

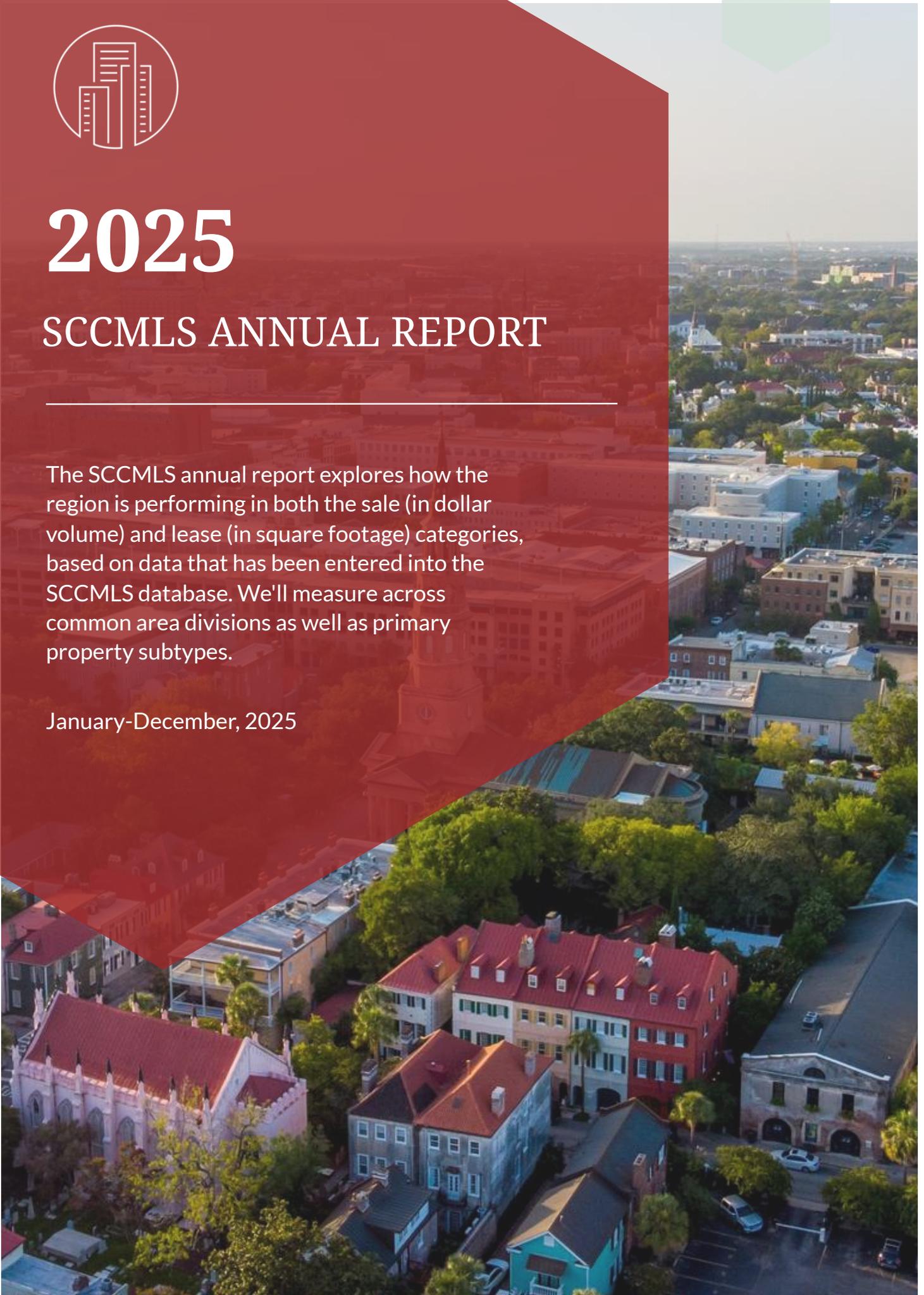


2025

SCCMLS ANNUAL REPORT

The SCCMLS annual report explores how the region is performing in both the sale (in dollar volume) and lease (in square footage) categories, based on data that has been entered into the SCCMLS database. We'll measure across common area divisions as well as primary property subtypes.

January-December, 2025



YEAR-IN-REVIEW

*The Charleston commercial real estate market recorded **over half a billion dollars in total sales volume** and absorbed nearly **4.43 million square feet of lease space** through 2025. These figures underscore the region's sustained position as one of the Southeast's most active mid-size markets. Across nearly two dozen submarkets and nine asset classes, the data reflects a market that is simultaneously deepening in its established corridors and expanding into new ones.*

sales summary

Downtown Charleston remained the single most active submarket, accounting for roughly **28% of all recorded volume** and generating meaningful transaction activity across nearly every asset class. The suburban and outlying submarkets collectively absorbed nearly 55% of total volume, with Greater North Charleston, West Ashley, Goose Creek/Moncks Corner, Mt. Pleasant, and Greater Summerville all posting significant numbers.

Capital is clearly following population and infrastructure, and the corridors radiating outward from the urban core along I-26 and I-526 were among the most active in the region.

By asset class, **office led all categories** — a reflection of several large transactions rather than broad-based demand — followed by retail, industrial, and unimproved land. The unimproved land figure deserves particular attention: \$82 million in ground transactions is a forward-looking signal, pointing to solid development in the Summerville, Goose Creek, Wando/Cainhoy, and Mt. Pleasant corridors. Industrial continued its strong run, concentrated in North Charleston but showing signs of geographic spread as developers and investors look to corridors with lower land costs and good logistics access.

Several submarkets recorded no commercial sales activity at all, a reminder that meaningful market data in this region tends to concentrate in a relatively small number of high-activity areas.

lease summary

The Charleston region's commercial **leasing market absorbed nearly 4.43 million square feet** in 2025. Industrial inventory dominated with roughly 3.08 million square feet - just under 70% of all space leased. Office follows at 818,731 square feet (18.5%), while retail rounds out the core asset classes at 507,940 square feet (11.5%). The remaining volume is split between shopping center and special purpose uses, together contributing less than 1% of total activity.

