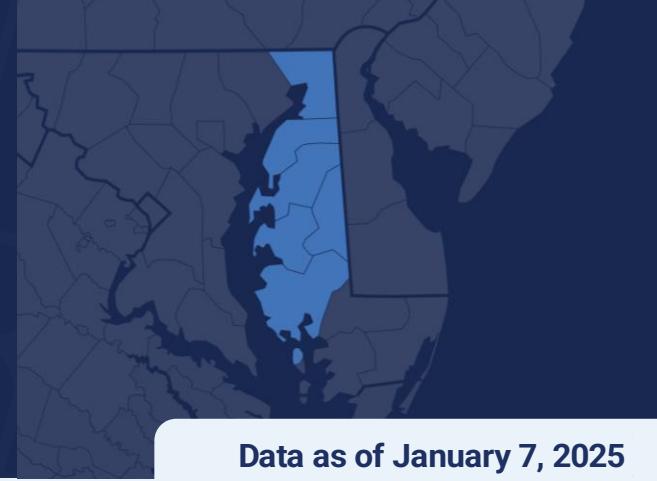


December 2025 Housing Market Report

Prepared by Bright Research

Data as of January 7, 2025



Key Market Statistics	Dec 2025	Dec 2024	Change	YTD 2025	YTD 2024	Change
Closed Sales	307	287	+7.0%	3,647	3,750	-2.7%
Median Sold Price	\$399,000	\$375,000	+6.4%	\$395,000	\$380,000	+3.9%
Median Days on Market	41 days	23 days	+18 days	25 days	16 days	+9 days
New Pending Sales	227	193	+17.6%	3,699	3,716	-0.5%
New Listings	217	195	+11.3%	5,013	4,852	+3.3%
Active Listings	939	814	+15.4%	939	814	+15.4%
Months of Supply	3.10	2.61	+0.49 mos.	3.10	2.61	+0.49 mos.
Showings	2,710	2,343	+15.7%	48,247	45,997	+4.9%

Housing Market Trends

A December sales spike on the Eastern Shore did not offset the region's sluggish year. There were 307 closed sales on the Maryland Eastern Shore in December 2025, outpacing December 2024 by 7.0%. Yet closed sales for the year as a whole lagged by 2.7%. Within the region, the bright spots for transactions were Talbot, Caroline, and Cecil counties, where sales were modestly higher in 2025 than in 2024..

Buyers also submitted more contracts this December than last year. Lower mortgage rates may have been the push some buyers needed to assist with affordability. Price levels remain elevated with the median price for 2025 at \$395,000, 3.9% higher than 2024.

The housing market has seen shifts throughout 2025. Homes stay on the market longer due to restricted demand and inventory growth. Overall, the Eastern Shore has 15.4% more homes available at the end of 2025. Only Queen Anne's County has a tighter supply than last year.

Market Outlook

Demand was dampened in 2025 by continued affordability constraints and economic uncertainty. While both will remain part of the market in 2026, the Maryland Eastern Shore is ready to rebound, at least to some extent, in the new year. Overall transactions will be lower than average, but sales should surpass 2025 and price growth will ease for buyers.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2025

