



OAHU MARKET REPORT

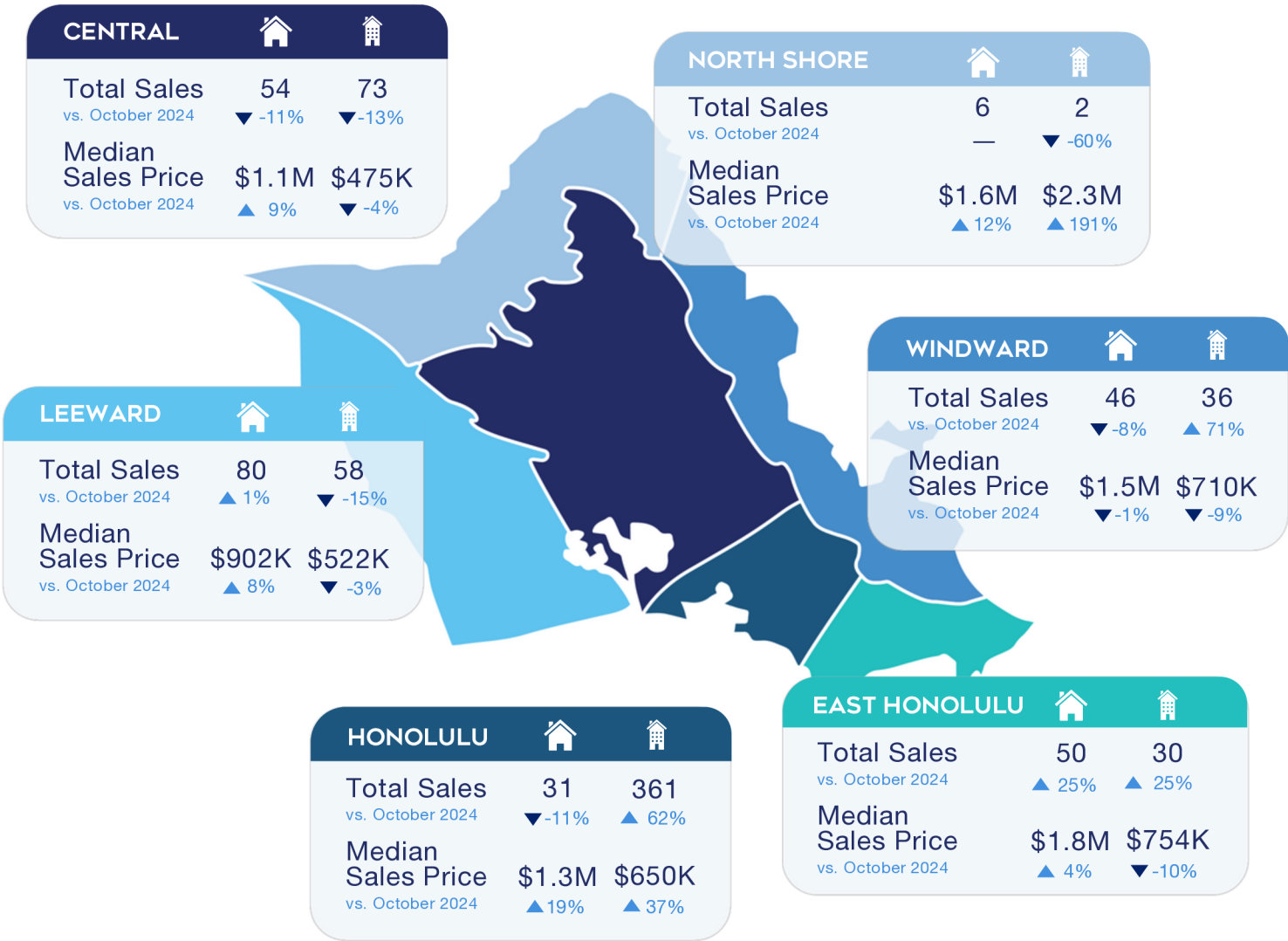
OCTOBER 2025

O'ahu's housing market remained resilient in October, with activity holding above last year's levels across both single-family and condo segments. Buyer engagement stayed steady despite ongoing affordability pressures, supported by balanced inventory and improving sentiment following the Federal Reserve's September rate cuts, which are gradually easing borrowing conditions. Well-priced properties continued to attract motivated buyers, while sellers aligned with current market expectations are seeing consistent movement as the fall season progresses.

