

November 2025 Housing Market Report

Prepared by Bright Research

Data as of December 4, 2025

Key Market Statistics	Nov 2025	Nov 2024	Change	YTD 2025	YTD 2024	Change
Closed Sales	3,355	3,583	-6.4%	45,476	45,860	-0.8%
Median Sold Price	\$630,000	\$600,000	+5.0%	\$629,000	\$606,300	+3.7%
Median Days on Market	22 days	13 days	+9 days	13 days	8 days	+5 days
New Pending Sales	3,529	3,705	-4.8%	46,613	47,852	-2.6%
New Listings	2,927	3,097	-5.5%	67,115	62,847	+6.8%
Active Listings	9,142	6,838	+33.7%	9,142	6,838	+33.7%
Months of Supply	2.22	1.67	+0.55 mos.	2.22	1.67	+0.55 mos.
Showings	76,698	76,052	+0.8%	1,001,077	1,030,590	-2.9%

Housing Market Trends

The Washington D.C. area housing market was sluggish in November. Even as rates fell to a 13-month low, economic uncertainty continues to hold back buyers and sellers in the D.C. region. Closed sales were down 6.4% year-over-year. Loudoun County was the bright spot in the region, with closed sales up by 8.7%.

Sellers in the region are also cautious. The number of new listings coming onto the market in November was 5.5% lower than in November 2024.

Despite slower listing activity, inventory continues to climb as homes stay on the market longer. At the end of November, there was a total of 9,142 active listings across the Washington D.C. region, a 33.7% increase over a year ago. The median days on market was 22, which was nine days slower than last year.

There is significant local variation across the D.C. region, with stronger market conditions in the Northern Virginia suburbs and weaker activity in the District of Columbia and Maryland suburbs.

Market Outlook

Through November, sales in the Washington D.C. region area are tracking 0.8% below last year. With new pending sales down by 4.8% in November, expect that 2025 will end the year with fewer sales than in 2024. Federal government spending cuts and layoffs, along with the prolonged shutdown, have created uncertainty that will continue into 2026.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2025

2024

2020-2023 Range

3,355

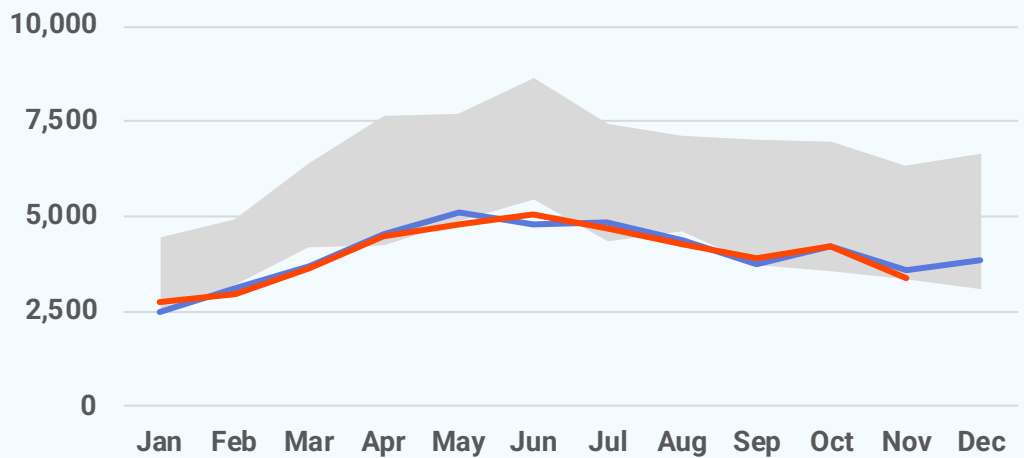
November 2025

-6.4%

Nov '25 vs. Nov '24
(Nov '24: 3,583)

-20.1%

Nov '25 vs. Oct '25
(Oct '25: 4,201)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$630,000

