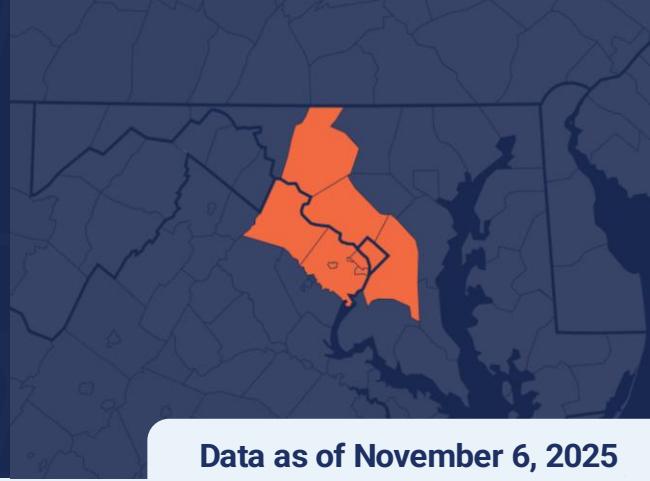


October 2025 Housing Market Report

Prepared by Bright Research

Data as of November 6, 2025



Key Market Statistics	Oct 2025	Oct 2024	Change	YTD 2025	YTD 2024	Change
Closed Sales	4,201	4,207	-0.1%	41,982	42,143	-0.4%
Median Sold Price	\$630,000	\$600,000	+5.0%	\$629,000	\$609,765	+3.2%
Median Days on Market	18 days	11 days	+7 days	13 days	8 days	+5 days
New Pending Sales	4,335	4,304	+0.7%	43,215	44,241	-2.3%
New Listings	4,861	4,669	+4.1%	63,325	58,885	+7.5%
Active Listings	10,661	7,952	+34.1%	10,661	7,952	+34.1%
Months of Supply	2.57	1.95	+0.62 mos.	2.57	1.95	+0.62 mos.
Showings	87,772	87,144	+0.7%	924,379	954,538	-3.2%

Housing Market Trends

Cracks showing in parts of the Washington D.C. housing market. Against a background of economic uncertainty, prospective buyers and sellers in some markets in the D.C. region are moving cautiously. Regionwide, the number of closed sales in October was down 0.1% compared to a year ago. New pending sales were up by just 0.7% year-over-year, despite mortgage rates at a 13-month low.

The regional numbers are primarily being driven by the District of Columbia, where the market has chilled considerably since August. Closed sales were down by 9.3% year-over-year in October in the District and new pending contracts were 15.6% lower than last year.

Inventory is increasing faster in the Washington D.C. region than in other parts of the Mid-Atlantic. At the end of October, there were 10,661 homes available for sale across the metro area, a 34.1% increase from a year ago.

The median sold price in October was \$630,000, which reflects a 5.0% year-over-year gain. Relatively more higher-end buyers are driving this increase in the median price.

Market Outlook

As the federal government shutdown enters its second month and the prospects of more layoffs in the region increases, the overall Washington D.C. metro area housing market will be weaker than most other Mid-Atlantic housing markets at the end of 2025. However, some local markets will be more impacted than others, particularly those with large numbers of federal workers.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2025

2024

2020-2023 Range

4,201

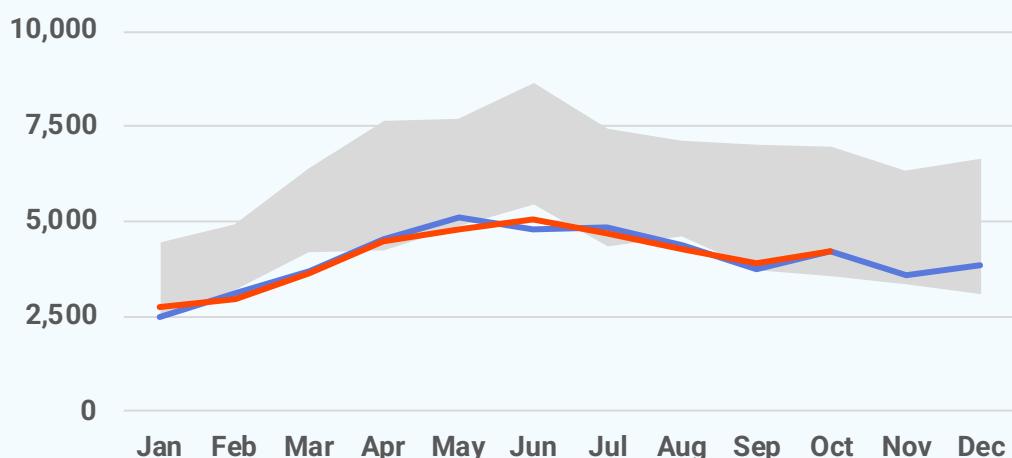
October 2025

-0.1%

Oct '25 vs. Oct '24
(Oct '24: 4,207)