ISLAND-WIDE OVERVIEW

	TOTAL SALES	MEDIAN SOLD PRICE	% LIST PRICE RECEIVED	SOLD ABOVE LIST PRICE	MEDIAN DAYS ON MARKET	NEW LISTINGS
SINGLE-FAMILY HOMES	267	\$1,150,000	98%	28%	26	323
CONDOMINIUMS	560	\$590,000	98%	10%	29	791

ISLAND-WIDE OVERVIEW



SINGLE-FAMILY HOME TRANSACTIONS

OCTOBER 2025 VS. PERCENT CHANGE OVER LAST YEAR



Single-family home sales held firm in October with 267 closed sales, landing just slightly below September and reflecting a 3% increase year-over-year. The median sales price settled at \$1,150,000, down 4% from last October, suggesting a bit more breathing room for buyers after last year's peak pricing. Homes continued moving at a healthy pace, especially in desirable neighborhoods with limited supply, where competitively priced listings are still drawing strong interest.

			MEDIAN			% LIST PRICE		SOLD ABOVE					
TOTAL SALES			SOLD PRICE			RECEIVED		MEDIAN DOM		LIST PRICE		LIVING \$/SQ FT	
CENTRAL	Aiea	8	▼ -47%	\$1,246,500	▲ 4%	97%	▼ -4%	20	▲ 67%	38%	▼ -20%	\$525	▼ -24%
	Honolulu	4	▲ 100%	\$1,257,500	▲ 0%	102%	▲ 4%	13	▼ -77%	50%	—	\$722	▼ -1%
	Mililani	12	▼ -29%	\$1,135,000	▲ 18%	98%	▼ 2%	48	▲ 243%	17%	▼ -60%	\$654	▼ -6%
	Pearl City	13	— 0%	\$1,080,000	▲ 11%	99%	▼ .1%	15	▲ 36%	46%	— 0%	\$637	▼ -1%
	Wahiawa	4	▲ 33%	\$757,500	▼ -8%	102%	▲ 1%	38	▲ 150%	75%	▲ 13%	\$626	▼ -22%
	Waipahu	13	▲ 18%	\$916,000	▼ -3%	99%	▼ 0%	10	▼ -9%	38%	▼ -15%	\$670	▲ 36%
NORTH SHORE	Haleiwa	3	▲ 200%	\$1,775,000	▼ -37%	92%	▼ -6%	91	▲ 133%	0%	—	\$895	▼ -32%
	Kahuku	2	—	\$1,127,500	—	93%	—	18	—	0%	—	\$1,174	—
	Laie	1	— 0%	\$1,960,000	▲ 250%	99%	▲ 6%	94	— 0%	0%	—	\$1,128	—
EAST HONOLULU	Honolulu	50	▲ 25%	\$1,765,000	▲ 4%	98%	▼ .1%	18	▲ 3%	24%	▼ -20%	\$885	▼ -16%
HONOLULU	Honolulu	31	▼ -9%	\$1,250,000	▲ 13%	97%	▼ 0%	35	▲ 30%	29%	▲ 65%	\$660	▲ 5%
LEEWARD	Ewa Beach	42	▼ -2%	\$932,500	▲ 7%	99%	▼ 0%	27	▲ 59%	26%	▼ -30%	\$634	▲ 1%
	Kapolei	18	▲ 13%	\$1,003,054	▲ 2%	99%	▼ 0%	30	▲ 168%	11%	▼ -70%	\$578	▼ -14%
	Waianae	20	— 0%	\$667,500	▼ -3%	93%	▼ -6%	28	▼ -30%	25%	▼ -13%	\$397	▼ -26%
WINDWARD	Hauula	3	▲ 50%	\$1,167,100	▼ -5%	96%	▼ .1%	69	▲ 18%	0%	—	\$480	▼ -13%
	Kaaawa	1	— 0%	\$1,400,000	▲ 33%	89%	▼ -3%	168	▲ 1767%	0%	—	\$883	▼ -23%
	Kailua	26	▲ 30%	\$1,675,000	▼ -5%	97%	▼ -4%	21	▲ 75%	31%	▼ -23%	\$1,148	▲ 18%
	Kaneohe	15	▼ -42%	\$986,000	▼ -26%	98%	▼ .1%	12	▼ -54%	40%	▲ 30%	\$787	▲ 5%
	Waimanalo	1	— 0%	\$2,450,000	▼ -49%	100%	▲ 0%	45	▲ 309%	0%	—	\$1,225	▼ -35%
GRAND TOTAL		267	▲ 0%	\$1,150,000	▲ 9%	98%	▼ -2%	26	▲ 53%	28%	▼ -17%	\$735	▼ -3%

