

September 2025 Housing Market Report

Prepared by Bright Research

Data as of October 6, 2025

Key Market Statistics	Sep 2025	Sep 2024	Change	YTD 2025	YTD 2024	Change
Closed Sales	3,894	3,730	+4.4%	37,634	37,745	-0.3%
Median Sold Price	\$600,500	\$599,000	+0.3%	\$629,660	\$610,000	+3.2%
Median Days on Market	21 days	11 days	+10 days	12 days	8 days	+4 days
New Pending Sales	4,348	4,497	-3.3%	39,019	39,984	-2.4%
New Listings	5,529	4,922	+12.3%	57,308	53,067	+8.0%
Active Listings	10,993	7,902	+39.1%	10,993	7,902	+39.1%
Months of Supply	2.65	1.97	+0.68 mos.	2.65	1.97	+0.68 mos.
Showings	90,805	91,257	-0.5%	836,607	867,394	-3.5%

Housing Market Trends

Housing market conditions uncertain in the Washington D.C. metro area. A drop in mortgage rates boosted home sales in September, though the outlook for the area housing market remains uncertain.

There were 3,894 closed sales in September across the D.C. region, a 4.4% increase over last year. However, the number of new pending sales fell by 3.3% year-over-year as mortgage rates stabilized and concerns about a federal government shutdown weighed on potential buyers.

Regionally, home price growth has stalled. In September, the median sold price in the region was \$600,500, up just 0.3% from a year ago. However, in September there was a lot of variation in prices across the Washington D.C. metro.

Homes are taking much longer to sell. In September, the median days on market in the Washington D.C. metro area was 21 days, up 10 days from last September.

Market Outlook

The Washington D.C. area has been disproportionately impacted by federal workforce layoffs and budget cuts and now faces the potential of a lengthy government shutdown. Some buyers will be able to capitalize on lower rates and more inventory. Overall, however, expect slower home sales and softer home prices in fall amidst the ongoing uncertainty.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2025

2024

2020-2023 Range

3,894

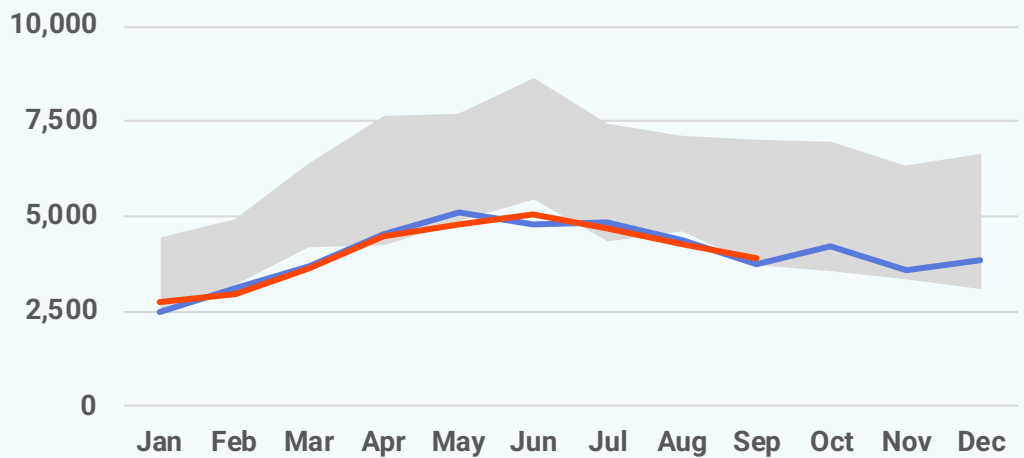
September 2025

+4.4%

Sep '25 vs. Sep '24
(Sep '24: 3,730)

-8.7%

Sep '25 vs. Aug '25
(Aug '25: 4,264)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$600,500