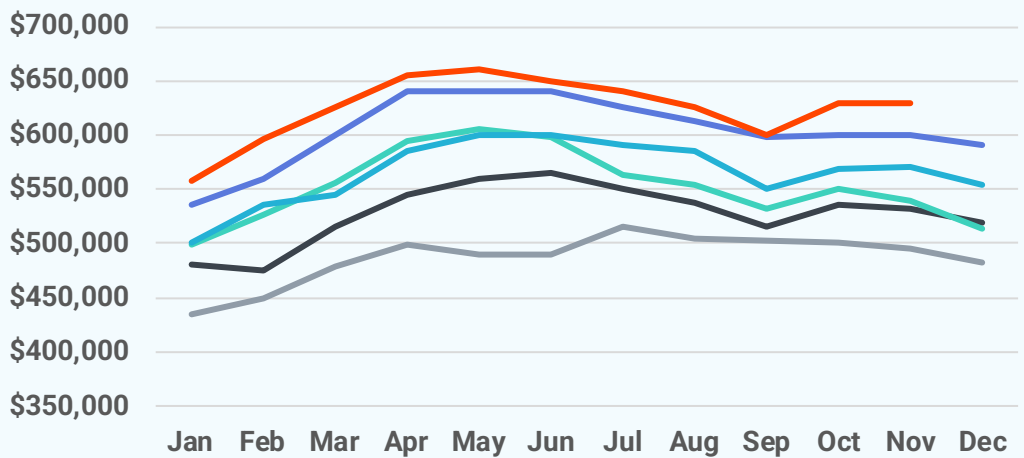
November 2025

+5.0%

Nov '25 vs. Nov '24
(Nov '24: \$600,000)

+0.0%

Nov '25 vs. Oct '25
(Oct '25: \$630,000)



Median Days on Market

22 days

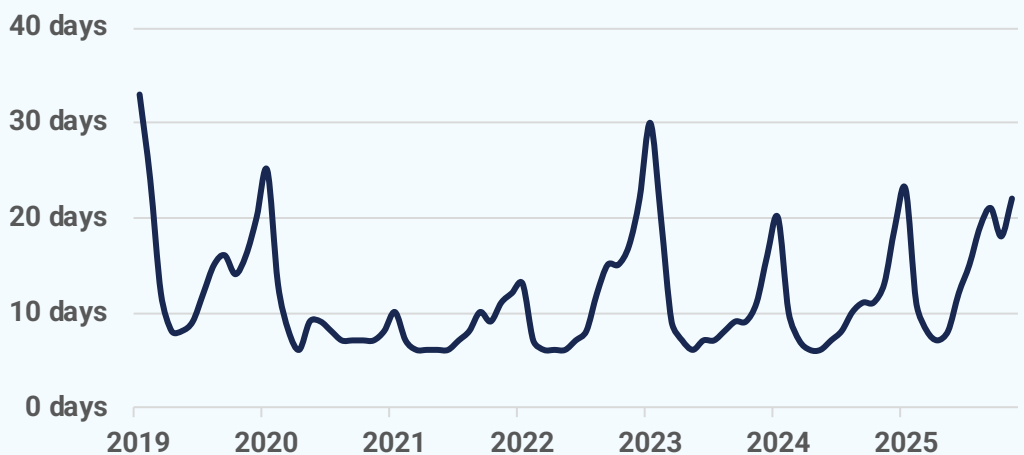
November 2025

+9 days

Nov '25 vs. Nov '24
(Nov '24: 13 days)

+4 days

Nov '25 vs. Oct '25
(Oct '25: 18 days)



New Pending Sales

2025

2024

2020-2023 Range

3,529

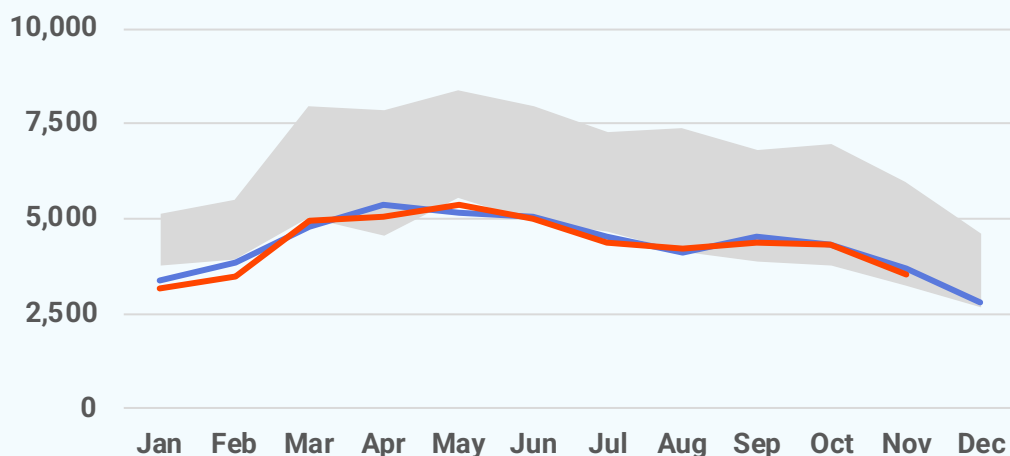
November 2025

-4.8%

Nov '25 vs. Nov '24
(Nov '24: 3,705)

-18.6%

Nov '25 vs. Oct '25
(Oct '25: 4,335)