At 3.08 million square feet, industrial leasing is the defining force of Charleston's 2025 commercial market. The concentration is striking - Greater North Charleston alone absorbed 1.61 million square feet, representing nearly 40% of all industrial space leased. The Dorchester Road Corridor follows at 693,213 square feet - a reflection of the continued build-out of logistics and distribution capacity along the I-26 spine. Orangeburg County leased 352,264 square feet, signaling that tenant demand is reaching beyond the traditional Charleston metro into surrounding counties where land is cost-competitive.

The **818,731 square feet of office space leased** across the region tells a more nuanced story than the national headlines about office distress might suggest. Charleston's office leasing is not collapsed—it's redistributed. Greater North Charleston leads at 222,768 square feet (27.2%), narrowly edging out Downtown Charleston at 193,030 square feet (23.6%). Together, these two submarkets absorbed just over half of all office activity. But the story doesn't end there—West Ashley (107,560 SF), Mount Pleasant (103,882 SF), and Daniel Island (72,078 SF) each registered meaningful volumes, suggesting that office tenants are distributing across quality suburban areas.

Retail totaled 507,940 square feet—the most evenly distributed asset class across submarkets. The top six retail submarkets each captured between 10% and 20% of total volume.

Agriculture, Hospitality, Unimproved Land and Multi-Family recorded no commercial lease activity.

*Overall, the 2025 sales and lease data paints a picture of a **healthy, diversified commercial market** with clear centers of gravity, active suburban expansion, and a land acquisition pattern that suggests the pipeline for future inventory remains robust.*

'25 Snap Shot

sale

For 2025, the top performing asset class in sales volume were **Office with \$193,592,064** and **Retail with \$113,282,108**. Industrial and Unimproved Land followed closely behind.

All sales totaled **\$588,168,342**.

lease

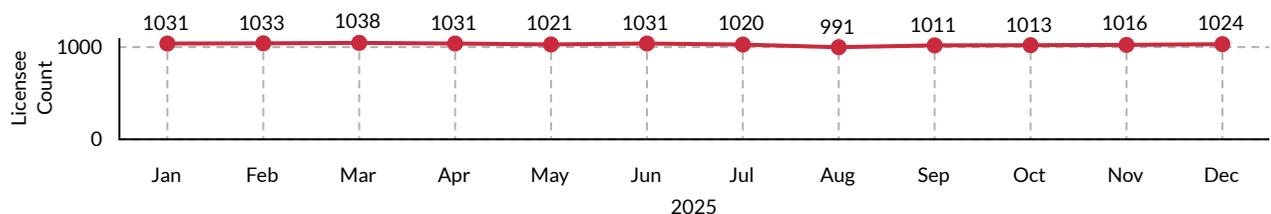
For 2025, the top performing property subtypes in total square footage was **Industrial at 2,053,869** square feet leased, and **Office with 815,526** square feet leased.

Total leased square footage was **3,401,971**



membership

Last year, agent and broker membership averaged 1,022 users per month with an additional 76 administrative users.



SALES DETAIL *by general areas*

For 2025, sales volume across all areas in the SCCMLS database totaled **\$588,168,342**. Data is shown below by general areas with specific MLS areas combined (i.e. Mount Pleasant is area 41 and 42). Areas that did not report sales are not listed, but may be found in the raw data pages.

Daniel Island	\$4,207,500
Dorchester Rd Corridor	\$17,275,775
Downtown Charleston	\$165,878,936
Goose Creek/Moncks Corner	\$55,374,999
Greater North Charleston	\$102,905,684
Greater Summerville Area	\$45,827,543
Hanahan	\$2,225,000
Hollywood/Ravenel/Meggett Area	\$10,479,000
James Island	\$5,300,000
Johns Island	\$11,094,000
Mount Pleasant	\$54,035,805
Rural Berkeley County	\$1,007,500
St. George/Rural Dorchester County	\$1,784,000
Wando/Cainhoy	\$12,415,000
West Ashley Area	\$59,435,400
Orangeburg County	\$3,447,200
Colleton County	\$1,475,000
Beaufort County	\$290,000
Out of Area	\$588,168,342

Top 5 Areas

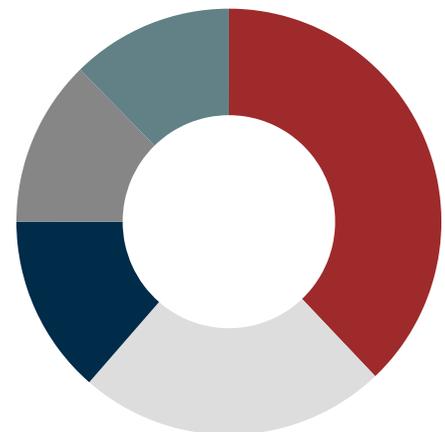
Downtown Charleston \$165,878,936

Greater North Charleston \$102,905,684

West Ashley Area \$59,435,400

Goose Crk/Moncks Corner \$55,374,999

Mount Pleasant \$54,035,805



- Downtown Charleston (37.9%)
- Greater North Charleston (23.51%)
- West Ashley Area (13.58%)
- Good Creek/Moncks Corner (12.65%)
- Mount Pleasant (12.35%)