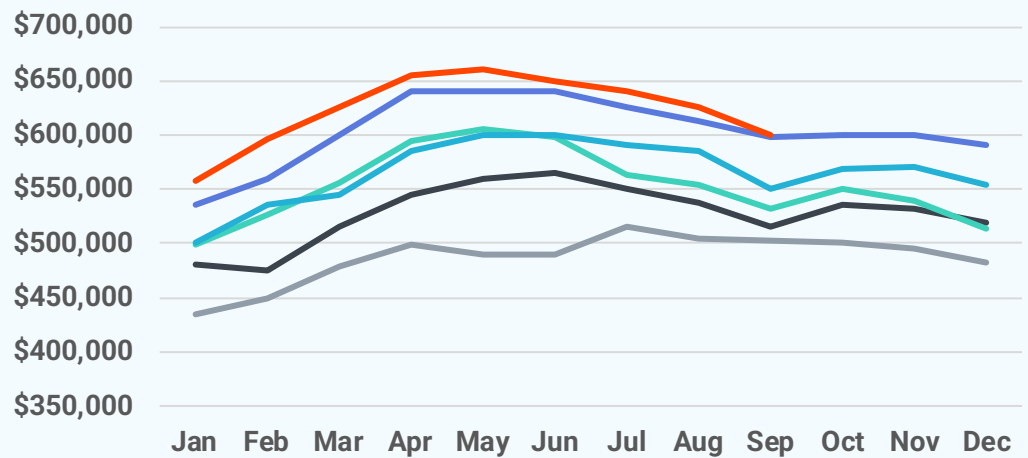
September 2025

+0.3%

Sep '25 vs. Sep '24
(Sep '24: \$599,000)

-3.9%

Sep '25 vs. Aug '25
(Aug '25: \$625,000)



Median Days on Market

21 days

September 2025

+10 days

Sep '25 vs. Sep '24
(Sep '24: 11 days)

+2 days

Sep '25 vs. Aug '25
(Aug '25: 19 days)



New Pending Sales

2025

2024

2020-2023 Range

4,348

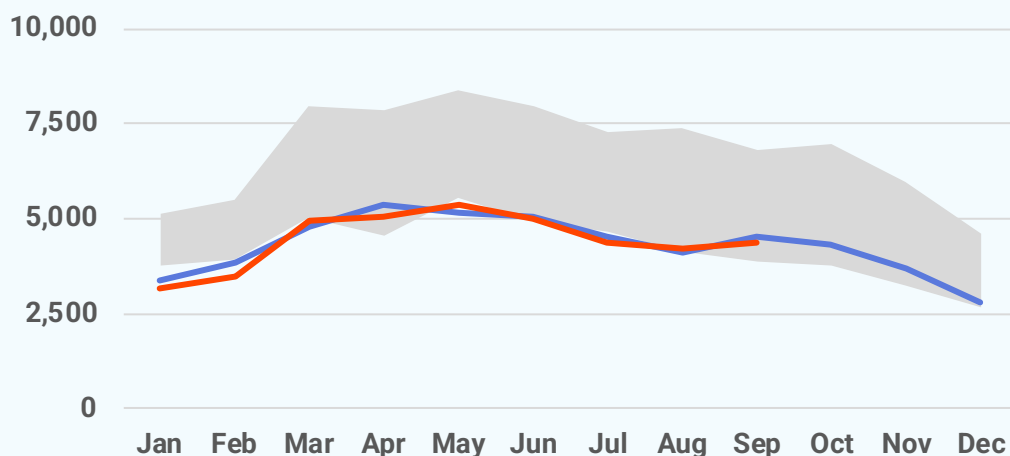
September 2025

-3.3%

Sep '25 vs. Sep '24
(Sep '24: 4,497)

+3.1%

Sep '25 vs. Aug '25
(Aug '25: 4,217)