2024

2020-2023 Range

307

December 2025

+7.0%

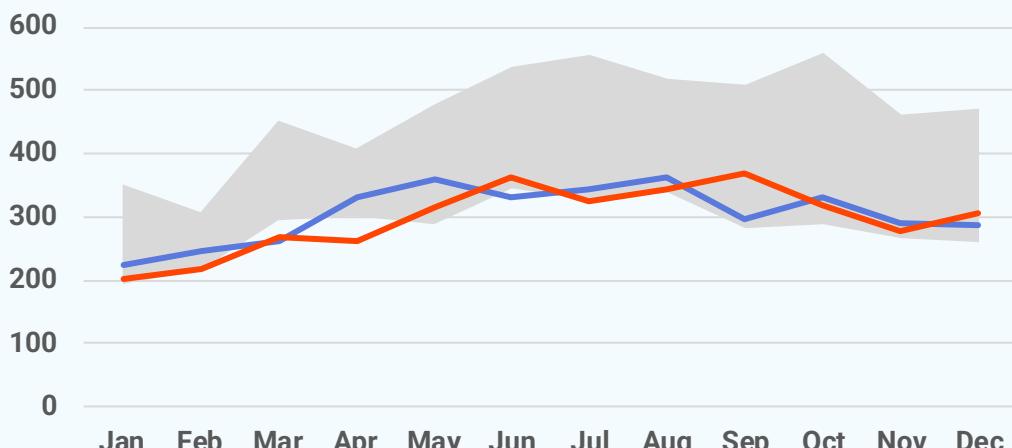
Dec '25 vs. Dec '24

(Dec '24: 287)

+10.4%

Dec '25 vs. Nov '25

(Nov '25: 278)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$399,000

December 2025

+6.4%

Dec '25 vs. Dec '24

(Dec '24: \$375,000)

-1.5%

Dec '25 vs. Nov '25

(Nov '25: \$405,000)



Median Days on Market

41 days

December 2025

+18 days

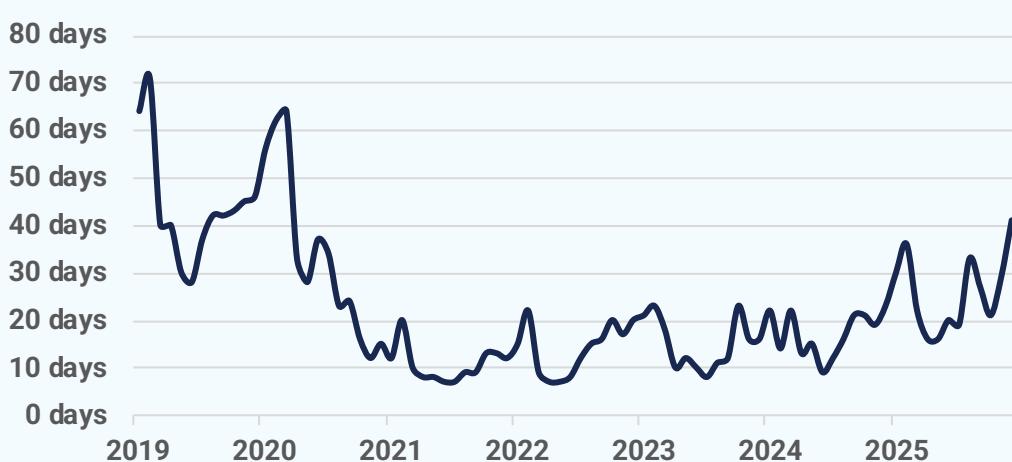
Dec '25 vs. Dec '24

(Dec '24: 23 days)

+12 days

Dec '25 vs. Nov '25

(Nov '25: 29 days)



