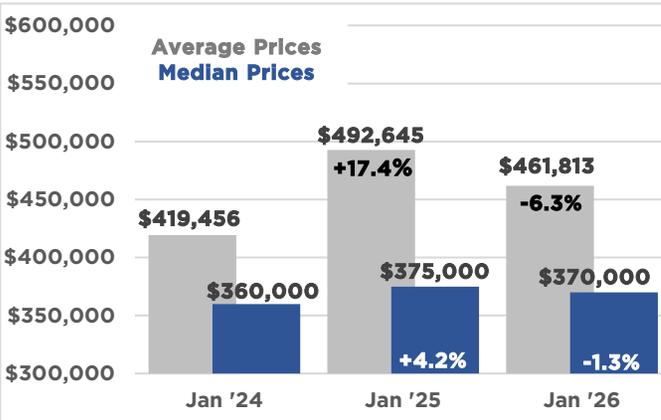


	Closed Sales	Prior year	Change
Jan '25	1,514	1,719	-11.9%
Feb '25	1,837	2,174	-15.5%
Mar '25	2,408	2,559	-5.9%
Apr '25	2,459	2,759	-10.9%
May '25	2,551	2,909	-12.3%
Jun '25	2,513	2,601	-3.4%
Jul '25	2,551	2,652	-3.8%
Aug '25	2,306	2,655	-13.1%
Sep '25	2,245	2,249	-0.2%
Oct '25	2,335	2,085	12.0%
Nov '25	1,820	1,805	0.8%
Dec '25	2,182	2,154	1.3%
Jan '26	1,634	1,514	7.9%



Average & Median Prices

Sold Property prices



	Avg Price	Prior year	Change	Median Price	Prior year	Change
Jan '25	\$492,645	\$419,456	17.4%	\$375,000	\$360,000	4.2%
Feb '25	\$486,064	\$448,291	8.4%	\$385,000	\$377,000	2.1%
Mar '25	\$485,644	\$479,995	1.2%	\$385,500	\$386,500	-0.3%
Apr '25	\$476,374	\$475,122	0.3%	\$389,900	\$388,500	0.4%
May '25	\$495,763	\$482,295	2.8%	\$390,000	\$385,000	1.3%
Jun '25	\$494,686	\$489,845	1.0%	\$390,000	\$395,000	-1.3%
Jul '25	\$479,697	\$469,630	2.1%	\$389,999	\$390,000	0.0%
Aug '25	\$485,278	\$465,562	4.2%	\$382,950	\$384,500	-0.4%
Sep '25	\$483,029	\$483,137	0.0%	\$378,000	\$380,000	-0.5%
Oct '25	\$482,548	\$477,404	1.1%	\$380,000	\$388,990	-2.3%
Nov '25	\$467,682	\$466,166	0.3%	\$385,000	\$380,000	1.3%
Dec '25	\$482,267	\$464,525	3.8%	\$380,313	\$380,000	0.1%
Jan '26	\$461,813	\$492,645	-6.3%	\$370,000	\$375,000	-1.3%