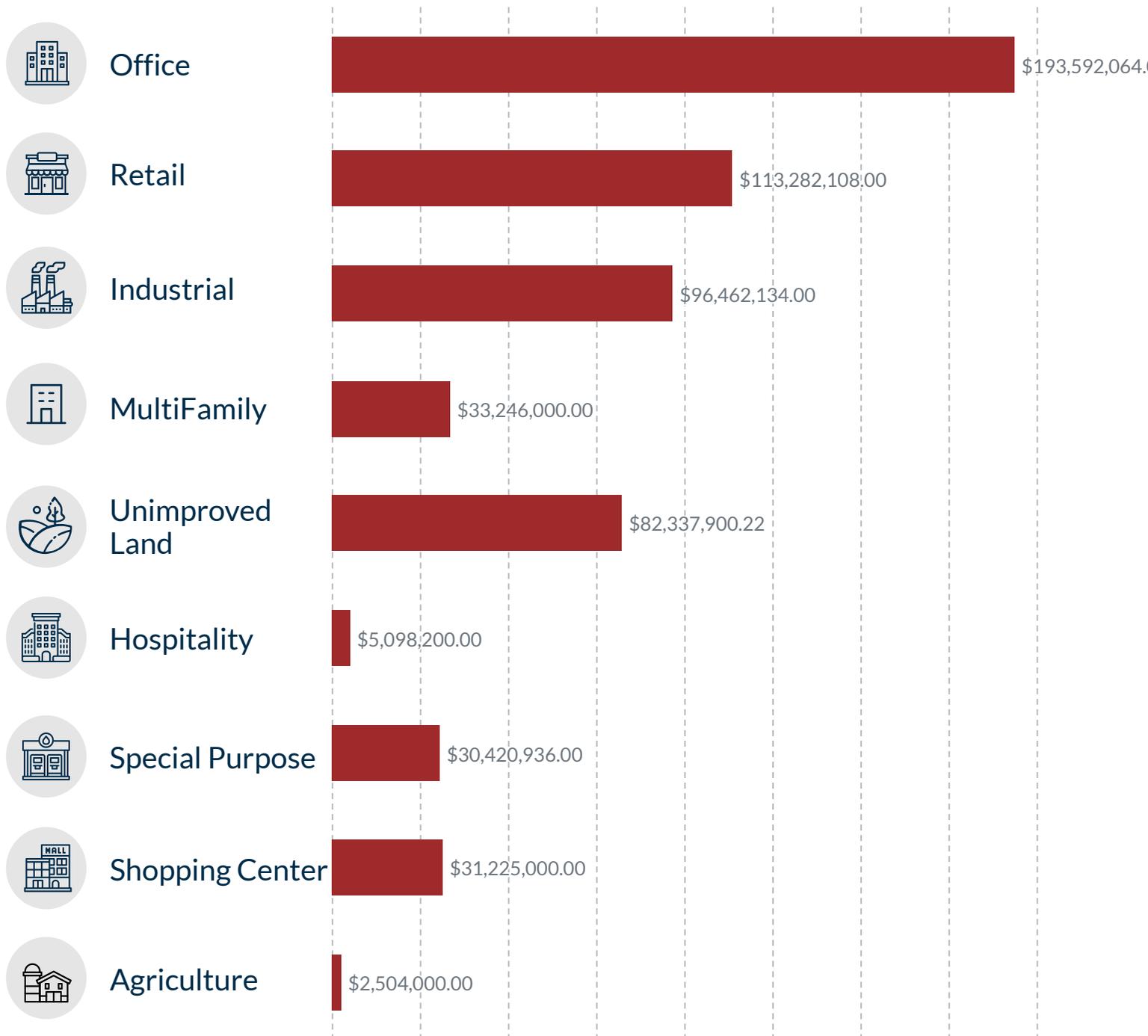
Notes:

In 2025, 50 Flex Space listings were entered into the Current Use Field. Of those, 13 Flex Space listings closed during the year.

In 2025, 264 listings were entered that were located in Opportunity Zones. Of those, 27 closed during the year.

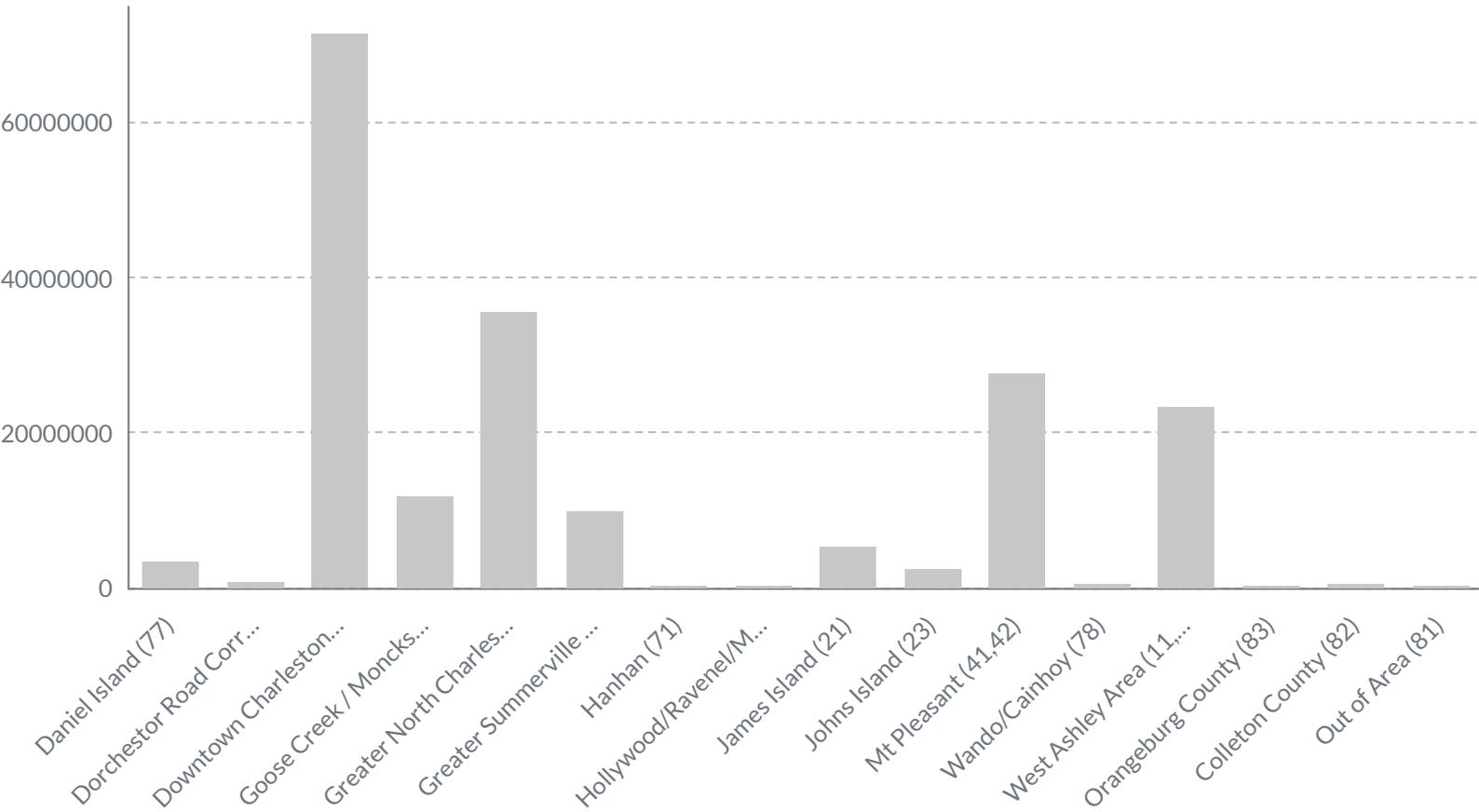
SALES DETAIL *by primary property subtype*

The data below is broken down by asset class, also known as property subtype in Flexmls, with focus on the *primary* property subtype entry. While you can search on up to 3 property subtype entries in the SCCMLS database, these totals reflect *primary* subtype selections.