+7.9%

Oct '25 vs. Sep '25
(Sep '25: 3,894)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$630,000

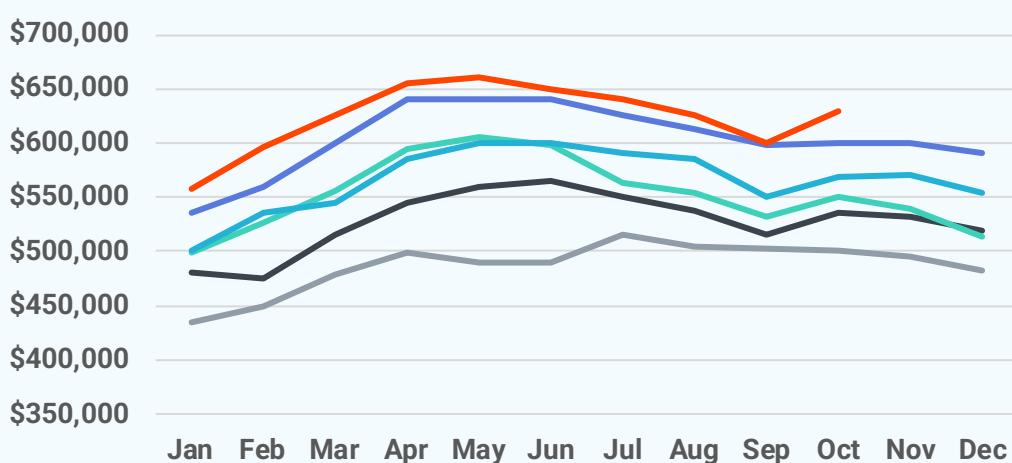
October 2025

+5.0%

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

+4.9%

Oct '25 vs. Sep '25
(Sep '25: \$600,500)



Median Days on Market

18 days

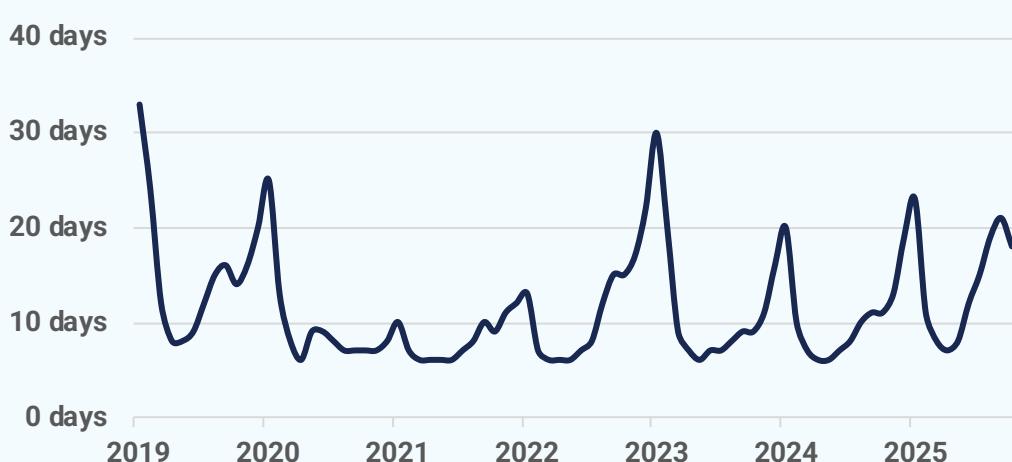
October 2025

+7 days

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

-3 days

Oct '25 vs. Sep '25
(Sep '25: 21 days)



