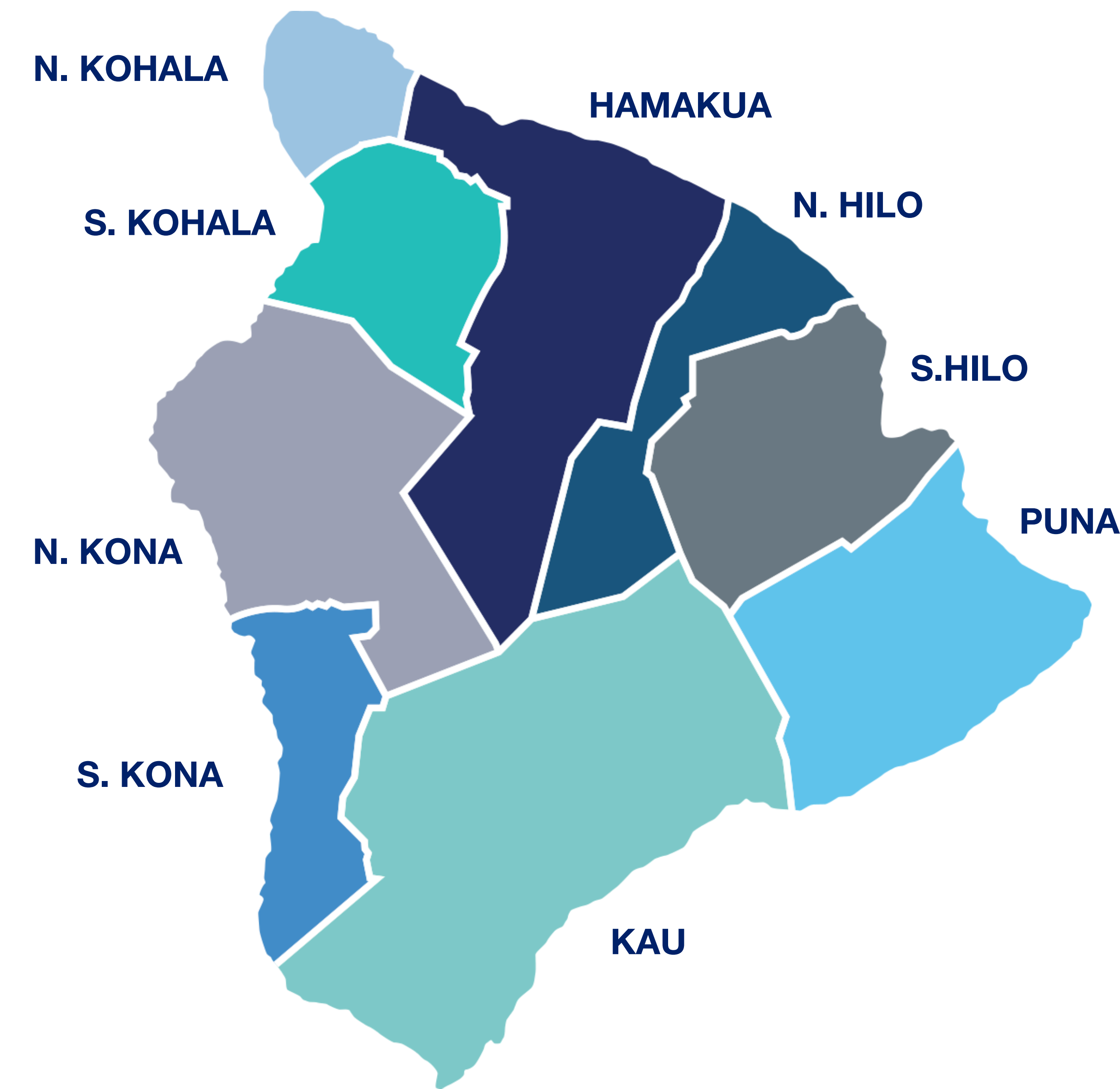




HAWAI'I ISLAND MARKET UPDATE

SEPTEMBER 2026



Hawai'i Island's housing market reflected a typical seasonal slowdown in September as activity eased heading into the final months of the year. Single-family home sales totaled 135 (-22% YoY), while the median price declined 15% to \$499,000. Condo activity also moderated, with 32 sales (-35% YoY) and a \$604,500 median (-6%). Despite fewer transactions, single-family homes moved more quickly than a year ago, with median days on market improving to 37 days from 49, highlighting continued buyer activity within select areas and price points.