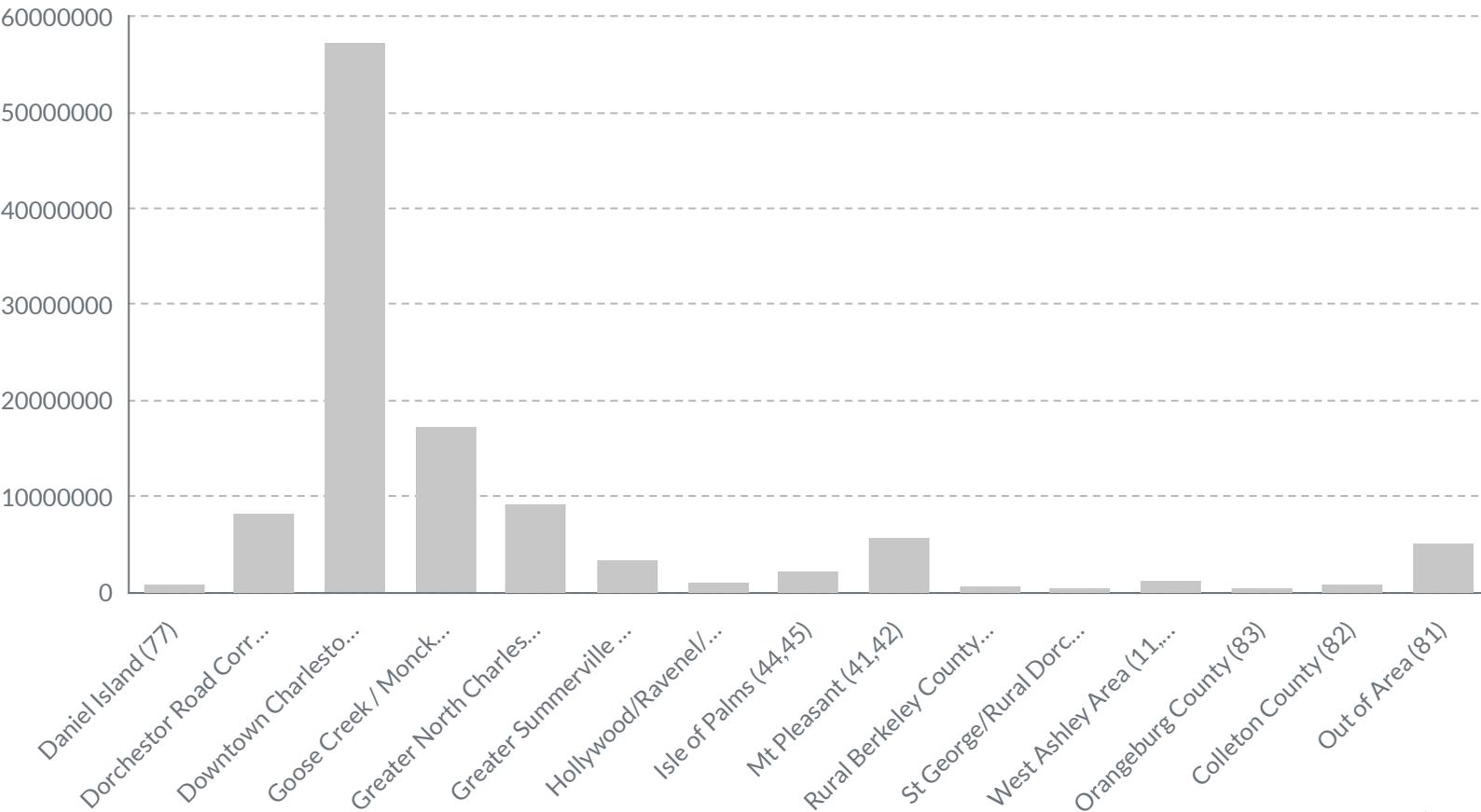


SALES DETAIL *top grossing: office and retail*

Office: \$193,592,064



Retail: \$113,282,108



RAW 2025 SALES DATA

by general areas - combined for easy reading

	Agriculture	Industrial	Office	Shopping Center	Unimproved Land	Hospitality	Multi Family	Retail	Special Purpose	TOTAL
Daniel Island (77)	\$0	\$0	\$3,437,500	\$0	\$0	\$0	\$0	\$770,000	\$0	\$4,207,500
Dorchester Road Corridor (61)	\$0	\$0	\$633,000	\$0	\$1,655,000	\$0	\$6,845,000	\$8,142,775	\$0	\$17,275,775
Downtown Charleston (51,52)	\$0	\$0	\$71,450,000	\$0	\$10,000,000	\$2,700,000	\$13,245,000	\$57,315,000	\$11,168,936	\$165,878,936
Edisto Area (26,27,28)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Folly Beach (22)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Goose Creek / Moncks Corner (72,73,74,76)	\$0	\$6,235,000	\$11,890,000	\$2,750,000	\$14,234,999	\$1,425,000	\$1,700,000	\$17,140,000	\$0	\$55,374,999
Greater North Charleston (31,32)	\$0	\$42,295,134	\$35,603,000	\$1,400,000	\$10,302,000	\$0	\$2,996,000	\$9,229,550	\$1,080,000	\$102,905,684
Greater Summerville Area (62,63)	\$0	\$11,900,000	\$9,831,924	\$0	\$15,198,336	\$0	\$4,990,000	\$3,407,283	\$500,000	\$45,827,543
Hanhan (71)	\$0	\$0	\$350,000	\$0	\$175,000	\$0	\$1,700,000	\$0	\$0	\$2,225,000
Hollywood/Ravenel/Meggett Area (13)	\$0	\$8,175,000	\$300,000	\$0	\$1,049,000	\$0	\$0	\$955,000	\$0	\$10,479,000
Isle of Palms (44,45)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,200,000	\$0	\$2,200,000
James Island (21)	\$0	\$0	\$5,300,000	\$0	\$0	\$0	\$0	\$0	\$0	\$5,300,000
Johns Island (23)	\$1,600,000	\$939,000	\$2,300,000	\$0	\$1,330,000	\$0	\$0	\$0	\$4,925,000	\$11,094,000
Kiawah (25)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Mt Pleasant (41,42)	\$0	\$1,000,000	\$27,756,240	\$11,000,000	\$7,009,565	\$0	\$1,170,000	\$5,600,000	\$500,000	\$54,035,805
Rural Berkeley County (75)	\$0	\$0	\$0	\$0	\$300,000	\$0	\$0	\$547,500	\$160,000	\$1,007,500
Seabrook (30)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
St George/Rural Dorchester County (64)	\$84,000	\$400,000	\$0	\$0	\$200,000	\$0	\$0	\$440,000	\$0	\$1,124,000