New Pending Sales

2025

2024

2020-2023 Range

4,335

October 2025

+0.7%

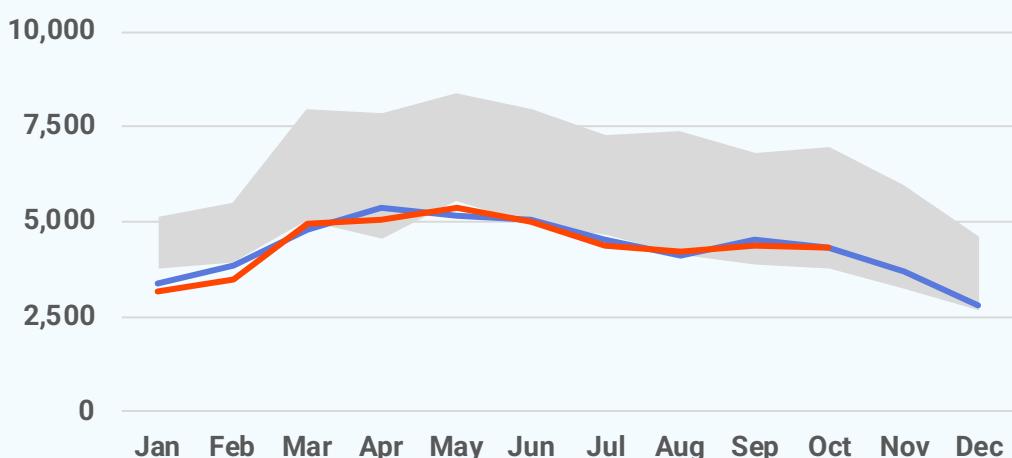
Oct '25 vs. Oct '24

(Oct '24: 4,304)

-0.3%

Oct '25 vs. Sep '25

(Sep '25: 4,348)



New Listings

2025

2024

2020-2023 Range

4,861

October 2025

+4.1%

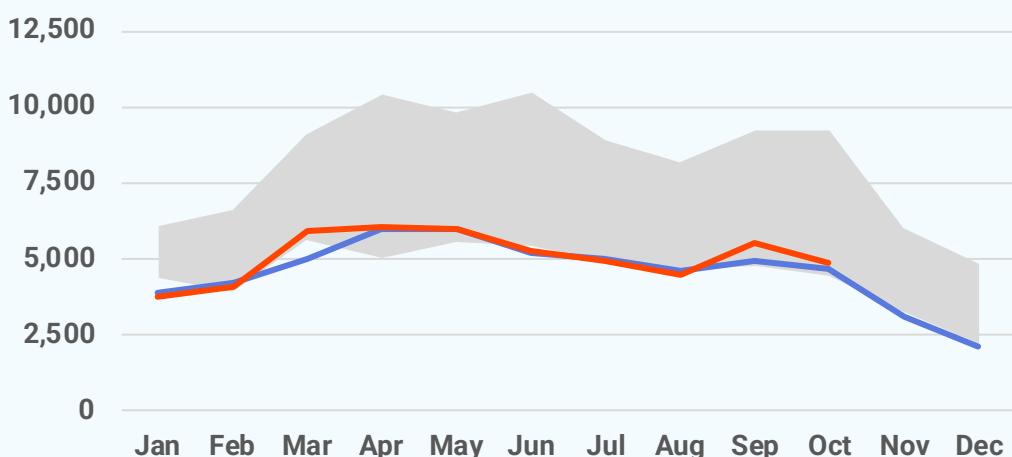
Oct '25 vs. Oct '24

(Oct '24: 4,669)

-12.1%

Oct '25 vs. Sep '25

(Sep '25: 5,529)



Active Listings

10,661

October 2025

+34.1%

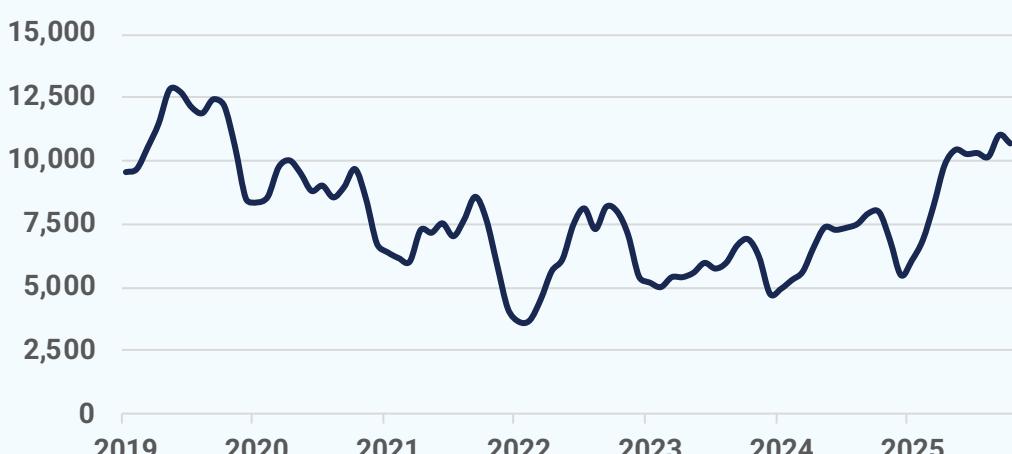
Oct '25 vs. Oct '24

(Oct '24: 7,952)

-3.0%

Oct '25 vs. Sep '25

(Sep '25: 10,993)