Regionally, the single-family market showed considerable variation. Puna remained the island's primary volume driver with 67 sales (+3% YoY)—nearly half of all September transactions—and its median increased 8% to \$399,000. Ka'u also increased to 13 sales (+30%), while activity slowed considerably in higher-priced West Hawai'i: North Kona recorded 20 sales (-43%) and South Kohala 15 (-25%). That shift in the geographic mix of sales likely contributed to the lower island-wide median. Condo activity followed a similar pattern, with North Kona recording 18 sales (-40%) and South Kohala 10 (-33%), together accounting for nearly 90% of all condo transactions. With relatively small transaction counts and meaningful differences between districts, September's island-wide figures continue to reflect Hawai'i Island's highly localized market dynamics.

N. KOHALA			
Total Sales	—	—	—
vs.September 2025	▼ -100%	—	▼ -100%
Median Price	—	—	—
vs.September 2025	—	—	—

HAMAKUA			
Total Sales	2	—	—
vs.September 2025	▼ -67%	—	—
Median Price	\$1.1M	—	—
vs.September 2025	▲ 75%	—	—

S. KOHALA			
Total Sales	15	10	4
vs.September 2025	▼ -25%	▼ -33%	▼ -33%
Median Price	\$1.2M	\$1.1M	\$824K
vs.September 2025	▲ 24%	▼ -22%	▲ 63%

N. HILO			
Total Sales	4	—	1
vs.September 2025	—	—	—
Median Price	\$911K	—	\$450K
vs.September 2025	—	—	—

N. KONA			
Total Sales	20	18	2
vs.September 2025	▼ -43%	▼ -40%	▼ -71%
Median Price	\$1.4M	\$548K	\$315K
vs.September 2025	▲ 4%	▼ -8%	▼ -90%

S. HILO			
Total Sales	8	4	1
vs.September 2025	▼ -65%	—	▼ -88%
Median Price	\$502K	\$248K	\$239K
vs.September 2025	▼ -26%	▼ -13%	▼ -28%

S. KONA			
Total Sales	6	—	2
vs.September 2025	—	—	▼ -71%
Median Price	\$812K	—	\$283K
vs.September 2025	▲ 73%	—	▲ 49%

PUNA			
Total Sales	67	—	50
vs.September 2025	▲ 3%	—	▼ -43%
Median Price	\$399K	—	\$41K
vs.September 2025	▲ 8%	—	▲ 3%

KAU			
Total Sales	13	—	8
vs.September 2025	▲ 30%	—	▼ -58%
Median Price	\$260K	—	\$13K
vs.September 2025	▼ -8%	—	▼ -46%

The information in this report is deemed reliable but not guaranteed.
Data provided by Hawaii Information System (HIS)
as of 10/01/2026 and is subject to change.