Sullivans Island (43)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Wando/Cainhoy (78)	\$0	\$3,475,000	\$600,000	\$0	\$8,340,000	\$0	\$0	\$0	\$0	\$12,415,000
West Ashley Area (11,12)	\$730,000	\$12,930,000	\$23,240,400	\$16,075,000	\$4,635,000	\$0	\$600,000	\$1,225,000	\$0	\$59,435,400
Orangeburg County (83)	\$0	\$0	\$215,000	\$0	\$2,229,000	\$553,200	\$0	\$450,000	\$0	\$3,447,200
Colleton County (82)	\$0	\$0	\$465,000	\$0	\$135,000	\$0	\$0	\$875,000	\$0	\$1,475,000
Beaufort County (100)	\$90,000	\$0	\$0	\$0	\$200,000	\$0	\$0	\$0	\$0	\$290,000
Out of Area (81)	\$0	\$9,113,000	\$220,000	\$0	\$5,345,000	\$420,000	\$0	\$4,985,000	\$12,087,000	\$32,170,000
TOTAL	\$2,504,000	\$96,462,134	\$193,592,064	\$31,225,000	\$82,337,900	\$5,098,200	\$33,246,000	\$113,282,108	\$30,420,936	\$588,168,342

LEASE DETAIL *by general areas*

For 2025, total leased square footage across all areas in the SCCMLS database totaled **4,432,747**. Data is shown below by general areas with specific MLS areas combined (i.e. Mount Pleasant is area 41 and 42). Areas that did not report leases are not listed, but may be found in the raw data pages.

Daniel Island	73,864
Dorchester Rd Corridor	693,213
Downtown Charleston	293,682
Goose Creek/Moncks Corner	281,460
Greater North Charleston	1,614,663
Greater Summerville Area	315,438
Hanahan	29,528
Hollywood/Ravenel/Meggett Area	8,350
Isle of Palms	1,338
James Island	31,444
Johns Island	23,547
Mount Pleasant	232,411
Rural Berkeley County	114,804
St. George/Rural Dorchester Cty	2,400
Wando/Cainhoy	67,110
West Ashley Area	192,194
Colleton County	105,966
Orangeburg County	352,264
Colleton County	48,850
Out of Area	56,187

Top Areas Absorbed

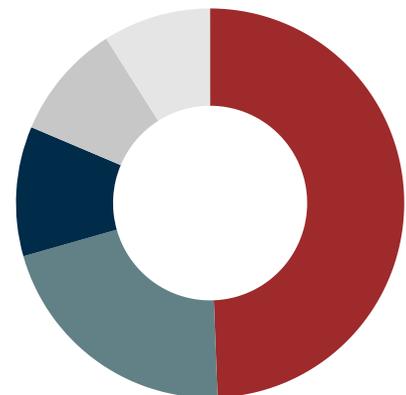
Greater North Charleston 1,614,663 sqft

Dorchester Road Corridor 693,213 sqft

Orangeburg County 352,264 sqft

Greater Summerville Area 315,438 sqft

Downtown Charleston 293,682 sqft



- Greater North Charleston (49.39%)
- Dorchester Road Corridor (21.2%)
- Orangeburg County (10.78%)
- Greater Summerville Area (9.65%)
- Downtown Charleston (8.98%)