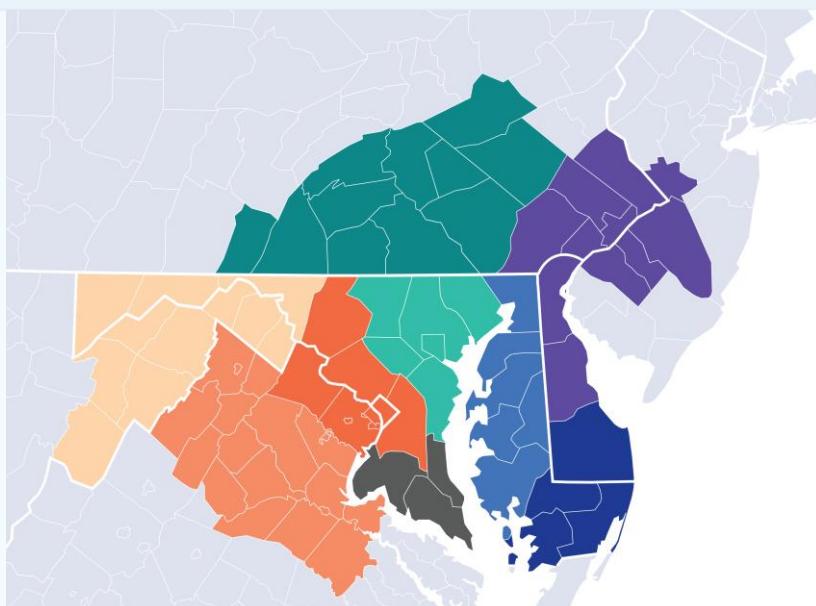
Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Oct '25	vs. Oct '24	Oct '25	vs. Oct '24	Oct '25	vs. Oct '24
Washington, D.C. Metro	4,201	-0.1%	\$630,000	+5.0%	18 days	+7 days
Alexandria City, VA	172	+11.0%	\$751,500	+20.2%	13 days	+2 days
Arlington County, VA	191	+9.1%	\$787,500	+20.2%	12 days	+1 day
Fairfax City, VA	20	-13.0%	\$810,000	+8.0%	34 days	+29 days
Fairfax County, VA	1,027	+6.6%	\$745,000	+2.8%	14 days	+6 days
Falls Church City, VA	17	+54.5%	\$1,165,000	-15.3%	6 days	-2 days
Frederick County, MD	313	+6.1%	\$485,000	-1.2%	22 days	+8 days
Loudoun County, VA	478	+3.2%	\$741,000	+2.2%	15 days	+6 days
Montgomery County, MD	843	-2.2%	\$625,000	+1.0%	15 days	+5 days
Prince George's County, MD	651	-9.7%	\$452,782	+2.7%	29 days	+13 days
Washington, DC	489	-9.3%	\$675,000	+2.3%	26 days	+8 days

Local Markets	New Pending Sales		New Listings		Showings	
	Oct '25	vs. Oct '24	Oct '25	vs. Oct '24	Oct '25	vs. Oct '24
Washington, D.C. Metro	4,335	+0.7%	4,861	+4.1%	87,772	+0.7%
Alexandria City, VA	164	+5.8%	177	+11.3%	2,964	-1.5%
Arlington County, VA	192	+1.1%	217	+19.2%	3,510	+6.7%
Fairfax City, VA	25	+13.6%	25	+25.0%	478	+28.2%
Fairfax County, VA	955	-1.1%	939	+6.9%	20,597	-0.1%
Falls Church City, VA	16	+77.8%	16	+14.3%	191	+18.6%
Frederick County, MD	334	+18.0%	370	+10.4%	5,123	-0.9%
Loudoun County, VA	458	+6.3%	420	+1.7%	7,662	+10.9%
Montgomery County, MD	894	+10.9%	950	+9.4%	19,604	+9.6%
Prince George's County, MD	734	-5.3%	881	+2.8%	16,288	-4.2%
Washington, DC	563	-15.6%	866	-8.2%	11,355	-10.6%

Local Markets	Active Listings		Months of Supply	
	Oct '25	vs. Oct '24	Oct '25	vs. Oct '24
Washington, D.C. Metro	10,661	+34.1%	2.57	+0.62 months
Alexandria City, VA	367	+51.0%	2.24	+0.72 months
Arlington County, VA	472	+63.9%	2.48	+0.9 months
Fairfax City, VA	51	+37.8%	1.89	+0.35 months
Fairfax County, VA	1,625	+34.7%	1.65	+0.38 months
Falls Church City, VA	47	+67.9%	3.62	+1.07 months
Frederick County, MD	702	+40.7%	2.36	+0.69 months
Loudoun County, VA	653	+26.3%	1.48	+0.21 months
Montgomery County, MD	1,857	+47.5%	2.31	+0.71 months
Prince George's County, MD	1,947	+52.3%	2.85	+1.09 months
Washington, DC	2,940	+13.2%	5.49	+0.51 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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