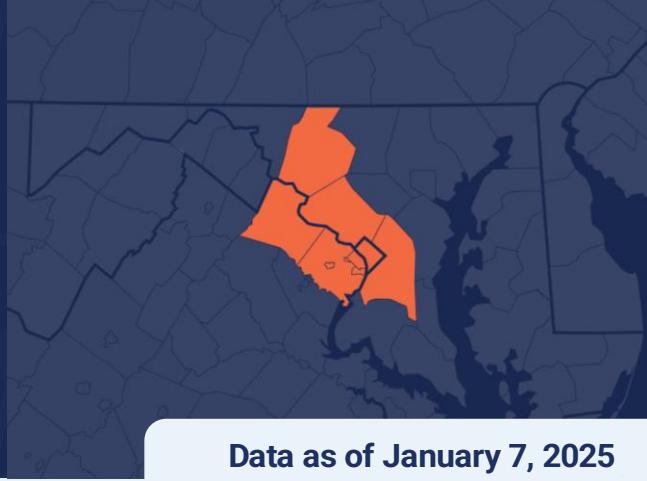


December 2025 Housing Market Report

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	3,780	3,858	-2.0%	49,408	49,942	-1.1%
Median Sold Price	\$620,000	\$590,000	+5.1%	\$627,000	\$605,000	+3.6%
Median Days on Market	27 days	19 days	+8 days	14 days	9 days	+5 days
New Pending Sales	2,795	2,768	+1.0%	49,321	50,578	-2.5%
New Listings	2,133	2,126	+0.3%	69,989	65,754	+6.4%
Active Listings	7,044	5,468	+28.8%	7,044	5,468	+28.8%
Months of Supply	1.71	1.31	+0.4 mos.	1.71	1.31	+0.4 mos.
Showings	55,144	56,866	-3.0%	1,056,221	1,087,456	-2.9%

Housing Market Trends

Sales lower in December and overall 2025 sales below 2024 in the D.C. Metro Area. Closed sales in the final month of the year in the D.C. metro area were 2.0% lower than December 2024. Overall, 2025 sales tracked 1.1% lower than 2024. New pending sales were modestly better, up 1.0% in December, but overall stayed behind 2024.

Within the D.C. region, there were different trends in local markets. Loudoun and Arlington counties had gains in closed sales in 2025 compared to 2024. Meanwhile, Prince Georges County had significantly fewer sales in 2025.

Federal government layoffs, economic uncertainty, and continued affordability pressure put a damper on buyers. Sellers were a bit more active in the 2025 market relative to 2024. New listings for the year were 6.4% higher with gains across all counties except D.C. proper. The median price in the region rose 3.6% in 2025, but price growth has started to soften.

Market Outlook

The Washington D.C. area housing market has been burdened by multiple headwinds over the past year. In 2026, we should see falling rates, improved affordability and more inventory. There will still be a lot of uncertainty in the market. Sellers should expect that buyers will have more leverage and price growth will soften further, with price drops possible in some local markets.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2025

2024

2020-2023 Range

3,780

December 2025

-2.0%

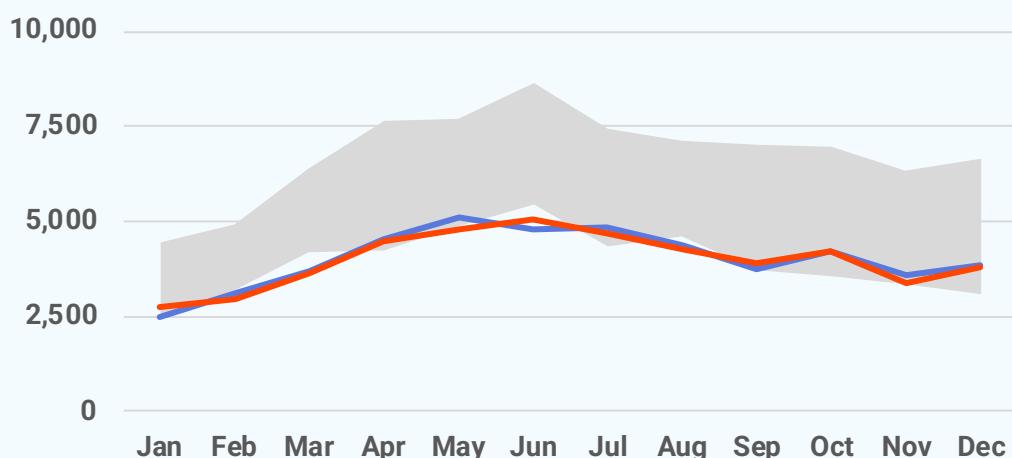
Dec '25 vs. Dec '24

(Dec '24: 3,858)