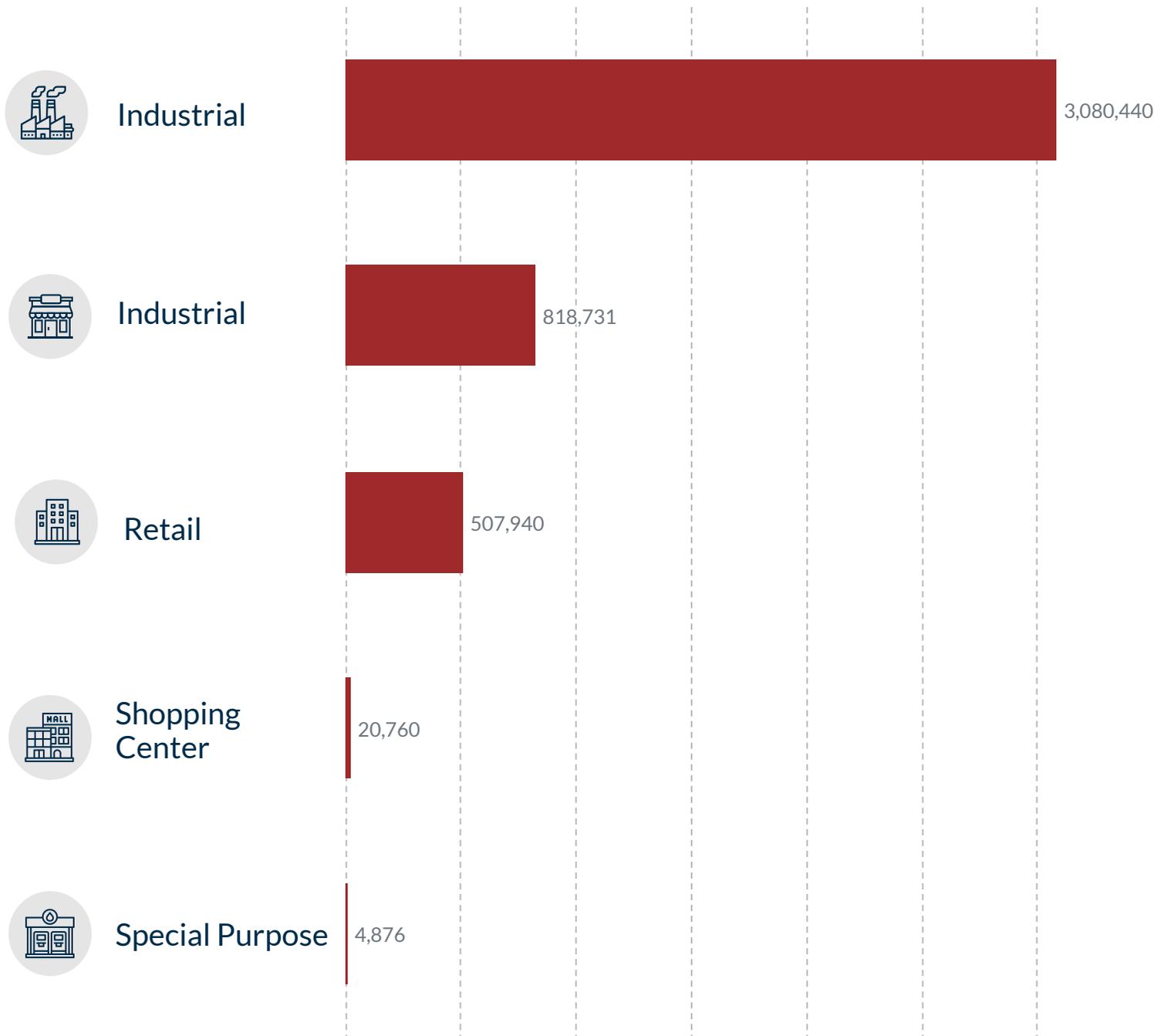
What about acreage?

Square footage volume metrics in the area provides much more diverse numbers and is the focus.

In our market, Agriculture and Unimproved Land are infrequently recorded for lease.

LEASE DETAIL *by primary property subtype in sqft*

The data below is broken down by asset class, also known as property subtype in Flexmls, with focus on the *primary* property subtype entry. While you can search on up to 3 property subtype entries in the SCCMLS database, these totals reflect *primary* subtype selections.

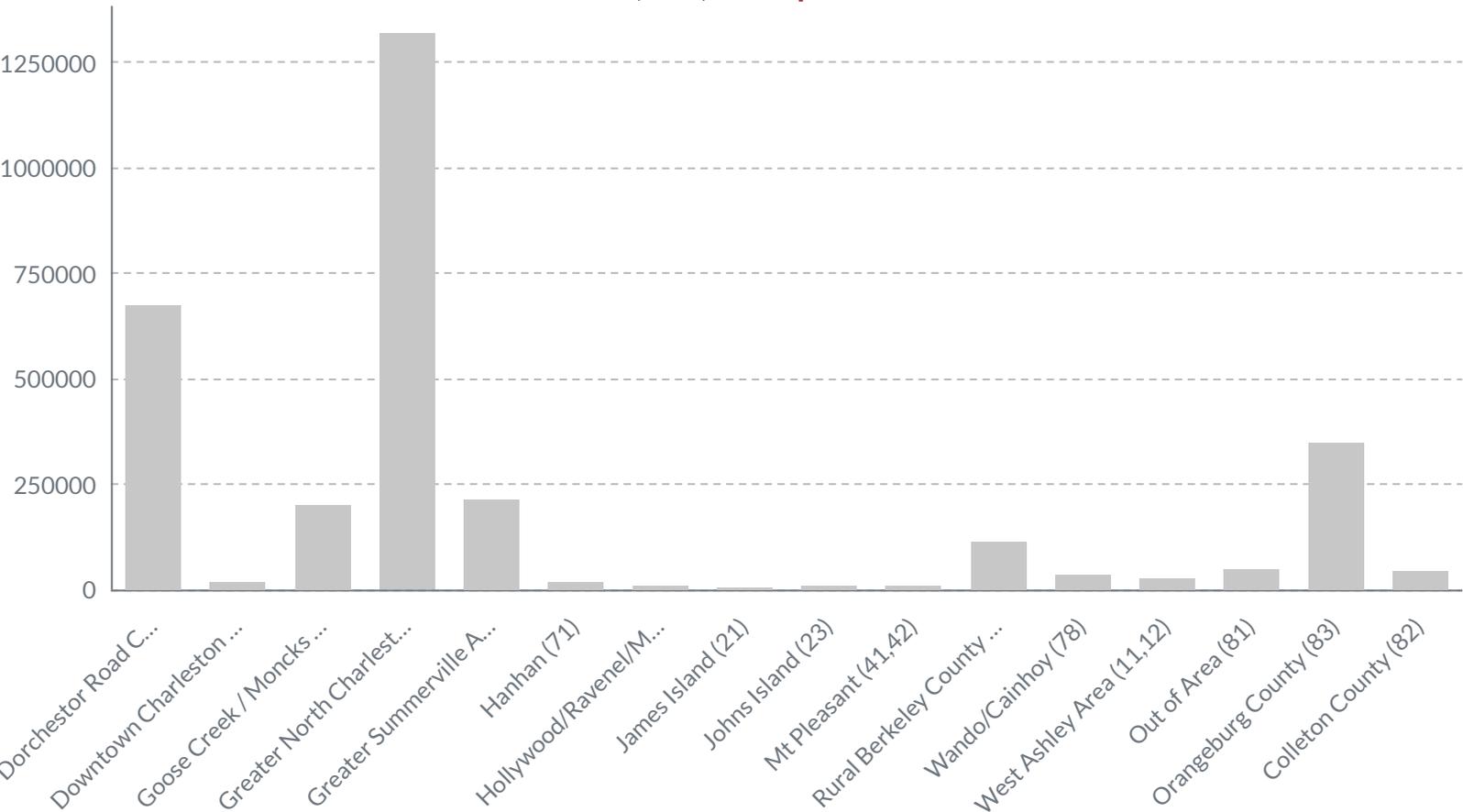


notes:

