

ISG WORLD<sup>®</sup>  
**MIAMI REPORT**<sup>™</sup>



Q4  
2025

# HEADLINES

IN  
THE  
NEWS.



SOUTH FLORIDA  
BUSINESS JOURNAL

Miami beats New York for world's top second-home destination for ultra-wealthy

– AUGUST 2025



FOX  
BUSINESS

Florida now home to America's most expensive ZIP code, leaving California in second place

– AUGUST 2025



yahoo!  
finance

South Florida Real Estate Posts Second-Most \$10M & Up Home Sales in History

– JANUARY 2026

# 2020–2025 Total Sales Transactions Above \$10 Million

Single-Family Homes and Condos in Miami-Dade, Broward and Palm Beach Counties



South Florida Sold Approximately One \$10 Million-Plus Home Per Day In 2025

— Nearly Double The Volume Recorded Pre-Covid

RECORD YEAR:

**2021**

TRANSACTIONS:

**415**

TOTAL TRANSACTIONS BASED ON PENDING DATES

# 2020–2025 Total Sales Transactions Above \$30 Million

Single-Family Homes and Condos in Miami-Dade, Broward and Palm Beach Counties

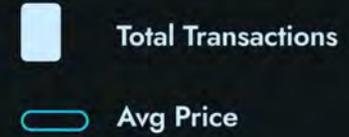


**2025**  
**NEW RECORD**  
PREVIOUS RECORD - 2021

TOTAL TRANSACTIONS BASED ON  
PENDING DATES

# 2020–2025 Total Sales Transactions Above \$50 Million

Single-Family Homes and Condos in Miami-Dade, Broward and Palm Beach Counties



**2025**  
**NEW RECORD**  
PREVIOUS RECORD - 2021

TOTAL TRANSACTIONS BASED ON PENDING DATES



DEVELOPERS CLOSE OUT 2025  
WITH MIAMI'S LARGEST-EVER  
LAND DEAL

## NEW RECORD



# \$520 MILLION WATERFRONT DEAL IN BRICKELL

4.25 ACRES | \$122M P/ACRE

Oak Row Equities And OKO Group Close  
Florida's Largest Land Acquisition.

—December 2025



Vlad Doronin  
Founder & CEO, Oko Group

## PREVIOUS RECORDS



2022

**Ken Griffin**  
Acquired A Record-Setting  
Waterfront Land Assemblage  
In Miami.

**\$363M**



2011

**Genting Group**  
Secured A Major  
Downtown Miami  
Waterfront Site.

**\$236M**



Miami Dade  
Broward  
Palm Beach Counties

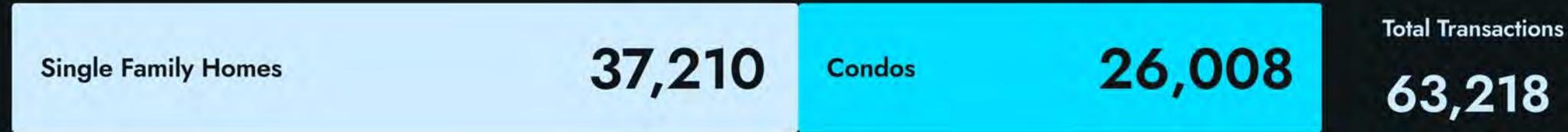
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# MLS