+12.7%

Dec '25 vs. Nov '25

(Nov '25: 3,355)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$620,000

December 2025

+5.1%

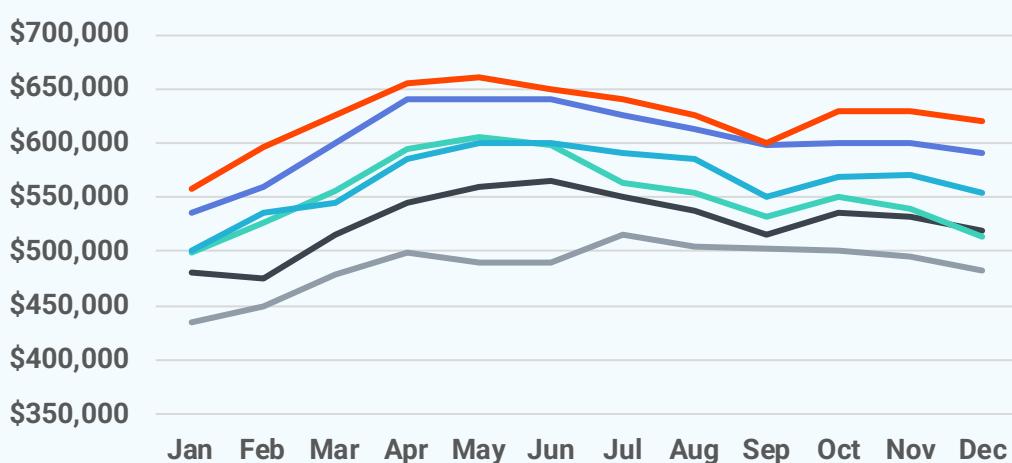
Dec '25 vs. Dec '24

(Dec '24: \$590,000)

-1.6%

Dec '25 vs. Nov '25

(Nov '25: \$630,000)



Median Days on Market

27 days

December 2025

+8 days

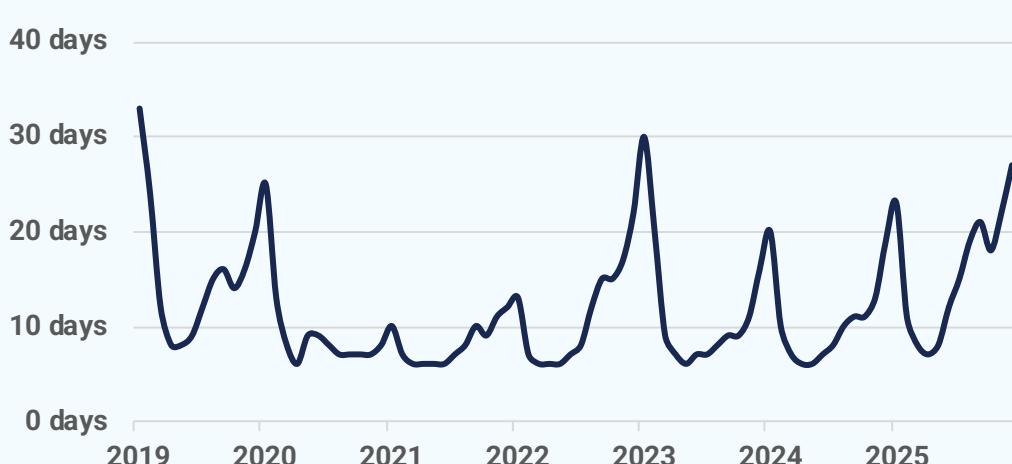
Dec '25 vs. Dec '24

(Dec '24: 19 days)

+5 days

Dec '25 vs. Nov '25

(Nov '25: 22 days)