CONDOMINIUM TRANSACTIONS

OCTOBER 2025 VS. PERCENT CHANGE OVER LAST YEAR

Condo activity remained elevated in October, with 560 sales, including 119 closings at The Park on Keeaumoku, which continued to boost transaction volume following September's surge. The median price held at \$590,000, down 3% year-over-year, offering slightly improved entry points for buyers compared to last fall. Demand remained strongest for well-located units favored by first-time buyers and local owner-occupants, and recent rate relief may help sustain momentum into year-end.

		TOTAL SALES		MEDIAN SOLD PRICE		% LIST PRICE RECEIVED		MEDIAN DOM		SOLD ABOVE LIST PRICE		LIVING \$/SQ FT	
CENTRAL	Aiea	20	▼ -5%	\$545,000	▲ 2%	99%	▼ 0%	26	▲ 11%	10%	▼ -65%	\$528	▼ -7%
	Honolulu	1	▼ -50%	\$499,000	▼ -19%	100%	▲ 3%	158	▲ 690%	0%	—	\$547	▼ -20%
	Mililani	30	▼ -23%	\$508,000	— 0%	99%	▼ -1%	30	▲ 43%	23%	▼ -30%	\$575	▲ 0%
	Pearl City	6	▲ 20%	\$381,500	▲ 5%	100%	▲ 2%	42	▲ 62%	50%	—	\$584	▲ 9%
	Wahiawa	1	—	\$372,000	—	100%	—	47	—	0%	—	\$422	—
NORTH SHORE	Waipahu	15	▼ -12%	\$368,000	▼ -24%	100%	▼ -1%	33	▲ 154%	20%	▼ -51%	\$603	▼ -8%
	Kahuku	1	▼ -67%	\$4,290,000	▲ 112%	102%	▲ 2%	49	▲ 1125%	100%	—	\$2,789	▲ 99%
	Waialua	1	▼ -50%	\$339,000	▼ -38%	100%	▼ -1%	42	▲ 105%	0%	▼ -100%	\$890	▲ 28%
EAST HONOLULU	Honolulu	30	▲ 25%	\$754,500	▼ -10%	96%	▼ -3%	45	▲ 329%	17%	— 0%	\$696	▼ -35%
HONOLULU	Honolulu	361	▲ 62%	\$650,000	▲ 37%	98%	▲ 0%	23	▼ -34%	6%	▼ -46%	\$976	▲ 22%
LEEWARD	Ewa Beach	29	▼ -12%	\$525,000	▼ -10%	100%	▼ -1%	32	▲ 14%	24%	▼ -34%	\$617	▲ 3%
	Kapolei	19	▼ -17%	\$680,000	▲ 12%	99%	▼ 0%	51	▲ 50%	11%	▼ -65%	\$669	▼ -4%
	Waianae	10	▼ -17%	\$204,889	▼ -10%	99%	▲ 3%	49	▲ 100%	20%	▲ 20%	\$312	▼ -18%
WINDWARD	Hauula	2	—	\$263,000	—	98%	—	28	—	0%	—	\$631	—
	Kailua	14	▲ 56%	\$827,500	▲ 5%	98%	▼ -1%	28	▲ 45%	14%	▼ -36%	\$790	▲ 11%
	Kaneohe	20	▲ 67%	\$582,500	▼ -20%	99%	▼ 0%	19	▲ 90%	20%	▼ -70%	\$609	▼ -11%
GRAND TOTAL		560	▲ 32%	\$590,000	▲ 12%	98%	▼ 0%	29	▲ 14%	10%	▼ -48%	\$837	▲ 13%