# 2023–2025 Total Transactions For Single-Family Homes And Condos

Miami-Dade, Broward and Palm Beach Counties

2023



2024



2025



# 2023–2025 Total Sales Volume For Single-Family Homes And Condos

Miami-Dade, Broward and Palm Beach Counties





Miami Dade  
Broward  
Palm Beach Counties

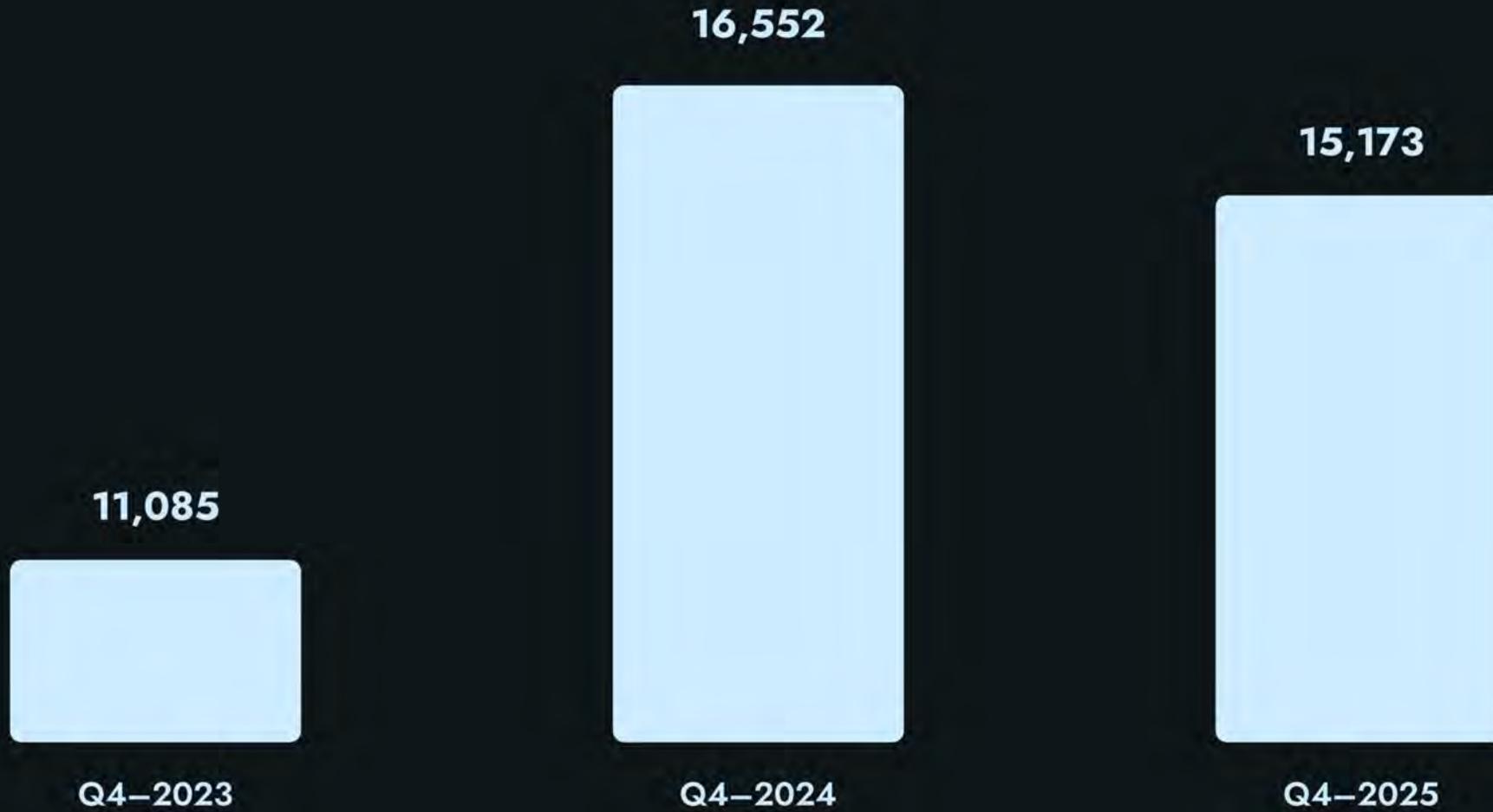
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# MLS RESALES SINGLE FAMILY HOMES