New Listings

2025

2024

2020-2023 Range

5,529

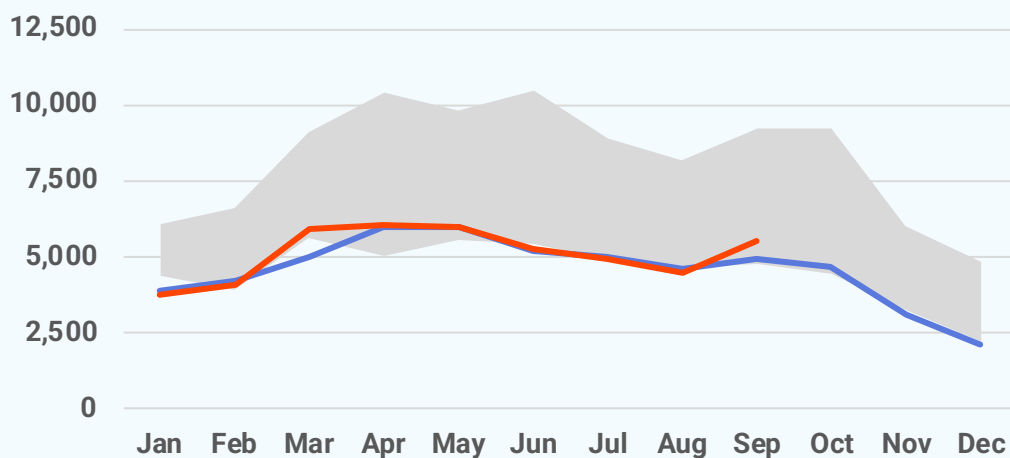
September 2025

+12.3%

Sep '25 vs. Sep '24
(Sep '24: 4,922)

+23.7%

Sep '25 vs. Aug '25
(Aug '25: 4,469)



Active Listings

10,993

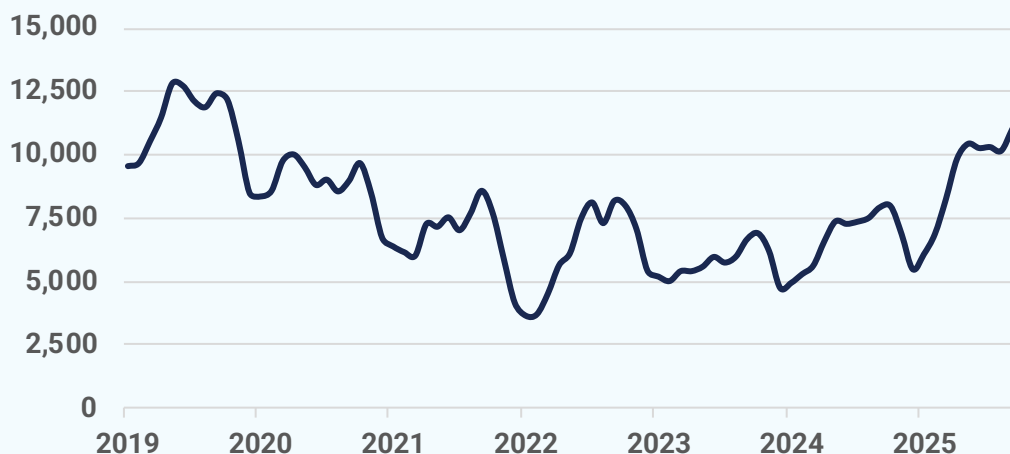
September 2025

+39.1%

Sep '25 vs. Sep '24
(Sep '24: 7,902)

+8.5%

Sep '25 vs. Aug '25
(Aug '25: 10,136)