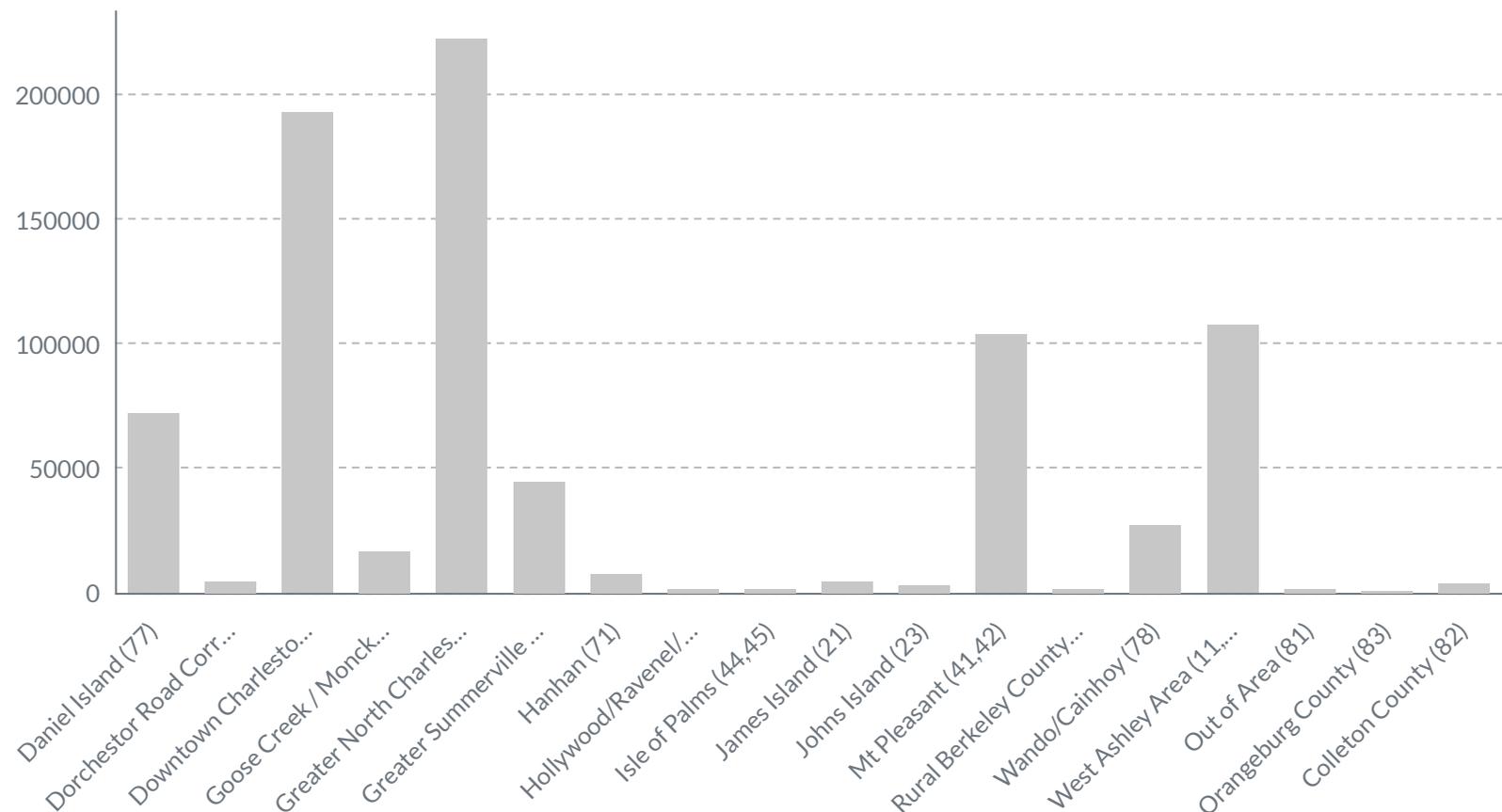
- 1 In the Agricultural, Unimproved Land, Hospitality and Multi-Family subtypes, no 2025 leases were recorded.
- 2 Of 825 leases closed in 2025, the vast majority at 466 were NNN, trailing with 181 Full Service.
- 3 118 Flex Space listings were leased in 2025.