New Pending Sales

2025

2024

2020-2023 Range

227

December 2025

+17.6%

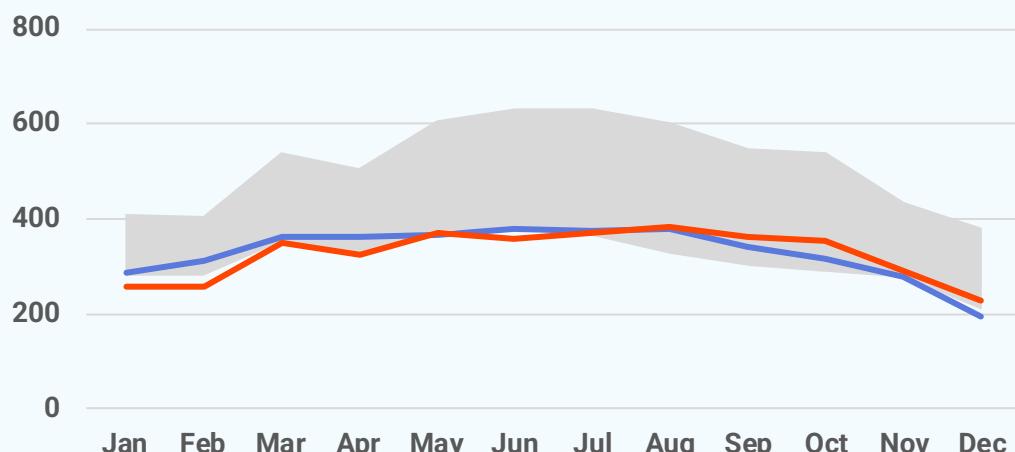
Dec '25 vs. Dec '24

(Dec '24: 193)

-22.0%

Dec '25 vs. Nov '25

(Nov '25: 291)



New Listings

2025

2024

2020-2023 Range

217

December 2025

+11.3%

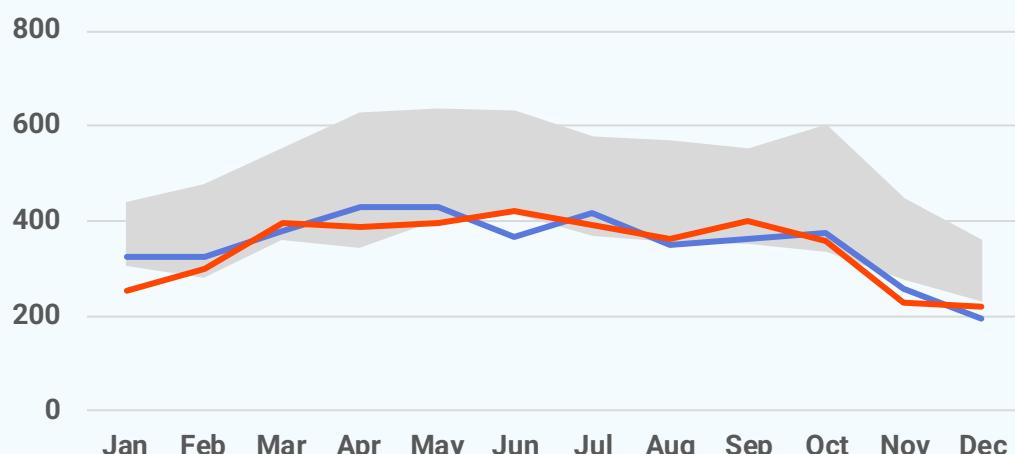
Dec '25 vs. Dec '24

(Dec '24: 195)

-5.2%

Dec '25 vs. Nov '25

(Nov '25: 229)



Active Listings

939

December 2025

+15.4%

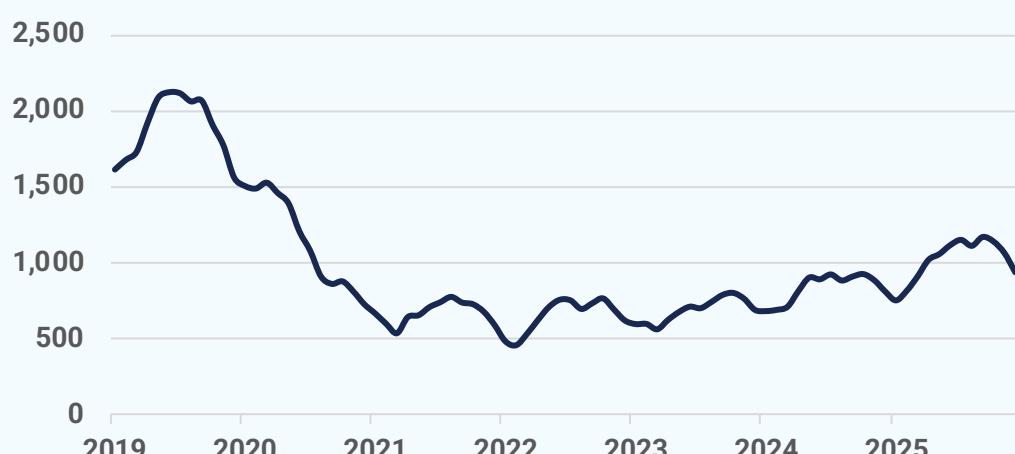
Dec '25 vs. Dec '24

(Dec '24: 814)