# Single-Family Homes: Total Active Listings

Miami-Dade, Broward and Palm Beach Counties

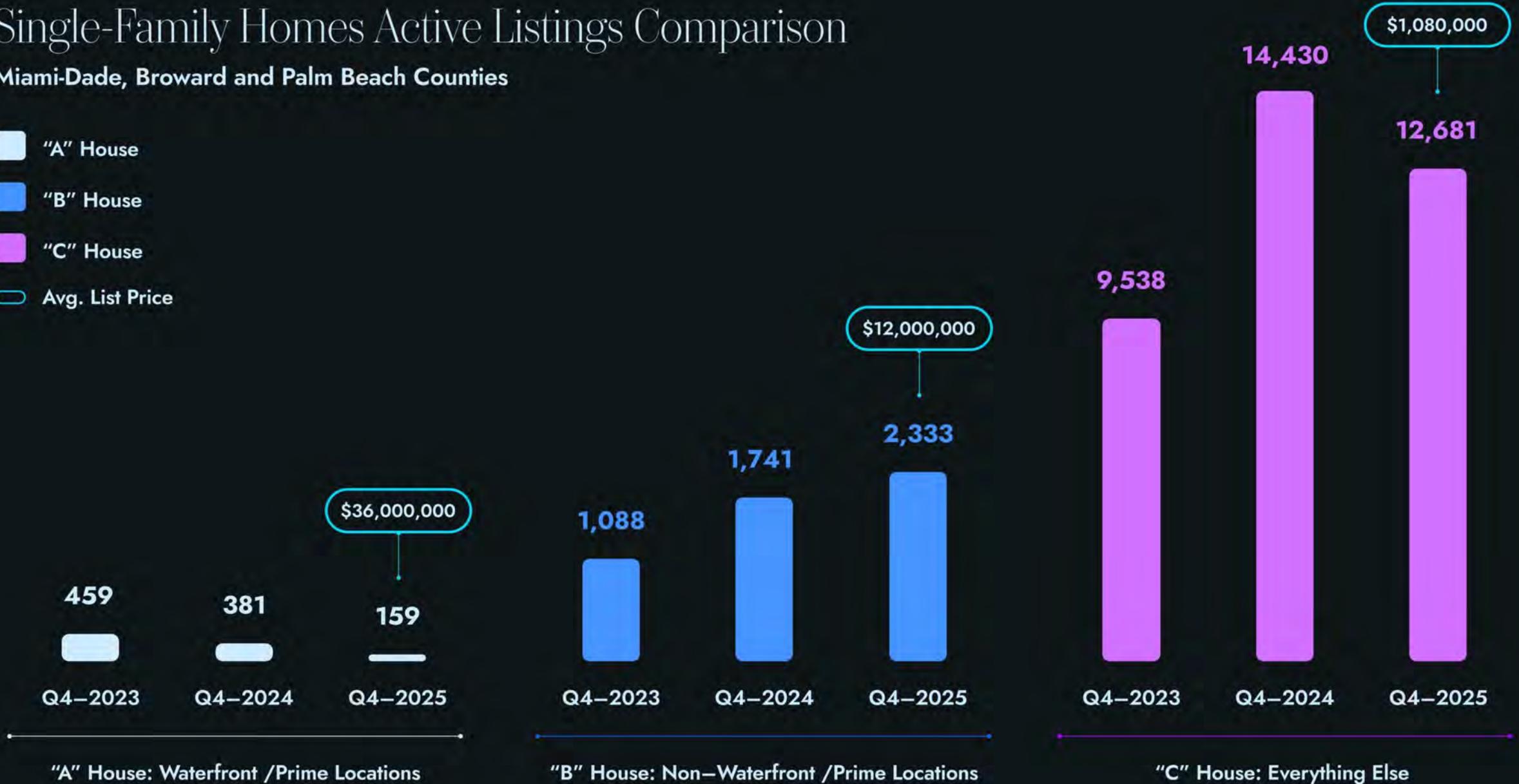
 Total Active Listings



# Single-Family Homes Active Listings Comparison

Miami-Dade, Broward and Palm Beach Counties

- "A" House
- "B" House
- "C" House
- Avg. List Price





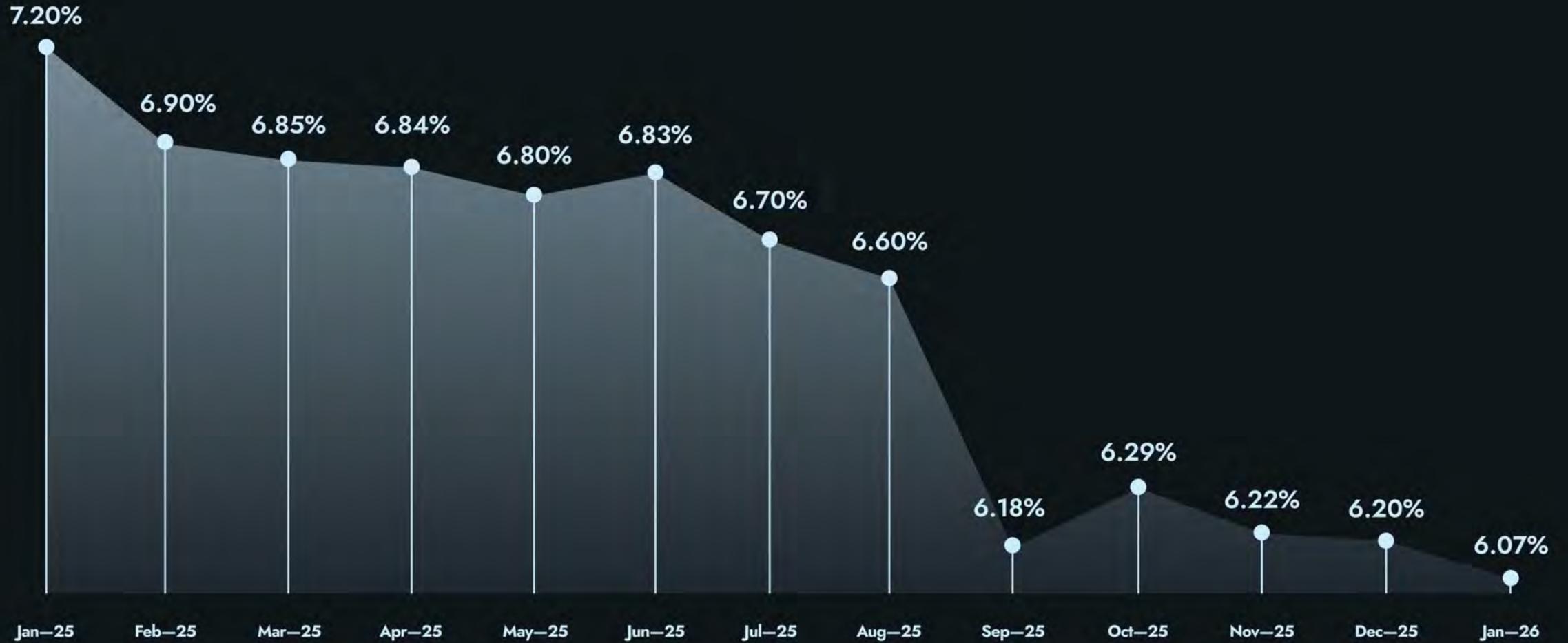
Miami Dade  
Broward  
Palm Beach Counties