LEASE DETAIL *top grossing: industrial and office*

Industrial: 3,080,440 square feet total



Office: 818,731 square feet total



RAW 2025 LEASE DATA by general areas - combined for easy reading

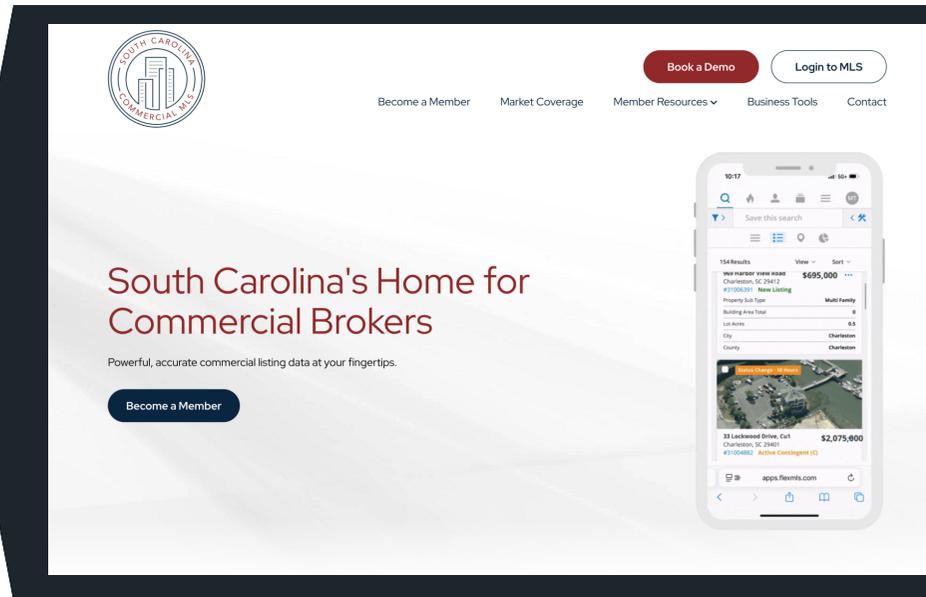
	Agricultural	Industrial	Office	Shopping Center	Unimproved	Hospitality	Multi Family	Retail	Special Purpose	TOTAL
Daniel Island (77)	0	0	72,078	0	0	0	0	1,786	0	73,864
Dorchester Road Corridor (61)	0	676,367	4,260	0	0	0	0	12,586	0	693,213
Downtown Charleston (51,52)	0	16,150	193,030	1,818	0	0	0	82,684	0	293,682
Edisto Area (26,27,28)	0	0	0	0	0	0	0	0	0	0
Folly Beach (22)	0	0	0	0	0	0	0	0	0	0
Goose Creek / Moncks Corner (72,73,74,76)	0	199,300	16,722	1,077	0	0	0	64,362	0	281,460
(31,32)	0	1,318,935	222,768	0	0	0	0	70,084	2,876	1,614,663
(62,63)	0	212,011	44,619	2,400	0	0	0	54,408	2,000	315,438
Hanhan (71)	0	16,800	7,928	0	0	0	0	4,800	0	29,528
Area (13)	0	7,100	1,250	0	0	0	0	0	0	8,350
Isle of Palms (44,45)	0	0	1,338	0	0	0	0	0	0	1,338
James Island (21)	0	2,770	4,850	0	0	0	0	23,824	0	31,444
Johns Island (23)	0	6,751	3,200	0	0	0	0	13,596	0	23,547
Kiawah (25)	0	0	0	0	0	0	0	0	0	0
Mt Pleasant (41,42)	0	10,884	103,882	14,265	0	0	0	103,380	0	232,411
Awendaw/MMcClellanville (47)	0	0	0	0	0	0	0	0	0	0
Rural Berkeley County (75)	0	112,107	1,497	0	0	0	0	1,200	0	114,804
Seabrook (30)	0	0	0	0	0	0	0	0	0	0
County (64)	0	0	0	0	0	0	0	2,400	0	2,400
Sullivans Island (43)	0	0	0	0	0	0	0	0	0	0
Wando/Cainhoy (78)	0	35,800	27,262	0	0	0	0	4,048	0	67,110
West Ashley Area (11,12)	0	24,560	107,560	0	0	0	0	60,074	0	192,194
Out of Area (81)	0	47,687	1,700	1,200	0	0	0	5,600	0	56,187
Orangeburg County (83)	0	349,468	888	0	0	0	0	1,908	0	352,264
Colleton County (82)	0	43,750	3,900	0	0	0	0	1,200	0	48,850
TOTAL	0	3,080,440	818,731	20,760	0	0	0	507,940	4,876	4,432,747

less acreage

information deemed reliable but not guaranteed

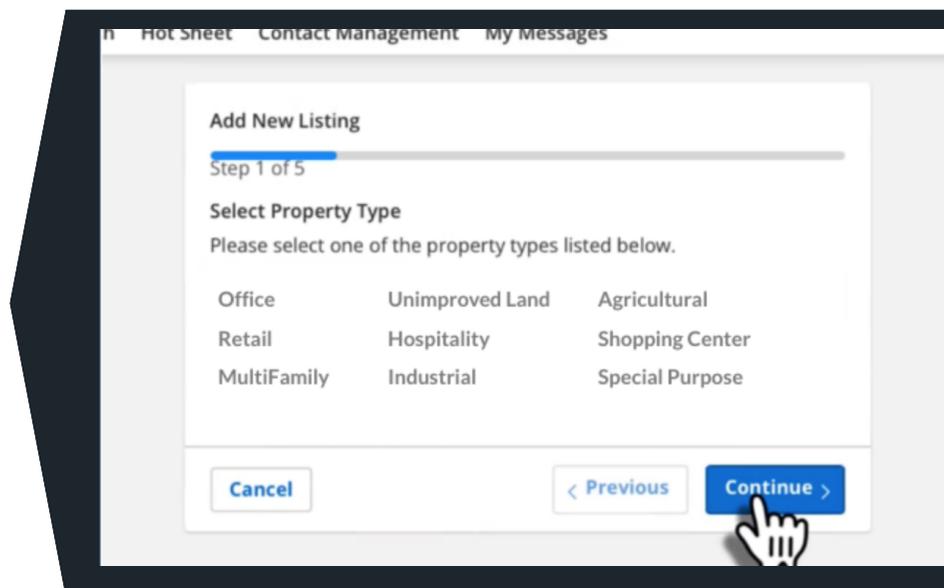
2025 Updates *icymi: top updates from last year*

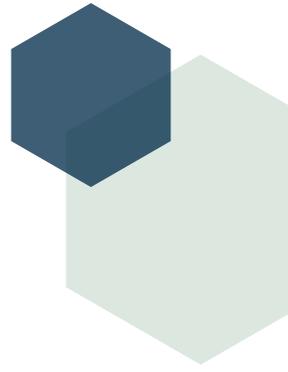
Last year, we launched a completely redesigned website with growth in mind. Our aim is to promote SCCMLS throughout the state in 2026-2027.



In May, we partnered with Crexi - one of the largest commercial sites in the digital marketplace - to automatically syndicate SCCMLS listings for display at no additional cost to SCCMLS members.

FBS Data launched their Auto Assistant for Flexmls listing entry. It autofills available data from prior listings and tax data to save time. It utilizes a simple walkthrough style interface.





SOUTH CAROLINA COMMERCIAL MLS

If there is a particular metric
you would love to see
included, drop us a note at
Support@SCCMLS.com