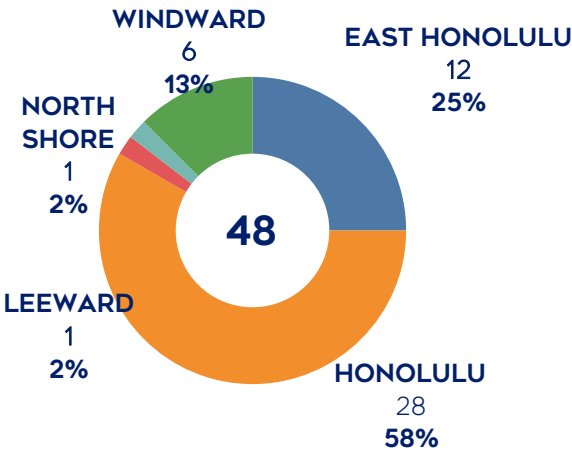
LUXURY TRANSACTIONS FOR OCTOBER 2025

FOR SINGLE-FAMILY HOME SALES OVER \$2.5M AND CONDO SALES OVER \$1.5M

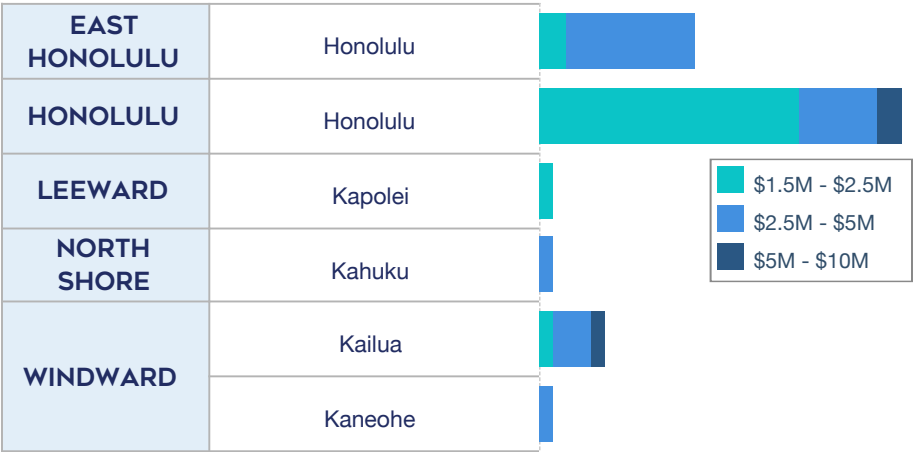
SINGLE-FAMILY HOME SALES		TOTAL SALES	TOTAL VOLUME	AVERAGE SOLD PRICE	MEDIAN SOLD PRICE	% LIST PRICE RECEIVED	MEDIAN DOM	BID-UPS	LIVING \$/SQ FT
EAST HONOLULU	Honolulu	10	\$35,490,000	\$3,549,000	\$3,450,000	96%	27	10%	\$985
HONOLULU	Honolulu	3	\$9,109,519	\$3,036,506	\$2,554,719	94%	35	0%	\$778
WINDWARD	Kailua	4	\$18,090,000	\$4,522,500	\$3,725,000	95%	93	0%	\$2,123
	Kaneohe	1	\$3,300,000	\$3,300,000	\$3,300,000	103%	10	100%	\$1,495
GRAND TOTAL		18	\$65,989,519	\$3,666,084	\$3,450,000	96%	33	11%	\$1,129

CONDO SALES		TOTAL SALES	TOTAL VOLUME	AVERAGE SOLD PRICE	MEDIAN SOLD PRICE	% LIST PRICE RECEIVED	MEDIAN DOM	BID-UPS	LIVING \$/SQ FT
NORTH SHORE	Kahuku	1	\$4,290,000	\$4,290,000	\$4,290,000	102%	49	100%	\$2,789
EAST HONOLULU	Honolulu	2	\$3,565,000	\$1,782,500	\$1,782,500	99%	12	50%	\$969
HONOLULU	Honolulu	25	\$51,504,000	\$2,060,160	\$1,598,000	98%	0	0%	\$1,476
LEEWARD	Kapolei	1	\$1,575,000	\$1,575,000	\$1,575,000	99%	27	0%	\$918
WINDWARD	Kailua	1	\$1,600,000	\$1,600,000	\$1,600,000	95%	25	0%	\$873
GRAND TOTAL		30	\$62,534,000	\$2,084,467	\$1,599,000	98%	12	7%	\$1,433

TOTAL LUXURY SALES BY DISTRICT



LUXURY SALES BY PRICE RANGE



* The information in this report is deemed reliable but not guaranteed. Data provided by the REALTORS® Association of Maui as of 11/01/25 and is subject to change.