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# MLS RESALES CONDOS

# 30-Year Fixed Rate

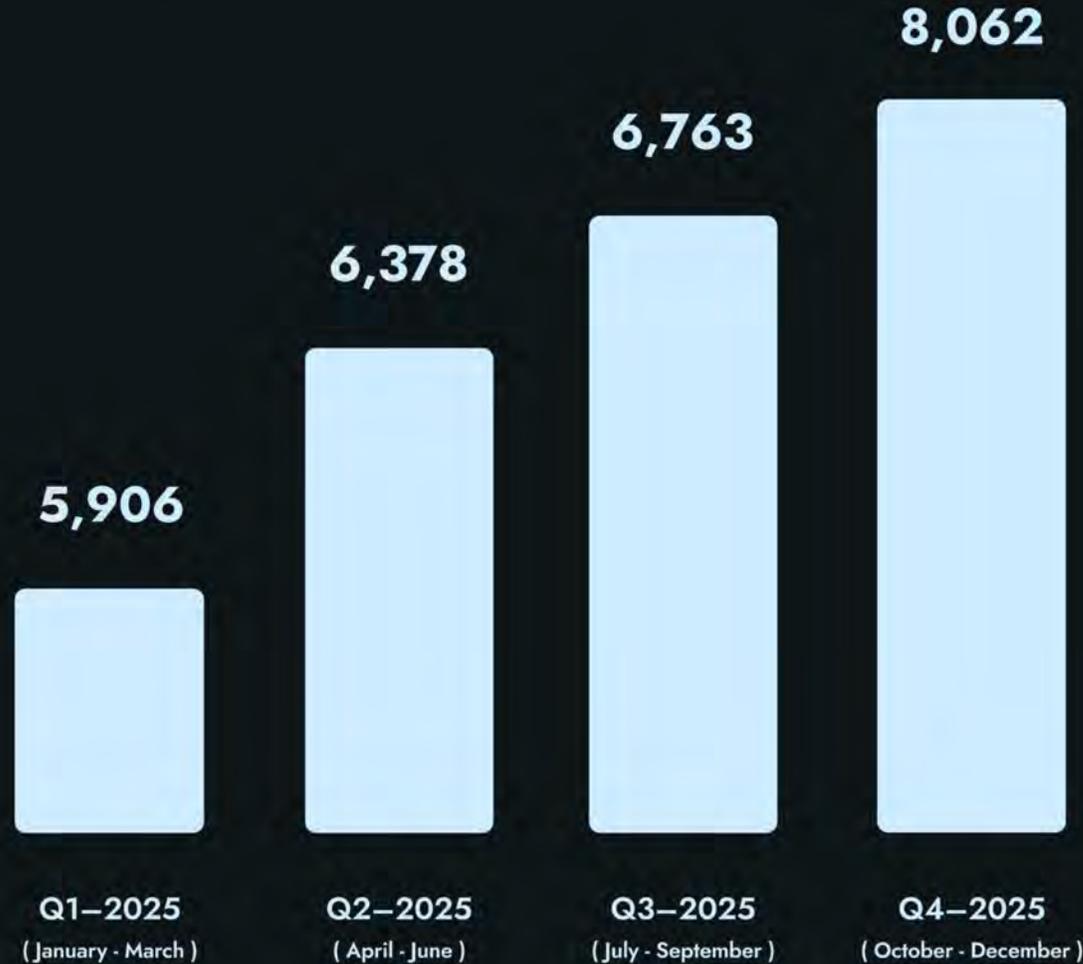
(Blended Average of MND, MBA & Freddie Mac)