SINGLE FAMILY HOME TRANSACTIONS

SEPTEMBER 2026

vs. percent change over last year

	TOTAL SALES				MEDIAN SOLD PRICE				MEDIAN DOM			
	2026	2025	YoY %		2026	2025	YoY %		2026	2025	YoY %	
Captain Cook	5	5	–	–	\$875,000	\$320,000	▲	173%	46	92	▼	-50%
Hakalau	–	1	▼	-100%	–	\$450,000	–	–	–	271	–	–
Hawi	–	5	▼	-100%	–	\$1,390,000	–	–	–	2	–	–
Hilo	8	16	▼	-50%	\$502,000	\$682,500	▼	-26%	8	57	▼	-86%
Honokaa	2	5	▼	-60%	\$1,075,000	\$680,000	▲	58%	19	84	▼	-77%
Honomu	–	2	▼	-100%	–	\$1,777,500	–	–	–	60	–	–
Kailua-Kona	20	35	▼	-43%	\$1,350,000	\$1,295,000	▲	4%	30	37	▼	-19%
Kamuela	6	6	–	–	\$1,310,000	\$1,987,500	▼	-34%	28	97	▼	-71%
Kapaau	–	3	▼	-100%	–	\$1,725,000	–	–	–	52	–	–
Keaau	23	23	–	–	\$505,000	\$450,000	▲	12%	29	57	▼	-49%
Kealakekua	1	1	–	–	\$749,000	\$749,000	–	–	–	10	▼	-100%
Kurtistown	1	5	▼	-80%	\$314,000	\$219,000	▲	43%	115	42	▲	174%
Laupahoehoe	4	–	–	–	\$911,000	–	–	–	15	–	–	–
Mountain View	5	4	▲	25%	\$297,500	\$314,500	▼	-5%	141	34	▲	315%
Naalehu	3	2	▲	50%	\$550,000	\$980,000	▼	-44%	12	81	▼	-85%
Ocean View	10	8	▲	25%	\$220,000	\$207,500	▲	6%	67	60	▲	12%
Pahala	–	–	–	–	–	–	–	–	–	–	–	–
Pahoa	30	23	▲	30%	\$317,000	\$365,000	▼	-13%	34	31	▲	10%
Papaikou	–	1	▼	-100%	–	\$260,000	–	–	–	121	–	–
Pepeekeo	–	3	▼	-100%	–	\$665,000	–	–	–	266	–	–
Volcano	8	10	▼	-20%	\$357,500	\$370,000	▼	-3%	115	35	▲	228%
Waikoloa	9	14	▼	-36%	\$935,000	\$897,500	▲	4%	8	64	▼	-88%
GRAND TOTAL	135	173	▼	-22%	\$499,000	\$584,300	▼	-15%	37	49	▼	-24%



CONDOMINIUM TRANSACTIONS

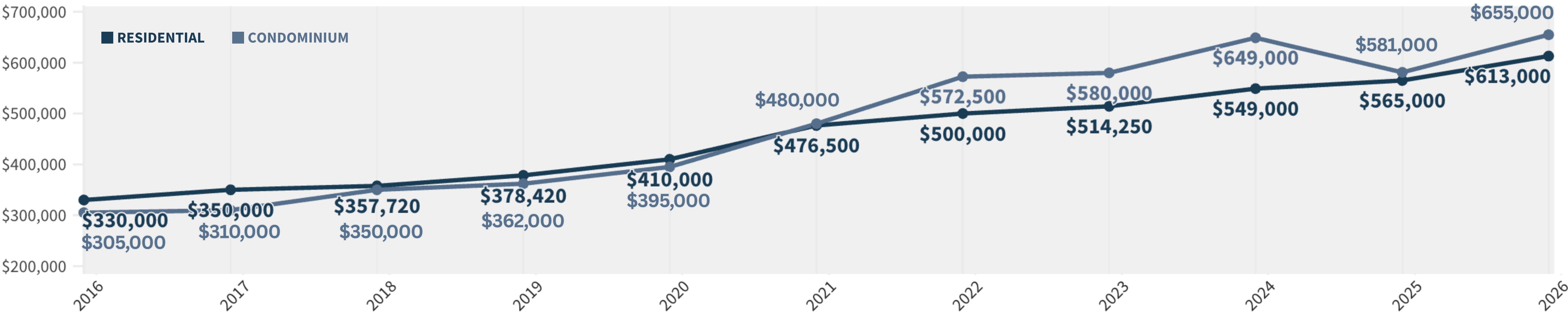
SEPTEMBER 2026

vs. percent change over last year

	TOTAL SALES				MEDIAN SOLD PRICE				MEDIAN DOM			
	2026	2025	YoY %		2026	2025	YoY %		2026	2025	YoY %	
Hilo	4	4	–	–	\$247,500	\$284,950	▼	-13%	15	105	▼	-86%
Kailua-Kona	18	30	▼	-40%	\$547,500	\$597,500	▼	-8%	69	62	▲	11%
Kamuela	7	9	▼	-22%	\$1,108,000	\$1,775,000	▼	-38%	111	45	▲	10%
Pahala	0	0	–	–	–	–	–	–	–	–	–	10%
Waikoloa	3	6	▼	-50%	\$925,000	\$775,000	▲	19%	68	133	▼	10%
GRAND TOTAL	32	49	▼	-35%	\$604,500	\$640,000	▼	-6%	74	71	▲	10%



