

Ross Report

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Q3 & Q4 2025
Real Estate Report:
Palm Beach, Martin, and
Indian River Counties



Ross Felty
a Real Estate Law Firm
Real Estate Counselors and Advisors

Florida's Northern Gold Coast Luxury Market Finds Its Balance in the Second Half of 2025

During the third and fourth quarters of 2025, the luxury residential markets of Palm Beach, Martin, and Indian River counties transitioned into a more deliberate and balanced phase.

Defined by thoughtful buyer engagement and realistic seller positioning, the \$3 million-plus segment continued to demonstrate resilience — particularly for waterfront and architecturally distinguished properties. While inventory levels normalized and negotiation dynamics evolved, exceptional homes retained their ability to command premium pricing. Collectively, the region's late-2025 performance reflects a mature luxury market where quality, location, and strategic execution increasingly determine outcomes.

County	Luxury Market Activity (\$3M+)	Price Range / Median Luxury Sale	Inventory & Market Tone
Palm Beach	Broadest activity; resilient through late 2025	~\$6M–\$8M median; ultra-luxury \$15M–\$40M+ closed sales	Inventory normalized; buyers gained leverage in mid-tier; trophy estates remained competitive
Martin	Steady, niche high-end engagement	~\$4M–\$6M median; selective premium sales on barrier islands	Balanced pace; discerning buyers and realistic sellers kept conditions steady
Indian River	Consistent, limited volume; standout waterfronts	~\$3M–\$5M median; top closings \$7M+	Inventory growth created choice; presentation and pricing drove performance

Key Themes from Q3-Q4 2025

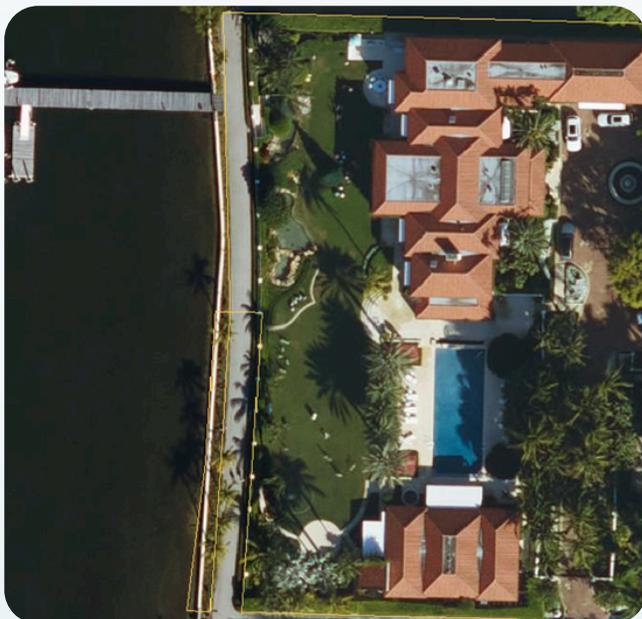
- **Measured Confidence Across Tiers:** Following the spring surge, late 2025 luxury sales moved at a deliberate pace — with buyers evaluating properties more thoroughly and focusing on long-term value rather than urgency.
- **Ultra-Luxury Continues to Lead Perception:** Homes with significant elevation, beachfront frontage, or premier architectural distinction remained insulated from broader market moderation, often commanding premium pricing and shorter negotiation windows.
- **Inventory Normalization Opens Buyer Optionality:** Across all three counties, inventory levels trended upward from mid-year lows — particularly in the \$3M–\$6M range — giving buyers more choices while reinforcing the importance of strategic pricing and staging for sellers.
- **Discretionary Buyers Showing Discernment:** Wealth migration, cash purchasing, and lifestyle relocation continued to influence demand, but buyers increasingly prioritized quality and condition over speculative positioning.
- **Seasonal Transition Set Up for 2026:** As Q4 closed, market signals pointed to sustained interest heading into winter, especially for properties that marry turnkey readiness with premium coastal location.



Palm Beach County

- The county stayed at the forefront of Florida's high-end market, attracting attention from both domestic and international buyers.
- Trophy properties and oceanfront estates repeatedly anchored headline transactions.
- The higher end (\$15M+) remained the most resilient, with several marquee completions and closings contributing to mid-year and year-end totals.

11465 Old Harbour Road
sold for \$97 million
December 15th, making it
one of highest sold
properties in Palm Beach
County for 2025



203 S Lake Trail sold on July
15th for \$86.5M. Built in 1938,
the Midtown estate has been
speculated to be a tear-down



Martin County

- Jupiter Island and Sewall's Point continued to define the county's \$3M+ segment, with intentional activity among well-qualified buyers.
- Balanced conditions prevailed, helping properties with strong lifestyle appeal exchange hands without unnecessary concessions.

Sold in August, 450 S Beach Rd, with nearly six acres of intracoastal-to-ocean land, landed as the top transaction of 2025 with a sales price of \$58M. 12 N Beach Road, sold in October for \$9.1M, shows that you don't need to be waterfront to command a large price tag.



Both transactions, and ultra-luxury transactions in general, show that Jupiter Island continues to command the attention of well-heeled buyers looking to make Martin County home.



Indian River County

- Vero Beach and Indian River Shores offered a quieter but stable luxury market ecosystem.
- The \$3M+ tier persisted as a niche market — driven by waterfront access and architectural distinction — with value-aligned pricing rewarding preparedness and presentation.



331 Palmetto Point closed at approximately \$10.135 million in September 2025, representing the largest residential real estate transaction for 2025.

October 31 saw 420 Indian Harbor Rd sell for \$9.7M. This property, with no direct water access, but a bold interior aesthetic, typifies how much high-end buyers value design along with the coastal lifestyle.



At Ross Felty, a Real Estate Law Firm, we specialize in guiding clients through the complexities of luxury residential and commercial real estate transactions across Florida. The Ross Report offers a quarterly snapshot of the evolving luxury real estate markets of Southeast Florida.

For more information or to discuss your next transaction, contact Mac Ross today: Mac@RossFelty.com



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