# 2025 Total Condo Sales Transactions

Miami-Dade, Broward and Palm Beach Counties

 Total Transactions



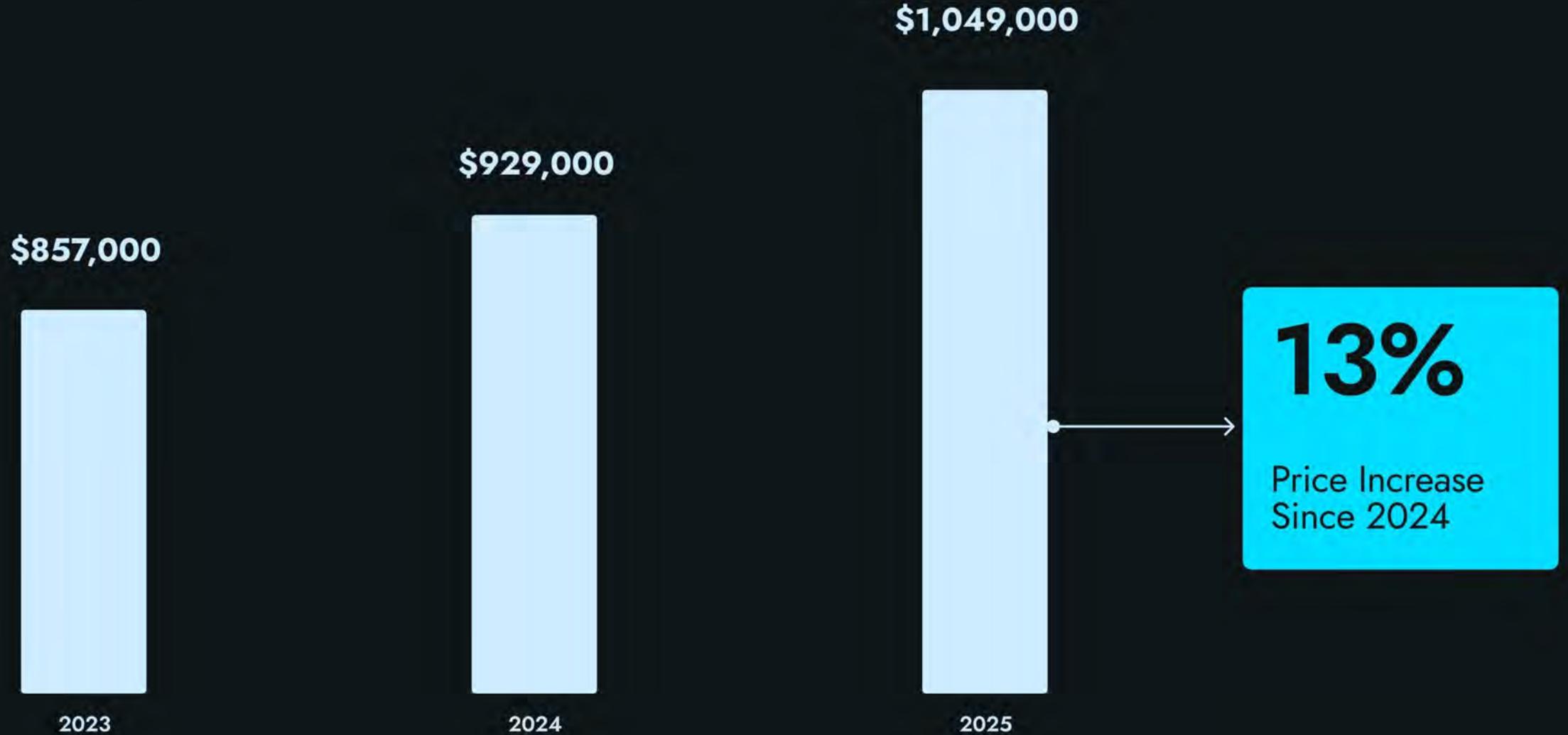
**27,109**  
Total Transactions  
January - December 2025