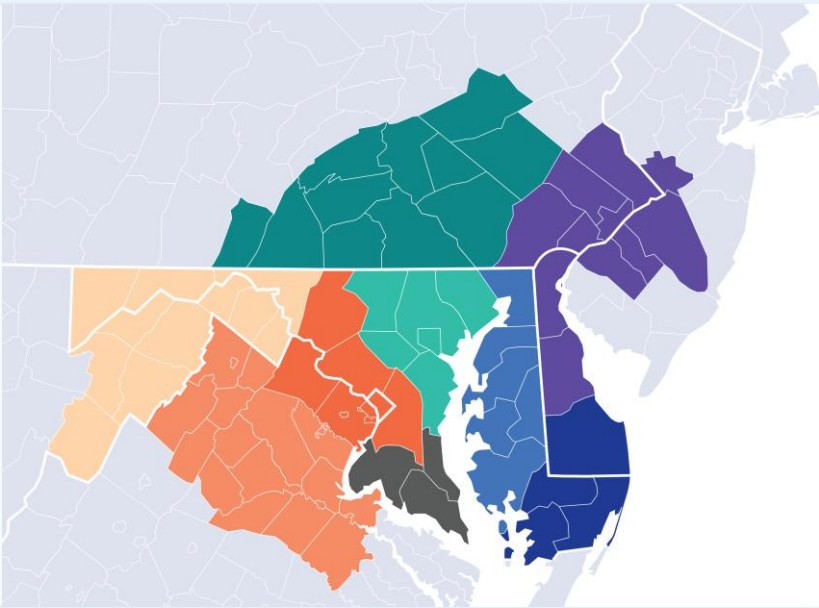
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Sep '25	vs. Sep '24	Sep '25	vs. Sep '24	Sep '25	vs. Sep '24
Washington, D.C. Metro	3,894	+4.4%	\$600,500	+0.3%	21 days	+10 days
Alexandria City, VA	167	+22.8%	\$745,000	+8.8%	14 days	+1 day
Arlington County, VA	184	+28.7%	\$686,388	-10.7%	22 days	+12 days
Fairfax City, VA	40	+42.9%	\$883,725	+20.9%	14 days	+8 days
Fairfax County, VA	953	+3.6%	\$710,000	-1.4%	15 days	+6 days
Falls Church City, VA	7	+0.0%	\$939,000	-24.3%	63 days	+59 days
Frederick County, MD	306	+5.2%	\$464,500	-5.2%	19 days	+10 days
Loudoun County, VA	411	+5.7%	\$752,580	+6.3%	23 days	+13 days
Montgomery County, MD	752	+10.3%	\$599,450	+2.5%	22 days	+13 days
Prince George's County, MD	647	-14.2%	\$450,000	+2.1%	25 days	+11 days
Washington, DC	427	+12.4%	\$680,000	+13.3%	40 days	+10 days

Local Markets	New Pending Sales		New Listings		Showings	
	Sep '25	vs. Sep '24	Sep '25	vs. Sep '24	Sep '25	vs. Sep '24
Washington, D.C. Metro	4,348	-3.3%	5,529	+12.3%	90,805	-0.5%
Alexandria City, VA	165	+9.3%	196	+21.0%	2,964	+6.4%
Arlington County, VA	191	+7.3%	262	+24.2%	4,115	+19.2%
Fairfax City, VA	26	-10.3%	32	-25.6%	558	-10.1%
Fairfax County, VA	1,040	+2.5%	1,130	+17.3%	21,269	+2.4%
Falls Church City, VA	14	+40.0%	20	+185.7%	225	+1.8%
Frederick County, MD	326	+2.5%	400	+22.7%	5,278	+3.6%
Loudoun County, VA	454	-0.7%	490	+1.0%	8,493	+8.9%
Montgomery County, MD	857	-2.4%	1,043	+17.1%	19,818	+3.0%
Prince George's County, MD	725	-12.8%	810	+1.6%	16,149	-10.9%
Washington, DC	550	-12.7%	1,146	+10.5%	11,936	-9.2%

Local Markets	Active Listings		Months of Supply	
	Sep '25	vs. Sep '24	Sep '25	vs. Sep '24
Washington, D.C. Metro	10,993	+39.1%	2.65	+0.68 months
Alexandria City, VA	366	+50.6%	2.25	+0.73 months
Arlington County, VA	475	+51.8%	2.51	+0.76 months
Fairfax City, VA	51	+15.9%	1.89	+0.13 months
Fairfax County, VA	1,715	+33.6%	1.75	+0.39 months
Falls Church City, VA	53	+488.9%	4.42	+3.6 months
Frederick County, MD	745	+61.6%	2.52	+0.96 months
Loudoun County, VA	769	+33.3%	1.75	+0.29 months
Montgomery County, MD	1,923	+60.3%	2.39	+0.82 months
Prince George's County, MD	1,888	+61.1%	2.74	+1.11 months
Washington, DC	3,008	+15.7%	5.57	+0.52 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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