

## **United States Real Estate Brokerage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 190 pages | Mordor Intelligence

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### **Report description:**

The United States Real Estate Brokerage Market size is estimated at USD 201.47 billion in 2025, and is expected to reach USD 223.54 billion by 2030, at a CAGR of 2.1% during the forecast period (2025-2030).

### **Key Highlights**

- The US real estate brokerage market is mainly driven by the country's economic conditions and advancements in technology.
- Despite high mortgage rates, soaring home prices, and sluggish sales, experts are optimistic about the housing market's future. However, several persistent challenges are impeding the much-anticipated turnaround for eager buyers.
- One major hurdle is inflation, which is proving slow to abate. This delay is further exacerbated by the Federal Reserve's cautious stance on cutting the federal funds rate. Given that mortgage rates are closely tied to this benchmark rate, the recent surge in the federal funds rate, now at its highest in over two decades, is directly impacting mortgage rates, making homeownership less affordable for borrowers.
- While mortgage rates rise, US home prices show resilience. The S&P CoreLogic Case-Shiller Home Price Index reported a 6.3% annual gain in April, slightly down from March's 6.5% but still setting a new record. While many experts believe a Fed rate cut could reinvigorate the housing sector, the timing and likelihood of such a cut in 2024 remain uncertain.
- Despite their allure, new homes are feeling the pinch of soaring mortgage rates. In May, as mortgage rates touched or exceeded 7%, sales of newly built single-family homes in the United States took a hit. Data from the US Census Bureau and HUD reveals a sharp 11.7% drop from April and a significant 16.5% decline from 2022.
- On a positive note for buyers, the sluggish sales have pushed new home inventories to levels not witnessed since early 2008. Buyers still in the market are gaining more negotiating power. Sellers of existing homes are increasingly offering concessions, such as covering closing costs and contributing towards repairs.
- Furthermore, those eyeing new constructions will be pleased to know that the median price for a new home in May dropped by

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USD 500 to USD 417,400, nearly USD 2,000 below the median price of an existing home.

## United States Real Estate Brokerage Market Trends

### Industrial Sector Leads Real Estate Absorption, Retail Tightens Vacancy Rates

- Although demand growth has increased from 2022, the industrial sector is absorbing unprecedented levels of space, surpassing pre-pandemic figures. In the 12 months leading up to September 2023, net absorption hit a staggering 243 million square feet. This surge has driven the sector's vacancy rate to a mere 5.1%, second only to retail.
- While the pace of rent increases has eased slightly, dropping to 7.5% from a high of 11.4% the year before, they remain unmatched compared to other sectors and have exceeded pre-pandemic levels. Specifically, logistics spaces have seen the most significant uptick, with rents climbing by 8.8% annually. Flex spaces followed with a 4.5% increase, while specialized spaces grew by 6.1%.
- Although retail space absorption dipped by 26% from 2022, the sector's current vacancy rates are at a decade-low, at 4.1%. This marks the retail sector as having the tightest vacancy rate among all commercial real estate segments. Notably, General Retail and Neighborhood Centers led the way, accounting for nearly 87% of net absorption in Q3 2023.
- While retail rents have remained high compared to 2022, their growth has slowed. This deceleration is likely attributed to consumer caution amidst rising costs. Nationally, retail asking rents saw a 3.5% growth, down from the previous year's peak of 4.4% but still higher than pre-pandemic rates. Specifically, neighborhood centers and power centers experienced the most significant rent hikes at 4.4% and 4.2%, respectively. On the other hand, general retail saw a more modest 3% increase but maintained the lowest vacancy rate at 2.5% among all subsectors.

### Residential Segment Experiencing Significant Growth

- In March 2024, sales of new single-family homes in the United States bounced back from a revised lower figure in February 2024. This uptick was largely due to a persistent shortage of existing homes in the market. However, this positive trend might face headwinds due to a resurgence in mortgage rates.
- The Commerce Department's report highlighted that the median house price surged to a seven-month high in March, primarily because fewer builders were offering price cuts, leading to a shift in sales toward higher-priced homes. With both prices and mortgage rates on the rise, the housing market could become increasingly unaffordable, particularly for first-time buyers.
- The Commerce Department's Census Bureau reported a significant 8.8% surge in new home sales, reaching a seasonally adjusted annual rate of 693,000 units in the latest month. This marks the highest level since September. Notably, the sales pace for February was adjusted downward, from 662,000 units to 637,000 units.
- In February 2024, new home sales surged across all US regions. The Northeast led the pack with a remarkable 27.8% increase, while the Midwest saw a 5.3% uptick. In the South, where population density is high, sales rose by 7.7%. Meanwhile, the West experienced a significant 8.6% jump in sales.

## United States Real Estate Brokerage Industry Overview

The US real estate brokerage market boasts a vibrant and competitive landscape, with a spectrum of players, from national franchises to local independents. Leading franchise giants such as Keller Williams Realty, RE/MAX, Coldwell Banker, Berkshire Hathaway HomeServices, and Century 21 Real Estate dominate the market, leveraging their extensive agent networks and

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resources.

Meanwhile, local and regional independent brokerages carve out their niche, excelling in tailored services and specialized knowledge of specific locales or property types. Disruptors like Zillow, Redfin, and Compass are reshaping the industry, pivoting toward online tools, data-driven insights, and virtual services, challenging traditional brokerage norms.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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