

July 2025 Housing Market Report

Prepared by Bright Research

Data as of August 6, 2025

Key Market Statistics	Jul 2025	Jul 2024	Change	YTD 2025	YTD 2024	Change
Closed Sales	4,692	4,811	-2.5%	29,156	29,377	-0.8%
Median Sold Price	\$640,000	\$625,000	+2.4%	\$633,000	\$610,000	+3.8%
Median Days on Market	15 days	8 days	+7 days	11 days	7 days	+4 days
New Pending Sales	4,385	4,539	-3.4%	30,726	31,559	-2.6%
New Listings	4,922	4,989	-1.3%	44,537	41,423	+7.5%
Active Listings	10,283	7,341	+40.1%	10,283	7,341	+40.1%
Months of Supply	2.48	1.82	+0.66 mos.	2.48	1.82	+0.66 mos.
Showings	90,732	84,577	+7.3%	656,443	692,669	-5.2%

Housing Market Trends

Inventory is rising quickly in the Washington D.C. metro.

At the end of July, there were 10,283 active listings across the region, which is up 40.1% compared to a year ago. The inventory of attached homes and condos is now at or above pre-pandemic levels, but the number of single-family detached homes on the market is still very limited.

New listings in July were lower than a year ago; however, year-to-date new listings in the region are tracking 7.5% higher than 2024. At the same time, buyers are holding back. Closed sales were down 2.5% in July, while the number of new pending sales fell by 3.4%.

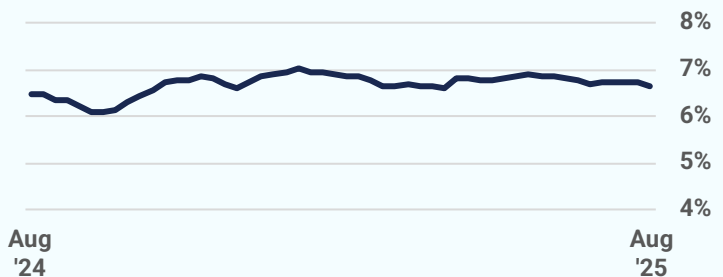
The median sold price in the region was \$640,000 in July, up 2.4% compared to a year ago. Stronger sales in the higher-end of the market is driving the increase in the median price.

Across the region, housing market activity is strongest in the District and close-in suburbs, while sales have dropped off more in the outer suburbs of the region.

Market Outlook

There has been uncertainty in the Washington D.C. area housing market as a result of federal government layoffs and budget cuts. As inventory rises, expect home price growth to soften as we head into fall. In some local markets, particularly in the further out jurisdictions, home prices could fall year-over-year. Buyers who remain in the market will have more leverage, though economic uncertainty will continue to keep some would-be buyers on the sidelines.

Weekly Avg. Mortgage Rate 30-yr fixed rate



Source: Freddie Mac

Closed Sales

2025

2024

2020-2023 Range

4,692

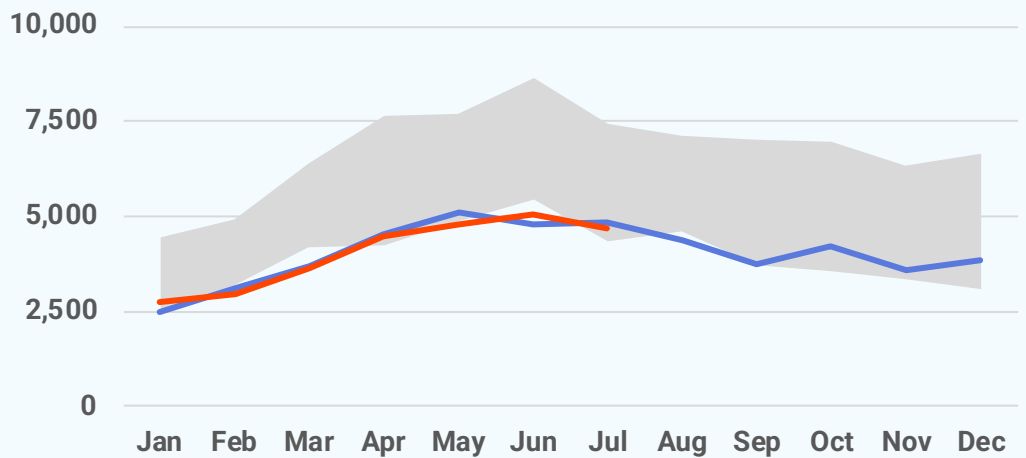
July 2025

-2.5%

Jul '25 vs. Jul '24
(Jul '24: 4,811)