HAWAII ISLAND 10-YEAR HISTORICAL MEDIAN SALES PRICE



HAWAII ISLAND YTD OVERVIEW (vs. YoY)



	2026	2025	%YoY
TOTAL SALES	1,426	1,526	-5%
MEDIAN SOLD PRICE	\$557K	\$560K	-1%
MEDIAN DOM	41	37	11%
NEW LISTINGS	2,285	2,393	-5%



	2026	2025	%YoY
TOTAL SALES	366	406	-9%
MEDIAN SOLD PRICE	\$630K	\$633K	—
MEDIAN DOM	54	51	5%
NEW LISTINGS	672	704	-5%



	2026	2025	%YoY
TOTAL SALES	971	1,332	-26%
MEDIAN SOLD PRICE	\$60K	\$49K	22%
MEDIAN DOM	45	37	23%
NEW LISTINGS	1,803	2,082	-13%

HAWAII ISLAND DISTRICT YEAR-TO-DATE (vs. YoY)

N. KOHALA									
	2026	2025	%YoY	2026	2025	%YoY	2026	2025	%YoY
Total Sales	16	50	-68%	—	—	—	11	4	178%
Median Sold Price	\$1.08M	\$925K	17%	—	—	—	\$904K	\$1.12M	-19%
Median DOM	44	50	-11%	—	—	—	336	163	107%

S. KONA									
	2026	2025	%YoY	2026	2025	%YoY	2026	2025	%YoY
Total Sales	40	63	-36%	3	—	—	40	66	-39%
Median Sold Price	\$751K	\$775K	-3%	\$399K	—	—	\$315K	\$250K	26%
Median DOM	51	20	155%	84	—	—	89	105	-16%

S. HILO									
	2026	2025	%YoY	2026	2025	%YoY	2026	2025	%YoY
Total Sales	173	185	-5%	44	41	9%	56	46	24%
Median Sold Price	\$600K	\$620K	-3%	\$280K	\$230K	22%	\$316K	\$289K	9%
Median DOM	27	23	17%	46	20	128%	7	22	-67%

S. KOHALA									
	2026	2025	%YoY	2026	2025	%YoY	2026	2025	%YoY
Total Sales	144	146	—	122	123	—	49	34	46%
Median Sold Price	\$1.15M	\$1.06M	9%	\$1.19M	\$1.19M	—	\$440K	\$533K	-17%
Median DOM	47	49	-4%	66	56	18%	92	74	25%

HAMAKUA									
	2026	2025	%YoY	2026	2025	%YoY	2026	2025	%YoY
Total Sales	38	33	17%	—	—	—	7	15	-53%
Median Sold Price	\$690K	\$600K	15%	—	—	—	\$375K	\$465K	-19%
Median DOM	34	18	86%	—	—	—	20	41	-51%

PUNA									
	2026	2025	%YoY	2026	2025	%YoY	2026	2025	%YoY
Total Sales	642	643	1%	—	—	—	612	886	-30%
Median Sold Price	\$402K	\$390K	3%	—	—	—	\$50K	\$45K	11%
Median DOM	41	42	-2%	—	—	—	37	29	28%

N. KONA									
	2026	2025	%YoY	2026	2025	%YoY	2026	2025	%YoY
Total Sales	273	276	—	195	241	-18%	29	42	-30%
Median Sold Price	\$1.22M	\$1.26M	-3%	\$570K	\$620K	-8%	\$700K	\$713K	-2%
Median DOM	36	27	33%	50	53	-6%	100	13	669%

N. HILO									
	2026	2025	%YoY	2026	2025	%YoY	2026	2025	%YoY
Total Sales	15	16	-5%	—	—	—	6	15	-60%
Median Sold Price	\$835K	\$1.16M	-28%	—	—	—	\$520K	\$545K	-5%
Median DOM	64	41	58%	—	—	—	223	86	159%

KAU									
	2026	2025	%YoY	2026	2025	%YoY	2026	2025	%YoY
Total Sales	85	114	-25%	2	1	100%	161	224	-26%
Median Sold Price	\$320K	\$313K	2%	\$248K	\$235K	5%	\$27K	\$20K	35%
Median DOM	71	55	30%	258	145	78%	75	81	-7%