**23,989**  
Total Transactions  
January - December 2024

# 2023-2025 Average Price Analysis For Condos

Miami-Dade, Broward and Palm Beach Counties

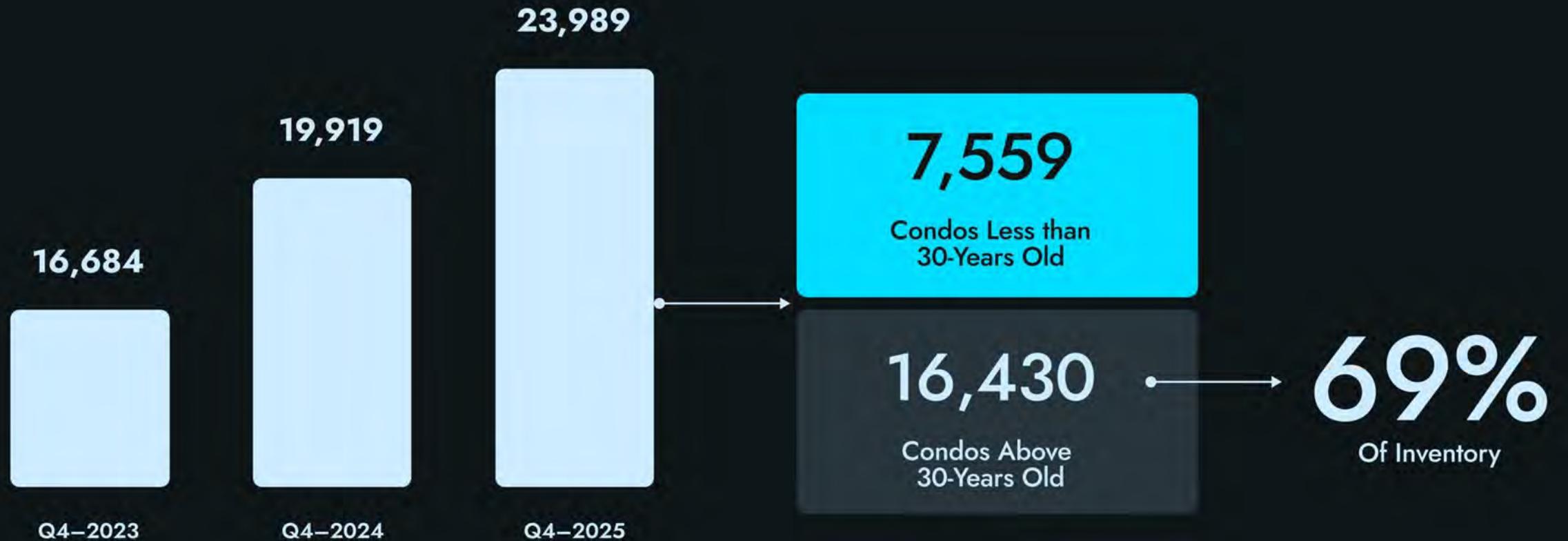
 Avg Price



# Total Active Condo Units

Miami-Dade, Broward and Palm Beach Counties

 Total Condo Units





Miami Dade  
Broward  
Palm Beach Counties

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# NEW CONSTRUCTION

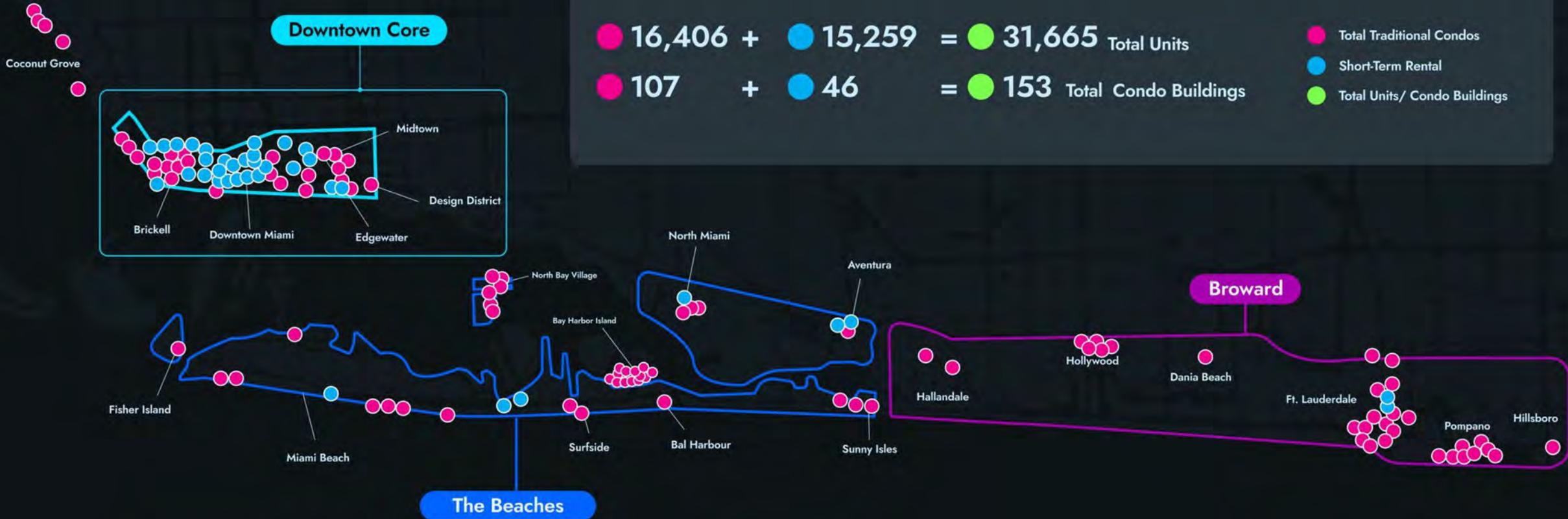
# South Florida Pre-Construction Developments

As of December 2025

● 16,406 + ● 15,259 = ● 31,665 Total Units

● 107 + ● 46 = ● 153 Total Condo Buildings

- Total Traditional Condos
- Short-Term Rental
- Total Units/ Condo Buildings



## Downtown Core

(Brickell, Downtown Miami & Edgewater)

● 6,884 + ● 13,765 = ● 20,649 Total Units  
 ● 33 + ● 37 = ● 70 Total Buildings

## The Beaches

(Miami Beach, North Bay Village, North Miami, Bay Harbor Islands, Bal Harbour, Surfside, Sunny Isles & Aventura)