-7.1%

Jul '25 vs. Jun '25
(Jun '25: 5,053)



Median Sold Price

2025

2024

2023

2022

2021

2020

\$640,000

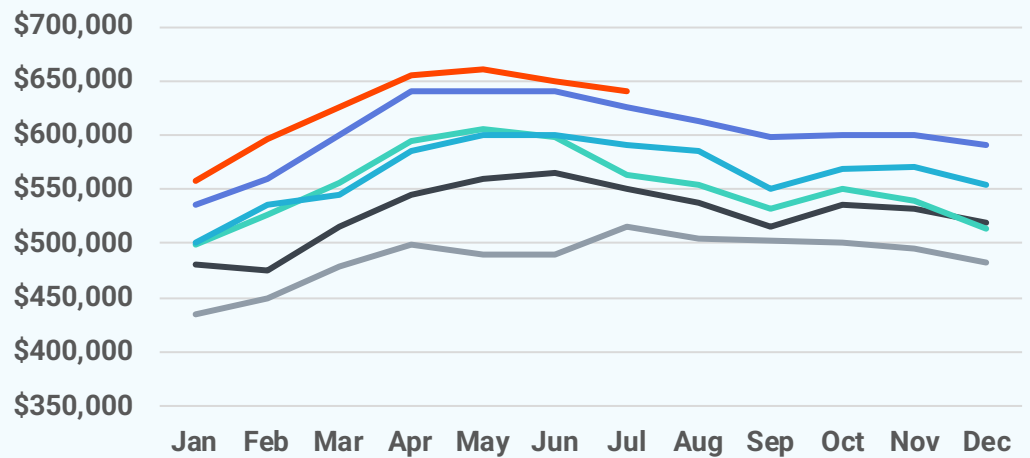
July 2025

+2.4%

Jul '25 vs. Jul '24
(Jul '24: \$625,000)

-1.5%

Jul '25 vs. Jun '25
(Jun '25: \$650,000)



Median Days on Market

15 days

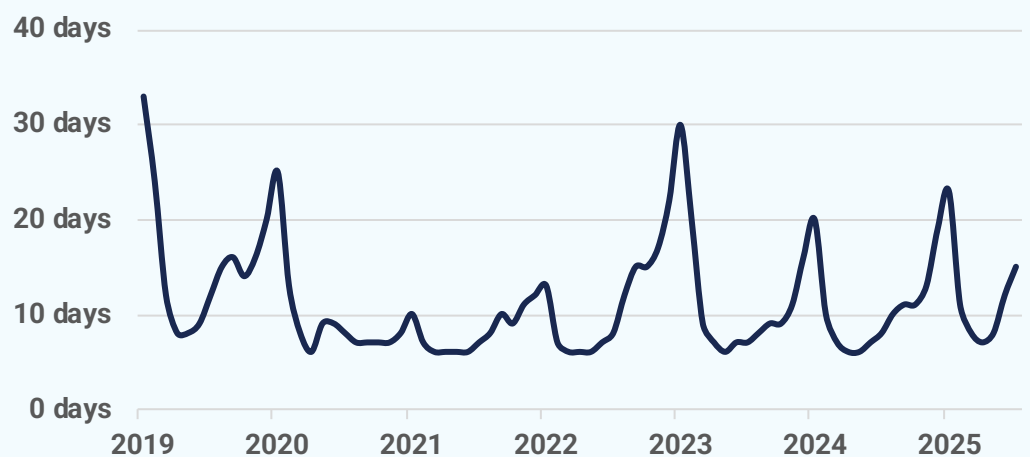
July 2025

+7 days

Jul '25 vs. Jul '24
(Jul '24: 8 days)

+3 days

Jul '25 vs. Jun '25
(Jun '25: 12 days)