New Listings

2025

2024

2020-2023 Range

2,927

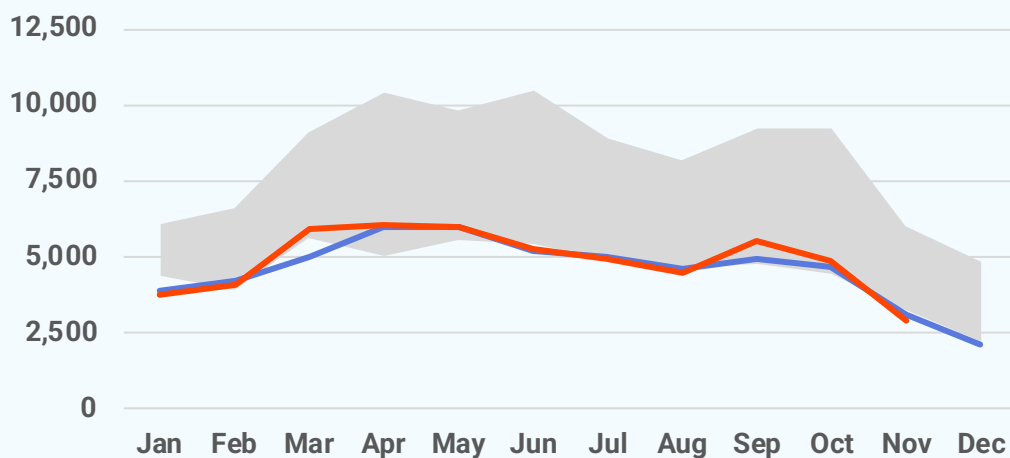
November 2025

-5.5%

Nov '25 vs. Nov '24
(Nov '24: 3,097)

-39.8%

Nov '25 vs. Oct '25
(Oct '25: 4,861)



Active Listings

9,142

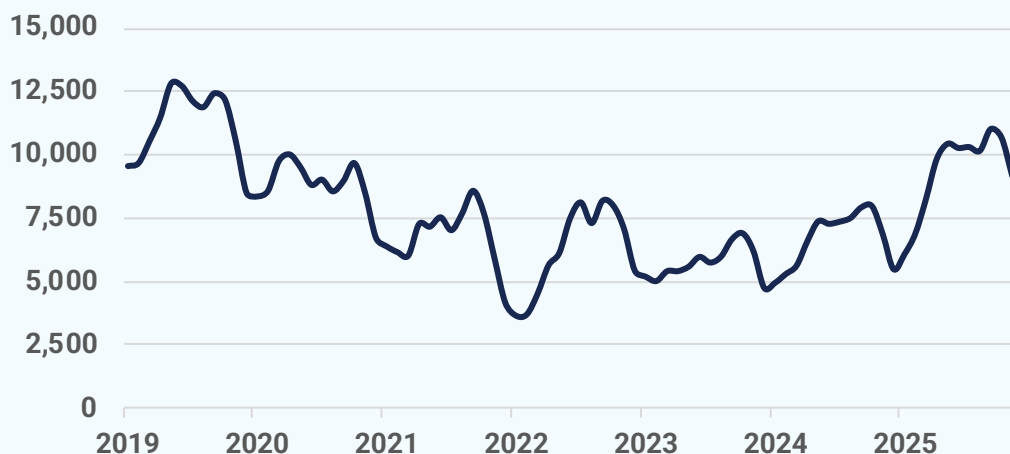
November 2025

+33.7%

Nov '25 vs. Nov '24
(Nov '24: 6,838)

-14.2%

Nov '25 vs. Oct '25
(Oct '25: 10,661)



Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Nov '25	vs. Nov '24	Nov '25	vs. Nov '24	Nov '25	vs. Nov '24
Washington, D.C. Metro	3,355	-6.4%	\$630,000	+5.0%	22 days	+9 days
Alexandria City, VA	121	-11.0%	\$660,000	+5.6%	18 days	+4 days
Arlington County, VA	145	-5.8%	\$790,000	+13.7%	23 days	+4 days
Fairfax City, VA	27	+107.7%	\$794,888	+17.8%	20 days	+11 days
Fairfax County, VA	787	-8.2%	\$739,999	+5.0%	17 days	+7 days
Falls Church City, VA	11	+37.5%	\$865,000	-21.5%	16 days	+8 days
Frederick County, MD	242	-11.7%	\$445,995	-10.8%	25 days	+7 days
Loudoun County, VA	387	+8.7%	\$735,000	-2.0%	19 days	+10 days
Montgomery County, MD	704	-1.5%	\$635,000	+5.8%	21 days	+11 days
Prince George's County, MD	510	-18.1%	\$430,000	-2.3%	29 days	+17 days
Washington, DC	421	-5.8%	\$715,000	+2.3%	33 days	+5 days