● 4,276 + ● 989 = ● 5,265 Total Units  
 ● 41 + ● 7 = ● 48 Total Buildings

## Broward

(Hallandale, Hollywood, Dania Beach, Fort Lauderdale, Pompano Beach & Hillsboro)

● 5,246 + ● 505 = ● 5,751 Total Units  
 ● 33 + ● 2 = ● 35 Total Buildings

# 20 Year Condo Delivery Analysis For Traditional Condos

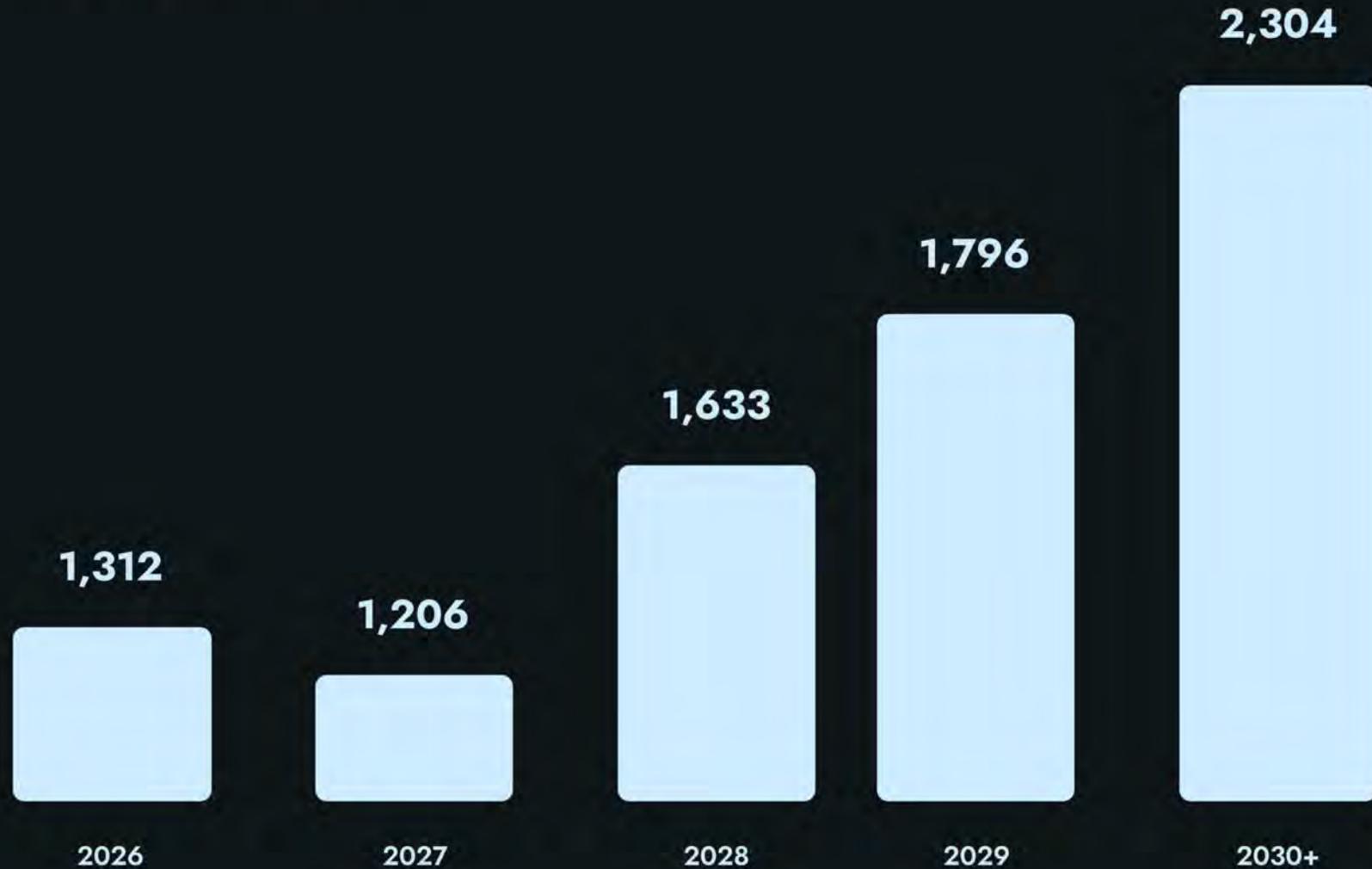
 No. Units  
 Condo Developments



Under Construction  
**54 / 8,251**

# Total Units Being Delivered For Traditional Condos Released For Sale Since 2021

 Total Condo Units



Total Units Under Construction:

**8,251 Units**

% Sold:

**60% Sold**

Unsold:

**3,300 Unsold Units**



Miami Dade  
Broward  
Palm Beach Counties

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# DEMAND

# 2025 Population Change By Region

Source: U.S Census Bureau

\*Estimates



West



Population  
Increase by:

**687,607** ↑



Midwest



Population  
Increase by:

**434,632** ↑



Northeast



Population  
Increase by:

**410,183** ↑



Southeast



Population  
Increase by:

**1,772,335** ↑

Total Population Gain 2025: 3,305,206 | 54% In Southeast

# Florida's Historic Year Daily Population Growth



# 2025

Record Breaking  
Daily Population  
Growth

# South Florida: New-To-Market Trends

205 Companies Occupying 3.4 Million SF Have Moved to South Florida since 2020

 – Notable Company Relocation to South Florida

Notable Companies Relocated to South Florida



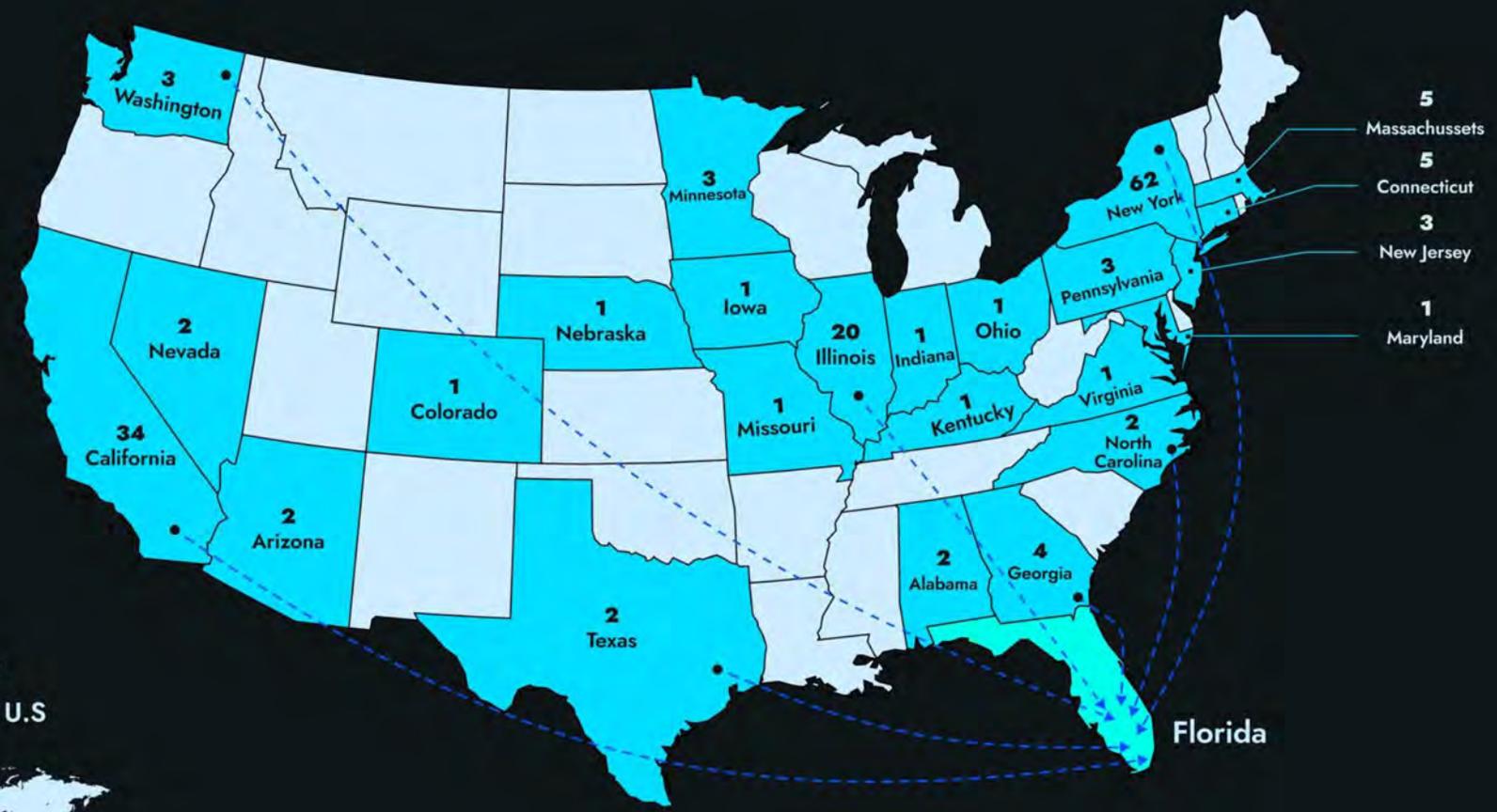
Blackstone

KIRKLAND & ELLIS



Goldman Sachs

millennium



Source: CBRE Research, June 2025



Guest Speaker

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# ANA BOZOVIC

Analytics Miami  
Founder



Coming In 2026 To Miami



FIFA World Cup 2026

Jun 11, 2026 – Jul 19, 2026



G20 Summit

December 14–15, 2026