New Pending Sales

2025

2024

2020-2023 Range

4,385

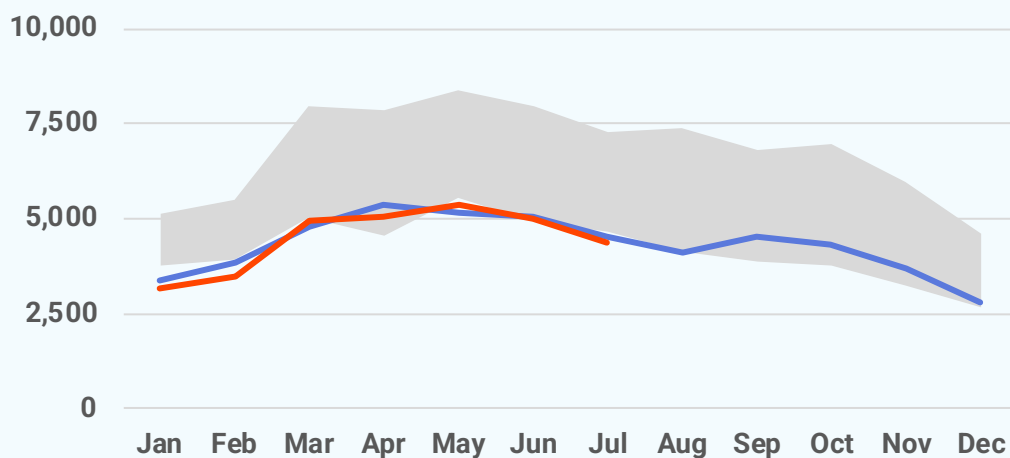
July 2025

-3.4%

Jul '25 vs. Jul '24
(Jul '24: 4,539)

-11.8%

Jul '25 vs. Jun '25
(Jun '25: 4,972)



New Listings

2025

2024

2020-2023 Range

4,922

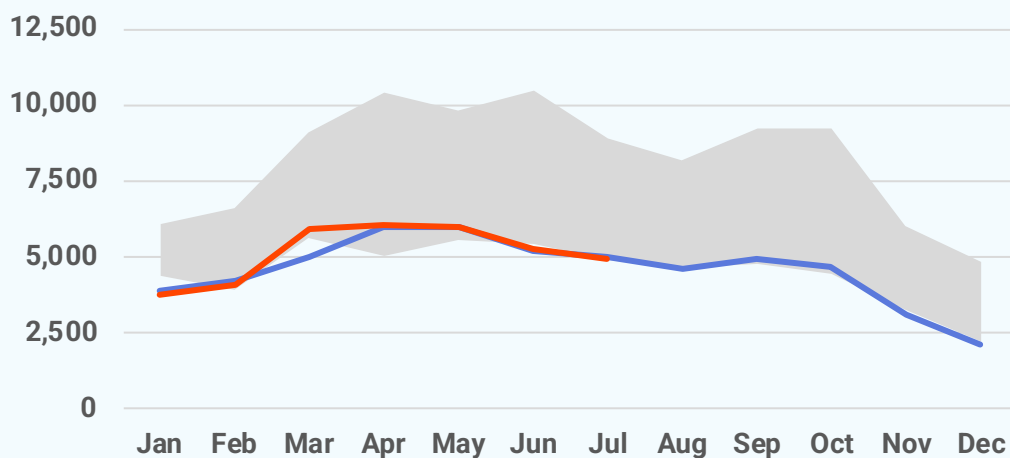
July 2025

-1.3%

Jul '25 vs. Jul '24
(Jul '24: 4,989)

-6.4%

Jul '25 vs. Jun '25
(Jun '25: 5,259)



Active Listings

10,283

July 2025

+40.1%

Jul '25 vs. Jul '24
(Jul '24: 7,341)

+0.4%

Jul '25 vs. Jun '25
(Jun '25: 10,245)



Local Markets	Closed Sales		Median Sales Price		Median Days on Market	
	Jul '25	vs. Jul '24	Jul '25	vs. Jul '24	Jul '25	vs. Jul '24
Washington, D.C. Metro	4,692	-2.5%	\$640,000	+2.4%	15 days	+7 days
Alexandria City, VA	174	-4.9%	\$685,000	+5.4%	15 days	+7 days
Arlington County, VA	239	+21.9%	\$710,000	-10.4%	11 days	+2 days
Fairfax City, VA	34	+36.0%	\$777,500	-6.3%	7 days	+1 day
Fairfax County, VA	1,144	-6.2%	\$765,000	+4.2%	11 days	+4 days
Falls Church City, VA	21	+40.0%	\$945,000	-5.5%	17 days	+9 days
Frederick County, MD	312	-13.1%	\$500,000	+0.0%	13 days	+5 days
Loudoun County, VA	515	+2.6%	\$757,000	+1.4%	13 days	+6 days
Montgomery County, MD	948	-1.8%	\$660,000	+3.8%	12 days	+4 days
Prince George's County, MD	691	-12.2%	\$447,887	-0.1%	19 days	+9 days
Washington, DC	614	+9.8%	\$675,000	+0.0%	34 days	+12 days