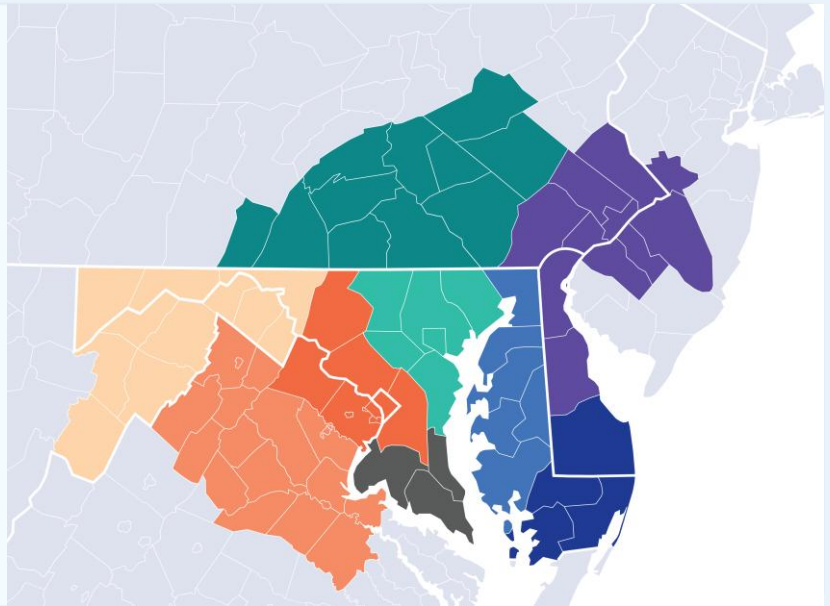
Local Markets	New Pending Sales		New Listings		Showings	
	Nov '25	vs. Nov '24	Nov '25	vs. Nov '24	Nov '25	vs. Nov '24
Washington, D.C. Metro	3,529	-4.8%	2,927	-5.5%	76,698	+0.8%
Alexandria City, VA	128	-6.6%	95	-8.7%	2,638	+6.6%
Arlington County, VA	160	+25.0%	102	-15.7%	2,884	+3.7%
Fairfax City, VA	25	+13.6%	17	+6.3%	544	+85.7%
Fairfax County, VA	772	-2.2%	525	-7.6%	17,599	-2.1%
Falls Church City, VA	6	-14.3%	7	-12.5%	124	-8.1%
Frederick County, MD	281	-7.6%	275	+25.0%	4,497	+8.1%
Loudoun County, VA	372	+11.4%	262	-4.0%	6,023	+3.0%
Montgomery County, MD	692	-4.8%	529	+1.5%	16,711	+5.3%
Prince George's County, MD	638	-10.0%	623	-2.5%	15,680	-1.1%
Washington, DC	455	-17.0%	492	-21.5%	9,998	-6.2%

Local Markets

	Active Listings		Months of Supply	
	Nov '25	vs. Nov '24	Nov '25	vs. Nov '24
Washington, D.C. Metro	9,142	+33.7%	2.22	+0.55 months
Alexandria City, VA	293	+49.5%	1.80	+0.58 months
Arlington County, VA	361	+36.2%	1.91	+0.45 months
Fairfax City, VA	41	+28.1%	1.46	+0.13 months
Fairfax County, VA	1,304	+47.2%	1.33	+0.41 months
Falls Church City, VA	43	+53.6%	3.31	+0.76 months
Frederick County, MD	614	+58.2%	2.08	+0.78 months
Loudoun County, VA	507	+18.5%	1.14	+0.1 months
Montgomery County, MD	1,594	+58.0%	1.98	+0.7 months
Prince George's County, MD	1,800	+51.4%	2.68	+1.05 months
Washington, DC	2,585	+7.0%	4.84	+0.19 months

Local Market Map

- MD/WV Panhandle
- North Central Virginia
- Washington D.C., Metro
- Central Pennsylvania
- Baltimore Metro
- Southern Maryland
- Maryland Eastern Shore
- Philadelphia Metro
- Del/Mar Coastal



About Bright MLS

Bright MLS was founded in 2016 as a collaboration between 43 visionary associations and two of the nation's most prominent MLSs to transform what an MLS is and what it does, so real estate pros and the people they serve can thrive today and into our data-driven future through an open, clear and competitive housing market for all. Bright is proud to be the source of truth for comprehensive real estate data in the Mid-Atlantic, with market intelligence currently covering six states (Delaware, Maryland, New Jersey, Pennsylvania, Virginia, West Virginia) and the District of Columbia.

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