-11.8%

Dec '25 vs. Nov '25

(Nov '25: 1,065)



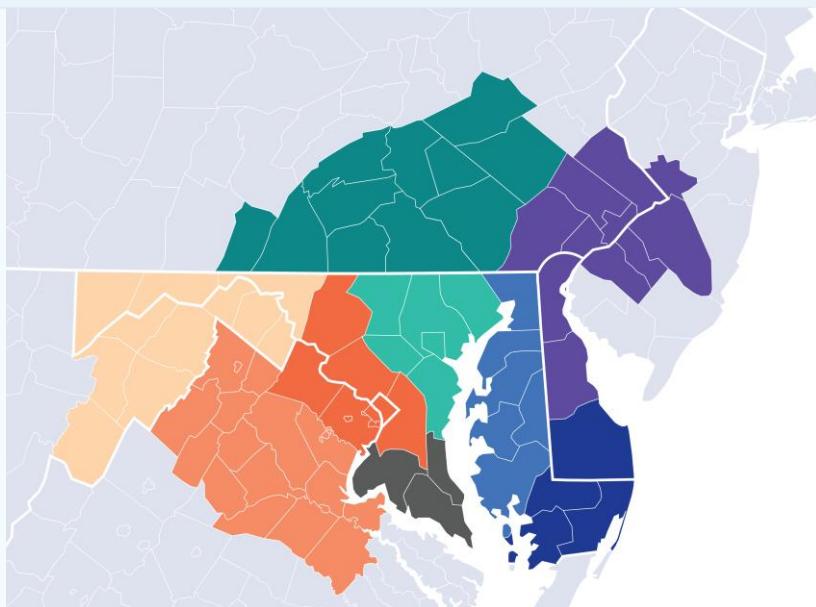
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
MD Eastern Shore	307	+7.0%	\$399,000	+6.4%	41 days	+18 days
Caroline County, MD	27	-10.0%	\$300,000	-11.1%	23 days	-20 days
Cecil County, MD	102	+36.0%	\$355,000	+8.1%	19 days	+6 days
Dorchester County, MD	37	-15.9%	\$295,000	-4.4%	88 days	+43 days
Kent County, MD	19	-32.1%	\$349,900	-0.7%	70 days	+43 days
Queen Anne's County, MD	69	-2.8%	\$519,215	-0.9%	49 days	+22 days
Talbot County, MD	53	+35.9%	\$485,000	+13.1%	48 days	+28 days

Local Markets	New Pending Sales		New Listings		Showings	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
MD Eastern Shore	227	+17.6%	217	+11.3%	2,710	+15.7%
Caroline County, MD	30	+100.0%	30	+0.0%	343	+36.1%
Cecil County, MD	68	+28.3%	70	+40.0%	858	+26.2%
Dorchester County, MD	25	-34.2%	41	+41.4%	355	+15.6%
Kent County, MD	18	+28.6%	18	+125.0%	162	-4.1%
Queen Anne's County, MD	46	+4.5%	28	-42.9%	564	-6.2%
Talbot County, MD	40	+37.9%	30	+3.4%	428	+28.1%

Local Markets	Active Listings		Months of Supply	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
MD Eastern Shore	939	+15.4%	3.10	+0.49 months
Caroline County, MD	98	+12.6%	3.38	+0.27 months
Cecil County, MD	202	+2.0%	2.20	+0.05 months
Dorchester County, MD	203	+40.0%	5.34	+2.12 months
Kent County, MD	79	+11.3%	3.43	+0.7 months
Queen Anne's County, MD	158	-3.1%	2.23	-0.03 months
Talbot County, MD	199	+32.7%	4.15	+0.96 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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