New Pending Sales

2025

2024

2020-2023 Range

2,795

December 2025

+1.0%

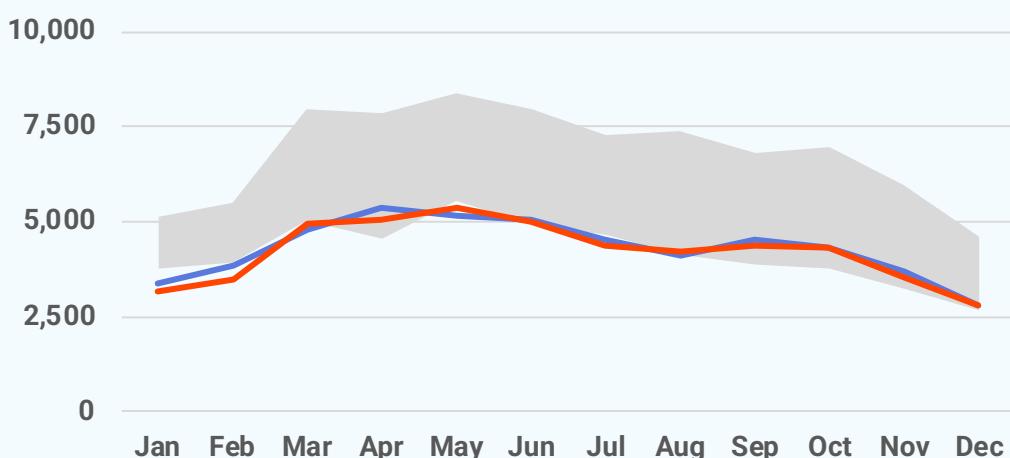
Dec '25 vs. Dec '24

(Dec '24: 2,768)

-20.8%

Dec '25 vs. Nov '25

(Nov '25: 3,529)



New Listings

2025

2024

2020-2023 Range

2,133

December 2025

+0.3%

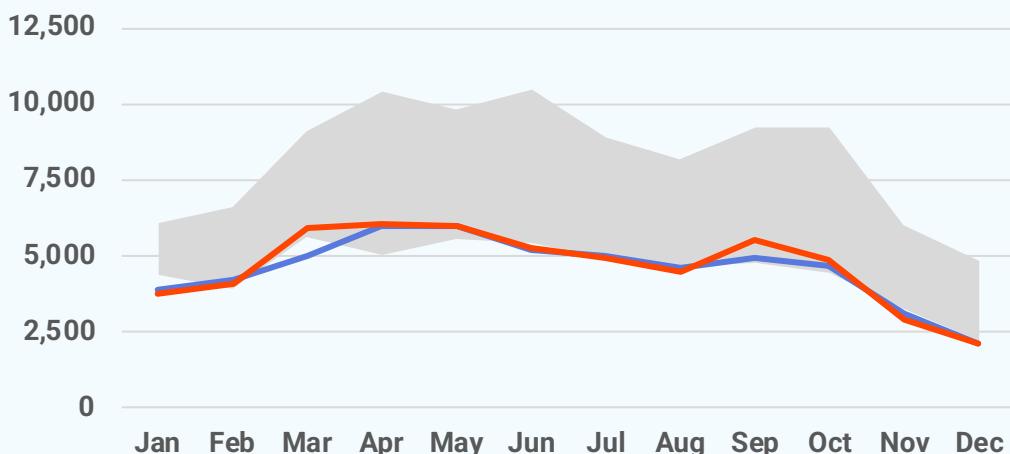
Dec '25 vs. Dec '24

(Dec '24: 2,126)

-27.1%

Dec '25 vs. Nov '25

(Nov '25: 2,927)



Active Listings

7,044

December 2025

+28.8%

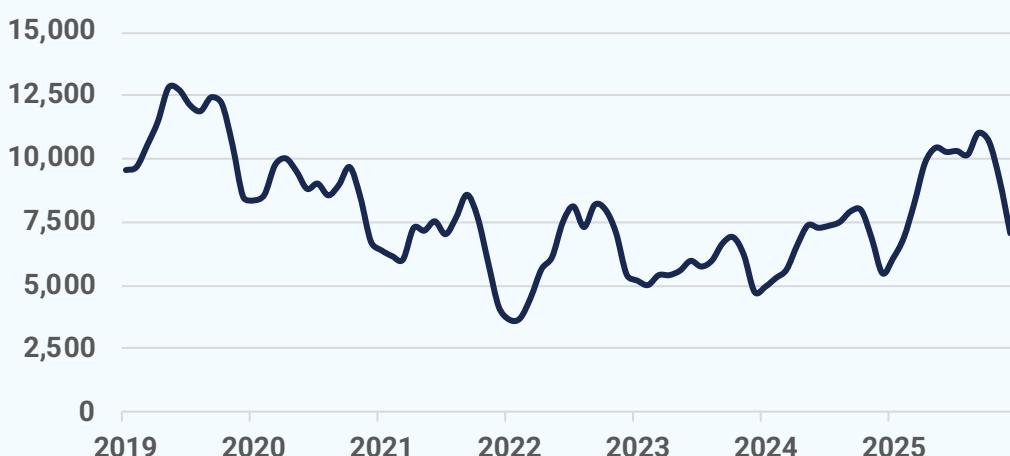
Dec '25 vs. Dec '24

(Dec '24: 5,468)

-22.9%

Dec '25 vs. Nov '25

(Nov '25: 9,142)