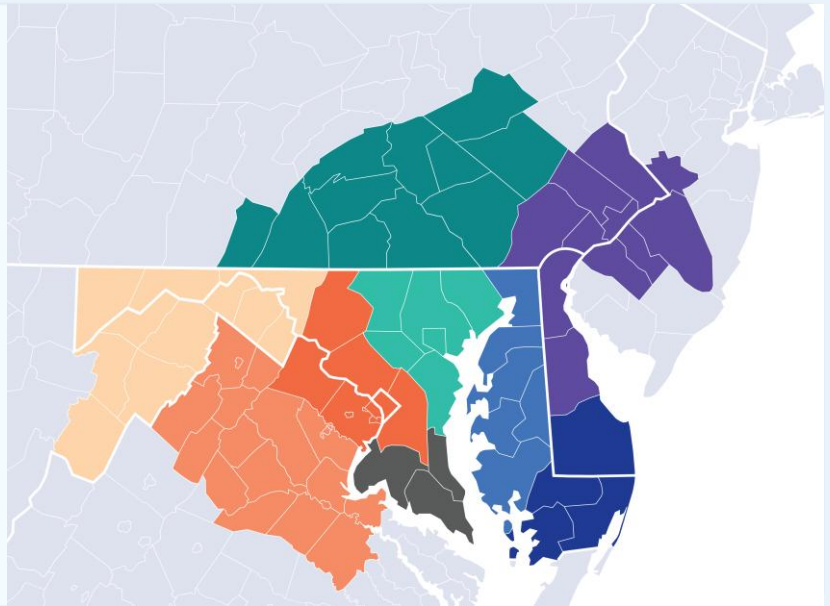
Local Markets	New Pending Sales		New Listings		Showings	
	Jul '25	vs. Jul '24	Jul '25	vs. Jul '24	Jul '25	vs. Jul '24
Washington, D.C. Metro	4,385	-3.4%	4,922	-1.3%	90,732	+7.3%
Alexandria City, VA	175	+15.9%	178	+4.1%	3,236	+8.8%
Arlington County, VA	204	+16.6%	211	+2.4%	4,024	+35.2%
Fairfax City, VA	28	-6.7%	34	+6.3%	550	+22.5%
Fairfax County, VA	1,043	-0.8%	1,047	-2.8%	22,326	+9.7%
Falls Church City, VA	9	-25.0%	10	+0.0%	169	-14.2%
Frederick County, MD	303	-20.5%	372	+7.8%	4,860	-6.7%
Loudoun County, VA	487	+5.2%	501	+4.4%	8,692	+17.2%
Montgomery County, MD	866	-0.1%	914	+3.9%	19,112	+11.5%
Prince George's County, MD	702	-17.6%	858	-6.7%	16,765	-8.1%
Washington, DC	568	+2.0%	797	-8.2%	10,998	+14.2%

Local Markets

	Active Listings		Months of Supply	
	Jul '25	vs. Jul '24	Jul '25	vs. Jul '24
Washington, D.C. Metro	10,283	+40.1%	2.48	+0.66 months
Alexandria City, VA	308	+43.9%	1.95	+0.66 months
Arlington County, VA	431	+43.2%	2.32	+0.67 months
Fairfax City, VA	61	+103.3%	2.35	+1.05 months
Fairfax County, VA	1,692	+40.0%	1.73	+0.45 months
Falls Church City, VA	38	+280.0%	3.17	+2.26 months
Frederick County, MD	667	+61.1%	2.22	+0.81 months
Loudoun County, VA	800	+50.1%	1.85	+0.5 months
Montgomery County, MD	1,742	+65.7%	2.18	+0.82 months
Prince George's County, MD	1,803	+45.1%	2.54	+0.8 months
Washington, DC	2,741	+17.3%	5.14	+0.73 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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