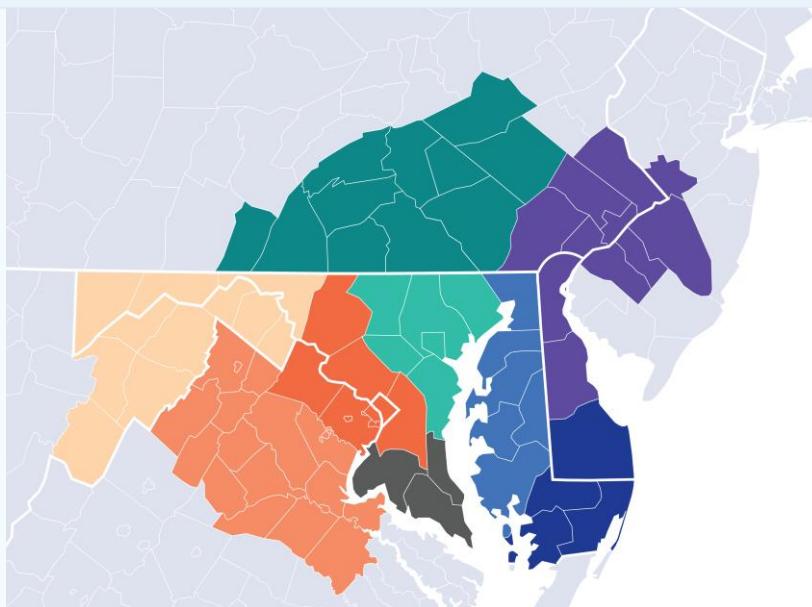
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
Washington, D.C. Metro	3,780	-2.0%	\$620,000	+5.1%	27 days	+8 days
Alexandria City, VA	143	+15.3%	\$605,000	+5.5%	41 days	+14 days
Arlington County, VA	183	+27.1%	\$745,000	-11.0%	33 days	+14 days
Fairfax City, VA	30	+50.0%	\$757,500	+1.7%	27 days	+22 days
Fairfax County, VA	830	-1.8%	\$725,000	+3.6%	21 days	+8 days
Falls Church City, VA	11	+120.0%	\$1,199,000	+91.8%	7 days	-67 days
Frederick County, MD	297	+0.0%	\$488,926	+8.2%	31 days	+13 days
Loudoun County, VA	399	+3.6%	\$735,000	-0.1%	23 days	+14 days
Montgomery County, MD	806	+5.2%	\$639,000	+3.7%	24 days	+7 days
Prince George's County, MD	621	-16.3%	\$450,000	+0.6%	29 days	+7 days
Washington, DC	460	-13.2%	\$720,000	+14.7%	43 days	+0 days

Local Markets	New Pending Sales		New Listings		Showings	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
Washington, D.C. Metro	2,795	+1.0%	2,133	+0.3%	55,144	-3.0%
Alexandria City, VA	95	-2.1%	62	+3.3%	1,590	-16.4%
Arlington County, VA	100	-10.7%	69	-5.5%	1,792	-16.8%
Fairfax City, VA	19	+26.7%	5	-77.3%	441	+75.0%
Fairfax County, VA	593	+2.2%	361	-8.1%	12,190	-1.8%
Falls Church City, VA	11	+120.0%	5	+66.7%	114	+17.5%
Frederick County, MD	217	+1.9%	217	+23.3%	3,148	-3.8%
Loudoun County, VA	231	-6.1%	174	-10.3%	3,683	-8.2%
Montgomery County, MD	559	+7.5%	369	+12.5%	12,093	+3.0%
Prince George's County, MD	602	-1.0%	541	+11.5%	12,743	-1.5%
Washington, DC	368	-1.1%	330	-15.8%	7,350	-8.9%

Local Markets	Active Listings		Months of Supply	
	Dec '25	vs. Dec '24	Dec '25	vs. Dec '24
Washington, D.C. Metro	7,044	+28.8%	1.71	+0.4 months
Alexandria City, VA	229	+54.7%	1.39	+0.48 months
Arlington County, VA	249	+18.0%	1.30	+0.15 months
Fairfax City, VA	22	-8.3%	0.76	-0.24 months
Fairfax County, VA	907	+32.2%	0.92	+0.22 months
Falls Church City, VA	31	+34.8%	2.21	-0.09 months
Frederick County, MD	505	+51.2%	1.71	+0.61 months
Loudoun County, VA	368	+15.7%	0.83	+0.07 months
Montgomery County, MD	1,180	+51.7%	1.46	+0.49 months
Prince George's County, MD	1,534	+50.1%	2.32	+0.94 months
Washington, DC	2,019	+4.9%	3.84	+0.2 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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